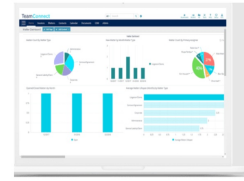**Manuals+** — User Manuals Simplified.

MITRATECH 7.0 TeamConnect Enterprise Software

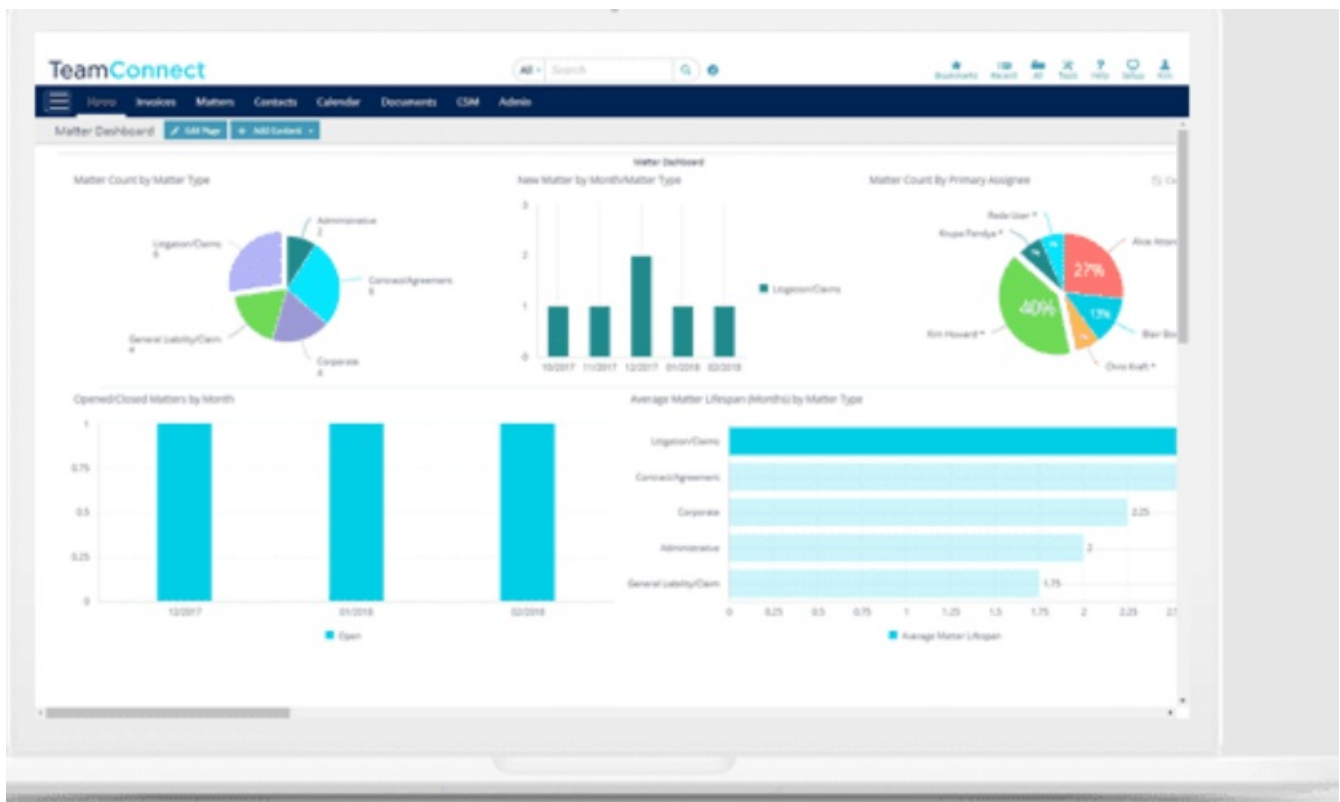# MITRATECH 7.0 TeamConnect Enterprise Software User Guide

Contents

MITRATECH

MITRATECH 7.0 TeamConnect Enterprise Software

Specifications

- Product Name: TeamConnect 7.0
- Compatible Systems: Refer to Installation Requirements in the TeamConnect Enterprise 7.0 Installation Guide
- Upgrade Compatibility: TeamConnect versions 5.0 to 6.3 can be upgraded to TeamConnect 7.0
- Compatible Modules:
  - AP Link 5.1
  - TC Business Intelligence 6.3.0
  - Collaborati Spend Management (CSM) 7.0
  - 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 7.0
  - TC Essentials 6.3.1
  - TeamConnect-TAP Integration 1.1
- Support: Websphere Liberty 21, WebLogic Server, Elasticsearch, App Servers, etc.

