This document details the upgrade information, new features, resolved issues, and known issues that are included in TeamConnect Enterprise® 6.2.4.

1 System Requirements

Before you begin to install TeamConnect 6.2.4, ensure that your system meets the requirements. For a full list of requirements, refer to the Installation Requirements in the *TeamConnect Enterprise 6.2 Installation Guide*.

The following versions of TeamConnect can be upgraded to TeamConnect 6.2.4:

TeamConnect 5.0 (through 5.0.10)
TeamConnect 5.1 (through 5.1.1)
TeamConnect 5.2 (through 5.2.9)
TeamConnect 6.0 (through 6.0.2)
TeamConnect 6.1 (through 6.1.2)
TeamConnect 6.2 (through 6.2.2)

TeamConnect 6.2.4 is designed to pair with the following versions of modules (notes below reflect the available versions as of the TeamConnect 6.2.4 release date):

AP Link 5.0 Patch 3
CSM 6.2.4
Data Warehouse 6.2
Financial Management 5.0.5
Legal Matter Management 5.0.1 Patches 1-6
Office Suite 3.2.1
Screen Designer 5.2.1
Service of Process (SOP) Manager 5.1.1 Patches 1-3

The following changes to the system requirements should be noted for both new installations and upgraded instances:

1. **Oracle 19c is now supported!**
2. **IE 11 is no longer supported**

To upgrade to TeamConnect Enterprise® 6.2.4, run the TeamConnect Installer as described in the *TeamConnect Enterprise 6.2 Installation Guide*.

2 Upgrade Considerations

This release requires particular steps to be taken for upgrading TeamConnect Business Intelligence.

TeamConnect Enterprise - Potential Breaking Change

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We have upgraded several third party libraries in the TeamConnect platform to resolve security vulnerabilities in the outdated libraries.

CAUTION: If you have Collaborati Spend Management (CSM) integrated with your TeamConnect instance, you MUST upgrade to CSM 6.2.4 after you upgrade to TCE 6.2.4 or the sync will break because of a library change.

Important Note: please be aware that any custom third party integrations a client may have in place could break due to these library updates. Be sure to test any third party integrations in a lower level instance before deploying this upgrade to production.

TeamConnect Business Intelligence

TCBI is now using Sisense 8.2!

If you have a previous installation of TeamConnect Business Intelligence, follow these Upgrade Instructions.

New installation instructions can be found here.

Important Note: Sisense 7.1.1 will be supported for 12 months following this release.

Module and Integration Upgrades

TeamConnect 6.2.4 coincides with the release of the following modules and integrations:

- Office Suite 3.2.1
- Collaborati Spend Management 6.2.4
- TeamConnect Business Intelligence 6.2.4
- Essentials 6.2.4

3 New Features

The following new features have been released in the TeamConnect Enterprise® 6.2.4. Each feature is documented in the following format:

- Feature Name
- Feature Description
- Each enhancement under that feature
- Internal Tracking Codes

New Invoice Line Item Review - Interactive Line items

Provides a new interface for reviewing line item details on complex invoices with the goal of providing

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features that increase the speed, efficiency and accuracy of the invoice review process. Below are some of the new IR High complexity features in New Invoice Line Item are as follows:

- Mark as Reviewed
- Line Item Persistence
- Sort Filter and Clear
- Widgets
- Column Configuration
- Toggle
- Counts and Totals
- Continuous Scroll

Clients can adopt this new feature at their convenience or continue using the existing line item review functionality. The new interactive line items can be “turned on” by the security group using the Setup tool in TeamConnect.

Important Note: The following features can be found in the existing line item review but have not yet been built into the new interactive line items. All of these are prioritized for the phase 2 release of interactive line items. If a workaround is available, it is described below.

1. Inline Adjustment History - the clickable “norgi” arrow that displays a synopsis of all adjustments on the line item made thus far
    - Workaround: Adjustment history is visible inside the adjustment modal on each line item
2. Revert Adjustments inside the Inline Adjustment History - the ability to select a checkbox next to each adjustment history item in order to revert it by the action of the Revert button
    - Workaround: Manually revert past adjustments by negating their value
3. Reject line items - the ability to select 1 or more line items and reject them by action of the Reject button outside the grid
    - Workaround: Adjust each line item to zero by changing the rate or quantity to zero
4. Appealed invoice line item tag - line items appealed by firm billing analysts reappears in the grid with an “Appealed” tag
5. Bulk / Inline adjustment of line items - when enabled, the ability to view the grid of line items in a separate screen where one or more items can be selected in bulk for uniform adjustment; or the ability to tab through quantity, rate and total values to insert new numbers quickly
6. Printable view - the ability to render the grid of line items in a separate view which is specially formatted for printing to paper

Enhancement: Invoice Review - High Complexity - Invoice Timekeeper Filtering

Description: Following changes are implemented to improve Invoice Review:

- Introduced a new row with filter option on each column of the invoice to filter the line items with different values performed by a person to analyze the details of a particular/required line item.

- Smart search functionality is introduced to each of the column filters for quicker search response. On entering the first two characters of a person (string), the matching name of the timekeepers appears on the list. The users have an option to select single or multiple invoices.

Tracking Code: TC-31340

Enhancement: Invoice Review - High Complexity - Column Filtering (Number)

Description: To view the rows with required number/value, introduced operators to the Number filter column. Using operators (<, > and =), the user must filter the required number to/which pulls the exact value. If no operator is selected, then assumed as a direct match. The below are the operators:

- <, >, = exclusively and only one at a time.
- = pulls up the exact value

Tracking Code: TC-31492

Enhancement: Invoice Review - High Complexity - Column Filtering (Date)

Description: Introduced the Date Picker Calendar in the date column to view the invoices that are on the selected date range. When a user clicks on the date column, the system displays a calendar.

