MITRATECH

TeamConnect 6.0.2 Release Notes

Summary

This section describes a summary of the changes in TeamConnect Enterprise 6.0.2. For instructions on installing the update, see Upgrade Instructions.

If you are reading the document as a PDF, you can access the most recent version of the Release Notes in our Client Success Center.

Issue Resolutions

This section describes the issues that were resolved in this update.

General

- The Adjustment Source system field for line items is now labeled correctly in TeamConnect Enterprise.
Tracking code: TC-23158, SUPPORTPRI-44340

Reporting

- A number of security enhancements, configuration adjustments, and issue resolutions were implemented to comply with Hosting requirements.

- In high-availability environments, when changing the data set for a report, only the available sets are displayed for selection. Nodes are no longer displayed.
Tracking code: TC-22190, SUPPORTPRI-44342
Note: Secure ElastiCubes by sharing them with the Sisense administrator account provided to you by Mitratech. If an ElastiCube does not have any security, the ElastiCube will display in the list when the dataset for a report is selected or changed.

- To increase performance, the integration now allows for incremental syncs for a table that is 45 MB or larger. With non-incremental syncs, the base table will always be truncated and reloaded; with incremental syncs, only new data is loaded. The 45 MB breakpoint value was specifically chosen after much testing and research to achieve the highest performance levels; while the value can be changed in the autoCube.properties, it is not recommended.

- The version number of the TeamConnect Business Intelligence can now be found in the **version.txt** file in the **TeamConnect_BI** directory where the **autoCube.properties** file is located.
  Tracking code: TC-21350

- Data Security entry for the user did not exist in all query servers.
  Tracking code: TC-22197, SUPPORTPRI-44341

- To enhance performance, certain database tables have been consolidated.
  - The following objects have been removed from reporting. **Tracking code:** TC-21676
    - Task
    - Appointment
    - Document
    - Expense
    - History
  - The following tables that contain "List" values have been removed from the ElastiCube to increase performance. **Tracking code: TC-21496**
    - Category
    - Involved Party
    - Skill
    - Territory
    - Attendee
    - Assignee
    - Resource
    - NonUSTax
    - NonUSTaxCode
    - Matter Cost Center
    - Invoice Cost Center
  - The following Default fields from the tables listed in the previous bullet have been moved into the main object.
    - Default Category (both leaf and full name; see note below)
    - Default Address
    - Default Phone
    - Default Fax
    - Default Inet Address
    - Default Email
    - Main Assignee

    Note: the Default Category fields are divided into **Category** and **Category Full**. For example, if a matter has a bankruptcy, **Category** shows **Bankruptcy** only; **Category Full** displays **Dispute|Bankruptcy**.

The **Categories** field is still available and doesn't change. This field displays each category entry on a separate line. If you have one matter with many categories, you can still see all categories, it's just listed in separate lines. No data is removed.

Known Issues

- When a user is renamed, the user is updated in Sisense but security is not applied. Sync the users and groups to apply the security.
  Tracking code: TC-20189
- If one of the ElastiCubes in an ElastiCube set is showing "Invalid Status" due to a failed schema sync, data will not appear in the reports that involve that ElastiCube set. Check the logs and run a schema sync on the failed ElastiCube.
  Tracking code: TC-24001
- Clicking **Sync users and groups** removes the hosting admin user from the ElastiCube and changes the owner/editor of the Elasticube to the original account that was used to install Sisense. If the owner/editor of the ElastiCube needs to be changed, open the Sisense console and edit the account.
  Tracking code: TC-22297
- Account Spend for invoices with a status other than **Posted** is not displayed accurately.
  Tracking code: TC-23586
- In high availability environments, users are not redirected to the record when they click the link-through value in a report.
  Tracking code: TC-24103
- The field "Invoice Has Non-US Tax Rate" is not a valid field in TeamConnect and displays "No" when there is a Tax Rate. This field is not valid and will be removed in a future release.
- **Tracking code**: TC-23941
- In certain environments, the system will timeout after the user clicks the **Sync Report List** button on Report Integration Tool.
  Tracking code: TC-23929
- Even though the option to grant a view-only reporting group *Can Design* when sharing a dashboard is available, individuals in the group only have view-only rights to the dashboard.
  Tracking code: TC-21748
- The system appends the word "Name" to involved type custom fields. For example, if a field is called **XYZ**, the UI displays **XYZ Name**. If another field already has the name **XYZ Name**, the field is duplicated.
  Tracking code: TC-23990
  Workaround: As a workaround, do one of the following:
  - Make one reportable, and the other not reportable
  - Change one of the names

Upgrade Instructions

You must be using one of the following TeamConnect versions in order to upgrade:

