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TeamConnect® Upgrade Toolkit 1.0 Upgrade 1

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User Guide

TeamConnect™ Upgrade Toolkit 1.0 Upgrade 1 User Guide

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NOTE: Throughout Mitratech product publications, in addition to using full product names where necessary, we also use familiar and shorter terms to increase your ease of reading. You may find the following aliases for our product names:

TeamConnect for TeamConnect Enterprise
Matter Management for TeamConnect Legal Matter Management
TeamConnect Legal for TeamConnect Legal Matter Management
CSM for TeamConnect Collaborati Spend Management
Collaborati Spend Management for TeamConnect Collaborati Spend Management
SOP or SOP Manager for TeamConnect SOP Manager
Legal Hold for TeamConnect Legal Hold
Legal Reports for TeamConnect Legal Reports
Deadlines for TeamConnect Deadlines
AP Link for TeamConnect AP Link
Office Suite for TeamConnect Office Suite
Financial Management for TeamConnect Financial Management
Screen Designer for TeamConnect Screen Designer
Upgrade Toolkit for TeamConnect Upgrade Toolkit

Acknowledgements

This product includes software developed by the following organizations:

Apache Software Foundation (<http://www.apache.org/>)

OpenSymphony Group (<http://www.opensymphony.com/>).

The license agreements for these and other supplemental software packages can be found in your installation media in subfolder Supplemental_Software_Licenses. That subfolder also contains Open Source Components.pdf, which lists the locations, license types, and specific versions of components that are available on the web.

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1 Upgrade Toolkit Help



Upgrade Toolkit Overview

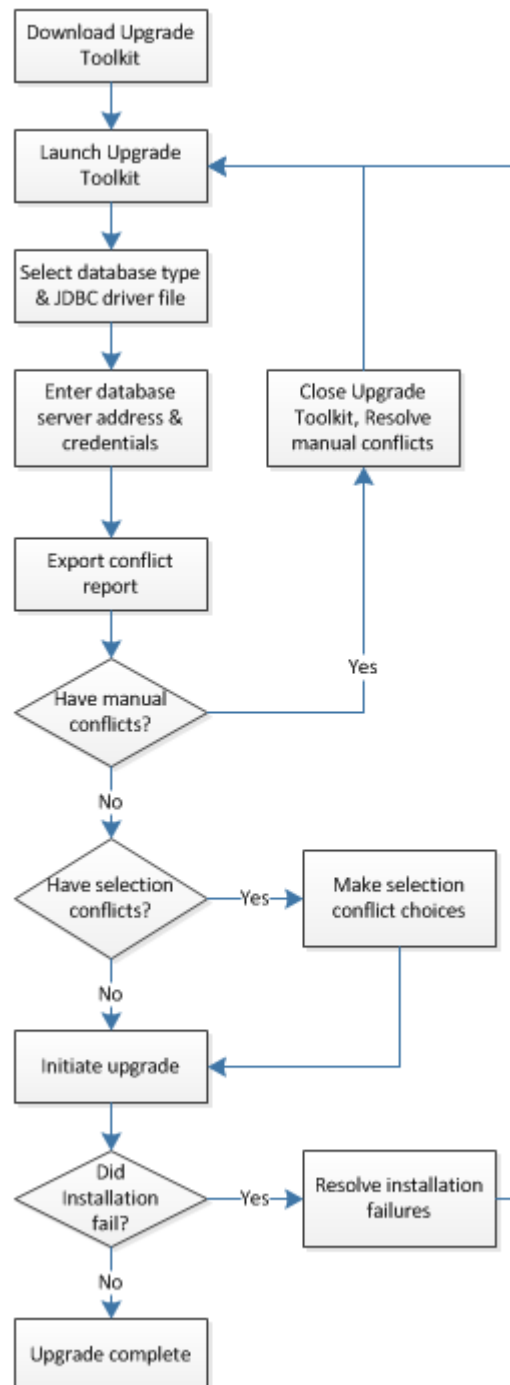
Welcome to the *TeamConnect® Upgrade Toolkit 1.0 User Help*.

