

MITRATECH

TeamConnect 8.0

Hype Video



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Release Webinar: TeamConnect 8

November 12, 2025

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Housekeeping

- Webinar recording and slides will be emailed following the session
- Questions at the end and you can type questions into the Q&A as we go
- Please look out for our post-webinar survey

Meet the Team



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Today's Agenda

- Introduction to TeamConnect Version 8
- ARIES™ with New User Experience
- InvoiceIQ Learning Lab
- Outlook 365 Add-in Mobile with New Invoice Approval
- ARIES™ Non-LEDES Invoice Capture – International
- Tax Authority eBilling Processes
- Modern Security and Support
- Integrated SAML/SSO
- Coming Soon!
- Preview: New TeamConnect Portal

TeamConnect v8: Your Voice Matters!



Security-Focused AI-Powered



8 New Ideas!

TeamConnect 8.0 delivers impact through cutting-edge platform and security upgrades, enriched by client-driven innovation and powerful AI capabilities.

[Be part of shaping the TeamConnect roadmap by sharing your ideas](#)



Framework, JDK, and SAML/SSO Updates

Platform updates to fortify security and extend support; SAML-SSO now built into the platform; JDK 21 support



Outlook 365 Add-in

Even more features, and now on mobile! Create matters, manage documents, and view/update appointments & tasks via O365 mobile apps + NEW invoice review feature



ARIES – AI Digital Assistant

ARIES™ transforms data exploration with natural language queries—empowering faster decisions and eliminating the hassle of manual reporting.



More Ideas

- Update Matter Open/Close via REST API
- Logger timeouts and audits
- Better support for non-US Tax calculations



International Tax Support

Ensure clients and firms leverage the benefits of TeamConnect and Collaborate eBilling while following proper tax jurisdictional laws.



Non-LEDES Invoice Capture – International

Move towards 100% e-billing data capture for international firms and non-US vendors aren't familiar with complicated LEDES invoice files.

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ARIES™ 2.0

Instant insights at your fingertips – ARIES™ turns everyday users into data analysts by answering business questions in plain language, cutting reporting time from hours to seconds.

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ARIES™ in Action

What firm billed the most in 2025?

Ask questions in natural language

Vendor Name	Total Billed
GATES & BARKER LLP	\$ 2,829,223.66

Receive answers as tabular data

◆ Explanation

I have queried the invoice details to find the top vendor with the highest total billing for the year 2025. I filtered the results to include only 'POSTED' invoices of specific types (STANDARD, CREDIT NOTE, APPEAL INVOICE), calculated the total billed amount per vendor, and selected the vendor with the highest total billing. The result is formatted to display the vendor name and total billed amount in US dollars with comma-separated thousands.

