

TeamConnect® Enterprise

6.3.5 Patch 22

Release Notes

TeamConnect® Enterprise 6.3.5 Patch 22 (PTC6350022) resolves the following issue:

Issue: System Error occurs when performing Global search using Object Link in Search View

Tracking Code: SUPPORTPRI-66855

Case Number: 2023-0213-7656007

Reported Version: TCE 6.3.5

Workaround

None

Pre-Requisites

- TeamConnect instance with Elastic Search configured.
- A Contact with 'a (' in last name and 'Test-66855' as First name.
- Create a Search View to be used for Global Search and add 'Object Link' in the Results Display.

Steps to Reproduce

1. Login to TeamConnect.
2. Navigate to Tools > Global Search Index Tool > Index Contacts.
3. Once Indexing is complete, perform a Global Search with either 'Test' or '66855'.

Expected Results of Steps

Global Search is performed successfully and results are displayed.

Actual Results of Steps

The system error and logs are displayed.

Root Cause Analysis

Object links text was not escaped.

Issue: Global Search - "Show Exact Matches Only" fails to exclude non-exact results

Tracking Code: SUPPORTPRI-66762

Case Number: 2023-0117-7625629

Reported Version: TCE 6.3.5

Workaround

No

Pre-Requisites

NA

Steps to Reproduce.

In TC v6.3.5 PROD environment (also tested with 6.3.5 patch 21 in our TEST environment):

1. Run a Dispute Global Search for the word 'damage' (NOT in quotes). TC shows 3,217 results but this includes variations of the term, such as "damages" or "damaged".
2. Check the "Show Exact Matches Only" checkbox in the left-hand filter panel and click Apply
3. When the screen refreshes, TC shows the exact same thing as before: 3,217 results, with the same matters listed as before, even the ones that are NOT exact matches (e.g. "damages", "damaged", etc).
4. Re-run the search but use "damage" instead (in quotes). TC shows the same exact result, 3,217. The quotes do not change anything.
5. Re-run the search using variations of the word damage: "damages", "damaged", "damaging", etc. Both with or without quotes. These all have the same result as the original 'damage' (without quotes).

Expected Results of Steps

Quotes should produce more direct results.

Actual Results of Steps

Both with or without quotes. These all have the same result as the original 'damage' (without quotes).

Root Cause Analysis

Filtering is not done correctly.

Issue: Issue with adjusting invoices and reverting adjustments

Tracking Code: SUPPORTPRI-66766

Case Number: 2022-1220-7600237

Reported Version: TCE 6.3.5

Workaround

NA

Pre-Requisites

- TeamConnect Login.
- In Admin Settings on the Invoice Tab, set comments to Requestor as required and set In House Comments as required.

Steps to Reproduce.

1. Adjustment Test
 - Navigate to an invoice.
 - Make an adjustment.
 - Comments to Vendor should show as required.
 - Don't add a Comment to the vendor.
 - Save the invoice.
2. Revert Adjustment Test

- Navigate to an invoice.
- Make an adjustment.
- Add Comments to Vendor.
- Save the invoice.
- Click on the Revert button.
- Select the adjustment to revert.
- Comments to Vendor should show as required.
- Don't add a comment.
- Save the Invoice.

Expected Results of Steps

An error message should be displayed that a Comment to Vendor is required

Actual Results of Steps

No message is displayed and the adjustment is made

Root Cause Analysis

Check for "Comments to Requestor" required was missing.

Issue: Assignee in Global Search results is incorrect when the search includes a middle character with a period, such as a person's initial.

Tracking Code: SUPPORTPRI-65499

Case Number: 2022-0902-979499

Reported Version: TCE 6.3.5

Workaround

None

Pre-Requisites

NA

Steps to Reproduce.

1. Create a global search search view:
 - mainAssignee.user.
 - defaultCategory.
 - closedOn.
 - openedOn.
 - currentPhaseType.
 - numberStringUpper
2. Create a new record
3. Name the record 'Blue v. Yellow'
4. Add a main assignee
5. Save and Close
6. Do a Global Search for Blue v. Yellow.
7. The Result for Assignee is not correct.

Expected Results of Steps

The assignee for the returned record should be correct.

Actual Results of Steps

The assignee information is not correct.

Root Cause Analysis

Highlighting logic was corrupting HTML tags.

Issue: CTU - List field Qualifiers primary keys do not match in both environments

Tracking Code: SUPPORTPRI-63245

Case Number: 2021-1109-856034

Reported Version: TCE 6.2.6

Workaround

This requires manually moving rules from environment to environment. It also requires review by a team that is migrating designs. This adds a lot of man hours for the Services team.

