

## TeamConnect Legal Matter Management

### 5.0.1 Patch 7

#### Release Notes

This document provides instructions for installing TeamConnect® Legal Matter Management 5.0.1 Patch 7 (PTCL5001007).

The following patch is a client-specific resolution for existing TeamConnect defects. As such, users will need to contact Mitratesch Support ahead of any future upgrades to obtain a custom Upgrade Toolkit.

---

**Important:** TeamConnect® Legal Matter Management 5.0.1 patches 1, 2, 3, 4, 5 and 6 must be applied prior to applying patch 7.

---

**Issue:** Users that have contact's rights, but no Account rights, should be able to edit an Account's Contact card.

**Tracking code:** SUPPORTPRI-19832

**Case number:** 2016-0823-268588

**Reported Version:** TCE 4.0.6

**Workaround:** Provide Account Rights

**Pre-Requisites:** None

#### Steps to Reproduce:

1. Create a User with Contact rights but NO Account Rights.
2. Using this limited normal User, go to an existing Account (Vendor Specific), and try to edit the account's contact card name and you will receive a system error; specifically in the log as "BEGINSECURITYEXCEPTIONUser justin does not have functional security right : Account, ReadENDSECURITYEXCEPTION".
3. This has been diagnosed as coming from this rule in Contact Object: "RuleUpdateAccountNamesOnContactNameUSYS.class".
4. Using the contact Company Name as: Bachmen and others. Using the limited user as described above.

#### Expected Results of Steps

The client is expecting a User that has contact's rights, but no Account rights and the user should be able to edit an account's contact card, using the system user in this case.

#### Actual Results of Steps

Error as described when trying to edit an Account's Contact Card.

## Root Cause Analysis

Running the rule as systemUser, so that it will update the account contact card when the user has contact rights but not accounts rights.

---

**Issue:** Inactive Vendors and Collaborati matter viewing and billing.

**Tracking code:** SUPPORTPRI-19869

**Case number:** 2016-0920-273671

**Reported Version:** TCE 4.0 U10

## Workaround

1. Add 'General Information' block in object view of Dispute's Involved party object.
2. Open the dispute record and clear the 'Inactive Date' field in 'Involved Party General Information' block' and save the settings.
3. Edit Involved party again and now set the current or an old date in the 'Inactive Date' field in 'Involved Party General Information' block and save the settings.
4. Trigger the CSM sync and the matter should disappear from Collaborati now.

## Pre-Requisites

1. TeamConnect 4.2, Legal Matter Management 4.1.0, CSM 4.0.5 (Recent version we tested in).
2. CSM connection should be functional and an authorized vendor should exist.
3. A dispute record with the vendor as an involved party should exist and that role of vendor should be added in the e-billing role.
4. This matter should be synced to Collaborati and it should exist in the matter list of that Vendor on Collaborati.

## Steps to Reproduce:

1. Login to TCE main UI.
2. Set an old or current date in the 'Inactive Date' field of the 'Involved Party General Information' block and save the settings.
3. Trigger the CSM sync and once it completes, check the matter list on Collaborati for that Vendor.

## Expected Results of Steps

Matter should disappear from the matter list of that vendor on Collaborati after the CSM sync completes.

## Actual Results of Steps

No change on Collaborati, matter exists even after deactivating the Vendor on that matter.

## Root Cause Analysis

TC checks whether an involved user is inactivated or not based on attribute "isActive". If we modify InactiveDate Custom Field it doesn't set the correct value to "isActive".

---

**Issue:** Unable to perform custom search for Contacts using Web Address in the Filter Criteria.

**Tracking code:** SUPPORTPRI-43268

**Case number:** 2018-0827-473264

**Reported Version:** TCE 5.2.2

**Workaround:** NA

### Pre-Requisites

1. TeamConnect 4.2.8 OR 5.2.2
2. TeamConnect Legal Matter Management should be installed.

### Steps to Reproduce:

1. Login to TeamConnect.
2. Go to Contacts.
3. Perform the Custom search using "Web Address" in the Filter Criteria.

### Expected Results of Steps

Users should be able to perform custom searches using Web Address in filters.

### Actual Results of Steps

User is getting the error as "There is a problem in the paged search result. Please contact your Administrator" on the UI.

## Root Cause Analysis

Incorrect search key.

---

**Issue:** Matters are displayed in Collaborati after the client removes the firm from the matter.

**Tracking code:** SUPPORTPRI-54616

**Case number:** 2020-0414-598657

**Reported Version:** CSM 6.2.2

**Workaround:** None

### Pre-Requisites:

Must have TC or TC Essentials 6.2 or higher and a firm in Collaborati authorized in TC.

### Steps to Reproduce:

1. Add the firm to the matter.
2. Go to a matter.
3. Click Involved/Assignees.
4. Add the firm to the matter.
5. Run a CSM Sync.
6. Log into Collaborati as the firm and confirm the matter has synced over.
7. In TeamConnect, remove the firm from the matter (you may deactivate the firm or delete it entirely from the matter).
8. Run the CSM Sync.
9. Log into Collaborati and confirm that the matter is still assigned to the firm.

