

TeamConnect® Enterprise

6.3.7 Patch Bundle 4

Release Notes

TeamConnect® Enterprise 6.3.7 Patch Bundle 4 (PTC6370004) includes fixes from TCE 6.3.5 Patch 22, 23, 24 and 25

TCE 6.3.7 Patch Bundle 4 (PTC6370004) resolves the following issues:

Issue: Getting errors when approving Invoices concurrently.

Tracking Code: SUPPORTPRI-67033

Case Number: 2023-0208-7651388

Reported Version: TCE 6.3.7

Workaround

No.

Pre-Requisites

- TeamConnect Instance with Legal, FM & CSM.
- 2 Users with Workflow Approval Rights - User A & User B.
- A Dispute with Involved & Budget created.
- Invoices 1 & 2 (Use same Exp & Fee codes) created for the above Dispute and ready to be posted.
- Invoices 3 & 4 (Use Diff Exp & Fee codes) created for the above Dispute and ready to be posted.

Steps to Reproduce

1. As the Test requires concurrent Approval, Both User A & User B should login to TeamConnect at the same time.
2. User A should Post Invoice 1 & User B should Post Invoice 2 at the same time.

Expected Results of Steps

The Invoices are posted and no errors in the logs.

Actual Results of Steps

An Optimistic lock exception is seen in the Logs -
org.eclipse.persistence.exceptions.OptimisticLockException.

Root Cause Analysis

If 2 invoices are posted at the same time and they go against the same account, a concurrency update collision can happen.

Issue: Adjustment reason is not showing correctly in the process of editing the line items.

Tracking Code: SUPPORTPRI-67462

Case Number: 2022-0222-894807

Reported Version: TCE 6.3.7

Workaround

NA.

Pre-Requisites

- TeamConnect with Legal installed.
- An Invoice with 2 Line items and entered workflow but not Posted.

Steps to Reproduce

1. Open an invoice in workflow which has 2 line items.
2. Click on bulk line adjustment and select the line items to adjust inline and edit it.
3. Adjust some amount/quantity, select the reason for adjustment and specify comments for Vendor and Inhouse for the 1st line item.
4. Click save for 1st line item.
5. Adjust some amount/quantity, select the reason for adjustment and specify comments for Vendor and Inhouse for the 2nd Line Item. (Select reason and enter the comments different to the one's selected in 1st line item).
6. Click save for the 2nd line item.
7. Do not save the entire adjustment screen yet.
8. Now, select the adjustment reason of the 1st line item. The user can notice that it is showing the adjustment reason selected for the 2nd line item.

Note : Upon saving, adjustment reasons show correctly on 2 line items. This behavior is before the entire adjustment screen is saved and closed.

Expected Results of Steps

It should show adjustment reasons as selected.

Actual Results of Steps

The 1st line item displays the adjustment reason for the 2nd line item before saving.

Root Cause Analysis

Select element is not refreshing upon assigning new value.

Issue: Custom Approval Route / Conditions not being handled properly when Client updates certain Matter Assignees

Tracking Code: SUPPORTPRI-67480

Case Number: 2023-0510-7839120

Reported Version: TCE 6.3.7

Workaround

None.

Pre-Requisites

- TCE 6.3.7
- TC Legal 5.x and latest applicable FMR installed.
- Upload the kranium-teamconnect-utils.jar into Top Level / System / Libraries.
- Upload attached class files to Top Level/System/Object Definitions/Invoice/Rules/Automated Qualifiers:
RuleINVCCheckThirdPartyMatterInvoiceApprover1DontHaveLimitQCST.class
RuleINVCCheckThirdPartyMatterInvoiceApprover2DontHaveLimitQCST.class
RuleINVCCheckThirdPartyMatterInvoiceApprover3DontHaveLimitQCST.class
RuleINVCCheckThirdPartyMatterInvoiceApprover4DontHaveLimitQCST.class
- Create Object SGNT.
 - SGNT - General.jpg
- Navigate to SGNT's embedded objects and create a new embedded record.
 - SGNT - Embedded Objects(SAPL).jpg
 - SAPL - General.jpg
 - SAPL - Custom Fields.jpg
 - SAPL - List Display.jpg
- Create super users with the following names. Give them rights to a group with access to all objects and make them active (for testing purposes):
 - Braden Wilhelm
 - Mustufa Salehbhai
 - Michelle Huber
 - Cole Ferguson-Cogdill
 - Bennett Weaver
- Navigate to object SGNT and create a new record, pointing to Mustufa Salehbhai and Michelle Huber respectively.
 - In each record, navigate to the Signatory Approvals Limits tab and create a record, filling in a value for each field.
- In Setup, update Dispute Assignee Roles to include the following (DISP - Assignee Roles.jpg).
- Create a new Dispute and add Braden, Mustufa, Michelle to assignee roles as per (Dispute - Assignee Roles Initial.jpg):
 - Dispute should either have a budget or 'allow posting without budget' enabled so that invoice posts successfully when approved.
- In Setup, Navigate to Invoice / Conditions tab.
- Create Conditions per Invoice - Conditions.jpg by creating the following conditions
 - Invoice - Condition 1.jpg (java class per precondition 4)
 - Repeat for conditions 2 through 4
- Navigate to the Invoice / Rules tab and create a new Approval:
 - Invoice - Approval General.jpg
 - Save the rule.
- Navigate to the Action tab and click on "Routes List".
- Create a new Invoice Route per Invoice - Route General.jpg

