

This document details the upgrade information, new features, resolved issues, and known issues that are included in TeamConnect Enterprise® 6.3.3

1 System Requirements

Before you begin to install TeamConnect 6.3.3, 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 6.3.3

- 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 6.2.6)
- TeamConnect 6.3 (through 6.3.2)

TeamConnect 6.3.3 is designed to pair with the following versions of modules (notes below reflect the available versions as of the TeamConnect 6.3.3 release date):

- AP Link 5.1
- CSM 6.3.1
- Data Warehouse 6.3
- Financial Management 6.3.1
- Legal Matter Management 5.0.1 Patches 1-6
- Office Suite 3.2.1.7
- Screen Designer 5.2.1
- Service of Process (SOP) Manager 5.1.1 Patches 1-6

2 Upgrade Considerations

Third Party Changes - Effective with the 6.3 release

- 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 Log4j Vulnerability

- Removed all references to Log4j 2.x
- Upgraded Log4j 1.x to use Reload 4j

NOTE - Any earlier Patches will be overwritten when swapping the war

Tracking Code: SOH-3684
Case Number: 2022-0201-886400

4 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:

The following new features have been released in the TeamConnect Enterprise® 6.3.3. Each feature is documented in the following format:

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

Issue: Enhancement to upload large document files.

Description: To avoid file/document crash while uploading, implemented the following changes in the Document settings:

- i) MAXIMUM SIZE OF UPLOAD FILE (MB) - 1050
- ii) MINIMUM STREAMING UPLOAD SIZE (MB) - 25
- iii) MAX DESIGN ARTIFACT (MB) - 1050

Tracking Code: SUPPORTPRI-59373

Issue: Enhancement required for system reply address (Notifications).

Description: To avoid conflict behavior of email notifications, introduced new system settings for email settings in TeamConnect as below:

- USE SYSTEM REPLY INSTEAD OF GENERATING USER
- SET DISPLAY NAME ON GENERATED EMAILS

As per the below combination values, the “From” address generates.

Use System Reply	Use Display Name	Result
YES	YES	Appends reply-to-address to “TeamConnect” ex: “TeamConnect <no-reply@email.com>”
NO	YES	It will return from address in the form of “first/last name (TeamConnect) reply-to address” ex: “John Doe (TeamConnect) john.doe@email.com”
YES	NO	returns reply-to-address ex: “no-reply@email.com”
NO	NO	returns generating user email address if it's present or else returns reply-to address ex: john.doe@email.com or no-reply@email.com

Tracking Code: SUPPORTPRI-60566

Issue: Invoices > If there are separate accounts to track Invoice Line Items and NON US Taxes, invoices with NON US Taxes at Line Item Level fail to post.

Description: The invoice is posted successfully when a new Invoice with NON-US Tax of type 'Line Item Level' is tied to the matter vendor. In the account section, separate accounts for the line item task and corresponding non-us line taxes have been created after successfully posting the invoice.

Tracking Code: TC-39152

Global Search Enhancements

We have simplified the Global Search experience to take the guesswork out of getting the expected result and make it clearer why a search result was relevant by:

- Making it easier to search for a specific Matter ID.
- Highlighting matches in the search results so the user understands why a record is relevant.
- Helping a user understand why the record they searched for could not be found by surfacing errors in the indexing both in the UI and in the Global Search Index Tool.
- Enabling clients to set the index limit to allow for more than 1000 fields to index.

New and Updated User Guides to deep dive into these changes:

[Indexing Errors](#)

[How to Search for Matter ID \(Enabling Exact Matches\)](#)

[Search Results Highlighting](#)

[How Indexing Works](#)

[Global Search Index Tool \(TCE 6.3.3\)](#)

Enhancement: Surface index errors/failures in the Global Search Index Tool and send a notification to a list of emails when an index fails.

Description: If an Object(s) fails to index, the message “Index Failed” will appear in the Status column of the Global Search Index Tool. In addition, a notification will go out to a list of emails identified in Admin Settings/Search Results to notify users of the failure and enable them to take action. Please see the user guide linked above for more details.

Tracking Code: TC-36415

Enhancement: Find a specific matter ID without using quotes

Description: There is a new filtering option in Global Search results. If your TeamConnect Admin turns on the setting “Focus Exact Matches in Search Results”, it will enable users to search without quotes around their matter ID and display the Exact matches at the top of the results. Sometimes Exact matches can be found beyond the first page so it is best practice to

then apply the “Show Exact Matches Only” filter to ensure that you see all the matching results. Please see the user guide linked above for more details.

Tracking Code: TC-36636

Enhancement: Highlight matches in the Global Search results

Description: Global search results now highlight where the search hit in a record. If the field is not part of the global search results view, the field will be displayed “on the fly” in the results and highlighted. Please see the user guide linked above for more details.