Clear explanation of the query

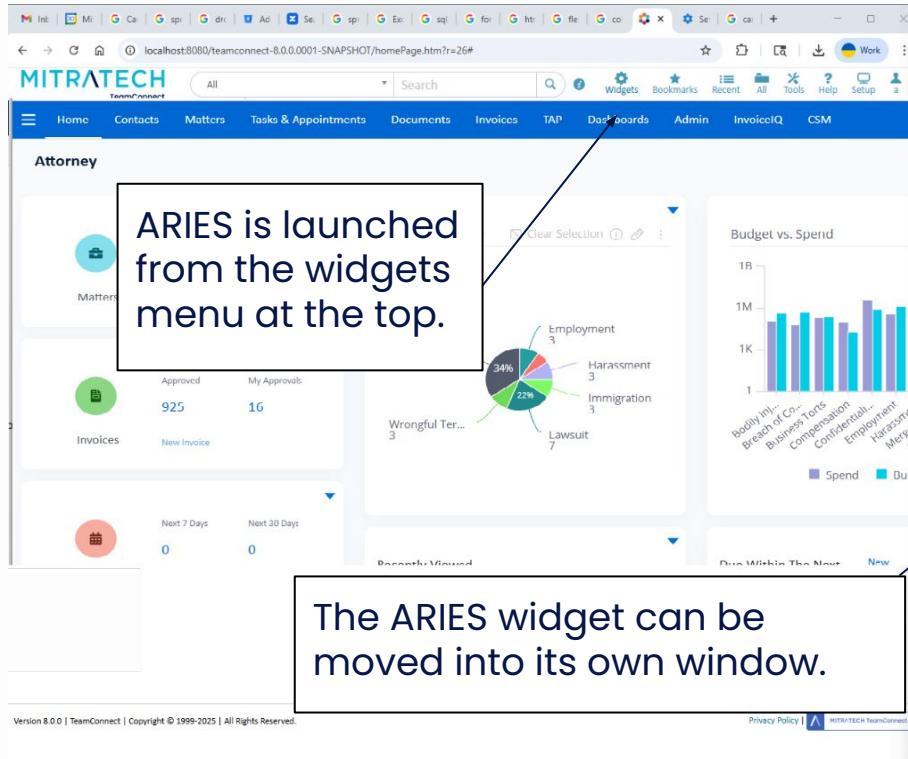
◆ Ask ARIES™ ...



Ask the next question

Please exclude personal and HIPAA data from your questions.

ARIES™ 2.0



localhost:8080/teamconnect-8.0.0.001-SNAPSHOT/homePage.htm?r=26#

MITRATECH TeamConnect

Attorney

ARIES is launched from the widgets menu at the top.

Widgets

Matters

Approved: 925, My Approvals: 16

Invoices

New Invoice

Next 7 Days: 0, Next 30 Days: 0

Wrongful Ter...

34% Employment, 22% Harassment, 22% Immigration, 12% Lawsuit

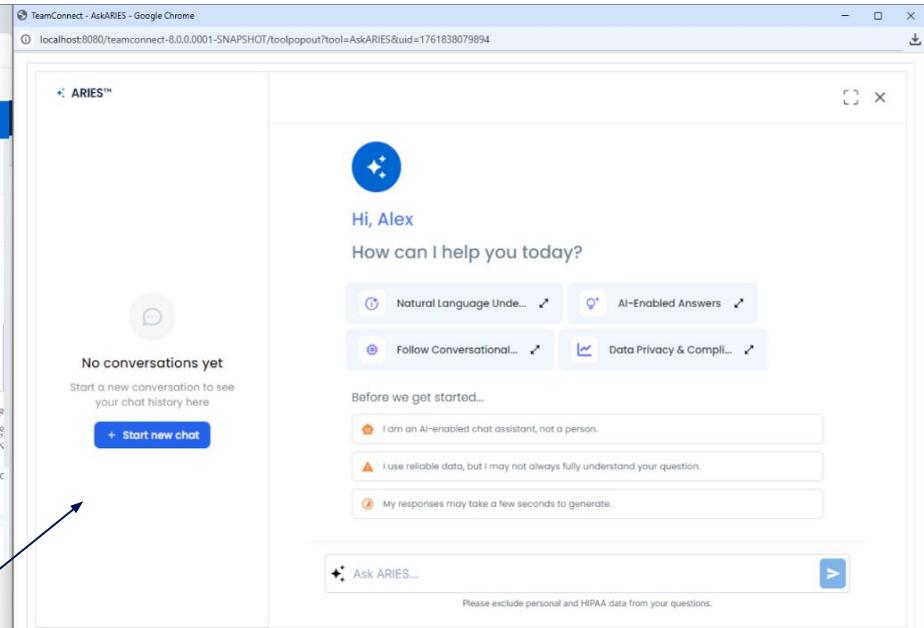
Budget vs. Spend

Bar chart showing Budget vs. Spend for various categories. The Y-axis is logarithmic, ranging from 1 to 1B. The X-axis categories are: Bodily Inj., Breach of Co., Business Torts, Confidential., Employment., Harassme..., and Merge. The legend indicates Spend (blue bars) and Budget (cyan bars).

