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MITRATECH

TeamConnect® Enterprise 5.2

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Release Notes

TeamConnect™ Enterprise 5.2 Release Notes

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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

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1 Enterprise 5.2 Release Notes

This document details the new features, changes, resolved issues, and known issues that are included in TeamConnect 5.2.

System Requirements	Enhancements
Known Issues	Localization Keys

1.1 TeamConnect 5.2 System Requirements

Before you begin to install TeamConnect 5.2, ensure that your system meets the requirements. For a full list of requirements, refer to the [Installation Requirements](#) in the [Installation Guide](#).

TeamConnect 5.2 can be upgraded to from the following versions:

- TeamConnect 5.0
- TeamConnect 5.0.1 and 5.0.2
- TeamConnect 5.1

TeamConnect 5.2 is designed to pair with the following versions of modules (notes below reflect the available versions as of the TeamConnect 5.2 release date):

- AP Link 5.0
- CSM 5.0, 5.0.1, 5.0.2
- Data Warehouse 5.0, 5.0.1, 5.0.2, 5.1
Note: Users on TCE 5.2 will not be able to connect to Data Warehouse if they are running SQL Server 2016 for their TeamConnect AND Data Warehouse databases as well as WebSphere 8.5.5.
- Financial Management 5.0
- Legal Matter Management 5.0, 5.0.1
- Office Suite 2.1.1 and later 2.1 updates
- Screen Designer 5.2

The following changes to the system requirements should be noted for both new installations and upgraded instances:

- Users must upgrade to Java 8 (JDK 1.8) for TeamConnect to function. More information on setting the appropriate path and installing JDK 1.8 can be found in the Java documentation [here](#).

- In order to leverage Sharepoint Online DMS integrations, users must ensure that the Baltimore CyberTrust Root certificate is installed in their application's truststore. This certificate is key to enabling utility of many Microsoft web services applications.
- TeamConnect supports SQL Server 2016 as of TeamConnect 5.1.
- WebLogic 11g is no longer supported as of TeamConnect 5.1. WebLogic users should upgrade to WebLogic 12c to maintain compatibility with Java 8.
- Users who have implemented custom color profiles will need reupload their custom color profiles after upgrade (LESS files). These files do not need to be recreated; uploading (and thereby rewriting these files) will recompile the CSS and ensure that the color profiles work as designed.
- Users looking to take advantage of TeamConnect's Elasticsearch integration for global search must upgrade to Elasticsearch 5.3.0. **Upgrading Elasticsearch will require users to re-index their instance.** Preliminary testing finds that it takes roughly one hour per 4GB for indexing. This number will vary based on the types of files present in the index. **Note:** For detail on how to complete this re-indexing, please see "Indexing Objects" on the Identifying Parts of the Index Tool help page in the TeamConnect 5.2 guide.

1.2 TeamConnect 5.2 Enhancements

Client Success Center

TeamConnect documentation is now hosted at the Mitratesh Client Success Center, success.mitratesh.com. The new success portal leverages all of our existing help and knowledge base articles in one location. Likewise, the site's fully responsive design allows users to access the help efficiently from multiple devices. Along with these features, users also benefit from:

- **Robust search and filtering capabilities** – After typing in a search, users can take advantage of filters (in the form of large icons) to drill down to the exact content they need. Specific to your user type and use case, this search feature ensures your result matches your problem, not just your keywords.

Help results for

The screenshot shows a search interface with a search bar containing the word "Invoice". Below the search bar, it says "Searching in All results" and "Collaborati Refine results by selecting a filter." There are five filter buttons: "Collaborati User Help" (with a person icon), "Frequently Asked Questions" (with a question mark icon), "Collaborati Administrator Help" (with a person in a suit icon), "Collaborati Help Videos" (with a play button icon), and "Collaborati Release Notes" (with a document icon). Below these buttons, there is a highlighted result for "Uploading LEDES Invoices" with the URL "https://success.mitratesh.com/Collaborati/Collaborati_Help_Videos/Uploading_LEDES_Invoices" and the description "Video details for uploading and configuring LEDES invoices."