- Select the Start Date and End Date in the calendar to view the invoices ranging on the selected date.
- Double click on the same date for Start Date and End Date to view the records of a date.

Tracking Code: TC-31495

Enhancement: Invoice Review - High Complexity - Reset Filters Button

Description: Displays all the column line items of the grid or widgets by enabling the Clear Filter button. The filter option must clear when a column with a filter is removed. The functionality of the Clear Filter button is to clear all the filters that applied to the columns.

Tracking Code: TC-31433

Enhancement: Invoice Review - High Complexity - Column Filtering (String)

Description: Smart search functionality is introduced to filter the columns. On entering the first two characters of the string data type, the match criteria of the search results appear in the list. The users can select single or multiple invoices from the search result.

Tracking Code: TC-31491

Enhancement: Invoice Category Filtering

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Description: Introduced a new column Category to display the list of Invoice line items with Fee or Expenses. The characters entered to filter the column are strings that match the code used for line items on the specific invoice.

Tracking Code: TC-31341

Enhancement: Invoice Review - High Complexity - Activity Column Filtering (String)

Description: Provided ability for the Users to view the large invoices by filtering the columns with different activities. For example, a User might filter by the activity "Billable Travel Time" to analyze those charges.

Tracking Code: TC-32188

Enhancement: Invoice Review - High Complexity - Original Columns Filtering (Number)

Description: For number filtering, the following new columns are added for both quantity and currency:

- Original Quantity
- Original Rate
- Original discount
- Original Total

Tracking Code: TC-32187

Enhancement: Invoice Review - High Complexity - Adjusted Columns Filtering (Number)

Description: For number filtering, the following new columns are added:

- Adjusted Quantity
- Adjusted Rate
- Adjusted discount
- Adjusted Total
- Adjustment total

Tracking Code: TC-32186

Enhancement: Invoice Review - High Complexity - Project Column Filtering

Description: Introduced the filter option on the Project column to view the projects billed against on the invoice.

Tracking Code: TC-32082

Enhancement: Invoice Review - High Complexity - Search Views

Description: Introduced search views option to select and display the selected rows on the grid from the search results.

Tracking Code: TC-32762

Enhancement: Invoice Review - High Complexity - Redo Grid for Description and Warning

Description: To improve the Redo Grid for the line item "Description and Warning", the following changes are implemented:

- A subline is added beneath each row of the line item of the grid.
- The line items are removed as columns on each row of the grid.
- Do not display the warning message if there are no warning alerts.
- Display the description as N/A if there is no description text.
- Provided the "Show more" link, which expands the row to display the full description of clicking.
- Provided the "Show less" link, which collapses the expanded description and resizes the grid row to the original format.

Tracking Code: TC-32635

Enhancement: Invoice Review - High Complexity - Add Description & Warning

Description: To improve the line item "Description and Warning", the following changes are implemented:

- A subline is added beneath each row of the line item of the grid.
- The line items are removed as columns on each row of the grid.
- Do not display the warning message if there are no warning alerts.
- Display the description as N/A if there is no description text.
- Provided the "Show more" link, which expands the row to display the full description of clicking.
- Provided the "Show less" link, which collapses the expanded description and resizes the grid row to the original format.

Tracking Code: TC-32636

Enhancement: Adding Column "Type" & Filter to the column

Description: Introduced a new column ‘Type’ with filters as All, Fee, and Expense drop-down list. This column is configurable and a default column.

Tracking Code: TC-32776

Enhancement: Invoice Review - High Complexity - Display Default and Alternate Currency Symbols in the Grid

Description: Introduced the currency symbols to display for the selected Country on Submitted Total number field on Invoice. Users can configure this field to display currency corresponding to the selected country in the grid.

Tracking Code: TC-32021

Enhancement: Add adjust modal hyperlink to original rate, quantity and total cell values

Description: Introduced hyperlink option to number values to the following columns that navigates to the Adjusting Modal:

- Original rate to rate modal
- Original quantity to quantity modal
- Original total to total modal

Tracking Code: TC-33028

Enhancement: Specify Default Columns and their Order

Description: By default, the following columns are displayed in the UI:

- Checkbox
- Item (fka Item Number)
- Reviewed eyeball
- Date
- Type
- Category
- Activity
- Timekeeper
- Original Rate
- Original Units
- Original Discount
- Original Total
- Adjusted Total

Checkbox and Item columns are fixed, and the other columns are configurable.

Checkboxes are added to the list of the columns to configure.

Tracking Code: TC-32771

Enhancement: Column Configuration Panel Design Update

Description: The following changes have been implemented in Column Configuration panel:

- Added a horizontal line as separator after default columns to identify the columns as default and optional columns.
- Displays column names with checkboxes in alphabetical order.
- For more visibility, X button at the top right corner is made darker in the column configuration panel.

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Tracking Code: TC-32772

Enhancement: Column Widths and Horizontal Scroll

Description: The following are the new updates provided to the user:

- ability to add the selected columns from column configuration to the grid.
- the optional columns can be resized and reorder.
- the columns are automatically adjusted with the text entered.
- the horizontal scroll bar has been extended to move to the left of the grid.

Tracking Code: TC-32773

Enhancement: Invoice Review - High Complexity - Persistence - Grid Updates in Real Time

Description: The line items are adjusted automatically when the changes are applied in the grid without reloading the page.

Tracking Code: TC-32754

Enhancement: Invoice Review - High Complexity - Description & Warning Filter

Description: The following changes are implemented in the line item "Description and Warning":

- Added filter option to the text field.
- Smart search functionality is added to the text field filter option. On entering the first two characters, the match criteria of the search results appear in the list as highlighted and Description and Warning text boxes are highlighted as grayed out.
- No line items are displayed when search results do not match.

