TeamConnect® Enterprise 4.0

© 2017 Mitratech

User Guide

TeamConnect® Enterprise 4.0 User Guide

Document ID: tce_4_0_user_1, published on 7/20/2017

Copyright © 2017, Mitratech Holdings, Inc. All rights reserved.

Disclaimer of Warranty

Mitratech Holdings, Inc. (Mitratech) makes no representations or warranties, either expressed or implied, by or with respect to anything in this document, and shall not be liable for any implied warranties of merchantability or fitness for a particular purpose or for any indirect, special or consequential damages.

Mitratech reserves the right to not support non-standard or non-default functionality and extended functionality available in third-party software, unless specifically documented as supported or certified in the Mitratech product documentation. For further information regarding third-party non-standard or non-default functionality, please contact Mitratech Support.

This document, along with the software that it describes, is furnished under license and may be used or copied only in accordance with the terms of such license. The content of this document is furnished for informational use only, is subject to change without notice, and should not be construed as commitment by Mitratech.

The following document is for the TeamConnect™ Enterprise 4.0 release only. Though every effort was made to ensure that the information in this document is correct and reliable, Mitratech does not assume any liability for any errors encountered in this document.

If you need support for TeamConnect™ Enterprise 4.0, please contact the Mitratech support team by sending an email to: support@mitratech.com. For more information about Mitratech, visit our web site: http://www.mitratech.com.

"Mitratech", TeamConnect™ Enterprise, TeamConnect™ Legal, TeamConnect™ Legal Matter Management, Collaborati®, TeamConnect™ Collaborati Spend Management®, TeamConnect™ Deadlines, TeamConnect™ AP Link, TeamConnect™ Office Suite, TeamConnect™ Legal Reports, TeamConnect™ SOP Manager, TeamConnect™ Financial Management, TeamConnect™ Screen Designer, and TeamConnect™ Upgrade Toolkit are trademarks and products of Mitratech Holdings, Inc. All other products or services mentioned in this book are the trademarks or service marks of their respective companies or organizations.

GOVERNMENT RIGHTS LEGEND:
Use, duplication or disclosure by the U.S. Government is subject to restrictions set forth in the applicable Mitratech license agreement and as provided in DFARS 227.7202-1(a) and 227.7202-3(a) (1995), DFARS 252.227-7013 (Feb 2012)FAR 12.212(a) (1995), FAR 52.227-19 (Dec 2007), or FAR 52.227-14, as applicable.

CONTACT US:
Mitratech Holdings, Inc.
5001 Plaza on the Lake Suite 111, Austin, TX 78746
Phone: (512) 382-7322

NOTE: Throughout Mitratech 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

Acknowledgements

This product includes software developed by the following organizations:

Apache Software Foundation (http://www.apache.org/)

OpenSymphony Group (http://www.opensymphony.com/).

The license agreements for these and other supplemental software packages can be found in your installation media in subfolder Supplemental_Software_Licenses. That subfolder also contains Open Source Components.pdf, which lists the locations, license types, and specific versions of components that are available on the web.

Table of Contents

Part I Enterprise User Help 12

1 Getting Started 12

Authenticating Users 12
Logging In 13
Logging Out 16
User Interface 17
Getting Hints and Help 18
Web Browser Buttons and Commands 18
Personalizing Your Settings 19
Changing Preferences 19
Selecting Region, Date, and Time Formats 20
Defining Search Result Settings 22
Defining the Time Interval for the Appointment Calendar 23
Enabling Accessibility Mode 24
Changing Screen Appearance 24
Changing Password 24
Setting Up Email Notifications 25
Choosing Other Setting Options 27
Home Pages and Portal Panes 28
Working with Home Pages 29
Information in Portal Panes 30
Running Business Objects Reports 31
Adding Portal Panes to Home Pages 32
Modifying Home Page Settings 33
Page Title 33
Customizing Portal Pane Layout 34
Using Search Views in Portal Panes 34
Editing Portal Pane Custom Content 36
About Synchronizing Home Pages and Portal Panes 37

2 Records 37

Displaying Types of Records 39
Viewing Collections of Records 41
Managing Collections 42
Searching for Specific Records 44
Global Search 46
Modifying a Collections Search 49
Using Custom Search 50
Specifying Search Criteria 50
Operators 52
Adding Additional Fields 56
Specifying Results Columns 58
Executing the Search 58
Saving the Search 59
Using Search Modules 59
Exporting a Search Results List 60
Sorting Information 61
Single-column Sort 61

Multi-column Sort ... 62
Using a Record in View Mode ... 64
Creating a Record ... 66
Wizards ... 68
Editing a Record ... 68
Editing Multiple Records ... 69
Record Locking During Editing ... 71
Working with Different Types of Fields ... 72
check-box ... 72
Date Field ... 72
Time Zone Independent Date Fields ... 73
List Fields ... 73
Drop-down List ... 73
List Box ... 75
Memo Text ... 76
Number ... 76
Option Buttons ... 77
Text ... 77
Working with Batch Entries ... 77
Primary Entries ... 78
Deleting an Entry ... 79
Editing Batch Entries ... 79
Setting Category Details ... 80
Canceling Your Edits ... 83
Saving an Edited Record ... 83
Handling Unsaved Records ... 84
Copying a Record ... 85
Reassigning Work ... 88
Importing Data to Create Records ... 89
Creating a Data File ... 90
Importing Data ... 92
Deleting Records ... 98
Printing Records ... 101
Working with Record Security ... 102
Viewing Record Security ... 104
Editing Record Security ... 105
Public and Private Record Security ... 105
Working with Record History ... 106
Opening History Pages ... 107
Viewing General History Information ... 108
Setting History Categories ... 109
Creating Record History Entries ... 109
Working with Related Records ... 110
Working with Record Documents ... 111
Viewing Workflow for a Record ... 111
3 Contacts and Address Books ... 111
Contacts ... 111
Types of Contact Views ... 113
Creating a Contact ... 114
Duplicate Contacts ... 120
Setting Contacts Primary Information ... 120
Setting Contact Details ... 121
Adding and Removing Contacts Categories ... 123
Viewing the Address Books for a Specific User ... 123

Setting Contact Rates ... 124
Relating Contacts ... 129
Setting Contact Skills ... 129
Selecting Contact Territories ... 130
Viewing Company Employees ... 130
Viewing Contact Involvement ... 131
Address Books ... 133
Subscribing to Address Books ... 134
Viewing Contacts in an Address Book ... 135
Creating an Address Book ... 136
Adding Contacts to an Address Book ... 137
Removing Contacts from an Address Book ... 138
Making an Address Book Public or Private ... 138
4 Projects ... 139
Creating a New Project ... 140
Creating Different Types of Projects ... 145
Child Projects ... 145
Embedded Projects ... 145
Editing a Project ... 146
Adding or Removing Project Categories ... 148
Changing Project Phases ... 149
Assigning Contacts to Projects ... 149
Viewing Users Assigned to a Project ... 150
Adding Assignees to Projects ... 151
Changing the Primary Assignee for a Project ... 152
Unassigning or Reassigning Assignees ... 153
Removing Assignees from a Project ... 154
Creating Relationships between Projects ... 154
Managing Involved Parties for Projects ... 154
Adding or Editing Involved Parties ... 155
Changing the Status of an Involved Party ... 157
Changing an Involved Party Role ... 157
Relating Involved Parties ... 158
Adding or Editing Involved Party Accounts ... 158
Managing Milestones ... 159
Viewing Milestones ... 159
Creating or Editing Milestones ... 159
Setting Milestone Categories ... 161
Managing Appointments for a Milestone ... 161
Managing Milestone Tasks ... 161
Adding Tasks to Projects ... 161
Adding Appointments to Projects ... 162
Adding Expenses to Projects ... 162
Adding Accounts to Projects ... 163
5 Reports ... 163
Viewing Reports ... 164
Dashboards and Portal Panes ... 166
Using Report Folders ... 167
Running Reports ... 169
Running Drill-down Reports ... 170
Viewing a Cached Report ... 171
Changing the Appearance of a Report ... 172
Types of Report Formats ... 174
Exporting Reports ... 177

Building Reports **177**
General Properties 178
Data Series 179
Entering New Data Series Information 181
Specifying Data for a Data Series 182
Filtering the Data 184
Determining the Data that Displays 187
Combining Multiple Data Series Using Cross-Object Reporting 190
Join Conditions 190
Results Display Fields 192
Sample for Combining Data Series 192
Best Practices for Combining Data Series 194
Chart 194
Scheduler 201
Edit Schedule Information 201
Viewing a Schedule 202
Activating or Deactivating a Schedule 202
Running a Scheduled Report Now 203
Deleting a Schedule 203
Changing an Existing Schedule's Run Time 203
Security 203
Localizing Reports **203**
Native Reporting FAQ **205**
Cross-Object Reporting FAQ 209
Cross-Object Reporting - Supplemental Information 211
6 Appointments Calendar and Tasks **214**
Appointments Calendar **215**
Viewing the Appointments Calendar 216
Opening an Appointment 218
Appointments Created Using Outlook 218
Creating or Editing Appointments 218
Creating or Editing an Appointment Manually 219
Using the Appointments Scheduler 221
Adding and Removing Appointment Categories 223
Adding Appointment Attendees 223
Adding Appointment Resources 224
Viewing or Creating Appointment History 225
Tasks **225**
Using the Task General Page 226
Viewing Tasks 226
Creating or Editing Tasks 227
Creating a Task Manually 228
Assigning or Reassigning Tasks to Users 232
Posting Tasks 233
Voiding Tasks 234
Viewing Task Transactions 235
Viewing or Creating Task History 235
Using the Task Entry Tool 235
Creating Multiple Tasks 236
Editing Multiple Tasks 238
Posting Multiple Tasks 238
Deleting Multiple Tasks 239
7 Finance **239**
Accounts **240**

Viewing Accounts ... 241
Creating or Editing an Account ... 242
Creating or Editing an Account Manually ... 242
Creating a Shadow Invoice Account ... 247
Adding or Removing Categories from an Account ... 248
Parent and Child Accounts ... 248
Assigning Parent Accounts ... 249
Viewing or Creating Child Accounts ... 250
Activating or Deactivating Accounts ... 250
Adding and Subtracting Funds ... 251
Transferring Funds Between Accounts ... 252
Setting Transaction Posting Criteria ... 253
Viewing Transactions History for an Account ... 266
Viewing or Creating Account History ... 267
Expenses ... 267
Viewing Expenses ... 269
Creating or Editing an Expense ... 269
Creating or Editing an Expense Manually ... 270
Preparing an Expense for Posting ... 272
Posting an Expense ... 275
Voiding Expenses ... 276
Viewing Expense Transactions ... 276
Viewing or Creating Expense History ... 276
Working with the Expense Entry Tool ... 276
Entering Expenses ... 277
Copying Expenses ... 279
Editing Expenses ... 280
Posting Expenses ... 280
Deleting Expenses ... 281
Updating Expense Unit Prices ... 281
Invoices ... 284
Viewing Invoices ... 287
Searching for Invoice Line Items ... 289
Appeals Invoices ... 291
Differences Among Invoices ... 293
Invoice Duplicates ... 295
Invoice Versions ... 295
Viewing Previous Invoice Versions ... 296
Viewing Invoices Submitted in Different Currencies ... 296
Invoice Procedures (without Workflow) ... 297
Invoice Procedures (with Workflow) ... 297
Creating an Invoice Manually ... 299
Timekeeper Rates ... 304
Adding Invoice Line Items ... 305
Copying an Invoice Line Item ... 308
Editing Invoices ... 309
Changing the Displayed Currency on an Invoice ... 310
Editing Invoice Line Items ... 310
Deleting Invoice Line Items ... 311
Preparing an Invoice for Posting ... 312
Posting an Invoice ... 315
Adjusting an Invoice Summary ... 317
Adjusting Invoice Line Items ... 324
Line Item General ... 334

Approving Invoices ... 334
Rejecting Invoices ... 335
Sending an Invoice for Review ... 337
Reviewing an Invoice ... 338
Voiding an Invoice ... 338
Using the Invoice Summary Breakdowns Page ... 340
Adjusting Net Amounts on the Summary Breakdowns Page ... 342
Viewing and Creating History for an Invoice ... 343
Viewing Invoice Summary Adjustment History ... 343
Viewing Line Item Adjustment History ... 343
Viewing Invoice Transactions History ... 344
Viewing Invoice Workflow ... 344
Budget Requests ... 345
Creating a Budget Request ... 347
Submitting a New Budget Request ... 348
Budget Requests Created by Vendors ... 348
Editing a Budget Request ... 348
Adjusting Budget Requests ... 349
Canceling a Budget Request ... 350
Deleting a Budget Request ... 351
Handling Budget Request Workflow ... 351
Updating Exchange Rates ... 351
8 Documents ... 353
Searching for Existing Documents ... 356
Viewing Documents ... 357
Opening Documents ... 359
Sharing Documents using Email ... 360
Using Documents Collections ... 361
Managing Documents ... 362
Adding a Document to TeamConnect ... 362
Editing Documents ... 365
Checking Out a Document ... 366
Checking In a Document ... 367
Canceling a Document Check Out ... 368
Creating a Document Folder ... 368
Exporting a List of Documents in a Folder ... 369
Copying Documents ... 370
Moving Documents ... 373
Creating a Document Shortcut ... 374
Creating a Link to a Web Page ... 375
Downloading Documents ... 376
Generating Documents Using TeamConnect Data ... 377
Using Windows Explorer with Documents (WebDAV) ... 379
Viewing or Editing General Information of a Document ... 380
Viewing Document Versions ... 382
Reverting to a Previous Version ... 382
Adding and Removing Document Categories ... 383
Viewing or Creating Documents History ... 383
Printing Documents ... 383
Deleting Documents and Document Folders ... 384
Updating Security Rights of Document Folders ... 385
Working with the IMAP Server and Email ... 385
Setting up IMAP Accounts ... 386
Setting up an IMAP Account in Outlook ... 386

Refreshing IMAP Folders in Outlook ... 387
Setting up an IMAP Account with Lotus Notes ... 388
Refreshing IMAP Folders in Lotus Notes ... 389
Managing Email in Email Clients ... 389
Available Operations ... 390
Differences in Client Operation ... 390
Using Email in TeamConnect ... 391
Viewing Email Folders ... 391
Viewing Email Messages ... 393
Searching for Email ... 395
Downloading Email Messages and Attachments ... 395
Deleting Email ... 396
Deleting TeamConnect-IMAP Subfolders ... 396
Email Security ... 397
Using the Share Feature ... 399
9 Workflow Processes ... 399
Using the Approval Schedule and Approval History ... 401
Setting Up Email Approvals ... 405
Using Approval Process Email Notifications ... 407
Submitting Requests for Actions that Require Approval ... 408
Viewing Your Active Requests ... 409
Viewing Your Completed Requests ... 411
Canceling Approval Requests ... 413
Approving, Rejecting, and Reviewing Requests ... 414
Approving or Rejecting a Request ... 414
Approving or Rejecting from My Approvals ... 417
Approving or Rejecting Within Records ... 420
Approving or Rejecting through Email ... 423
Sending Requests for Review ... 425
Reviewing a Request ... 427
Reviewing from My Approvals ... 428
Reviewing Within Records ... 429
Making Workflow Decisions ... 430
Monitoring Current Requests ... 431
Reviewing Completed Requests ... 436
Returning Requests to Requestors ... 437
Reassigning Individual Requests ... 438
Reassigning All Requests for a User ... 439
Returning Requests with Failed Actions to Workflow ... 443
Returning Requests With Errors to Workflow ... 445
Using Hold Conditions ... 446
10 Accessibility ... 449
Enabling Accessibility Mode ... 449
Using Assistive Technology ... 450
Using JAWS® with TeamConnect ... 450
Using Keyboard Shortcuts ... 451
Commonly Used Access Keys ... 451
Using Keyboard Features ... 453
TeamConnect-Specific Access Keys ... 454
11 TeamConnect Mobile ... 456
Invoices Pending for Approval ... 457
Viewing and Adjusting Invoice Details ... 458
Contacting a Vendor or Approver ... 460

12 Troubleshooting and Frequently Asked Questions 460
Frequently Asked Questions 460
Managing Records 461
Contacts/Address Books 463
Reports 463
Other Questions 465
Troubleshooting 465
13 Glossary 466
Index 478

1 Enterprise User Help

Welcome to the *TeamConnect® Enterprise 4.0 User Help*.

Contacts	Address Books
Projects	Reports
Appointments	Accounts
Invoices	Expenses
Documents	Approvals

1.1 Getting Started

You get started with TeamConnect by following these steps:

1. Be able to access TeamConnect using your login information. See Logging In and Authenticating Users.
2. Familiarize yourself with the user interface. See User Interface for more information about the interface.
3. Personalize your preferences and other settings. See Personalizing Your Settings for more information.
4. Modify your home page and portal panes if necessary. See Home Pages and Portal Panes for more information.

1.1.1 Authenticating Users

Authentication is the process of verifying that you are an authorized user by comparing your identification with information stored in the system. Login procedures vary based on the authentication mechanism used by your organization.

There are two main methods:

- Standard Login
- Single Sign-on Authentication

Standard Login

If you access the login URL and see a screen with username and password fields, your organization uses the standard login. This type of authentication compares your username and password with stored information and grants access if a match is made. For a more details, see Logging In.

Login Screen

Single Sign-on Authentication

Single sign-on authentication lets you log in without providing a username and password—assuming you are identified through some local network authentication process. If you are successfully authenticated, a new window opens and displays your home page. For more details on logging in using single sign-on, contact your administrator.

If you close the window or your session expires, you cannot reuse the original window even if you are still logged in to your local network. To use single sign-on again, you must open a new browser window and go to the login URL.

Pages are often customized for an organization's specific needs. The look of your pages, and the data shown on those pages, may be quite different from the "out of the box" version. In this documentation, screen images and other descriptions refer to the "out of the box" appearance. However, even if your organization's performed customizations, the ways of navigating within and between pages will be very similar to those described here.

1.1.2 Logging In

Whenever you log in, you open a working session. A working session starts when you log in to the system and ends when you properly log out. At any time, you can have only one open session per user.

If your organization has a single sign-on authentication mechanism in place, see Single Sign-on Authentication.

Localized Language Support

The language of the text on the Login screen is either the default language that is set in your browser, or the one set as the system default language. If you specified a different language in your personal Preferences page, once you log in, your selected language is used.

Using Standard Login

If your organization is using a standard login screen, obtain the following information from your administrator:

- TeamConnect URL
- Your username
- Your default password

(You change your personal password after you log in for the very first time. See Changing Password.)

To log in

1. Open your browser.
2. In the **Address** field at the top of the browser window, type the URL and click Go.
   The Login screen is displayed.
3. Enter your username.
   Usernames are not case-sensitive. No spaces are permitted in username.
4. Enter your password.
   Passwords are always case-sensitive and no spaces are allowed in passwords. Passwords may contain special characters.
5. Click **Log In**.
   Your home page with your name displayed at the top appears in your browser window.

Forced Password Changes

Depending on the security policies of your organization, you may occasionally see a page requiring you to change your password immediately after logging in. Type your new password twice for verification before continuing. Do not use a password that you have used in the past.

Locked Account

After several unsuccessful attempts to enter your password, your account may lock and an error message appears. Please contact your system administrator. Your administrator can unlock the account and assign a new password.

Note: *When your account is locked, you are still an active user and can be included when users schedule appointments, or assign tasks.*

Previous Session Found

If you previously shut down by closing the browser window without logging out properly, you must choose an option before continuing.

Previous Session Found Screen

Previous Session Found Screen Options

Option	Description
Recover Session	When you select this option, your home page is displayed on your screen: Records that had been edited, but not saved, in the previous session will still appear in the "Unsaved Items" link.
New Session	When you select this option, you log in to a new session with no Unsaved Items shown.

About Home Pages

The home page is the first page you see after logging in. Home pages function as your starting point and contain specialized sections called portal panes. Portal panes provide links to create and access various records and information that is of importance to you, such as:

- Your appointments
- Your projects
- Your documents
- Stocks and weather
- Your pending approvals
- News headlines
- Your tasks
- Business Objects® WebIntelligence reports
- Saved searches

Depending on how many user groups you belong to, and how many home pages are available, you may have access to more than one home page.

Currently Logged in User

Every time you log in you become the currently logged in user. That means that the system recognizes who you are and displays your personal home pages, your font and color preferences on the screen, your pending tasks, approvals, upcoming appointments, and other information that is relevant to you. Your name is automatically recorded in the **Created by** and **Modified by** fields of all records that you create or edit. You are also automatically added as an attendee for all appointment records that you create.

Session Time-out

Sometimes when you are logged in but do not use it for a certain period of time, you may be notified that your session has expired. This is also known as a session time-out. The time-out period is set by your administrator.

When you attempt to log back in, you may be notified that you already have an open session. For details on your options, see Previous Session Found.

Tip: *If you must step away from your desk or are interrupted, save your work to ensure that you can continue working later.*

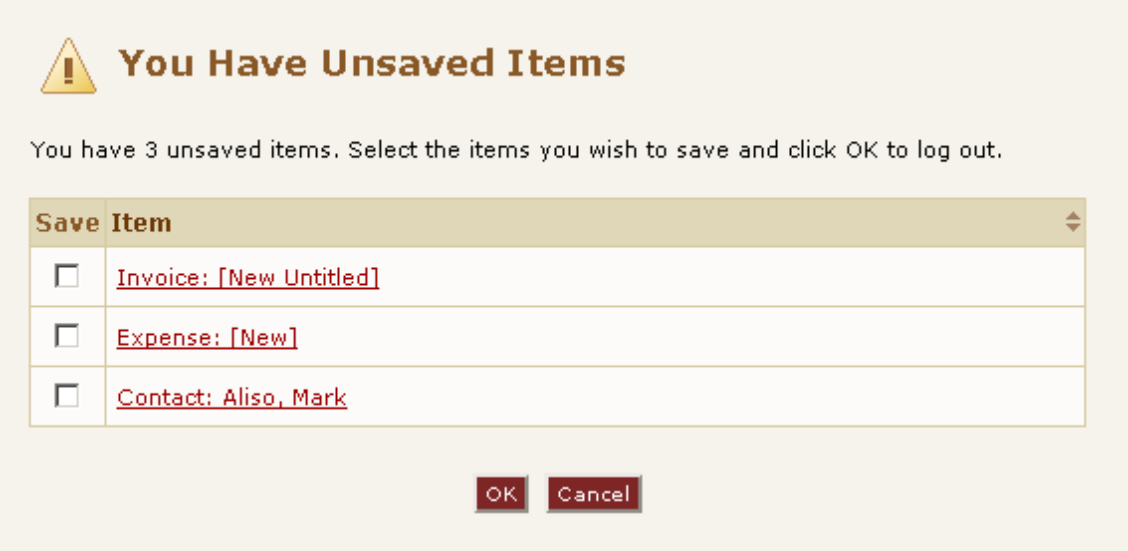
1.1.3 Logging Out

When you are finished working, you need to log out from it to make sure that the application is shut down properly, and no data that you have worked with is lost.

To log out from

On the global toolbar, click the Log Out link.

- If all records that you worked on are saved, you are immediately logged out.
- If any records that you have worked with are not saved, the **Unsaved Items** screen appears.



Unsaved Items Screen

Perform one of the following options:

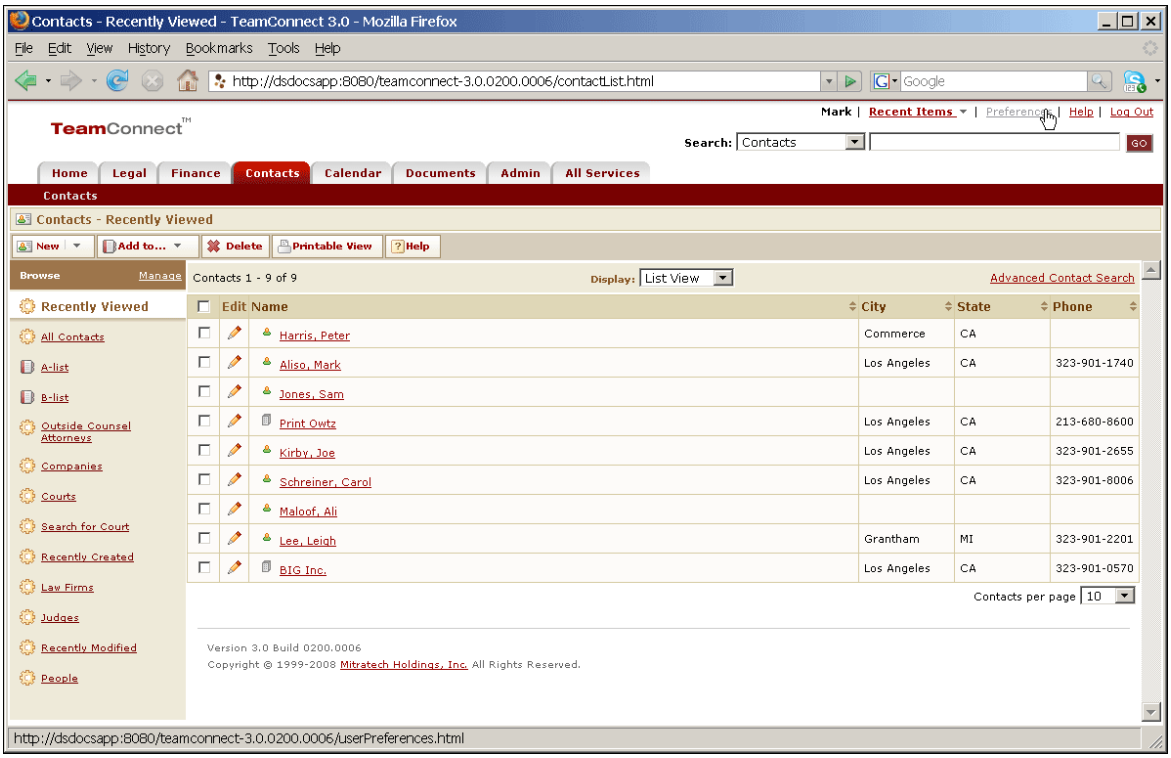
- If there are any records in the displayed list that you want to save, select the check-box next to them and click **OK** to go back and save the records.
- If you do not want to save any records, click **OK**.
- If you do not want to log out, and want to continue working with the records, click **Cancel**.

1.1.4 User Interface

A typical page displays the areas that you have rights to view. The fields on your page might vary, but the following components are the same:

- **Browser Title Bar**—Displays the application's name.
- **Global Toolbar**—Contains links that show your pending work and let you do other common tasks.
- **Global Search**—Allows you to search for records by their name or number, across one record type or all record types.
- **Tab Bar**—Contains a set of buttons that provide quick access to record types and functions. In some cases, clicking a tab immediately takes you to a new page. In other cases, clicking a tab button presents a short group of sub-tab links in the line just below the tabs.
- **Record Screen Title Bar**—Shows the record type that you are working with. For a record list page, the name of the current collection is shown. For an individual record page, the name of the record is shown.
- **Left Pane**—Provides links that take you to pages related to your current page. If you are viewing a list of records, the links in the left pane primarily point to other collections. For more information about collections, see Viewing Collections of Records. If you open a record, clicking on a link in the left pane opens pages related to the record.

- **Body**—Contains the main section of the screen, where you work with records, set preferences, use tools, and view home page information.



Typical Page

1.1.4.1 Getting Hints and Help

Hover Feature

In many areas of the user interface, a small informational window appears if you hover over an item. If you are hovering over a link to a record, the snapshot will contain some basic facts about that record. For example, hovering over a link to a Project record will show the Project's name, main assignee, current phase, and creation date. Almost all record links behave this way. This feature does not apply to record links in calendar views, or lists of embedded records.

Online Help

On every page, online help is available by clicking the **Help** button in the record toolbar. In many cases the online help that appears will be specific to the page you are on; in some cases a more general help screen will appear.

1.1.4.2 Web Browser Buttons and Commands

You can use common web browser commands (Back, Forward, Stop, and Refresh) while working. There are some things to keep in mind regarding these buttons and commands:

- There is a limit of 10 uses of the Back button or command. You cannot see pages that are more than 10 pages older than your current page.

- If you click Back or Refresh, you lose any edits that you had done on the current page. If you are editing something, then click Back twice, then click Forward twice, you will be on the page you had been editing, but the data you typed will be gone.
- The Refresh button redisplays a page, but it does not rerun any actions that you may have taken on that page. However, if you are on a page that displays search results, clicking Refresh will re-execute the search and display the newest results.
- If you click the Stop button while a page is loading, you will leave the page in an inconsistent state. You cannot rely on items on the page working correctly unless you click Refresh to force the page to finish loading.

1.1.5 Personalizing Your Settings

You can customize the look of the user interface to meet your needs or personal preferences. For example, you can change the color of your screen and menus. You can also define your own settings regarding email notifications, home pages, and password. All of these settings can be defined and modified through the **Preferences** in the global toolbar.

Note: *Some preferences, such as font size, can only be changed using the settings in your browser. For more information, see your browser's online help or documentation.*

To access your personal settings

On the global toolbar, click **Preferences**.

The General preferences page appears. The left pane shows links for all the preferences pages:

- **General**—Define date and time formats, search result settings, calendar settings, and accessibility settings. For details, see Changing Preferences.
- **Appearance**—Define the background color and the font colors and sizes for your screens. For details, see Changing Screen Appearance.
- **Reset Password**—Change your password. For details, see Changing Password.
- **Email Notifications**—Request email notifications when you are assigned to new tasks and projects, or when new appointments are scheduled for you. For details, see Setting Up Email Notifications.
- **Other Settings**—Enter specific information required for system integrations. For details, see Choosing Other Setting Options.

1.1.5.1 Changing Preferences

You can customize the look of the Edit and View modes according to your personal preferences in terms of screen colors, font size, and color. You can also define email notification settings, password, and other options.

Note: *The settings that you define and modify only affect your own screen. The changes you make to your settings have no effect on other users.*

- Region, Date, and Time formats, and the time zone. See Selecting Region, Date, and Time Formats.
- Search Results appearance. See Defining Search Result Settings.
- Miscellaneous settings. See Defining the Time Interval for the Appointment Calendar.

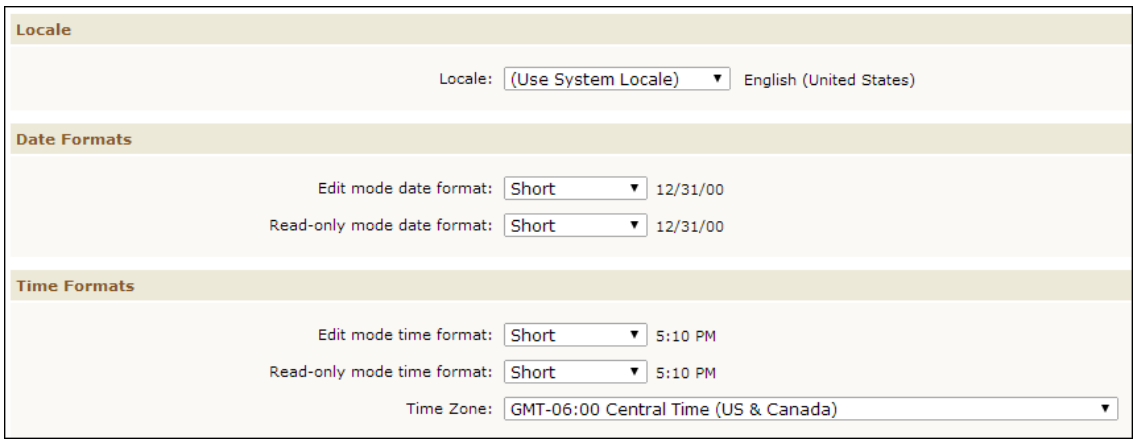
1.1.5.1.1 Selecting Region, Date, and Time Formats

You can specify the locale that you want to use for your sessions. You can customize the display of the date and time formats and specify your time zone. All dates and times in your records are displayed in the selected time zone, regardless of the time zone in which they were originally set.

Important: *Be sure that the time zone that you specify matches the equivalent settings in your computer's operating system. Your computer's settings are used by your web browser when displaying the Calendar page and in other areas.*

To select a region, date format, time format or a time zone

1. On the global toolbar, select **Preferences**.
2. In the **Date Formats** and **Time Formats** sections, fill in the appropriate fields as described in User Preferences Field Descriptions for Regions and Dates table.
3. Click one of the **Save** options.



Fields in the Region Section, General Page of Preferences

User Preferences Field Descriptions for Region and Dates

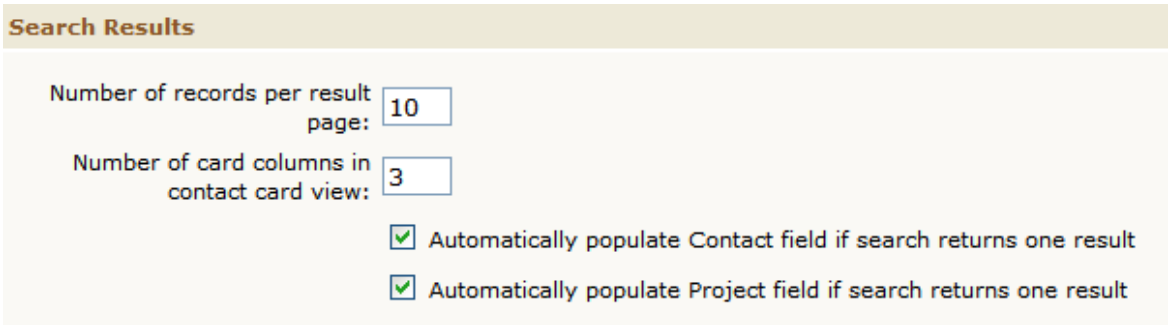
Label	Description
Locale	If you have never specified a locale before, the existing system default locale is shown. You may choose a locale from the drop-down list. Locale controls the language of text in the application, and the format settings for date, time, and numbers. When you choose a different locale the date and time format fields, described below, change to reflect that locale.

Edit mode date format	To change the way dates display when a record is editable click this drop-down list and select one of the following: • **Short**—Displays the date in a mm/dd/yy format. For example, 12/25/05 to represent December 25, 2005. • **International**—Displays the date in a yyyy-mm-dd format. For example, 2005-12-25 to represent December 25, 2005.
Read-only mode date format	To edit the way dates display when a record is not editable, click this drop-down list and select one of the following (where mm is month, dd is day, and yyyy is year): • **Short**—Displays the date in a mm/dd/yy format. For example, 12/25/05 to represent December 25, 2005. • **Medium**—Displays the date in a Month dd, yyyy format when the month is abbreviated. For example, Dec 25, 2005. • **Long**—Displays the date in a Month dd, yyyy format. For example, December 25, 2005. • **Full**—Displays the date in a day, Month dd, yyyy format. For example, Saturday, December 25, 2005. • **International**—Displays the date in a yyyy-mm-dd format. For example, 2005-12-25 to represent December 25, 2005.
Edit mode time format	To change the way times display when a record is editable, click this drop-down list and select one of the following: • **Short HH:MM AM/PM**—Displays the time in a HH:MM AM/PM format. For example, 5:10 PM. • **International**—Displays the time in a HH:MM:SS format where HH can be from 1 to 24. For example, 17:10:52.
Read-only mode time format	To edit the way times display when a record is not editable, click this drop-down list and select one of the following: • **Short HH:MM AM/PM**—Displays the time in a HH:MM AM/PM format. For example, 5:10 PM. • **Medium**—Displays the time in a HH:MM:SS AM/PM format. For example, 5:10:52 PM. • **Long**—Displays the time in a HH:MM:SS AM/PM Time Zone format. For example, 5:10:52 PM CST. • **International**—Displays the time in a HH:MM:SS format where HH can be from 1 to 24. For example, 17:10:52.
Time Zone	Click the drop-down list to change the system Time Zone.

	To ensure that the date and time fields are accurate, the time zone that you select here must match the time zone of the computer on which the browser is running. Note that when you change the time zone in your operating system, your web browser will not recognize the change until you close and reopen the web browser. Be sure to do this. Daylight savings time adjustments, if applicable, will be derived from the time zone that has been chosen. If you do not select a time zone in user preferences, the system uses the admin time zone settings. In this case, the admin time zone settings must match the time zone of the computer on which the browser is running. See the "Setting Up Region Settings" section in the *Administrator's Guide*.

1.1.5.1.2 Defining Search Result Settings

The search result settings allow you to customize search results, such as the number of records displayed per page in search results.



Search Result Settings

The search result settings are described as follows:

User Preferences General Page Field Descriptions

Label	Description
Number of Records per result page	Enter the number of records to display per page of search results. The default is 10.
Number of card columns in contact card view	(Only for contacts search views where the Results Display Type is set to Card) For contacts search results, enter the number of columns to display. The default is 3.
Automatically populate Contact field if search returns one result	Do one of the following: • To automatically populate a Contact field when the related Contact Search Module returns one record

	result, select the **Automatically populate Contact field if search returns one result** check-box. • To display a link to a record if a search returns one record result, clear the Automatically **populate Contact field if search returns one result** check-box.
Automatically populate Project field if search returns one result	Do one of the following: • To automatically populate a Project field when the related Project Search Module returns one record result, select the **Automatically populate Project field if search returns one result** check-box. • To display a link to a record if a search returns one record result, clear the Automatically **populate Project field if search returns one result** check-box.

1.1.5.1.3 Defining the Time Interval for the Appointment Calendar

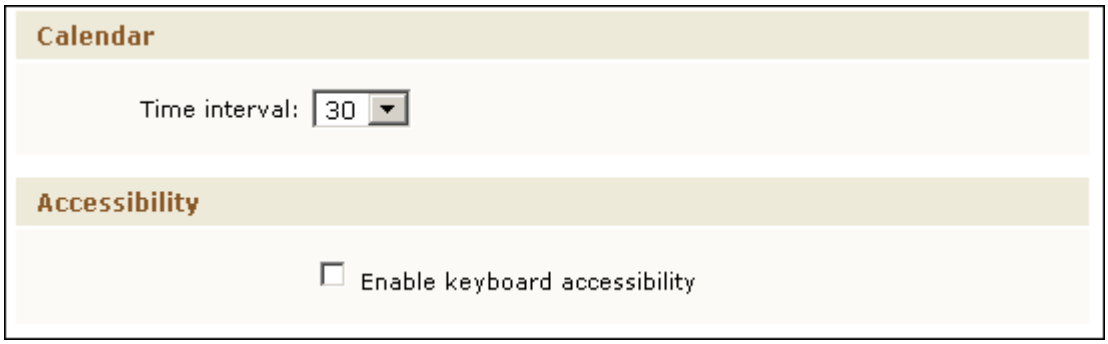
Use the General page of user preferences to define or change the time interval that you can view and select when creating or changing an appointment.

For example, if you select 30 minute intervals, when you create or edit an appointment, your appointment time choices are listed in 30 minute increments, such as 8:00 am, 8:30 am, 9:00 am, and 9:30 am.

Note: *This setting does not affect the way that your calendar listings appear when you click the* ***Calendar*** *tab.*

To change the time interval

Select an option from the **Time interval** drop-down list. The default is 30 minutes.



General Page, Calendar Time Interval Setting

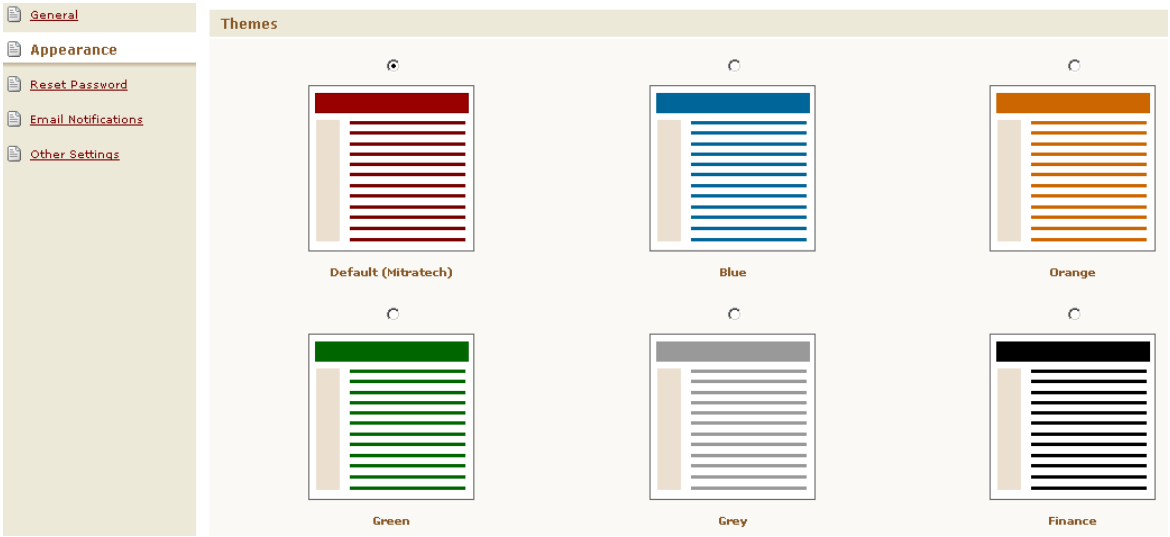
1.1.5.1.4 Enabling Accessibility Mode

Use the **General** page of user preferences to provide additional accessibility options for those with vision impairment or difficulty using the mouse. For more information, see Accessibility.

1.1.5.2 Changing Screen Appearance

You can change the color scheme of your pages by using the **Appearance** page that you can access through the **Preferences** link on the global toolbar.

Choose one of the Themes that are shown on that page, then click the **Update** option.



Options for Color Themes

1.1.5.3 Changing Password

Use the **Reset Password** page in user preferences to change your log in password.

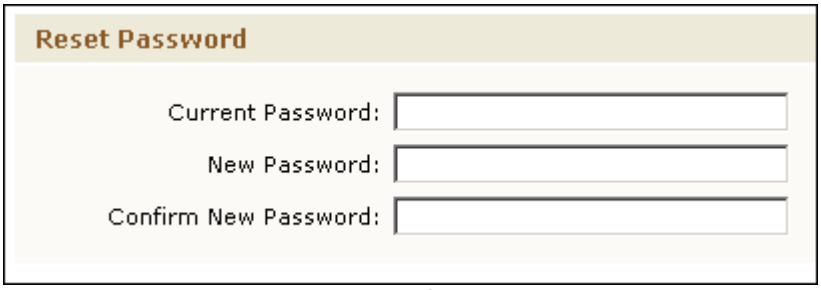
To change your password

1. On the global toolbar, choose **Preferences**.

   The preferences **General** page opens.

2. In the left pane, click the **Reset Password** link.

   The **Reset Password** page opens.



Password Settings

If enabled, the details of your company's password policy may display on this screen.

3. In the **Current Password** field, type your current password.
4. In the **New Password** field, type your new password.

   Important: *If the details of your company's password policy are not displayed, contact your administrator for password requirements.*

5. In the **Confirm New Password** field, retype your new password.
6. Click the **Update** option.
7. Log off and log back in with your new password.

1.1.5.4 Setting Up Email Notifications

You can set automatic email notifications for yourself to alert you when:

- You are scheduled to attend an appointment
- You are assigned to a project
- You are assigned to a new task
- You receive requests to approve
- You receive requests to review
- You receive back a review of an approval request that you asked for
- You have an approval request that will expire
- You have an approval request that is canceled and removed from your list

If you are a Process Manager for any approval processes, you have additional email notification options to alert you when:

- An error occurs in a process
- A route or stop expires
- A request is rejected

Rules for what actions require approval are activated in the system by your administrator. For example, email notifications can be set for approval or rejection of invoice posting.

Note: *For more details about approval processes, see Workflow Processes. Also, see Using Approval Process Email Notifications.*

To receive email notifications, your default email address must be correct in your personal contact record (see Creating a Contact). This email address is also used when you trigger a message to be sent to other users. For example, when you assign other users to tasks, the default email address in your contact record is used as the **From** address of the message.

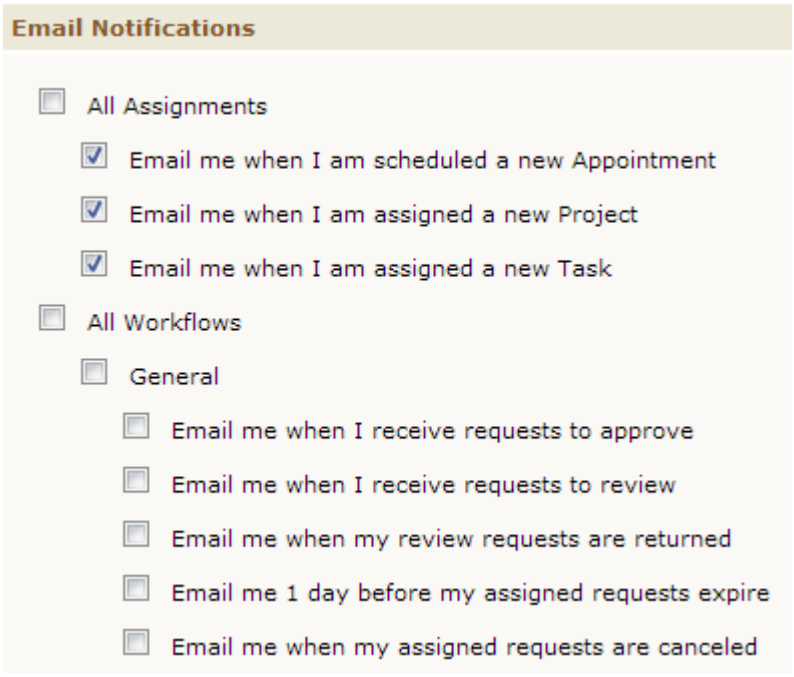
Note: *If your system is set to a language other than default English, email notification text appears in your preferred language if you are the only recipient. When there are multiple recipients on an email, the email notification is sent in the selected system language.*

To request email notifications

1. Make sure that your email address is correct.
2. On the global toolbar, choose the **Preferences** link, then the **Email Notifications** link.
3. Select the appropriate check-boxes next to the notifications or categories of notifications you want to receive.
4. Click the **Update** option.

The next time an event occurs for which you have requested email notifications, you will receive an email.

Email notification check-boxes are categorized by "All Assignments", "All Workflows", and by project under "All Workflows". Selecting one of the parent check-boxes will automatically select all of the check-boxes in that category. If active approval rules exist, they will appear under the appropriate project heading under the "All Workflows" check-box.



Email Notifications Screen

1.1.5.5 Choosing Other Setting Options

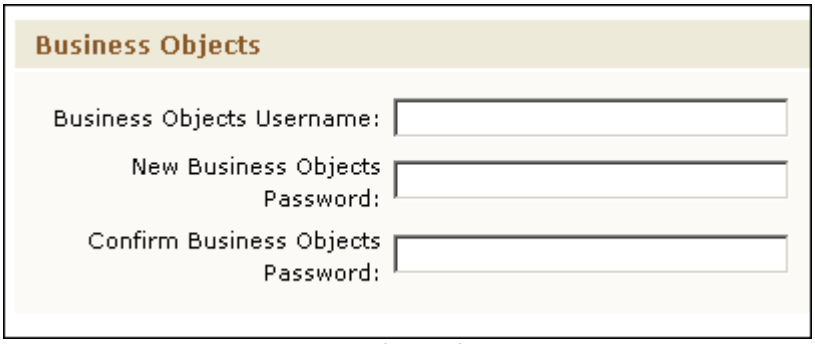
Depending on specific information entered by your administrator, the options in your **Other Settings** page vary. Unless you use another system such as Microsoft Exchange, Lotus Notes, Business Objects, or other products, you do not need to enter data into the **Other Settings** page. For more information on miscellaneous settings, contact your administrator.

Business Objects WebIntelligence Report Settings

If your organization uses Business Objects WebIntelligence to generate reports based on the data you enter, and your TeamConnect and WebIntelligence username and password combinations are different, you should make the appropriate entries on the **Miscellaneous Settings** tab of your **Preferences** screen. This is used to allow a single sign-on to WebIntelligence.

To set up your access to WebIntelligence

1. On the global toolbar, click **Preferences**, then click the **Other Settings** link.
2. In the **Business Objects** settings section, type your WebIntelligence username and password. Retype the password to confirm it.



Business Object Settings

Important: *If you use Business Objects but you do not see this section, contact your administrator.*

3. Click the **Update** option.

For details, see Running Business Objects Reports.

1.1.6 Home Pages and Portal Panes

The *home page* is the first page you see after you log in. Home pages contain specialized sections called *portal panes*. From portal panes, you can create and access various records and information that is important to you, such as:

- Your appointments
- Your projects
- Your documents
- News headlines, stocks, and weather
- Your pending approvals
- Your tasks
- Business Objects WebIntelligence reports
- Saved searches

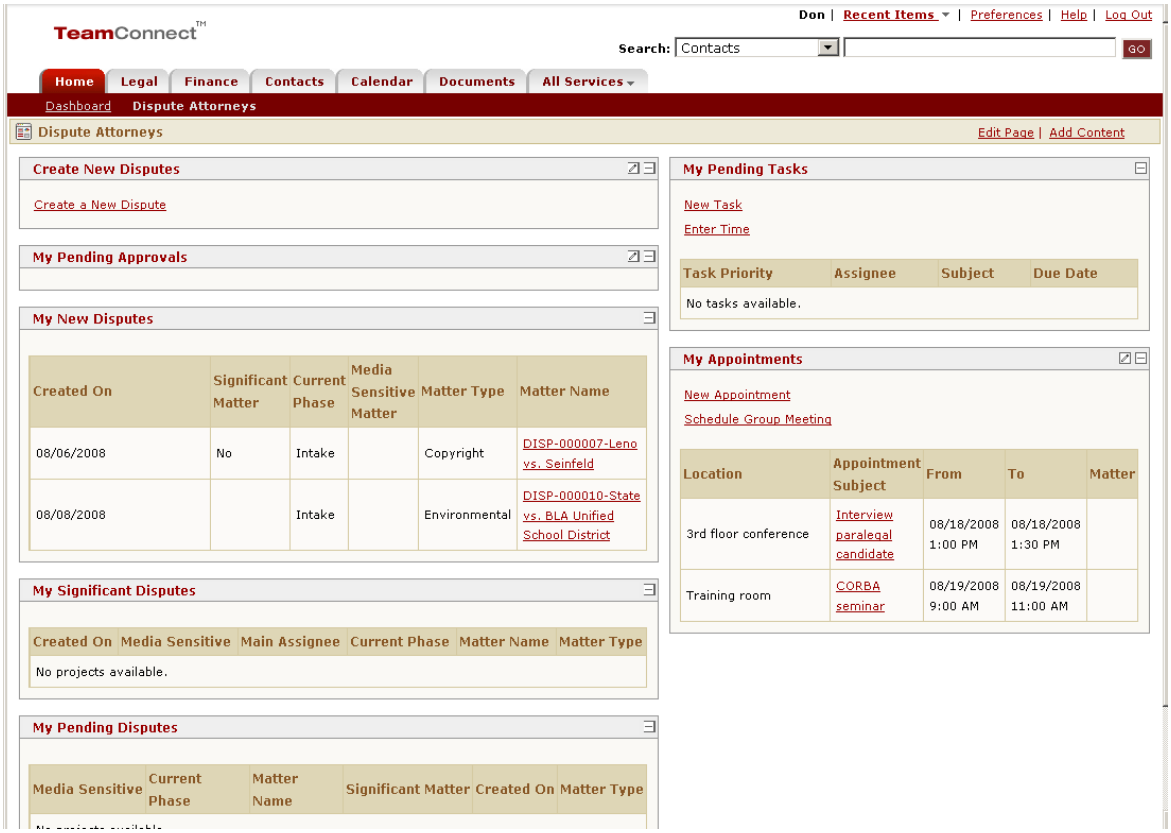
The following table provides information about how to use home pages and portal panes:

	...Home Pages	...Portal Panes
Viewing...	Working with Home Pages	Information in Portal Panes
Adding...	N/A	Adding Portal Panes to Home Pages
		Running Business Objects Reports

Editing...	Modifying Home Page Settings	Editing Portal Pane Custom Content
	Customizing Portal Pane Layout	Using Search Views in Portal Panes

1.1.6.1 Working with Home Pages

Your solution developer defines and creates portal panes and assigns them to the home pages of different user groups or to the home page of the entire organization. Depending on how many groups you belong to and how many home pages your solution developer created, you may have access to more than one home page. If such is the case, one of your home pages is set as the default and is the one that will always appear when you log in.



Home Page Example

Note: *Your home page may look different based on your company's preferences.*

Home Page Example

Component	Description
Home Pages Menu	Click the title of the home page you would like to view. The home page you are currently viewing is displayed in bold in the **Home Pages** menu.

	Note: *You may have one home page, or multiple home pages to view.*
Personalize Links	Clicking a link brings up a page where you can make changes to the home page title or you can add more portal panes to the page. For more details, see Home Pages and Portal Panes.
Personalize Icons	Clicking an icon brings up an **Edit Settings** page where you can make limited changes to the title or the layout of portal panes. For more details, see Home Pages and Portal Panes.
Portal Panes	Specialized menus from which you can access information and perform actions. Each portal pane is displayed with its own title bar and contents.
Portal Pane Content	View the displayed content or click the displayed hyperlinks to access records, web sites, tools, and other options.
Title Bars	Click the available buttons to edit and change the properties of the portal pane. For details, see Customizing Portal Pane Layout.

1.1.6.2 Information in Portal Panes

Most information and records that you can access from any of your home pages can also be accessed from the tab bar. However, home pages and portal panes provide a quicker means of doing so.

The Home Page Example image shows the different components that you may see on your home page. Some portal panes, like **Employee Messages**, contain important textual information, such as messages to employees or important announcements.

Other portal panes are more interactive. You can click hyperlinks to access saved searches, web sites and records, such as existing appointments, contacts, claims. There are also hyperlinks that open tools or record screens with blank fields so that you can create new appointments, contacts, tasks.

Certain portal panes that appear on your home page may contain hyperlinks to stocks, weather, or headline news.

Certain portal panes are designed to display search results for a specified type of record. For example, in the **My Appointments** portal pane, shown in the Home Page Example image, the records displayed are filtered according to the specified search criteria. See To use the portal pane title bar buttons for details on how to change your search criteria.

The number of displayed search results is determined by your system administrator. If the number of search results exceeds the maximum number entered, you can always click the **More** hyperlink. All of the search results are displayed on a standard search screen.

Note: *In order to use the links that do searches, you must be subscribed to the object collections that are associated with the searches. (More information about subscribing to collections is in Managing Collections.) Ordinarily this subscription is done for you automatically by the solution developers for your organization. However, if you manually unsubscribe from an object collection, then later click a search link that is associated with that collection, you will see an error message that says you must first subscribe to the collection before attempting to use the search link.*

Portal panes that contain graphic output from reports cannot "wrap" the graphic output as they can wrap text output. If the pane is too small, the graphic output is truncated. For this reason, consider the size of the graphic output when deciding how to size and place the portal pane in a home page.

1.1.6.3 Running Business Objects Reports

If your organization uses Business Objects WebIntelligence to generate reports based on the data you enter and generating reports is part of your job responsibilities, you can access WebIntelligence directly. This capability is known as single sign-on.

Requirements

Make sure the following requirements are met before you can run Business Objects reports:

- Your TeamConnect or WebIntelligence administrator has configured the single sign-on capability and has informed you that it is ready to be used.
- If your username and password combination is different for TeamConnect and WebIntelligence, make sure you enter your WebIntelligence username and password in the appropriate fields on the **Miscellaneous Settings** tab of the **Preferences** screen. For details, see Choosing Other Setting Options.
- Make sure your home page has a portal pane with hyperlinks to WebIntelligence reports.

  This portal pane can be created by your solution developer.

To access a Business Objects report

1. On your home page, find the portal pane with WebIntelligence hyperlinks to the reports that you want to generate.
2. Click the hyperlink to the report you need to access. Alternatively, click the hyperlink to the WebIntelligence home page.

   Now your WebIntelligence password is verified. You should be automatically logged in to WebIntelligence. Otherwise, one of the following may take place:

   - A dialog box appears, which requests you to enter your WebIntelligence username and password.

- An error is displayed that informs you that the single sign-on has failed. If this happens, note the information displayed on the error page.

  Important: *If you are not automatically logged in to WebIntelligence, single sign-on has failed. Check the Requirements listed above or contact your administrator.*

3. If presented with the dialog box, type your WebIntelligence username and password in the displayed dialog box and click **OK**.
4. If presented with an error, check the settings on the **Preferences** screen and try accessing the report again or click the hyperlink for the manual login. If the problem persists, contact your administrator.

1.1.6.4 Adding Portal Panes to Home Pages

You can add content to your home pages by selecting portal panes from a pre-defined list. Click the **Add Content** link in the home page, which displays the **Add Content** window.

The **Add Content** window displays all of the portal panes that are available to you to add to your home pages. You cannot create new portal panes yourself. Click the name of a portal pane, and it is added to your home page.

Add Content Window

1.1.6.5 Modifying Home Page Settings

Changes that you make to your home page will only affect your view of that home page, not the view of other users who may have access to the same home page. To better understand the relationship between your changes and the changes made by your solution developers, see About Synchronizing Home Pages and Portal Panes.

1.1.6.5.1 Page Title

You can modify your home page's title by clicking the **Edit Page** link in the home page. The current title appears in a small window and you can change it to a title of your choice. This does not change that home page's title for any other users; only for you.

1.1.6.5.2 Customizing Portal Pane Layout

You can modify the existing portal panes that appear on your home pages. The title bar of a portal pane typically provides a set of buttons that enables you to customize your portal pane.

To move a portal pane

While the cursor is inside the title bar of the portal pane, click and hold the left mouse button. Then drag the pane to another location on the home page and release the mouse button. The portal pane will appear in the new location, and other portal panes will move aside to make room for it in that location.

To use the portal pane title bar buttons

The following table describes the functionality of each of the buttons that you can select from the title bar of a portal pane.

Button	Description
Edit	If the portal pane contains custom content, and you have authority to modify that content, clicking Edit presents a page that lets you alter the parameters of that custom content. See Editing Portal Pane Custom Content.
Minimize	Click the minimize the selected portal pane on the home page. The portal pane shrinks until only its title bar, not its content, is visible.
Maximize	Click to maximize the selected portal pane. After clicking this button, the portal pane will occupy its default size.
Remove	Click to remove the selected portal pane from the home page. A confirmation window appears. If you confirm the removal, the portal pane disappears. This button will always be available in the title bar.

If you do not see the title bar buttons, or only a few buttons, then you are not allowed to change that portal pane.

Any customization made will affect only that portal pane in the home page from which you are currently working. If the same portal pane appears on more than one of your home pages and you would like to customize it across all of your home pages, you must open each home page and make the changes.

1.1.6.5.3 Using Search Views in Portal Panes

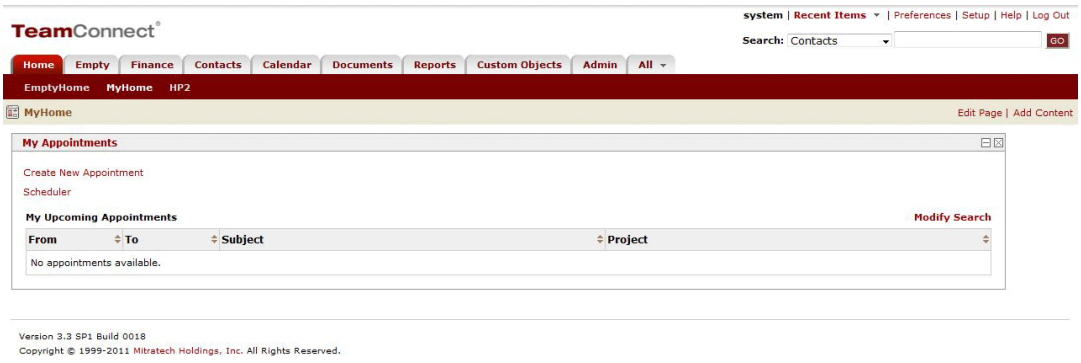
A search view in a Portal Pane lets you view information that meets selected search criteria. For example, you may have a search defined that searches for, and then displays your upcoming appointments for the next 30 days, including the time of the appointment and the name of the associated project.

You can modify the search criteria and, if necessary, reset the criteria back to the default search view.

Note: *Typically, the default search view criteria is set by an administrator. Any changes that you make are temporary and can be lost if the Home Page or Portal Pane is synchronized. See About Synchronizing Home Pages and Portal Panes for specific information.*

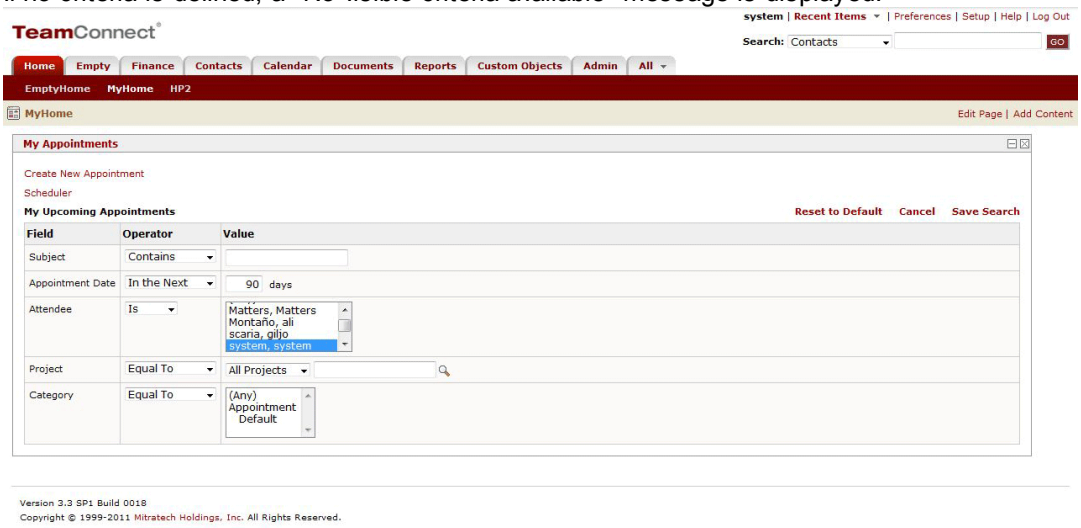
Modifying the Search View

1. In the appropriate portal pane, click the **Modify Search** link.



Modify Search Link

The search criteria screen opens in the Portal Pane and displays the current search criteria. If no criteria is defined, a "No visible criteria available" message is displayed.



Search Criteria Screen in Portal Pane

2. Make the appropriate changes and then click **Search**. You are returned to the original screen in the Portal Pane.

   Reminder: *Any changes that you make are temporary and may disappear when Home Pages and Portal Panes are synchronized.*

Resetting to the Default Search View

Click **Reset to Default**, and then click **Search**.

Canceling Changes

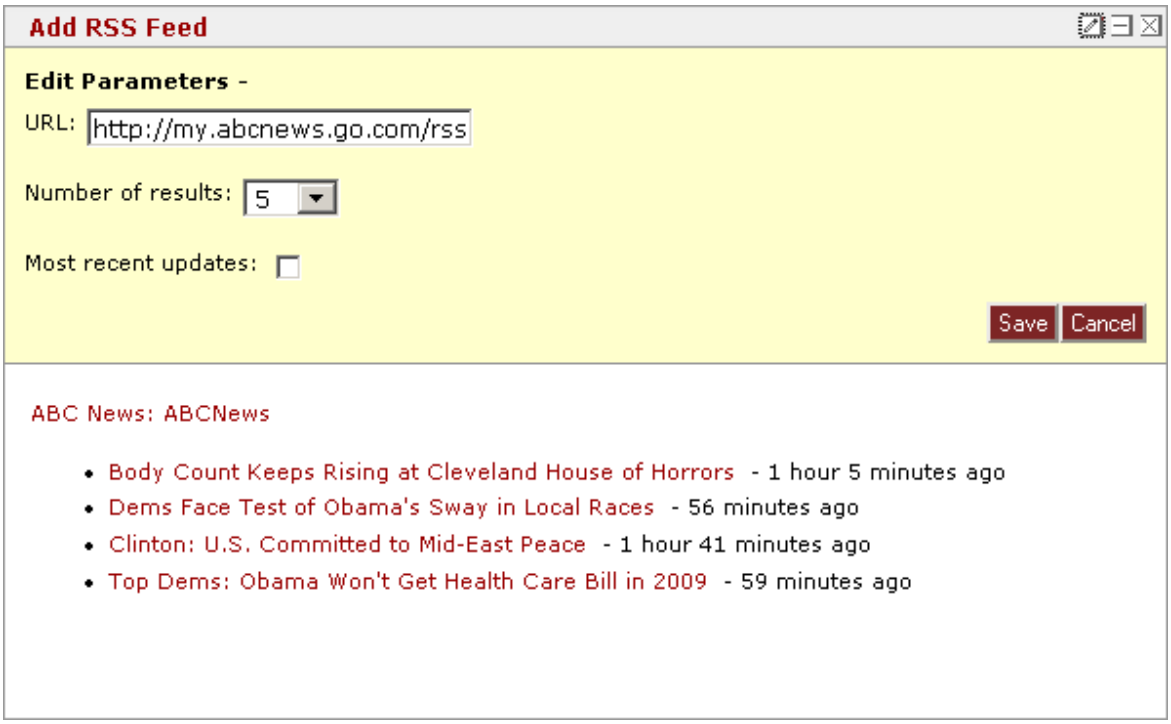
Click **Cancel** to cancel changes before saving.

1.1.6.6 Editing Portal Pane Custom Content

Custom content in portal panes sometimes has parameters that determine what data is shown. You may be able to edit those parameters. For example, for a custom content portal pane that displays weather conditions, you may be able to change parameters such as the zip code of the area for which you want weather information.

To know whether there are editable parameters in a given portal pane, look for the **Edit** button in the title bar of the portal pane. If the **Edit** button is not visible, either there are no editable parameters or you do not have permission to edit parameters.

When you click the **Edit** button, the **Edit Parameters** window displays along with varying parameter fields, as shown in the following image. The original appearance of the portal pane is shown in the lower part of the window.



Edit Custom Content Parameters Window

The parameter fields in the **Edit Parameters** window vary depending on the type of custom content portal pane your administrator created.

1. Fill in the fields that are presented.
2. Click **Save**.

3. Changes that you make to the custom content parameters take effect immediately within the portal pane.

1.1.6.7 About Synchronizing Home Pages and Portal Panes

Because you may have the ability to customize your own home pages and portal panes, a distinction must be made between the changes that you make, and those made by the administrator.

Home Page Personalization

If you have the right to personalize home pages, changes that you make to the **Page Settings** take precedence over solution developer changes.

However, if the solution developer adds portal panes to a home page, you will always see these changes. Even if you add a portal pane to a home page by clicking the **Add Content** link from the page, and then the solution developer adds the same portal pane to the same home page, you will see two of the same portal panes on the home page. If desired, you can then remove the duplicated portal pane yourself.

Portal Pane Customization

If you have the right to customize a portal pane (see Customizing Portal Pane Layout), changes you make take precedence over administrative changes.

For example, if you click the **edit** icon on a portal pane and customize that portal pane, the changes you made appear on your home page. Changes made by the solution developer to that same portal pane do not appear on your home page. In short, the moment you customize a portal pane, those changes take precedence over solution developer changes to that same portal pane. But if you do not edit a portal pane, then solution developer changes take precedence.

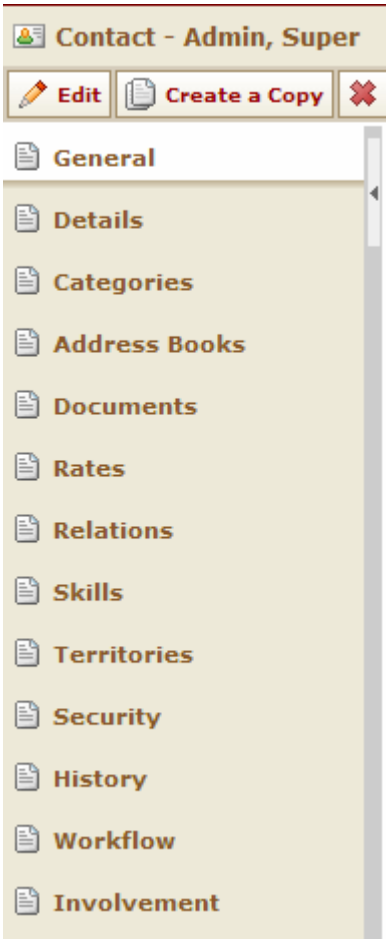
Home Page and Portal Pane Synchronization

Although you might have the ability to personalize your home pages and customize your portal panes, your administrator can overwrite those changes at anytime. Solution developers have the ability to synchronize home pages and portal panes contents when necessary. Solution developers are advised to notify users before synchronizing home pages or portal panes.

1.2 Records

Large organizations may have millions of records in their databases to store information.

A single record contains information that displays on several separate pages, shown by the links in the left pane.



Links for Each Page in the Left Pane of a Contact Record

Note: *You must have the appropriate access rights to perform certain tasks. If you don't have rights, you will not have access to the buttons, icons, or links that allow you to access part of a record. For more details about how rights work, see Working with Record Security.*

The following table shows how you can use most records.

...Records	How...
Finding	Displaying Types of Records
	Viewing Collections of Records
	Searching for Specific Records
	Sorting Information

Viewing		Using a Record in View Mode
Creating		Creating a Record
		Using Wizards
		Importing Data to Create Records
		Working with Batch Entries
Editing		Editing a Record
		Saving an Edited Record
		Copying a Record
		Reassigning Work
Adding	Categories	Setting Category Details
	Security	Working with Record Security
	History	Working with Record History
	Relations	Working with Related Records
	Documents	Working with Record Documents
	Workflow	Viewing Workflow for a Record
Deleting		Deleting Records
Printing		Printing Records

1.2.1 Displaying Types of Records

Records are categorized by record types, which handle the storage of different kinds of business information. For example, Contacts, Invoices, and Appointments are all considered record types.

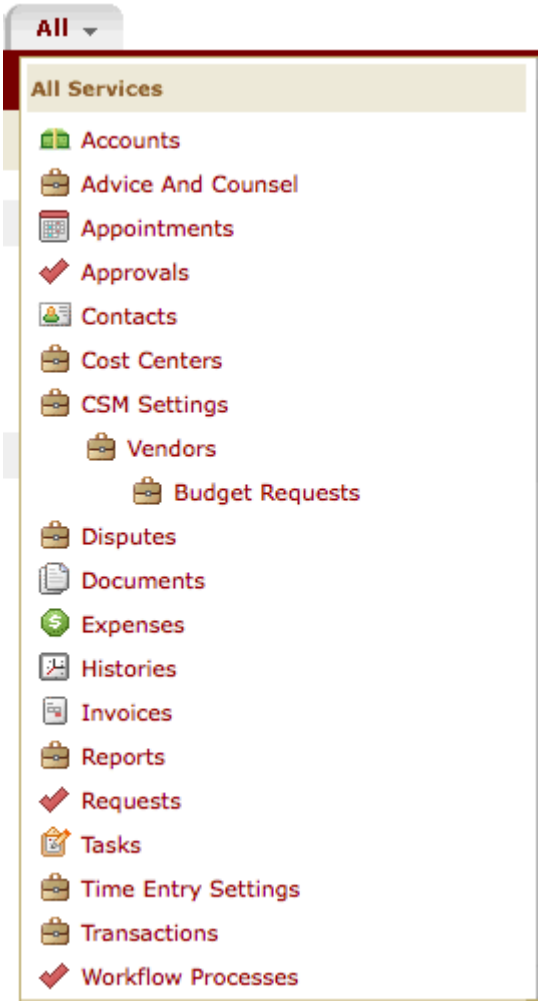
You can access record types in one of the following ways:

- Click a link on the global navigation bar—The global navigation bar shows a row of tabs that represent some of the main pages. When you click on a tab, such as **Contacts**, a page opens that lists contact records that you have the rights to view. Others, such as **Finance**, display a

group of sub-tab links just below the main tabs. Clicking one of these links takes you to a page that displays a list of the selected record type. The record list is generated from the Recently Viewed search (see Viewing Collections of Records).

Tabs and sub-tab links on the Global Navigation Bar

- Click a link from the **All** tab—The **All** tab drop-down list provides access to all the standard record types in addition to any custom record types your organization may have developed. The **All** tab also includes links to any tools and home pages to which you have access.



All Drop-down List

1.2.2 Viewing Collections of Records

A collection is a group of related records that you can view by clicking a collection link in the left pane. Use collections to access records without having to search for them.

The Contact Record Type with Many Collections

You can define many collections for a single record type. In the graphic above, all of the links in the left pane, such as Companies, People, and Leigh's address book, are collections. Each collection can use a different combination of search criteria to present a different list of records.

By default, most record types have one or more of the following collections:

- **Recently Viewed—**Displays up to 25 of the last records that you viewed, in reverse chronological sequence, over a period of 90 days. This link is always the first collection listed in the left pane, and you cannot delete this collection or change its order.
- **All** <*record type*>**—**Displays all of the records of the selected type that you have the rights to view.
- **Recently Created—**Displays a list of records of the selected type that were added to within the last 30 days.
- **Recently Modified—**Displays a list of records of the selected type that were edited within the last 30 days.

Although **Recently Viewed** is the default collection, you can click another collection during your session and that collection will be remembered for the duration of the session. For example, if you leave a record type, do work in another area, and then later return to that record type, the collection you last used for that record type will be the one that appears now.

In addition to the collections listed above, some record types also have specific collections as follows:

Specific Collections by Record Type

Record Type	Specific Collection
Calendar	**Upcoming—**Displays a list of appointments that will occur 90 days from today's date.
Invoices	• All Invoices • Not Posted • Approved • Pending • Rejected • Failed
Projects	**My Assigned—**Displays a list of the projects to which you are assigned.
Tasks	• My Pending Tasks • My Overdue Tasks • My Completed Tasks • My Billed Tasks

1.2.2.1 Managing Collections

The collections that you see in the left navigation pane are initially determined by your system administrators, but you can also affect which ones are shown by subscribing or unsubscribing to collections.

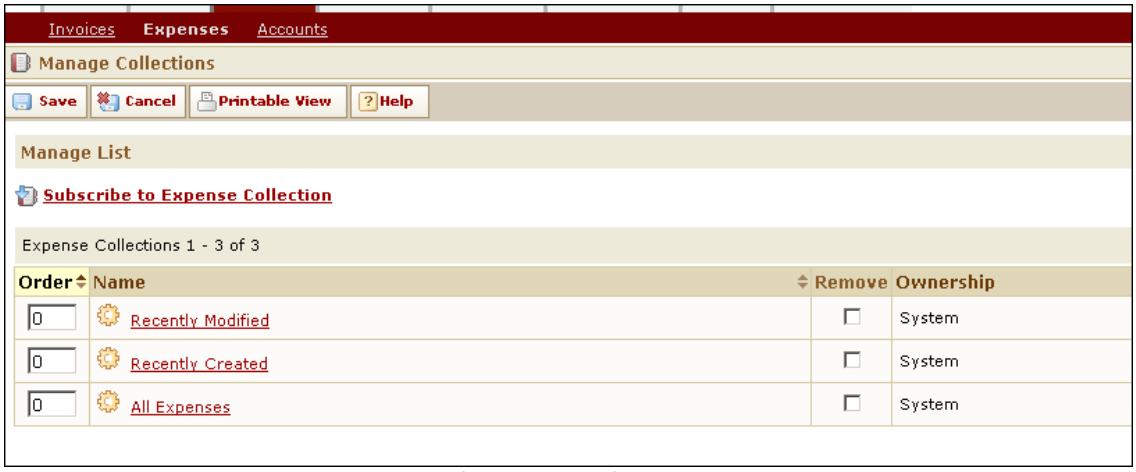
On the **Manage Collections** page, you can do the following:

- View the collections to which you currently subscribe
- Unsubscribe from a collection
- Subscribe to a collection
- Reorder the sequence of collections

To open the Manage Collections page

In the left navigation pane, click the **Manage** link.

Note: *For the Contact record type, collections may also include "Address Books". For all other record types, the term "Collections" is used. Regardless of the term, managing collections is done in the same way for all record types.*



Example of the Manage Collections Page

To subscribe to a collection

Click the link **Subscribe to <*record type*> Collection**.

To unsubscribe from a collection

Click the **Remove** check-box next to the collection that you want to delete, and then click **Update**.

To reorder the sequence of collections

1. Type sequence numbers into the **Order** field in each row. Collections with the smallest numbers will appear first in the left navigation pane. You cannot reorder the **Recently Viewed** collection—it will always appear before any other collections.

   You cannot change the order of the **Recently Viewed** collection. It is always the first collection listed.

2. Click **Update**.

Manage Collections Page

View	Description
Subscribe to <*record type*>	Click this link to open the **Subscribe to Collections** page. Select a collection on that page and click **Subscribe**.

Collection	
Order	Specifies the order, starting with 0, that you want the collections to appear on the left side. Change the numbers in the text boxes to update the order.
Name	Displays the name of the collection. Click a link to open a collection.
Remove	Select a collection to remove it from your collections list.
Ownership	Specifies the owner of the collection.

1.2.3 Searching for Specific Records

Besides the automatic Recently Viewed search that runs when you begin working with a record type, there are several other ways to search for records:

- Global Search
- Modifying a Collections Search
- Using Custom Search
- Using Search Modules

All pages that list search results also allow you to specify how many records you want to see on a single result page, by choosing a number from the "per page" drop-down list at the bottom of the results. If you choose a number during one search, your choice is remembered and used in any other searches you may run for that record type.

Note: *The actual name of this drop-down will vary depending on the record type you are viewing. For example, if you are viewing Document records, the name of the drop-down will be "Documents per page".*

If you have already run a Global Search or a Custom Search, the results of that search are available from the **Search** link, found at the bottom of the list of collections in the left pane. If you click away from your search results to a different tab or a different collection, clicking the **Search** link will restore your original search results, without the need to rerun your search.

Note: *You can export the search results into an Excel worksheet or create a .pdf document that you can open with Adobe Acrobat Reader. See Exporting a Search Results List for more information.*

To view fields with multiple values

If your search results have a field with more than 10 values, an ellipsis (...) follows the 10th value to indicate that there are more values. To view all the values in this field, click the record name

link, click the **Edit** icon, or export the search results.

Examples 1 - 1 of 1

Edit	Number	Involved Contacts
	0	Contact, A (View Involved Party Record) (Role1), Contact, B (View Involved Party Record) (Role1), Contact, C (View Involved Party Record) (Role1), Contact, D (View Involved Party Record) (Role1), Contact, E (View Involved Party Record) (Role1), Contact, F (View Involved Party Record) (Role1), Contact, G (View Involved Party Record) (Role1), Contact, H (View Involved Party Record) (Role1), Contact, I (View Involved Party Record) (Role1), Contact, J (View Involved Party Record) (Role1), ...

Field with Multiple Values

To navigate in long lists

Some lists, such as those produced by searching, might need more than one page to be displayed. In this case, a series of links will appear at the bottom of the list page. You can specify a particular page to view (for example, page 4 of 9) by clicking the page number, or you can click the left-arrow link or the right-arrow link to move from page to page.

Documents 31 - 40 of 81 — Advanced Document Search

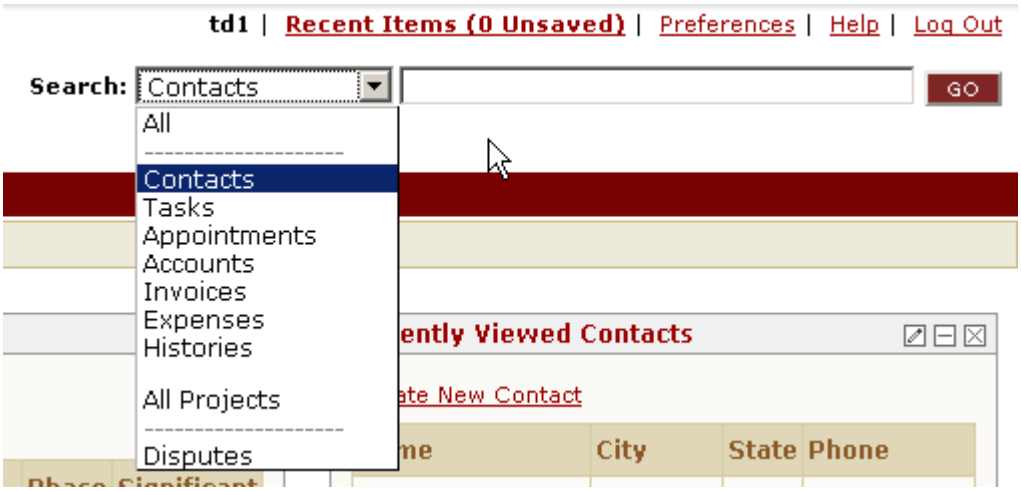
Action	Name	Category	File Size	Type	Checked Out By	Date Crea
	NTLM11_ReleaseNotes.pdf	Document	1 Bytes	Adobe Acrobat		06/04/200
	NTLMAuth_PlugIn.pdf	Second Draft	1 Bytes	Adobe Acrobat		04/10/200
	Publication Reqs. Spec for the API Guide.doc	Document	1 Bytes	Microsoft Word		08/06/200
	Publication Reqs. Spec. for the XML Layer.doc	Document	1 Bytes	Microsoft Word		08/07/200
	TC24SP1_ObjectModel.pdf	Final Draft	1 Bytes	Adobe Acrobat		02/16/200
	TC24SP1_XML_Layer.pdf	Final Draft	1 Bytes	Adobe Acrobat		02/16/200
	TC24SP3Update1_Installation.pdf	Document	1 Bytes	Adobe Acrobat		07/17/200
	TC24SP3_Installation.pdf	Document	1 Bytes	Adobe Acrobat		07/11/200
	TC24SP3_ReleaseNotes.pdf	Document	1 Bytes	Adobe Acrobat		07/02/200
	TC24SP5_Installation.pdf	Document	1 Bytes	Adobe Acrobat		02/04/200

1 2 3 4 5 6 7 8 9 — Documents per page 10

Navigation Links for Long Lists

1.2.3.1 Global Search

The global search bar allows you to search for a text string in a single record type, or in multiple record types simultaneously.



Global Search Bar

The text string that you type will be matched against records' names and identifying numbers. Matching records (where the text string is a complete match or a partial match) will be displayed. Choose which record types to search, key in some text and click **Go** to begin the search. If you want to abandon the search and return to the page you were previously viewing, click **Cancel**.

Note: *Global Search does not search Document records. For information on searching Document records, see Searching for Existing Documents.*

When you select **All** or **All Projects** in the **Search** drop-down list, TeamConnect searches the record and memo text fields listed in the Fields Searched by Global Search table. When you select a record type in the Search drop-down list, TeamConnect searches the field names listed in italics in the table.

Note: *Searching for a text string in **All** or in **All Projects** can have a performance impact, particularly in an organization with a large number of records.*

Fields Searched by Global Search

Record type	Record field searched	Memo text field searched
Account	Name All custom text fields	All memo text fields such as the **Notes** field
Appointment	Subject Location Contact of Attendee: • First Name	All memo text fields such as the **Notes** field

	• Middle Name • Last Name • Company Name All custom text fields	
Contact	First Name Middle Name Last Name Company Name ***Note:*** *Global Search searches for name fields that BEGIN with your search string, not necessarily those that CONTAIN the search string.* Driver's License Social Security or Tax ID City County Zip Code Guide No. State Street Country Phone number Email address All custom text fields	All memo text fields such as the **Notes** field
Expense	Description All custom text fields Expense contact: • First Name	All memo text fields such as the **Notes** field

	• Middle Name • Last Name • Company Name	
History	*Description* (the first 250 characters in the **Description** field) All custom text fields	All memo text fields such as the **Description** field
Invoice	Invoice Number Invoice Type Comments Description Line Item Warnings Vendor contact: • First Name • Middle Name • Last Name • Company Name All custom text fields	All memo text fields such as the **Notes** field
Involved	Contact of involved: • First Name • Middle Name • Last Name • Company Name All custom text fields	All memo text fields such as the **Notes** field
Projects (any custom object)	Name Number All custom text fields Contact of Assignee: • First Name • Middle Name	All memo text fields

	• Last Name • Company Name Contact of contact-centric records: • First Name • Middle Name • Last Name • Company Name ***Note:*** *You cannot search for an embedded project. You can only access embedded projects through the related parent project. See Embedded Projects*	
Task	Subject All custom text fields Contact of Assignee: • First Name • Middle Name • Last Name • Company Name	All memo text fields such as the **Notes** field

1.2.3.2 Modifying a Collections Search

The record(s) you are seeking might be present in a collection other than the one you are viewing. You can choose a new collection by clicking on a link in the left navigation pane of a page. Clicking a collection link will produce one of two possible pages:

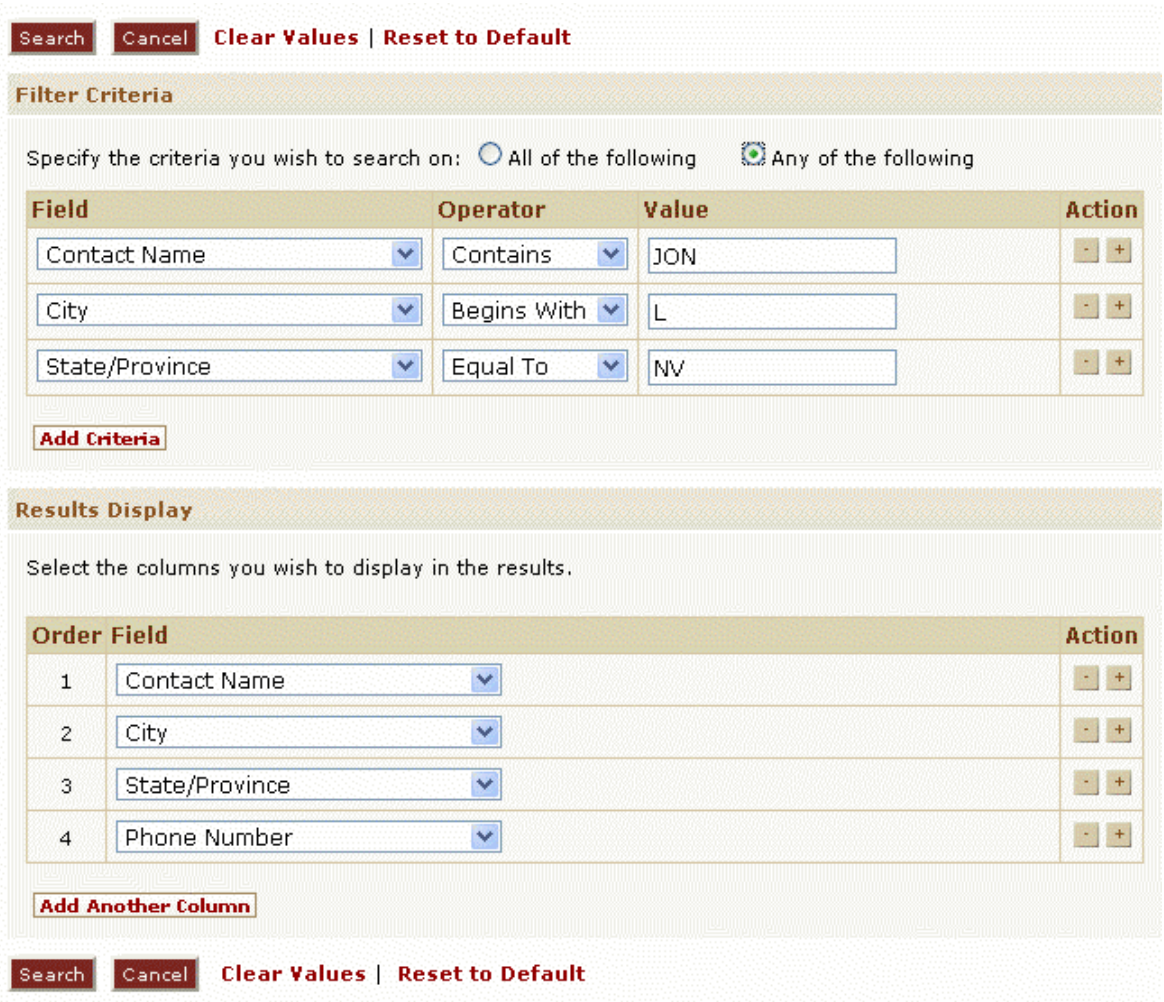
- If the collection has its "Auto-search" flag turned on, then the search is immediately executed and a search results page is shown. The search results page has a Modify Filter link which, if clicked, will show the Modify Filter page.
- If the collection has its "Auto-search" flag turned off, then the Modify Filter page appears, showing the search criteria and results columns that are associated with the collection.

From the **Modify Filter** page, you can edit the search criteria that are associated with the collection, then run the edited search. If you wish, you can save the edited search, as described in Saving the Search.

If you are viewing a list of search results, then the last link in the left navigation pane is titled **Search**. Clicking that link will re-execute your most recent search and will refresh your list of search results with the most current data.

1.2.3.3 Using Custom Search

Each record type has its own dedicated list page, which has a link for **Custom Search**. When you click **Custom Search** to get a new search screen, all of your previous modifications to criteria and result fields are discarded and a search page opens.



Custom Search for the Contact Record Type

1.2.3.3.1 Specifying Search Criteria

You specify search criteria by selecting options on the Custom Search screen. Default criteria are provided, but it is not necessary to enter values in every field. If you do not enter any values, and you clear any existing default values, then click the **Search** button, Custom Search returns all of the records in your database, which could be a very large result set. Selecting options on this screen will narrow your search results to a more manageable result set.

Note: *For custom objects, the criterion "Main Assignee" has a default value equal to the logged-in user. If you want your search to include more records than this, be sure to alter or clear this criterion.*

Filtering Criteria

There are three options for filtering your search criteria.

When you select radio button **All of the following**, every criterion that you specify must be satisfied for a record to appear in the search results. In this case, adding more criteria makes your result set narrower (smaller).

When you select **Any of the following**, a record needs to satisfy only one of the criteria to appear in search results. In this case, adding more criteria potentially makes your result set larger, increasing the time it takes to return the results.

The **Group the following** radio button combines the functions of the two previous radio buttons. When you select **Group the following**, a new **Group** column appears in the table. Search fields with the same **Group** values will only produce results if all the group's criteria are met, similar to selecting the **All of the following** radio button. Qualifying search results from each separate group (designated by matching numerical values) will all appear in the search results, similar to the **Any of the following** radio button.

Selecting Criteria

To select criteria, complete one or more of the following:

- **Group—**This column only appears if you select the **Group the following** radio button. Group your criteria together by giving them matching values, separating the groups with unique values. Group values can be numbers 1-9 only. Alphabet characters, special characters, and 0 are invalid values. There is no limit to the amount of criteria allowed in a single group.
- **Field—**Select the name of the field that you want to search. This drop-down list contains all of the field names associated with this record type.
- **Operator—**Select the option that describes the criteria that you want to use to further narrow your results, such as **Contains** or **Has Value**. See Operators for more information.
- **Value—**Enter the specific value that you want to use to return specific results, based on the Field and Operator that you selected, if available. For example, if you want to find all of the users with the last name Smith, in the Field list, select Contact Name, in the Operator list, select Contains, and in the Value field, enter Smith.

Selecting Multiple Values

For text fields, user fields, number fields, and projects, you can search using multiple values by clicking the plus sign in the **Value** area to add additional value fields. For example, if you want to find all of the projects modified by Deby Howard and Kevin Ranch, in the **Field** list, select **Modified By**, in the **Operator** list, select **Equal To**, and in the **Value** drop-down list, select a project type. Enter Howard, Deby in the first box, click the plus sign and enter Ranch, Kevin in the second box. The search results will contain all of the projects that were modified by these users.

For specific information about which Operators you can use when using multiple-value options, see Operators.

Note: *For custom objects, there is a default criterion of "Assignee" equal to the logged-in user. If you want your search to include more records than this, be sure to alter or clear this criterion.*

1.2.3.3.2 Operators

Use the information below to help you select the appropriate operators.

Text Fields

For text fields, there are several operators:

Begins With	The text string that you specify must be present at the beginning of the record's related field. Any additional text beyond that string is not considered part of the search.
Equal To	The text string that you specify must be exactly the same as the record's related field.
Not Equal To	The text string that you specify must not be the same as the record's related field.
Contains	The text string that you specify must be present somewhere in the record's related field, not necessarily at the beginning or the end.
Does Not Contain	The text string that you specify must not be present somewhere in the record's related field.
Ends With	The text string that you specify must be present at the end of the record's related field. Any additional text before that string is not considered part of the search.
Has No Value	The specified field does not contain a value. You might use the **Has No Value** operator if you are searching for records where the selected field does not contain a value, such as contact records that do not have a value in the **Social** Security field.
Has Value	The specified field contains a value. The **Has Value** operator is useful if you are searching for records where the selected field contains a value, such as contact records that provide a value in the **Job Title** field.

Before	The search will return all records that appear alphabetically before the text string that you specify.
Before (Including)	The search will return all records that appear alphabetically before the text string that you specify, including the text string that you specify.
After (Including)	The search will return all records that appear alphabetically after the text string that you specify, including the text string that you specify.
After	The search will return all records that appear alphabetically after the text string that you specify.

Note: *In all of the options above, case is ignored when testing for matching characters.*

If you are searching using multiple options in the **Value** area, you can use **Begins With**, **Ends With**, **Equal To**, and **Contains** only.

Date Fields

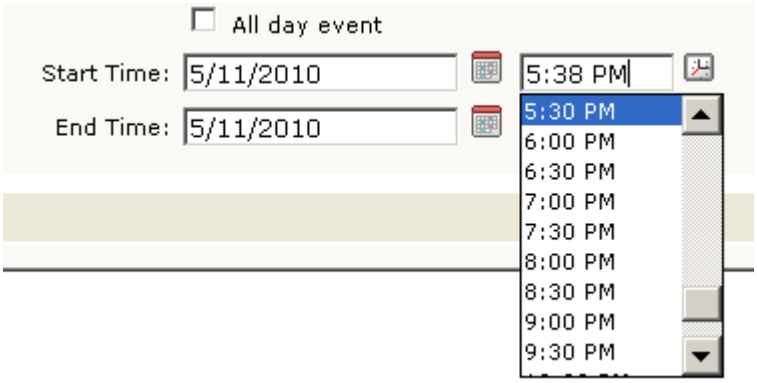
When you place the cursor inside a date field, a popup window appears so that you can select a date from the calendar.

For date fields, you can choose from several operators to search for dates:

Older Than	Days on and before the date you enter.
Newer Than	Days on and after the date you enter.
Between	A range of dates, including the dates you enter. To search for one date, you can leave one of the fields empty or use both fields for the same date.
Has No Value	The date field does not contain a value.
Has Value	The date field contains a value.

Time Fields

Time fields allow you to specify an exact time, to the minute and provides a time icon you can click to open a list of possible times of day. For convenience, you can click on an entry in the list rather than typing the time value manually.



Time Field Drop-down List

Number Fields

For number fields, there are several operators:

Equal To	The number that you specify must be exactly the same as the record's related field.
Greater Than	The number in the record's related field must be greater than the number that you specify.
Greater Than or Equal To	The number in the record's related field must be greater than, or equal to, the number that you specify.
Less Than	The number in the record's related field must be less than the number that you specify.
Less Than or Equal To	The number in the record's related field must be less than, or equal to, the number that you specify.
Between X and Y (Inclusive)	When you choose this option, a second input field appears next to the existing input field. You must type a number in the existing input field and a second, higher number in the second input field. The record's related field must have a value that lies between the two numbers that you specify, or matches one of the two numbers that you specify.
Has No Value	The specified field does not contain a value.
Has Value	The specified field contains a value.

User Fields

Equal To	The results must contain the specified users. This operator is only available if you are using multiple options in the **Value** area.
Not Equal To	The results must not contain the specified users. This operator is only available if you are using multiple options in the **Value** area.

Memo Text Fields

For Memo text boxes, you can use the **Contains**, **Has No Value**, and **Has Value** operators.

Note: *Searching memo text fields with the* ***Contains*** *operator only supports alphanumeric characters.*

List Fields

For Lists, you can use the **Is**, **Is Not**, **Has No Value**, and **Has Value** operators.

Multi-Value List Fields

For multi-value list fields, there are several operators:

Contains Any	Any of the values that you specify must be contained in the saved values of the multi-value list field.
Contains None	None of the values that you specify must be contained in the saved values of the multi-value list field.
Contains All	The full set of values that you specify must be contained in the saved values of the multi-value list field.
Does Not Contain All	The full set of values that you specify must not be contained in the saved values of the multi-value list field.
Contains Exactly	All of the values that you specify must match exactly to the saved values of the multi-value list field.
Does Not Contain Exactly	All of the values that you specify must match exactly to the values that are not saved in the multi-value list field.
Has Value	The specified multi-value list field contains a value.
Has No Value	The specified multi-value list field does not contain a value.

Project Fields

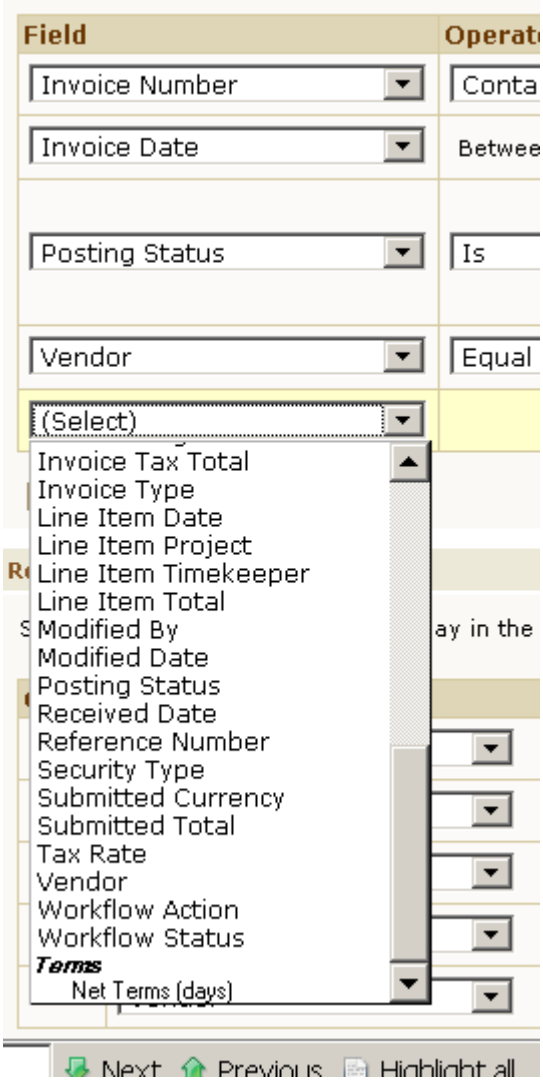
For Projects, you can use the **Equal To**, **Not Equal To**, **Has No Value**, and **Has Value** operators. If you search using multiple value criteria, you can use the **Equal To** operator only.

Object Fields

For object fields, you can use the **Equal To**, **Not Equal To**, **Has No Value**, and **Has Value** operators.

1.2.3.3.3 Adding Additional Fields

If you want to use a criterion that isn't already visible as part of the default, click the link **Add Criteria**. An extra row is added to the criteria section, and a drop-down in that row lets you choose a criterion from a list of all possible criteria for this record type. The drop-down is organized with all the system fields at the top of the list, and all the custom fields at the bottom of the list. The custom fields are grouped by category, and each category displays its title above its custom fields. In the example below, the Invoice record type has a **Terms** category, with a detail **Net Terms (days)** in that category.



Custom Fields Drop-down List

If you don't want to use a criterion, you can remove it using the "minus" icon at the right of the criterion's row. Or you can simply not enter a value for that criterion, and it will be ignored when the search is run.

Note: *If you enter invalid data in a search criterion field (such as entering text characters in a numeric field), an error message is generated after you click* ***Search****.*

The values that you type in the Custom Search page are used to filter the search results. Search is flexible, and can do more than look for a simple equality between your values and a record's values. Listed below are the possible types of matches.

Links to other records

You can search based on a record's link to another related record. For example, you can search for Invoice records that have a specific Timekeeper value in a Line Item record, or that do not have that

specific value. "Equal To" and "Not Equal To" are the only possible choices in drop-down lists for such links.

Other Criterion Features

You can erase all the criterion values that you have entered by clicking the link **Clear Values**.

You can restore the list of criteria to their default values by clicking the link **Reset to Default**. This will also reset any changes that you have made to results columns, which are described in the next topic.

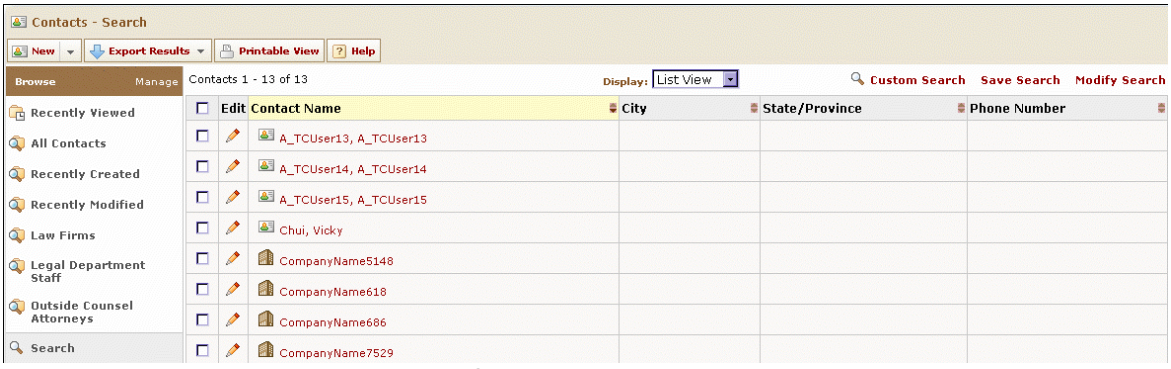
1.2.3.3.4 Specifying Results Columns

By default, Custom Search shows you a list of fields that will be present in the search results list display. The first entry shown will appear on the left of the search results list display; the last entry shown will appear on the right. You can modify this list:

- Change the names that appear in the "Field" drop-down lists. In this way you can, for example, include the same fields as the default but in a different order, left to right.
- Remove a field from the search results list display using the "minus" icon to the right of the field name.
- If you remove a field you were using to sort information, the search results continue to sort in the original order, minus the removed column. See Multi-column Sort.
- Put a new field in the search results list display. Do this by clicking the link **Add Another Column** or by clicking the "plus" icon to the right of a field name. A new row appears in the Column Display section for the search definition. A drop-down list in that row lets you choose which of all possible fields, for the current record type, should be used as a search results field. System fields appear first, followed by custom fields, which are grouped by category.

1.2.3.3.5 Executing the Search

Click the **Search** button to run the search using the criteria and display your results.



Search Results Page

Note: *If your search produces no results, a* ***Modify Search*** *link appears. Click this link to revise your search criteria.*

The **Search** link in the left pane also executes the search that you have just created and displays a list of results that meet the current criteria. This link executes the search for the duration of your session, unless you change the search criteria for the record type. Click **Custom Search** to change the search criteria.

1.2.3.3.6 Saving the Search

When you save a search, you are saving the search's criteria, sorting information, and results display layout.

If you frequently search within a record type using a set of specific criteria, you can speed up your work by saving your search and giving a name to the saved search. That name will appear as a link in the left pane of the page, in the collections list.

A search can't be saved until it has been executed. After the search results are displayed, click the Save Search link.

- A suggested name is displayed; you can edit the name if you wish.
- Check-box Display Results Automatically, when checked, will cause the search to be executed immediately whenever you click on its name in the link in the left pane. If the box is not checked, the search criteria will be displayed instead, giving you an opportunity to review or modify the search before you execute it.

When you click Save Search, your custom search is saved and its name appears in the left pane. If a search already existed with that name, it is overwritten by the one you just saved.

Later you can re-run the saved search simply by clicking its name in the link in the left pane. Each time you click on the link in the left pane, the search criteria are freshly evaluated and the most current results will be displayed when the search executes.

Note: *When you save a search, you are not saving the list that the search results return. If you want to save the list of search results as a .pdf or an Excel worksheet, use the Export Results feature, as described in* *Exporting a Search Results List**.*

1.2.3.4 Using Search Modules

You can search for a record while editing a record, if the record being edited displays a search module. For example, when editing a Contact record of type Person, a search module for Company is displayed. Clicking the **Search** icon invokes a search window that shows Contact records of type Company.

Click the name of a record that is displayed by a search module to select that record and link it to the record that you were editing, and to close the search module window.

Some search modules have a special feature: **auto-suggest**. After you have typed a few characters of text into the name field, even before you click the Search icon, a list of up to ten records with names that match the text is displayed next to the module. You can click an entry in the list to choose that record. Record types that use auto-suggest include Contact, Account, User, and Project.

Note: *Auto-suggest is only a convenience feature, not a comprehensive search. It lists up to a maximum of ten records, even if there are more than ten records that match the characters*

*that you typed. Typing additional characters will narrow your search and improve the relevance of the displayed list. Also, the sequence in which those ten records are displayed may differ from the sequence shown if you click the **Search** icon. Clicking the **Search** icon will return all results, not just ten.*

1.2.3.5 Exporting a Search Results List

You can export information from a search results list to an Excel spreadsheet or create a .pdf file that you can open with Adobe Reader. The exported results include the headings, columns, and contents.

Additionally, you can export a list of the contents in a Documents folder. See Exporting a List of Documents in a Folder for more information.

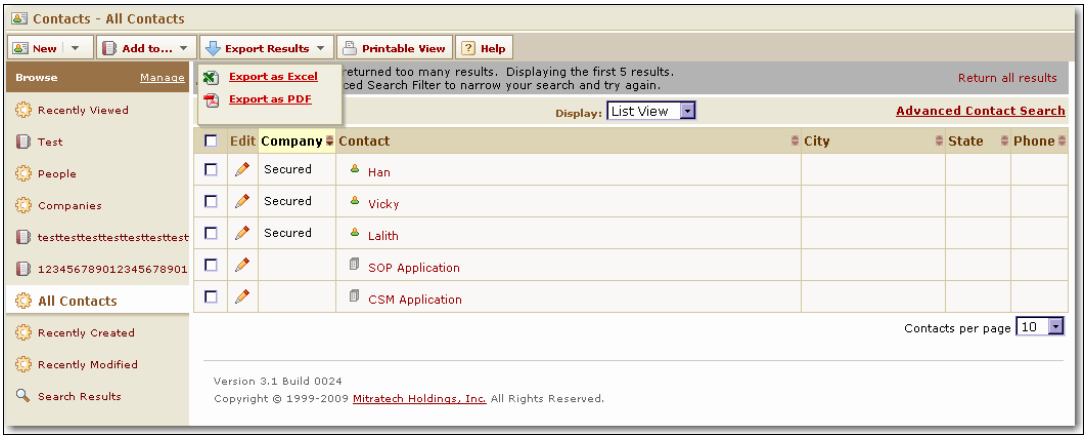
To export a search results list

1. Click the tab for the appropriate object.
2. If necessary, click the appropriate link under the tab bar.

   The list view opens for the selected record type.
3. Select one of the following options:
   - In the record list view, click the **Custom Search** link, enter your search criteria, and then click **search**.
   - Click a collection link in the left pane, click **Custom Search**, enter your search criteria, and then click **search**.

   The results appear in a list view.
4. Click **Export Results**, and then select one of the following options:
   - Export as Excel
   - Export as PDF

   When you export search results that have fields with multiple values, the Excel spreadsheet or .pdf file displays all values, not just the first 10.



Export Results Drop-down Menu

5. When the File Download window opens, select one of the following options:
   - **Save—**Saves the file to the selected location without opening it.
   - **Open—**Immediately opens the file in the appropriate application.

   If you select this option, you must save this file if you want to access it later.

   If you are exporting localized text for Chinese, Japanese, or Korean, you must have the appropriate font packs installed for Adobe Reader. If you do not have the font packs, when you try to open the .pdf, a message appears prompting you to go to the Adobe site and download them. Once you download and install the appropriate font packs, you can view the .pdf in your preferred language.

1.2.4 Sorting Information

You can sort information in most list views, document lists, and groups of line items on an invoice. You can sort a list of records by a single column in ascending or descending order, or you can select columns by which to sort the information.

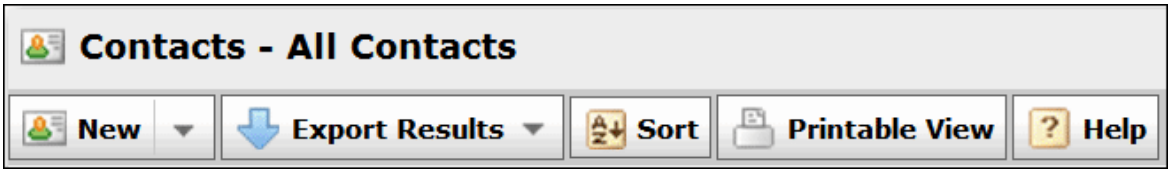
Note: *In a few places the list is pre-sorted and cannot be altered by clicking on column headers. Such places include the workflow displays (Active Requests, Completed Requests, etc.) for various record types.*

If you want to preserve the sorted information, export the search results to a different format. The sorted information only lasts until you close the page. Once you close a page, the information reverts to its default order. See Exporting a Search Results List for more information.

1.2.4.1 Single-column Sort

You can sort the list of records into ascending or descending order by clicking on the header or arrows for a column. The list is sorted by the information in that column only.

Note: *As an alternative to clicking, you may use the Tab key to navigate to a column header, then press Enter to sort.*



List View - Single Column Sort

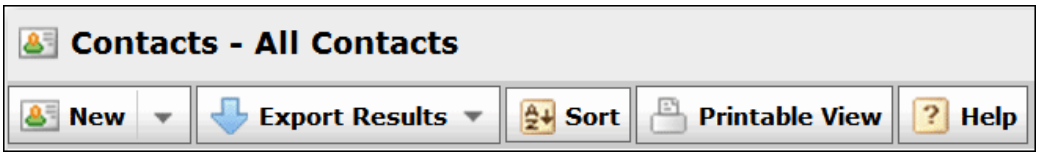
1.2.4.2 Multi-column Sort

You can also sort by up to five columns on the same page.

For example, for a large group of line items on an invoice, you can execute a search that groups all Fees and Expenses together, and then sort the associated Codes in alphabetical order.

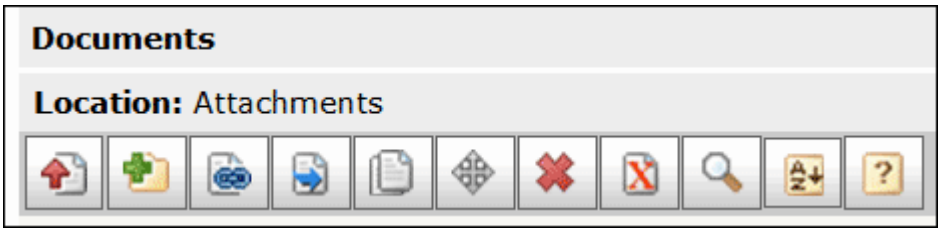
To sort by multiple columns

1. Open the record or page that contains the information that you want to sort.
2. Select one of the following options:
   - **Sorting a list view**—To sort a list view, click the **Sort** button on the toolbar.



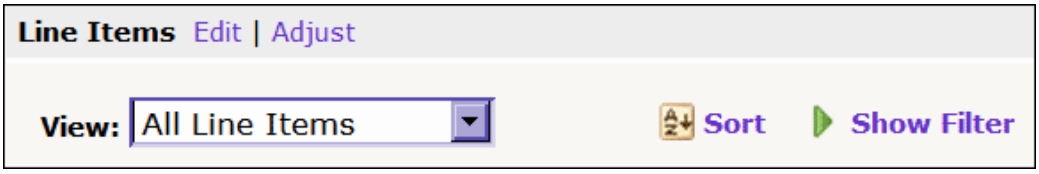
List View - Sort Button

   - **Sorting a documents list**—To sort a **Documents** page for a record, open a record, and then click the **Documents** link in the left pane. Click the **Sort** button on the icon bar. This icon is available in View and Edit mode.



