TeamConnect Enterprise® 7.1

This document details the upgrade information, new features, resolved issues, and known issues that are included in TeamConnect Enterprise® 7.1

1   System Requirements

Before you begin to install TeamConnect 7.1, ensure that your system meets the requirements. For a full list of requirements, refer to the Installation Requirements in the TeamConnect Enterprise 7.1 Installation Guide.

The following versions of TeamConnect can be upgraded to TeamConnect 7.1

- TeamConnect 5.0 (through 5.0.10)
- TeamConnect 5.1 (through 5.1.1)
- TeamConnect 5.2 (through 5.2.10)
- TeamConnect 6.0 (through 6.0.2)
- TeamConnect 6.1 (through 6.1.2)
- TeamConnect 6.2 (through 6.2.6)
- TeamConnect 6.3 (through 6.3.7)
- TeamConnect 7.0

TeamConnect 7.1 is designed to pair with the following versions of modules (notes below reflect the available versions as of the TeamConnect 7.1 release date):

- AP Link 5.1
- TC Business Intelligence 6.3.0
- Collaborati Spend Management (CSM) 7.1
- Data Warehouse 7.0
- Deadlines 5.1.1 + Patches 1-2
- Financial Management 6.3.1 + Patch 1-2
- Legal Matter Management 5.0.1 + Patches 1-6
- Office Suite 3.3.0 + Patches 1-2
- Screen Designer 5.2.1
- Service of Process (SOP) Manager 7.1
- TC Essentials 6.3.1
- TeamConnect-TAP Integration 1.1
- TeamConnect O365 Add-In 4.0
- Global Search Connector 1.0
- Please visit the 3rd Party Software Matrix for version compatibility information for Elasticsearch, App Servers, etc.

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2   Upgrade Considerations

➔ TeamConnect 7.1 is only certified against **Elasticsearch 8.6.2.**

➔ TeamConnect 7.1 is only certified against **BO4.3SP2**

➔ Introducing **TeamConnect Global Search Connector 1.0** – a new module aimed at simplifying ElasticSearch upgrades. Before testing the connection between TeamConnect and ElasticSearch, please ensure that you have installed the ElasticSearch Connector module. You can find this module listed under available updates in TeamConnect.

➔ Supports **Websphere Liberty 22.0.0.1**

The following modules are rolled out along with the release, which will require upgrading to ensure compatibility with TeamConnect Enterprise® 7.1.

- **TeamConnect O365 Add-In 4.0**
- **Global Search Connector 1.0**
- **Collaborati Spend Management 7.1**
- **Service of Process (SOP) Manager 7.1**
- **InvoiceIQ 2.0** **(We recommend to upgrade)**

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TeamConnect Enterprise® 7.1

3.   Security Updates

The sections below details security updates within TeamConnect Enterprise 7.1, enhancing both security and performance:

3.1 Library Updates

Category	Old Version	New Version
Networking Libraries	netty-*-.4.1.32.Final.jar	netty-*-.4.1.96.Final.jar
Common Utility Libraries	commons-text-1.9.jar	commons-text-1.10.0.jar
Common Utility Libraries	commons-fileupload-1.4.jar	commons-fileupload-1.5.jar
Web and Framework Libraries	reload4j-1.2.18.4.jar	reload4j-1.2.25.jar
Web and Framework Libraries	rome-*1.18.0.jar	rome-*2.1.0.0.jar
Web and Framework Libraries	rhino-1.7R5.jar	rhino-1.7.14.jar
Security and Cryptography	bcrypt-0.9.0.jar	bcrypt-0.10.2.jar
XML and Data Serialization	xstream-1.4.19.jar	xstream-1.4.20.jar
Common Utility Libraries	guava-31.0.1-jre.jar	guava-32.1.1-jre.jar
Security and Cryptography	bcprov-jdk15on-1.68.jar	bcprov-jdk15on-1.70.jar
Web and Framework Libraries	spring-*-5.3.20.jar	spring-*-5.3.28.jar
Web and Framework Libraries	cxf-*-3.5.0.jar	cxf-*-3.5.6.jar

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Web and Framework Libraries	jackson-*-2.10.5.jar	jackson-*-2.14.1.jar
Data Processing Libraries	poi-*5.2.0.jar	poi-*5.2.3.jar
Web and Framework Libraries	hibernate-*-5.4.32.Final.jar	hibernate-*-5.4.33.Final.jar
Logging Libraries	slf4j-*1.7.36.jar	slf4j-*2.0.7.jar
Logging Libraries	Log4j-api-2.17.1.jar log4j-to-slf4j-2.17.1.jar	Log4j-api-2.18.0.jar log4j-to-slf4j-2.20.0.jar

3.2 Security Fixes

Issue: Session Id is displaying in the logs that can impact security
Tracking Code: SUPPORTPRI-67999
Case number: 2023-0627-7893213
Initial Fix version: TCE 6.3.7 PB 5
Criticality: Low

Issue: Blind XSS vulnerability with text type field and GlobalSearch.
Tracking Code: SUPPORTPRI-66934
Case number: 2023-0306-7701009
Initial Fix version: TCE 6.3.3 Patch 27
Criticality: Low

Issue: TeamConnect vulnerability detected when performing actions using Google Web Toolkit.
Tracking Code: SUPPORTPRI-66990
Case number: 2022-0927-988450
Initial Fix version: TCE 6.2.4 Patch 12
Criticality: Low

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3   Enhancement/Features

Custom Color Profile, TeamConnect Troubleshooting & Debugging Improvements

TeamConnect Enterprises 7.1 introduces several new features, focusing on Custom Color Profile and enhanced Troubleshooting & Debugging Improvements for the better user experience.

These new features of Custom Color Profile introduce new functionalities, eliminating the need for time-consuming tasks like deleting or renaming color profiles. It also includes options for recompiling and uploading improved color profiles, streamlining the entire process. In addition, we have introduced Enhanced Color Profile Administration which provides the usage of CSS variables.

TeamConnect Troubleshooting Improvements introduces the following new features:
- Introduced a new rollover policy called "Rollover by Schedule & Size", enabling users to efficiently manage logs by incorporating both schedule and size criteria.
- Introduced a new feature called the "Rule Auditor", which lists rule failures during execution. This feature aids in diagnosing and resolving issues related to rule failures.
- Introduced new Block Identifiers, enabling users to view both the block name and block key during the rendering of custom blocks. This enhancement helps users identify problematic blocks when diagnosing issues.
- Introduced Notifications for Scheduled Action failures, eliminating the need for manual entry each time a new scheduled action is created. Users can specify an email address during the scheduled action setup to receive notifications if the action fails.
- Introduced a new setting named "Max Search Time for Report", designed as a distinct field to manage the timeout duration for report execution. This prevents any interference or issues with custom search functionality.

Enhancement: New Custom variables must be added to the "DefaultCustomVariables.LESS" file.

Description: A fallback variables import system has been introduced to TeamConnect for LESS files. Any newly introduced variables in future TeamConnect versions & missing variables will not cause problems or breakages with the client's custom LESS file as there will be default values assigned through the import system. For more information, click here.
Tracking Code: TC-42811

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Enhancement: Automatically recompile Custom Color profile .LESS File, when clients upgrade.
Description: When the admin runs the upgrade script, an option is introduced to toggle/control the recompilation process automatically for all the color profiles on initial startup. For more information, click here.
Tracking Code: TC-42810

Enhancement: Separate Max Search Time for Reporting & Custom Search.
Description: Introduced a new field called "Max Search Time for Report" when an admin wants a separate setting in Admin > Admin Settings > Reporting tab > "Max Search Time for Report", to control the timeout for report execution so that it does not interfere with custom search and does not cause problems with custom search. For more information, click here.
Tracking Code: TC-43694

Enhancement: Modify Block Title "Company Settings" on Admin Settings/UserInterface.
Description: The block name "Company Settings" is modified as "Logo Management" For more information, click here.
Tracking Code: TC-44914

Enhancement: On Screen text when user doesn't have permission to document tab.
Description: Users who don't have permission to add documents will not be able to upload a new color profile because those are stored in documents folders. For more information, click here.
Tracking Code: TC-44997

Enhancement: Rule Auditor: Retrieve and display rule failures in New Rule Auditor User Interface.
Description: The user can view the list of rule failures in the Rule Auditor table to diagnose and troubleshoot issues related to rule failures. For more information, click here.
Tracking Code: TC-46024

Enhancement: Access Rolled Over Logs from User Interface.
Description: Users who have access to view logs can now retrieve the last 14 instances of rolled logs from the logging screen.