Tracking Code: TC-32637

Enhancement: Invoice Review - High Complexity - Category/Task Code Widget Interaction

Description: Introduced the graphical representation “Total Spend by Task Code” widget in the Work Status in the form of pie chart. The Available Fields list shows the Category fields available from the search report. The Category field in a pie chart shows the top 5 values as slices. Clicking on a slice will filter the table as follows:

- Left Click on pie slice – Displays the filtered line items that match the value/option. Top 5-line items are displayed in the slice "Other" when selected, if necessary.
- Left Click on whitespace - Resets to no filter on the widget if there are any.

Filtering option affects the widgets as well as the ‘Clear all filters’ button in the grid.

Tracking Code: TC-31557

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Enhancement: Invoice Review - High Complexity - Fee/Expense Ratio Widget Interaction

Description: Introduced Fee/Expense ratio in the form of graphical representation as “Total Spend by Type” widget in the Work Status which directly interacts with the line items widget in two ways:

- Left Click on pie slice – Displays the line items that match the filter value/option. TTop 5-line items are displayed in the slice "Other" when selected, if necessary.
- Left Click on whitespace - Resets to no filter on the widget if there are any.

Filtering option affects the widgets as well as the ‘Clear all filters’ button in the grid.

Tracking Code: TC-32099

Enhancement: Invoice Review - High Complexity - Timekeeper Widget Interaction

Description: Introduced Timekeeper widget interaction in the form of graphical representation as “Total Spend by Timekeeper” widget in the work Status which directly interacts with the line items widget in two ways:

- Left Click on pie slice – Displays the line items that match the filter value/option. Top 5-line items are displayed in the slice "Other" when selected, if necessary.
- Left Click on whitespace - Resets to no filter on the widget if there are any.

Filtering option affects the widgets as well as the ‘Clear all filters’ button in the grid.

Tracking Code: TC-31436

Enhancement: Invoice Review - High Complexity - Fee/Expense Ratio Widget Display

Description: Introduced a pie chart widget, “Total Spend by Type”, that displays the breakdown of spend between Fee and Expense for the current invoice.

The pie chart consists of two separate pie slices “Fee and Expense” of the timekeepers. Hovering on the Fee or Expense slice, shows the total spend and the percentage of the total spend by that type. Clicking on a pie slice will filter the invoice line items by that type.

Tracking Code: TC-32083

Enhancement: Invoice Review - High Complexity - Timekeeper Widget Display

Description: Introduced a pie chart widget, “Total Spend by Timekeeper”, which displays the total spend and percentage of spend for the top 5 highest spend timekeepers on the invoice. All of the remaining timekeeper spend is captured under “Other”. Hovering on the slice, displays the Timekeeper Name, Percentage of amount spent and the total sum spent (Rate x Quantity) by the timekeeper. The invoice line items can be filtered by each timekeeper by clicking on a pie slice.

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Tracking Code: TC-31430

Enhancement: Invoice Review - High Complexity - Category/Task Code Widget Display

Description: Introduced a pie chart widget, “Total Spend by Task Code” which displays the total spend and percentage of spend for the top 5 highest spend task categories on the invoice. All of the remaining task category spend is captured under “Other”. The Task Code widget corresponds to the Category column in the line item table. The invoice line items can be filtered by each task code category by clicking on a pie slice.

Tracking Code: TC-31556

Enhancement: Invoice Review - High Complexity - Mark as Reviewed

Description: Provided clickable eyeball icon in the slickgrid to mark the status of the invoice as Marked or Unmarked. If the invoice is read, click on the closed eyeball which changes the status to open eyeball indicates that the record is “Read”, and a closed eyeball indicates “Unread” state. Clicking on the ‘Only Reviewed’ tab, pie chart displays all the reviewed invoices in Line Items widget. Only the ‘Unreviewed’ tab displays all the unreviewed invoices in the pie chart and in Line Items widget.

Tracking Code: TC-32634

Enhancement: Invoice Review - High Complexity - Hyperlink for Adjustment History

Description: Displays only the Adjustment History values in the pop-up window when a Non-assigned user or reviewer clicks on the value hyperlink and this user is restricted to edit the original value.

Tracking Code: TC-33123

Enhancement: Invoice Review - High Complexity - Removing Column From Configuration also clears its filter if there is one

Description: The column filter has to be cleared before removing the column from column configuration.

Tracking Code: TC-32640

Enhancement: Column sorting should be high value and Boolean true values first

Description: Updated the column headers in the grid. When the user clicks on the column header, sorting should be in ascending order with true Boolean values first.

Tracking Code: TC-32193

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Enhancement: hasAdjustments column to have values to display adjustment type

Description: Introduced new default column **hasAdjustments** to be displayed in the Line Items grid with "Any", "Auto", "Manual" or "Both" as drop-down list. This column displays which line item is adjusted with the selected values "Any", "Auto", "Manual" or "Both" with a hyperlink. When the user clicks on hyperlink, Adjustment History Modal pop-up with the Adjusted history details.

Tracking Code: TC-33143

Enhancement: Hide interactive line items from Printable view panel

Description: Interactive line items will not be available for printable view for this release.

Tracking Code: TC-33596 (TC-33579)

Enhancement: Timekeeper and Category Widget Display

Description: Provided the ability to display the top 5 values/invoices as pie slices in the following widgets:

- Display two slices in the Type widget.
- Displays only 6 slices in The Timekeeper and Task Code widgets.
- Display the remaining invoices grouped together as “Others” as a single pie slice.

