TeamConnect Enterprise® 6.3

Release Notes **Document ID: tce_63_m_1**

This document details the upgrade information, new features, resolved issues, and known issues that are included in TeamConnect Enterprise® 6.3.

1 System Requirements

Before you begin to install TeamConnect 6.3, ensure that your system meets the requirements. For a full list of requirements, refer to the Installation Requirements in the *TeamConnect Enterprise 6.3 Installation Guide*.

The following versions of TeamConnect can be upgraded to TeamConnect 6.3:

TeamConnect 5.0 (through 5.0.10)
TeamConnect 5.1 (through 5.1.1)
TeamConnect 5.2 (through 5.2.10)
TeamConnect 6.0 (through 6.0.2)
TeamConnect 6.1 (through 6.1.2)
TeamConnect 6.2 (through 6.2.5)

TeamConnect 6.3 is designed to pair with the following versions of modules (notes below reflect the available versions as of the TeamConnect 6.3 release date):

AP Link 5.0 Patch 3
CSM 6.2.4
Data Warehouse 6.2
Financial Management 6.3
Legal Matter Management 5.0.1 Patches 1-6
Office Suite 3.2.1
Screen Designer 5.2.1
Service of Process (SOP) Manager 5.1.1 Patches 1-3

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

Third Party Changes

Oracle DB – 19c (dropped support of 12c)
SQL Server – 2019 (dropped support of 2017)
Weblogic – bumped to java 8 build 261
Websphere – moved to Liberty and now support openjdk11
Elasticsearch – 7.10
Mac OS X – Catalina (10.15.6)

To upgrade to TeamConnect Enterprise® 6.3, run the TeamConnect Installer as described in the *TeamConnect Enterprise 6.3 Installation Guide.*

2 Upgrade Considerations

Third Party Changes

Oracle DB – 19c (dropped support of 12c)
SQL Server – 2019 (dropped support of 2017)
Weblogic – bumped to java 8 build 261
Websphere – moved to Liberty and now support openjdk11
Elasticsearch – 7.10
Mac OS X – Catalina (10.15.6)

Elasticsearch 7.10 Upgrade

Build a new Elasticsearch instance with 7.10 and cut over to it. This will require a reindex.

3 New Features

The list of new features is described below. The following new or updated articles have been published in the Client Success Center to accompany this release:

Elasticsearch Requirements (TCE 6.3)
Elasticsearch Setup for Teamconnect 6.3
Enabling Elasticsearch Xpack Security (TCE 6.3)
Upgrade Considerations

The following new features have been released in the TeamConnect Enterprise® 6.3. Each feature is documented in the following format:

- Feature Name
- Feature Description
- Each enhancement under that feature
- Internal Tracking Codes

ELASTICSEARCH/GLOBAL SEARCH

TeamConnect now works with Elasticsearch 7.10. The internet protocol has been changed from TCP to RestHighLevelClient for secure connections. For additional security for data in transit, we now support Elastic's native security product Xpack in place of Search Guard. ***NOTE:*** *Search Guard is no longer supported starting in this release, TCE 6.3.*

Enhancement: Basic structure of helper class and migration of indexing functions from TCP to REST
Tracking Code: TC-34931

Enhancement: Migrate mapping code from TCP to REST
Tracking Code: TC-34932

Enhancement: Migrate the logic of searching operations
Tracking Code: TC-34933

Enhancement: xPack Integration
Tracking Code: TC-34934

NATIVE REPORTING

Enhancement: Native Reporting - left outer join should filter the joined data set
Description: Left outer join is improved to fetch the relevant data of the selected data sets.
Tracking Code: TC-32613

CONFIGURATION TRANSFER UTILITY (CTU)

Pre-Check Validation

The Pre-Check Validation is used to generate a report on the design package indicating whether the pre-validation is in PASS or FAIL. The design package is deployed only if the precheck passes and customize the error messages that are displayed when the precheck fails.

The functionality of the Pre-Check Validation is to run the validation logic in the design package as well as compare the proposed updates to the Target TeamConnect Database that the design is imported.

Purpose:

The purpose of validation is to identify the possible errors of the design package before importing it to the target database (either the TeamConnect database or within the package). The validation report helps the user to identify the error that has occurred in the design package.

In the audit history, the pre-check validation report displays the name of a person who imported last, the Time of run, the number of errors encountered during the last.

LIMITATIONS

The following are the limitations of the CTU Tool.

