

This document details the upgrade information, new features, resolved issues, and known issues that are included in Financial Management 6.3.4

## 1 System Requirements

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To install TeamConnect Financial Management 6.3.4, you must be running TeamConnect Enterprise 5.0.5 or later.

TeamConnect Financial Management 6.3.4 is compatible with the following optional TeamConnect products:

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

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

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

## 2 Installation

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You must have admin rights to install this product.

To install TeamConnect Financial Management 6.3.4:

1. In TeamConnect, click the Admin tab, and then click the Admin Settings sub-tab link.
2. In the left pane, click the About link.
3. In the Available Updates section, click Show Updates Available for Installed Products.
4. Locate TeamConnect Financial Management 6.3.4
5. Click Install Now.
6. If the installation is successful, run the below scripts as per TeamConnect database product and restart TeamConnect.

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

a) For Oracle Database:

- i) First, check the number of accounts to be updated, starting on and ending with null:

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

- ii) The Query to update GlobalStartDate and GlobalEndDate:

```
UPDATE E_BSO$  
SET GLOBALENDDATE = '31-DEC-3999', GLOBALSTARTDATE = '01-JAN-05'  
WHERE GLOBALENDDATE is NULL and GLOBALSTARTDATE is NULL;
```

```
commit;
```

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

```
UPDATE T_ACCOUNT  
SET APPL_END_ON = '31-DEC-3999', APPL_START_ON = '01-JAN-05'  
WHERE APPL_END_ON is NULL and APPL_START_ON is NULL;
```

```
commit;
```

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

```
SELECT COUNT(*) from T_ACCOUNT WHERE (APPL_END_ON = '31-DEC-3999' OR  
APPL_END_ON LIKE '%3999-12-31%') and (APPL_START_ON = '01-JAN-2005'  
OR APPL_START_ON LIKE '%2005-01-01%');
```

b) For MSSQL Database:

- i) First, check the number of accounts to be updated, starting on and ending with null:

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

ii) The Query to update GlobalStartDate and GlobalEndDate:

```
begin tran

UPDATE E_BSO$
SET GLOBALENDDATE = '31-DEC-3999' , GLOBALSTARTDATE = '01-JAN-2005'
WHERE GLOBALENDDATE is NULL and GLOBALSTARTDATE is NULL

commit tran;
```

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

```
begin tran

UPDATE T_ACCOUNT
SET APPL_END_ON = '31-DEC-3999', APPL_START_ON = '01-JAN-2005'
WHERE APPL_END_ON is NULL and APPL_START_ON is NULL

commit tran;
```

iv) Query to check number of accounts updated:

```
SELECT COUNT(*) from T_ACCOUNT WHERE (APPL_END_ON = '31-DEC-3999' OR
APPL_END_ON LIKE '%3999-12-31%') and (APPL_START_ON = '01-JAN-2005'
OR APPL_START_ON LIKE '%2005-01-01%');
```

**Note:**

- If the installation is not successful, TeamConnect Financial Management 6.3.4 does not appear as an Installed Product.
- In FMR 6.3.4, the MBI block is added to appeals, but was removed for shadow and accrual invoices.

## 3 Resolved Issues

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This section describes the issues that are resolved in the Financial Management 6.3.4 release. Financial Management 6.3.4 introduces defect resolutions from previous releases as noted below. Each resolved issue is documented in the following format:

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

**Issue:** FMR - Update "goalpost" years value as 3999 instead of null.

**Tracking code:** SUPPORTPRI-69296

**Case number:** None

**Reported Version:** None

**Initial Fix Version:** FMR 6.3.4

**Issue:** Budget Creation Tool adding new fiscal year budgets for involved parties which are not budgeted earlier when there are 2 Involved parties on the matter.

**Tracking code:** SUPPORTPRI-68764

**Case number:** 2023-0828-7964299

**Reported Version:** TCE 6.3.7

**Initial Fix Version:** FMR 6.3.4

**Issue:** Matter Budget Block (MBI) block does not appear for accrual invoices.

**Tracking code:** SUPPORTPRI-68231

**Case number:** None.

**Reported Version:** None.

**Initial Fix Version:** FMR 6.3.3 Patch 1

**Issue:** Vendor Budget screen under Budgets tab of invoice missing annual budget allocated amounts.

**Tracking code:** SUPPORTPRI-68642

**Case number:** 2023-0714-7911055

**Reported Version:** TCE 7.0 PB3

**Initial Fix Version:** FMR 6.3.4

**Issue:** Matter Budgets > The page times out and does not load in a reasonable amount of time due to a large number of accounts.

**Tracking code:** SUPPORTPRI-69582

**Case number:** 2023-0915-7986647

**Reported Version:** FMR 5.0.5

**Initial Fix Version:** FMR 6.3.4

**Description:** Introduced a new block titled "Budgets - Last 5 Years". This block displays budget data over the last five years. The "Model Setup Tool" allows users to add both the "Budgets" block, which displays all years of budgets, and the "Budgets - Last 5 years" block, which displays the last 5 years of budgets, to the dispute object.

**Note:**

- Both the "Budgets" block and "Budgets - Last 5 years" block cannot be added to the same tab, and both blocks should not be selected in the printable view at the same time.
- This FMR ticket includes changes to the present class files. When we update a class file, we must clear the 2x cache in Setup > System settings and then refresh TeamConnect.
- When we install using the module setup tool, it either updates or adds the class files.