- **Direct-to-Team Feedback** – Users can deliver feedback on the bottom of pages, letting the Mitratch documentation team know which sections were most helpful or which could use a little elaboration.

Was this article helpful?  Yes  No  Leave feedback

How can we improve this article?

This article solved my problem, but I would also like more detail on Rate Requests based on different personas.

Yes, you may contact me about this feedback.

- **Instant PDF Creation** – Users can generate a PDF copy of any page by clicking the icon in the top-right corner of the document.



- **Smart, user-centered suggestions** – The success center also displays recommended articles based on typical user paths, learning from users just as they learn from the content itself. Complex tasks can be achieved step-by-step without having to view a wall of text, ensuring that each process follows best practices.

Recommended articles



Document Management System (DMS) Connector

TeamConnect 5.2 provides users with seamless integration to external document management systems for robust, user-friendly control over your documents. TeamConnect currently only supports Sharepoint Online as well as iManage 10 for outside DMS connections out-of-the-box. Upon downloading TeamConnect 5.2 from the Maestro client, the download package will include the respective properties files for these integrations. Users can download and drop these files into the **Top Level > System > Integrations** folder.

By navigating to the **DMS Connector** under **Tools** in TeamConnect, administrators can add new DMS connections as well as set the default DMS for their team's document storage. The documents are fully integrated into TeamConnect global search (upon indexing), and accessible via API and within the Screen Designer module.

Support for External DMS Systems

Users can however configure TeamConnect to add other DMS connections, including a proprietary DMS.

For more information, please see the help pages on the DMS Connector.

Support for Screen Designer Enhancements

TeamConnect 5.2 coincides with the release of Screen Designer 5.2, TeamConnect's platform for user-friendly custom screen design. This release included the following enhancements:

Ease of Use Enhancements

Enhancement: Users are able to drag-and-drop onto the canvas while scrolling. This allows users designing with smaller windows or larger screens to quickly add elements in one motion.

Tracking code: TC-5685, TC-7296

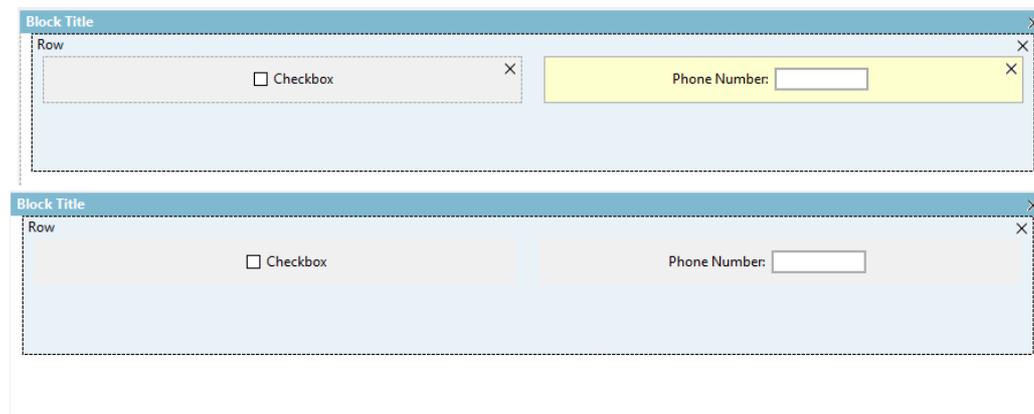
Enhancement: When a given field or object is selected, it will be highlighted so that users can more easily see which part of the screen they are designing.

Tracking code: TC-8707

Enhancement: From the **View** tab at the top of the screen, users can toggle grid visibility. This will adjust whether or not borders are present on elements on the screen while designing.

Tracking code: TC-7309

Additional detail:The image above is Grid Visibility on, while the lower graphic is Grid Visibility off.



Publishing Enhancements

Enhancement: After initially publishing a block, the publishing dialog box will preserve your settings to save clicks when publishing multiple updates for the same screen.

Tracking code: TC-5742, TC-7337

Enhancement: The "Title" property has been added for designating the hover-over text on a given field.