Following are not captured by CTU as a tool:

- Report Folder
- Misc Settings
- Contact Sweeper
- XML Worksheet
- System Lookup Table >>Invoice Project Relation Type
- Embedded Objects >>List Display items

Following are not validated by Pre-check:

- Cannot validate re-order of Tabs and Blocks in Object Views
- The Look-up item delete operation is not validated at a record level by pre-check. Precheck verifies the lookup table if deleted (of the lookup item) is used in custom fields or not if yes, then pre-check throws an error.
- Pre-Check will not validate the deleted documents that are locked. Though, import identifies an error when a user tries to delete a checked-out document through an Import.
- Object Definition - Office Configurations

Details of dependencies not covered by Pre-check in current cycle:

A. Object Definition - Rules:

- Rule Dependencies(apart from object navigator):
- Approval rule >>Stop level parameters.
    - adding a hold condition that doesn't exist
    - email template that doesn't exist
- History rule >> History description block.
    - Adding a custom field in the description defined below that doesn't exist in the target environment won't be caught by pre-check.
- Only qualifier files and action files are validated. The section under "qualifier items defined below" is not validated.

Obj Navigator dependencies:

a. Obj Def Wizard -> Pre-Check cannot validate Page Transitions with navigators have dependencies.
b. Custom fields -> Custom Object
c. Custom fields -> Involved
d. Search Views -> Filter & Results Display
e. Obj Definition -> Condition
f. Obj Definition -> Rules
g. Routes -> Stops
h. Routes -> Email notification
i. Pre-check is not validated any data at the record level.

Below are not part of the Object navigator (by Current User):

- User Profile is a data limitation of Pre-Check. Obj Definition -> Obj Navigator -> User -> User data is not stored on the pre-check model so it will not validate users

Below are not covered part of the Object navigator (by Current object):*

i. Account List
ii. Active Assignee List
iii. Application
iv. Appointment List
v. Approval List
vi. Assignee List (Any items which don't use Primary Key example IsActive, is covered)
vii. Contact
viii. Created By
ix. Current Phase type (Primary Key)

x. Default category

Detail List (Pre-check covers Text, Date-Time, Attributes, etc. which doesn't use Primary Key

B. Object Definition - Object Views:

- Cannot validate re-order of Tabs and Blocks in Object Views through pre-check

C. Object Definition Templates and Template Folders:

- Only the general tab is covered currently.
- The records part is not covered.

D. Object Definition - Search Views

1. Current Phase type (this uses Primary Key)
2. Pre-Check will not validate the default sort order items.
3. Default category(this uses Primary Key)
4. Any user-related fields such as created by, modified by as pre-check does not handle user data

E. Routes

- Stops>>User Path with dependencies is not validated by pre-check.

Enhancement: CTU - Pre-Check Validation - Global Navigation
Description: To improve the validation, check on global navigation, the following changes are implemented: When exporting the changes to the global navigation tab order captures the validation changes and then import that change; Validate the following areas: Insert (Create), Update, Delete; When exporting, captures the Global navigation changes and import via CTU. **Tracking Code:** TC-32850

Enhancement: CTU - Pre-Check Validation - Group Account
Description: The pre-check validation has to capture the potential errors of the below changes in the design package on Export and import: Group Account changes; Validate Copy/Paste of an OOTB Security Group; The rights (Add, update, remove) are in an already existing group at the different security levels (system; category; field level and Tool rights).
Tracking Code: TC-32851

Enhancement: CTU - Pre-Check Validation - Home Page and Portal Panes
Description: Updated the pre-check validation to capture the potential errors of Home Page and Portal Pane changes in the design package on export and import.
Tracking Code: TC-32852

Enhancement: CTU - Pre-Check Validation - System Lookup Table
Description: Introduced a Pre-check validation to improve the System Lookup Table. The functionality of the Pre-Check Validation is to identify the potential errors in the Design Import package if the edited System Lookup Table from the source isn't available in the destination while importing the updates to the

Target TeamConnect Database or within the package itself. System Lookup changes should be captured on Export and imported via CTU.
Tracking Code: TC-32855

Enhancement: CTU - Pre-Check Validation - Object Definition Automated Qualifiers
Description: Updated the pre-check validation to capture the potential errors of Automated Qualifier changes in the design package on export and import.
Tracking Code: TC-32858

Enhancement: CTU - Pre-Check Validation - Object Definition
Description: Updated the pre-check validation to capture the potential errors in the following changes of the design package on export and import are: (1) Custom Field; (2) Display an Error if any fields are edited in the source of 'CUSTOM FIELD' isn't available in the destination.
Tracking Code: TC-32859

Enhancement: CTU - Pre-Check Validation - Object Definition Embedded Object Definition and Custom fields
Description: Updated the pre-check validation functionality in order to identify all the errors by capturing the Embedded Object Definition and Custom Field changes when exporting/import the design package via CTU. Embedded Object changes updates as follows: Object Definition Information (Name; Plural; Contact Centric; Single Object Instance Only; Settings Object Instance); Includes "Convert to Child Object Definition" function; Unique ID / Name; Category/ Custom Fields; Rules.
Tracking Code: TC-32861