- Save the Route and navigate to Stops and create stops per Invoice - Route Stops 1.jpg, Invoice - Route Stops 2.jpg, Invoice - Route Stops 3.jpg.
- Save the route.
- Navigate back to the Invoice Action tab and select the route. It should appear as: Invoice - Approval Action.jpg.
- Save the Invoice Rule.

Steps to Reproduce

1. Create an invoice pointing to pre-requisite disputes.
2. Post the invoice.
3. Invoice Workflow Tab should appear as - (Invoice Record - Post - Workflow.jpg).
4. Navigate back to the Dispute and update the assignee roles to match (Dispute - Assignee Roles Updated.jpg).
Note: This is critical to reproduce the defect, invoice behaves correctly otherwise.
5. Log out of your admin user and log in as Braden.
6. Navigate to the Invoice in Braden's workflow and Approve.

Expected Results of Steps

Invoice should go to Stop 2, which is Mustufa because Braden returns 'true' and Mustufa was in the workflow at the time invoice was posted.

- Invoice should then go to Stop 3, Michelle Huber:
 - This is because the current assignee in 'stop 2' role is Cole, not Mustufa.
 - It goes to Michelle because she was in the workflow at the time the invoice was posted.

Actual Results of Steps

Invoice is approved immediately after Braden approves.
Mylog.txt contains log file with Rule on DEBUG

Root Cause Analysis

isFinalApproval() method returning true for non-final approval stop.

Below fixes were merged in from TCE 6.3.5 Patch 22, 23, 24 and 25

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

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

Issue: Issue with adjusting invoices and reverting adjustments

Tracking Code: SUPPORTPRI-66766

Case Number: 2022-1220-7600237

Reported Version: TCE 6.3.5

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

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

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

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

Issue: Invoice Workflow condition is not working where active assignee's (on matter) approval limit is compared to a custom field in invoice

Tracking Code: SUPPORTPRI-67045

Case Number: 2023-0316-7714315

Reported Version: TCE 6.3.5

Issue: Manage List not working as expected

Tracking Code: SUPPORTPRI-67095

Case Number: 2023-0315-7713494

Reported Version: TCE 6.3.5

Issue: Bad records in Y_RECORD_CHANGE stop all indexing until table truncated

Tracking Code: SUPPORTPRI-64639

Case Number: 2022-0418-918497

Reported Version: TCE 6.3.3

Issue: User is unable to view Admin Settings view page

Tracking Code: SUPPORTPRI-67013

Case Number: 2023-0225-7692292

Reported Version: TCE 6.3.5

Issue: Global search having issue with Special character and blank space.

Tracking Code: SUPPORTPRI-67344

Case Number: 2023-0221-7687777

Reported Version: TCE 6.3.5

Known Issues

The following items are known issues in the TeamConnect Enterprise® 6.3.7 Patch Bundle 4 release. Each issue is documented in the following format:

- A description of the issue
- Internal tracking code
- Workaround

The fixes in this patch will be merged into TCE 7.1.

INSTALLATION

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

1. Update WAR file

Windows GUI:

- Extract patch directory from the .zip file.
- Open the TeamConnect® .war file with 7zip
- Drag and Drop the files from patch directory to .war root in 7zip
- Overwrite file conflicts in 7zip
- Redeploy .war

Windows CMD:

- tar -xf <path_to_patch_zip>
- cd <path_to_extracted_directory>
- jar -uvf <path_to_war> .\
- Redeploy .war

Linux Terminal:

- unzip <path_to_patch_zip> -d <path_to_destination_folder>
- cd <path_to_destination_folder>
- jar -uvf <path_to_war> .\
- Redeploy .war

2. 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_637_PB4.sql
 - ORACLE_TeamConnect_637_PB4.sql
4. Restart TeamConnect®.

UPGRADE CONSIDERATION

No significant upgrade considerations for this patch.

LEVEL OF RISK TO UPDATE WITH PATCH

LOW