When estimating file size, values are rounded to the nearest KB/MB. If a user upgrades from a previous version of TCE to TCE 7.1, the last 14 Archived logs are not displayed. For more information, click here.
Tracking Code: TC-45515

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Enhancement: Add Block Identifiers to Logs.
Description: The user can view both the block name and the block key when a custom block is displayed. This feature helps users identify problematic blocks while diagnosing issues related to them. For more information, click here.
Tracking Code: TC-43691

Enhancement: Rule Auditor: Create an entry for Rule Auditor in the Tools dropdown.
Description: Users or administrators can access the Rule Auditor via the Tools dropdown. Clicking on it opens a new tab specific to Rule Auditor, where they can view a list of rule failures and their details. For more information, click here.
Tracking Code: TC-46022

Enhancement: Appenders from TeamConnect in setup should have View Archived logs functionality.
Description: Appenders within TeamConnect feature the "View Archived Logs" functionality, but this capability is not available for external appenders. Specifically, external appenders such as those loaded via documents, SMTP, Socket, and CSM do not support the "View Logs" feature.
Additionally, only the File Appender includes the "View Archived Logs" functionality. For more information, click here.
Tracking Code: TC-45978

Enhancement: Create a new CSM (Collaborati spend Management) logger and Integration Logger.
Description: Users have the ability to configure the CSM log independently from the Rule logger or any other logger. This configuration allows them to debug rules or other logger issues without CSM cluttering the logs with unnecessary information. Starting from TeamConnect Enterprise version 7.1, CSM logging will be directed to the Integration Logger.

It's important to note that upgrading to CSM 7.1 will require an upgrade to TCE 7.1. For more information, click here.
Tracking Code: TC-43693

Enhancement: In My Approvals page, display spinner text when switching between freeze / unfreeze options.
Description: As the user toggles between the freeze and unfreeze header options, a spinner and accompanying text will appear while the My Approvals page loads. For more information, click here.

Tracking Code: TC-48006

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Enhancement: In the Invoice page, display spinner text when switching between freeze/ unfreeze options.
Description: When the user switches between the freeze / unfreeze header options, the spinner and text will be displayed as the page loads in the Invoice page. For more information, click here.
Tracking Code: TC-47443

Enhancement: Scheduled Actions: To send notification when scheduled actions job fails.
Description: Users can provide an email address when creating a scheduled action, allowing them to receive notifications in case the scheduled action fails. For more information, click here.
Tracking Code: TC-44912

Enhancement: Default email Setting for scheduled actions email notification.
Description: Users can set a default email address for scheduled actions, eliminating the need to manually enter their address each time they create a new scheduled action. Once this setting is configured, the email address field will automatically be filled with the default address when the user accesses the scheduled actions page. For more information, click here.
Tracking Code: TC-46807

Enhancement: Enabling "Clearlog" and "Rollover" hyperlink for the Option "Rollover by size and schedule" in File Appender type.
Description: The user can enable the "Roll Over" and "Clear Log" options in the File appender type in the Setup while choosing "Roll over by size & schedule", so that they can perform the required actions. For more information, click here.
Tracking Code: TC-49213

Enhancement: If the file name includes "/" or"\", then a new directory is created which is being skipped in the archived logs for File appender.
Description:If the user includes special characters like "/" or "\" in the file name within the file appender, folders can be viewed in the archived popup. The contents of the subfolders created under the file name (which includes rolled-over logs) will also appear in the archived logs popup. Users can download these contents as a zip file. For more information, click here.
Tracking Code: TC-48547

Enhancement: Invalid special characters in the file appender name.
Description: Avoid using the following special characters in the file name when navigating to Setup > System Settings > System Appender > File Appender Information > File Name.

/ ! @ # $ % ^ & ( ) + _ - = { } [ ] | : ' " , ? ` ~; ' " , ?

For more information, click here.
Tracking Code: TC-48882

Improvement: Hover over Copy & Close in the title attribute.
Description: Users can hover the mouse over the title icon of the "View Details" popup for a specific rule failure. This action allows the user to copy or close the popup using the icon's clear and explicit information. For more information, click here.
Tracking Code: TC-48972

Custom Search Updates

This release address the following Improvements/Enhancements for Custom Search Management in TeamConnect:

- Improvised custom search and search view management by empowering users to categorize their searches into folders, offering a more personalized and organized experience.
- Empower administrators to produce and distribute replicas of personalized searches through search views, incorporating filtering options such as "All of the following," "Any of the following," and "Group the following."
- Allow administrators to adjust the order of group-assigned search views on the user interface directly from the setup window.
- Enhanced the user interface block for assigning search views to groups, enabling administrators to easily unsubscribe search views for a specific group of users directly from the setup window.

Enhancement: Label changes to Manage Collections screen.
Description: In TeamConnects Manage Collections section the user interface for Projects, Contacts, Accounts, Invoices, Appointments, Tasks, Documents, Expenses, and History objects has been updated. The <Object> Manage Collections, Object Collections (Pagination label), and Manage List header all these labels are updated to Manage Searches.
Tracking Code: TC-43992

Improvement: New users should not be subscribed to all the search views.
Description: When an admin creates a new user, the user is automatically subscribed only to the search views assigned to their user group. This will save admins time by eliminating the need to manually unsubscribe search views that are not relevant to the user.
Tracking Code: TC-46679

Enhancement: The ability to manage Custom Searches along with Search View Collections on the Manage Collections pages for each object.
Description: A new user interface block called "Manage Custom Searches" has been introduced on the Manage Collections screen. This block includes buttons for creating a new folder and moving items, along with a table displaying Custom Searches, featuring a fixed column.

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Tracking Code: TC-40810

Enhancement: Populate Custom Search Data and Folders for Contacts Manage custom search block**.**
Description:

- Upon opening the Manage Custom Searches screen, users will see a list of saved Custom Searches and Folders specifically created for the Contact object.
- The saved custom searches are presented in a table format, featuring columns for Order, Name, Description, and Created on.
- Folders are displayed above the custom searches. In case of identical order values, both folders and custom searches are sorted alphabetically.

Tracking Code: TC-39172, TC-43951

Enhancement: Implement breadcrumb component for Contact's Manage custom search block.
Description: User interface elements such as location breadcrumbs are now positioned beneath the button bar within the Manage Custom Search block. These breadcrumbs indicate the folder levels users are navigating.
All breadcrumbs are clickable links; selecting one redirects users to the corresponding folder location. The folder locations are indicated by right-pointing double angle quotation marks.
Tracking Code: TC-44148

Enhancement: Update Contact Save Search dialog to include a description & folder selection.
Description: The Save Search header is now labeled as Search Information, the Save as field is renamed as Name, and the Save button is modified to Save Search.
Tracking Code: TC-40851

Enhancement: Allow users to enter description for Contact's search views**.**
Description: A memo field has been incorporated into the search view across all objects on the TeamConnect Setup screen. Users have the option to add or modify the description for a search view; it's not mandatory. If a user exceeds the character limit (2000 characters) in the description field, an error message will appear on the screen. Any added or updated descriptions will be stored in the database, and the changes will be reflected in the description field of the Manage Custom Search block.
Tracking Code: TC-44971

Enhancement: Implement unsubscribe button for Manage Collections.
Description: In the Manage Collections block for TeamConnect objects, a new checkbox column and an Unsubscribe button have been introduced. Initially disabled, the Unsubscribe

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button becomes active once the user selects the corresponding checkbox in the grid. Clicking the Unsubscribe button will remove the user from the selected search view.
Tracking Code: TC-44122

Enhancement: Add Allow unsubscribe column on Manage collections table.
Description: In the Manage Collections table, a new column titled "Allow UnSubscribe" has been introduced. Users can now ascertain their ability to unsubscribe from search views based on the value in this column. If the "Allow Subscribe" column is marked as Yes, it indicates that the selected search view and address book have been manually subscribed. Search views subscribed to a group will display No in the "Allow Subscribe" column.
Tracking Code: TC-48031

Enhancement: User Interface changes to design of group assignment of search views in the setup search views pages.
Description: Admins previously faced challenges in identifying which search views were assigned to specific groups. This issue has been addressed through the introduction of a new User Interface block on the search view screen. When admins choose the object collections option on the Search Views screen, a new block appears at the page's bottom. It disappears if the administrator deselects it.
Within this block, admins can assign and unassign search views for user-related groups. Additionally, admins can check the assignment status of search views (Yes or No) to user groups in the Assigned column of the tables.
Tracking Code: TC-47105, TC-46682

Enhancement: Reminder for admins to save their changes.
Description:

- A new reminder added above the Object Collection Group Assignment section that states, "*Please save the above changes before attempting to Assign/Unassign in the Object Collection Group Assignment section*".
- The provided reminder enables admins to save changes and avoid receiving error messages when assigning a group without saving. If an admin tries to assign a group that is already assigned, an error message will be displayed.

