

This document details the upgrade information, new features, resolved issues, and known issues that are included in TeamConnect Enterprise® 6.3.5

1 System Requirements

Before you begin to install TeamConnect 6.3.5, 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 6.3.5

- 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 6.3.5 is designed to pair with the following versions of modules (notes below reflect the available versions as of the TeamConnect 6.3.5 release date):

- AP Link 5.1
- CSM 6.3.5
- Data Warehouse 6.3
- Financial Management 6.3.1 Patches (PFM6301001)
- Legal Matter Management 5.0.1 Patches 1-6
- Office Suite 3.3.0
- Screen Designer 5.2.1
- Service of Process (SOP) Manager 5.1.1 Patches 1-6
- TC Essentials 6.3.1

2 Upgrade Considerations

Third Party Changes - Effective with the 6.3.5 release

- Business Objects is upgraded from BO 4.2SP8 to BO 4.2SP9. BO 4.2SP9 supports TCE 6.2.5 and above versions.
- Mitratech certifies Big Sur 11 (MacOs version) from TCE 6.3.5.

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:

The following new features have been released in the TeamConnect Enterprise® 6.3.5. Each feature is documented in the following format:

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

Interactive Grids for Search Views (of type Custom Search and Object Collection)

From this release, we are introducing Interactive grids for Search Views to delight the user experience in extracting and analyzing the data by providing the following values:

- New ways to interact with data
- Increased flexibility to search data and enhance the reporting capabilities
- Modernizing searches and views to produce simple to medium complexity data lists
- Optimize the time utilized in building reports

For more information, refer to the [Interactive Grids](#) for search views.

Enhancement: Enable Interactive grids

Description: Login to TeamConnect and navigate to Admin > Admin Settings > Search Results > Search Settings and Select/Unselect the checkbox to enable/disable the Interactive grids for Search views.

Additional Information: Interactive grids works for “Custom Search” and “Object Collection” search view types only.

Tracking Code: TC-37925

Enhancement: Allow admin to enable edit column for search views

Description: In the Setup window, when creating or updating a search view of type 'Custom search' or 'Object collections', the admin can select/unselect to enable/disable the edit column in the results display. Enabling this option might reduce the system performance. This option is available only if Interactive grids is enabled.

Additional Information: For Custom Search Search View, this option is available for selection on TeamConnect User Interface as well as in Setup window. For other Search Views, users can avail this option only in the Setup window.

Tracking Code: TC-38503, TC-38504

Enhancement: Export result display to pdf or excel

Description: any additional filters applied or customizations selected by the user on the interactive grids are included in the exported result.

Tracking Code: TC-37797

Enhancement: Retain record focus when navigating on custom search results and search views

Tracking Code: TC-37795

Enhancement: Localization support for date format

Description: Based on the locale selected, the date format changes without any change in language of date. The format of filter for date field changes based on the locale selected.

Additional Information: the date format for interactive grids will follow the edit mode date format for display and not the read-only mode date format.

Tracking Code: TC-40124, TC-40125

Enhancement: Enable Interactive grids to search views and custom search results for other objects

Description: Interactive grids is applicable for objects like Account, Project, Appointments, Contacts, Groups, History, Expense, Invoice, Task, Document, User.

Tracking Code: TC-38005, TC-38006, TC-38007

Improvement: Hover-over functionality

Description: Hover the mouse on the object link provides the details of the record in the text box.

Tracking Code: TC-37800

Improvement: Display record counts

Description: The no.of records displayed on the screen can be altered based on the value set for *Records Per Result Page* in *Admin > Search Results settings*.

Tracking Code: TC-37800

Improvement: Allow users to rearrange columns

Description: Users are allowed to drag and drop columns, and reorder as per their preference.

Additional Information: For saved searches and search views, the column rearrangement remains same as per user preferences even if the user switches between the tabs, or from session to session.

Tracking Code: TC-38281

Improvement: Allow user to show/hide column in results display

Tracking Code: TC-37805

Improvement: Allow user to reset columns back to default

Description: Newly added “Reset Columns” button and clicking on this removes the column sort, column reorder and show/hide column applied on the search results.

Tracking Code: TC-37805

Improvement: Allow user to clear filters for interactive grid

Description: Newly added “Clear All Filters” button and clicking on this removes all the filters applied on the search results.

Tracking Code: TC-37805

Improvement: Save user preferences for reordered columns, saved searches, unsaved searches and search views

Description: User preferences are displayed only if interactive grid is enabled or else users can see only display tables without any preferences.

Tracking Code: TC-39014, TC-37787

Improvement: Table Search on Interactive grids

Description: A Search bar is available for the users to filter the data at the table level with keywords or any characters (_ -.) or by entering any value. The matching keyword or character or the value will get highlighted.

Tracking Code: TC-38784, TC-39686

Improvement: Allow users to define aggregations on custom search

Description: Users are allowed to select formats like 'Sum' or 'Average' for numeric columns as part of the result display configuration. If we set format to "None" filter happens by string variables rather than numeric.