Product Usage Instructions:

System Requirements Check:
Before installing TeamConnect 7.0, ensure that your system meets the requirements specified in the Installation Guide.

Upgrade Considerations

- Ensure component libraries are periodically updated for performance, sustainability, and security reasons.
- Update the configuration file in WebLogic Server for access to the Screen Designer module.

New Features:
The new features include:

- **Invoice IQ Module Enhancement:** Enhances invoice review timelines with machine learning recommendations.
- **Spring Framework Update Improvement:** Updates the underlying Spring framework to improve performance.
- **Invoice Review Enhancement:** Enhances the Days Since Received widget for better usability.

Frequently Asked Questions (FAQ):

- **Q: Can TeamConnect 7.0 be installed on any operating system?**

  A: TeamConnect 7.0 compatibility depends on the system requirements mentioned in the Installation Guide.
- **Q: How can I upgrade from TeamConnect version 5.x to TeamConnect 7.0?**

  A: Follow the upgrade instructions provided in the upgrade documentation for a smooth transition.
- **Q: Is there a support center available for assistance with TeamConnect 7.0?**

  A: Yes, you can contact **support@mitratech.com** or visit **www.mitratech.com** for assistance and support.

This document details the upgrade information, new features, resolved issues, and known issues that are included in TeamConnect Enterprise® 7.0

System Requirements

Before you begin to install TeamConnect 7.0, ensure that your system meets the requirements. For a full list of requirements, refer to the Installation Requirements in the TeamConnect Enterprise 7.0 Installation Guide.
The following versions of TeamConnect can be upgraded to TeamConnect 7.0

- 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 is designed to pair with the following versions of modules (notes below reflect the available versions as of the TeamConnect 7.0 release date):

- AP Link 5.1
- TC Business Intelligence 6.3.0
- Collaborati Spend Management (CSM) 7.0
- 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 7.0
- TC Essentials 6.3.1
- TeamConnect-TAP Integration 1.1
- Please visit the 3rd Party Software Matrix for version compatibility information for Elasticsearch, App Servers, etc.

Upgrade Considerations
As part of Mitratech maintenance processes, component libraries (Spring Framework updated to v5.3.20) are periodically updated for performance, sustainability, and security reasons. For more information, refer to the article – Action Needed to Ensure a Successful Upgrade.

- Supports Websphere Liberty 21
- Update the configuration file in WebLogic Server to allow access to the Screen Designer module. For more information, refer to the link.

Following modules are rolled out along with the release and are required to be upgraded to work with TeamConnect Enterprise® 7.0:

- Collaborati Spend Management 7.0
- Data Warehouse 7.0
- Service of Process (SOP) Manager 7.0

New Features

The list of new features is described below. The following new or updated articles have been published in the Client Success Center to accompany this release:
The following new features have been released in the TeamConnect Enterprise® 7.0. Each feature is documented in the following format:

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

Invoice IQ Module

Enhancement: Introducing "Invoice IQ" module
Description: This new module improves invoice review timelines and provides potential adjustment opportunities through machine learning recommendations on line items; activity categorization; custom rules; GC, AGC and compliance dashboards using TCBI.
Tracking Code: TC-42015, TC-42020, TC-40890

Spring Framework Update
Improvement: Spring Framework Update

Description: The underlying Spring framework upon which TeamConnect is built has been updated from Spring Version 3.2.18 to Spring Version 5.3.20. For more information on impacted libraries, refer to the Link.
Tracking Code: TC-41028

Invoice Review

Enhancement: Revisit the "Days Since Received" widget to accommodate low number invoices as well (<100). Description: When a user clicks on any of the sections in the widget, the filter applies in the below grid and dynamically changes with the Maximum value being the Higher Nearest multiple of 4 for the selected range. Click here to learn more.

Tracking Code: TC-40767
Enhancement: Remove the Toggle that activates Interactive Grid for 'My Approvals'. Description: Removed the toggle that enables the Interactive Grid for My Approvals. The Interactive Grid & Widgets will be loaded once an Interactive Search View is designated for 'My Approvals' in Setup. If there is no search view selected for 'Workflow Approvals' in setup, we must show the Legacy Grid.

Tracking Code: TC-40856

Enhancement: Interactive Grid to follow the color profile setup at Admin Level Settings.
Description: Interactive grid is provided with color profile setup at Admin level settings.

- Custom color profile classes may have an impact on padding, spacing, and width.
- The buttons are updated with custom color changes.