Tracking Code: TC-47294

Enhancement: Add All of the following, Any of the following and Group the following in search view in the Search qualifiers in the setup search views pages.
Description: A new Group field is now available in the Search Qualifiers table on the TeamConnect setup page, allowing administrators to assign distinct groups for search qualifiers. When administrators choose the "Group the Following" option while adding the search qualifier,

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an empty Group field appears in the table; it vanishes when any other option is selected.
If administrators input a value outside the range of 1-9 or 0 in the Group field during the addition or editing of a search qualifier, an error message will be displayed.
At the top of the Search Qualifiers table, administrators can choose from three radio options.There are

- All of the following
- Any of the following
- Group the following

Tracking Code: TC-47536

Enhancement: Add "Group" field on the filter criteria for users on the User Interface.
Description: The user interface for the Search view has been updated by adding the Group field to the filter criteria. This group field will display when the user selects "Group the following" as logic on the user interface.
If "Any of the Following" or "All of the Following" is chosen as the logic, the group field will disappear on the user interface. On the search views screen, users will not be able to modify the Group field value.
Tracking Code: TC-47537

Enhancement: Testing of Duplicate field validation in "All of the following" criteria in filters.
Description: If admins choose "All of the following" on the search filters screen and add duplicate fields, they will encounter an error message. However, if they select both "All of the following" and "Group the following" in the search filters and add, edit, or delete duplicate or existing fields, no error messages will be displayed. When users perform the search, the results will be generated based on the settings configured by admins, even if there are duplicate fields.
Tracking Code: TC-48212

Enhancement: On Contacts Object Cascade unsubscribe from setup for admins.
Description: If a user lacks the necessary system rights to unsubscribe from a search view, the administrator must handle the unsubscription process by selecting the user group. If an admin removes a group assignment from the search view, this action will affect all users within that group, impacting both individual user and group-level entries.
Tracking Code: TC-48205

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Outlook Add-in Updates

This release address the following improvements/Enhancements of TeamConnect O365 Add-In 4.0:

➔ **Email and Communication:** The Add-in facilitates efficient tracking and organization of emails related to matters and documents within TeamConnect.

➔ **Calendar Integration:** A standout feature is the synchronization of appointments between Outlook and TeamConnect, ensuring that all schedules are up to date.

➔ **Document Handling:** Users can access and manage TeamConnect documents without leaving the Outlook interface.

➔ **User-Friendly Interface:** The Add-in offers an intuitive and user-friendly interface for quick and easy access to TeamConnect data.

➔ **Enhanced Efficiency:** The integration eliminates the need to switch between applications, saving time and promoting effective collaboration.

Kindly go to TeamConnect 0365 Add-In Help to access the respective guides in the Client Success Center.

For those managing appointments in TeamConnect, the Outlook Add-in is a powerful ally. It streamlines the process of scheduling, tracking, and managing appointments, ensuring that your calendar stays in sync with your TeamConnect data. For more information on appointments, refer to the End User Guide.

Overall, the TeamConnect Outlook Add-in offers a robust solution for legal professionals and others looking to optimize their workflow and maximize the benefits of the TeamConnect platform.

Note:

Appointments

For users not currently using appointments in the plugin, you can upgrade now! Appointments are available in the new Add-in.

For users who rely on Appointments in the Plug-in (legacy Outlook integration), appointment migration will not be available until **May 2024** (target release date), please wait until then to upgrade.

Tasks

Tasks will not be available in the new Outlook Add-in **until November 2024**. If you rely on tasks with the legacy plugin or simply wish to start using them, please schedule your upgrade after the November 2024 release (target release date).

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Idea Portal

The following feature ideas are taken from **Idea portal** or direct client feedback. We have implemented these ideas in the TCE 7.1 release:

Enhancement: In the TeamConnect O365 Add-In 4.0, an option to rename the file or upload as a version of an existing file in the duplicate detection error (Covers Copy & Paste in same folder).

Description: When a user uploads a file via the TeamConnect O365 Add-In 4.0, the system checks for duplicates. If the same file name is found in the destination folder, it prompts the user with three options: rename the file, upload as a new version, or cancel.

If multiple files are uploaded, the user can choose to copy or upload as new versions when duplicates are detected. The system also updates file details like version number, modified date, and user information accordingly.

Tracking Code: TC-39625

Enhancement: New Default Log Rollover policy in Setup.

Description: The user can access a new Rollover Policy called "Rollover by Schedule and Size" in the setup screen under the "File Appender Section" dropdown. For more information, click here.

Tracking Code: TC-43696

Enhancement: Modify Log Roll over policy.

Description: When a user selects 'Rollover by Schedule and Size' option for either a new appender or any existing appender, the logs must roll over if the size of the current logs exceeds the value in the max. filesSize (MB) field OR if the backup schedule condition is triggered (whichever condition is triggered first). For more information, click here.

Tracking Code: TC-45691

Enhancement: Clear & Rollover Options.

Description: In the Admin Settings section, specifically under Logging > System Appenders and Audit Appenders, users have the option to either "Clear" the log instantly or "Rollover" it based on the specified policy regarding size and schedule.

This enables users to either delete the log immediately by clicking "Clear" or preserve it and delete it later by choosing "Rollover." For more information, click here.

Tracking Code: TC-45699

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Enhancement: Ability to recompile existing color profiles uploaded from the "Upload Color Profile" button.
Description: Users can reupload existing color profiles now. After reuploading, the user needs to refresh their browser cache by "ctrl+shift+r" and the older color profile will not be retained as a version. The newly uploaded color profile will override the previous color profile. For more information, click here.
Tracking Code: TC-44472

Enhancement: Create a new button that triggers recompilation on the Admin / User Interface page.
Description: If a user makes any additional changes to existing color profile, a new button called "Recompile" is provided to recompile that modified color profile thereby eliminating the existing cumbersome process of deleting profile or renaming it. For more information, click here.
Tracking Code: TC-42932

Enhancement: Option to Recompile All existing Color Profiles.
Description: For recompiling multiple files at once, the user will be provided with an option to choose "ALL" in the "Recompile Color Profiles" dropdown. For more information, click here.
Tracking Code: TC-43396

Enhancement: Dialogue popup for "Recompile All" and improved banner message.
Description: When an admin initiates a recompile all process, a dialogue box with a warning appears as "Recompiling all color profiles may take a few minutes. You will not be able to perform any action during the recompilation process. Are you sure you want to proceed?" with the options to "Recompile All" and "Cancel" buttons. For more information, click here.
Tracking Code: TC-44570

Enhancement: Download Archived Logs under Admin>Logging>System Appenders.
Description: When the user selects the download option, the corresponding log will be saved. For existing users utilizing specific scripts to archive their logs, the log file name will be modified to the formats mentioned below.

Example File Name for Rollover by Size & Schedule: **system.log.2023-02-24.1768987654234**

Example File Name for Rollover by Schedule: **system.log.2023-02-24**

Example File Name for Rollover by Size: **system.log.1**

Tracking Code: TC-45692

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Enhancement: User Interface for creating a New Folder in Contacts Manage Searches and Manage Collections block.
Description: In the Manage Custom Searches and Manage collections block, New Folder button has been added to the user interface. When the user clicks on the New Folder button a dialog box will appear with two input boxes named as Name and Description with Create Folder and Cancel buttons on the screen.
Tracking Code: TC-40953, TC-44945

Enhancement: Allow users to arrange saved folders, Custom Searches, and Search Views in any order they choose on Contacts Manage Custom Searches and Manage Collections block.
Description: Users can change the value of the order by entering a numeric value in the order field and then clicking the "Update" button in the header.