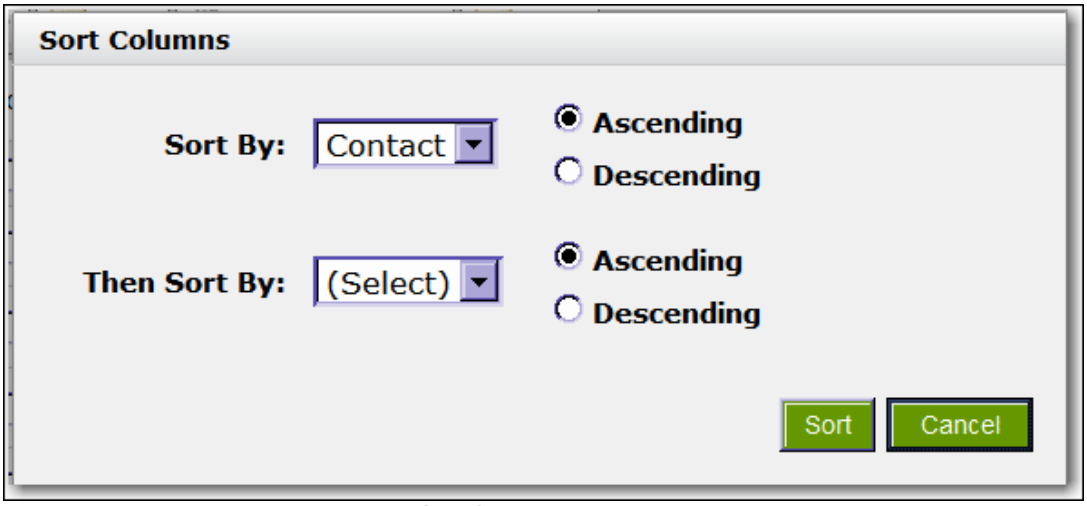
Documents Page for a Record - Sort Button

   - **Sorting invoice line items**—To sort a list of invoice line items, click the **Sort** button in the **Line Items** section.



Invoice General Page - Sort Button for Invoice Line Items

Regardless of the button or icon you select, the **Sort Columns** window opens.



Sort Columns Window

3. In the **Sort By** drop-down list, select the first column by which you want to sort information, and then click **Ascending** or **Descending** for the selected column.
4. In the **Then Sort By** drop-down list, select the second column by which you want to sort information, and then select **Ascending** or **Descending** for the selected column.
5. Repeat Step 4 for up to five columns.

   You cannot sort spanned columns and they are not available as options in the sort drop-down lists. Spanned columns appear as horizontal rows in the results display.
6. Click **Sort**.

   You are returned to the original page and the information is sorted based on your column selections. Unless you save the search, the sorted information lasts until you log out.

   When you perform a sort, the layout of the page does not change; only the order of the information in the selected columns. If you save the search, then you remove a sorted column from the search results display, the search results continue to sort in the order you specified, minus the removed column. See Saving the Search.

1.2.5 Using a Record in View Mode

To open a record, click on the link that shows the record name.

Hyperlinks to Specific Contact Records

Most records have a toolbar, title bar, and access information.

Using the Record Toolbar

All record screens typically have a separate toolbar with a set of buttons that allow you to edit, modify, copy, and delete the selected record.

The General Page for a Contact Record

The Record Page Toolbar Buttons table explains the functionality of each button. There are, however, a few key points that you should know about all of these buttons:

- The buttons that you see are controlled by the rights you have to the selected record type.

  For example, if you do not see the **Delete** button in an Appointment record, this means that you do not have the right to delete Appointment records in general or in this specific record.

- The current state of a record may prevent you from seeing some buttons.

  For example, you do not see the **Delete** button in an Expense record that was posted to an Account. Or you are unable to edit a record if it, or its parent project, is pending approval and the approval rule prevents anyone from modifying the record.

- Regardless of your access rights to the record, you always see the **Printable View** button on the toolbar.

- If you have the rights to create new records, you always have the **Create a Copy** button available in all records, except projects. In projects, access to this button is controlled by your administrator.

- Embedded projects have two separate buttons, **OK** and **Cancel**.

Record Page Toolbar Buttons

Button text	Description
Save **Save & Close** **Save & View** **Save & New**	Saves the current record and may take additional action after the save. For more details, see Saving an Edited Record.
Cancel **Cancel & Close** **Cancel & View**	**Cancel**—Cancels and returns to the previous page if you are creating a new record or creating a new Contact record on a search page. **Cancel & Close**—In edit mode, cancels all record changes and returns the user to the previous screen. **Cancel & View**—In edit mode, cancels the record changes and returns the user to view mode.
Create a Copy	Click this button to create a copy of the currently open record. See Copying a Record.
Share	Click this button to bring up a window that provides a document URL link that you can copy, and then paste into an email message or other document. For more information, see Sharing Documents using Email.
Printable View	Opens a print preview of the current page. See Printing Records.
Delete	Removes the currently open record from the database. See Deleting Records.
Edit	Opens a record in edit mode so that you can make changes. See Editing a Record.
OK	Saves the open project or the changes you made to it. This button is available only in embedded project records. ***Important:*** *You must also save the parent project to save the changes made to the embedded project.*

Using the Title Bar

Title Bar for a Contact Record

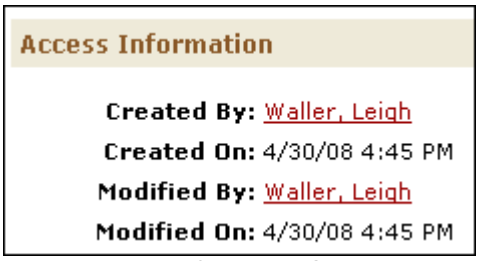
In each record page, its title bar displays the following information:

- Record type and its icon, followed by a hyphen.
- Name of the record (depending on the records type, it may the record's subject or description).
- A "Back to" link. For example, if you are viewing a Contact record, there will be a link, **Back to Contacts**, in the title bar.

  If you click the **Back to** link, the record page is replaced by a page that displays records from the most recently used list for this object type.

Access Information

Each record displays access information, usually on its General page. This information tells you who created the record and who most recently changed the record. The information is read-only.



Access Information Section

1.2.6 Creating a Record

You can create a new record from a list view or from an open record that provides an option to create a new record.

List View

To create a new record in list view, click the **New** button in the button bar.

Locating the New Button on the Toolbar

Click the New Button for a Contact Record

In many cases, clicking **New** will immediately take you to a new page. In some cases, such as the Contact record type shown above,you may need to make a further selection from a list to indicate what kind of record you wish to create, such as a wizard.

Note: *The* ***New*** *options that you see depend on your company policy. For example, some companies only allow you to create new records using a wizard, so that will be the only available option.*

Open Record

Search for a specific record, and then click the **New** button

next to the Search icon, if it is available.

When you create a new record, you are shown pages that contain fields that you can edit. The details of editing these fields are discussed in Editing a Record.

For new records of any record type, the **History** and **Documents** links in the left pane are disabled until the record is saved for the first time. After that, **History** and **Documents** are accessible. Similarly, the **Address Books** link for a new **Contact** record is disabled until the **Contact** is saved for the first time.

1.2.6.1 Wizards

A Wizard is a utility that displays a set of pages to guide you through the process of entering the information that is necessary to create a valid record.

For example, the **Scheduler** wizard can guide you through the steps necessary to create an appointment record. On predefined pages, you can specify the time of the appointment, add attendees, and then add resources for the event. This is the only default wizard.

All other wizards are created for your organization based on your business practices and procedures. For example, a matter wizard for a legal department might be designed to help you collect and enter information regarding a legal transaction.

Opening a Wizard

A wizard may be one of the available options to add a new record or the only option. If a wizard is your only option, it opens immediately when you click the **New** button. If several wizards are available, click the **New** button, and then select the appropriate wizard from the drop-down list.

Using a Wizard

To advance through a wizard, complete the appropriate fields on the first page, and then click **Next** to advance to the second page. The next page that you see depends on the options that you select on the previous page. On each page, complete the appropriate fields, and then click **Next** to advance to the next page. If you make a mistake, or need to change an option on a previous page, click **Back** to go back to the appropriate page. If you advance to the final page of the wizard, click **Finish** to save the record.

If available, any wizard page may include a **Finish** button that allows you to stop and save the wizard before the final page. Once the record is saved, you can go back and add additional information at any time.

Important: *When you are using a wizard, do not use the browser's **Back** or **Forward** buttons. Instead, use the buttons in the wizard's toolbar (**Next**, **Back**, **Cancel**, and **Finish**) to navigate through the wizard.*

You can also use the links in the left pane to advance through the wizard. When you open a wizard, the left pane displays all of the wizard pages in the correct order. The wizard pages that you can access in the left pane also depend on the selections that you make on a previous page.

Note: *If you use the left pane to advance through the wizard, it is recommended that you complete each page in order.*

1.2.6.2 Editing a Record

Editing a record is the process of changing the current values or entering additional values into a saved record.

To edit a record

1. Select one of the following:
   - When viewing a record, click the **Edit** button in the button bar.
   - When viewing a record, click any **Edit** link in any section on that record's page.
   - When viewing a list of records, click the **Edit** icon next to the record you wish to edit.
2. Edit the appropriate fields. See Working with Different Types of Fields.
3. Select a save option, as described in Saving an Edited Record.

1.2.6.3 Editing Multiple Records

In cases where you need to edit multiple records at a time, use the Mass Edit feature. This feature allows you to update the fields that appear in the results display of a search view page in multiple records at a time.

To edit multiple records

1. Select one of the following:
   - Navigate to an existing search view page (e.g. Recently Created, Recently Modified, a saved search) for the record type you want to mass edit.
   - Perform a new Custom Search for the record type you want to mass edit. The Results Display options you define in your Custom Search will dictate which fields are available on the Mass Edit page. See Using Custom Search.
2. When viewing the search results, click the **Mass Edit**

button. ***Note:*** *Users can only Mass Edit parent category. Relations and Categories fields cannot be changed via mass edit.*
3. Select the check-boxes of the records you want to mass edit.
4. In the Mass Edit table, enter the following items:
   - In the **Field** column, select the field that you want to mass edit. The available fields are dictated by the results display of the originating search view page. See Specifying Results Columns.
   - In the **Operator** column, select the operation to perform on the data contained within the record. If only one operator is available, this drop-down list will be grayed out and not interactive. See Supported Field Types and Operators.
   - In the **Value** column, enter the new data to be applied to the selected records. When using the Replace operator with Assignees, the Value column will contain two data fields. See Supported Field Types and Operators.
5. Click the **Update** button. Your changes will be applied to all selected records on the Mass Edit page.
   You can also edit individual records directly in the record list.
6. Click the **Save & Close** button.

Important: *Your changes are* ***not*** *permanently saved in the edited records until you click the* ***Save & Close*** *button!*

The table below displays the field types and operators that are supported for mass editing:

Supported Field Types and Operators

Field Type	Operators	Description
Main Assignee	• **Replace**	The **Replace** operator replaces the Main Assignee in the selected records with the selected **User** and **Role**.
Assignees	• **Replace** • **Add/Assign** • **Unassign**	The **Replace** operator deactivates the selected **Current Assignee** and adds the selected **New Assignee** as an Assignee on the selected records. If the selected **Current Assignee** is the Main Assignee, then the selected **New Assignee** will become the new Main Assignee.
		The **Add/Assign** operator adds or assigns the selected user as an Assignee to the selected records. Selecting the **Primary Assignee** check-box will also designate the **New Assignee** as the main assignee on the selected records.
		The **Unassign** operator unassigns the selected user as an Assignee from the selected records. This operator will skip records where the selected **Current Assignee** is the Main Assignee.
Involved	• **Add New** • **Set Existing** • **Remove**	The **Add New** operator adds the selected **Contact** in the selected **Role** as an Involved Party on the selected records.
		The **Set Existing** operator changes the **Role** of the selected **Contact** on the selected records. If the selected **Contact** is not an Involved Party on the selected records, no changes will be made.
		The **Remove** operator removes the selected **Contact** in the selected **Role** as an Involved Party on the selected records.
Boolean	• **Replace**	The **Replace** operator replaces the Boolean value in the selected records with the new designated value.
Text	• **Replace**	The **Replace** operator replaces the text in the selected records with the new designated text.

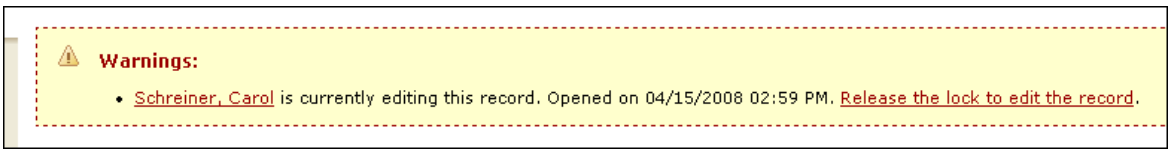
Numeric	• **Replace** • **Adjust Amount**	The **Replace** operator replaces the numeric value in the selected records with the new designated value.
		The **Adjust Amount** operator adds the designated numeric value to the value in the selected records. You can subtract an amount by designating a negative numeric value.
Date	• **Replace**	The **Replace** operator replaces the date in the selected records with the new designated date.
Memo	• **Replace** • **Add To End**	The **Replace** operator replaces the memo text in the selected records with the new designated text.
		The **Add To End** operator appends the new designated text to the end of the existing memo text, starting on a new line, in the selected records.
Lists	• **Replace**	The **Replace** operator replaces the list in the selected records with the new designated list.

1.2.6.4 Record Locking During Editing

The system administrator can enable or disable record locking. If record locking is enabled, when you edit a record, it is automatically locked to prevent changes by others while you are editing it. If another user who has editing rights to that record brings up a list that includes that record, they will see a lock icon displayed next to it.

Record locks can last indefinitely, or can expire after a specified time interval. This expiration interval is determined by your system administrators.

It is possible to override a record lock, if you have been given rights to do so. Click on the record name link, and you see an warning message like the one shown below. If you wish to edit the record yourself, click the link that says Release the lock to edit the record.



Example of Overriding a Record Lock

If you override a record lock and then edit and save the record, the person who was originally editing that record will receive a warning message. If they still need to edit the record, they should examine its information carefully, since their original work may have been overwritten by your edits.

Note: *When administrators disable record locking, multiple users can edit the same record simultaneously. However, only the user who first attempts to save the record can save it*

successfully. When the other users attempt to save, they will see a warning message that tells them that their save failed.

1.2.6.5 Working with Different Types of Fields

There are several types of fields:

- check-box
- Date Field
- List Fields
- Memo Text
- Number
- Option Buttons
- Text

When a field is **required**, you must make an entry in it before saving the record. Required fields are indicated by a bold label and an asterisk at the beginning of the label.

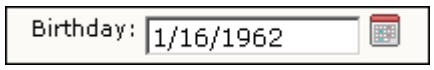
1.2.6.5.1 check-box

Use a check to turn an option on or off. When the option is on, a check mark appears in the box. To select or clear a check-box, click inside it with the mouse, or navigate to it with the keyboard and press SPACEBAR. You can check multiple check-boxes as appropriate.

Edit mode	Read-only mode
	(not applicable)

1.2.6.5.2 Date Field

Use date fields to store and display dates in the format specified in your user preferences (see Selecting Region, Date, and Time Formats).

Edit mode	Read-only mode
	**Birthday:** 1/16/62

In date fields, you can do either of the following:

- Manually type the date in the accepted format. This method may be faster when entering dates that are in the past or distant future. You can copy and paste data, if necessary. A calendar window pops up, but does not interfere with your manual data entry.

- Put the cursor in the date field to automatically open the **Calendar** pop-up window and select the necessary date in the pop-up window.

Calendar Pop-up Window

To select a date in a pop-up calendar:

1. Use the left or right arrow controls to set the desired month and year. The double arrows move by one year per click, and the single arrows move by one month per click.
2. Select the desired day on the screen.

   After you select the day, the **Calendar** window closes.

1.2.6.5.3 Time Zone Independent Date Fields

Depending on each object setting, date fields can be one of the following:

- **Time zone dependent**—Converts dates entered by other users to your time zone. If you enter a date in a time zone dependent date field and a user from a different time zone views the date, the date will be converted to that user's time zone.
- **Time zone independent**—Dates entered by another user are not converted according to time zone, regardless of your time zone setting. This means that dates should show up "as is", regardless of a user's Time Zone.

Some System Date fields will also be set to be Time Zone Independent by default.

1.2.6.5.4 List Fields

You can display list items in the following ways:

- Drop-down List
- List Box

1.2.6.5.5 Drop-dow n List

A drop-down list is a field where you click the arrow on the right or press the DOWN ARROW key and choose an item in the resulting list. You can make only one selection in a drop-down list.

If items in a drop-down list are hierarchically related to each other, these relations are indicated by the appropriate indentation and a colon between the items.

The advantage of drop-down lists is that you can see all available items and can make your selection quickly. However, if you have a large number of items, you have to scroll up and down a long list making sure to select the correct item.

Edit mode	Read-only mode
	Business: 2324 Alvarado Blvd.

As you can see, in read-only mode, a drop-down list presents its value as a simple field or background text. There is no indication that it is actually a list.

To find the necessary item in a drop-down list

1. Click the drop-down list or navigate to it using the keyboard.
2. Type the first letter of the item (or the first digit for numbers).
3. To go further down in the list of words starting with the selected character, keep pressing that key.

   When you reach the end of the list of the words starting with the selected character, the first word in the list is selected again.

Important: *This technique does not work for the items displayed with spaces at the beginning of the item text (indented items).*

Points to Remember

- To open the list, click or tab to the drop-down list.
- To select the necessary option, click the item or use the arrow keys.

  If there is an adjacent command button next to the drop-down list, you must click the button or navigate to it and press ENTER to complete the selection.
- In long lists, you can scroll up and down the list.

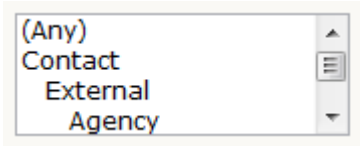
Important: *For full keyboard accessibility in drop-down lists, you must enable Accessible Mode. For more details, refer to Enabling Accessibility Mode.*

- In Accessible mode, use the arrow keys to select an option, press the TAB key to navigate to the **go** button, then press ENTER to make your selection.

- Categories or lookup table items in a list that are displayed in gray are inactive. If accessibility settings are enabled, **(inactive)** is added to the item name and they are not displayed in gray.
- Inactivated items must not be added to records, so they are not displayed in lists that are used to add items to records. If a category or lookup table item that you are familiar with is not displayed in a list, it may have been inactivated.
- If search screens include category lists or lookup tables for the type of record, any inactive items are displayed in gray. You can select these items to search for records that had the item selected before it was inactivated.
- If an inactive item was added to the record before it was made inactive, you can save the record without changing the item's value. If you accidentally change the value and save the record, you cannot restore the inactive value to the record, but you can contact your administrator to temporarily activate the needed item.

1.2.6.5.6 List Box

List boxes allow you to simultaneously select one or more items. List boxes are only available in search screens and in some wizards. It is also known as a "multi-select" list.

Edit mode	Read-only mode
	Not applicable

To make a single selection

Select the item in the list using a mouse or keyboard arrow keys.

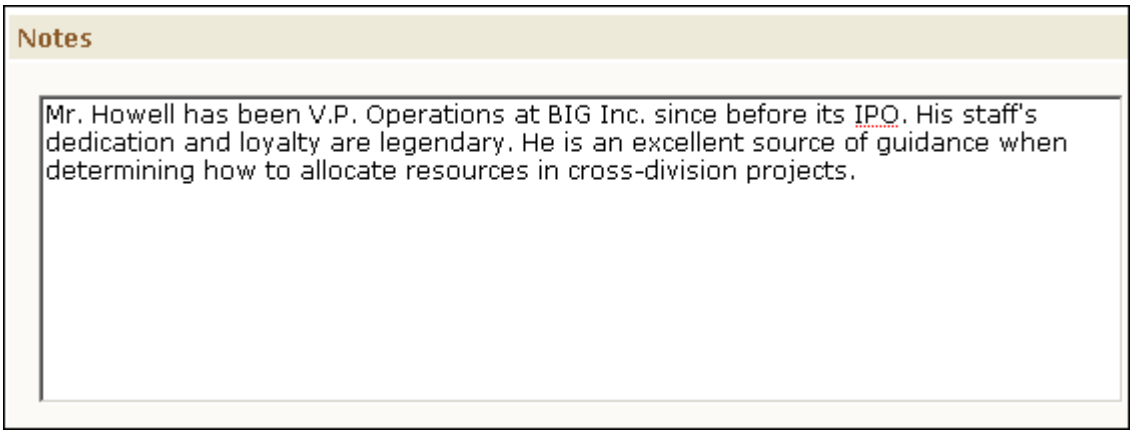
To make multiple selections

- Select the first item, press and hold the SHIFT key, and use the keyboard arrow keys or a mouse to select several consecutive items in the list.
- Press and hold the CTRL key and click on the desired items. If you prefer to use a keyboard, press SHIFT+F8 to activate the multiple select capability, use the arrow keys to move to items, and press SPACEBAR to select several random items in the list.

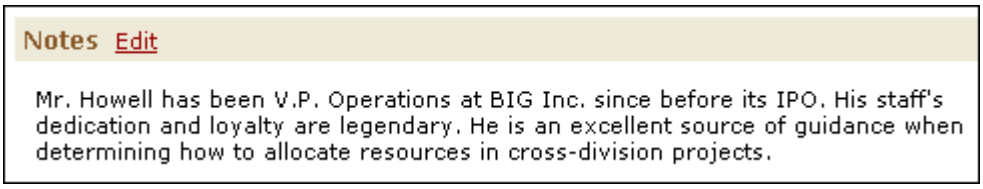
1.2.6.5.7 Memo Text

Memo Text fields allow you to type large amounts of plain text.

Edit mode:



Read-only mode:



If you copy and paste the necessary text from other word processing applications, you lose the formatting, including bullets, numbers, and indentations.

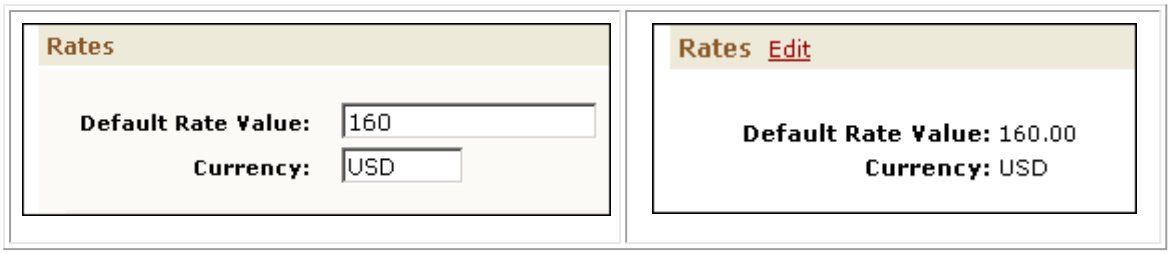
Note: *In the unusual case that you enter 250 characters or more, without any embedded spaces, into a Memo Text field, the web browser might try to word-wrap the content by making the field much wider, causing any fields to the right of the memo to move much farther to the right. The fields are still accessible by using the horizontal scroll bar.*

1.2.6.5.8 Number

Number fields can store and display decimals, percentages, and integers. In other words, Number fields accept only numeric characters. Also, each Number field may accept only appropriate values, for example, the **Number of Plaintiffs** field accepts decimal amounts, whereas a **Total Amount** field in accounts can accept both integers (whole numbers) and decimals. Most decimal amounts are rounded to two places. Invoice expense rates can have up to five decimal places.

Note: *In read-only mode, negative numbers are displayed in parentheses. In edit mode, negative numbers are preceded by a minus sign. You should use the minus sign, not the parentheses, when editing a negative number.*

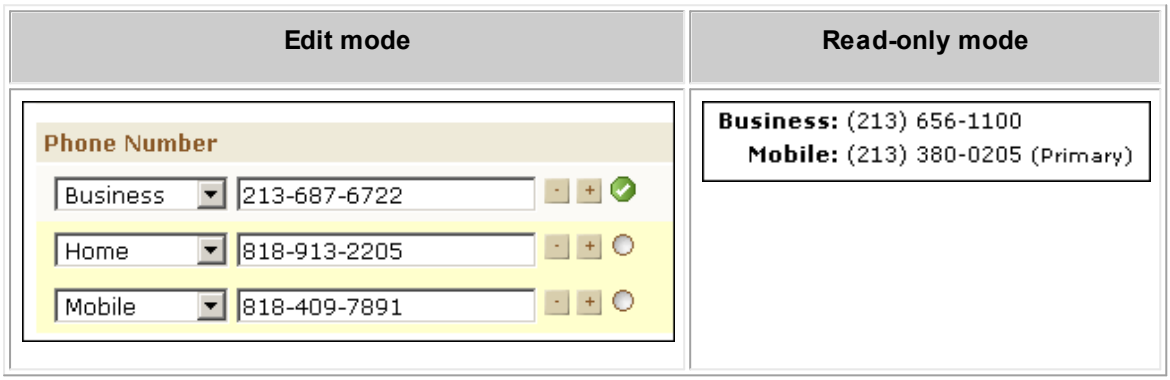
Edit mode	Read-only mode



All number fields automatically format your entries as necessary, for example, to dollar or percentage amounts, and display the appropriate signs. In other words, you do not have to type formatting characters.

1.2.6.5.9 Option Buttons

Option buttons are fields that look like circles that you can use to select only one of the mutually exclusive options. These buttons are sometimes referred to as "radio buttons." To make a selection, click the desired item with your mouse or, alternately, move the focus to the option buttons with the Tab key and use the arrow keys to make your choice.



1.2.6.5.10 Text

Text fields accept any characters. Unlike memo text fields that accept large amounts of text, you can only type up to 50 - 250 characters in text fields.

If you are working with the Workflow Approvals or Invoices, you can enter up to 2000 characters in any **Comments** or **Reason** field.

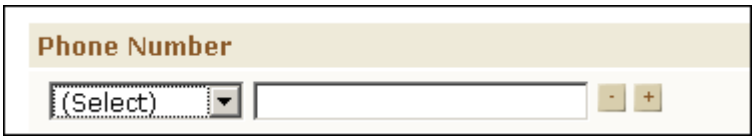
1.2.6.6 Working with Batch Entries

Many of the pages allow you to put in the same kind of information multiple times within a single record. For example, by default, the following pages have batch appearance and functionality:

- **Categories**
- **Relations** and **Involved** (in projects and contacts)
- **Assignees** (in projects)
- **Invoice Line Items**
- **Batch Tasks** and **Batch Expenses**

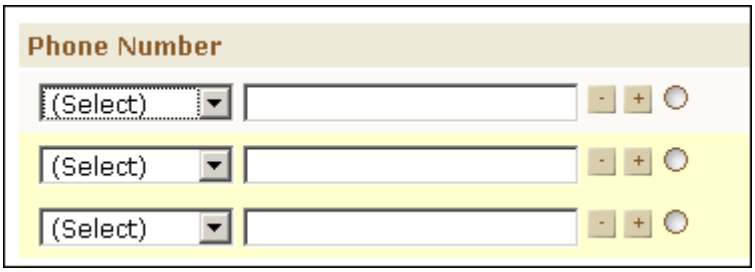
- **Attendees** and **Resources** (in appointments)
- **Address**, **Phone**, **Fax**, **Email**, **Internet Address**, **Skills**, **Rates**, **Territories** (in contacts)

Initially the Phone section in the Contact record has only a single entry available.



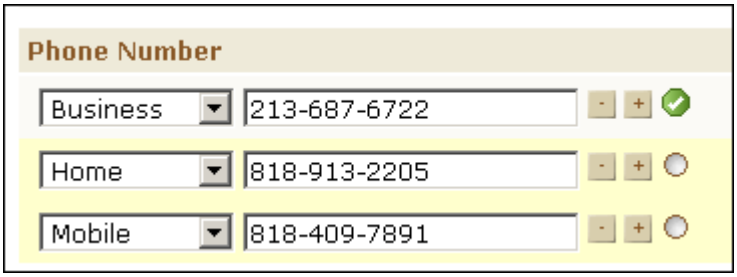
The Phone Section of the Contact Record Type in its Default Single-Value Mode

To add more entries, click the **Plus** button + that is shown to the right of the input fields, one or more times.



The Phone Section after the Plus Button is Pressed Twice

Now the section contains multiple entries, all still blank. You can edit all of these entries.

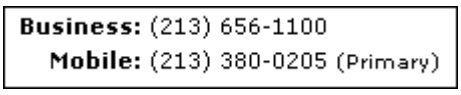


The Phone Section with Multiple Entries after Editing

1.2.6.6.1 Primary Entries

For some record types, when multiple entries are allowed, you must designate one of the entries as primary. You do this by clicking the **Option** button next to the **Plus** button. When an entry is designated as primary, it is used in reporting and in any area where only one entry will be shown, no matter how many other entries exist.

In edit mode, the primary designation appears as a check mark in an option button. In view mode, however, the word "Primary" appears next to the primary entry instead.



Viewing a Primary Entry when in Read-only Mode

1.2.6.6.2 Deleting an Entry

When a section already has multiple entries, and you wish to delete one of them, click the **Minus** button - next to the entry. That entry will disappear but the other entries will remain.

1.2.6.6.3 Editing Batch Entries

For custom blocks, if enabled, you can add or delete one or more fields. Additionally, you can tab to specific fields in the batch display and edit them as necessary. A search feature is also provided so that you can search for information to populate a field.

Note: *This feature is only available if it has been enabled by the system administrator. If not enabled or if you do not have access to this feature, the following screens and functions are not available.*

To add a new entry

- To add a single row, click the **Add New Item** button above the batch display. A new empty row is added to the bottom of the display and the cursor moves to the **Work Item field** so that you can immediately begin adding information.
- To add multiple rows, click the **Add Item** drop-down list and select the number of rows that you want to add. The selected number of rows appear at the bottom of the batch display.

New Entry Row

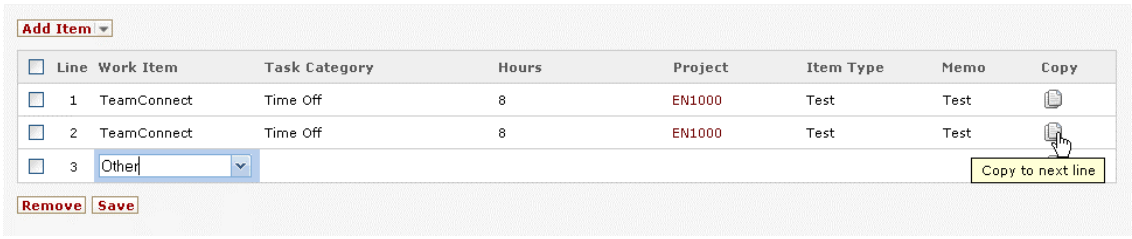
To edit an entry

Click the edit icon next to the line that you want to edit. The field becomes editable and you can make changes.

Edit an Entry wtih Tooltip

To copy an entry

Click the copy icon next to the line that you want to copy. An exact duplicate of the selected line appears at the bottom of the list.



Copy a Row

When you are done adding, editing, or copying entries, click **Save** to save the changes.

To remove an entry

Click the check-box for the entries that you want to remove, and then click **Remove**.

To search in a batch display

Some fields provide a search icon that you can click to search for specific information to populate a field. Click the search icon to enter search criteria. For information about using the search module, see Searching for Specific Records.

Batch Display Search Field

1.2.6.7 Setting Category Details

You can add many additional custom information fields to the pages that appear in the "out of the box" version. To support these custom fields, they are organized into categories. A group of custom fields that belongs to a category is called category details or just details.

Categories are a way of specifying a particular kind of record. For example, in a Contact record of an employee, you may need to enter information about their hire date, manager, and department. To enter these details, the appropriate category, such as **Employee**, should be selected for that contact record. But those same details would not make sense in a Contact record for an outside vendor. For vendors, you may need other specific details instead, such as vendor type and payment methods. This can be addressed by adding the **Vendor** category to the contact record.

Categories control which specific sections of details are displayed on the **Details** sections of a record's **General** page. By adding or deleting categories in a record, you display or hide the associated sections of details in that record.

Note: *Contact records differ from other record types, because all of the details related to categories are displayed on a* ***Details*** *page, not in details sections in the* ***General*** *page.*

You might have many other categories of contacts. Categories can be structured like a family tree. For example, the **Employee** category might be subdivided into **Manager**, **Non-Exempt**, and **Temporary** categories. When you assign the **Non-Exempt** category to a contact record, you automatically include the parent **Employee** category, so that detail sections for both categories would be visible in that record.

The categories used by your organization are entered by your system administrator into a list that is then available for you to choose from when you work on Contact records, Project records, or any custom record type.

Categories and Record Types

Besides the **Contact** record type, categories are also used to control sections of custom fields (category details) in the **Project** record type, and in each custom record type.

In the **Account** record type, categories are used for organizing accounts, but accounts do not have custom fields associated with their categories.

The examples in this portion of the documentation have categories related to the Contact record type.

Assigning Categories

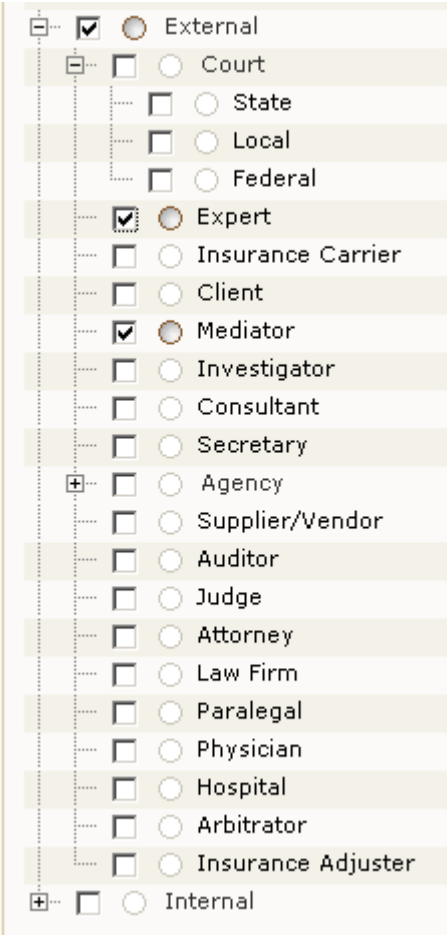
When viewing an existing record's Categories page, only the categories that are presently assigned to the record will be shown. There might be many other categories available for assignment, but they are not visible during viewing.

When editing the Categories page for a record, all of the categories that are available for assignment are shown. The categories that are presently assigned are indicated in check-boxes. You can assign multiple categories to a record.

The list of categories is structured like a family tree. Those branches that are expanded are marked by the minus icon, and those that are presently collapsed are marked by the plus icon. You can expand and collapse branches by clicking these icons.

Expanding Categories

You can assign or unassign a category by clicking the check-box next to the category name to place or remove a check mark in the box.



Placing Checkmarks Next to Categories

Note that assigning a category automatically causes any parent categories to be assigned, too. In this example, assigning **Expert** to the record caused **External** to be assigned, because **External** is the parent of **Expert**. It is also possible to assign a parent category to a record without assigning any of the child categories.

Unassigning Categories

You can unassign a category by clicking the check-box next to the category name to remove the check mark in the box. Unassigning a child category does not automatically unassign the parent category.

Important: *When you edit an existing record and unassign one of its categories, then save the record, all of the information in the category details for that category will be permanently deleted. Even if you re-assign the category the previous information cannot be recovered. Therefore you should use caution when unassigning a category.*

1.2.6.8 Canceling Your Edits

If you choose to cancel the edits you made, click **Cancel & Close** or **Cancel & View** in the record toolbar. Then answer the resulting confirmation dialog box. The record's page disappears and you will return to the page that you were viewing before you began editing.

1.2.6.9 Saving an Edited Record

When you are done working on a record, use the **Save** button on the button bar to save your work. This button might have a label different than **Save**, depending upon how you have been using the button in your session. If you click or hover over the drop-down arrow, as shown in this example, you have one of the following options:

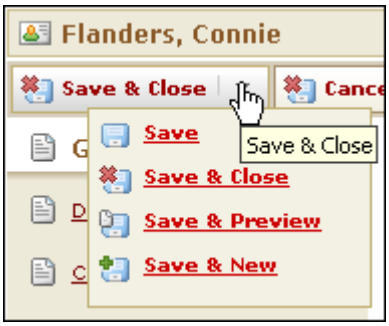
- **Save—**Saves the record but leaves the record open and in edit mode.

  Since you requested that the record remain in edit mode, it will still appear in your list of Unsaved Items. To remove the record from that list, choose a different Save option.

- **Save & Close—**Saves the record, closes the record's page, and then returns you to the previous page.

- **Save & View—**Saves the record, then returns to a read-only view of the record.

- **Save & New—**Saves the record, then opens a new blank record of the same type so that you can enter new information.

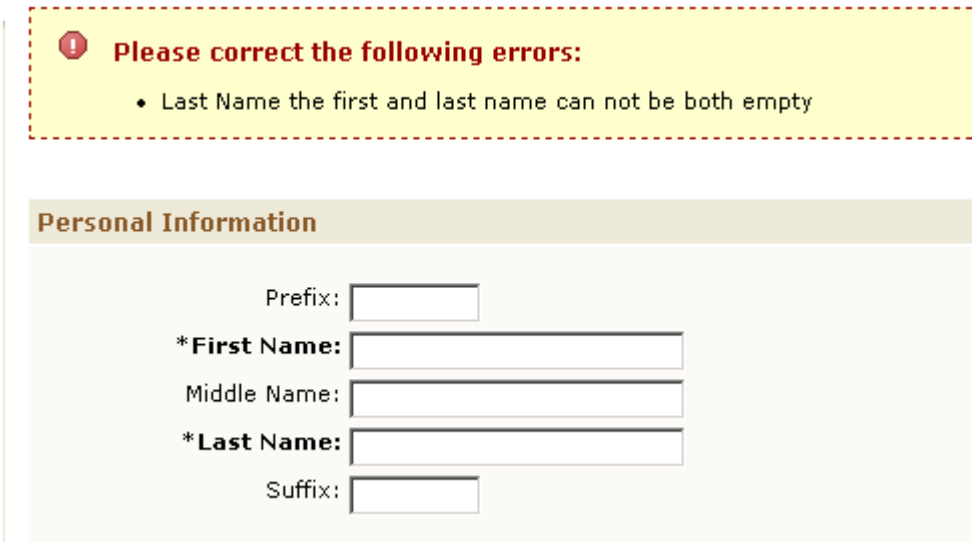


Save Options

If the label on the **Save** button is already the choice you want, simply click the button. If not, click the drop-down arrow on the right edge of the button and make your choice from the list that is shown there.

Note: *Records contain fields to indicate when, and by whom, a record was created, last modified, and last opened. These fields are useful when searching or doing reports. All of these applicable fields are populated with your user name, and the current date and time, when you click a Save option.*

If there are errors in the fields that you were editing, the save operation may fail and one or more error messages will appear at the top of the page.



An Error Message during a Save Attempt on the Contact/General Page

The record remains in edit mode. Correct the errors that are described in the error messages, and try to save the record again.

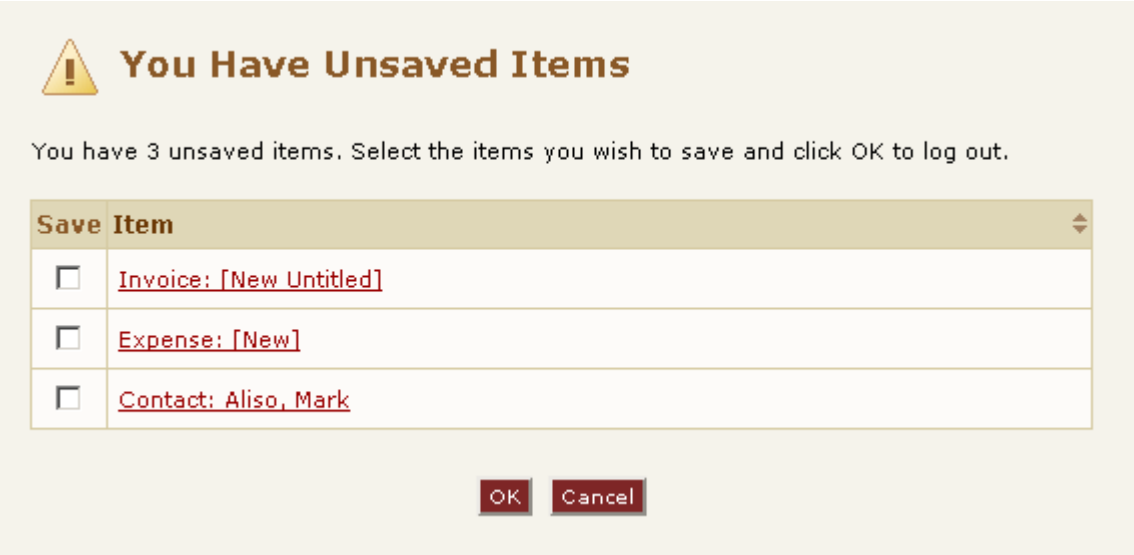
1.2.6.10 Handling Unsaved Records

You can edit a new or existing record, then leave the page where you were editing the record and perform other tasks. When you do this, the record that you had been working on is remembered as an unsaved item. The **Recent Items** link in the upper right portion of the screen will show the presence of unsaved records, as shown in this example.

Unsaved Records

When you hover the mouse over the **Recent Items** link, a window appears that contains links to records you have worked on recently. To return to an unsaved record, simply click the link for that record. You can then edit the record further and/or save the record.

You are also reminded about unsaved records when you attempt to log out while there are still unsaved records present in your session. A window appears that lists the unsaved items.



Unsaved Records Reminder

Each item has a check-box next to it. If you wish to save the items before you log out, click the related check-boxes and then click **OK**. If you do not wish to save any items, leave the check-boxes blank and click **OK**. If you decide not to log out after all, click **Cancel**.

1.2.6.11 Copying a Record

Copying a record is recommended when the new record is very similar to an existing one, and you will not have to change many of the values that are automatically populated.

To copy a record, on the record toolbar, click the **Create a Copy** button. The new record opens and some of the information is identical to the record you copied. You can now edit and save the new record.

Note: *Not every piece of information will be copied from the old record to the new record. Each record type has its own set of excluded information. Generally, child records (such as Involved records for a Project or a custom record type) are never copied to the new record. In addition, any piece of information that displayed as "SECURED" in the old record will not be copied, and that field in the new record is blank. Likewise, in the case that multiple items are selected and one (or more) are deactivated, the inactive items will not be copied.*

The table below displays the copy details for each record type:

Copying a Record

Record Type	What is Copied	What is Not Copied
Accounts	• **General** page • **Categories** page • **Details** page	• *General* page - **Amount** section, **Account Summary** section • **Child Accounts**

	• **Posting Criteria** page (**Posting Criteria Expense**, **Posting Criteria Invoice**, Posting **Criteria Involved**, **Posting Criteria Task**, **Posting Criteria Vendor** sections) • **Security** page (**Group Rights**, **User Rights** sections)	• **Documents** • **History** • **Transactions** • **Workflow** ***Note:*** *If any field displays* ***SECURED*** *as the value, then the new record will not contain a value for that field.*
Appointments	• All of the information on the **General** page (except the Subject) • All of the attendees on the **Attendees** page • All of the categories selected on the **Categories** page • All user and group rights selected on the **Security** page • All of the resources selected on the **Resources** page	• **Documents** that are attached to the **Documents** page • Historical entries on the **History** page • Approval information on the **Workflow** page
Contacts	• **General** page, except for the information in the **Name** field • **Security** page • **Rates** page • **Skills** page	• **Documents** page • **History** page • **Involvement** page • **Relations** page • **Territories** page • **Workflow** page Additionally, none of the address books that the original user created are copied to the new user, and none of the address books to which the original user subscribed are copied.
Documents **Document Folders**	See Copying Documents for more information.	

Expenses	• **General** page > **General Information**, **Access Info** sections • **Security** page (**Group Rights**, **User Rights** sections)	• **General** page > **Billing Information** section • **Documents** • **History** • **Transactions**
Invoices	• **Categories** page • **Details** page • **General** page (except **Line Items**) • **Security** page > **Access Info**, **Group Rights**, **User Rights** sections	• **General** page > **Line Items** section • **Documents** • **History** • **Transaction** • **Workflow** ***Note:*** *If any field displays SECURED as the value, then the new record will not contain a value for that field.*
Projects	• All of the information on the **Assignees** page • All of the information on the **Categories** page • All of the information on the **General** page, except the name and number of the original project • All of the user and group rights on the **Security** page • All of the information on the **Relations** page • Additionally, all of the embedded projects are copied to the new record	• **Accounts** page • **Appointments** page • **Documents** page • **Expenses** page • **History** page • **Involved** page • **Phase History** page • **Tasks** page • **Workflow** page Also, none of the related child projects are copied to the new project.
Tasks	• All of the information in the **General Information** section on the Task **General** page • All of the information on the **Task Security** page	• None of the information in the **Billing Information** section on the **General** page • **Documents** • **History**

		• **Transactions** • **Workflow**

1.2.6.12 Reassigning Work

The **Reassignment Tool** is used to delegate the work of one user to another user or multiple users. With this tool you can reassign all:

- Appointments
- Tasks
- Projects

  The tool lists all projects. However, you can only reassign projects that have the option to be assigned to a user.

When you reassign a project, the tool also reassigns all incomplete tasks and future appointments part of that project.

Note: *If you want to reassign all tasks and appointments as well as projects, the tool first reassigns projects and their related tasks and appointments, and then reassigns tasks and appointments that are not related to any specific project.*

Important: *For performance optimization, the tool reassigns large numbers of projects in small batches of 10 project records. If any record within a batch fails, the tool skips the entire batch and the next batch in the sequence executes. You can view the log for specific information about a failed batch. It is recommended that you reassign large groups of projects during off-peak hours.*

To reassign work

1. Click the **All** tab.
2. In the **Tools** section, click **Reassignment Tool**.

   The **Reassignment Tool** page opens.
3. Select or search for the user whose work you want to reassign.
4. Select the check-box for the **Record Type** that you want to reassign.

Record Type on the Reassignment Tool

5. For each record type that you want to reassign, select the appropriate option in the **Setting** drop-down list:
   - **Appointments**—Select **Future** for appointments that have not occurred or **Future and Past** for all appointments.
   - **Tasks**—Select **Incomplete** for tasks without **Completed** as the **Status**, or select **Unposted** for tasks that have not be posted.
   - Projects or custom objects—Select the appropriate option. The options are most likely **Open** projects or **Open and Closed** projects.
6. In the **New Assignee** column, select or search for a user to be the new assignee of the selected record types.
7. Click **Reassign**.

The status of the reassignment appears in the Status column. If the reassignment was successful, the status looks like the following image.

If the reassignment of a related task or appointment fails, for example, a record is pending approval at the time of the reassignment, the project reassignment fails as well. When the record reassignment is complete, a message displays the number of records successfully reassigned and the number of failures. You can view the log for detailed information. If the reassignment failed, the status looks like the following image.

1.2.6.13 Importing Data to Create Records

Use the Data Import Wizard to create multiple records at the same time. The wizard requires you to add all records to a spreadsheet so that you can import the data from that spreadsheet into TeamConnect.

You can import the following record types:

- Contacts
- Custom Objects
- Involved Contacts

Note: *The Data Import Wizard does not support Embedded Objects.*

To import records, you must first create a data file. See Creating a Data File and Importing Data for more information.

Note: *If you import data for a record that already exists, TeamConnect creates a duplicate record. In the case of contact records, if a solution developer has configured your system to prevent duplicate contacts, the wizard returns an error and does not create the duplicate record.*

1.2.6.13.1 Creating a Data File

To import data, you must create an Excel spreadsheet that contains the record information that you want to import. The spreadsheet looks similar to the following image.

	A	B	C	D	E	F	G	H	I	J	K	L
1	First Name	Last Name	Company	Job Title	Type	Address	Address Type	City	State	Zip	Phone	Phone Type
2	Beatrice	Wilk	Hill, Inc.	Accountant	P	34009 Washington Pl.	Business	San Diego	CA	90016	310-555-1215	Business
3	Willie	Nels	Hill, Inc.	Accountant	P	34009 Washington Pl.	Business	San Diego	CA	90016	310-555-1216	Business
4	Annette	Perkins	Hill, Inc.	Sr. Accountant	P	34009 Washington Pl.	Business	San Diego	CA	90016	310-555-1217	Business
5	Daryn	White	Hill, Inc.	Account Intern	P	34009 Washington Pl.	Business	San Diego	CA	90016	310-555-1218	Business
6	Helen	Washington	Hill, Inc.	Account Supervisor	P	34009 Washington Pl.	Business	San Diego	CA	90016	310-555-1219	Business
7												

Contacts Example

Note: *If your Excel workbook has multiple sheets, only the first sheet uploads.*

To create a data file

1. (optional) Open the appropriate record type and use the label names in the record as a guide to determine label names for your data file.
2. Enter the label names in the first row of the spreadsheet.

   For example, for contact records, you could enter First Name, Last Name, Company, Job Title, Type, etc., as shown in the Contacts Example image. If you are creating a contact import file, see Importing Contacts for additional information.
3. Enter data for each record in a row.

Note: *It is recommended that you import a small number of records to ensure that your data meets the guidelines.*

Data File Guidelines

The following guidelines apply for the first row:

- The first row cannot contain duplicate label names, even if the names have different cases.

  For example, Address, address, and aDDress are all considered duplicates.
- Label names cannot contain the following symbols:

  < (less than)

  > (greater than)

  . (period)

  & (ampersand)

' (single quote)

" (double quote)

[(left bracket)

] (right bracket)

In addition, TeamConnect ignores macros and formulas and removes currency and percent symbols when importing data.

Localized Labels

If you want to create a data file that contains localized data for system and custom lookup fields, assignee roles, and categories, enter the field's tree position instead of translating the field.

Importing Categories

If you use a **Category** label in your data file, you can enter more than one category in the same field, separated by commas. The first category in the cell is automatically the **Primary** category.

For multiple categories, the **Category** cells may appear as follows:

A	B	C	D
First Name	Last Name	Company	Category
Beatrice	Wilk	Hill, Inc.	Employee, Account Dept.
Willie	Nels	Hill, Inc.	Employee, Attorney
Annette	Perkins	Hill, Inc.	Employee, Paralegal
Daryn	White	Hill, Inc.	Employee, Admin
Helen	Washington	Hill, Inc.	Employee, Account Dept, Manager

Categories Example

Importing Contacts

Contact data files must contain a **Type** field for each entry. The options for the **Type** field must be one of the following:

- **P** or **Person**.
- **C** or **Company**.

This field is not case sensitive. See the Type field in the Contacts Example image for an example.

In addition, each entry that has a **Type** drop-down box, such as the **Address** or **Phone** label, must have a **Type** entry in the data file. For example, if you have an **Address** heading label in your data file, you must also have an **Address Type** heading label, as shown in the following image.

	A	B	C	D	E	F	G	H	I	J	K	L
1	First Name	Last Name	Company	Job Title	Type	Address	Address Type	City	State	Zip	Phone	Phone Type
2	Beatrice	Wilk	Hill, Inc.	Accountant	P	34009 Washington Pl.	Business	San Diego	CA	90016	310-555-1215	Business
3	Willie	Nels	Hill, Inc.	Accountant	P	34009 Washington Pl.	Business	San Diego	CA	90016	310-555-1216	Business
4	Annette	Perkins	Hill, Inc.	Sr. Accountant	P	34009 Washington Pl.	Business	San Diego	CA	90016	310-555-1217	Business
5	Daryn	White	Hill, Inc.	Account Intern	P	34009 Washington Pl.	Business	San Diego	CA	90016	310-555-1218	Business
6	Helen	Washington	Hill, Inc.	Account Supervisor	P	34009 Washington Pl.	Business	San Diego	CA	90016	310-555-1219	Business
7												

Contacts Example

Adding Secondary Field Labels

You can also add secondary information for the same label type, such as a secondary address for a contact.

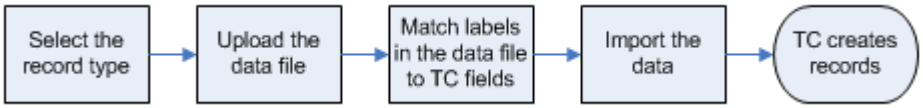
For example, for a secondary address, create and then populate labels similar to the following labels:

- address2
- city2
- state2
- zip2

Once you import the data file, you can use the **Add More Fields** option to map these fields as secondary addresses.

1.2.6.13.2 Importing Data

When the data file is complete, use the Data Import Wizard to perform the following process.



Data Import Wizard Process

Note: *The information that you see and the tasks that you can perform while using the import wizard depend on your access rights.*

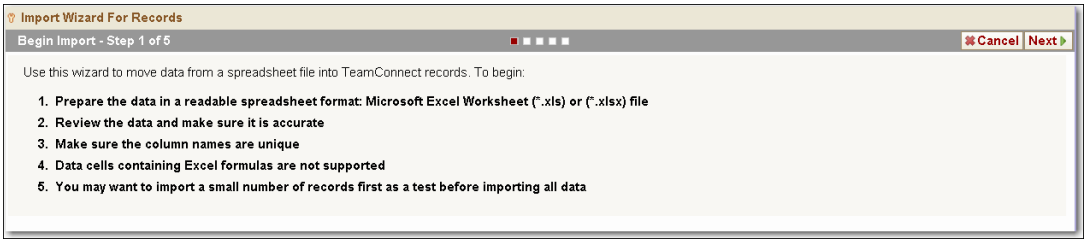
An incomplete import wizard appears in the list of **Unsaved Items** in the top-right of your browser. If you click away from the wizard at any time, click **Unsaved Items** to resume your work. The wizard no longer appears under **Unsaved Items** when you finish or cancel the wizard or log out of TeamConnect.

To import records

Note: *The following procedure assumes that you created or obtained a data file that meets the import guidelines. See Creating a Data File for more information.*

1. Click the **All** tab.
2. In the **Tools** section, click **Data Import Wizard**.

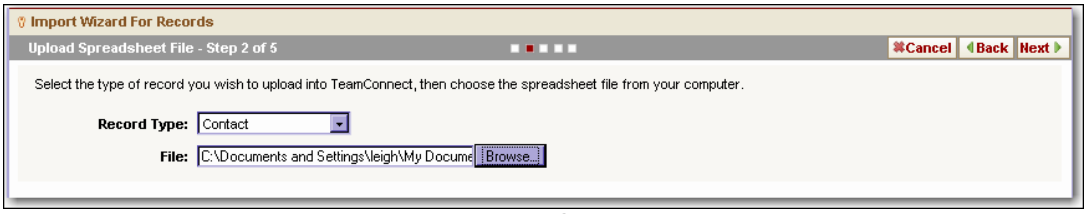
   The **Data Import Wizard** opens to the first page.



Data Import Tool, Page One

3. Review the first page, and then click **Next** to continue.

   The **Upload Spreadsheet File** page opens.



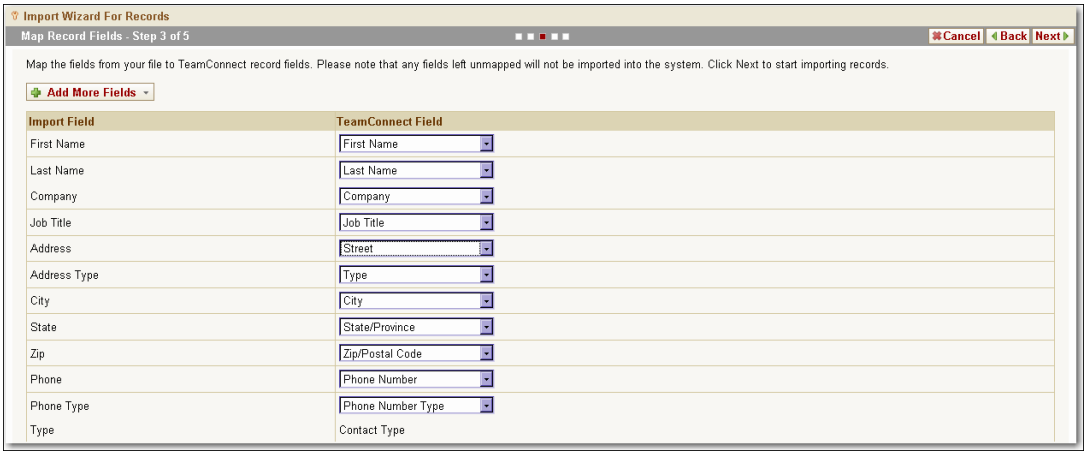
Data Import Tool, Upload Spreadsheet File Page

4. In the **Record Type** drop-down list, select the type of records that you want to create.
5. Click **Choose File** or **Browse** to locate the spreadsheet file that contains the data that you want to import.
6. Click **Next**.

   TeamConnect searches system and custom field labels to match the imported labels to TeamConnect fields.

   When the tool finishes analyzing the data, the **Map Record Fields** page opens.

   The label names from your data file appear in the **Import Field** column. If TeamConnect finds a match, the suggested label names appear in the **TeamConnect Field** column.



Data Import Tool, Map Record Files Page

7. For each incorrect or unmapped field, click the **TeamConnect Field** drop-down list, and select the correct label name.

If you added secondary fields or fields not in the drop-down list to the imported data, you can also adding more fields.

8. Click **Next**.

   If you mapped a field twice, an error message appears. Correct the error, and click **Next** again to continue.

   A **Confirmation** page opens that displays the number of records to be imported.

Import Conformation Page

9. Click **Next** to import the mapped data.

   Importing may take several minutes, depending on the number of records you are importing.

   During the import, TeamConnect ignores all blank lines and empty cells. Any custom rules that trigger upon record creation automatically execute.

   When the import is complete, a confirmation page provides the details of the data import, including the number of records imported and the number of records that did not import because of errors. See Data Import Wizard Errors for how to troubleshoot errors.

Wizard Confirmation Page

10. Click **Finish** to close the wizard. ***Note:*** *After import, the Excel file will not be retained within the TeamConnect instance.*

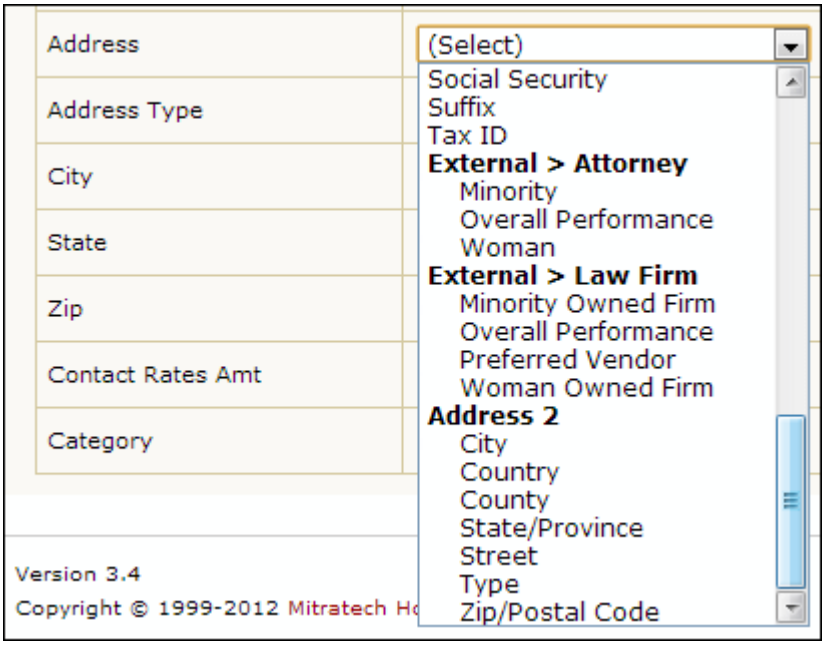
To add more fields

To add more fields, click **Add More Fields**, and select the type of field that you want to add.

Add more fields in one of the following situations:

- You want to import secondary fields, such as a second address or phone number.

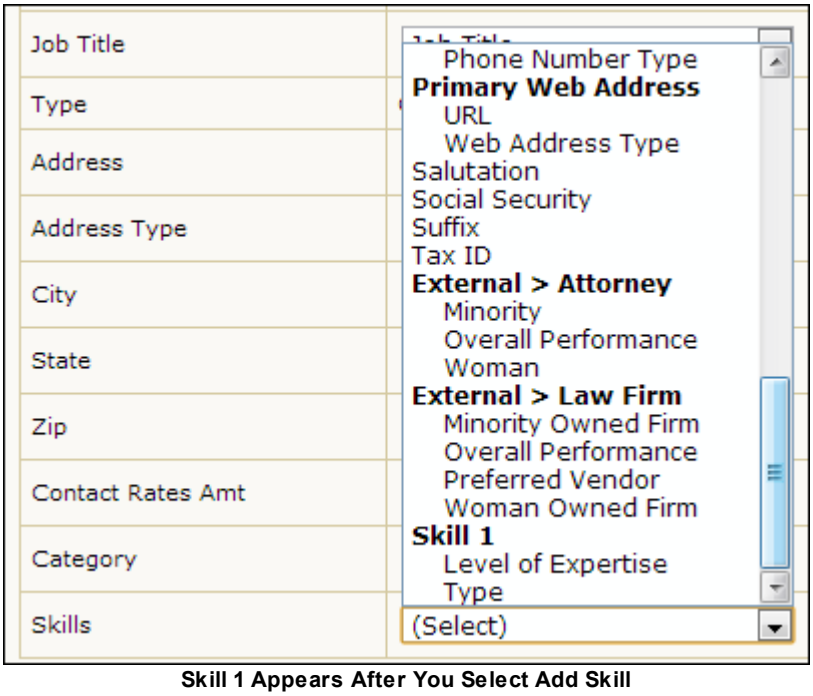
  For example, if you want to add a second address, click **Add More Fields**, and then select **Add Address**. The secondary address fields appear as **Address 2** in all drop-down lists. You can now map these labels to the secondary address labels.



Address 2 Appears After You Select Add Address

For an additional group of fields, such as a third address, add more fields again.

- You want to import fields not currently in the drop-down, such as rates or skills. Select **Add Invoice Task Rate**, **Add Task Rate**, or **Add Skill** to add these types of fields to the drop-down list.



Skill 1 Appears After You Select Add Skill

For example, if you are importing contact records, the following table includes the mapping options for that record type.

Adding More Fields For Contacts

Add More Fields Selection	TeamConnect Field on Mapping Page	TeamConnect Field in Contacts Record
Add Address (for the **General** page)	City	City
	Country	Country
	County	County
	State/Province	State/Province
	Street	Street
	Type	Type
	Zip/Postal Code	Zip/Postal Code
Add Default Rate (for the **Rates** page)	From Date	Start Date
	Rate	Rate
	To Date	End Date
Add Email Address (for the **General** page)	Email Address	Email Address
	Email Address Type	Email Address Type
Add Invoice Task Rate (for the **Rates** page)	Category	Task
	From Date	Start Date
	Rate	Rate
	To Date	End Date
Add Phone Number (for the **General** page)	Phone Number	Phone Number
	Phone Number Type	Phone Number Type

Add Relation (for the **Relations** page)	Direction (Enter TO_THIS or FROM_THIS in the spreadsheet)	Switch Relation
	Related Contact	Contact
	Type	Relation
Add Skill (for the **Skills** page)	Level of Expertise	Level of Expertise
	Type	Type
Add Task Rate (for the **Rates** page)	Category	Task
	From Date	Start Date
	Rate	Rate
	To Date	End Date
Add Territory (for the **Territories** page)	Territory	Territory
Add Web Address (for the **General** page)	URL	Web Address
	Web Address Type	Web Address Type

The selections for **Add Address**, **Email Address**, **Fax Number**, **Phone Number**, and **Web Address** are all for adding secondary fields. The primary fields already exist in the drop-down.

Data Import Wizard Errors

If all records do not import, you can troubleshoot the errors that appear in the spreadsheet TeamConnect returns.

For example, if TeamConnect checks for duplicate contact records before creating a new record, the system marks the duplicate record as failed and logs the error.

To troubleshoot Data Import Wizard errors

1. From the **Import Confirmation** page, click **Download spreadsheet file with failed rows** to review them.
2. Open the spreadsheet to display explanations for the rows that did not import.

3. Use the error explanations to make corrections.
4. Repeat the import process.

Note: *To save time and to avoid duplicate records, re-import only the data that did not previously import.*

1.2.7 Deleting Records

Pages that are used to view a single record may also contain a button labeled **Delete**. Click **Delete** to submit a request to delete that record.

Note: *The **Delete** button is unavailable on pages that are used to edit a record.*

After clicking **Delete**, you are shown a confirmation message box that asks whether you truly want to delete the record. Click **Yes** to proceed. A success message is displayed at the top of the page and the record is then deleted from the database, subject to the exceptions below.

There might be workflow rules associated with a deletion. In this case, although your deletion request has been accepted, the record would not disappear from the database immediately, but would remain while the deletion request is pending approval. If the request is approved, the record disappears from the database. If the deletion request is rejected, the record will not be deleted.

Sometimes a deletion request will be denied because the record is linked to other records. An error message will appear when this happens. That message means that the link must be removed, or the other records must be deleted, before you can delete the current record.

Deletion of a record might cause other records to be deleted or altered. To see what effects deletion can have, refer to the table below.

Deleting Records

Record Type	What Deletes	Conditions that Prevent Deletion
Accounts	• Child accounts • Associated transactions in expense, task, and invoice records • Associated approvals • Associated documents and folders • Associated history records	• The account balance is other than zero. • The account has an attached document that is currently checked out. • The Accrual amount is other than zero.
Address Books	The address book and all of its contacts.	n/a

	Only the book is deleted; contacts remain in the system.	
Appointments	Appointment is removed from the calendar along with all of the information on the additional calendar pages. ***Note:*** *You can delete appointments in List view.*	If a document that is attached to an appointment is currently checked out, you cannot delete the appointment.

Contacts	• All associated addresses, phone numbers, and all of the information on the additional contact pages
	• All relations with projects and other contacts
	• Associated approvals
	• Associated Involved records
	• Associated documents and document folders
	• Associated history records
		• If listed as a contact in an expense record
		• If listed as a contact in a task record
		• If listed as a vendor in an invoice record
		• If listed as a timekeeper in an Invoice Line Item record
		• If listed in an account record as one of the following:
		  ○ General - vendor
		  ○ Posting Criteria - involved
		  ○ Posting Criteria - vendor
		  ○ User Account records (on the Admin side)
		• If the contact has a document checked out

Documents **Document Folders**	See Deleting Documents and Document Folders.	
Expenses	• Associated approvals • Associated documents and folders • Associated history records	• The expense has an attached Document that is currently checked out • The expense is currently posted to an account

Invoices	• Associated Line Items if they have not posted to an account. • Associated approvals • Associated documents and folders • Associated history records	• The invoice has an attached Document that is currently checked out • At least one of the invoice Line Items is posted to an account
Projects	• Assignees, phases, and other contents of the record • Relations with other projects • Associated involved records • Associated approvals • Associated documents and folders • Associated history records • Accounts that use this project as a posting criterion • Appointments created for this project • Associated Expense and Task records • Associated Invoice line items • All child projects that have this project selected as their parent	A document on the **Documents** page for this project is checked out. See Editing Documents for more information.
Reports	The report is deleted from the list view, all collections, and folders.	• The user does not have system rights to delete reports • The user does not have record level rights to delete a specific report. • The record is currently locked for editing by any user • The report is executing
Tasks	• Approvals • Documents and folders • History records	• The task has an attached document checked out. • The task is currently posted to an account

	Note: *You can delete many tasks in one operation. See Using the Task Entry Tool for more information.*	

1.2.8 Printing Records

Clicking the **Printable View** button in the toolbar will create a separate browser window with a printer-friendly report of the information you are currently viewing. The button behaves differently depending on whether you are viewing a list of records or viewing an individual record.

To print a list of records

1. Click **Printable View** in the toolbar.

   The **Printable View** window appears.

2. (Optional) Enter a title for your report.

3. Indicate whether you would like filter information to print on the report.

   Filter information indicates what search restrictions were used when originally generating the list of records.

4. Click **OK**.

   The **Printable View** window closes. A new browser window appears, displaying your record list.

5. In the new browser window, click **Print This Page**.

6. Click **Close This Page**.

To print an individual record

1. Click **Printable View** in the toolbar.

2. The **Sections** window appears.

   All of the possible information sections related to your record are shown. They are all presently selected with a check-box. Uncheck any sections that you do not want to print.

   The check-box next to the word **Sections** will select, or de-select, all of the individual sections simultaneously when you click it.

   Sections that are marked with an asterisk require more retrieval time. You can still print these sections, but response time will be longer than if you did not include them.

3. Click **OK**.

   A new browser window or tab appears, displaying your record's information.

4. In the new browser window or tab, click **Print This Page**.
5. Click **Close This Page**.

1.2.9 Working with Record Security

From the Security page, you can perform the following tasks:

- Viewing Record Security
- Editing Record Security

There are two kinds of security. The first is a comprehensive security feature, used by system administrators, that assigns rights to user groups. These rights are the ones that determine whether you can view, edit, create, or delete records for a specific record type.

This section will describe the second kind of security - record security that can be assigned by an ordinary user and applies only to one single record at a time.

Examples of when you may need to set record security include:

- Public records need to be made accessible to limited-privilege users.
- Public records need to be made inaccessible to specific groups.
- Private records need to be made accessible to specific users or groups other than the user who created the record.

Public records are available to all users, and groups must be added to make the records inaccessible.

Private records must have all users or groups added to its permissions in order to make the record accessible.

More information on Public vs. Private record security can be found here.

The security features described here have no effect on a user whose level of access is "superuser" rather than "normal" or "limited". A superuser can manipulate any record, even if you explicitly deny them access to a record in the record's **Security** page.

Users who create a record typically have access to it, regardless of the settings on the **Security** page--provided they have the right to read that record type. Similarly, all project and task assignees and appointment attendees are automatically granted the rights to read, update, and delete the records.

Depending on your organization's security settings, related records of projects may automatically inherit the same security settings as their parent project. For example, if a parent project's security is set so that you cannot delete it, then you may not be able to delete its related appointments, histories, and tasks, even if you are the user who created those related records.

Similarly, while a parent project is pending approval, you may not be able to modify that parent project or any of its related appointments, histories, tasks, and other options, depending on the administrative security settings.

The individual record security feature cannot be used to override the comprehensive security feature. For example, if you explicitly grant View rights for a Contact record to group "reviewers", but

"reviewers" does not have View rights for the Contact record type, then that groups's users would still be unable to view that Contact record.

The ability to control security for an individual record is a set of two rights (**view security** and **edit security**) that are granted to you by your system administrator. If you do not have these rights, you will not be able to see or use the **Security** page of a record.

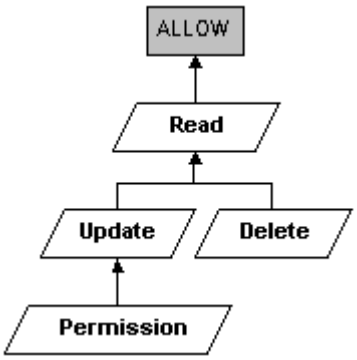
The individual rights that can be assigned on the **Security** page are:

Record Security Rights

Right	Description
Read	Allows the users in a group to view or read the record. If a user or group is denied this right, the record will be invisible to them (will not appear in lists or search results.) ***Important:*** *If you grant any of the other three rights to a user or group, you automatically grant them the right to read the record. See the security rights dependencies diagram.*
Update	Allows the users in a group to edit and change the record. If a group has Read rights to a record, but does not have Update rights, the record will be included in lists and search results, but a small image of a lock will appear where the edit icon would normally appear. This tells the user that the record cannot be edited.
Delete	Allows the users in a group to delete the record.
Perm (Permission)	Allows the users in a group to set the record security through its **Security** tab to grant or deny access rights to other users.

Rights are somewhat dependent on each other. For example, if you want to grant a Permission right, to edit the record security, you must also assign the Read and Update rights. If you want to assign the Update right, or the Delete right, you must also assign the Read right. Note that the application will automatically assign the dependent rights when you select a right that has dependencies.

The following diagram illustrates the dependency of the record rights when you want to allow any of them to a user or group. The arrow in the diagram indicates that the right it points FROM requires the right it points TO.



Security Rights Dependencies Diagram

When denying access rights, the dependencies cause slightly different effects. By default, if you deny a group the Read right, the rest of the rights for the record are automatically denied. Also, if you deny a group the Update right, the Permission right is denied. Again, the application automatically sets the other dependent rights when you select an individual right.

1.2.9.1 Viewing Record Security

While viewing a record, click on the **Security** link in the left pane.

To view the two Security page sections

1. Privacy determines whether the record behaves as **public** or **private**. If it is public, the record will be shown or hidden based on the rights that have been assigned to the overall record type. If it is private, the record will be hidden from all users except the user who created it. However, there can be exceptions to those behaviors, and the exceptions are determined by entries in the **Group Rights** section.
2. **Group Rights** contain exceptions to the public/private behaviors, organized by user group. For example, if a record is private, you could enter an exception that would allow a specific group to edit that record, while all other groups would still be unable to see the record.

Field Name	Description
Option	Indicates whether this row Allows or Denies specific rights to the record.
Group	The user group to be affected by these rights.
Read, Update, Delete, Perm	Four fields, each containing **Yes** or **No**, to indicate which rights are being allowed or denied. See a detailed explanation of these rights in Record Security Rights.

See Working with Record Security for more information.

1.2.9.2 Editing Record Security

While editing a record, click on the **Security** link in the left pane.

See Working with Record Security for conceptual information.

To edit the Security page sections

1. Privacy determines whether the record behaves as public or private. Click the appropriate option button to make that determination.
2. Group Rights contain exceptions to the public/private behaviors, organized by individual users. Enter information as described below.

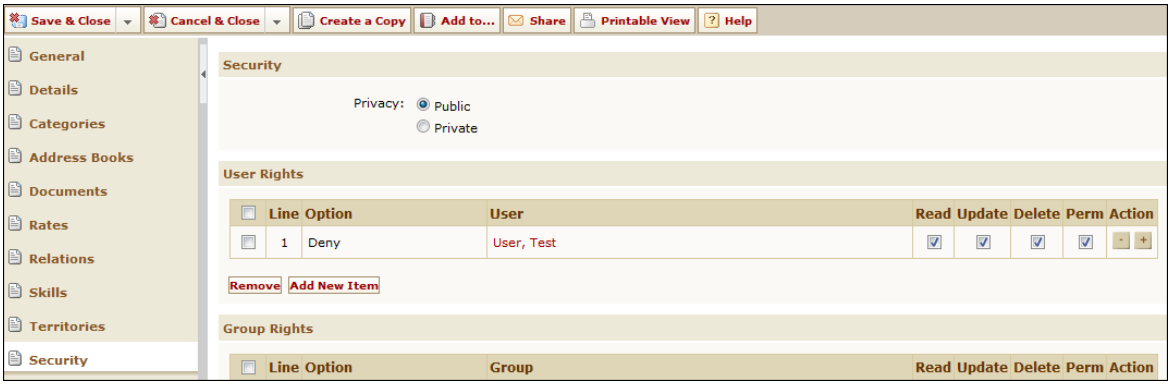
Field Name	Description
Option	Choose whether to Allow or Deny specific rights to the record.
Group	Select a user group to be affected by these rights.
(check-boxes)	A group of check-boxes determines what kind of rights are being allowed or denied. Click the boxes that should be affected. See a detailed explanation of these rights in Record Security Rights.
Action	Click the minus icon - to delete the associated row. Click the plus icon + to add a new row of information.

3. Click **Save**.

1.2.9.3 Public and Private Record Security

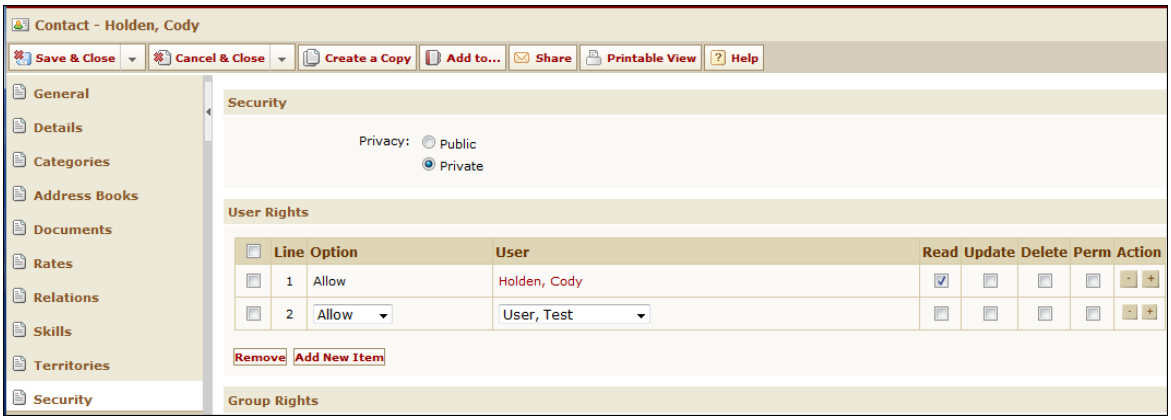
Records can be set to either **Public** or **Private** security. These settings can be accessed via the **Security** link on the left side navigation pane of any record.

Public records automatically allow all AllRights users to view the record. Only limited-privilege users need to be added to view the record. Similarly, you must specifically add groups or users with AllRights to "Deny" in order to block these records from those users.



Public Record Security

Private records default to only let the record creator view the record. You must specifically add groups or users to Allow and select their Read, Update, and Delete permissions to make this record accessible.



Private Record Security

1.2.10 Working with Record History

When working with record history, you can perform the following tasks:

- Opening History Pages
- Viewing General History Information
- Creating Record History Entries

History records reflect chronology or history of the record to which they are related. Every history record is related to a parent record - there are no standalone history records. History entries may contain such information as payments made by involved parties, and automated assignments. History records of a project may register such things as when the main assignees were changed and the dates when a lawsuit was filed. History records may be referred to as docketing or calendaring, narratives, logs, diaries, notes, or journals.

History records can be generated automatically or created manually. One of the more common uses of manual history records is to enter narratives associated with legal matters. For history entries that track changes made to a parent record, automated rules typically generate the appropriate history entries automatically when certain events occur in the parent record.

Most records have their own **History** link where you can create, search for, view, and delete all necessary history entries pertaining to the record. The **History** page behaves like a regular collection, and has a button that allows you to add new manual history entries.

From the **History** page on a record, change the **View** for the page.

Views on the History Page

View	Description
Recent History	Displays history entries associated with this record.
Recent Narratives	Displays recent matter narratives associated with this record.
By Date Range	Displays a search filter for the entries associate with this record.

1.2.10.1 Opening History Pages

Most records have their own **History** list page where you can create, search for, view, and delete all necessary history entries pertaining to the record. The **History** page looks and functions like a regular collection. Each history entry also has its own set of pages for displaying and editing its information.

You can access the history page of a record in the following ways:

- Through the **Histories** link in the **All** navigation pane. You can use this option when you want to search through all history entries in the database.
- Clicking the **History** link of a record while viewing or editing that record. This is a convenient way of viewing all history information pertaining to that specific record.

To open the pages of a history entry

1. Click the **History** link in the left pane while viewing the record.
2. Find the desired history record by examining the list of results. Click on the record's name.

   If the parent record has a large number of history entries, and you do not wish to examine a large list to find the specific history entry you are interested in, you can click the **Show Filter** link to request a more filtered list of entries.
3. The corresponding History entry page appears in Read-only mode with its **General** page displayed by default.
4. To change information in the entry, click **Edit** on the record toolbar to make the read-only fields editable.
5. Click the link related to the information you would like to view or change.

History entry pages

History entries typically have the following links in the left navigation pane:

- **General—**Displays the general information of the history entry. See Viewing General History Information.
- **Categories—**Displays the categories added to the selected history entry. For more background information, see Setting Category Details.
- **Documents—**Displays documents associated with the selected entry. See Viewing Documents for more details.
- **Security—**Displays users and user groups who are given or denied access to the selected record. See Viewing Record Security for more details.
- **Workflow—**Displays the approvals or rejections log for the history entry.

1.2.10.2 Viewing General History Information

General history information is typically entered and displayed on the **General** page of the history entry. It includes the date and time when the entry was made, its default category, the name of the user who made the entry, the details of the entry, and the hyperlink to the record that created it.

The following table describes the items on the **General** tab of history entries.

General Page of a History Entry

Field or control	Description
Date	Type the date or click the **Calendar** icon to specify the date on which the history entry is created. By default, the system displays the current date.
Time	Type the time or click the **Time** icon to specify the time in which the history entry is created. By default, the current time is displayed. By default, the system displays the current time that is read from the server.
Description	Type the appropriate details of the history entry. Make sure they are concise and to the point. ***Note:*** *The first 250 characters are displayed as the* ***Description*** *for this entry in the search results.*
Parent Record	Automatically displays a hyperlink to the record within which the history entry is created.

1.2.10.3 Setting History Categories

Companies often find it useful to organize their history entries by categories. History categories are certain events that necessitate making the corresponding history entries. For example, in litigation, categories can be depositions, pleadings, amendments to petitions, notice of litigation, and notice of termination. These may include subcategories. All categories can be added, viewed and deleted on the **Categories** page of the history entry.

To set history categories

1. Click on the **Categories** link in the left pane of the history entry page.
2. Choose categories for this entry as described in Setting Category Details.

1.2.10.4 Creating Record History Entries

History entries are often generated automatically. Automatically generated history entries are added to the appropriate records according to the rules set by your administrator. However, you can also create history entries manually. This section describes that procedure.

To create a history entry for a record

1. Open the record where you want to make a history entry (for example Appointment, Task, or Claim).
2. Click the **History** link in the left pane.

   Your **History** search results appear.
3. Click **New**.

   The **General** page of a new **History** entry appears with the blank fields displayed for you by default.
4. Enter the appropriate values for the new History entry as described for the General page of a History entry.
5. (Optional) Add other appropriate information on the other pages.
6. **Save** the entry, as described more generally in Saving an Edited Record.

Points to Remember

- Any History entry can be made only from its "parent" record to which it is related.
- The information in the **Description** field should be brief and to the point so that users can easily distinguish among different history records in a list of search results.

1.2.11 Working with Related Records

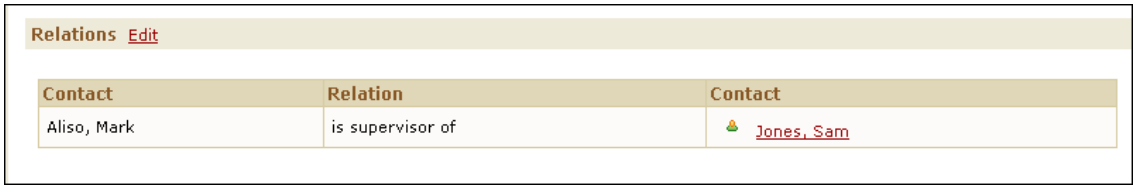
Records can be related in various ways. When two records of the same record type are associated with each other, they are related, and the relationships can be seen on the **Relations** page of each record. You can only relate records of the same type on the **Relations** page. For example, when two Contacts are associated with each other, such as one Contact is the supervisor of another Contact, that association appears on the **Relations** page.

If the record types are different, the association between them is shown on a page other than Relations. For example, when two Contact records are associated with an Appointment record, the two contacts are listed on the **Involved** page of the Appointment, not the **Relations** page, because Contact and Appointment are different record types.

A record can have none, one, or multiple relations. Contacts have relations, as do all custom record types, and the Project record type. Other record types do not have the Relations feature.

To view relations

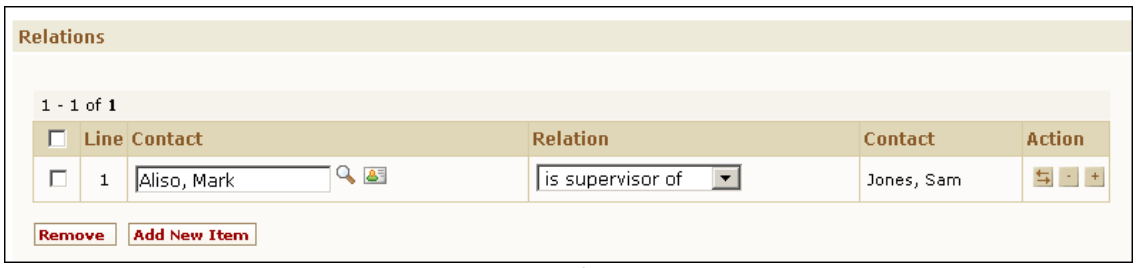
While a record is open, click the **Relations** link in the left pane. The **Relations** page opens and displays existing relations. Clicking the **Edit** link on this page allows you to set relations for this record.



A Contact Record with One Existing Relationship to Another Contact

To set relations

To set relations for a record, go to the **Relations** page for that record. If you are in view mode, click the **Edit** link to enter edit mode.



Editable Fields for a Relation

To add a new relation

Click the **Add New Item** button on the **Relations** page. Alternately, you can click the plus button + on an existing row. In the new row that appears, fill out the fields. Then click a save option.

To delete an existing relation

On the **Relations** page, click the check-box next to a Relation, then click the **Remove** button. Alternately, you can click the minus button on a Relation row. Then click a **Save** option.

1.2.12 Working with Record Documents

Every record can have documents associated with it. Documents are external files, such as images or word processing files, that are uploaded into the database. There is a **Documents** tab in the main tab bar which lets you search for and view documents across the entire database. There is also a **Documents** link in the left pane of each record type. This link takes you to a **Documents** page that lists only documents that are associated specifically with the record that you are currently viewing or editing.

Details of how to use the **Documents** page to manage your record's documents can be found in Viewing Documents.

1.2.13 Viewing Workflow for a Record

Workflow is the process of approving and rejecting requests in TeamConnect. A request originates when you perform an action that is subject to one or more rules. The rules that have been defined for your system determine the workflow processes that take place while you work in TeamConnect. A request for approval is automatically sent to one or more people according to a predefined sequence.

For more details about how to work with approval requests, see Workflow.

1.3 Contacts and Address Books

The Contacts area is a central storage space for names, addresses, phone numbers, and other details about people and organizations.

You can also organize contacts into address books that you can use to quickly view information about all of the contacts in the group, or send messages to a group.

1.3.1 Contacts

Contacts within TeamConnect are individuals, companies, or organizations for which your organization needs to store detailed information. Contacts may include vendors, outside counsel, claimants, injured parties, witnesses, agencies, and internal employees.

Types of Contact Records

TeamConnect contains two general types of contacts records:

- **Persons—**Individuals that are internal or external to your organization.
- **Companies—**Organizations, such as external agencies, outside counsel law firms, or internal subsidiaries of your company.

Types of Contact Members

TeamConnect contact records contain the following types of members:

- **Contacts who are TeamConnect users—**Based on their assigned rights, these users have access to TeamConnect and can be assigned to tasks or projects, and added as attendees to appointments. These contacts are usually internal employees.
- **Contacts who are not TeamConnect users—**These users do not have access to TeamConnect and may include internal and external contacts, for example employees, clients, outside companies, or vendors.

Each contacts record may have multiple sets of contact information, and, for easy access, you can enter all of the information on the same record.

The following table shows how you can view, create, and edit contacts.

...Contacts		How...
Viewing		• Viewing the Address Books for a Specific User • Viewing Company Employees • Viewing Contact Involvement
Creating		• Creating a Contact • Duplicate Contacts
Updating	General Information	• Setting Contacts Primary Information • Setting Contact Details • Adding and Removing Contacts Categories
	Hourly Rates	• Setting Contact Rates
	Related Contacts	• Relating Contacts
	Skills	• Setting Contact Skills
	Territories	• Selecting Contact Territories
	Security	• Editing Record Security

Best Practices for Contacts

- If you do not see any contacts when you click the **Contacts** tab, click the **All Contacts** link or any of the other page links in the left pane.
- To create a new contact for a company, make sure you click the **New** drop-down and select **New Company**.

- Add a contact to an address book from the address book, not the contact record.

1.3.1.1 Types of Contact Views

You can view contacts in a list view or card view. The default view is always the last view that you used to display contacts.

You can also view contact records in a collection or search for records. See Modifying a Collections Search and Searching for Specific Records.

Contact List View

The contacts list view lets you view the contacts that you have the rights to view in a list format.

To view contacts in a list view

1. Click the **Contacts** tab.
2. If the list view does not appear by default, in the **Display** drop-down list, select **List View**.

Tip: *If you use your mouse to hover over a contact in any view, a pop-up window displays the primary contact details.*

The first time that you try to view contacts, it may appear that there are no contacts available in the list view because the list view defaults to the **Recently Viewed** collection.

To view all of the contacts that you have the rights to view, click the **All Contacts** link in the left pane. The next time that you access projects, the list view defaults to the last collection that you opened.

Contacts Card View

The card view lets you view contacts in a "business card" view that displays all of the primary information that appears on the General page.

To view contacts in a card view

1. Click the **Contacts** tab.
2. If the card view does not appear by default, in the **Display** drop-down list, select **Card View**.

Contacts Card View

For information about the specific areas in the **Contacts** list view, see User Interface.

To open contact records in other areas

You can open contact records in the following locations in TeamConnect:

- **General** page in the **Access Information** section—Click on the link in the **Created by** or **Modified by** fields. See General page field descriptions for more information.
- **Projects**—On the **Assignees** page for a project. See Viewing Users Assigned to a Project.
- **Global Documents** page or **Documents** page for a record—Any field on the **General** page that contains a user name, such as **Record** or **Author**. See Viewing or Editing General Information of a Document.
- **Tasks**—In the Tasks list view, click on a name in the **Assignee** column.

1.3.1.2 Creating a Contact

You can create a contact in one of many ways:

- Using a wizard—Your system administrator may provide one or more wizards to help you create new contacts using a guided, step-by-step process. If you click **New** and a wizard opens, complete the required fields on each page, and then click **Next** to progress to the end of the wizard. When you click **Finish** at the end of the wizard, the record is available in the list view.

  Your company may only allow you to create a contact using a wizard, so the option to create a contact manually may not be available.

- Copying an existing contact—TeamConnect allows you to create a contact by copying an existing contact, which is useful if you have contact records that may have different names, but similar properties. See Copying a Record and Duplicate Contacts for more information.
- Entering new contact information from the **General** page—If you click New and the General page opens, enter contact record information, as shown in the following procedure.

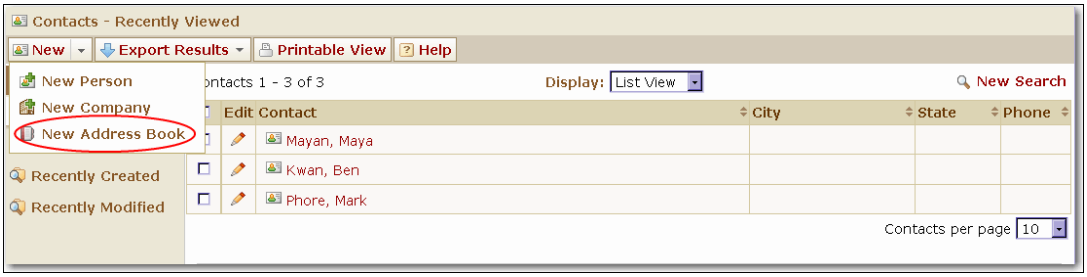
Once you create a contact, with the appropriate rights, you can edit the information in the contact record. See Editing a Record for more information.

Note: *Before you create a new contact, it is recommended that you perform a search to avoid creating duplicate contact records. See Searching for Specific Records.*

To create a contact

1. Click the **Contacts** tab.

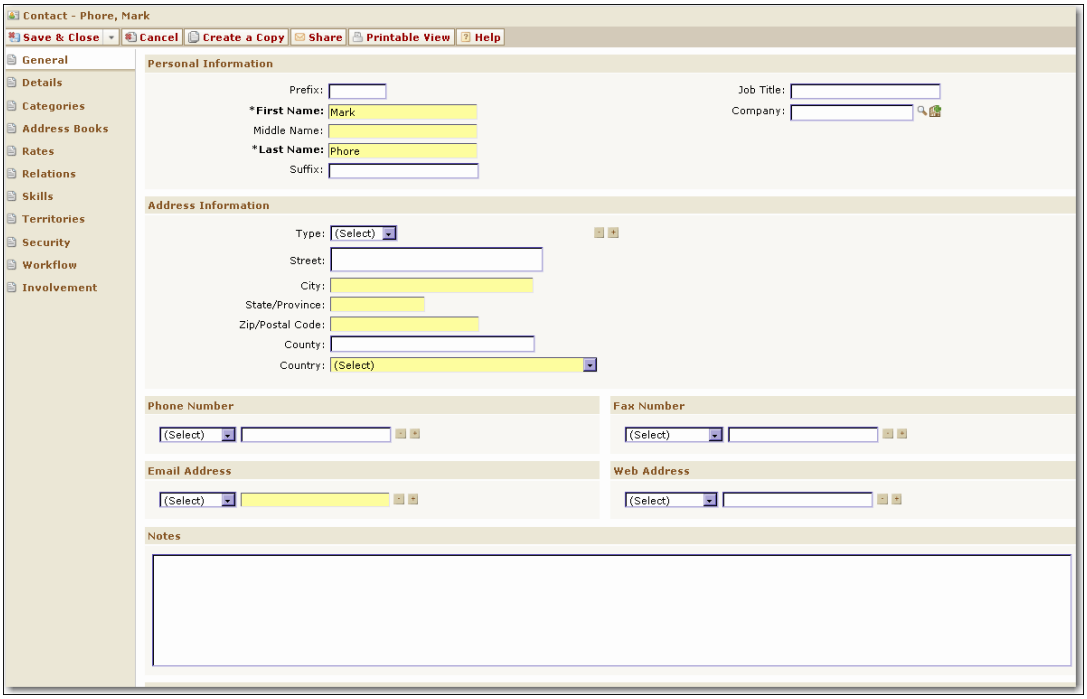
   The Contacts list view opens.



Contacts List View

2. Click the **New** drop-down, and then select **New Person** or **New Company**.

   The contact record opens to its **General** page.



Contacts General Page

3. On the **General** page, enter or edit the appropriate information. See the General page field descriptions for more information.

   Fields with an asterisk are required and must be completed before you can save this record.

4. To enter multiple addresses, phone, fax, web, and email addresses, select the + sign in the appropriate information block, and then enter the appropriate information.

   If you are entering multiple addresses, phone, fax, web and email addresses, a **Primary** radio button appears. Click the radio button that indicates the main information for this contact.

5. Use the links in the left pane to access the contact-specific pages:

   - **Details**—Enter or edit additional identification information, such as an employee ID, social security number, or Tax ID number.

     Custom fields may also appear on this page based on the selections you make on the **Categories** page. See Setting Contact Details and Setting Category Details.

   - **Rates**—Enter or edit the fees charged by a vendor for services rendered to your company. Rates may be automatically referenced when you are working with tasks and invoices. See Setting Contact Rates.

   - **Skills**—Enter or edit the skills that a contact possesses and indicate the level of expertise for each skill. See Setting Contact Skills.

   - **Territories**—Enter or edit the geographic areas where the selected contact conducts business. See Selecting Contact Territories.

   - **Involvement**—Add or edit a non-TeamConnect contact's role in a project, such as respondent, claimant, or witness. See Viewing Contact Involvement.

6. If necessary, use the additional contact pages to enter or edit supplementary information, such as historical details or relationships between contacts.
7. Select a save option.

Note: *If you get a Duplicate Contact message, see Duplicate Contacts for more information.*

The tables below contain the default fields for both person and company contacts. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Person and Company Information

Field (* = required)	Description
Company	The organization associated with this contact. Click the search icon, and then complete the search criteria to locate the appropriate company. If you cannot find the company that you want, click **New** to create it.
***Company Name**	The name of the company for which you are creating the contact record.
***First Name**	The contact's first name.
Job Title	The contact's job title. Maximum length = 250 alpha-numeric characters.
***Last Name**	The contact's last name.
Middle Name	The contact's middle name.
Prefix	The contact's salutation, such as Mr., Mrs., or Ms.
Suffix	The contact's suffix, such as Jr., III., or M.D.

Addresses

Multiple addresses are allowed for a contact.

Field	Description
City	The name of the contact's city.

Country	The name of the country that applies to the address in this block. This order of options in this list is based on your company preferences, so the countries may not be in alphabetical order.
County	The name of the county that applies to the address is this block.
Current as of	The date on which this address information is up-to-date.
State/Province	The abbreviation for the state or province that applies to the address in this block. Click the icon next to this field to select the appropriate state code or province, or enter the information manually. The items in this list are based on the **Country** you select and your company's preferences.
Street	The street number and name.
Type	The type of address, such as home or business.
Zip/Postal Code	The zip code that applies to the address in this address block.

Phone and Fax Numbers

Multiple phone and fax numbers are allowed for a contact.

Field	Description
Number	Type the phone number. ***Important:*** *Use a consistent format for all contacts, such as (nnn) nnn-nnnn.*
Type	Select the phone number type, such as home or business.

Email Address

Multiple email addresses are allowed for a contact.

Field	Description
Email	The email address for this contact, such as yourname@yourcompany.com. ***Note:*** *You can enter up to 250 alphanumeric characters, but only 28 characters will be visible in the field. To see the rest of the address, you have to scroll to the right.*

Type	Select the email address type; for example, business or personal.

Web Addresses

Multiple web addresses are allowed for a contact.

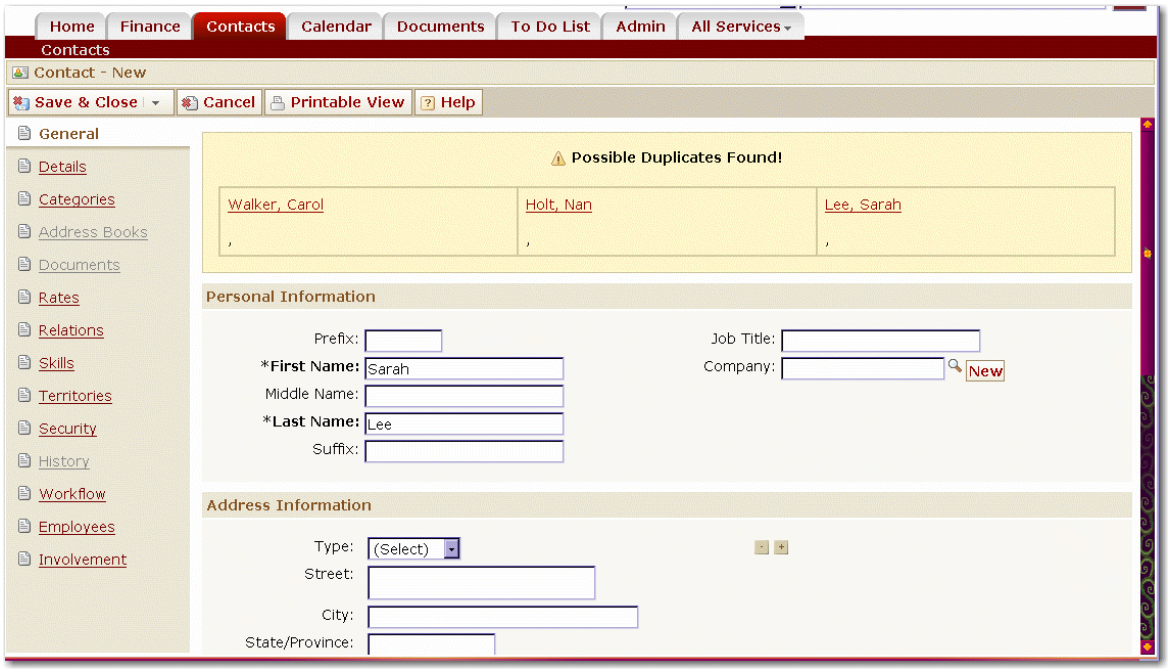
Field	Description
Address	The Internet address for this contact, such as www.yourcompanyname.com. You can enter up to 250 alphanumeric characters, but only 28 characters will be visible in the field. To see the rest of the address, you have to scroll to the right.
Type	The type of the Internet address, such as, business or personal.

Access Information

Field Name	Description
Created By	The name of the user who created the contact record.
Created On	The date that the contact record was added to TeamConnect.
Modified By	The name of the user who last modified the contact record.
Modified On	The date on which the contact record was modified.

1.3.1.3 Duplicate Contacts

If your system administrator enabled a duplicate contact check, when you select a save option, you may see a warning and a list of possible duplicate contacts.



Duplicate Contacts

Do one of the following:

- Review the duplicates to ensure that your contact is unique. If your new record is a duplicate, click **Cancel**.
- If you still want to save the new contact record, click the **Allow contact to be saved** check-box and complete the appropriate fields. See General page field descriptions for more information.

1.3.1.4 Setting Contacts Primary Information

Use the Contacts **General** page to designate the main contact information for a person or company.

Contacts can have several mailing, email, and Internet addresses, as well as several phone and fax numbers. Typically, the item that you add first in a section is set as the primary, so if you have multiple addresses and numbers, it is important that you designate which information is the main information.

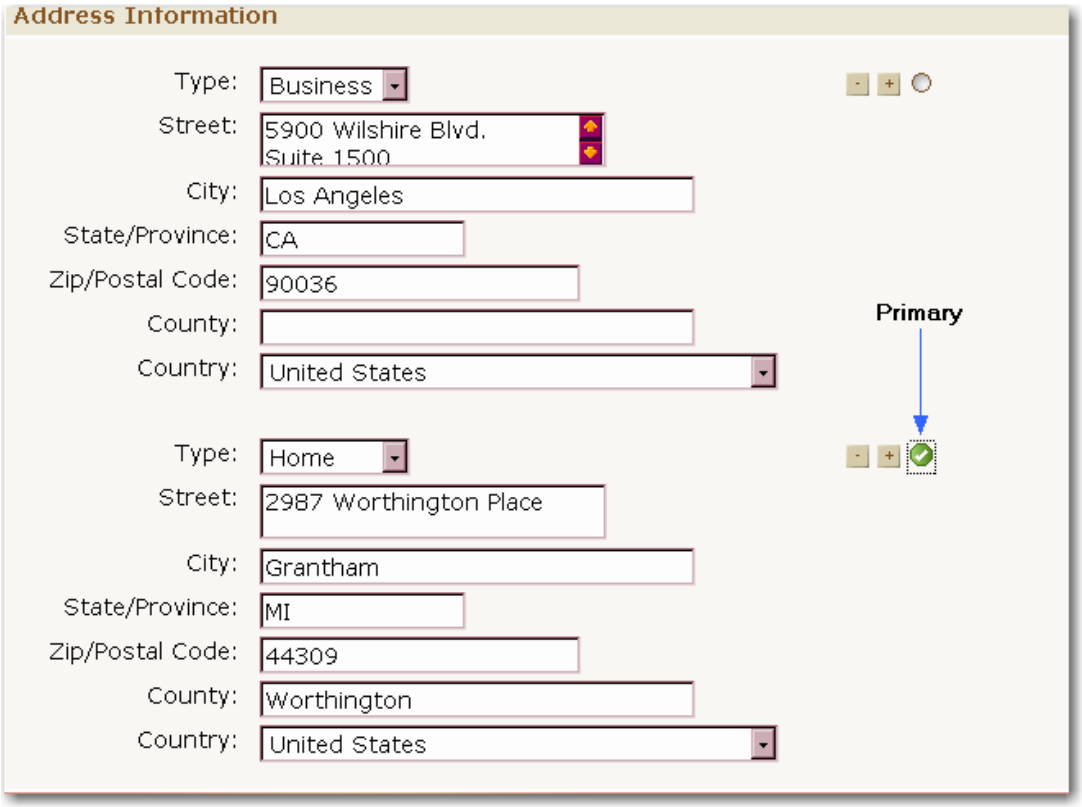
The primary items in each section are marked with a check mark in a circle, and this information is what is displayed on both the list view and card view.

You can change the designated primary entry at any time.

To set contact primary information

1. Search for a contact and open it.

2. In the left pane, click the **General** link.
3. Click **Edit**.
4. If necessary, click the **+** sign to add an empty text block, and then enter the new information.
5. Select the radio button next to the information that you want to designate as the primary information.



Contacts General Page with Primary Designation

6. Select a save option.

1.3.1.5 Setting Contact Details

Use the Contact **Details** page to view or edit additional contact identification information, such as an employee ID, social security number, or Tax ID number.

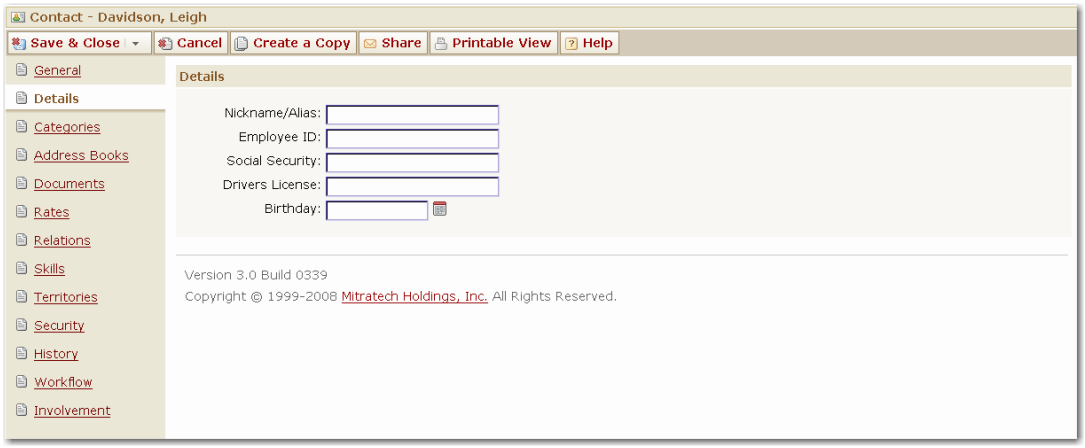
How Categories Affect the Details Page

In addition to the default fields, additional fields may appear based on the options you select on the **Categories** page and your access rights. These additional fields are called custom fields.

For example, if you select a category named *Adjuster* on the **Categories** page, and then return to the **Details** page, you may see fields that allow you to select the states in which the company is licensed, or the limits on payments that can be made on a claim without a supervisor's authorization. For a vendor, these fields are not relevant, so if you select **Vendor** on the **Categories** page, a different set of custom fields appear on the **Details** page, such as vendor type and payment method.

To set contact details

1. Search for a contact and open it.
2. In the left pane, click the **Details** page.



Contacts Details Page

3. View or edit the appropriate information.

   See the Details page field descriptions for more information.

   Based on the selections that you made on the **Categories** page, additional blocks of text may appear on this page. Review this page and complete any new fields, especially required fields. You cannot save this record if any required fields are blank.

4. Select a save option.

Details Page Field Descriptions

The tables below contain the default field information for person and company details. The fields that you see may vary based on your system settings, assigned rights, and the options you selected on the **Categories** page.

Field descriptions are listed in alphabetical order and may display in a different order in the application.

Details Page Field Descriptions

Field	Description
Birthday	The contacts birthdate. You can enter this date manually, or click the **Calendar** icon next to the field to open the calendar and select the desired date.
Company ID	The numbering system that your organization uses to identify a company. This may be pre-defined or you can enter it manually.

Drivers License	The contact's driver's license number, including the state and the number, for example CA A5306279.
Employee ID	The numbering system that your organization uses to identify an employee.
Nickname/ Alias	The name that the contact prefers other than their legal first name.
Social Security	The social security number for this person. ***Important:*** *Use the nnn-nn-nnnn format for the social security number.*
Tax ID	The tax identification number that applies to this company.

1.3.1.6 Adding and Removing Contacts Categories

Use the Contacts **Categories** page to assign a contact to a group that may describe the type of contact or its function. Categories are usually pre-defined by your system administrator.

Categories are displayed in a hierarchical view with the main categories at the top and related subcategories listed below each main category. For example, a main category named Employees may have subcategories under it named *Accountants*, *Paralegals*, and *In-house attorneys*. A main category named Non-Employees may have subcategories under it named Outside Counsel, Vendors, or Clients.

The categories that you see apply to the specific TeamConnect area that you are viewing and your specific rights.

How Categories Affect the Details Page

In addition to categorizing contacts, the categories that you select may cause additional information fields to appear on the **Details** page. These new fields may be required and if left blank, you are not able to save the record.

For example, if you select the *Internal Employees* category, and then select the *Attorney* category, when you return to the **Details** page, you may see custom fields that allow you to enter information about the attorney's specialty, home office, and current projects.

When you select a category, it is recommended that you return to the **Details** page to check for required fields.

See Setting Category Details for more information.

1.3.1.7 Viewing the Address Books for a Specific User

Use the **Address Books** page to view the address books that the contact is part of.

Tip: *In previous versions of TeamConnect, Address Books were referred to as Contact Groups.*

To view the address books for a specific user

1. Search for a contact and open it.
2. In the left pane, click the **Address Books** link.

The Address Books page opens and displays the names of the address books to which the selected user is a member.

1.3.1.8 Setting Contact Rates

Use the Contacts **Rates** page to view or edit the standard rates charged by a contact, the rate that is charged for non-standard tasks, the rate for an invoice task, and the preferred type of currency. The options that you see on this page depend on your access rights.

There are three types of rates:

- **Default—**The standard rate and currency that is used for a vendor for most of the services rendered to your company. This rate applies unless a specific task-based or invoice task rate is defined.
- **Task-based—**The rate that appears when you create a Task or add an entry to the Task Entry Tool. If defined for a contact, this rate overrides the default rate during the specified time period. See Assigning or Reassigning Tasks to Users for more information about tasks.
- **Invoice task rates—**The rate that applies to a specific task on an Invoice when the associated contact is selected as a timekeeper. If defined, this rate overrides the default rate during the specified period of time.

Each type of rate can have multiple entries with specific start and end dates for each entry.

Important: *Information that is defined in each section is completely separate from other sections on the Rates page. For example, rates and dates defined in the Task section do not affect or apply to rates and dates defined in the Invoice Task Rates section.*

Notes for Rates

- If you define a rate with no start or end date, you cannot add any other rates in that specific rate area. For example, if you define a task rate with no start or end date, you cannot define other task rates.
- If you enter a start date and the end date is blank, the rate starts on the date specified and the end date is indefinite.
- If the start date is blank, and you enter an end date, the rate applies to any date that is less than, or equal to the end date.
- If a contact has multiple rates in a specific area, such as invoice rates, overlapping date ranges are not allowed. For example, for the same contact, if one invoice rate has a start date of 3/16/09 and an end date of 4/16/09, and a different rate has a start date of 3/17/09 and an end date of 4/17/09, an error message appears and you must correct the overlapping dates.

How Rates Affect Invoice and Task Records

The rates that you enter on this page also apply to other areas in TeamConnect:

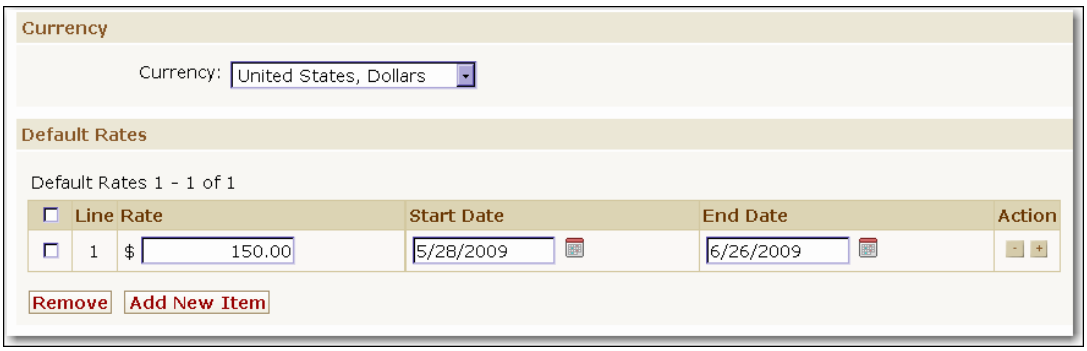
- **Invoices—**
  - If an invoice is created for this contact, the type of currency that you enter on the contact Rates page is automatically used as the currency on the associated invoice. See Viewing Invoices for more information.
  - If a contact typically bills your company for services, the Invoice Task Rate that you enter on the contacts Rates page is automatically added to an invoice line item when the associated contact is selected as a timekeeper and the item type is Fee. See Timekeeper Rates for more information.