Pre-Requisites

Admin user with setup rights.

Two environments: Base and Target.

Steps to Reproduce.

To set this up, the user needs to manipulate it so that the same design the user plans to use exists but everything has different primary keys. This emulates the real world difference between users' environments.

1. In the Base environment, create two lookup tables: A and B.
 - a. Add two lookup items for each.
 - b. Check the lookup item primary keys for items in table B.
2. In Test Environment, create one lookup table: B
 - a. Add the same two lookup items created above
 - b. Check lookup item primary keys for item in table B. They should be different from the ones above. If not, delete them and create them again (the primary keys should then be different).
3. In the Base environment, create a custom field on the Contact object of type List, using a lookup table.
4. In the Base environment, create a rule on Contact objects of any type.
 - a. Add Prerequisite #3 custom field as qualifier
 - b. "equals to"
 - c. Any list item in lookup table B.
5. Using CTU Export, export the creation of the custom field, rule, and qualifier.
6. Using CTU Import in Target environment, import the custom field, rule, and qualifier.
7. In the Target Environment, navigate to the rule and its qualifier tab.
8. Observe the rule qualifier lookup value is blank.

Expected Results of Steps

Rule qualifier should be transferred without issue

Actual Results of Steps

CTU is unable to locate the correct lookup item because primary key in Target environment doesn't match the one in the base environment

Root Cause Analysis

Primary Keys are used for fetching details but primary Keys can be different for two instances

Issue: The audit rule is not capturing the assignee email address

Tracking Code: SUPPORTPRI-63104

Case Number: 2021-0916-832002

Reported Version: TCE 6.3.3

Workaround

NA

Pre-Requisites

1. TCE 6.3.3 version.
2. Create a dispute record.
3. There should be an additional assignee other than the main assignee on the disputed record with the role paralegal or secretary.
4. Contact card of the assignee should have an email address populated.
5. Create an audit rule that is triggered during the creation and update of matters.
6. For the action tab configuration of the audio rule, please refer to the attached screenshot.

Steps to Reproduce.

1. Any change on the dispute record to trigger the audit rule.
2. The main assignee email address is showing in the audit history but not the other assignees.

Expected Results of Steps

The audit rule should capture the assignee email address.

Actual Results of Steps

The audit rule is not capturing the assignee email address.

Root Cause Analysis

Using the right method to call Reflection API.

Issue: Search view column wrapping not functioning with long column name.

Tracking Code: SUPPORTPRI-66821

Case Number: 2022-0915-983986

Reported Version: TCE 5.2.1

Workaround

Rename the search view column name.

Pre-Requisites

Search view with a few columns and a large column name.

Steps to Reproduce.

1. Go to a particular search view in the setup.
2. Create a new column or edit a column name to a long name.(e.g :Interviewee (Historical eDiscovery/Data Requests))
3. Save the search view, log out and log in.
4. Check the column width in the teamconnect UI.

Expected Results of Steps

The column width in the search view in the team connect UI must be displayed according to the column width set in the setup.

Actual Results of Steps

When a long name is used for one of the columns, the column in the teamconnect UI takes the size of the name instead of the size allocated in the setup.

Root Cause Analysis

Implemented fixed table columns widths for interactive grid for project list.

Maintenance Notes

- This fix is applicable only when Interactive Grids are enabled.
- The fix will not work for Contacts.
- If the sum of column widths is greater than 100, the fix will not work.
- If "Enable Edit column" on search results is enabled, the fix will not work.
- If the column width is equal to zero, the fix will not work.

This patch will be merged into a TeamConnect 7.1 update.

INSTALLATION

Important: Stop your TeamConnect® instance before updating any files in the TeamConnect® war file.

Note: TCE 6.3.5 Patch 13 and TCE 6.3.5 Patch 16 cannot be installed after TCE 6.3.5 Patch 22.

1. Update database and version information

Use the following steps to update the database and add patch version information to the **About** page of the **Admin Settings**.

1. Stop the TeamConnect® instance if it is currently running.
2. Backup your TeamConnect® database.
3. Run the script, located in **update**, that is appropriate for your database server:
 - MSSQL_TeamConnect_635_Patch22.sql
 - ORACLE_TeamConnect_635_Patch22.sql
4. Restart TeamConnect®.

UPGRADE CONSIDERATION

No significant upgrade considerations for this patch.

LEVEL OF RISK TO UPDATE WITH PATCH

LOW