Searches and folders are sorted in accordance with the updated order value when users update the order value. Notably, they are sorted alphabetically if the order value is the same.
Tracking Code: TC-39179, TC-44959

Enhancement: User Interface for Contacts Move Button popup.
Description: When a user clicks the Move button, a popup with a drop-down menu will display on the screen, which allows users to choose the folder to which custom searches or search views should be relocated.
This popup will include interface elements such as Folder, Description, Move, and Cancel. Clicking the Move or Cancel buttons will close the popup and take the user back to the previous screen.
Tracking Code: TC-44097

Enhancement: Move Contacts custom searches and search views inside folders.
Description: Users can relocate saved Custom Searches or search views between folders by choosing the folders in the table and clicking the Move button. When a user selects a custom search, the initially disabled Move button becomes active. Upon clicking it, a popup with a drop-down menu appears, allowing users to pick the destination folder for the custom searches.
Tracking Code: TC-39177

Enhancement: Move Contact Custom searches and search views back to root level.
Description: Users can choose to either Remove from Folder or Move saved searches/views from saved folders to root-level folders. Clicking on the "Remove from Folder" button prompts a warning box with "Confirm" and "Cancel" options. After user confirmation, the selected saved search is removed and transferred back to the Root folder. Upon successful relocation, a

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confirmation message will be displayed on the screen.
Tracking Code: TC-44247, TC-44947

Enhancement: User Interface update for Contact's Manage Custom Search Action column.
Description: The Manage Custom Searches and Collections table is enhanced by introducing an Action Column on the Manage Searches screen. Within this column, there are two icons representing custom searches and folders (Edit Info, Delete). Hovering over these icons triggers tooltips to appear on the screen. Notably, the Action column is visible only at the root level and remains hidden within folders.
Tracking Code: TC-40952, TC-45217

Enhancement: Allow users to delete on Contact Manage Custom Searches and Manage Collections block.
Description: Within the Contacts Manage Searches screen, users have the option to delete saved Custom Searches and folders. Clicking the Delete button in the action column prompts a pop-up window to appear, offering options Yes and No. Once confirmed by the user, the deletion will be carried out, and a success message will be displayed on the screen after the process is successfully completed.

When a user deletes a folder containing Custom searches, all the searches within the folder are deleted.

When a user deletes a folder containing search views, all the search views are moved to the Root level.
Tracking Code: TC-45097, TC-39175

Enhancement: Enhance search management for all the objects in TeamConnect.
Description: The improved search management for Custom Searches now covers all objects within TeamConnect. On the <Object> Manage Searches page, users will find the Manage Custom Search and Manage Collections blocks, showcasing existing custom searches and views for all TeamConnect objects.
Users can perform various actions such as creating new folders, editing, moving, deleting, subscribing, unsubscribing, and updating the order for search views and custom searches.
Additionally, the breadcrumb components allow users to navigate back to the root folder from any level where they are working.
Tracking Code:
TC-40955,TC-45135,TC-40958,TC-40962,TC-40956,TC-40960,TC-40961,TC-40957, TC-40959

Enhancement: Revise the user interface located on the left navigation panel for the objects within TeamConnect.
Description: The user interface on the Objects left navigation panel has been enhanced. Changes made to the Manage Custom Search and Manage Collections block will now be visible

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on the Objects Left Navigation Panel, featuring both collapse and expand options. Folders are consistently displayed above searches and views.

All the folders/searches are clickable. When a user clicks on Folder, it is either expanded or collapsed. When a user clicks on search/view it is executed. The selection by the user will be highlighted on the left nav menu.

Tracking Code: TC-39220, TC-46962

Enhancement: Allow users to edit on contacts Manage Custom Searches and Collections blocks.

Description: On Contacts Manage Searches screen, users can edit the saved Custom Searches, Search Views, and folders. Clicking the edit icon in the action column opens a popup window titled "Update Information." Within this popup, users encounter two editable fields: Name and Description, alongside two buttons, labeled "Update Info" and "Cancel."

To update information, users can click the "Update Info" button, which will change the modified date to the current date and show the updated details on the screen. Upon successful update, a confirmation message will be displayed.

Tracking Code: TC-39222, TC-44955, TC-47433

Enhancement: Contact's Order propagation from setup to Manage collections.

Description: In the Object Definitions screen, the order value set by administrators during the setup of Search Views will be carried over to the order value Contact's object definition setup screen.

- The Manage Collections table will display the default order value of a search view when users manually unsubscribe from the view.
- When the user updates the order value for the search views on the Manage collections table, the order value will be updated and the search views are arranged in accordance with the updated order value.
- By selecting any specific copy of group assigned search views and clicking on Unsubscribe button, the group assigned search views can be unsubscribed and the order value in the table will be default to the value set by the admins.
- The order value will be reset to zero when users move the search views into a new folder.

Tracking Code: TC-48533

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4   Resolved Issues

The following items have been resolved in the TeamConnect Enterprise® 7.1 release. Each issue is documented in the following format:

- A description of the issue
- Internal tracking code
- Case number, if applicable
- Initial fix version

Issue: Issue with qualifier of Custom Action Rule where a warning message is displayed if "Billing End Date" is greater than "X" days
Tracking Code: TC-45291
Case number: 2019-0116-500920

Issue: Audit Rule triggers an Error which states it is an Approval Rule.
Tracking Code: TC-45288
Case number: 2018-0412-444680

Issue: When recovering a session and attempting to create and save an involved party object, a null pointer popup occurs.
Description: A null pointer popup error occurs when attempting to create and save an involved party child object. However, "recover session" does not allow the user to create anything in setup. It will, however, allow users to delete without issue.

When opting to recover the session, the Teamconnect session's client session is getting invalidated and the unit of work is treated as null. The user needs to update the new unit of work and the client session to the old Teamconnect session.
Workaround: The user must log out and then log back in to begin a new session.
Tracking Code: TC-44982
Case number: 2018-0613-457849

Issue: Invoice Route Details not getting Loaded from Action Tab.
Tracking Code: TC-45013
Case number: 2017-1205-417846

Issue: Invoice > Interactive Line Items > Inconsistent scrollbar within a scrollbar for certain line items that contain Warnings.
Tracking Code: TC-48923
Case number: 2023-0815-7949408

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Issue: Inactive users in workflow receive email notifications.
Tracking Code: SUPPORTPRI-65908
Case number: 2021-1005-840063

Issue: When a checked-out document triggers the deletion expiration approval, the system attempts to delete it every minute, resulting in continuous failures until the system crashes.
Tracking Code: SUPPORTPRI-55385
Case number: 2020-0427-601033

Issue: Block Type Ahead and Hidden Field Interaction functionality using Screen Designer is not functioning correctly.
Tracking Code: SUPPORTPRI-51783
Case number: 2019-0925-555938

Issue: Adjustment message on line item always displays word 'Discount' when the Amount is being adjusted.
Tracking Code: SUPPORTPRI-43910
Case number: 2018-1003-480800

Issue: Parametrized Scheduled Action Issue - Only one checkbox is being displayed after selecting the .class file in Automated action.
Tracking Code: SUPPORTPRI-44987
Case number: 2018-0607-456348

Issue: Invoice Sorting issue in 4.0 API.
Tracking Code: SUPPORTPRI-35824
Case number: 2018-0212-431572

Issue: Line Item Bulk Adjustment screen - Reason for Adjustment' is populated with 'Other' instead of '(Select)'.
Tracking Code: SUPPORTPRI-35773
Case number: 2018-0201-429434

Issue: Invoice custom search on matter/dispute field adds label for search on all projects.
Tracking Code: SUPPORTPRI-27543
Case number: 2016-1208-292721

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

Issue: ArithmeticException: Error encountered - / by zero while adjusting the Invoices using Invoice header.
Tracking Code: SUPPORTPRI-65739
Case number: 2022-1007-993719
Initial Fix version: TCE 6.3.3 Patch 24

Issue: Validation rule does not work with groupMembership.group. UniqueKey 'is/not begins with' qualifier.
Tracking Code: SUPPORTPRI-65280
Case number: 2022-0718-959344
Initial Fix version: TCE 6.3.5 Patch 19

Issue: Security rules when evaluating against an assignee list, do not evaluate correctly.
Tracking Code: SUPPORTPRI-65031
Case number: 2022-0524-933898
Initial Fix version: TCE 6.3.5 Patch 19

Issue: All day appointments cannot be changed by users in different time zones.
Tracking Code: SUPPORTPRI-65503
Case number: 2021-1209-867647
Initial Fix version: TCE 6.3.5 Patch 19

Issue: Within the Invoices section, when users attempt to make adjustments by calculating a percentage of the original amount and reducing it accordingly, there are instances of rounding issues. These issues lead to incorrect 'Adjustment' amounts displayed in the Invoice Summary.
Tracking Code: SUPPORTPRI-65679
Case number: 2022-0902-979452
Initial Fix version: TCE 6.3.6 Patch 6

Issue: Document Templates not populating Involved Party Addresses, Company information.
Tracking Code: SUPPORTPRI-62970
Case number: 2021-0920-833368
Initial Fix version: TCE 6.3.6 Patch 6

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Issue: Email Notifications being sent to Inactive users.
Tracking Code: SUPPORTPRI-62590
Case number: 2021-1005-840063
Initial Fix version: TCE 6.3.6 Patch 6

Issue: In TeamConnect, there is an issue related to cache corruption where Matter Assignees disappear temporarily. When they reappear, there's an additional problem: no Primary Assignee is selected.
Tracking Code: SUPPORTPRI-65517
Case number: 2021-0525-785062
Initial Fix version: TCE 6.3.3 Patch 23

Issue: Performance improvements for Custom Search.
Tracking Code: SUPPORTPRI-65678
Case number: None
Initial Fix version: TCE 6.3.6 Patch 5

Issue: Documents being uploaded on object records getting certain characters renamed.
Tracking Code: SUPPORTPRI-65446
Case number: 2022-0830-977074
Initial Fix version: TCE 6.3.6 Patch 5

Issue: Exporting search results gives error for currency field in involved party of the dispute.
Tracking Code: SUPPORTPRI-65460
Case number: 2022-0822-973837
Initial Fix version: TCE 6.3.6 Patch 5

Issue: Instance was too slow while approving Invoices & loading Reports.
Tracking Code: SUPPORTPRI-65215
Case number: 2022-0726-962591
Initial Fix version: TCE 6.3.5 Patch 15

Issue: Manual invoices are not visible after renaming the rejected ones.
Tracking Code: SUPPORTPRI-65160
Case number: 2022-0722-961433
Initial Fix version: TCE 6.3.6 Patch 4

Issue: Unable to view logs from a different node when running a clustered setup.