    More text
  - Another long sentence Another long sentence Another long sentence Another long sentence Another long sentence Another long sentence Another long sentence Another long sentence Another long sentence Another long sentence Another long sentence Another long sentence
- **Tasks—**Tasks can be billable time items that are tracked by their hourly rate. The rate information on the Rates page will auto-populate the Rate field for tasks assigned to this contact. The Default Rate is used to auto-populate Rate fields if a task does not have a current rate assigned to it.

To set a default rate

1. Search for a contact and open it.
2. In the left pane, click the **Rates** link.

   The **Rates** page opens.
3. Click **Edit**.



Contacts Rates Page - Default Rate Section

4. If necessary, in the **Currency** drop-down list, select or change the type of currency that applies to this contact, for example, **United States, Dollars**. See the Rates page field descriptions for more information.

5. In the **Default Rates** section, in the **Rate** field, enter or edit the standard rate charged by this contact for most services.
6. If necessary, in the **Start Date** and **End Date** fields, enter the period during which this rate applies.

   If you do not enter a start and end date, the default rate is applied indefinitely to related invoices and tasks.
7. If you want to add additional task-based rates, click the **Add New Item** button and repeat steps 5 and 6.
8. Select a save option.

When you are working with billable tasks and invoices, this rate is used as the default rate unless a specific task-based or invoice based rate is defined. See Tasks for more information.

To set a task-based rate

1. Search for a contact and open it.
2. In the left pane, click the **Rates** link.
3. Click **Edit**.

Contacts Rates Page - Task-based Rates Section

4. In the **Task Rates** section, on the **Task** drop-down list, select the task to which the selected rate applies.
5. In the **Rate** field, enter the rate charged by the contact for this specific task.
6. If necessary, in the **Start Date** and **End Date** fields, enter the period during which this rate applies.
7. If you want to add additional task-based rates, click the **Add New Item** button and repeat steps 4 through 6.

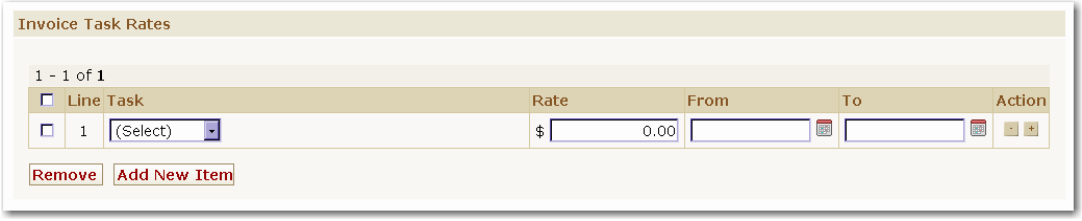
   See the Rates page field descriptions for more information.
8. Select a save option.

When you are working with a billable task, this rate overrides the **Default Rate** only during the specified time period.

To set an invoice task rate

1. Search for a contact and open it.
2. In the left pane, click the **Rates** link.

3. Click **Edit**.



Contacts Rates Page - Invoice Task Rates Section

4. In the **Invoice Task Rates** section, on the **Task** drop-down list, select an option.
5. In the **Rate** field, enter the rate charged by the contact for this specific task.
6. If necessary, in the **Start Date** and **End Date** fields, enter the period during which this rate applies.
7. If you want to add additional task-based rates, click the **Add New Item** button and repeat steps 4 through 6 as necessary.

   See the Rates page field descriptions for more information.
8. Select a save option.

When you are working with invoices, this rate overrides the **Default Rate** during the specified time period.

To remove a rate

To remove a rate, see Deleting an Entry.

Rates Page Field Descriptions

The tables below contain the default fields for the **Rates** page. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Rates Page Field Descriptions

Field	Description
Add New Item	Adds a new, blank rate row.
Currency	The currency used for payments to this contact. ***Notes:*** • The currency that you select is displayed in the **Currency** field of the Invoice screen when this contact is selected as a vendor.

	• The **Billing Information** section in task and expense records cannot use multiple currencies, and contacts who are also users may be responsible for the costs associated with these records. • The selected currency is reflected in the contact's rates and in any custom fields for financial amounts in the contact record. • Changing the currency selected in this field for an existing contact does not change the rate amounts for the contact. When changing the currency of the contact, you must also adjust the rate amounts. • Changing the currency of the contact does not affect any existing invoices where that contact is selected as the vendor. The currency and amounts in those invoices stays the same.
Rate	The rate that applies to the selected task or invoice. For Tasks and Invoice line items, this value is automatically displayed in the **Rate** field when you select a category.
Remove	Removes the selected line item from the **Rates** page. Click the appropriate check-box, and then click **Remove**.
Start Date/ End Date	**Start Date—**The earliest date that this rate is applicable. **End Date—**The latest date that this rate is applicable. Click the **Calendar** icon to select a date. ***Notes:*** • If you define a rate with no start or end date, you cannot add any other rates in that specific rate area. For example, if you define a task rate with no start or end date, you cannot define other task rates. • If you enter a start date and the end date is blank, the rate starts on the date specified and the end date is indefinite. • If the start date is blank, and you enter an end date, the rate applies to any date that is less than, or equal to the end date. • If a contact has multiple rates in a specific area, such as invoice rates, overlapping date ranges are not allowed. For example, for the same contact, if one invoice rate has a start date of 3/16/09 and an end date of 4/16/09, and a different rate has a start date of 3/17/09 and an end date of 4/17, an error message appears and you must correct the overlapping dates.

1.3.1.9 Relating Contacts

Use the Contacts **Relations** page to view or establish the relationships between a contact and other people or companies, for example, plaintiff-to-defendant, spouse-to-spouse, or employee-to-company. A contact may have several different relationships with other contacts and more than one relationship with the same contact.

After you create a relationship between contacts in one record, the related contact's **Relations** page is automatically updated with the same information.

With the appropriate rights, you can view, edit, and delete relations for a contact.

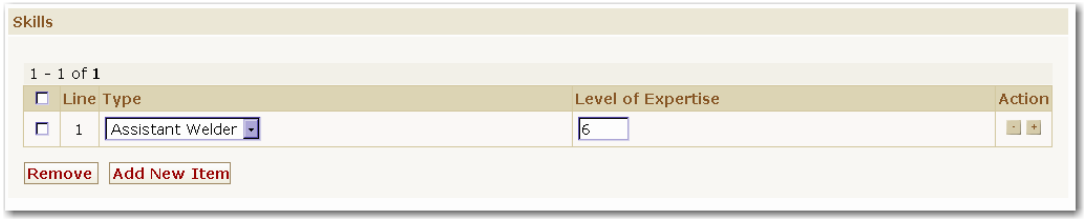
See Working with Related Records for more information.

1.3.1.10 Setting Contact Skills

Use the Contacts **Skills** page to define a contact's skill set, and indicate the level of expertise for each skill. Skills associated with contacts can help you identify the best person or company for a specific task.

To set contact skills

1. Search for a contact and open it.
2. In the left pane, click the **Skills** link.



Contacts Skills Page

3. Select one of the following options:
   - To add a new skill, in the **Type** drop-down, select the desired **Type** of skill, and then type a number to indicate the corresponding **Level of Expertise**.
   - To edit a skill, in each data entry row, change the desired **Type** of skill, and/or the number that indicates the corresponding **Level of Expertise**.
4. To add an additional skill, click **Add New Item** and repeat step 3 until you've added all of the appropriate skills for this contact.
5. Select a save option.

To delete contact skills

To delete skills for a contact, see Deleting an Entry.

1.3.1.11 Selecting Contact Territories

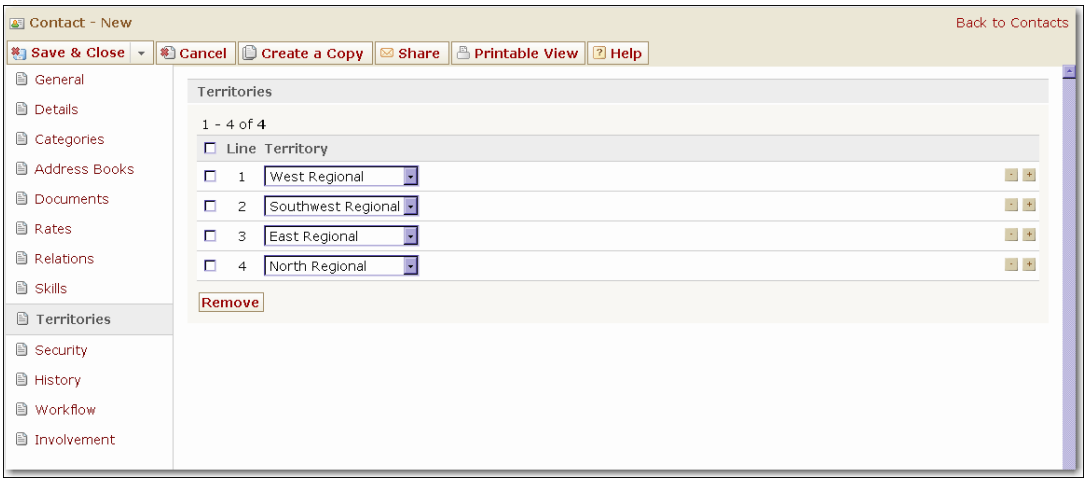
Use the Contacts **Territories** page to select the geographic areas where the selected contact conducts business. A contact may be associated with several territories.

Based on your assigned rights, you can view, edit, and remove territories.

To select contact territories

1. Search for a contact and open it.
2. In the left pane, click the **Territories** link.

   The **Territories** page opens.



Contacts Territories Page

3. In the **Territory** column, use the drop-down list to select the contact's territory.
4. To add an additional territory, click **+** in the **Action** column or click **Add New Item**, and then select the necessary information.
5. Select a save option.

To delete contact territories

To delete territories for a contact, see Deleting an Entry.

1.3.1.12 Viewing Company Employees

Use the Contacts **Employees** page to view a list of employees for a selected company. This list is automatically generated from contact records when you select a company in the Company field on the General page for a person.

Note: *This page is only visible for company contacts.*

To view company employees

1. Search for a company contact and open it.
2. In the left pane, click the **Employees** link.

   The employees that are associated with this company are listed.

Contacts Employees Page

1.3.1.13 Viewing Contact Involvement

Use the Contact **Involvement** page to view information about people or companies who are involved in a project. These non-TeamConnect users are referred to as Involved Parties and their roles may vary, such as opposing party, outside counsel, claimant, witness, law firm, or attorney.

For example, Beth files a lawsuit against Jerry. An internal lawyer in your organization is assigned to the lawsuit and is responsible for it. Both Beth and Jerry are involved parties with roles - Beth's role is plaintiff and Jerry's role is defendant. Neither Beth nor Jerry is assigned to the project, but it is important that the details of their involvement is available to those assigned to the project.

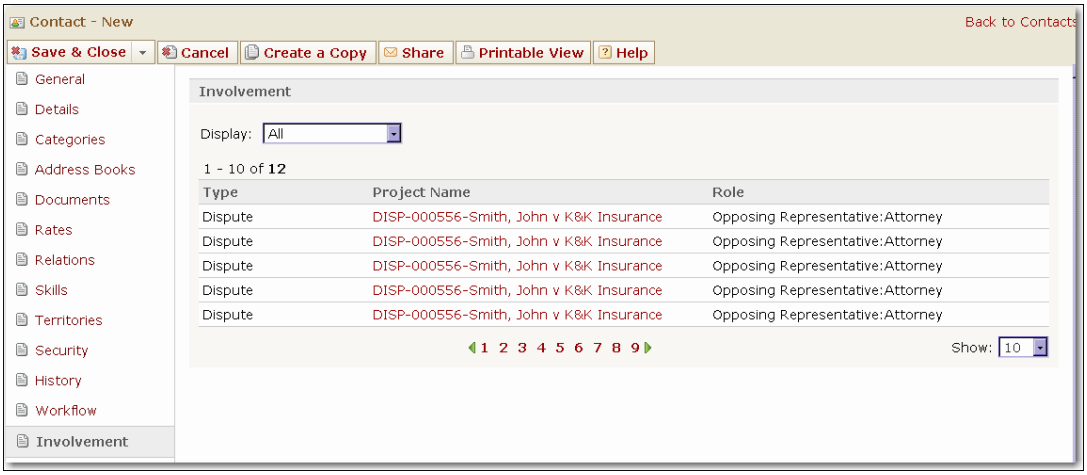
If a contact is involved in several roles in a project, only one project entry displays on the **Involvement** page with the default role for the contact.

Note: You cannot modify involved parties on this page; you must open the related project to make any changes. See Managing Involved Parties for Projects for more information.

To view contact involvement

1. Search for a contact record and open it.
2. In the left pane, click the **Involvement** link.

   The **Involvement** page opens.



Contacts Involvement Page

3. If necessary, use the **Display** drop-down list to view a list of specific contact records.

   You can view the project type, project name, and the role that a contact has in a project.

   Contacts may have more than one role in the same project, or may be involved in many different projects, so you may see more than one listing on this page.

Involvement Page Field Descriptions

The tables below contain the default fields. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Involvement Page Field Descriptions

Field	Description
Application	The applications for each project in which the selected contact is involved.
Project Name	All projects for the selected application. Click the individual project name link to view the corresponding detailed information.
Role	The contact's roles in each project.
Show Involved Projects For	The application for which you want to view the contact's involvement. ***Note:*** *If you want to see all projects the contact is involved in, select the default option* ***All****.*

1.3.2 Address Books

If you have a large number of contact records in your system, you may want to organize them into address books so that you can quickly communicate with everyone in the group at one time. For example, you can create a group of your colleagues and add the group as attendees to an appointment, or send a document to everyone in the address book.

You can find all address books that you created and subscribe to in the left pane under the **Contacts** tab. The address book icon indicates the address book icon.

Address Books in the Contacts Left Pane

The following table shows how you can view, create, and use address books.

...Address Books	How...
Viewing	• Viewing Contacts in an Address Book • Printing Records
Creating	• Creating an Address Book • Making an Address Book Public or Private
Updating	• Adding Contacts to an Address Book • Removing Contacts from an Address Book • Deleting Records
Utilizing	• Subscribing to Address Books

Best Practices for Address Books

When you create and save an address book, make sure to specify the correct **Public** or **Private** designation. See Making an Address Book Public or Private for more information.

1.3.2.1 Subscribing to Address Books

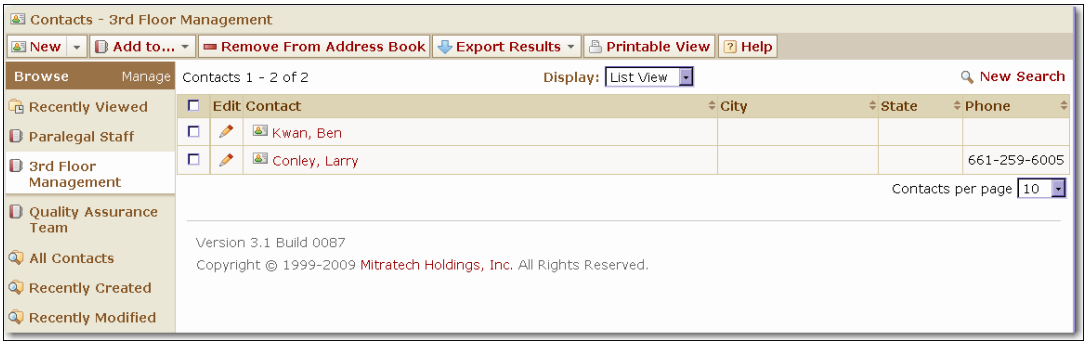
Use the **Manage List** page to subscribe to the public address books.

Public address books are available for all users to use and view. Public address books may contain contacts with whom you have regular contact, such as all of the people who are involved in a project to which you are assigned. You access a public address book by subscribing to it. Once you subscribe, you can access the address book, but you cannot make changes to it unless you have been granted rights to do so by the person who created it. See Working with Record Security for more information.

The Address Books to which you subscribe appear on the **Contacts** list page in the left pane and are indicated by the address book icon . You can change the order in which the contact collections and address books are listed in the left pane, and remove those that you no longer need. See Managing Collections for more information.

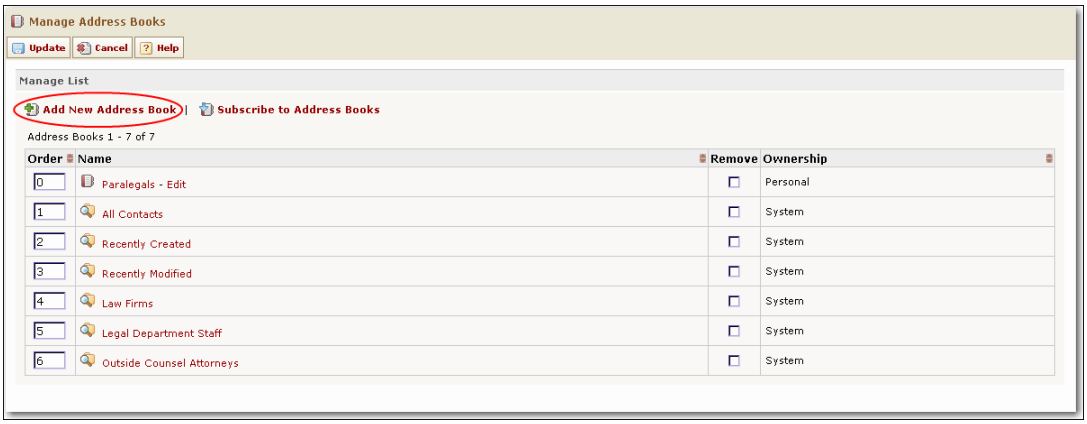
To subscribe to public address books

1. Click the **Contacts** tab.
2. In the left pane, click **Manage**.



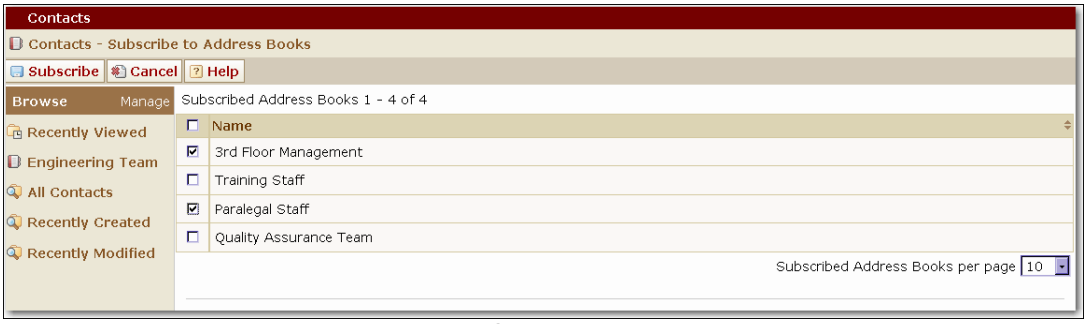
Address Books Manage Link

3. On the **Manage List** page, click **Subscribe to Address Books**.



Manage List Page - Subscribe to Address Books

4. Select the address books to which you want to subscribe, and then click **Subscribe**.



Manage List Page - Subscribe to Address Books

Note: *If you have several pages of address books, you can only select and subscribe to the address books that are visible on the current page. To select and subscribe to address books on a different page, you must go to that page and separately select and subscribe to different address books. Increase the number in the* ***Subscribed Address Books per page*** *drop-down to view more address books per page.*

The selected address books appear on the **Contacts** list page in the collections pane.

1.3.2.2 Viewing Contacts in an Address Book

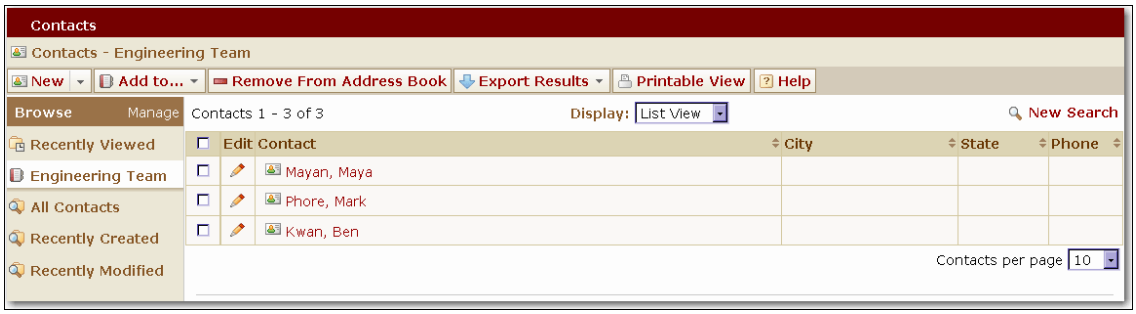
You can view the contacts in an address books that you created, address books to which you subscribe, and all public address books.

You can also see a list of address books to which a contact belongs. See Viewing the Address Books for a Specific User for more information.

To view contacts in an address book

1. Click the **Contacts** tab.
2. Select one of the following options:
   - If the address book whose contacts you want to view is visible in the left pane, click its link. The contacts are displayed in the list view.
   - If the address book is not visible in the left pane, click the **Manage** link. On the **Managed List** page, click the link of the appropriate address book.

For either option, the address book opens and you can view its contacts.



Contents of an Address Book

1.3.2.3 Creating an Address Book

Address books let you organize person and company contacts into groups that you use frequently. You can use an address book to send messages to a group of people, or to send a meeting invitation to a group of users.

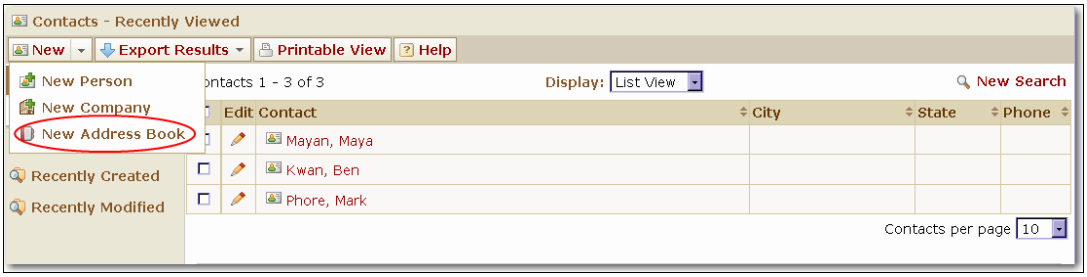
You can create address books in two ways:

- The **New** button on the Contacts list view
- On the **Address Books Manage List** page

By default, address books that you create are private.

To create an address book on the contacts list view

1. Click the **Contacts** tab.
2. Click **New**, and then select **New Address Book**.



New Address Book

The **Address Book General** page opens.

Address Book General Page

3. In the **Name** field, enter the name of this address book.
4. Select one of the following options:
   - Select the **Public** box if you want other users to have access to this address book.
   - Leave the **Public** check-box unchecked if you do not want others to have access to this address book.

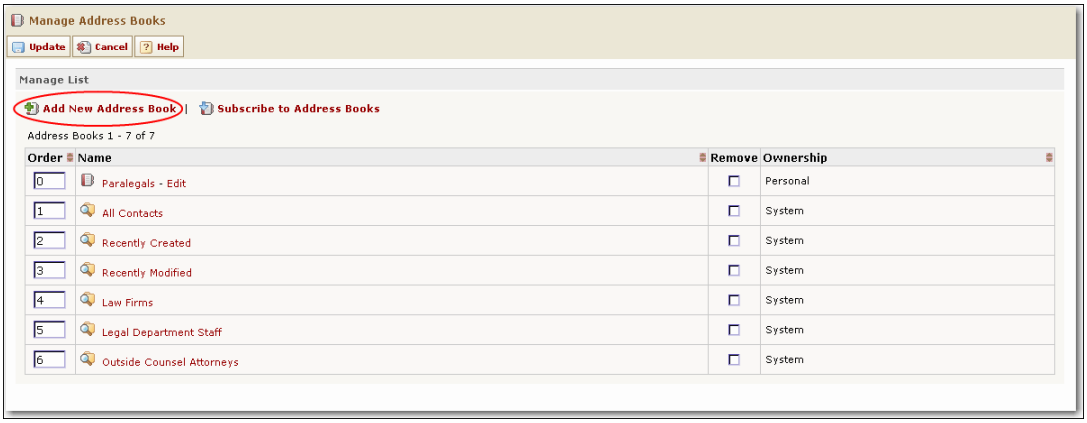
     Once you mark an address book **Public** or **Private**, you cannot change this setting. If necessary, you can delete the address book, and add it again with the appropriate designation.

5. Click **Save**.

   You return to the **Manage Address Books** page and your address book appears in the list.

To create an address book on the manage list page

1. Click the **Contacts** tab.
2. In the left pane, click the **Manage** link.
3. On the **Manage List** page, click **New Address Book**.



Manage List Page - Add New Address Book

4. In the **Name** field, enter the name of this address book.
5. Select one of the following options:
   - Select the **Public** box if you want other users to have access to this address book.
   - Leave the **Public** check-box unchecked if you do not want others to have access to this address book.
6. Click **Save**.

   You are returned to the **Contacts** list view and your address book appears in the left pane.

To add users to address books, see Adding Contacts to an Address Book.

1.3.2.4 Adding Contacts to an Address Book

Use the Contacts list view to add individual contacts or company contacts to the address books that you created or address books to which you have the appropriate rights. You can add a single contact or multiple contacts at the same time.

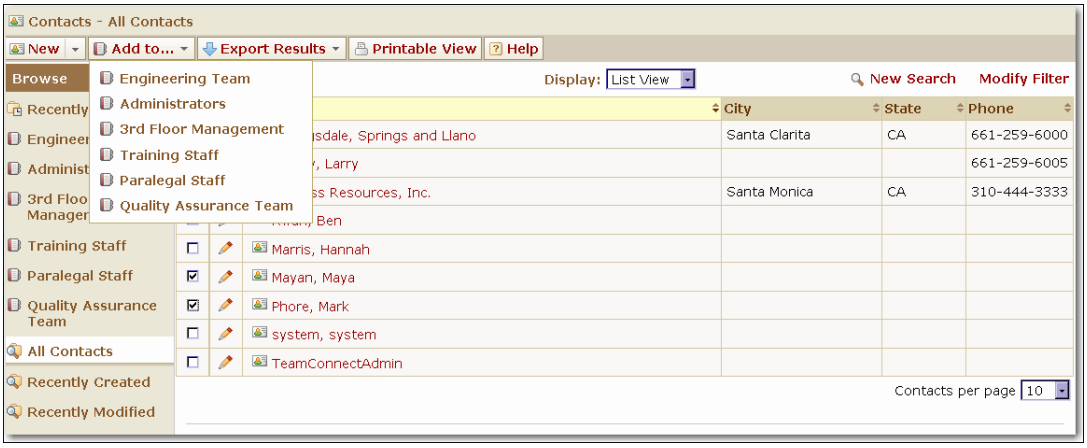
To add contacts to an address book

1. Click the **Contacts** tab.

2. In the left pane, select the collection or address book that contains the contacts that you want to add to the selected address book.

   Tip: *Click the* ***All Contacts*** *link to view all of the contacts that you have rights to view and all of the contacts that you created.*

3. Select the check-boxes of the contacts that you want to add to the address book.



Add Users to an Address Book

4. Click **Add to**, and then select an address book from the drop-down list.

   The selected contacts are added to the selected address book.

1.3.2.5 Removing Contacts from an Address Book

You can remove contacts from address books that you created or address books to which you have appropriate rights. You can remove a single contact or multiple contacts at the same time.

To remove contacts from an address book

1. Click the **Contacts** tab.
2. In the left pane, click the appropriate address book.
3. Select the contacts that you want to remove, and then click **Remove from Address Book**.

   The selected contacts are removed from the address book, but not from TeamConnect.

1.3.2.6 Making an Address Book Public or Private

There are two types of address books:

- **Private—**By default, when you create an address book, it is private. A private contact group is only accessible to the user who created it and to TeamConnect administrators. Private address books are useful for organizing contacts for your personal use and reference.

- **Public—**Public address books may be viewed, and subscribed to, by other users in addition to the user who created the book. When you subscribe to an address book, its link appears in the left pane along with the collections links.

You cannot change the designation of an address book once you set it. If necessary, you can delete the address book, create it again and give it the appropriate **Public** or **Private** designation. See Creating an Address Book for more information.

1.4 Projects

Projects, also referred to as matters, let you organize, compile, and manage the details of an incident or event from the beginning to its conclusion. Details may include information about the people involved, all relevant dates, and tasks that must be completed, users and specialists assigned to the project, and all of the related documents.

Use Case for Projects

For example, if you want to manage an accident claim, you can perform some or all of the following actions:

1. Create a new project to capture relevant facts, such as the date and location of the accident, vehicle information, witnesses, and the law enforcement officers who were at the scene.
2. To move the project forward, you may want to assign internal staff members to perform specific tasks, such as visiting the claim site or interviewing claimants.
3. You can schedule regular status meetings using the appointment calendar to determine if the project is on schedule or if the completion date needs to be extended.
4. You can create invoice and expense records from the project to track the costs related to the project.
5. If litigation is involved, you can add all of the relevant court documents to the project.

When all of the tasks are done, the reports are filed, and the claim or court case is resolved, you can close the project so that the assigned resources can move on to other projects.

Using Projects

The following table shows how you can view, create, and edit projects.

...Projects		How...
Creating		• Creating a New Project • Creating Child Projects • Creating Embedded Projects • Adding or Removing Project Categories
Updating	Phases	• Changing Project Phases

	Assignees	• Adding Assignees to Projects • Changing the Primary Assignee for a Project
	Relations	• Creating Relationships between Projects
	Involved Parties	• Adding or Editing Involved Parties • Changing an Involved Party Role
	Tasks	• Adding Tasks to Projects
	Appointments	• Adding Appointments to Projects
	Expenses	• Adding Expenses to Projects
	Accounts	• Adding Accounts to Projects

Project-specific Pages

Most projects have the following project-specific pages where you can view and edit information:

- **General—**View, enter and edit general information about the project, such as its name, number, when it was opened, and its current phase.
- **Phases—**View and change the phase of the project to show the progress from the beginning to the end of the project.
- **Assignees—**View or edit the users who are assigned to the project and their roles in the project.
- **Involved—**View or edit the people or companies who are involved in the project with roles such as witness, plaintiff, or outside counsel.

Each project record also has several other pages where you can view, enter, and edit additional information that applies to a project, such as appointments, expenses, and categories for a project.

Opening a Project Record

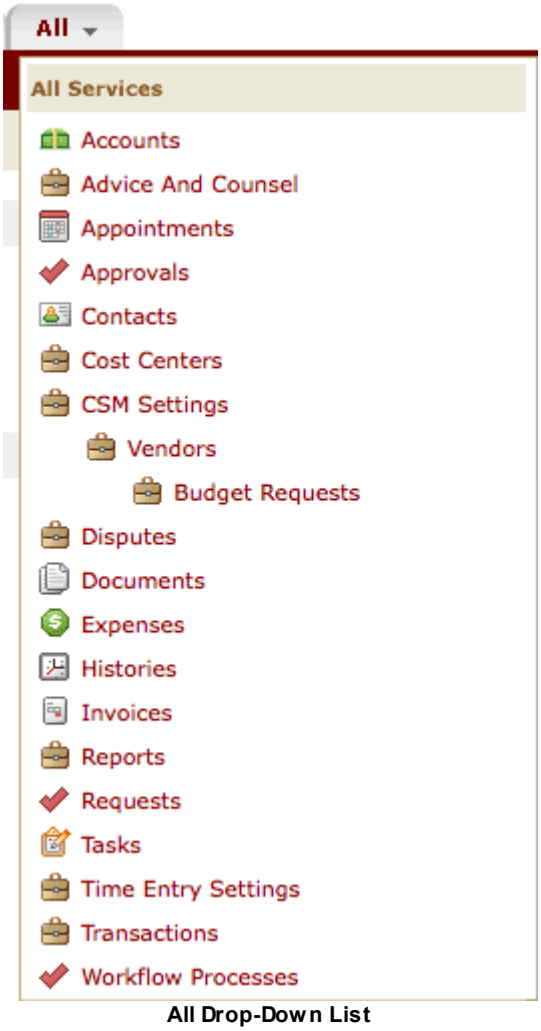
To open a project, click its link. The project opens to its **General** page. Once you open a project, with the appropriate rights, you can use the links in the left pane to manage project information.

1.4.1 Creating a New Project

You can create a new project by entering data into a blank project record or using a wizard.

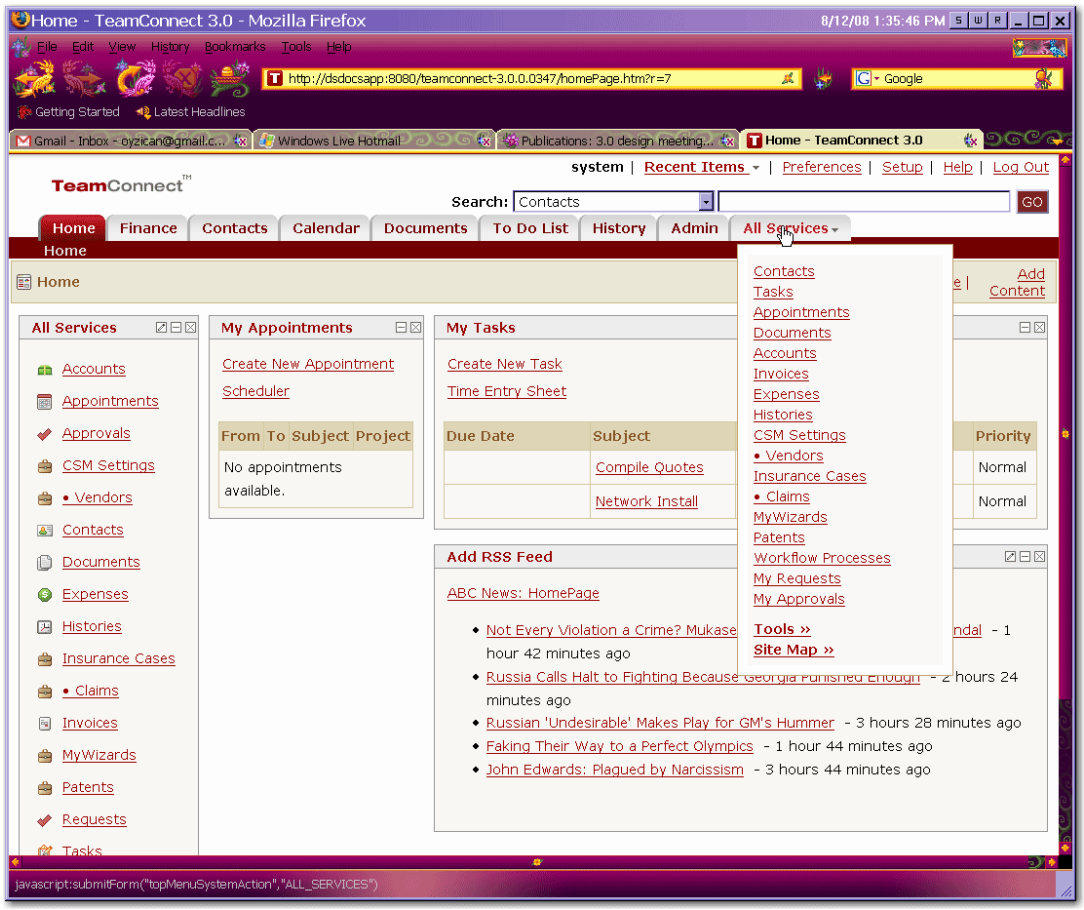
To create a project

1. Click the **All** tab, and then select the type of project that you want to create, such as **Insurance Cases**.



All Drop-Down List

You can access projects on the **All** tab, but your system administrator may have also provided a customized way for you to access projects, such as a portal pane on your home page.



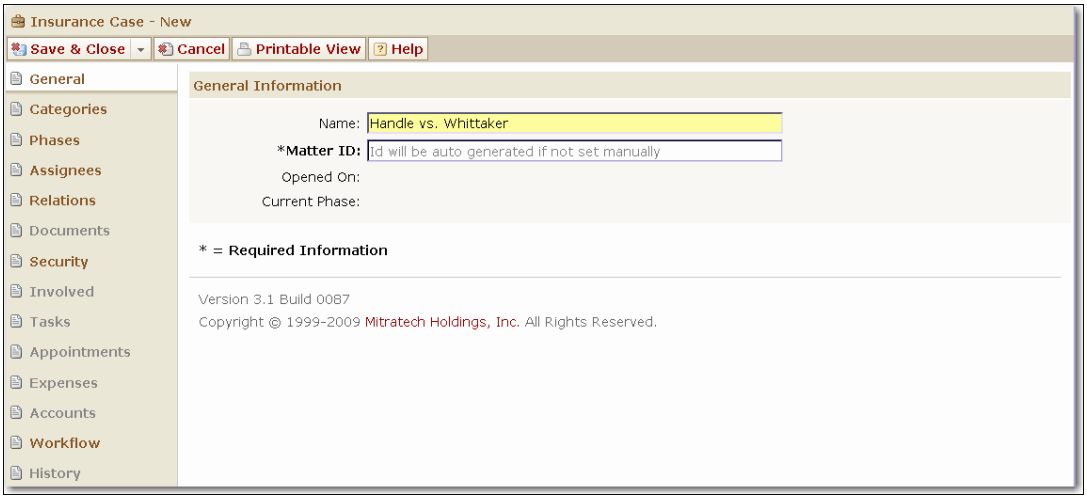
All Drop-Down List

2. On the project list page, click the **New** drop-down and select an option.

Creating a New Project

3. Complete the fields, depending on the option you selected:

   - If you select a wizard, denoted by the icon, the wizard opens. When the wizard opens, complete the required fields on each page, and then click **Next** to progress to the end of the wizard. When you click **Finish** at the end of the wizard, the record is available in the appropriate list view and collection.
   - If you do not select a wizard, the project record opens to its **General** page. Enter the appropriate data in the available sections and select a save option. See General page field descriptions for more information.



Projects General Page

Project General Page Field Descriptions

The tables below contain the default fields for projects. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

General Information Field Descriptions

Field (* = required)	Description
Closed On	Date and time when the record was closed. This information only displays when the phase is changed to Close. See Changing Project Phases.
Current Phase	The current phase of the project.
***Name**	The name of this project. If you see **(Auto)** displayed in the **Name** field, projects of this type are named automatically. ***Note:*** *If one of the fields used in the automatic naming sequence is changed, the name of the project may change. For example, if the* ***Contact*** *field is used for naming projects and you select a different contact, the project name will change when you save the record.* If you do NOT see **(Auto)** displayed in the **Name** field, type a descriptive name according to your organization's standards.

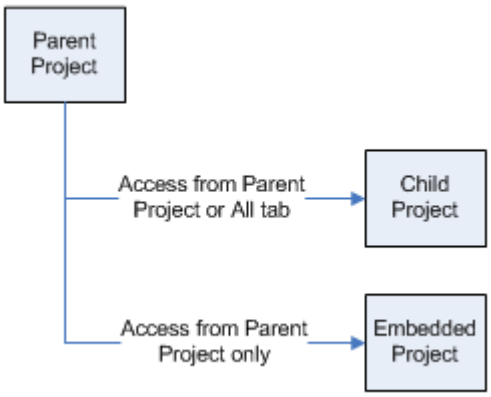
Project ID	The number assigned to this project. If you see **(Auto)** displayed in the **Number** field, projects of this type are numbered automatically. If you do NOT see **(Auto)** displayed in the **Number** field, type a number according to your organization's standards. ***Note:*** *After you save the record, you may not be able to change this number.*
Opened On	Date and time that the record is opened. These values are set automatically when the project record is created.
Parent Project	If applicable, this is the project that you want to set as a parent for this record. Click the search icon to locate the appropriate project. ***Note:*** *This field is available only for those projects that can have other projects as parents.* In Read-only mode, this field is displayed as a hyperlink to the selected project.

Access Information Field Descriptions

Field Name	Description
Created By	The name of the user who created this project. To view the associated contact record, click the link in this field.
Created On	The date and time that the project was added to TeamConnect.
Modified By	The name of the user who last modified the project. To view the associated contact record, click the link in this field.
Modified On	The date on which the project was last modified.

1.4.2 Creating Different Types of Projects

Some projects may not exist independently and always require a parent project. The following diagram illustrates the different types of projects.



Child Projects—You create child projects the same way you create parent projects. The only difference is that child projects require a parent project. See Child Projects for more information.

Embedded Projects—Embedded projects are child projects that you can only access from within their respective parent projects. In addition, you cannot search for embedded projects. See Embedded Projects for more information.

1.4.2.1 Child Projects

Some projects cannot exist independently, so they become child projects of parent projects. While a child project can only have one parent project, a child project can be a parent for other projects.

For example, if you file a claim in the insurance industry, your adjuster uses your original insurance policy to connect to the new claim. The policy is the parent record and the claim is the child record.

To create a child project

- From the **All** tab, find the child project under its parent project. Create a new project using Creating a New Project.
- Open an existing project and select another existing project as a parent in the **Parent** field on the **General** page. The project in the **Parent** field automatically becomes the parent project.
- Add a new child project from an existing parent record. The original project automatically becomes the parent project.

1.4.2.2 Embedded Projects

Like involved records, embedded projects are child projects that you can only access or create from within their respective parent projects. Embedded projects never display in the **All** list and you cannot perform a search to locate them.

Caution: *You cannot save embedded projects without saving their respective parent records.*

Embedded projects have a number and a name to identify them and can be associated with a specific contact, such as a doctor in a medical report, or an arbitrator in an arbitration.

Unlike regular or child projects, embedded projects do not have the following:

- Involved parties
- Milestones
- Accounts
- Tasks
- Child projects
- Assignees
- Phases
- Wizards

To create an embedded project

1. Open the parent record to which you want to add the new embedded project.
2. Open the section of the record that displays embedded projects of the appropriate type, such as **Agreements** in a Contract.
3. Click the New button to create an embedded project. See Creating a New Project for more information about creating a new project.
4. Select a save option to save the parent project.

1.4.3 Editing a Project

With the appropriate rights, you can edit a project at any time.

To edit a project

1. Click the **All** tab, and then click the project type that you want to edit.

   The project list view opens.

Project List View

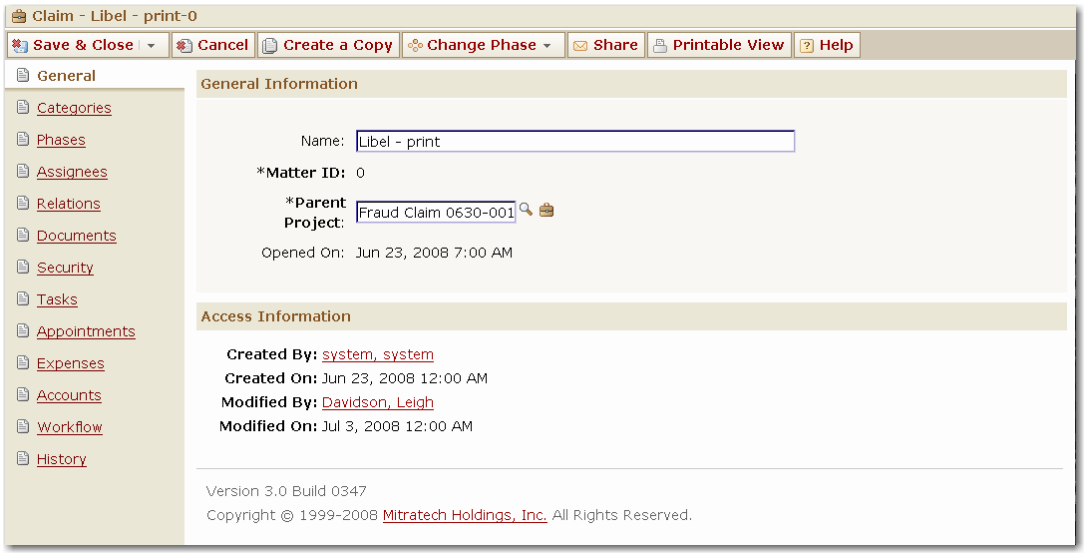
2. Click the link for the project that you want to edit.

   The project opens to its **General** page.

Projects General Page

3. Click **Edit**.

   The **General** page opens in edit mode.



Projects General Page in Edit Mode

4. Make the appropriate changes to the **General** page. See the General page field descriptions for more information.
5. Click a link in the lift pane to make the appropriate changes to any additional project pages.
6. Select a save option.

1.4.4 Adding or Removing Project Categories

Use the **Categories** page to assign a project record to a grouping that may describe its type or purpose. Categories are usually pre-defined by your system administrator and each category may include one or more subcategories. Subcategories are listed under the main category in a drop-down list.

How Categories Affect the General Page

Categories are also associated with groups of custom fields that appear or disappear based on the categories that you select. If defined, these custom fields appear on the **General** page, in the **Details** section.

For example, you may have a project that you assigned to a category named Medical Malpractice. Once you assign a project to this category, the **Details** section on the **General** page may display custom fields that allow you to enter details about the incident, such as the name of the doctor, the date the incident occurred, and the name and location of the hospital.

Based on your access rights, you can view, add, change, or delete categories.

See Setting Category Details for more information.

1.4.5 Changing Project Phases

Use the **Change Phase** button to change the phase of a project record.

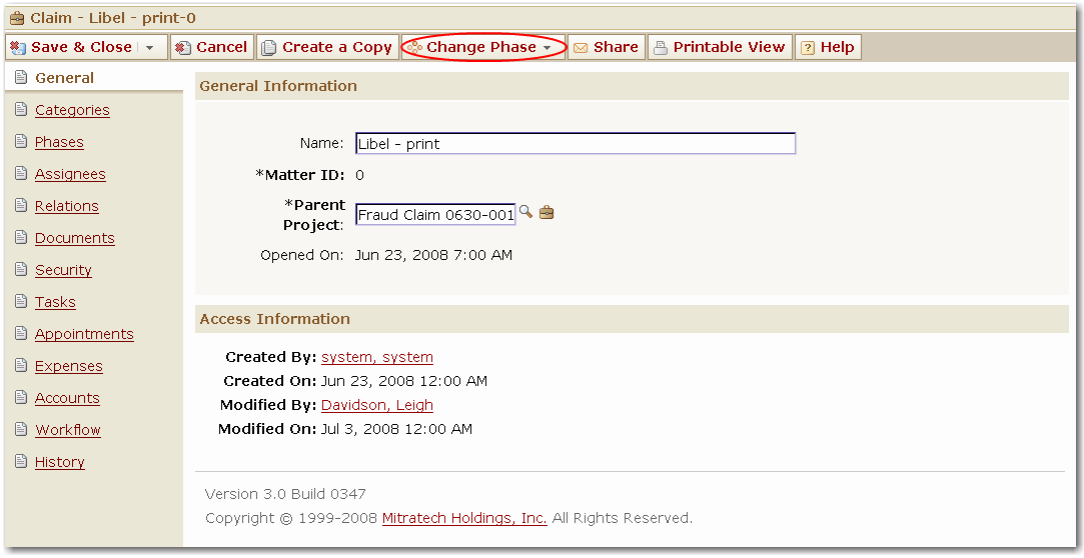
Each project goes through specific phases--from the creation of the project record to the end of the project. Together, these phases represent the project's life cycle. Each time you change the phase of a project, you move it along in the life cycle that is defined by your company policy.

For example, when you create a project, its initial phase may be Intake. As project tasks are completed, you select the phase that indicates that the current stage is completed and the project is moving to the next stage. As the project progresses, you continue to change the phase until the end of the project, which is usually the Closed phase.

You cannot skip a required phase or go back to a previous phase. For example, you cannot select **Re-open** after the **Open** phase is completed; the current phase must be **Closed** in order for you to select **Re-Open**.

To change the phase of a project

1. Search for a project and open it.
2. Click **Change Phase**, and then select a phase from the drop-down list.



Project Change Phase Button

Use the **Phases** page of a project to view the date on which the phase was set, the name of the phase, who changed the phase, and the length of time the project was in a phase.

1.4.6 Assigning Contacts to Projects

Assignees are TeamConnect users who also have contact records. Use the **Assignees** page to select and manage the people who are working on a project. You can assign one or more users to a project and each assignee can have a different role in the project, such as attorney or paralegal.

Typically, one active assignee is set as the main assignee and is in charge of the overall progress of the project. The rest of the assigned users are responsible for tasks, milestones, or assignments that move the project forward to completion.

You can perform the following tasks to manage assignees for a project:

- Viewing Users Assigned to a Project
- Adding Assignees to Projects
- Changing the Primary Assignee for a Project
- Unassigning or Reassigning Assignees
- Removing Assignees from a Project

1.4.6.1 Viewing Users Assigned to a Project

Use the **Assignees** page of a project record to view a list of the users who are currently assigned to the project and the assignment history if there are any changes.

To view users assigned to a project

1. Click the **All** link.

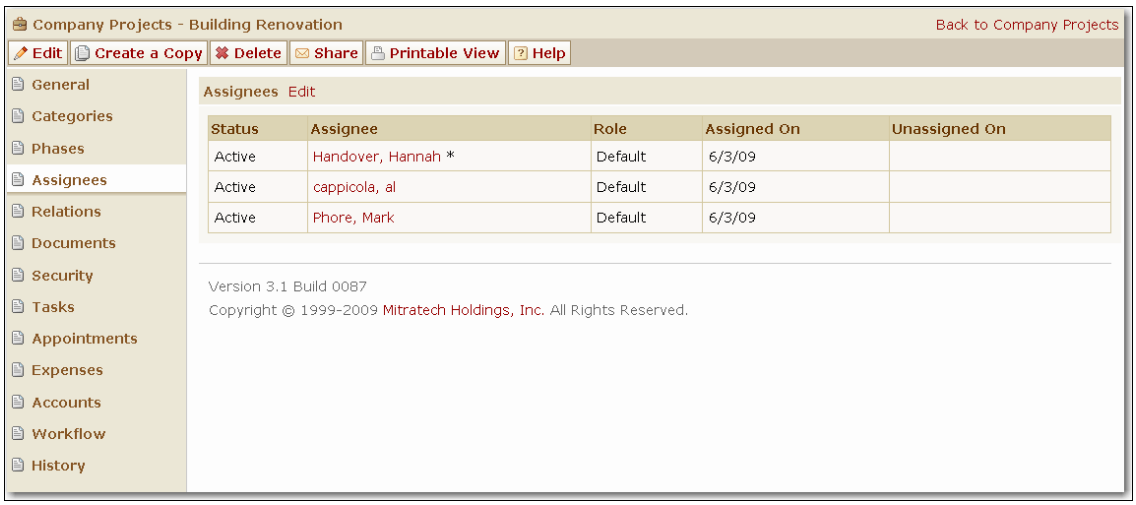
   You can access projects on the **All** tab, but your system administrator may have provided a customized way for you to access projects. Check with your system administrator for details.

2. Select a project.

3. On the **Project** list page, click the project whose assigned users you want to view.

4. In the left pane, click the **Assignees** link.

You can view the status, role, date of assignment, and the date on which the user was unassigned from the project, if it applies.



Projects View Assignees

1.4.6.2 Adding Assignees to Projects

Use the **Assignees** page to add assignees and their roles to a project. Roles are the responsibility that each assignee has for a project, such as attorney or accountant.

Projects may also have a project leader who is responsible for the progress of a project. Typically, the project leader is assigned the Primary designation.

To add a user to a project

1. Search for a project and open it.
2. In the left pane, click the **Assignees** link.
3. Click **Edit**.
4. Select one or both of the following options:
   - If there are no current assignees, select or search for the appropriate user name in the **Assignee** field.
   - To add an additional assignee, click **Add New Assignee**, and then select the appropriate user name in the **Assignee** field.
5. In the **Role** drop-down list, select the role that applies to the selected user.

   The same user can be assigned to a project several times if the user has a different role for each assignment.
6. If there is more than one user assigned to this project, in the **Primary** column, click the radio button to select a main assignee.
7. Select a save option.

If email notification is enabled, each of the users assigned to the project will receive an automatically generated message to inform them of their assignment. If you assign yourself to a project, you will not receive an email notification. You only receive email notifications if you are assigned to a project by someone else. See Setting Up Email Notifications.

Assignees Page Field Descriptions

The table below contains the default fields for the Assignees page. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Assignees Page Field Descriptions

Field or Control	Description
Action	Add or remove an assignee for this project. • Click + to add a new row • Click - to remove a user

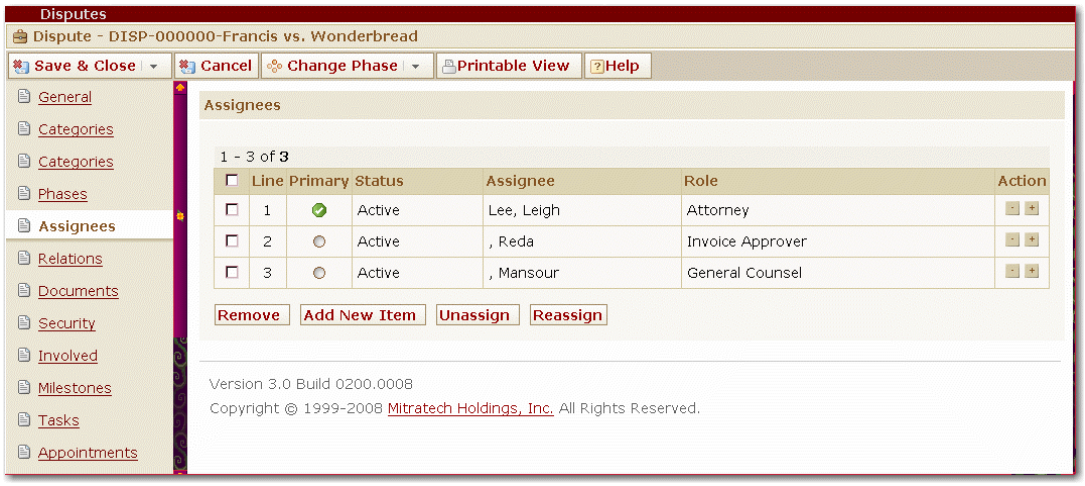
Add New Assignee button	Assign a user to this project.
Assignee	The name of the user that is assigned to this project.
Primary	The designated project leader. ***Note:*** *Only assignees with the Active Status may be set as the main assignee.*
Reassign button	Set the selected users status to **Active**.
Remove button	Permanently delete a user from this project.
Role	The duty of a user during this project, for example, Attorney or Accountant.
Status	The current status of each assignee in the list. Options are: • Active—Currently assigned to this project • Inactive—Not currently assigned to the project
Unassign button	Sets the selected users status to **Inactive**.

1.4.6.3 Changing the Primary Assignee for a Project

Use the **Assignee** page to assign or change the designated project leader. You can change the primary assignee at any time.

To change the primary assignee in a project

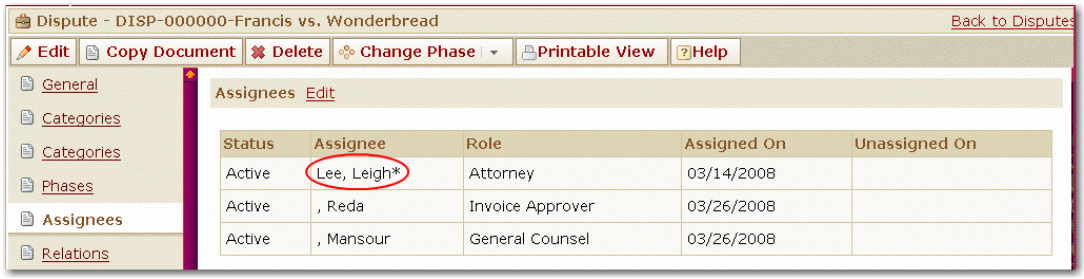
1. Search for a project and open it.
2. In the left pane, click the **Assignees** link.
3. In the **Primary** column, select the radio button for the user that you want to set as the main assignee.



Assignee Page

4. Select a save option.

On the **Assignees** list page for a project, the main assignee is indicated by an asterisk.



Projects Assignee Page

1.4.6.4 Unassigning or Reassigning Assignees

Use the **Assignees** page to temporarily remove a user from a project, or to reassign a user to a project. There are certain situations when you might need to end or temporarily end an assignee's participation in a project. For example, if the assignee's workload needs to be adjusted, you may give the assigned projects to a different user.

Unassigning assignees instead of deleting them is useful so that you have a record of the project assignment history.

To unassign or reassign users

1. Search for a project and open it.
2. In the left pane, click the **Assignees** link.
3. Select one of the following options:
   - To temporarily remove users from a project, select the appropriate check-boxes, and then click **Unassign**. The status changes to **Inactive**.

- To reassign users, select the appropriate check-boxes, and then click **Reassign**. The status changes to **Active**.

4. Select a save option.

1.4.6.5 Removing Assignees from a Project

Use the **Assignees** page to completely remove a user from a project.

To remove a user from a project

1. Search for a project and open it.
2. In the left pane, click the **Assignees** link.
3. Select the check-box next to the name of the assignees that you want to remove from the project. You can select more than one check-box.
4. Click **Remove**.

   The selected user is completely removed from the **Assignees** page, but not from TeamConnect.
5. Select a save option.

1.4.7 Creating Relationships between Projects

Use the **Relations** page to view or establish the relationships between projects, such as parent-to-child projects. A project may have several different relationships with other projects.

After you create a relationship between projects in one record, the related project's **Relations** page is automatically updated with the same information.

With the appropriate rights, you can view, edit, and delete relations for a project.

See Working with Related Records.

1.4.8 Managing Involved Parties for Projects

Use the **Involved** page to view, add, and edit the names of people or companies who are involved in a project. Involved parties are participants in a project, but are external to your organization and are not TeamConnect users. Involved parties may have roles such as witness, plaintiff, outside counsel, or opposing party.

Involved parties have a set of additional pages where you can add information. For example, for each involved party, you can set up an account, establish relationships between other involved parties, or manage documents that are related to an involved party. Even though these pages apply to an involved party, the procedures are the same as for any project in TeamConnect.

Involved party records can only be created and viewed from within their related projects.

You can perform the following tasks to manage involved parties for a project:

- Adding or Editing Involved Parties
- Changing an Involved Party Role
- Adding or Editing Involved Party Accounts

1.4.8.1 Adding or Editing Involved Parties

When you add an involved party to a record, a corresponding record is automatically created on the **Involvement** tab of the selected contact's record. See Viewing Contact Involvement for more information.

To add an involved party

1. Search for a project and open it.
2. In the left pane, click the **Involved** link.
3. In the **Involved Parties** section, click New.

   The involved party record opens to the **General** page.
4. In the **Contact** field, click the find icon , and then enter the appropriate search criteria.
5. Click **Search**.

   The **Contact Search** page opens with a list of contacts who match the search criteria that you selected.

   Tip: *If you cannot locate the appropriate contact, you can create it. Click* ***New****, select an option, and then follow the instructions to create a new contact. See Creating a Contact for more information. Once you save the new contact, you are returned to the project record and the new contact name appears in the* ***Contact*** *field.*
6. On the **Contact Search** page, click the name of the appropriate contact.

   You are returned to the **General** page and the selected contact name appears in the **Contact** field.

   Complete the additional fields. See Involved General page field descriptions for more information.
7. To activate this involved party, click the **Is Active** check-box.
8. Select a save option.

The new contact is added to the list of involved contacts for the selected project.

To edit an involved party

1. Search for a project and open it.
2. In the left pane, click the **Involved** link.

3. Click **View Involved Party Record** next to the appropriate contact.

   If you click the involved party's name, the contact record opens.

4. Click **Edit**, and then make the appropriate changes. See Involved General page field descriptions for more information.

5. If necessary, click a link in the left pane to enter or edit other involved party information, such as historical details, or relationships between projects.

6. Select a save option.

Involved General Page Field Descriptions

The table below contains the default fields for the involved **General** page. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Involved General Page Field Descriptions

Field or control	Description
Contact	The name of the contact that you want to add to this record. After the record is saved, the contact name is always displayed as a hyperlink to the contact's record.
Default Role	The role that a contact usually has in a project, for example, Attorney or General Counsel. The role that you select is automatically added to the list and set as the default on the **Roles** page when you save the record. You can add an involved party to the same project multiple times as long as each entry has a different role.
Is Active	The current status of the involved party. If checked, the involved party status is **Active**; if unchecked, the status is **Inactive**.
New	If available, clicking this button opens a drop-down list that lists all active wizards for this related object. Clicking a wizard on the list opens it.
Notes	Notes that may apply to this involved party.
Show Details For	Select the role from the list, the details of which you want to be displayed in this screen. This drop-down list is linked to the **Roles** tab and displays all roles added to the contact. If the **Default Role** has custom fields associated with it, they will be displayed below this drop-down list. If not, nothing will be displayed.

1.4.8.2 Changing the Status of an Involved Party

Use the involved **General** page to change the status of an involved party.

To change the status of an involved party

1. Search for a project and open it.
2. In the left pane, click the **Involved** link.
3. Click **View Involved Party Record** next to the appropriate contact.

   The involved party record opens to the **General** page.

   If you click the involved party's name, the contact record opens.
4. Click **Edit**.
5. In the **Is Active** field, clear the check-box if you want to inactivate an involved party; select the check-box if you want an involved party to become active.
6. Select a save option.

1.4.8.3 Changing an Involved Party Role

Use the **Categories** page to change an involved party's role in a project.

Typically, companies organize their involved party contacts by categories or roles. Depending on the organization practices, these categories may include subcategories. Contacts may be involved in a project in a number of roles such as respondent, claimant, witness, or outside counsel. One of the roles is always set as the default role for the selected contact.

With the appropriate rights, you can add, view and delete involved party roles.

To change the role of an involved party

1. Search for a project and open it.
2. In the left pane, click the **Involved** link.

   The involved party list view opens.
3. If necessary, in the **View** drop-down list, select an option to view specific records.
4. In the Involved Party column, click **View Involved Party Record** next to the name of the user whose role you want to change.

   The involved **General** page opens.
5. In the left pane, click the Roles link, and then click **Edit**.

   The **Categories** page opens. This is the page that you use to change involved party roles.
6. On the **Categories** page, select the role that applies to this contact for this project.

   The selected role is also added to the **Default Role** drop-down list on the Involved page.
7. Verify that the appropriate role is set as the default.

8. Select a save option.

For details on deleting involved roles, see Deleting Records.

1.4.8.4 Relating Involved Parties

Use the involved **Relations** page to define the relationships between contacts who are involved in the same project, such as plaintiff-to-defendant or attorney-to-client. An involved party may have several different relationships with other contacts and more than one relationship with the same contact.

After you create a relationship between contacts in one record, the related contact's **Relations** page is automatically updated with the same information. See Working with Related Records for more information.

1.4.8.5 Adding or Editing Involved Party Accounts

Use the involved Party **Accounts** page if you need to create separate accounts to track specific transactions by contacts involved in the project.

You can do this in any of the following ways:

- From within the project to which the involved party is related
- From within the involved record

The procedure for adding an involved party account is the same as it is when you are adding or editing an account in the Finance area.

To add or edit an existing account to an involved contact

1. Search for a project and open it.
2. In the left pane, click the **Involved** link.
3. Select the **View Involved Party Record** link next to the appropriate involved party.

   If you click the involved party's name, the contact record opens.
4. In the left pane, click the **Accounts** link.
5. Select one of the following options:
   - To add a new account, click **New**.
   - To edit an existing account, click its link in the **Name** column, edit the appropriate fields, and then click the **Back to Involved Party** link to return to the involved party record.
6. To continue, see Creating or Editing an Account.

The name of the account is automatically added to the list of the accounts in both the involved record and the selected project.

1.4.9 Managing Milestones

Use the **Milestone** page to view, create, and edit the steps or activities to complete when working on a project, such as claim investigation or a site survey. Each project may contain several milestones, and each milestone can have a number of tasks and appointments associated with it.

Milestones also have a set of additional pages where you can add additional information, such as a **Documents** page where you can add documents that relate to the milestone.

You can view, create, and edit Milestone records only after you open the associated project record.

Note: *You are only able to view and use milestones if you have upgraded from TeamConnect 2.x.*

You can perform the following tasks to manage milestones for a project:

- Viewing Milestones
- Creating or Editing Milestones

1.4.9.1 Viewing Milestones

Use the **Milestones** page to view the milestones created for a selected project. You can only view milestones after you open the associated project.

To view a milestone record in a project

1. Search for a project and open it.
2. In the left pane, click the **Milestones** link.

The Milestones list view opens.

You can also sort milestones columns in the list view. See Sorting Information.

1.4.9.2 Creating or Editing Milestones

To create or edit a milestone

1. Search for a project and open it.
2. In the left pane, click the **Milestone** link.
3. Select one of the following options:
   - To create a new milestone, click **New Milestone**.
   - To edit a milestone, click the edit icon next to the milestone record that you want to edit.

   The Milestone record opens to its **General** page.
4. On the **General** page, enter or edit the appropriate information. See Milestone General page field descriptions for field information.
5. Use the links in the left pane to add or edit information on additional milestone pages.

6. Select a save option.

Milestone General Page Field Descriptions

Field or control	Description
Subject	The name of the milestone.
Projected Date	Click the **Calendar** icon next to the field to select the desired **Projected** or **Extension** dates.
Extension	***Note:*** *If you do not click the* ***Dates Unknown*** *check-box, you must specify at least one date in each milestone record.*
Completion Date	***Note:*** *Once the project phase is reached, the* ***Completion Date*** *field is a*
Dates Unknown	Check this box if you do not have any date information to enter in the **Projected Date** or **Extension Date** fields.
Completed on phase change	Check this box if you want to automatically mark the milestone as complete when the project phase that is selected in the **Phase** drop-down box is reached. Once the project phase is reached, the **Completion Date** field is automatically is populated. Leave this check-box blank if you plan to set the milestone changes manually.
Transition	If the **Completed on phase change** check-box is selected, and a **Phase** is selected, select whether the milestone should be automatically marked as complete when transitioning to the selected phase or transitioning from it.
Phase **(drop-down list)**	If the **Completed on phase change** check-box is selected, select the appropriate project phase at which to automatically mark the milestone complete. This drop-down lists all phases defined for this project's milestones. ***Note:*** *This field does not change the phase of a project record; you are defining a condition under which this milestone is automatically marked as completed.* If you want to change the phase of a project, see Changing Project Phases.
Notes	Type any additional comments related to this milestone.

1.4.9.3 Setting Milestone Categories

Use the Milestone **Category** page to assign a milestone to a group that may describe the type of milestone or its function. Categories are usually pre-defined according to your company's needs.

The categories that you see apply to the specific TeamConnect area that you are viewing and your assigned rights.

See Setting Category Details for more information.

1.4.9.4 Managing Appointments for a Milestone

Use the Appointment page to schedule or edit appointments that are related to a milestone.

To add appointments to a milestone

1. Search for a project and open it.
2. In the left pane, click the **Milestone** link.

   The **Milestones** list view opens.
3. Open the appropriate milestone.
4. In the left pane, click the **Appointments** link.
5. To continue, go to step 4 in Creating or Editing an Appointment Manually.

For more information about appointments, see Appointments Calendar.

1.4.9.5 Managing Milestone Tasks

Use the Milestone **Tasks** page to manage tasks that are related to milestones. Each milestone may include one or more tasks that must be completed before the milestone is closed. You can view, create and delete all tasks related to a specific milestone.

To manage milestone tasks

1. Search for a project and open it.
2. In the left pane, click the **Milestone** link.

   The **Milestones** list view opens.
3. In the left pane, click the **Tasks** link.
4. To continue, see step 3 in Creating a Task Manually.

1.4.10 Adding Tasks to Projects

Use the Projects **Tasks** page to designate the users and assignments that are needed to complete a project or milestone. You can change task assignments at any time and also assign tasks to yourself.

The procedure for creating and editing project tasks is the same as it is when you are creating or editing a task using the **Calendar** area.

To create a task for a project

1. Search for a project and open it.
2. In the left pane, click the **Activities** link.
3. Click **New**.

   The task record screen opens to the **General** page, and the project automatically displays in the **Project** field.
4. To continue, see step 4 in Creating a Task Manually.

To edit a task from the **Activities** page, click the task and click **Edit**.

1.4.11 Adding Appointments to Projects

Use the **Appointments** page to schedule appointments and meetings that are related to a specific project.

When you create an appointment, the project record name is automatically displayed in the **Project** field of the appointment record.

The procedure for adding an appointment is the same as it is when you are adding an appointment using the **Calendar** area.

To create an appointment for a project

1. Search for a project and open it.
2. In the left pane, click the **Appointments** link.
3. Click **New**.

   The appointment record screen opens to the **General** page.
4. To continue, see Creating or Editing Appointments.

To edit a task from the **Activities** page, click the appointment and click **Edit**.

1.4.12 Adding Expenses to Projects

Use the **Expenses** page for a project to manage the cost of merchandise or services that are necessary to conduct your business.

You may associate several expense items to a project. All expenses fall into one of the following categories:

- Project expenses, such as the cost of sending an investigator to a location out-of-town, or the cost of dinner for the project team when they work late.

- Global expenses, such as the cost of office supplies, or the cost of hiring contractors to paint the corporate offices.

Once you create expenses, you can post them against the appropriate accounts and track expenses by project and vendor. See Expenses for more information.

The procedure for creating expenses is the same as it is when you are working with expenses in the Finance area.

To create an expense for a project

1. Search for a project and open it.
2. In the left pane, click the **Expenses** link.
3. To continue, see Creating or Editing an Expense.

1.4.13 Adding Accounts to Projects

Use the **Accounts** page to create or edit accounts for projects.

Money in an account is used for a specific purpose in your organization, such as a client escrow account or a petty cash account. Accounts can also have a parent-child relationship, such as a child account that is funded by the parent project account.

You can easily withdraw from and deposit funds to accounts, transfer funds between parent and child accounts, and post transactions to the appropriate accounts according to the specified posting criteria.

The procedure for creating accounts is the same as it is when you are working with accounts in the Finance area.

To create an account for a project

1. Search for a project and open it.
2. In the left pane, click the **Accounts** link.
3. To continue, see Creating or Editing an Account.

1.5 Reports

TeamConnect provides a native analytical reporting service that is used to design, save, and execute graphical reports. This service allows you to view reports in a tabular format similar to a spreadsheet or in graphical representation formats, such as a pie chart, bar chart, or line chart.

Since these are dynamic reports and are under the control of the TeamConnect rights managements services, report administrators who have the necessary rights are able to modify the properties and appearance of these reports at any time to improve their usability.

The following table shows how you can find, create, and run reports.

...Reports	How...
Finding	• Viewing Reports • Adding Reports to Dashboards and Portal Panes • Printing Records • Using Report Folders
Building	• Adding General Properties • Creating One or More Data Series • Specifying Chart Characteristics
Running	• Running Reports • Using the Scheduler to Schedule Run Time • Changing the Appearance of a Report • Running Drill-down Reports

Report-specific Pages

Each report has the following pages on which you can view and edit information:

- **General—**Contains the report name, type and description.
- **Data—**Lets you view or create data series to define the properties for a report.
- **Chart—**Lets you view or edit information about the properties of the chart, including the report type and details.
- **Security—**Lets you manage user rights to reports.
- **Schedule—**Lets you set up recurring, automatic runs of reports that are then emailed to a distribution list that you define.

1.5.1 Viewing Reports

You can view and manage reports using the **Reports** tab.

You can display a list of reports in the right pane as follows:

- By clicking a collection link in the left pane
- By clicking a report folder in the left pane

In the list view, you can sort reports by several default options.

Additionally, you can add graphic representations and tabular reports to a dashboard or home page. See Dashboards and Portal Panes for more information.

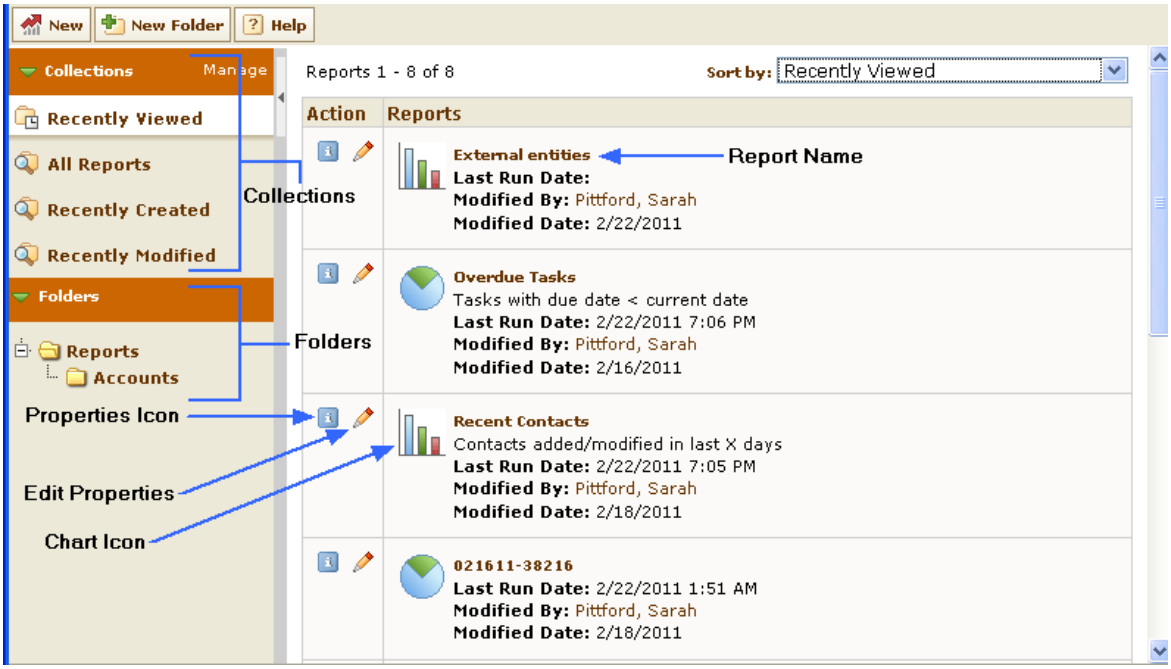
To view Reports

1. Click the **Reports** tab.

   The Reports main view opens to the **Recently Viewed** collection.

2. In the left pane, click the Collection or Folder that contains the report that you want to view. The appropriate reports appear in the right pane.

   If you do not see any reports listed in the right pane, click the **All Reports** collection link.



Reports List View

The Reports main view contains the following elements:

- **Collections**—Contains reports in the named groupings, such as **Recently Viewed** which contains the last 20 reports that you opened. See Viewing Collections of Records for more information.
- **Folders**—A view of the report folder hierarchy. See Using Report Folders for more information.
- **Chart icon**—Displays the type of chart type that is defined for this report. The chart type may be a graphic representation, such as a bar or line chart, or tabular which looks like a spreadsheet.
- **Report name**—The name of the report. You can click the report name to run a report. See Running Reports for more information.
- **Properties icon**—Opens the Properties page, which lets you view report information and do limited edits to report parameters.

  From the **Properties** page, you may also click the **Edit** link to edit the report's properties. See Building Reports for more information.

  You may click the **Delete** button to delete the report entirely.

If the report you want to delete is a "drill-down" report (is linked to other reports), a pop-up warning informs you of this condition and lists the names of the other reports. You may then choose whether to continue with the deletion. If you do continue, the drill-down report is deleted and the links between the drill-down report and the other reports are erased.

You may also run the report from the Properties page, by clicking the **Run Report** button in that view.

- **Edit properties icon**—Opens the report in edit mode. See Building Reports for more information.

Additionally, you can view when the report was last run, who last modified the report, and the date when it was modified.

Once you run a report, with the appropriate rights, you can make changes to its properties, change the way it appears, and then run it again. See Running Reports, and Changing the Appearance of a Report for more information.

Sorting Reports in the List View

By making a selection in the **Sort By** drop-down list, you can sort reports in the right pane in the following ways:

- **Recently Viewed**—Displays the reports in the **Recently Viewed** collection. This selection only appears if the **Recently Viewed** tab is clicked on the report list page.
- **Name A-Z**—View reports in ascending order.
- **Name Z-A**—View reports in descending order.
- **Last Run Date - Newest to Oldest**—View reports with the most recently run at the top of the list.
- **Last Run Date - Oldest to Newest**—View reports with the oldest date on top.

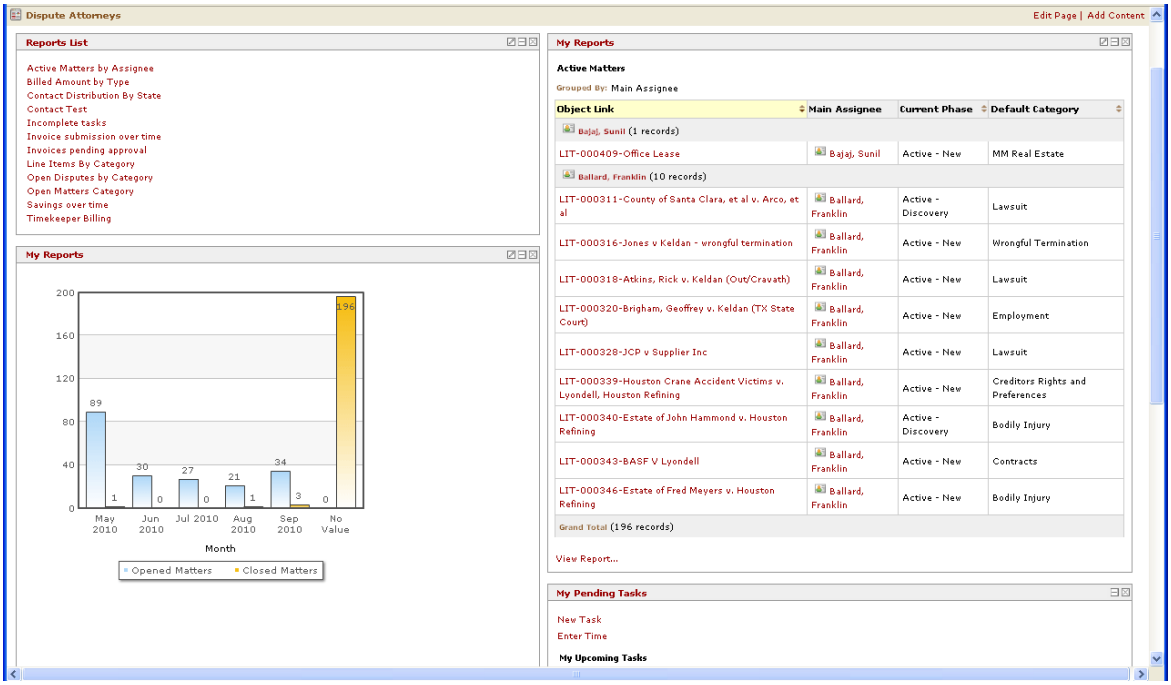
1.5.1.1 Dashboards and Portal Panes

The home page is the first page you see after you log in. Home pages contain specialized sections called portal panes. From portal panes, you can create and access various reports that are of importance to you. Dashboards provide a quick visual representation of the reports.

Reports List Portal Pane

TeamConnect has a standard portal pane for listing reports that contains a drop-down list of report folders. Choose a folder name from that drop-down to see links to the reports that are contained in the folder. Click on a link to execute the report.

Tip: *You can set a portal pane to remember a folder name by clicking the Edit icon in the pane's title bar, entering a folder name, and then clicking the* ***Save*** *button. In the future, each time the portal pane is displayed, that folder is automatically selected.*



Dashboard

Based on your user group and the home pages defined by your organization, your home page may already contain dashboard portal panes that display specific reports.

For information about dashboards and portal panes, see Home Pages and Portal Panes.

To add a report view to your homepage

From the Home Page screen, click the **Add Content** link on the right side of the navigation bar.

If this link is not visible, contact your TeamConnect administrator.

From the resulting drop-down menu, click **My Reports**.

After the block for My Reports has generated, click the edit icon ( ) within the block.

Select the desired report and chart dimensions.

Click Save to finalize the report view.

1.5.1.2 Using Report Folders

Use report folders to organize reports into useful groups. For example, you may want to group all financial reports into one folder, and all Dispute matter reports into another. When you select a folder in the left pane, its contents appear in the right pane. Folders can contain reports and sub-folders.

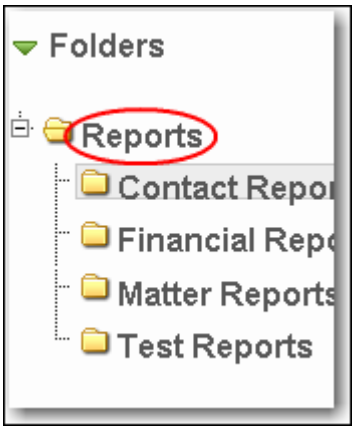
Folders may be public or private; a public folder can be changed by any user with the appropriate rights, and a private folder can only be changed by the user who created it.

You can create new folders and drag-and-drop reports from the right pane into folders in the left pane. You can also drag-and-drop a folder into a different folder so that it becomes a sub-folder.

Depending on your rights, you can delete any folder except the top-level Reports folder.

To create a new folder

1. Click the **Reports** tab.
2. Click the parent folder under which you want to create a new folder.



Top-Level Folder

3. In the main view, click the **New Folder** button.

   The folder's **General** page opens.

4. In the **Folder Name** field, enter a name.

   The **Folder Path** name is determined by the option you selected in step 2. If you selected the **Reports** folder name, this field shows **Reports**; if you selected an existing folder, this field shows the same information as the folder you selected.

5. (optional) Enter a **Unique Key** that identifies this folder and a **Description** of the contents of this folder.
6. Select a save option.

To move reports into folders

Note: *You must have appropriate rights to move reports and you can only move reports to which you have rights.*

1. Select the folder that contains the reports that you want to move.

   The contents of the folder appear in the right pane.

2. In the right pane, click the appropriate report, and then drag-and-drop it into the appropriate folder in the left pane.

Tip: *You can view all reports in the* ***All Reports*** *collection regardless of its current folder.*

To move a folder into a different folder

In the left pane, click and drag a folder into a different folder.

The selected folder, its sub-folders, and all of its Reports are moved.

To delete a report folder

1. Open the properties of the report folder that you want to delete.
2. Click the **Delete** button.

The folder and all of its contents are deleted if you have the appropriate rights.

If the folder that you want to delete contains reports to which you do not have access, only the reports that you have rights to are deleted. The folder is not deleted. You cannot delete Reports that are locked for editing.

If the folder that you want to delete contains "drill-down" reports (reports that are linked to other reports), a warning pop-up informs you of this condition and lists the names of the other reports. You may then choose whether to continue with the deletion. If you do continue, the drill-down reports are deleted and the links between the drill-down reports and the other reports are erased.

To set report folder security

1. Follow the steps associated with security for any TeamConnect record, as described in Editing Record Security.
2. The field **Folder Security** allows you to choose whether your security settings apply to this folder only, or to this folder and all subfolders (default value).

1.5.2 Running Reports

Running a report generates a report based on its defined data series and parameter information. Once you run the report, the data is used to create a graphic or tabular chart of this information. Each time that you change the appearance of a report, you can run it again to see the new results.

Before you can run a report, all of its properties and data series options must be defined by someone with appropriate rights. You can select the appearance of the report data at a later date if necessary. See Building Reports for more information.

Note: *This section discusses how to request an immediate run of a report. It is also possible to schedule a report to run automatically at predetermined intervals. For details on how to schedule a report, see Scheduler.*

To run a report

1. If necessary, click the **Reports** tab.
2. Select one of the following options:
   - In the Reports list view, in the right pane, click the report that you want to run.
   - Open the Collection or Folder that contains the appropriate report, and then click the report that you want to run.

If you have already run this report recently, you might see cached output instead of new output retrieved from a full report run. To learn more about cache, see Viewing a Cached Report. See Changing the Appearance of a Report if you want to make cosmetic changes to a report. This will not change the appearance of the original report.

To run a report with parameters

Note: *If there are no parameters associated with this report, it runs immediately and appears as a chart or tabular report based on its settings.*

If Parameters are defined (values that you enter before the report is run), the **Parameters** page opens. Review or change the parameter values, and then click **Run Report** to display the chart. See Building Reports for more information.

After a report with parameters runs, link **Clear Values** will erase any parameter values that had been entered previously. Link **Reset to Default** will erase any previous parameter values, then replace them with the default values that were defined when the report was built.

Neither of these two links will cause the report to run again. You must explicitly click the **Run Report** link to run the report again.

1.5.2.1 Running Drill-down Reports

Some reports are designed to use drill-down reports. If the report that you are running supports drill-down reports, you can launch the drill-down report by clicking on an element of the graphical chart output, such as:

- Column
- Bar
- Pie Slice
- Line

When you click on one of these elements, the drill-down report opens, and its chart output replaces the chart output that you had been viewing. (To return to the chart you had been viewing, click the link **Back to Report** Execution.)

The output of the drill-down report is restricted to those records that match the element you clicked on. For example, if you had been viewing a Column chart in which each column represented an invoice type, and you clicked on the column labeled "Accrual", the drill-down report output that appears would contain only Accrual invoices.

Note: *Drill-down reports are not supported on the Apple iPad.*

1.5.2.2 Viewing a Cached Report

When you run a report, the output is automatically cached (stored in the computer's memory). If you navigate away from the report to do other work in TeamConnect, then return to the report, the output is retrieved from the cache without re-running the report.

Note: *Reports are cached on your Home Page only.*

TeamConnect continues to use the cached output unless it encounters one of the following conditions. If any of these conditions are true, the report output will be produced from a new run, not from cache:

- The Data Warehouse has been refreshed since the last time you ran the report.
- The report properties have been edited and saved (by you, or another user) since the last time you ran the report.
- The report uses the Tabular Only chart type. Output for this chart type is not cached. All other chart types are cached.
- The report has parameters, and you are executing the report from within the Parameters page. In this case, cache will not be used. (A report with parameters that is executed by simply clicking its name in the report list page will still use cache.)
- You run out of cache memory on your computer. If you cache a large number of reports and the cache uses all the memory reserved for it, the cache will remove the oldest cached report output in order to make room for new, incoming report output. The older reports will no longer be available in cache.
- The report is re-run by clicking on a report in the list view, or by clicking the **Run Report** button.

It is possible to change the appearance of report output using the chart bar, as described in Changing the Appearance of a Report. But such changes do not affect the stored output in cache. Only changes to the report properties themselves would affect cache - property changes would force a new, full run of the report.

1.5.2.3 Changing the Appearance of a Report

You can edit the way your report output appears. The options that are available are based on the type of chart that you are viewing and your assigned rights.

Note: *Changes in chart view are temporary and do not alter the original view of this chart. You can export changes, but to make permanent changes, you must have rights to edit chart properties.*

Note: *Most of the features discussed in this section are not supported on the Apple iPad, since Adobe Flash is not available on the iPad. The alternative chart output on the iPad may differ from Flash output in background color, bar colors, pie colors, column colors, area colors, line colors and y-axis value.*

To change the appearance of a Report

1. View the chart that you want to change.
2. In the chart bar, make the appropriate changes. See the Chart View field descriptions table for specific chart bar option information.

The changes are immediately reflected in the chart view.

Chart Bar

The table below contains the available options for the different types of reports.

Chart View Field Descriptions

Field	Options
Type	The type of chart in which you want to view the report data. Options: • **Bar** • **Column** • **Pie** • **Line** • **Area** For specific information about chart types, see Types of Report Formats.
Sub-type	The way the information appears graphically. The available options are based on the chart you select in the **Type** list as follows: • **Bar and Column charts—**Stacked, Clustered, Stacked 3D, or Clustered 3D

	• **Pie chart—**2D or 3D • **Area chart—**Stacked or Not Stacked • **Line chart—**With Marker or Without Marker
Legend	Location of the chart legend. Options: • **Bottom** • **Right** • **None**
X-Axis	Location and orientation of the X-Axis label. Applies to Bar, Column, Line, and Area charts only. Options: • **None—**No axis labels are displayed. • **Wrap—**Displays text horizontally. This is the default. • **Rotate—**Displays text vertically. • **Slant—**Displays test at a 45-degree angle. • **Stagger—**Displays text in an alternating pattern; one above, one below. **Wrap** and **Stagger** are not supported on the Apple iPad, since Adobe Flash is not available on the iPad.
Labels	Display or hide the values on the chart. Options: • **Show** • **Hide**
Results	How many results to show on the chart. Options: • **All—**Show all available results. • **Top—**Sort the results in descending order (highest to lowest) based on the first data series, then display the first X results based on the number selected in the spinner box. • **Bottom—**Sort the results in ascending order (lowest to highest) based on the first data series, then display the first X results based on the number selected in the spinner box.

1.5.2.3.1 Types of Report Formats

You can view report data as a graphic representation, such as a pie chart, or a tabular format which lets you view information as a spreadsheet. You can switch between these views at any time.

When using graphical charts, it is recommended that you match the type of data to the appropriate type of chart. For example, if you want to show trends over a period of time, it is best to use a line chart instead of a pie chart because a pie chart is designed to display information for a specific moment in time.

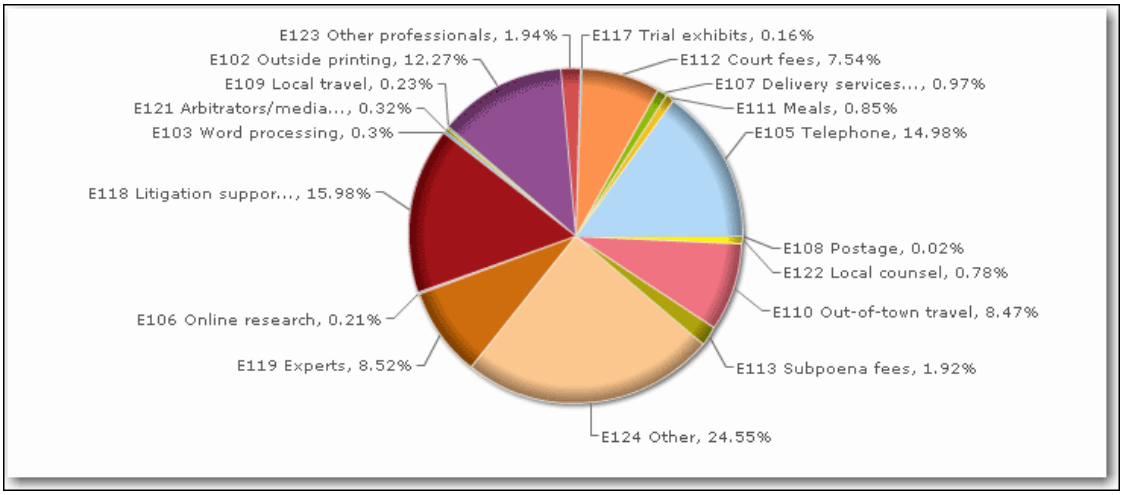
Graphic Charts

There are several types of default graphic reports as follows:

- Column
- Bar
- Pie
- Line
- Area

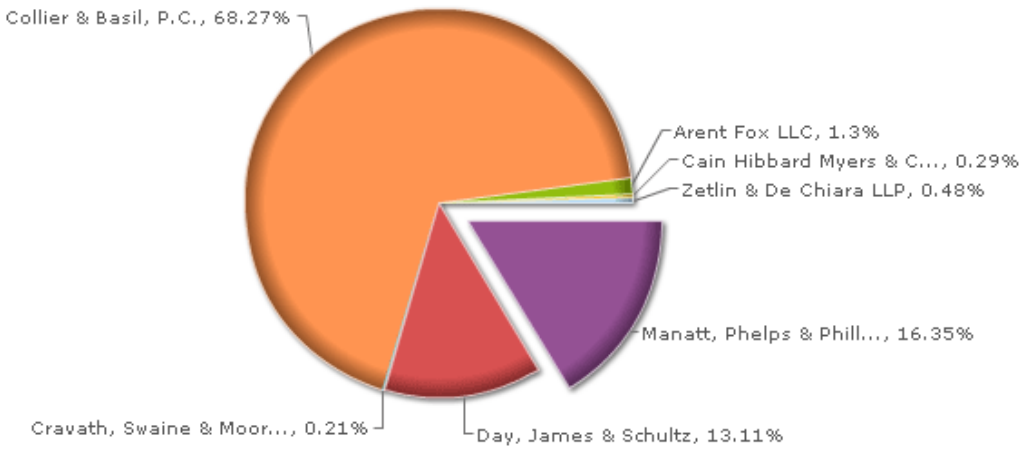
Once report data is open as a graphic chart, with the appropriate rights, you can make changes to the way the chart looks and export the graphic to a .pdf file. See Changing the Appearance of a Report for more information.

- **Pie Chart—**Displays information in a circular format with specific data represented as slices of the overall pie. Best used to display information for a specific point in time.



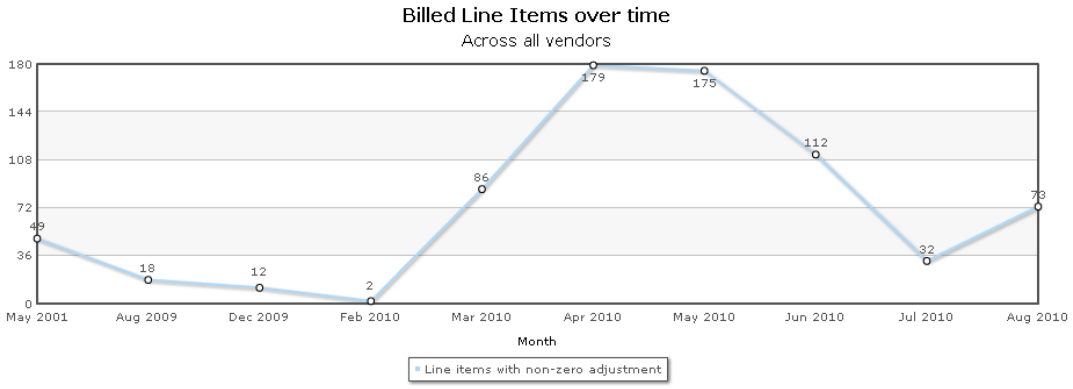
Pie Chart

Tip: *When working with pie charts, single click on a slice of the pie to separate it from the rest of the pie. Single-click again to move it back to the pie.*



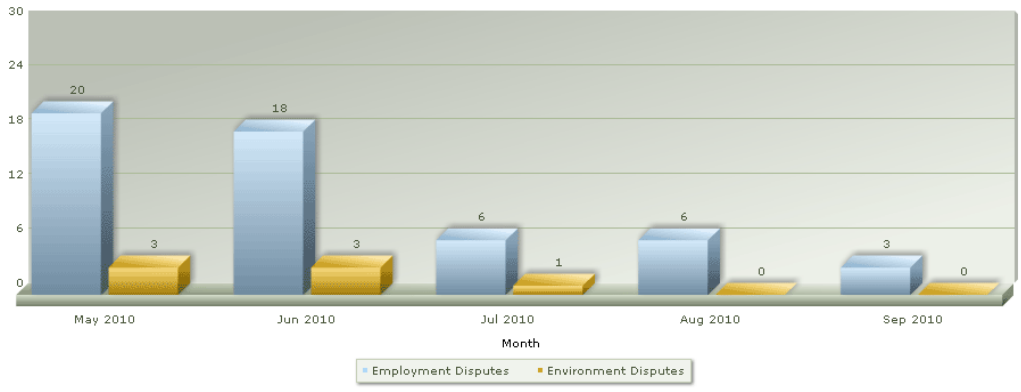
Separating a Slice of Pie

- **Line Chart—**Display information as points connected by a line. Best used to show trends in data over a period of time.



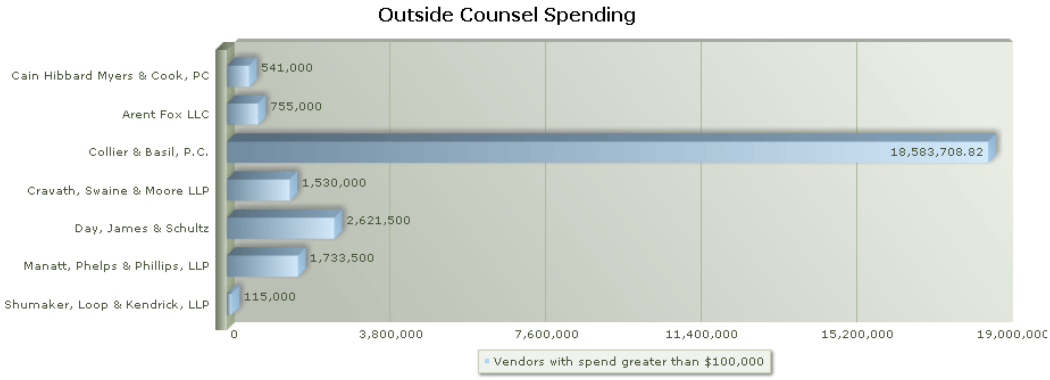
Line Chart

- **Bar chart—**Displays information in horizontal bars. Best used to display a small amount of information over time and under different conditions.



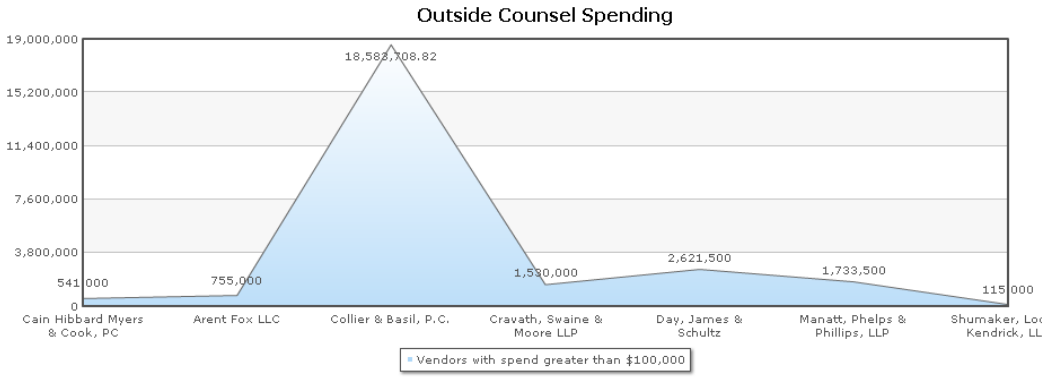
Bar Chart

- **Column chart—**Displays information in vertical bars. Best used to display a small amount of information over time and under different conditions.



3D Column Chart

- **Area chart—**Displays information in a filled area display. Best used for cumulative totals over time.



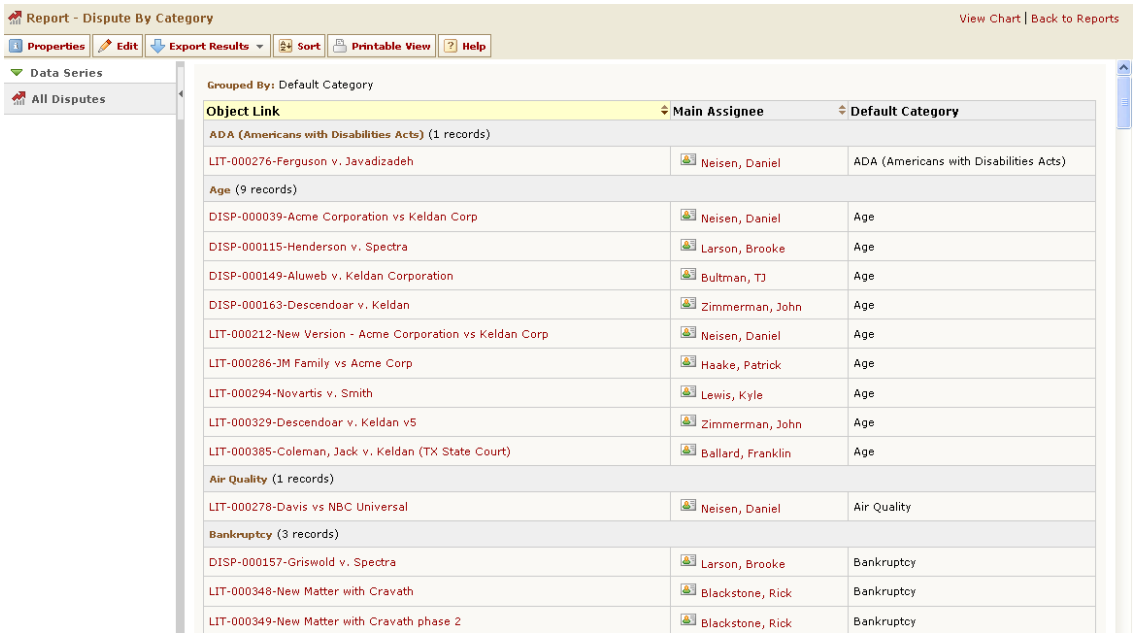
Area Chart

Tabular Chart

Tabular chart data is displayed in a spreadsheet format. You can sort the information in ascending or descending order by clicking the column header. (Data which spans columns does not have a column header, thus cannot be used for sorting.) You can export tabular data to Excel or to a .pdf format.

To access a Tabular chart

If a chart is defined as a **Tabular** only, it will open in **Tabular View** by default.



Tabular View

If you are in chart view, click the **View Results** link to present the chart in a tabular spreadsheet format. This link is in the upper right corner of the screen.

1.5.2.4 Exporting Reports

You can export a graphic chart to a .pdf format, and a tabular chart to both Excel and a .pdf format.

Note: *To export to the .pdf format, you need at least Acrobat Reader version 9.4.0.*

To export Reports

Run the report that you want to export. See Running Reports for more information.

- **For a Graphic chart—**Click **Export Chart**. The chart is saved and opened as a .pdf.
- **For a Tabular chart—**Click the **Export Results** drop-down list, and then select **Export as Excel** or **Export as PDF**. The data is saved or opened based on the action you select.

1.5.3 Building Reports

To build a report, you name the report, specify its properties, then save your work to one of the report folders. Once a report has been built, it is managed and executed as described in Viewing Reports and Running Reports.

To edit an existing report, click the **Edit** button while viewing the report specification.

To build a new report, click the **New** button while viewing a listing of existing report specifications. The new report, when completed, will be saved by default in the folder which you had been viewing.

Whether building a new report or editing an existing report, you must edit the report's properties. There are five kinds of property pages. The General Properties, Data Series, and Chart pages have some properties that are mandatory. The report specification cannot be saved until at least those properties have values. Refer to the following topics:

- General Properties
- Data Series
- Chart
- Security
- Scheduler

1.5.3.1 General Properties

The **General** page allows you to view or edit general properties of a report specification. It appears by default when a new report specification is started, or when an existing report specification is clicked. You can also return to this page by clicking the **General** tab in the left pane of the report specification page.

The table below contains the general properties of a report specification. Field descriptions are listed in display order.

General Properties Field Descriptions

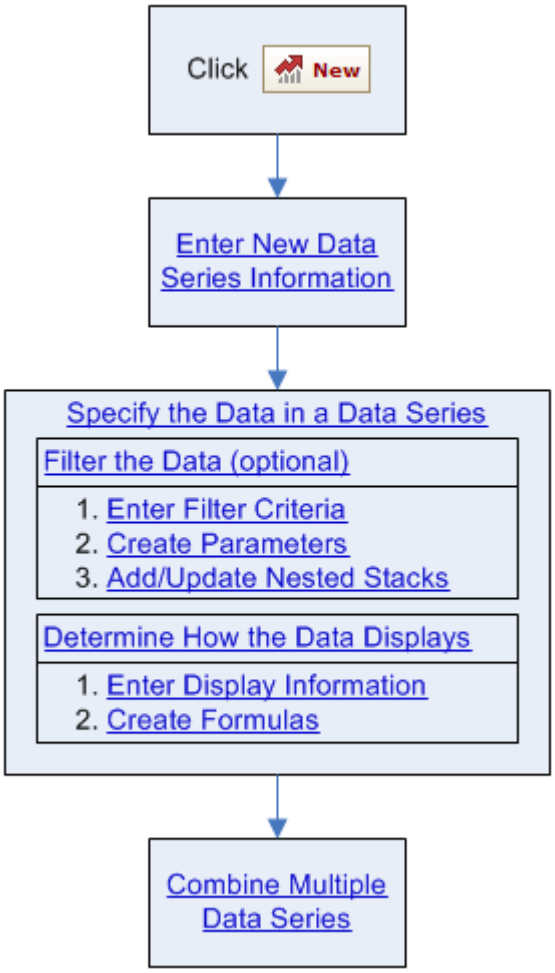
Field (* = required)	Description
***Report Name**	Your name for this report specification. Each specification in a report folder must have a unique name within that folder. Maximum length: 250 characters.
Unique Key	This text string is used for localizing reports - translating the report prompts to other languages. If your organization does not do localization, you should leave this field empty. If you plan to do localization, enter a string that is unique (a string that is not found in the Unique Key of any other reports.) Use only characters A-Z, a-z, and 0-9. Maximum length is 50 characters. This field is only editable if it is empty. Once you have supplied a text value to this field, it cannot be changed. For more information about localization, see Localizing Reports.
Folder Path	Describes where the report is found in the hierarchy of report folders. This is a read-only link. Clicking the link takes you out of the report edit page to the list page of that folder.
Description	Text describing the purpose of this report. Optional. Maximum length: 4000 characters.

When creating a new report, after you save your **General** values, the **Data** tab in the left pane is enabled. Click **Data** to begin creating one or more data series for the report.

1.5.3.2 Data Series

A data series is a group of data based on filtered criteria and fields you want to appear in the results. A report contains one or more data series. When you have more than one data series, you can combine them if necessary.

The following flowchart illustrates how to create a data series. Click areas of this flowchart for more information.



The **Data** page of the report displays a row for each existing data series, plus a block with parameter information. A parameter is a value for the report that you enter into a prompt when the report runs. When you create a new report, this page is disabled until you specify the properties under the **General** tab and save. When the report specification is in **Edit** mode, the **Data** page allows you to edit and create data series.

You can delete an existing data series or parameter by selecting the check-box next to the row and clicking **Remove**.

Each row of a data series includes the following fields:

Data Series List Field Descriptions

Field	Description
Order	A number that controls the sequence of appearance for each data series that appears in the report output. If multiple data series have the same value, they appear in alphabetic sequence of **Name**.
Name	The name of the data series in the report output. Click the name to specify data for the data series, as described in Specifying Data for a Data Series. This field is not editable.
Unique Key	A text string used to localize reports and translate the report prompts and labels. If your organization does not localize, leave this field empty. If you plan to localize, enter a string that is not used as the **Unique Key** of any other data series in the report. Use only characters A-Z, a-z, and 0-9. The maximum length is 50 characters. This field is only editable if it is empty. Once you enter a text value for this field, you cannot change it. For more information about localization, see Localizing Reports.
Record Type	The types of records where fields in this data series originate. This field is not editable.
Create a Copy	Creates a new data series with the same information. After you create a copy, click the text next to the **Name** field in the **Properties** section to update it with a better description of the data series.

Parameter Field Descriptions

Field	Description
Order	A number that controls the sequence that the report prompts parameters at runtime. If multiple parameters have the same value, they appear in alphabetic sequence of **Name**.
Name	The name of the parameter. This name is not visible in the report output at runtime, solution developers may use it to embed the report in a custom page or portal pane. The name also appears in i18n keys for localizing reports. This field is not editable.
Field Type	The datatype of the parameter.

Operator	The numeric operator that tests the report data against the parameter value. This field is not editable.
Default Value	A value that the end user sees at runtime when prompted to enter parameter values.

Note: *You cannot create new parameters using the* ***Parameters*** *block, only while defining filter criteria, as described in Filtering the Data.*

1.5.3.2.1 Entering New Data Series Information

After you click **New**, the **New Data Series** popup appears so that you can enter general information about a data series.

To enter new data series information

1. From the **New Data Series** popup, select a **Record Type**. The record type determines which types of fields the data series uses to create the report.
2. You cannot change the record type after you click **Ok**.
3. Enter a descriptive **Name** for the data series.
4. If you localize TeamConnect, enter a **Unique Key**.
5. (Optional) Enter a number in the **Order** field. If multiple data series have the same value in **Order**, they appear in alphabetic sequence of **Name** in the report output.
6. Click **Ok** to continue.

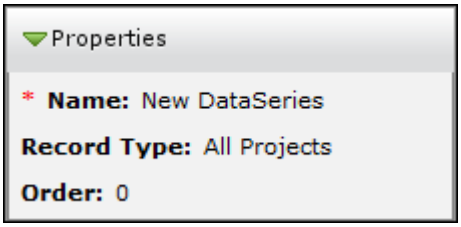
After you click **Ok**, you can edit the **Name** and **Order** of the data series.

To edit the properties of a data series

1. From an open data series, click **Edit Properties**.

Clicking Edit Properties to Edit Data Series Properties

2. Under **Properties** in the left pane, click the text next to **Name** and **Order** to edit the current text.

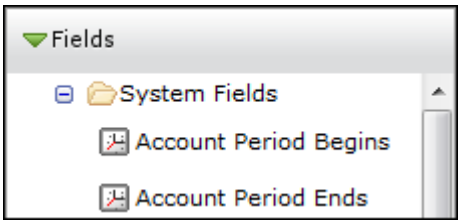


Editing the Properties of a Data Series

Note: *You can also edit* ***Unique Key****, in addition to* ***Name*** *and* ***Order****, on the* ***Data*** *page of the report. See Data Series List Field Descriptions for more information.*

1.5.3.2.2 Specifying Data for a Data Series

You specify data for each data series on the **Filter Criteria** and **Results Display** tabs. For both tabs, the Fields list in the left pane lists all fields for the chosen record type.



Fields List

Under the **Filter Criteria** tab, the **Fields** list includes all the fields that you can use to filter the data for a report so that only data that meets the filter criteria appears.

Under the **Results Display** tab, the **Fields** list includes fields that appear in the results.

Object Link	Project	Total Used
Allocated - All Matters		242,000,000.00
Allocated - DISP-000000	DISP-000000-Young vs. Williamson County	300,000.00
Allocated - DISP-000001	DISP-000001-Kramer vs. Kramer	300,000.00
Allocated - DISP-000002	DISP-000002-Thor vs. Loki	300,000.00
Allocated - DISP-000003	DISP-000003-Man vs. Himself	300,000.00
Allocated - DISP-000004	DISP-000004-New Yorker vs. Subway	300,000.00

Report with Fields (Object Link, Project, and Total Used) Chosen from the Results Display Tab

Selecting Fields

Drag a field from the **Fields** list to the work area under the tabs. Make sure a dotted outline appears for the field to stay.

Delete a field by clicking the ✖ icon to the right of its name.

Types of Field Folders

The fields are organized hierarchically within sections.

- System Fields

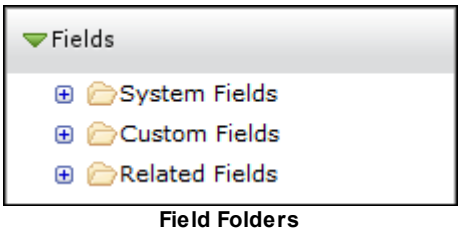
  Standard fields that come with TeamConnect before any customizing is done.

- Custom Fields

  Fields the solution developers in your organization add as they customize the TeamConnect design. In some cases, such as Legal Matter Management, custom fields are part of a pre-packaged design that is added to the standard TeamConnect design. Because custom fields are always associated with categories, this section is organized by category. Custom fields from the root category appear first. Expanding a category folder reveals the custom fields that belong to that category.