Enhancement: CTU - Pre-Check Validation - Object Definition Object View
Description: Introduced a pre-check validation an Object Definition Object View. The functionality of the pre-check validation is to identify the potential errors in the Design Import package while importing the updates to the Target TeamConnect Database or within the package itself. Object Definition Object View is to capture the changes in Export/Imported via CTU.
Tracking Code: TC-32862

Enhancement: CTU - Pre-Check Validation - Object Definition Rules
Description: Introduced a pre-check validation in Object Definition Rules. The functionality of the pre-check validation is to identify the potential errors in the Design Import package while importing the updates to the Target TeamConnect Database or within the package itself. Rules captures the following changes in Export/Imported via CTU: Create; Update; Delete.
Tracking Code: TC-32864

Enhancement: CTU - Pre-Check Validation - Object Definition
Description: The pre-check validation captures the potential errors for the following changes in the design package on export and import are: Basic Object Definition; Below are the three Main Functions to pre-check: Insert, Update, Delete (delete functionality is the same for both export and import). The functionality of the pre-check validation is to identify the potential errors in the Design Import package

while importing the updates to the Target TeamConnect Database or within the package itself.
Tracking Code: TC-33551

Enhancement: CTU - Pre-Check Validation - Custom Lookup Table
Description: The system displays a pre-check validation to display all errors in the package that conflicts with the database when the user imports a new design update to a Custom Lookup Table**.**
Tracking Code: TC-32752

Enhancement: CTU - Audit trail for Pre-Check executions
Description: To improve the Audit trail for pre-check validation, the following changes are implemented: Modified the Pre-Check History block name to Pre-Check and Design Import History; Introduced the following new filters and columns to capture the Pre-check and Design Import History after importing the design changes: Function is a drop-down field with Pre-Check or Design Import which displays the selected function; Run Date: Displays the date of the pre-check; Status: Displays the status of the pre-check (Completed, Completed with Errors, Cancelled(change X or Y)); Action Run By: Displays the name of the User who performed pre-check Action; Package Name: Displays the name of the Design package name.
Tracking Code: TC-33944

Enhancement: Import identifies if and when the pre-check has been executed and with X errors
Description: Added a pop-up window to display the last (latest) Pre-check validation report with date, name of user who last imported the design and total number of errors (i.e., 0 or 2 etc.).
Tracking Code: TC-32674

Enhancement: CTU - Pre-Check validation execution progress and error count
Description: When the user imports the design changes and runs the validation check, provided the ability to view the status of the pre-check validation progress bar and the error count in the pop-up window.
Tracking Code: TC-32669

Enhancement: CTU - Import without pre-check validation
Description: The system displays a warning message if a pre-check is not done while importing a package. The users are required to acknowledge that the design import is done without a pre-check. To mitigate the risk of user error and comply with corporate policies for exceptional cases, the acting user needs to acknowledge they are not following the usual requirements.
Tracking Code: TC-32671

Enhancement: CTU - Pre-Check Validation function - UI - Button - Pre-Check and Import
Description: To execute the validation report, introduced Pre-Check Validation, Import Now buttons and removed the Apply button in the Import Details widget of UI.
Tracking Code: TC-32670

Enhancement: CTU - Capture Audit trail of user clicking Pre-Check button and executing Pre-check validation

Description: To adhere to the company audit trail compliance's user actions are captured when the user executes the pre-check validation. When the pre-check is triggered, the system captures the following points: Complete with x errors or Canceled or Failed of the design.
Tracking Code: TC-32756

Enhancement: CTU - During File Upload show a message to user if the pre-check has already been run on this design package
Description: The system now displays a validation message, "*DesignExport_xxxxxxxx_xxx.zip has already completed Pre-Check Validation on mm-dd-yyyy at {time} and has x errors*" appears when a user is uploading the design package. Renamed the 'Status' column to 'Import Status.
Tracking Code: TC-32818

Enhancement: CTU - Validate entire design package is selected when user runs the Pre-Check
Description: Updated the pre-check validation message to display an Error message, "*All changes must be selected to run the Pre-Check Validation*". As per the validation rule criteria, the pre-validation check runs on the entire design package and not on a partial list of design package changes. When a user clicks the button to run a pre-check validation, the system displays a warning message to select all changes.
Tracking Code: TC-32819

Enhancement: CTU - Pre-Check Validation - Object Definition - Categories
Description: Updated the pre-check validation functionality to identify all the errors by capturing the following custom field changes on export and import via CTU: Create, Update, Delete.
Tracking Code: TC-33943

Enhancement: CTU - Pre-Check Validation - Notifications
Description: Updated the pre-check validation functionality to identify all the errors by capturing the Notifications (Notification Templates) changes for the following fields when exporting/importing the design package via CTU: Create, Update, Delete.
Tracking Code: TC-32853