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Tracking Code: SUPPORTPRI-65168
Case number: 2022-0705-954620
Initial Fix version: TCE 6.3.4 Patch 4

Issue: Values in Matter Number Column Vanishes during Mass Edit.
Tracking Code: SUPPORTPRI-64895
Case number: 2022-0715-958993
Initial Fix version: TCE 6.3.3 Patch 21

Issue: ElasticSearch - Normal user runs into system error when resulting records have secured fields.
Tracking Code: SUPPORTPRI-64899
Case number: 2022-0602-937745
Initial Fix version: TCE 6.3.3 Patch 21

Issue: Interactive line item date and legacy date filter formats are different.
Tracking Code: SUPPORTPRI-65219
Case number: 2022-0624-950786
Initial Fix version: TCE 6.3.3 Patch 21

Issue: Invoice - Recently Viewed throws system error when containing GBP invoices and sorted on Invoice Total.
Tracking Code: SUPPORTPRI-60348
Case number: 2021-0209-730772
Initial Fix version: TCE 6.3.3 Patch 21

Issue: History is not created in parent object after selecting history location as parent in audit rule.
Tracking Code: SUPPORTPRI-65189
Case number: 2022-0331-911438
Initial Fix version: TCE 6.2.6 Patch 14

Issue: The Category is not updating while changing the default role.
Tracking Code: SUPPORTPRI-63579
Case number: 2021-1006-840562
Initial Fix version: TCE 6.3.6 Patch 14

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

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Tracking Code: SUPPORTPRI-63245
Case number: 2021-1109-856034
Initial Fix version: TCE 6.2.6 Patch 14

Issue: User is unable to create an involved party for the child objects in the setup.
Tracking Code: SUPPORTPRI-64880
Case number: 2022-0502-924501
Initial Fix version: TCE 6.3.6 Patch 3

Issue: Document with Special Character 'Ä ' is having the file name truncated when the file is downloaded.
Tracking Code: SUPPORTPRI-64889
Case number: 2021-0401-762178
Initial Fix version: TCE 6.3.5 Patch 13

Issue: When user timezone differs from application / database, batch display component TZD and TZI dates change after being entered.
Tracking Code: SUPPORTPRI-63559
Case number: 2020-1202-703135
Initial Fix version: TCE 6.3.5 Patch 13

Issue: Invoice Line Item Validation does not work on Interactive Line Item.
Tracking Code: SUPPORTPRI-64433
Case number: 2022-0519-931919
Initial Fix version: TCE 6.3.3 Patch 20

Issue: Records displayed in Embedded object screens are limited by admin search results.
Tracking Code: SUPPORTPRI-63859
Case number: 2022-0408-915145
Initial Fix version: TCE 6.2.8 Patch 4

Issue: Custom Involved Party Search View Shows Incorrect Results in Printable View.
Tracking Code: SUPPORTPRI-63159
Case number: 2022-0125-883263
Initial Fix version: TCE 6.2.8 Patch 4

Issue: 'View Scheduled Actions Folder' button not navigating to the Scheduled Actions folder.
Tracking Code: SUPPORTPRI-64735

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Case number: 2022-0615-947622
Initial Fix version: TCE 6.3.6 Patch 2

Issue: The presence of bad records within the Y_RECORD_CHANGE table halts all indexing processes until the table is truncated.
Tracking Code: SUPPORTPRI-64639
Case number: 2022-0418-918497
Initial Fix version: TCE 6.3.3 Patch 20, TCE 6.2.8 Patch 6

Issue: REST API pulls DMS passwords in JSON Payload.
Tracking Code: SUPPORTPRI-64821
Case number: 2022-0427-922484
Initial Fix version: TCE 6.3.6 Patch 2

Issue: Custom Search does not Filter by Category.
Tracking Code: SUPPORTPRI-63717
Case number: 2022-0228-897675
Initial Fix version: TCE 6.2.5 Patch 8

Issue: Ad Hoc Expired Workflows Can't Be Restarted.
Tracking Code: SUPPORTPRI-61582
Case number: 2021-0604-789207
Initial Fix version: TCE 6.2.8 Patch 1

Issue: Inefficient method usage by Budget Creation Tool crashes TeamConnect.
Tracking Code: SUPPORTPRI-66179
Case number: 2022-1104-1005092
Initial Fix version: TCE 6.2.2 Patch 13

Issue: TimeZone Independent fields, when rendered on a custom screen using the tc:date tag, are getting shifted by the user's timezone.
Tracking Code: SUPPORTPRI-63108
Case number: None
Initial Fix version: TCE 6.3.3 Patch 12

Issue: Task/Expense codes are not deactivated after deselecting the checkboxes.
Tracking Code: SUPPORTPRI-62637
Case number: 2021-0831-825630

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Initial Fix version: TCE 6.3.4 Patch 2

Issue: System Error is displayed while navigating to Global Search Page for a user with rights to only a few objects.
Tracking Code: SUPPORTPRI-64652
Case number: None
Initial Fix version: TCE 6.3.7

Issue: SystemSearchField("approvalStatus", ApprovalStatus.class, EnterpriseEntity.class) not correct - approvalStatus is not correct.
Tracking Code: SUPPORTPRI-63770
Case number: 2022-0308-901582
Initial Fix version: TCE 6.3.7

Issue: Auto Populate Feature Missing for custom object search module.
Tracking Code: SUPPORTPRI-63525
Case number: 2022-0228-897405
Initial Fix version: TCE 6.3.3 Patch 13

Issue: Can't export embedded object search results
Tracking Code: SUPPORTPRI-64060
Case number: 2021-1129-862880
Initial Fix version: TCE 6.3.3 Patch 15

Issue: Object with zero records when indexed showing as 'Indexing failed' instead of '0'
Tracking Code: SUPPORTPRI-62611
Case number: 2021-0917-832397
Initial Fix version: TCE 6.3.3 Patch 13

Issue: Requester not listed properly when submitting workflow for Documents
Tracking Code: SUPPORTPRI-62576
Case number: 2021-0505-776572
Initial Fix version: TCE 6.2.8 Patch 1

Issue: Object validation error on adding a contact to embedded object record that has private contact relations.
Tracking Code: SUPPORTPRI-62475
Case number: None

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Initial Fix version: TCE 6.2.8

Issue: In audit rule, when the location is saved in the parent object it is not saving.
Tracking Code: SUPPORTPRI-64030
Case number: 2022-0331-911438
Initial Fix version: TCE 6.2.8 Patch 3

Issue: A non-admin user can access the audit logs by utilizing the CSRF token from the admin user's audit logs.
Tracking Code: SUPPORTPRI-63232
Case number: 2022-0201-885776
Initial Fix version: TCE 6.2.6 Patch 12

Issue: Null message while canceling the item in lookup table
Tracking Code: SUPPORTPRI-62710
Case number: 2021-1028-851333
Initial Fix version: TCE 6.2.6 Patch 12

Issue: Dropdown List Admin Setting Breaks Multi-select fields.
Tracking Code: SUPPORTPRI-61526
Case number: 2021-0803-813722
Initial Fix version: TCE 6.2.8 Patch 3

Issue: CSM Settings > Clearing Filter on Firm, Office Tab is redirecting user to Connection Tab.
Tracking Code: SUPPORTPRI-59982
Case number: None
Initial Fix version: TCE 6.3.2

Issue: Maintenance Notification pop-up window is not displayed.
Tracking Code: SUPPORTPRI-57290
Case number: None
Initial Fix version: TCE 6.2.6