Tracking Code: TC-33552

Enhancement: Invoice Review - High Complexity - Remove Button

Description: Provided the ability for the user with permissions to remove the selected line items from the invoice by clicking on the “Remove” button. System updates Line items when the user saves the invoice. Cancel will revert the line items to their original state.

Tracking Code: TC-32036

Enhancement: Invoice Review - High Complexity - Line Item Project Column

Description: Introduced a new column **Project in invoice** details grid which displays the line items with Matter name that are billed/linked against the Matter in the grid of the Invoice. The column is provided with ascending and descending options with display name.

Tracking Code: TC-31799

Enhancement: Invoice Review - High Complexity - **Description:** and Warnings Columns

Description: The following changes are implemented to improve the Description column:

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- Added Description column to each line item in the grid.
- Displays the line item description data with limited data.
- If description is longer than the column width, an ellipsis is provided at the end of the short description to indicate more text is available.
- Hover on the description system displays the entire description text upto 2000 characters.

Tracking Code: TC-31678

Enhancement: Enable Client to Choose New High Complexity Invoice Review Feature (IT 4.3)
Description: Users are provided with an option to select the New Invoice details setup or continue with the older version.
Tracking Code: TC-31627

Enhancement: Invoice Review - High Complexity - Adding line item to invoice with no line items display
Description: Displays a newly added line item when added to an invoice.
Tracking Code: TC-31626

Enhancement: Invoice Review - High Complexity - User can restore default column configuration
Description: To restore the layout to default columns from left to right, users are provided to select "Restore default column configuration" option by right clicking the header of the column. The default columns are displayed when the local browser cache is cleared as below:

1. Checkbox
2. Item Number
3. Date
4. Timekeeper
5. Category
6. Adjusted Quantity
7. Adjusted Rate
8. Adjusted Discount
9. Adjusted Total

This will also:

- Hide non-default columns
- Restore hidden default columns
- Restore order of default columns
- Restore column widths to standard values

Tracking Code: TC-31621

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Enhancement: Invoice Review - High Complexity - Totals Row (IT 4.4)

Description: Users are provided by displaying the total value of dollar amounts and quantities at the bottom of the grid for the columns Quantity, Discount, Adjustments and Total. When the filter is applied to the columns, the total value of the filtered rows displayed at the bottom of the grid.

Tracking Code: TC-31555

Enhancement: Invoice Review - High Complexity - View Reviewed Only Button (IT 4.2)

Description:

The following changes are implemented to improve Invoice Review:

- Renamed the “Reviewed” button to “Only Reviewed”.
- When a user clicks on “Only Reviewed” button, displays the line items that are marked as reviewed in the checkbox.
- Non-reviewed line items display empty grid.

Tracking Code: TC-31440

Enhancement: Invoice Review - High Complexity - View Remaining Only Button (IT 4.2)

Description: The Following changes are implemented to improve Invoice Review:

- Renamed the “Reviewed” button to “Only unreviewed”.
- When the user clicks on the “Only Unreviewed” button, it displays the line items that are marked as unreviewed in the checkbox.
- Non-reviewed line items display empty grid.
- Displays both Reviewed and Unreviewed rows when clicks on the “ALL” button.

Tracking Code: TC-31439

Enhancement: Invoice Review - High Complexity - Mark Unreviewed Button (IT 4.2)

Description: Provided ability for the user to select one or more or all line items and mark as “Unreviewed”. The empty checkboxes indicate “Reviewed”.

Tracking Code: TC-31438

Enhancement: Invoice Review - High Complexity - Mark Reviewed Button

Description: The following changes have been implemented to improve the Mark Review button:

- Line items are marked Reviewed as once reviewed.
- Reviewed is indicated in the Reviewed column with an icon.
- Reviewed status persists between different sessions in the same local browser.
- Reviewed status will revert to empty if the local browser cache is cleared.
- Reviewed status reverts to empty for each new reviewer in the workflow.
- Users are provided with multi selection to mark the line items as reviewed at once.

Tracking Code: TC-31437

Enhancement: Invoice Review - High Complexity - Column Configuration Persistence (IT 4.2)

Description: Updated the changes and made column configuration persistent between the sessions for each user on the same browser or in different browsers of the same local machine. Persistence is defined as remembering the following attributes:

- Remembering the optional inclusion of non-default columns
- Remembering the actions to hide default columns
- Remembering the order of columns from left to right
- Remembering the column widths set for each distinct column

Tracking Code: TC-31431

Enhancement: Invoice Review - High Complexity - Column Configuration (IT 4.1)

Description:

The below changes have Provided ability for the User to reorder the default columns in order:

- User is provided to reorder the default columns in order
- User can hide one or more individual columns. Once hidden, user can right click on other column headers and select "show hidden columns" which restores the hidden columns to their default positions according to the order below:
  - Original Units
  - Original Rate
  - Original Discount
  - Original Total
  - Has Comments
  - Has Warnings
  - Has Adjustments
  - Reviewed

Tracking Code: TC-31414

Enhancement: Invoice Review - High Complexity - Widgets (Pie Chart)

Description: Introduced a pie chart widget to the Invoice. The functionality of the pie chart widget is to display the accurate types of data values that add the visual context to the Invoice data.

- **Spend by Timekeeper (pie chart)** – Displays the list of top 5 timekeepers based on their original spend with an aggregate pie slice labeled "others" which contains all the spend for timekeepers.
- **Spend by line item type ratio**: Displays the Fees vs Expenses (pie chart) data values.
- **Timekeeper classification ratio**: Displays the [Partner vs Associate vs Of Counsel vs Others (Pie chart)] – the list of top 3 timekeeper classifications based on their original spend with an aggregate pie slice labeled "others" which contains all the spend.

