

This document details the upgrade information, new features, resolved issues, and known issues that are included in Financial Management 6.3.

1 System Requirements

To install TeamConnect Financial Management 6.3, you must be running TeamConnect Enterprise 6.3 or later.

TeamConnect Financial Management 6.3 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 Installation

You must have admin rights to install this product.

To install TeamConnect Financial Management 6.3:

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 6.3.
5. Click Install Now.
6. If the installation is successful, restart TeamConnect.

Note: If the installation is not successful, TeamConnect Financial Management 6.3 does not appear as an Installed Product.

3 New Features

Matter Budget Insights

The Matter Budget Insights widget displays the Total budget account associated with a selected matter. This widget analyzes the Vendor accounts allocated and to review total spending and the budget for the linked Matter of an invoice. Added a custom block in the Matter Budget Insight widget that helps to hold the Matter Budget.

The Matter Budget Insights widget displays the following information in the form of charts:

1. Total matter budget
2. Total matter spend
3. With this Invoice approved
4. With all Pending Invoices Approved
5. This Invoice amount

Enhancement: MBI - Disclaimer for Tax, Always display System currency & Include Internal Expenses

Description:

The following information is displayed in the MBI widget depending on the budget selection for Disclaimer on Tax, Matter Budget Insights system currency & Include Internal expenses:

- In Vendor Budgets:
 - The amounts in the Matter Budget Insights are inclusive of taxes and are always displayed in the system currency.
- In Matter Budgets
 - The amounts in the Matter Budget Insights are inclusive of taxes, internal expenses and are always displayed in the system currency

Tracking Code: TC-35112

Enhancement: Update Matter / Vendor Labels in MBI

Description:

The following changes are implemented to improve the Matter Budget Insight depending on the drop-down value selected:

- The word Matter is highlighted when selected in the dropdown is a Matter Budget (any).
- The word Vendor is highlighted when selected in the dropdown is a Vendor Budget (any).

Tracking Code: TC-35073

Enhancement: MBI block to be hidden before WF & after Invoice Approval

Description:

The MBI block is hidden for the following scenarios:

- When an Invoice is not in the workflow.
- In the approved Invoice of the workflow.

Tracking Code: TC-35051

Enhancement: Matter Budget Insights - Auto Refresh

Description:

When adjustments are made in the Invoice, the new number values, percentages, and bar charts are updated in the Matter Budget Insights block by Auto-refresh.

Tracking Code: TC-34966

Enhancement: Matter Budget Insights - Error Messages

Description:

- When the user/reviewer is looking at an invoice that has more than one matter's line items in it, the system displays an error message as

"Matter Budget Insights is not available for invoices with line items from more than one matter.

Invoices with line items from more than one matter (Multi-Matter Invoices) can be automatically rejected, globally, by a TeamConnect system administrator in Setup -> Invoice Validation Rule Setting -> CSM (Validation) - Do Not Allow Multi-Matter Invoice except Line Item Projects with Specified Project Categories.

For more information, contact Mitratesch Support.***



- If user/reviewers are unable to locate a budget for the matter, the system displays an error message in the Matter Budget Insights block

"Matter Budget Insights is not available for invoices with no budget configured."

- If ANY of the line items are missing in a matter assignment, then hide the panel and display the below error message:

"Matter Budget Insights is not available for invoices which contain line items not associated with a matter."

Tracking Code: TC-34962

Enhancement: MBI - When Adjustment is made to an Invoice, MBI widget to get updated in accordance with new values in Invoice

Description: When a user modifies the adjusted value of the invoice currency, the system displays the updated value and currency symbol in the Matter Budget Insight widget.

Tracking Code: TC-34729

Enhancement: MBI - Always display System currency

Description: The following values in Matter Budget Insights are required to be displayed in the system currency:

- This Invoice Amount
- Allocated Matter Budget Bar
- Total Matter Budget Spend Bar
- With Invoice Approved Bar
- With Pending Approved Bar
- Average Monthly Spend

Tracking Code: TC-34727

Enhancement: Matter Budget Insights - Dropdown Interactivity

Description: Introduced a new Showing Budget for drop-down field with the following values:

- **All** - Displays the consolidated budget view of months, quarters & years.
- **Monthly** - Displays the monthly budgets as per the current Invoice.
- **Quarterly** - Displays the quarterly budgets as per the current Invoice.
- **Yearly** - Displays the yearly budgets as per the current Invoice.

Color code: Red: #F15054, Yellow: #FAB43B, Green: #BED167, Dark red: #BC0F13.

Tracking Code: TC-34625

Enhancement: Matter Budget Insights Design – Enhancements

Description: Renamed the top two horizontal bars of Matter Budget Insights:

- Total Lifetime matter budget as Allocated Matter Budget with color code as #4599BA.
- Total Lifetime matter spends as Total Matter Budget Spend.