Tracking Code: TC-41041
Enhancement: Persisting Interactive Grid Columns after loading them from the Search View. Description: If the Search View specified in 'Setup' is changed, the columns of the New Search View will be loaded and no persisted columns of previously specified search views will be stored. The user needs to store the column configuration & column order in the DB for each TC user.
Tracking Code: TC-40084
Enhancement: Interactive grid multi-list column filtering.
Description: Allows users to enter a comma-separated(,) string for multiple select fields in the Interactive grid in a list of multiple items. When the text is matched to the given values on any

Line Item, the matched string is highlighted in 'Yellow'. The search operation is performed only when a user enters 2 or more characters.
Tracking Code: TC-40964
Enhancement: Formatting different columns in the Interactive grid (Date, Number, Percentage, Currency, String).
Description: The below changes updated in the Interactive grid:

- The updated date format is obtained from the Results Display section of the respective search view.
- Displays both date and time in the grid, if the format is selected as Data and Time.
- Modified the text to the column 'Invoice Type' (Standard/Accrual/Shadow etc.,), e.g., 1st Alphabet capitalized.

Tracking Code: TC-40918Enhancement: Original Rate, Original Discount & Original Total fields to be added to System Fields Dropdown.
Description: Updated the existing Legacy Search Views by mapping the below fields to the System fields drop-down:

- Original Rate
- Original Discount
- Original Total fields.

Tracking Code: TC-41001

Enhancement: Testing Email Digest Links to the 'My Approvals' page.
Description: In the Email Digest Links section displays an error message if either of the columns Approval Days left/Due Date or Invoice Amount or Date Received is not added on the Results display of the My Approvals.

Tracking Code: TC-41040

Enhancement: Load All Line Items on an Invoice.
Description: Provide an Invoice by loading all line items on both the View page & Edit page.
Tracking Code: TC-41025

Enhancement: Create a new 'Has Adjustments' modal with Revert button & Make Adjustment button for Invoice details page.
Description: Introduced a new 'Has Adjustments' modal where the users can click on the cell in the 'Has Adjustments' column and a new Adjustments History modal is visible. The users from the Approval list can edit/adjust the invoices. The modal also has a Revert button when clicked, the Adjustment History modal is closed & the interactive popup displays, where users can revert an adjustment. This modal will only be visible from the Interactive Grid.
Tracking Code: TC-42064
Enhancement: Reverted adjustments should also be shown on the Has Adjustments popup. Description: Introduced the Revert button in the Has Adjustments popup. The functionality of the Revert button is to display the original Adjustments (before changes). The Revert button is disabled if the current values on the line item are the same.
Tracking Code: TC-42363

Idea Portal

The following feature ideas are taken from Idea portal or direct client feedback.. We have implemented these ideas in the TCE 7.0 release:
Enhancement: Changes to invoice approval workflow functionality in TeamConnect. Description: Introduced a stop level check box named "A valid approver must be available on this step". It can be enabled at the stop level based on the user workflow, and the user can choose if they need a valid approver or avoid it on the workflow if a valid approver is not required. For more information, refer to the link.

Tracking Code: SUPPORTPRI-63820
Enhancement: Create, read, update, search and delete operations for Non-US tax features on 4. x API.
Description: Introduced "create, read, update, search and delete" operations for non-US tax by implementing them through 4.x API.

Features

- Provide methods to get type of Non-US tax (Summary vs Line_Item Level):
    - Both methods return false if "isHasNonUSTax=false"
    - Both methods can never return true at the same time.
- Provide methods to set summary or line item level tax type.
- Allow searching for all invoices that have Non-US Tax:
    - Add "Invoice.HAS_NON_US_TAX" SystemSearchField.
- Allow searching for invoices that have summary level taxes:
    - Add "Invoice.IS_NON_US_TAX_SUMMARY_LEVEL" SystemSearchField. 5001 Plaza on the Lake, Suite 111, Austin, TX 78746 p: 512.382.7322 e: **support@mitratech.com** **www.mitratech.com** 2
- Allow searching for invoices that have line item level taxes:

- No additional API is required for this. It would be a combination of the two above criteria (ANDed).
- Provide a method to get a list of Non-US taxes for a line item.
- Provide methods to add/remove/update line-Item level Non-US tax.
- Allow searching for invoices that have Non-US tax code of a specific type:
    - Add "Invoice.NON_US_TAXES" SystemSearchField for summary level taxes
    - Add "Invoice.NON_US_TAX_RATES" SystemSearchField for line item level taxes
    - Add "InvoiceNonUSTax.PROJECT" SystemSearchField
    - Add "InvoiceNonUSTax.AMOUNT" SystemSearchField
    - Add "InvoiceNonUSTaxRate.RATE" SystemSearchField.