Tracking Code: TC-31392

Enhancement: Invoice Review - High Complexity - Widget Interactivity

Description: The following changes have been implemented to improve widget interactivity:

- When a data value is clicked inside a widget, displays the Interactive widgets that filter invoice line items in the grid.
- When a user clicks on any individual pie slice, the grid filters out the rows that do not match the criteria described by that slice.
- Currently selected is displayed when the pie slice is selected by changing the border of that slice.
- The selected pie slice will move outward 10 pixels to indicate that it is currently selected, leaving the remaining pie slices visible so that users can see what the other pie slices contain.

Tracking Code: TC-31391

Enhancement: Invoice Review - High Complexity - Counts (IT 4.3)

Description: Displays the total number of selected line items count of the total number of invoice line items at the bottom of the grid.

Tracking Code: TC-31359

Enhancement: Invoice Review - High Complexity - Invoice Sorting (IT 4.2)

Description: When an invoice has many items to review, user is provided with an option to sort the line items to display in ascending order i.e., highest dollar amount at the top of the list in the grid.

Tracking Code: TC-31338

Enterprise Changes to Support TeamConnect Business Intelligence Improvements

Enhancement: Expose security toggle to front end for Support.
Tracking Code: TC-32658

4 Resolved Issues

The following items have been resolved in the TeamConnect Enterprise® 6.2.4 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: Rules on trigger "Delete" are executed even when rule execution is disabled

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Tracking Code:SUPPORTPRI-28286
Case Number: 2017-0125-340277
Initial Fix Version: TCE 6.2.4

Issue: Unable to set Focus on field using invokeBlockAction
Tracking Code: SUPPORTPRI-50384
Case Number: 2019-0625-536088
Initial Fix Version: TCE 6.2.4

Issue: Date Fields > If a date value is entered in yyyy-mm-dd format, the date displays a day off
Tracking Code: SUPPORTPRI-53219
Case Number: 2020-0107-576248
Initial Fix Version: TCE 6.2.4

Issue: Value cannot be null error is thrown in outlook while updating the appointment
Tracking Code: SUPPORTPRI-54433
Case Number: n/a
Initial Fix Version: TCE 6.2.4

Issue: Add a matter flag to specify that a matter was created using Outlook matter creation
Tracking Code: SUPPORTPRI-54462
Case Number: n/a
Initial Fix Version: TCE 6.2.4

Issue: The name of *.eml documents cannot be edited within TeamConnect but they can edited via the Outlook Plugin
Tracking Code: SUPPORTPRI-35058
Case Number: 2017-1218-421377
Initial Fix Version: TCE 6.2.4

Issue: Error with 'File type' field in filter criteria
Tracking Code: SUPPORTPRI-53044
Case Number: 2019-1208-571549
Initial Fix Version: TCE 6.2.4

Issue: Global Search indexing will stop without error if garbage collection is running for too long
Tracking Code: SUPPORTPRI-53065
Case Number: 2019-0515-527384
Initial Fix Version: TCE 6.2.4

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

Issue: Filters are not working if applied on table in right side when using left outer join
Tracking Code: SUPPORTPRI-49999
Case Number: 2019-0603-531109
Initial Fix Version: TCE 6.1.2 Patch 7

Issue: Audit rule capturing incorrect values in the History record
Tracking Code: SUPPORTPRI-51456
Case Number: 2019-0725-542446
Initial Fix Version: TCE 6.1.2 Patch 9

Issue: Cannot save contact cards with Information when Duplicate Contact Manager is Active
Tracking Code: SUPPORTPRI-54667
Case Number: 2020-0422-600274
Initial Fix Version: TCE 6.2.2 Patch 1

Issue: Special Characters not displayed correctly in the Exported PDF version of Reports
Tracking Code: SUPPORTPRI-54612
Case Number: 2020-0414-598632
Initial Fix Version: TCE 6.2.1 Patch 11

Issue: Add New Outside Counsel Wizard Hangs if there are too many results
Tracking Code: SUPPORTPRI-54696
Case Number: 2020-0428-601488
Initial Fix Version: TCE 6.2.1 patch 13

Issue: Using multiselect option on Filter tags can cause errors in document generation
Tracking Code: SUPPORTPRI-55097
Case Number: 2020-0317-593526
Initial Fix Version: TCE 6.2.2 Patch 2

Issue: "Send for Review" and other similar buttons are experiencing slow performance
Tracking Code: SUPPORTPRI-54774
Case Number: 2020-0508-612008
Initial Fix Version: TCE 6.2.1 Patch 14

Issue: Formula Field not working for Combine Data Series
Tracking Code: SUPPORTPRI-54806
Case Number: 2020-0420-599617
Initial Fix Version: TCE 6.2.1 Patch 15

Issue: Double click issue with Safari browser
Tracking Code: SUPPORTPRI-54846
Case Number: 2020-0417-599460
Initial Fix Version: TCE 6.1.1 Patch 7

Issue: AP Output > Is not able to return the correct search results if the search qualifier contains a list field with a 'Not Equal' condition
Tracking Code: SUPPORTPRI-54588
Case Number: 2020-0422-600242
Initial Fix Version: TCE 6.2.1 Patch 10

Issue: System object links - Double click issue with Safari browser
Tracking Code: SUPPORTPRI-55206

Case Number: 2020-0417-599460
Initial Fix Version: TCE 6.1.1 Patch 8

Issue: The option “Display next approval after my response” is not available when approving invoices
Tracking Code: SUPPORTPRI-55213
Case Number: 2020-0603-616752
Initial Fix Version: TCE 6.2.1 Patch 16

Issue: Data mapping tool does not generate xml correctly for merge fields on contact-centric lists
Tracking Code: SUPPORTPRI-55242
Case Number: 2020-0602-616387
Initial Fix Version: TCE 6.2.1 Patch 17

