

This document details the upgrade information, new features, resolved issues, and known issues that are included in Financial Management 6.3.2

1 System Requirements

To install TeamConnect Financial Management 6.3.2, you must be running TeamConnect Enterprise 5.0.5 or later.

TeamConnect Financial Management 6.3.2 is compatible with the following optional TeamConnect products:

- TeamConnect Legal Matter Management 5.0 or later.
- Collaborati Spend Management 5.0 or later.

Users utilizing line item level non-US taxes should contact Mitratech support regarding their upgrade.

Note: Any changes to the Budget Screen Custom Java Blocks (CJBs) must be applied not only to the screens used by the Module Setup Tool to add budgets to custom objects, but also to any custom objects that have already had budgets added to them.

2 Installation

You must have admin rights to install this product.

To install TeamConnect Financial Management 6.3.2:

1. In TeamConnect, click the Admin tab, and then click the Admin Settings sub-tab link.
2. In the left pane, click the About link.
3. In the Available Updates section, click Show Updates Available for Installed Products.
4. Locate TeamConnect Financial Management 6.3.2
5. Click Install Now.
6. If the installation is successful, run the below scripts (For SUPPORTPRI-65271) as per TeamConnect database product and restart TeamConnect.

Note: This step is only required for an upgrade and is not required for a fresh install.

a) For Oracle Database:

- i) First, check the number of accounts starting on 01-JAN-2005 and Ending on 31-DEC-2025:

```
SELECT COUNT(*) from T_ACCOUNT WHERE (APPL_START_ON LIKE '%01-JAN-05%' OR APPL_START_ON LIKE '%2005-01-01%') AND (APPL_END_ON LIKE '%31-DEC-25%' OR APPL_END_ON LIKE '%2025-12-31%');
```

- ii) The Query to update GlobalStartDate and GlobalEndDate:

```
UPDATE E_BSO$ SET GLOBALENDDATE='', GLOBALSTARTDATE='' where (GLOBALSTARTDATE LIKE '%01-JAN-05%' OR GLOBALSTARTDATE LIKE '%2005-01-01%') AND (GLOBALENDDATE LIKE '%31-DEC-25%' OR GLOBALENDDATE LIKE '%2025-12-31%');
```

```
commit;
```

- iii) Query to update start date and end date of accounts:

```
UPDATE T_ACCOUNT SET APPL_END_ON = '', APPL_START_ON='' WHERE (APPL_START_ON LIKE '%01-JAN-05%' OR APPL_START_ON LIKE '%2005-01-01%') AND (APPL_END_ON LIKE '%31-DEC-25%' OR APPL_END_ON LIKE '%2025-12-31%');
```

```
commit;
```

- iv) Query to Check total accounts that are updated:

```
SELECT COUNT(*) from T_ACCOUNT WHERE APPL_END_ON is null and APPL_START_ON is null;
```

b) For MSSQL Database:

- i) First, check the number of accounts starting on 01-JAN-2005 and Ending on 31-DEC-2025:

```
SELECT COUNT(*) from T_ACCOUNT WHERE (APPL_START_ON LIKE '%01-JAN-05%' OR APPL_START_ON LIKE '%2005-01-01%') AND (APPL_END_ON LIKE '%31-DEC-25%' OR APPL_END_ON LIKE '%2025-12-31%');
```

ii) The Query to update GlobalStartDate and GlobalEndDate:

```
begin tran

UPDATE E_BSO$ SET GLOBALENDDATE='', GLOBALSTARTDATE='' where
(GLOBALSTARTDATE LIKE '%01-JAN-05%' OR GLOBALSTARTDATE LIKE
'%2005-01-01%') AND (GLOBALENDDATE LIKE '%31-DEC-25%' OR
GLOBALENDDATE LIKE '%2025-12-31%');

commit tran;
```

iii) Query to update start date and end date of accounts:

```
begin tran

UPDATE T_ACCOUNT SET APPL_END_ON = '', APPL_START_ON='' WHERE
(APPL_START_ON LIKE '%01-JAN-05%' OR APPL_START_ON LIKE
'%2005-01-01%') AND (APPL_END_ON LIKE '%31-DEC-25%' OR APPL_END_ON
LIKE '%2025-12-31%');

commit tran;
```

iv) Query to check number of accounts updated:

```
SELECT COUNT(*) from T_ACCOUNT WHERE APPL_END_ON is null and
APPL_START_ON is null;
```

Note: If the installation is not successful, TeamConnect Financial Management 6.3.2 does not appear as an Installed Product.