- 3.0 SP1
- 3.0 SP1 Update 1
- 3.1

- 3.1 Update 1
- 3.1 SP1 (including Update 1 and Update 2)
- 3.2 (including Update 1 and Update 2)
- 3.3 (including Update 1 and Update 2)
- 3.3 SP1
- 3.3 SP2
- 3.3 SP3 (including any update from Update 1 through Update 18)
- 3.4 (including any update from Update 1 through Update 8)
- 3.4 SP1 (including any update from Update 1 through Update 20)
- 4.0 (including any update from Update 1 through Update 16)
- 4.1 (including 4.1.1)
- 4.2 (including any update from Update 1 through Update 7)
- 5.0 (including updates 5.0.1 to 5.0.4)
- 5.1 (including 5.1.1)
- 5.2 (including 5.2.3)
- 6.0 (including 6.0.1)

To upgrade to TeamConnect Enterprise 6.0.2:

1. Upgrade TeamConnect.
2. Upgrade TeamConnect Business Intelligence.

Upgrading TeamConnect

To upgrade to TeamConnect 6.0.1, run the TeamConnect Installer as described in the *TeamConnect Enterprise Installation Guide*.

Important: Users upgrading from 5.0 with a SQL Server database should run the upgrade scripts with the database in autocommit mode if their instance contains a large number of line items with adjustment types other than 'NONE'.

Note: These release notes assume that users are upgrading from TeamConnect 5.0 or later. If you are upgrading from a TeamConnect version prior to 5.0, please see the TeamConnect 5.0 Release Notes for information necessary upgrade changes and module dependencies.

Upgrading TeamConnect Business Intelligence

Preparing for Upgrade

Before you begin:

1. Make sure the user has DBA access on the server machine from which they will be running syncs. To check if the user is already a DBA:
    - type **lusrmgr** in the Microsoft Windows search field and open lusrmgr.

    - In the **lusrmgr** window, click **Groups** in the navigation pane and then **ora_dba** to see the list of oracle DBAs on the server.
    - If the user is not in the ora_dba group, click the **Add** button and add the user.
2. Grant the database schema access to create a materialized view by logging into sqlplus as **sysdba** and typing the command:
   ```
   GRANT CREATE MATERIALIZED VIEW TO <DBUsername>;
   ```
   where *<DBUsername>* is the database username for your database. For example:
   ```
   GRANT CREATE MATERIALIZED VIEW TO TCTESTCSM;
   ```

Upgrading .class Files

1. Create a backup of the existing **TeamConnect_BI** directory by moving it to a different location and changing the name. Make a note of the location of the autoCube.proproperties file. You will need the property values in this file
2. Extract the files from the **TCBI_Install_Package.zip** to the same the location of the original **TeamConnect_BI** directory.
3. In TeamConnect, click the **Documents** tab and select **Top Level** from the left pane.
4. Click the **System** folder and then click the **Report Integration** folder.
5. Click the **Sisense** folder.
6. Check out the **SisenseReportAdapter.class** file, then check in the file and select the **SisenseReportAdapter.class** file from the new installation.

Creating a Backup of the Existing ElastiCube

To backup your ElastiCube:

1. In Windows Services, stop **Sisense.ECMS**.
2. Open the PrismServer\ElasticubeData directory, typically located here:
   ```
   %ProgramData%\Sisense\PrismServer\ElastiCubeData
   ```
   Note: If the directory is not in this location, open the Sisense Server Console and click the

   

   Server Preferences icon to verify the correct path.
3. Copy the data to your backup location.

Upgrading the ElastiCube

1. After creating a backup, uninstall the ElastiCube by running the **TCBI_Uninstall.bat** script from the original installation files.
2. Check the log for any errors.
3. If you have not done so already, create a backup of the existing TeamConnect_BI directory by moving it to a different location and changing the name. Make a note of the location of the autoCube.proproperties file. You will need the property values in this file. Extract the files from the **TCBI_Install_Package.zip** to the same the location of the original **TeamConnect_BI** directory.
4. Open the new **autoCube.properties** file with a text editor. Define the property values with the information from the previous installation, being careful not to erase the new property, **sisense.incrementalThreshold**.

5. Run the **TCBI_SchemaSync.bat**.from the upgrade package and check the log for any errors.

Updating Existing Reports

To update your existing reports:

1. The following objects have been removed from reporting, so remove these from any reports:
   Tracking code: TC-21676
   - Task
   - Appointment
   - Document
   - Expense
   - History
2. The following tables that contain "List" values have been removed from the ElastiCube to increase performance. Remove any of these "List" fields in existing reports.
   - Category
   - Involved Party
   - Skill
   - Territory
   - Attendee
   - Assignee
   - Resource
   - NonUSTax
   - NonUSTaxCode
   - Matter Cost Center
   - Invoice Cost Center
3. The following Default fields from the tables listed in the previous step have been moved into the main object. If you used these fields in any of your reports, remap the fields to the new location.
   - Default Category (both leaf and full name; see note below)
   - Default Address
   - Default Phone
   - Default Fax
   - Default Inet Address
   - Default Email
   - Main Assignee

Note: the Default Category fields are divided into **Category** and **Category Full**. For example, if a matter has a bankruptcy, **Category** shows **Bankruptcy** only; **Category Full** displays **Dispute|Bankruptcy**.

The **Categories** field is still available and doesn't change. This field displays each category entry on a separate line. If you have one matter with many categories, you can still see all categories, it's just listed in separate lines. No data is removed.