Tracking code: TC-5643

Additional detail:

Property	Value
label	Phone Number
key	
id	
name *	
category	
forceEditable	
forceNotEditable	true
checked	
onClick	
labelFontFamily	
labelFontSize	
labelFontColor	
colon	true
title	Primary Phone Number

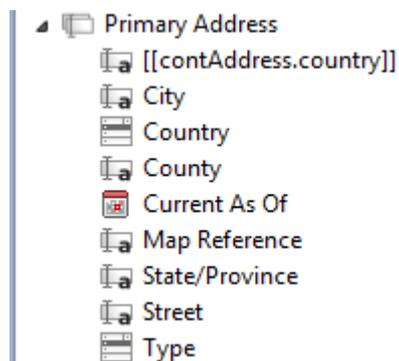
Enhancement: Blocks are alphabetically sorted in the publishing drop-down list.

Tracking code: TC-7591

Enhancement: When items within a Category are children of a parent category/object, they will now appear as nested, indented items underneath the parent object.

Tracking code: TC-5680

Additional detail:



Layout and Design Enhancements

Enhancement: A row object has been created to house all fields within a block.

Tracking code: TC-7305, TC-7588

Additional detail: Rows can be configured to have disproportionate column widths. For more information, please see the *Creating a New Block* page in the Screen Designer 5.2 Help Guide.

Enhancement: Memo field labels can now be "top-aligned" or "middle-aligned."

Tracking code: TC-7745

Enhancement: Row functionality applies to JSP elements as well as standard/advanced elements.

Tracking code: TC-8347

Enhancement: A new element "Empty" is available and can be used to add spacing to your screens.

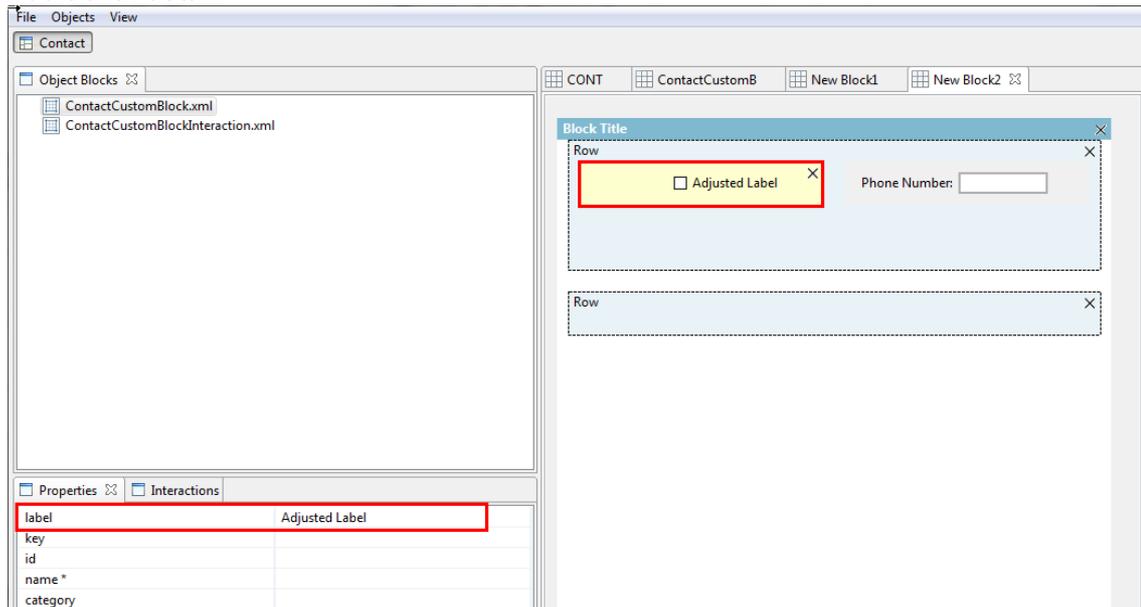
Tracking code: TC-7131

Additional detail: The element adds an empty <div> to the screen to adjust positioning of other items.