Additional Information: If you apply sums/averages to the table, they will only be calculated on the records returned in the search. (records returned will be based on the search limit set by the admin)

Tracking Code: TC-37793, TC-38786

○ INVOICE REVIEW

Enhancement: Changes & renaming few Default & Optional columns to Interactive Grid in My approvals

Description: The following changes are updated in My Approvals section:

- Renamed Invoice Total in USD to **Invoice Total (USD)**.
- Renamed Invoice Total name to **Invoice Total (Invoice currency)**.
- Invoice Total (USD), Invoice Total (Invoice Currency) and Currency columns are displayed in the column configuration panel.
- Renamed **No of line items & Days Pending Action**

Tracking Code: TC-37989

Enhancement: Widget for classification of invoices by cost (Pie Chart) - Display

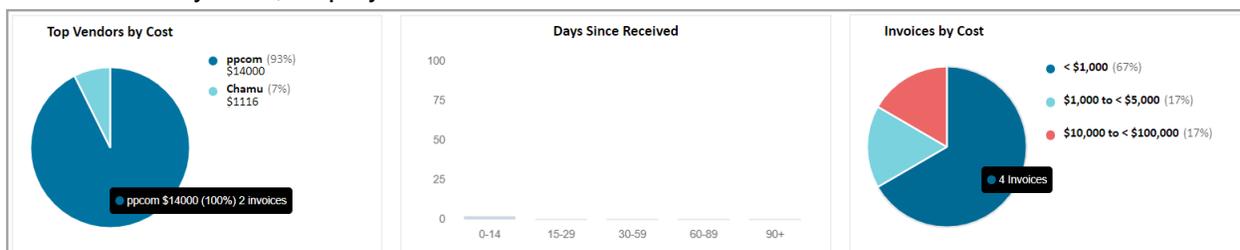
Description: Invoices by Cost data is displayed in the form of a pie chart. The values are classified based on the system currency. The system displays the values in system currency and the symbol to match system currency.

Tracking Code: TC-36646

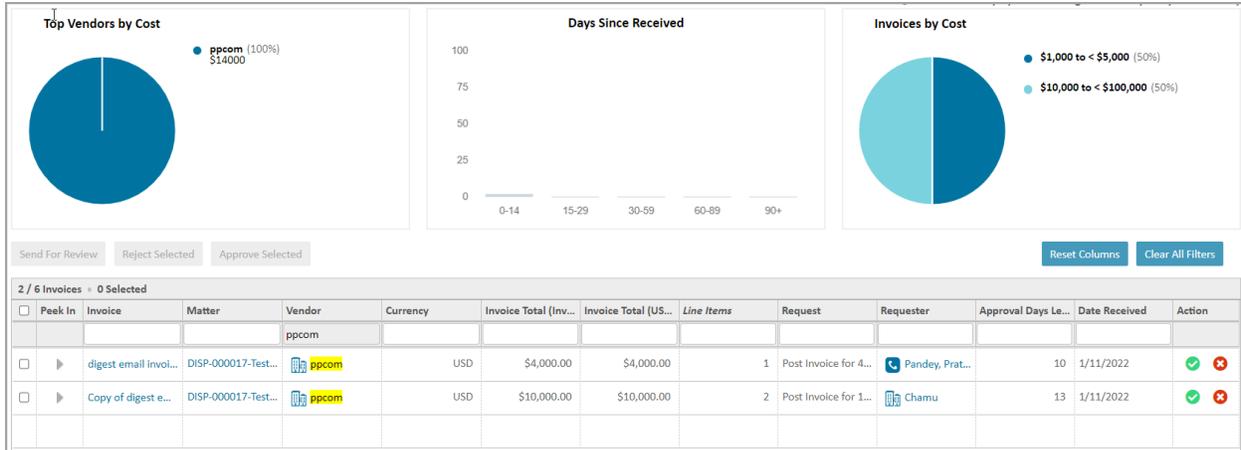
Enhancement: Widget for classification of Invoices by cost (Pie Chart) - Interactivity

Description: In the grid, all the three widgets are interactive filters. When a user hovers on a slice of Top Vendors By Cost/Invoice by Cost, the slice is highlighted and a tooltip displays the legend details.

For Invoices By Cost, displays the details Number of Invoices.



When clicked on a pie slice, the slice is highlighted and the grid is filtered by displaying only the selected slice invoices in terms of the Invoice Total (USD).