This documentation is meant for people who need an overview of how to use TeamConnect Upgrade Toolkit. It describes the product requirements and the installation and setup process, as well as how to use the tool to upgrade TeamConnect modules.

The topics are organized by the major tasks that you must perform when setting up and using TeamConnect Upgrade Toolkit.

1.1 Getting Started

The following diagram illustrates the process of upgrading TeamConnect Legal Matter Management using Upgrade Toolkit.



Glossary

The following is a list of terms that are used throughout the *Upgrade Toolkit Help*.

- **Client instance**—The client's installation of TeamConnect.
- **Client modifications**—The changes that have been made to objects on the client instance.
- **Base Legal version**—The installed version of TeamConnect Legal, prior to upgrading. This could include client modifications.
- **Out of the box Legal version**—The unmodified version of the installed version of TeamConnect Legal, prior to upgrading.
- **Upgrade design**—The set of changes that must be made to upgrade from the starting version of TeamConnect Legal to the target version.
- **Conflict checking**—The process in Upgrade Toolkit that checks for differences between the client instance and the upgrade design.
- **Dependency**—The relationship between an object and another object that relies on the first to exist.
- **Upgrade conflict**—A conflict occurs when the client has made a modification to an object that differs from the modification that the TeamConnect Legal upgrade calls for. There are three categories of upgrade conflicts. See [Upgrade Conflicts](#) for more information.
 - **Manual conflict**—A conflict that must be resolved outside of Upgrade Toolkit before you can initiate the installation process.
 - **Automatic conflict**—A conflict that will be automatically handled by Upgrade Toolkit during the installation process.
 - **Selection conflict**—A conflict that can be resolved within Upgrade Toolkit, and requires the user's input on which action to take per each incidence of selection conflict.
 - **Upgrade Action**—The action to be taken by the TeamConnect Legal upgrade.
 - **Client Action**—The action that was previously taken on the object by the client.
 - **Conflict resolution**—The Upgrade Action and Client Action choices presented on the Conflict Resolution screen.
- **Conflict Report**—A file that can be exported and saved after the conflict checking process in Upgrade Toolkit that contains detailed information about all the discovered conflicts. See [Conflict Report](#) for more information.
- **Installation failure**—The error that occurs when Upgrade Toolkit cannot import the TeamConnect Legal upgrade design for one of various possible reasons. See [Installation Failures](#) for more information.

1.2 Upgrading with Upgrade Toolkit

The following section describes the general process for upgrading TeamConnect Legal Matter Management using Upgrade Toolkit.

Important: *All custom class files and custom screens need to be checked in before upgrading.*

To upgrade TeamConnect Legal Matter Management with Upgrade Toolkit

1. Launch the TeamConnect Legal Upgrade Toolkit **upgrade.exe** file, downloaded from the **About** page in TeamConnect Enterprise. See [To launch Upgrade Toolkit](#).
2. On the **Connect to Database - Introduction** screen, perform the following actions:
 - a. Select your TeamConnect instance's Database type between **Oracle** or **SQL Server**.
 - b. Click **Choose...** to locate the appropriate JDBC driver file for your instance's Database type.
 - If you do not have a JDBC driver file, please visit the [Oracle website](#) or the [Microsoft SQL Server website](#) to download one.
 - c. Click **Next**.
3. On the **Connect to Database - Oracle/SQL Server** screen, enter the following database information, then click **Next**:
 - **Username**: Your TeamConnect database's username.
 - **Password**: Your TeamConnect database's password.
 - **Database Name**: Your TeamConnect database's name (this field is only required for SQL Server databases).
 - **Database Server**: Your TeamConnect database's server address.
 - For Oracle databases, this address should contain the hostname, port number, and SID of your database, separated by colons.
 - For SQL databases, this address should contain the hostname and port number, separated by colons.
4. The **Conflict Checking - Version Information** screen displays the version information of your TeamConnect Enterprise and TeamConnect Legal installations. Click **Next**.
 - If your TeamConnect product versions are not supported by Upgrade Toolkit, you will be unable to proceed with the upgrade. See [System Requirements](#) in the *Upgrade Toolkit Release Notes* for a list of supported versions.
5. The **Conflict Checking - Summary** screen displays the discovered conflicts between your TeamConnect instance and the upgrade version. Click the **Export** button to save a detailed conflict report that contains further information on your conflicts, including instructions for how to resolve manual conflicts. See [Upgrade Conflicts](#) for more information on all types of conflicts, and [Conflict Reports](#) for more information on the exported file.
 - If you have any 'Manual' conflicts, you must resolve them outside of Upgrade Toolkit before you can proceed. You must restart Upgrade Toolkit after resolving these types of conflicts.
 - If you have only 'Automatic' conflicts or no conflicts of any type, clicking **Next** will take you to the **Ready for Install** screen.
 - If you have any 'Selection' conflicts, clicking **Next** will take you to the **Conflict Resolution** screen.