- Related Fields

  Fields that pertain to the record type of the data series but that are not in the actual record type itself. For example, fields from Involved records appear here, as do fields from any child objects or embedded objects that relate to the data series record type. A folder represents each related record type. Expanding that folder reveals the fields that belong to the related record type.



Field Folders

Field Specifics

In each folder, you might have the following types of fields:

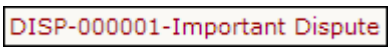
- **Folders**—A ⊞ icon next to a field indicates additional levels of hierarchy. Click this icon to show additional fields at the next deeper level. For example, fields representing users, such as **Created by** and **Modified by** fields, include that icon. Click this icon to reveal the Contact fields associated with the user.

  Caution: *Using fields from the deepest levels (more than three levels) may cause extensive database access that makes the report run slowly. Use good judgment in such cases, and talk to a solution developer if you have concerns that multi-level fields are causing slow report times.*

- **Parent Project**—If the record type for this data series is a child or an embedded object, you see a icon named **Parent Project**. Expand the icon to see the fields that pertain to the parent record.

  For certain record types, the field has a different name from **Parent Project**. For example, if the record type is **Line Item** or **Non US Tax**, the parent folder is named **Line Item Invoice** or **Invoice** (respectively).

- **Object Link** (Results Display)—Using this field places a highlighted link with the name of the record in the results display at runtime. When clicked, the link opens the view page for the record. An Object Link is available in the field list of every record type.



Object Link that Refers to a Dispute

- **Formula** (Results Display)—A number field you can edit. When you drag a **Formula** field into the work area of the **Results Display**, you can create a formula.

1.5.3.2.2.1 Filtering the Data

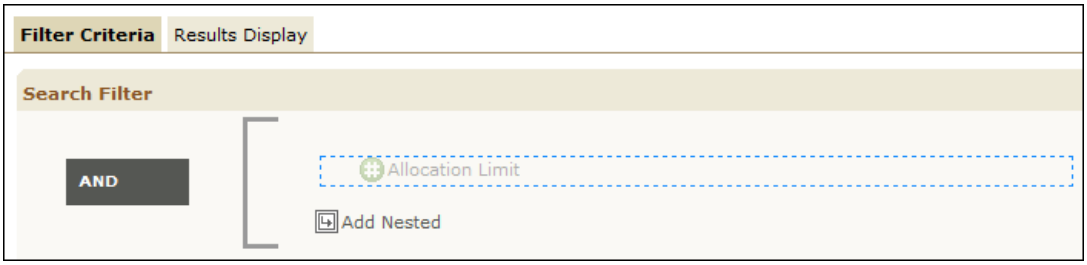
You filter the data by adding filter criteria so that only the data that meets the criteria appears in a report. To specify how data filters, use the **Filter Criteria** tab.

The visual layout of the **Filter Criteria** tab resembles a logic diagram, and you may find it helpful to have a logic diagram for your filters sketched out before you begin using this tab.

This tab enables the entry of a large, complex hierarchy of criteria, with mixed **AND** and **OR** specifications. You may also enter as few as one criterion if your filter needs are simple, or no filter criteria at all.

To enter filter criteria for a field

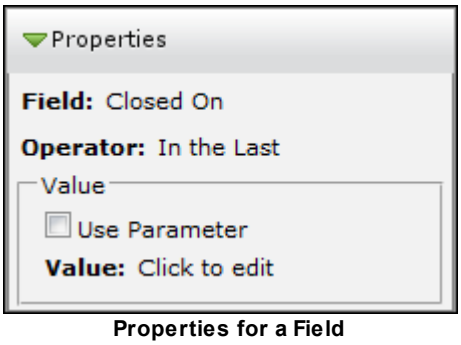
1. Drag a field from the Fields list to the dotted outline that appears.



Dragging a Field to the Dotten Outline

The newly dropped field appears with a default operator that you use to specify the criteria. For example, a date field appears with the operator **In the Last**.

2. Click the icon to the right of the field to edit the **Properties** of the field.

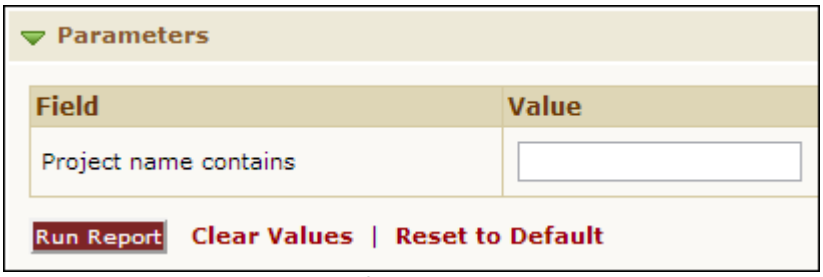


Properties for a Field

3. Click the text next to **Operator** to select from a list of operators.
4. If the type of operator selected requires a value, specify a value for the operator in the **Value** section. You can enter one of the following types of values:
   - A literal value—Depending on the field, a list of values or Click to edit text appears. Use the list or text field to enter a value for the operator.

     For example, for a date field with the **In the Last** operator, you could type 10, which would mean that you are filtering on dates that occurred within the most recent 10 days.

     For a date field with the **Between** operator, if you want a report of all invoices dated after 1/1/2011, enter 1/1/2011 for the first value (the start date), and leave the second value (the end date) empty.
   - A parameter—Select the **Use Parameter** check-box to indicate that the report should ask the user for a value at runtime. After checking this box, you may select an existing parameter from the adjacent drop-down list. To create a parameter, see the next section.

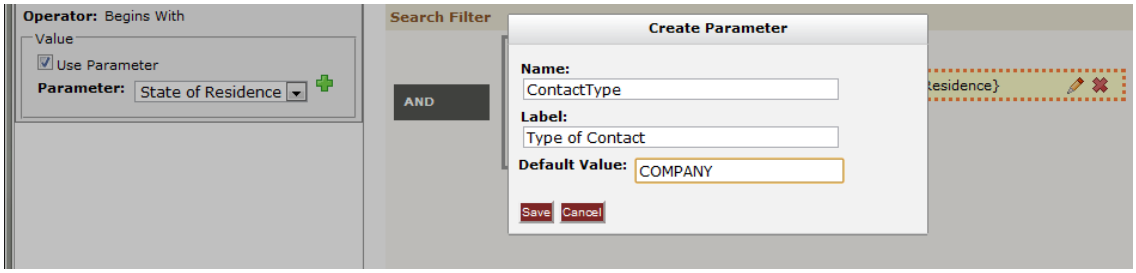


The Report Requires a Value Before Running When You Use a Parameter

To create a parameter

1. After you have placed a check-mark in the **Use Parameter** check-box, click the icon.
2. Enter a **Name** for the parameter. The name is an internal attribute that solution developers use to embed the report in a custom page or portal pane. Use a name that describes the purpose of the parameter. Each parameter name within a report must be unique.
3. Enter a **Label** for the parameter. The label is text that prompts the end user when they run the report.
4. (Optional) Enter a **Default Value** that the user sees when prompted to enter a parameter value.

Note: *After you have applied your edits and closed this page, all parameters appear in the* ***Data*** *tab. At that point you can edit their* ***Order*** *property, which determines the order in which parameters appear to the end user at runtime. If you don't change the* ***Order*** *property of parameters, they appear to the end user at runtime in alphabetic sequence of the parameter labels.*



Using the Parameter Check-box and Plus Icon with a Criterion's Value

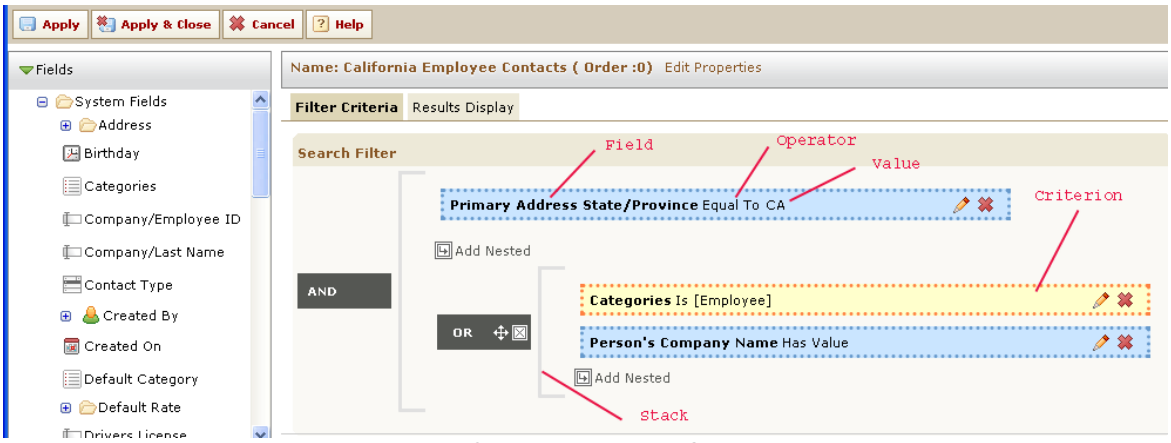
To create a parameter for Document record types

If you are reporting on fields related to a Document record, your report might include data for more than one version of the document. To prevent multiple versions from appearing in a report, choose the following values for each field:

- **Field—Document Type**
- **Operator—Is**
- **Value—Document**

Nested Stacks

The **Filter Criteria** tab includes one or more stacks, which are visual representations of a set of criteria. A nested stack uses the same rules and properties as the previous stack. Each stack includes at least two filter criteria or a field criterion and a nested stack, one level lower in the hierarchy. The following image includes an example of both.



Filter Criteria and Nested Stacks

To change a relationship for a stack

The default relationship between filter criteria in a stack is **AND**. To change the relationship to **OR**, click the word **AND** for **OR** to appear. Click the word **OR** to change the relationship to **AND**.

Clicking AND Changes It to OR

Adding more criteria to an **AND** stack usually reduces the number of records in the report. Adding more criteria to an **OR** stack usually increases the number of records in the report.

Note: *A very complex hierarchy of filter criteria, particularly nested OR criteria, may create complex database queries that run relatively slowly. If you suspect that your filter criteria may cause slow performance, ask a solution developer for advice about the best way to structure the criteria.*

To create a nested stack

Click Add Nested in the current stack. A new stack appears, nested one level deeper than the current stack.

To rearrange the hierarchy of stacks

You can move a filter criterion from one stack to another, and move stacks to different parts of the hierarchy. All stacks except the top-level stack display the icon. Click the icon to drag and drop an entire stack elsewhere in the hierarchy. If the stack has any children, those also move.

To delete a nested stack

Each stack except the top level contains the icon. Click the icon to receive a confirmation prompt regarding the deletion of the stack. Click **OK** to delete the stack and any children of the stack in the hierarchy.

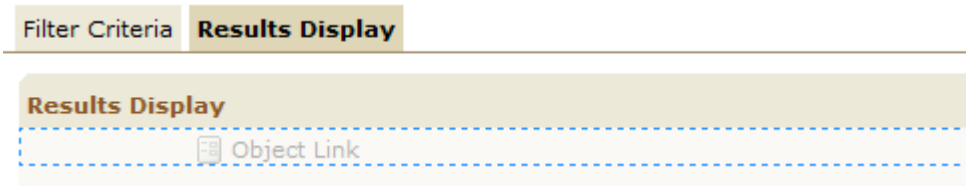
1.5.3.2.2.2 Determining the Data that Displays

On the **Results Display** tab, you choose and arrange the data fields and formulas that appear in the report output.

Note: *In the **Chart** tab, you will have the opportunity to display group statistics (record count, numeric field totals and averages, etc.). Fields used for grouping must also be present in the **Results Display**.*

To enter results display information for a field

1. Drag a field from the **Fields** list to the dotted outline that appears.



Dragging a Field to the Dotted Outline

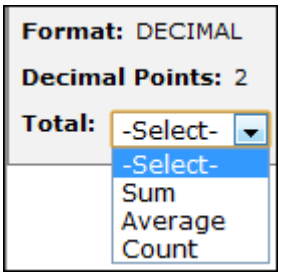
2. Click the icon to the right of the field to change the **Properties** of the field.
3. (Optional) Click the **Click to edit** text next to the **Label** field to determine the heading for the field in the report's output. If you leave the **Label** property empty, the default label associated with the field appears. All field labels within a data series must be unique.
4. (Optional) Click the **Click to edit** text next to the **Unique Key** field to enter a string used to localize column headings and translate the label to other languages. If you are using the default label, leave this property empty. If you overrode the default label by entering a value into **Label**, you should enter a **Unique Key** so that your overridden label can localize. Enter a string that is not used as the **Unique Key** of any other result fields in this data series. Use only characters A-Z, a-z, and 0-9. Maximum length is 50 characters.

   This property is only editable if it is empty. Once you enter a text value for this field, you cannot change it.

   For more information about localization, see Localizing Reports.
5. (Optional) Change the **Format** of numeric and date fields. The **Format** of most other fields is not editable.

   Numeric fields include the following format options under **Properties**:

   - **Decimal Points**—Select the number of digits that you would like to appear to the right of the decimal point.
   - **Total**—Select how the summary information for this field calculates the numbers in the column: **Sum**, **Average**, or **Count**.



Format Properties for Numeric Data Types

6. (Optional) Place a check-mark in the **Span Columns** check-box to make the field appear on a line of its own in the report. When this check-box is not checked, the field occupies a column in the report, with a heading at the top of the column. **Span Columns** is not available for numeric fields.

   In a report, spanned fields appear below the non-spanned fields, and each of their values occupy a full row in the report, spanning all columns. If there are multiple spanned fields, the

leftmost spanned field in the **Results Display** tab appears first, followed by the spanned field to its right, and so forth.

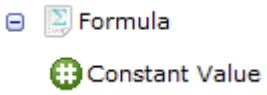
Object Link	Total Used
Allocated - All Matters	242,000,000.00
Created On: 12/14/12	
Allocated - DISP-000000	300,000.00
Created On: 12/14/12	

Report with Span Columns for the Created On Field

To create formulas

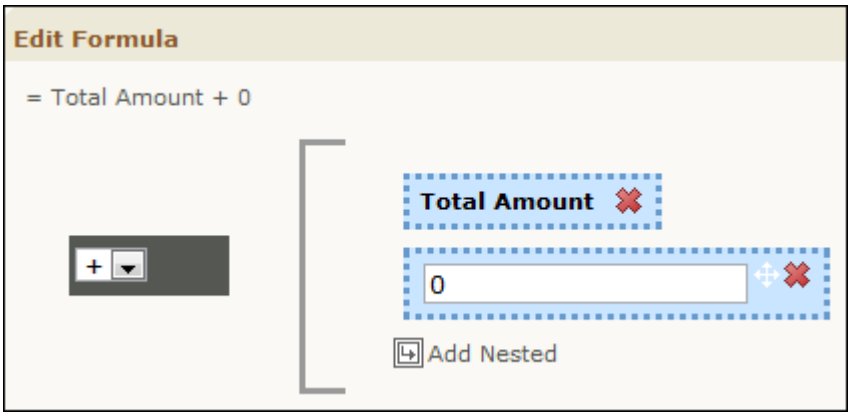
1. Drag the **Formula** field to the dotted outline that appears.
2. Next to the **Formula** field, click the **Edit** icon. The **Edit Formula** pane appears below the **Results Display** work area with the **Properties** of the formula visible in the left pane.
3. Drag at least two fields with a numeric data type to the dotted outlines in the **Edit Formula** pane.

   To enter a constant value for one of the fields, drag the **Constant Value** field. You may type up to 11 digits to the left of the decimal point and 6 digits to the right.



Constant Value Under the Formula Field

   The formula expression displays as text just above the graphical layout of the operands and operators, and the text updates as you work in the graphical layout and properties pane.



Edit Formula Work Area

4. Choose an operator that indicates how the fields relate to each other. From the drop-down list, choose the plus, minus, multiply, or divide symbol as an operator.

That operator is applied to all the operands found at that level, and the left-to-right order of operations used in algebra is also used in formulas. For example, if a nested level has operands named Budget, Fee, and Expense, and the operator is a minus sign, the portion of the formula expression would be (**Budget** - **Fee**) - **Expense**.

The same principles of nesting that applied to Filter Criteria are used in the **Edit Formula** work area. Each level of nesting implies a set of parentheses in the final formula expression. See Nested Stacks for more information.

5. Under **Properties**, enter any additional information as you would for any other numeric field. See To enter results display information for a field for more information.

1.5.3.2.3 Combining Multiple Data Series Using Cross-Object Reporting

After you create multiple data series for different objects, you can combine and display the data in a single report using cross-object reporting.

Note: *Before you complete the following steps, save the report after you have created all data series.*

To combine multiple data series

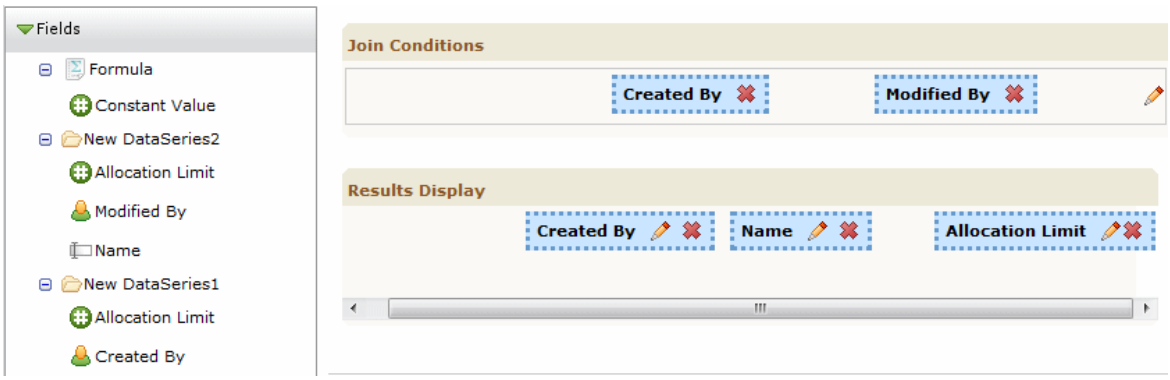
1. Check the **Combine Data Series** box on the **Data** page.
2. Click the **Results Display Configuration** button.

   The **Configuration** page appears.
3. Create join conditions. See Join Conditions for more information about the **Join Conditions** section.
4. Add results to display in the report. See Results Display Fields for more information about the **Results Display** section.

Note: *If you later decide that you want multiple, individual data series, unchecking the box* ***Combine Data Series*** *returns your report to individual series.*

1.5.3.2.3.1 Join Conditions

After you click the **Results Display Configuration** button, you can specify the **Join Conditions**. Each **Join Conditions** section displays as an area into which you drag fields that connect two data series.



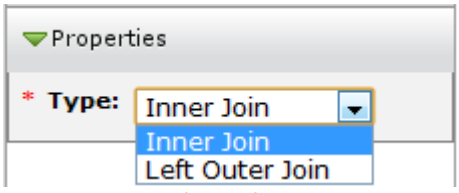
Join Conditions for Two Data Series

The number of join conditions is equal to the number of individual data series you have defined, minus one. For example, a report with four individual data series requires three join conditions. If a data series is not represented in a join condition, its data does not appear in the report.

Consider the following when you drag fields to the **Join Conditions**:

- The fields from each data series should be compatible, meaning that both data types match.
  - **Matching Project fields**—A general Project (relating to "All Projects") can match a specific Project (for one record type) or another general Project. However, two specific Project fields must share the same record type, or they do not match.
  - **Matching Object Link fields**—Object Link fields are always specific to one record type, so they can match a general Project or a specific Object Link of the same record type. Two specific Object Link fields of different record types do not match.
- Each join requires you to drag a field from one data series, and then a compatible field from another data series, into the join condition. Fields must be one of the following datatypes:
  - An Account
  - A User
  - A Contact
  - A Project (Custom Object)
  - An Object Link

Click in the **Join Conditions** area to set the type of join from the **Properties**. The type of join can be an **Inner Join** or a **Left Outer Join**. These join types are equivalent to the types of joins found in your database server.



Types of Join Conditions

1.5.3.2.3.2 Results Display Fields

Drag output fields from the individual data series in the left pane into the Results Display area. Edit the physical order, formatting, and other properties of those fields in the same way you edit an individual data series. See Specifying Data for a Data Series for more information.

You can drag fields from the **Join Conditions** into the **Results Display** area, and (if they are an eligible datatype) from the **Results Display** into the **Join Conditions**. The **Results Display** does not allow the same field, from the same data series, to be dragged in twice.

If you hover the mouse over a field in the **Join Conditions** area or the **Results Display** area, popup text shows the name of the field and the data series and path that contains the field.

1.5.3.2.3.3 Sample for Combining Data Series

Combine data series when you want to see data from more than one record type in a single report.

A common use case for combining data series is a report that includes information about all the accounts associated with a project. An example of this report looks like the following figure.

	Object Link	Matter ID	Total Used	Name	Total Used Total
DISP-000013					Sum: 303,225.00
	DISP-000013-Anderson vs. Jackson	DISP-000013	0.00	Allocated - DISP-000013 - Settlements/Awards	0.00
	DISP-000013-Anderson vs. Jackson	DISP-000013	0.00	Allocated - DISP-000013 - OC Expenses	0.00
	DISP-000013-Anderson vs. Jackson	DISP-000013	0.00	Allocated - DISP-000013 - OC Fees - 2012	0.00
	DISP-000013-Anderson vs. Jackson	DISP-000013	300,000.00	Allocated - DISP-000013	300,000.00
DISP-000014					Sum: 302,865.00
	DISP-000014-Cobell vs. Salazar	DISP-000014	0.00	Allocated - DISP-000014 - OC Fees - 2012	0.00
	DISP-000014-Cobell vs. Salazar	DISP-000014	0.00	Allocated - DISP-000014 - OC Expenses - 2012	0.00
	DISP-000014-Cobell vs. Salazar	DISP-000014	300,000.00	Allocated - DISP-000014	300,000.00
	DISP-000014-Cobell vs. Salazar	DISP-000014	0.00	Allocated - DISP-000014 - Settlements/Awards	0.00
	DISP-000014-Cobell vs. Salazar	DISP-000014	0.00	Allocated - DISP-000014 - OC Fees	0.00
	DISP-000014-Cobell vs. Salazar	DISP-000014	0.00	Allocated - DISP-000014 - OC Expenses	0.00
Grand Total (958 records)					Sum: 24,970,904.60

Sample Report with Two Combined Data Series

To create the sample report

1. Create a report.
   a. From the **Reports** tab, click **New**.
   b. Enter a **Report Name**.
   c. Save the report.
2. Click **Data** in the left pane.
3. Create a data series for a project.
   a. From the **Data Series** page, click **New**.
   b. From the **New Data Series** window, select a project type for **Record Type**.
   c. Enter a **Name** for the data series.

d. Click **Ok**.

e. Select the **Results Display** tab.

f. From the **Systems Fields** folder, drag the following to the **Results Display** section:

- **Object Link**
- **Matter ID**

g. Click **Apply & Close** to save.

4. Create another data series for accounts.

a. From the **Data Series** page, click **New**.

b. From the **New Data Series** window, select **Account** for **Record Type**.

c. Enter a **Name** for the data series.

d. Click **Ok**.

e. Select the **Results Display** tab.

f. From the **Systems Fields** folder, drag the following to the **Results Display** section:

- **Project**
- **Name**
- **Total Used**

a. Click **Apply & Close** to save.

5. Save the report.

When you create or update a data series, you must save the report before you use it to create join conditions.

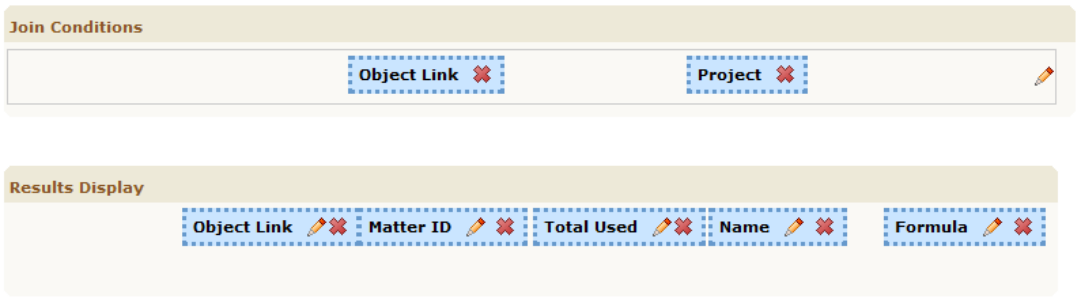
6. Place a check-mark in the **Combine Data Series** check-box on the **Data** page.

7. Click the **Results Display Configuration** button.

8. Drag the following **Fields** to the **Join Conditions** section:

- **Object Link** from the project data series folder
- **Project** from the account data series folder

9. Drag all **Fields** in both folders to the **Results Display** section, as shown in the following image.



Join Conditions and Results Display Sections for the Sample Report

10. Click **Apply & Close** to save.
11. Click **Chart** in the left pane.
12. From the **Group By** field, select **Matter ID**.
13. Click **Save & View** from the save drop-down options.
14. Click **Run Report** to see the combined data series in a report, as shown in the sample report.

1.5.3.2.3.4 Best Practices for Combining Data Series

Follow these suggestions to improve the coordination between individual data series and combined data series:

- If you have done edits on individual data series, save your work before you begin work on a combined data series. If you leave work unsaved for individual data series, you will notice the following effects when working on combined data series:
  - Newly added, unsaved result fields in existing individual data series are not visible in the left pane.
  - Newly added, unsaved individual data series are not visible in the left pane, so they cannot appear in the combined data series report.
- Before you remove a result field from an individual data series, make sure that it is not being used in the combined data series, either as a result field or a join condition field. Otherwise, your attempt to remove the result field from the individual data series will cause an error message.

1.5.3.3 Chart

Use the **Chart** page to specify the visual characteristics of the report.

When using graphical charts, it is recommended that you match the type of data to the appropriate type of chart. For example, if you want to show trends over a period of time, it is best to use a line chart instead of a pie chart because a pie chart is designed to display information for a specific moment in time only.

The **Chart** page presents a Chart Data block for each data series in the report.

Using the Chart Page

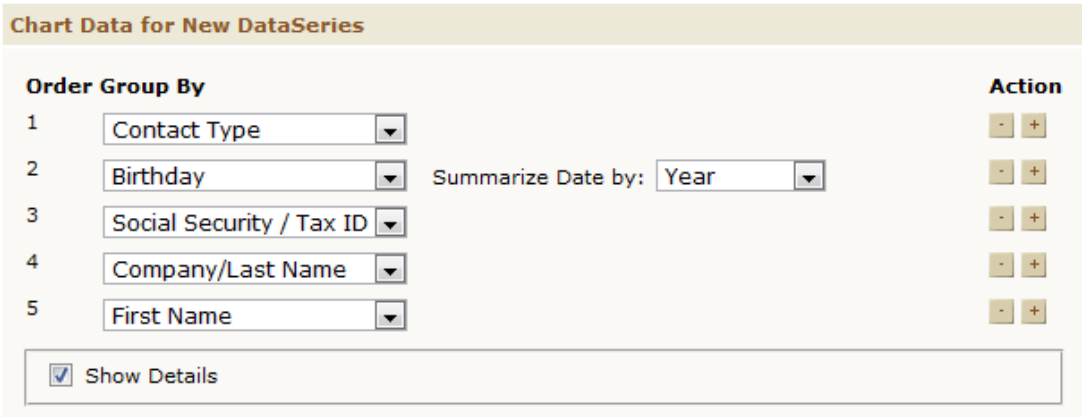
Some chart types aren't effective with certain kinds of data series. Be sure to choose an appropriate type. See Types of Report Formats for more information.

Note: *If there are a very large number of records that fit the filter criteria, the chart will only show the number of search results that your TeamConnect administrator specified in the search results limit setting. For example, if the administrator specified a limit of 3000 search results, but there are 4400 records that fit your filter criteria, then the chart will be based on only 3000 records.*

To create a tabular report

1. In the **Chart Type** section, select **Tabular Only**.
2. Organize the table by groups of data. Use the **Order Group By** field to select one or more data fields. The options in the **Order Group By** drop-down lists are the non-numeric options in the **Results Display** section of each data series.
   a. Under **Order Group By**, select the first field from the drop-down list that you want to group data by in the table.
   b. Click the Add + icon one or more times to group by another data field within the previous field. You can group by up to five data fields.
   c. Click the Remove - icon to remove an extra data field.

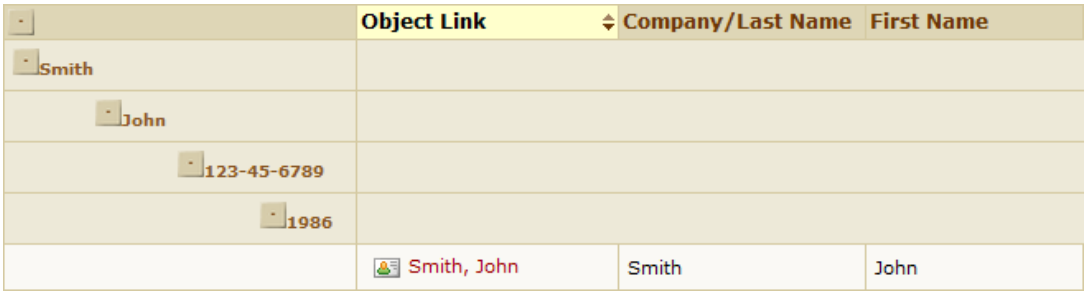
   If you are combining multiple data series in a report, you can only group by one data field.



Organizing a Tabular Report by Groups of Data with Results of these Selections

3. If you select an option that is Date-related, such as **Opened On**, the **Summarize Date By** field appears so that you can specify how to group by the date.
4. If you select a category or a lookup table, the **Summarize Item by** field appears so that you can specify a category or lookup table option.
5. To hide detailed rows in the table, remove the check-mark from the **Show Details** check-box.

   By default, the **Show Details** check-box causes all the fields in the data series to appear in a row after each group of data. If you remove the check-mark, the row of details does not display.



Tabular Report with a Row with Details

6. Repeat steps 2 through 5 as necessary for each additional data series.
7. Enter a **Report Title** and **Report Subtitle** in the **Tabular Report Properties** section.
8. To remove columns for the data fields you are grouping by from the table, remove the check-mark from the **Display group-by field as column** check-box.

   Because each group has a separate summary row at the top of the group, you may not want to display that same value as a column in the report.
9. Select a save option.

To create a column, bar, pie, line, or area report

1. In the **Chart Type** section, select **Column**, **Bar**, **Pie**, **Line**, or **Area**.
2. In the Group By drop-down list, choose the field you want to appear as the axis or category on the chart.

   All chart types, except pie, contain properties for the x-axis. If a chart has multiple data series that use a date/time field for **Group By**, choose a date/time field for **Group By** to ensure a consistent look for the x-axis. The date/time field does not have to be the same field in each data series. Examples of date/time fields are **Opened On**, **Modified On**, **Closed On**, and **Inactive Date**.

   If the **Group By** field is not a date/time field, the same field type should be used in every data series.
3. If you select an option that is Date-related, such as **Opened On**, the **Summarize Date By** field appears so that you can specify how to group by the date.
4. If you select a category or a lookup table for the Group By field, the **Summarize Item by** field appears so that you can group by a category or lookup table option.
5. In the **Chart Value** drop-down list, choose a field for the value axis. The options in this list are the numeric options on the **Data** page, **Results** tab and are used for the value axis. In addition to numeric fields, you may use **Record Count** to specify a simple count of the number of detail records that make up the **Group By**.
6. Repeat steps 2 through 5 as necessary for each additional data series.
7. Use the **Chart Properties** section to complete the following as necessary for each data series:

If you have chosen a **Group By** field, the **Drill-down** field appears. This field is a drop-down list of names of other reports. You can select one of them as a "sub-report". The user who is running the current report can click on an element in the current graphical output (a bar, a pie slice, etc.), and this click action triggers execution of the sub-report that you have chosen. This sub-report uses the clicked-upon Group By as a parameter to limit the sub-report output to just that one category.

- A sub-report only appears in the **Drill-down** list if that sub-report has at least one parameter that is the same datatype as the **Group By** field.

  When your current report is grouping records by date, and it presents data by exact date, then the sub-report must have at least one parameter of the Date datatype. If your current report presents data by month, quarter, or year, then the sub-report must have at least two Date parameters to be eligible to be shown in your choice of reports for drill-down.

- Once you have selected a sub-report in the **Drill-down** list, the parameters of that sub-report are displayed and you must specify settings for each parameter. If there are multiple parameters, you may choose between settings **Use group-by value** (when available) or **Use default value**. At least one of the parameters must be set to **Use group-by value**.

8. (optional) In the **Chart Properties** section, add or edit the appropriate options. The options that you see in this section depend on the type of chart that you select. See Chart Page, Chart Properties Section for field descriptions.
9. In the **Data Ranking** section, complete the following options if desired. Ranking is based on the first **Chart Value** selected in the **Chart Data** section.
   - In the **Show Results** list, select one of the following:
     - **All**: Displays all results in no particular order. This is the default.
     - **Top**: Display results in ascending order.
     - **Bottom**: Display results in descending order.
   - If you selected **Top** or **Bottom**, in the **Maximum Number of Results** box, enter a number to define the number of results to display and in what order, such at Top 5 or Bottom 50. You can enter a number greater than 0, and less than 100.
10. Select a save option.

The tables below contain the default fields for the Reports Chart page, Chart Properties section. The fields that you see may vary based on your system settings, assigned rights, and the type of chart that you are using.

Chart Page, Chart Properties Section

Field (* = required)	Description

Chart Style	The way that you want the selected chart to appear. The available options are based on the type of chart you selected in the **Chart Type** section. Options: • Bar and Column charts—Stacked, Clustered, 3D Stacked, or 3D Clustered • Pie chart—2D or 3D • Area chart—Stacked or Not Stacked This option is not available for Line charts.
Chart Title	The name of the chart.
Chart Subtitle	An additional descriptive name that appears under the **Chart Title**.
Chart Category Label	The label name that you want to appear for the selected category.
Chart Value Label	The label name that you want to appear for the selected chart value.
Legend Position	Whether or not you want this chart to have a legend, and the placement of the legend. Options: • None • Bottom • Right
Show Labels	The way that you want the chart labels to appear: Options: • Uncheck the **Chart Value** box if you do not want the chart values (or currency symbol if applicable) to appear. This option is checked by default. The following options only appear if you are creating a pie chart: • Uncheck the **Chart Category** box if you do not want labels to appear on your chart. • Check the **Chart Percentage** box if you also want to display a percentage for each slice of the pie chart.

X-Axis Label Orientation	The orientation of the X-Axis labels for Bar, Column, Line, and Area charts. Options: • **None**—No axis labels are displayed. • **Wrap**—Displays text horizontally. This is the default. • **Vertical**—Displays text vertically. • **Slant**—Displays test at a 45-degree angle. • **Stagger**—Displays text in an alternating pattern; one above, one below. **Wrap** and **Stagger** are not supported on the Apple iPad, since Adobe Flash is not available on the iPad.
Minimum Chart Value	The lowest number that you want to appear as a value in your chart. You can enter negative numbers in this field.

Chart Page, Group by Options Section

Field	Description
Display group-by field as column	In a tabular report that is grouped, each group will have a separate summary row at the top of the group. This summary row will display the group-by field value. For this reason, you may find it redundant to display that same value as a column in the report. To display the value in a column, check this box (this is the default.) To suppress that column in the report, uncheck this box.

The examples below show a Chart page and the resulting chart based on the selected options:

Chart Data for Actuals

Chart Category: Main Assignee
Chart Value: Total Used
Total: Sum

Chart Data for Allocated

Chart Category: Main Assignee
Chart Value: Total Allocated
Total: Sum

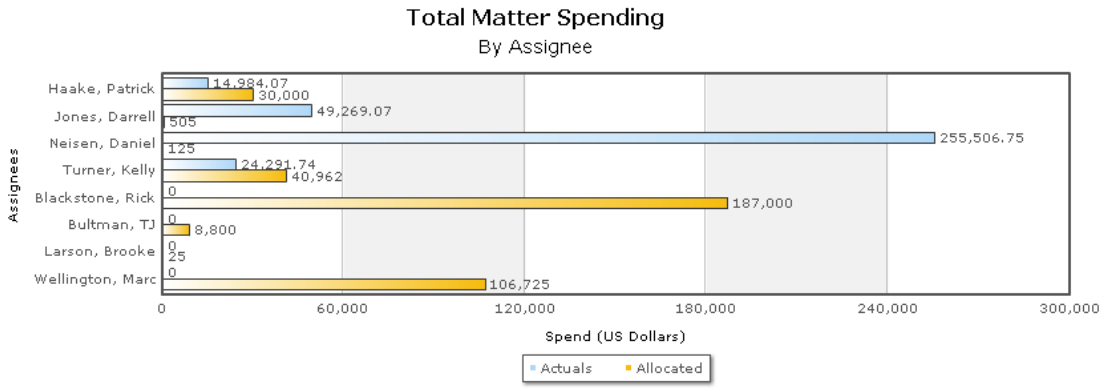
Chart Properties

Chart Style: Clustered
Chart Title: Total Matter Spending
Chart Subtitle: By Assignee
Chart Category Label: Assignees
Chart Value Label: Spend (US Dollars)
Legend Position: Bottom
Show Labels: ☑ Chart Value
X-Axis Label Orientation: Wrap
Minimum Chart Value: 0

Data Ranking

Show Results: All

Sample Chart Page



Sample Resulting Chart

1.5.3.4 Scheduler

Any existing report can be set up to run on an automatic schedule, with its output sent to a list of email recipients. Multiple schedules can be set up against the same report, using different recurrence date/time intervals, different parameters, and different email recipients.

Note: *To edit the Schedule tab in a report design, you need to have the right of report scheduling assigned to you by your TeamConnect administrator.*

Important: *When a report is run on demand, its output is localized to match the locale of the user who requested the run. However, when a report is scheduled, the report output will always be produced in the system default locale.*

1.5.3.4.1 Edit Schedule Information

Each schedule requires information about recurrence, email recipients, and parameters. This information is entered in a similar way for both new and existing schedules. You can gain access to the Schedule tab in these ways:

- Edit a report. Click the Schedule tab.
- From the page that lists reports, click the properties (i) icon for a report. Click the Schedule tab.

To create a new schedule, click the New button.

To edit an existing schedule, click the name of the schedule. On the page that appears, click the Edit button.

To enter basic information about a schedule

1. Enter a value for the name of this schedule. Each schedule within a report must have a unique name.
2. Choose how frequently the report run recurs. Depending upon the frequency you choose, you must supply additional values (e.g. hours and minutes, day of the month, etc.)
3. Specify the start date and time at which this schedule shall become active.

   This is not necessarily the date and time that the report will first run. For example, you might create a schedule that runs on the first day of each month, and specify a start date/time of the 20th of the current month. The report will not run on the 20th; instead, it will run on the first day of the next month. Exact information about the next run time is found in column "Next Run Time" when viewing a schedule (see Viewing a Schedule.)
4. Choose when this schedule shall end (never, after a specified number of recurrences, or on a specified date.)

To enter information about email recipients

1. Choose an address type (To, CC, or BCC).
2. Select whether the recipient is an individual user, or a user group.

3. Choose the individual or group from the drop-down list.
4. Enter a subject for the email (defaults to the name of the report).
5. Enter a description, which will become the body of the email. HTML tags are permitted in the description.
6. Select whether the recipient should receive an Excel attachment or a .pdf attachment.
7. Select whether tabular data should be included with the chart output. For reports whose chart type is "Tabular", this option is pre-selected and not editable.
8. If there are more recipients to add, click the "plus" icon at the right edge of the recipient line to create a new recipient line, and follow the steps above.
9. You may remove existing recipients by clicking the "minus" icon at the right edge of the recipient line.

   Each schedule requires at least one recipient.

Caution: *When a scheduled report runs, it uses the rights of the person who created the schedule to determine what information is included in the report. The report output is emailed to recipients who may or may not have rights to that information in TeamConnect. It is beyond the scope of the TeamConnect application to enforce security in the email recipient list. Use prudence when deciding which recipients get which reports.*

To enter information about parameters

1. Report parameters are displayed, one per line, in this block.
2. If no parameters are visible, that means that the report has no parameters defined for it, and you have no need to edit information in this block.
3. For each parameter that is visible, choose a value that should be passed to the report when it runs. For a new schedule, the values shown for parameters are the default values that were specified when the report was designed. You may enter different values. You may also clear a value for a parameter, leaving its value empty. The report will ignore an empty parameter (will not use that parameter as a criterion) when it runs.

1.5.3.4.2 Viewing a Schedule

Edit a report, then choose the **Schedule** tab when in edit mode. Existing schedules are displayed, one per line. Click on the name of the schedule you wish to view.

1.5.3.4.3 Activating or Deactivating a Schedule

Click on the **Activate** or **Deactivate** button at the top of the schedule. When a schedule is deactivated, all information about the schedule is retained, but the report does not run when a recurrence date/time is encountered. When a deactivated report is activated, no action occurs immediately, but the next time a recurrence date/time is encountered, the report runs as scheduled.

1.5.3.4.4 Running a Scheduled Report Now

Click on the **Run Now** button at the top of the schedule. The report runs immediately, using the information specified in the schedule. This immediate run does not affect the schedule of recurring runs.

Note: *Run Now is not available if the schedule is currently deactivated.*

1.5.3.4.5 Deleting a Schedule

Click on the **Delete** button at the top of the schedule.

1.5.3.4.6 Changing an Existing Schedule's Run Time

After a schedule has been created and saved, it calculates its next run time, which is the value displayed in column **Next Run Time** when you are viewing the Schedule tab of a report. Each time a scheduled report runs, its next run time is recalculated.

If you later edit the schedule and change its frequency and/or its start time, the schedule must recalculate its next run time. It does so based on these rules:

If the schedule's frequency is changed to another value, the schedule refers to its Start date and time, and calculates the next run time which matches the new frequency, and that Start date and time. If that calculated next run time is in the past, the run time is advanced in increments until it is equal to or newer than the present date/time.

If the schedule's frequency is Hours and Minutes, and only the values of the Hours field and Minutes field are changed, the existing value of next run time will remain unchanged. However, when the report runs at that next run time, it will recalculate its run time, and during that recalculation the new values of Hours and Minutes will be used.

1.5.3.5 Security

This page permits you to explicitly declare which users and groups are allowed, or denied, access to the current report.

By default, access to a specific report is granted to any user who has View rights to the record type upon which a data series is based. You do not need to make changes on the Security page unless you wish to override that default behavior.

This page is used in exactly the same way that Security pages are used for other TeamConnect records. For details on how to use Security pages, see Working with Record Security.

Note: *If a report has multiple data series which use different record types, a user must have rights to all of those record types. Otherwise the report is not visible to that user.*

1.5.4 Localizing Reports

When an end user's locale differs from the system default locale, report information is sometimes shown to the end user in their own locale, and sometimes in the system default locale. In general,

pages that relate to listing or executing reports will use the end user's locale, and pages that relate to the properties of a report design will use the system default locale.

"Static" text in report pages will always appear in the end user's locale. Static text includes things like the tab titles, block titles, labels of pushbuttons, labels of data fields, etc. But the data for an individual report is localized according to the rules below.

End user locale will be used for these pages:

- Report list
- Report execution
- Previously executed reports in Recent Items list

System default locale will be used for these pages:

- Report properties (whether editing or viewing)
- Report folder properties
- Previously edited report designs in Recent Items list

In order to localize report properties such as data series names, column headers, etc., there must exist an i18n key for each property. All "out-of-the-box" properties in TeamConnect already have such keys assigned to them. But since you can design brand-new reports that didn't exist in the out-of-the-box design, you need a way to assign such keys to the new report's properties.

This need is addressed by the **Unique Key** fields that are found in the various report design pages. If you do not plan to localize a report, you may leave these fields empty. But if you need to localize the report, each of these fields in the report must have a value. Each Unique Key field accepts characters A-Z, a-z, and/or 0-9. Spaces are not permitted. The values entered in these fields are later used to construct i18n keys that become associated with the report.

The Unique Key properties in the report design pages influence the creation of i18n keys as shown in the following example.

Tab	Description
General	The value entered in **Unique Key** becomes part of the i18n key. If you enter "TaskDueDate", the resulting i18n key becomes "report.TaskDueDate.name". The **Unique Key** value cannot be one that has been used by any other report.
Data	If you enter a data series' **Unique Key** value of "Task1", the resulting i18n key becomes "report.TaskDueDate.dataSeries.Task1.name". Note the use of the report name's key as part of the data series' key. The **Unique Key** value cannot be one that has been used by any other data series within this report. Each field in the result display can have its own Unique Key. If a field in the result display has a field name of "Description" and a Unique Key value of "Descr", the resulting i18n key becomes "report.TaskDueDate.dataSeries.Task1.resultDisplay.Descr.label". The **Unique Key** value cannot be one that has been used by any other result field within this data series. Note that only result display fields that have an entry for their Unique Key

	property will not be exported for localization. Fields with that property empty will use the localized value of the default field label at runtime. Parameters are automatically exported for localization, and you do not have the opportunity to manually enter a **Unique Key** for a parameter. Instead the i18n key is constructed automatically. For a parameter of name "start" the i18n key would be "report.TaskDueDate.parameter.start.label".

1.5.5 Native Reporting FAQ

The following FAQ outlines helpful answers for common questions on report creation and general tips for best practices in reporting. For more detail on Cross-Object Reporting, please see the child page *Cross-Object Reporting FAQ*.

REPORT CREATION

Choose Data Series

What fields am I trying to access in my final report?
What object stores those fields?

Select Filter Criteria

Which fields should be used?
How should those fields be populated?

Select Results Display

What information do I want to present in my report?
Do I need to make any adjustments to properties?

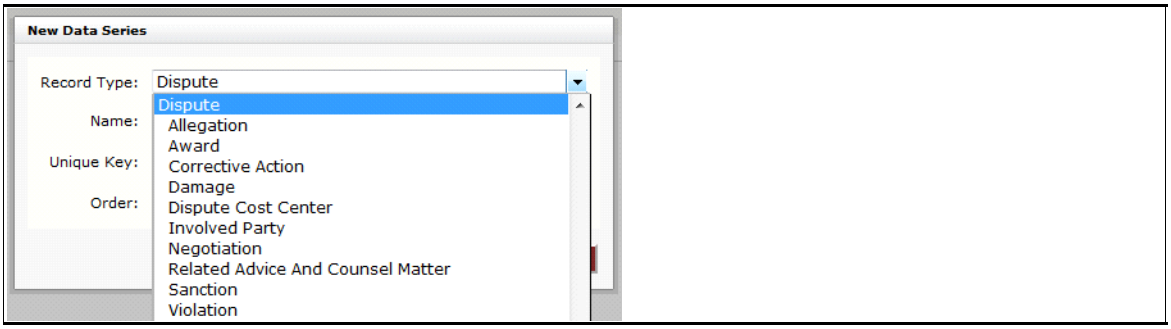
Formatting

What type of chart do I want to use?
How do I want to group my results?

TIPS AND TRICKS

CHOOSE DATA SERIES

Use the identifiers (pictured below) to determine in which object your data is stored. Each different object will have its own Data Series to be used for reporting.



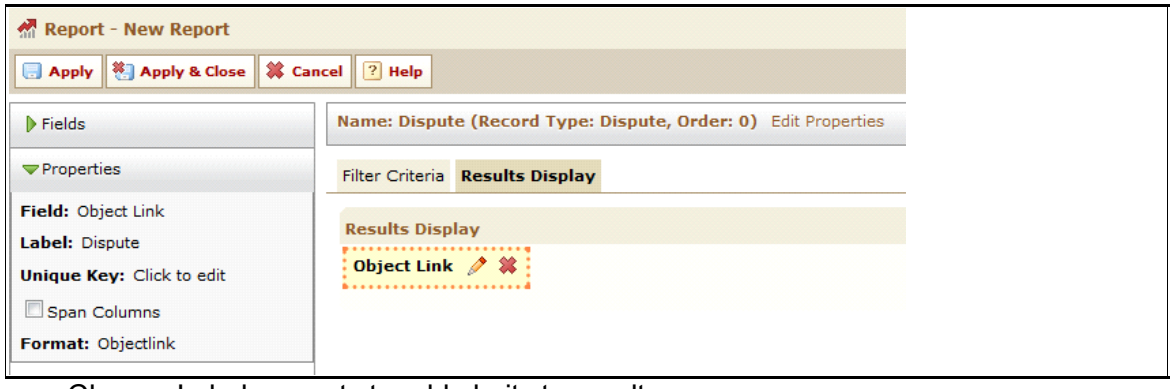
Embedded Objects appear in the Data Series drop-down list **indented below** their parent object

SELECT FILTER CRITERIA

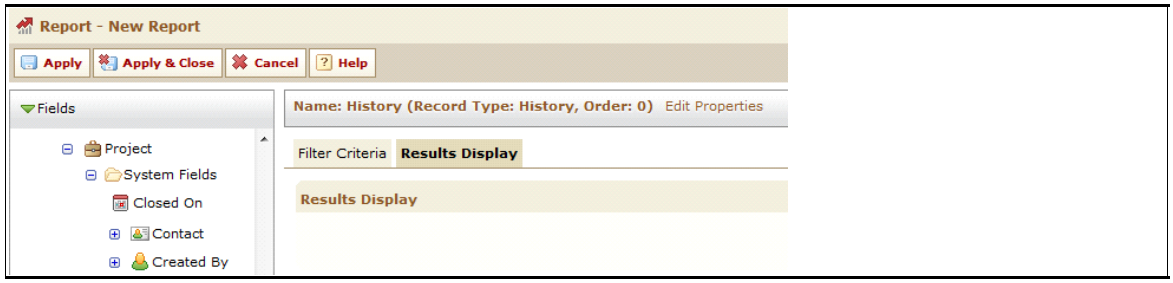
Use Shift and/or Control on Multi-Select Lists when choosing multiple filters
Use **Parameters** for filters that can be manually changed at run-time

Parent Objects can filter based on Embedded Object fields

SELECT RESULTS DISPLAY



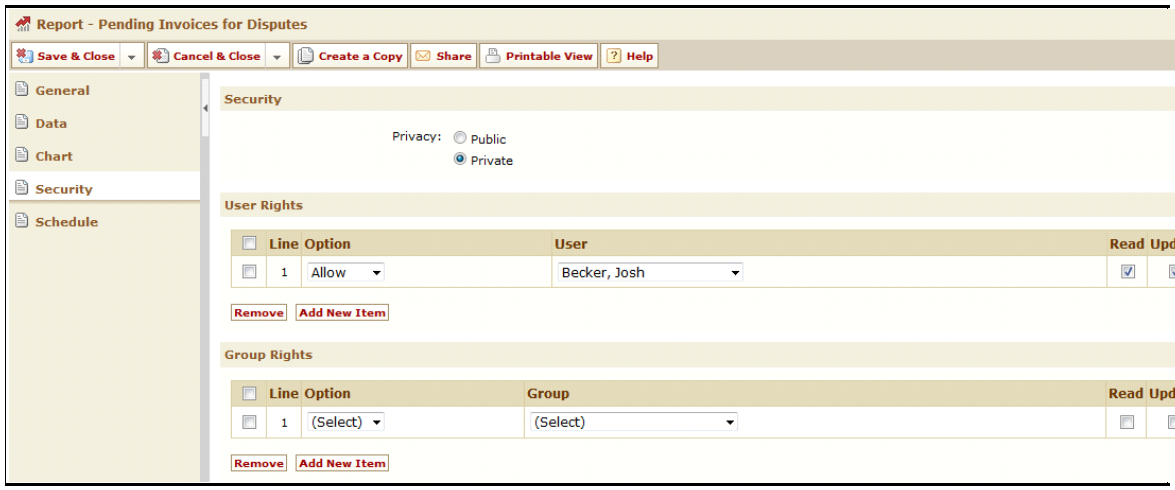
Change Label property to add clarity to results



Only Embedded/Related Objects can include fields from Parent Objects in Results Display

FORMATTING REPORT

1) Chart Type – select different chart options to find the one that works best
   - Options: Bar, Column, Pie, Line, Area
2) Chart Sub-Type – change style of chart, especially useful with multiple data series
   - Options: Clustered, Stacked, Clustered 3D, Stacked 3D
3) Legend – determine where on the screen the legend should reside if at all
   - Options: Bottom, Right, None
4) X-Axis – set how x-axis labels should be displayed, especially useful with long labels
   - Options: Wrap, Vertical, Slant, Stagger, None
5) Labels – choose whether labels for values should be included on report output
   - Options: Show, Hide
6) Results – filter report to only show the Top or Bottom results and how many
   - Options: All, Top, Bottom



FAQs

Q: Is the Data Warehouse the same as one that is used for Business Objects reporting?

A: Yes. The Data Warehouse used for TeamConnect's Native Report is the same repository of information that would be used if working with Business Objects for reporting purposes.

Q: What is a Unique Key?

A: The Unique Key is used with TeamConnect's localization capabilities, which allows you to translate TeamConnect to appear in different languages. A Unique Key is referenced when matching the

existing language to the newly translated language. If your organization does not localize

TeamConnect, a Unique Key does not need to be entered.

Q: How granular are the security options in the Reporting feature? For example, can you allow certain users to run reports only, while others can both run and create reports, but also locking users to certain group-specific folders, etc.?

A: Based on a user's rights, you can control what a user is able to do in general with reporting including whether he/she is able to simply view a report, or do other things like edit reports, create reports or delete reports. Additional security can also be set at the Report level or at the Folder level, which would cascade down to every report in that folder. This higher level of security allows you to grant rights that are specific to a report that has been marked as Private. In the example below, although there are a number of users in the system with the proper reporting rights, only I would be able to read or update this report because it is private and only I have been granted the necessary rights on this particular report. I would not be able to access other private reports without being granted specific permission.

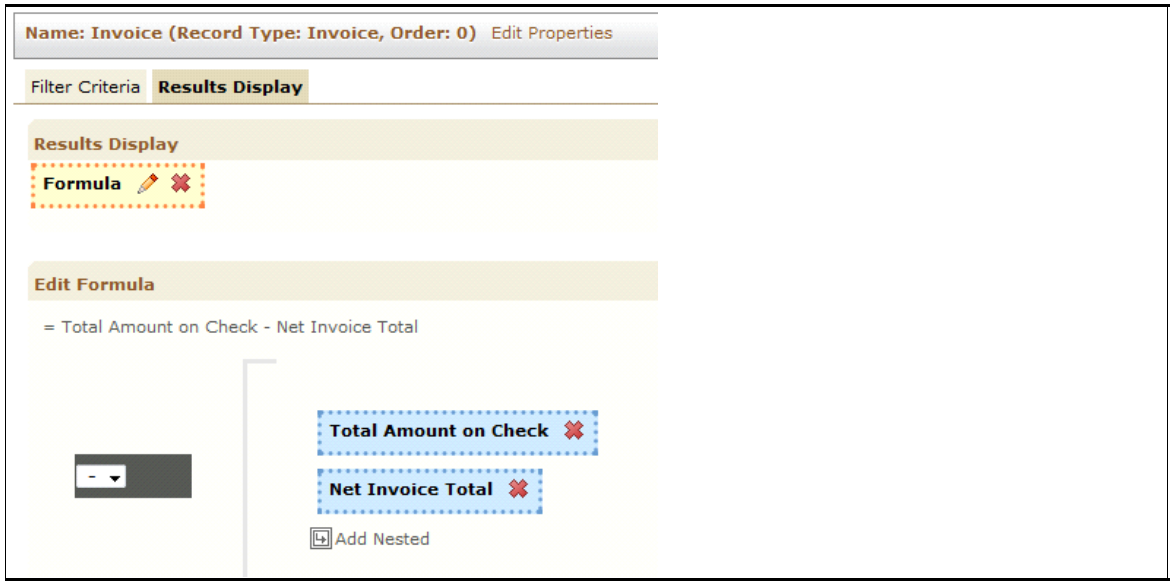
Q: Can multiple Data Series be included in a single report?

A: Yes, you can include any number of Data Series in a report based on your particular needs.

Graphical reports will include every Data Series in the graph output. Pie charts will have a separate pie for each Data Series. Tabular reports will display the Data Series side by side, but not in the same table. Please note that if creating a graphical report with multiple Data Series, you must use the same "Group By" field for each Data Series. This is not required for Tabular reports.

Q: Can report results include a formula?

A: Yes assuming you are using version 3.3 SP1 or later. By dragging Formula into the Results Display, you can then edit the formula to combine multiple numeric fields together using the standard arithmetic functions (add, subtract, multiply, divide).



Q: How do you change the logic for report filters?

A: You can choose between using “And” and “Or” logic when determining the proper filters for a report to provide you with the flexibility to pull in exactly what you need into your final report. To change from “And” to “Or”, or vice versa, simply click directly on the “And” or “Or” and it will change to the other option.

Q: If I schedule a report, how will the results be sent to me?

A: When creating a report’s Schedule, you have the ability to determine whether the results should be attached to the email as an Excel file or as a PDF. You also have the ability to determine whether you want to include the graphical report, the tabular data, or both. Please note only TeamConnect users can be set as the recipient of a scheduled report.

1.5.5.1 Cross-Object Reporting FAQ

Can you join more than two data series in a single report?

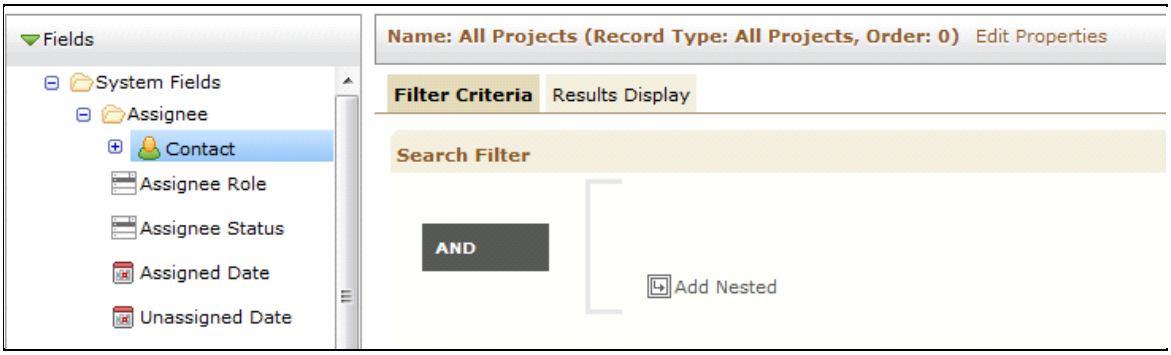
- Yes more than two data series can be joined in a single report. When creating multiple joins between several data series, it is important to remember that the total number of joins should be equal to one less than the total number of data series being joined.

Do you always have to add a Filter Criteria to a report?

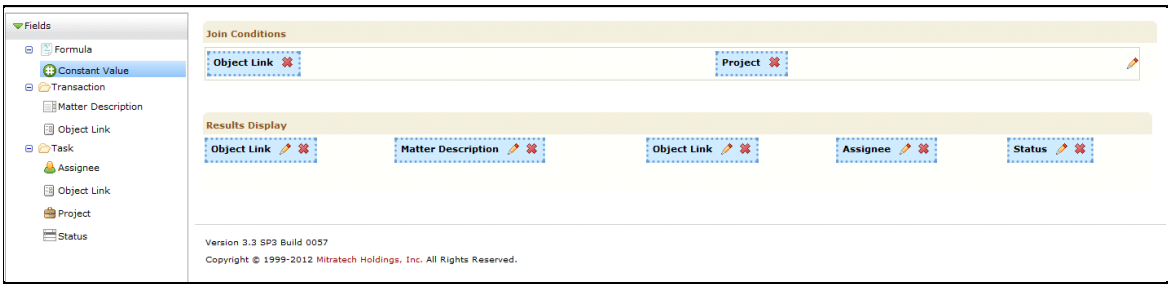
- The use of Filter Criteria on a report is not required. However, depending on the report being created, you will often want to have some level of filter. Without a filter, the report will return all records from that data series, which may be more data than necessary. For example, on a report of all incomplete tasks grouped by transaction with transaction custom fields, it may be helpful to add a phase

filter to the transaction data series. Otherwise, closed transactions would be included in the final report as well.

Can all projects reports be run on any project assignees or only by the main assignee?



- Only the main assignee can be included in the final Results Display when using the All Projects data series, but in terms of the filter, other project assignees can be used. Below is a screenshot of the Filter Criteria that could be used to add a parameter for other assignees that are not the main assignee on a project



Can child and embedded objects be used in a combined report? Will these same concepts also apply when joining with child and embedded objects?

- Yes, child and embedded objects can be used when joining data series. The same concepts apply when using child objects. Embedded objects will not have an object link attribute so embedded objects will have to be joined to the object link of another data series or joined using a different field.

We will be able to add formulas to Cross-Object reports?

- Yes, Cross-Object Reports do support the use of formulas. You will find the option to add a formula within the Results Display Configuration where you specify your join condition and fields for the final Results Display as pictured below. The formula does not have to be added to the Results Display for the individual data series.

Where can we find more documentation on TC 3.3+ Native Reporting?

- There is a chapter on reporting in the TeamConnect User Guide. If you do not already have a copy of the user guide, one can be obtained through the Client Support Center.

Is the Data Warehouse required for reporting?

- Yes, the Data Warehouse is required for the use of TeamConnect's native reporting capabilities. For additional information about the Data Warehouse, please contact your Account Executive.

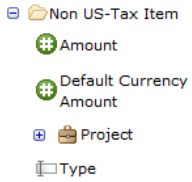
Is there a limit to the number of data series that can be joined in single report?

- There is no known limit to the number of data series that can be joined in a single report. However, multiple joins will require more complex queries that may result in the report taking longer to run.

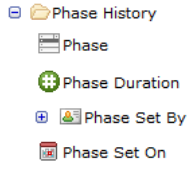
1.5.5.1.1 Cross-Object Reporting - Supplemental Information

Below is a review of the enhancements to native reporting in TeamConnect Enterprise Version 3.3 SP3 and how to make use of these new features in both this version and later TC versions.

- **New Filter Criteria** – Several new filter criteria are now available to help further refine results in your reports
  - **Non US-Tax Item** folder – Available in the Invoice data series under the System Fields folder



  - **Phase History** folder – Available in Custom Object data series such as dispute or transaction under the System Fields folder



- **New Formatting Options** – When creating a Tabular report, there are several new formatting options to help enhance the readability of executed reports. All of these options can be edited on the **Chart** section of the report
  - **Order Group By** – Select multiple fields for grouping reports in a specified order
  - **Summarize Item by** – When selecting a look up table or category as a group by field, Summarize Item by will appear to select the level to be used when grouping by that look up table or category
  - **Title/Subtitle** – A Title and Subtitle can be added to Tabular reports, which can be edited in the Tabular Report Properties of the Chart settings

- **New Data Series** – Two new data series have been introduced to add more options on the data that can be included in a report
  - **Non US-Tax**
  - **All Projects** – Includes all projects from custom objects. Only system fields can be used in the filter criteria and results display.

- **Cross-Object Reporting** – When creating a report with two or more data series, data can be combined to display in a single report and provide greater flexibility in the reporting that can be done using TeamConnect's native reporting. Select the **Combine Data Series** check box and click the **Results Display Configuration** button to specify the join condition and choose fields to be included in the combined results display.

CROSS-OBJECT REPORTING TIPS & TRICKS

- **Creating an Outline** of the data series and fields to be included in a final report before building it can be especially helpful when using multiple custom fields from different data series.

- Be sure to **Save** the Report after any changes are made to the data series being joined, such as creating a new data series or adding fields to an existing data series, otherwise these will not appear in the left pane of the Results Display Configuration and cannot be included in the final report.

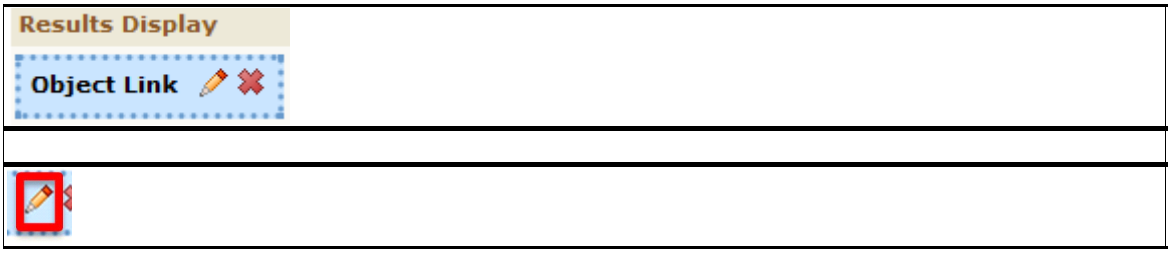
- Be sure to include the field to be used in the join condition in the Results Display for each individual data series; otherwise these will not appear in the left pane of the Results Display Configuration and cannot be used for the join.

- There are five types of fields that can be used when specifying the join condition

– **Object Link**, **Account, User**, **Contact**, and **Project** – the symbols for which are pictured below in respective order.

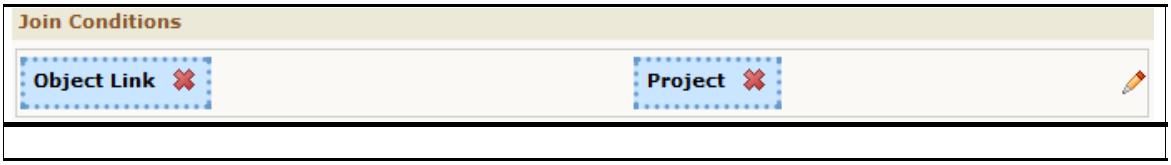
- It is often a good practice to use the **Object Link** from one of the data series in the join. Be sure to select the appropriate field from your second data series that will link back to the same record as the object link of your first data series.

-



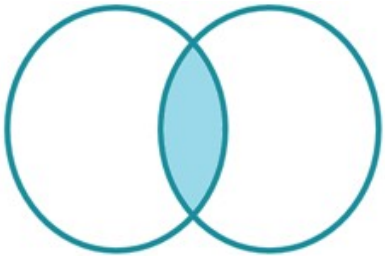
- The use of **Labels** is especially beneficial when combining data series as you will often use multiple fields with similar names in the final results display. Re-labeling your field will help to identify which data series it came from. Labels can be set either in the Results Display of an individual data series or in the Results Display Configuration where you specify the join condition. Click the edit icon of the field used in the results display to change the label.

- Before removing a field from a data series, make sure that it is used in the combined report, either as a field in the results display or in the join condition.

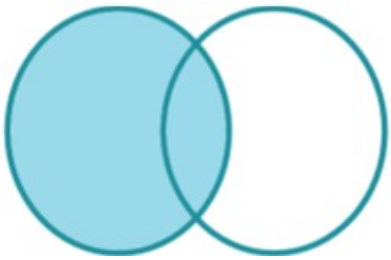


- TeamConnect supports two types of joins: Inner Joins and Left-Outer Joins – to select the join type, click the edit icon on the join condition shown below

  - **Inner Join** – report results include only those in which there is a corresponding project from both data series being joined.



  - **Left-Outer Join** – report results include all projects from the left data series whether a corresponding project from the right data series exists or not. If a corresponding project from the right data series does exist, this will be included in the final results as well, while the field will be left empty if it does not. The left data series is determined by their spatial relationship when specifying the fields to be used in the join condition. In the screen shot above, the data series represented by the object link would have all of its projects returned in a left outer join.



- When creating a report with **Multiple Joins**, the total number of joins should be equal to one less than the total number of data series being joined.

1.6 Appointments Calendar and Tasks

The appointment calendar is a daily planner that you can use to view, add, and edit all of your appointments and tasks.

Appointments may include internal meetings, meetings out of the office, or personal meetings, such as doctor visits or vacation days.

Tasks are various internal assignments that TeamConnect users have to complete, usually when working on projects, such as preparing reports, following up on cases, or reviewing documentation.

Tasks may also be billable time items that need to be tracked by their respective rates on an hourly basis.

1.6.1 Appointments Calendar

Appointments are scheduled events, engagements, or meetings, usually with an assigned location and a specified time. Appointments are made only for TeamConnect users and can be easily associated with specific projects if necessary. Whenever you create an appointment, it is automatically displayed on the calendar screens of the users who are selected as attendees.

There are several different calendar views that you can use to manage your appointments, such as a 30-day calendar view, or a daily calendar view.

Appointment-specific Pages

Each appointment has the following pages on which you can view and edit information:

- **Attendees—**Invite or edit the individuals or groups of individuals that you invite to an appointment.
- **Resources—**Select the additional items that you need for the appointment, such as a conference room or a projector.

Each appointments record also has several other pages on which you can view, enter, and edit additional information that applies to an appointment, such as security rights, or the category for a selected appointment.

The following table shows how you can view, create, and edit appointments.

...Appointments	How...
Viewing	• Viewing the Appointments Calendar • Opening an Appointment • Appointments Created Using Outlook
Creating	• Creating or Editing Appointments • Using the Appointments Scheduler
Updating	• Adding and Removing Appointment Categories • Adding Appointment Attendees • Adding Appointment Resources • Viewing or Creating Appointment History

1.6.1.1 Viewing the Appointments Calendar

Use the appointments calendar to view the appointments that you scheduled, the appointments to which you are an attendee, and any other appointments that you have the rights to view.

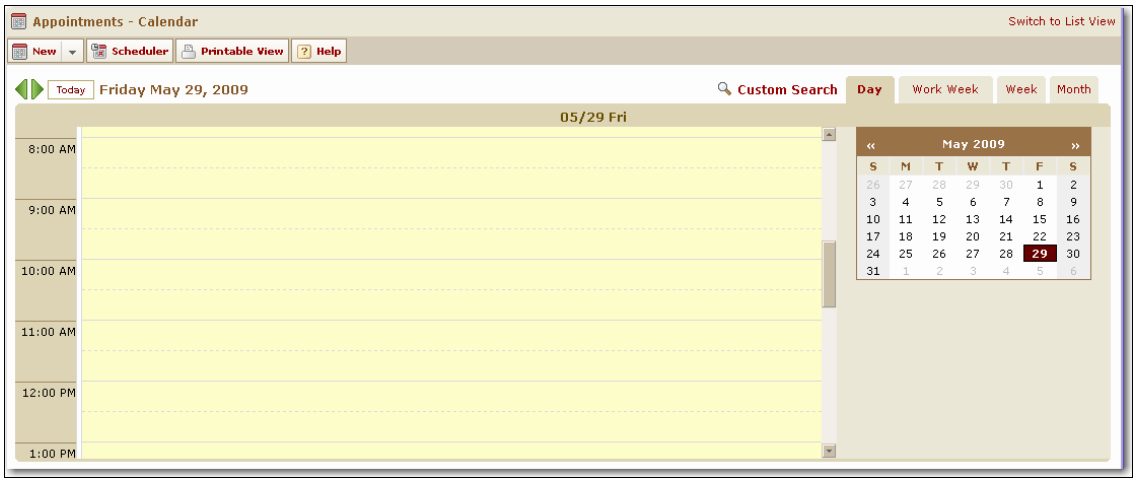
You can also view appointment records in a collection or search for records. See Viewing Collections of Records and Searching for Specific Records.

You can display appointments in several calendar views, such as the day or work week view. In any view, you can create a new appointment or click on an existing appointment to view or edit its details.

To view the appointments calendar

Click the **Calendar** tab, and then click the **Appointments** link under the tab bar.

If this is the first time you opened the calendar, it opens in the default **Day** view. Once you select your preferred view, it becomes the default view.



Calendar Day View

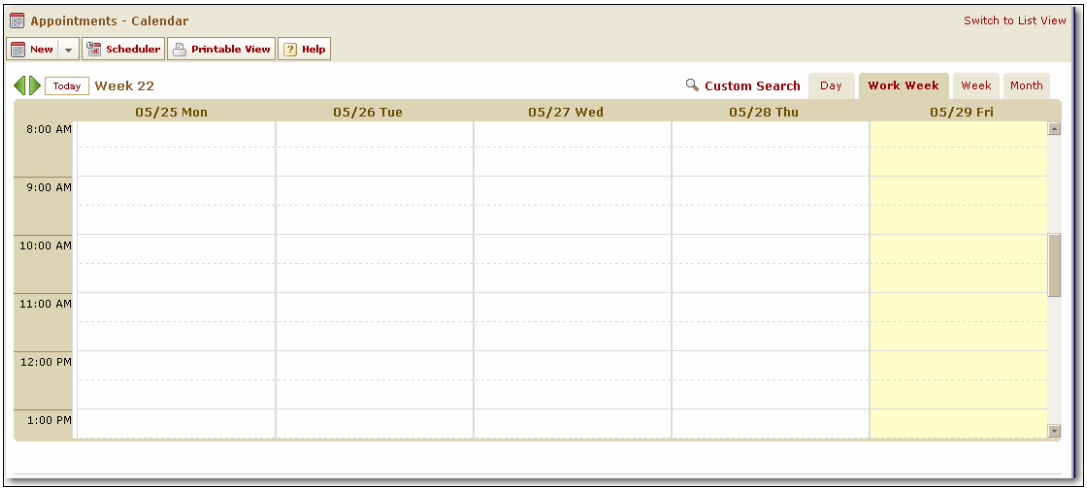
Changing the Calendar View

You can change the way that you view the calendar and move backwards or forwards to view different days, weeks, or months.

Note: *If you are currently in* ***List View****, click* ***Switch to Calendar View*** *to access the additional views.*

To change the calendar view

- Click **Work Week** to view your calendar and appointments in a Monday through Friday format, excluding weekends.

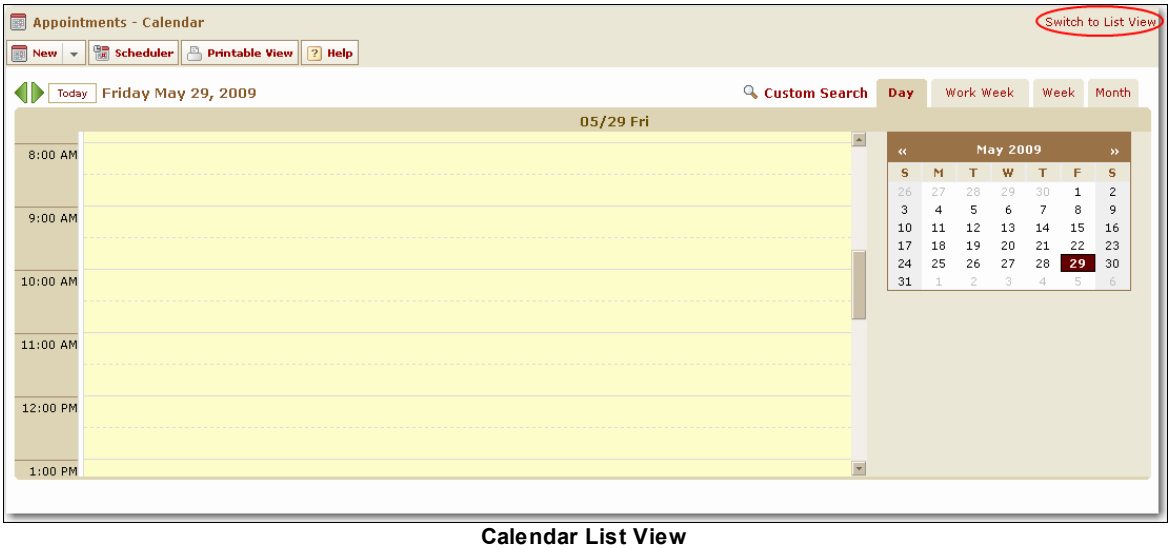


Calendar Work Week View

- Click **Week** to view your calendar and appointments in a 7-day format.
- Click **Month** to view your calendar and appointments in a format that allows you to view all of the days in a month.
- Click **Switch to List View** in any view to return to the default list view.

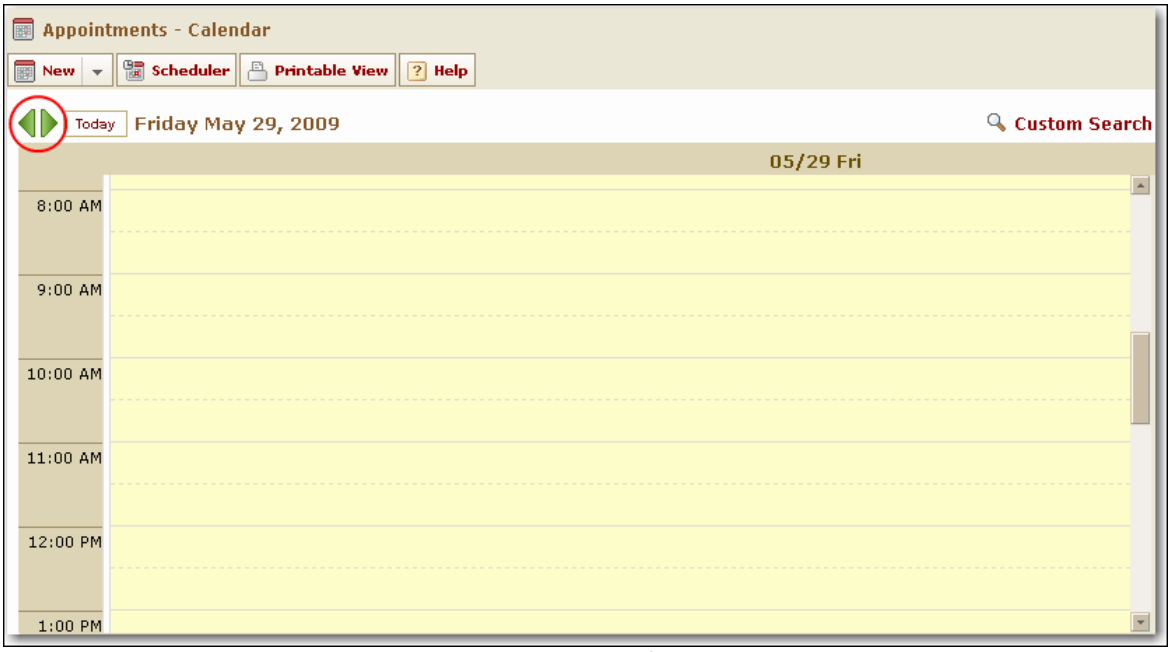
Calendar Navigation

Use the navigation buttons to move forward and backwards to different days, weeks, or months in the Calendar View. These buttons are not available in the List View.



Calendar List View

For information about the areas in the list view, see User Interface.



Navigation Buttons in the Calendar View

1.6.1.1.1 Opening an Appointment

You can open appointments that you created, all public appointments, and appointments that you have the rights to view.

To open an appointment

1. Click the **Calendar** tab.
2. Click the **Appointments** link under the tab bar.
3. If necessary, switch to your preferred calendar view.
4. Locate the appointment that you want to open, and then click its link.

   The appointment opens to its **General** page.

Once you open an appointment, you can edit or delete it, add or remove attendees, and make changes to the additional appointment pages. See Appointments Calendar for more information.

1.6.1.1.2 Appointments Created Using Outlook

If you open an appointment whose **Attendees** page is read-only, this appointment was created using Outlook. See Adding Appointment Attendees for more information.

1.6.1.2 Creating or Editing Appointments

Creating an appointment may include scheduling internal and external meetings, project meetings, or personal appointments, such as a doctor's visit.

When you create an appointment, you set the date and time, and then, if necessary, add resources, such as a meeting room or a projector. Creating an appointment also blocks the time on your calendar so that others can see when you are not available.

You can also use the appointments pages to edit appointments, add categories to an appointment, or attach documents that you want users to review before a meeting.

The following topics apply to creating or editing appointments:

- Creating or Editing an Appointment Manually: If you use this option, you must wait for individual attendees to accept or decline the meeting invitation. You can also use this option to block time for personal appointments, such as a doctor's visit or your vacation so that users can easily see when you are not available.
- Using the Appointments Scheduler: Use the scheduler to check the calendar of each attendee to find an appointment date and time that fits all of the attendees schedules.

You can also schedule appointments that relate to a project. See Adding Appointments to Projects.

Using a Wizard

Your system administrator may provide one or more wizards to help you create new appointments using a guided, step-by-step process. A wizard may be one of the available options or the only option. If you click **New** and a wizard opens, complete the required fields on each page, and then click **Next** to progress to the end of the wizard. When you click **Finish** at the end of the wizard, the record is available in the list view.

Note: *Your company may only allow you to create an account using a wizard, so the option to create an account manually may not be available.*

1.6.1.2.1 Creating or Editing an Appointment Manually

Use the **Appointments Calendar General** page to create or edit an appointment and add attendees and resources.

To create or edit an appointment manually

1. Click the **Calendar** tab.
2. Click the **Appointments** link under the tab bar.
3. Switch to your preferred calendar view, if necessary.
4. Select one of the following options:
   - To create a new appointment, click **New**.
   - To edit an existing appointment, click the appropriate appointment in your preferred calendar view.

     The appointment **General** page opens.
5. On the **General** page, enter or edit the general appointment information. See the Appointments General page fields table for more information.

To enter date and time information for this appointment, use the **Start Time** and **End Time** fields.

6. If necessary, complete the following pages:
   - Click the **Attendees** link to select the individual users, address books, or user groups that you want to attend the appointment. See Adding Appointment Attendees for more information.
   - Click the **Resources** link to select a location or reserve equipment for the appointment. See Adding Appointment Resources for more information.
7. If necessary, use the additional appointment pages to enter or edit supplementary information, such as categories or historical information. See Appointments Calendar for more information.
8. Select a save option.

   An email notification is automatically sent to the attendees if their TeamConnect Preferences are set to receive email notifications. See Setting Up Email Notifications for more information.

The table below contains the default fields for the Appointments **General** page. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Appointments General Page Field Descriptions

Field (* = required)	Description
All Day Event	Indicates whether or not this appointment lasts a full workday. If you choose to create an All Day Event, you cannot specify a start or an end time. (If necessary, you can specify such information in the **Notes** field.)
Location	The location where the appointment is to take place, such as conference room. This field supports up to 250 characters.
Notes	Additional comments that apply to this appointment.
Project	The project that you want to associate with the appointment, if any. Click the search icon to locate the appropriate project.
Start Time **End Time**	The time frame of the entire event. • Click the calendar icons next to the date to open a calendar to select start and end dates. • Click the time drop-down list to select the beginning and ending time for the appointment.

	The system reads the current time from the application server. It automatically rounds time to the nearest hour. For example, at 9:02 a.m., it displays 10:00 a.m. as the start time for the event. By default, all appointments are set to last one hour. If you go back and change these times, and attendees or resources have been scheduled for only part of the appointment, you may need to adjust their attendance times. This field supports the following formats: • MM/DD/YYYY • MM/DD/YY • HH:MM • A.M. or P.M.
***Subject**	The name or reason for the appointment. This field supports up to 250 characters.

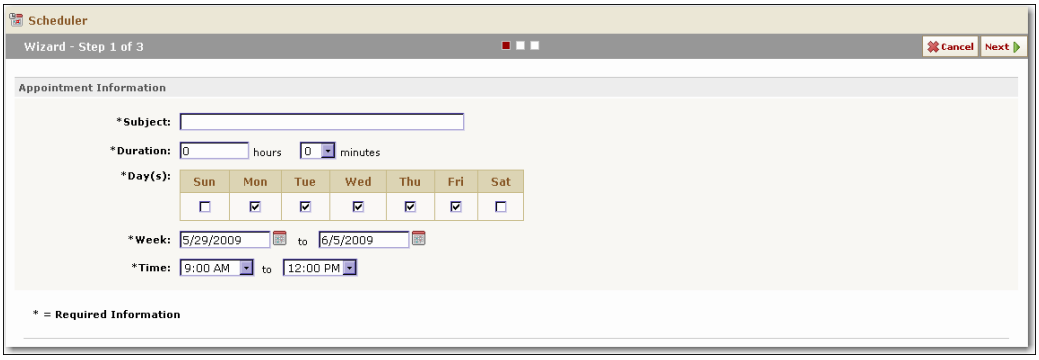
1.6.1.2.2 Using the Appointments Scheduler

The Scheduler is a wizard that lets you search for an available date and time on anyone's calendar, check the availability of the necessary resources, create the appointment, and then add the appointment to the attendees' calendars.

To use the appointments scheduler

1. On your home page, click the **Calendar** tab, and then click the **Appointments** sub-tab link.
2. Click **Scheduler**.

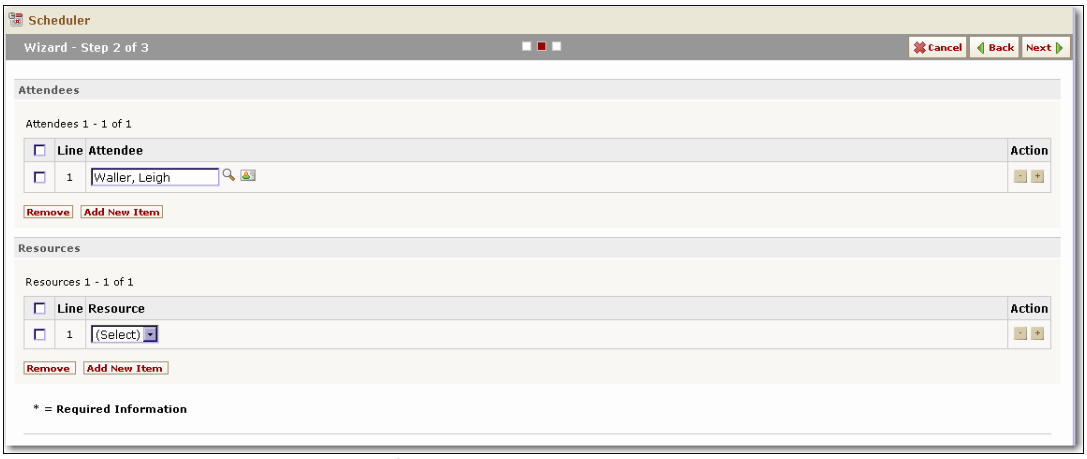
   The first page of the scheduler wizard opens.
3. On the first screen complete the fields in the Appointment Information Field Descriptions table.



First Page of Scheduler

4. Click **Next**.

   The **Attendees and Resources** page opens.



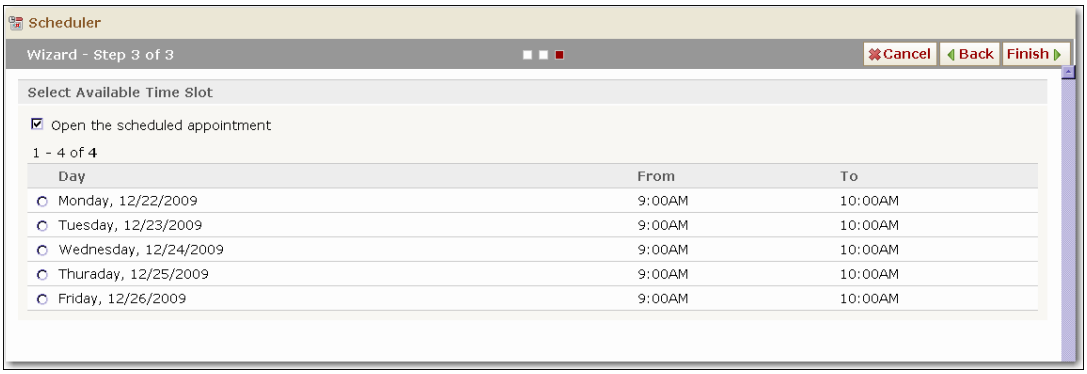
Scheduler Wizard Page Two

5. In the **Attendees** field, select from the drop-down list or click the search icon to search for users or click the contacts icon to search for contacts. The selected user or contact appears in the attendees list. To invite additional users, click **Add New Item** and continue adding users until your list is complete.

6. In the **Resource** drop-down list, select the resources that you may need, such as a conference room or a projector. To select additional resources, click **Add Another Item**.

7. Click **Next**.

   Based on the criteria that you entered, the system searches the calendar of each attendee to find a date and time when everyone is available to meet, and then returns one or more results.



Scheduler Wizard Page Three

8. On the **Select Available Time Slot** page, select the option that you prefer.

   If you want to open the appointment to its **General** page after the appointment is saved, select the **Open the scheduled appointment** check-box.

9. Click **Finish**.

An email notification is automatically sent to the attendees if their preferences are set to receive email notification. See Setting Up Email Notifications for more information.

In response, attendees can use the appointment calendar to accept or decline the invitation. If an attendee accepts this invitation, the item is automatically added to their calendar.

Appointment Information Field Descriptions

Field	Description
Subject	Enter the name of the appointment or meeting.
Duration	Enter how long the appointment or meeting will last.
Days(s)	Click the boxes for the days that you want to check on everyone's calendar.
Week	Enter the date span that you want to check on everyone's calendar.
Time	Enter the time span that you want to check on everyone's calendar.

1.6.1.3 Adding and Removing Appointment Categories

Use the Appointment **Categories** page to add a category to an appointment. Appointment categories such as Conference, Deposition, or Trial help attendees understand the nature of the appointment they are attending and allow them to search for appointments by category.

Categories may have one or more sub-categories and are listed in a hierarchical view with the main category at the top and all of its sub-categories listed below it.

Based on your access rights, you can view, add, change, or delete categories.

See Setting Category Details for more information.

1.6.1.4 Adding Appointment Attendees

Use the Appointment **Attendees** page to invite the appropriate people or groups of people to an appointment. With the appropriate rights, you can add the following types of attendees to appointments:

- Individual contacts who are also TeamConnect users
- Address Books that contain the people that you want to attend the appointment

  For address books, only members who are also TeamConnect users are added as appointment attendees. Members who are not TeamConnect users are not added or notified.
- User Groups that contain the people that you want to attend the appointment

The user who creates the appointment is automatically added as an attendee.

To add appointment attendees

1. Click the **Calendar** tab, and then click the **Appointments** sub-tab link.
2. Locate the appropriate appointment and open it.
3. In the left pane, click the **Attendees** link.

   The **Attendees** page opens.

   You are automatically added as the appointment creator. If you are scheduling this appointment for others and you do not want to attend, delete yourself from the attendee list.
4. Click **Edit**.
5. Click **Add New Item**.
6. In the **Type** drop-down list, select the type of attendee that you want to add. Options are **Address Book**, **Group**, and **User**.
7. In the **Attendee** drop-down list, select the appropriate attendee. Your choices are based on the option you selected in the **Type** drop-down list.
8. Repeat steps 4 and 5 until all of the appropriate users are added.

   Tip: *By default, the option in the **Attendance** drop-down list is set to **Will Attend** for all attendees. You do not have to change it.*

9. Select a save option.

   The appointment automatically appears on the calendars of all attendees.

To remove appointment attendees

To delete attendees, select the check-box for the attendees that you want to remove, and then click **Remove**.

1.6.1.5 Adding Appointment Resources

Use the Appointment **Resources** page to add a location for the appointment, or equipment that you may need, such as a projector.

To add appointments resources

1. Click the **Calendar** tab.
2. Click the **Appointments** link under the tab bar.
3. Locate the appropriate appointment and open it.
4. In the left pane, click the **Resources** link.
5. Click **Edit**.

6. In the **Resource** drop-down list, select the appropriate item or location.
7. If you want to add additional items, click **Add New Item**, and then select the additional items or locations.
8. Select a save option.

To delete resources

To delete resources, select the check-box for the resource that you want to remove, and then click **Remove**.

1.6.1.6 Viewing or Creating Appointment History

Use the Appointment **History** page to view and write historical details for an appointment, such as the points discussed in a meeting, or the details of a previous meeting.

See Working with Record History for more information.

1.6.2 Tasks

Tasks in TeamConnect are internal assignments that TeamConnect users have to complete, usually when working on projects, such as preparing reports, following up on cases, or reviewing documentation. A group of tasks is a list of items, often in order of importance.

Tasks can be one of the following:

- **Non-billable—**Tasks that a user must complete that have no associated money costs, such as preparing a report.
- **Billable—**Tasks that are tracked by their rates on an hourly basis. All billable tasks can be posted against certain accounts according to the posting criteria that is set for each individual account. See Posting Tasks for more information.

Each task record lets you enter all the information related to a given task on the same record page.

Types of Tasks

There are two types of tasks:

- **Project-specific—**Tasks that must be performed to move a project forward to completion.
- **Global—**Not associated with any project, such as preparing payroll reports.

Task-specific Pages

Each task record has the following task-specific pages:

- **General—**Create and edit tasks information, including the subject, due date, and task assignee.

- **Transactions—**Displays a history of the task's posting and voiding statuses and allows you to access the related account record.

Each task record also has additional pages on which you can view and edit specific information, such as a **Documents** page where you can store documents that are related to a task. See Viewing Documents for more information.

The following table shows how you can view, create, and edit tasks.

...Tasks	How...
Viewing	• Viewing Tasks • Viewing Task Transactions
Creating	• Creating or Editing Tasks • Creating a Task Manually • Creating Multiple Tasks
Updating	• Assigning or Reassigning Tasks to Users • Posting Tasks • Voiding Tasks • Viewing or Creating Task History • Using the Task Entry Tool • Editing Multiple Tasks • Posting Multiple Tasks • Deleting Multiple Tasks

1.6.2.1 Using the Task General Page

On the **General** page, you can perform the following actions:

- Copying a Record
- Assigning or Reassigning Tasks to Users
- Posting Tasks
- Voiding Tasks

1.6.2.2 Viewing Tasks

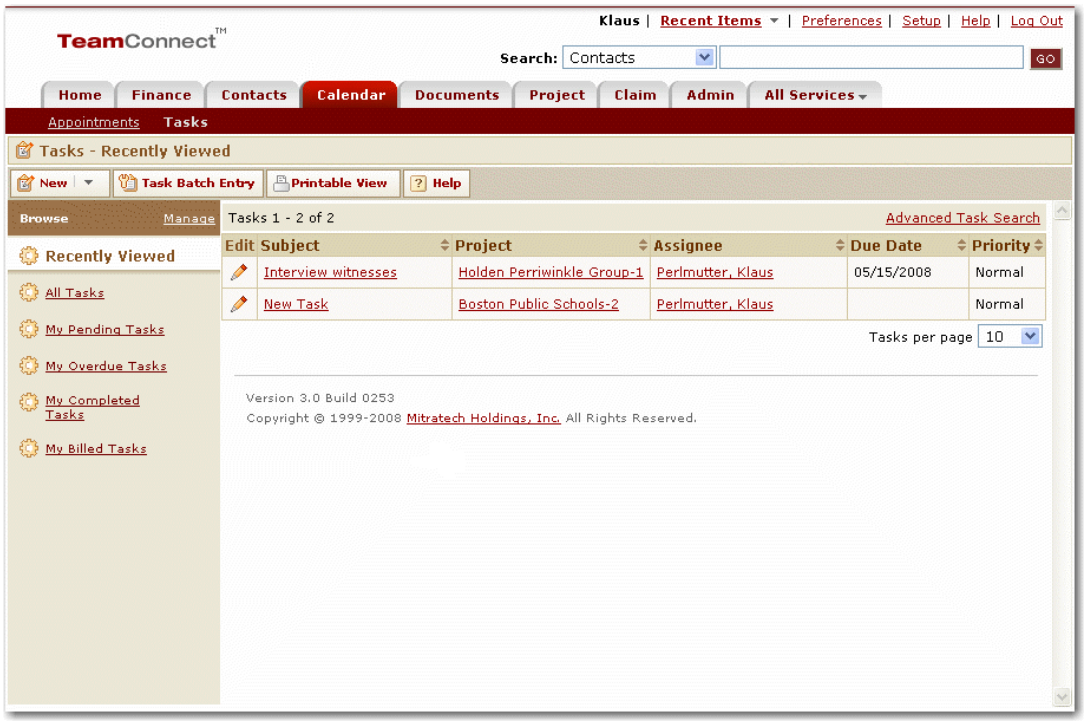
You can view tasks in a list view.

You can also view tasks in a collection or search for records. See Viewing Collections of Records and Searching for Specific Records.

To view a task

1. Click the **Calendar** tab.
2. Click the **Tasks** link under the tab bar. The **Tasks** list page opens.

   If necessary, click a task collection link in the left pane, such as **Recently Viewed** or **All Tasks**.
3. To open a task, click its link in the **Subject** column.



Tasks List Page

For information about the areas in the contact views, see User Interface.

1.6.2.3 Creating or Editing Tasks

Use the **General** page to create and edit tasks.

A task record can serve as a simple reminder to work on an assignment, or it can be a billable time item, which you will eventually post against a related account.

When you create a task, you can track the time for a project or vendor, and then post the task.

The following topics apply to creating or editing tasks:

- Creating a Task Manually--Create a task starting from a blank Task record.
- Copying a Record--Use an existing Task record to create a new task when many of the setting are the same.

Using a Task Wizard

Your system administrator may provide one or more wizards to help you create new tasks using a guided, step-by-step process. A wizard may be one of the available options or the only option.

If you click **New** and a wizard opens, complete the required fields on each page, and then click **Next** to progress to the end of the wizard. When you click **Finish** at the end of the wizard, the new record is saved.

Note: *Your company may only allow you to create an account using a wizard, so the option to create an account manually may not be available.*

Other Areas Where You Can Create Tasks

There are several areas in TeamConnect where you can create tasks:

- The **Tasks** List page--Based on your rights, you can create or edit a task. See Viewing Tasks for more information.
- The **Tasks** page for a project--Open a project and use its **Tasks** page to create or edit a task. See Viewing Tasks for more information.
- The Task Entry Tool--Create and edit multiple tasks in one operation. See Using the Task Entry Tool for more information.

1.6.2.3.1 Creating a Task Manually

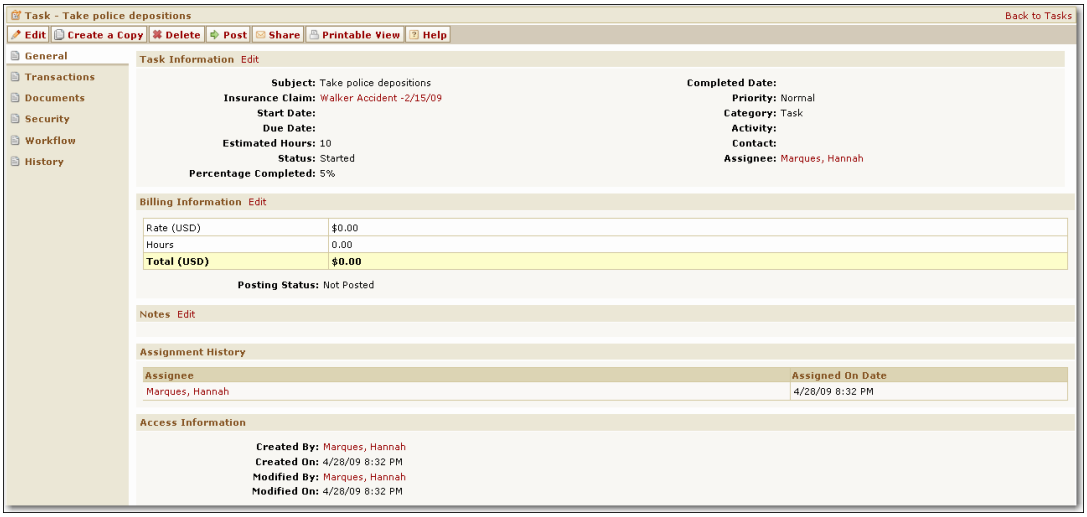
Use the Tasks **General** page to create a task starting from a blank record.

To create or edit a task manually

1. Click the **Calendar** tab.
2. Click the **Tasks** link under the tab bar.

   The **Tasks** List page opens.
3. Select one of the following options:
   - To create a task, click **New**.
   - To edit a task, click to the left of a task name.

     The task record opens to its **General** page.



Tasks General Page

4. On the **General** page, enter or edit the appropriate information in the available sections, including billing information if appropriate. See the the Task General page fields table for more information.

   The following fields are required:

   - Subject
   - Assignee

   Based on your rights, this page may also contain custom fields that appear based on the option that you select in the **Category** drop-down list. Complete these fields according on your company policies.

5. Select a save option.

The tables below contains the default fields for the Tasks General page. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Task Information

Field Name (* = Required)	Description
Activity	The appropriate activity type for the task. ***Note:*** *Typically, this field is used as a subcategory for the fee.*
***Assignee**	The user assigned to the task. If you are creating a task, this field displays your name. For an explanation of how to assign a task, see Assigning or Reassigning Tasks to Users.

Category	A project category for the task, such as follow up, review file, or status report. If the current task has no project (global task), use the system category **Task**. Inactive categories, if any, are displayed but cannot be selected. The category that you select may allow custom fields to appear on the **General** page. Complete these fields based on your company policies. ***Important:*** *Each task may have only one category.*
Completed Date	The date when the task is completed. Select it by clicking the **Calendar** icon next to the field. If you enter the current date as the **Completed Date** then save, the **Status** changes to **Completed** and the **Percentage Completed** to 100.
Contact	Search for and select the appropriate contact. You may use this field, for example, to let the task track the time spent working on assignments by a specific contact. ***Note:*** *This field serves as a vendor posting criterion, if you decide to post the task. For more information, see Posting Tasks.*
Due Date	The date when the task is due. Select it by clicking the **Calendar** icon next to the field. ***Note:*** *Certain tasks may have no specific due date. These tasks are known as floating tasks.*
Estimated Hours	The approximate number of hours needed to complete the task.
Hours	The number of hours required to complete the task, such as number of hours or number of items. This applies to billable hours only.
Percentage Completed	The approximate percentage of the task already completed. When you enter 100 then save, the **Completed Date** field automatically displays the current date and the **Status** field changes to **Completed**.
Priority	One of the following priority levels for the task: **Highest**, **High**, **Normal**, **Low**, **Lowest**. The default is **Normal**.
Project or	Displays one of the following types of information:

Project name	• If you are working within a project, this field is read-only and displays the name of that project, for example, **Claim** or **Program**. • If you access the current task using **Calendar > Tasks**, an optional field **Project** allows you to choose a project to associate with the task. Select a project for the task if there is no current project.
Start Date	The date when the assignee is supposed to start working on the task. Select it by clicking the **Calendar** icon next to the field.
Status	One of the following descriptions to indicate the status of the task: **Started**, **Not Started**, **Completed**. ***Note:*** *When you choose **Completed then save**, the **Percentage Completed** field automatically changes to 100, and the **Completed Date** displays the current date.*
***Subject**	A brief description of the task.

Billing Information

Field Name	Description
Hours	The amount of time in hours billed to the task.
Posting Status	Displays task's posting status, which may be: • **Not Posted—**The task has not been posted, or it has been voided. • **Posted—**The task is posted to an account. • **Failed—**An unsuccessful attempt was made to post the task. • **Posted For Approval—**The task has been submitted for approval to be posted. The text in this field is read-only.
Rate	The amount charged per task unit. ***Note:*** *If the task has a contact, and that contact has a specified rate entered, TeamConnect automatically displays that rate here. For more information on contacts and rates, see Setting Contact Rates.*
Total Amount	The total cost of the task after you save, calculated by the system using the rate and units shown on this page. The text in this field is read-only.

Access Information

Field Name	Description
Created By	The name of the user who created the task.
Created On	The date the task was added to TeamConnect.
Modified By	The name of the user who last modified the task.
Modified On	The date when the task was last modified.

The **Notes** section allows you to enter comments about the current task. For information about the **Assignment History** section, see Assigning or Reassigning Tasks to Users.

1.6.2.4 Assigning or Reassigning Tasks to Users

Use the **General** page to assign an individual user to a task. Each task must have an assignee who is responsible for completing the task. If you create a task, you are the assignee by default, but you may reassign the task to a different user if necessary.

To assign or reassign a task

1. Click the **Calendar** tab, and then click the **Tasks** link under the tab bar.

   The **Tasks List** page opens.

2. Select one of the following options:
   - To assign a task, click **New**.
   - To reassign a task, click the edit icon .

   The **General** page of the task opens allowing you to enter information. For details, see the Task General Page Field Descriptions.

3. Use the drop-down list in the **Assignee** field to choose the user you want to assign to this task.

4. Select a save option.

Note: *If the appropriate preferences are set, TeamConnect automatically sends an e-mail notification to a new assignee.*

The following table explains the fields in this section of the **General** page. The text in this section is read-only.

Assignee History

Field or control	Description
Assignee	Displays a list of names of the task's assignees in the order in which they were added, with the first added at the top of the list. ***Note:*** *You cannot click on the* ***Assignees*** *heading to sort assignees alphabetically.*
Assigned On Date	Displays the date when an assignee was assigned to the task.

Points to Remember

The following list summarizes key information about task assignments:

- By default, the name of a user creating a task displays in the **Assignee** field.
- You may only assign users to a task.
- A task can only have one active assignee at a time, the current assignee.
- The **Assignee History** section of the **General** page is read-only and displays all previous assignments.
- Make reassignments as follows:
  - *Individually,* by choosing a new user name in the **Assignee** field.
  - *In batch,* using the **Reassignment** tool accessible from the **Tools** drop-down list in the **All** tab.

1.6.2.5 Posting Tasks

Use the toolbar and the **General** page to post tasks against accounts. When a task posts successfully, TeamConnect debits its expense total from any linked account's current balance.

Before posting a task, you must make sure the following conditions are met:

- The task must be billable.
- The task's status is **Completed**. For more information, see Task General Page Field Descriptions.
- One or more accounts are linked to the task by way of the task's category.
- Any linked account is active and allows posting.
- Any linked account can accept posting by this task, for example:
  - There must be adequate account funds.
  - The task's completion date must be within any linked account's time period.

- You must have rights to any linked account.

You may also create and save a billable task, and then post it later. TeamConnect stores the record until you are ready to post or delete it. You can also use the General page to edit a posted task.

To post a task

1. Open the **General** page of the task.

   If the task's posting status is **Not Posted**, **Failed**, or **Posted For Approval**, the **Post** button appears in the toolbar.

2. Click **Post**.

   The total for the task is debited from any linked account. After posting a task, you may view the corresponding account transaction entries. To do so, go to the **Transactions** pages of the task and any linked account. For more information, see Viewing Task Transactions.

Note: *After posting, the task's system fields become read-only. Depending on system settings and your rights, one or more custom fields may be editable. If the task is voided, you may edit the task's system fields, if necessary. For more information, see your administrator.*

To post multiple tasks

TeamConnect allows you to post many tasks in one operation. See Using the Task Entry Tool for more information.

To edit a posted task

1. Void the task using its **General** page. For details, see Voiding Tasks.
2. Edit the task, as necessary. For details, see Creating or Editing Tasks.
3. Post the task again, if necessary.

1.6.2.6 Voiding Tasks

Open the **General** page of a task to void it.

Voiding a task lets you cancel a posting for any reason, such as if you received a refund and need to back out the original posting, or found a mistake in the dollar amounts. Voiding the original account credits the account by the expensed amount.

To void a task

1. Open the **General** page of the task that you want to void.

   If the task's posting status is **Posted**, the **Void** button appears in the toolbar.

2. Click **Void**.

   The total for the task is credited to any linked account.

   After voiding the task, you may view the corresponding account transaction entries on the **Transactions** page for this task. See Viewing Task Transactions for more information.

If necessary, you may edit the task's fields, and then post the task again.

1.6.2.7 Viewing Task Transactions

Use the **Transactions** page to view a history of posting transactions for a given task. Posted tasks appear in a convenient list that includes information, for example, the date the task was posted. For another example, if you need information on a task and want to know who posted it, you may use this list to view that user's name.

Transactions you may or may not view depend on the access rights to the related task and any of its linked accounts.

To view task transactions

1. Display the **General** page of the task.
2. Click **Transactions** in the left pane.

   A list page opens showing the task's previous transactions.
3. If necessary, click an account name link to view information on any linked account.

Note: *The **Transactions** page is read-only. You may only edit tasks using the appropriate **General** page.*

1.6.2.8 Viewing or Creating Task History

Use the Task **History** page to create a history for a task. A history is one or more text notes about changes to the task. You may also use this page to view a list of history records for that task or to do an advanced search on a task's history entries.

You always have the rights to a task history you created. However, you may regulate rights that other users have to this history.

For more information, see Working with Record History.

1.6.2.9 Using the Task Entry Tool

You may perform the following operations using the Task Entry Tool:

- Creating Multiple Tasks
- Editing Multiple Tasks
- Posting Multiple Tasks

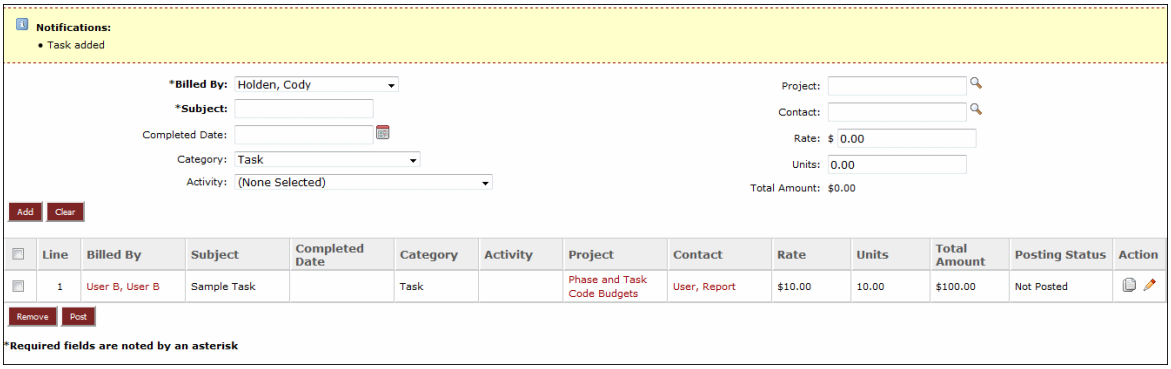
- Deleting Multiple Tasks

1.6.2.9.1 Creating Multiple Tasks

The Task Entry Tool provides a convenient way to create multiple tasks quickly in one TeamConnect page.

Caution: *When using the **Task Entry Tool** page, if you navigate away from the page, you lose all work done since your last **Add** or **Save** action. If you go back to the **Task Entry Tool** page after navigating away, you must create a new set of tasks and a new work session to continue working in the page. For example, if you want to edit a copy of a task you created in this page, the best practice is to finish all the work you want to do during your current page session before you navigate away to edit the copy.*

When you finish a session and save your work, you may then edit the task copies you made during the session. You may access tasks previously created in this page using the **Task** list page or **General** page.



Creating Tasks Via Task Entry Tool

To create multiple tasks

1. On the toolbar of the Task list or on the General page, click **Task Entry Tool**.

   The **Task Entry Tool** page opens.

2. For each task, enter information in the **Task** pane. See the Task Entry Tool field table for field descriptions.

3. Click **Clear** to clear all field entries, if necessary.

4. Click **Add** to create and save each task.

   The task appears in the List pane below.

   For more information, see the Task General page field table.

5. Click to create and save additional copies of the current task.

   Each copied task appears in the list pane.

The table below contains the default fields for the Task Entry Tool. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Task Entry Tool Field Definitions

Field Name (* = Required)	Description
Activity	The activity type for the task, if applicable. ***Note:*** *Typically, this field is used as a subcategory for the fee, if applicable.*
***Billed By**	The name of the user (same as **Assignee**) assigned to the task. If the task is billable, this is the contact billing the task.
Category	A project category for the task, if applicable, such as follow up, review file, or status report. If the current task has no project (global task), use the system category **Task**. ***Important:*** *If assigned, each task may have only one category.*
Completed Date	The date when the task is completed. Select it by clicking the **Calendar** icon next to the field.
Contact	Search for and select the appropriate contact. You may use this field, for example, to let the task track the time spent working on assignments by a specific contact. ***Note:*** *This field serves as a vendor posting criterion, if you decide to post the task, and it is billable. For more information, see Posting Tasks.*
Project or Project name	Displays one of the following types of information: • If you are working within a project, this field is read-only and displays the name of that project, for example, **Claim** or **Program**. • If you access the current task using **Calendar** > **Tasks**, an optional field **Project** allows you to choose a project to associate with the task. If you want, select a project for the task if there is no current project.
Rate	The amount charged per task unit, only for a billable task.