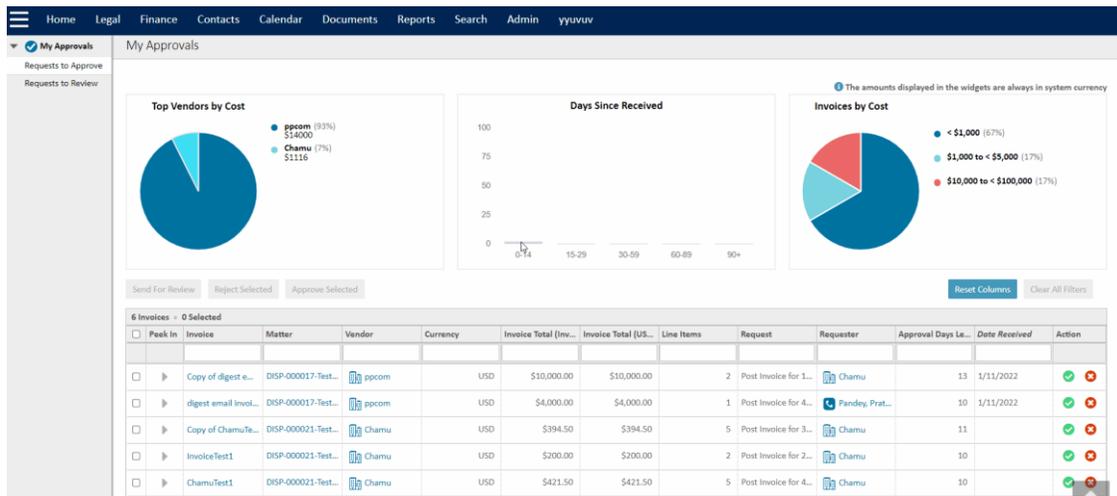


Additional Information: When the above-mentioned process is followed, the column Invoice Total (USD) should be locked with range or data being chosen by the user and should be cleared using clear filters.

Tracking Code: TC-36647

Enhancement: Days Since Received Widget - Interactivity based on Grid

Description: The data in this widget is interactive based on the days selected. When the user selects the specified date range, the system displays the data related to the selected date range in the widget and the in grid as well.



Tracking Code: TC-37987

Enhancement: Number range Filtering for Invoice Total (USD) - IR High Volume

Description: Introduced the parameters (Range & >=) for number range filtering to the Invoice Total (USD) column for Widget interactivity. Manual functionality is not supported

Tracking Code: TC-38013

Enhancement: Interactive Approvals - Due Date/Days Remaining Column

Description: **Approvals Days Left** column is displayed in My Approvals page based on the configuration. If an admin configures *SHOW DAYS REMAINING BEFORE APPROVAL EXPIRES INSTEAD OF DATE OF EXPIRATION* check-box in admin settings >> approvals tab, then the system displays the Approvals Days Left column in the My Approvals page. If the check-box is unselected, the system displays the **Due Date** column in the page. The Default sorting order remains the same.

Tracking Code: TC-36654

Enhancement: Display Data in Peek view

Description: In Peek Column, when the user clicks on the norgi or expand option, the system displays the line item data in the columns named Item, Flag, Date, Type, Category, Timekeeper, Original Total, Total, Warnings and Description.

The order of the data in the “Total” column is in descending order.

Peek In	Invoice	Matter	Vendor	Currency	Invoice Total (Inv...)	Invoice Total (US...)	Line Items	Request	Requester	Approval Days L...	Date Received	Action
<input type="checkbox"/>	digest email invo...	DISP-000017-Tes...	ppcom	USD	\$4,000.00	\$4,000.00	1 Post Invoice for 4...	Pandey, Prat...	10	1/11/2022	<input type="checkbox"/>	

Item	Flag	Date	Type	Category	Timekeeper	Original Total	Total	Warnings	Description
1	<input type="checkbox"/>	1/11/2022	Expense	E103 Word proces...	ppcom	\$4,000.00	\$4,000.00	--	--

Tracking Code: TC-38290

Enhancement: Permission Handling for Peek

Description: Introduced **Enable Interactive grid with Peek view for My Approvals**, check-box at *Admin > All Users > Select Member > Group Memberships > All Rights > System Rights > View > Invoice*. An admin has privileges to provide or remove access permission to view the Peek column in the Interactive grid to the users based on the group. On selecting/deselecting the checkbox, the system displays the Peek In column for a particular group.

Tracking Code: TC-38291

Enhancement: Grid Persistence - Action Column

Description: The grid updates and persists based on the scroll bar position without reloading the page after performing an Action in the Action *Admin > All Users > Select Member > Group Memberships > All Rights > System Rights > View > Invoice* column of the Invoices.

Tracking Code: TC-38287

Enhancement: Toggle Functionality - Switching from old Grid view to New Interactive grid view and vice versa

Description: Introduced a checkbox **Display Interactive Grid view** for toggle functionality at *Admin → Admin Settings → Approvals → Approval settings → Display Interactive Grid View For Invoices* checkbox.

The page displays the old grid view that is overridden with the new grid. By default, the checkbox is in an uncheck state.

Tracking Code: TC-38288

Enhancement: Display Adjustment History and View All option in Peek view

Description: The following changes are implemented in the Peek In Column:

- Whenever there is any change in adjusted total in the Adjusted Total Column, the system displays a hyperlink. On clicking the hyperlink, the users can view the Display Adjustment History modal.
- Display **View all** labels on the top (beside Top x / y line items) with a hyperlink taking the user to the respective invoice details page.

Tracking Code: TC-38301

Enhancement: Line Item Peek - Enhancements

Description: Following changes are implemented to include additional columns to display data in the Peek Column view:

- Display Line Item date.
- Display Time Keeper's name with hyperlink. When clicked on the name hyperlink, the user is redirected to the Contact page.
- Display the Date range (start & end date) of Invoice Line Items beside the View All hyperlink in Peek view. The date format is configurable at the backend.

Tracking Code: TC-38516

Enhancement: Grid Persistence - Send for Review

Description: The grid updates and persists based on the scroll bar position without reloading the page after performing an action **Send for Review** to the Invoices.