When the user reloads the page, the system displays the latest amount in the Allocated Matter Budget bar in the allocated budget. The changes in the adjusted amount is displayed in The Invoice Amount data container.

Tracking Code: TC-34624

Enhancement: Matter Budget Insights - Custom block

Description: Introduced a custom block to hold the following in the Matter Budget Insight widget:

- Budget associated with a particular legal matter
- All the invoices related to the same budget
- Matter Information (Matter opened on, Matter Age, Total Invoices & Average Monthly spend)

The associated data for matter budget insight needs to be identified, extracted, and displayed in the current custom block.

Tracking Code: TC-34284

Enhancement: Matter Budget Insights - Matter Details & Age, Approved Invoices & Average Monthly spend

Description: Introduced a column in the Matter Budget Insights widget to view the following data of the current invoice:

- Matter opened date: Format date by grabbing Native TC style
- Matter Age: Displays the Matter Age as zero (0) if the legal matter age is below a month.
- Average Monthly Spend: Displays the Amount approved / Number of months if Number of months = 0.

Tracking Code: TC-33973

Enhancement: Matter Budget Insights - This Invoice amount

Description:

Introduced This Invoice Amount horizontal clickable bar. The percentage data is displayed in the brackets towards the right side of the bar which has the color codes Red: #F15054, Yellow: #FAB43B, Green: #BED167, Dark red: #BC0F13.

Tracking Code: TC-33972

Enhancement: Matter Budget Insights - With all Pending Invoices Bar

Description:

Introduced With all Pending Invoices horizontal bar to view the pending invoices of the matter. The percentage data is displayed in the brackets towards the right side of the bar which has the color codes Red: #F15054, Yellow: #FAB43B, Green: #BED167, Dark red: #BC0F13.

Tracking Code: TC-33971

Enhancement: Matter Budget Insights - Total Life time matter Budget / Total Life time matter spend / With this Invoice approved Bars

Description:

Introduced the following horizontal bars in the Matter Budget Insights:

1. Total Lifetime matter budget
2. Total Lifetime matter spend
3. With this Invoice approved

The above titles are displayed to the left of the horizontal bar and the percentage of the data is displayed towards the right side of the bar.

The source of the data needs to be identified, extracted and loaded onto the Matter budget Insight widget towards the right end of the horizontal bar.

The system does not display the Multi Matter Invoices in Matter budget Insight widget.

Added a new Showing Budget for drop-down field with the following values:

- **All** - Displays the consolidated budget view of months, quarters & years.
- **Monthly** - Displays the monthly budgets as per the current Invoice.
- **Quarterly** - Displays the quarterly budgets as per the current Invoice.
- **Yearly** - Displays the yearly budgets as per the current Invoice.

Tracking Code: TC-33969

Enhancement: - Matter Budget Insights Interactivity

Description:

- The left side widget has 5 clickable horizontal bar charts.
- On clicking any of the bar charts, the system reacts and updates the value on the horizontal bar chart on the right widget. Reacts is defined by the vertical line indicator appearing to point at the position on the right bar chart where the value is represented
- By default, the system displays the Allocated Matter Budget value.
- There is no "cleared" position - some value is always indicated
- If the budget type for that matter is an Annual (instead of lifetime) budget, update the word Lifetime in the panel with Annual.
- If the spent value exceeds the budget value in terms of the percentages displayed in the right bar, the system "pins" the vertical line against the farthest right point on the bar.
- The system updates the label on the vertical bar indicator with dollar amounts and percentages that exceed the limit of the scale of the bar.
- The right side horizontal bar displays the following percentile values:
 - Green = 0 to 80%
 - Orange = greater than 80% to 100%
 - Red = greater than 100% to 125%
 - Dark Red = greater than 125%.

Tracking Code: TC-33045

3 Resolved Issues

This section describes the issues that are resolved in the Financial Management 6.3 release. Financial Management 6.3 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 Error on editing budget for adding involved party.

Tracking code: SUPPORTPRI-49778

Case number: 2018-0109-424455

Issue: Deleting category associated with already added vendor role causes errors on budget screens.

Tracking code: SUPPORTPRI-49852

Case number: 2019-0522-528904

Issue: Editing a matter budget generates "Expected BEGIN_ARRAY but was STRING" Error.

Tracking code: SUPPORTPRI-50483

Case number: 2019-0710-539225

Issue: Budgets - Reducing the budget amounts displays incorrect values on the Budgets screen.

Tracking code: SUPPORTPRI-51080

Case number: 2019-0815-547498

Issue: Invoice Cost Center Screen showing wrong display name for cost centers.

Tracking code: SUPPORTPRI-50445

Issue: ENABLE AUTOMATIC ACCOUNT CREATION > Does not work.

Tracking code: SUPPORTPRI-50951

Case number: 2019-0805-544444