Note: In FM 6.3.2, the MBI block is visible for all invoice types except appeals.

3 Resolved Issues

This section describes the issues that are resolved in the Financial Management 6.3.2 release. Financial Management 6.3.2 introduces defect resolutions from previous releases as noted below. Each resolved issue is documented in the following format:

- A description of the issue
- Internal tracking code
- Case number
- Reported Version

Issue: Invoice > Budgets > 'Pending Invoices' column does not show amounts converted in System Currency if the invoice is in a different currency.

Tracking code: SUPPORTPRI-65272

Case number: 2022-0727-963024

Reported Version: FMR 6.3.1

Initial Fix Version: FMR 6.3.2

Issue: Filter settings on Budget Page are not working as per design only in the version TCE 6.2.5.

Tracking code: SUPPORTPRI-60610

Case number: 2021-0414-767869

Reported Version: TCE 6.2.5

Initial Fix Version: FMR 6.3.2

Issue: FMR - Task & Expense Codes are not aligned in the Dispute Budgets.

Tracking code: SUPPORTPRI-60757

Case number: 2020-0611-618359

Reported Version: TCE 6.2.2

Initial Fix Version: FMR 6.3.2

Issue: When Add Fiscal Year is selected, the Use Stored Template field is being displayed as a text field instead of checkbox.

Tracking code: SUPPORTPRI-63782

Case number: 2021-0817-819393

Reported Version: TCE 6.3.1

Initial Fix Version: FMR 6.3.2

Issue: Need to remove "goalpost" years value as 2025 & change it to null.

Tracking code: SUPPORTPRI-65271

Case number: None

Reported Version: None

Initial Fix Version: FMR 6.3.2

Issue: Unable to install FM 632 on TC7.1 from available updates.

Tracking code: TC-49089

Case number: None

Reported Version: TCE 7.1, TC Legal Matter Management 5.0.1 Patch 7 and TC Financial Management 6.3.1 Patch 3.

Initial Fix Version: FMR 6.3.2

Workaround: Follow the below steps:

1. Navigate to Documents.
2. Select the Top Level and open System folder.
3. Delete the files "UpgradeBudgetSettingsAction.class" and "UpgradeBudgetSettingsAction\$1.class".
4. Restart the server.
5. Then, upgrade to FMR 6.3.2.

The following issues had been addressed in updates to earlier versions of Financial Management and are also included in this update:

Issue: Cannot unmap any matter cost centers if invoice cost centers are enabled - even if we never posted against that cost center.

Tracking code: SUPPORTPRI-65508

Case number: 2022-0912-982353

Reported Version: FMR 5.0.5

Initial Fix Version: FMR 5.0.5 Patch 5

Issue: Time taking for invoice bulk final approval is longer than expected.

Tracking code: SUPPORTPRI-65054

Case number: 2022-0802-965195

Reported Version: FMR 6.3.1

Initial Fix Version: FMR 6.3.1 Patch 2

Issue: No data is shown in Matter Budget Insight for an Invoice with Tax.

Tracking code: SUPPORTPRI-61353

Case number: None

Reported Version: TCE 6.3.0 & FMR 6.3.0

Initial Fix Version: FMR 6.3.1 Patch 1

Issue: Matter > Budgets > Accruals show massive negative accrual amounts.

Tracking code: SUPPORTPRI-59866

Case number: 2020-0917-638250

Reported Version: FMR 5.0.3

Initial Fix Version: FMR 5.0.4 Patch 1