Enhancement: CTU - Pre-Check Validation - Route
Description: Updated the pre-check validation functionality to identify all the errors by capturing the Route changes for the following fields when exporting/importing the design package via CTU: Create, Update, Delete.
Tracking Code: TC-32856

Enhancement: CTU - Pre-Check Validation - Object Definition Template and Template Folder File
Description: Introduced a pre-check validation in Object Definition Template and Template Folder File. The functionality of the pre-check validation is to identify the potential errors in the Design Import package while importing the updates to the Target TeamConnect Database or within the package itself. Template and Template Folder File captures the following changes in Export/Imported via CTU: Creation of Template; Update Template (change the name of Template (or) Docx folder only); Deletion of Template
Tracking Code: TC-32867

Enhancement: CTU - Pre-Check Validation - Object Definition Screen File
Description: Introduced a pre-check validation in Object Definition Screen File. The functionality of the pre-check validation is to identify the potential errors in the Design Import package while importing the updates to the Target TeamConnect Database or within the package itself. Screen File captures the following changes in Export/Imported via CTU: Create/Insert/Add a design change; Update/Modify/Edit a design change; Delete/Remove a design change [no dependencies]; Create/Insert/Add a copy of a design change.
Tracking Code: TC-32865

Enhancement: CTU - Pre-Check Validation - Object Definition Search View
Description: Introduced a pre-check validation in Object Definition Search View. The functionality of the pre-check validation is to identify the potential errors in the Design Import package while importing the updates to the Target TeamConnect Database or within the package itself. Search View captures the following changes in Export/Imported via CTU: Create, Update, Delete. The following are the search types: Custom Search: Global Search, Search Modules, Portal Pane Searches, Related Obj Searches, Obj collection, Integrated Search.
Tracking Code: TC-32866 and TC-34316

Enhancement: CTU - Pre-Check Validation - Object Definition Wizard
Description: Introduced a pre-check validation in Object Definition Wizard. The functionality of the pre-check validation is to identify the potential errors in the Design Import package while importing the updates to the Target TeamConnect Database or within the package itself. Wizard captures the following changes in Export/Imported via CTU: Create, Update, Delete. The system displays an error if the user modifies any pages, actions, page transaction logics in the source wizards.
Tracking Code: TC-32868

Enhancement: CTU - Pre-Check Validation - Object Definition Automated Action **Description:** Introduced a pre-check validation in Object Definition Automated Action. The functionality of the pre-check validation is to identify the potential errors in the Design Import package while importing the updates to the Target TeamConnect Database or within the package itself. Automated Action captures the following changes in Export/Imported via CTU: Create, Update, Delete. The system displays an error if the user modifies the class of Automated Action in source.
Tracking Code: TC-32857

Enhancement: CTU - Pre-Check Validation - Object Definition - Categories - Import 'Involved Party' category as assignee
Description: Introduced a pre-check validation in Object Definition – Categories (for involved party). The functionality of the pre-check validation is to identify the potential errors in the Design Import package while importing the updates to the Target TeamConnect Database or within the package itself. Custom Field captures pre-check validation 'involved party' category as 'Assignee role and the changes in Export/Imported via CTU.
Tracking Code: TC-34249

INVOICE REVIEW

Matter Budget Insight

The Matter Budget Insight 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 Insight 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 amount and count of pending invoices
5. This Invoice amount

Enhancement: [EAB] Matter Budget Insight - Total matter Budget / Total matter spend / With this Invoice approved Bars

Description: Introduced the following horizontal bars in the Matter Budget Insight:

1. Total matter budget
2. Total 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** - 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-34383

Enhancement: [FM] Matter Budget Insight - Total matter Budget / Total matter spend / With this Invoice approved Bars

Description: Introduced the following horizontal bars in the Matter Budget Insight:

1. Total matter budget
2. Total 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** - 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: [FM]-Matter Budget Insight Design – Enhancements
Description: Renamed the top two horizontal bars of Matter Budget Insight:

- Total matter budget as Allocated Matter Budget with color code as #4599BA.
- Total 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: [EAB] - Matter Budget Insight Design - Enhancements
Description: Renamed the top two horizontal bars of Matter Budget Insight:

- Total matter budget as Allocated Matter Budget with color code as #4599BA.
- Total 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-34631

Enhancement: [FM] Matter Budget Insight - Dropdown Interactivity
Description: Introduced a new Showing Budget for drop-down field with the following values:

- **All** - 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: [EAB] Matter Budget Insight - Dropdown Interactivity
Description: Introduced a new Showing Budget for drop-down field with the following values:

- **All** - 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-34630

Enhancement: [FM] - MBI - Always display System currency

Description: The following values in Matter Budget Insight 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: [FM] - 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: [EAB] Matter Budget Insight - 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-33974