Issue: Updating any of the fields triggers false updates on the Multi-Value list field.
Tracking Code: SUPPORTPRI-56721
Case number: 2020-0915-637582
Initial Fix version: None

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Issue: Session Time out Confirmation Pop-up is not occurring as expected when the page is idle.
Tracking Code: SUPPORTPRI-64309
Case number: 2022-0425-921015
Initial Fix version: TCE 6.3.6 Patch 1

Issue: Trying to save a search view with condition "Has no value", it is changing to "is" automatically.
Tracking Code: SUPPORTPRI-64152
Case number: 2022-0425-920840
Initial Fix version: TCE 6.3.6 Patch 1

Issue: Post commit Rule is triggering twice.
Tracking Code: SUPPORTPRI-64129
Case number: 2022-0223-895879
Initial Fix version: TCE 6.3.6 Patch 1

Issue: Error Notification sent when Invoice Approval route has missing stops.
Tracking Code: SUPPORTPRI-63550
Case number: 2022-0301-898511
Initial Fix version: TCE 6.3.5 Patch 5

Issue: Changing Line item from Fee to expense or vice versa for manual invoices does not reflect in invoice summary.
Tracking Code: SUPPORTPRI-62706
Case number: 2021-1208-866797
Initial Fix version: TCE 6.3.6 Patch 1

Issue: Session Id is displaying in the logs that can impact security
Tracking Code: SUPPORTPRI-67999
Case number: 2023-0627-7893213
Initial Fix version: TCE 6.3.7 PB 5

Issue: Additional approver is unable to adjust line items.
Tracking Code: SUPPORTPRI-67529
Case number: 2023-0525-7855881
Initial Fix version: TCE 6.3.7 PB 5

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Issue: An error occurred when updating the invoice on a custom field adjustment with key 0 that was not found
Tracking Code: SUPPORTPRI-67593
Case number: 2023-0404-7734977
Initial Fix version: TCE 6.3.3 Patch 28

Issue: Application allowing storing and executing cross-site scripting payload.
Tracking Code: SUPPORTPRI-67636
Case number: 2023-0516-7845637
Initial Fix version: TCE 7.0 PB3

Issue: Accessibility resolutions for back to top button and Error/Warning messages.
Tracking Code: SUPPORTPRI-67287
Case number: None
Initial Fix version: TCE 6.3.4 Patch 11

Issue: Custom Approval Route / Conditions not being handled properly when client updates certain matter assignees.
Tracking Code: SUPPORTPRI-67480
Case number: 2023-0510-7839120
Initial Fix version: TCE 6.3.7 PB 4

Issue: Audit History showing Salt values on Contact Card when password is changed.
Tracking Code: SUPPORTPRI-67458
Case number: 2023-0512-7842050
Initial Fix version: TCE 6.3.5 Patch 27

Issue: Adjustment reason is not displaying correctly in the process of editing the Line Items.
Tracking Code: SUPPORTPRI-67462
Case number: 2022-0222-894807
Initial Fix version: TCE 6.3.7 PB 4

Issue: Budget screen does not show when english canada locale is used.
Tracking Code: SUPPORTPRI-67466
Case number: 2023-0425-7770347
Initial Fix version: TCE 7.0 PB 3

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Issue: InvokeBlockAction is not working and renders a blank page.
Tracking Code: SUPPORTPRI-67351
Case number: 2023-0404-7735289
Initial Fix version: TCE 7.0 PB 2

Issue: API Rest Error Message 500 when assignee role has child category.
Tracking Code: SUPPORTPRI-67181
Case number: None
Initial Fix version: TCE 6.3.7 PB 3

Issue: Clear Filter button should be displayed as Clear Filter results.
Tracking Code: SUPPORTPRI-67295
Case number: 2023-0412-7744201
Initial Fix version: TCE 7.0 PB 3

Issue: When using a search view with a custom field pointing to another object, a system error occurs.
Tracking Code: SUPPORTPRI-67299
Case number: 2023-0207-7649415
Initial Fix version: TCE 6.3.4 Patch 11

Issue: Select 'All' box on the custom route sequence doesn't actually select any boxes or deselect all of the boxes.
Tracking Code: SUPPORTPRI-67269
Case number: 2023-0412-7744442
Initial Fix version: TCE 7.0 PB 3

Issue: Application endpoints do not respect user lockout, allowing for brute force attacks.
Tracking Code: SUPPORTPRI-67224
Case number: 2023-0403-7733592
Initial Fix version: TCE 6.3.7 PB 3

Issue: Unable to see 'Clear Logs' link on setup under 'System Appenders' page.
Tracking Code: SUPPORTPRI-67198
Case number: 2023-0309-7705544
Initial Fix version: TCE 7.0 PB 2

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Issue: Custom Search still displaying ERROR level logs despite the logger being set to FATAL.
Tracking Code: SUPPORTPRI-67307
Case number: 2023-0222-7688494
Initial Fix version: TCE 6.3.5 Patch 27

Issue: Invoice approval issue with invoices with more than 1000 line items.
Tracking Code: SUPPORTPRI-67041
Case number: 2023-0404-7734879
Initial Fix version: TCE 6.3.5 Patch 27

Issue: Invoice workflow condition is not working where active assignees (on matter) approval limit is compared to a custom field in invoice.
Tracking Code: SUPPORTPRI-67045
Case number: 2023-0316-7714315
Initial Fix version: TCE 6.3.5 Patch 23

Issue: Issue with global search/custom field permissions for Normal User with no view rights to custom field.
Tracking Code: SUPPORTPRI-66960
Case number: 2023-0207-7650785
Initial Fix version: TCE 6.3.3 Patch 27

Issue: Scheduled legacy reports are generated from address as user email address instead of Reply-To address.
Tracking Code: SUPPORTPRI-67312
Case number: 2023-0310-7708021
Initial Fix version: TCE 6.3.5 Patch 27

Issue: Blind XSS vulnerability with text type field and GlobalSearch.
Tracking Code: SUPPORTPRI-66934
Case number: 2023-0306-7701009
Initial Fix version: TCE 6.3.3 Patch 27

Issue: User is unable to view admin settings view page.
Tracking Code: SUPPORTPRI-67013
Case number: 2023-0225-7692292
Initial Fix version: TCE 6.3.5 Patch 24

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Issue: System error occurs when performing global search using object Link in Search View.
Tracking Code: SUPPORTPRI-66855
Case number: 2023-0213-7656007
Initial Fix version: TCE 6.3.5 Patch 22

Issue: Invoice total in header level rounded to a penny less.
Tracking Code: SUPPORTPRI-66663
Case number: None
Initial Fix version: TCE 6.2.7 Patch 7

Issue: Getting errors when approving invoices concurrently.
Tracking Code: SUPPORTPRI-67033
Case number: 2023-0208-7651388
Initial Fix version: TCE 6.3.7 PB 3

Issue: Ajax line item Serialization Performance.
Tracking Code: SUPPORTPRI-66583
Case number: None
Initial Fix version: TCE 6.3.7 PB 2

Issue: Legacy performance caching.
Tracking Code: SUPPORTPRI-66450
Case number: None
Initial Fix version: TCE 6.3.6 Patch 8

Issue: When there are large activities being performed on an application, threads get stuck and cause application slowness.
Tracking Code: SUPPORTPRI-66487
Case number: 2022-0930-990576
Initial Fix version: TCE 6.3.6 Patch 8

Issue: Issue with adjusting invoices and reverting adjustments.
Tracking Code: SUPPORTPRI-66766
Case number: 2022-1220-7600237
Initial Fix version: TCE 6.3.5 Patch 22

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Issue: Unable to perform custom search on Child to Child object when trying to retrieve data from Parent to Parent object's field of type Custom Object.
Tracking Code: SUPPORTPRI-66610
Case number: 2022-1216-7551954
Initial Fix version: TCE 6.3.6 Patch 9

Issue: Number type field's data is showing as general data type when custom search results exported to excel sheet and unable to perform calculations.
Tracking Code: SUPPORTPRI-66360
Case number: 2022-1216-7550055
Initial Fix version: None

Issue: Recent History search for matter narratives does not show current day history.
Tracking Code: SUPPORTPRI-66491
Case number: 2022-1209-6705819
Initial Fix version: TCE 6.3.7 PB 2

Issue: Invoices are not getting approved with Middle name having (' or ') as the first letter.
Tracking Code: SUPPORTPRI-66720
Case number: 2022-0627-951778
Initial Fix version: TCE 6.3.3 Patch 27

Issue: TeamConnect vulnerability detected when performing actions using gwt.
Tracking Code: SUPPORTPRI-66990
Case number: 2022-0927-988450
Initial Fix version: TCE 6.2.4 Patch 12

Issue: TeamConnect logs out user when it encounters an error.
Tracking Code: SUPPORTPRI-66239
Case number: 2022-1107-1005545
Initial Fix version: TCE 6.3.7 PB 2

Issue: Legacy Reporting on overlapping fields on combined data series.
Tracking Code: SUPPORTPRI-65986
Case number: 2022-1028-1002104
Initial Fix version: TCE 6.3.6 Patch 8

Issue: Can't use links after clicking the 'Back' button in Safari.