6. On the **Conflict Resolution** screen, make your selections from the available choices, then click **Next**.
 - The upgrade choices are located on the left side and are selected by default. Choices that retain the client changes are located on the right. See [Upgrade Conflicts](#) for more information on conflict selection.
 - If you have previously made conflict resolution selections and proceeded to the next screen, your selections will be restored when you return to this screen.
7. On the **Ready for Install** screen, click **Install** to initiate the installation.
8. If the installation succeeded, you will see the **Install Complete** screen. Click **Open Log** to view the DMT Import Log, a record of the changes made during the installation. Click **Done** to exit Upgrade Toolkit.
 - If the installation failed, you will instead see the **Install Failed** screen. Click **Open Log** to view the DMT Import Log, which includes a record of the errors that caused the installation to fail. Click **Done** to exit Upgrade Toolkit. See [Installation Failures](#) for more information.
9. After a successful installation, it is strongly recommended that you perform a full regression test on the upgraded instance to ensure that all features are functioning properly without issue.

1.2.1 Upgrade Conflicts

There are three types of conflicts that can occur during the upgrade:

- **Manual Conflicts**—These are conflicts that must be resolved outside of Upgrade Toolkit before you can initiate the installation process.
- **Automatic Conflicts**—These are conflicts that will be automatically handled by Upgrade Toolkit during the installation process.
- **Selection Conflicts**—These are conflicts that can be resolved within Upgrade Toolkit, and require the user's input on which action to take per each incidence of selection conflict.

Further details on each individual conflict can be found in the Conflict Report, which can be exported from the **Conflict Checking - Summary** screen.

Manual Conflicts

Manual conflicts cannot be resolved by Upgrade Toolkit, and must be dealt with either in the TeamConnect instance or directly in its database. There are two main methods for resolving these conflicts, described as follows.

- From within TeamConnect, make a copy of the affected object, then alter the dependent data so that it does not reference the original affected object and instead references the copy of the affected object. Then delete the original affected object.
- From within the instance's database, remove the dependency between the affected object and its dependent data for each affected object. In most cases, this will involve altering an attribute of the affected object. Take care to not edit the primary key of the affected object.

Important: For any manual conflict, only one of the previously described resolutions is necessary. Do not perform both resolutions on one conflict.

See [Manual Conflict Examples](#) for examples of manual conflicts and the steps required to resolve them.

Automatic Conflicts

These conflicts are automatically resolved by Upgrade Toolkit. The action that will be taken on each object is listed in the **Instructions** column of the Conflict Report. If you do not want the automatic conflict resolution to occur, you must exit Upgrade Toolkit before initiating the installation process and take action on the object from within TeamConnect.

The three types of Automatic Conflicts and their resolutions are described below.

- **Delete-Delete**—For this type of conflict, Upgrade Toolkit will leave the previously deleted object deleted.
- **Insert-Insert**—For this type of conflict, Upgrade Toolkit will automatically delete the existing object and insert the upgrade version of the object.
- **Delete-Update**—For this type of conflict, Upgrade Toolkit will automatically delete the existing updated object.