Tracking Code: TC-38517

Enhancement: Error Handling - Bulk Actions

Description: In accordance to TeamConnect standards, the displays a validation message, when the user performs bulk action to the invoices (Approve, Reject & Send for Review). A user needs to scroll to the top of the page to validate the notifications & error messages

Tracking Code: TC-38518

Enhancement: Style warning text for Request column

Description: The following changes are implemented in the Request Column:

- The color of the warning text "with warnings" is changed to red and applied to the cell content only.
- On hovering, the system displays a text with a warning.

Tracking Code: TC-38519

Enhancement: My Approval - Redesign default record option

Description: The following changes are implemented in the general **My Approvals** page, and not just for a specific record view:

- Renamed the **Default** drop-down to **Default Record**.
- Removed **Select** button from the Default Record drop-down to display the action upon clicking an item from the drop-down list.
- This is applicable irrespective of interactive grids and applies to all objects.
- Removed the filter logic dropdown field.

Tracking Code: TC-38779

Enhancement: update labels for peek in line items display

Description: The following changes are implemented in Peek In column to update the counts wording to reflect as below:

- Top X of Y Line Items by Total - Z with warnings (Z is the value for warnings to the total line items for that Invoice).
- The line items with NO warnings' (Z with warnings) are hidden.
- The **View All** button is moved next to the date range.

Tracking Code: TC-38763

Enhancement: My Approval - Redesign Search behavior for record dropdown

Description: The following changes are implemented for record dropdown:

- The **Search** button is hidden from the Record dropdown, and the action happens directly on selecting an item from the dropdown list.
- The changes are applied to the **My Approvals** general page and not just for a specific record view.

- Applies only if interactive grids are enabled.
- If the interactive grid is enabled and applies only to the Invoice object, remove the show/hide filter button.

Tracking Code: TC-38789

Enhancement: Digest email - Create the User preferences page for settings, and Persist the User preferences to Database (1st)

Description: Introduced support for users to enable, disable or modify settings for the My Approvals Email Digest functionality. For more information, refer to the [page](#).

Tracking Code: TC-38866

Enhancement: Digest email - activate hyperlinks on the email to redirect to filtered view in my approvals

Description: Provided hyperlinks in the Digest Email on My Approvals page. Refer to the [page](#).

Tracking Code: TC-39672

Enhancement: Digest email - display banner message on redirection from email if interactive grid is disabled

Description:

The following changes are implemented in Digest Email on My Approvals page:

- A warning message is displayed when a user redirects to the My Approvals section from digest email when the interactive grid is disabled. Display a banner message, “*You do not have the new interactive grid-enabled for the invoice approvals page. To view a filtered view of invoice approvals, please contact your system administrator to enable the new interactive grid.*”
- Users are redirected to the main My Approvals section with the same banner message if the user does not have access to the Invoices object or there are no invoices for approvals.

Tracking Code: TC-39674

Enhancement: WeekDay Checkbox ticked - To include emails sent on Sat & Sun, in Monday's Email.

Description: To send emails on weekdays in Digest Email, introduced a weekday checkbox. Refer to the [page](#).

Tracking Code: TC-39604

Enhancement: Column Configuration Saved in DB - High Complexity.

Description:

The following changes are implemented to improve Invoice Review High Complexity:

- Each specific TeamConnect user's Invoice Review High Complexity (Invoice Details Screen) column configuration details are saved to the database so that they are the same under all of the following circumstances:
 - Logging in to TeamConnect from different computers.
 - Using different browsers to log in to TeamConnect.
 - Clearing the local cache on a browser.
 - Also, the configuration details are no longer in the cache of the local browser.

Tracking Code: TC-39044

Enhancement: Custom Fields - Add "Interactive" Search Type.

Description: To view user preference columns in the Interactive grid through Interactive Search views, refer to the [page](#).

Tracking Code: TC-39059

Enhancement: UI Changes to Email Template.

Description: The following UI changes are implemented to improve the Email Template:

1. Updated the template Labels.
2. Color Code Pills for the "Invoice by Cost" section and made all pills larger in size.
3. Changed the Font and updated the spacing adjustments.
4. Removed the Non-Invoice Section from the Email Template, and the Invoice section moved to the center.
5. The email template is now a Responsive Layout.
6. The design is rendered the same way across all email clients - Gmail, Outlook, Yahoo, Apple Mail.
7. The subject text for the email is updated to "Pending invoices to approve in TeamConnect".
8. TeamConnect logo is added as text rather than an image; the styling of the text is similar to the other scheduled TC emails.

Tracking Code: TC-39587

Enhancement: Email Audit Logs for Email Digest.

Description: To store the status of the Digest Emails in the application, the following information is captured:

- **[Timestamp for job start] Digest email job started.**
- For Email recipient:
[Timestamp when digest email is sent] <Daily/Weekly> digest email of the invoice approvals for the user <usermane> <user email id>. Status - <Success/Failure/Skipped>
- **[Timestamp for job end] Digest email job ended.**

NOTE: Displays the status <Skipped> in the logs for those users who are subscribed to the digest emails, daily or weekly, but don't have any pending invoices for approval.

