

Release Notes

Document ID: fmr_50_u2_rn_1

This document details the upgrade information, new features, resolved issues, and known issues that are included in Financial Management 5.0.2.

1 System Requirements

To install TeamConnect Financial Management 5.0.2, you must be running TeamConnect Enterprise 5.0 or later.

TeamConnect Financial Management 5.0.2 is compatible with the following optional TeamConnect products:

- TeamConnect Legal Matter Management 5.0 or later
- Collaborati Spend Management 5.0 or later

User utilizing line item level non-US taxes should contact Mitratesch support regarding their upgrade.

Note: Any changes to the Budget Screen Custom Java Blocks (CJBs) must be applied not only to the screens used by the Module Setup Tool to add budgets to custom objects, but also to any custom objects that have already had budgets added to them.

2 Upgrading

For users upgrading from Financial Management 5.0.1 to 5.0.2:

Please follow the below steps

1. Continue to Step 1 under the Installation section of this document.

For users upgrading from Financial Management 5.0.0 to 5.0.1:

1. Navigate to setup in TeamConnect and open Record Transaction History, which is an embedded object under Cost Center.
2. Convert the existing Record Transaction History embedded object into a Child object definition by clicking on the Convert to Child object definition button available under the General tab.
3. Continue to Step 1 under the Installation section of this document.

For users upgrading from Financial Management 5.0.0 Patch 1 to 5.0.1:

1. Record Transaction History under Cost Centers is converted to a child object.
2. Delete the following two custom Messages:
To find these, go into your TeamConnect instance and click *Setup*, then choose *System settings*, and click on *Custom messages*.
 - custom.common.fm.matter.budgetView.collapseRow
 - custom.common.fm.matter.budgetView.expandRow
3. Continue to Step 1 under the Installation section of this document.

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3 Installation

You must have admin rights to install this product.

To install TeamConnect Financial Management 5.0.2:

1. In TeamConnect, click the Admin tab, and then click the Admin Settings sub-tab link.
2. In the left pane, click the About link.
3. In the Available Updates section, click Show Updates Available for Installed Products.
4. Locate TeamConnect Financial Management 5.0.2.
5. Click Install Now.
6. If the installation is successful, restart TeamConnect.

Note: *If the installation is not successful, TeamConnect Financial Management 5.0.2 does not appear as an Installed Product.*

4 Resolved Issues

This section describes the issues that are resolved in the Financial Management 5.0.2 release. Financial Management 5.0.2 introduces defect resolutions from previous releases as noted below. Each resolved issue is documented in the following format:

- A description of the issue
- Internal tracking code
- Case number

Issue: Budget Template checkbox fields were not editable.

Tracking code: SUPPORTPRI-45475

Case number: 2018-1217-496444

Issue: Resolved an object view issue where users couldn't move the Cost Center Tab and save changes.

Tracking code: SUPPORTPRI-30514

Case number: 2017-0609-377631

Issue: Resolved an exception when changing the values for Fiscal Year when creating a matter budget.

Tracking code: SUPPORTPRI-29193

Case number: 2017-0427-368518

Issue: Error occurred when user tried to edit a budget and add a vendor to it.

Tracking code: SUPPORTPRI-35299

Case number: 2018-0109-424455