Enhancement: [FM] Matter Budget Insight - 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: [FM] Matter Budget Insight - Matter Details & Age, Approved Invoices & Average Monthly spend

Description: Introduced a column in the Matter Budget Insight 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: [EAB] Matter Budget Insight - Matter Details & Age, Approved Invoices & Average Monthly spend
Description: Introduced a column in the Matter Budget Insight 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-34628

Enhancement: [FM] Matter Budget Insight - 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: [EAB] Matter Budget Insight - 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-34627

Enhancement: [FM] Matter Budget Insight - 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: [FM] - Matter Budget Insight 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

Enhancement: [EAB] - Matter Budget Insight 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-34629

Enhancement: [FM] - 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: [EAB] - 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-35052

Enhancement: [FM] - Update Matter / Vendor Labels in MBI
Description:
The following changes are implemented to improvise 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: [EAB] - Update Matter / Vendor Labels in MBI
Description:
The following changes are implemented to improvise 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-35074

Enhancement: [EAB] - 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 Insight system currency & Include Internal expenses:

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

Tracking Code: TC-35097

Enhancement: [FM] - 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 Insight system currency & Include Internal expenses:

- In Vendor Budgets:

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

Tracking Code: TC-35112

Enhancement: [EAB] Matter Budget Insight - 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 Insight 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 Mitratech Support."**
- If user/reviewers are unable to locate a budget for the matter, the system displays an error message in the Matter Budget Insight block

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

Tracking Code: TC-34961

Enhancement: [FM] Matter Budget Insight - 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 Insight 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 Mitratech Support."**
- If user/reviewers are unable to locate a budget for the matter, the system displays an error message in the Matter Budget Insight block

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

Tracking Code: TC-34962

Enhancement: [EAB] Matter Budget Insight - Auto Refresh
Description:
When adjustments are made in the Invoice, the new number values, percentages, and bar charts are updated in the Matter Budget Insight block by Auto-refresh.
Tracking Code: TC-34965

Enhancement: Invoice Review - High Complexity - Page breaks - Printable view
Description: Introduced page breaks at the end of every page so that the layout ends on the current page, and the remaining elements of the document are on a new page in a printable view.
Tracking Code: TC-34365

Enhancement: Slickgrid to match date format with user/system settings
Description: Updated date format in the slick grid that matches the User/System settings across all the places where the date (Date Column, Adjustment History) is displayed.
Tracking Code: TC-34562

Enhancement: Change of Icons in Printable view Display
Description: Updated the Manual, Automatic, Rejected, Warning & Appealed icons in Printable view to save the real estate of printing.
Tracking Code: TC-34736

Enhancement: Invoice Review - High Complexity - Creation of JSP Pages - Printable View
Description: Introduced a pop-up/modal in the Printable View button to view the printable render page which displays the selected blocks of the slick line items that appear in the printable view render a page.
Tracking Code: TC-34325

Enhancement: Invoice Review - High Complexity - Display Table - Printable view
Description: The following line items are displayed in the table format based on search parameters:

- Project column is displayed in the subline section above Description.
- Removed Has Adjustment column.
- Up to 200-line items are displayed, and all line items as part of Parity.
- In search results, the system displays only filtered field results of Printable View. Custom fields are not displayed.
- Displays of filtered results in the form of standard columns only.

Tracking Code: TC-34364

Enhancement: Appealed Invoice Text
Description: Introduced APPEALED text label in the grid to display the appealed line items above the description.
Tracking Code: TC-33623

Enhancement: Invoice Review - High Complexity - Adjustment History
Description: Modified and updated the invoice by reproducing the inline adjustment history to the grid. The comments section is placed to the right side. Introduced Revert functionality in the invoice and is available in the workflow.
Tracking Code: TC-32190

Enhancement: Invoice Review - High Complexity - Reject Line Items
Description: The following changes are implemented to improve the Reject Line Items:

1. Introduced the Reject Line Item button to the new invoice review.
2. If no line items are checked or already rejected, then the system greys out the Reject line item button.
3. The reject line item button is "available" in the following scenarios:
    a. When one or more line items are selected or
    b. When one or more line items are selected (with a mix of rejected and unrejected).
4. When the user clicks on the reject button, if the line item has a mix of rejected and unrejected then the unrejected item is rejected and the already rejected line item is "skipped".

Tracking Code: TC-33047

Enhancement: Remove Pagination Bar
Description: Modified the grid by removing the bottom grid row where the pagination buttons, count of selected lines, total lines, and the lightbulb button is located. The total number of rows are displayed at the bottom of the grid.
Tracking Code: TC-33564

Enhancement: Counts Above Grid
Description: Modified the counts' grid of the line items. The counts' grid is available at the left top of the grid. The following text labels and row count data values are added at the top of the grid:

- line items
- selected
- warnings
- reviewed

These values are updated based on the active filters. When the filters are removed, all 4 count values revert to the previous stage.
The following are the scenarios in which counts are available on the grid:

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- Line items with Multiple warnings – Displays the posted invoice. Individual warnings are not considered.
- Displays when an Invoice is moved to the next stage of the approval process - Reviewed numbers apply to current users only.
- Nothing to be displayed to the non-workflow users.
- In edit mode, the number of line items, the number of selected line items, and warnings are displayed.
- When a filter is applied, values on the top of the grid dynamically change as per the applied relevant Filters.