	Note: *If the task has a billable contact or* ***Billed By*** *assignee, and that person has a specified rate entered, TeamConnect automatically displays that rate here. For more information on contacts and rates, see Setting Contact Rates.*
***Subject**	A brief description of the task used as a task name.
Units	The number of units (for example, hours or items) required to complete the task. Only applies to billable tasks.

1.6.2.9.2 Editing Multiple Tasks

The Task Entry Tool provides a convenient way to edit multiple tasks quickly in one TeamConnect page.

To edit multiple tasks

1. Click **Task Entry Tool** in the toolbar of the **Task** List or **General** page.

   The **Task Entry Tool** page opens.

2. Click on the right, next to the appropriate task in the List pane.

   The field entries for the task appear in the **Task** pane.

3. Edit and enter information in the **Task** pane according to descriptions listed under Task Entry Tool Field Definitions.

   When you are editing a task, the **Add** and **Clear** buttons change to **Ok** and **Cancel**.

4. Click **Cancel** to discard all your edits, if necessary.

5. Click **Ok** to save your edits in the task.

6. Click to create and save additional copies of the current task, if necessary.

   Each copied task appears in the List pane.

1.6.2.9.3 Posting Multiple Tasks

The Task Entry Tool provides a convenient way to post multiple tasks quickly in one TeamConnect page.

To post tasks

1. Click **Task Entry Tool** in the toolbar of the **Task** List or **General** page.

   The **Task Entry Tool** page opens.

2. Select the check-boxes in the List pane on the left, next to the tasks you want to post, or to post all tasks, click the check-box at the top of the list.
3. Click **Post**.

   Any corresponding account transactions display on the **Transactions** pages of the tasks and any associated account.

Note: *You may not edit or delete a posted task. If you want to void a task, you must view the task using the* ***General*** *page then void the task from there.*

1.6.2.9.4 Deleting Multiple Tasks

The Task Entry Tool provides a convenient way to delete multiple tasks quickly in one TeamConnect page.

To delete tasks

1. Click **Task Entry Tool** in the toolbar of the **Task** List or **General** page.

   The **Task Entry Tool** page opens.
2. Select the check-boxes in the List pane on the left, next to the tasks you want to delete, or to delete all tasks, click the check-box at the top of the list.
3. Click **Remove**.

1.7 Finance

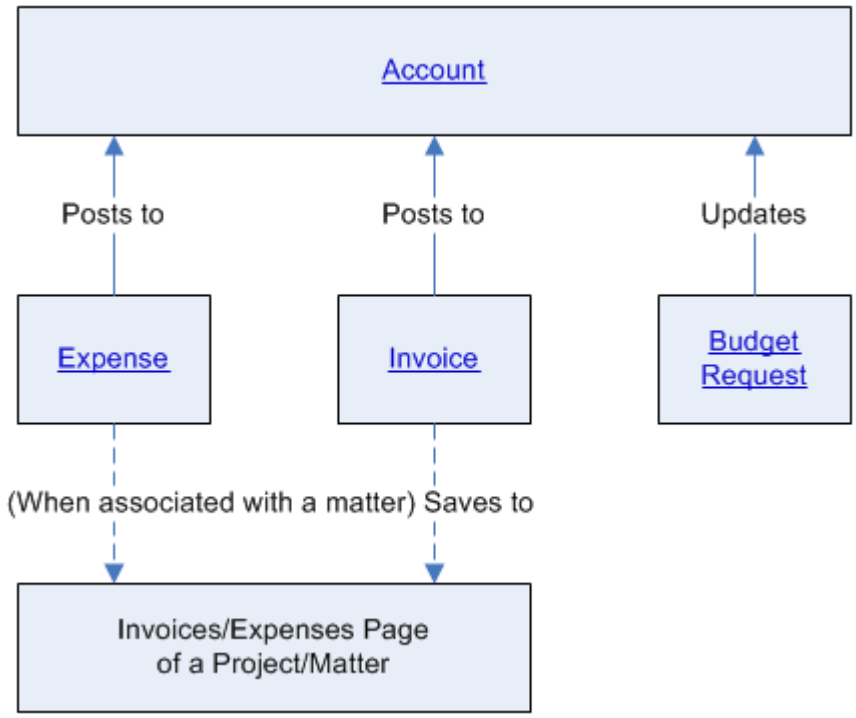
TeamConnect can track various financial components of a project, such as attorney time and vendor bills (Invoices) and internal business costs (Expenses). You must set the appropriate budgets and reserves (Accounts) to use invoices and expenses.

Accounts play a central role in the TeamConnect finance area. Each account can track transactions according to the desired posting criteria, which can be a combination of projects, vendors, involved contacts, and types of transactions.

If you have e-billing through Collaborati Spend Management (CSM), you can also use budget requests. Through Collaborati, vendors approve budgets for a matter.

Note: *The finance area in TeamConnect can track financial transactions electronically but is not tied to real monetary accounts.*

The following diagram illustrates how all the financial parts of TeamConnect work together. Click areas of this flowchart for more information.



- Before you can post expenses or invoices, you need to create an account to track transactions.
- In addition to posting to accounts, expenses and invoices save to the Invoices/ Expenses page of a matter when you associate them with a matter.
- If you use CSM, you can submit a budget request for each combination of a vendor and a matter. After you submit a budget request and the vendor approves it, the accounts listed on the budget update the Total Allocated amount for the account.

Note: *The pages where financial information save depend on your system configuration.*

Tasks

Tasks are a type of transaction that can also post to designated accounts. For more information, see Tasks.

1.7.1 Accounts

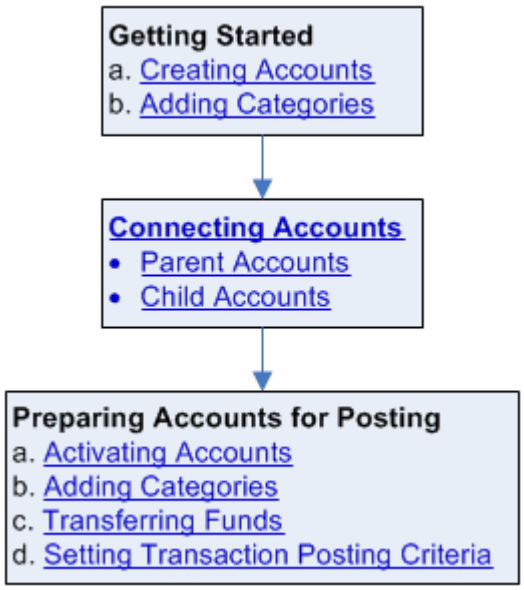
Accounts in TeamConnect let you electronically track posted transactions, such as expenses, tasks, and invoices. By default, TeamConnect accounts are not tied to actual monetary accounts or billing systems and are provided for record-keeping purposes. There are two types of accounts:

- **Budget**—An amount of money set aside by the organization or its individual departments to do business for a specific period of time, such as the fiscal year.

- **Reserve**—Money allocated from the budget for the settlement of matters, such as paying outside counsel fees and other costs.

All transactions (tasks, expenses, invoices) can be posted to their designated accounts. Each account can be set to track transactions according to the desired posting criteria, such as a combination of projects, vendors, involved contacts, or types of transactions. If an invoice posts to an account, the **Transactions** page of both the account and invoice displays the monetary amounts that are debited or credited to the account as a result.

The following flowchart illustrates how you can use accounts. Click areas of this flowchart for more information.



Account Record Pages

There are four account-specific pages:

- The **General** page lets you enter information about the account. In addition, you can deposit funds, withdraw funds, or transfer funds.
- The **Transactions** page displays a history of the account's posting and voiding status.
- The **Posting Criteria** page lets you set criteria for transactions that can post to the account, such as expenses, tasks, invoice expenses, or invoice tasks.
- The **Child Accounts** page displays an account's related child accounts.

1.7.1.1 Viewing Accounts

You can view accounts by browsing Account collections or using the search feature to locate an account.

See Viewing Collections of Records and Searching for Specific Records.

To view accounts

1. Click the **Finance** tab.
2. Click the **Accounts** link under the tab bar.

   The recently viewed accounts are listed in the right pane. To open an account record, click an account link in the **Name** column.

For information about the areas in the Accounts List page, see User Interface.

1.7.1.2 Creating or Editing an Account

You can create an account manually using a blank account record or a wizard that guides you through the process step-by-step. You can also create an account record by using an existing account record as a template.

There are several locations where you can add new Account records:

- From the **Accounts** list by clicking the **New** button.
- From an existing account's **Child Accounts** page.

After creating an account you must activate the account. Afterward, you can deposit funds, transfer funds, and set transaction posting criteria.

Using a Wizard

Your system administrator may provide one or more wizards to help you create new accounts. A wizard may be one of the available options or the only option.

If a wizard is your only option, when you click **New** the wizard opens. Complete the required fields on each page, and then click **Next** to progress to the end of the wizard. When you click **Finish** at the end of the wizard, the record is available in the appropriate list view and collection. See Viewing Accounts for more information.

Note: *If a wizard is your only option, and you want to use an existing account record to create a new account record, a wizard will not open. A blank account record opens and you can complete the fields manually. See Copying a Record and Creating or Editing an Account Manually for more information.*

1.7.1.2.1 Creating or Editing an Account Manually

Use the account **General** page to begin manually creating an account record. Once you save the record, you can edit it at any time.

Note: *Your company may allow you to create an account using a wizard only, so the option to create an account manually may not be available. See Using a Wizard for more information.*

To create or edit an account manually

1. Click the **Finance** tab.

2. Click the **Accounts** link under the tab bar.
3. Select one of the following options:
   - To create an account, click New.
   - To edit an account, click the Edit Record icon to the left of an account.
4. From the **General** page, the following fields in the **Account Information** section are required:
   - **Name—Enter** a name for the account.
   - **Account Period Begins**—Click the **Calendar** icon to select the start date.
   - **Account Period Ends**—Click the **Calendar** icon to select the end date.

     Transactions can post to the account only between the **Account Period** start and end dates.
   - **Allocation Limit**—Enter the maximum amount of money that can be allocated (deposited or transferred) to the account. If you do not want an account to have an allocation limit, set the Allocation Limit to zero ($0.00).
5. (optional) To enter information in fields that have been created for your company:
   - Click the **Categories** link in the left pane.

     The **Categories** page opens. Select the category to add (enable).
   - Click the **General** link in the left pane.

     A section displays below **Notes**. Enter the appropriate information in the corresponding fields.
6. For additional field descriptions, see Account General Page Field Descriptions.
7. For information about adding categories and details, see Adding or Removing Categories from an Account.
8. For information about setting posting criteria, see Setting Transaction Posting Criteria.
9. For information about adding child accounts, see Viewing or Creating Child Accounts.
10. Select a save option.

    After saving an account, click **Activate** to add funds to the account.

Account General Page Field Descriptions

Some field descriptions that follow may not display based on system settings and your assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Account Information Section Field Descriptions

Field	Description

(*=required)	
***Account Period Begins**	The start of the date range during which transactions can be posted against the account. ***Note:** Transactions can only post to the account between the **Account Period Begins** and **Account Period Ends** date range.*
***Account Period Ends**	The end of the date range during which transactions can be posted against the account. ***Note:** Transactions can only post to the account between the **Account Period Begins** and **Account Period Ends** date range.*
Account Type	Can be one of the following: • **Budget**—An amount of money set aside by the organization or its individual departments to do business for a specific period of time, such as the fiscal year. • **Reserve**—Money allocated from the budget for the settlement of matters, such as paying the outside counsel fees and other costs.
Active	Can be one of the following: • **Yes**—Indicates that the account has been activated. An account must be activated before you can add funds to, subtract funds from, or transfer funds between this account and another account. • **No**—Indicates that the account has not been activated or has been inactivated.
***Allocation Limit**	The maximum amount of money that can be allocated (deposited or transferred) to the account. The amount sets a cap for the **Total Allocated**. If you do not want an account to have a limit, set the **Allocation Limit** to zero ($0.00).
Allow Posting	If checked, expenses, tasks, or invoices can post against the account record according to the criteria specified on the **Posting Criteria** tab. See Setting Transaction Posting Criteria.
***Name**	The account name.
Notes	Comments for the account.
Overdraft Type	One of the following:

	• **Do not allow negative account—**No transactions will be posted if the account balance will be negative. If you select this option, make sure to deposit enough funds to the account to post transactions. Keep in mind, you can only deposit funds up to your Allocation Limit. • **Allow negative account**—Transactions can still be posted even if the account balance is or will be in the negative. • **Automatic overdraft protection**—Available only when you have a parent account. The necessary funds will be automatically transferred from the parent account to the child account so that transactions continue to be posted. ***Note:*** *The action selected in the* ***Overdraft Type*** *takes effect based on the amount in the* ***Balance*** *field.*
Parent Account	The parent account. ***Note:*** *Required when the Automatic overdraft protection option is selected for the Overdraft Type. See also Parent and Child Accounts.*
Total Accruals	The sum of all of the transaction amounts created when you post an Accrual invoice.

Account Summary Section Field Descriptions

Field	Description
Add	Click to deposit funds to the account. See Account Add Funds Screen Field Descriptions for field descriptions on the resulting screen.
Balance	The difference between the **Total Allocated** amount and the **Total Used** amount: **Balance = Total Allocated - Total Used**
Subtract	Click to withdraw funds from the account. See Account Subtract Funds Screen Field Descriptions for field descriptions on the resulting screen.
Total Allocated	The sum of all deposited, transferred funds, and automatic overdrafts from the parent account. The respective activity details are displayed on the **Transactions** tab.

	Important: *The* ***Total Allocated*** *cannot exceed the* ***Allocation Limit****.*
Total Used	The total amount of transactions posted, withdrawn, or transferred from the account record.
Transfer From	Click to transfer funds from another account to the current account. ***Note:*** *You can transfer between parent and child accounts only.*
Transfer To	Click to transfer funds from the current account to another account. ***Note:*** *You can transfer between parent and child accounts only.*

Account Add Funds Screen Field Descriptions

Field (*=required)	Description
***Amount**	The numeric **Amount** to deposit.
Balance	The difference between the **Total Allocated** amount and the **Total Used** amount: **Balance = Total Allocated - Total Used**
Description	Notes about the transaction.

Account Subtract Funds Screen Field Descriptions

Field (*=required)	Description
***Amount (-)**	The numeric **Amount** to withdraw.
Balance	The difference between the **Total Allocated** amount and the **Total Used** amount: **Balance = Total Allocated - Total Used**
Description	Notes about the transaction.

Account Notes Section Field Description

Field	Description
Notes	Comments for the account. ***Note:*** *If you enter more than 250 characters without any spaces, you will need to scroll horizontally on the record to view all sections.*

Account Access Information Section Field Descriptions

Field	Description
Created By	The name of the user who created the account.
Created On	The date that the account was added to TeamConnect.
Modified By	The name of the user who last modified the account.
Modified On	The date on which the account was modified.

1.7.1.2.2 Creating a Shadow Invoice Account

A shadow invoice is an invoice that tracks all fees but does not reflect what you actually pay. In order to post shadow invoices to an account, another account must already exist with the same category and posting criteria as the shadow invoice. Most of the time, this account already exists and you do not need to create one.

To find out if a shadow invoice account already exists for this fiscal period, run a custom search from the **Accounts** page. Under the **Filter Criteria**, select **Account Category** as the **Field**, **Is** as the **Operator**, and **Shadow Invoice** as the **Value**. Include **Account Period Begins** and **Account Period Ends** as the **Results Display** fields to determine the fiscal periods of any existing records.

If there is no shadow invoice account for the appropriate fiscal period, you can create the account manually using the **Accounts** pages.

To create a shadow invoice account manually

1. From the **Finance** tab, click **Accounts**.
2. Click the **New** button to create an account record.
3. From the **General** page, enter or select the following values:
   - **Name**: Shadow Invoice
   - **Account Type**: Budget
   - **Account Period Begins/Ends**: [your fiscal period start date] and [your fiscal period end date]

- **Overdraft Type**: Allow negative account
- **Allow Posting**: checkbox selected

4. From the **Categories** page, select **Shadow Invoice** as the primary category.
5. Save the account.
6. From the open account click the **Activate** button.
7. From the **Posting Criteria** page, click **Edit** and enter or select the following values:
   - **Post Invoice Type**: Shadow Invoice
   - **Post Invoice Tasks to this Account**: checkbox selected
   - **Post Invoice Tasks of Type**: (ANY)
   - **Invoice Task Percent**: 100%
   - **Post Invoice Expenses to this Account**: checkbox selected
   - **Post Invoice Expenses of Type**: (ANY)
   - **Invoice Expense Percent**: 100%
8. Save the account.

Note: *If you change your preferences from budgeting by fiscal period to budgeting without a fiscal period, a shadow invoice might post to two accounts rather than one. In this case, manually deactivate the original shadow invoice account (the one that budgets by fiscal period).*

1.7.1.3 Adding or Removing Categories from an Account

Categories organize similar types of accounts or act like filters that display or hide custom fields related to an account.

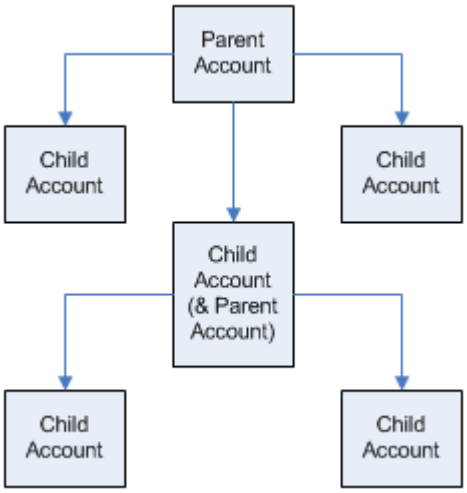
Depending on the type of account you are creating or editing, you might add a category that results in the display of related custom fields. Afterward, you can enter information in those custom fields.

After you add a category on an account's **Categories** page, you can click the **General** link in the left pane and find a **Details** section for that category's custom fields. For example, if you added a category called **Department**, then the **General** page would be updated to include a **Department Details** section with related custom fields.

Similarly, if you remove a category from an account, the related custom field(s) will no longer display. For more information, see Setting Category Details.

1.7.1.4 Parent and Child Accounts

Accounts can be independent or related through a parent-child relationship. Each parent account can have several child accounts, but each child account can have only one parent account. A child account can also be a parent for other accounts. The following flowchart illustrates the parent-child relationship.



Parent accounts are often set to protect their child accounts when there are insufficient funds in the child accounts to cover transactions. You can set up child accounts with **Automatic overdraft protection**, enabling automatic withdrawal of funds from its parent account to avoid a negative balance.

Take into consideration the following when working with parent and child accounts:

- You cannot deposit funds directly to child accounts.
- You can transfer funds from a parent account to a child account, or transfer funds from a child account to a parent account.
- If you deactivate a parent account, make sure to change the **Overdraft Type** of the child accounts' **General** page.
- The parent account must be able to support its child (children), by either having enough funds (**Total Allocated**), high or unlimited **Allocation Limit**, or it must be set up to allow for a negative balance (**Overdraft Type** = **Allow negative account**).
- From a parent account, you can only create new accounts from the Child Accounts page. To add child accounts that are already existing, open the child account and select the desired parent account.

1.7.1.4.1 Assigning Parent Accounts

On the **General** page, you can assign a parent account to an existing account. For more information, see Parent and Child Accounts.

To assign a parent account to an existing account

1. Search for an account that will be the child account and open it.
2. On the **General** page, **Parent Account** field, click the **Search Accounts** icon. Search and select a parent account.
3. Select a save option.

1.7.1.4.2 Viewing or Creating Child Accounts

On an account's **Child Accounts** page, you can view its existing child accounts or create a new account and set it as a child account of the original account. For more information, see Parent and Child Accounts.

To view or create a child account

1. Search for an account that will be the parent account and open it.
2. Click **Child Accounts** in the left pane.
3. Select one of the following options:
   - To view existing child accounts either browse the table or click an account name link to open the child account record.
   - To create a child account, click **New Child Account**.

     A new **Account** record is displayed with the original account's name displayed in the **Parent Account** field.
4. Enter account information as described in Creating or Editing an Account.
5. Select a save option.

The newly created account is displayed as a child account on the **Child Accounts** screen of the originally selected account. The original account is set as the parent account for the newly created child account.

1.7.1.5 Activating or Deactivating Accounts

Use the **General** page to activate an existing account. If you are creating an account, you need to save and then activate the account before any transactions can be posted to the account. You must also activate the account before depositing funds or transferring funds between this account and another account. You can also deactivate an account, preventing future transactions from posting to the account.

To activate an account

1. Search for an account and open it.
2. From the **General** page, click **Activate**.

To deactivate an account

1. Search for an account and open it.
2. From the **General** page, click **Deactivate**.

Activation for Budget Requests

If you are using the Budget Request feature in Collaborati Spend Management, you must pay special attention to the sequence of activating accounts. The specific event that generates an automatic budget request is the activation of child accounts within a matter. For this reason, you must insure that all other conditions for budget requests have been met before you activate a child account.

The full set of conditions required for automatic generation of budget requests is described in the *CSM Administration Guide*.

1.7.1.6 Adding and Subtracting Funds

The ability to add and subtract funds from an account depends on:

- Whether the account is independent or has a parent-child relationship--You can add funds to a parent account but not to a child account. You can transfer funds from the parent account to its child accounts. You can also transfer funds between child accounts that share the same parent account.
- The account's **Overdraft Type** setting on the **General** page:
  - If **Do not allow negative account** is selected--Prevents subtracting an amount greater than the current balance.
  - If **Allow negative account** is selected--No restriction on subtracting from the account.
  - If **Automatic overdraft protection** is selected--Allows subtracting an amount covered by the parent account's balance.

To add or subtract funds to an account

1. Search for an account and open it.
2. Verify that the account has been activated. If an **Activate** button appears, click **Activate**. If a **Deactivate** button appears, the account is already active.
3. Select one of the following options:
   - **Add funds to the account:**
     i. In the **Account Summary** section, click the **Add** link.
     ii. On the **Add Funds** screen, enter the numeric **Amount** to amount.
     iii. Click **Add**.
   - Subtract funds from the account:
     i. In the **Account Summary** section, click the **Subtract** link.
     ii. On the **Subtract Funds** screen, enter the numeric **Amount** to subtract. For example, to subtract $2,500, enter 2500.
     iii. Click **Subtract**.

1.7.1.7 Transferring Funds Between Accounts

You can only transfer funds between accounts that have parent-child relationships. For example, you can transfer funds from a parent account to its child accounts. You can also transfer funds from a child account to its parent account.

To transfer funds between accounts

1. Search for an account and open it.
2. Click the **Account Summary** page.
3. Complete the following steps, depending on whether you are transferring funds to or from accounts:
   - **To transfer funds from the current account to another account**
     a. Click **Transfer To**.
     b. On the **Transfer Funds** page, click the Search Accounts icon next to the **To** field to search and select an account.
   - **To transfer funds from another account to the current account**
     a. Click **Transfer From**.
     b. On the **Transfer Funds** page, click the Search Accounts icon next to the **From** field to search for, and then select an account.
4. Enter the numeric value to transfer in the **Amount** field.
5. Click **Transfer**.

Account Transfer Funds Screens Field Descriptions

Some field descriptions that follow may not display based on system settings and your assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Account - Transfer Funds To Screen Field Descriptions

Field (*=required)	Description
***Amount**	The numeric value to transfer.
Description	Notes about the transaction.
From	The current account name.
***To**	The account to which to transfer funds.

	Click the Find icon to search and select an account to transfer funds to.

Account - Transfer Funds From Screen Field Descriptions

Field (*=required)	Description
***Amount**	The numeric value to transfer.
Description	Notes about the transaction.
***From**	The account to transfer funds from.
To	The current account name.

1.7.1.8 Setting Transaction Posting Criteria

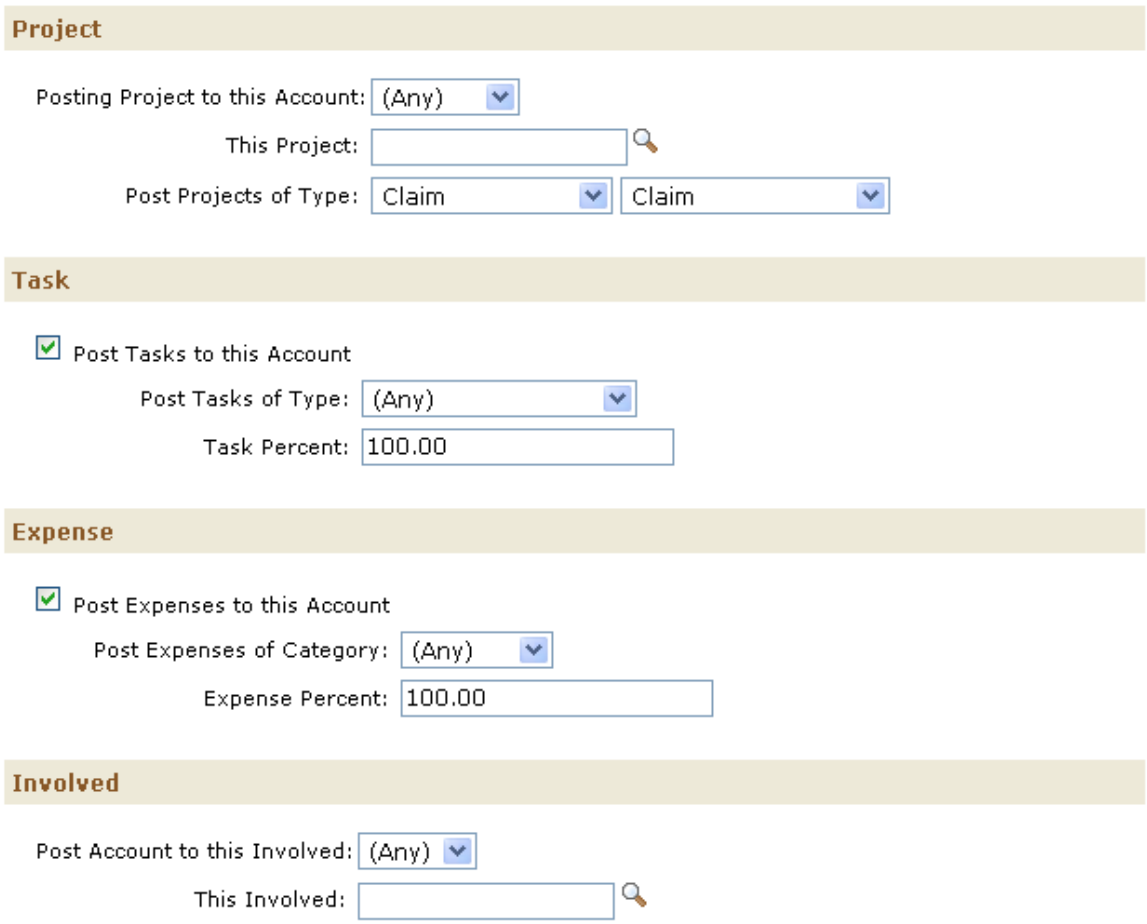
Use the **Posting Criteria** page to define conditions under which transactions (expenses, tasks, invoice line items) can be posted to the account. Before a transaction is posted to an account, it is compared to the Posting Criteria. You must enable posting tasks, expenses, or invoices to an account on the **Posting Criteria** page before you can post a transaction.

The following procedures are described below:

You can perform one or more of the following procedures per account.

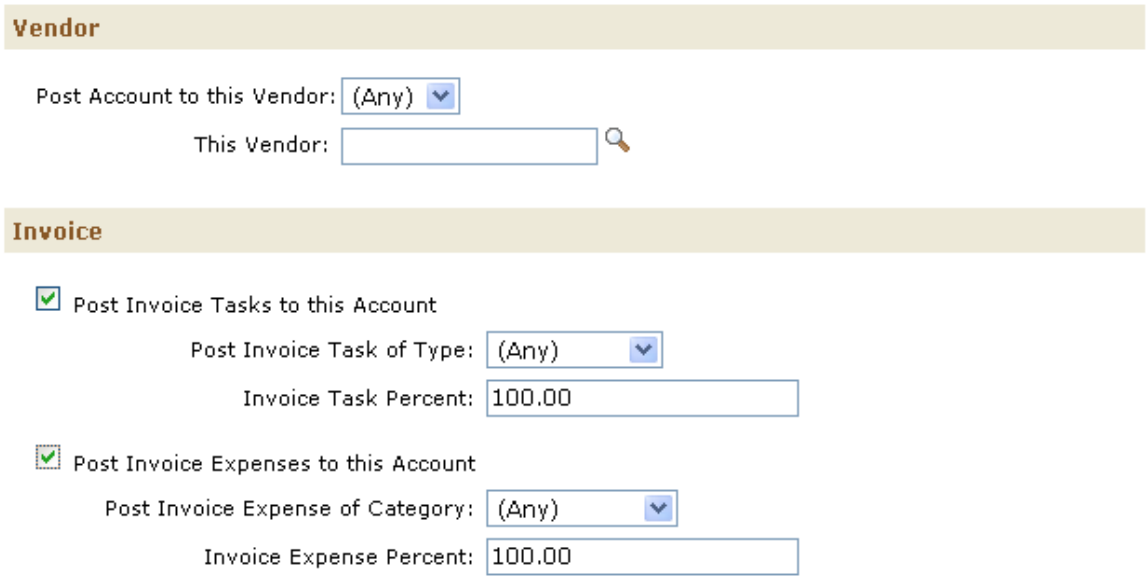
- To set transaction posting criteria for tasks
- To set transaction posting criteria for expenses
- To set transaction posting criteria for invoice line items
- To post matter-level taxes to accounts

The following screenshot shows general groupings of transaction posting criteria for posting tasks or expenses.



Account Posting Criteria Page Excerpt (Task and Expense Posting Criteria)

The following screenshot shows general groupings of transaction posting criteria for posting invoice line items (expense or task type). Although the Projects section is not shown below, you can also add additional posting criteria for an invoice line item's associated project.



Account Posting Criteria Page Excerpt (Invoice Line Item Posting Criteria)

Tips

- If you allow tasks and/or expenses to post to an account, you can also specify additional posting criteria by the associated project and/or task contact or expense contact.
- If you allow invoice tasks and/or invoice expenses to post to an account, you also can specify additional posting criteria by the associated project and by vendor contact. For invoice line items, you can also restrict posting by line item task type (category), line item expense type (category), and by timekeeper.
- If you allow posting by more than one transaction type (for example, if you select **Post Tasks to this Account** and also select **Post Expenses to this Account**), then any posting criteria you specify under the **Project** section or **This Involved** section will apply to all allowed transactions. For example, if you specify posting criteria to transactions associated with a specific project, then only tasks associated with that project or expenses associated with the same project will be able to post.

To set transaction posting criteria for tasks

1. Search for an account and open it.
2. Click **Edit** on the toolbar or click the **Edit** link in the section that you want to update.
3. Click **Posting Criteria** in the left pane.
4. To allow Tasks to post to this account, in the **Task** section, select the **Post Tasks to this Account** check-box.

   This allows all tasks to post to the current account.
5. Specify how tasks can post to the account in one or more of the following ways:

- By a task category—In the **Task** section, select a category from the **Post Tasks of Type** drop-down list.
- By a percent amount of the task—Type a numeric percent value in the **Task Percent** field. For example, if you enter 10 and the task total is $70, then 10% of $70 (or $7) will post to the account.
- By a task contact—In the **Involved** section, for the **Post Account to this Involved** drop-down list, select **One**. Click the Search Contacts icon next to the **This Involved** field to search and select a contact.
- By an associated project—In the **Project** section, for the **Post Project to this Account** drop-down list, select **One**. Click the Search Projects icon next to the **This Project** field to search and select a project.
- By an associated project category—In the **Project** section, for the **Post Project to this Account** drop-down list, select **By Type**. In the **Post Projects of Type** field, select the custom record type (for example, Project). Also select the project category to restrict transactions to.

6. Select a save option.

Any posting criteria selected under the Project or Involved sections would also apply to posting expenses or invoice line items.

To set transaction posting criteria for expenses

1. Search for an account and open it.
2. Click **Edit** on the toolbar or click the **Edit** link in the section that you want to update.
3. Click **Posting Criteria** in the left pane.
4. To allow expenses to post to this account, in the **Expense** section, select the **Post Expenses to this Account** check-box.

   This allows all expenses to post to the current account.
5. Specify how expenses can post to the account in one or more of the following ways:
   - By an expense category—Select a category in the **Post Expenses of Category** drop-down list.
   - By a percent amount of an expense—Type a numeric percent value in the **Expense Percent** field. For example, if you enter 10 and the expense total is $70, then 10% of $70 (or $7) will post to the account.
   - By an expense contact—In the **Involved** section, for the **Post Account to this Involved** drop-down list, select **One**. Click the Search Contacts icon next to the **This Involved** field to search and select a contact.
   - By an associated project—In the **Project** section, for the **Post Project to this Account** drop-down list, select **One**. Click the Search Contacts icon next to the **This Project** field to search and select a project.

- By an associated project category—In the **Project** section, for the **Post Project to this Account** drop-down list, select **Type**. In the **Post Projects of Type** field, select the custom record type (for example, Project). Also select the project category to restrict transactions to.

6. Select a save option.

Any posting criteria selected under the Project or Involved sections would also apply to posting tasks or invoice line items.

To set transaction posting criteria for invoice line items

1. Search for an account and open it.
2. Click **Edit** on the toolbar or click the **Edit** link in the section that you want to update.
3. Click **Posting Criteria** in the left pane.
4. To specify the types of invoices that can post to the account, in the **Invoice** section, select one or more checkboxes in the **Post Invoice Type** fields. The options that you select are the only type(s) of invoices that will post to this account. Options are **Standard**, **Accrual**, **Shadow**, or **Credit Note**. See Account Invoice Section Field Descriptions for more information.

   Important: *If you do not select an option in the **Post Invoice Type** area, nothing will post to this account, regardless of the other options that you select on this page.*

   There are special considerations for posting Shadow Invoices:

   - An account that allows Shadow Invoices to post cannot have a parent account, or child account, that does not allow Shadow Invoices to post. In other words, the treatment of Shadow Invoices must be consistent throughout a parent-child hierarchy.
   - An account that has not had any invoices posted to it is eligible to have Shadow Invoices posted to it. However, once an invoice that is not a Shadow Invoice has been posted to that account, Shadow Invoices can no longer be posted to it. Conversely, if a Shadow Invoice is the first invoice posted to an account, thereafter no other invoice type will be allowed to post to that account.

5. To allow invoice task/fee line items to post to this account, in the **Invoice** section, select the **Post Invoice Tasks to this Account** check-box.

   This allows all invoice task/fee line items to post to the current account.

6. Specify how invoice task/fee line items can post to the account in one or more of the following ways:

   - By a task category—Select a category in the **Post Invoice Task of Type** drop-down list.
   - By a percent amount of an invoice task line item—Type a numeric percent value in the **Invoice Task Percent** field. For example, if you enter 10 and the task total is $70, then 10% of $70 ($7) will post to the account.

- By an associated project—In the **Project** section, for the **Posting Project to this Account** drop-down list, select **One**. Click the Search Projects icon next to the **This Project** field to search and select a project.
- By an invoice vendor—In the **Vendor** section, for the **Post Account to this Vendor** drop-down list, select **One**. Click the Search Contacts icon next to the **This Vendor** field to search and select a contact.
- By an invoice line item timekeeper—In the **Involved** section, for the **Post Account to this Involved** drop-down list, select **One**. Click the Search Contacts icon next to the **This Involved** field to search and select a contact.

7. To allow Invoice expense line items to post to this account, in the Invoice section, select the **Post Invoice Expenses to this Account** check-box.

   This allows all expense line items to post to the current account.

8. Specify how invoice expense line items can post to the account in one or more of the following ways:
   - By an expense category—Select a category in the **Post Invoice Expense of Category** drop-down list.
   - By a percent amount of an invoice expense line item—Type a numeric percent value in the **Invoice Expense Percent** field. For example, if you enter 10 and the expense total is $70, then 10% of $70 (or $7) will post to the account.
   - By an associated project—In the **Project** section, for the **Posting Project to this Account** drop-down list, select **One**. Click the Search Projects icon next to the **This Project** field to search and select a project.
   - By an invoice vendor—In the **Vendor** section, for the **Post Account to this Vendor** drop-down list, select One. Click the Search Contacts icon next to the **This Vendor** field to search and select a contact.
   - By an invoice line item timekeeper—In the **Involved** section, **Post Account to this Involved** drop-down list, select **One**. Click the Search Contacts icon next to the **This Involved** field to search and select a contact.
9. Select a save option.

   Any posting criteria selected under the Project or Involved sections would also apply to posting tasks or expenses.

To set transaction posting criteria for non-US tax accounts

1. Search for an account and open it.
2. Click **Edit** from the toolbar or click the **Edit** link for the section to update.
3. Click **Posting Criteria** from the left pane.
4. Click the **Post Non-US Tax to this Account** to allow non-US Tax categories to post to the account.

5. In the **Post Non-US Tax of Type** field, select the non-US Tax categories that are allowed to post to this account. Once you select a category, the category and all of its child categories are allowed for this account.
6. In the **Non-US Tax Percent** field, enter the percentage of the tax amount that will post to the account.
7. Select a save option.

To post matter-level taxes to accounts

Note: *If an invoice uploaded from Collaborati has matter-level taxes, you must use these steps to post the invoice to an account.*

1. Search for an account and open it.
2. Click **Edit** on the toolbar.
3. Click **Posting Criteria** on the left pane.
4. Depending on whether you need to post fee or expense taxes, place a checkmark in the **Post total matter fee tax to this account** or the Post **total matter expense tax to this account** check-boxes.
5. Select a save option.

To allow accounts to be associated with budget requests

1. Search for an account and open it.
2. Click **Edit** on the toolbar.
3. Click **Posting Criteria** on the left pane.
4. From **Posting Project to this Account**, select **One**.
5. From **This Project**, select the matter or project you want to associate with this account.
6. From **This Vendor**, select the vendor you want to associate with this account. The vendor you select must be an involved party of the project you select in the previous step.

   When you create the budget request, you must specify the same project and vendor for the budget request that you specified for the account. See Creating a Budget Request for more information.
7. Specify whether you want to post invoice tasks or expenses to this account by placing a check-mark in one or both of the following check-boxes:
   - **Post Invoice Tasks to this Account**
   - **Post Invoice Expenses to this Account**
8. Save the account.

Note: *The account must be current for you to associate a budget request with the account. You must also activate the account after you create the budget request. See Activating or Deactivating Accounts for more information.*

Account Posting Criteria Page Field Descriptions

Some field descriptions that follow may or may not display based on system settings and your assigned rights. The following tables provide field descriptions for the Posting Criteria page. The field descriptions are in the order that they appear on the screen. The field descriptions for the Projects, Involved, and Vendor sections are at the bottom of the topic because they are used as secondary filters to the posting criteria for expenses, tasks, and invoice line items (expense and fee).

Account Task Section Field Descriptions

Field	Description
Post Tasks to this Account	If this check-box is selected, tasks will automatically post against the account. ***Note:*** *If the check-box is cleared, disregard the other two fields in this section.*
Post Tasks of Type	The task category used as criteria for posting a task to this account. You can select a specific category or select **Any**. Once you select a category, the category and all of its child categories are allowed for this account.
Task Percent	The percent amount of a task that can post to this account.

Account Expense Section Field Descriptions

Field	Description
Post Expenses to this Account	If this check-box is selected, expenses will automatically post against the account. ***Note:*** *If the check-box is cleared, disregard the other fields in this section.*
Post Expenses of Category	The expense category used as criteria for posting an expense to this account.
Expense Percent	The percent amount of an expense that can post to this account.

Account Project Section Field Descriptions

Field	Description
Post Project to this Account	Can be one of the following: • **Any**—(default) Indicates that there is no restriction for transactions posting to the account based on the associated project. If you select this option, you can leave the other two fields in this section blank. • **One**—Allows you to specify a single project whose associated transactions can be posted against the account. If you select this option, specify This Project field value below. • **By Type**—Allows you to specify the project type (category) whose associated transactions can be posted against the account. If you select this option, specify the **Post Projects of Type** field value below.
This Project	***Important:*** *Required if the* ***Post Project to this Account*** *drop-down lists's option,* ***One****, is selected.* The project used as criteria for posting a transaction to this account. Only transactions associated with the project can post against the account. Also the project's Accounts page displays a link to the account.
Post Projects of Type	***Important:*** *Required if the* ***Post Project to this Account*** *drop-down lists's option,* ***By Type****, is selected.* The project category used as criteria for posting a transaction to this account. Only transactions associated with projects that have this category type enabled can post against the account. You can select a specific category or select **Any**. Once you select a category, the category and all of its child categories are allowed for this project.

Account Involved Section Field Descriptions

Field	Description
Post Account to	Can be one of the following: • **Any**—(default) Indicates that there is no restriction for tasks or expenses posting to the account based on the associated **Contact**.

	If you select this option, you can leave the other field in this section blank. • **One**—Allows you to specify the contact associated with tasks or expenses that can post against the account. If you select this option, specify the **This Involved** field value below.
This Involved	***Important:*** *Required if the* ***Post Account to*** *drop-down lists's option,* ***One****, is selected.* Find and select the desired contact. Afterward, only tasks or expenses where this contact is specified in the **General** page, **Contact** field, can post against the account.

Account Vendor Section Field Descriptions

Field	Description
Post Account to	Can be one of the following: • **Any**—(default) Indicates that there is no restriction for invoice tasks or invoice expenses posting to the account based on the associated Vendor contact. If you select this option, you can leave the other field in this section blank. • **One**—Allows you to specify the Vendor contact associated with invoice tasks or invoice expenses that can post against the account. If you select this option, specify the **This Vendor** field value below.
This Vendor	***Important:*** *Required if the* ***Post Account to drop-down list's*** *option,* ***One****, is selected.* Find and select the desired vendor contact. Afterward, only invoice tasks or invoice expenses where this vendor is specified in the **General** page, **Vendor** field, can post against the account.

Account Invoice Section Field Descriptions

Field	Description
Post Invoice Type	The type of invoices that can post to this account. In addition to the typical **Standard** invoice, additional options are as follows: • **Credit Note**—A legal instrument that corrects a Non-US Tax invoice.

	• **Accrual**—An estimate of an upcoming bill. • **Shadow Invoice**—A detailed invoice of work performed that is not intended to be actually paid, because an alternate fee arrangement exists between client and vendor. The invoice is posted to allow the client to do financial analysis. If you do not select an option, no invoices will post to this account.
Post Invoice Tasks to this Account	If this check-box is selected, invoice task line items will automatically post against the account. ***Note:*** *If the check-box is cleared, disregard the following two fields in this section.*
Post Invoice Tasks of Type	The invoice line item task category used as criteria for posting an expense to this account. You can select a specific category or select **Any**. Once you select a category, the category and all of its child categories are allowed for this invoice.
Invoice Task Percent	The percent amount of an invoice task line item that can post to this account.
Post Invoice Expenses to this Account	If this check-box is selected, invoice expense line items will automatically post against the account. ***Note:*** *If the check-box is cleared, disregard the following two fields in this section.*
Post Invoice Expenses of Type	The invoice line item expense category used as criteria for posting an expense to this account.
Invoice Expenses Percent	The percent amount of an invoice task line item that can post to this account.

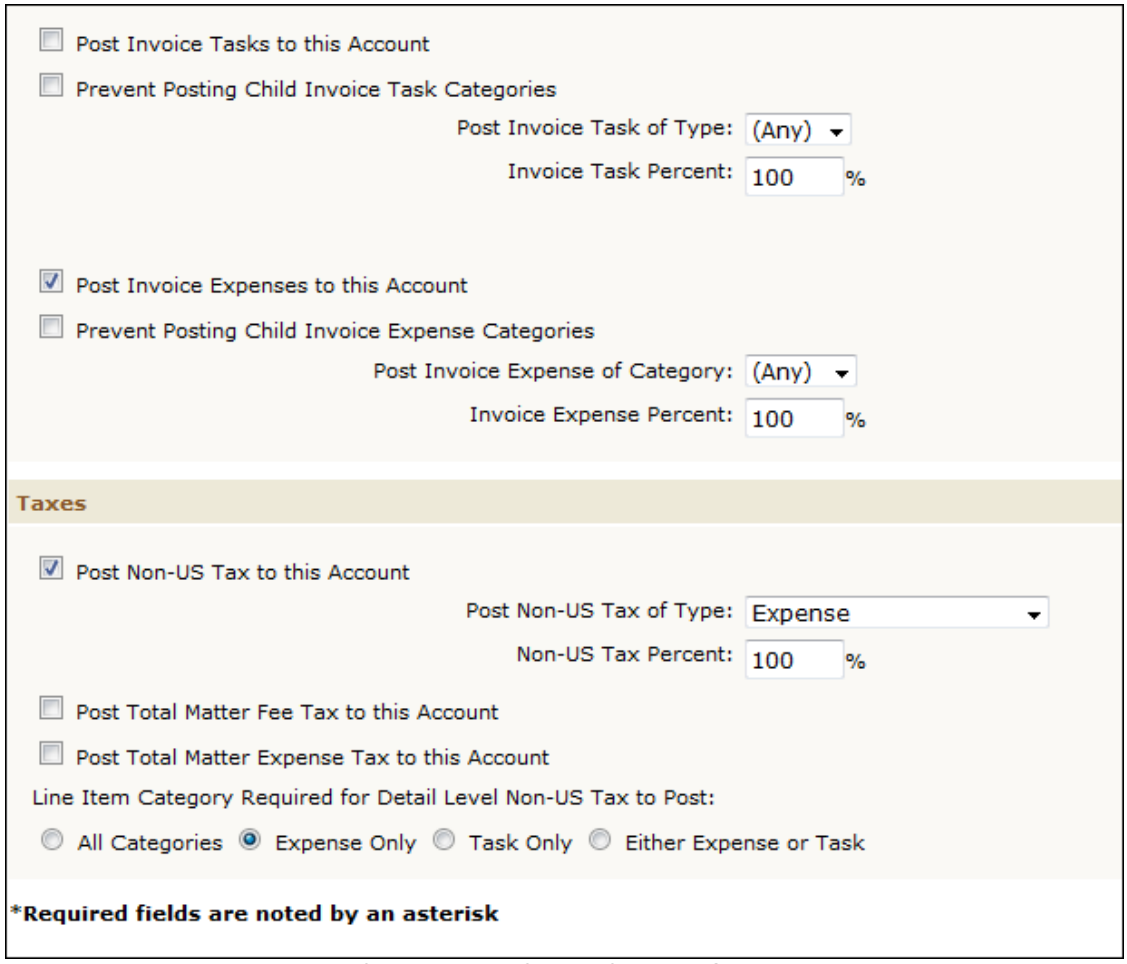
Account Taxes Section Field Descriptions

Field	Description
Post Non-US Tax to this Account	Check this check-box to automatically post non-US tax amounts against this account.

	***Note:** If the check-box has no checkmark, disregard the **Post Non-US Tax of Type** and **Non-US Tax Percent** fields.*
Post Non-US Tax of Type	Select a type of non-US tax amounts to this account. **Any** indicates no restriction on tax types.
Non-US Tax Percent	Enter the percent of the non-US tax amount that can post to this account.
Post total matter fee tax to this account	Check this check-box to automatically post matter-level fee taxes against this account. The tax amounts come from invoices uploaded from Collaborati.
Post total matter expense tax to this account	Check this check-box to automatically post matter-level expense taxes against this account. The tax amounts come from invoices uploaded from Collaborati.
Line Item Category Required for Detail Level Non-US Tax to Post	Select the desired radio button to refine the types of Non-US taxes that can be posted to the account. For more detail, see the section below on Refining Non-US Tax Posting. *Only available in TeamConnect 4.0.9+*

Refining Non-US Tax Posting

Beginning in TeamConnect 4.0.9, users are able to refine account posting criteria to ensure Non-US taxes are posting optimally and as intended. The radio buttons in the image below demonstrate the options available for ensuring what type of Non-US taxes are applied to invoices on this account.



Refining Posting Criteria for Non-US Taxes

Category Detail Option	Result
All Categories	The Non-US tax chosen to be applied will be applied to all categories on the invoice.
Expense Only	The Non-US tax on the invoice will be applied only to the invoice expense category.
Task Only	The Non-US tax on the invoice will be applied only to the invoice fee category.
Either Expense or Task	The Non-US tax on the invoice will be applied to the expense or fee (task) set for the invoice.

Note: *Bold items in the table above will be most useful to users with Financial Management. The All Categories option is best suited for users without Financial Management that utilize Non-US taxes on line items.*

1.7.1.9 Viewing Transactions History for an Account

Use the **Transactions** page to view all financial transactions for an account.

Transactions that are internal to the account include fund additions, fund subtractions, and transfer of funds.

Transactions that are triggered outside of the account can include posting and voiding expenses, posting and voiding tasks, and posting and voiding invoices. These externally triggered transactions are dependent on an account's **Posting Criteria** page settings. For more information, see Setting Transaction Posting Criteria.

Modifying Account Transactions

You cannot delete or modify account transactions from the **Transactions** page. If you need to change invoice, task, and expense transactions, you have to void each transaction, edit the respective record, and post the record again.

To change fund additions, subtractions, and transfers you must post reverse transactions. For example, if you added $150,000 to an account and then decide that only $75,000 should have been added, you can make the correction by subtracting $75,000 from the account.

To view transactions history for an account

1. Search for an account and open it.
2. Click **Transactions** from the left pane. For more information about fields, see the following table.

Account Transactions Page Field Descriptions

Field	Description
Search Transactions	Click this link to perform a search using multiple transaction field values as search criteria.
Date	Displays the date the transaction occurred.
Name	Displays the type and number of the record that was posted or voided. If applicable, the invoice type is in parenthesis next to the invoice name.
Vendor	Click the link to view the associated vendor's contact record.
Used For	Click the link to view the record that was posted or voided.
Debit	Displays the monetary amount that was debited from (posted against) the account.

Credit	Displays the monetary amount that was credited to (or voided from) the account.
Transactions per page	Determines the number of transactions that appear on each page. Click the drop-down arrow to change the number. ***Note:*** *To change the default number of records that display per list page across all record types, see Defining Search Result Settings.*

1.7.1.10 Viewing or Creating Account History

From the **History** page, you can add notes about changes made to an account.

For more information, see Working with Record History.

1.7.2 Expenses

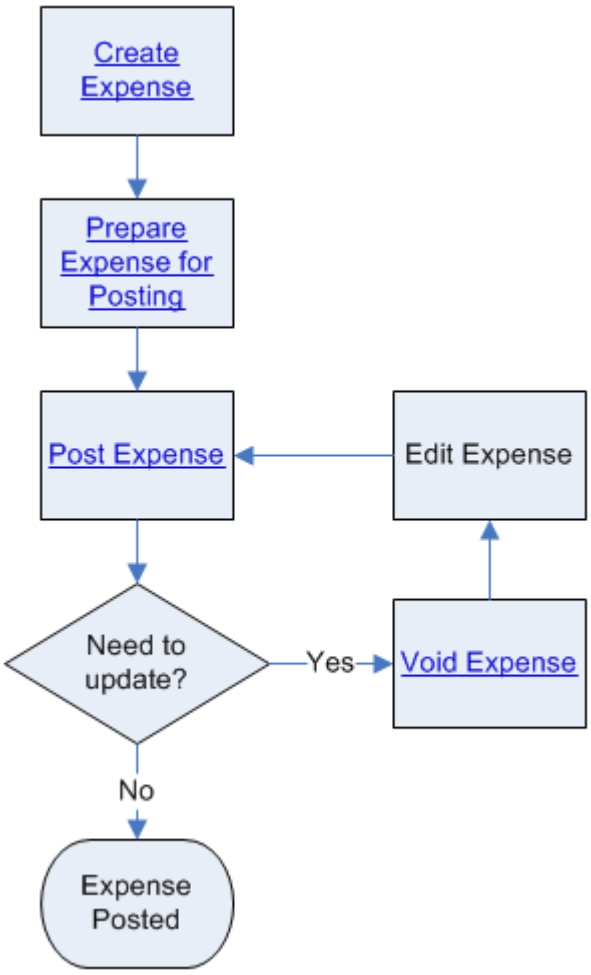
Expenses in TeamConnect are the internal costs of doing business at your organization. Typically, expenses include the cost of the merchandise bought and the cost of the services received, for example, office supplies, transportation, phone calls, and meals.

Two types of expenses exist:

- *Project-specific*—Associated with a particular project.
- *Global*—Not associated with projects.

All expenses can post against certain accounts according to the posting criteria you set for each individual account. See Posting an Expense.

The following flowchart illustrates how you can use expenses. Click areas of this flowchart for more information.



Expense Entry Tool

You can also add multiple expenses at the same time. The Expense Entry Tool allows you to enter and post multiple expenses into the system, all from one screen. TeamConnect creates the corresponding individual records automatically for each expense. See Working with the Expense Entry Tool.

Expense Record Pages

Two expense-specific pages exist:

- The **General** page lets you enter information about the expense, such as a Description, Date, Contact who is responsible for an expensed item, Unit Price, and Quantity.
- The **Transactions** page displays a history of the expense's posting and voiding statuses.

1.7.2.1 Viewing Expenses

You can view expenses by browsing expense collections. Alternatively, you can search for an expense, for example, from the **Custom Search** page.

See Viewing Collections of Records and Searching for Specific Records for more information.

To view expenses

1. Click the **Finance** tab.
2. Click the **Expenses** link under the tab bar.

   The recently viewed accounts are listed in the right pane. To open an account record, click an account link in the **Name** column.

   A summary for each expense in a collection displays in a list pane to the right.
3. To open an expense, in the right pane, click an expense name link.

For more information about the areas on the **Expenses List** page, see User Interface.

1.7.2.2 Creating or Editing an Expense

You can create or edit an expense manually using a blank expense record, or a wizard that guides you through the process step-by-step. You can also create an expense record by using an existing expense record as a template. See Copying a Record for more information.

When you purchase merchandise or services necessary for conducting your business, you enter them as expenses into TeamConnect. Once you enter expenses, you can perform the following tasks:

- Post expenses against the respective accounts.
- Track expenses by certain projects and by specific vendors.

There can only be one expense item for each expense record. To make multiple expense entries, see Working with the Expense Entry Tool.

You can create expenses in the following locations:

- On the **Expenses List** page.
- On a project's **Expenses** page.
- Using the Expense Entry Tool on the **All** page.

Using a Wizard

Your system administrator may provide one or more wizards to help you create new expenses using a guided, step-by-step process. A wizard may be one of the available options or the only option.

If a wizard is your only option, when you click **New** the wizard opens. Complete the required fields on each page, and then click **Next** to progress to the end of the wizard. When you click **Finish** at the end of the wizard, the record is available in the appropriate list view and collection. See Viewing Expenses or Viewing Collections of Records for more information.

Note: *If a wizard is your only option, and you want to use a existing expense record to create a new account record, a wizard will not open. A blank expense record opens and you can complete the fields manually. See Copying a Record for more information.*

1.7.2.2.1 Creating or Editing an Expense Manually

Use the expense **General** page to begin manually creating an expense record. Once you save the record, you can edit it at any time.

Note: *Your company may allow you to create an expense using a wizard only, so the option to create an account manually may not be available. See Using a Wizard for more information.*

To create or edit an expense manually

1. Click the **Finance** tab.
2. Click the **Expenses** link under the tab bar.

   The **Expenses List** page opens.
3. Select one of the following options:
   - To create an expense, click **New**.
   - To edit an expense, click the **Edit Record** icon to the left of an expense.
4. From the **General** page, the following fields from the **Account Information** section are required:
   - **Description**
   - **Expense Date**
5. (optional) To enter information in fields that have been created especially for your company:
   - From the **Category** drop-down list, select an option. Inactive categories, if any, are displayed but cannot be selected.
   - A **Details** section will display below **Notes**. Enter the appropriate information in the corresponding fields.
6. (optional) To enter billing information:
   - Enter a numeric value in the **Unit Price** field.
   - Enter a numeric value in the **Quantity** field.
7. For additional field descriptions, see Expense Information Section Field Descriptions table.
8. Select a save option.

Expense General Page Field Descriptions

Some field descriptions that follow may not display based on system settings and your assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Expense Information Section Field Descriptions

Field (*=required)	Description
Category	The expense type (category), such as Transportation, Meals, or Calls. An expense record can only be associated with one category. When you select a **Category**, additional fields that are related to this expense category may appear in a Details section. Some of these new fields may be required and must be completed before you can save the record. Categories are usually pre-defined by your system administrator.
Contact	The contact who is charging for the expense item. Typically, this contact is a vendor. This field value may be validated against the associated account's Vendor posting criterion. See Setting Transaction Posting Criteria.
***Description**	The expense description.
***Expensed by**	The user who is responsible for the expenditure. The default value is the creator's user name. For an existing expense, displays a link to the user's contact record.
***Expense Date**	The **Calendar** icon allows selection of a date to associate with the expense, for example, when the expense was incurred or the date the record was made. The default date is the current date.
Project	The project associated with the account. The Find icon allows searching and selecting a project. This field value may be validated against the associated account's Project posting criteria. See Setting Transaction Posting Criteria. ***Note:*** *A link to the project record displays.*

Expense Billing Information Section Field Descriptions

Field	Description
Posting Status	The posting status for an expense can be one of the following:

	• **Not Posted—**The expense has not been posted or it has been voided. • **Posted—**The expense posted to an account. • **Failed—**An unsuccessful attempt was made to post the expense. • **Posted For Approval—**The expense has been submitted for approval to be posted.
Quantity	The total quantity of expense items.
Total	This amount is automatically calculated by TeamConnect. **Total** = **Quantity** x **Unit Price**.
Unit Price	The price per unit (item) for the expense.

Expense Notes Section Field Description

Field	Description
Notes	Comments for the expense. ***Note:*** *If you enter more than 250 characters without any spaces, you will need to scroll horizontally on the record to view all sections.*

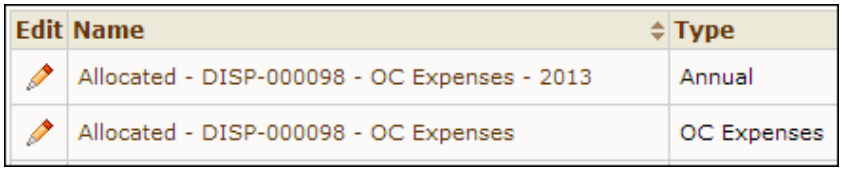
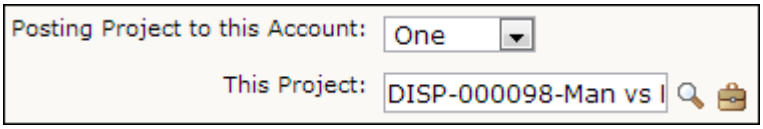
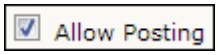
Expense Access Information Section Field Descriptions

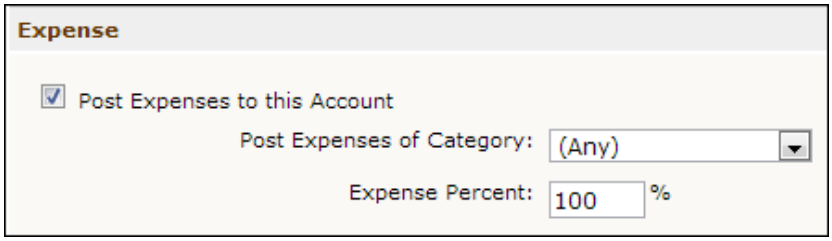
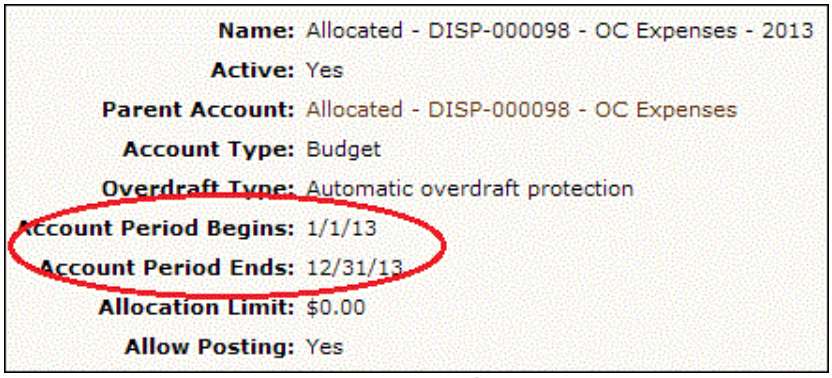
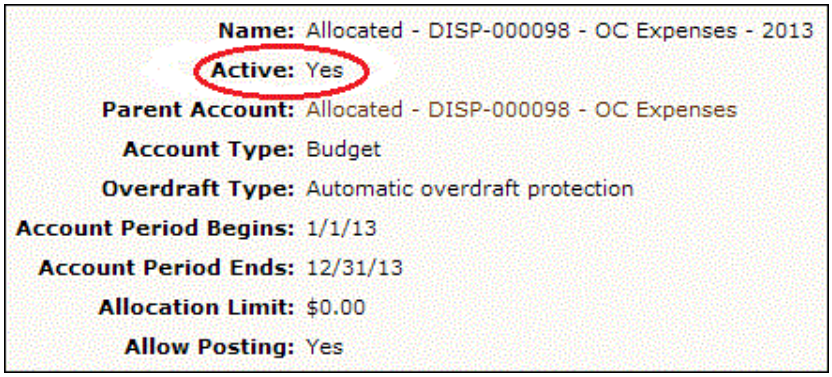
Field	Description
Created By	The name of the user who created the expense.
Created On	The date that the expense was added to TeamConnect.
Modified By	The name of the user who last modified the expense.
Modified On	The date on which the expense was modified.

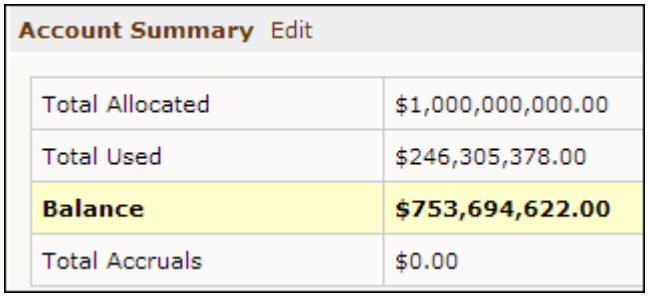
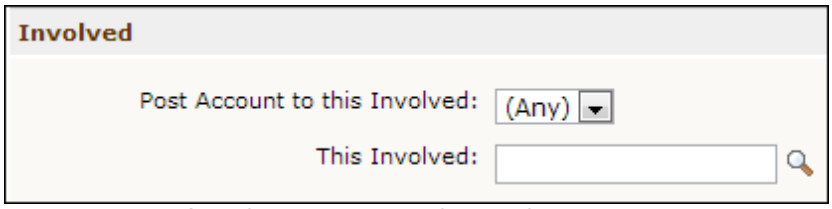
1.7.2.3 Preparing an Expense for Posting

Before posting an expense, you must prepare the expense and the account associated with it. The following table describes requirements for posting.

Requirement	Description

The expense must be associated with an account.	From **Accounts**, search for all accounts associated with the project listed on the expense. This project can be a dispute or other type of matter. If you want to post an expense to an account, it must be associated with a project. For example, enter DISP-000098 for the name value in the search. Select the account you want to post to, in this case, one with "Expenses" in the **Name**. For example, "Allocated - DISP-00098 - OC Expenses - 2013."  **Selecting Accounts for Posting Expenses** If no accounts exist for the project, create an account and specify the following fields on the **Posting Criteria** page. • Posting Project to this Account: Select **One** • This Project: Enter the name of the project  **Posting Projects to an Account**
The account must allow posting.	From the **General** page of the account, place a checkmark in the **Allow Posting** check-box if one does not exist.  **Allowing Posting to an Account**
The account must allow expenses to be posted.	1. From the **Posting Criteria** page of the account, place a checkmark in the **Post Expenses to this Account** check-box if one does not exist. 2. From the **Post Expenses of Category** drop-down, update the type of expenses you want to be able to post. 3. From the **Expense Percent** field, enter a number for the percentage of the expense you want to post. Keep at 100% if you are only posting to one account. Update the percentage if you want to split expense amounts between multiple accounts.

	 **Allowing Expenses to Post an Account**
The date of the expense must be with in the account period.	The **Expense Date** on the expense should be within the account period, which can be found on the **General** page of the associated account  **Account Period on the General Page**
The account must be active.	The status of the **Active** field on the **General** page of the account is **Yes**. See Activating or Deactivating Accounts for more information.  **Account Period on the General Page**
The account (or the parent's account) must have a balance of the same amount as the expense or more.	From the **Account Summary** page of the account, check whether the **Balance** has enough funds to cover the expense. If the account has no balance, check the **Account Summary** page of the parent account or the parent's parent account. You can continue checking parent accounts until you find a balance. If the balance does not have enough funds, add money to one of the accounts.

	 **Balance on the Account Summary Page**
The expense must include the same Involved contact that is on the account.	From the **Posting Criteria** page, if the associated account specifies an **Involved** contact in the **This Involved** field, the **Contact** field of the expense record must include the same contact. ***Note:*** *The account does not need to specify an Involved contact, even if the expense includes one.*  **Specifying an Involved Contact for Posting**

1.7.2.4 Posting an Expense

When an expense posts successfully, TeamConnect debits the budget of an account associated with the expense.

Note: *If TeamConnect cannot locate the appropriate budget, you may need to associate the expense with an account's budget. See Preparing an Expense for Posting.*

To post an expense

1. Search for an expense and open it.
2. Click **Post**.

The account transaction displays on the **Transactions** page of the expense.

Note: *After posting, the expense's system fields are not editable. Depending on system settings and your rights, the expense's custom fields may be editable. Click **Void** to void the transaction and make the system fields editable again.*

1.7.2.5 Voiding Expenses

You can void an expense to clear a post transaction from the related account. The posted expense total will be credited to the related account.

To void expenses

1. Search for an expense and open it.

   Depending on the expense status, a **Post** or **Void** button displays on the toolbar.

2. Click **Void**.

   Afterward, the corresponding account transactions will be removed from the **Transactions** page of the expense and associated account.

3. Once an expense is voided, the expense can be reposted. After the expense is voided, the expense fields can be edited. Afterward, the expense can be posted again.

1.7.2.6 Viewing Expense Transactions

Use the **Transactions** page to view a history of the expense posting to an account.

The **Transactions** page is read-only. To make changes to a posted expense, you must void the expense, modify it, and post it again. For more information, see Posting an Expense, Creating or Editing an Expense, or Voiding Expenses.

To view expense transactions

1. Search for an expense and open it.
2. Click **Transactions** in the left pane.
3. Click the account name link to view the account details, if necessary.

1.7.2.7 Viewing or Creating Expense History

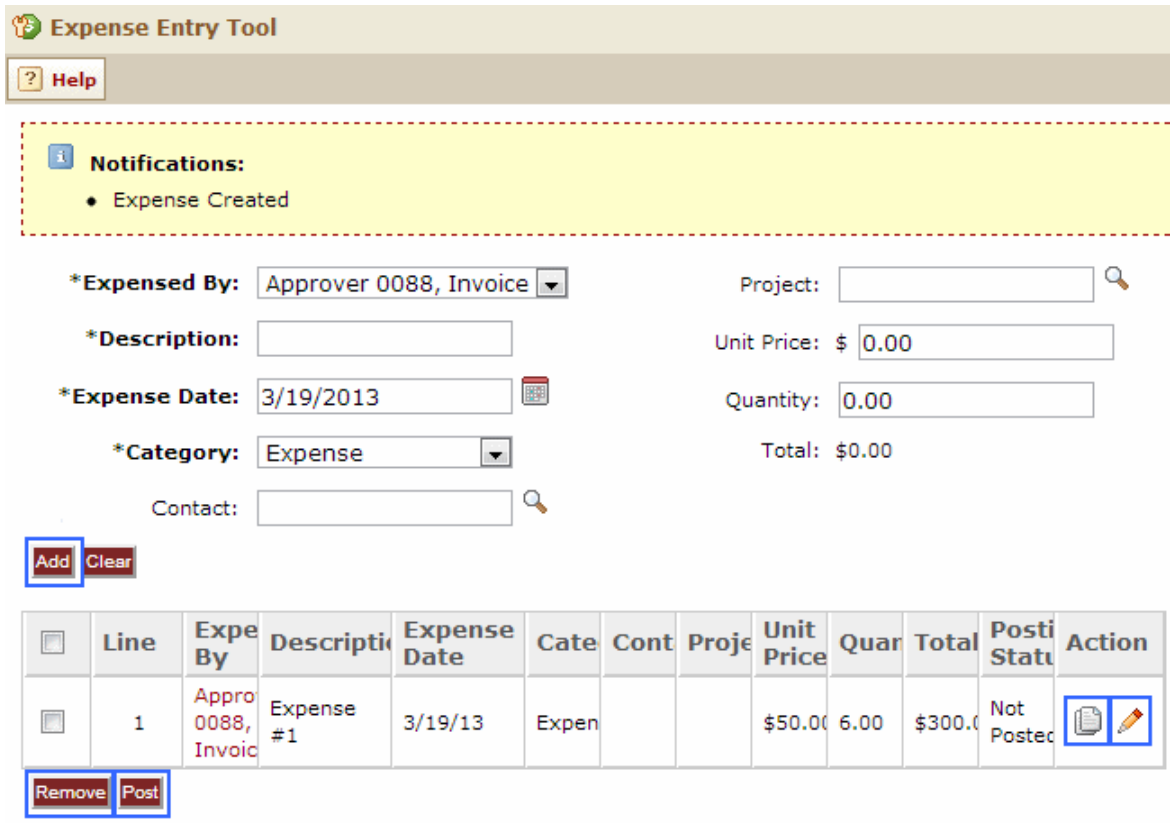
Use an expense's **History** page to create a history (containing notes about changes to the expense), view a list of history records for that expense, or perform an advanced search for a history.

For more information, see Working with Record History.

1.7.2.8 Working with the Expense Entry Tool

The Expense Entry Tool allows you to enter and post multiple expenses into the system from one screen.

Refer to the following image of the Expense Entry Tool. Click each square for more information about how you use the buttons.



Expense Entry Tool

1.7.2.8.1 Entering Expenses

The Expense Entry Tool provides a convenient way to create multiple expenses from one TeamConnect page. The **Expense Entry Tool** page has the standard functionality of a screen. See Working with the Expense Entry Tool for more information.

To enter expenses

1. Open the **Expense Entry Tool** in one of the following locations:
   - Click the **Finance** tab, and then click the **Expenses** link under the tab bar.

     Click **Expense Entry Tool** on the toolbar.
   - Click the **All** tab.

     In the **Tools** section, click **Expense Entry Tool**.

     The Expense Entry Tool opens.
2. For each expense, enter the appropriate information. See Expense Entry Tool Field Definitions for more information.
3. Click **Add**.

4. (optional) To post expenses, select the check-box to the left of the expense(s), and then click **post**.

Expense Entry Tool Field Descriptions

Some field descriptions that follow may not display based on system settings and your assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Expense Entry Tool Fields

Field (*=required)	Description
***Category**	The expense type (category), such as transportation, meals, or calls.
Contact	The contact who is charging for the expense item, for example, a vendor. The Find icon allows searching and selecting the contact who is charging you for the expense item. This value may be validated again an associated account's Contact posting criterion.
***Description**	The expense description. ***Tip:*** *To facilitate the searching process for the record, try to make the description unique and descriptive.*
Expense List	The list of entered expenses. Check-boxes on the left of expense items allow selecting expenses for editing, deleting or posting.
***Expensed By**	The user who is responsible for the expenditure. By default, it displays the creator's name. ***Note:*** *Depending on how your version of TeamConnect is configured, this field may be a drop-down list or a Search Module. For more information, see Using Search Modules.*
***Expense Date**	The date when the expense was incurred or the date the record was created. The **Calendar** icon allows selecting the desired date for the expense.

	When creating an expense, the default value is the current date (when creating an expense).
Post	This button posts the selected expenses to associated accounts. See Posting an Expense for details. ***Note:*** *To void a posted expense, you must open the expense record and void on the* ***General*** *page. See Voiding Expenses.* ***Tip:*** *Click the corresponding expense link in the displayed list to open its* ***General*** *page.*
Posting Status	The posting status for an expense can be one of the following, depending on whether you clicked the **Post** button or not: • **Not Posted** • **Posted**
Project	The project associated with the expense. The Find icon allows searching and selecting the appropriate project. This value may be validated against an associated account's Project posting criterion.
Quantity	The total quantity of expense items.
Total	This amount is automatically calculated by Team Connect: **Total** = **Unit Price** x **Quantity**.
Unit Price	The price per unit (item) for expense item.

1.7.2.8.2 Copying Expenses

The Expense Entry Tool provides a convenient way to create additional expenses from one TeamConnect page. By copying an existing expense, you can edit necessary fields and then add the expense as a new record.

To copy expenses

1. Open the **Expense Entry Tool** in one of the following locations:
   - Click the **Finance** tab, and then click the **Expenses** link under the tab bar.

     Click **Expense Entry Tool** on the toolbar.

- Click the **All** tab.

  In the **Tools** section, click **Expense Entry Tool**.

  The Expense Entry Tool opens.

2. On an existing expense, click the Copy icon .
3. Edit the resulting fields as necessary.
4. Click **Add**.

1.7.2.8.3 Editing Expenses

The Expense Entry Tool provides a convenient way to edit multiple expenses from one TeamConnect page.

To edit expenses

1. Select one of the following options to open the **Expense Entry Tool**:
   - Click the **Finance** tab, and then click the **Expenses** link under the tab bar.

     Click **Expense Entry Tool** on the toolbar.
   - Click the **All** tab.

     In the **Tools** section, click **Expense Entry Tool**.

     The Expense Entry Tool opens.
2. On the table of existing expenses, under the **Action** column, click the Edit icon next to the expense to edit.
3. Make changes to fields described in Expense Entry Tool Field Definitions.
4. Click **OK** for each updated expense.

1.7.2.8.4 Posting Expenses

The Expense Entry Tool provides a convenient way to post multiple expenses from one TeamConnect page.

To post expenses

1. Select one of the following options to open the **Expense Entry Tool**:
   - Click the **Finance** tab, and then click the **Expenses** link under the tab bar.

     Click **Expense Entry Tool** on the toolbar.
   - Click the **All** tab.

In the **Tools** section, click **Expense Entry Tool**.

The Expense Entry Tool opens.

2. To post all expenses, select the top check-box, or select the check-boxes for expenses to post.
3. Click **Post**.
4. Afterward, the corresponding account transactions will display on the **Transactions** page of the expense and associated account.

1.7.2.8.5 Deleting Expenses

The Expense Entry Tool provides a convenient way to delete multiple expenses from one TeamConnect page.

To delete expenses

1. Select one of the following options to open the **Expense Entry Tool**:
   - Click the **Finance** tab, and then click the **Expenses** link under the tab bar.

     Click **Expense Entry Tool** on the toolbar.
   - Click the **All** tab.

     In the **Tools** section, click **Expense Entry Tool**.

     The Expense Entry Tool opens.
2. To delete expenses you have created with this tool, select the top check-box or select individual check-boxes for expenses to delete.
3. Click **Remove**.

1.7.2.9 Updating Expense Unit Prices

Use the Expense Unit Prices tool to update one or more prices that are linked to active expense codes.

Note: *Typically, expense codes are set up in advance and you cannot delete or change them. You cannot use this tool to add new expense codes - see your system administrator if you want to add or change codes.*

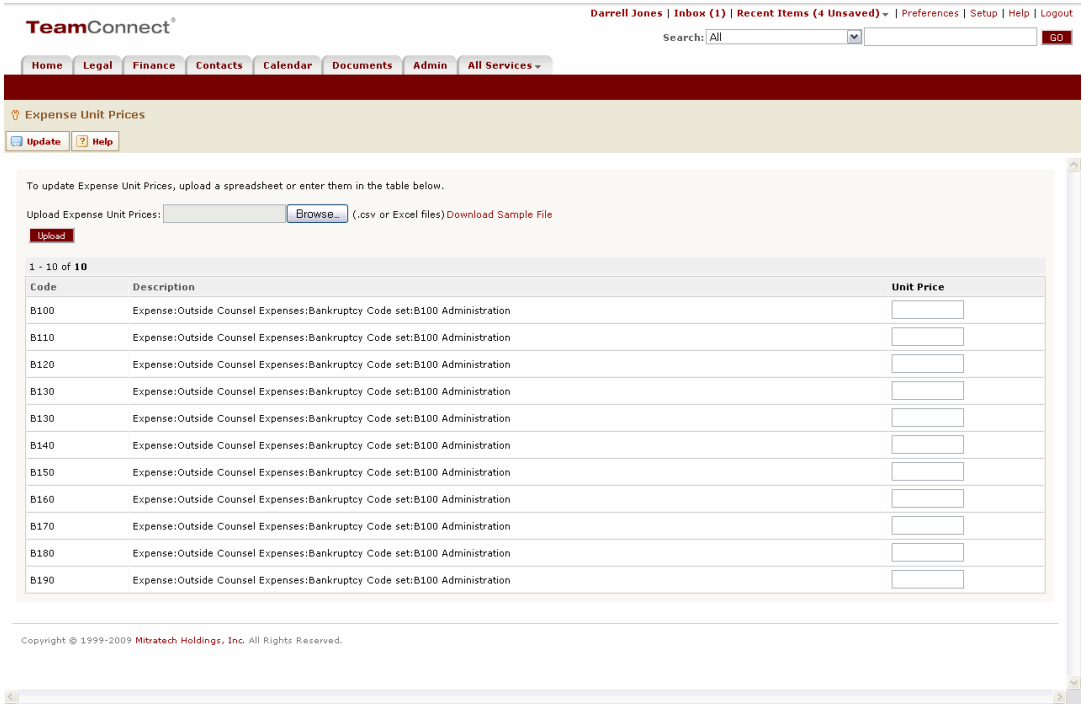
You can update expense unit prices in the following ways:

- Upload a .csv or Excel file—Create a data file that contains the new prices, and then upload the file to TeamConnect.
- Enter new prices manually—Type the modified rates on the Expense Unit Prices page.

To access the Expense Unit Prices tool

1. Click the **All** tab.
2. Under **Tools**, click **Expense Unit Prices**.

   The **Expense Unit Prices** page opens.



Expense Unit Prices Page

Creating Expense Unit Price Data Files

Before you can upload prices into TeamConnect, you must first create the file that you want to upload. You can upload an Excel spreadsheet or a .csv file.

To create an expense unit price data file

Create an Excel spreadsheet or .csv file based on the following guidelines:

- The first row must contain labels only.
- Additional rows must contain expense unit price data only

Note: *TeamConnect provides a sample Excel file. To access this file, click* ***Download Sample File*** *on the Expense Unit Prices page. The sample file opens in Excel.*

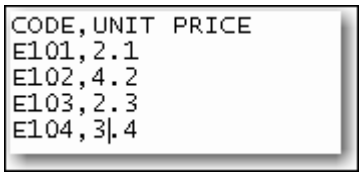
Sample Excel File

A completed expense unit price Excel file may appear as follows:

	A	B
1	CODE	UNIT PRICE
2	E101	0.1
3	E102	0.2
4	E103	0.3
5	E104	0.4
6		

Sample .csv File

A completed expense unit price .csv file may appear as follows:



Uploading Expense Unit Price Data

Once you create the data files, you can upload them to TeamConnect.

To upload expense unit price data

1. With the **Expense Unit Prices** page open, click **Browse** and locate the file that you want to upload.
2. Click **Upload**.

   The **Unit Price** column is updated.

Note: *You can only update prices for codes that currently exist. If you try to upload prices for codes that do not exist, an error message appears and none of the unit prices are updated.*

Updating Expense Unit Prices Manually

You can manually update expense unit prices on the Expense Unit Prices page.

To update expense unit prices manually

1. In the **Unit Price** column, modify the appropriate prices.
2. Click **Update** to save the changes.

1.7.3 Invoices

Invoices in TeamConnect represent bills sent to your organization by outside counsel and other vendors who provide work on your projects and other services. Invoices can be posted against accounts and projects, according to the posting criteria you set for each individual account.

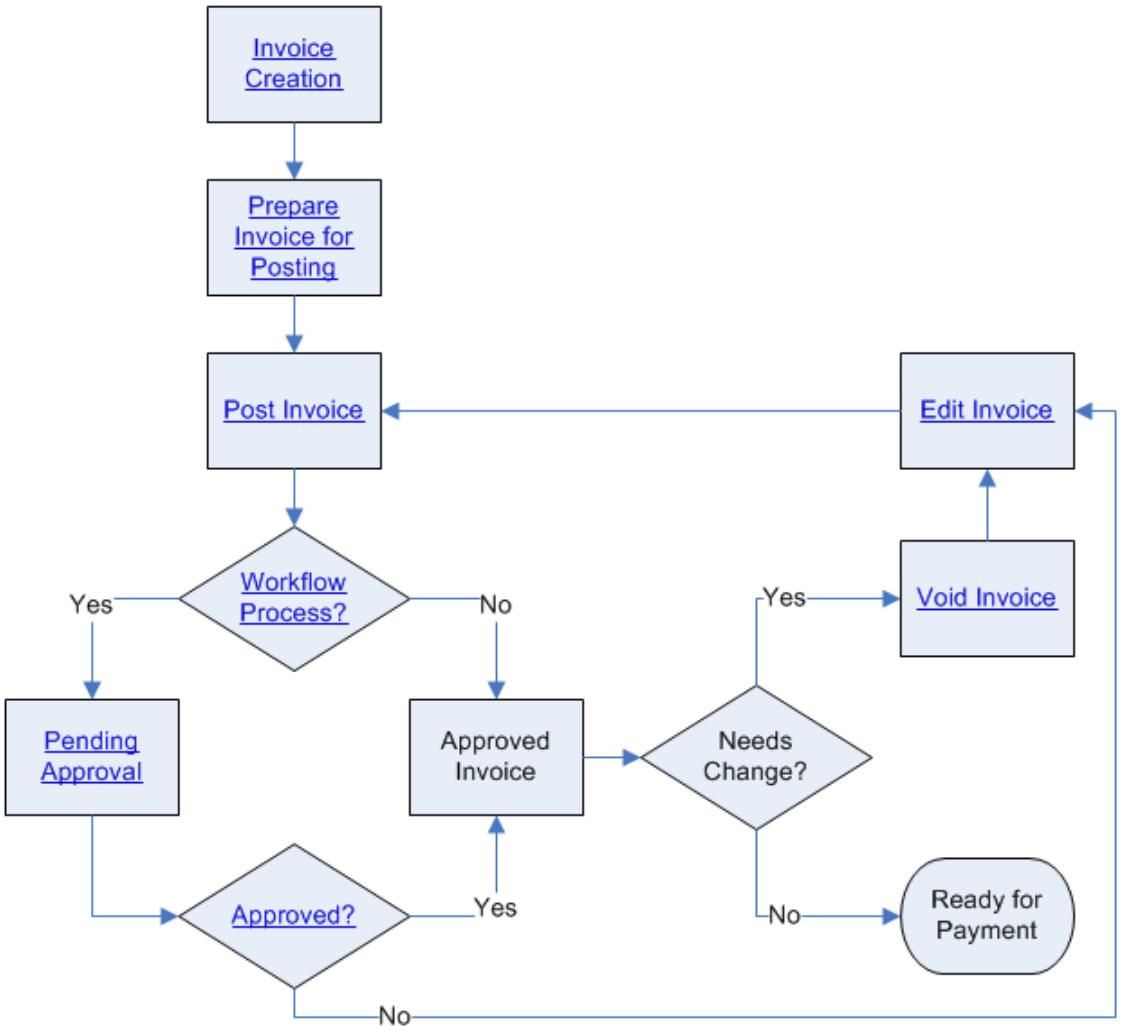
Important: *Certain invoice fields and functionality depend on a combination of system settings and your user rights. As a result, your invoices may look different from the descriptions in this section and some features described may not be available. Contact your TeamConnect administrator if you have questions.*

Two ways for invoices to appear in TeamConnect exist:

- Manually created directly in TeamConnect
- Uploaded from Collaborati, if you subscribed to Collaborati Spend Management service

  Invoices are transferred from another system as per custom integration your organization may have in place (e.g. with a 3rd party e-billing system)

During the invoice life cycle, multiple users inside and outside your organization can perform an action for the same invoice. The following flowchart illustrates this life cycle. **Click areas of the flowchart for more information.**

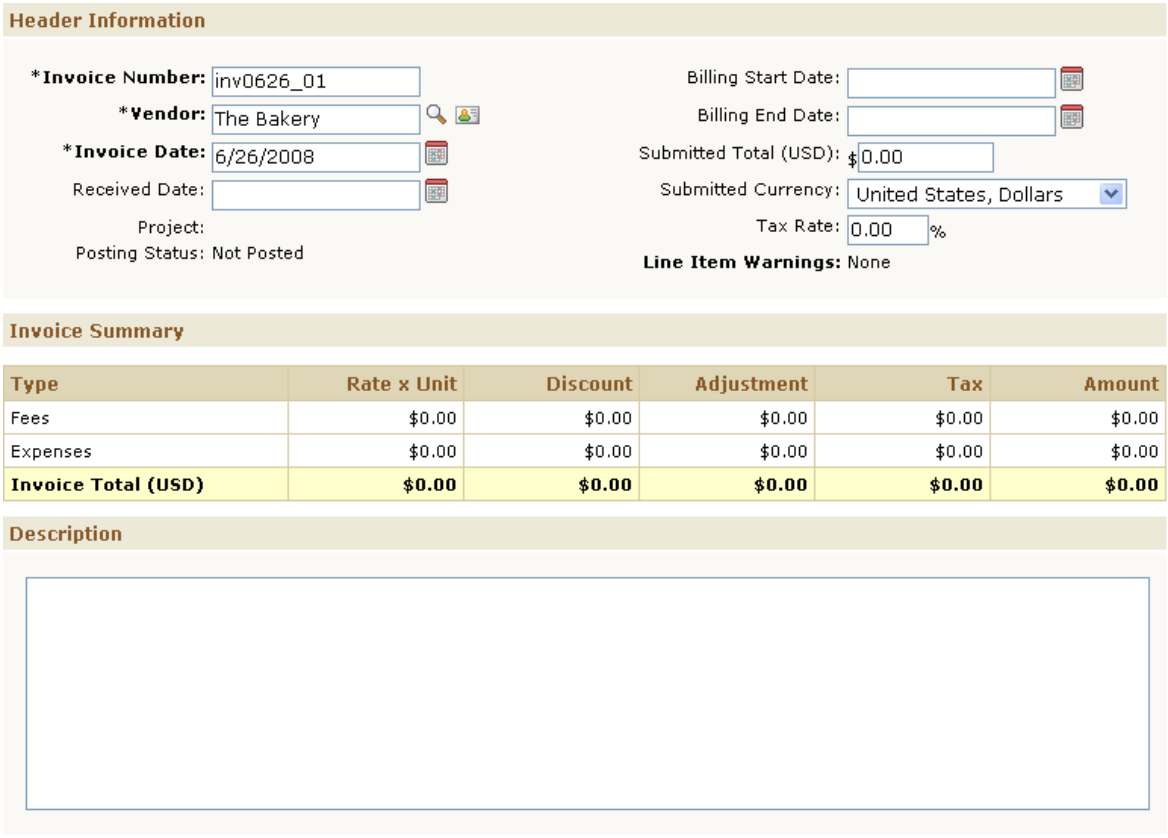


- If the vendor submits the invoice through Collaborati, you do not need to create the invoice.
- If the vendor submits the invoice through Collaborati, the invoice might already be posted.
- During the pending approval phases, you can adjust an invoice summary or invoice line items.
- From the **My Approvals** page, an approver can approve or reject an invoice.

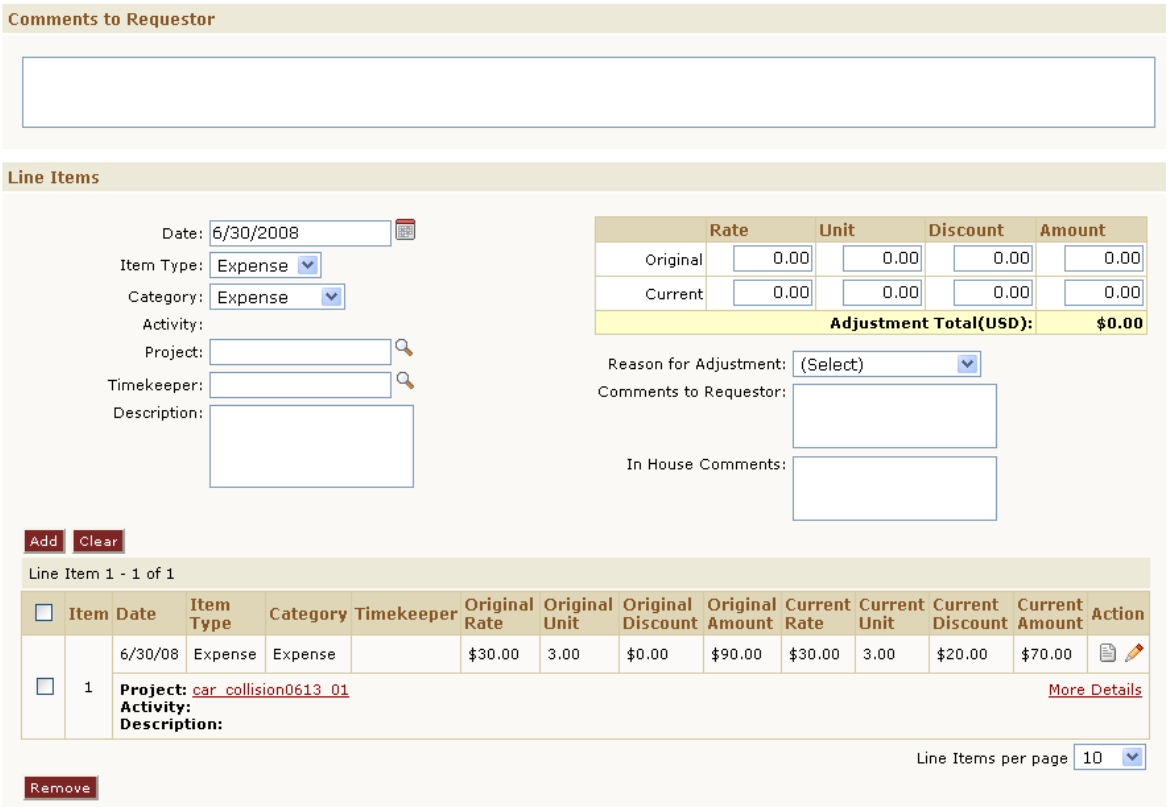
Invoice Record Pages

There are four invoice-specific pages:

- The **General** page lets you enter the following information about the invoice:
  - **Header Information—**Specifies general information about the invoice, such as a **Description**, **Date**, **Vendor**, **Billing Start Date**, **Billing End Date**.
  - **Tax Information—**Specifies tax types, levels, and rates.
  - **Invoice Summary—**Displays totals for invoice expense line items, fee line items, and the invoice total (all line items).
  - **Line Items—**Individual expenses or fees that are being billed on the invoice.
- The **Summary Breakdowns** page lets you view a summary of line items grouped together by Timekeeper or Category, and organized by matter. If the invoice is associated with more than one matter, an **All Matters** section also appears on this page, showing all of the associated matters grouped by Timekeeper or Category.
- The **Transactions** page displays a history of the invoice's posts and voids.
- The **Versions** page is read-only, and displays links to prior versions of this invoice, if more than one version of an invoice exists. This page only applies to previously rejected invoices that were resubmitted.



Invoice - Genearl Page (Header Information, Invoice Summary, Description Sections)



Invoice - General Page (Comments to Requestor, Line Items Sections) Continued

1.7.3.1 Viewing Invoices

You can view invoices by browsing invoice collections. Alternatively, you can search for an invoice. See Searching for Specific Records for more information.

When viewing an invoice, the **Line Items** section displays fields that are different from the **Line Items** section in edit-mode. The fields from the **Invoice Information** and **Invoice Summary** sections are the same as described in the Creating an Invoice Manually, with the exception of the following fields that may appear under certain circumstances in the **Header Information** section:

- **Appeal Invoice Number—**Displays the Invoice Number of the Appeal Invoice associated with the current invoice. Clicking the **Appeal Invoice Number** opens the Appeal Invoice.

  This field only appears if an Appeal Invoice based on the current invoice has been created and synced to TeamConnect.

- **Original Invoice Printable View—**Displays the Invoice Number of the original invoice associated with the current Appeal Invoice. This field only appears if the current invoice is of type Appeal. It displays the Invoice Number of the invoice the Appeal Invoice is based on.

  Clicking the **Original Invoice Printable View** link launches the printable view pop-up for the original invoice. The **Appealed Line Items** check-box appears directly below the **Line Items** check-box of the printable view pop-up. When selected, the printable view will only return line items from the original invoice that have been appealed in the new Appeal Invoice.

  Select the desired **Sections** check-boxes, then click **Ok** to open the original invoice's printable view in a new browser window.

Note: *For sections with a search results display, the default setting is* ***Display all result pages****.*

There may be several types of invoices, for example Non-US Tax Type.

To view an invoice

1. Click the **Finance** tab.
2. Click the **Invoices** link under the tab bar.

   The recently viewed invoices are listed in the right pane.

   For more information, see the Invoice, General Page, Line Items Section fields table.

   A summary for each invoice in a collection displays in a list pane to the right.

   Invoices of type Appeal have a flag that identifies the invoice as an Appeal Invoice. This is intended to allow workflows to be configured differently for Appeal Invoices as opposed to other types of invoices.
3. To open an invoice, in the right pane, click an invoice name link.

   For information about the **Invoice Header** section, see Invoice Header Information Section table.

   When viewing an invoice, the **Line Items** section displays fields that are different from the invoice when creating or editing an invoice, or adjusting the line item. For more information, see the Invoice, General Page, Line Items Section fields table.

For more information about the areas on the Invoices List page, see User Interface.

Invoice, General Page, Line Items Section Field Descriptions (read-only)

Field	Description
Adjust	(Batch adjustment or In-Line & Bulk adjustment only) Click to adjust one or more invoice line item.
Show Filter/ Hide Filter	Click the link or green arrow to toggle between displaying/hiding the invoice line items filter conditions.
View	From the drop-down list, select one of the following: • **All Line Items** (default) • **Line Item Warnings**
The following fields apply per invoice line item row	
Action	A **Copy** icon allows copying the line item. An **Edit** icon allows editing the line item.

Additional information	If available, the following information displays: • Project • Activity • Description
Category	Displays the category associated with the Line Item type (Task/Fee Category or Expense Category).
Date	Displays the date on which the services were provided or expenses were incurred.
Item	Click a link to view the individual line item record. Message icons indicate associated warnings, errors, or information messages. See the **Messages** field description below.
Item Type	Displays either **Fee** or **Expense** for the line item type.
Original Amount	This amount is automatically calculated when you add the line item. **Amount** = (**Rate** x **Units**) - **Discount**. Displays the current total for a Line Item.
Original Discount	Displays the discount amount. The discount will display as a flat amount.
Original Rate	The hourly rate for a billed task or per unit cost for an expense.
Original Unit	Displays the number of hours for fee items or units for expense items.
Tax Type	Displays the tax code(s), if any, that were selected for the line item. This field only appears if the invoice has a Non-US tax type.
Timekeeper	The Timekeeper or contact who performed the services.

1.7.3.1.1 Searching for Invoice Line Items

You can filter line items that display for an invoice. For example, you can display line items associated with a specific timekeeper or task code.

This is especially useful when reviewing large electronic invoices that have hundreds of line items. Two search views for line items are available by default.

For invoices with a large number of line items, you can select search criteria from a list unless the number of items in the list exceeds the maximum number of items allowed as specified in the Admin Settings. In this case, a search box is provided that lets you search across all values in the database.

To search for invoice line items

1. Search for an invoice and open it.

   The **General** page opens.

2. In the **Line Items** section, select a search view from the **View** drop-down list:
   - **All Line Items—**Displays all Line Items for the invoice (default selection).
   - **Line Item Warnings—**Displays only Line Items that have warnings (produced by invoice validation rules, as specified by your TeamConnect administrator).

     The list might include additional search views.

3. To apply additional search criteria, click the **Show Filter** link.
   - Enter additional Line Items search criteria from the displayed fields. For example, if the search view is **All Line Items**, you can enter the following:
     - To display only Fee Line Items, in the **Item Type** row, leave the first drop-down list option as **Equal To**. In the second drop-down list, select **Fee**.
     - To display only Expense Line Items, in the **Item Type** row, leave the first drop-down list option as **Equal To**. In the second drop-down list, select **Expense**.
     - To display only Fee line items with a specific task code (category), in the **Task Code** row, leave the first drop-down list option as **Equal To**. In the second drop-down list, select a category.
     - To display only Fee line items with a specific activity code (category), in the **Activity Item** row, leave the first drop-down list option as **Equal To**. In the second drop-down list, select a category.
     - To display only Line Items for a specific project, in the **Project Name** row, leave the first drop-down list option as **Equal To**. In the second drop-down list, select the project record type (for example, Dispute). In the third field, search for the project record name.
     - To display only Line Items with specific Warning message content, in the **Warning Description** field, type the word or text to search.
   - If the Search icon is next to the search box, you must enter an existing value.
   - You can enter multiple values for fields with the Add icon.
     - After you enter a value, click the Add icon to enter another value.
     - To remove a value from the search, click the Remove icon next to the value. To remove the first value you entered, select the text with the mouse and delete it.

4. Click **Search**.

1.7.3.1.2 Appeals Invoices

Enabling the Appeals Invoices functionality allows vendors recourse when a submitted invoice is not entirely approved as submitted in CSM. This setting can be enabled on the **General** tab of the **CSM Settings** page.

Appeals Invoices Setup and Details

For the appeals to work as designed, TeamConnect users at a given stop must be able to edit invoices before posting.

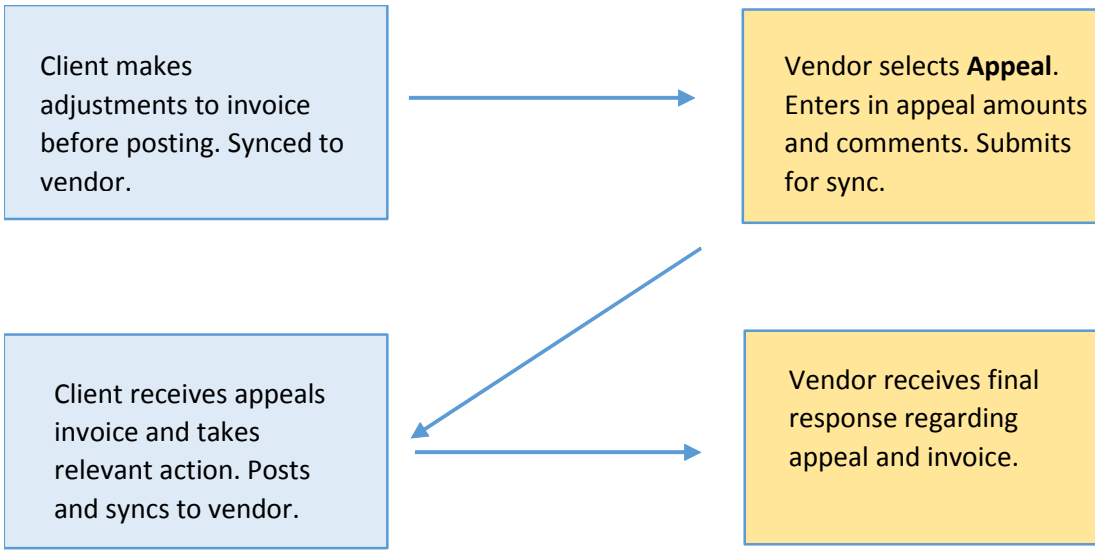
Vendors are only able to submit one appeal per invoice. The appeal will only include line items where the original amount was not approved. See the table below for examples.

Original Invoice Amount	Amount Approved	Amount Visible on Appeals Invoice
$200.00	$150.00	$50.00
$100.00	$80.00	$20.00
$50.00	$50.00	N/A, will not show

Vendors are also able to provide a comment for each line item adjustment detailing the reason behind the appeal.

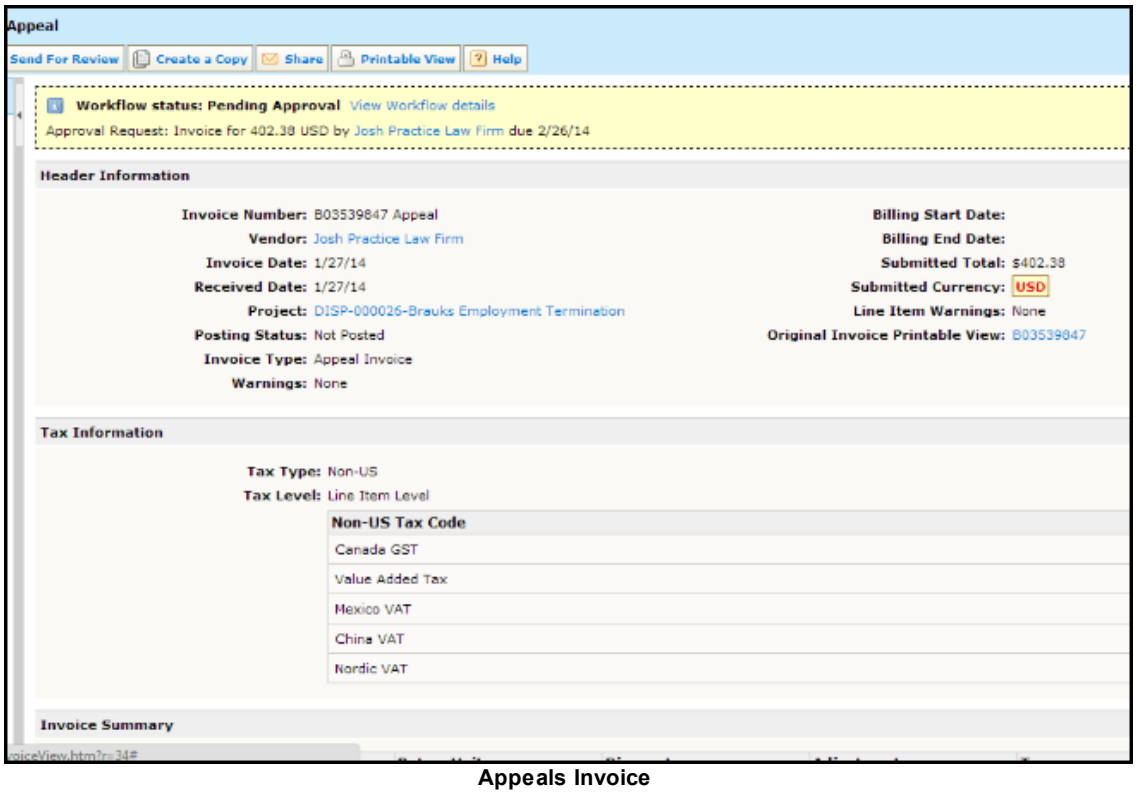
Appeals Invoice Workflow

The flowchart below demonstrates an appeal invoice workflow.



Client-side Process

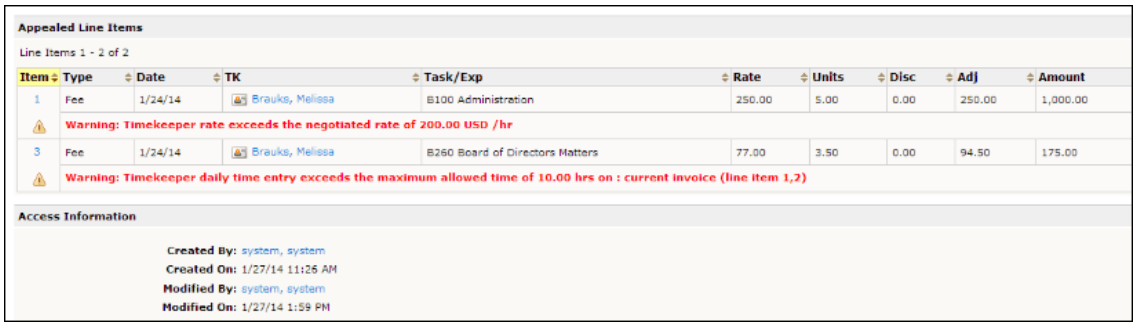
1. Enable Appeals Invoices on the **General** tab of the **CSM Settings** page.
2. Upon receipt of an invoice from Collaborati, make adjustments to line items *before posting*, if desired.
3. Submit and sync.
4. If vendor appeals, an appeals invoice will generate. This invoice will have the same number as the original invoice along with "Appeal" added to the end of it.



Appeals Invoice

5. After viewing the adjustments and comments made by the vendor, make the desired edits, save, and submit the appeals invoice. Sync with Collaborati. ***Note:*** *Only the items that were not fully approved on the initial invoice will be included.*

After this submission, the vendor will not be able to send another appeal invoice for that same original invoice.



Appealed Line Items View

Configuration Tips

The following best practices will assist in setting up appeals invoices:

- Configure object views to place appealed line items block directly under the line items block for easy comparison.
- Enable the approval rules to allow users to edit items before posting.

However, for optimized configuration, contact Mitratech Services at professionalservices@mitratech.com.

1.7.3.2 Differences Among Invoices

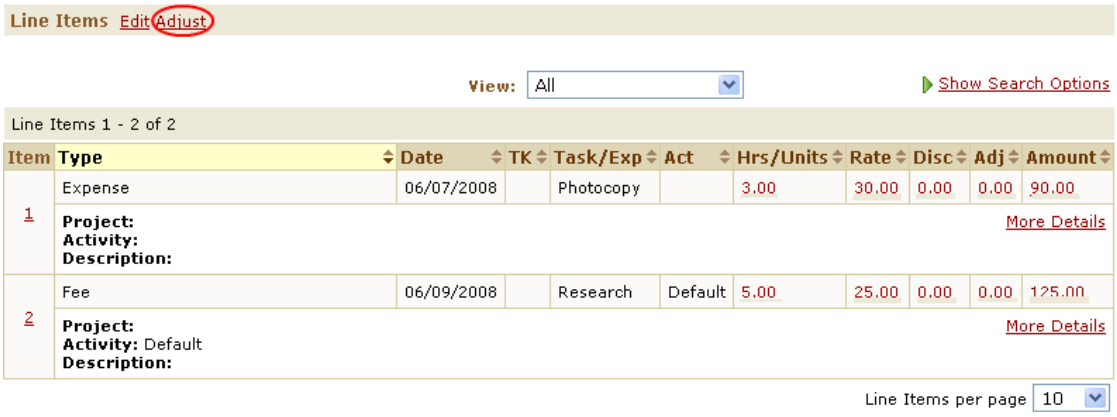
Fields that display on invoice pages may vary based on the following scenarios:

Line Item Adjustment Types

Depending on TeamConnect system settings, when you adjust invoice line items, either the Detail Adjustment format, the Batch Adjustment format, the In-Line & Bulk Adjustment format, or the Bulk Adjustment format are available. This system setting affects invoice fields that display on the **General** page, **Line Items** section when adjusting line items.

The ways to tell which line item adjustment setting applies to your system are:

- On an existing invoice's **General** page, if an **Adjust** link displays near the **Line Items** section bar, then the setting is set for Batch Adjustment or In-Line & Bulk Adjustment.



Invoice General Page

- On an existing invoice's **General** page, if the line item numeric values (**Rate**, **Unit**, **Amount**) display as links, then the setting is set for Detail Adjustment.

Invoice General Page, Line Items Section with Numeric Value Links for Detail Adjustment

Invoice Duplicates

Based on system settings TeamConnect can check for duplicate invoices in the system to prevent creation of duplicates. For more information, see Invoice Duplicates.

Invoice Versions

If a previously entered invoice was rejected in TeamConnect, when the invoice is re-entered, it is not considered a duplicate. Resubmitting an invoice creates a new version of the original invoice. For more information, see Invoice Versions and Viewing Previous Invoice Versions.

Invoices Submitted in Different Currencies

If an invoice is submitted in a currency that is different from your default system currency, you can view that invoice's values in either your system currency or the submitted currency. For more information, see Viewing Invoices Submitted in Different Currencies.

Invoice Workflow

The invoice fields that you see and the and functionality that is available to you depend on the following:

1. Whether Workflow approval is required. See either Invoice Procedures (without Workflow) or Invoice Procedures (with Workflow) for the list of tasks you can perform depending on whether workflow is required.
2. Whether the invoice sender uses a different currency from the adjustor.
3. Whether a solution developer created invoice or line item customizations. Contact the TeamConnect administrator for more information.

1.7.3.2.1 Invoice Duplicates

Depending on system settings, TeamConnect may prevent you from creating duplicate invoices. A duplicate invoice is an invoice that has identical values for the following fields as an existing invoice:

- Invoice number
- Vendor ID
- Invoice Date that falls within 12 months of the existing invoice
- Invoice Type

If a new invoice is detected to be a duplicate, the system will display an error message. Contact the TeamConnect administrator for questions about saving duplicate invoices.

1.7.3.2.2 Invoice Versions

An invoice can have multiple versions stored in TeamConnect. When an invoice submitted for posting has been rejected by an approver in an invoice workflow, and the rejected invoice is later modified and submitted again for approval, the invoice will be saved in TeamConnect as a newer version. Different invoice versions will be differentiated with a version number.

Points to Remember

- You will be able to view the previously rejected invoice and its workflow history while reviewing the re-submitted invoice.
- On an invoice search view results list, only the latest version of an invoice with a rejection history displays. To view previous versions of the invoice, you must open the latest version and then select the **Versions** page. Click the link of the invoice version to view it.
- On an invoice's **Versions** page, the originally rejected invoice displays with a version number 1.
- Prior versions of invoices are read-only and cannot be adjusted or updated. Only the current invoice version can be adjusted, as long as the invoice is in the appropriate state and you have appropriate adjustment rights. See Adjusting an Invoice Summary or Adjusting Invoice Line Items for more information on adjusting your invoice.
- On an invoice's **Versions** page (**Invoice Version** field), the version number displays in parentheses in the **Invoice No.** field. The **Versions** page is read-only and displays links to previously rejected invoice(s), or related invoice versions.

- If the invoice has been rejected and resubmitted multiple times, you will see all previously rejected invoice versions under the **Invoice Version** column.

1.7.3.2.2.1 Viewing Previous Invoice Versions

On the **Versions** tab (**Invoice Version** field) and on a previously rejected invoice's **General** tab, the version number displays in parentheses in the **Invoice No.** field. The **Versions** tab is read-only and displays links to previously rejected invoice(s), or related invoice versions.

On this page, you can click the **Invoice Version** link to view the versioned invoice.

If the invoice is rejected and resubmitted multiple times, you will see all previously rejected invoice versions in the **Invoice Version** column.

To view previous invoice versions (workflow)

1. Search for an invoice and open it.
2. Click the **Versions** link in the left pane.
3. To view a previous version of an invoice, click its link in the **Invoice Version** column.

1.7.3.2.3 Viewing Invoices Submitted in Different Currencies

If an invoice has been submitted in a currency other than your system currency, by default, the invoice's values will display in the submitted currency. You can change the invoice to display in the system TeamConnect currency. The rate value & the conversion date will be additionally displayed under the Exchange Rate field.

Tips and Warnings

- If the invoice display has been updated to show the system TeamConnect currency, when an approver adjusts the invoice, values will display and be calculated against the originally submitted currency values.
- If the invoice has not posted and you change the view to a different currency, the current exchange rate will apply, as specified in your multi-currency table. Contact your Administrator for details.
- If the invoice has posted and you change the view to a different currency, the conversion rate will be based on the exchange rate at the time of posting.