Issue: Assignee for appointment is deleted in Teamconnect calendar while a user is declining/deleting an appointment from mail calendar
Tracking Code: SUPPORTPRI-54282
Case Number: 2020-0214-585245
Initial Fix Version: TCE 6.1.2 Patch 10

Issue: Custom Search Error- with date syntax 6/3/2019 in 'Matter Description' memo type field
Tracking Code: SUPPORTPRI-52616
Case Number: 2019-1107-565590
Initial Fix Version: TCE 5.2.9

Issue: Displaying the same child object multiple times in 'All' link dropdown
Tracking Code: SUPPORTPRI- 35242
Case Number: 2018-0119-426605
Initial Fix Version: TCE 5.2.9

Issue: Error while logging into TeamConnect - cache issue [Tomcat]
Tracking Code: SUPPORTPRI-42595
Case Number: 2018-0726-466842
Initial Fix Version: TCE 5.2.9

Issue: Scheduled Actions tool creating schedule off by 1 day
Tracking Code: SUPPORTPRI-46742
Case Number: 2019-0216-508064
Initial Fix Version: TCE 5.2.9

Issue: Search module with just 1 filter criteria requiring a literal value causes system error when pressing 'Enter'
Tracking Code: SUPPORTPRI-51308
Case Number: 2019-0711-539272
Initial Fix Version: TCE 5.2.9

Issue: Audit rule on User object is causing the OptimisticLockException when portal panes are minimized and maximized continuously
Tracking Code: SUPPORTPRI-51328
Case Number: 2019-0809-546112

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Initial Fix Version: TCE 5.2.9

Issue: Memo text field displays with wrong Alignment
Tracking Code: SUPPORTPRI-53035
Case Number: 2019-1024-562675
Initial Fix Version: TCE 5.2.9

Issue: Mass Edit functionality to update Assignee for Task object is not working
Tracking Code: SUPPORTPRI-52680
Case Number: 2019-1122-569078
Initial Fix Version: TCE 5.2.9

Issue: Fields are in random order on category rights page
Tracking Code: SUPPORTPRI-52764
Case Number: 2019-1108-565720
Initial Fix Version: TCE 5.2.9

Issue: Using setMultivalueFieldValue() to copy MVL items from one MVL to another does not clear target list before adding values
Tracking Code: SUPPORTPRI-52556
Case Number: 2019-0814-547062
Initial Fix Version: TCE 5.2.9

Issue: Task and Appointment Reminders sent a day early
Tracking Code: SUPPORTPRI-53031
Case Number: 2019-0815-547462
Initial Fix Version: TCE 5.2.9

Issue: Reminders not sent for updated or copied Tasks/Appointments
Tracking Code: SUPPORTPRI-54131
Case Number: 2019-0916-554051
Initial Fix Version: TCE 5.2.9

Issue: Invoice Approval workflow is forwarded to second stop even if the Stop 2 approver does not existed
Tracking Code: SUPPORTPRI-53398
Case Number: 2020-0103-575779
Initial Fix Version: TCE 5.2.9

Issue: Clustering performance changes
Tracking Code: SUPPORTPRI-54340
Case Number: N/A
Initial Fix Version: TCE 5.2.9

Issue: Saving custom searches throws the error
Tracking Code: SUPPORTPRI-55064
Case Number: 2020-0518-613658

Initial Fix Version: TCE 5.2.9

Issue: [Native Reporting] Remove and replace flash from TeamConnect for native reporting with ipad fallback
Tracking Code: SUPPORTPRI-52598
Case Number: N/A
Initial Fix Version: TCE 5.2.9

Issue: [Native Reporting] Include filter options
Tracking Code: SUPPORTPRI-52599
Case Number: N/A
Initial Fix Version: TCE 5.2.9

Issue: [Native Reporting] Include drill down options
Tracking Code: SUPPORTPRI-52600
Case Number: N/A
Initial Fix Version: TCE 5.2.9

Issue: While getting wizard parameter value, we are only getting start of day for the selected date irrespective of time value selected in Date & Time parameter.
Tracking Code: SUPPORTPRI-51889
Case Number: 2019-0917-554165
Initial Fix Version: TCE 6.2.2

Issue: Long record names cause screen to 'jump'
Tracking Code: SUPPORTPRI-52182
Case Number: 2019-0906-552204
Initial Fix Version: TCE 6.2.2

Issue: 'Back to Previous' button Styling Issue on Generate Document screen
Tracking Code: SUPPORTPRI-52186
Case Number: 2019-1028-563265
Initial Fix Version: TCE 6.2.2

Issue: Project name generation not correctly implemented for MVList fields
Tracking Code: SUPPORTPRI-52229
Case Number: N/A
Initial Fix Version: TCE 6.2.2

Issue: Error when updating search qualifiers
Tracking Code: SUPPORTPRI-18238
Case Number: 2016-0517-250320
Initial Fix Version: TCE 6.2.2

Issue: Mass edit drop down not showing all child values of a drop down table
Tracking Code: SUPPORTPRI-32819
Case Number: 2017-1005-403260
Initial Fix Version: TCE 6.2.2

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Issue: Getting error "The page isn’t redirecting properly" while accessing workflow process manager
Tracking Code: SUPPORTPRI-35041
Case Number: 2018-0103-423223
Initial Fix Version: TCE 6.2.2

Issue: Invoice print view issue
Tracking Code: SUPPORTPRI-50636
Case Number: 2019-0618-534768
Initial Fix Version: TCE 6.2.2

Issue: Client is not able to save the record if one of the selected multi-list value gets deactivated
Tracking Code: SUPPORTPRI-52578
Case Number: 2019-1010-559579
Initial Fix Version: TCE 6.2.2