Tracking Code: TC-33811

Enhancement: Clear Description Filter Text Button
Description:

1. Added the X button next to the magnifying glass. The button is greyed out when there is no text entered by the user in the search field.
2. The X button changes its state if a single character is entered in the search field.
3. When the X button is clicked, both the text box and the filter on the grid is clear.

Tracking Code: TC-33566

Enhancement: New Revert Button Modal and Functionality for Adjustment History
Description: In adjustment history, the selected adjusted line item(s) are reverted to the previous state when a line item is Reverted. The Revert button is available to the invoices that are present in the workflow.
Tracking Code: TC-34145

Enhancement: Add "Rejected" choice to Has Adjustments filter
Description: The following changes are implemented to improvise the adjustments column:

- Added Rejected to the drop-down list.
- The 'Rejected' Line items are displayed when the other filter selection as All or Any.
- 'Both' icon are renamed to Auto & Manual.
- Display the rows that currently have status as Rejected when the filter is selected as ‘Rejected’ in the Adjustments section.
- Drop down List is as follows:
    - All Line Items (changed from All)
    - All Adjustments (changed from Any)
    - No Adjustments
    - Manual
    - Auto
    - Auto & Manual
    - Rejected

Tracking Code: TC-34258

Enhancement: Add Large Invoice Warning Text

Description: Introduced a feature to display a warning message, “Warning: This invoice has more than 1000-line items, and it might take longer to load and process” when the number of line items (N) equals or exceeds 1000 at the top of the invoice page.

In the following scenarios, the system displays the warning message as and when applicable:

- When the number of line items (N) is 999 and adds one line item.
- Whenever (N > = 1000) by adding new line items.
- The warning message is not displayed when the user deletes a line item reaching (N) to 1000.
- Whenever (N < 1000) by deleting new line items.
- Edit/View/Post mode (In Workflow & out of Workflow) - Display of warning is applicable.
- Display of warning is not applicable when the line items are Filtered.
- Warning Message needs to be part of the localization file and should not be hardcoded.
- Display of notifications to be in line with existing TC functionality.

Tracking Code: TC-33569

Enhancement: [EAB] Matter Budget Insight - 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-34626

Enhancement: Escalate Flag - Add Flag Column

Description: Introduced a new column with the title as Flag that contains an interactive flag icon that is displayed in the interactive grid with the following color options:

1. White with a gray outline
2. All red
3. All gray

The column is provided with sort capabilities as follows:

- sorting all line items with a flag to the top on the first click,
- by line item number descending.
- Then by all line items without a flag in line item number descending.

This column has the following filter capabilities:

- Flagged (Red)
- Flagged (Gray)
- Flagged (Either Gray or Red)
- No Flag (White)

Tracking Code: TC-32758

Enhancement: Escalate Flag UI for Slim down Version

Description: Introduced new column Flag to be displayed in the interactive grid with the following color options:

- Red - Actively Flagged
- Grey - Resolved / Formerly flagged
- White - Default state

Tracking Code: TC-35071

Enhancement: Slim down version of Escalate Flag - Transition of Flag Status
Description: By default, the Flag is in White. Users can add a flag to the line items and can change the status of the flag color with subsequent clicks.
Tracking Code: TC-35144

Enhancement: Revert - Redesign of Adjustment History in Subline
Description: Redesigned the Adjustment History in the Subline with the following changes:

- Removed checkboxes next to adjustment history items.
- Grouped adjustment history items in the following order
  - Rate
  - Quantity
  - Discount
- For each group, sort the adjustment history items from oldest to newest vertically
- On clicking the revert button, a new popup appears as per the action performed by the user.
- When the users revert, the system updates the list of adjustment history items by entering a strikethrough of the history items reverted
- Added a new record indicating the reversion changes to the Original value in the same format as the others.