Tracking Code: SUPPORTPRI-63701
Improvement: Change option to share version details & environment details in TeamConnect to "On" by default.
Description: By default, the Send Installed Product Information to Mitratech on Application Startup checkbox and Include Detailed Environment Information In Addition to Installed Product Information checkbox are enabled from this release. Click here to learn more.
Tracking Code: TC-42563
Enhancement: Load Interactive Grid based on Search View designated for 'Approvals' on My Approvals page.
Description: Interactive grid is loaded based on the Search View designated for 'Approvals' in Setup on the Invoice Object.

Following changes are implemented to improve Search View usability:

1. "Due Date/Approval Days Left" column is not configurable in the Results Display and is automatically added to the Interactive Grid on the 'My Approvals' page irrespective of the Search View designated.

2. A default OOTB Search view is designated for the Workflow Approvals screen called 'Approvals Screen'.

3. The 'Peek-In' option is visible to users only if they have access to it, which is cascaded from the security permissions on the User Group.

Tracking Code: TC-40080
Enhancement: Filtering Columns in the Interactive Grid for My Approvals page.
Description: Provided ability for the user to filter the columns (Date, Numer, String Object Links, List, Multi-Value List (only string fIlter), Checkbox) in the Interactive Grid.
Tracking Code: TC-40087

Enhancement: Load All Invoices on My Approvals page which are in a users Approval Queue. Description: Provide ability to load All the Line Items on an Invoice [5,000 Line Items] and All Invoices in a user's Approval Workflow [1,000 Invoices] on My Approvals page which are in users Approval queue.
Tracking Code: TC-42036
Enhancement: Functionalities of All buttons above the Grid for My Approvals page. Description: Provided functionalities to all the buttons [Send for Review, Reject Selected, Approve Selected, Reset Columns & Clear All Filters] located above the Grid.
Tracking Code: TC-40088
Enhancement: Interactive grid multi-list column filtering for My Approvals page.
Description: Introduce comma(,) as part of the Search string for the values that are multi-select fields. The search result is highlighted in Yellow. A Tooltip text Filter by two or more values by using a comma(,) to separate values is updated to identify that a field has the multi-search feature. For more information, click here.
Tracking Code: TC-42037
Enhancement: Remove the Vertical Scroll in the Horizontal Panel for My Approvals page. Description: Removed the Scroll within the Description, Horizontal Pane (Adjustments), for all screen sizes & all resolutions.
Tracking Code: TC-42046
Enhancement: Column width auto-sizes to accommodate longest content across all line items in the Invoice details Page and My Approval Page.

Description: Following changes are implemented to improve the Invoice of the Interactive grid:

- The columns are updated with Auto-size to accommodate the correct width to be visible on the screen.
- The Sticky Horizontal Scroll bar is visible on the screen when the width of all the combined columns exceeds the size of a screen.
- When the user resizes a column to a size where the system fails to display the full content, the Ellipsis option appears in that line item.

Tracking Code: TC-42060, TC-42059
Enhancement: Added Sticky horizontal scroll in the Invoice details Page and My Approval Page.
Description: Introduced Sticky horizontal scroll which displays:

- If any column is manually re-sized and all the columns fail to display in the overall grid width, then a sticky horizontal scroll is visible at the page level.
- If the adjusted width of the combined columns is less than the width of the grid, the floating horizontal scroll bar is displayed.

Tracking Code: TC-42062, TC-42063
Enhancement: Hover Over on the Adjustment Icon to show the Latest Adjustment in the Invoice details page.
Description: Following changes are implemented to improve the Adjustment column:

- On Hovering on the icon/cell in the Adjustment icon, the system displays a tooltip as below
  - The Latest Adjustment made to the Line Item
  - The Count of No. of Adjustments on the Line Item
  - No Ellipsis to display for the Comments.

For more information, click here.
Tracking Code: TC-42098
Enhancement: Show/Hide Adjustments in the Invoice Printable View. Description: Following changes are implemented in the Printable View:

- To configure the Printable View, 'Show Adjustments' checkbox is added on the pop-up window.
- By default, the checkbox is unchecked.
- The checkbox is visible only when the Interactive Line Items block is added in the Invoice Object view.