Note: There is one automatic conflict that always appears in upgrades from version TeamConnect Legal Matter Management 3.0 SP1, on the **{folder=System/Libraries, name=legal-legalutilities-library-3.0.0.0055.jar} Document**. This object is modified by the upgrade of TeamConnect Enterprise, and is not actually a conflict.

Selection Conflicts

There are two types of Selection Conflicts. In each case, you will be given the option of two different actions to take: the first option (Upgrade Action) is to accept the upgrade resolution, while the second option (Client Action) is to retain the current state of the object.

The two types of Selection Conflicts are described below.

- **Update-Delete**—This type of conflict occurs when objects were previously removed in the client instance, and the upgrade process calls for updating them.
 - **Note:** Update-Delete conflicts involving wizards, rules, or line item categories are automatically resolved. The reinsert option (Upgrade Action) is not available for these objects.
- **Update-Update**—This type of conflict occurs when objects were previously modified in the client instance, and the upgrade process calls for different modifications.



Important: It is recommended that you select the Upgrade Action on all finance objects and objects if you are planning on installing TeamConnect Financial Management.

Important: In certain situations, selecting the Client Action for objects that are dependent on other conflict resolutions can cause the installation to fail. The imported data will be rolled back and the instance will be returned to its original state. The Import Log contains information that will pinpoint the dependencies that caused the failure. You must change your selections for these dependencies to match each other for the installation to succeed.

1.2.1.1 Conflict Report

The Conflict Report is a file that can be exported and saved after the conflict checking process in Upgrade Toolkit. See step 5 in [To upgrade TeamConnect Legal Matter Management with Upgrade Toolkit](#) for more information on saving the Conflict Report during the upgrade process.

Below is a table containing descriptions of the columns in the Conflict Report.

  **Conflict Report Column Descriptions**

Column Name	Description
Resolution Type	The type of conflict. Manual, Automatic, or Selection.
Object	The TeamConnect object that contains the conflict.
Unique Attributes	The unique identifiers of the object with the conflict.
Parent Description	The root-level object of the conflicting object.
Upgrade Action	The action that will be taken by Upgrade Toolkit.
Client Action	The modification that was previously done by the client.
Instructions	<p>For Manual conflicts, this contains the data that is dependent on the conflicting object in the client's current database. For further information on how to resolve Manual conflicts, see the Upgrade Toolkit User Help.</p> <p>For Automatic conflicts, this contains the action that will be taken on the conflicting object.</p> <p>For Selection conflicts, this contains the options that are available to the user on the Conflict Resolution Screen.</p>

Upon opening the Conflict Report, the order of the listed conflicts does not initially match the order of the conflicts on the Conflict Resolution Screen in Upgrade Toolkit. If necessary, perform the following steps in Microsoft Excel so the listed conflicts match the order of the Conflict Resolution Screen.

To sort the Conflict Report to match the Conflict Resolution Screen

1. Select **Sort & Filter**, then **Custom Sort**.
2. Set the sorting criteria to the following: Column **A (Resolution Type)**, Sort On **Values**, Order **A to Z**.
3. Click **Add Level**. Set the sorting criteria to the following: Column **B (Object)**, Sort On **Values**, Order **A to Z**.
4. Click **Add Level**. Set the sorting criteria to the following: Column **E (Upgrade Action)**, Sort On **Values**, Order **Z to A**.
5. Click **Add Level**. Set the sorting criteria to the following: Column **F (Client Action)**, Sort On **Values**, Order **A to Z**.
6. Click **OK**.

1.2.2 Installation Failures

An installation failure occurs when Upgrade Toolkit cannot import the TeamConnect Legal upgrade design for one of various possible reasons.

The causes of installation failures must be resolved outside of Upgrade Toolkit, similar to manual conflicts. Because of the nature of installation failures, you may have to repeat this process if you encounter subsequent installation failures after resolving the ones you have encountered. The general process for proceeding past installation failures is as follows.

See [Installation Failure Examples](#) for examples of installation failures and the steps required to resolve them.