Due Within The Month

Privacy Policy | MITRATECH TeamConnect

Version 8.0.0 | TeamConnect | Copyright © 1999-2025 | All Rights Reserved.



localhost:8080/teamconnect-8.0.0.001-SNAPSHOT/toolpopup?tool=AskARIES&uid=1761838079894

ARIES™

Hi, Alex

How can I help you today?

Natural Language Under... | AI-Enabled Answers

Follow Conversational... | Data Privacy & Compli...

No conversations yet

Start a new conversation to see your chat history here

+ Start new chat

Before we get started...

I am an AI-enabled chat assistant, not a person.

I use reliable data, but I may not always fully understand your question.

My responses may take a few seconds to generate.

Ask ARIES...

Please exclude personal and HIPAA data from your questions.

Availability

ARIES™ is available to **hosted** clients in the US data center.

Version 6.3.3 to 7.2 as a static window on the menu bar

Version 8.0 and above as a pop out window



InvoicelQ 3.0 / 4.0

See the full picture from day one — InvoicelQ now quickly incorporates your historic data, giving legal ops smarter insights and faster ROI the moment you go live.

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Historic Invoice Categorization

InvoiceIQ Create Historic Batches

Set the Go-Live Date

Choose the Go Live date for InvoiceIQ. This is the day when InvoiceIQ categorization becomes a part of your organization's active workflow.

Note: Once you set the date, it can only be changed with assistance from support.

Go Live Date

10/31/2025 

[Set Go-Live Date](#)

InvoiceIQ Create Historic Batches

 **Notification:** Go-Live date has been updated successfully.

Select Date Range for Batch Creation

Note: Only standard or shadow invoices that are posted will be sent for categorization.

Start Date For Categorization

10/31/2024



End Date For Categorization

10/31/2025 

[Get Batch Info](#)

InvoiceIQ will allow you to set categorize invoices from the previous year or year to date.

Line Item Flagging

The screenshot shows the InvoiceIQ software interface. At the top, there is a navigation bar with buttons for Edit, Delete, Share, Printable View, Help, and Add Bookmark. Below the navigation bar is a table displaying a list of invoices. One specific line item in the table is highlighted with a yellow background. A modal dialog box is overlaid on the table, titled "Flag Line Item". The dialog contains the following text: "Select correct category and confirm to flag." Below this, it shows the "Original Category: Meals" and a dropdown menu labeled "Corrected Category" which is set to "Travel". At the bottom of the dialog are two buttons: "Confirm" and "Cancel". A blue arrow points from the "Flag Line Item" button in the bottom-left corner of the main interface towards the "Corrected Category" dropdown in the dialog box.

Invoice	Line #	Type	Description	Category	Model Recom...
C1775623_ALQW	1	Expense	Copying (11 pages)	Copying	High
C1775623_FZoa1	1	Fee	Checking filing receipts and sending to client.	Manage Data/ File	None
C1775623_FZoa	1	Expense	Copying (11 pages)	Copying	High
C1775623_BCEa1	1	Fee	Checking filing	Manage Data/ File	None
C1775623_BCEa	1	Expense	Copying (11 p	Copying	High
Test_RFEp	1	Expense	Having meals	Meals	High
Test_rzNJ	2	Expense	Having meals	Meals	High
Test_rzNJ	1	Fee	Sending a rem	Lock Billing	Medium
Test_ZpmQ	1	Expense	Sending a rem	Records Retrieval	Low
Test_utDY	1	Fee	Sending a rem	Lock Billing	Medium
Test_utDY	2	Expense	Having meals	Meals	High
Copy of Copy of 5	1	Expense	TEST	Travel	Medium
Test_NFkd	1	Expense	Having meals	Meals	High
Test_sGBZ	1	Expense	Having meals at a restaur	Meals	High

Recategorized line items are sent to the training database to be reviewed.