For more information, click here. Tracking Code: TC-42174

Resolved Issues

The following items have been resolved in the TeamConnect Enterprise® 7.0 release. Each issue is documented in the following format:

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

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

included in this update:

- **Issue:** System Error is displayed while navigating to Global Search Page for a user with rights to only few objects
- **Description:** When a user (with only access to documents, contact, and preferences) performs the global search or clicks on the search tab, a system error is displayed instead of the search page.
- **Tracking** Code: SUPPORTPRI-64652
- **Case** Number: N/A
- **Initial** Fix Version: TCE 6.3.7
- **Issue:** "Record out of sync" appears when creating & modifying an appointment through Outlook.
- **Description:** A pop-up error message appears, indicating that the record is out of sync and that the calendar must be synced.
- **Tracking** Code: SUPPORTPRI-64516
- **Case** Number: 2022-0511-928646
- **Initial** Fix Version: TCE 6.3.5 Patch 11
- **Issue:** Invoice header adjustment via API is not updating the adjustment reason on the lineitem, and adjustment source is incorrect.
- **Description:** Following are the issues found:1) The adjustment reason is not saved to line-item adjustment. 2) The adjustment source on the line-item shows as "Manual" instead of "System" as code is running as system user.
- **Tracking** Code: SUPPORTPRI-64319
- **Case** Number: 2022-0103-874432
- **Initial** Fix Version: TCE 6.3.3 Patch 15
- **Issue:** Session timeout confirmation pop-up is not occurring as expected when the page is idle. Description: When the page is idle, it does not display any session timeout confirmation pop-ups and instead redirects to the login page for standard login and the home page for SSO. Tracking Code: SUPPORTPRI-64309
- Case Number: 2022-0425-921015
- Initial Fix Version: TCE 6.3.6 Patch 1
- Issue: Interactive line item date filter not considering locale settings.
- Description: It does not return line items with exact service dates results. To obtain the desired results, we must search by (MM-DD) as specified in the locale settings.
- Tracking Code: SUPPORTPRI-64183
- Case Number: 2022-0509-927262
- Initial Fix Version: TCE 6.3.3 Patch 18
- Issue: When a user is trying to save a search view with condition "Has no value", it is changing to "is" automatically.
- Description: When a user attempts to save a search view with the condition "Has no value," the workflow action field is automatically saved with "is."
- 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.
- Description: Each post-commit rule is triggered twice rather than once. Furthermore, the phase change rules were not filtered based on the phase transition.

- Tracking Code: SUPPORTPRI-64129
- Case Number: 2022-0223-895879
- Initial Fix Version: TCE 6.3.6 Patch 1
- Issue: Workflow enumeration not filtering workflow status correctly in API.
- Description: The output is pending invoices instead of approved invoices with the workflow having approved status.
- Tracking Code: SUPPORTPRI-64067
- Case Number: 2022-0404-912877
- Initial Fix Version: TCE 6.3.7
- Issue: Can't export Embedded Object search results.
- Description: When the user attempts to export embedded object search results, an error message is shown as "java.net.ProtocolException: Unsupported protocol: https".
- Tracking Code: SUPPORTPRI-64060
- Case Number: 2021-1129-862880
- Initial Fix Version: TCE 6.3.3 Patch 15
- Issue: Search > Search Results are incorrect when searching for a Custom Date Field using the Between criteria.
- Description: When searching for a Custom Date Field using the "Between" criteria after navigating to Search > Search Results, incorrect search records were returned.
- Tracking Code: SUPPORTPRI-63874
- Case Number: 2021-1104-854294
- Initial Fix Version: TCE 6.3.3 Patch 17
- Issue: REST GET on object with user missing rights throwing PDE, causing 500 responses. Description: If a user is missing View Project Invoice Relations permission (as an example, there are multiple places where the serializer can get handed a SecuredList), and a relation exists on a project, then that user will not be able to retrieve that project through the REST API.
- When an object attribute to be serialized is a SecuredList, then it should be transformed into a serializable value that still respects the security rights.
- In this case, the user doesn't have rights to something that is included in the results and running into the same error with custom fields that are missing rights as well.
- Tracking Code: SUPPORTPRI-63865
- Case Number: N/A
- Initial Fix Version: TCE 6.3.7
- Issue: Global Search highlighting shows Social Security Number.
- Description: The Social Security Number should not be highlighted in Global Search results. Tracking Code: SUPPORTPRI-63821
- Case Number: 2022-0425-920985
- Initial Fix Version: TCE 6.3.5 Patch 8
- Issue: Prevents leaking web service calls from the Outlook plugin.
- Description: A status of "204 No Content" is returned, indicating that the version check failed and the plugin was successful in modifying the appointment in TC while it was out of sync.
- Tracking Code: SUPPORTPRI-63813
- Case Number: N/A