Tracking Code: TC-34968

Enhancement: Invoice Review - High Complexity - Bulk Adjust Line Items
Description: The Bulk adjustment feature is enabled via Setup in Object Definitions, Invoice, Line Items. It appears as an option in legacy line items block Edit Mode screen if either "Bulk" or "Bulk/Inline" is selected as the Adjustment Method.
Enabled the Bulk Adjustment button inside the Interactive Line Items block, which is independent of Setup configuration.
The text and checkbox next to "Maintain Selection After Adjustment” is hidden.
Bulk Adjust Modal drop-down list consists of "Rate / Units / Amount"

- The button is located at the right of the Reject button
- The button is visible only when the invoice is in workflow
- The button is invisible in View & Edit mode
- Post approval of the Invoice, bulk adjust is not visible
- The button is grayed out unless >1 line item checkboxes are actively selected
- When clicked, the button displays the legacy Bulk Adjustment modal that is available in the Edit Mode screen

- After a user enters Bulk Adjustment modal options and data and clicks OK, the corresponding adjustments are made to those line items in the grid immediately after.

Tracking Code: TC-32032

Enhancement: Revert Functionality - Hide "Revert" Button
Description: The Revert button is hidden in the subline when Rate / Quantity / Discount is the same as the Original Rate / Quantity / Discount.
Tracking Code: TC-35808

Enhancement: Change Comments to Requestor to "Comments to Vendor"
Description: Renamed the title Comments to Requestor to Comments to Vendor in the following places:

- In line adjustment
- Adjustment
- Bulk adjustment
- Revert

Tracking Code: TC-35466

Enhancement: Enhancements to Counts above grid
Description: Displays the counts of the filtered items in the Interactive line items grid when the filter applies to the columns, as shown below:

- Filtered line items / No of line items
- Ex: 53 / 162

Tracking Code: TC-35050

Enhancement: Update work filters tabs
Description: Replaced Work Status Filter buttons with tabs and Work Status Filter is left aligned.
Tracking Code: TC-35056

Enhancement: Update "Adjusted" Header Titles in Interactive Grid & Printable View
Description: The following Header titles are modified/updated in Interactive Grid & Printable view Panel:

- Adjusted Rate -> Rate
- Adjusted Quantity -> Quantity
- Adjusted Discount -> Discount
- Adjusted Total -> Total

Tracking Code: TC-35064

Enhancement: Font style consistency in the invoice review page
Description: The font styles are updated in the invoice review page for the following places:

- The "Work Status Filter:" title
- The widget's title
- All the text inside the grid

Tracking Code: TC-35145

Enhancement: Enhancing color adjustments to Interactive line item grid
Description: Following UI changes are implemented to the cells and bars background and borders in the Interactive line item grid:

- Background and border color of the counts bar
- Background and border color of the column title cells
- Background and border color of the column filter cells
- Background and border color of the line item cells
- Background and border color of the subline
- Background and border color dark bottommost cells

Tracking Code: TC-35059

Enhancement: Update Default and Optional Columns
Description: The following changes are implemented in column configuration in the grid:

- The below Default columns are changed to Optional Columns:
  - Original Rate
  - Original Quantity
  - Original Discount
  - Original Total
- The below Optional Columns are changed to Default columns:
  - Rate
  - Quantity
  - Discount

Tracking Code: TC-34970

Enhancement: Update Default and Optional Columns in the Column Configuration Menu
Description: Column configuration menu is displayed as per new order in the grid as shown below:
Default Columns

- Reviewed
- Date
- Item Type
- Has Adjustments
- Category
- Activity
- Timekeeper
- Rate
- Quantity
- Discount
- Total

Optional Columns

- Original Rate
- Original Quantity
- Original Discount
- Original Total
- Adjustment Total
- Has Warnings
- Project
- Taxable

Tracking Code: TC-34971

Enhancement: Bulk adjust Enhancement - Grey out OK button in Adjustment Modal
Description: The following changes are implemented in Bulk adjust enhancement:

- The button OK appears as grey when the fields are empty.
- Displays the note message All fields are mandatory to fill on the top.

Tracking Code: TC-35852

Enhancement: Shade Adjusted Cells
Description: The cell background is shaded in the following conditions:

- Cell background is shaded if there is a difference in the adjusted value of rate, quantity or total with the original counterpart for each row.
- No change in cell background, if the values are the same (no adjustments have been made to this row).

Tracking Code: TC-33567

Enhancement: Update Column widths
Description: Updated the column widths of the Interactive grid.
The width of the following default columns are fixed:

1. Checkbox
2. Item
3. Flag
4. Reviewed
5. Date
6. Item type

The following columns are displayed by default and have the default width when the grid loads, whenever the "Reset Columns" button is clicked:

1. Has Adjustments
2. Category
3. Activity
4. Timekeeper
5. Rate
6. Quantity
7. Discount

8. Total

When one or more optional column(s) is added to the grid using the column configuration list, the width of all the columns are adjusted automatically to accommodate the new column(s).
Tracking Code: TC-35057

Enhancement: Update buttons above the Grid
Description: Updated the aesthetic look for the following buttons:

- Mark Reviewed (When in workflow)
- Mark Unreviewed (When in workflow)
- Clear Filters
- Reject (When in workflow)
- Bulk Adjust (When in workflow)