To view an invoice submitted in a different currency

1. Search for an invoice and open it.
2. Click **Edit**.
3. From the **Submitted Currency** drop-down list, select your TeamConnect system currency.
4. Afterward the invoice values are converted from the submitted currency to your system currency.

Caution: *If you adjust the invoice Summary or Line Items, adjustment values display and are calculated in the submitted currency values.*

Example

For example, the invoice was submitted in Pounds (Great Britain). The approver changes the invoice's currency view to US Dollars (USD). All invoice currency values will display in the equivalent USD values.

If the approver adjusts the invoice, the adjustment screen will display values in the originally submitted currency (GBP). Adjustments will be applied in GBP as well.

After the approver makes adjustments and clicks OK, the Invoice General Tab view will revert to displayed values in USD (as selected in the View in drop-down list).

1.7.3.2.4 Invoice Procedures (without Workflow)

The tasks below are related to working with invoices when no workflow process is required.

- Searching for Specific Records
- Viewing Invoices
- Creating an Invoice Manually
- Editing Invoices
- Adjusting Invoice Line Items
- Posting an Invoice
- Voiding an Invoice
- Deleting Records

When there is no invoice workflow process, the general life cycle of an invoice is like:

1. A new invoice has the status, **Not Posted**.
2. After the invoice information is entered, including line items and related project/account information, you can post the invoice. Afterward, if all line items post successfully, the invoice status displays **Posted**. If all line items do not post successfully, the invoice status displays **Failed**.
3. After an invoice has posted, you can click **Void** to void the invoice. Afterward, the invoice status displays **Not Posted** again.

1.7.3.2.5 Invoice Procedures (with Workflow)

When an approval workflow is in place for invoices, there are typically at least 4 roles for invoice users (creator, adjustor/approver, reviewer, process manager). The tasks below are related to working with invoices when a workflow process is required.

Invoice Creator

- Searching for Specific Records
- Viewing Invoices
- Creating an Invoice Manually
- Editing Invoices
- Posting an Invoice

Adjustor and/or Approver

- Searching for Specific Records
- Viewing Invoices
- Adjusting an Invoice Summary
- Adjusting Invoice Line Items
- Approving Invoices
- Rejecting Invoices
- Voiding an Invoice

Reviewer

- Viewing Invoices
- Reviewing an Invoice

Process Manager

- Managing Workflow Processes

When there is an invoice workflow process (for example, approval is required for posting an invoice), the general life cycle of an invoice is like:

1. A new invoice has the status, **Not Posted**.
2. After the invoice creator has entered invoice information, including line items and related project/account information, the creator can click Post. Afterward, the invoice status displays **Pending Approval**.

   While an invoice is pending approval, an adjustor can adjust the invoice summary or the invoice line items.
3. Invoice approvers can do the following:
   - Approve the invoice to post. Afterward, if all line items post successfully, the invoice status displays **Posted**. If all line items do not post successfully, the invoice status displays **Failed**.

- Reject the invoice. Afterward, the invoice status displays **Rejected**. Then the invoice creator can edit the invoice and submit it to post again.
- Send the invoice to another user for review. The invoice status continues to display **Pending Approval**.

4. After an invoice has posted, you can click **Void** to void the invoice. Afterward, the invoice status displays **Not Posted** again.

1.7.3.3 Creating an Invoice Manually

Use the invoice **General** page to start manually creating an invoice record.

When creating invoices, you can add general information as well as add invoice line items. You can also adjust line items (for scenarios when you are entering a paper invoice with line item adjustments into TeamConnect).

You can also create new invoice records by copying similar existing records. See Copying a Record for more information.

Your system administrator may provide one or more wizards to help you create new invoices using a guided, step-by-step process. A wizard may be one of the available options or the only option.

To create an invoice using a wizard

Note: *If a wizard is your only option, and you want to use an existing invoice record to create a new invoice record, a wizard will not open. A blank invoice record opens and you can complete the fields manually. See Editing Invoices for more information.*

1. Click the **Finance** tab.
2. Click the **Invoices** link under the tab bar.
3. Click the **New**, and then select **New Invoice Wizard** from the drop-down list.

   The **New Invoice** wizard opens to the **General** page.
4. Complete all of the required fields and any other fields for which you have information. See Invoice General Page Field Descriptions for more information.
5. Click **Next** to continue to the next page, or click the appropriate link in the left pane.

   If a **Finish** button appears on any page, click it if you want to save the matter with only the information that is currently entered. This is useful if you do not have complete matter details or if you only need to generate a matter ID. Once the matter is saved, you can add additional information whenever you receive it.

   If you need to make changes on a previous page of the wizard, click the **Back** button or the appropriate page in the left pane; if you want to cancel the wizard, click **Cancel**.

   The **Line Items** page opens.
6. For each line item, complete all required fields and any other fields for which you have information. See Invoice General Page Line Items Section Field Descriptions. for more information.

7. To add more line items, click **Add**, and then repeat the procedure above.
8. Click **Next**.

The invoice saves and its **General** page displays.

To create an invoice manually

1. Click the **Finance** tab.
2. Click the **Invoices** link under the tab bar.
3. Click **New**.
4. On the **General** page, the following fields from **Invoice Header** section are required:
   - **Invoice Number**
   - **Vendor—**Click the Search Contacts icon to select a vendor contact.
   - **Invoice Date—**Click the Calendar icon next to this field to select the date when the invoice was issued.
5. For additional information about **Invoice Header** section fields, see Invoice General Page Field Descriptions.
6. The **Invoice Summary** section is read-only during invoice creation. After adding invoice line items, the **Invoice Summary** section automatically updates with total summaries for line items.
7. Complete the **Description** and **Comments to Requestor** fields if necessary.
8. To enter invoice line items, see Adding Invoice Line Items.
9. Select a save option.

Invoice General Page Field Descriptions

Some field descriptions that follow may or may not display based on system settings and your assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Invoice Header Information Section

Field (*=required)	Description
Billing End Date	Click the **Calendar** icon next to the field to select the end date for the invoice period.
Billing Start Date	Click the **Calendar** icon next to the field to select the start date for the invoice period.

Display Currency	The type of currency in which you want to use to view this invoice. This field only appears if the **Submitted Currency** is different from the default system currency.
Exchange Rate	The exchange rate that applies to this invoice. This field only appears if the **Submitted Currency** is different from the **Display Currency**.
***Invoice Date**	Displays the invoice date, or if in edit mode, click the **Calendar** icon next to this field to select the date when the invoice was issued.
***Invoice Number**	Displays the invoice number, or if in edit mode, allows you to enter the invoice number.
Invoice Type	The type of invoice being created or edited. In addition to the typical **Standard** Invoice, additional options are as follows: • **Credit Note—**A legal instrument that corrects a Non-US Tax invoice. • **Accrual—**An estimate of an upcoming bill. • **Shadow Invoice—**A detailed invoice of work performed that is not intended to be actually paid, because an alternate fee arrangement exists between client and vendor. The invoice is posted to allow the client to do financial analysis. For example, if vendors receive a fixed-fee or retainer fee as payment, clients use shadow invoices to keep a record of their work and perform financial analysis. See Creating a Shadow Invoice Account for more information. ***Note:*** *When editing an invoice, this field only appears for Accrual or Credit Note invoices.*
Line Item Warnings	Displays the number of line items with warnings based on your validation rules. If there are no rules activated or there are no warnings, no values display.
Posting Status	The posting status always displays in read-only mode. The posting status for an invoice can be one of the following: • **Not Posted—**The invoice has not been posted or it has been voided. Displays as the default status for new invoices. • **Rejected—**The invoice has been rejected during workflow approval.

	• **Posted—**The invoice is posted. • **Failed—**The invoice could not post because of an issue. For example, the related account did not exist or the invoice total exceeded the allocated budget. For more details, see Posting an Invoice and Voiding an Invoice.
Project	Displays one of the following: • If this invoice is allocated to only one project, displays a link to the project record in the upper-right corner. • If this invoice is allocated towards multiple projects, displays Multiple Projects in upper-right corner (non-clickable). In this scenario, projects are displayed in the first column of the line items.
Received Date	Displays the date the invoice was received, or if in edit mode, allows you to click the **Calendar** icon next to this field to select the date when the invoice was received.
Reference Number	The reference number for an invoice that is also a Credit Note. Many invoices may use the same reference number. This field only appears if the invoice type is Credit Notes.
Submitted Currency	This field is available when the invoice was submitted in a currency other than the default system currency. Select a currency to apply to the invoice values. ***Note:*** *The invoice can be adjusted only in the submitted currency.*
Submitted Total	(optional) Enter the total amount of the invoice. If this value does not match the actual line items total, you may not be able to save the invoice. ***Note:*** *For CSM invoices, this field is automatically populated by the invoice total.*
***Vendor**	Displays the vendor name, or if in edit mode, allows you to find and select the contact record of the vendor who sent the invoice.

Tax Information Section

Field	Description

Tax Type		Specify the type of taxes the invoice contains with one of the following options: • **US—**Indicates the invoice does not contain foreign taxes. • **Non-US—**Indicates the invoice contains foreign taxes or any additional type of tax. Save the invoice after you change the **Tax Type**.
For a US tax type	**Tax Rate**	Enter a numeric value for the percentage to be applied to line items. For example, enter 8.25 for an 8.25% tax.
For a Non-US tax type	**Tax Level**	Specify how to apply non-US taxes to the invoice with one of the following options: • **Summary Level—**Allows you to enter taxes for the invoice as a whole. To add summary level taxes, save the invoice with at least one line item associated with a project. • **Line Item Level—**Allows you to enter taxes for individual line items. Save the invoice after you change the **Tax Level**. ***Note:*** *You only have the **Tax Level** option if line item tax details are enabled for your system. To enable line item tax details for Collaborati invoices, contact Mitratech Support. To enable line item tax details for manual invoices, contact your system administrator.*
	Non-US Tax Code	Select a tax code. If you want to select a tax code that is not available, ask your system administrator to add it to the system.
	Project (at the Summary Level)	Select a project. Only projects associated with line items in the invoice appear in this field.
	Amount (at the Summary Level)	Enter the tax amount.
	Tax Rate (at the Line Item	Enter a numeric value for the percentage to be applied to line items. You can enter more than one **Tax Rate**, which you

	Level)	can apply to different line items.
	Action	Click + to add another tax code to the table, and click - to remove a tax code from the invoice.

Invoice Summary Section

Field	Description
Type	The type of invoice. Options are **Fees** or **Expenses**.
Rate x Units	The total cost of the rate multiplied by the number of units.
Discount	The discount if applicable.
Adjustment	The adjustment based on the discount.
Tax	The tax on the amount if applicable.
Amount	The total based on the discount, adjustment, and tax. Click on this link to make an adjustment.

1.7.3.3.1 Timekeeper Rates

When adding a fee line item to an invoice, the name in the timekeeper field corresponds to a contact record. If a rate for the contact is specified under **Invoice Tasks Rate** on the contact's **Rates** page, this rate will automatically populate the invoice line item's **Original Rate** field. For more information, see Setting Contact Rates.

The following conditions apply:

1. If the Contact record > **Rates** Page > **Default Rates** section is specified and the **Invoice Task Rates** section is blank, then the following applies to invoice fee line item rates:
   - In an invoice Line Items section, if the following are true:

     Item Type is **Fee**.

     Timekeeper is the contact with set rate.
   - Then the **Original Rate** field should be automatically populated with the **Default Rate Value** (from Contact record > **Rates** page).
2. If the Contact record > **Rates** Page > **Invoice Task Rates** section specifies a rate, then the following applies to invoice fee line item rates:
   - In an invoice **Line Items** section, if the following are true:

     Item Type is **Fee**.

Line Item **Category** matches the **Task** value (from Contact record > **Rates** page > **Invoice Task Rates** row).

Timekeeper is the contact with set Invoice Task Rate.

Service date falls within the **From-To** date range (from Contact > **Rate** page > **Invoice Task Rates** row).

- Then the **Original Rate** field should be automatically populated with the Invoice Task Rate (from the contact's **Rate** page).

  If the **Default Rate Value** and an **Invoice Task Rate** are both specified, the **Invoice Task Rate** will override the **Default Rate Value**.

1.7.3.3.2 Adding Invoice Line Items

You can add invoice line items on an invoice's **General** page in the **Line Items** section. Line items can be added when creating invoices or editing invoices that have not been submitted for posting. After the invoice is saved, each invoice line item appears as a row in the Line Items section table. In addition, each invoice line item is stored as a separate record.

When creating fee line items

- If the timekeeper's contact record has rates set for specific task categories on the **Rates** page, the appropriate rate is automatically displayed in the **Rate** field when you select a category from the **Category** drop-down list. Inactive categories, if any, are displayed but cannot be selected.
- If the timekeeper has no rate assigned for the task category of the line item, or the rate period does not fall within the service date, the default rate value of the contact is displayed instead.
- You can overwrite the automatically displayed rate if necessary.
- The currency of the timekeeper is disregarded. Only the rate amount from the timekeeper's contact record is displayed automatically, even if the contact's currency is not the same as the invoice.

When creating expense line items

- Depending on system settings, the rate for expense line items may include 2-5 digits after the decimal points. This is useful for rates that use fractions of a cent, such as photocopying at $0.055 per page.
- If you enter values in excess of the specified number of decimal places for expense line items, the value will be rounded. For example, if the system specifies 2 digits after the decimal place and you enter 0.0345, the value will be rounded to 0.03. If you enter 0.0379, it would be rounded to 0.04.
- If you enter values with less than the system setting for the number of decimal places, the value will be padded with zeros. For example, if the system specifies 5 digits after the decimal place and you enter a value such as 0.03, the value will be padded to 0.03000.

For information about adding line items by copying existing line items, see Copying an Invoice Line Item.

Note: *You can enter negative values in* ***Line Item*** *section fields.*

To add invoice line items

1. If it is not already open, open the invoice to which you want to add a new line item or, on the Invoice List page, click the Edit Record icon.
2. On the invoice's **General** page in the **Line Items** section, complete the appropriate fields. See Invoice General Page Line Items Section Field Descriptions for more information.
3. Click **Add** to add the line item to the invoice.
4. Repeat steps 2 and 3 to add additional line items.
5. Select a save option.

Invoice General Page Line Items Section Field Descriptions

Some field descriptions that follow may not display based on system settings and your assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Invoice General Page Line Items Fields

Label	Description
Activity	(optional) If you selected **Fee** from the **Item Type** drop-down list, select the appropriate activity category from this drop-down list.
Adjusted Amount	This field is automatically calculated after a Line Item is adjusted. **Amount** = (**Rate**) x (**Hrs/Units**) - **Discount**
Adjusted Discount	This field automatically displays the Original **Discount** value. You can change the value to adjust the Line Item. For more information, see Adjusting Line Items with Discounts.
Adjusted Rate	This field automatically displays the Original **Rate** value. You can change the value to adjust the Line Item rate.
Adjusted Unit	This field automatically displays the Original **Unit** value. You can change the value to adjust the Line Item hours/units.
Adjustment Total (USD)	(Batch Adjustment only) Displays an automatically calculated value. **Total Adjustment** = Adjusted Amount - Original Amount

Amount	Displays an automatically calculated value after you add a line item. **Amount** = (**Rate** x **Unit**) - **Discount**
Category	• If you selected **Expense** from the **Item Type** drop-down list, then select a corresponding Expense category from this drop-down list. • If you selected **Fee** from the **Item Type** drop-down list, then select a corresponding Task category from this drop-down list. (Inactive categories, if any, are displayed but cannot be selected.)
Comments to Vendor	Enter adjustment notes. You can enter up to 2000 characters, including spaces. ***Note:*** *For CSM invoices, this information will be sent to the vendor.*
Date	Click the Calendar icon or enter the date for the expense or services provided. This field may be pre-populated based on one of the following criteria: • If you are creating a new line item and other line items exist on this invoice, the **Date** field displays the date of the most recently created line item, even if it is blank. • If the invoice doesn't have existing line items, and the invoice has a **Billing Date**, the **Date** field is populated with the invoice's **Billing Start Date**. • If neither of the above criteria applies, the **Date** field displays the invoice date. You can delete and change a pre-populated date.
Description	Additional information.
Discount	Enter a discount to be applied to the original price or rate for the line item. The discount will display as a flat amount.
In House Comments	Notes for internal staff and TeamConnect users. You can enter up to 2000 characters, including spaces.
Item Type	Select either **Fee** or **Expense** to describe the item type.
Non-US Tax Code	Select a tax code from the drop-down list. The tax rate associated with the code applies to the line item. You specify tax rates in the **Header Information** of the invoice.

	Click the button to include additional tax codes. You cannot include the same tax code twice. ***Note:*** *You can only enter taxes for each line item if line item tax details are enabled for your system. To enable line item tax details for Collaborati invoices, contact Mitratech Support. To enable line item tax details for manual invoices, contact your system administrator.*
Project	The project associated with this line item.
Rate	Enter the original rate for services rendered or unit price for an expense. Also see Timekeeper Rates, When creating fee line items, and When creating expense line items for exceptions.
Reason for Adjustment	If you adjusted the original Rate, Unit, or Amount, select a reason from the drop-down list.
Taxable Item	Select this check-box to indicate whether the tax rate information in the **Tax Information** section should apply to the line item. ***Note:*** *This check-box only appears if the invoice has a US tax type.*
Timekeeper	Find and select the contact who performed the service for a Fee line item. If this contact already has a rate defined, the screen refreshes and updates rate field with timekeeper's established rate.
Unit	Enter the number of hours of a service or the number of units for an expense.

1.7.3.3.3 Copying an Invoice Line Item

Creating a new line using an existing line item as a template is recommended when the new line item is very similar to an existing one, and you will not have to change many of the values that are automatically populated.

To copy an invoice line item

1. Search for an invoice and open it.

   The **General** page opens.

2. In the **Line Items** section, **Action** column, click the Copy icon for the line item to copy.
3. Edit the line item as required.
4. Click **Add**.

   The line item is added to the **Line Items** table.
5. Select a Save option.

1.7.3.4 Editing Invoices

Invoice fields that you can edit vary. Contact the TeamConnect Administrator for more information.

Tips and Warnings

- **If the invoice status is Not Posted—**Based on your invoice update rights, all Invoice **Header Information** and Line Items section fields are editable and the **Post** button is available.
- **If an invoice has posted—**You can only edit custom fields if your system allows edits to custom fields after posting. Contact your system administrator to enable this setting. The invoice's system fields are not editable.
- **If the invoice is in a workflow process** (submitted for posting and pending approval)**—**Based on your invoice update rights, all Invoice **Header Information** section fields are editable, the **Invoice Summary** section **Amount** values display as adjustable links, and **Line Items** section fields are not editable.
- **If you upgraded from TeamConnect 2.3 or earlier—**For pre-existing invoices that did not previously require vendor contact information, the invoice vendor field will be populated with the "System user" contact. This is so that invoices will not be voided due to lack of required information.
- **For invoices that are received through Collaborati Spend Management (CSM)—**Only custom fields are editable in the **Invoice Header** section and **Line Items** section. You can also edit the **Comments to Requestor** field.
- **If a Line Item has been adjusted—**You can edit fields except the **Original Rate**, **Original Quantity**, **Original Discount**, and **Original Amount** (total). For invoices that were generated in e-billing tools, system fields are not editable.

To edit an invoice in TeamConnect

1. Search for an invoice and open it.
2. Click **Edit** on the toolbar or click the **Edit** link in the section that you want to update.
3. On the **General** page, edit fields in the **Header Information** section. For more information, see Invoice Header Information Section.

   Note: *The **Invoice Summary** section is read-only during invoice editing. After editing invoice line items, the Invoice Summary section automatically updates with total summaries for line items.*

4. Select a save option.

To edit invoice line items, see Editing Invoice Line Items.

To add invoice line items, see Adding Invoice Line Items.

To delete invoice line items, see Deleting Invoice Line Items.

1.7.3.4.1 Changing the Displayed Currency on an Invoice

If an invoice is submitted in a currency other than your system currency, by default, the invoice's values display in the submitted currency. Matter Management lets you temporarily change the invoice to display all invoice amounts in a different currency.

For example, for an invoice submitted in Pounds (Great Britain), an approver changes the invoice's currency view to US Dollars (USD). As a result, all invoice currency values are displayed in the equivalent USD values. If the approver adjusts the invoice, the adjustment screen displays values in the originally submitted currency (GBP). All Adjustments are applied in GBP as well.

Notes

- If the invoice display is updated to show a currency other than the original currency, when an approver adjusts the invoice, values are displayed and calculated against the originally submitted currency values.
- If the invoice has not posted and you change the view to a different currency, the current exchange rate applies, as specified in your multi-currency table. Contact your Administrator for details.
- If the invoice has posted and you change the view to a different currency, the conversion rate is based on the exchange rate at the time of posting.

To change the displayed currency on an invoice

1. Search for an invoice and open it.
2. Click **Edit**.

   In the **Submitted Currency** drop-down list, select the appropriate type of currency.

   The invoice values are displayed in the selected currency.

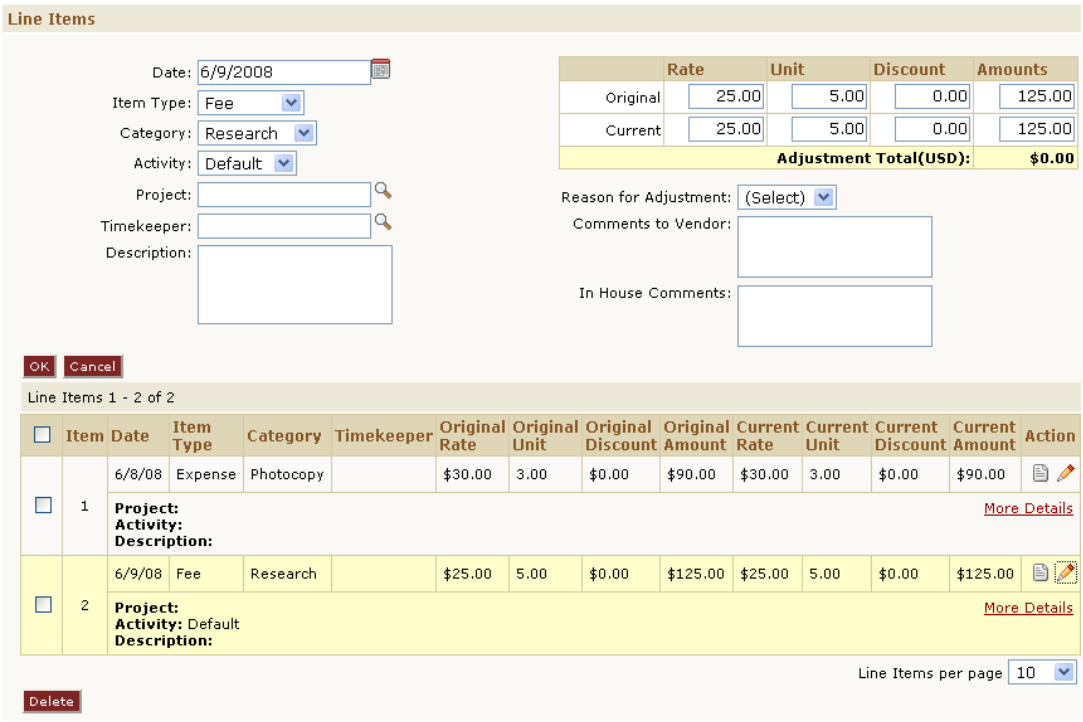
Caution: *If you adjust the invoice Summary or Line Items, adjustment values display and are calculated in the submitted currency values.*

1.7.3.4.2 Editing Invoice Line Items

This procedure describes editing invoice line items from an invoice record. While editing an invoice, you can update existing line items.

To edit an invoice line item

1. Do one of the following:
   - Search for an invoice and open it.
   - Click the **Invoice** tab. On the **Invoice List** page, click the Edit Record icon for an invoice.
2. On the **General** page, **Line Items** section, **Action** column, click the Pencil icon for a line item.



Invoice General Page, Line Items Section--Editing Line Item #2

3. Afterward, you can edit that line item's fields under the **Line Items** section bar. See Invoice General Page Line Items Section Field Descriptions for more information.
4. Click **OK**.
5. Select a Save option.

1.7.3.4.3 Deleting Invoice Line Items

When editing invoices, you may want to delete line items from the invoice.

To delete invoice line items

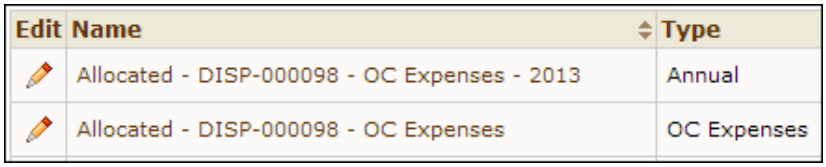
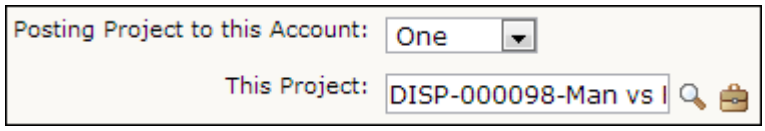
1. Search for an invoice and open it.

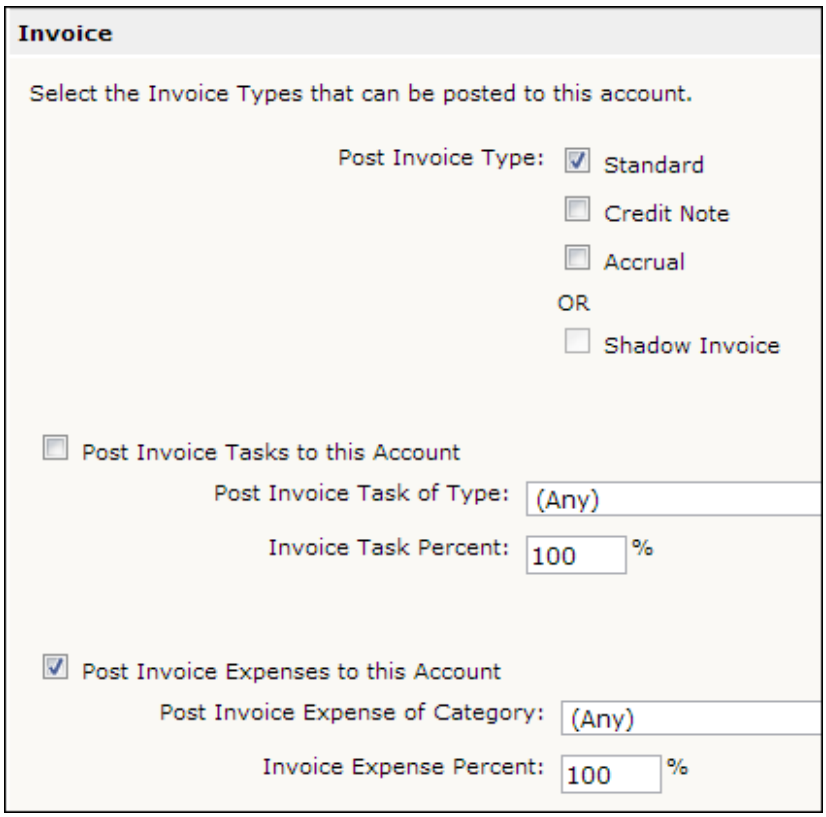
   The **General** page opens.
2. From the **Line Items** section, select the check-box of the line item to delete.

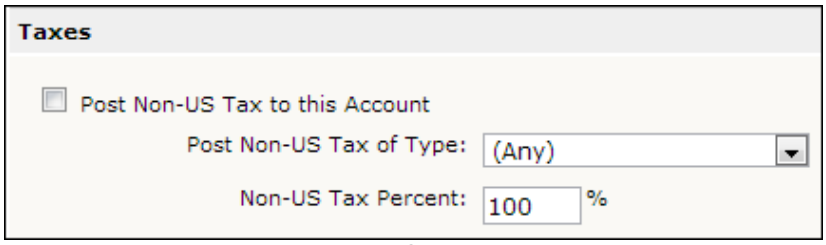
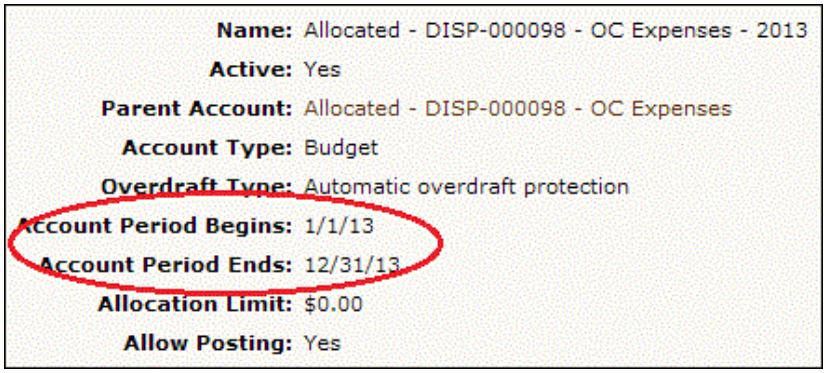
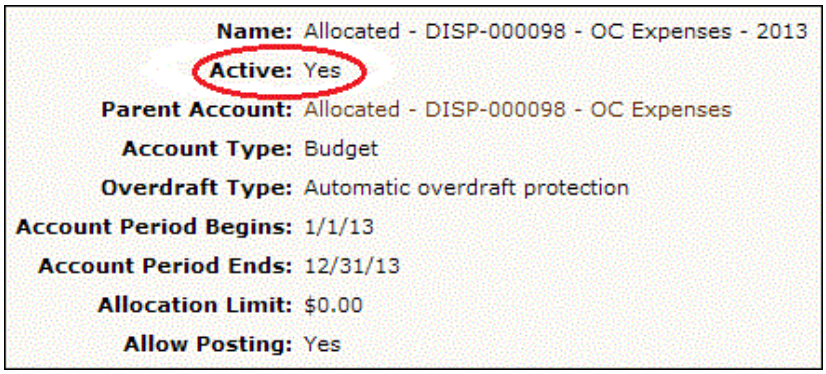
3. Click **Remove**.
4. Select a Save option.

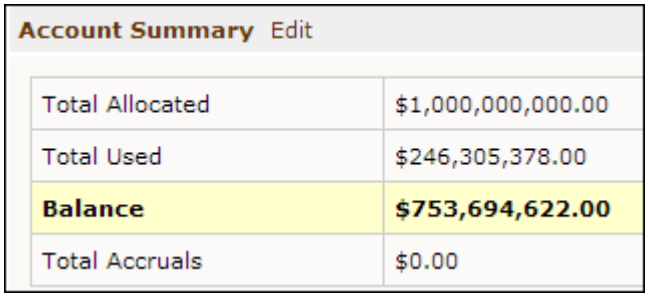
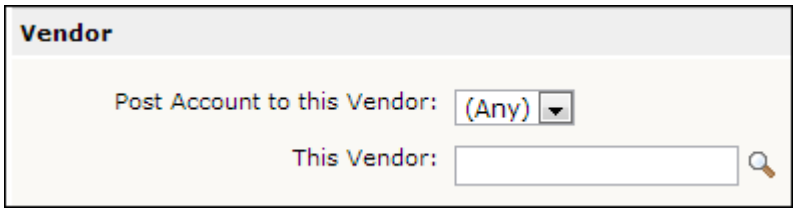
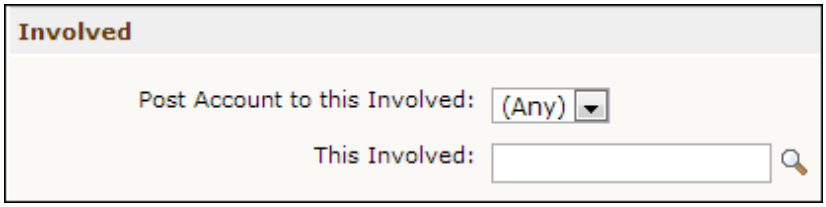
1.7.3.5 Preparing an Invoice for Posting

Before you post an invoice, you must prepare the invoice and its associated account. The following table describes requirements for posting.

Requirement	Description
The invoice must be associated with an account.	From **Accounts**, search for all accounts associated with the project listed on the invoice. This project can be a dispute or other type of matter. If you want to post an invoice to an account, it must be associated with a project. For example, enter DISP-000098 for the name value in the search. Select the account to which you want to post. For example, "Allocated - DISP-00098 - OC Expenses - 2013."  **Selecting Accounts for Posting Invoices** If no accounts exist for the project, create an account and specify the following fields on the **Posting Criteria** page. • **Posting Project to this Account**: Select **One** • **This Project**: Enter the name of the project  **Posting Projects to an Account**
The account must allow posting.	From the **General** page of the account, place a checkmark in the **Allow Posting** check-box if one does not exist. **Allowing Posting to an Account**
The account must allow invoices to be posted.	1. From the **Posting Criteria** page of the account, depending on the type of invoices you want to post, place checkmarks in the **Post Invoice Type** check-boxes if necessary.

	2. Depending on the type of line items you want to post, place checkmarks in the **Post Invoice Tasks** to this Account or **Post Invoice Expenses** to this Account check-boxes if necessary. You can also select both check-boxes. 3. From the **Post Invoice Task of Type** or **Post Invoice Expense of Category** drop-down, update the type of tasks or expenses you want to be able to post. 4. From the **Invoice Task Percent** or **Invoice Expense Percent** field, enter a number for the percentage of the task or expense you want to post. Keep at 100% if you are only posting to one account. Update the percentage if you want to split invoice amounts between multiple accounts.  **Allowing Invoices to Post to an Account**
The account must allow non-US taxes to be posted if the invoice has non-US taxes.	1. From the **Posting Criteria** page of the account, if the invoice has a non-US **Tax Type**, place a checkmark in the **Post Non-US Tax to this Account** check-box if one is not present. 2. From the **Post Non-US Tax of Type** drop-down, update the type of tax you want to be able to post. 3. From the **Non-US Tax Percent** field, enter a number for the percentage of the tax you want to post. Keep at 100% if you are

	only posting to one account. Update the percentage if you want to split tax amounts between multiple accounts.  **Allowing Invoices with a Non-US Tax Type to Post to an Account**
The date of the invoice must be with in the account period.	The **Invoice Date** on the invoice should be within the account period, which can be found on the **General** page of the associated account  **Account Period on the General Page**
The account must be active.	The status of the **Active** field on the **General** page of the account is **Yes**. See Activating or Deactivating Accounts for more information.  **Account Period on the General Page**
The account (or the parent's account) must have a balance of the same amount as the invoice or more.	From the **Account Summary** page of the account, check whether the **Balance** has enough funds to cover the invoice. If the account has no balance, check the **Account Summary** page of the parent account or the parent's parent account. You can continue checking parent accounts until you find a balance. If the balance does not have enough funds, add money to one of the accounts.

	 **Balance on the Account Summary Page**
The invoice must include the same Vendor contact that is on the account.	From the **Posting Criteria** page, if the associated account specifies a **Vendor** contact in the **This Vendor** field, the **Vendor** field of the invoice record must include the same vendor. ***Note:*** *The account does not need to specify a vendor, even if the invoice includes one.*  **Specifying a Vendor for Posting**
The invoice line items must include the same Involved contact that is on the account.	From the **Posting Criteria** page, if the associated account specifies an **Involved** contact in the **This Involved** field, the **Timekeeper** field of each line item in the invoice must include the same contact. ***Note:*** *The account does not need to specify an Involved contact, even if the invoice line items include one*  **Specifying an Involved Contact for Posting**

1.7.3.6 Posting an Invoice

When an invoice posts successfully, TeamConnect debits the budget of accounts associated with the projects associated with line items of an invoice.

Note: *If TeamConnect cannot locate the appropriate budget, invoice posting fails because you may need to associate the line item's of the invoice with the budgets of accounts. See Preparing*

an Invoice for Posting. You can repost the invoice after preparing the invoice for posting correctly.

When posting an invoice unsuccessfully, you might receive the following errors:

- After a user clicks the **Post** button on an invoice, if any line item could not post, the entire invoice will not be posted, and the status of the invoice is changed to Failed.
- If an electronically submitted invoice is approved for Posting, but fails for reasons such as insufficient funds, the **Post** button will show in the invoice and the invoice can be re-posted manually once all errors are resolved.

To post an invoice

1. Search for an invoice and open it.
2. Click **Post**.

Note: *After an invoice posts, you can edit custom fields but you cannot edit system fields.*

The following table explains what can happen after you click the **Post** button.

Workflow process?	All line items able to be posted?	Invoice currency the default currency?	Description
Yes	Yes	Yes	• An **Adjust** button becomes available and the **Posting Status** in the **Header Information** section on the **General** page is marked as **Not Posted** to **Pending Approval**. ***Note:*** *The invoice must be approved by the final approver before an invoice can be posted.*
No	Yes	Yes	• The **Posting Status** in the **Header Information** section on the **General** page is marked as **Posted**. • The **Transactions** page of the invoice and the associated account records updates with the corresponding entries. • The **Void** button becomes available.
No	Yes	No	• The amount on the invoice converts to the default currency and displays on the **Transactions** page of

			the invoice and the account records. • The **Exchange Rate** displays in the **Header Information** section of the **General** page.
Yes	Yes	No	• The exchange rate at the time that the invoice is finally approved is the rate that converts the invoice amounts to the default rate—not the exchange rate when you first attempt to post it.
No	No	Yes	• The entire invoice does not post and an error message informs you which line items have issues. • The **Posting Status** in the **Header Information** section on the **General** page is marked as **Failed** and the **Post** button continues to display. ***Note:*** *If you are unable to post an invoice, review Preparing an Invoice for Posting and attempt to re-post the invoice after making necessary changes.*

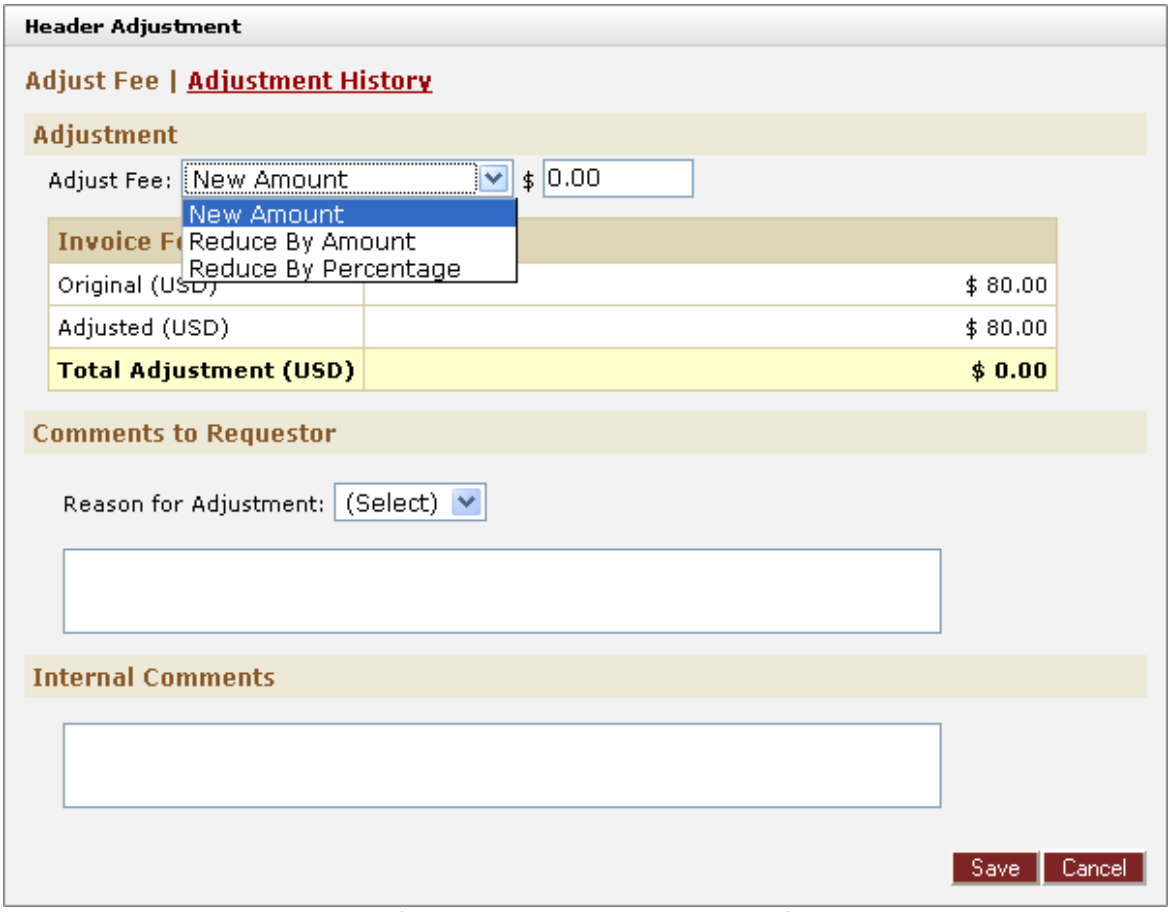
1.7.3.7 Adjusting an Invoice Summary

For invoices that are pending workflow approval, you can adjust the invoice summary values, such as total fees, total expenses, or the total invoice amount.

Note: *You cannot make negative adjustments to the Invoice Summary that result in a final invoice Total (Fees Amount total or Expenses Amount total) that is greater than or equal to the original total Amount. However, you can make negative adjustments to individual Line Items.*

You can adjust the invoice summary values by:

- Adjusting the total Fees. For more information, see Adjusting by Total Fees. See a screenshot example below.
- Reducing the total Expenses. For more information, see Adjusting by Total Expenses.
- Reducing the total invoice amount. For more information, see Adjusting by Total Amount.



Invoice Summary Adjustment - Adjust Fee Screen

Afterward, the adjustment amount is applied proportionally to each line item according to the adjustment type. For example, if you adjust the total Fees, the adjustment amount is applied proportionally to line items of type, Fee.

To adjust an invoice summary by total Fees

1. Search for an invoice and open it.

   The following steps apply to the **Invoice Summary** section.

2. To adjust invoice Fees

   a. In the Invoice Summary section, click the Fees Amount numeric value.

   b. On the Adjust Fee screen, do one of the following:

   - To adjust the **Fees** total to a different amount, from the **Adjust Fee** drop-down list, select **New Amount**. Enter the amount in the field to the right.

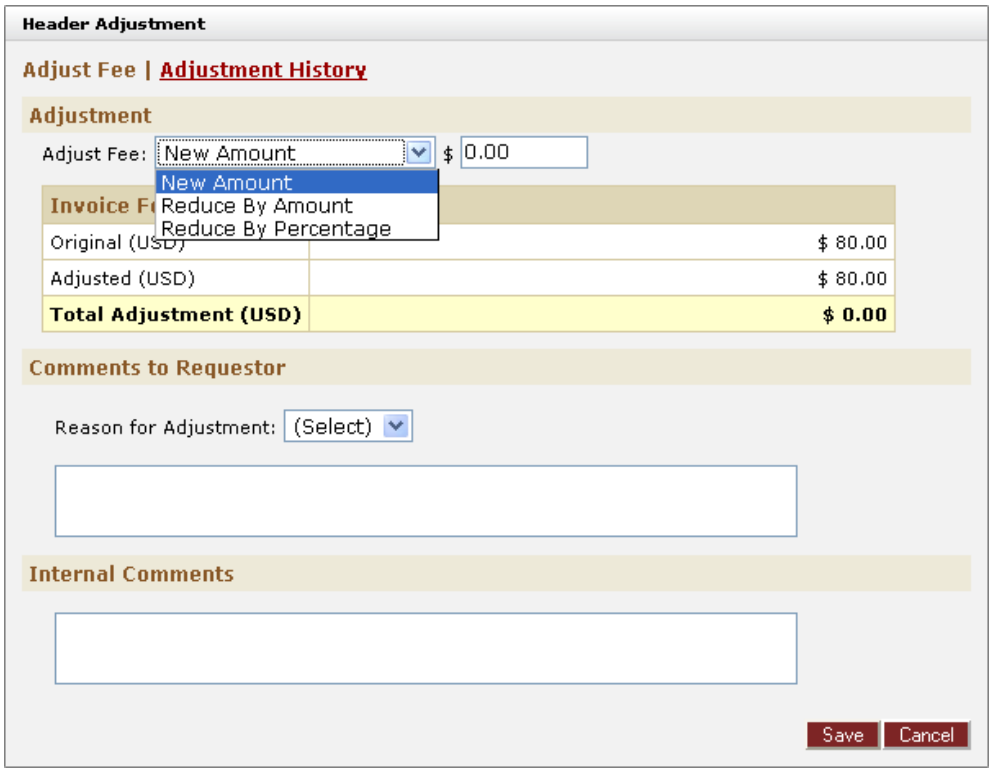
     If you click on the screen, the amount you entered should display in the **Adjusted** row.

- To reduce the **Fees**, from the **Adjust Fee** drop-down list, select **Reduce by Amount**. Enter the amount in the field to the right.

  If you click on the screen, the amount you entered should display in the **Total Adjustment** row.

- To change the **Fees** total amount by a percentage value, from the **Adjust Fee** drop-down list, select **Reduce by Percentage**. Enter the amount in the field to the right.

  If you click on the screen, the **Adjusted** row should display the difference between the Original fee total and the Original fee total * Percentage you entered. For example, if the Original fee total is 100 and the percentage is 10%, the **Adjusted** row displays 90. Also for the example, the **Total Adjustment** would display the Original fee total * Percentage you entered (100*0.10) or 10.



Adjusting by Total Fees

c. The Total Adjustment row should display the difference between the Original and Adjusted fee amounts (Original fee amount - Adjusted fee amount).

d. Select a Reason for Adjustment from the drop-down list.

e. Enter Comments to Vendor (Requestor).

f. Enter Internal Comments.

3. Click **Save**.

To adjust an invoice summary by total Expenses

1. Search for an invoice and open it.

   The following steps apply to the **Invoice Summary** section.

2. To adjust invoice Expenses

   a. From the **Invoice Summary** section, click the Expenses Amount numeric value.

   - To adjust the **Expenses** total to a different amount, from the **Adjust Expense** drop-down list, select **New Amount**. Enter the amount in the field to the right.

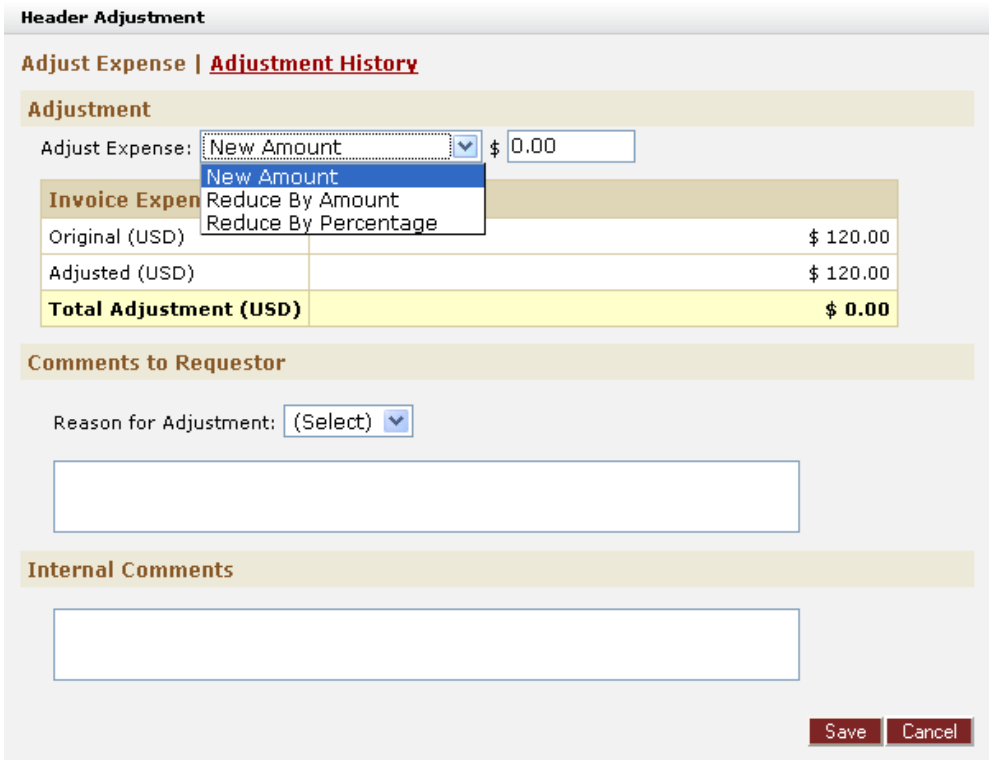
     If you click on the screen, the amount you entered should display in the **Adjusted** row.

   - To reduce the **Expenses**, from the **Adjust Expense** drop-down list, select **Reduce by Amount**. Enter the amount in the field to the right.

     If you click on the screen, the amount you entered should display in the **Total Adjustment** row.

   - To change the **Expenses** total amount by a percentage value, from the **Adjust Expense** drop-down list, select **Reduce by Percentage**. Enter the amount in the field to the right.

     If you click on the screen, the **Adjusted** row should display the difference between the Original expense total and the Original expense total * Percentage you entered. For example, if the Original expense total is 100 and the percentage is 10%, the Adjusted row would display 90. Also for the example, the **Total Adjustment** would display the Original expense total * Percentage you entered (100*0.10) or 10.



Adjusting by Total Expenses

b. The **Total Adjustment** row should display the difference between the Original and Adjusted expense amounts (Original expense amount - Adjusted expense amount).

c. Select a **Reason for Adjustment** from the drop-down list.

d. Enter **Comments to Vendor** (Requestor).

e. Enter **Internal Comments**.

3. Click **Save**.

To adjust an invoice summary by total amount

1. Search for an invoice and open it.

   The following steps apply to the **Invoice Summary** section.

2. To adjust the invoice total Amount:

   a. From the **Invoice Summary** section, click the **Invoice Total Amount** numeric value.

   b. From the Adjust Total screen, do one of the following:

   - To adjust the **Invoice Total** to a different amount, from the **Adjust Total** drop-down list, select **New Amount**. Enter the amount in the field to the right.

     If you click on the screen, the amount you entered should display in the **Adjusted** row.

   - To reduce the **Invoice Total**, from the **Adjust Total** drop-down list, select **Reduce by Amount**. Enter the amount in the field to the right.

     If you click on the screen, the amount you entered should display in the **Total Adjustment** row.

   - To change the **Invoice Total** amount by a percentage value, from the **Adjust Total** drop-down list, select **Reduce by Percentage**. Enter the amount in the field to the right.

     If you click on the screen, the **Adjusted** row should display the difference between the Original Invoice total and the Original Invoice total * Percentage you entered. For example, if the Original Invoice total is 100 and the percentage is 10%, the Adjusted row would display 90. Also for the example, the **Total Adjustment** would display the Original Invoice total * Percentage you entered (100*0.10) or 10.

   c. The **Total Adjustment** row should display the difference between the Original and Adjusted Invoice Total amounts (Original Invoice Total amount - Adjusted Invoice Total amount).

   d. Select a **Reason for Adjustment** from the drop-down list.

   e. Enter **Comments to Vendor** (Requestor).

   f. Enter **Internal Comments**.

3. Click **Save**.

The following field descriptions apply to the all of the Invoice Summary adjustment types (Adjust Fees, Adjust Expenses, and Adjust Total screens).

Invoice Summary Adjustment, Adjust Fee Screen

Label	Description
Adjust Fee	Drop-down list options include: • **New Amount—**If selected, the numeric amount you enter in the field to the right will become the Adjusted (total). • **Reduce by Amount—**If selected, the numeric amount you enter in the field to the right will become the **Total Adjustment** amount. • **Reduce by Percentage—**If selected, the numeric amount you enter in the field to the right will be used to calculate the **Total Adjustment** amount. The Total Adjustment amount will be (the Original Invoice Fee total * Percentage). For example, if you enter 10 in the numeric field, the **Total Adjustment** amount will be (the Original Invoice Fee total * 10%).
Adjustment History	Links to a screen that displays a Invoice Summary adjustment history.
Comments to Requestor	• **Reason for Adjustment—**Drop-down list displays the option, Other, by default. Additional options may be available depending on your system customizations. Contact your TeamConnect administrator for more information. • A text box is available to enter notes to the requestor. You can enter up to 2000 characters, including spaces.
Invoice Fee	The following rows display: • **Original—**The Invoice Summary section, Fees (total) Amount. • **Adjusted—**The amount that the Fees (total) Amount will be adjusted to. • **Total Adjustment—**The difference between the Original and Adjusted amounts (described above).

Invoice Summary Adjustment, Adjust Expense Screen

Label	Description
Adjust Expense	Drop-down list options include: • **New Amount—**If selected, the numeric amount you enter in the field to the right will become the Adjusted (total). • **Reduce by Amount—**If selected, the numeric amount you enter in the field to the right will become the **Total Adjustment** amount.

	• **Reduce by Percentage—**If selected, the numeric amount you enter in the field to the right will be used to calculate the **Total Adjustment** amount. The Total Adjustment amount will be (the Original Invoice Expense total * Percentage). For example, if you enter 10 in the numeric field, the **Total Adjustment** amount will be (the Original Invoice Expense total * 10%).
Adjustment History	Links to a screen that displays a Invoice Summary adjustment history.
Comments to Requestor	• **Reason for Adjustment—**Drop-down list displays the option, Other, by default. Additional options may be available depending on your system customizations. Contact your TeamConnect administrator for more information. • A text box is available to enter notes to the requestor. You can enter up to 2000 characters, including spaces.
Invoice Expense	The following rows display: • **Original—**The Invoice Summary section, Expense (total) Amount. • **Adjusted—**The amount that the Expense (total) Amount will be adjusted to. • **Total Adjustment—**The difference between the Original and Adjusted amounts (described above).

Invoice Summary Adjustment, Adjust Invoice Total Screen

Label	Description
Adjustment History	Links to a screen that displays a Invoice Summary adjustment history.
Adjust Total	Drop-down list options include: • **New Amount—**If selected, the numeric amount you enter in the field to the right will become the Adjusted (total). • **Reduce by Amount—**If selected, the numeric amount you enter in the field to the right will become the **Total Adjustment** amount. • **Reduce by Percentage—**If selected, the numeric amount you enter in the field to the right will be used to calculate the **Total Adjustment** amount. The Total Adjustment amount will be (the Original Invoice Total * Percentage). For example, if you enter 10 in the numeric field, the **Total Adjustment** amount will be (the Original Invoice Total * 10%).

Comments to Requestor	• **Reason for Adjustment—**Drop-down list displays the option, Other, by default. Additional options may be available depending on your system customizations. Contact your TeamConnect administrator for more information. • A text box is available to enter notes to the requestor. You can enter up to 2000 characters, including spaces.
Internal Comments	Notes that display internally but do not display to the requestor (for example, vendor). You can enter up to 2000 characters, including spaces.
Invoice Total	The following rows display: • **Original—**The Invoice Summary section, Invoice Total Amount. • **Adjusted—**The amount that the Invoice Total Amount will be adjusted to. • **Total Adjustment—**The difference between the Original and Adjusted amounts (described above).

1.7.3.8 Adjusting Invoice Line Items

Three procedures for adjusting invoice line items in TeamConnect are available but only one is available for use at a time. The active line item adjustment setting is defined in the TeamConnect Setup screen. For more information on changing the available line item adjustment setting, see Setting up Invoice Line Items Adjustment Behavior.

From an invoice, **Line Items** section bar, if an **Adjust** link displays, then either the Batch Adjustment setting or the In-Line & Bulk Adjustment setting is active. Otherwise, the Detail Adjustment setting is active.

Note: *A line item adjustment is considered an edit to the invoice. The invoice will be locked against other edits until the adjustment is completed.*

Note: *The procedures and fields described in this section may not display based on your rights. If you have questions, contact your TeamConnect administrator.*

Adjusting Line Items with Discounts

The discount always displays as currency value. However, based on system settings, it may be interpreted as either a flat discount, or as a value calculated from a percentage discount.

Important: *During line item adjustments where the original discount was entered as a percentage, the system will automatically adjust the discount amount if the original rate or units are adjusted.*

When adjusting the Invoice Summary or Line Items, the following messages could display at the bottom of the adjustment screen:

Invoice Discount Information Message

Information Message	Description
Original discount was applied as percentage. Discount value is recalculated accordingly if Rate or Hours/Units are adjusted.	This means that in the system settings, Discounts are set to be interpreted as percentage values. The Original Discount value will be used to calculate the discount percentage, and then the same percentage would be applied to the final discount after your adjustments.
Adjustment to amount will be reflected in the discount.	This means that any adjustment to the line item total will display the difference between the new total and the original total as a change in the discount.

Note: *When adjusting Line Items in batch adjustment mode, the messages above display if there is at least one Line Item with a non-zero Original Discount and the Line Item Adjusted Amount has not been manually adjusted.*

To adjust invoice line items (Detail Adjustment)

1. Search for an invoice and open it.
2. To adjust a line item **Rate**:
   a. From the Line Items section, under the Rate column, click the link for the value to adjust.
   b. From the Adjust Rate screen:
      - To adjust the Rate to a different amount, from the **Adjust Rate** drop-down list, select **New Amount**. Enter the amount in the field to the right.

        If you click on the screen, the amount you entered should display in the **Adjusted Rate** table cell.
      - To reduce the Rate, from the **Adjust Rate** drop-down list, select **Reduce by Amount**. Enter the amount in the field to the right.

        If you click on the screen, the following calculation applies. **Adjusted Rate** = **Original Rate** - **Reduce by Amount** value.
      - To change the Rate by a percentage value, from the **Adjust Rate** drop-down list, select **Reduce by Percentage**. Enter the amount in the field to the right.

        If you click on the screen, the following calculation applies. **Adjusted Rate** = **Original Rate** - (**Original Rate***Reduce by Percentage** value/100).
      - Select a **Reason for Adjustment** from the drop-down list.
      - Enter adjustment notes to the vendor in the **Comments to Vendor** field.
      - Enter **Internal Comments** for your company.
3. To adjust a line item **Unit**:

a. From the **Line Items** section, under the **Units** column, click the link for the value to adjust.

b. From the **Adjust Units** screen:

- To adjust the Units to a different amount, from the **Adjust Units** drop-down list, select **New Amount**. Enter the amount in the field to the right.

  If you click on the screen, the amount you entered should display in the **Adjusted Unit** table cell.

- To reduce the Hours or Units, from the **Adjust Hrs/Units** drop-down list, select **Reduce by Amount**. Enter the amount in the field to the right.

  If you click on the screen, the following calculation applies. **Adjusted Unit** = **Original Unit** - **Reduce by Amount** value.

- To change the Hours or Units by a percentage value, from the **Adjust Hrs/Units** drop-down list, select **Reduce by Percentage**. Enter the amount in the field to the right.

  If you click on the screen, the following calculation applies. **Adjusted Unit** = **Original Unit** - (**Original Unit*****Reduce by Percentage** value/100).

- Select a **Reason for Adjustment** from the drop-down list.
- Enter adjustment notes to the vendor in the **Comments to Vendor** field.
- Enter **Internal Comments** for your company.

4. To adjust a line item total **Amount**:

a. From the **Line Items** section, under the **Amount** column, click the link for the value to adjust.

b. From the **Adjust Amount** screen:

- To adjust the total Amount to a different value, from the **Adjust Amount** drop-down list, select **New Amount**. Enter the amount in the field to the right.

  If you click on the screen, the amount you entered should display in the **Adjusted Amount** table cell.

- To reduce the total Amount, from the **Adjust Amount** drop-down list, select **Reduce by Amount**. Enter the amount in the field to the right.

  If you click on the screen, the following calculation applies. **Adjusted Amount** = **Original Amount** - **Reduce by Amount** value.

- To change the total Amount by a percentage value, from the **Adjust Amount** drop-down list, select **Reduce by Percentage**. Enter the amount in the field to the right.

  If you click on the screen, the following calculation applies. **Adjusted Amount** = **Original Amount** - (**Original Amount*****Reduce by Percentage** value/100).

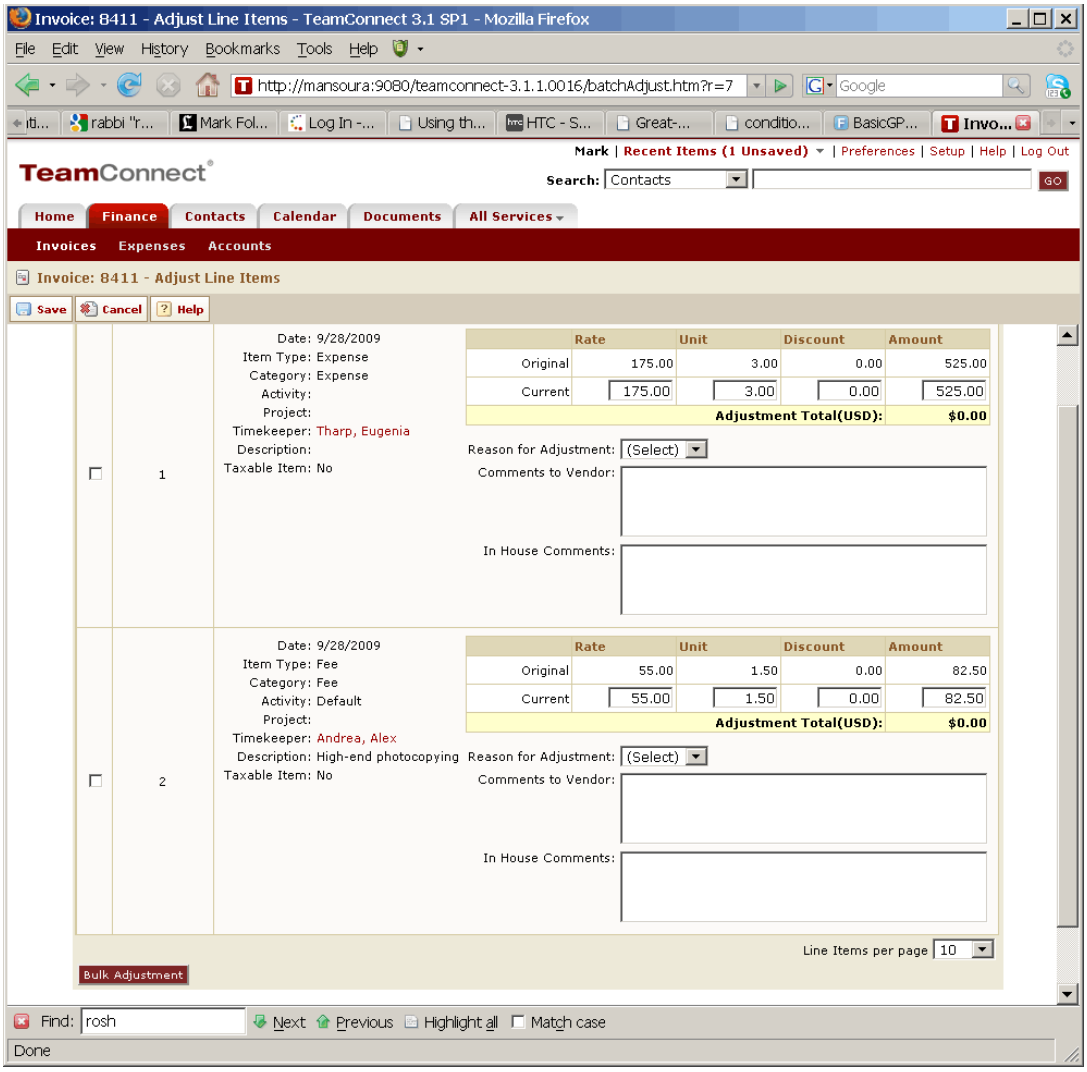
- Select a **Reason for Adjustment** from the drop-down list.
- Enter adjustment notes to the vendor in the **Comments to Vendor** field.
- Enter **Internal Comments** for your company.

5. Click **Save**. The list of invoice line items appear. The line item that you were working on is visible and has a focus frame around it.

To adjust invoice line items (Batch Adjustment)

This procedure allows you to perform adjustments on a list of line items in a batch, using different types of adjustments. If instead you wish to apply a single adjustment type to multiple line items, you can use Bulk Adjustment.

1. Search for an invoice and open it.
2. Use Line Item Search by clicking **Show Filter** to locate and display the particular items that need adjustment.
3. From the **Line Items** section bar, click the **Adjust** link. The adjustment window is displayed.



The Batch Adjustment Window for Line Items (2 Items Shown)

4. If the invoice contains a large number of line items, there will be multiple pages, each containing several line items. You can control the number of line items per page by changing the value in the **Line Items per page** drop-down list. For each line item to adjust:
    - Edit the **Current Rate**
    - Edit the **Current Unit**
    - Edit the **Current Discount**
    - Edit the **Current Amount**
    - Select an **Adjustment Reason** from the drop-down list.
    - Type adjustment explanations to the vendor in the **Comments to Vendor** field.
    - Type **Internal Comments** for your company but not for the Vendor to view.
5. Click **Save**.

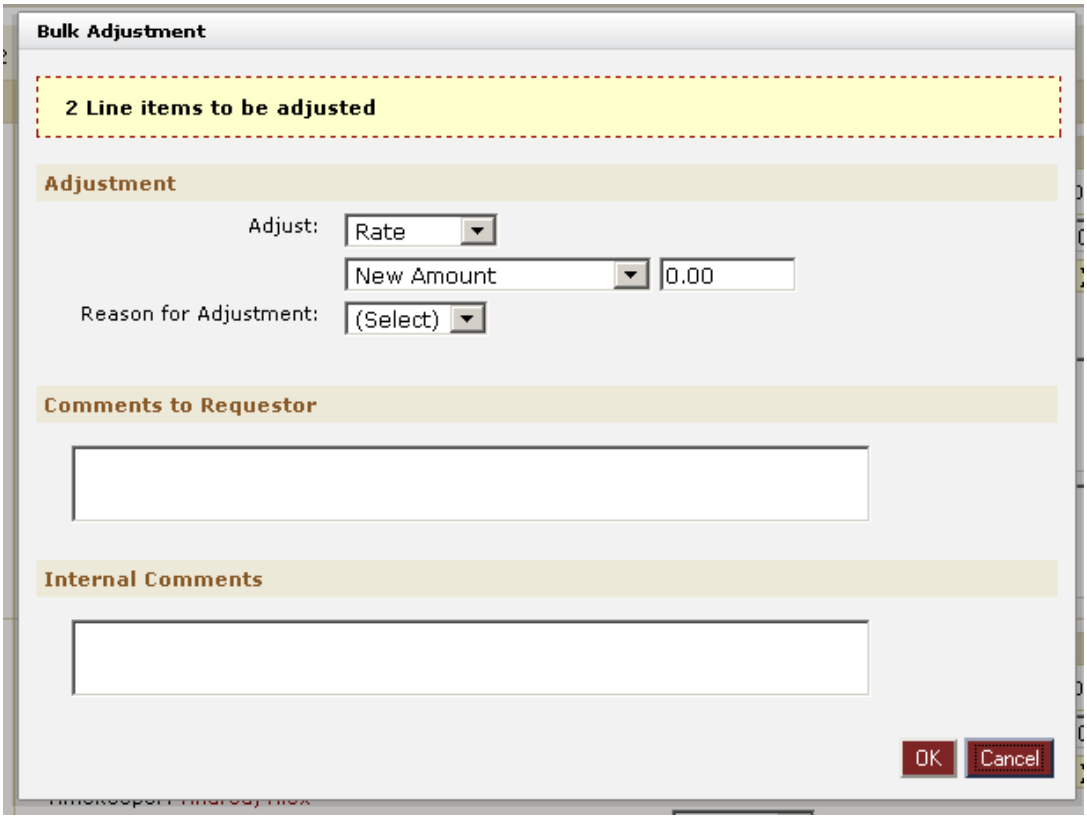
To adjust invoice line items (In-Line & Bulk Adjustment)

This procedure allows you to perform adjustments on a list of line items in a batch, using different types of adjustments. If instead you wish to apply a single adjustment type to multiple line items, you can use Bulk Adjustment.

1. Search for an invoice and open it.
2. Use Line Item Search by clicking **Show Filter** to locate and display the particular items that need adjustment.
3. From the **Line Items** section bar, click the **Adjust** link. The adjustment window is displayed.
4. A list of the line items displays in an embedded box. This is so the column headers of the line items are visible even as you scroll down to view the items on the bottom of the list. For each line item to adjust:
    - Edit the **Current Rate**
    - Edit the **Current Units**
    - Edit the **Current Discount**
    - Edit the **Current Total**
    - Click the **Comments** drop-down menu to open a pop-up in which you can add the following items:
        - **Reason for Adjustment** from the drop-down list.
        - Adjustment explanations to the vendor in the **Comments to Vendor** field.
        - **In House Comments** visible to your company but not to the Vendor.
5. Click **Save**.

To adjust invoice line items (Bulk Adjustment)

1. Search for an invoice and open it.
2. Use Line Item Search to locate and display the particular items that need adjustment.
3. From the **Line Items** section bar, click the **Adjust** link. This link appears if the invoice line item adjustment setting is set to either Batch Adjustment or In-Line & Bulk Adjustment.
4. Click the check-box for all of the line items that will be affected by the bulk adjustment.
5. Click the **Bulk Adjustment** button. The Bulk Adjustment window is displayed.



The Bulk Adjustment Window for Line Items

6. Complete the appropriate fields. The fields are a subset of those used in Batch Adjustment or In-Line & Bulk Adjustment, and vary depending on which setting is active. The fields behave in the same way as when used in their respective in-line adjustment setting. See the Batch Adjustment and In-Line & Bulk Adjustment Line Items fields table.
7. Click **OK**.

   The adjustments are applied to the line items that you checked.
8. Select a save option to save the changes.

(Detail Adjustment) Line Items Field Descriptions

The following field descriptions apply to screens that display when adjusting Line Items section with the Detail Adjustment setting (Adjust Rate, Adjust Unit, Adjust Amount screens). Some field descriptions that follow may not display based on system settings and your assigned rights.

Field descriptions are listed in alphabetical order and may display in a different order in the application.

(Detail Adjustment) Invoice Line Item, Adjust Rate Screen

Label	Description
Adjust Rate	Drop-down list options include: • **New Amount—**If selected, the numeric amount you enter in the field to the right will become the Adjusted Rate. • **Reduce by Amount—**If selected, the numeric amount you enter in the field to the right will be applied in the following calculation: **Adjusted Rate** = **Original Rate** - **Reduce by Amount** value. • **Reduce by Percentage—**If selected, the numeric amount you enter in the field to the right will be applied in the following calculation: **Adjusted Rate** = **Original Rate** - (**Original Rate***Reduce by Percentage value/100). For example, if you enter 10 in the numeric field and the **Original Rate** is 50, the **Adjusted Rate** = 50 - (50*0.10) = 45
Adjustment History	Links to a screen that displays a Invoice Line Item adjustment history.
Comments to Requestor	• **Reason for Adjustment—**Drop-down list displays the option, Other, by default. Additional options may be available depending on your system customizations. Contact your TeamConnect administrator for more information. • A text box is available to enter notes to the requestor. You can enter up to 2000 characters, including spaces.
Internal Comments	Notes that should only be read by other approvers and TeamConnect users. You can enter up to 2000 characters, including spaces.
Line Item table	The following display: • **Original row—**Original values entered for the line item, including Original Rate, Original Unit, Original Discount. Original Amounts = Original Rate * Original Unit - Original Discount • **Adjusted row—**Reflects adjustments to the rate. Original Rate, Original Unit, Original Discount. Adjusted Amounts = Adjusted Rate * Adjusted Unit - Adjusted Discount • **Total Adjustment—**The difference between the Original and Adjusted amounts (described above).

(Detail Adjustment) Invoice Line Item, Adjust Unit Screen

Label	Description

Adjust Unit	Drop-down list options include: • **New Amount—**If selected, the numeric amount you enter in the field to the right will become the Adjusted Unit. • **Reduce by Amount—**If selected, the numeric amount you enter in the field to the right will be applied in the following calculation: **Adjusted Unit** = **Original Unit** - **Reduce by Amount** value. • **Reduce by Percentage—**If selected, the numeric amount you enter in the field to the right will be applied in the following calculation: **Adjusted Unit** = **Original Unit** - (**Original Unit***Reduce by Percentage value/100). For example, if you enter 10 in the numeric field and the **Original Unit** is 50, the **Adjusted Unit** = 50 - (50*0.10) = 45
Adjustment History	Links to a screen that displays a Invoice Line Item adjustment history.
Comments to Requestor	• **Reason for Adjustment—**Drop-down list displays the option, Other, by default. Additional options may be available depending on your system customizations. Contact your TeamConnect administrator for more information. • A text box is available to enter notes to the requestor. You can enter up to 2000 characters, including spaces.
Internal Comments	Notes that should only be read by other approvers and TeamConnect users. You can enter up to 2000 characters, including spaces.
Line Item table	The following display: • **Original row—**Original values entered for the line item, including Original Rate, Original Unit, Original Discount. Original Amounts = Original Rate * Original Unit - Original Discount • **Adjusted row—**Reflects adjustments to the rate. Original Rate, Original Unit, Original Discount. Adjusted Amounts = Adjusted Rate * Adjusted Unit - Adjusted Discount • **Total Adjustment—**The difference between the Original and Adjusted amounts (described above).

(Detail Adjustment) Invoice Line Item, Adjust Amount Screen

Label	Description
Adjust Amount	Drop-down list options include: • **New Amount—**If selected, the numeric amount you enter in the field to the right will become the Adjusted Amount.

	• **Reduce by Amount—**If selected, the numeric amount you enter in the field to the right will be applied in the following calculation: **Adjusted Amount** = **Original Amount** - **Reduce by Amount** value. • **Reduce by Percentage—**If selected, the numeric amount you enter in the field to the right will be applied in the following calculation: **Adjusted Amount** = **Original Amount** - (**Original Amount*****Reduce by Percentage** value/100). For example, if you enter 10 in the numeric field and the **Original Amount** is 50, the **Adjusted Amount** = 50 - (50*0.10) = 45
Adjustment History	Links to a screen that displays a Invoice Line Item adjustment history.
Comments to Requestor	• **Reason for Adjustment—**Drop-down list displays the option, Other, by default. Additional options may be available depending on your system customizations. Contact your TeamConnect administrator for more information. • A text box is available to enter notes to the requestor. You can enter up to 2000 characters, including spaces.
Internal Comments	Notes that should only be read by other approvers and TeamConnect users. You can enter up to 2000 characters, including spaces.
Line Item table	The following display: • **Original row—**Original values entered for the line item, including Original Rate, Original Unit, Original Discount. Original Amounts = Original Rate + Original Unit + Original Discount • **Adjusted row—**Reflects adjustments to the rate. Original Rate, Original Unit, Original Discount. Adjusted Amounts = Adjusted Rate + Adjusted Unit + Adjusted Discount • **Total Adjustment—**The difference between the Original and Adjusted amounts (described above).

(Batch Adjustment and In-Line & Bulk Adjustment) Line Items Section Field Descriptions

The following field descriptions apply to the screen for adjusting the Line Items section with the Batch Adjustment and In-Line & Bulk Adjustment setting. Some field descriptions that follow may not display based on system settings and your assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Line Item Screen

Label	Description

Activity	For Fee line items, displays an activity category.
Adjustment Total	Displays any adjustments made to the line item.
Category	Displays the category associated with the Line Item type (Task/Fee Category or Expense Category).
Comments to Vendor	Enter adjustment notes. ***Note:*** *For Collaborati Spend Management invoices (sent from Collaborati), this information will be sent to the vendor. You can enter up to 2000 characters, including spaces.*
Current Amount	This amount is automatically calculated when you add the line item: **Amount** = (**Rate**) x (**Hrs**/**Units**) - **Discount**. Displays the total for a Line Item.
Current Discount	Displays the discount amount. The discount will display as a flat amount.
Current Rate	Displays the hourly rate for a billed task or per unit cost for an expense.
Current Unit	Displays the number of hours for fee items or units for expense items.
Date	Displays the date on which the services were provided or expenses were incurred.
Description	Displays the line item description.
In-house Comments	Notes that should only be read by other approvers and TeamConnect users. You can enter up to 2000 characters, including spaces.
Item Type	Displays either Fee or Expense for the line item type.
Original Amount	Displays an automatically calculated value after you add a line item. **Amount** = (**Rate** x **Unit**) - **Discount**
Original Discount	Displays the discount to be applied to the original price or rate for the line item. The discount will display as a flat amount.
Original Rate	Displays the original rate for services rendered or unit price for an expense.

Original Unit	Displays the number of hours of a service or the number of units for an expense.
Reason for Adjustment	Select an option from the drop-down list.
Taxable Item	Displays Yes or No.
Timekeeper	Displays the Timekeeper or contact who performed the services.

1.7.3.9 Line Item General

The following links provide detail on adding, customizing, and configuring invoice line items:

Invoice Overview

Adjusting Invoice Line Items

Adding Invoice Line Items

Setting up General Invoice Line Items Behavior

1.7.3.10 Approving Invoices

This topic applies if an invoice is in a workflow process only. You can approve invoices in a batch (from an Approvals list).

My Approvals Area, Requests to Approve Page

To approve invoices in a batch

1. To access the My Approvals page, do one of the following:
   - Click one of the hyperlinks in your My Approvals portal pane on your home page.

- Select **Approvals** from the **All** tab.

  The **My Approvals** screen opens with the **Requests to Approve** tab showing.

2. Select the check-box(es) next to the record(s) you wish to approve.
3. Click **Approve**. The Invoice status changes from **Not Posted** to **Posted**, or the invoice will go to the next approver, depending on the workflow settings.

The approval history record is recorded on the **Workflow** page of the invoice. All other requests for review or other workflow related events are recorded on the **Workflow** page as well.

To approve an individual invoice

1. Search for an invoice and open it.
2. From the top of the page, click **Approve**.
3. From the **Confirm Approval** screen, you can enter **Internal Comments**.
4. Click **Confirm Approval**.

1.7.3.10.1 Rejecting Invoices

This topic applies if an invoice is in a workflow process only. You can reject invoices from an Approvals summary list or from an invoice record.

My Approvals Area, Requests to Approve Page

To reject an invoice (from Approvals)

1. To access the **My Approvals** page, do one of the following:
   - Click one of the hyperlinks in your **My Approvals** portal pane on your home page.
   - Select **Approvals** from the All tab.

     The **My Approvals** screen opens with the **Requests to Approve** tab showing.

2. Select the check-box next to the record you wish to reject.
3. Enter a reason for the rejection in the **Internal Comment** field.
4. Click **Reject**. A confirmation pop-up opens.
5. Select a **Rejection Reason**. The list of reasons is determined by your TeamConnect administrator.
6. Enter comments in the **Comment to Requestor** field.

   If you select a **Rejection Reason** option other than **Default**, on the invoice's **General** tab, the **Comment to Requestor** box will contain both the selected **Rejection Reason** option and the **Comment to Requestor** from the **My Approvals** - **Reject Invoice** screen.

   For example, if the "Reason for Reject" is "Invoice contains multiple violations" and "Comments to Requestor" is "Too many billing guidelines violation, including line items 2-10. Please resubmit per discussion", then the "Comments to Requestor" of the Invoice will show the following:

   Invoice contains multiple violations.

   Too many billing guidelines violation, including line items 2-10. Please resubmit per discussion.
7. Click **Confirm Rejection**. The invoice status changes from Not Posted to Rejected.

   The approval history record is recorded on the **Workflow** tab. All other requests for review or other workflow related events are recorded here as well.

To reject an invoice (from invoice record)

1. Search for an invoice and open it.
2. From the top of the page, click **Reject**.
3. From the **Confirm Rejection** screen, you can:
   - Select the **Rejection Reason** from the drop-down list.
   - Enter comments in the **Comment to Requestor** field.
4. Click **Confirm Rejection**.

   If you select a **Rejection Reason** option other than **Default**, the resulting invoice, **General** page, the **Comment to Requestor** field will contain the selected **Rejection Reason** option and the **Comment to Requestor** from the **My Approvals** - **Reject Invoice** screen.

   For example, if the "Reason for Reject" is "Invoice contains multiple violations" and "Comments to Requestor" is "Too many billing guidelines violation, including line items 2-10. Please resubmit per discussion", then the "Comments to Requestor" of the Invoice will show:

   Invoice contains multiple violations.

   Too many billing guidelines violation, including line items 2-10. Please resubmit per discussion.

5. Click **Confirm Rejection**. The invoice status changes from **Not Posted** to **Rejected**.

1.7.3.10.2 Sending an Invoice for Review

Depending on system configuration and your user rights, you may have the ability to send approval requests for review to other users.

When you send an invoice for review, the time allotted for you to approve or reject the request is not paused; it continues to run while the invoice is in review. As the approver, you have the option to approve or reject the invoice before it is reviewed. The review simply allows someone who may be more familiar with the project to evaluate and make comments about the invoice.

Invoice Review Requests can be forwarded in batch using the Approvals summary list, or individually using an invoice record.

To send a batch of invoices for review

1. To access the **My Approvals** page, do one of the following:
   - Click one of the hyperlinks in your **My Approvals** portal pane on your home page.
   - Select **Approvals** from the **All** tab.

     The **Requests to Approve** tab of the **My Approvals** screen is displayed.
2. Select the check-box next to the record you want to send for review.
3. Click **Send for Review**.

   (Optional) Enter a comment in the **Internal Comment** box.

   A pop-up prompts you to specify the user who should review the invoice.
4. Make your selection and click Yes.

   The **My Approvals** screen will update and state that you forwarded the invoice to another user for review.

   The reviewer will see the request for review on his or her home page under **My Approvals**, **Requests to Review** tab. The reviewer does not need to post a review in order for you to approve or reject the invoice.

   The reviewer's comments will be stored in the Approval History for the invoice, and in the **Workflow** tab.
5. From the **My Approvals** screen, click the invoice record. Under the **Approval History** of **Active Requests** on the **Workflow** page, you will see the reviewers comments.
6. Make your approval or rejection selection, or send to another user for review.

Note: *You can send the same invoice for review to multiple users.*

To send an invoice for review (from an invoice)

1. Search for an invoice and open it.
2. From the top of the page, click **Send for Review**.
3. From the **Send for Review** screen, you can:
   - Select the **Recipient Type** (User or Group).
   - Select the **Recipient** from the drop-down list.
   - Enter an **Internal Comment**.
4. Click **Send**.

1.7.3.10.3 Reviewing an Invoice

Depending on your role in the organization, and how approval processes are defined, you may receive requests to review invoices that are pending approval.

To review an invoice

1. To access the **My Approvals** page, do one of the following:
   - Click one of the hyperlinks in your **My Approvals** portal pane on your home page.
   - Select **Approvals** from the **All** tab.
   - The **My Approvals** screen opens with the **Requests to Approve** tab displayed.
2. Click the **Requests to Review** link from the left pane.
3. Click **Submit Review** on the invoice record row you wish to review.

   Enter notes in the **Comment to Requester** field. These comments will be stored in the Approval History for the invoice and on the **Workflow** page.
4. Click **Submit**. The comments will be submitted to the approver.

   Alternatively, on the **My Approvals** screen, select the check-box for the record your reviewed, enter any comments in the **Comment** field, and click **submit review**.

Note: *The approver has the option to make a decision about the invoice status before the request expires. If the approver makes a decision before you have submitted comments, your request for review will automatically be removed from your pending requests.*

1.7.3.11 Voiding an Invoice

After an invoice has been posted, you can void it.

To void an invoice transaction

1. Search for an invoice and open it.

2. Click **Void**.

What Happens After You Click Void (no workflow)

The following changes occur when you void an invoice.

- The **Post** button becomes available. The invoice can be posted again if necessary.
- The **Posting Status** changes to **Not Posted** in the **Header Information** section on the **General** page.
- The transaction listed on the **Transactions** page, indicating the posting of the invoice, is removed and replaced with a **Voided** transaction.
- The change in balance is reflected in the **Balance** field in the **Account Summary** section of the **General** page in the corresponding account(s).

What Happens After You Click Void (with workflow)

- The **Posting Status** changes to **Pending Approval** in the **Header Information** section on the **General** tab.

  Important: *If there is an approval process in place for voiding invoices, NONE of the following items occur until the invoice void is approved by the final individual who must approve it.*

- The **Post** button becomes available. The invoice can be posted again if necessary.
- The **Posting Status** changes to **Not Posted** in the **Header Information** section on the **General** page.
- The transaction listed on the **Transactions** page, indicating the posting of the invoice, is removed and replaced with a **Voided** transaction.
- The change in balance is reflected in the **Balance** field in the **Account Summary** section of the **General** page in the corresponding account(s).

Voiding Invoices in Other Currencies

To void an invoice that is in a different currency from the default currency, follow the same procedure, and the resulting changes described in the What Happens After You Click Void (no workflow) section still apply.

In addition, the following points are important to remember:

- The amount that was posted is the amount that is voided, regardless of the current exchange rate.
- When you void and then re-post an invoice that is in a different currency than the default currency, the second posting uses the most current exchange rate, which may have changed since the first time the invoice was posted. Therefore, the posted amount may be different.

1.7.3.12 Using the Invoice Summary Breakdowns Page

Use the **Summary Breakdowns** page to view a summary of line items for the selected invoice. You can view summary information in the following ways:

- **By Timekeeper—**View a summary of invoice line items that are in the Fee category and are assigned to a specific timekeeper.
- **By Fee/Expense Category**—View a summary breakdown of invoices grouped by fee or expense category.

You can also use this page to perform adjustments. See Adjusting an Invoice Summary for more information.

To view breakdowns by timekeeper

1. Search for an invoice and open it.
2. In the left pane, click **Summary Breakdowns**.
3. At the top of the page, click **By Timekeeper**. The timekeeper summary breakdown information is displayed as follows:
   - All Matters—Lists all timekeepers who are assigned to any matter associated with this invoice, along with their related totals. This section only appears if this is a multi-matter invoice.
   - Individual Matters—Lists each timekeeper under the matter to which they are assigned, along with their related totals.

     See Summary Breakdowns Field Descriptions for specific information about the information in each column.

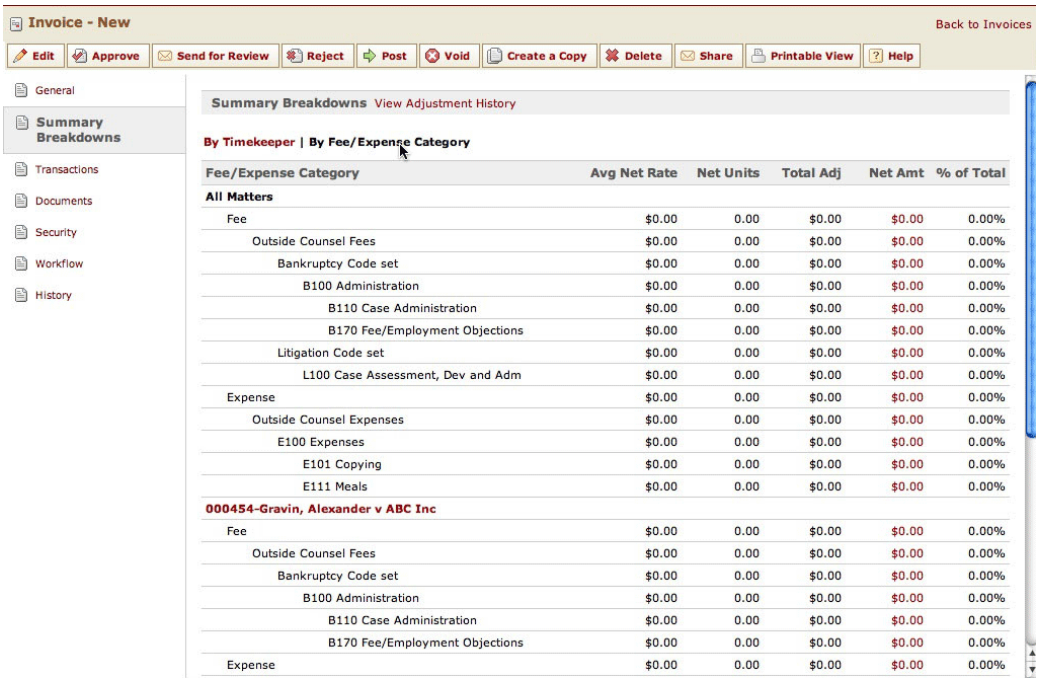
Summary Breakdowns Page - By Timekeeper

To view invoice summary breakdowns by fee or expense category

1. Search for an invoice and open it.
2. In the left pane, click **Summary Breakdowns**.
3. At the top of the page, click **By Fee/Expense Category**. The Fee/Expense summary breakdown information is displayed as follows:

- All Matters—Lists all fees and/or expense line items for any matter associated with this invoice, along with their related totals. This section only appears if this is a multi-matter invoice.
- Individual Matters—Lists each fee and/or expense category under its associated matter in a hierarchical representation that includes its associated line items and totals.

  See Summary Breakdowns Field Descriptions for specific information about the information in each column.



Summary Breakdowns Page - By Fee/Expense Category

Summary Breakdowns Field Descriptions

The following field descriptions apply to the **Summary Breakdowns** screen for both the **By Timekeeper** and **By Fee/Expense Category** options. Some field descriptions that follow may not display based on system settings and your assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Summary Breakdowns Fields

Label	Description
% of Total Fees	• **By Timekeeper** only: The percent ratio of the Net Amount of this row to the Total Net Fee amount for this invoice. (% = Net Amount:Total Net Fee)
% of Total	• **By Fee/Expense Category** only: Percent ratio of the Net Amount of this row to the Total Net Amount for this invoice.

Avg Net Rate	• **By Timekeeper**: The average of the Original Rate of the grouped line items for this timekeeper. • **By Fee/Expense Category**: The average of the Original Rate of the grouped line items for this category. For an Expense category, appropriate decimal places are displayed.
Net Amt	• **By Timekeeper**: The sum of the total amounts of the grouped line items for this timekeeper. The tax amount is excluded. • **By Fee/Expense Category**: The sum of the total amounts of the grouped line items for this category. The tax amount is excluded.
Net Discount	• **By Timekeeper**: The total of all of the Original Discounts of the grouped line items for this timekeeper. • **By Fee/Expense Category**: Total of the Original Discounts of the grouped line items for this category.
Net Units	• **By Timekeeper**: The total of the Original Units of the grouped line items for this timekeeper. • **By Fee/Expense Category**: The total of the Original Units of the grouped line items for this category.
Total Adj	• **By Timekeeper**: The sum of the adjustments of the grouped line items for this timekeeper. • **By Fee/Expense Category**: The sum of the adjustments of the grouped line items for this category.

1.7.3.12.1 Adjusting Net Amounts on the Summary Breakdowns Page

Use the **Summary Breakdowns** page to adjust the net amount for specific timekeepers or categories. Once you make an adjustment, it is distributed across the affected line items.

For example, on the **By Timekeeper** page, on Invoice A, the total amount of the fee line items for Timekeeper Dave is $1,000.00. If you adjust the amount to $800.00, and then save this information, the adjusted amount of $200.00 is distributed across the fee line items that apply to timekeeper Dave based on the ratio of each line item amount over the total fee amount prior to the adjustment.

If there are expense line items that also apply to Timekeeper Dave, they are not affected, because the adjustment is made on Fee line items only.

To adjust net amounts

1. Search for an invoice and open it.
2. In the left pane, click **Summary Breakdowns**.
3. At the top of the page, click **By Fee/Expense Category** or **By Timekeeper**.

4. In the **Net Amount** column, click the amount that you want to adjust.

   An Adjustment window opens.

5. Enter the appropriate adjustments and information, and then click **Save**. See Adjusting an Invoice Summary for specific information.

   The adjustment is distributed across affected line items.

1.7.3.13 Viewing and Creating History for an Invoice

Use an invoice's **History** page to create a history (containing notes about changes to the invoice), view a list of history records for that invoice, or perform an advanced search for a history.

For more information, see Working with Record History.

1.7.3.13.1 Viewing Invoice Summary Adjustment History

You can view a history of Invoice Summary adjustments. For each adjustment, the following information displays:

- The adjustor's name
- Descriptions of the adjustments made
- Adjustment date

To view an invoice summary adjustment history

1. Search for an invoice and open it.
2. From the **Invoice Summary** section, under the **Amount** column, click a numeric value link.
3. From the resulting adjustment screen, click **Adjustment History**.
4. The resulting **Invoice Adjustment History** screen displays the adjustor name, adjustment type, adjustment amount, and date of adjustment.
5. Click the **Cancel** button to return to the invoice **General** page.

1.7.3.13.2 Viewing Line Item Adjustment History

Within each invoice, you will find a history of any invoice adjustments and line item adjustments. For each adjustment, the following information displays:

- Adjustment dates
- The user who made the adjustment
- Descriptions of the numeric adjustments made
- In-house comments
- Adjustment reasons

- Comments to vendor

To view an invoice line item's adjustment history

1. Search for an invoice and open it.
2. From the **Line Items** section, under the **Item** column, click an item number link.
3. From the line item record left pane, click the **Adjustment History** link.
4. A history of that line item's adjustments displays.

1.7.3.13.3 Viewing Invoice Transactions History

Posted invoice line item amounts are recorded on the corresponding **Transactions** page of the invoice. Transactions are displayed in the default currency, regardless of the currency of the invoice.

You cannot delete or modify invoice transactions on the **Transactions** page. If changes are necessary, you must void the invoice, modify the invoice line items, and post the invoice again.

For more information on invoice transactions, see Posting an Invoice, Voiding an Invoice, and Setting Transaction Posting Criteria.

To view invoice transactions

1. Search for an invoice and open it.
2. In the left pane, click **Transactions**.
3. View the transaction records.

1.7.3.13.4 Viewing Invoice Workflow

You can view information about an invoice's posting status from both the General page and Workflow page.

- From an invoice's **General** page, the workflow status of an invoice displays at the top.
- From an invoice's **Workflow** page, you can view information about an invoice's active and past approval processes.
  - From the **Active Requests** section, you can find the approver(s) for an action that is pending approval.
  - From the **Completed Requests** section, you can review the history of approvals, rejections, and canceled approval processes for the invoice.

The table below describes the possible invoice statuses and related adjustment options. Manual Invoice refers to an invoice created in TeamConnect. CSM Invoice refers to an invoice that was transferred from Collaborati to TeamConnect.

Invoice status messages and descriptions

Invoice Status	Description	Can an Invoice be Adjusted in this State?
Not Posted	The invoice is not posted.	• Manual Invoices—Yes • CSM Invoices—No ***Note:*** *CSM Invoices' custom fields can be adjusted in this state*
Posted	The invoice has been posted.	• Manual Invoices—No • CSM Invoices—No ***Note:*** *All invoices' custom fields can be adjusted in this state*
Pending Approval	The invoice has been submitted for posting and is awaiting appropriate approvals before it can be posted.	• Manual Invoices—Yes • CSM Invoices—Yes
Rejected	The invoice has been rejected in the approval process.	• Manual Invoices—Yes • CSM Invoices—No ***Note:*** *CSM Invoices' custom fields can be adjusted in this state*
Failed	The invoice failed while attempting to post.	• Manual Invoices—Yes • CSM Invoices—No ***Note:*** *CSM Invoices' custom fields can be adjusted in this state*

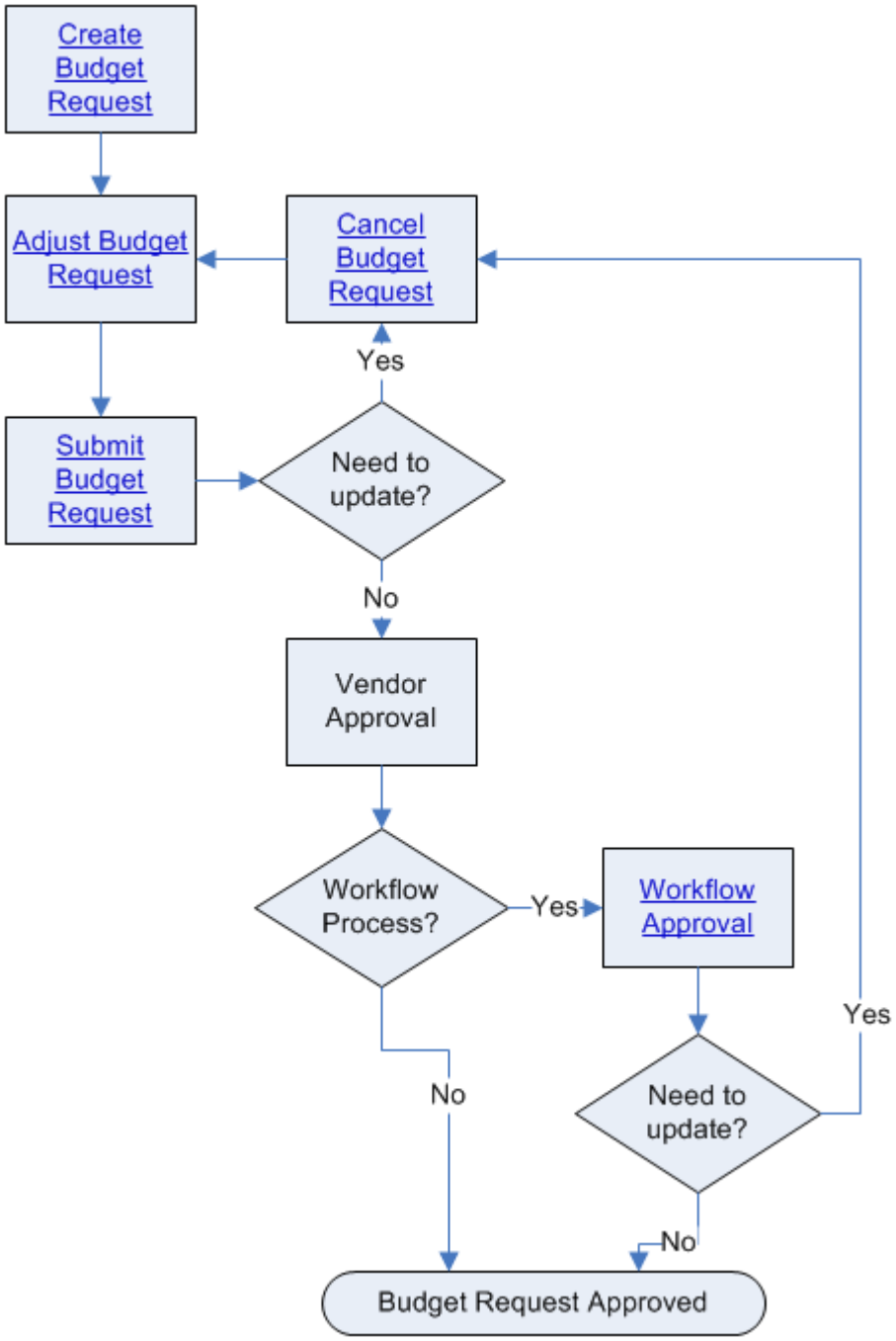
1.7.4 Budget Requests

If you are using the e-billing features of Collaborati Spend Management (CSM), you can send budget requests to vendors for approval. Each combination of vendor and project (a Matter or Dispute) uses one budget request. The cost estimates for an approved budget post to the appropriate Account records for that project.

After a vendor receives a budget request and enters their cost estimates, they submit the request back to you, the client. When CSM receives the budget request, it can go through an approval workflow, much like invoice approvals do. Instructions for handling workflow are found in Workflow.

Depending on your CSM configuration, TeamConnect can automatically generate and send budget requests to vendors when activating the accounts for a matter. See the CSM Administration Guide for this configuration process.

You create budget requests manually or you receive them from Collaborati. If you receive them from Collaborati, see Budget Requests Created by Vendors for more information. If you create budget requests manually, refer to the following flowchart. Click areas of this flowchart for more information.



You can access budget requests from several locations in TeamConnect:

- CSM Settings
- A portal pane in your home page
- A Matter or project record
- A Vendor record
- Pending approvals
- Budgets Requests link under Finance

1.7.4.1 Creating a Budget Request

Budget requests are often created automatically, but you can create them manually if necessary.

See the *Collaborati Spend Management Configuration Guide* for information about the settings that affect automatic budget request creation.

To create a new budget request

1. Select one of the following options:
   - On the **Budget Requests** page, click the **New** button.
   - Click the **New Budget Request** link from the CSM Settings page or from a Vendor record page.
2. Complete the general fields. See Budget Request Fields table for field information.
3. Enter the amounts you want to allocate for the account in the **Starting Amount** column.
4. After you complete the general fields, click **Save**.

   The budget names information in a new budget request does not become editable until the general information is saved.

Finally, the **Notes** field allows you to enter instructions or comments that will be visible to you and the vendor.

Budget Request Field Descriptions

The tables below contains Budget Request field descriptions. The fields that you see may vary based on your system settings and assigned rights.

Budget Request Fields

Field	Description
Name	Assign a name to this request. It is helpful to have matter identification as part of the name, and to use a name that will be familiar to the vendor.

Vendor	Choose a vendor for the request. (If you clicked the New Budget Request from a Vendor record page, this field is pre-populated for you.) Auto-suggest and search features are available for this field.
Matter	Choose a matter for the request. (If you clicked the New Budget Request from a Matter record page, this field is pre-populated for you.) Auto-suggest and search features are available for this field.
Request Date	Type in a date value, or click the calendar icon to use the date picker.
Due Date	Type in a date value, or click the calendar icon to use the date picker.
Status	This field is not editable. The initial status for all new budget requests is **Not Submitted**.

1.7.4.1.1 Submitting a New Budget Request

Budget requests are submitted by changing the phase of the request to **Submit**. The request will be sent to the vendor during the next synchronization performed by Collaborati Spend Management.

1.7.4.1.2 Budget Requests Created by Vendors

Under some conditions, vendors using Collaborati are allowed to rebudget a matter-to create a new budget request for the matter. Although uncommon, it is possible that the vendor is doing a rebudget process at the same time that you are creating a budget request for the same matter. This conflict will be detected during synchronization, and handled as follows:

- If you have created a budget request, but have not submitted it, the vendor's budget request will take precedence over the one that you created. Your budget request will be changed to status "Cancelled".
- If you have created a budget request and submitted it, yours will take precedence over the one that the vendor just created. The vendor's budget request will be changed to status "Cancelled". Your budget request will appear in Collaborati.
- If you recently deleted one or more matter accounts, those accounts will be removed from any vendor-created budget request during synchronization. The budget request itself will remain open.

1.7.4.2 Editing a Budget Request

A budget request can be edited when its status is **Not Submitted** or **Pending Approval**.

Vendor and **Matter** cannot be edited after the request is created.

Name and **Request Date** can only be edited if the phase is **Not Submitted**.

1.7.4.2.1 Adjusting Budget Requests

The Budget Account section lets you make changes to budget requests while in the workflow process.

To adjust budget requests

1. Open the appropriate budget request.
2. In the left pane, click the **Budget** page.
3. The **Budget Accounts** section displays all budget accounts associated with the matter that appears in the **Matter** field.
4. Adjust budget amounts in the **Starting Amount** field.

You can only make changes to budget accounts if the budget request status is **Not Submitted**.

The **Budget** and **Period** columns are always visible, but the visibility of other columns in this section vary based on the status of the request, the stored value, and whether or not you are in edit mode. Additionally, the amounts in a field may shift to different field when you save the budget request.

Budget Accounts Section

Field	Description
Budget	The name of the budget account associated with the matter. This field is not editable.
Period	The period start and end date for this account. This field is not editable.
Starting Amount	The amount proposed by the client. In edit mode, you can revise the information in this field if the current status is **Not Submitted**. This field is always visible and is populated when a budget request is created automatically or manually.
Vendor Proposed	The amount proposed by the vendor in Collaborati. This field is not editable. This field is blank when a budget request is created automatically.
Previously Adjusted	The amount that may be adjusted by a user, only during workflow. An amount may appear in this field if the status is Pending Approval and at least one budget account has a value for that field. This field is not editable, and is blank when a budget request is created automatically.

Accepted Amount	The amount suggested by the client after the request is submitted. This amount overrides the current value. If a budget request is in Approved status, this column always displays a value. This value may be from the **Accepted Amount**, **Vendor Proposed**, or **Starting Amount** column, depending on which of these columns displays a value. This field is not editable, and is blank when a budget request is created automatically.
New Accepted	The new amount that is suggested by the client. This amount is saved to the **Accepted Amount** field after the request is submitted. For a new budget request, this field is blank. If an amount is entered in this field, and you click **Save**, the following happens: • If the amount in the **Accepted Amount** field was saved by an approver other than the approver who is currently logged in, this amount moves into the **Previous Adjusted Amount** field. • The amount in the **New Accepted** field moves into the **Accepted Amount** field In edit mode, you can revise the information in this field if the current status is **Pending Approval**.

Submitted, Approved, or Rejected Status

After a budget request is submitted, the following applies:

- If the status is **Submitted**, only the **Starting Amount** column is visible.
- If the status is **Approved**, only the **Starting Amount**, **Vendor Proposed**, and **Accepted Amount** columns are visible and accounts are adjusted.
- If the status is **Rejected**, only the **Accepted Amount** column is visible.

Final values are passed back to the Collaborati vendor.

1.7.4.3 Canceling a Budget Request

A budget request can have its phase changed to **Cancel** if its status is presently one of the following:

- **Submitted**
- **Vendor Review**
- **Pending Approval**
- **Rejected**
- **Error**

If a **Submitted** budget request is canceled, the status becomes **Not Submitted**.

In all other cases, the status becomes **Canceled**.

1.7.4.4 Deleting a Budget Request

A budget request can be deleted if its status is presently one of the following:

- **Not Submitted**
- **Approved** [and Synchronized]
- **Canceled** [and Synchronized]

1.7.4.5 Handling Budget Request Workflow

Budget requests that are returned from a vendor become pending approvals in workflow, in the same manner that invoices are subject to approval. For details about how to approve or reject a workflow item, see Workflow.

Workflow information about a budget request is available from the **Workflow** link while viewing a specific request. The request also has a **Vendor Notes** field that may contain comments from the vendor.

When you approve a budget request, the **Current Budget** amounts in the request are posted to the related Account records. When you reject a budget request, its status becomes Rejected, and the rejection is sent to the vendor during the next Collaborati Spend Management synchronization.

1.7.5 Updating Exchange Rates

The Exchange Rate tool lets you update exchange rates for the currencies that you commonly use. An exchange rate is the value of a foreign nation's currency in terms of the home nation's currency. In TeamConnect, it is the value of the foreign currency based on the selected default currency.

Once you open the Exchange Rate tool, use one of the following options to update exchange rates:

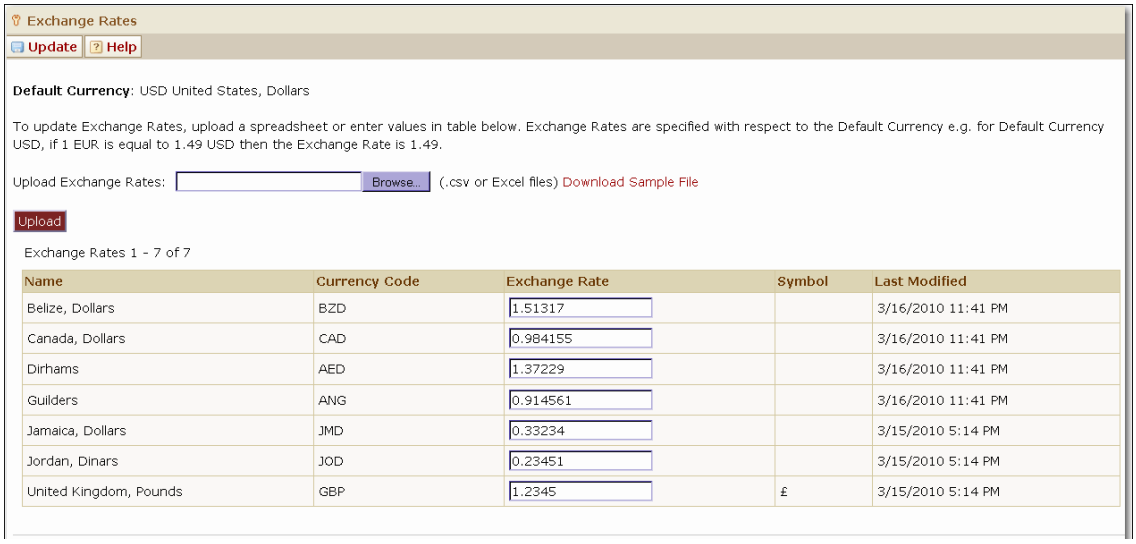
- **Upload a CSV or Excel file—**Create a data file that contains the exchange rates that you want to change, and then upload the file to TeamConnect.
- **Enter exchange rates manually**—Type the modified rates on the Exchange Rates page.

Note: *Typically, currency codes are set up in advance and you cannot delete or change them. You cannot use this tool to add new currency codes. See your system administrator if you want to add or delete currency codes.*

To access the Exchange Rates tool

1. Click the **All** tab.
2. Under **Tools**, click **Exchange Rates**.

   The **Exchange Rates** page opens.



Name	Currency Code	Exchange Rate	Symbol	Last Modified
Belize, Dollars	BZD	1.51317		3/16/2010 11:41 PM
Canada, Dollars	CAD	0.984155		3/16/2010 11:41 PM
Dirhams	AED	1.37229		3/16/2010 11:41 PM
Guilders	ANG	0.914561		3/16/2010 11:41 PM
Jamaica, Dollars	JMD	0.33234		3/15/2010 5:14 PM
Jordan, Dinars	JOD	0.23451		3/15/2010 5:14 PM
United Kingdom, Pounds	GBP	1.2345	£	3/15/2010 5:14 PM

Exchange Rates Page

Creating/Uploading Exchange Rate Data Files

Before you can upload exchange rates into TeamConnect, you must first create the file that contains the data that you want to upload. You can upload an Excel spreadsheet or a CSV (.csv) file.

To create an exchange rate data file

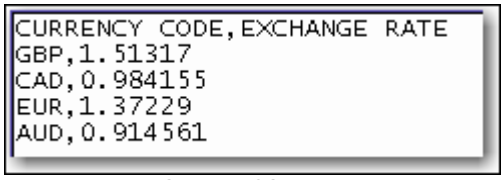
Create an Excel spreadsheet or CSV file based on the following guidelines:

- The first row must contain labels only.
- Additional rows must contain exchange rate data only.
- The first column must contain currency codes only.
- The second column must contain exchange rates only.
- The file extension must be .xls, or .csv.

Note: *TeamConnect provides a sample Excel file. To access this file, click* ***Download Sample File****. The sample file opens in Excel and you can use it to enter the information that you want to change.*

	A	B
1	CURRENCY CODE	EXCHANGE RATE
2	GBP	1.51317
3	CAD	0.984155
4	EUR	1.37229
5	AUD	0.914561
6		

Sample Excel File



Sample CSV File

Uploading Exchange Rate Data Files

Once you create the data file, you can upload it to TeamConnect.

To upload exchange rate data

1. With the Exchange Rates page open, click **Browse** and locate the file that you want to upload.
2. Click **Upload**.

   The **Exchange Rate** column is updated to display the modified rates.

Note: *You can only update exchange rates for currency codes that currently exist. If you need to add additional currency codes, contact your system administrator.*

Updating Exchange Rates Manually

You can manually update exchange rates on the **Exchange Rate** page.

To update exchange rates manually

1. In the **Exchange Rate** column, modify the appropriate exchange rates.
2. Click **Update** to save the changes.

1.8 Documents

A document is any type of item that is added to TeamConnect and is accessible on a **Documents** page, such as a Microsoft Word document, a Microsoft Excel spreadsheet, image files, text files, and email messages.

A document can also be a reference, such as a link to a Web page or a shortcut link that opens a document in a different location.

The following table shows how you can view, add, and update documents.