- Initial Fix Version: TCE 6.3.5 Patch 6Issue: SystemSearchField("approvalStatus", ApprovalStatus.class, EnterpriseEntity.class) not correct – approvalStatus is not correct.
- Description: "SystemSearchFieldAPPROVAL_STATUS=newSystemSearchField("approvalStatus_statusIID", ApprovalStatus.class, EnterpriseEntity.class);" is the correct input.
- Incorrect search field path in "com.mitratech.teamconnect.enterprise.api.model.EnterpriseEntity. java". The field should be set to "approvalStatus_statusIID" and not "approvalStatus".
- Due to this, the action fails to display invoices with approved status logs.
- Tracking Code: SUPPORTPRI-63770
- Case Number: 2022-0308-901582
- Initial Fix Version: TCE 6.3.7
- Issue: No way in 4.x API to bypass the rule execution for a particular transaction. Description: In 3.x API, the method to bypass rule execution for a transaction is given as "UnitOfWork uow=FNClientSessionManager.acquireUnitOfWork(); uow.setProperty(UnitOfWorkProperty.DO_NOT_RUN_RULES_ON_UOW, "true");". This method is missing in the 4.x API.
- Tracking Code: SUPPORTPRI-63700
- Case Number: N/A
- Initial Fix Version: TCE 6.3.7
- Issue: No API Class in 4.x API for CustomBlocks to call a method in Java without refreshing the Page.
- Description: For dependent drop-downs, the page reloads every time when the user changes the value in drop-down. This issue has been resolved and enables the dependent drop-down to work without the need for reloading the page.
- Tracking Code: SUPPORTPRI-63699
- Case Number: N/A
- Initial Fix Version: TCE 6.3.7
- Issue: No Method to get phase name for a custom object record in 4.x API.
- Description: In 3.x API, the method to get phase name for a custom object record is given as "TNProject.getCurrentPhaseType().getName()". This method is missing in the 4.x API.
- Tracking Code: SUPPORTPRI-63698
- Case Number: N/A
- Initial Fix Version: TCE 6.3.7
- Issue: No Method to remove User from a group in 4.x API.
- Description: In 3.x API, the method to remove a user from a group is given as "**com.mitratech.teamconnect.entity**.YNGroup.removeUser(YNUser arg0)". This method is missing in the 4.x API.
- Tracking Code: SUPPORTPRI-63695
- Case Number: N/A
- Initial Fix Version: TCE 6.3.7
- Issue: Auto Populate feature missing for custom object search module.
- Description: The search field does not display a list of country names as a prompt (Auto populate). Hence, Auto-populate is not working.
- Tracking Code: SUPPORTPRI-63525
- Case Number: 2022-0228-897405

- Initial Fix Version: TCE 6.3.3 Patch 13
- Issue: Unable to GET/PUT time independent date fields value using REST API.
- Description: The GET request should return the value of the date field and the PUT request should be able to update the date field. But this method is not working via REST API.
- Tracking Code: SUPPORTPRI-63460
- Case Number: 2021-0302-748660
- Initial Fix Version: TCE 6.3.7
- Issue: System error when trying to login using a bookmarked URL.
- Description: This issue is resolved by showing the home page in null context instead of an error page.
- Tracking Code: SUPPORTPRI-63083
- Case Number: 2021-1203-865205
- Initial Fix Version: TCE 6.3.7
- Issue: GlobalSearch – Involved records are indexed even if definition is selected to be omitted. Description: Even if the definition is set to be omitted, involved records are indexed as a part of the project.
- Tracking Code: SUPPORTPRI-63003
- Case Number: N/A
- Initial Fix Version: TCE 6.2.6 Patch 11
- Issue: My Approvals throws system error for normal users when private records exist and app.dontUseSecurityViews=Yes.
- Description: When private records exist, My Approvals generates a system error for normal users and app.dontUseSecurityViews=Yes.
- Tracking Code: SUPPORTPRI-62966
- Case Number: 2022-0208-889363
- Initial Fix Version: TCE 6.3.5 Patch 9
- Issue: Reassignment tool issue – Inactive assignee on the matter should still be inactive after it is reassigned.
- Description: The reassignment tool has a defect in which an inactive assignee on the matter is changed to an active assignee after it is reassigned. The correct output is that an inactive assignee on the matter should still be inactive after it is reassigned.
- Tracking Code: SUPPORTPRI-62763
- Case Number: 2021-1004-839478
- Initial Fix Version: TCE 6.2.8
- Issue: Changing line item from fee to expense or vice versa for manual invoices does not reflect in invoice summary.
- Description: When a user changes a line item from fee to expense or vice versa for a manual invoice, the change is not reflected in the invoice summary.
- Tracking Code: SUPPORTPRI-62706
- Case Number: 2021-1208-866797
- Initial Fix Version: TCE 6.3.6 Patch 1
- Issue: Invoices – If there are separate accounts to track invoice line items and Non-US taxes, then the invoices with Non-US taxes at line item level fail to post.
- Description: If there are separate accounts for tracking invoice line items and Non-US Taxes, invoices with Non-US taxes at the line item level fail to post.
- Tracking Code: SUPPORTPRI-62615