- To add the logging details as the last option in the list, introduced a new section for Digest Email (label TBD) in **Admin > Logging > Audit Log section** with the turn **ON** and **OFF** button. By default, the status is in the **OFF** position and can be turned ON by the Admin.
- Users with access to existing logs in Setup can access this information.
- The log information is written in the sent emails and not stored in the database.

Tracking Code: TC-39904

Enhancement: Don't send Email Digest if No. of Invoices in Users Approval is '0'.

Description: Email Digest is not sent to the user if there are 0 Total Invoices in the Approval list (i.e., 0 pending invoices in workflow for that user), though subscribed to Daily Email Digest. The status of the email is not displayed in the Audit Log.

Tracking Code: TC-39589

Enhancement: Filtering Columns in the Interactive Grid

Description: Provided ability for the user to filter columns in the Interactive Grid for type List, Multi list, and Boolean. The functionality of the filter applies in the Interactive grids.

Tracking Code: TC-40078/TC-40241

Enhancement: Sorting Columns in the Interactive Grid

Description: To filter the columns, introduce sorting options - ascending and descending, to the columns in the Interactive grid.

Tracking Code: TC-40077

Enhancement: Custom Fields - Load Interactive Grid based on Search View

Description: Implemented following changes to improve the Interactive grid column fields based on Search View, refer to the [page](#).

Tracking Code: TC-39233

Enhancement: Configuring Ranges of Email Digest Buckets in Admin & User Settings

Description: Implemented below changes to improve the Email digest:

- Provided ability for the Admin Users to configure range values specified Date Received, Total Cost, and Approval Days Left for the email digest.

- Validation input for integers only.

Below are the validation messages displayed in the email digest:

2. Displays an error message upon clicking Update, *“Please input only positive integer values in the upper and lower limit fields for the configuration of ranges in the email digest”*.
3. Display an error message for Date Received, *“Upper limit for Pending Invoices by Date Received range for the configuration of ranges in the email digest should not be less than the lower limit”*.
 - Displays an error message for empty validation, *“<field name> for Pending Invoices by Date Received range is required for the configuration of ranges in the email digest”*.
4. For Total Cost, displays an error message, *“Upper limit for Pending Invoices by Total Cost range for the configuration of ranges in the email digest should not be less than the lower limit”*.
 - Displays an error message for empty validation, *“<field name> for Pending Invoices by Total Cost range is required for the configuration of ranges in the email digest”*.
5. For Approval Days Left, displays an error message, *“Lower limit for Pending Invoices by Approval Days Left range for the configuration of ranges in the email digest should not be less than the upper limit”*.
 - Displays an error message for empty validation, *“<field name> for Pending Invoices by Approval Days Left range is required for the configuration of ranges in the email digest”*.
6. For the **Reset to Default**, reset the upper and limit of the ranges to the default value.
7. The digest email sent out to the users is updated (including the range displayed and the value sets) based on the specific ranges in the admin settings.
8. Displays the system currency code for Pending Invoices by Total Cost range (from admin settings).
9. Clicking on the **Reset to Default** link, the below default values display in the text boxes and displays the below error messages:

Breakpoints for Pending Invoices by **Date Received**

Upper Limit (Red) - 60 (Max = 730; Min = 0)

Lower Limit (Green) - 14 (Max = 730; Min = 0)

Displays an error message as, "*The lower/upper limit for Pending Invoice by Date Received for the configuration of ranges in the email digest cannot be greater than 730*".

Displays an error message, "*if the user inputs 0 in both Upper Limit and Lower Limit, The upper limit and lower limit for Pending Invoice by Date Received for the configuration of ranges in the email digest cannot be both 0*".

Breakpoints for Pending Invoices by **Total Cost**

Upper Limit (Red) - 10000

Lower Limit (Green) – 1000

Displays an error message if the user inputs 0 in both Upper Limit and Lower Limit, "*The upper limit and lower limit for Pending Invoice by Total Cost for the configuration of ranges in the email digest cannot be both 0*".

Breakpoints for Pending Invoices by **Approval Days Left**

Upper Limit (Red) - 7 (Max = 730; Min = 0)

Lower Limit (Green) - 14 (Max = 730; Min = 0)

Displays an error message, "*The lower/upper limit for Pending Invoice by Approval Days Left for the configuration of ranges in the email digest cannot be greater than 730*".

Displays an error message if the user inputs 0 in both Upper Limit and Lower Limit, "*The upper limit and lower limit for Pending Invoice by Approval Days Left for the configuration of ranges in the email digest cannot be both 0*".

User Preferences:

- The Show/Hide link is part of the Email Digest Checkbox. If the Email Digest checkbox is disabled, then this link is not visible on the page.

- When creating a user, the setting present at the Admin Level is the same settings set to the user.
- Clicking on the Reset to Default link the below default values are displayed in the text boxes:

Breakpoints for Pending Invoices by **Date Received**

Upper Limit (Red) – 60

Lower Limit (Green) – 14

Breakpoints for Pending Invoices by **Total Cost**

Upper Limit (Red) – 10000

Lower Limit (Green) – 1000

Breakpoints for Pending Invoices by **Approval Days Left**

Upper Limit (Red) – 7

Lower Limit (Green) - 14

f2f1 - Reset to Default Font Awesome Icon Code

- Use the settings Cog icon from within TeamConnect.