To resolve installation failures in Upgrade Toolkit

1. After an installation fails, open the most recent [DMT Import Log file](#). (See step 8 in [To upgrade TeamConnect Legal Matter Management with Upgrade Toolkit](#) for more information.)
2. Scroll to the bottom of the DMT Import Log. The last line(s) of the log file will contain information on the cause of the installation failure.
3. Determine the cause of the installation failure. These will commonly be of one of the following types:

- a. If you made conflict resolution choices on the two objects referenced in the DMT Import Log error message, you must review the resolution choices and ensure they are not incompatible. This would occur in cases where you select the upgrade action for one object and the client action for its related object.

An example of this type of conflict is choosing to reinsert the home page of a group (Upgrade Action), while also choosing to keep the removal of the group (Client Action) associated with the home page.

To resolve this type of conflict, take either the upgrade action for both conflicts, or take the client action for both conflicts.

- b. Of the two objects referenced in the DMT Import Log error message, only one or neither appears in the Conflict Report.

An example of this type of conflict is when the client has added a reference to an object that the upgrade is attempting to delete. For example, the client has added a rule which uses, as its action document, a custom class that is being deleted as part of the upgrade.

To resolve this type of conflict, create a copy of the object referenced and replace the reference with a reference to the copied object.

- c. Of the two objects referenced in the DMT Import Log error message, neither appears in the Conflict Report.

An example of this type of conflict is when history fields, which are part of the design, have been deleted by the client, and the upgrade package is inserting a history rule that depends on these fields.

To resolve this type of conflict, manually re-add the objects which the upgrade expects to exist. These objects will need to have unique attributes that match those specified in the unique attribute map in the import log.

- d. Invalid data in the instance to be upgraded can also cause installation failures. For example, having two tabs with the same names. These issues will need to be resolved if the import causes the data to be validated.

1.2.3 Log Files

There are three different types of log files that are generated when using Upgrade Toolkit. These log files contain detailed information on conflicts between your instance and the upgrade version, records of successes or failures during the import process, and more. Refer to these log files to help resolve [manual conflicts](#) and [installation failures](#).

All log files are located in the **TeamConnect** folder of the **Documents** folder of your computer (for example, C:\Users\username\Documents\TeamConnect\Legal Matter Management 4.0).

Types of Log Files

- The **Conflict Checking Log** is generated after the conflict checking process occurs. Specifically, it is generated when you are taken to the **Conflict Checking - Summary** screen in Upgrade Toolkit. It contains detailed information about the conflict checking process, and has a file name in the following format: **dmt - conflict checking_12_31_2014_15_10_55.log**.
- The **DMT Import Log** is generated after installation completes, whether successfully or unsuccessfully. Specifically, it is generated when you are taken to either the **Install Complete** or **Install Failed** screen in Upgrade Toolkit. You can open this file directly from either of the two screens by clicking the **Open Log** button. It contains detailed information about the import process, and has a file name in the following format: **dmt - import_12_31_2014_15_19_54.log**.
- The **Install Log** is generated after exiting Upgrade Toolkit. Specifically, it is generated after clicking the **Done** button on the **Install Complete** or **Install Failed** screens. It contains diagnostic information about the client machine's Java version, installation directories, and the upgrade process, and has a file name in the following format: **TeamConnect_Legal_Matter_Management_Install_12_31_2014_15_35_12.log**.

1.3 Examples

The following examples demonstrate how to resolve [manual conflicts](#) and [installation failures](#).

1.3.1 Manual Conflict Examples

Insert-Insert Manual Conflict Example #1

In this example, the client has inserted a Custom Lookup Table with the same Unique Code ('POTY') of a Custom Lookup Table that is being inserted as part of the TeamConnect Legal Matter Management upgrade process.

In the client instance, there exists a custom field, 'Category', in the Dispute object definition, that is using the POTY Custom Lookup table. In the database, the Category custom field references that lookup table through its unique code, POTY. This dependent data cannot exist without the presence of the Custom Lookup Table, yet if the Custom Lookup Table remains, the upgrade process will not be able to insert the new table.