Changes to Properties and Elements

Enhancement: Users can change the field label text from the **Label** property without having to enter the XML editing view.

Tracking code: TC-5670

Additional detail:

Enhancement: The "colon" property has been added so that users can show or hide colons after labels. Setting the property to "true" will display the colon, while setting to false will remove the colon.

Tracking code: TC-5671, TC-7578

Enhancement: Users can drag in reports and report parameters to be used in Screen Designer. This functionality was present in the initial 1.x Screen Designer release.

Tracking code: TC-5682

Additional detail: For more information on using reports, please see *Reporting and Screen Designer* in the Screen Designer Help.

Enhancement: The "Current Phase" system field is available in Screen Designer and can be used in designing interactions. This is a read-only field in TCE.

Tracking code: TC-5673

Additional detail: The Current Phase field can be leveraged in Interactions to show or hide fields based on the matter phase. For example, users can designate that if the Current Phase field EQUALS "closed," a designated field can be automatically hidden.

Interactions Enhancements

Enhancement: After creating an interaction, the inverse condition is automatically created. Users do not need to manually define the opposite of their action. This applies to both show/hide functionality as well as required/not required and will only apply to newly created interactions. As an example, if a user set a given field to "show" if the Current Phase is "Closed," the user does not need to manually create a "hide" condition for all phases besides "Closed."

Tracking code: TC-5646

Additional detail: Users should make sure when deleting interactions that they remove both interactions, as unintended duplicate interactions can result from creating new interactions after only deleting half of the pre-existing interaction. This automatic inverse creation does not apply to numeric-type fields. Users will need to refresh after creating a new interaction to see the inverse condition listed.

Enhancement: Show/Hide functionality can be applied to entire blocks.

Tracking code: TC-5647

Additional detail: Click and highlight the block to begin designing block interactions. Hiding an entire block will override field settings, e.g., a field set to "show" will not be visible if it is within a hidden block.

Enhancement: The **Contains** and **Does Not Contain** operator has been added for use in interactions.

Tracking code: TC-7467, TC-90141

Additional detail: For more information on how the Contains operator functions, please see the **Interactions** page of the Screen Designer Help.

Enhancement: There is an Interactions tab at the bottom of the canvas that serves as a master list of all created interactions.

Tracking code: TC-9702

1.3 TeamConnect 5.2 Known Issues

The following items are known TeamConnect Enterprise 5.2 limitations. Each known issue is documented in the following format:

- A description of the issue
- Tracking code

- Workaround, if available

Issue: A maximum of 1000 documents can be synced at a time for iManage DMS integrations.

Tracking code: TC-12773

Issue: Error is generated when creating a document with Document Generator by automated rule trigger. This error exists only in instances with a DMS Integration, Office/Outlook Integration, and a rule designed to trigger Document Generator on an existing Custom Object.

Tracking code: TC-12062

Issue: For search views that contain an external DMS field, error is thrown when attempting a mass edit on that search view.

Tracking code: TC-12048

Issue: Error is thrown when a Document Library Name for a DMS Integration contains a period.

Tracking code: TC-9603

Workaround: Do not include periods in Document Library Name.

Issue: The 'State' list box displays countries rather than states while in the Screen Designer application. Within the TeamConnect application itself, this list will function as designed and show states.

Tracking code: TC-12721

Issue: The 'revert version' functionality for documents cannot be utilized for documents held in an external DMS.

Tracking code: TC-13017

1.4 TeamConnect 5.2 Localization Keys

The following document outlines the changes to localization keys and values present in the TeamConnect 5.2 platform. There have not been significant changes introduced as of 5.2; however, users upgrading from 4.x or previous are encouraged to read the [Localization Key Changes PDF](#) for TeamConnect 5.0.

Old

webapp.suffix=- TeamConnect 5.0
email.forgotPassword.body.request=you
recently requested to reset your password.
Please click on the button below to start the
Password reset process.

New

webapp.suffix=- TeamConnect 5.2
email.forgotPassword.body.request=you
recently requested to reset your password.
Please click on the link below to start the
Password reset process.