...Documents	How...
Viewing	• Searching for Existing Documents

	• Viewing Documents • Opening Documents • Sharing Documents using Email • Exporting a List of Documents in a Folder • Downloading Documents • Viewing Document Versions • Reverting to a Previous Version • Viewing or Creating Documents History
Adding	• Adding a Document to TeamConnect • Copying Documents • Creating a Document Shortcut • Creating a Link to a Web Page • Generating Documents Using TeamConnect Data • Working with the IMAP Server and Email
Updating	• Checking Out a Document • Checking In a Document • Canceling a Document Check Out • Viewing or Editing General Information of a Document • Adding and Removing Document Categories
Organizing	• Creating a Document Folder • Moving Documents • Deleting Documents and Document Folders

Document Property Pages

Each document has the following document-specific property pages on which you can view and edit information:

- **General**—View the name, type, and check-out information for a document.
- **Version**—View the various versions of a document. A new version of a document is created each time a document is checked out and then checked back in. You can also use this page to revert to an earlier version of a document if necessary.

There are also additional document property pages that you can use to enter supplementary information, such as security rights for a selected document.

Document Task Buttons and Icons

You can perform the same documents-related tasks on both the global **Documents** page and the **Documents** page for a record. Sometimes the icons that you use to perform tasks are located in different areas, depending on the page.

Global Documents Page (Record Toolbar)	Documents Page for a Record (Task Toolbar)	Task
		Upload a file: Adds a new file to TeamConnect. See Adding a Document to TeamConnect for more information.
		Create a new folder: Creates a folder to hold related documents. See Creating a Document Folder for more information.
		Create URL: Creates a link to a Web page. See Creating a Link to a Web Page for more information.
		Move Document: Moves a document from one location in TeamConnect to a different location in TeamConnect. See Moving Documents for more information.
		Copy Document: Copies a document from one location in TeamConnect to a different location in TeamConnect. See Copying Documents for more information.
		Create Shortcut: Creates a link from your **Documents** page to a document in a different location in TeamConnect. See Creating a Document Shortcut for more information.
		Generate Document: Creates a form document that uses information currently in TeamConnect, such as the name and address of the recipient of the document. See Generating Documents Using TeamConnect Data for more information
		Delete: Removes a selected document. This document cannot be recovered.

		See Deleting Documents and Document Folders for more information.
Help		**Help:** Opens the help for the selected **Documents** page.
		Find: Searches for documents by name, specified search criteria, or text that may be in the document. See Searching for Existing Documents.
		View/edit document properties: Opens the **General**, **Versions**, **Categories**, **Security**, and **History** property pages. Find this icon in the **Action** column.
		Check out a document: Downloads the document to your computer to edit it. Find this icon in the **Action** column. See Checking Out a Document.
		Check in a document: Returns a document to TeamConnect when you are done editing it. Find this icon in the **Action** column when the related document is checked out. See Checking In a Document.
		Undo Check-out: Returns a checked-out document to unchecked-out. Find this icon in the **Action** column when the related document is checked out. See Canceling a Document Check Out.

1.8.1 Searching for Existing Documents

You can locate documents or folders by performing a search using all or part of a document or folder name, text contained in the document, or the name of the person who created the document.

You can search documents in the following ways:

- **Custom Search**—Search for a document using multiple field values as criteria. For example, you can search for documents by name or date on which the document was created.
- **Record Search**—Opens a records **Documents** page to search for specific documents.

Before you add a document to TeamConnect, it is recommended that you perform a search to ensure that the document is not already available.

To search for a document using Custom Search

1. Click the **Documents** tab.
2. Click the **Custom Search** link. This link is located in the body of the list view in the right corner.
3. Select your search criteria, and then click **Search**.

   The documents that match your criteria appear in a list view.

To search for a document within a specific record

1. Open the **Documents** page for a record.
2. Click the **Search Documents** icon.
3. If necessary, in the **View** drop-down list, select a view type.
4. Select an **Operator** and/or **Value**, and then click **Search**.

   The documents that match your criteria appear in a list view.

Note: *The criterion **Document Body** will search the content of the document if that document is in a file format that is recognized by TeamConnect.*

Tip

If you do not see the document that you want, click **Search Again** and expand or narrow your search criteria. For example, use "Contains" as a search criteria instead of "Begins With", "Ends With", or "Equal To".

For more information about search fields and search criteria, see Searching for Specific Records.

1.8.2 Viewing Documents

You can view documents on the global **Documents** page or on the **Documents** page for a specific record type. To open a document, click its link on any page.

Additionally, if you receive an email message that contains a link to a document or document folder, clicking on the link immediately opens the document or document folder. This depends on whether or not you are logged into TeamConnect and have the appropriate rights.

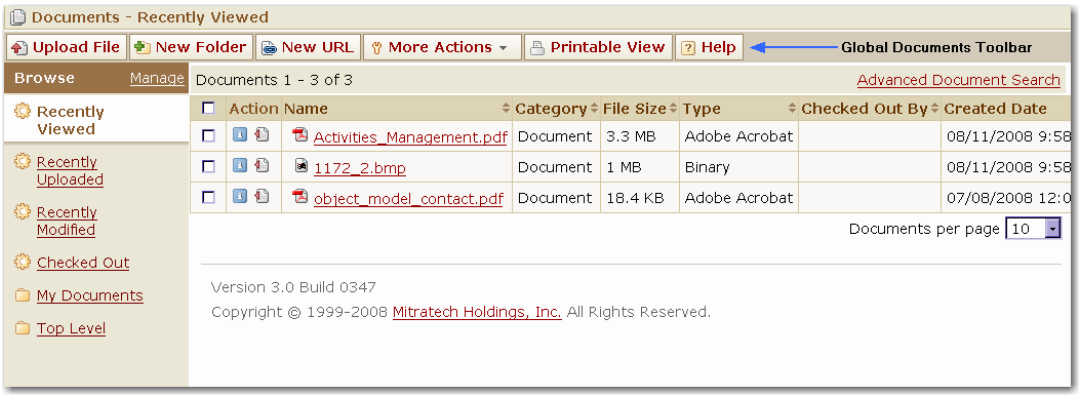
Viewing the Global Documents Area

Based on your access rights, the global **Documents** area allows you to access all of the documents that you have the rights to view in TeamConnect. You can also use this page to subscribe to a

collection of documents that you want to track, such as all documents that are currently checked out for editing, or all documents that were recently added to TeamConnect.

To view the global Documents area

1. Click the **Documents** tab.
2. Use the Global Documents Toolbar to perform most document-related tasks.



Global Documents Page

Viewing the Documents Page for a Record

Several record types have a documents page where you can manage documents that relate to the specified type of record. You can add many types of records to a Documents page, such as court documents, letters, and presentations.

The following record types have a **Documents** page:

- Accounts
- Appointments
- Contacts
- Expenses
- Invoices
- Projects
- Tasks

Related record types **Involved** and **History** also have **Documents** pages, but those record types must be accessed through one of the record types listed above.

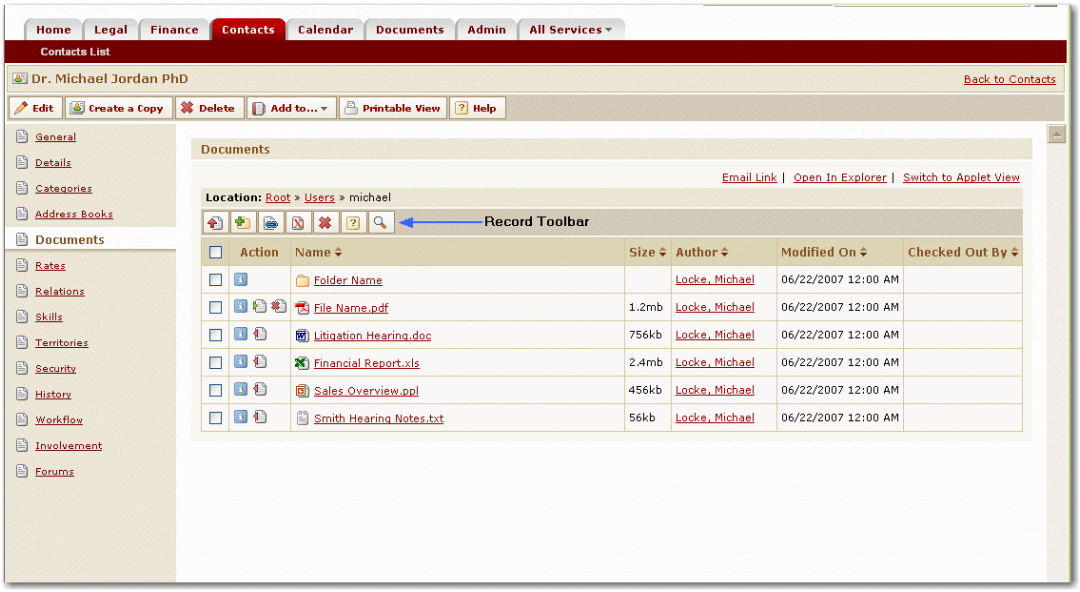
To view the Documents page for a record

1. From your menu, select one of the following options to access the **Documents** page:
   - For **Accounts**—Click the **Finance** tab, and then click the **Accounts** link under the tab bar. In the **Name** column, click the appropriate account.

- For **Appointments**—Click the **Calendar** tab, and then click the **Appointments** link under the tab bar. Switch to your preferred calendar view and then click on the appropriate appointment.
- For **Contacts**—Click the **Contacts** tab, and then click a contact in the **Name** column.
- For **Expenses**—Click the **Finance** tab, click the **Expenses** link under the tab bar, and then click a link in the **Description** column.
- For **Invoices**—Click the **Finance** tab, click the **Invoices** link under the tab bar, and then click a link in the **Invoice Number** column.
- For **Projects**—Click the **All** tab, and then click the project type that contains the appropriate project. When the project type window opens, click a project in the **Project** column.
- For **Tasks**—Click the **Calendar** tab, click the **Tasks** link under the tab bar, and then click a link in the **Subject** column.

  The selected record opens to its **General** page.

2. In the left pane, click the **Documents** page link.



Documents Page for a Contact

1.8.2.1 Opening Documents

You can open any documents that you created, all public documents, documents to which you have the appropriate rights, and document folders. Once you open a document, you can save it or print it. Once you open a document folder, you can manage the documents to which you have the appropriate rights.

You can also open a document to edit it if you have the related software. See Editing Documents for more information.

Note: *If the document does not open, you may not have its application installed on your computer. For example, if you want to open a .pdf file, you must have Adobe Reader installed on your computer.*

To open a document

You can use the following options to open documents:

- On any **Documents** page for a record, or global **Documents** page, locate the document that you want to open and click its link in the **Name** column. The document opens in a separate window.

  See Searching for Existing Documents for more information.

- If available, the **Open in Explorer** link opens the Explorer Web browser that links to the Attachment Root directory of the current record. You can then use the browser to manage your TeamConnect documents. See Using Windows Explorer with Documents (WebDAV) for more information.

1.8.2.2 Sharing Documents using Email

TeamConnect provides a **Share** button that lets you cut-and-paste a document URL into an email message. Once the email message is received, the recipient can click the URL to access the TeamConnect document or document folder.

To share documents in email

1. Select one of the following options:
   - **Documents** page for a record—Open a record, and then click the **Documents** link in the left pane.
   - Global **Documents** tab—Click the **Documents** tab. If necessary, in the left pane, click the link that contains the document that you want to share.
2. Click the **Properties** icon for the document that you want to share.

   The **General** page opens for the selected document.
3. Click the **Share** button.

   The **Share Record** window opens. This window contains the document URL of the document that you want to share.
4. In the **Share Record** window, select the entire URL.
5. Copy the link.

   Tip: *To copy, with the URL highlighted, right-click and select* ***Copy****.*
6. Paste the link into an email message.

To open a document URL received in an email message

If you are logged on to TeamConnect and have the appropriate rights, clicking a document URL in an email message opens the document in a browser window.

If the document URL links to a document folder or a document that contains other files (such as a .zip file), clicking the link opens the TeamConnect **Documents** page where the folder or file resides.

Note: *If you are not logged-in to TeamConnect, the login page opens. Log in to access documents. Browser settings determine the way that documents are displayed. For example, if the browser is set to open a new tab whenever a document is opened, clicking a document URL link always opens the document in a separate tab.*

1.8.3 Using Documents Collections

The global **Documents** area provides easy access to all of the documents in TeamConnect without having to search for them. Document collections let you view specific groups of documents, such as all of the documents that were recently added to TeamConnect or all of the documents that are currently checked out.

To view and open Documents collections

1. Click the **Documents** tab. The list view opens and collections are listed in the left pane.
2. To open a collection and view its contents, click its link in the left pane.

By default, the following document collections are available in the left pane:

- **Recently Viewed**—Displays the last 50 documents that you opened and viewed. You cannot delete this collection or change its order. It is always the first collection listed in the left pane.
- **Recently Uploaded**—Displays all of the documents that were added to TeamConnect within the last 30 days.
- **Recently Modified**—Displays a list of documents that were edited within the last 30 days.
- **Checked Out**—Displays a list of documents that are currently checked out of TeamConnect.
- **My Documents**—Displays a list of documents that you added to TeamConnect, or document references that you created. Since you are the default author of these documents, there is no **Author** information displayed.
- **Top Level**—Displays the TeamConnect file structure:
    - **Attachments** navigates to the **Documents** page for a project, appointment, contact, history, task, account, expense, or invoice record.
    - **Users** navigates to the personal **Documents** folders for all TeamConnect users.
    - **System** navigates to the **Documents** page for system folders.

In addition to the default document collections, there may be other collections to which you can subscribe. When you subscribe to a collection, its link appears in the collection list and you have access to its contents. You can change the order in which your collections are listed and remove collections that you no longer need.

1.8.4 Managing Documents

A document in TeamConnect is any type of item that is added to TeamConnect and is accessible on a **Documents** page, such as a Microsoft Word document, a Microsoft Excel spreadsheet, image files, and text files.

A document is also a reference to a document, such as a link to a Web page, or a shortcut link that opens to a document in a different location.

You can perform the following tasks to manage documents in TeamConnect:

- Adding a Document to TeamConnect—Upload a document to a Documents page.
- Editing Documents—Edit a document by first checking it out, and then checking it back in when you are done editing it.
- Creating a Document Folder—Create a folder to hold related documents.
- Exporting a List of Documents in a Folder—Export a list of documents to an Excel spreadsheet or as a .pdf file.
- Copying Documents—Copy documents from one location in TeamConnect to a different location in TeamConnect.
- Moving Documents—Move documents from one location in TeamConnect to a different location in TeamConnect.
- Creating a Document Shortcut—Create a bookmark that allows you to access a document that is in a different location in TeamConnect.
- Creating a Link to a Web Page—Create a link that allows you to access a Web page.
- Downloading Documents—Copy a document from TeamConnect to your computer.
- Generating Documents Using TeamConnect Data—Use the Document Generator to create a form document, such as a standard status letter that you send to clients.
- Using Windows Explorer with Documents (WebDAV)—Use the Windows Explorer browser to view, copy, move, edit, and delete TeamConnect documents.

The tasks that you can perform depend on your assigned rights.

1.8.4.1 Adding a Document to TeamConnect

To add a new document to a **Documents** page, you upload it from a computer to TeamConnect.

A document in TeamConnect may be many different types, such as a word-processed file, a spreadsheet, image files, text files, or email messages. A document is also a reference to a document, such as a link to a Web page, or a shortcut that opens to a document in a different location.

After you add a document to TeamConnect, you are listed as its author. As the author, you can edit or delete your documents and assign security rights that deny or allow other users to access it.

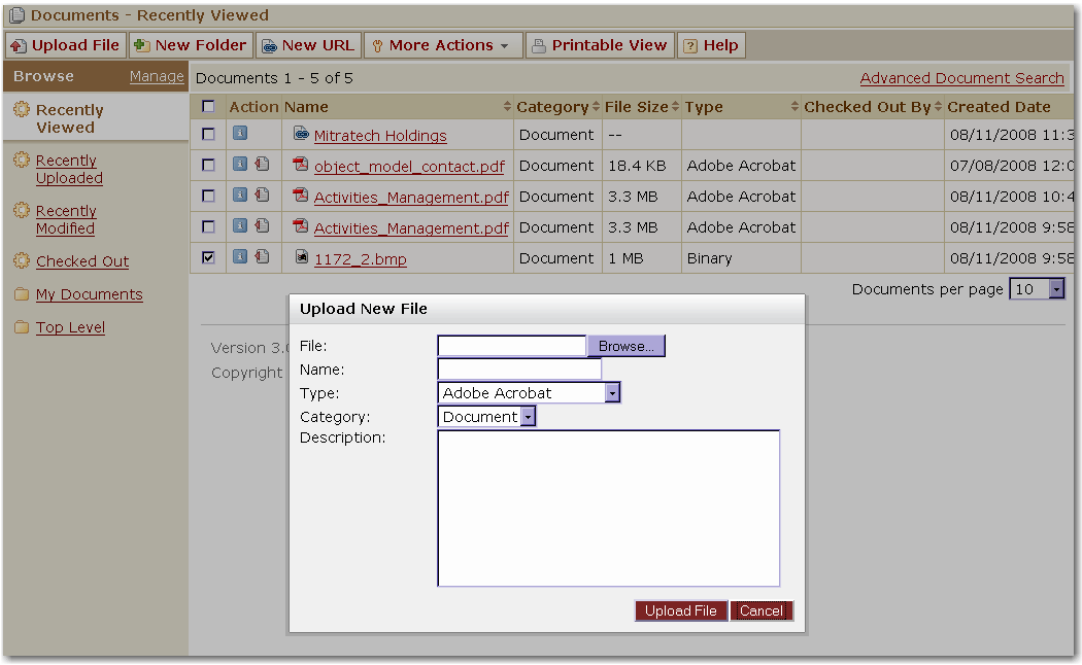
If you added the document using the **Documents** tab, all of the documents that you add are automatically listed in the **My Documents** collection, unless you navigate to a specific record. See Using Documents Collections for more information.

Important: *Your system administrator can limit the size of documents that you can add to TeamConnect. An error message appears if you exceed the limitation. The size of the documents that you can add also depends on the amount of memory that is currently available on your company's server. You may have difficulty adding documents if the server memory is low. Contact your system administrator if you are having difficulty adding documents.*

To add a document to TeamConnect

1. Open the **Documents** page where you want to add the new document. If you want to add a document to a folder, click the folder to open it.
2. Click the **Upload File** button or icon. See Sharing Documents using Email for more information.

   The **Upload New File** window opens.



Upload New File Window

3. Click **Browse** to locate the file that you want to add.
4. In the **Name** field, enter the name of the document as you want it to appear on the **Documents** page. The name defaults to the current file name if you do not change it.

5. In the **Type** drop-down list, click the type of file that you are adding. TeamConnect selects the file type if you do not select one. See the Supported Document Types for more information.

   If you do not see the file type that you want, speak to your system administrator to see if it can be added.

6. (optional) In the **Category** drop-down list, select the category that applies to this document.
7. (optional) In the **Description** box, enter a description of the file.
8. Click **Upload File**.
   - If you logged on using your personal login id and password, and you are on the **Documents** tab, the file is visible in the **My Documents** collection. See Using Documents Collections for more information.
   - If you added this document to a **Documents** page for a record, the document is visible on the selected page.
9. If necessary, complete the associated document property pages to add additional information, such as the category to which this document belongs or its access rights.

Supported Document Types

The list below provides the default document types that you can add to TeamConnect. Based on your policies, your list may include additional document types. The document types are listed in alphabetical order.

Document Type	File Extension
Adobe Acrobat	pdf
Audio (Aiff)	aiff
Audio(wav)	wav
Binary	bin
Data Mapping File	dm
GIF	gif
HTM	htm
HTML	html
Image-jpg	jpg

Image-pcx	pcx
Image-tiff	tiff
JAR File	jar
JavaClass	class
JavaScriptCode	js
JSP	JSP
Microsoft Access	mdb
Microsoft Excel	xls, xlsx
Microsoft Power Point	ppt, pptx
Microsoft Word	doc, docx
Quicktime Video	mov
Rich Text Format	rtf
Standard Email	eml
Text	txt
Video	mpg
XML	xml
ZIP	zip

1.8.4.2 Editing Documents

To edit a document that is currently in TeamConnect, you must use the following process:

1. **Check out the document**—When a document is checked out, no other users can edit it. See Checking Out a Document for more information.
2. **Open the document and make the necessary changes**—You must have the associated application to open and edit a document.

3. **Check in the edited document**—Upload the edited version of the document to TeamConnect. See Checking In a Document for more information.

The edited document is now the latest version in TeamConnect. You can edit documents that you own or to which you have the appropriate rights.

If you check out a document and decide not to make any changes, you can cancel the check out. When you cancel a check out, the document remains as it was before you checked it out. See Canceling a Document Check Out for more information.

Document Versions

Each time you check out a document and then check it back in, a new version is created and added to the document **Version** page. See Viewing Document Versions for more information.

1.8.4.2.1 Checking Out a Document

To edit a document, you must first check it out of TeamConnect so that others cannot edit it at the same time.

To check out a document

1. Open the **Documents** page that contains the document that you want to edit.
2. In the **Action** column, click the check out icon next to the document that you want to edit.

Documents Page - Check Out a Document

3. If a window appears with options to save or open the document, select the appropriate option. The document is handled as specified.

   Once the document is checked out, in TeamConnect, your name is listed in the **Checked Out By** column on the selected **Documents** page, and only the check-in and undo icons are visible in the **Action** column.

Documents Page - File Checked Out

4. Make the necessary changes to the document.

When you are done making changes to the document, you can check it back in to TeamConnect. See Checking In a Document for more information.

1.8.4.2.2 Checking In a Document

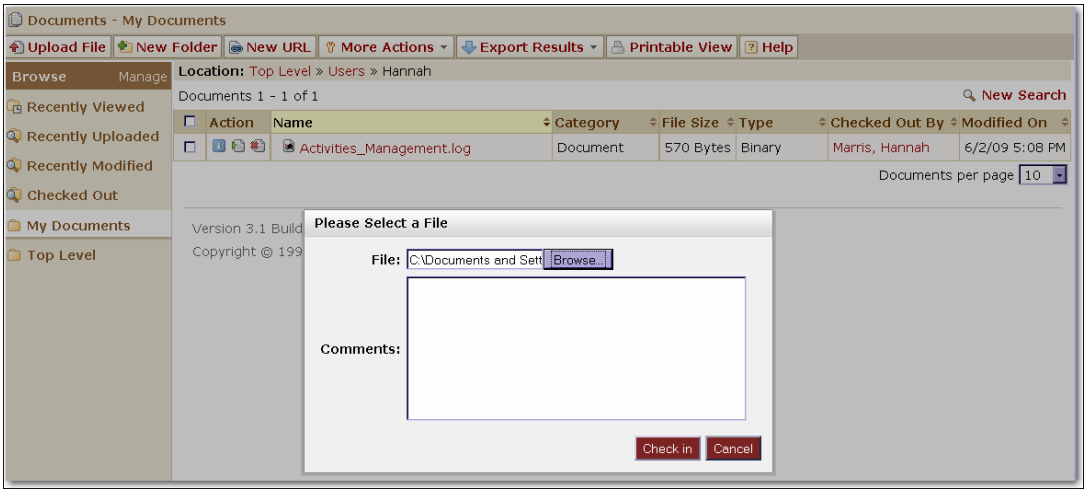
Once you are done editing a document, you can check it back in to TeamConnect.

To check in a document after editing

1. In TeamConnect, locate the document that you checked out.
2. In the **Action** column, click the check in icon .

Documents Page - File Checked Out

3. In the **Please Select a File** window, browse to the file that you want to check in, and then click **Check in**.



Documents Page - Check In

The edited document is saved to the original **Documents** page, your name is removed from the **Checked Out By** column, and the check out icon is visible again.

Additionally, this new version of this document is added to the **Versions** page. See Viewing Document Versions for more information.

Caution: *If the document is not the same as the one that you checked out, the document that you check in overwrites the document that is currently in TeamConnect.*

1.8.4.2.3 Canceling a Document Check Out

If you decide not to make changes to a document that you checked out, you can cancel the check out.

To cancel a document checkout

1. In TeamConnect, locate the document that you checked out.
2. In the **Action** column, click the undo icon .

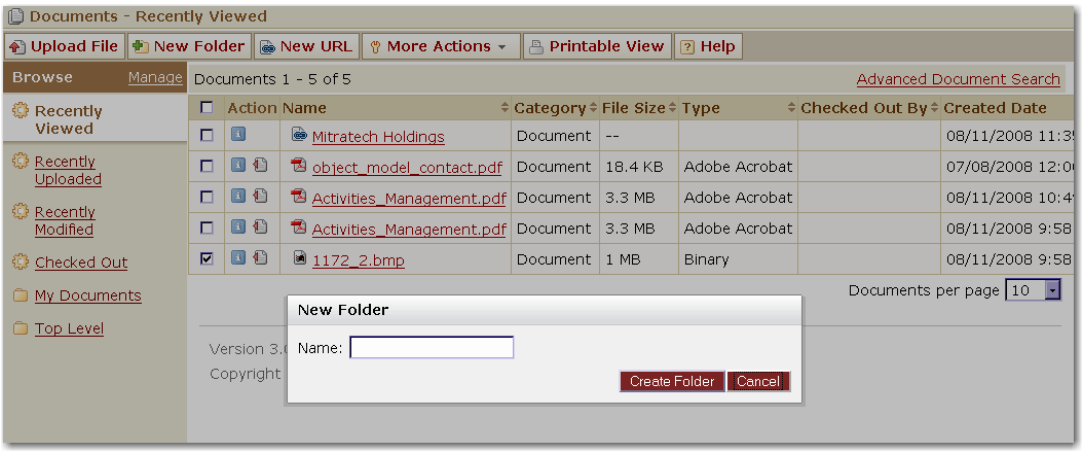
1.8.4.3 Creating a Document Folder

You can create a document folder to store related documents.

To create a document folder

1. Open the **Documents** page where you want to create the new folder.
2. Click the **New Folder** button or icon.

   The **New Folder** window opens, and the **Documents** page is grayed-out in the background.



Documents New Folder Window

3. In the **New Folder** field, enter the name of the new folder, and then click **Create Folder**.

Caution: *You cannot use special symbols or characters in folder names. You can only use alphanumeric letters, numbers, and the underscore character, for example Status123_today. If you use special symbols or characters in folder names, they are replaced with hyphens (-). For example, if you enter Status12**@today, the folder name will appear as Status12---today.*

The new folder is created. To view the folder:

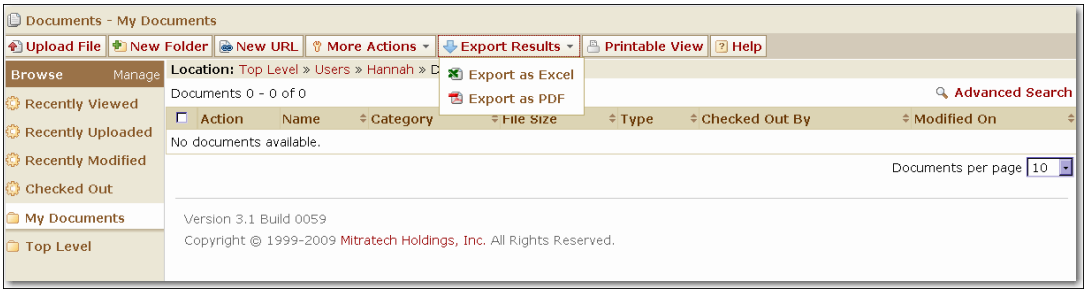
- If you created the new folder in the global **Documents** area, click the **My Documents** collection link in the left pane to view it.
- If you created the new folder on the **Documents** page for a record, your folder is visible in the selected location.

1.8.4.4 Exporting a List of Documents in a Folder

You can export a list of folders on a **Documents** page and/or a list of the contents in a document folder. You can export the list in an .xls format that you can open in Microsoft Excel, or a .pdf format that you can open in Adobe Acrobat Reader.

To export a document folder list

1. Open the Documents folder that contains the list of documents that you want to export. See Viewing Documents for more information.
2. Click **Export Results**, and then select one of the following options:
   - Export as Excel
   - Export as PDF



Export Results Drop-Down List

3. When the File Download window opens, select one of the following options:
   - **Save**—Saves the file to the selected location without opening it.
   - **Open**—Immediately opens the file in the related application. If you select this option, you must save this file if you want to access it later.

1.8.4.5 Copying Documents

You can copy documents and document folders from one location in TeamConnect to a different location in TeamConnect. You can only copy documents that you own or to which you have the appropriate rights.

Note: *To copy documents, you must have View and Create document rights.*

What is Copied

When you successfully copy a document or folder, the following information is copied from the original document record:

- The assigned categories on the **Categories** page
- Everything on the **Details** page
- Everything on the **General** page
- The User Rights and Groups Rights on the **Security** page

What is Not Copied

The following items are not copied from the original document record:

- Historical entries on the **History** page
- Versions that are listed on the **Version** page
- Approvals on the **Workflow** page

Copying Do's and Don't's

- You can copy documents from a system **Documents** collection, such as **Recently Viewed**, **Recently Modified**, or **Checked Out**.

- You cannot copy documents into a system documents collection.
- You can copy documents into your personal **My Documents** folder or go to the **Top Level** folder > **Users** folder and locate the appropriate users **Documents** folder.
- You can copy documents between different record types. if you have the appropriate rights. For example, you can copy a document from a contact's **Documents** page to a project's **Documents** page.

To copy documents in TeamConnect

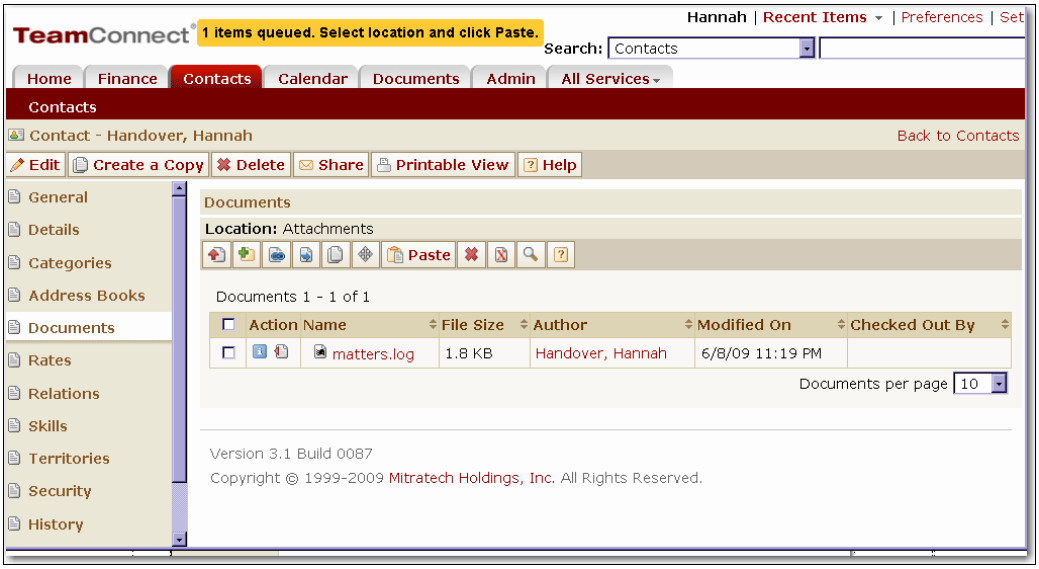
1. Open the **Documents** page that contains the document that you want to copy.
2. Select the check-box for the document that you want to copy. You can select more than one check-box if necessary, but only if you want to copy all of the selected documents to the same location.
3. Select one of the following options:
   - If you are on the global **Documents** page, click **More Actions**, and then select **Copy Document**.

Global Documents Page - Copy Document

   - If you are using the **Documents** page for a record, click the **Copy** icon.

Documents Page for a Record - Copy Icon

A confirmation message appears at the top of the screen confirming the number of items that you want to copy.



Documents Page - Copy Confirmation

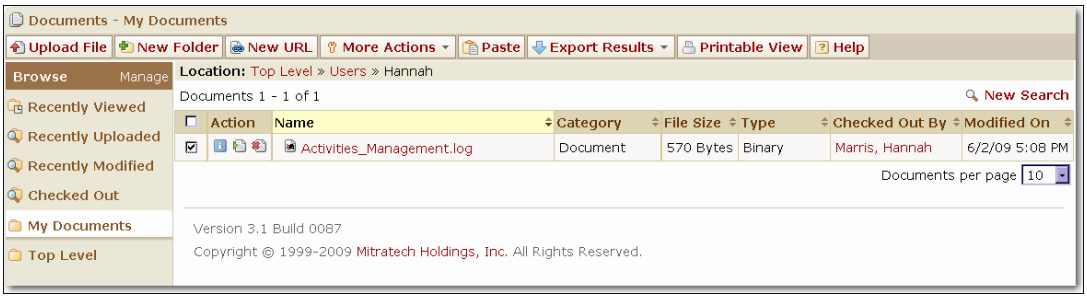
4. Select one of the following options to select the location where you want to copy the document(s).

   - To copy the document to your own **Documents** page, click the **Documents** tab, and then, in the left pane, click **My Documents**.
   - To copy a document to another user, click the **Documents** tab, and then, in the left pane, click **Top Level**. On the Documents -Top Level page, in the **Name** column, click the **Users** folder and then click the name of the user to whom you want to copy the document.

     Tip: *To alphabetize the list of users, on the Documents - Top Level page, click on the Name label.*

   - To copy documents to a different record type, locate the appropriate **Documents** page. For example, if you want to copy a document from your personal Documents page to the Documents page for an Invoice, click the **Finance** tab, click the **Invoices** sub-tab, and then click the **Documents** link in the left pane.

5. Click **Paste**.



Documents Tab - Paste

A copy of the selected document is now available on the selected **Documents** page.

On the Global Documents page, the **Paste** button is located on the Global Toolbar; on a Documents page for a record, the Paste button is located on the Record Toolbar. See Sharing Documents using Email for more information.

If a Document Copy Fails

If one or more of the documents fails to copy, you will see an error message listing the failed documents. A document copy may fail for several reasons, such as the document that you want to copy is checked out by another user.

If the document is not visible in the selected location, you may not have rights to view or copy documents in TeamConnect. Contact your system administrator.

1.8.4.6 Moving Documents

You can move documents and folders from one location in TeamConnect to a different location in TeamConnect. Once you move a document, it is no longer available in the old location.

You can only move documents and folders that you created or to which you have the appropriate rights.

Note: *To move documents, you must have View and Create document rights.*

Moving Do's and Don't's

- You cannot move documents from a system documents collection, such as **Recently Viewed**, **Recently Modified**, or **Checked Out**.
- You cannot move documents into a system Documents collection.
- You can move documents into your own **My Documents** folder or go to the **Top Level** folder > **Users** folder and locate the appropriate users documents folder.
- You can move documents between different record types. For example, you can move a document from a contact's **Documents** page to a project's **Documents** page.

To move documents in TeamConnect

1. Open the **Documents** page that contains the document that you want to move, and then select its corresponding check-box. You can select more than one check-box only if you intend to move all of the selected documents to the same location.
2. Select one of the following options:
   - On the global **Documents** page, click **More Actions**, and then select **Move Document**.
   - On the **Documents** page for a record, click the Move icon.

     A confirmation message appears at the top of the screen confirming the number of items that you want to copy.

3. Select one of the following options to select the location where you want to move the document(s).
   - To move documents to your own Documents page, click the **Documents** tab, and then, in the left pane, click **My Documents**.
   - To move a document to another users, click the **Documents** tab, and then, in the left pane, click Top Level. On the **Documents -Top Level** page, in the **Name** column, click the **Users** folder and then click the name of the user to whom you want to move the document.

     Tip: *To alphabetize the list of users, on the* ***Documents - Top Level*** *page, click on the* ***Name*** *label.*

   - To move documents to a different record type, locate the appropriate **Documents** page. For example, if you want to move a document from your personal **Documents** page to the **Documents** page for an Invoice, click the **Finance** tab, click the **Invoices** sub-tab, and then click the **Documents** link in the left pane.
4. Click **Paste**.

   The document is moved to the selected **Documents** page.

   If one or more of the documents fails to move, you will see an error message. A document move may fail for several reasons, such as the document that you want to move is checked out by another user.

   If the document is not visible in the selected location, you may not have rights to move documents in TeamConnect. Contact your system administrator.

1.8.4.7 Creating a Document Shortcut

Create a shortcut if you want to provide a link that lets a user access a document that is on your **Documents** page.

Shortcut Do's and Don't's

- You cannot create shortcuts to a document in a system documents collection, such as **Recently Viewed**, **Recently Modified**, or **Checked Out**.
- You cannot create shortcuts in a system documents collection.
- You can create shortcuts in your own **My Documents** folder or go to the **Top Level** folder > **Users** folder and locate the appropriate users documents folder.
- You can create shortcuts between document types, For example, you can copy a document from a contact's **Documents** page to a project's **Documents** page.

Important: *To create a shortcut, you must have View and Create document rights. In order for a user to access your document using a shortcut, you must allow them View access on the Documents* ***Security*** *page. See Working with Record Security for more information.*

To create a document shortcut

1. Locate the document or folder for which you want to create the shortcut link, and then select its check-box. You can select more than one check-box, but only if you intend to create all of the shortcuts in the same location.
2. Select one of the following options:
   - On the **Documents** tab, click **More Actions**, and then click **Create Shortcut**.
   - On the **Documents** page for a record, click the Shortcut icon.

     A confirmation message appears at the top of the screen confirming the number of items.
3. Select one of the following options to select the location where you want to create the shortcut(s).
   - To add the shortcut to your own **Documents** page, click the **Documents** tab, and then, in the left pane, click **My Documents**.
   - To create a shortcut on another users page, click the **Documents** tab, and then, in the left pane, click **Top Level**. On the **Documents -Top Level** page, in the **Name** column, click the **Users** folder and then click the name of the appropriate user.

     Tip: *To alphabetize the list of users, on the* ***Documents - Top Level*** *page, click on the* ***Name*** *label.*
   - To create a document shortcut on a different record type, locate the appropriate **Documents** page. For example, if you want to crate a document shortcut from your personal **Documents** page to the **Documents** page for an Invoice, click the **Finance** tab, click the **Invoices** sub-tab, and then click the **Documents** link in the left pane.
4. Click **Paste**.

   The shortcut is added to the selected location.

   If the shortcut is not visible in the selected location, you may not have rights to view documents in TeamConnect. Contact your system administrator.

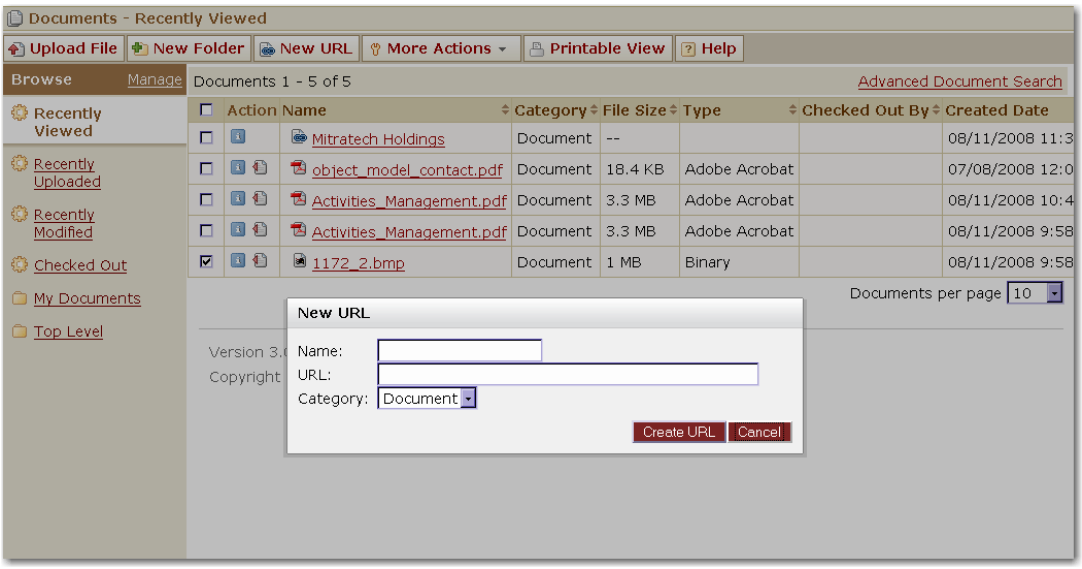
1.8.4.8 Creating a Link to a Web Page

You can create a document link that opens to a Web page.

To create a link to a Web page

1. Open the **Documents** page where you want to create a link to a Web page.
2. Click the **New URL button** or icon.

   The **New URL** box opens and the **Documents** page is grayed-out in the background.



Documents New URL Window

3. In the **Name** box, enter the name of the Web page as you want it to appear on the **Documents** page.
4. In the **URL** field, enter or paste the appropriate Web address.

   Tip: *For accuracy, open the Web page and copy-and-paste the Web address into this field.*

5. If necessary, in the **Category** drop-down list, select a category.
6. Click **Create URL**.

   The link appears on the selected **Documents** page next to its URL icon.

1.8.4.9 Downloading Documents

When you download a document, you save it to a location other than TeamConnect, such as your personal computer. You can also download email messages.

Note: *If you need to make changes to a document, you must first check it out of TeamConnect. See Editing Documents.*

To download a document

1. Locate the document that you want to download and click its link in the **Name** column.

   The document opens in its related application. If an additional window opens asking how you want to handle the file, select the desired options.

   If the document does not open, you may not have its application installed. For example, if you want to open a .doc file, you must have Microsoft Word installed on your computer.

2. To save the document, use the save function that applies to the associated application.

To download an email message

1. Locate the email message that you want to download and click its link in the **Name** column.
2. Click **Download Email**, and then click the appropriate options to save the email message to the preferred location.

1.8.4.10 Generating Documents Using TeamConnect Data

The Document Generator lets you use a template to generate a document that contains data from TeamConnect records. For example, your organization may have already set up templates for generating letters to your clients. Information in the generated letter, such as contact names, addresses, and record numbers, are automatically filled in when you generate the document.

Templates are usually pre-defined by your system administrator. You must have the appropriate rights to generate a form document.

You can generate a document using the **Documents** tab or the **Documents** page for a record.

To generate a document from the Documents tab

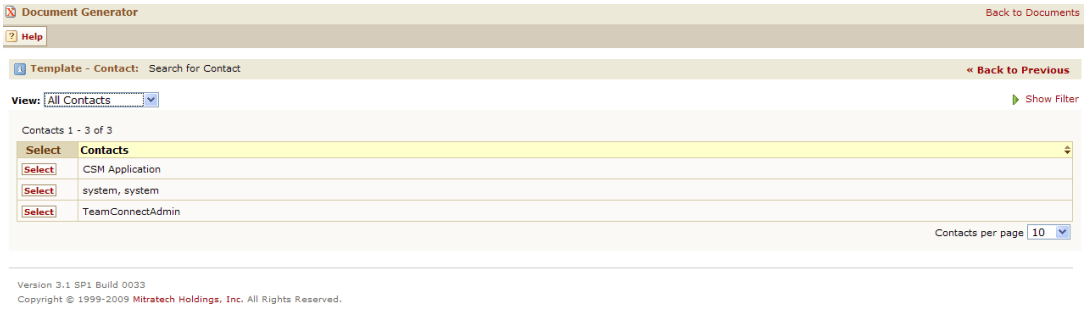
1. Click the **Documents** tab, and then click **More Actions**.
2. Select **Generate Document**.

   The first page of the Document Generator opens.

Documents Tab - Document Generator First Page

3. Expand the tree to locate the appropriate template.
4. Check the box of the desired template, and then click **Next**.

   The object record selection page opens.



Object Record Selection Page

5. Click the Select button of the object record that will be used during document generation.
6. On each page that follows, enter or select the appropriate information, and then click **Next** until you reach the final page.
7. To view the document before it is generated, click **Preview Document**.
8. If necessary, in the **Name** field, enter the name of the document. This is the name of the final generated document.
9. In the **Default Category** drop-down, select the appropriate category.
10. Click **Save Document** to create the document. The generated document is saved to the selected object record.

You can leave the document in this location until you are ready to use it, or you can print it. See Printing Documents for more information.

To generate a document from the Documents page for a record

1. Open the **Documents** page for the appropriate record type.
2. Click the Document Generator icon.

   The first page of the Document Generator opens.

Documents Page for a Record - Document Generator First Page

3. Expand the tree to locate the appropriate template.
4. Check the box of the desired template, and then click **Next**.
5. On each page that follows, enter or select the appropriate information, and then click **Next** until you reach the final page.
6. If necessary, in the **Name** field, enter the name of the document. This is the name of the final generated document.
7. To view the document before it is generated, click **Preview Document**.
8. In the **Default Category** drop-down, select the appropriate category.
9. Click **Save Document** to create the document. The generated document is saved to the selected object record.

You can leave the document in this location until you are ready to use it, or you can print it. See Printing Documents for more information.

1.8.4.11 Using Windows Explorer with Documents (WebDAV)

If your system administrator enabled it, once you open the **Documents** page for a record, you may see an **Open In Explorer** link.

WebDAV enables Windows Explorer to connect to your TeamConnect documents.

To use WebDAV

1. Click the **Open in Explorer** link to open a Windows Explorer folder that links to the Attachment Root directory of the current record.
2. If WevDav is enabled, you can use Windows Explorer to perform the following document tasks:

- Open, view, and save documents to your computer
- Open, edit, and save documents
- Copy documents
- Move documents

For more information, see your system administrator.

1.8.5 Viewing or Editing General Information of a Document

Use the Document **General** page to view information about a document, including the author of the document, when the document was last checked out and back in, when it was created and modified, and the file type and size. If necessary, you can change the name of the document, the author of the document, and the date the document was authored.

Custom Details

This page may also contain a **Details** section that displays custom fields that appear or disappear based on the selections you make on the Documents **Categories** page. See Adding and Removing Document Categories for more information.

To view or edit documents general information

1. Open the **Documents** page with the document you want to view or edit.
2. In the **Action** column, click the **Properties** icon.
3. To edit the document name, author, or date, click **Edit**, and then make the appropriate changes. See the Document General Page Field Descriptions for specific details.
4. Select a save option.

Document General Page Field Descriptions

The tables below contain the default sections and fields. The information that you see may vary based on your company policies and access rights. The fields are listed in alphabetical order.

Document Information Section

Field Name (* = required)	Description
Author	The name of the user who authored the document. The default author is the person who uploaded the document. • To change the name of the author, click the search contacts icon.

	• To view the contact record for this author, click the view contact icon.
Checked Out By	The name of the user who currently has the document checked out.
Checked Out On	The date that the user checked out the document.
Date Authored	The date that the document was uploaded to TeamConnect. To change this date, click the calendar icon, or enter the date manually.
File Size	The size of the document.
File Type	The name of the application that applies to this document or the format of the document.
Folder Path	The path that leads to location where the document is stored. If you click the link in the field, you will open the document General page for the named document.
***Name**	The name of the document. The default is the current name of the document.
Record	The name of the user that added the document to TeamConnect. If you click the link in this field, you will open the contact **General** page for the named user.

Notes Section

Notes that apply to the selected document.

Access Information Section

Field Name	Description
Created By	The name of the user who added the document to TeamConnect. To view the associated contact record, click the link in this field.
Created On	The date that the document was added to TeamConnect.
Modified By	The name of the user who last modified the document. To view the associated contact record, click the link in this field.

Modified On	The date on which the document was last modified.

Details Section (optional)

The information in this section varies depending on the selections you make on the **Categories** page. If there are no custom fields associated with the assigned categories, or if you do not have rights to view custom fields, this section does not appear.

See Adding and Removing Document Categories for more information.

1.8.6 Viewing Document Versions

Use the Document **Versions** page to view the new versions of a document that are created each time you check a document out, and then back in to TeamConnect. Each version is listed with the checked in date and time, the name of the user who modified the document, and any necessary notes.

The link to the **Versions** page only appears if you have the appropriate rights.

To view documents versions

1. Locate the document whose versions you want to view.
2. In the **Action** column, click the **Properties** icon.
3. In the left pane, click the **Versions** link.

You can also use the **Versions** page to revert to a previous version of a document. See Reverting to a Previous Version for more information.

Tip: *If you created a copy of this document to a different location in TeamConnect, the copy is not reverted. You must re-copy this document if you want the latest version.*

1.8.6.1 Reverting to a Previous Version

Reverting lets you delete the current version of a document and replace it with an older version. You may need to revert to a previous version of a document if the current version is corrupt or the updates to the current version are no longer necessary.

To revert to a previous version of a document

1. Open the **Versions** page for the appropriate document.
2. Click **Edit**.
3. In the **Versions** section, select the radio button of the version to which you want to revert.
4. Click **Revert**.

The version that you selected is now listed in the **Current Version** area and any listed versions that were created after the new current version are permanently removed from the **Versions** section.

1.8.7 Adding and Removing Document Categories

Use the document **Categories** page to assign a document to a grouping that may describe the type of document or its purpose. Categories are usually pre-defined by your system administrator and each category may include one or more subcategories.

Additionally, when you select a category, custom fields may appear on the General page in the Details section. These fields are related to the categories that you select and may have related fields that must be completed before you can save the record.

How Categories Affect the Details Page

For example, you may have a document that you assigned to a category named *Service of Process*. Once you assign the document to the Service of Process category, the **Details** section on the **General** page may display custom fields that allow you to enter the date of the Service of Process, the name of the court that is handling the case, and other information related to the Service of Process in this matter.

Based on your access rights, you can view, add, change, or delete categories.

1.8.7.1 Viewing or Creating Documents History

Use the **History** page to view and write historical details that are related to the selected document, such as the content of telephone calls or historical notes that relate to the selected document.

See Working with Record History.

1.8.8 Printing Documents

You can print a list of documents on any documents page in TeamConnect.

You can also open a document and print it using the related application's print function.

To open a document and print it

1. In TeamConnect, locate the document that you want to print.
2. In the **Name** column, click the document to open it.

   If the document does not open, you may not have its application installed on your computer. For example, to open a .doc file, you must have Microsoft Word installed on your computer.
3. If an additional window opens asking how you want to handle the file, select the desired option, and then click **OK**.
4. When the document opens, use the print function that applies to the application.

You can also print a list of documents on any page.

1.8.9 Deleting Documents and Document Folders

Deleting a document removes it from TeamConnect and you cannot reverse the deletion. If you delete a document folder, the folder and all of its contents are also deleted.

You can only delete documents and folders that you own or to which you have the appropriate rights.

What is Deleted

When you delete a document, the following items are deleted:

- **Documents:**
  - Associated approvals
  - All shortcuts that lead to this document
  - Associated history records
  - Categories and the related custom fields:
  - If the category that you selected for the document caused custom fields to appear in the **Details** section on the **General** tab, when you delete the category, the custom fields are deleted.
  - If the deleted category was set as the default, the Root category is automatically set as the default category.
- **Document folders:**
  - All associated subfolders and their contents

Note: *You cannot delete a checked out document or a document within a checked out folder.*

Tip: *The top-level folder is the page that opens when you click the* ***Documents*** *link for a record. If necessary, you can void the transaction first and then delete the record.*

To delete a document or document folder

1. Locate the document or folder that you want to delete.
2. In the **Action** column, click the properties icon.
3. Click **Delete**, and then click **Yes** in the confirmation window.

   The document is deleted from the **Documents** page and from TeamConnect.

1.8.10 Updating Security Rights of Document Folders

Document folders have security settings that determine whether subfolders and files receive the same rights as a folder. By default, system administrators set the default security settings of all folders.

You can update the settings of each folder on the **Security** page of a folder:

- **Replace Rights on subfolders**—With a checkmark, if you change the rights of the folder, its subfolders and files also receive the same rights. Without a checkmark, if you change the rights of the folder, the rights of its subfolders and files do not change.

  If you add a folder or file to the folder with this setting, the folder or file does not update with the folder's rights. To receive security updates, the folder or file must be in the folder when the rights change.

- **Replace Rights on existing files**—With a checkmark, if you change the rights of the folder, its files also receive the same rights. Without a checkmark, if you change the rights of the folder, the rights of its files do not change.

  If you add a file to the folder with this setting, the file does not update with those rights. To receive security updates, the file must be in the folder when the rights change.

1.8.11 Working with the IMAP Server and Email

The TeamConnect IMAP server allows you to attach email messages to projects in TeamConnect.

Before you can use this feature, you need to set up a TeamConnect IMAP account on your email client. This TeamConnect IMAP account communicates with TeamConnect allowing it to access Email messages using your email client's IMAP folders.

Then, you may use your email client to drag and drop email from your existing email client folders to TeamConnect IMAP folders. The email messages appear in the TeamConnect documents list pages of the appropriate projects, in the user's **Email** folder **(Inbox)**.

Note: *The TeamConnect IMAP server is compatible with Secure Sockets Layer (SSL), that is, HTTP(S).*

Supported Email Clients

TeamConnect supports the following email clients:

- Microsoft Outlook (2003)
- IBM Lotus Notes (Version 8 and 9)

Before You Begin

Before using an IMAP server with TeamConnect, you must configure the TeamConnect IMAP settings. See the TeamConnect Administrator's Guide for more information.

1.8.11.1 Setting up IMAP Accounts

Before sharing email between any supported email client and TeamConnect, you must add an IMAP email account to your email client. Afterward, you may periodically need to refresh the client's folders view to keep TeamConnect in synchronization with the email client.

This section explains setting up IMAP accounts for the following email clients:

- Outlook
- Lotus Notes

Important: *You may only set up IMAP email accounts in TeamConnect if your administrator has enabled and configured this feature and given you rights to use it. Contact your administrator for information on the setup and configuration of your system.*

1.8.11.1.1 Setting up an IMAP Account in Outlook

Before sharing email between Outlook and TeamConnect, you must add an IMAP email account to Outlook. This section explains how to configure Outlook to connect to the TeamConnect IMAP server. For information about the incoming IMAP and outgoing SMTP mail server configuration values, contact your administrator.

To set up an IMAP account in Outlook

1. Open Outlook to its main window.
2. Choose **Email Accounts** in the **Tools** menu.
3. Select the **Add a new Email Account** option button in the **Email Accounts** dialog box, and then click **Next**.

   The **Internet Email Settings (IMAP)** page displays another set of option buttons.
4. Select **IMAP** in the **Internet Email Settings** dialog box, and then click **Next**.
5. Enter the appropriate values as follows:
   - **Your Name**—Your name as you want it to appear in email message headers.
   - **Email Address**—Your reply-to email address.

     Outlook requires you to enter a value in its Email Address field to save the IMAP account. However, the value does not have to reference a valid email address unless you plan to send email from the account. Contact your administrator with any questions.
   - **User Name**—Your TeamConnect username.
   - **Password**—Your TeamConnect password.
   - **Incoming mail server (IMAP)**—The IP address number or the name of TeamConnect's host machine (for example, 10.2.1.15 as an IP address).
   - **Outgoing mail server (SMTP)**—The name of your SMTP server. If you have no SMTP server, enter some text as a placeholder, for example, general.

Outlook requires you to make an entry its this field to save the IMAP account, but the value does not have to reference a valid SMTP server unless you plan to send email from this account.

6. Select the **Remember password** check-box only.
7. Click **More Settings**.

   An additional **Internet Email Settings** dialog box appears, showing several tabs.
8. Replace the IP address in the **Email Account** field in the **General** tab with an alternative, more meaningful name for your IMAP account, for example, **TC IMAP**. Other entries in this tab are optional.
9. If your administrator set up the TeamConnect IMAP server to use a specific port, select the **Advanced** tab, and then enter the port number in the **Incoming Server (IMAP)** field. Other entries in this tab are optional.

   This port number must match the port number entered for email by your administrator. Make sure your administrator provides the correct number for this field. If this number is incorrect, Outlook is unable to find TeamConnect's email inbox.
10. Click **OK** to close the current **Internet Email Settings** dialog box and save its settings.
11. Click **Next**, and then click **Finish** when you are done.

    A folder with the name of your IMAP server appears in the **Mail** (left) pane. If you did not enter an alternative name in Outlook's email account field, the folder name is the IP address number.

1.8.11.1.2 Refreshing IMAP Folders in Outlook

After Outlook is set up with an IMAP account, your TeamConnect **Email** folder appears in the Outlook **Mail** pane as the IMAP folder's **Inbox**. Each time you open Outlook, the TeamConnect IMAP folder updates with any new information.

This folder contains any current project email folders that you have the rights to see. You may already have Outlook open, then create new folders, such as Disputes, Matters, or Transactions in TeamConnect. In such cases, you must refresh your IMAP folders list and messages to view these folders.

To refresh Microsoft Outlook IMAP folders

In the Outlook Mail navigation pane, right-click the root IMAP account folder (for example, **TC IMAP**) and select **Update Folders List** from the pop-up menu.

For an overview of using and viewing IMAP folders in Outlook, see the appropriate Microsoft Outlook documentation.

1.8.11.1.3 Setting up an IMAP Account with Lotus Notes

Before you can share email between Lotus Notes and TeamConnect, you must add an IMAP email account to Lotus Notes. This section explains how to set up Lotus Notes to connect to the TeamConnect IMAP server. For information about the incoming IMAP and outgoing SMTP mail server configuration values, contact your administrator.

To set up an IMAP account in Lotus Notes

1. Log in to Lotus Notes.
2. From the File menu, select **Preferences**, and then select **Client Configuration Wizard**.
3. Select the **Internet mail servers (POP or IMAP, SMTP)** check-box.
4. Click **Next**.
5. In the **Select the type of server used for retrieving incoming mail** drop-down box, click **IMAP**.
6. In the **Enter a new account name or use the one provided to refer to this server** drop-down box, click **Incoming Internet mail**.
7. In the **Incoming mail server** field, enter the TeamConnect server IP address, such as 10.2.1.15.
8. Click **Next**.
9. Enter your TeamConnect username and password. In the **Account name** field, enter your TeamConnect username.
10. In the **Password** field, enter your TeamConnect password.
11. Click **Next**.
12. Select **Outgoing Internet** mail from the top drop-down list.
13. Enter the **Outgoing SMTP mail server** name in the field.

    Lotus Notes *requires* you to make an entry its this field to save the IMAP account, but the value does not have to reference a valid SMTP server unless you plan to send email from this account.
14. Click **Next**.
15. Enter your **Email address**, if necessary. This value is only used if you want to send email from the IMAP account.
16. Enter your **Internet domain**, if necessary, and then click **Next**.
17. If your administrator set up the TeamConnect IMAP server to use a special computer port, perform the following actions:
    a. From the lower left navigation menu, click the Contacts (or Address Book) icon.
    b. From the **Contacts** left-navigation menu, expand the **Advanced** folder and select **Accounts**.
    c. From the right pane, select **Incoming internet mail - IMAP Online**.

d. Select the **Advanced** tab.

e. Click **Edit Account**.

f. Enter the TeamConnect IMAP server port number in the **Port Number** field.

This port number must match the port number entered for email by your administrator. Make sure your administrator provides the correct number for this field. If this number is incorrect, Lotus Notes is unable to find TeamConnect's email inbox.

g. Click **Save and Close**.

h. Close the contacts view.

1.8.11.1.4 Refreshing IMAP Folders in Lotus Notes

After Lotus Notes is set up with an IMAP account, your TeamConnect email folder appears in the appropriate window. Each time you open Lotus Notes, the TeamConnect IMAP folder updates with any new information.

Note: *Copying email is only supported by Outlook. This feature is not available in Lotus Notes.*

This folder contains any current project email folders you have the rights to see. If you already have Lotus Notes open, and new projects, such as Disputes, Matters, or Transactions, are created in TeamConnect, you must refresh your IMAP folders list and messages to view these folders.

To refresh Lotus Notes IMAP folders and messages

1. From the Lotus Notes **Action** menu, select **Refresh > Folders**. The folders view is updated.
2. From the Lotus Notes **Action** menu, select **Refresh > Summaries**.

   If you rename a folder in Lotus Notes, and the new name does not appear in TeamConnect, edit the **Document Information** page for the folder to update the new name.

For an overview of using and viewing IMAP folders in Lotus Notes, see the appropriate IBM Lotus Notes documentation.

1.8.11.2 Managing Email in Email Clients

After you set up accounts for TeamConnect IMAP with Outlook or Lotus Notes, you may associate any of their email messages with TeamConnect projects using these clients' user interfaces. Use the following guidelines:

- The top-level TeamConnect-IMAP folder appears in the email client with the name you gave it (or the IP address, if you did not give it a different name).
- In the client application, the top-level folder (with the name you gave it or the IP address) contains a folder named **Inbox**. It contains a subfolder for each of the TeamConnect projects you have the rights to view.

- In Lotus Notes, the top-level folder also appears in Outlook and vice versa, if you are using both applications. Both applications use it as their main inbox folder, but it is the same folder in IMAP.
- The top-level IMAP folder appears as your Inbox Folder in TeamConnect, under the name **Email**, when you select the **My Documents** collection in the left pane.
- You may create additional subfolders under the inbox (**Email**) folders, using the client application.
- You may copy or move any email that appears in the client user interface into these folders, as necessary.
- These folders and email messages basically look and act like any others in the client, and you use them in the same way (with some differences, as explained under Differences in Client Operation).

For example, if you copy or drag and drop an email message from your default account Inbox folder to your TeamConnect-IMAP user inbox folder, that message appears in the appropriate TeamConnect documents folder

Important: *TeamConnect does not filter email for spam or viruses. For example, javascript in HTML email is not disabled. Make sure that you have run your corporate email security checks before moving email to TeamConnect.*

Using these standard types of windows operations, you may associate email messages with projects by copying or moving email from your default email account folders to the TeamConnect-IMAP folders in the email client.

1.8.11.2.1 Available Operations

You may perform the following operations using the email client:

- Moving and copying email
- Creating subfolders (under TeamConnect-IMAP folders)
- Deleting email
- Deleting subfolders (under TeamConnect-IMAP folders)

Note: *If you get an "Access denied by ACL" error message when you try to perform an action in the email client, you might not have sufficient rights granted, or you might be attempting to do an action the client does not allow. In such cases, contact your administrator for help.*

1.8.11.2.2 Differences in Client Operation

TeamConnect-IMAP email and folders do have some differences in operation and appearance in Outlook and Lotus Notes. The following list describes these differences:

- The best practice for moving Outlook email to TeamConnect is to copy email messages (press **Control** while dragging and dropping) from Outlook to your TeamConnect-IMAP folder.

- In email clients, deleted messages appear until purged (depending on the client's operation), but the message sender's name and date-time are marked with a strike-through (like this).

1.8.11.3 Using Email in TeamConnect

This section explains how to use, operate, and manage the email documents feature in TeamConnect.

TeamConnect treats email messages as documents. Generally, operations you can perform with documents, you can perform with email except that an email message is read-only unless you download it, which allows you to work with your own copy.

Note: *Using email, you may only perform view-based operations within TeamConnect. Email messages may not be checked out, edited, and checked in.*

1.8.11.3.1 Viewing Email Folders

Use the **Documents** tab to access the TeamConnect-IMAP email feature.

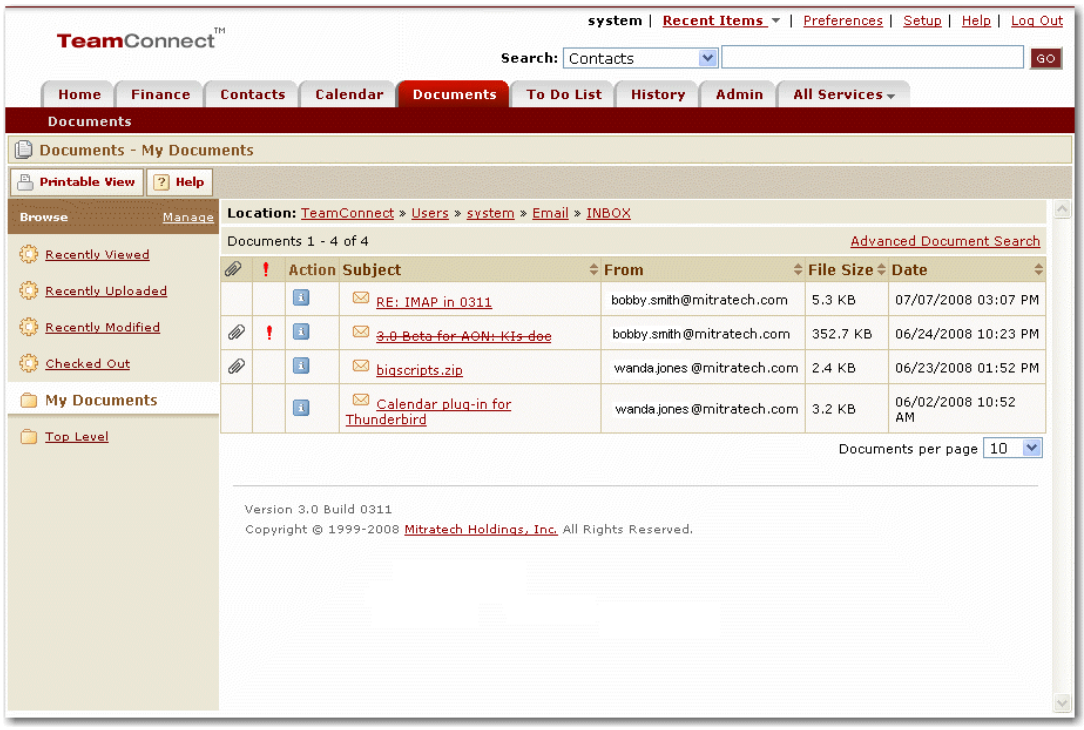
Note: *In the documents **Email** (**Inbox**) folder, you may only view folders you have already created in the client application. Create folders in TeamConnect, which you only want to appear there and not in the client application.*

To open and view email folders

1. Click the **Documents** tab.
2. Click **My Documents** in the left pane.

   The **My Documents** list page appears.
3. Click the **Email** folder in the list.

   The main Email Folder list (inbox) page appears. This page lists the email messages and subfolders in your TeamConnect-IMAP folder, named **Email** in the **My Documents** list page.



Main Email Folder List Page (Inbox)

Outlook shows this folder as your **Inbox** folder.

For a description of the columns in this page, see the table under Email Folder List Page Columns table.

4. If necessary, you may open subfolders by clicking on their names, if any folders appear in this page.

   Navigate through Email Folder list pages using the **Location** bar at the top of each of these pages. For example, if you are in the page with the **Location** bar labeled **TeamConnect > Users > system > Email > INBOX > Assignee**, you may open the **INBOX** folder by clicking on its name. Click **system** to return to the main **Documents** folder.

Email Folder List Page Column Descriptions

The table below contain the default Email fields. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Email Folder List Page Columns

Column	Description
Action	Allows you to access additional information about the message.
Attachment Indicator	Appears when the message has any attachments.

(paper clip)	
Date	Displays the date and time the message was sent.
From	Displays the name and/or email address of the sender.
Priority Indicator: ! (exclamation point)	Indicates the priority of the message.
Size	Displays the size of the message in kilobytes (a sortable column).
Subject	Contains the subject heading of the message. Click this name link to open the message in the TeamConnect email viewer (a sortable column).

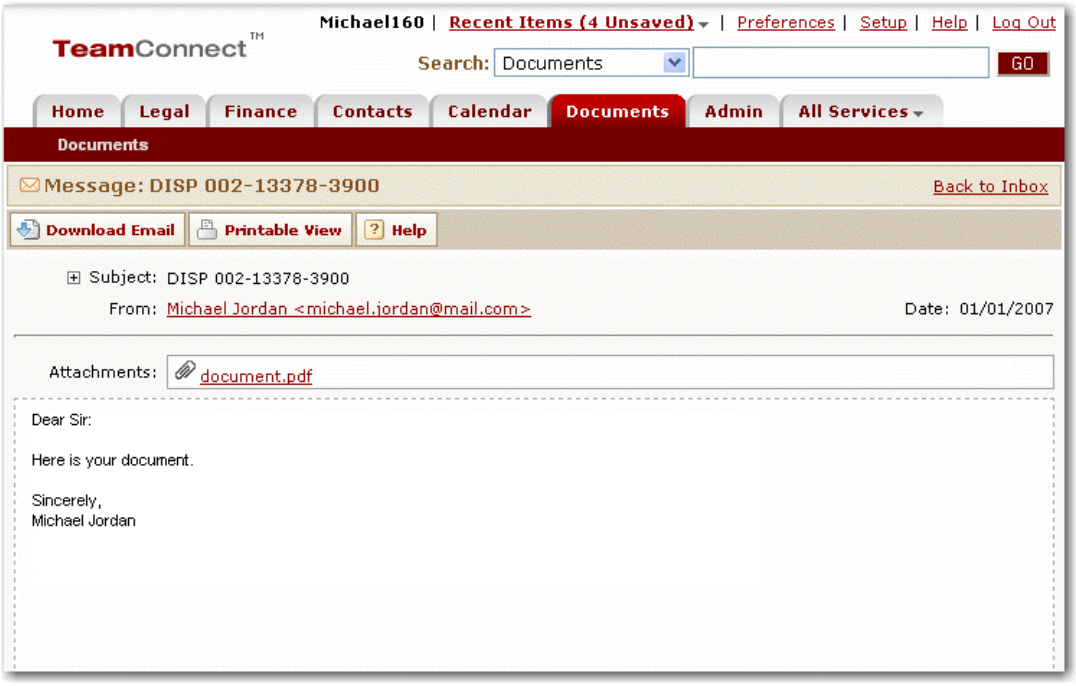
1.8.11.3.2 Viewing Email Messages

Use the Email Folder list page to open and view email messages. For more information on how to use this page, see Viewing Email Folders.

To open and view email messages

1. Click a message **Subject** link name in the Email Folder list page.

   The **Email Message** page appears. This page shows the contents of the current email message. The message subject appears in the title bar of the page.



Open Email in TeamConnect Email Viewer

For a description of the fields in this page, see the table under Email Message Page Fields table.

2. Click **Back to Inbox** to return to the previous Email Folder list page, when you are finished.

Email Message Page Field Descriptions

The table below contain the default fields for the email message page. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Email Message Page Fields

Field or control	Description
Attachments	The filenames of any email attachments. You may click this name link to view or download the attachment.
Date	The date and time that the email was sent.
Download email	Downloads the email as an EML file.
Email body	Displays the contents of the message in HTML format. If the email contains attachments, an estimated attachment size displays.

	Note: *The displayed attachment size may differ slightly from the actual size. The displayed value is based on JavaMail API results.*
From	Displays the message sender's name and/or email address.
Subject	If expanded, displays the message recipients (**To** and **CC** list).

1.8.11.3.3 Searching for Email

Use the **Custom Search** link in an Email Folder list page to search for Email. You may search on a range of dates for creation (when the message was copied or moved into TeamConnect) and the message subject.

To search for email

1. Click the Custom Search link in an Email Folder list page.
2. If you want to search for a task within a specific collection, in the **Search Within** drop-down list, select the collection name or search **All**.
3. Choose an appropriate option in the **Filter** drop-down list to enable a predefined search filter.

   These filters may use any combination of some or all the following criteria, as shown on the page:

   - Filename (subject)
   - Creation date (date range)
4. Enter your search criteria in any of the fields in the previous list, as shown on the page.

   Using a combination of criteria searches on both or all of the criteria, not one or another.
5. If you want to search by email subject, from the **Filename** drop-down list, select **Contains** and enter the email subject In the **Filename** box.
6. Click **Search**.

   The tasks that match your criteria appear in an Email Folder list page view.
7. Click a resulting message name link to view the email content.

1.8.11.3.4 Downloading Email Messages and Attachments

You may download email from an open email message and any attachments in TeamConnect.

Note: *If you download email, you need to have an application installed that can read EML files.*

To download email

1. Click the **Download Email** button.
2. Follow the instructions provided by your browser.

   The file downloads.
3. The message icon or name appears in the location where you downloaded the EML file.

To download email attachments

1. From an open email message in TeamConnect, click the filename link in **Attachments**.
2. Follow the instructions provided by your browser.

   The attached file downloads.
3. The attachment's icon or name appears in the location where you downloaded the file.

1.8.11.3.5 Deleting Email

You can delete an email and its attachments.

To delete email

1. Navigate to the folder page that lists the message you want to delete.
2. Select to the left of the message subject name.

   The **Document Information** section for the message appears. For more information on this page, see the table under Document Information Section table.

   Note: *The document type for an email message is always* ***Standard Email****.*
3. Click **Delete** in the toolbar and click **Yes** in the confirmation box.

   The message is deleted and removed from its folder list page.

1.8.11.3.6 Deleting TeamConnect-IMAP Subfolders

You can delete a TeamConnect-IMAP subfolder that you created, from using the folder page where it resides. The email messages within that subfolder are also deleted.

To delete TeamConnect-IMAP subfolders

1. Navigate to the folder page that lists the subfolder you want to delete.
2. Click to the left of the folder name.

   The **Properties** page for the folder appears.
3. Click **Delete** in the toolbar and click **Yes** in the confirmation box.

The subfolder is deleted and removed from its folder list page.

Note: *If you delete the TeamConnect **Email** folder with Outlook, refresh the folder list in TeamConnect as necessary. Then, you must exit and reopen Outlook to see the change in Outlook. However, it is a best practice not to delete the **Email** folder while running and connected to the IMAP server.*

1.8.11.3.7 Email Security

This section assumes that you are familiar with Records security and explains the differences between email security and general records security. For more information on record security features, see Working with Record Security.

Note: *The prerequisite rights for working with email and email folders must be set up by your administrator. Contact your administrator for more information.*

Tips and Cautions

You may change email message and email folder-level rights as follows:

- By default, TeamConnect-IMAP folders and their subfolders are public. You may set them to private in the same way as you would any other document folder.
- By default, TeamConnect-IMAP subfolders (that you or other TeamConnect users create) are set to apply the subfolder security rights to email messages in that subfolder. If you restrict rights to update or delete a TeamConnect-IMAP subfolder and apply those rights recursively (to email and subfolders) you prevent other users from deleting email within that folder and its subfolders.
- By default, email messages in TeamConnect are public. You may set them to private in the same way as you would any other document.
- For email messages, **Read** and **Delete** rights can be enabled or disabled for other users. For email messages, **Update** and **Perm** rights are inactive.
- If you do not see expected email folders or messages, or you are unable to complete expected actions, verify that you have the rights listed in the table in this section. Afterward, if you still experience issues, contact your administrator.

To access email message or folder Security pages

1. Open and display the folder or message page.
2. Click to the left of the message or folder name.

   The **Document Information** section for the message or the **Properties** page for the folder appears. For more information on this page, see the table under Document Information Section.
3. Click **Security** in the left pane.

The **Security** page appears. Use this page in the same way as you would any other **Security** page. See Working with Record Security for details.

The following table summarizes the rights (message and folder-level) required to work with email messages and folders:

User Operation in Email Client	Required Rights in TeamConnect
View email	**Email folder/subfolder**: View **Email message**: View
Move email from non TeamConnect-IMAP folder to TeamConnect- IMAP folder	**Email folder/subfolder**: View, Edit
Move email between TeamConnect-IMAP folders	**Email folder/subfolder**: View, Edit, Delete **Email record**: View
Delete email	**Email folder/subfolder**: View, Delete **Email record**: View
Change email attributes (priority, view/ unview)	**Email folder/subfolder**: View, Edit **Email record**: View
Add TeamConnect-IMAP subfolder	**Email folder/subfolder**: Edit
Rename / Delete TeamConnect-IMAP subfolder	**Email folder/subfolder**: View, Delete

You may control email security rights at the folder or email message level, as necessary, denying other users rights, for example to delete or edit.

To control email message or folder rights

1. Navigate to either:
   - The appropriate TeamConnect-IMAP folder or subfolder page
   - The appropriate Email Message page
2. Click **Security** in the left pane.
3. Click to edit the page.
4. Click **Add New Item** under Group Rights.

5. Select the group you wish to restrict from the drop-down list under Group, and then perform the following actions:
   - From the **Option** drop-down list, select **Deny**.
   - Select the appropriate check-boxes for the actions you want to deny, for example, **Delete** or **Edit**.
6. Repeat the previous steps, as necessary, for each message or folder you want to restrict.
7. Select a save option when you are finished.

1.8.11.3.8 Using the Share Feature

You may share TeamConnect email messages with other users in the system by sending them a link to any message.

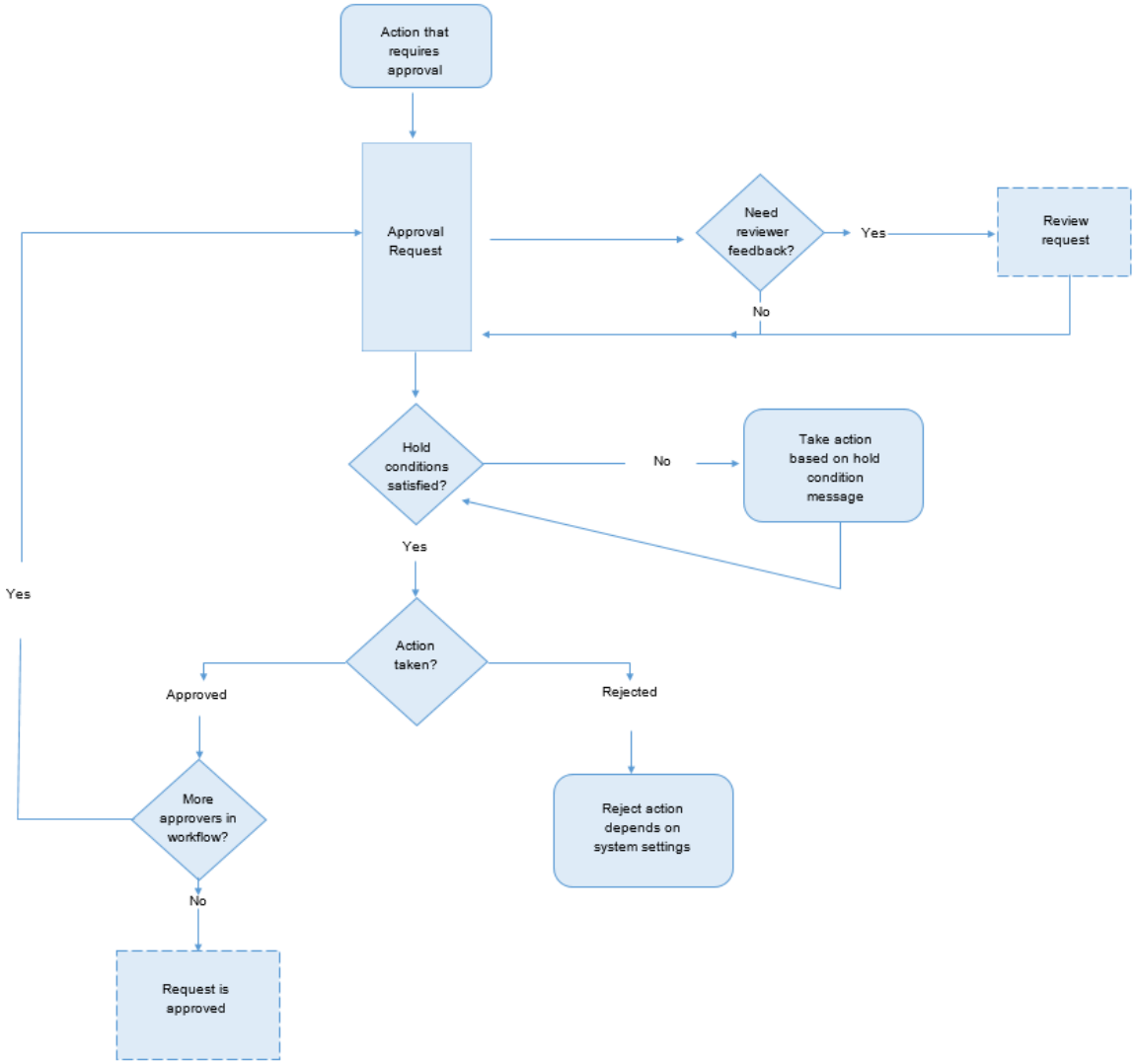
1.9 Workflow Processes

Approval processes in TeamConnect provide structure and enforcement for your workflow. For example, a request to post an invoice might automatically route from staff members to a manager, and then to a director for approval, before it is posted to the appropriate budgets. At each stage in the workflow, one or more users are responsible for specific activities.

A workflow process has the following different types of users.

Workflow User	Description of User	Page with User's Requests
Requestor	Users who submit the request by completing an action that requires an approval.	**Active Requests** page of **My Requests**
Approvers	Users who approve or reject the request.	**Requests to Approve** page of **My Approvals**
Reviewers	Users who evaluate the request.	**Requests to Review** page of **My Approvals**
Process Manager	Users who see all requests in workflow processes and have the authority to make workflow decisions.	All pages of **My Workflow Processes**

When your system has workflow processes in place, a user (as the requestor) triggers an approval process by performing an action. Examples of this type of action include posting an invoice, changing the phase of a project, or deleting a record. This trigger creates an approval request, causing the record to become part of a workflow process, as shown in the following flowchart.



Workflow Process (TeamConnect 4.0.8+)

A workflow process can have one or more stops. Each stop consists of one or more users who must approve the approval request. Users may also reassign the request or add additional stops prior to their approval. Workflow routes can also be subject to route conditions or hold conditions set in place.

If the process continues with successful approval and the request does not expire or get rejected, the original action finally executes.

If no active user is part of a stop, the following situations determines the outcome.

Situation When No User is Part of the Stop	Situation Outcome
The stop only requires one member's approval.	The workflow process skips the stop and continues to the next stop.

	The skipped stop is not listed on the approval schedule, but you can view the details on the approval history.
The stop requires all members for approval.	An error message appears. Depending on how the process is defined, if an approver rejects the request anywhere along the approval route, one of the following outcomes occur: • The request is rejected and the requestor is notified. • The request is sent back to the approvers in the first stop. • The request is sent to the process manager, who determines the action to take.

In addition to the pages and processes described in this topic, each individual record is associated with a **Workflow** page. Users with rights to open a record can view the workflow process history. The **Workflow** page is not editable.

1.9.1 Using the Approval Schedule and Approval History

Within records that require an approval process, TeamConnect provides two different views of the approval process: approval schedule and approval history.

Approval Schedule

The **Approval Schedule** displays as a status of all assigned approvers for the entire process. The status information is useful for checking how much progress a request has made, in the context of the whole route. By reviewing the approval status, you can learn how many stops are in the process, who the approvers are in each stop, and whether each approver has approved or rejected the request.

If the Process Manager made any reassignments, you can also view this information in the approval status.

	Request Name	Requestor	Request Date	Expiration Date	Status
▼	Invoice for 4,065.00 USD	Yoritz, Ronald	7/17/08	7/24/08	Pending

Stop	Performer	Status	Action Date	Expiration Date	Internal Comment
1	Walker, Carol	Pending		7/24/08 2:21 AM	
	Kruger, Mary	Pending		7/24/08 2:21 AM	
2	Torres, Daniel	None			
	Walker, Carol	None			
	Hu, Anita	None			
	Joe, Sarah	None			
	Welch, Rosie	None			
3	Walker, Carol	None			
	Finch, Larry	None			
	Clouds, Steve	None			
	Hu, Anita	None			

Approval Schedule Example

Note: *If it appears that a number is skipped in the* ***Stop*** *column, it may mean that there are no assignees with the specified on the selected record. The details of the skipped stop appear in the approval history.*

For each active request, the approval status displays in the following locations:

- On the **Workflow** page, in the **Active Requests** section while a request is still pending approval.
- On the **General** page, the record displays the **Pending Approval** status on its toolbar, where it can be seen by the requestor while the request is pending approval.

Record Pending Approval Message

Note: *Once a request is completed—approved, rejected, or canceled—the approval schedule no longer displays in the record. Instead, you can view the approval history.*

The following table lists the fields in the **Approval Schedule** section. Fields are listed in alphabetical order.

Approval Schedule Field Descriptions

Field/Button	Description
Request Section	

Expiration Date	(optional) The expiration date of the request. The expiration action is based on options set by your system administrator.
Request Date	The date that the request was triggered.
Request Name	The type of action being requested.
Requestor	The name of the user who is responsible for sending a record into an approval process.
Status	The current status of the entire request. Options are as follows: • **Pending**—The request remains in this status until all stops are complete. • Other possible statuses include Rejected, Error, or Canceled.
Stop Section	
Action Date	The date on which the action occurred.
Expiration Date	The date by which the approver must submit a decision.
Internal Comment	The reason that the request is approved or rejected, if necessary. This information is originally entered in the Internal Comment field when the action is approved or rejected.
Performer	The members of this stop who may approve or reject the request. Clicking this link opens this user's contact record.
Status	The current status of the approval on the stop route. Possible options are as follows: • **Pending**—The request remains in this status until all stops are complete. • **Approved**—This stop is approved by all members and moves on to the next approval stop on the route. • **Rejected**—Someone on this stop did not approve this action. • **Error**—The stop contains an error, such as a member in this stop is assigned a role that does not exist. You can review the history to view the error, and then make the appropriate corrections. • **Canceled**—This stop on the route is canceled. • None or empty field—This request has not reached this stop.

	Note: *Your system administrator may provide additional statuses.*
Stop	The approval rule check points where members and groups are assigned to handle a request, such as wanting to post an invoice. The route follows the order in which you organize the stops, starting with Stop 1.

Approval History

The **Approval History** section records each event as it occurs during the approval process on the **Workflow** page of records. Once a request is completed—approved, rejected, or canceled—the complete approval history for that process displays in the **Completed Requests** section. Events that are tracked in the approval history include the following:

- Requestor cancels the request.
- Approver approves or rejects the request.
- Approver sends for review.
- Reviewer submits review.
- Approval time expires.
- Approval request is sent back to first stop by Process Manager (restarted).
- Process Manager assigns another user or reassigns the same user.
- Process Manager returns request to requestor (rejects).
- Request is automatically approved or rejected upon expiration.
- Error that a user is not found for a certain role or path in the system.
- Error that a user group assigned to approve is empty.
- Error that a user assigned to approve is inactive.

	Item	Request Name	Requestor	Request Date	Completion Date	Comment	Outcome
▶	1	Invoice for 4,065.00 USD	Yoritz, Ronald	7/8/08	7/8/08		Cancelled
▼	2	Invoice for 4,065.00 USD	Yoritz, Ronald	7/8/08	7/17/08		Rejected

Stop	Performer	Activity	Date	Internal Comment
1	Kruger, Mary	Rejected via expiration	7/17/08 12:38 AM	
2	Torres, Daniel	None		
	Joe, Sarah	None		
	Welch, Rosie	None		
	Hu, Anita	None		
3	Hu, Anita	None		
	Clouds, Steve	None		
	Finch, Larry	None		

Approval History Example

1.9.2 Setting Up Email Approvals

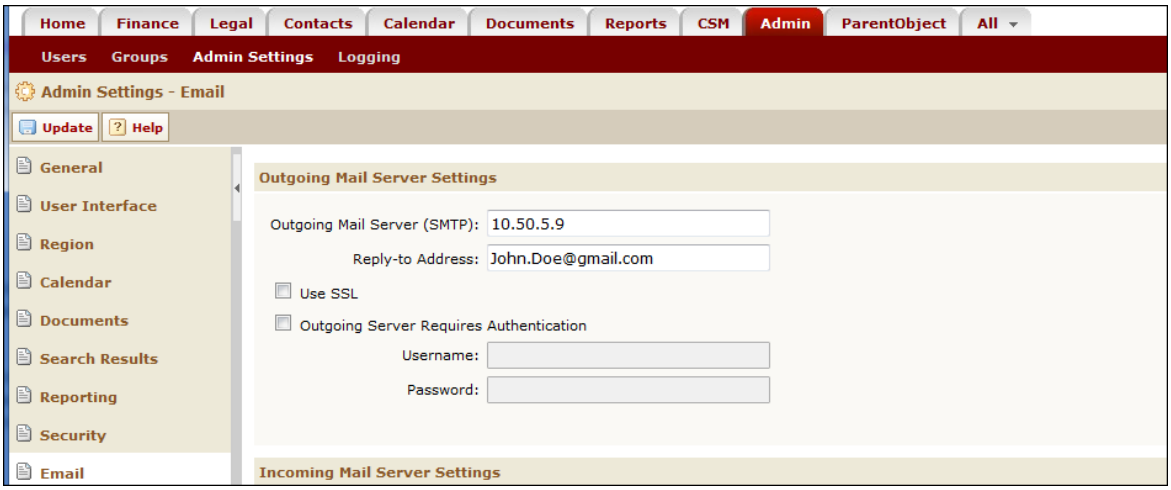
Users are able to receive and reply to email notifications in order to approve and move items through workflow. The details below outline the settings necessary for *TeamConnect Admins* to enable this feature.

Important: Email approvals may not function as some versions of Outlook include line breaks on any line with more than 76 characters. Users with Outlook 2010, 2013 and later versions will need to make the following adjustments to their Outlook configuration for email approvals to function:

1. Click on the File tab and select Options.
2. Click on “Advanced” in the left column of the Options window.
3. Scroll down to the “International Options” section.
4. Change “Preferred encoding for outgoing messages” to “Unicode (UTF-8)”.
5. Click “OK” at the bottom of the Options window.
6. Restart Outlook.

Admin Settings to Enable Email Approvals

Click the **Admin** tab and select **Email** from the left side navigation pane.



Enabling Email Approvals

Outgoing Mail Server Settings

- **Outgoing Mail Server (SMTP)**: Your company's mail server, ex. 10.50.5.9
- **Reply-to Address**: The email address listed here will be the "from" address users see when receiving email notifications. For example, if it's set to John.Doe@gmail.com and Betty receives an approve/reject email, it will appear as if it was sent from John.Doe@gmail.com.

You'll need to make sure that mailto: links are enabled for the mail server and that the approve/reject emails are formatted correctly. The "Use SSL" and "Outgoing Server Requires Authentication" options are not required for email approvals to function.

Note: This has only been tested on Gmail, Outlook and hMail. Do not use Hotmail or Yahoo Mail.

Incoming Mail Server Settings

This block signals TeamConnect where to acquire and read the responses to approve/reject emails.

- **Account Type:** IMAP (Internet Message Access Protocol) This allows email clients to access email on a remote mail server, which is ideal for cases where the mailbox is managed by multiple users.
- **Incoming Mail Server:** The incoming mail server is the server associated with your email address you'll use to read the emails from. You'll enter "imap.(insert your mail server here).com".

For example, Gmail accounts will say "imap.gmail.com".

- **Username:** This is the email account from which the email approve/reject email responses will be read. An example address format could be "Jane.Doe@gmail.com". TeamConnect reads the emails sent to this account about once a minute, so it is important to not manually open any emails at this account. For this reason, it is suggested to enter an account that is not used. If this email is used for other purposes than email approvals, make sure to not open the approval responses. After TeamConnect processes the email approval responses, they will appear as "read" messages.

IMPORTANT: Do not use Hotmail or Yahoo! mail. You'll need to make sure that mailto: links are enabled for the mail server and that the approve/reject emails are formatted correctly. This has only been tested on Gmail, Outlook and Hmail.

- **Password:** This needs to be the actual password for the email account used in the above username field. If it's not correct TeamConnect will be unable to log-in remotely to the IMAP email account, i.e. cannot read the approval response emails.
- The checkbox next to 'Use SSL/TLS' must be checked.

Additional Settings Needed Outside of TeamConnect

1. The Incoming Mail Server needs to have IMAP enabled. If you go into the settings within the email account you want to use for the incoming mail server, they should have a button/option/tab/etc that will allow you to enable IMAP. For example, Gmail users can:

i. Sign in to Gmail.

ii. Click the gear in the top right .

iii. Select Settings.

iv. Click Forwarding and POP/IMAP.

v. Select Enable IMAP.

vi. Click Save Changes.

2. Two ports need to be opened on your computer - the port numbers needed are dependent on the mail servers you use for outgoing and incoming. This can be found by a simple google search of your mail server and IMAP settings. For Mitratech employees, it's port 25 (outgoing) and port 993 (incoming gmail).

3. Make sure that at the very bottom of the Admin Settings > Email 'Status:" you have selected **Start**.
4. Stop and restart the app server after making all changes.

1.9.3 Using Approval Process Email Notifications

TeamConnect sends email to requestors, approvers, reviewers, and process managers to notify them of certain events.

If your administrator has given you access to set your email notification preferences, you can select which emails you want to receive on the **Email Notifications** page of your Preferences. This page provides you with options for receiving emails related to your approval requests, in addition to other types of notifications.

There are certain email notifications that are set by administrators on a per-process basis. These emails are automatically sent when those events occur. You do not have the option to receive them or not. For example, if you need to be involved in certain approval processes but you are not necessarily an approver, the process may be set up to keep you notified of approvals and rejections.

To receive email notifications, your email preferences must be set appropriately. For more details, see Setting Up Email Notifications.

Workflow Email Notification Types

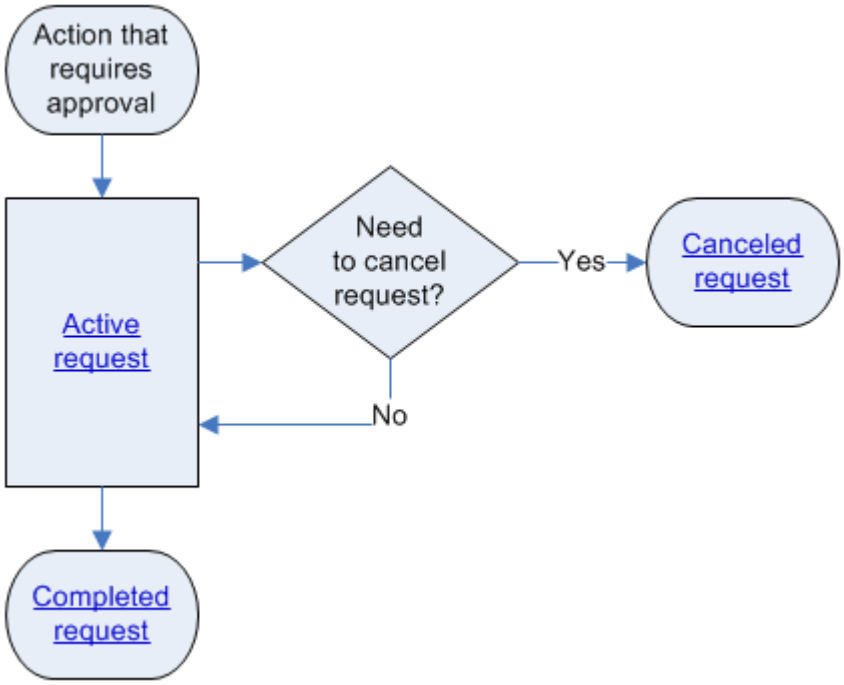
Your role in workflow	Events that can trigger email notifications	Optional email notification setting	Set by administrator for each process
Any user in the system, such as a supervisor	A request is rejected		x
	A request is approved		x
	An error occurs in a process		x
Requestor	Your request is approved	x	
	Your request is rejected	x	
Approver	You receive a request for approval	x	
	Your review request is returned to you	x	
	A request for approval is going to expire	x	

	A request for approval in your list is canceled	x	
Reviewer	You receive a request for review	x	
Process Manager (all members of the group assigned to Process Manager role)	An error occurs in a process	x	
	A route or stop expires	x	
	A request is rejected	x	

1.9.4 Submitting Requests for Actions that Require Approval

If you are responsible for sending a record into an approval process, you are considered the requestor in the approval process. For example, if you click **Post** in an invoice record, and the invoice must be approved before it posts, then you are the requestor who triggered an approval process for that invoice.

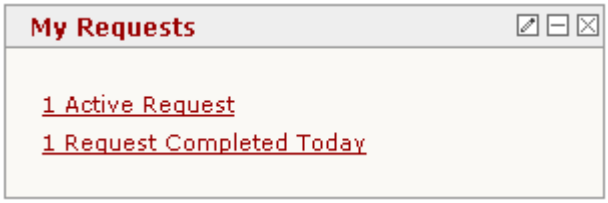
The following flowchart shows the life cycle of a request from the requestor's point of view. Click areas of the flowchart for more information.



As a requestor, you can easily track both your active requests and the requests that are completed (approved or rejected). You also have the ability to cancel an approval request once it is sent. To receive emails about the status of your requests for approval, you can set approval process email notifications.

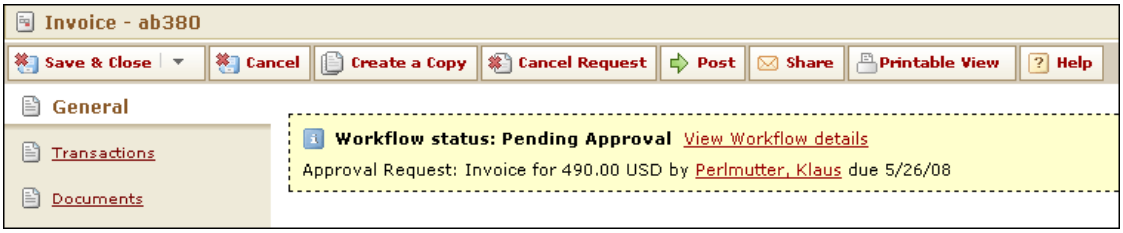
You can view the status of the records for which you have requested some kind of approval in the following ways:

- Select **Requests** from the **All** drop-down list on the tab bar to open **My Requests**. If your home page has a **My Requests** portal pane, you can also click one of the links that summarizes the status of your requests to open **My Requests**.



My Requests Portal Pane

- Open the record of a request, which displays the status on its toolbar. From that record, you can click the **Workflow** page for a list of active requests and completed requests.



Record Pending Approval Status

1.9.4.1 Viewing Your Active Requests

The requests for approval that you submitted are summarized on the **My Requests** page. Requests that are not approved or rejected yet appear in the **Active Requests** section.

To view your active requests

1. From the **All** tab, open the **Requests** page.

   The **Active Requests** page provides you with a summary of the status of each request.

Active Requests Section of My Requests Page

2. If necessary, click **Show Filter** to enter search criteria, and click **Search** to display only certain types of requests for a record type.

Note: *You can also open a record and click the* ***Workflow*** *page to track the approval schedule of a request.*

Active Requests Section of My Requests Page

Field/Button		Description
Search		This drop-down list filters the list of results on this page. Choose a specific record type from the drop-down list so that only records of that type appear in the list of results. After making your selections, click **Search** to filter the results. If a search filter appears, enter search criteria and click **Search** again.
Show Filter/Hide Filter		This link shows or hides the search criteria that you can use to find a certain type of request for a record type.
Search Filter ***Note:*** *The search filter only appears if one is specified for the record type you select.*	**Field**	The name of the field you want to search.
	Operator	The option that describes the criteria that you want to use to further narrow your results. See Operators for more information.
	Value	The value you enter that the search uses to return specific results.
	Search	The button that you click to execute the search.
	Clear Values	The link that you click to remove all values from the search
	Reset to Default	The link that you click to reset all operators and values to the default fields.
Active Requests table ***Note:*** *Different fields may appear depending on your*	**Record**	Click to open the record for which you submitted an approval request. Examples of records include an invoice, project, document, or expense. In the record page, you can view the approval status. Depending on how the approval rule is defined, you may not be able to edit the record while it is pending approval.

system settings.	**Request**	The name of the approval request.
	Submitted	The date on which you submitted the request.
	Expected Completion Date	The date by which the approval process should be completed. Depending on how the approval process is defined in the approval rule by administrators, and what happens during the approval process, the expected completion date could change to a later date.
	Days Remaining	The number of days remaining in the approval process, based on the expected completion date.
	Stop	The current stop of the approval process. For example, if there are three stops in the approval route, and the approvers in the first stop already approved the request, then the approval is in stop 2 of 3.
Cancel		Click to cancel the selected request or requests. For details, see Canceling Approval Requests. ***Caution:*** *Be careful not to click this button when you want to close the* ***My Requests*** *page. You may accidentally cancel any selected approval requests.*

1.9.4.2 Viewing Your Completed Requests

The requests for approval that are completed are summarized on the **My Requests** page. You can view the approved or rejected requests in the **Completed Requests** section. This section also lists requests that you canceled.

The **Completed Requests** section (the Completed Requests Section of My Requests Page image) provides you with a summary of each approved, rejected, and canceled request. The **Action** column indicates the final status of the request.

To view your completed requests

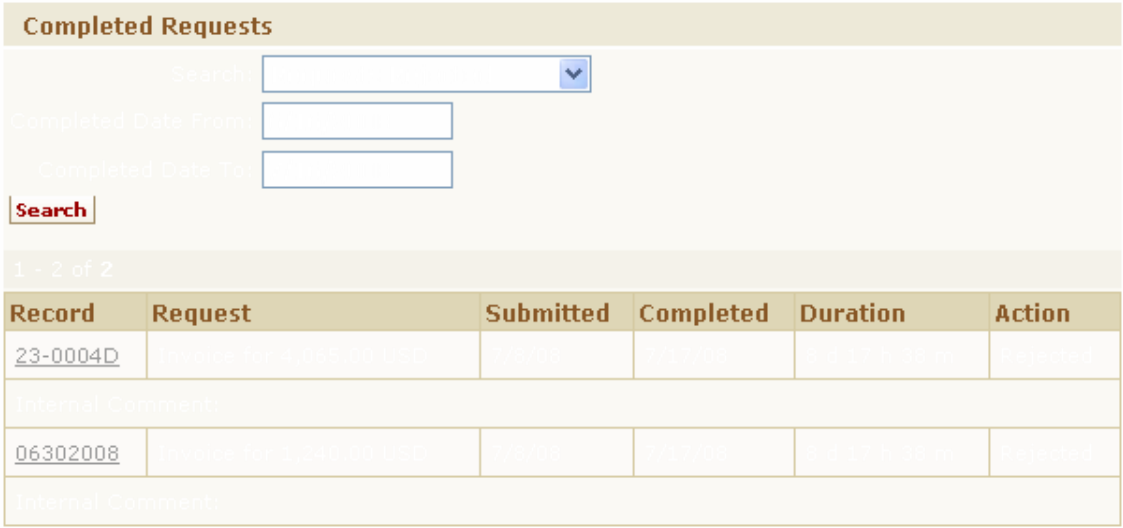
1. From the **Tools** tab, open the **My Requests** page.

   The **My Requests** page opens.

2. Click the **Completed Requests** page.

3. In the **Search** drop-down list, select which requests you want to view, depending on how they were completed or resolved:
   - **All Requests Completed**—Requests that have been approved, canceled, or rejected.
   - **Requests Approved**—Requests that were fully approved by the approvers in the route as well as requests that were automatically approved when the route expired.
   - **Requests Canceled**—Requests that you canceled.
   - **Requests Rejected**—Requests that were rejected by an approver in the route, returned to you by the Process Manager, or automatically rejected when the route expired.
4. Using the **Completed Date From** and **Completed Date To** date fields, select the date range for completion that you want to view.
5. Click **Search**.

   The list of your completed requests displays.



Completed Requests Section of My Requests Page

Note: *You can also open a record and click the* ***Workflow*** *page to track the approval history of a request.*

Completed Requests Section of My Requests Page

Field/Button	Description
Search	This drop-down list filters the list of results on this page by the reasons for request completion. After making your selections, click **Search** to filter the results.
Completed Date From	The date that specifies the earliest completion date to appear in the search results. Select the to specify a date.

Completed Date To		The date that specifies the latest completion date to appear in the search results. Select the to specify a date.
Completed Requests table	**Record**	Click to open the record for which you submitted an approval request.
	Request	The name of the approval request.
	Submitted	The date on which you submitted the request.
	Completed	The date that the approval process completed.
	Duration	The number of days the request was in the approval process before completion.
	Action	A description of the action that caused the approval process to complete.

1.9.4.3 Canceling Approval Requests

You can cancel an approval request if you need to make a modification in the record before sending it for approval. You can cancel an approval request only if you submitted the request. You can cancel a request from these locations:

- In the record itself (such as an invoice), from the record toolbar.

  An approval status section is displayed in a record only when you have submitted an approval request. Approvers, reviewers, and Process Managers also see this section in the record, but it is displayed with slightly different information.

- On the **My Requests** page.

To cancel an approval request in the individual record page

1. Select **Requests** from the **All** drop-down list on the tab bar.

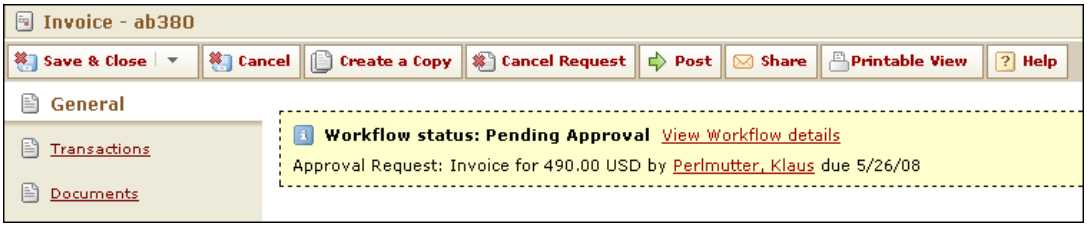
   The **My Requests** page is displayed.

2. Click the **Active Requests** link (see the Active Requests Section of My Requests Page image).

3. Click the **Record** hyperlink of the request that you want to cancel.

   The record opens with the **General** page displayed.

4. In the record toolbar, click **Cancel Request**. (Note that only you, the requestor, will see this button in the toolbar. Other users cannot see it.)



Approval Requests Section in Your Requested Record

5. In the confirmation message that is displayed, click **Yes**.

   The system automatically makes a date and time entry when the request was canceled and updates the status of the request to "canceled" on the **Workflow** page.

   The approval request is removed from approvers' work lists.

   Note: A cancellation email will only be sent to the user who put the record into workflow.

6. If necessary, make any needed modifications and resubmit your request for approval.

To cancel approval requests on the My Requests page

1. Go to the **My Requests** page using the hyperlinks in the **My Requests** portal pane, or by selecting **My Requests** from the **All** drop-down list on the tab bar.
2. The **My Requests** page is displayed.
3. Click the **Active Requests** link (see the Active Requests Section of My Requests Page image).
4. Select the check-box next to each request that you want to cancel.
5. Click **Cancel** Cancel.

   The selected requests are canceled and removed from approvers' work lists.

1.9.5 Approving, Rejecting, and Reviewing Requests

After a requestor completes an action that sends a record into an approval process, one or multiple approvers become assignees of the approval request. In addition to approving or rejecting a request, the approver can send the request to someone else to review. Users may also add an additional approval before and/or after approving the request.

1.9.5.1 Approving or Rejecting a Request

As an approver for certain processes defined in TeamConnect, you are responsible for approving or rejecting requests from other users to complete certain operations. For example, you may be an approver for invoice, task, or expense posting, or deletion of records.

Depending on how the approval rule is defined, you may be able to edit the record while it is pending approval, even if all stop members are required for approval. If the stop requires only one approver, you become the only approver for the stop for this request.

If you and the other approvers at the current stop do not make a decision before the expiration date of the request, the request will be automatically approved, rejected, or sent to the Process Manager, depending on the settings made on the administrative side of TeamConnect.

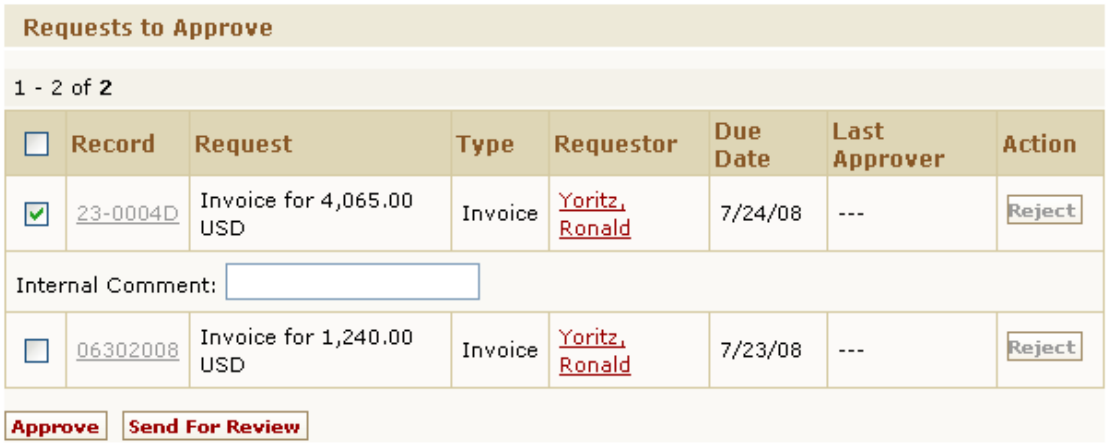
The **My Approvals** page provides you with a central location where you can manage your tasks as an approver for approval processes.

You can access the **My Approvals** page in one of the following ways:

- Click one of the hyperlinks in the **My Pending Approvals** portal pane on your home page.

My Pending Approvals Portal Pane

- Select **Approvals** from the **All** drop-down list on the **Main** menu, which opens the Requests to Approve page.



Requests to Approve Page of My Approvals

You can approve or reject requests routed to you for authorization in the following ways:

- From the **My Approvals** page.
- From the record for which the request has been made.
- From an email about the request if your system allows approval through email.

The following events occur after you approve and reject a request.

What Happens after You Approve or Reject

Approver's	On the My Approvals	On the Workflow page of the record	To the event that created the request	To people who receive

Action	pages			notifications
Approve	TeamConnect removes the request from your **Requests to Approve** list. If the approval stop requires only one approval, TeamConnect also removes the request from other approvers in the same stop and sends requests to approvers in the next stop.	Your approval displays in the **Approval History** of the record with your internal comments. Other approvers, reviewers, the Process Manager, and the requestor can view the Approval History in the **Approval Requests** section of the record.	**If the request requires no other approvers.**	
			The requested action (such as invoice posting) takes place.	The requestor is notified by email (if email notifications are set up accordingly). Depending on the route settings, other users may also receive notification emails.
Reject	TeamConnect removes the request from approvers in the same stop.	Your rejection displays in the **Approval History** of the record with your internal comments. Other approvers, reviewers, the Process Manager, and the requestor can view the Approval History in the **Approval Requests** section of the record. The comments that you wrote for the requestor displays in the **Comments to Requestor** field under the **Approval Requests** section of the record. If you rejected the posting of an invoice, your **Reason for**	The requested action (such as posting an invoice) does not take place.	Depending on your system settings, the request is sent to the Process Manager, the requestor, or approvers in the first stop of the approval route.

		Rejection and **Comments to Requestor** display in the invoice's **Comments to Vendor** field		

For details about setting your email notifications to receive emails about your requests for approval, see Setting Up Email Notifications.

1.9.5.1.1 Approving or Rejecting from My Approvals

The **My Approvals** page allows you to approve or reject multiple requests at once without opening each request individually. If necessary, you can also approve or rejecting requests within individual records.

To approve requests from the My Approvals page

1. Open the **My Approvals** page from the link in the **My Approvals** portal pane or by selecting **Approvals** from the **All** drop-down list on the **Main** menu.

   The **Requests to Approve** page displays with a list of requests. If necessary, select the **Record** drop-down and click **Search** to display only certain record types.

2. Click the **Approve** button in the **Action** column of the request(s) you want to approve.

   If batch approval is enabled for your system, you can click **Approve** below the table to approve all the selected requests.

3. The **Confirm Approval** popup appears. Enter the reason for approving the request(s) in the **Internal Comment** field. You can enter up to 2000 characters, including spaces.

4. Click **Confirm Approval**.

Several things occur after you approve a request, as described in the What Happens after You Approve or Reject table.

To reject requests from the My Approvals page

1. Go to the **My Approvals** page using the link in the **My Approvals** portal pane on your home page or by selecting **Approvals** from the **All** drop-down list on the **Main** menu.