Resolution Type	Object	Unique Attributes	Parent Description	Upgrade Action	Client Action	Instructions
Manual	Custom Lookup Table	{uniqueCode=POTY}	Custom Lookup Tables	insert	insert	[Client-inserted element needs to be copied and dependent data needs to be updated. Dependent data: {Custom Field in Category: DISP}.]

Conflict Report data for Manual Conflict Example #1

There are two different methods to resolve this conflict. You do not need to perform both resolutions, just one or the other.

How to resolve this conflict in TeamConnect:

1. As a user with setup rights, log in to the TeamConnect instance and open TeamConnect Setup.
2. Navigate to Lookup Tables > Custom.
3. Create a new Custom Lookup Table to take the place of the POTY table. This new table MUST have a unique code other than POTY.
4. After the new Custom Lookup Table is created, navigate to Dispute > Custom Fields.
5. Locate the Category custom field.
6. Edit the dependent data (the Category custom field) so that it references the newly created Custom Lookup Table (step 3).

How to resolve this conflict in the TeamConnect database:

1. In the TeamConnect database, locate the table that contains the conflict object (in this example, the Custom Lookup Table POTY).

2. Locate the line for the Custom Lookup Table POTY, then locate the cell that contains the unique code (POTY).
3. Directly in the table, alter the POTY cell and change the value to another unique four-character code. Commit the change.
 - Make sure to not alter the primary key value.

Insert-Insert Manual Conflict Example #2

In this example, the client has inserted a Currency Code with the same Unique Code ('NOK') of a Currency Code that is being inserted as part of the TeamConnect Legal Matter Management upgrade process.

In the client instance, there exists an invoice, 'Invoice-0001', that references the NOK Currency Code. In the database, the Invoice-0001 invoice record references the Currency Code through its unique code, NOK. This dependent data cannot exist without the presence of the Currency Code, yet if the Currency Code remains, the upgrade process will not be able to insert the new Currency Code.

Resolution Type	Object	Unique Attributes	Parent Description	Upgrade Action	Client Action	Instructions
Manual	Currency	{code=NOK}	the Multi-currency table	insert	insert	[Client-inserted object needs to be copied and dependent data needs to be updated. Dependent data: {Invoice-0001}.]

Conflict Report data for Manual Conflict Example #2

There are two different methods to resolve this conflict. You do not need to perform both resolutions, just one or the other.

How to resolve this conflict in TeamConnect:

1. Log in to the TeamConnect instance and locate invoice record Invoice-0001.
2. Edit Invoice-0001 so that it does not reference the affected Currency Code NOK.
3. Save the Invoice-0001 record.
4. As a user with setup rights, log in to the TeamConnect instance and open TeamConnect Setup.
5. Navigate to Lookup Tables > Multi-currency.
6. Create a new Currency Code with a unique three-character code that is not 'NOK'.
7. Set the Exchange Rate value of the new Currency Code to the Exchange Rate value of the NOK Currency Code.
8. Save the new Currency Code.
9. Delete the NOK Currency Code.
10. Close TeamConnect Setup.

11. In the TeamConnect instance, locate the invoice record Invoice-0001.
12. Edit Invoice-0001 so that it references the newly created Currency Code.

How to resolve this conflict in the TeamConnect database:

1. In the TeamConnect database, locate the table that contains the conflict object (in this example, the Currency Code NOK).
2. Locate the line for the Currency Code NOK, then locate the cell that contains the unique code (NOK).
3. Directly in the table, alter the NOK cell and change the value to another unique three-character code. Commit the change.
 - Make sure to not alter the primary key value.