Tracking Code: TC-40074

Enhancement: Non-US Tax Type field to be displayed on the Interactive Grid

Description: Updated the Non-US Tax Type field with a dropdown list, and its values are set in the Non-US Tax Categories tab in setup at the invoice level.

- The tax application is set either at a Line Item level or the Invoice Summary Level that is inclusive for all Line Items.
- Display the selected value for the Non-US Tax type from the dropdown list for the Invoice in the Interactive Grid.
- Display the last category of tax in the column.
 - Ex. If the tax type is Fee > GST > SGST, only “SGST” is displayed in the Tax Type column.

Tracking Code: TC-40506

Enhancement: Formatting different columns in the Interactive grid. (Date, Number, Percentage, Currency, String)

Description: The below changes updated in the interactive grid:

- The updated date format is obtained from the Results Display section of the respective search view.
- Displays both date and time in the grid, then the format is selected as Data and Time.
- Either (Short/International etc.,) the Date format is based on the format set in the User Preferences or the existing Interactive grid only considers the 'Edit Mode' settings at the User Preference level.
- No pop-ups are displayed for custom fields.

Tracking Code: TC-40085

Enhancement: Custom fields - update widgets based on search view

Description: The below are the updated changes in the widgets based on the search view:

- Display the updated data in the three widgets based on the selected search view.
- By clicking on the widget, the table is filtered and locks the filter with current behavior.
- The characteristics and data within the widgets remain the same, even if the columns corresponding to the data for that widget are hidden in the Interactive Grid.

Tracking Code: TC-39675

Enhancement: Formatting different Columns in the IG. (Related Objects, Custom Objects, System fields)

Description:

- The editing popup is visible while formatting the columns, Rate, Units, and Total columns only.
- Displays a hyperlink for the Columns, having object reference or any Object Link on the Interactive grid.
- The user is navigated to the respective object when clicked on the hyperlink in the column.

Tracking Code: TC-40076

Enhancement: Show values in 'Sum' for system columns Rate, Total & Discount

Description: Introduced the field SUM in the Interactive Grid to display the sum of the values for the system columns (Rate, Total & Discount). By default, the grid displays all the sum values at

the bottom of the grid for the columns like **Original Quantity, Original Discount, Adjusted Total** (Net Total), **Total Adjustment** (Net Total - Original Total)

When filtered, the value of the Sum changes in the grid based on the records.

Tracking Code: TC-40641

Enhancement: Custom fields in Printable Views

Description: User has the ability to set the column order as per his preference in the interactive grid and the same column order set is displayed in the printable view. For more information, refer to the [page](#).

Tracking Code: TC-40029

Enhancement: Functionalities of All buttons above the Grid

Description: Updated the grid with the functionalities of the buttons like Mark Reviewed, Mark Unreviewed, Reject, Bulk Adjust, Reset Columns, Clear All Filters

Tracking Code: TC-40079

Enhancement: Persisting Interactive Grid Columns after loading them from the Search View.

Description: Due to multiple search views, the changes made by a User in Column configuration/ re-ordering stores in the DB per Search View.

Below are the changes implemented to the columns configured by a user/the System Admin changes the columns (Either Add/Delete) from the Search View, are displayed on the individual Users respective Interactive Grid:

- *If a Default Column is added to the Results Display on a Search View:* This change automatically reflects on the Users Interactive Grid & that Default column added to the view.
- *If a Default Column is removed from the Results Display on a Search View:* This change automatically reflects on the Users Interactive Grid and that Default column is removed from the view for all Users.
- *If a Default Column is marked as Optional in the Results Display on a Search View:* If the User has already added the column to the Interactive Grid, **No Changes** is made. If the User has not added any column to the Interactive Grid, displays the new column in the Column Picker as an Optional Column.
- In setup, if the order of the columns is changed in the Results Display, then The **Reset Columns** button is enabled in the UI.

Tracking Code: TC-40067

4 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 users don't have access to view Invoice records then My Approvals page interactive grid is throwing an error in the console.

Description: This issue has been resolved by displaying an error message in banner and hiding the div 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: This issue has been fixed in Google Chrome (Version 90.0.4430.212) and Firefox (Version 88.0.1).

Tracking Code:TC-38241

Issue: Email Digest to handle values if Upper Limit & Lower Limit values are the same.

Description: This issue has been resolved by making the Email Digest to handle the values, if Upper Limit & Lower Limit values are the same.

If both upper and lower limits are the same, let's say x, then the red section shows >x, yellows shows =x, and green shows <x.

Tracking Code:TC-40643

Issue: Some Columns are not displayed on the grid when we try to copy an existing search view.

Description: This issue has been resolved by making the display of 14 columns in the "All Line Items" search view.

Tracking Code:TC-40904

Issue: TC6.3.5 box integration file upload failing

Description: This issue has been resolved in the DMS file identifier and no error message is displayed when the user is trying to upload a TC6.3.5 box integration file.