- Case Number: 2021-0227-746026
- Initial Fix Version: TCE 6.2.7 Patch 4
- Issue: Object with zero records when indexed showing as "Indexing failed" instead of "0". Description: When indexed, an object with zero records displays "Indexing failed" rather than "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.
- Description: The workflow entry for the document deletion request to approve exists in both "Approvals" and "Workflow processes", with the requester name in the requester column as "System, System" rather than "user A, user A".
- Tracking Code: SUPPORTPRI-62576
- Case Number: 2021-0505-776572
- Initial Fix Version: TCE 6.2.8 Patch 1
- Issue: "Error During Evaluation of the Route. Null" when an Accrual Invoice is Posted. Description: Getting an error as "Error During Evaluation of the Route. Null" while Posting an Accrual.
- Tracking Code: SUPPORTPRI-62570
- Case Number: N/A
- Initial Fix Version: TCE 6.3.7
- Issue: Native report filter on invoice current approver does not work.
- Description: The report does not return invoices where selected contact is the current approver.
- Tracking Code: SUPPORTPRI-62484
- Case Number: 2021-1105-855004
- Initial Fix Version: TCE 6.2.7 Patch 5
- Issue: Search > The "Not Equal To" criteria does not return records that contain NULL values when searching on a list field.
- Description: When the user navigates to Search > the "Not Equal To" criteria does not check for records that contain a NULL value in the custom field.
- Tracking Code: SUPPORTPRI-62480
- Case Number: 2021-1105-854722
- Initial Fix Version: TCE 6.2.6 Patch 10
- Issue: Object validation error on adding a contact to embedded object record that has private contact relations.
- Description: When a contact is added to a contact centric embedded object's record for which there is private contact in relations with the same relations as public contact in relations,
- an object validation error occurs.
- Tracking Code: SUPPORTPRI-62475
- Case Number: 2021-0510-778574
- Initial Fix Version: TCE 6.2.8
- Issue: CJB Vendor Contact information not updated when Contact is updated.
- Description: When the Vendor Contact name is changed, the Custom Block is not updated. Tracking Code: SUPPORTPRI-62393
- Case Number: 2021-0818-820022
- Initial Fix Version: TCE 6.2.7 Patch 2

- Issue: FY22 APT – TeamConnect – Missing Security-Related HTTP Headers – Informational. Description: In request headers, the "Content-Security-Policy" and "Strict-Transport-
- Security" headers are not available.
- Tracking Code: SUPPORTPRI-62278
- Case Number: N/A
- Initial Fix Version: TCE 6.2.8
- Issue: Audit rule history is not capturing the Custom field name and Updated details. Description: When the user clicks on the History record under the description, the modification details are not displayed.
- Tracking Code: SUPPORTPRI-62128
- Case Number: 2021-0902-826811
- Initial Fix Version: TCE 6.2.6 Patch 9
- Issue: Large Native Reports Fail in TCE 6.2.5 Patch 2.
- Description: Report causes a stuck thread in the TC application and times out.
- Tracking Code: SUPPORTPRI-61642
- Case Number: 2021-0528-786893
- Initial Fix Version: TCE 6.2.5 Patch 6
- Issue: Users can access the page without authentication after logging out when the back button is pressed.
- Description: When a user clicks the back button, they are taken to the list of matters (or whatever screen they were on just before logging out) without having to log in.
- Tracking Code: SUPPORTPRI-61084
- Case Number: 2021-0624-797391
- Initial Fix Version: TCE 6.2.8
- Issue: Active date on involved record for objects changes back to current date irrespective of date entered by user.
- Description: If the "Active Date" is changed after a user adds a new involved party to a matter, the change will not take effect. This is because, after entering all the necessary information and clicking "Finish", the involved party tab's newly added record reflects the day the involved party was added rather than the manual date the user entered. Hence, the active date changes back to the current date.
- Tracking Code: SUPPORTPRI-59304
- Case Number: 2021-0323-758122
- Initial Fix Version: TCE 6.2.8
- Issue: Issue with getting Adjustment reason in custom block.
- Description: The error with adjustment reason was fixed in "enterprise-api-legacy-impl.jar" and it needs to be implemented in "enterprise-api-model-impl.jar" as well.
- Tracking Code: SUPPORTPRI-51885
- Case Number: 2019-0823-549141
- Initial Fix Version: TCE 6.3.7
- Issue: Second adjustment made via code not reflecting on UI.
- Description: Second adjustment made via code not reflecting on UI. Both the adjustments should be reflected on the lineitem.
- Tracking Code: SUPPORTPRI-49783
- Case Number: 2018-1228-497797
- Initial Fix Version: TCE 6.3.7