Outlook Add-in 5.0 on Web & Mobile

Do more right from your inbox, and now on the go!

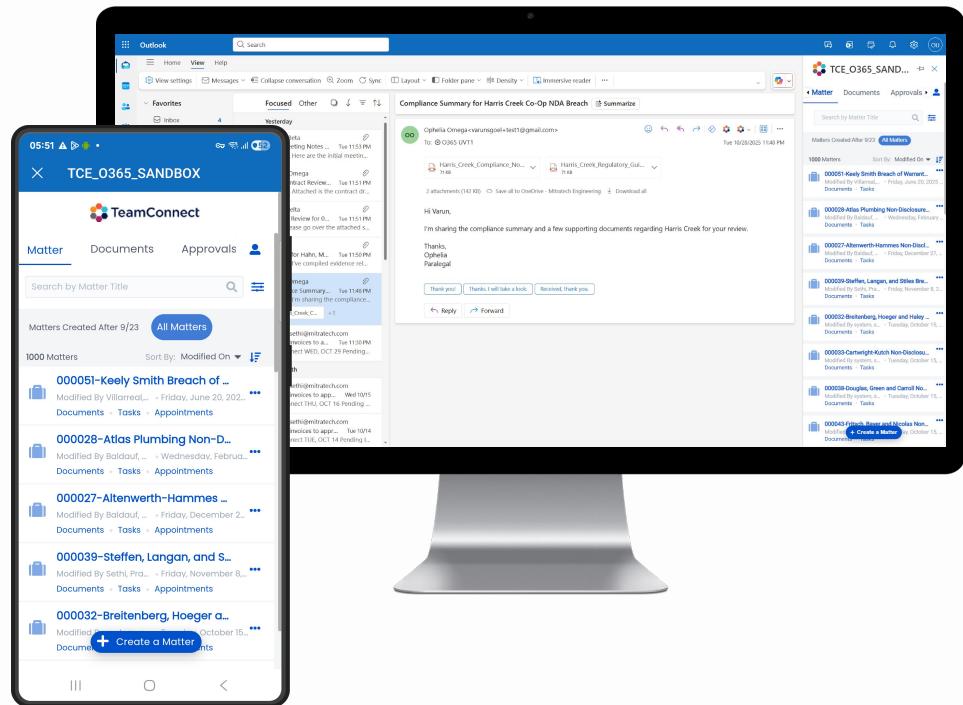
The TeamConnect Outlook Add-in works on both web & mobile, with a new Quick Invoice Approval feature to keep workflows moving wherever you are.

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Outlook Add-in 5.0 on Web & Mobile