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Tracking Code: SUPPORTPRI-66247
Case number: 2022-1025-1000253
Initial Fix version: TCE 6.3.3 Patch 27

Issue: Sum not working in exported excel sheets for Invoices because the field type is set to general instead of currency.
Tracking Code: SUPPORTPRI-65990
Case number: 2022-0930-990436
Initial Fix version: TCE 6.3.6 Patch 8

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
Initial Fix version: TCE 6.3.5 Patch 22

Issue: 'Imported Change History' status is displayed as 'Running' in user interface but the job status has an end date populated in the database.
Tracking Code: SUPPORTPRI-66581
Case number: 2022-0804-966691
Initial Fix version: TCE 6.3.3 Patch 26

Issue: Encountering system error after using a design export from TeamConnect.
Tracking Code: SUPPORTPRI-67186
Case number: 2022-0523-933210
Initial Fix version: TCE 6.3.5 Patch 27

Issue: Invoice pre-population rule issue when setting warning field as the received date is 150 days greater than invoice starting date.
Tracking Code: SUPPORTPRI-63343
Case number: 2022-0131-885702
Initial Fix version: TCE 6.3.3 Patch 26

Issue: When projects are hidden in Line Items block view, descriptions are also hidden
Tracking Code: SUPPORTPRI-62607
Case number: 2021-1109-855788
Initial Fix version: TCE 6.3.7 PB 3

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Issue: The audit rule is not capturing the assignee email address.
Tracking Code: SUPPORTPRI-63104
Case number: 2021-0916-832002
Initial Fix version: TCE 6.3.5 Patch 22

Issue: Duplicate context root being added to url when a record link is used.
Tracking Code: SUPPORTPRI-67288
Case number: 2022-1004-991519
Initial Fix version: TCE 7.0 PB 2

Issue: Email title changes don't show in TeamConnect.
Tracking Code: SUPPORTPRI-50133
Case number: 2019-0621-535694
Initial Fix version: TCE 6.3.7 PB 2

Issue: The screen looks distorted when adjusting line items in the dialog box.
Tracking Code: SUPPORTPRI-66269
Case number: 2022-1201-4439171
Initial Fix version: TCE 6.3.3 Patch 25

Issue: When viewing 1000 or more line items with 1000 unique timekeepers with rates, the invoice page loads slowly.
Tracking Code: SUPPORTPRI-66285
Case number: 2022-1006-992924
Initial Fix version: TCE 6.3.3 Patch 25

Issue: Appointment Edit Issue with Matter.
Tracking Code: SUPPORTPRI-65549
Case number: 2022-0824-975009
Initial Fix version: TCE 6.3.5 Patch 21

Issue: Adjustments do not save intermittently on interactive Line Items.
Tracking Code: SUPPORTPRI-66199
Case number: 2022-0916-984814
Initial Fix version: TCE 6.3.5 Patch 21

Issue: After uploading a document to a matter "&amp" is added to the file name.
Tracking Code: SUPPORTPRI-64305

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Case number: 2022-0513-929765
Initial Fix version: TCE 6.3.5 Patch 21

Issue: Approvals page loads extremely slowly due to inefficient SQL (that returns only 1 result).
Tracking Code: SUPPORTPRI-64428
Case number: 2022-0207-888875
Initial Fix version: TCE 6.3.5 Patch 20

Issue: Reports pulling 0 as the exchange rate for USD Currency.
Tracking Code: SUPPORTPRI-66210
Case number: 2022-0916-984753
Initial Fix version: TCE 6.3.6 Patch 7

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5   Known Issues

The following items are known issues in the TeamConnect Enterprise® 7.1 release. For more detailed information of the issues documented below, refer to TCE 7.1 Known Issues. Each issue is documented in the following format:

● A description of the issue

● Internal tracking code

Issue: The global search results are not aligning with the maximum search results configured in the admin settings.
Tracking Code: TC-49538

Issue: When the primary address has been deleted from the contact, a duplicate address is getting added.
Tracking Code: TC-48357

Issue: The Total Row footer shows currency symbols for percentage values.
Description: For a number column having a percentage (%) format, the totals row (footer row) shows the total with a currency symbol.
Tracking Code: TC-49692

Issue: Getting gateway timeout error when we are compiling 16 color profile
Tracking Code: TC-49674

Issue: The Right argument value of a rule qualifier is saved as "From Any Value To This Value NO" when the user selects Operator as "Is Changed" and Right Argument as "From Any Value To Any Value" for a Custom Checkbox field.
Tracking Code: TC-45929

Issue: When a user clicks on saved custom searches in the left navigation menu of the manage searches page, they are redirected to the custom searches screen.
Tracking Code: TC-48936

Issue: Issue with Group the Following for Contacts object.
Description: The Group the following option does not show expected results for the filters added in filter criteria for the contact's object.
Tracking Code: TC-48479

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Issue: When "(", ")" is entered in group value fields, error messages are not displayed in the same format.
Tracking Code: TC-48003

Issue: Criteria containing relative fields and related object fields are not displayed when the user interface displays an error message.
Tracking Code: TC-47993

Issue: When the user edits multiple group value fields and attempts to save them for the row in the table, the edited value cannot be saved.
Tracking Code: TC-47992

Issue: If the administrator edits multiple group value fields to any character, an error message displays and the changes cannot be canceled.
Tracking Code: TC-47987

Issue: When a user selects an assigned group (which is YES) and an unassigned group (which is NO), the unassigned group should be assigned and an error message should be displayed on the assigned group.
Tracking Code: TC-47203

Issue: When an administrator exports a design from one instance to another, the description value is not getting exported.
Tracking Code: TC-46413

Issue: In the left navigation panel, the expand/collapse state remains when a user logs in and out.
Tracking Code: TC-46409

Issue: When a user attempts to unsubscribe from a search view (when there is only one search view), a violation error message is displayed.
Tracking Code: TC-45589

Issue: All search views are automatically subscribed to a new user when they are created.
Tracking Code: TC-45490

Issue: While trying to add a Portal window title with Double Quotation(" "), undefined special characters are adding up.
Tracking Code: TC-49421

Issue: The results of a Custom Search with the Date field's operator-value set to the value "Older than 0 days" are not correct.
Tracking Code: TC-49671

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Issue: Even if the order is specified in Setup, the columns added under Result Display of a new Search View (Custom Search type) are displayed alphabetically in the front end.
Tracking Code: TC-49566

Issue: Custom search option in the left navigation turned disabled in some scenarios.
Tracking Code: TC-49690

Issue: Table is getting distorted when performing drag and drop on the table in Interactive Grid.
Tracking Code: TC-49180

Issue: After selecting multiple operators in the filter criteria and selecting a number field multiple times, the login page is displayed to users.
Tracking Code: TC-49970

Issue: Outlook Add-in → If Integration Search View for an Entity is removed after that try to search the Matter name or number in that entity, then an Error message is not displayed in the user interface.
Workaround: If you observe that a search view is still appearing when it has been removed from integration, refresh the Add-in.
Tracking Code: TC-44471

Issue: TeamConnect tag is not visible for non-organizer users.
Description: When the attendee is not the organizer, "TeamConnect" tag is not visible on the appointment.
Tracking Code: TC-46785

Issue: Label only field mandatory icon is not displayed.
Description: While creating a matter, the mandatory or star icon is not displayed for the **Label** field.
Tracking Code: TC-48412

Issue: On the latest version of the document, the created on/old date is getting displayed on the respective document.
Description: Whenever a user views document version history, the current version has the original document's created date in the Add-in but every other version is having their original created date in the plugin.
Tracking Code: TC-47140

Issue: While creating All day Appointment in TeamConnect , the appointment is getting shift one day before in Outlook.