## Expected Results of Steps

The matter association in Collaborati should match the association in TC.

## Actual Results of Steps

The matter association is not synced in Collaborati when a firm is removed from a matter.

## Root Cause Analysis

TC checks whether an involved user is inactivated or not based on attribute "isActive". If we modify InactiveDate Custom Field it doesn't set the correct value to "isActive".

---

## Below fixes were merged in from TCL 5.0.1 Patch 1- 6

**Issue:** Contact SYS Rule does not update all associated accounts.

**Tracking code:** SUPPORTPRI-33397

**Case number:** 2017-1010-404378

**Reported Version:** FMR 5.0

**Initial Fix Version:** TCL 5.0.1 Patch 1

**Workaround:** None

## Pre-Requisites:

None.

## Steps to Reproduce:

1. Vendors should have multiple accounts.
2. Set max search results to less than the number of accounts.
3. Update Vendor Contact Name.
4. View All Accounts.

## Expected Results of Steps

Change in the client name on all accounts.

## Actual Results of Steps

Number of account updates is equivalent to Max Search Results in Admin Settings.

## Root Cause Analysis

None.

---

**Issue:** Pagination buttons do not work within a Tomcat Clustered Environment.

**Tracking code:** SUPPORTPRI-18078

**Case number:** 2016-0421-245528

**Reported Version:** TCE 4.0 U10

**Initial Fix Version:** TCL 5.0.1 Patch 2

**Workaround:** The client will not encounter the error when using the NEXT button and they can increase the results display to a hundred in order to reduce the number of pages that are populated.

## Pre-Requisites:

None.

## Steps to Reproduce:

\*This test will need to be performed on an TCE instance deployed on a Tomcat clustered environment.

1. Create 4 invoices and post them to the same matter.
2. Change number of Records per result page to 1 within ADMIN -> Admin Settings -> Search Results.
3. Access the matter you created which the invoices are posted to.
4. Click on Invoices/Expenses (default).
5. Click on the LAST Button. LastButton.png

## Expected Results of Steps

The last page should populate with the last page results.

## Actual Results of Steps

The user encounters an error when they click on any of the buttons other than from NEXT.

## Root Cause Analysis

None.

---

**Issue:** Invoice/Expense Search in Dispute Navigation Buttons.

**Tracking code:** SUPPORTPRI-32255

**Case number:** 2017-0912-398005

**Reported Version:** LMM 5.0

**Initial Fix Version:** TCL 5.0.1 Patch 2

**Workaround:** Click the previous link instead of using the arrows

**Pre-Requisites:**

1. TeamConnect 5.0 U2.
2. TeamConnect Legal 5.0 U1.
3. Multiple Invoices (at least 15 invoices) should be created and associated to a single Dispute record.

**Steps to Reproduce:**

1. Login to the TeamConnect application.
2. Open the prerequisite 'Dispute' record where prerequisite Invoices were associated.
3. Click on 'Invoice/ Expenses' in the left navigation menu.
4. Under the Invoice block, change the dropdown for "invoices per page" to 10.
5. The 'Next/ Previous' navigation icon 4 navigator icons get populated and all are pointing to 'Right' direction.

**Expected Results of Steps**

The directional arrow icons show correctly.

**Actual Results of Steps**

1. On the first page of invoices, there are two arrows pointing to the right.
2. On the second page, both arrows still point to the right and none to the left.

**Root Cause Analysis**

The text value of the buttons was all set to the same thing.

---

**Issue:** Time Entry Tool Unable to Find Correct Time Periods.

**Tracking code:** SUPPORTPRI-37287

**Case number:** 2018-0403-442397

**Reported Version:** TCL 5.0.1

**Initial Fix Version:** TCL 5.0.1 Patch 3

**Workaround:** Wait till daylight savings switches again.

**Pre-Requisites:**

1. Install Legal.
2. Change the Server time to (UTC+00:00) Dublin, Edinburgh, Lisbon, London and make sure daylight savings is active.

**Steps to Reproduce:**

1. Go to the Time Entry Settings object. Select the existing Time Entry Settings record.
2. Go to Time Periods.
3. Click edit and enter a date for the start date as well as enter a date for the end date.  
Ex. 4/1/2017 - 4/7/2018.
4. Click Generate to create time periods.
5. Set the category for your user's contact card to Internal.
6. Navigate to the Time Entry tool page.

**Expected Results of Steps**

The users can enter new time entries.

**Actual Results of Steps**

Error displayed to the user:

"The time period does not exist for the requested date. Please choose another date."