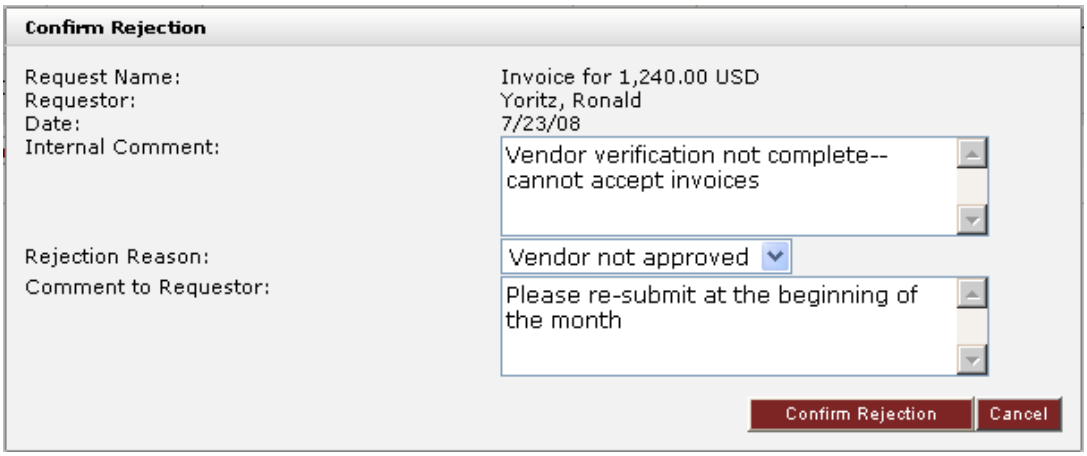
   The **Requests to Approve** page displays with a list of requests. If necessary, select the **Record** drop-down and click **Search** to display only certain record types.

2. Click the **Reject** button in the **Action** column of the request(s) you want to approve.

   If batch approval is enabled for your system, you can click the **Reject Selected** button below the table to reject all the selected requests.

   The **Rejection Confirmation** window displays. Depending on whether this is the final rejection of the request and whether the request is for an invoice record, you may see up to

three fields: the **Internal Comment** field, a **Rejection Reason** drop-down list, and a **Comments to Requestor** field.



Rejection Confirmation Window

3. Enter the reason for rejecting the request(s) in the **Internal Comment** field. These comments display in the **Approval History**.
4. If the **Rejection Reason** field displays, select a rejection reason.
5. If the **Comments to Requestor** field displays, enter comments. You can enter up to 2000 characters, including spaces.
6. Click **Confirm Rejection**.

Several things occur after you reject a request, as described in the What Happens after You Approve or Reject table.

Requests to Approve Page of My Approvals

Column or Control	Description
Record	This drop-down list filters the list of results on this page. Choose a specific record type from the drop-down list so that only records of that type appear in the list of results. After making your selection, click **Search** to filter the results. If a search filter appears, enter search criteria and click **Search** again.
Default	The field that you use to select a record type as the default records that appear when you open the **Requests to Approve** page. Click **Select** to save the default record type.
Show Filter/Hide Filter	This link shows or hides the search criteria that you can use to find a certain type of request for a record type.

Search Filter ***Note:*** *The search filter only appears if one is specified for the record type you select.*	**Field**	The name of the field you want to search.
	Operator	The option that describes the criteria that you want to use to further narrow your results. See Operators for more information.
	Value	The value you enter that the search uses to return specific results.
	Search	The button that you click to execute the search.
	Clear Values	The link that you click to remove all values from the search
	Reset to Default	The link that you click to reset all operators and values to the default fields.
Requests to Approve table ***Note:*** *Different fields may appear depending on your system settings.*	**Record**	The record for which a user has submitted an approval request. For example, the record could be an invoice or some other type of record. Click the record's hyperlink to view it.
	Request	The name of the request that has been submitted. The request name indicates the type of action being requested. If the record is an invoice, the invoice amount is part of the request name.
	Type	The type of record on which a request was submitted (such as an invoice). This column does not appear if you select a record from the **Record** drop-down.
	Requestor	The name of the user who triggered the approval request. Click to open the user's contact record.
	Due Date	The date by which the approval request expires. If the approver performs no action before this date, TeamConnect automatically approves, rejects, or sends the request to the Process Manager, depending on how the system's approval rule. Click the column heading to sort your approval list according to the expiration date. This column does not appear if the **Days Pending Action** column is present.

	Days Pending Action	The number of days before the approval request expires. This column does not appear if the **Due Date** column is present.
	Last Approver	The name of the last approver that manually approved the request.
	Action	Click the **Approve** button to approve a request. Click the **Reject** button to reject a request.
Approve Selected		The button you use to approve multiple requests at the same time. Select the check-boxes of one or more requests before clicking this button. This button only appears if your system administrator enables batch approval.
Reject Selected		The button you use to reject multiple requests at the same time. Select the check-boxes of one or more requests before clicking this button. This button only appears if your system administrator enables batch rejection and you select one type of record from the **Record** drop-down list.
Send for Review		Click this button to send the approval request for review to one or more other users. You can send more than one request for review at one time by selecting multiple check-boxes. See Sending Approval Requests for Review.

1.9.5.1.2 Approving or Rejecting Within Records

Instead of approving or rejecting requests from the **My Approvals** page, you can open records that are pending your approval, review them, and make your decision directly on the record page.

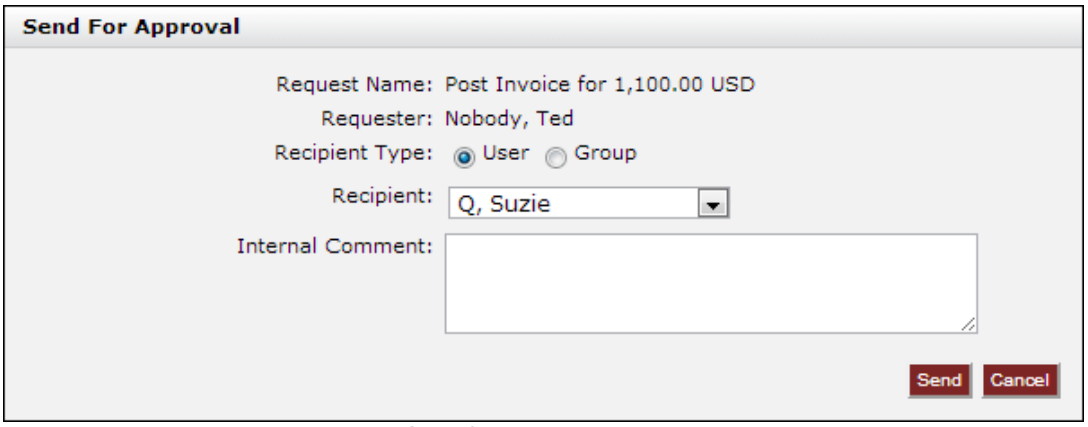
Depending on how the approval rule is defined, you may be able to send a request to another user to approve before making your decision.

To send the request to another user before you approve

1. Click the **Send for Approval** button. Your system administrator can enable this button to display.

Send for Approval Button

The **Send for Approval** popup appears.



Send for Approval Popup

2. From **Recipient Type**, select whether you want to send the request for review to a **User** or **Group**.
3. From **Recipient**, select the user or group to whom you want to send the approval request.
4. In the **Internal Comment** field, type any comments that you want the approver(s) to receive regarding this request. You can enter up to 2000 characters, including spaces.
5. Click **Send**.

If the new approver(s) approve the request, the request returns to you and you can approve or reject. If the new approver rejects the request, the reject action occurs.

To approve a request from within the record

1. Go to the **My Approvals** page using the hyperlink in the **My Approvals** portal pane or by selecting **Approvals** from the **All** drop-down list on the **Main** menu.

   The **Requests to Approve** page displays.

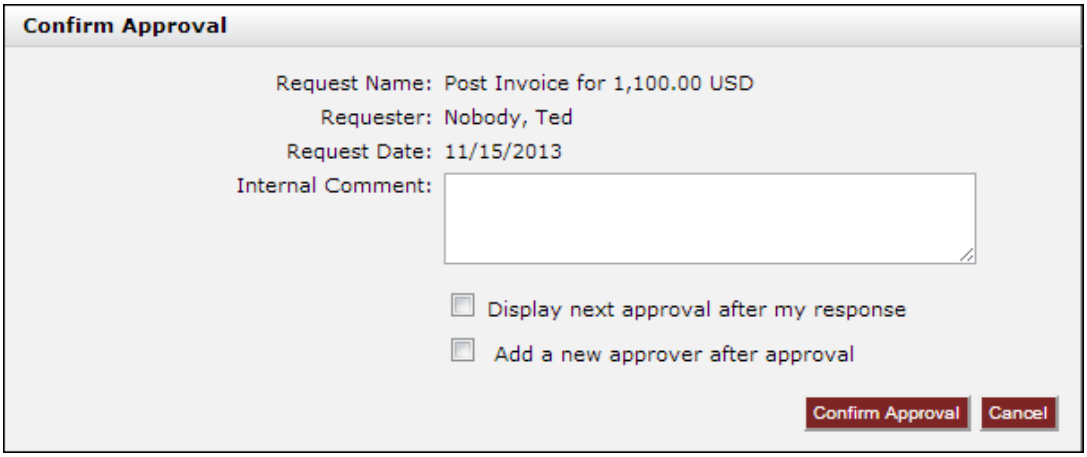
2. Click the **Record** hyperlink of the record that you want to approve or reject.

   The record opens in Read-only mode and displays the **General** page. The **Approve** button is available on the record toolbar.

   Note: *Depending on how the approval rule is defined, you may be able to send the record to someone else to review before you make your decision. For details, see Sending Approval Requests for Review.*

3. Click **Approve** from the record toolbar.

   The **Confirm Approval** window opens.



Confirm Approval Popup Example

4. Enter your comments in the **Internal Comment** field. These comments will be recorded in the **Approval History**.

   You can enter up to 2000 characters, including spaces, in this field.

5. If **Display next approval after my response** displays, click its check-box if you want the next request in your queue to open automatically when you click the **Confirm Approval** button.

6. If **Add a new approver after approval** displays and you want to send the approval request to another user or group, select this check-box.

   After you select the check-box, specify the **User** or **Group**.

Adding a New Approver After Approval

7. Click **Confirm Approval**.

If you clicked the **Display next approval after my response** check-box, the next request in your queue opens for your action.

If not, you may click the **Previous Record** link or the **Next Record** link to move to another record in your queue.

For additional details about approving a request, see the What Happens after You Approve or Reject table.

To reject a request from within a record

1. Go to the **My Approvals** page using the hyperlink in the **My Approvals** portal pane or by selecting **Approvals** from the **All** drop-down list on the **Main** menu.

   The **Requests to Approve** page displays.

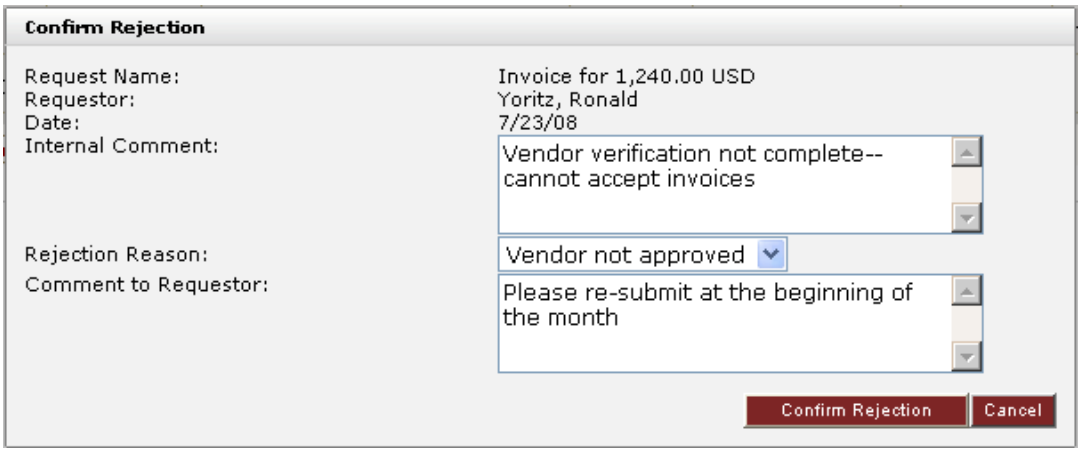
2. Click the **Record** hyperlink of the record that you want to approve or reject.

   The record opens in Read-only mode and displays the **General** page. The **Reject** button is available on the record toolbar.

   Note: *Depending on how the approval rule is defined, you may be able to send the record to someone else to review before you make your decision. For details, see Sending Approval Requests for Review.*

3. Click **Reject** from the record toolbar.

   The **Confirm Rejection** window opens.



Confirm Rejection Popup

4. Enter your comments in the **Internal Comment** field. These comments will be recorded in the **Approval History**.

   You can enter up to 2000 characters, including spaces, in this field.

5. If the **Rejection Reason** field displays, select a rejection reason for the invoice.

6. If the **Comment to Requestor** field displays, enter comments about the rejection.

   You can enter up to 2000 characters, including spaces, in this field.

7. Click **Confirm Rejection**.

For additional details about rejecting a request, see the What Happens after You Approve or Reject table.

1.9.5.1.3 Approving or Rejecting through Email

If your system administrator has allowed approval and rejection through email, you receive an email when you have a request to approve.

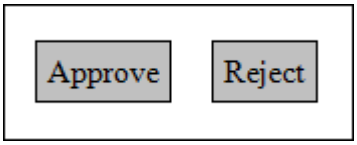
To approve or reject a request from an email

Note: *Clicking the* ***Approve*** *or* ***Reject*** *buttons in the email you receive does not automatically approve the request. You must send the second email that opens to complete the action.*

1. When you receive an approval request email, review the contents of the email to determine what action to take next.

   You should not respond to this email.

2. Click the **Approve** or **Reject** button in the email.



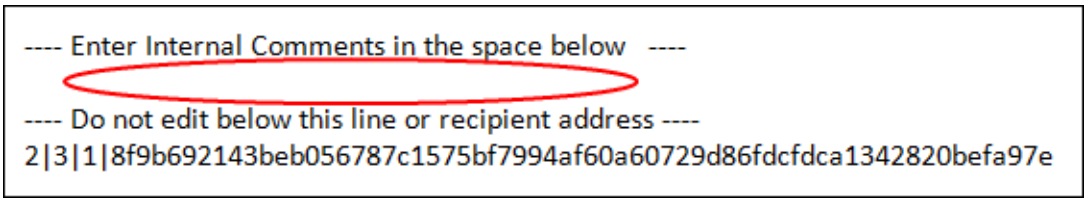
Example of Buttons in Email

Note: *Mailto links must be enabled for your email client for these buttons to work when you click them. You cannot enable mailto links for hotmail accounts.*

3. A new email opens with **[Approved]** or **[Rejected]** and the name of the request in the subject of the email.

   Enter **Internal Comments** and **Comments to the Requestor** in the spaces provided if necessary.

   If your system requires internal comments and you do not enter comments, you receive an error in the form of another email.



Enter Internal Comments in the Space Provided

4. Click the **Send** button on the email.

   The request is not approved or rejected until you send the email.

After you approve or reject a request, it no longer appears in your list on the **Requests to Approve** page of **My Approvals**.

If a workflow stop requires only one approver, another approver might have already approved or rejected the request when you try to approve it through email. If you approve or reject a request after another approver has completed an action, your action and comments do not go through and you receive an error email.

1.9.5.1.4 Sending Requests for Review

As an approver, you may want to request feedback from one or more TeamConnect users about whether to approve or reject a request.

Note: *The the approval rule that defines the approval process must be configured for you to have the ability to request reviews.*

After the reviewer submits the review request, you receive their comments in an email (if you are able to receive email notifications). The reviewer's comments also display in the record's Approval History.

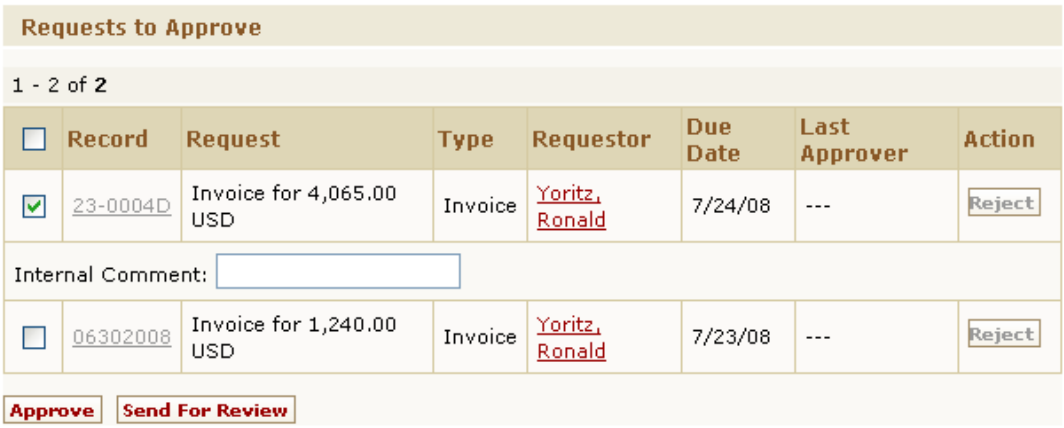
If the stop has more than one possible approver but requires only one approval to move to the next stop, you become the only approver for the stop in this request when you send the request for review. You cannot send the request for review if all members of the stop must approve.

Note: *If you send a request for review, you must still approve the request by the original expiration date.*

To request a review of a single record pending your approval

1. Open the **My Approvals** page by clicking its link in the **My Approvals** portal pane or by selecting **My Approvals** from the **All** drop-down list on the **Main** menu.

   The **Requests to Approve** page displays.



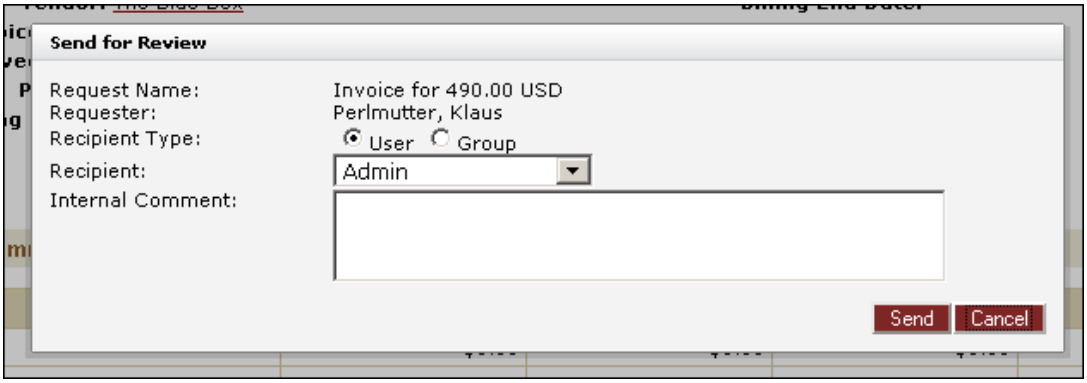
Requests to Approve Page

2. Click the **Record** link of the request that you want to send for review.

   The **General** page of the record is displayed.

3. Click **Send for Review** in the record toolbar.

   The **Send for Review** window appears.



Send for Review Window

4. In the **Send for Review** window, in the **Internal Comment** field, type any comments that you want the reviewer(s) to receive regarding this request. You can enter up to 2000 characters, including spaces.
5. Select whether you want to send the request for review to a user or group.
6. Select the user or group to whom you want to send the review request.
7. Click **Send**.

   The following events occur:

   - A message appears at the top of the browser window: "Review Request Sent".
   - The reviewer receives an email, if email notifications are set accordingly.
   - The request displays in the reviewer's **My Approvals** portal pane and **Requests to Review** section on the **My Approvals** page.
   - The request for review is recorded in the record's Approval History.

To send multiple approval requests for review

1. Go to the **My Approvals** page using the hyperlink in the **My Approvals** portal pane or by selecting **Approvals** from the **All** drop-down list on the **Main** menu.

   The **Requests to Approve** page displays.
2. Select the check-boxes next to the approval requests that you want to send for review. As you click check-boxes, the **Internal Comment** field appears for each clicked request.
3. For each request, type any comments that you would like the reviewer(s) to receive in the **Internal Comment** field. You can enter up to 2000 characters, including spaces.
4. Click **Send For Review**.

   The **Send for Review** window opens.
5. Select whether you want to send the request for review to a user or group.
6. Select the user or group to whom you want to send the review request.
7. Click **Yes**.

The following events occur:

- The reviewer receives an email, if email notifications are set accordingly.
- The request is displayed in the reviewer's **My Approvals** portal pane and **Requests to Review** section on the **My Approvals** page.
- The request for review is recorded in the record's **Approval History**, including your comments.
- If not all members of your approval stop are required to approve, then the approval request is removed from the other approvers' work lists.

8. If you want to send the records to any other users, repeat steps 2 through 7.

1.9.5.2 Reviewing a Request

The approver of a request may want someone else to review the request first. If an approver asks you to review a request, you can provide comments, but you cannot actually approve or reject the request unless you are an approver in the process.

All your review requests appear on the **Requests to Review** page of **My Approvals**, which you can access in one of the following ways:

- Click the **Pending Review** hyperlink in the **My Pending Approvals** portal pane on your home page.

My Pending Approvals Portal Pane

- Select **Approvals** from the **All** tab, which opens the **Requests to Review** page.

Requests to Review

1 - 2 of **2**

Record	Type	Request	Requestor	Expiration Date	Approver	Message	Action
23-0004D	Invoice	Invoice for 4,065.00 USD	Yoritz, Ronald	7/28/08	Walker, Carol	This is under $5000 so should be OK	Submit Review
inv0613_01	Invoice	Invoice for 155.00 USD	Yoritz, Ronald	7/27/08	Walker, Carol	Have we approved this vendor?	Submit Review

Requests to Review Section of My Approvals Page

If your email notifications are set, you can be notified through email when you receive a request for a review. For details about setting your email notifications to receive emails about review requests, see Setting Up Email Notifications.

You can submit your reviews either from the **My Approvals** page or within the individual records while you are viewing them.

After you submit a review, you can find a record of the review in the Approval History of the record. As the reviewer, if the record is still pending approval after you review it, you may not be able to see the **Approval History**.

Before you submit a review, a review may no longer appear in your reviews request list in the following cases:

- The user who made the request (the requestor) cancels it.
- The request is approved, rejected, or expired, and is therefore no longer in the current approval stop.
- The approver who sent the request is reassigned by the Process Manager.

1.9.5.2.1 Reviewing from My Approvals

The **My Approvals** page allows you to submit multiple reviews at once, to quickly move reviews out of your work list. Or, you can submit them one at a time.

You can also submit reviews directly within the requested records, as described in Submitting Reviews Through Individual Records.

To submit reviews from the My Approvals page

1. Go to the **My Approvals** page using the hyperlink to your pending reviews in the **My Approvals** portal pane or by selecting **Approvals** from the **All** drop-down list on the **Main** menu.
2. Click the **Requests to Review** link, if that section is not already displayed.

   The list of reviews that have been requested from you is displayed.
3. Type your review comments in the **Comment to Requestor** field for each selected request. You can enter up to 2000 characters, including spaces.
4. Click **submit review**.

Your reviews are sent to the approver who requested it in an email, if emails are set accordingly, and is recorded in the record's **Approval History**, where the approver can view it directly in the record.

Requests to Review Section of My Approvals Page

Field/Button	Description
Record	Indicates the record on which there is a pending action for which an approver has requested your review. For example, the record could be an invoice, document, or some other type of record. Click the record's hyperlink to view it.
Type	The type of record for which the request was submitted.

Request	The name of the request that has been submitted. The request name indicates the type of action being requested. If the record is an invoice, the invoice amount is part of the request name.
Requestor	Displays the name of the user who triggered the approval request. Click to open the user's contact record.
Expiration Date	The date by which the approver must submit his or her decision. In order to give the approver time to consider your feedback, submit your review some time before this date.
Approver	The approver who requested a review from you.
Message	Comments from the approver who is requesting a review from you.
Submit Review	Click this button to submit a review for a request. A window will open, allowing you to enter comments.
Internal Comment	Type your review feedback before clicking submit review. You can enter up to 2000 characters, including spaces.

1.9.5.2.2 Reviewing Within Records

It may be easier for you to submit a review while you are viewing the record for which a request has been made, such as an invoice.

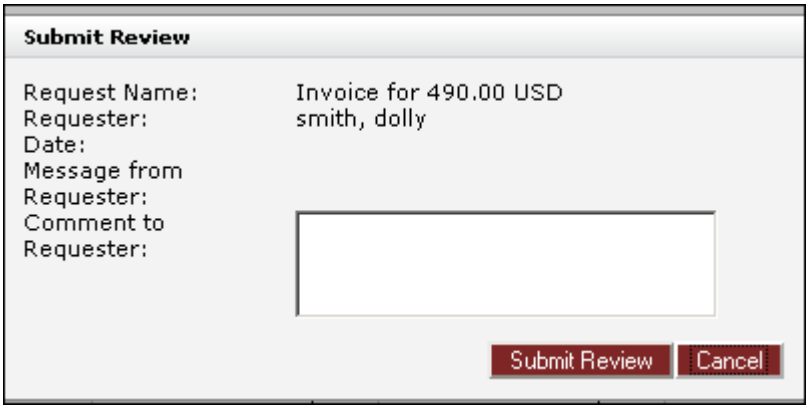
To submit your review through a requested record

1. Go to the My Approvals page using the hyperlink to your pending reviews in the **My Approvals** portal pane or by selecting **Approvals** from the **All** drop-down list on the **Main** menu.
2. Click the **Requests to Review** link, if that section is not already displayed.

   The list of reviews that have been requested from you is displayed.
3. Click the **Record** hyperlink of the record that you want to review.

   The record opens with its **General** page displayed.
4. Click **Submit Review** in the record toolbar.

   The **Submit Review** window opens.



Submit Review Window

5. Type your feedback in the **Comment to Requestor** field. You can enter up to 2000 characters, including spaces.
6. Click **Submit Review**.

Your review is sent to the approver who requested it in an email, if emails are set accordingly, and is recorded in the record's **Approval History**, where the approver can view it directly in the record.

1.9.6 Making Workflow Decisions

As a Process Manager, you are responsible for keeping approval processes flowing smoothly through the organization.

A Process Manager only needs to take action when the situations in the following table occur:

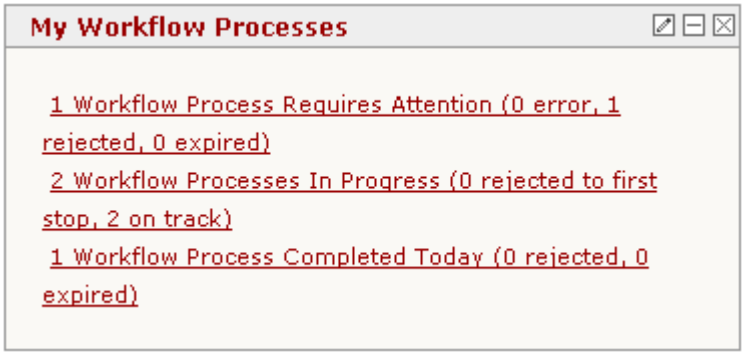
Situation	How Process Managers Handle the Situation
Requests have errors	• Reassign an approver in the workflow process • Restart the workflow process • Return the workflow process to requestor • Return requests with errors to workflow
Requests expire	
Requests have been rejected	
Actions that create requests fail	• Restart the workflow process • Re-execute the action of the workflow process that failed
Requests require replacing an approver	• Temporarily reassign an approver in the workflow process • Permanently reassign an approver in the workflow process

Requests need to move in workflow without being approved or rejected	• Moving Requests Forward in a Process • Reassigning a Request

The **My Workflow Processes** page provides a central location where you can manage your tasks as a Process Manager for approval processes, also called workflow processes.

To access the **My Workflow Processes** page, do one of the following:

- Click one of the hyperlinks in the **My Workflow Processes** portal pane on your home page.
- Select **Workflow Processes** from the **All** drop-down list on the tab bar.



My Workflow Processes Portal Pane

The **My Workflow Processes** portal pane on your home page displays a summary of the processes in progress for which you are responsible. For example, if you have four processes in progress, the second hyperlink in the portal pane may say, **2 Workflow Processes In Progress (0 rejected to first stop, 2 on track)**.

1.9.6.1 Monitoring Current Requests

The list of current processes that you are responsible for as a Process Manager is available on the **In Progress** and **Attention Required** pages of **My Workflow Processes**. The **In Progress** page list processes with no issues. The **Attention Required** page lists processes with errors, expirations, or rejections.

From the **In Progress** and **Attention Required** pages, you can redirect the approval route of a request in one of the following ways:

- Reassign an individual request.
- Restart the approval process.
- Return the approval request to the requestor.

You can determine the issue for requests on the **Attention Required** page from the **View Log** button. The table below describes your options for resolving each type of issue.

Resolving Process Issues

Route Status	Log text	Description of issue	Options for resolving these issues

Error	`Error: User <name> inactive`	Approver's user account is inactive but their approval is required in the route.	• If the request must continue through the specified approval route, contact an administrator for help in resolving the issue with the user or group in the approval route. Then, you can restart the process. See Restarting Processes. • *Reassign* the approval to another user or group. See Sending Approval Requests for Review. • *Return the request to the requestor.* This is a final rejection. Administrator intervention may still be needed if you resubmit the request. See Returning Requests to Requestors.
Error	`Error: User with .lineItemList.project.mainAssignee.user not found`	A user with a particular role or involvement with the record must approve, but there is no such user. For example, a request must be approved by the main assignee of a matter, but there is no main assignee.	
Error	`Error: Group <user group name> empty`	No users in a group that is part of the approval route.	
Stop Expired	`Expired`	You receive notification that a stop has expired. Stop expirations are only sent to you if specified in the approval rule.	• *Reassign* the approval to another user or group. See Sending Approval Requests for Review. • *Restart* the process by sending it to the first stop in the approval route. See Restarting Processes. • *Return the request to the requestor.* This is considered a final reject, so the user would have to re-submit the request to start a new approval process. See Returning

Route Expired	`Expired`	You receive notification that an entire route has expired. Route expirations are only sent if specified in the approval rule.	Requests to Requestors.
Rejected	`Rejected`	Rejections are sent if specified in the definition of the process. The user who rejects the request may provide comments to help you resolve the issue.	

Attention Required and In Progress Pages Field Descriptions

Field/Button	Description
Search (**Attention Required** page only)	Select whether you want to view **All Processes**, **Errors**, **Expirations**, or **Rejections**.
Record Drop-Down List	In the drop-down box, select a specific system, project, involved, or milestone approval type that you want to display, and then click **Search**. To further refine the search results, in the adjoining text box, enter identifying text that will help you locate the appropriate approvals, and then click **Search**. You can enter all or part of the identifying text as follows: • **Accounts or Documents**—The name of the account or document • **Appointments**—The subject of the appointment • **Contacts** or **Involveds**—The first or last name of the contact or involved party • **Expenses**, **History**, **Tasks**, **Line Items**, or **Milestones**—A short description of the expense, history, task, line item, or milestone • **Invoice**—An invoice number • **Projects**—The name or number of a project If you leave this box blank, the returned results will be all of the approvals that match the selected record type.

Show Filter/Hide Filter		This link shows or hides the search criteria that you can use to find a certain type of request for a record type.
Search Filter ***Note:*** *The search filter only appears if one is specified for the record type you select.*	**Field**	The name of the field you want to search.
	Operator	The option that describes the criteria that you want to use to further narrow your results. See Operators for more information.
	Value	The value you enter that the search uses to return specific results.
	Search	The button that you click to execute the search.
	Clear Values	The link that you click to remove all values from the search
	Reset to Default	The link that you click to reset all operators and values to the default fields.
Attentions Required/In Progress table ***Note:*** *Different fields may appear depending on your system settings.*	**Record**	Lists the record for which a user has submitted an approval request. For example, the record could be an invoice, matter, document, or some other type of record. Click the record's hyperlink to view it.
	Type	The type of record for which a request was submitted (such as an invoice or matter).
	Request	The name of the request that has been submitted. The request name indicates the type of action being requested. If the record is an invoice, the invoice amount is part of the request name.
	Requestor	Displays the name of the user who triggered the approval request. Click to open the user's contact record.
	Approval Rule	Displays the name of the approval rule that defines the approval process. If you have the appropriate administrative rights, you can view the details of the rule by clicking the rule's hyperlink. This can help you understand the approval process in order to troubleshoot an issue.

	Route Status	Indicates the status of the process. On your **Attention Required** page, the status could be: • **Rejected** • **Stop Expired** • **Route Expired** • **Error** On your **In Progress** page, all processes listed are **On Track** or **Rejected to First Stop**. In either case, this means that the process does not currently require you to take any action as the Process Manager. However, processes that were rejected to the first stop may need to be reviewed by you because an issue caused the approval process to begin again.
	Days in Route	Indicates how many days have passed since the beginning of the process.
	Days Remaining	Indicates how many days are left in the approval process, based on the approval rule. Depending on how the approval rule is defined, this could be based on a total number of days for the route, or the total number of days allotted for each stop.
	Action	• **View Log** —Click this button to view the log of events or activities that have occurred as part of the approval process. The log lists the following information for each event: ○ **Stop**—The stop in the approval route at which the event occurred. ○ **Performer**—The user who performed the activity. ○ **Activity**—For example, Sent to Process Manager, Expired, Reassigned, or Sent for Review. ○ **Date/Time**—The date and time of the event. ○ **Internal Comment**—Comments entered by reviewers, approvers, or the Process Manager for events. You can enter up to 2000 characters, including spaces.

		• **Reassign** —Click this button to open the **Reassign** page and reassign the approvals to other users. Reassignment is one option for resolving process issues. For details, see Reassigning Processes.
Restart		Select a process and click **Restart** to start the approvals over again at the first stop in the route. Restarting is one option for resolving process issues. For details, see Restarting Process.
Return to Requestor		Select a process and click **Return to Requestor** to reject the request and discontinue the approval process. Returning the request to the requestor is one option for resolving process issues. For details, see Returning Requests to Requestors.

1.9.6.2 Reviewing Completed Requests

The **Completed Requests** page of **My Workflow Processes** provides you with a list of all completed requests that you can view as a Process Manager.

A process is considered completed when it is approved, rejected, or canceled. You cannot restart, reassign, or return completed requests.

To review completed processes

1. Go to the **My Workflow Processes** page using the hyperlinks in the **My Workflow Processes** portal pane or by selecting **Workflow Processes** from the **All** drop-down list on the tab bar.
2. Click the **Completed Requests** page.
3. In the **View** drop-down list, select which processes you want to view, depending on how they were completed or resolved:
   - **All Requests Completed**—All requests that are approved, canceled, or rejected.
   - **Requests Approved**—Requests that approvers in the route approved by the approvers in the route and requests that automatically approved when the route expired.
   - **Requests Canceled**—Requests that the requestor canceled.
   - **Requests Rejected**—Requests that an approver in the route rejected, requests that the process manager returned to the requestor, or requests that TeamConnect rejected when the route expired.
4. Using the **Completed Date From** and **Completed Date To** date fields, select the date range for completion that you want to view.

5. Click **Search**.

The list of processes refreshes to provide you with the filtered list of completed processes.

Completed Requests Section of Workflow Processes

Field/Button		Description
Search		This drop-down list filters the list of results on this page by the reasons for request completion. After making your selections, click **Search** to filter the results.
Completed Date From		The date that specifies the earliest completion date to appear in the search results. Select the to specify a date.
Completed Date To		The date that specifies the latest completion date to appear in the search results. Select the to specify a date.
Completed Requests table	**Record**	Click to open the record for the approval request.
	Request	The name of the approval request.
	Requester	The name of the user who trigger the action that created the request.
	Rule	The record and rule type that triggered the action that created the request.
	Start Date	The start date of the approval process.
	Completed	The date that the approval process completed.
	Action	A description of the action that caused the approval process to complete.

1.9.6.3 Returning Requests to Requestors

As a Process Manager, you may need to return a request for approval to the requestor. Returning the request to the requestor is considered a rejection of the request. If the requestor submits the request again after you have sent it back, a new approval request process begins.

To return a request to the requestor

1. Go to the **My Workflow Processes** page using the hyperlinks in the **My Workflow Processes** portal pane or by selecting **Workflow Processes** from the **All** drop-down list on the tab bar.
2. Locate the process that you need to return to the requestor on the **Attention Required** page or the **In Progress** page.
3. Select the process that you want to restart. You can select more than one.

   The **Internal Comment** field displays.
4. Enter a message to the requestor regarding your cancellation of the request. You can enter up to 2000 characters, including spaces.
5. Click **Return to Requestor**.

   The **Return Request** dialog box opens, confirming that you want to return the request to the requestor.
6. Click **Yes**.

Returning a request has the following results:

- The request is not complete. For example, if the request was to post an invoice, the invoice is not posted.
- The request appears on the **Completed** page of the **My Workflow Processes** page with the status **Rejected**.
- The request for approval no longer appears on the list of the approvers' pending requests in their **My Approvals** page.
- Depending on email settings, the requestor may be notified that their request was rejected.

1.9.6.4 Reassigning Individual Requests

As a process manager on the **My Workflow Processes** pages, you can reassign a request from one approver to another in the following situations:

- A request is not yet completed (**In Progress** page).
- A request has an error (**Failed Actions** page).
- A request expired (**Attention Required** page).
- A request has a rejection (**Attention Required** page).

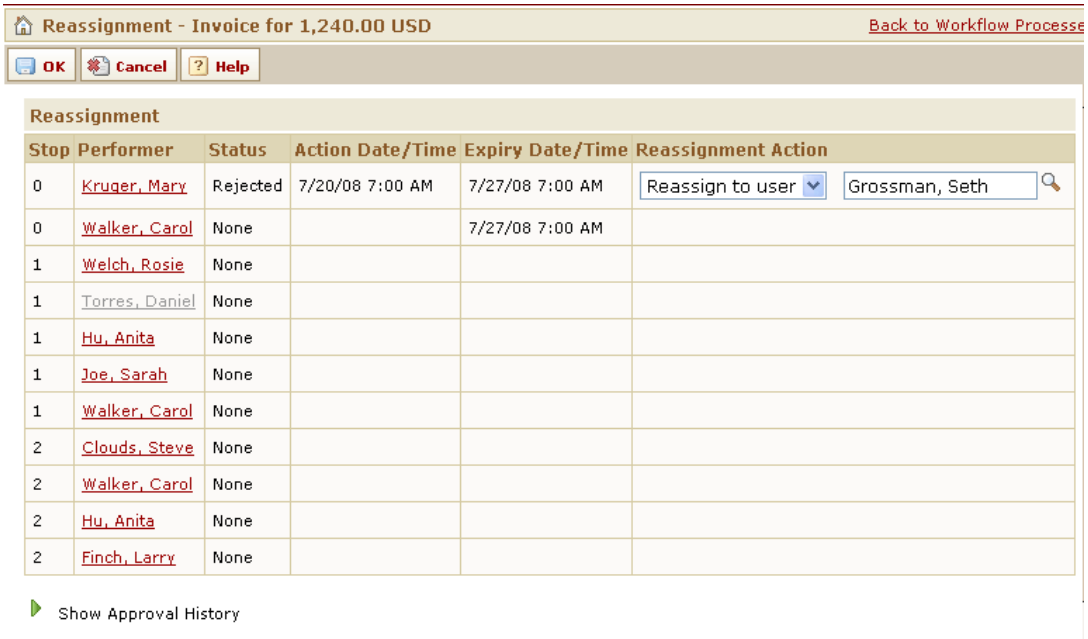
To reassign a process

1. Go to the **My Workflow Processes** page using the hyperlinks in the **My Workflow Processes** portal pane or by selecting **Workflow Processes** from the **All** drop-down list on the tab bar.
2. Click **Attention Required** or **In Progress**, depending on whether the process has an issue or not.

The list of processes is displayed.

3. Click the **Reassignment** icon for the process that you want to reassign.

   The **Reassignment** page displays for that process.



Reassignment Page

4. For each stop where reassignment is necessary, select the **Reassignment Action** and then select the user to whom you want to reassign the approval request.

   If you are reassigning an expired process or stop to the same user, select **Assign again**.

   If necessary, click **Show Approval History** to review the previous events in the process.

5. When you finish selecting assignees, click **OK**.

   The new approvers are notified of the request in their **My Approvals** page, and receive an email if their notifications are set accordingly.

   The reassignment now appears in the request log when you click the **View Log** icon.

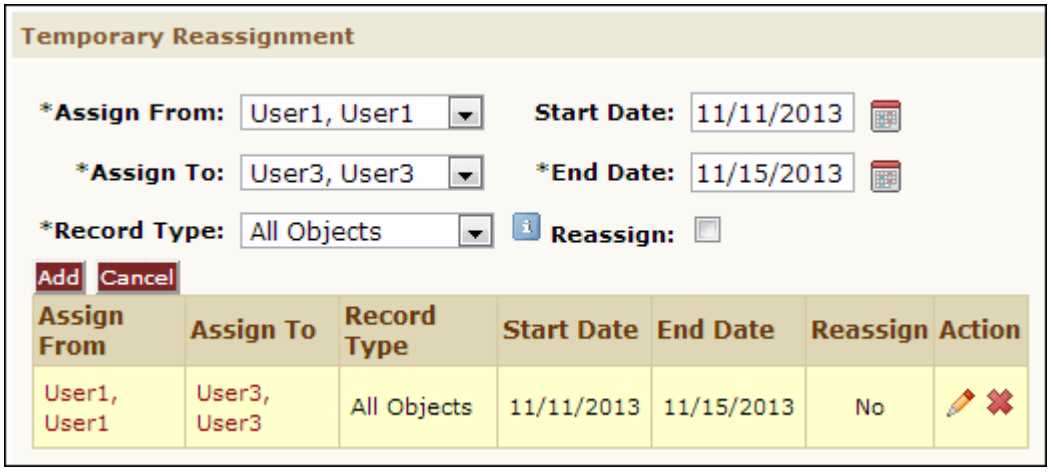
1.9.6.5 Reassigning All Requests for a User

Use the **Reassignment** page to reassign approval requests from one user to another. When a user is unable to approve for a short period of time, you may want to reassign requests temporarily from the **Temporary Reassignment** section. If a user is no longer able approve at all, you can assign requests permanently from the **Permanent Reassignment** section.

Note: *If you try to reassign Request A from User 1 to User 2 when both users are required in the same stop, the reassignment does not happen until User 2 has approved the request. When User 2 approves Request A, TeamConnect reassigns the same request from User 1 to User 2, and User 2 must approve again.*

Note: *Avoid including reassignment entries that create a circular logic and assign the same request back to the original assignee. For example, if you have a reassignment entry that reassigns Request A from User 1 to User 2 and another entry that reassigns Request A from User 2 to User 3, an entry that reassigns Request A from User 3 to User 1 creates a circular logic that does not end until you delete one of the entries.*

To reassign approval requests temporarily



Example: Reassigning Temporarily

1. Click the **My Workflow Processes** page using the hyperlinks in the **My Workflow Processes** portal pane or by selecting **Workflow Processes** from the **All** drop-down list on the tab bar.
2. Click the **Reassignment** link in the left pane.
3. From the **Temporary Reassignment** section, enter information for a reassignment entry. Refer to the Temporary Reassignment table for more information about these fields.
4. Click **Add** to save the request.

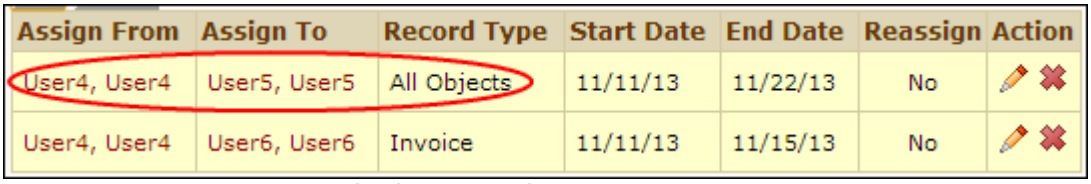
To reassign approval requests permanently

Example: Reassigning Permanently

1. Click the **My Workflow Processes** page using the hyperlinks in the **My Workflow Processes** portal pane or by selecting **Workflow Processes** from the **All** drop-down list on the tab bar.
2. Click the **Reassignment** link in the left pane.
3. From the **Permanent Reassignment** section, enter information for a reassignment entry. Refer to the Permanent Reassignment table for more information about these fields.
4. Click **Add** to save the request.

Conflicting Reassignments

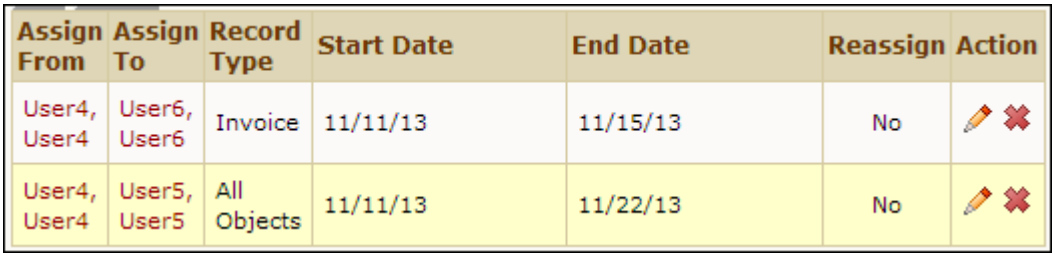
If two reassignment entries conflict, TeamConnect applies the first entry added, which is the first entry in the table. For example, the two entries in the following image conflict.



Assign From	Assign To	Record Type	Start Date	End Date	Reassign	Action
User4, User4	User5, User5	All Objects	11/11/13	11/22/13	No	
User4, User4	User6, User6	Invoice	11/11/13	11/15/13	No	

Reassignment Conflicts: TeamConnect Applies the Top Entry First

According to the previous image, TeamConnect reassigns all requests to User 5. If you want TeamConnect to reassign invoices until 11/15/2013 to User 6, delete the first entry and enter it again to change the order, as shown in the following image.



Assign From	Assign To	Record Type	Start Date	End Date	Reassign	Action
User4, User4	User6, User6	Invoice	11/11/13	11/15/13	No	
User4, User4	User5, User5	All Objects	11/11/13	11/22/13	No	

Reassignment Conflicts: Example in Reverse

According the previous image, Teamconnect reassigns in the following way:

- Invoices reassign to User 6 until 11/15/2013.
- Invoices reassign to User 5 from 11/16/2013 to 11/22/2013.
- All other objects reassign to User 5 until 11/22/2013.

Note: *If the entries that conflict are in the two different reassignment tables, you cannot tell which entry you added first from the* ***Reassignment*** *page. Check the* ***Workflow*** *page of a record to determine the first reassignment entry.*

Temporary Reassignment Section of the Reassignment Page

Field	Description

Assign From	The name of the user whose approval requests are being assigned.
Assign To	The name of the user who is being assigned to the approval requests.
Record Type	The type of records that you want to reassign. Only record types with active approval requests appear.
Start Date	The date when you want the requests to start reassigning. If you want all requests to reassign immediately, you do not need to select a date.
End Date	The date that you want TeamConnect to stop reassigning requests.
Reassign	The field that specifies whether reassigned requests return to the original assignee after the **End Date**. Place a checkmark in the check-box to specify that the requests return.
Add	The button you click to add the reassignment entry.
Cancel	The button you click to clear the reassignment fields or cancel your changes to a reassignment entry.
Action	The column that includes the following actions: • Click the button to edit the reassignment entry. The fields above the table populate with the reassignment information. Click **Add** to save your changes. All workflow requests update with changes you make. Click **Cancel** to cancel any updates you have made. • Click the button to delete the reassignment entry. If the **Start Date** of the rule has already passed, the reassigned requests return to the original assignee.

Permanent Reassignment Section of the Reassignment Page

Field	Description
Assign From	The name of the user whose approval requests are being assigned.
Assign To	The name of the user who is being assigned to the approval requests.

Record Type	The type of records that you want to reassign. Only record types with active approval requests appear.
Start Date	The date when you want the requests to start reassigning. If you want all requests to reassign immediately, you do not need to select a date.
Add	The button you click to add the reassignment entry.
Cancel	The button you click to clear the reassignment fields or cancel your changes to a reassignment entry.
Action	The column that includes the following actions: • Click the button to edit the reassignment entry. The fields above the table populate with the reassignment information. Click **Add** to save your changes. Click **Cancel** to cancel any updates you have made. Click **Add** to save your changes. All workflow requests update with changes you make. Click **Cancel** to cancel any updates you have made. • Click the button to delete the reassignment entry. If the **Start Date** of the rule has already passed, the reassigned requests return to the original assignee.

1.9.6.6 Returning Requests with Failed Actions to Workflow

Use the **Failed Actions** page to review errors that occur when the action that triggers a workflow process fails. For example, a prerequisite that prevents an invoice from posting could cause the request to fail and appear on this page after an invoice is approved.

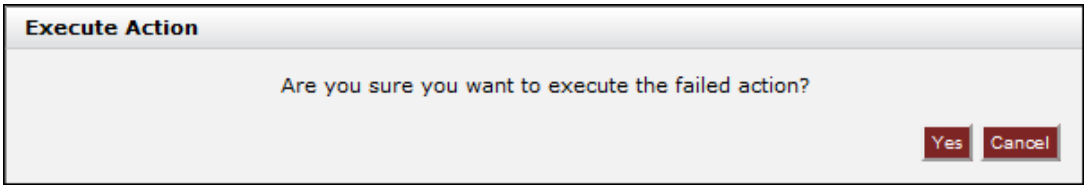
Failed Actions Page

You have two options when an action fails:

- Execute the failed action again without sending the request to more approvers.
- Restart the workflow process from the beginning with the first approver.

To re-execute the failed action

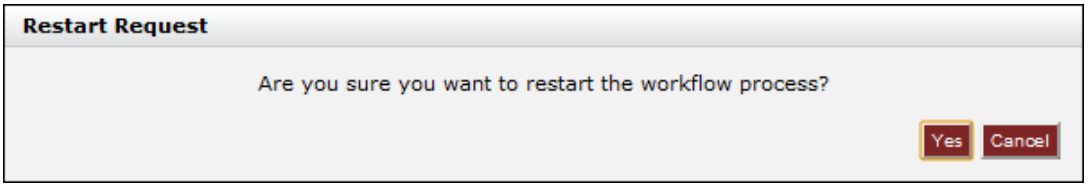
1. Resolve the issue that caused the error.
2. You can re-execute the failed action in one of the following ways:
   - Click the **Execute** button in the **Action** column of a request.
   - Select the check-box(es) for the approval request(s) that you want to restart and click the **Execute Action** button.
3. From the **Execute Action** popup, click **Yes**.



Execute Action Popup

To restart the workflow process

1. Resolve the issue that caused the error.
2. You can restart the workflow process in one of the following ways:
   - Click the **Restart** button in the **Action** column of a request.
   - Select the check-box(es) for the approval request(s) that you want to restart and click the **Restart Workflow** button.
3. From the **Restart Request** popup, click **Yes**.



Restart Request Popup

Failed Actions Fields

Field	Description
Record	The name of the record that is part of the request.
Type	The type of the record that is part of the request.
Request	The action that triggers a workflow process. For example, when TeamConnect creates the request after a user posts an invoice, **Post** appears in this field.

Error Message	A description of the error that causes the request action to fail. For example, the message might be for an error that occurs when TeamConnect tries to post an invoice, as shown in the Failed Actions Page image.
Action	You can click one of the following buttons to complete an action on this page: • **Execute**—Click this button to execute the failed action again without sending the request to anymore approvers. • **Restart**—Click this button to restart the workflow process from the beginning with the first approver.
Execute Action	The button you click to execute the failed action(s) again for all selected requests.
Restart Workflow	The button you click to restart the workflow process(es) for all selected requests.

1.9.6.7 Returning Requests With Errors to Workflow

As a Process Manager, you may need to restart a workflow process in the following situations:

- The process expires at its current stop in the approval route.
- The request has been rejected and you believe that the approval process needs to be restarted.
- The process is in progress and you believe that it should restart for some other reason.
- The process encounters an error that one or more users in the approval route are not available.

In most of these circumstances, you can restart the process or from a point in the process without taking additional action.

However, if the process has encountered an error, the system may require some troubleshooting before the process can be restarted. For example, a system administrator may need to modify the approval route, user group, or user account in the system. The process cannot be restarted and removed from your **Attention Required** page until such issues are resolved at the administrative level.

To restart a process

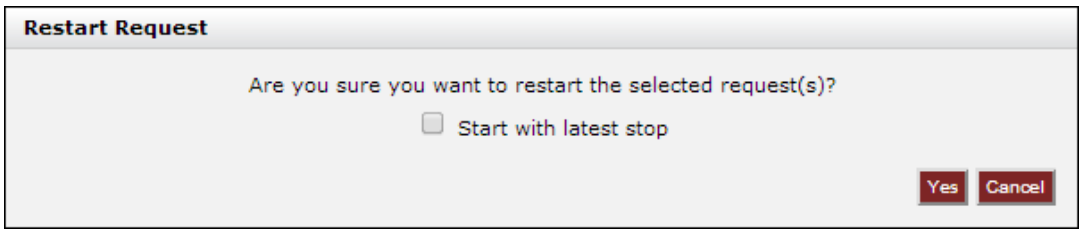
1. Go to the **My Workflow Processes** page using the hyperlinks in the **My Workflow Processes** portal pane or by selecting **Workflow Processes** from the **All** drop-down list on the tab bar.
2. Locate the process that you need to restart on the **Attention Required** page or the **In Progress** page.

Important: *If you are restarting a process with an* ***Error*** *status on the* ***Attention Required*** *page, you may not be able to restart the process without assistance from an administrator.*

3. Select the process(es) that you want to restart.
4. Click **Restart**.

   A popup displays to confirm that you want to restart the request(s).

   If you are restarting a process on the **Attention Required** page, the **Start with latest stop** check-box also appears. Select this check-box to send the request to the approver(s) part of the workflow process when the error, expiration, or rejection occurred.



Restart Request Popup from the Attention Required Page

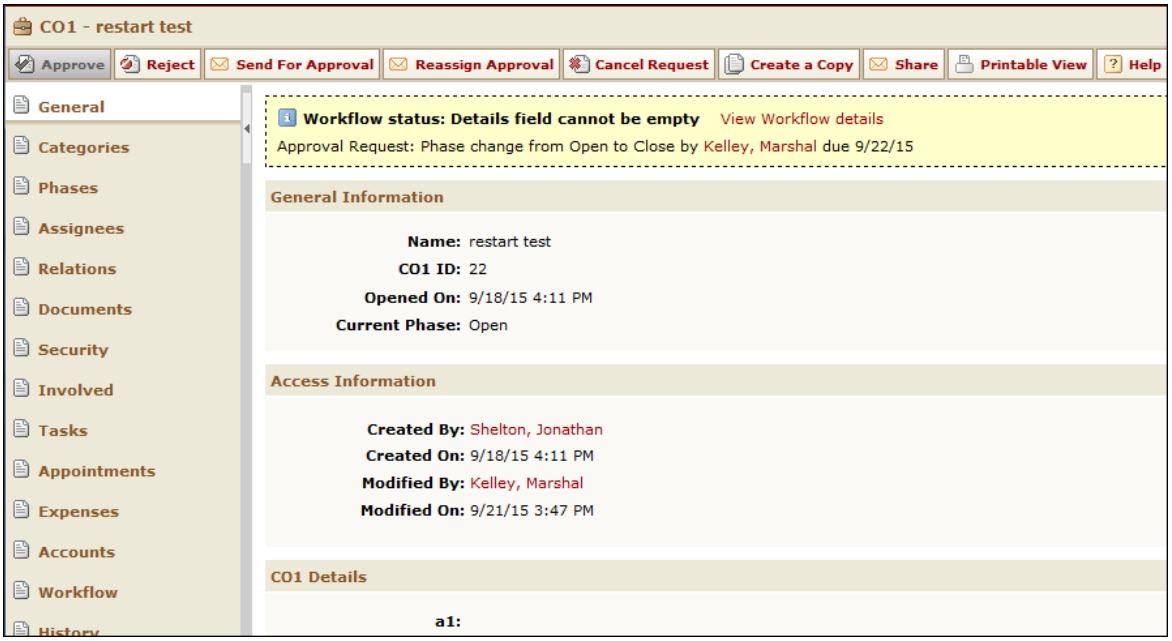
5. Click **Yes**.

   The approvers in the first stop of the approval route receive notification of the request. The **Approval Status** on the **Workflow** page of the record updates.

1.9.7 Using Hold Conditions

Hold condition functionality is available for users with TeamConnect 4.0.8+.

Hold conditions provide admins with a measure to ensure that approvals do not go past a given stop if conditions are not met. Used in tandem with universal edit rights for approvers at a stop, hold conditions can also allow an admin to automatically inform users how to resolve the hold and allow workflow users to resolve it themselves. The **Approve** button will be grayed-out until the condition is resolved.



Hold Condition Stopping Workflow

For more details, see Defining Actions for Approval Rules.

Hold Conditions in Practice

Setup

1. Navigate to the desired object from TeamConnect by clicking **Setup** followed by clicking **Object Definitions** from the Go to... dropdown menu.

2. Click the object. Click the **Rules** tab once it opens.

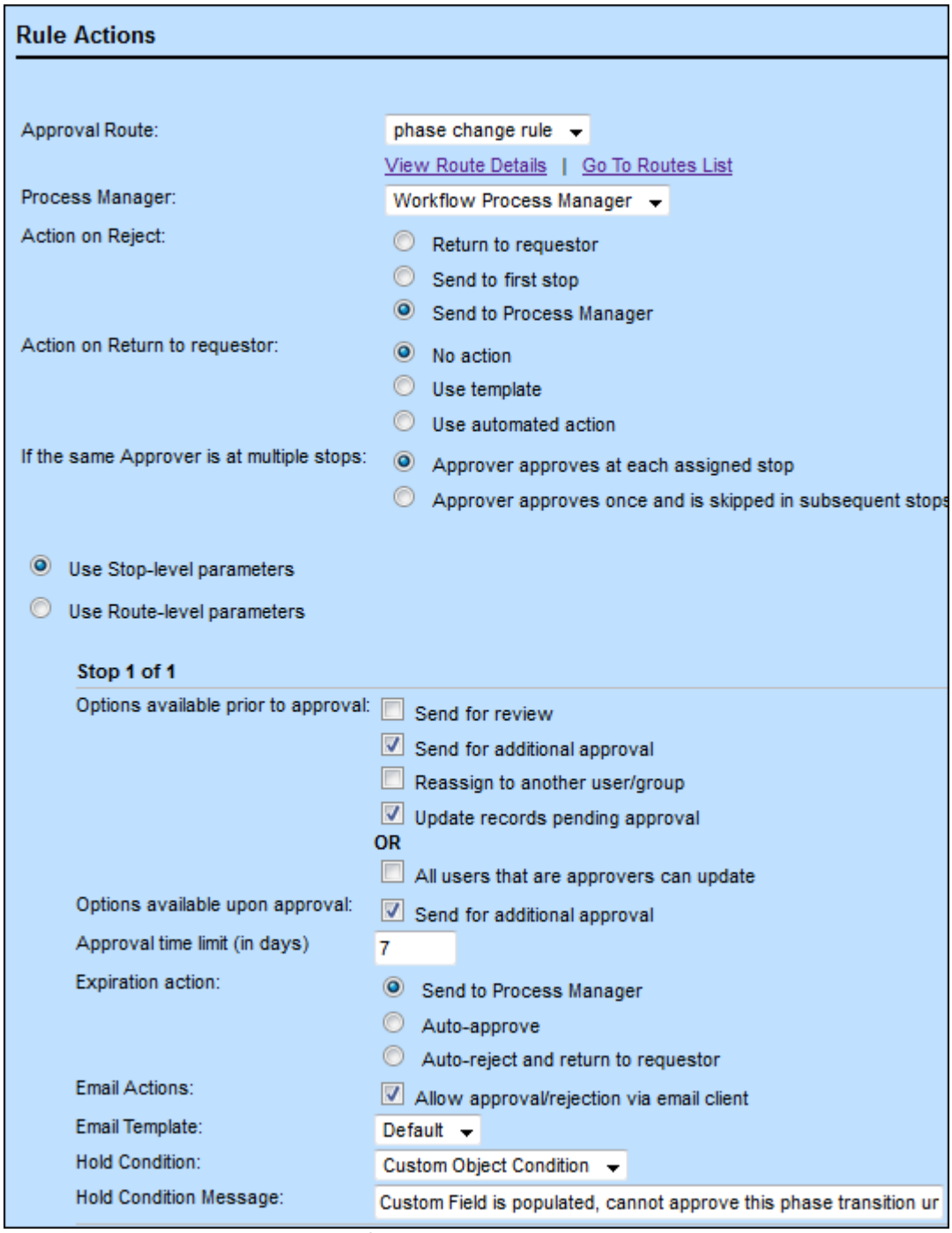
3. Select the preset rule or create a new one. *More details on rules can be found here.*

4. Click the **Action** tab.

5. For **Stop-level parameters**, users will be able to select a preset condition via the Hold Condition dropdown. ***Note:*** *Only conditions on the selected object will be available.*

6. Write a clear, concise message to direct users what the hold condition is, giving them enough information to resolve the issue themselves. ***Note:*** *There is a 2000 character limit.*

7. Save and close.



Hold Conditions and Rule Actions

1.10 Accessibility

TeamConnect is accessible to users with disabilities and complies with Section 508 of the Federal Rehabilitation Act, including accessibility mode and keyboard access.

1.10.1 Enabling Accessibility Mode

Use the **General** page of user preferences to provide additional accessibility options for those with vision impairment or difficulty using the mouse.

The Go Button

In some drop-down boxes in TeamConnect, selecting an option automatically performs a page refresh, which makes it impossible for keyboard users to select an option. When you enable accessibility mode, a **Go** button appears next to certain drop-down lists. This allows you to press the Up and Down keys to navigate the drop-down list, then press the **Go** button to refresh the page.

To enable keyboard accessibility mode

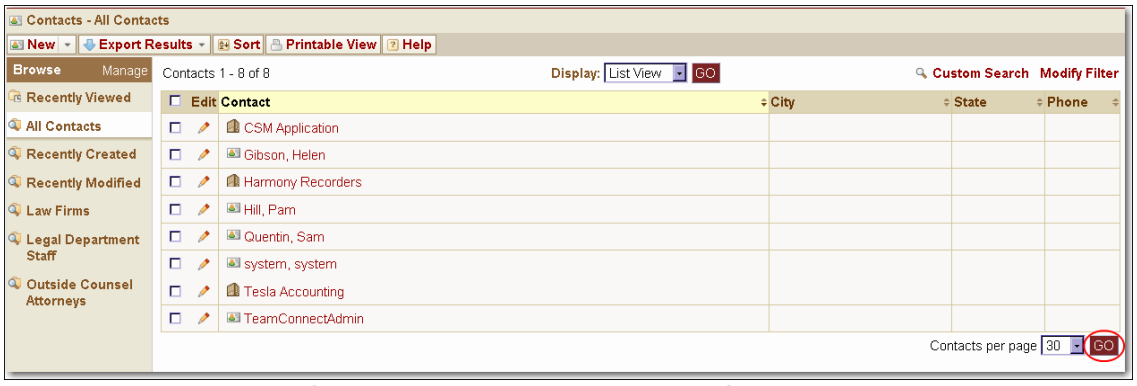
1. On the global toolbar, click **Preferences**.

   The Preferences **General** page opens.

2. In the **Accessibility** section, click the **Enable accessibility mode** check-box.

General Page, Accessibility Setting

A **Go** button appears next to all drop-down lists where you make selections that change the way information appears on a screen. You can tab to the drop-down list, use the arrow keys to select the appropriate option, and then press the Tab key followed by the Enter key on your keyboard to start the action.



Contacts List View with Accessibility Go Button

1.10.2 Using Assistive Technology

Various types of assistive software, such as JAWS® for Windows, are available to make web-based applications like TeamConnect more accessible to users with disabilities. These products achieve accessibility in various ways, such as audibly reading text that appears on the screen.

Depending on your assistive software program, there may be some settings that you must make to work properly in TeamConnect. For example, in JAWS, you must select the **Use Virtual Labels in Forms Mode** option on the **HTML Options** screen.

Make sure that you set all of the appropriate options in your assistive software application. For details on setting HTML options, refer to your assistive software program documentation.

Currently, TeamConnect supports JAWS® 11 or later.

1.10.2.1 Using JAWS® with TeamConnect

When using JAWS® with TeamConnect, you should be aware of the following:

Pages/Screens

- You can TAB to all clickable elements on a page.
- You can trigger actions or open a link using the Spacebar or Enter keys on your computer.
- All required fields are marked with an asterisk (*).
- Most pages are readable without style sheets and it should be easy to distinguish page headings and the information hierarchy. Note that some hidden dialog boxes and menus may appear on a page.
- You can navigate TeamConnect's basic functionality without style sheets.
- WAI-ARIA Landmarks are defined so that users can skip repetitive navigation links.
- When a form element is in focus, JAWS® will read the form label.

Browsers

Depending on your browser version, JAWS® may announce certain page elements and labels more than once.

Limitations

Users with or without disabilities can access TeamConnect with widely varying sets of capabilities, software, and hardware. While every effort has been made to comply with Section 508 Standards, TeamConnect might not satisfy every accessibility requirement.

TeamConnect is not certified for the following:

- Braille access
- Synthesized speech
- Voice input

Please be aware of the following:

- The TeamConnect auto-suggest feature may not work with JAWS®.
- Depending on your browser version, JAWS® may announce certain page elements and labels more than once.

1.10.3 Using Keyboard Shortcuts

Keyboard shortcuts provide an alternative to a mouse for navigating on a page.

In most fields in TeamConnect, you can still use the common shortcut keys that you normally use in other applications. TeamConnect also provides its own access keys.

Note: *The plus (+) signs indicate that the three keys should be pressed at the same time. You do not have to press the plus sign (+) key on your keyboard.*

Be aware of the following limitations:

- On the Home Page, you cannot move portal panes around using the keyboard.
- The **Recent Items** drop-down menu is not keyboard accessible.
- The Screen Designer Tool uses drag and drop functionality and is not keyboard accessible.
- Record snapshots are not currently accessible.

1.10.3.1 Commonly Used Access Keys

The table below describes some commonly used access keys on the keyboard and in a browser:

Keyboard Shortcuts

Shortcut keys	Functionality
CTRL+A	Selects everything on the screen or in the field. ***Tip:*** *To select all in a field, first place the focus on the field that contains the desired information.*
CTRL+C	Copies the selected data.
CTRL+F	Opens the **Find** dialog box where you can enter the text you want to find. This is useful when you are not familiar with the layout of a screen or tab. **Points to Remember:** • When you are looking for the value of a field, make sure that the screen is in Read-only mode. The command is unable to find values in most fields when the screen is in Edit mode.

	• When you are looking for the label of a field, the screen can be in either Read-only or Edit mode. • The system searches only the currently displayed tab or screen. To find a value in a record, you must open each page or screen separately and search within it.
CTRL+V	Pastes the selected data.
CTRL+X	Cuts the selected data.
TAB	Moves between fields on the screen, typically from left to right, according to the pre-determined tab order.
SHIFT+TAB	Moves backward to the field or button that, according to the Tab order, comes before the currently selected field or button.
Up and Down arrows	Selects the desired option in drop-down boxes, multiple-select fields, and radio buttons.
Enter key	Submits the form or triggers the desired action.
Spacebar	Select/Deselect check-boxes.

Using Firefox

If you are using Firefox, the following applies:

- When TeamConnect provides a **Browse** button to locate a file, users are unable to use the Tab key to place the focus in the blank browser results box. This is because this box is populated with a filename that you select while browsing; users are unable to type in the box.
- Use the ALT + Shift + <key> sequence to move around.

Web Browser Shortcut Keys

Shortcut keys	Functionality
Back	Move back to a previous page. Typically appears as a back arrow in your browser's toolbar.
Forward	Move forward to a previous page. Typically appears as a forward arrow in your browser's toolbar.
Refresh	Update the contents of the current page. Typically listed under the **View** menu as **Refresh** or **Reload**.

Stop	Stops the page from loading content or halts an action. Typically appears as an **X** in your browser's toolbar.

Note: *If you are using Internet Explorer, there are specific instructions to access functions associated with buttons on the toolbar, such as the* ***New*** *or* ***Save*** *buttons. See Using Internet Explorer for more information.*

1.10.3.2 Using Keyboard Features

TeamConnect provides additional features to provide full keyboard accessibility and better interaction with assistive technology. Specifically, these features let you use the keyboard to make selections from drop-down lists and list boxes.

You do not need to enable accessibility to use these features.

Using the Safari Browser

If you are using the Safari browser, to use the TAB key to set focus, it is recommended that you change your preferences as follows: Open your Safari browser, select Preferences, and then select **Press tab to highlight each item**. Restart the Safari browser for the changes to take effect.

Making Selections in Drop-down Lists

In all drop-down lists, you can use the UP and DOWN ARROW keys to scroll through the items.

To make a selection in a drop-down list

1. Press the TAB key until the focus is on the appropriate drop-down list, for example, the **per page** area in the bottom right corner of a list view.
2. Press the UP and DOWN ARROW keys to select the desired item in the list.
3. When the selected item is in the box, select one of the following actions:
   - If there is no action attached to the selection, click the TAB key to continue to the next field.
   - If an action is attached to the selection, press the TAB key to advance to the **Go** button, and then click ENTER to start the desired action.

Making Multiple Selections in List Boxes

You can make multiple consecutive or non-consecutive selections in list fields without using a mouse.

To select consecutive items from a list box

1. Press the TAB key until the focus is on the appropriate list box.

2. Use the UP or DOWN ARROW key to move within the list to the first item.
3. Press and hold SHIFT.
4. Use the UP or DOWN ARROW key to move to the last item you want from the list.
5. Release SHIFT.

   All of the consecutive items, including the first and last items, are selected.

To select non-consecutive items from a list box (IE browsers only)

1. Press the TAB key until the focus is on the appropriate list box.
2. Press SHIFT+F8 to activate the multiple select capability.
3. Use the UP or DOWN ARROW key to move within the list to the desired item.
4. Press SPACEBAR to select the item.
5. Repeat these two previous steps to select additional items.

   All of the desired items are selected.

1.10.3.3 TeamConnect-Specific Access Keys

Shortcut combination keys allow you to access certain commands in TeamConnect. The action is usually executed when you press a key on the keyboard, such as the ENTER key.

The key combinations may vary based on the browser and operating system that you use. Typically, shortcut keys combine the ALT key or CTRL key with other keys. The use of access keys depends on the browser. For example, in Internet Explorer, access keys are used with the ALT key to give focus to the control, and the ENTER key usually activates the control.

Tip: *Shortcut keys appear in small tool-tips when you place your mouse cursor over the control. For users of assistive technology, your software will announce this information.*

The tables below describe the commonly used TeamConnect shortcut key combinations based on the way that you are viewing the screen. If necessary, substitute the ALT key with the appropriate key for your browser and operating system.

Record List Screen

Shortcut keys	Functionality
ALT+N	Create a new record.
ALT+P	Printable View.

Record Edit Screen

Shortcut keys	Functionality

ALT+C	Save and close.
ALT+E	Edit.
ALT+H	Open the online help.
ALT+M	Hides and collapses the left pane.
ALT+N	Creates a new record on the list screen.
ALT+O	Create a group appointment or create a company contact. ***Note:*** *This shortcut key is context-sensitive and works based on the type of record that you have open, for example, Appointments or Contacts.*
ALT+P	Printable View.
ALT+S	Save.
ALT+V	Save and view.
ALT+W	Cancel and view.
ALT+X	Cancel and close.
ALT+Y	Create a copy.
ALT+Z	Cancel.

Record View Screen

Shortcut keys	Functionality
ALT+Z	Delete.

Using Internet Explorer

If you are using Internet Explorer, use the following information to access the drop-down multiple-function lists in the tool bar, such as the drop-down lists associated with the **New** or **Save** buttons.

To access drop-down lists on the tool bar

1. Press the shortcut keys that take you to the desired function key. For example, press Alt + S to go to the **Save** button.
2. Press the TAB key to activate the associated drop-down arrow, and then click the ENTER key to open the drop-down menu.
3. Press the shortcut keys that move you down the list to the desired menu item, such as Alt + C to select **Save and Close**.
4. Press the ENTER key to complete the action.

Additionally, you can use the Internet Explorer browser options to change the size of the text in TeamConnect.

1.11 TeamConnect Mobile

TeamConnect Mobile is a mobile application that you can use to approve invoices on your phone. You can find the application in your mobile application store.

Note: *To use TeamConnect Mobile, you must have the rights to approve invoices.*

The following types of phones support the mobile application:

- iPhone
- Android
- BlackBerry/BlackBerry Keypad

After you have installed the application on your phone, set up the application to work with your instance of TeamConnect.

When you launch the application, the login screen appears.

To login to the TeamConnect mobile application

1. If you are not logging in to the application for the first time, enter the URL to the TeamConnect instance.

   Note: *Make sure to begin the URL with http:// or https://.*

2. Enter your username and password.

Single sign-on does not work with TeamConnect Mobile. If you do not have TeamConnect credentials, contact your TeamConnect administrator.

3. Select **Login**.

1.11.1 Invoices Pending for Approval

When you press the **Approvals** button from the **Home** screen, the **Pending For Approval** screen appears.

From the **Pending For Approval** screen, you can approve, reject, and view general information about invoices. From this screen, you can view up to 100 invoices at one time.

Note: *From this screen on a BlackBerry Keypad, you can view up to 25 invoices at one time.*

Pending for Approval Screen

To approve invoices

1. From the **Pending For Approval** screen, select **Approve** under the invoice you want to approve.

2. (Optional) Enter a comment for other TeamConnect users in the **Internal Comment** field.
3. Select **Approve**.

To reject invoices

1. From the **Pending For Approval** screen, select **Reject** for the invoice you want to reject.
2. (Optional) Enter comments about why you are rejecting the invoice in the **Comment to Requestor** field.
3. (Optional) Enter a comment for other TeamConnect users in the **Internal Comment** field.
4. Select **Reject**.

To sort invoices from the Pending For Approval screen

1. From the **Pending For Approval** screen, select the **Sort By**

drop-down field.
2. Select a field for sorting.
3. Select **Done**.
4. Select the icon to reverse the sorted order.

1.11.2 Viewing and Adjusting Invoice Details

From the **Pending For Approval** screen, select the icon for details of the invoice.

From the **Invoice Details** screen, you see the following tabs:

Invoice Details screen

Tab Name	Description
General	General information about the invoice. Refer to Invoice Header Information Section for invoice field descriptions. From this tab, select the link for the vendor to view vendor contact information. Refer to Contacting a Vendor or Approver for more information.
Summary	Invoice summary information separated by fees and expenses. Refer to Adjusting by Total Amount for descriptions of each field.
Line Items	Details for each line items of the invoice. Refer to (Detail Adjustment) Line Items Field Descriptions for descriptions of each field.

	From this tab, select the link in the line item area to view approver contact information. Refer to Contacting a Vendor or Approver for more information.
History	History of approvals for the invoice.

Invoice Details Screen

To adjust summary amounts

1. From the **Summary** tab, select a link for one of the amounts.
2. Select the **Adjust**

drop-down to determine how you want to adjust the amount.
3. Enter the new amount, reduced by amount, or reduced by percentage in the text box.
4. (Optional) Enter comments about the reason for the adjustment in the **Adjustment Comments** field.
5. (Optional) Enter comments for other TeamConnect users in the **Internal Comments** field.
6. Select **Save**.

To adjust line items

1. From the **Line Items** tab, find the line item you want to adjust.

   You can specify which line items appear in the list in both of the following ways:

   - Select the

drop-down at the top and select an option.
   - Change the **Warnings Only**

field to **ON** to specify that only the line items with warnings appear.

2. Select the icon for the line item you want to adjust.
3. To adjust the **Rate**, **Units**, or **Amount** fields, select the link for the field.
4. Select the Adjust

drop-down to determine how you want to adjust the amount.
5. Enter the new amount, reduced by amount, or reduced by percentage in the text box.
6. (Optional) Enter comments about the reason for the adjustment in the **Adjustment Comments** field.
7. (Optional) Enter comments for other TeamConnect users in the **Internal Comments** field.
8. Select **Save**.

1.11.3 Contacting a Vendor or Approver

When you click the link for a vendor or approver, the **Contact Details** screen appears. From this screen, you can do the following:

- Call a contact—Select the phone number in the **Phone** field.
- Email a contact—Select the email address in the **Email** field.
- View a contact's website—Select the website in the **Web** field.

1.12 Troubleshooting and Frequently Asked Questions

This section provides additional frequently asked questions and troubleshooting information about the TeamConnect end user interface.

1.12.1 Frequently Asked Questions

This section includes additional information about application features, such as tips or helpful facts.

1.12.1.1 Managing Records

Q: How do I close a record?

From an open record, click the **Cancel** button. If the record is in edit-mode, the record will be closed without saving any changes. If the record is in read-only mode, you can click a Back to records link instead (for example, from an expense record, you could click the Back to Expenses link at the upper right area of the record to close the record and return to the Expense list page).

Q: I copied a record but, in the new record, some of the old record's values were replaced by blanks.

If any record's field displays SECURED as the value then, if you create a copy of that record, the new record will not contain a value for that field.

Q: I'm trying to delete a record. I have it open on the Edit page, but I don't see a Delete button.

The delete button appears when you open a record - not in **Edit** mode. To delete a record, click its link in a list view. The delete button appears in the toolbar.

Q: I edited a record, then saved it, but it still appears in my Unsaved Items list.

There are four options associated with the **Save** button: **Save and Close**, **Save and Preview**, **Save and New**, and **Save**. The first three options will remove the record from the Unsaved Items list, but the basic "Save" option will save the record yet still leave it open for further editing. Thus the record is still considered an Unsaved Item in this case.

Q: I'm entering a negative amount in a numeric field, and I'm getting an error.

In read-only mode, negative numbers are displayed in parentheses. In edit mode, negative numbers are preceded by a minus sign. You should use the minus sign, not the parentheses, when editing a negative number.

Q: I'm clicking on the Contact search icon, and I'm getting an error.

If the error is related to some other field on your edit page, you will need to fix the error first. The Contact search tries to jump to a new page, but you are not allowed to navigate away from an edit page that has an error, except by clicking the Cancel button to cancel your edits.

Q: The required fields on my web browser page look different than the optional fields.

It's possible that you see a different appearance for some fields on a page because you have a browser add-in (for example, Google Toolbar) that changes screen appearance. TeamConnect

itself does not use different visual styles for required fields.

Q: I'm clicking on a column header, but my list isn't re-sorting.

In most parts of the TeamConnect user interface, when you see a tabular list of results, you can sort that list by clicking on any column header. However, in a few places the tabular list is pre-sorted and cannot be altered by clicking on column headers. Such places include the workflow displays (Active Requests, Completed Requests, etc.) for various record types.

Q: How do I save a record?

Once you finish creating or editing a record, you can click the **Save** button to save the record. You must be in edit mode to access the Save button.

Save—Saves the record and you remain in your current mode.

Save and Close—Saves the record and returns you to the list view.

Save and View—Saves the records and returns you to view mode.

Save and New—Saves the current record and opens a new blank record of the same type.

Q: I entered Custom Search, then requested a search view that had auto-search turned on. However, nothing happened until I manually clicked the Search button.

The auto-search feature only applies to search views that are designated as collections. When you click on links in the left pane that represent collections, auto-search is used, but it is never used in the Custom Search page.

Q: I only worked on two records today, but the Recently Viewed collection is showing me many more.

Recently Viewed presents up to 25 records, in reverse chronological sequence, covering the most recent 90 days, so records from previous days may also appear.

Q: There are no records in my Recently Viewed list, and I don't see the "Try another search" link.

"Try another search" only appears when Custom Search finds no records. If you are working with a record for the very first time, the Recently Viewed collection is empty until you actually view or edit one or more records.

1.12.1.2 Contacts/Address Books

Q: When I click the plus sign (+) in the Address Information block to add an additional address, the original address is automatically assigned the Primary status. When I click the plus sign to add an additional phone or fax number or Email or web address, the original information is not automatically selected as the default.

If you add an additional phone or fax number, Email or web address, you must manually select the primary information.

Q: I added a contact to an address book and decided to cancel the operation. The contact is still added to the address book.

Once you add a contact to an address book, you can remove it manually by opening the address book and deleting the contact.

Q: I subscribed to several address books and only some of them now appear in the collections pane. Where are the rest of them?

When you subscribe to address books, you can only select and subscribe to the address books that appear in the list that you are currently viewing.

For example, if you have four pages of address books from which to choose, and you want to subscribe to address books on pages one and three, select the address books that you want on the first page, and then click **Subscribe**. Next, go to page three and repeat the process.

Tip: *To see a larger number of address books per page, select a larger number in the* ***Subscribed Address Books per page*** *drop-down list.*

Q: I created a Private address book and I want to change it to a Public address book, but I get an error when I try to do this.

Once you create an address book, you cannot change its designation. You can delete the address book, and then create it again and give it the appropriate **Public** or **Private** designation.

1.12.1.3 Reports

Q: I refreshed my browser and now the data in my dashboards is distorted.

Please contact your TeamConnect Certified Professional.

Q: The reports in my dashboard appear truncated.

Change your screen resolution. If the problem persists, contact your TeamConnect Certified Professional.

Q: I ran a report on Documents that filters on the document size, but got "no data to display".

Be sure that you are supplying the correct range of sizes. Document sizes are in bytes, not kilobytes or megabytes.

Q: After I add a report to a portal pane, the report does not show up.

You must be using Flash 10.1 and above to display reports in portal panes.

Q: I'm editing a report specification and I can't drill down to some fields in the Fields list hierarchy.

The hierarchy in the Fields list is very extensive, but there are some limitations. Sometimes a field in the list represents an entire entity of its own. For example, the **Vendor** field in an Invoice record represents an entire Contact record of its own. You can usually drill down into entities to see all their fields, but here are some exceptions:

- If the field that you're looking at is a Project field of record type **Any**, or if you're looking at the Project field in the Task record type, the Project field can be expanded to show the system fields associated with the Project, but none of the Project's custom fields are available. Also, the **Categories**, **Current Phase**, **Default Category**, and **Assignee Role** fields of the project are not available for use as search criteria. They are available as result fields.
- A Project field can be navigated to see the Project record's own fields, but the related objects for that Project record aren't available.
- When you drill down into a field of type User (for example, the **Created By** or **Modified By** fields found in most record types) you see information from the Contact record associated with the user, not from the User record itself.

Q: I've made changes to a report and saved the changes, but I still see the old data.

When a report is run, the data is automatically stored in your computer's memory. If you navigate away from the report to do other work, when you return to the report, you will still see the old data - even if you changed and saved the report.

For report changes to take effect, one of the following must occur:

- The Data Warehouse is refreshed since the last time you ran the report.
- The report properties are edited and saved (by you, or another user) since the last time you ran the report.
- Your computer runs out of memory, so the oldest report data is deleted to make room for new, incoming report data.

Note: *This answer not apply to Tabular Only reports because Tabular report data is not saved in memory.*

1.12.1.4 Other Questions

Q: I clicked the browser Back button and, when I went Forward again, my work was gone.

Incomplete data entry is lost when you use the Back button. Finish and save your data entry before going back.

Q: After clicking my web browser Stop button, the links on my home page are not responding. Why?

After you click your browser **Stop** button, you need to click the browser **Refresh** button and wait until the page is completely refreshed (i.e. the browser activity icon stops moving). Afterward, TeamConnect links will become active.

1.12.2 Troubleshooting

Calendar

Issue: The appointments in the calendar display appear to be in the wrong time zone.

Resolution: In order for the calendar to display appointments in the appropriate time zone, the machine on which the browser is running must be set to the same time zone as the time zone set in User Preferences in TeamConnect. Contact your system administrator to set these preferences.

Task or Invoice Rates

Issue: On a task or invoice, the default rate that is defined on the contact Rate page is not appearing or is incorrect.

Resolution: If you defined more than one default rate on a contacts' Rate page, a start or end date may be incorrect or blank. For specific details, see Notes for Rates.

Browser Hangs

Issue: I clicked the browser's Stop button, and some of the buttons and links on the page don't work now.

Resolution: If you click the Stop button while a page is loading, you will leave the page in an inconsistent state. You cannot rely on items on the page working correctly unless you click Refresh to force the page to finish loading.

Document Reports

Issue: I am creating a report that uses Document records as data, but I am seeing duplicate document names in my report.

Resolution: If a Document has been checked in more than once - in other words, has multiple versions - each version acts like a separate Document record in the report results. If you'd like the report to return only the current versions of the documents, then apply appropriate filter criteria to the report.

1.13 Glossary

A | ***B*** | ***C*** | ***D*** | ***E*** | ***F*** | ***G*** | ***H*** | ***I*** | ***L*** | ***M*** | ***N*** | ***O*** | ***P*** | ***R*** | ***S*** | ***T*** | ***U*** | ***V*** | ***W***

A

Accounts

Records used for tracking various amounts of money allocated for specific purposes. There are two kinds of accounts: Budgets and Reserves.

Address Books

Groups of Contacts created by each user as desired. Each user can organize person and company contacts into logical groups. A user could create a group of contacts with whom he or she frequently interacts, so that their phone numbers are easily accessible when needed. Members of address books who are also Users can be added as attendees to appointments.

Application

A software program specialized for a particular purpose, for example word processing or email.

Appointments

Events, engagements, or meetings scheduled for a particular purpose at an assigned place and time with specific Resources. Appointments can be made only for Users who become the appointment's Attendees. Appointments can be easily associated with specific Projects if necessary.

Approval

Authorization from one or more users (known as approvers) which is required for certain actions that are attempted by users. For example, deleting a matter, posting an invoice, or changing the phase of a matter could require approval and therefore trigger an approval process. When you trigger an approval process, you are considered the requestor in the approval process. The attempted action is completed upon the final approval.

Approvals are the major component of TeamConnect Workflow.

Approvers

Designated Users who have the authority to approve or reject certain actions attempted by users of TeamConnect. There can be several approvers at each level of the Approval process. This approval level is also known as an approval Stop. During an approval process, approvers may be able to send

the approval request to reviewers for review before they make their decision. Approvers can view their approval requests on the **My Approvals** screen.

Assignees

TeamConnect Users who are assigned to Projects or Tasks. There can be one or several users assigned to a project. The main assignee is in charge of the whole project, whereas the rest of the assigned users are responsible for certain parts of the project. In tasks, there can be only one assignee at a time. All assignees can be re-assigned, if necessary.

Contacts who are Involved in the project are different than assignees. For example, you select outside counsel to work on a matter; you do not assign outside counsel to a matter because they are not users.

Attendee

TeamConnect Users who are listed as taking part in an event, such as a meeting or conference call, for which there is an Appointment scheduled. Only users, not external contacts, can be attendees.

B

Billable Tasks

Tasks that have a financial cost and therefore can be posted against (debited from) accounts, for example, buying a new computer is a task that has a specified cost and needs to be posted against an account. Alternatively, as task such as calling a meeting has no cost and is considered non-billable.

Billable tasks can be tracked by their rates on an hourly basis. All billable tasks can be posted against certain accounts according to the posting criteria you set for each individual account.

Budget

Budget is a type of Account that represents a certain amount of money set aside by the organization or its individual departments to do business for a specific period of time, such as the fiscal year.

C

Category

Items in the user interface that are associated with specific groups of fields displayed in a record.

By adding or deleting categories in a record, you can display or hide the associated sections or fields in that record. In some cases, you might need the user rights to view specific categories and the custom fields belonging to them.

Check In or Out

A way to manage files that are uploaded to the Documents screens so that only one person at a time can edit them. If a file is checked out, no other users can edit the file. When the user is done editing and checks the file in, it becomes available for check out.

Child Record

A record that has a parent record. Records can have hierarchical relationships between records. One (parent) record can have multiple (child) records, whereas each child record can have only one parent.

Child records might be required to have a parent. However, parent records are not required to have child records.

Categories can also have parent-child relations.

For more details, see "Parent and Child Accounts" on page 87 and "Parent and Child Projects" on page 110.

Contact

Individuals or organizations that conduct business with your organization and in one way or another are involved in the records with which you work. For example, staff, claimants, opposing parties, witnesses, agencies, vendors, outside counsels, and so on can all be described by contact records. You specify Categories to indicate the type of contact.

Contact-Centric Projects

Projects that are associated with and revolve around a specific contact without which they cannot exist. For example, an insurance claim record cannot be created without specifying an insured contact.

Within a contact-centric project, the contact record is displayed as a single hyperlink. It is created through a search module field and displayed in the general information section of the project.

Custom Objects

Objects created for your organization. Unlike System Objects, they do not come standard with TeamConnect. They are created by your TeamConnect developer. Custom objects can have names used within your organization for records or files, such as matters, and policies. Within this documentation, custom objects are referred to as Projects.

D

Default

A value or setting that TeamConnect automatically selects if you do not specify a substitute. For example, TeamConnect may select certain Categories as the default for your Records, or set a contact's address as the default.

The default directory in document screens is the directory the operating system searches unless you specify a different directory.

The default can also be an action that the program will take. For example, a user who creates an appointment is automatically (or by default) added as an attendee.

Details

Additional, custom fields that may be created for various records. These fields are created to meet the specific needs of your organization. They are usually organized into groups on the screen, known as Detail Forms or blocks.

Detail Forms

Certain groups of Details created for a specific object Category. They can be displayed on a separate tab or as a section on the **General** tab of an object record.

Document

A file uploaded to the Documents area of TeamConnect. These can be plain text, MS Word, MS Excel, PDF, image (JPEG, GIF, BMP), HTML, XML, and so on. They are usually associated with TeamConnect records, for example, a picture taken of a car damaged in an auto accident.

E

Edit mode

A state of a record in which you can modify it. In most screens, you can switch a record from Read-only mode to Edit mode by clicking the **Edit** button, if you have the appropriate Rights.

Email Account

An account for email messaging setup on an email server and accessed by the email client. A default email account is one that has already been set up for you.

Email Client

An email application for sending and receiving email messages, for example, Microsoft Outlook.

Embedded projects

Child projects that are embedded in their parent project and cannot be created or accessed outside it. They also have a more simplified screen layout and functionality than child records.

Within the parent record, its embedded records are displayed as multiple hyperlinks in a separate tab or section with a search or batch screen.

Entity

This term is sometimes used to refer to Objects in TeamConnect.

Expenses

Costs of doing business in your organization, such as the cost of merchandise bought and the cost of services received. For example, office supplies, transportation, phone calls, meals, and employee training, could be considered expenses. Expenses can be project-specific (associated with a particular Project), or global (not associated with projects).

Expenses can be posted against Accounts according to the posting criteria you set for each individual account.

F

Floating Tasks

Tasks that do not have a specific due date.

Forums

Areas in TeamConnect where discussions are held. Forums contain Topics, wherein messages are posted discussing the topic.

G

Global Search

Global Search allows you to search for specific record types or across **All Records** or **All Projects**. You can enter a few consecutive characters from any record's name or number, select the type of record, and the system will figure out what to search by, name or number, and whether the characters come from the beginning, middle, or end.

Global Tasks

Tasks that are not associated with a specific project.

Group

User groups contain users who have the same or similar responsibilities within the organization. Each user group has its own set of access rights assigned to it. Your TeamConnect system administrator can provide you with further information about the groups that exist in your organization.

H

History

Records that reflect chronology or history of the record to which they are related. History entries may contain facts about payments made by adverse carriers, automated assignments, and so on. Within different companies these entries are referred to as docketing or calendaring, logs, diaries, notes, journals, and so on.

Home Page

A screen which is displayed when you first log into TeamConnect, containing portal panes of useful links and information specific to your role in your organization. You may have access to more than one home page.

Hyperlink

An element in an electronic document or on the screen that links to another place in the same document (screen) or to a different location. You click the hyperlink to follow the link. You can create hyperlinks to certain documents in the Documents area.

I

IMAP

Short for Internet Message Access Protocol, an Internet-specific protocol that allows email clients to retrieve email messages from servers. This protocol cannot send email.

Invoices

Bills sent by Vendors who provided your organization with their goods or services. Within TeamConnect, there are two distinguished types of invoices: Invoice Expenses and Invoice Tasks. Invoices can be posted against certain Accounts according to the posting criteria set for each individual account.

Involved

Contacts involved in Projects, such as claimants, witnesses, policemen, plaintiffs, defendants, and so on. Unlike project Assignees, involved parties are not TeamConnect users. The information about the contact's involvement is displayed both in the contact record and the project record.

IP Address

TCP/IP (Transmission Control Protocol/Internet Protocol) are the two main communication protocols used to access Internet addresses. A computer must have an IP address before it can connect to the Internet. An IP "data packet" (like an email) must have a "send-to" IP address before it can be sent to another computer, just like postal mail needs an envelope with a real address. An IP address is several numbers separated by periods, for example, 192.68.20.50.

L

Line Items

Items in the list of goods or services specified in the vendor Invoice. The details of each line item, such as the type (task or expense), price, quantity, and dates must be entered on the **Line Items** tab of the corresponding invoice.

M

Main Record

A record that may have multiple related records that are not hierarchically subordinate to it, but were created for it and hence, are dependent on it.

For example, a Dispute record can have multiple tasks and appointments, an invoice can have multiple history records, a contact can have multiple documents, and so on. Typically, main records are projects. However, all record types can have dependent records of type history and document.

Within a main record, its dependent records are displayed as multiple hyperlinks in a search screen, or in a separate tab or section of the record.

Member

This term can refer to the following:

Group members are Users who are included in a group, from which they can obtain rights to various objects and tools in TeamConnect.

Route members are users who are included in the Approval process in an Approval Rule.

Address Book members are contacts that are included in a user's personal address book.

Memo Text

A type of text field in which you can type free form text of a length up to what your database permits.

Matters

Types of records that are specifically designed to meet the legal needs of an organization. The standard TeamConnect matter types are advice & counsel, disputes, and transactions. They are sometimes referred to as "projects," such as in the **Project** search module.

N

Network

A group of computers that all share the same applications. The applications may reside on a single main computer. The main computer is the server, and the computers (including applications) being served are the clients. Keep in mind that an application may also act as a client.

O

OK

A command used to complete a task.

Other

Describes a different alternative that does not fit under an appropriate category or grouping.

P

Parent-child relationships

Hierarchical relationships, where one "parent" record can have multiple "child" records, whereas each child record can have only one parent. For example, one dispute record can have multiple account records related to it. Within a parent record, child records are always displayed as hyperlinks on a search screen, on a separate tab or section of the record.

In the **Category** drop-down list on the **Categories** tab, the parent-child relationships between categories are indicated by indentations that reflect the hierarchical relationships between them.

For more details on the parent-child relations between projects, see "Parent and Child Projects" on page 110.

Parent Record

A record of a higher "rank" in the record hierarchy, which may have multiple related records of a lower "rank," often known as Child Records. In most cases, the parent record is a matter. The only other record type that my have parent-child relations is Account.

Within each child record, the parent record is always displayed as a single hyperlink in the **General Information** section on the **General** tab of the record. You can select the parent record by using the Search Module field (or a drop-down list, depending on your settings).

Phases

Specific stages each Project must go through to be completed. Together these phases constitute the project's life cycle.

Port

An input-output point where data can enter or leave a computer. If an application is set up on a computer, for example, Outlook, this computer is the host for this application. A computer port allows the application to communicate outside the computer.

Portal Pane

A component of a home page that could display items such as your current projects, tasks, and appointments, hyperlinks to the Web, or hyperlinks to create new records. Portal panes in your home page are tailored to your specific needs by your system administrator, to give you quick access to tasks you need to perform frequently.

Preferences

System options that you can use to meet your individual needs and personal preferences. They are listed in the **Options** drop-down list on the **Main** menu bar.

Process Manager

A TeamConnect user who is responsible for monitoring approval processes that are sent to approvers by requestors. Process Managers receive notifications of approval requests when there is an error. They may also be notified when a request is rejected or expired. They can restart an approval process to resolve errors, rejections, or expirations, or reassign the task of approving a request to other users when necessary. They can also reject approval requests.

The Process Manager role is assigned to a user group rather than an individual user. However, each user within that group has equal authority to perform Process Manager activities.

Projects

Types of records that are specifically designed to meet the business needs of your organization, also known as Custom Objects. All available types of projects for your organization are displayed at the end of the **Go to** and **Create a new** drop-down lists on the **Main** menu bar.

Project-specific Task

Tasks that are not associated with a specified project.

Protocol

A method or type of communication that a computer network uses.

R

Read-only Access

Record-level security state in which the record cannot be modified as a result of the rights assigned to it or for workflow reasons, for example, when the record is pending approval, and the approval rule prevents anyone from modifying the record. This relates to Record Security and not to the Read-only Mode display state.

Read-only Mode

A state of a record in which you cannot modify it. Records in Read-only mode can be switched to Edit mode if you have the appropriate Rights.

Record

A record is a collection of data about something or someone with reference to a particular matter, such as a lawsuit, meeting, or financial transaction, saved in the database. Records have a number and a name assigned to identify the record in the database and help you search for it.

Rejection

Denial of an Approval request to do a user-attempted operation by members of a Route. If the operation is rejected, this is noted on the **Workflow** tab of the Record.

Relation

An association between one record and another. They are typically displayed as hyperlinks on the screen, and can be established through Search Module fields, or the **Relations** tab.

Related Records

Associated records that can be accessed from within other records (often collectively referred to as `parent records') by clicking hyperlinks. Often they may be represented by a separate tab or section in the parent record, which has the structure of a Search Screen. For example, appointments, tasks, histories, expenses, documents, milestones, involved, and accounts are related records within Projects.

Request

An attempted operation by a user that is not completed until it has been approved by the approvers in a specified approval route. A request can be tracked by the requestor, the approvers who receive the request, and possibly a Process Manager, if one is specified for that approval process.

Requestor

A user who performs an action that triggers an approval process, such as posting an invoice, voiding an invoice, or changing the phase of a project (such as a matter). The request is sent to approvers according to the approval route that is defined for that workflow process. The requestor's request is approved or rejected by the approvers. Requestors can view the progress of their requests on the **My Requests** screen. They can also cancel a request if necessary.

Required Fields

Fields that must have a value entered or selected in them to save the record. TeamConnect typically indicates which fields are required whenever you attempt to save a record with no values in the required fields. The labels of required fields, by default, are displayed in red with an asterisk next to them. You can change the display settings for required fields through the **Appearance** options accessible from the **Options** drop-down list on the **Main** menu bar.

Reserve

A type of Account where the money is allocated from the Budget for the settlement of matters, such as paying outside counsel fees and other costs accrued while working on a matter, or an amount set aside for claim payments.

Resources

Means and facilities necessary for conducting an event, for which an appointment has been scheduled. For example, you may need to book a conference room or a projector.

Reviewer

A user who is asked by an approver to review an approval request. Reviewers are not approvers, so they do not approve or reject the request. They can provide feedback to the approver who makes a decision in the process. Reviewers can view their requests for review on the **My Approvals** screen.

Rights

Permissions to perform operations in TeamConnect, such as accessing, creating, updating (editing), and deleting whole records or parts of them. Rights are assigned to you by your TeamConnect system administrator based on your role within the organization.

Root

The top Category in the categories hierarchy tree. It is always automatically added to every record in TeamConnect. In Projects, this category has the same name as the object itself.

Route

A defined path of users whose Approval is required to authorize an operation in TeamConnect, such as posting an invoice. The path can consist of one or more Stops, that can each contain one or more members who can approve or reject the operation. Routes are used for Workflow purposes, to help define and control your business processes.

Rules

Your organization's business Workflow requirements defined by your TeamConnect system administrator. Rules allow the system to automatically check and validate operations that users attempt, prompt them if values are missing, route requests for Approvals if necessary, and so on.

S

Search Module Fields

A special utility that allows you to quickly search for a specific record and link it to the record with which you are currently working without leaving its screen. The Search Module is always represented by a field with two icons, **Find** and **Open**, next to it.

Search Screen

A type of screen that is displayed whenever you are looking for a specific record. In the user interface, search screens can be displayed as separate screens, tabs, or sections of a tab. They consist of either two tabs (**Filter** and **Results**) or on the same page as a Search Criteria section and Displayed Record section. You can access these screens if you select an option in the **Go to** drop-down list on the **Main** menu bar or if you click the **Find** icon in record screens.

Search Views

Different sets of search criteria represented by different fields on the **Filter** tab of a Search Screen. All available Search Views are displayed in the **Current View** drop-down list on the toolbar of a Search Screen.

Security

A level of access protection you can set for the records you create. For example, you can make a record Private or Public or you can grant or deny the rights to read, update and delete a record to other Users. All record security details can be viewed through the **Security** tab of the record.

Server

A main computer that services a network or part of a network. For example, a server that manages the flow of email through a network is called an email server. A computer or application that utilizes a server for email messaging is called an email client. In the case of email, using it in a network is done by an email client (application), such as Microsoft Outlook.

Shortcut Key

A special key combination, using the keys on your keyboard, that causes a specific command to be executed. For example, CTRL+C will copy the selected item. Typically, shortcut keys combine the CTRL or ALT keys with some other keys.

SMTP

Short for Simple Mail Transfer Protocol, a protocol for sending email messages between servers.

Stop

An Approval node, or check-point in a Route within the TeamConnect Workflow. Each stop consists of a certain number of Approvers, whose authorization is required for a pending action. Each approval route may have several stops. If you are an approver, you receive the approval request when it reaches your stop.

Super User

A user who is given the rights to access TeamConnect records marked as **Private**.

T

Tab

A user interface element that is displayed at the top of record screens. When clicked, each tab opens a new set of information from the record.

Task

Internal assignments for TeamConnect Users. For example, preparing reports, reviewing documentation, and other activities could be considered tasks. Tasks can be project-specific (associated with a particular Project) or global (not associated with projects). They can also be billable (posted against an account) or non-billable (a task without a cost).

Template

A computer file with a pre-designed format and structure, for example, for a fax, letter, or expense report, which can be copied to serve as a pattern or model for additional files of the same type.

Territory

A geographic area with which a Contact is associated. You can associate several territories to a contact.

Transaction

Events in your business that change its financial position, such as buying supplies, paying bills, withdrawing money, or buying equipment. For example, Expenses, Tasks, and Invoices in addition to regular money withdrawals from and transfers between Accounts are transactions. Transactions are posted or completed against accounts.

U

User

Persons who have access to TeamConnect. Unlike Contacts, each user has his or her own username and password, which is recorded in his or her user account (accessible only by the Administrator). Users have Rights assigned to them according to their roles within the organization, which allow them to use the appropriate areas of TeamConnect.

Unlike contacts, users can be assigned to tasks and matters and can be attendees of appointments.

V

Vendor

Outside Contacts with whom your organization conducts business. These can be suppliers of goods or services, hotels, travel agents, outside counsels, independent consultants, and so on.

Version Control

A method of tracking the edits made to a document that is uploaded to TeamConnect. Version control allows users to access previous versions of a document, and even revert the current version back to a previous version if needed. Version control must be activated by the TeamConnect Administrator.

W

Wizard

A utility within TeamConnect that defines information that needs to be captured to create valid Records. A wizard guides the user through the entire process of capturing the record for the first time. It automatically determines the sequence of steps in which the user should collect data by displaying the appropriate pages on the screen and prompting the user what information needs to be entered. For example, the Appointment Scheduler is a wizard. Other wizards may be defined specifically for your organization.

Workflow

A defined sequence of activities within an organization to produce a final outcome. For example, a request to post an invoice might be automatically routed from staff members to a manager to a director for approval, before it is posted to the appropriate budgets. At each stage in the workflow, one or more users are responsible for specific activities. Once the operation is complete (for example, the approval for posting the invoice is obtained), TeamConnect ensures that the users responsible for the next operation receive the data they need to execute their stage of the process.

TeamConnect's standard workflow consists only of approval processes. However, your workflow process could be designed to extend beyond the approval processes to include other activities that help to move information and tasks through your organization.

Index

- A -

accessibility 449
  assistive technology 450
  enabling 449
  keyboard shortcuts 451
accessibility mode 24
accounts 240
  activating 250
  adding funds 251
  categories 248
  child 250
  creating 242
  deactivating 250
  editing 242
  General page 242
  history 267
  parent 249
  posting criteria 253
  relationships 248
  subtracting funds 251
  transactions 266
  transferring funds 252
  viewing 241
adding documents 362
address books 133
  adding contacts 137
  contacts 135
  creating 136
  private 138
  public 138
  removing contacts 138
  subscribing 134
adjusting invoices
  line item history 343
  line items 324
  new amounts 342
  summaries 317
  summary history 343
All tab 39
appointment calendar 23
appointments 215
  attendees 223
  categories 223
  creating 218
  editing 218
  General page 219
  history 225
  opening 218
  outlook 218
  resources 224
  Scheduler 221
approval 446
approval history 401
approval processes
  email notifications 407
  requests 408
approval requests 408
  approving 417
  canceling 413
  completed 411
  managing 414
  pending approvals 414
  reassigning 439
  rejecting 417
  sending for review 425
  viewing 409
approval schedule 401
approvals 405
approving requests 417
  through email 423
  within records 420
assistive technology 450
  JAWS 450
authenticating users 12

- B -

batch entries 77
  deleting 79
  editing 79
  primary entries 78
budget requests 345
  adjusting 349
  canceling 350
  deleting 351
  editing 348
  handling 351
  submitting 348
  vendors 348

building reports 177
Chart page 194
Data page 179
data series 179
General page 178
Schedule page 201
scheduling 201
Security page 203
business object reports
running 31

- C -

cached reports 171
calendar 215
viewing 216
charts 194
child accounts 250
collections 41
subscribing 42
combining data series 190
best practices 194
join conditions 190
results display 192
sample 192
contacts 111
address books 123
card view 113
categories 123
company 130
creating 114
details 121
duplicates 120
employees 130
general information 120
involvement 131
list view 113
rates 124
related 129
skills 129
territories 130
creating records 66
batch entries 77
categories 80
copying 85
fields 72
importing data 89
saving 83
wizards 68
cross object 209
custom search 50
additional fields 56
executing 58
operators 52
results 58
saving 59
search criteria 50

- D -

data series 179
combining 190
creating 181
data 182
filtering 184
results display 187
date format 20
document folders
creating 368
deleting 384
exporting 369
documents 353
adding 362
canceling 368
categories 383
checking in 367
checking out 366
collections 361
copying 370
deleting 384
downloading 376
editing 365
email 385
folders 368
General page 380
generating 377
history 383
IMAP 385
managing 362
moving 373
printing 383
reverting 382
searching 356
shortcuts 374
versions 382
viewing 357

documents 353
Web page links 375
Windows Explorer 379
drill-down reports 170

- E -

editing documents 365
canceling 368
checking in 367
checking out 366
editing multiple records 69
editing records 68
locking 71
reassigning 88
email 391
attachments 395
deleting 396
downloading 395
folders 391
messages 393
searching 395
security 397
sharing 399
subfolders 396
email clients 389
differences 390
operations 390
email notifications 25
enable email approvals
email 405
exchange rates 351
executing search 58
Expense Entry Tool 276
adding 277
copying 279
deleting 281
editing 280
posting 280
Expense Unit Prices 281
expenses 267
creating 269
editing 269
Expense Entry Tool 276
General page 270
history 276
posting 275
preparing 272
transactions 276
unit prices 281
viewing 269
voiding 276
exporting reports 177
exporting search 60

- F -

finance 239
accounts 240
budget requests 345
expenses 267
invoices 284
Finance tab 239
frequently asked questions
address books for users 463
contacts 463
from users 460
questions 465
records 461
reports 463

- G -

getting started
users 12
global navigation bar 39
global search 46
glossary
for users 466

- H -

Hold 446
hold conditions 446
home page settings
modifying 33
home pages 28
synchronizing 37
working with 29
hover feature 18

- I -

IMAP 385

IMAP 385
email 391
email clients 389
operations 390
refreshing Lotus Notes 389
refreshing Outlook 387
setting up 386
setting up Lotus Notes 388
setting up Outlook 386
importing data 92
data file 90
invoice line items
adding 305
adjusting 324
copying 308
deleting 311
editing 310
searching 289
invoice versions 295
viewing 296
invoices 284
adjusting 317
approving 334
creating 299
currencies 296
differences 293
duplicates 295
editing 309
history 343
new amounts 342
posting 315
preparing 312
rejecting 335
reviewing 338
sending for review 337
Summary Breakdowns page 340
timekeeper rates 304
transactions 344
versions 295
viewing 287
voiding 338
with workflow 297
without workflow 297
workflow 344
involved parties 154
accounts 158
adding 155
editing 155
related 158
roles 157
status 157

- K -

keyboard shortcuts 451
additional 453
common 451
TeamConnect-specific 454

- L -

localizing 203
log in 13
log out 16
logging in 13
logging out 16
login 13
logout 16

- M -

mass editing records 69
milestones 159
appointments 161
categories 161
creating 159
editing 159
tasks 161
viewing 159
mobile 456
contacting a vendor 460
invoice adjustments 458
invoice details 458
invoices 457
pending approval 457
multi-column sort 62
multiple object reporting 209
My Approvals 414
My Requests 409
My Workflow Processes
Attention Required 431
Completed 436
In Progress 431

- O -

online help 18

- P -

page title 33
parent accounts 249
password
  reset 24
portal panes 28
  adding to home pages 32
  editing 36
  information 30
  layout 34
  modifying search views 34
  synchronizing 37
posting criteria 253
posting expenses 275
  preparing 272
posting invoices 315
  preparing 312
process manager activities 430
processes 446
project contacts 149
  adding 151
  primary assignee 152
  removing 154
  unassigning 153
  viewing 150
projects 139
  accounts 163
  appointments 162
  categories 148
  child 145
  contacts 149
  creating 140
  editing 146
  embedded 145
  expenses 162
  involved parties 154
  milestones 159
  phases 149
  related 154
  tasks 161
  types 145
public record
  private record 105

- R -

reassigning approval requests 439
Reassignment page 439
record history 106
  categories 109
  creating 109
  opening 107
  viewing 108
record security 102, 105
  editing 105
  viewing 104
records 37
  batch entries 77
  canceling edits 83
  categories 80
  check-box 72
  collections 41
  copying 85
  creating 66
  date field 72
  deleting 98
  documents 111
  drop-down lists 73
  editing 68
  fields 72
  history 106
  importing data 89
  list box fields 75
  list fields 73
  locking 71
  memo text 76
  multiple 69
  number fields 76
  options buttons 77
  printing 101
  reassigning 88
  related 110
  saving 83
  searching 44
  security 102
  sorting 61
  text fields 77
  time zone fields 73
  types 39

records 37
unsaved 84
viewing 64
wizards 68
workflow 111
region 20
rejecting requests 417
through email 423
within records 420
report security 203
reporting 209
reporting FAQ 209
reports 163
appearance 172
building 177
cached 171
Chart page 194
dashboards 166
Data page 179
data series 179
drill-down 170
exporting 177
folders 167
General page 178
localizing 203
portal panes 166
running 169
Schedule page 201
Security page 203
types 174
viewing 164
reviews 427
running reports 169
scheduling 201

- S -

saving search 59
scheduled reports 201
activating 202
deactivating 202
deleting 203
editing 201
run time 203
running 203
viewing 202
Scheduler 221
screen appearance 24
search 44
custom 50
exporting 60
global 46
modifying 49
modules 59
search criteria 50
search operators 52
search results 58
setting up IMAP 386
settings 20
changing 19
other 27
personalizing 19
search result 22
single sign-on 12
single-column sort 61
sorting
multi-column 62
single-column 61
sorting records 61
submitting reviews
through My Approvals 428
through records 429

- T -

task entry tool 235
creating 236
deleting 239
editing 238
posting 238
tasks 225
assigning 232
creating 228
editing 228
General page 226
history 235
posting 233
task entry tool 235
transactions 235
viewing 226
voiding 234
wizards 227
TeamConnect Enterprise
users 12

TeamConnect Mobile 456
time format 20
time interval 23
troubleshooting
for users 465
types of projects 145
child 145
embedded 145

- U -

unsaved records 84
user interface 17

- V -

voiding expenses 276

- W -

web browser 18
web browser buttons 18
workflow 399, 446
workflow processes
email approvals 405
issues 431
monitoring 431
reassigning 438
returning requests 437
reviewing 436
workflow reviews 425