Tracking Code: TC-36637

NOTE: We have discovered an issue with this new feature where any system field where a search hits will be displayed and highlighted in the search results. This may include protected fields like social security number (SSN). Because SSN is highly sensitive, it has been removed from highlighted results in TCE 6.3.5 Patch 8. Please consider an upgrade if you are concerned about this exposure.

Enhancement: Allow TeamConnect Administrators to set the index limit of fields per object

Description: The limit can be set between 1000-5000 and there is a new column in the Global Search Index Tool called Field Count which shows “# of fields/Field Count Limit”. If the limit is hit, the index will fail. Now, a message will appear in the Global Search Index Tool in the Status column that reads “Not Indexed. Field limit reached.” The limit can be adjusted and the index rerun successfully. Please see the user guide linked above for more details.

Tracking Codes: TC-36639 and TC-38279

5 Resolved Issues

The following items have been resolved in the TeamConnect Enterprise® 6.2.4 release. Each issue is documented in the following format:

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

Issue: When a user does not have access to view Invoice records, then the My Approvals page interactive grid is throwing an error in the console.

Description: This issue has been fixed to display the error message in banner and not in the widgets and grid, if the user does not have access to the object for Invoice object and Line Item object.

Tracking Code:TC-37351

Issue: Invoice Approvals page widgets are not getting resized.

Description: The resize issue of Invoice Approvals page widgets are fixed in the following browsers:

- Google Chrome (Version 90.0.4430.212)

- Firefox (Version 88.0.1)

Tracking Code:TC-38241

Issue: Legacy Reports: 'View Chart' button defaults to Flash player tool.

Tracking Code: SUPPORTPRI-58132

Case Number: 2020-1229-710181

Initial Fix Version: TCE 6.3.3

Issue: Copied template names are not showing properly.

Tracking Code: SUPPORTPRI-60089

Case Number: 2021-0212-733443

Initial Fix Version: TCE 6.3.3

Issue: Validation rule for creating documents doesn't work as expected.

Tracking Code: SUPPORTPRI-59461

Case Number: 2021-0225-738954

Initial Fix Version: TCE 6.3.3

Issue: Information is on the Database, but not showing in the UI

Tracking Code: SUPPORTPRI-59766

Case Number: 2018-0215-432606

Initial Fix Version: TCE 6.3.3

Issue: CURRENCY_EXCHANGE_RATE Column in the WH_INVOICE displays the exchange rate as 1 instead of the Correct Exchange Rates

Tracking Code: SUPPORTPRI-59656

Case Number: 2021-0331-762013

Initial Fix Version: TCE 6.3.3

Issue: Custom Search issue: Searching on multiple words in Matter name

Tracking Code: SUPPORTPRI-18101

Case Number: 2016-0510-249060

Initial Fix Version: TCE 6.3.3

Issue: TCE - Marking Appointments as 'Will Not Attend' for Other Users Remain on Users Outlook Calendar

Tracking Code: SUPPORTPRI-59896

Case Number: 2021-0422-771259

Initial Fix Version: TCE 6.3.3

6 Patches

The following patches have been merged into this update. Any patches released for any supported version of TeamConnect after this date will be merged into a future update:

TeamConnect Enterprise 5.2.11 Patch 1 which resolves the following issues:

Issue: Rules containing categories in qualifier are not working in all object definitions

Tracking Code: SUPPORTPRI-60119

Case Number: 2021-0518-781999

TeamConnect Enterprise 6.2.6 Patch 2 which resolves the following issues:

Issue: Capabilities Upgrade for Eclipse link

Tracking Code: SUPPORTPRI-59373

Case Number: NA

TeamConnect Enterprise 5.2.2 Patch 7 which resolves the following issues:

Issue: A couple custom fields in filter display of a custom search causing system error

Tracking Code: SUPPORTPRI-58962

Case Number: 2021-0112-719884

7 Known Issues

The following items are known issues in the TeamConnect Enterprise® 6.3.3 release. Each issue is documented in the following format:

- A description of the issue
- Internal tracking code

Issue: Missing error when Elasticsearch connection is broken

Description: If the connection between TeamConnect and Elasticsearch is broken and the user attempts a search, an error should pop up indicating there is a problem with Elasticsearch.

Workaround: The TeamConnect Administrator can visit the Global Search Index Tool to check if TeamConnect can successfully connect to Elasticsearch.

Tracking Code: TC-39068

Issue: Issue with add button in CSM settings->Firms

Workaround: In CSM settings->Firms when user select a view and operator as equal to and type the contact name, not able to add another field and search, instead if user clicks on search icon and select contact able to add a new field.

Tracking Code: SUPPORTPRI-61281

Issue: SQL Server>When Document Upload streaming is Enabled, there is an increase in

Memory usage

Description: Memory usage is not more than the size of the file uploaded but as streaming upload is set to yes and the file size is above the Max Design Artifact Size setting, there should be even less Memory usage.

Tracking Code: SUPPORTPRI-61285