- Issue: getGroupRights() method for GroupAccount throwing null pointer exception. Description: "getGroupRights()" method should not throw a null pointer exception.
- Tracking Code: SUPPORTPRI-46615
- Case Number: 2019-0213-507216
- Initial Fix Version: TCE 6.3.7
- Issue: Unable to get previous state of user via 4.X APIs.
- Description: When creating a custom code using 4.X TC APIs, the number of groups after updating (adding a new group) the user remains the same when compared to the previous state of the user.
- Tracking Code: SUPPORTPRI-45905
- Case Number: 2018-1218-496477
- Initial Fix Version: TCE 6.3.7
- Issue: Error retrieving project assignee role using 4.x APIs.
- Description: Error is shown in the logs that "No LookupTable for name: LProjAssigneeType". The assignee roles should be added for a matter in the setup side.
- Tracking Code: SUPPORTPRI-45591
- Case Number: 2018-1130-493062
- Initial Fix Version: TCE 6.3.7
- Issue: REST API for custom fields not returning all fields.
- Description: The issue is if two custom fields have the same label, only data for one of the custom fields is returned when using the REST API. This is resolved if the data for all the custom fields on the object is returned.
- Tracking Code: SUPPORTPRI-45356
- Case Number: 2018-1211-495014
- Initial Fix Version: TCE 6.3.7
- Issue: The user is not able to get the document parent object for history record through TeamConnect API code.
- Description: The user is not able to get the parent object of History record if the parent object is Document.
- Tracking Code: SUPPORTPRI-45216
- Case Number: 2018-1129-492659
- Initial Fix Version: TCE 6.3.7
- Issue: Issue getting category Involved custom field.
- Description: User is not able to retrieve a category Involved custom field value through CJB. Tracking Code: SUPPORTPRI-44841
- Case Number: 2018-1121-491541
- Initial Fix Version: TCE 6.3.7
- Issue: Unable to get history records for the documents using a Custom Block in 4.x API. Description: The user is unable to fetch History records for Documents in a Custom Block using 4.x API as an exception is thrown. An exception is thrown for the below line used in the code: "List histories = platform.getHistoryService().getHistories(doc);".
- Tracking Code: SUPPORTPRI-44797
- Case Number: 2018-1119-491050
- Initial Fix Version: TCE 6.3.7
- Issue: Not able to set the Adjustment type in 4.x API.

- Description: The user has raised a concern that the information of the source of adjustment could be added using 4x API. Currently, there are no methods providing functionality to add the information on adjustment, if the adjustment is done manually or by system.
- Tracking Code: SUPPORTPRI-37722
- Case Number: 2018-0406-443298
- Initial Fix Version: TCE 6.3.7
- Issue: TC 4+ System Error – Setting User Account Expire Date through the API breaks. Description: The user is unable to populate the "Account Expires On" field on the using TC 4.x API.
- Tracking Code: SUPPORTPRI-31711
- Case Number: 2017-0905-395972
- Initial Fix Version: TCE 6.3.7
- Issue: 4.x API ProjectService search by searchView not working.
- Description: In the 4.x API, when searching for Projects using an existing search view ignores the uniqueCode argument and returns all types of Projects. Due to this, in logs the result obtained is not object specific.
- Tracking Code: SUPPORTPRI-27826
- Case Number: 2016-1213-293555
- Initial Fix Version: TCE 6.3.7

Known Issues

The following items are known issues in the TeamConnect Enterprise® 7.0 release. Each issue is documented in the following format:

- A description of the issue
- Internal tracking code

Issue: Records per page in Search views are impacted by Recently viewed count.
Tracking Code: TC-42716
Issue: Date column filter allows the user to enter date manually
Tracking Code: TC-42527
Issue: 'Cancel' button functionality is not working on Modify search screen
Tracking Code: TC-43484
Issue: Error Message for In-House Comments is not displayed although it is a mandatory field Tracking Code: TC-42462
Issue: Global search index tool fails to load with error after deleting an object definition Workaround: Remove the "offending" object from Elasticsearch index manually.
Tracking Code: TC-43256
Issue: "Use stored template" is not displayed as Checkbox on "Select Budget Template" page Tracking Code: TC-42169

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Documents / Resources

MITRATECH 7.0 TeamConnect Enterprise Software [pdf] User Guide
7.0 TeamConnect Enterprise Software, TeamConnect Enterprise Software, Enterprise Software, Software

References

- **∧ Mitratech | Empower. Automate. Elevate.**
- **Home - Mitratech Success Center**
- **Ideas for TeamConnect & eBilling**
- **User Manual**