Issue: [Native Reporting] Remove and replace flash from TeamConnect for native reporting with ipad fallback
Tracking Code: SUPPORTPRI-52598
Case Number: N/A
Initial Fix Version: TCE 6.2.2

Issue: [Native Reporting] Include filter options
Tracking Code: SUPPORTPRI-52599
Case Number: N/A
Initial Fix Version: TCE 6.2.2

Issue: Matters in outlook do not follow any order
Tracking Code: SUPPORTPRI-52539
Case Number: 2019-1118-567790
Initial Fix Version: TCE 6.2.2

Issue: [Native Reporting] Include drill down options
Tracking Code: SUPPORTPRI-52600
Case Number: N/A
Initial Fix Version: TCE 6.2.2

Issue: Error on Invoice Search View using a custom List field
Tracking Code: SUPPORTPRI-52620
Case Number: 2019-1105-564839
Initial Fix Version: TCE 6.2.2

Issue: A malicious individual with valid credentials and access to the “Contacts” menu, can access the “New Person” function in order to store arbitrary JavaScript code in the database
Tracking Code: SUPPORTPRI-52688
Case Number: 2019-1210-572018
Initial Fix Version: TCE 6.2.2

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Issue: Task and Appointment Reminders sent a day early
Tracking Code: SUPPORTPRI-53031
Case Number: 2019-0815-547462
Initial Fix Version: TCE 6.2.2

Issue: Memo text field displays with wrong Alignment
Tracking Code: SUPPORTPRI-53035
Case Number: 2019-1024-562675
Initial Fix Version: TCE 6.2.2

Issue: Edit icon it is displaying text instead of the normal pencil icon
Tracking Code: SUPPORTPRI-52882
Case Number: 2019-1011-559791
Initial Fix Version: TCE 6.2.2

5 Known Issues

The following items are known issues in the TeamConnect Enterprise® 6.2.4 release. Each issue is documented in the following format:

- A description of the issue
- Internal tracking code

Issue: If you resize a column in the line item grid and then drag and that column to a new position, the "Reset Column" option is getting disabled.

Description: This issue has been fixed by enabling the "Reset Column" when this operation is performed.

Tracking Code: TC-33850

Issue: In Firefox, if a user selects a pie chart widget and filters by "Only Reviewed", the user may see positive dollar amounts with a negative percentage.

Description: In the Firefox browser, when a user applies multiple filter and check the widgets (Pie Chart) Value in "Only Reviewed" section, displays positive dollar amounts with a negative percentage but the widget has to display the positive value or rate with positive percentage.

Tracking Code: TC-33820

Issue: 'Nothing Found to display' for Non-US Tax Code in New Invoice Wizard.

Description: In New Invoice wizard, 'Nothing found to display' for Non-Us Tax Code is appearing instead of a drop-down block under Non-US Tax Code table where a user enters the tax value selecting option as Non-US.

Tracking Code: TC-33810

Issue: Information that is revealed by hovering over it with a mouse cannot be revealed using only the keyboard.

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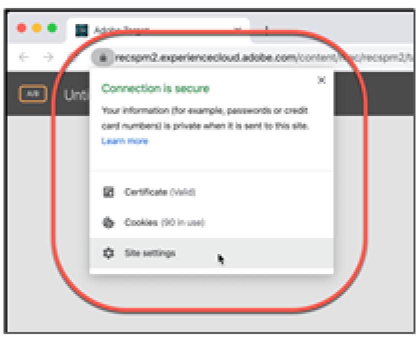
Description: This issue has been fixed to display the text when hovered over the hyperlink with a mouse or using a keyboard.
Tracking Code: TC-33803

Issue: When a user try to make a manual Adjustment pop-up not getting closed and in console it's throwing an error
Description: Displaying an error, when a user tries to adjust the values by clicking on any value in the line item and inserting the new value and clicking on save, the save button is not getting. To fix the error, the user has to modify manually in the browser settings. Follow the below steps to different browsers:

1. **Enabling mixed content in Google Chrome**
   When visiting a site via a secure connection, Google Chrome will verify that the content on the web page has been transmitted safely.

   Update the Chrome site settings, with the latest version of Chrome (version 79.0.3945.117 or later). Visitors are not required to complete the below steps.

   The required steps:
   1. Click the lock or caution icon on the address bar >> Site settings.



   2. Scroll to Insecure content, then use the drop-down list to change Block (default) to Allow.
   3. Reload the VEC page.

2. **Enabling mixed content in Mozilla Firefox**
   By default, Firebox blocks pages that mix secure and insecure content. It is recommended to change the settings permanently to use Target.
   1. In Firefox, enter about:config in the address bar.
   2. Acknowledge the warning message displayed by Firefox.
   3. In the search bar, type block_active.
   4. Double-click **[security.mixed_content.block_active_content]**.
   5. The value changes from "True" to "False." When the value shows "False," it is completed.

   It is recommended to restart your computer after changing this setting.

3. **Enabling mixed content in Microsoft Internet Explorer**

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By default, Internet Explorer blocks pages that mix secure and insecure content. It is recommended to change permanently the settings to use Target.

1. In Internet Explorer, click the settings icon > Internet Options.
2. Open the Security tab.
3. Select Internet, then click Custom Level.
4. Select Miscellaneous.
5. Enable Display Mixed Content under Miscellaneous.
6. Click OK > Yes > Apply.

Tracking Code: TC-33808

Issue: Log is not showing up after the upload is failed in DMS

Description: This issue has been fixed to display the error messages “Error Upload File: File size cannot exceed 210MB” in the logs.