Tracking Code: TC-40999

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 6.3.3 Patch 4 which resolves the following issues:

Issue: When a Normal User part of Limited Rights Group clicks on 'Approvals' in homepage an error "This Page isn't working" is displayed

Tracking Code: SUPPORTPRI-61838

Case Number: 2021-0817-819368

TeamConnect Enterprise 6.3.3 Patch 5 which resolves the following issues:

Issue: Error when Empty stop shows up in skipped Route workflow

Tracking Code: SUPPORTPRI-62423

Case Number: 2021-0810-816394

TeamConnect Enterprise 6.3.3 Patch 7 which resolves the following issues:

Issue: Application Slowness when clicking on the same document multiple times

Tracking Code: SUPPORTPRI-62599

Case Number: 2021-1214-869337

TeamConnect Enterprise 6.3.1 Patch 1 which resolves the following issues:

Issue: Changes to contact name is not updated properly in Involved Party records

Tracking Code: SUPPORTPRI-62282

Case Number: 2021-1004-839388

TeamConnect Enterprise 6.3.5 which resolves the following issues:

Issue: Cross-Site Scripting Issue with Document Url

Tracking Code: SUPPORTPRI-62455

TeamConnect Enterprise 6.2.7 Patch 3 which resolves the following issues:

Issue: Log4j2 JNDI vulnerability

Tracking Code: SUPPORTPRI-62516

TeamConnect Enterprise 6.2.6 which resolves the following issues:

Issue: 'Assignee' with a certain role as a searchable field under invoice is throwing an error

Tracking Code: SUPPORTPRI-60907

TeamConnect Enterprise 6.3.3 Patch 6 which resolves the following issues:

Issue: SSO User not able to update user preferences

Tracking Code: SUPPORTPRI-62508

5. Known Issues

The following items are known issues in the TeamConnect Enterprise® 6.3.5 release. Each issue is documented in the following format:

- A description of the issue
- Internal tracking code

Issue: Auto resize of column when user enters the date/value to perform the column filter

Tracking code: TC-38909

Issue: All the values in the dropdown field are not displaying when a dropdown field is filtered and then after reordering of columns

Tracking code: TC-39028

Issue: Column headers overflows while performing drag and drop of column

Tracking Code: TC-39084

Issue: After performing column filter/table search, open any one of the filtered results and then clicking on Next/Previous button navigates the user to all the records instead of filtered data.

Tracking Code: TC-39952

Issue: User is able to drag and drop the columns by clicking on Aggregation cell (present in footer row) in search results

Tracking Code: TC-39979

Issue: Pagination is displayed in printable view for all objects

Tracking Code: TC-41433

Issue: In Contacts Objects- Address book, only few records are displayed on page load even though we have more records

Workaround: Update the “Records per Page” value to the maximum (value > total number of records in address book) in the admin settings for all the records to be displayed.

Tracking Code: TC-41425

Issue: Navigating to any other tab/page and then back to the search displays the modify search screen instead of search results

Tracking Code: TC-39901

Issue: Missing 'Edit' column in the Result display of classic Grids

Workaround: Admin has to manually Check/Uncheck the edit column checkbox in the setup window to get it on TeamConnect user interface for search views of object collection type. (even though interactive grids is disabled for display tables)

Tracking Code: TC-41434

Issue: Missing 'Edit' column in the Custom Search result display.

Description: For Custom Search, the edit column will not be included in the search results on TeamConnect user interface (for display tables). This behavior doesn't change with respect to the admin configuration for CustomSearch search view for the 'Edit' column.

Tracking Code: TC-41439

Issue:

1) Clicking on the Clear All Filters button removes all the filters along with single and multi-sort applied on the table but multi-sort configuration in the Sort Columns window still displays.

2) Also, the sort sequence of the default sorted column will be reversed.

Tracking Code: TC-40394

Issue: Single sort is not working as expected after doing multisort.

Description: When single sort is performed on the column after multi sort, the data in the column is sorting only in ascending order.

Tracking Code: TC-40370

Issue: Support for Hindi for filtering on numeric & date column

Description: No data found error message is displayed if the user searches for Hindi numeral data in the column filter that is available in the interactive grids. This behavior is observed only for numeric and date fields.

Tracking Code: TC-40781

Issue: Exported PDF doesn't show the text in aggregation same as the table

Description: Unsupported locale text in the export PDF is not the same as shown in the table for few locales like Chinese (Taiwan)/Hindi.

Tracking Code: TC-40790

Issue: Drag column is getting sorted while performing a drag-drop in Firefox browser

Workaround: Perform the sorting again.

Tracking Code: TC-40858

Issue: When there are no records in the table after applying filters on select type, rearranging the columns doesn't retain selected filter (dropdown)

Workaround: Click Clear All Filters button

Tracking Code: TC-40949

Issue: Sort and Multi-sort not working for a specific locale i.e. South Korea

Tracking Code: TC-42043

Issue: Column sorting highlight is not displaying when you hide a Sorted Column > do a drag and Drop > show the Sorted column

Workaround: Click Reset Columns button and then perform the sorting.

Tracking Code: TC-40887

Issue: Performing filters via calendar field for different locale

Description: When we filter with any date (On, From- To) and click on any key, The selection was getting updated to present date. However, the filter records are not getting updated based on the present date.