Key Add-in Functionalities, Now Available on Mobile

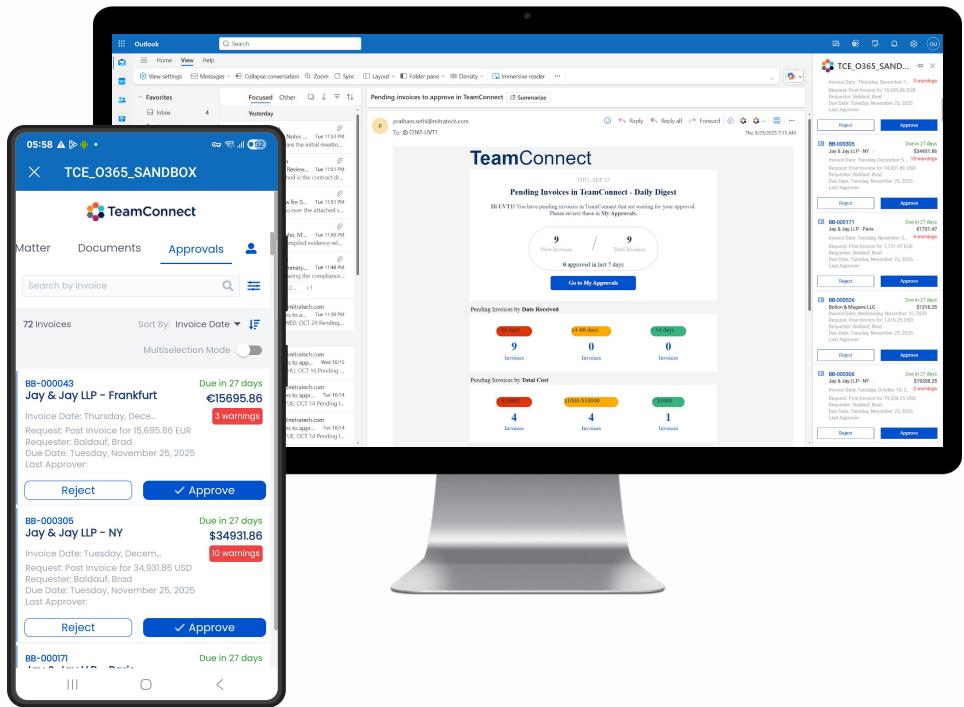
- Create & search matters
- Upload Emails & Attachments To Matters On the Go
- Manage Appointments and Leverage Two-way Sync with TeamConnect
- Manage & Complete Tasks, Including Integration with Microsoft To Do



Outlook Add-in 5.0 on Web & Mobile

Quick Invoice Approval on Both Web & Mobile

- View pending invoices right from your inbox and on the go
- Approve or reject invoices with a click
- View configurable details for an invoice
- Bulk approve or reject invoices
- Filter, search, and sort invoices



Outlook Add-in 5.0 on Web & Mobile

Demo



Outlook Add-in 5.0 on Web & Mobile



What versions of TeamConnect support the Outlook Add-in 5.0?

The Outlook Add-in v5.0 is supported with TeamConnect v8 onwards.



Is there a separate deployment required for mobile access?

Mobile is included with the standard Outlook Add-in deployment.



Which mobile operating systems are supported?

The Outlook Add-in works on both iOS and Android devices.



Can mobile access be disabled by the admin?

Yes, admins can disable mobile access through the Admin settings.



Can I control what invoice details are shown in the add-in?

Yes, the invoice fields can be configured within TeamConnect.



Is there a way to troubleshoot mobile issues?

Yes, users can generate and access logs for mobile activity.

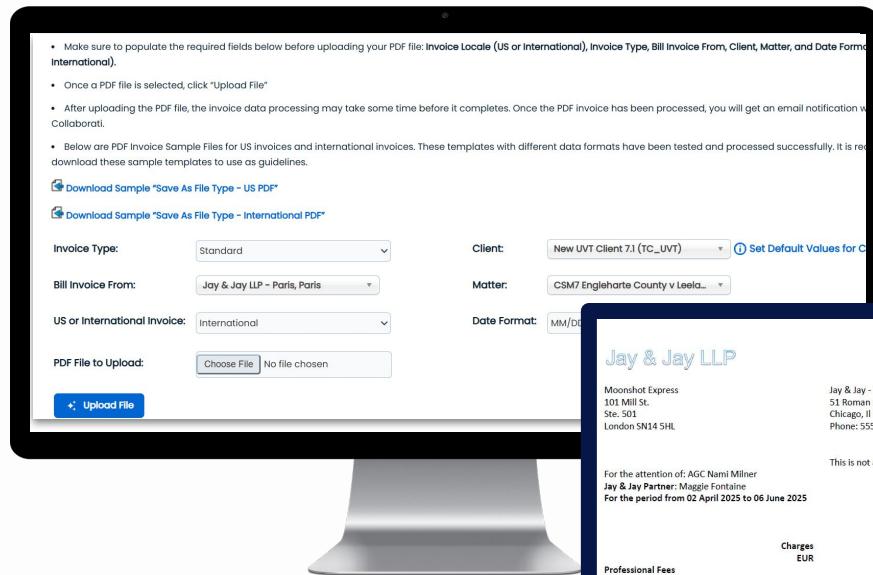
ARIES™ Non-LEDES Invoice Capture: International Invoices

Move toward 100% eBilling capture — bringing all invoices into view across currencies to unlock better insights, stronger compliance, and smarter spend decisions.