1.3.2 Installation Failure Examples

Installation Failure Example #1

The first step in resolving any installation failure is to check the **DMT Import Log** file for error messages.

```
17 Jun 2014 17:15:04,149 ERROR - The design could not be imported because of the following errors:
17 Jun 2014 17:15:04,149 ERROR - The current design already contains a Rule with {uniqueKey=RequireMatterwhenMatterTypeSetOnCreate} in Object Definition INVC. Please use different values before retrying the import.
```

DMT Import Log error message for Installation Failure Example #1

The error message in the log states that there is already rule with the unique key RequireMatterwhenMatterTypeSetOnCreate. This means that the TeamConnect Legal Matter Management upgrade design wants to insert a rule with the same unique key, but was unable to due to another rule already existing with that unique key in the system. You've now located the object which is causing installation failure. The next step is to check to see if this object was shown as a conflict (if it had been modified or deleted in the client instance contrary to what the Legal upgrade calls for). Look in the Conflict Report for the object.

Resolution Type	Object	Unique Attributes	Parent Description	Upgrade Action	Client Action	Instructions
Automatic	Rule	{uniqueKey=RequireMatterwhenMatterTypeSetOnCreate}	Object Definition INVC	delete	update	[Remove artifact]

Conflict Report data for Installation Failure Example #1

Once you have located the object in the Conflict Report, check the Resolution Type. In this example, the conflict is an Automatic conflict. As such, there is only one resolution – the Upgrade Action resolution – which, in this case, calls for the RequireMatterwhenMatterTypeSetOnCreate rule to be deleted. Before the upgrade could insert the new rule, it had to delete the old rule but was unable to, because of data in the system that is dependent on the existence of the original rule.

To resolve this failure, locate the rule in the instance and check for any data that may be shared elsewhere. For example, rule qualifiers can be shared across rules. The client modified out of the box Legal rules to share qualifiers, which can cause installation failure if there are different upgrade resolutions for these rules. Once you have located the shared data on the rule, make a copy of the shared data and change the rule to reference the new copy of the data. This will allow

the RequireMatterwhenMatterTypeSetOnCreate rule to be deleted during the next run through Upgrade Toolkit.

Installation Failure Example #2

```
11 Jun 2014 14:58:27,021 INFO - Deleting TFDocument@25505456[ authorDate = Thu Jun 04 02:00:54 CDT 2009, checkedInOn = Thu Jun 04 02:00:54 CDT 2009, checkedOutOn = null, createdOn = Thu Jun 04 02:00:54 CDT 2009, modifiedOn = Thu Jun 04 02:00:54 CDT 2009, name = wzDBudgetASYS.class, primaryKey = 948, isEmailFolder = false, securityTypeID = 0, size = 962, typeIID = L, checkOutLocation = null, urlString = null, version = 1, versionText = null, treeKey = 1_11_15_310_313_316_948, contentID = 425, isApplyRightsToSubfolders = false, isApplyRightsToFiles = true,]
11 Jun 2014 14:58:27,361 ERROR - Cannot delete Document because it still has 8 Pages referencing it
```

DMT Import Log error message for Installation Failure Example #2

The error message in the log states that the upgrade process was unable to delete a Document because there are eight pages referencing it in the system. This means that the TeamConnect Legal upgrade design wants to delete a rule, but was unable to. This is because the system data that is not being updated or deleted as part of the upgrade process depends on the Document's existence. The next step is to locate which Document the error message is referring to. For an error such as this, the INFO line message directly above the ERROR line message will contain the object information for which object caused the import failure. In this case, it's the WzDBudgetASYS.class document.

The next step is to check to see if the WzDBudgetASYS.class document appears in the Conflict Report. Since the document was not modified, it does not appear in the Conflict Report.

To resolve this error, locate which wizard pages are referencing the document. Create a copy of the document WzDBudgetASYS.class. Once you have created a copy of the document, change the eight wizard pages to reference the copy of WzDBudgetASYS.class, instead of the original.