Tracking Code: TC-40919

Issue: peek in columns are overlapping other invoice columns after filtering

Description: When a user expands the peekin column, the columns are overlapping other invoice columns after filtering is updated by adjusting the div in the code.

Tracking Code: TC-39083

Issue: Number/Currency Sorting on Budget Page Section is as per String Sorting

Description: Columns like Balance, Total Used, Total Allocated, Total Accruals are to be sorted as per Number Sort.

Tracking Code: TC-40934

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.

6 Patches

TeamConnect Enterprise 6.3.5 Patch 1 (PTC6350001) resolves the following issues:

Issue: Task/Expense codes are not deactivated after deselecting the checkboxes

Tracking code: SUPPORTPRI-62637

Case Number: 2021-0831-825630

Initial Fix Version: TCE 6.3.4 Patch 2

This patch will be merged into the TeamConnect Enterprise 6.3.6 update.

Issue: Documents larger than the maximum file size can be uploaded

Tracking code: SUPPORTPRI-62580

Case Number: 2021-1026-849994

Initial Fix Version: TCE 6.3.3 Patch 12

This patch will be merged into the TeamConnect Enterprise 6.3.6 update.

Issue: Embedded Objects does not show active child items if the parent item is deactivated

Tracking code: SUPPORTPRI-62512

Case Number: 2021-1118-860289

Initial Fix Version: TCE 6.2.5 Patch 7

This patch will be merged into the TeamConnect Enterprise 6.3.6 update.

Issue: TeamConnect - Appointments - Editing all-day appointment in a different time zone than it was created in creates a second all-day event

Tracking code: SUPPORTPRI-62724

Case Number: 2021-1215-870066

Initial Fix Version: TCE 6.3.5 Patch 1

This patch will be merged into the TeamConnect Enterprise 6.3.6 update.

Issue: Validation rule on contact to update detail not working

Tracking Code: SUPPORTPRI-62793

Case Number: 2021-1223-872816

Initial Fix Version: TCE 6.3.3 Patch 9

This patch will be merged into the TeamConnect Enterprise 6.3.6 update.

Issue: Logs filled with elastic search exceptions trying to get the Field Limit.

Tracking code: SUPPORTPRI-63113

Case Number: N/A

Initial Fix Version: TCE 6.3.3 Patch 12

This patch will be merged into the TeamConnect Enterprise 6.3.6 update.

TeamConnect Enterprise 6.3.5 Patch 2(PTC6350002) resolves the following issues:

Issue: Error in workflow when there is an empty stop without a user

Tracking code: SUPPORTPRI-62603

Case Number: 2021-1117-859784

Initial Fix Version: TCE 6.3.3 Patch 8

This patch will be merged into the TeamConnect Enterprise 6.3.6 update.

TeamConnect Enterprise 6.3.5 Patch 3(PTC6350003) resolves the following issues:

Issue: Global Search result is showing "Allow group Acl and Allow user Acl" in Results displayed

Tracking Code: SUPPORTPRI-62720

Case Number: 2021-0922-834695

Initial Fix Version: TCE 6.3.5 Patch 3

This patch will be merged into the TeamConnect Enterprise 6.3.6 update.

TeamConnect Enterprise 6.3.5 Patch 4(PTC6350004) resolves the following issues:

Issue: File with zero size is downloaded from available updates

Tracking Code: SUPPORTPRI-62470

Case Number: 2021-1001-838528

Initial Fix Version: TCE 6.2.8

This patch will be merged into the TeamConnect Enterprise 6.3.6 update.

TeamConnect Enterprise 6.3.5 Patch 5(PTC6350005) resolves the following issues:

Issue: Error Notification sent when Invoice Approval route has missing stops

Tracking code: SUPPORTPRI-63550

Case Number: 2022-0301-898511

Initial Fix Version: TCE 6.3.5

This patch will be merged into the TeamConnect Enterprise 6.3.5 update.

TeamConnect Enterprise 6.3.5 Patch 6 (PTC6350006) resolves the following issues:

Issue: Prevents leaking web service calls from the Outlook plugin

Tracking code: SUPPORTPRI-63813

Initial Fix Version: TCE 6.3.5

This patch will be merged into the TeamConnect Enterprise 6.3.7 update.

TeamConnect Enterprise 6.3.5 Patch 7 (PTC6350007) resolves the following issues:

Issue: Search Results are incorrect when searching for a Custom Date Field using the Between criteria.

Tracking code: SUPPORTPRI-63874

Case Number: 2021-0315-754242

Initial Fix Version: TCE 6.3.3 Patch17

Description: Passed Calendars to EclipseLink when searching, which caused it to use PreparedStatement.setTimestamp() when formatting the query, since our custom field columns are DATES we needed to pass java, sql Dates so EclipseLink uses PreparedStatement.setDate() instead.

This patch will be merged into the TeamConnect Enterprise 6.3.7 update.

TeamConnect Enterprise 6.3.5 Patch 8 (PTC6350008) resolves the following issues:

Issue: Global Search highlighting show social security number.

Tracking code: SUPPORTPRI-63821

Case Number: 2022-0425-920985

Initial Fix Version: TCE 6.3.5 Patch 8

This patch will be merged into the TeamConnect Enterprise 6.3.7 update.