Increase the height of the Description & warning search bar to the height of the buttons.
Tracking Code: TC-35055

Enhancement: Date Column Values and Width Story
Description: Display the date as per the local default time format in the date column in fixed width.
Tracking Code: TC-35058

4 Resolved Issues

The following items have been resolved in the TeamConnect Enterprise® 6.3 release. Each issue is documented in the following format:

- A description of the issue
- Internal tracking code
- Case number, if applicable

Issue: Searching by Employee ID in the Contacts Global Search not returning any results
Tracking Code: SUPPORTPRI-55967
Case Number: 2020-0720-625643

The following issues have been addressed in patches to 6.2 versions of TeamConnect and are also included in this update:

Issue: Invoice Summary Level adjustment method making adjustment on rejected lineitem and throwing the error
Tracking Code: SUPPORTPRI-56717
Case Number: 2020-0821-632648
Initial Fix Version: TCE 6.2.1 Patch 23

Issue: Dates in a generated document are one day behind corresponding dates in the contact card
Tracking Code: SUPPORTPRI-56712
Case Number: 2020-0818-631786
Initial Fix Version: TCE 6.2.4 Patch 3

Issue: Error encountered with if@ using List custom field
Tracking Code: SUPPORTPRI-56624
Case Number: 2020-0908-636004
Initial Fix Version: TCE 6.2.1 Patch 22

Issue: Updating any of the field triggers false update on Multi-Value list field
Tracking Code: SUPPORTPRI-56721
Case Number: 2020-0915-637582
Initial Fix Version: TCE 6.2.1 Patch 23

Issue: Map to User Input Text Entry is not recognizing the user-inputted Line breaks
Tracking Code: SUPPORTPRI-56985
Case Number: 2020-0720-625536
Initial Fix Version: TCE 6.2.4 Patch 3

Issue: Invoice decimal rounding inconsistent in summary values
Tracking Code: SUPPORTPRI-56886
Case Number: 2020-1013-687803
Initial Fix Version: TCE 6.2.1 Patch 25

Issue: System error accessing In-progress and Attention required tab in Workflow process when Document deletion approval Rule is active
Tracking Code: SUPPORTPRI-57114
Case Number: 2020-1002-684408
Initial Fix Version: TCE 6.2.4 Patch 5

Issue: User appointment status is changing incorrectly on sync with calendar
Tracking Code: SUPPORTPRI-57602
Case Number: N/A
Initial Fix Version: TCE 6.2.2 Patch 8

Issue: EazyDocs mapping ActiveAssigneeList and AssigneeList generate bad xml
Tracking Code: SUPPORTPRI-55624
Case Number: 2020-0629-621943
Initial Fix Version: TCE 6.2.2 Patch 4, TCE 6.2.1 Patch 19, 22

5 Known Issues

The following items are known issues in the TeamConnect Enterprise® 6.2.5 release. Each issue is documented in the following format:

- A description of the issue
- Internal tracking code

Issue:
Description:
Workaround:
Tracking Code:

Issue: Native Reporting - Grand total displays incorrect record count
Description: In report, the grand total displays more record count than the actual record count.
Tracking Code: TC-36428

Issue: Native reports throwing error when group by on Right data set.
Tracking Code: TC-36270

Issue: Native - Filters (Assignee status and first name) applied are ineffective in reports created with Transaction data series
Tracking code: TC-36440

TC-33909: Need additional "All" filter for Adjustments Filter
Issue: Currently, the "Any" filter selection shows all rows whether there is an adjustment or not.
We need to fix this to show any line item that has either an AUTO or MANUAL adjustment.
Then we need to add an "All" filter that will display all line items, regardless of the presence of adjustment on them.
We need to update the adjustment icons as per the mock attached (MANUAL, AUTO, MANUAL+AUTO).
Hyperlink for the Manual & Auto is to be removed.
Description: The issue has been fixed by introducing an “ALL” filter that displays all the line items, regardless of the presence of adjustment. Updated the adjustment (MANUAL, AUTO, MANUAL+AUTO) icons and removed the hyperlinks to the icons.
Tracking Code: TC-33909

Issue: Slickgrid is not loading adjustment history when line item is not in grid focus.
Description: This issue has been fixed by loading the data irrespective of the line items present in the grid or scrolled above.
Tracking Code: TC-34278

Issue: Reverted adjustments not striking through in Printable View
Description: This issue has been fixed by striking the Reverted adjustments in Printable View.
Tracking Code: TC-35152

Issue: When Comments to Vendor is made mandatory from the Admin Settings and the Comments to Vendor is not filled in the Bulk Adjust then the Bulk Adjust is not working.

Description: Bulk Adjustment feature is not working when the **Comments to Vendor** field is unfilled in modal, though the **Comments to Vendor** field is configured as mandatory in Admin Settings.
Tracking Code: TC-36565