**Root Cause Analysis:**

None

---

**Issue:** Time Entry Settings > Unable to enter a Timekeeper for more than one Designated Timekeeper.

**Tracking code:** SUPPORTPRI-40981

**Case number:** 2018-0626-460439

**Reported Version:** TCL 5.0.1

**Initial Fix Version:** TCL 5.0.1 Patch 4

**Workaround:** None

**Pre-Requisites:**

Create at least 3 normal user accounts without any Admin access.

## Steps to Reproduce:

1. Navigate to All > Time Entry Settings > Time Entry Settings.
2. Edit the record and navigate to the Designated Timekeepers tab.
3. Enter the appropriate values in the 'Timekeeper' and 'Designated Timekeeper' fields.  
For example: The user called "Test User" can enter time for "TE, TE".
4. Now, "Test User" should also be allowed to enter time for another user for e.g. "Test, Test".  
However, the following error is displayed:  
"Error: Timekeeper: Cannot add duplicate timekeeper"

## Expected Results of Steps

A user should be allowed to enter time for more than 1 designated user.

## Actual Results of Steps

A user is not allowed to enter time for more than 1 designated user.

## Root Cause Analysis

None.

---

**Issue:** Time Entry Tool > Incomplete list of users in the 'Timekeeper' field.

**Tracking code:** SUPPORTPRI-41743

**Case number:** 2018-0712-463749

**Reported Version:** TCL 5.0.1

**Initial Fix Version:** TCL 5.0.1 Patch 5

**Workaround:** None

## Pre-Requisites:

1. Apply TeamConnect Legal 5.0.1 Patches 3 and 4.
2. Create a few normal users in the application.

## Steps to Reproduce:

1. Navigate to All > Time Entry Settings > Time Entry Settings
2. Edit the record and navigate to the Designated Timekeepers tab.
3. Enter the appropriate values in the 'Timekeeper' and 'Designated Timekeeper' fields.  
For example: The user called "Test User" can enter time for "TE, TE".
4. Now, "Test User" should also be allowed to enter time for another user for e.g. "Test, Test".
5. Now log in as "Test User" again.
6. Navigate to the Time Entry Tool.



7. In the Timekeeper list - There are only 2 users. It should be displaying all the users where the user is listed for the Designed TKs. In this example, it should be showing - Test User; TE, TE and Test, Test.

## Expected Results of Steps

The current user and the users listed against the 'Designated Timekeeper' should be showing in the 'Timekeeper' field of the Time Entry Tool.

## Actual Results of Steps

An incomplete list in the 'Timekeeper' field shows in the Time Entry Tool.

## Root Cause Analysis

Methods weren't set up to get a list of the user's designated timekeepers, it was just getting the first one returned and passing that.

---

**Issue:** The rule - RuleUpdateAccountNamesOnContactNameUSYS generates security errors/performs inconsistent updates.

**Tracking code:** SUPPORTPRI-48604

**Case number:** 2019-0423-522449

**Reported Version:** TCL 5.0.1

**Initial Fix Version:** TCL 5.0.1 Patch 6

**Workaround:** None

## Pre-Requisites:

1. Create a Group 1 and give ALL User Rights. Add User 1 of type 'Normal' to this group.
2. Create a second Group 2 and give ALL Rights. Add User 2 of type 'Normal' to this group.
3. Create a Matter and add an involved party on the matter. Create a budget associated with this involved party on the matter.
4. There should be a few accounts created associated with the matter/vendor. We only care about the vendor specific accounts.
5. For one of those vendor specific accounts, update the object level security, mark the Account as 'Private' and allow Group 1 to 'Read' it only. Group 1 should not be allowed to 'Update' it.

## Steps to Reproduce:

1. Login as User 1.
2. Edit the contact record tied to the involved party for which the budget/accounts have been created.
3. Update the name of the contact.

4. The Rule - Accounts Name Update On Contact Name - Update - SYS triggers and generates the following message  
“The system experienced a problem and could not complete your request. Please try your request again or have your system administrator check the system logs for additional details”
5. Login as User 2.
6. Edit the same contact.
7. The contact is successfully updated. However, the rule triggers but does NOT update the associated account name change.
8. The rule is using the current user privileges instead of bypassing the security via system user.

## Expected Results of Steps

The rule - Accounts Name Update On Contact Name - Update - SYS must bypass security.

## Actual Results of Steps

The rule - Accounts Name Update On Contact Name - Update - SYS triggers and generates security errors.

## Root Cause Analysis

Updated rule to run as System user rights.

## OVERVIEW

---

The following list is a summary of the procedures necessary to install this patch.

1. Log into TeamConnect as an administrator.
2. Click the **Admin** tab.
3. Click **Admin Settings** under the tab bar, if it is not already selected.
4. In the left pane, click the **About** link.
5. In the **Available Updates** section, locate TeamConnect® Legal Matter Management 5.0.1 Patch 7, Click **Install Now**, and follow the installation instructions  
**Note:** Use ojdbc6.jar or ojdbc7.jar drivers for Oracle while installing Legal Matter Management.
6. Stop and start your TeamConnect instance.