Installation Failure Example #3

```
09 Jun 2014 16:02:19,099 DEBUG - applying change Delete ZFRule@16941658[ actionName = null, isActionActivate = false, isActionAssign = false, isActionCheckIn = false, isActionCheckOut = false, isActionCreate = false, isActionDelete = false, isActionDeposit = false, isActionDeactivate = false, isActionPhaseChange = false, isActionPost = false, isActionTransferFrom = false, isActionTransferTo = false, isActionUpdate = false, isActionVoid = false, isActionWithdraw = false, isActionUserInvoke = false, actionTypeID = 3, phaseChangeTypeID = 0, isClassCondition = false, customLogic = 1 and 2, conditionLogicIID = 0, expiration = 1, expireActionIID = 3, timesRepeated = 1, isActive = true, isAllowMultipleApproval = false, message = null, order = 0, primaryKey = 341, shortDescription = IS No Budget And No outside Counsel FINISH, typeIID = 5, updateWhilePendingIID = 0, version = 1, xmlFormat = null, createdOn = Thu Jun 04 02:01:32 CDT 2009, modifiedOn = Thu Jun 04 02:01:32 CDT 2009, uniqueKey = DBOC, startTypeID = 0, startDelayUnitsIID = 0, delayValue = 0, startOn = null, historyLocationTypeID = 0, isUpdateHistory = false, historyDescriptionTypeID = 0, useStopLevelParameters = false, isReviewAllowed = false, isSendForApprovalAllowed = false, isAdditionalApprovalAllowed = false, customActionTypeID = 0, actionOnRejectIID = 0, duplicateApproverActionIID = 0, description = null, repeatTypeID = 0, repeatMinutes = 0, repeatWeekdayOnly = false, repeatDayOfWeek = 0, repeatDayOfMonth = 0, repeatMonth = 0, repeatEndTypeID = 1, endOn = null,]
09 Jun 2014 16:02:19,244 ERROR - Cannot delete Rule because it still has 5 Page Transition Rules referencing it
```

DMT Import Log error message for Installation Failure Example #3

The error message in the log states that it was unable to delete a rule because there are five page transition rules referencing the rule in the system. This means that the TeamConnect Legal upgrade design wants to delete a rule, but was unable to. This is because the system data that is not being updated or deleted as part of the upgrade process depends on the rule's existence. The next step is to locate which rule the error message is referring to. For an error such as this, the INFO line message directly above the ERROR line message will contain the object information for

which object caused the import failure. In this case, it's the No Budget & No Outside Counsel rule.

The next step is to check to see if the No Budget & No Outside Counsel rule appears in the Conflict Report. Since the rule was not modified, it does not appear in the Conflict Report.

To resolve this error, locate which wizard page transitions are referencing the rule. Create a copy of the No Budget & No Outside Counsel rule. Once you have created a copy of the rule, change the five page transition rules to reference the copy of the No Budget & No Outside Counsel rule, instead of the original.

Installation Failure Example #4

```
19 Jun 2014 12:16:32,328 INFO - Committing final unit of work
19 Jun 2014 12:16:32,437 ERROR - You must specify a group, if home page type is group!
com.mitratesoft.teamconnect.foundation.TCApplicationException: You must specify a group,
if home page type is group!
```

DMT Import Log error message for Installation Failure Example #4

The error message in the log states that there is missing information for a home page. Since the error message did not say that the upgrade cannot take action on an object, the failure is likely due to either incompatible resolution choices or invalid data in the TeamConnect instance. To differentiate between these two types of failures, you must look at the Conflict Report. Find a Selection conflict for the Home Page object type, then find a Selection conflict for a Group that the Home Page depends on. Verify which actions you took (Upgrade Action or Client Action) on the Conflict Resolution Screen for these two Selection conflicts.

Resolution Type	Object	Unique Attributes	Parent Description	Upgrade Action	Client Action	Instructions
Selection	Group	{uniqueKey=TransactionAtty}	Groups	update	delete	[Reinsert] or [Keep removal]
Selection	Home Page	{name=TransactionalAttorneys}	Home Pages	update	delete	[Reinsert] or [Keep removal]

Conflict Report data for Installation Failure Example #4

In this example, the failure was caused by selecting the Upgrade Action (Reinsert) for the Home Page object, and the Client Action (Keep removal) for the Group object. When dependencies exist between two Selection conflicts, you must either choose to take the Upgrade Action for both conflicts, or the Client Action for both conflicts. On the next run through Upgrade Toolkit, change one of your Selection choices on the Conflict Resolution Screen.

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