Tracking Code: TC-33906

Issue: TC won't autocomplete search for a name with accents

Description: This issue has been fixed by looking for the name in the contacts using autocomplete in TeamConnect.

Tracking Code: TC-33931

Issue: Grid activity not recognized - causing timeouts

Description: Issue is fixed in TeamConnect by recognizing the "activity", when a user makes adjustments, sorts, filters and interacts in the grid.

Tracking Code: TC-33930

Issue: "New Session" button is not working while logging using IE or .NET Browser from outlook - Backlog

Description: Issue is fixed and the "New Session" button is working while logging using IE or .NET Browser from outlook as expected.

Tracking Code: TC-33818

Issue: [TC6] 'install now' links do not show up for instance on weblogic

Description: Renamed 'Available upon request' links as 'Install Now' for the modules that are configured in Maestro to display in TC6 in weblogic.

Tracking Code: TC-18615

Issue: Unable to open Global Search Index Tool [weblogic]

Description: In TeamConnect, Global Search Index Tool is not opening as expected because the version is not updated. To overcome this issue, users have to update the Search Guard to V37.

Tracking Code: TC-33868

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Issue: [TEss] [TC6.1] 'Criteria' Block is not displayed on clicking the Search icon of Company field for a contact record without providing any value in the text field.

Description: 'Criteria' Block is not displayed on clicking the Search icon of the Company field for a contact record without providing any value in the text field. Modifying the unique "order =0" value in code to change the default search views on Essentials to display the 'Criteria' block on clicking the search icon without providing any value in the text field.

Tracking Code: TC-25640

Issue: NULL is throwing on creating a custom field after creating the history for CUOB in setup.

Description: This issue has been fixed at setup process allowing users to save the Custom Field without any error.

Tracking Code: TC-33864

Issue: Custom color code is not getting updated in 'fill' attribute of icon element in page source code.

Description: Custom color code is not getting updated in 'fill' attribute to '#993399' of icon element in page source code after updating customized color profile from Admin Settings. The value '#993399' is updated in CSS and made color code 'fill' on updating the color profile.

Tracking Code: TC-12783

Issue: [TC6] Fields order is not maintained for Customizable hover over popups for contacts when a customizable search view is selected in setup.

Description: When User logins to TC6 application with all permissions and selects 'All Custom Field Types Search View' in 'Use this search view's results display for hover over' and click 'Save and Close' button and closes the setup window, User is unable to view the correct order for system objects. This issue has been fixed allowing users to see the field order for the hover over pop-up that matches the search results.

Tracking Code: TC-19286

Issue: 'Taxable Item' Check box is not displayed under 'Line Items' block for Invoice having Tax type as 'US'.

Description: In Header Information, when a user is creating a new invoice, to fill Tax Rate' field by selecting the 'US' Tax type radio button 'Taxable Item' checkbox should display in Line Items which is failed.

This issue has been fixed and Taxable Item checkbox under line items while creating invoice with Tax types as "US" is displayed in Header Information.

Tracking Code: TC-30760

Issue: [Platform] User in "Budget Settings and Fiscal year Admin" group should have Edit rights to Budget Settings

Description: When user tries to edit Budget settings without edit rights, error message displays "Budget Settings and Fiscal year Admin" group. To edit the Budget settings, users should have edit rights.

Tracking Code: TC-30016

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Issue: [6.2.4 Enterprise] [DMS Connector] [WebSphere]Getting Certificate Issue while Integrating DMS(SharePoint) to team Connect.

Description: When trying to Integrate DMS(SharePoint) in teamconnect, "Authentication failed" error is displaying. After installing the SSL certificates, displays DMS connected successfully.

Tracking Code: TC-33883

Issue: 504 Gateway time-out error when importing 10k contacts using Data Import Wizard

Description: When importing 10k contacts using Data Import Wizard, 504 gateway time-out error is displaying. The issue is because of server config.

Tracking Code: TC-33916

Issue: Deactivating Expense code with sub category is not working on Websphere instance

Workaround: As long as the child categories are disabled you can disable the parent categories

Description: The issue has been fixed and made Websphere instance working after deactivating the Expense code with sub-category.

Tracking Code: TC-33908

Issue: When Essentials module is installed from scratch, an empty invoice is not getting assigned to a project.

Description: When Essentials module is installed from scratch, an empty invoice is not getting assigned to a project. To resolve the issue, the user has to select the project and add the line item manually. This does not affect line items created in Collaborati and Synced through CSM

Tracking Code: TC-33640

Issue: AP Settings: Output/Input file download issues.

Description: User will not be able to download the output/input files from AP settings as "File path for AP Setting output location is relative to the application server"

Tracking Code: TC-33863

Issue: Time Entry Tool Setting: Scroll bar goes up and down automatically when it is in Edit Mode.

Description: Scroll bar goes up and down automatically when it is in Edit Mode and found the issue at Designated Timekeeper section in View mode and the issue has been fixed.

Tracking Code: TC-33863

Issue: Manually entered exchange rates round to the nearest thousands rather than the trillionths place.
Tracking Code: MB-5

Issue: Restarting Workflow for Multiple Failed Invoices is redirecting too many times and displays an Error Page
Tracking Code:SUPPORTPRI-54650

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Issue: Reassigning the Approval to User outside the Approval Route is not working
Tracking Code:SUPPORTPRI-54653

Issue: Approvals Page Filter 'Is Not' Operator not displaying correct results
Tracking Code:SUPPORTPRI-54656

Issue: My Workflow Processes > Reassignment Tab is loading slow when there are more than 50k users
Tracking Code: SUPPORTPRI-54880

Issue: The option “Add a New Approver after Approval” is not available when approving invoices
Tracking Code: SUPPORTPRI-55495

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