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Description: While creating an all-day appointment in TeamConnect, the appointment will appear one day prior in Outlook. But in TeamConnect the updating date and time updates are accurate.
Tracking Code: TC-47870

Issue: Mismatched Appointment time is getting displayed in TeamConnect.
Description: When an appointment is created in TeamConnect, the time displayed is not matching with the created time.
Tracking Code: TC-47527

Issue: For the "Label Only" field if the user makes it as required in TC then a warning message is getting displayed and the user is not able to create the matter.
Tracking Code: TC-48265

Issue: Tabbing sequence on Firefox, after submit button not working properly.
Description: On Firefox, the task pane flickers after clicking the **Submit** button.
Tracking Code: TC-48267

Issue: (Error Logging) Attaching docs from Add-in to emails
Description: When the mailbox total capacity for attachments exceeds the maximum limit while attaching a document from Add-in to email, there will be an error but the error message will not be displayed in the Add-in.
Workaround: User must request for error logs to know the maximum size limit for the attachments.
Tracking Code: TC-42940

Issue: If the list field is mandatory and the user selects some default value, then it's not getting displayed as prefilled in Outlook.
Tracking Code: TC-48640

Issue: If "View Version" Permission has Denied to User Group, Still User can able to View the Version of the Document on Outlook.
Tracking Code: TC-48932

Issue: When "Create Matter all Categories" Permissions has been denied, Still User can add Categories to the Matter on TeamConnect and Outlook.
Tracking Code: TC-48880

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Issue: When "Create Matter Assignees" Group Permissions has Denied ,Still User can add Assignees to the Matter on Outlook.
Tracking Code: TC-48879

Issue: If "View Matter All Custom Fields" Rights is Disabled for User Group, Still User can view the Matter Custom Objects on TeamConnect and Outlook.
Tracking Code: TC-48876

Issue: If User Denied Create Category rights to Document for User Group, Still User can add Category to the Document on Outlook.
**Description:** Even when the Documents Permission for System rights is set to "Create all Categories" and the Category rights for "Add Category" are denied, users can still add categories in Outlook. While the above statement is true, this feature is working as expected in TeamConnect.
Tracking Code: TC-48938

Issue: If User made "Office Suite Header" and "Office Suite Appointment Category" fields Empty, the Default value is not getting Updated while Saving.
Tracking Code: TC-48891
Description: "Office Suite header cannot be greater than" is getting Displayed on the different Error messages instead of "Office Suite size limit". In case of a validation error on the Office Suite header field, it will display 2 separate error messages.
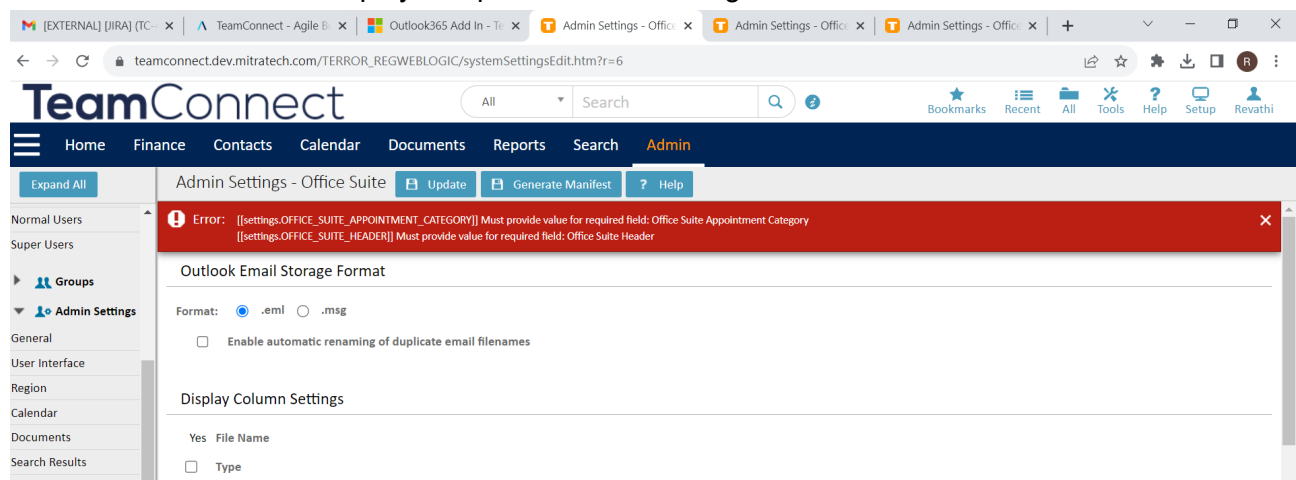
Issue: Unable to Upload a Document on Add-in with Safari Browser and MAC Desktop
Description: On Mac, the permission check for uploads occurs after the system attempts to

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complete the upload, whereas on Windows, permissions are verified before initiating the upload process.
Tracking Code: TC-49212

Issue: Select Category using list
Description: The setting in TeamConnect designed to hide the tree structure for categories on the create matter screen does not function as intended. As a result, the tree structures for categories will always be displayed by default on the new matter creation screen.
Tracking Code: TC-47960

Issue: If a User creates a label and makes it mandatory, the user is not able to create a Matter.
Tracking Code: TC-49426

Issue: On Add-in Logs Settings, Unable to Update values on "Memory Storage Used by Logs" field.
Description: The provided value is not being reflected in the "Memory Storage used by Logs" field.
Tracking Code: TC-49303

Issue: In the Confirmation Pop-Up, the dropdown is not getting closed until the user selects any option.
Tracking Code: TC-49283

Issue: Add-in showing contacts even when a group or contact does not have rights to view.
Tracking Code: TC-49427

Issue: User Interface Issue: When multiple categories are chosen on the appointment page and the page is scrolled, the user interface becomes distorted.
Tracking Code: TC-49365

Issue: If the "Edit and Create Appointment Attendees" Permission is Disabled for the User Group, the User can still be able to edit and create the attendees for the Appointment.
Tracking Code: TC-48647

Issue: After removing Permission for the "Download Document", the user is able to see the download option and also able to download the document.
Tracking Code: TC-49429

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Issue: After removing "Create all Categories" and "Add Category" Permission for User Group and User can still be able to Add Categories to the Documents.
Tracking Code: TC-49431

Issue: If a user does not have rights to view all custom fields from system and Category, the user is still able to view custom fields in Add-in.
Tracking Code: TC-49458

Issue: Certain Fields in Plugin Not Localized.
Description: The following fields in the plugin are not localized:
- None of the fields in the **Logs** are localized.
- Tabs which are used for Navigation are not localized.
- "**All Transactions**" Button is not localized.
- Search button from **Date Filter** is not localized.
- "**All Disputes**" button is not localized.

Tracking Code: TC-49419

Issue: Categories from appointments are not localized.
Tracking Code: TC-49459

Issue: Desktop Add-in → Unwanted document is downloaded in Teamconnect when clicking on "View in TeamConnect" option on the documents in Add-in.
Tracking Code: TC-44265

Issue: On Edit, Removing Additional Category doesn't change the Sync Status in Task pane.
Tracking Code: TC-49540

Issue: After Editing the Appointment & clicking on "save", not able to interact with the Add-in task pane in Appointments.
Tracking Code: TC-49541

Issue: While running the schedule action after updating/deleting the appointment in TeamConnect, the user gets a new appointment in Outlook instead of updated appointment and for deleting the appointment it is not getting removed from Outlook.
Tracking Code: TC-49694

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Issue: Support Text field in Component selection with Create Matter form.

Description: With the Add-in 4.0 release, the "Create Matter" form does not currently offer support for selecting a Text field under the Component selection. The plug-in supports this field.

Tracking Code: TC-49718

Issue: Unable to Upload Multiple Documents from Email.
Tracking Code: TC-49695

Issue: In Setup "Do not Display Category Tree" is Enabled , Invalid Category is getting Displayed on the user interface.
Description: If a user has enabled the "Do not Display Category Tree" checkbox in the Setup, the message "Category Selection Disabled" will be displayed under Categories.
Tracking Code: TC-49907

Issue: While searching matter using hyphen "-", in that case matter result is not getting displayed.
Tracking Code: TC-49927

Issue: Force Sync Feature sends two meeting invites to non Add-in users.
Tracking Code: TC-49536

Issue: Retry queue is generating thousands of retry items.
Tracking Code: TC-49450

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Issue: Alignment of the Searched Results are not proper Under Documents Tab.
Description: The alignment of the result list on the Documents tab is not proper.
Tracking Code: TC-49931

Issue: Date Filter Calendar Not using User Preferences Localization.
Description: The Date Filter calendar in the Office Add-in is utilizing the Admin Preferences Region setting instead of the User Preferences Locale to determine the language for displayed text.
Tracking Code: TC-49933

Issue: Add-in is not Opening on Safari Browser.
Workaround: We suggest you try utilizing an alternative web browser on your Mac.
Tracking Code: TC-49952

Issue: User not able to create a matter if the custom Field is deleted from the Setup menu.
Tracking Code: TC-49430

Issue: For non-indexed objects, performing the Global Search displays an error message.
Tracking Code: TC-49330

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