ARIES™ Non-LEDES Invoices – International

Firms can upload PDFs in any currency

- Upload invoices with **international taxes – VAT, GST, WHT**, and others
- Summary** level **taxes on Fees and Expenses**



Target Release: Nov. 22nd

Non-LEDES International – FAQs

- **Do clients need to upgrade TeamConnect to get this feature?**
 - No Teamconnect upgrade is required, This is a Collaborati feature, which will be available to all Collaborati Firms/Vendors upon release.
- **Are all invoice currencies supported?**
 - Yes, all currencies authorized by the associated TeamConnect clients are supported.
- **Are international taxes (VAT or others) supported?**
 - Yes Non-US Tax Codes for Fees and Expenses are supported. They must be authorized by the associated TeamConnect client
 - Only summary level taxes are supported currently, not line item taxes
- **Will it translate PDF invoices in different languages?**
 - ASCII-character languages are supported but not translated.

CSM 8 – Tax Authority eBilling Processes

Cross-border compliance – built-in tax authority fields and functionality help you meet jurisdictional eBilling mandates while keeping approvals and reporting streamlined.

TeamConnect Invoice - Tax Authority Fields

Invoice - CY Italy 02

 Create a Copy

Tax Authority 

Tax Authority
Invoice:

Yes

Pro-Forma Invoice: No

Hold for Tax
Authority
Approval:

No

- Flag **Tax Authority invoices** for easier tracking and reporting.
- **Ensure compliance** with the flexibility to adapt approval workflows and validations per jurisdiction
- Leverage Collaborati for **Pro-Forma** invoicing

Tax Jurisdiction:

Alternative Invoice
ID:

SDI-337889

Tax Locality:

Tax Authority
Invoice Date:

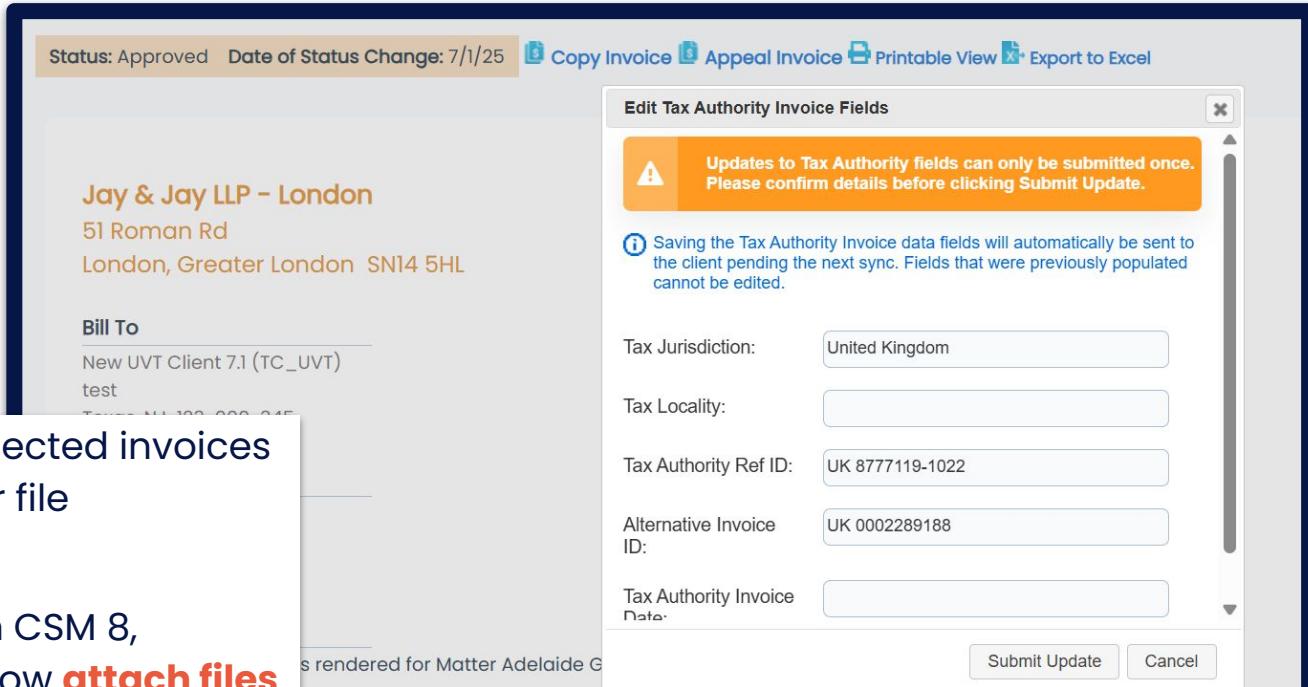
10/2/25

Tax Authority Ref.
ID:

01102025-234405

Collaborati Invoice - Tax Authority Fields

- **Fewer resubmissions** on rejected invoices due to missing tax details or file attachments
- For TeamConnect clients on CSM 8, Collaborati firm users can now **attach files** and **update Tax Authority fields** on **pending invoices** in TeamConnect



Tax Authority eBilling Processes – FAQs

- **Is a TeamConnect 8 upgrade required?**
 - Yes, CSM 8 is supported on TeamConnect 8, so clients on earlier versions would need to upgrade.
- **How will I know if a Firm uploads a new attachment on a pending invoice?**
 - An email notification will be sent automatically. The recipients of the email can be configured in the setup rule.
- **Can I add specific workflow and validation rules based on our business requirements in each country we bill from?**
 - Yes, the new Tax Authority release provides fields and functionality seen in many different country-specific eBilling requirements.
 - After upgrading, configuration is needed for approval workflows, searches/reports, validations or other rules specific to your requirements
- **Is there a direct integration with government tax portals?**
 - No, pre-built integrations with a specific country's eBilling portal aren't part of the TeamConnect CSM 8 release.

Security Framework Updates

Peace of mind by design – TeamConnect's upgraded security and platform foundation ensure long-term compliance, stability, and protection against emerging risks.

Security Framework Updates

Spring Security Framework v6.0

Updated Spring Security Framework + other third party Libraries to the latest Long-Term Support versions to **fortify security & risk-prevention protocols**.



JDK 21 Long-Term Support

- **TeamConnect Enterprise 8.0 is now updated to JDK21** which is a Long Term Supported version and also covered by [Oracle's NFTC](#).
- The update to JDK 21 with Industry compliance standards

Improved SAML SSO

SAML Authentication Settings

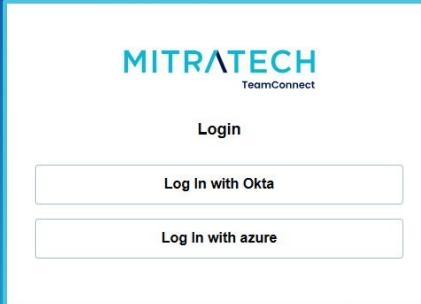
Enable SAML?

Add New SAML Registration

* Name <input type="text"/>	Description <input type="text"/>
* Registration ID <input type="text"/>	* Metadata URL <input type="text"/>
Entity ID <input type="text"/>	NameID Format <input type="text"/>
Single Logout URL <input type="text"/>	Single Logout Response URL <input type="text"/>
* Certificate <input type="file"/> No file chosen	Private Key <input type="file"/> No file chosen

SAML Registrations

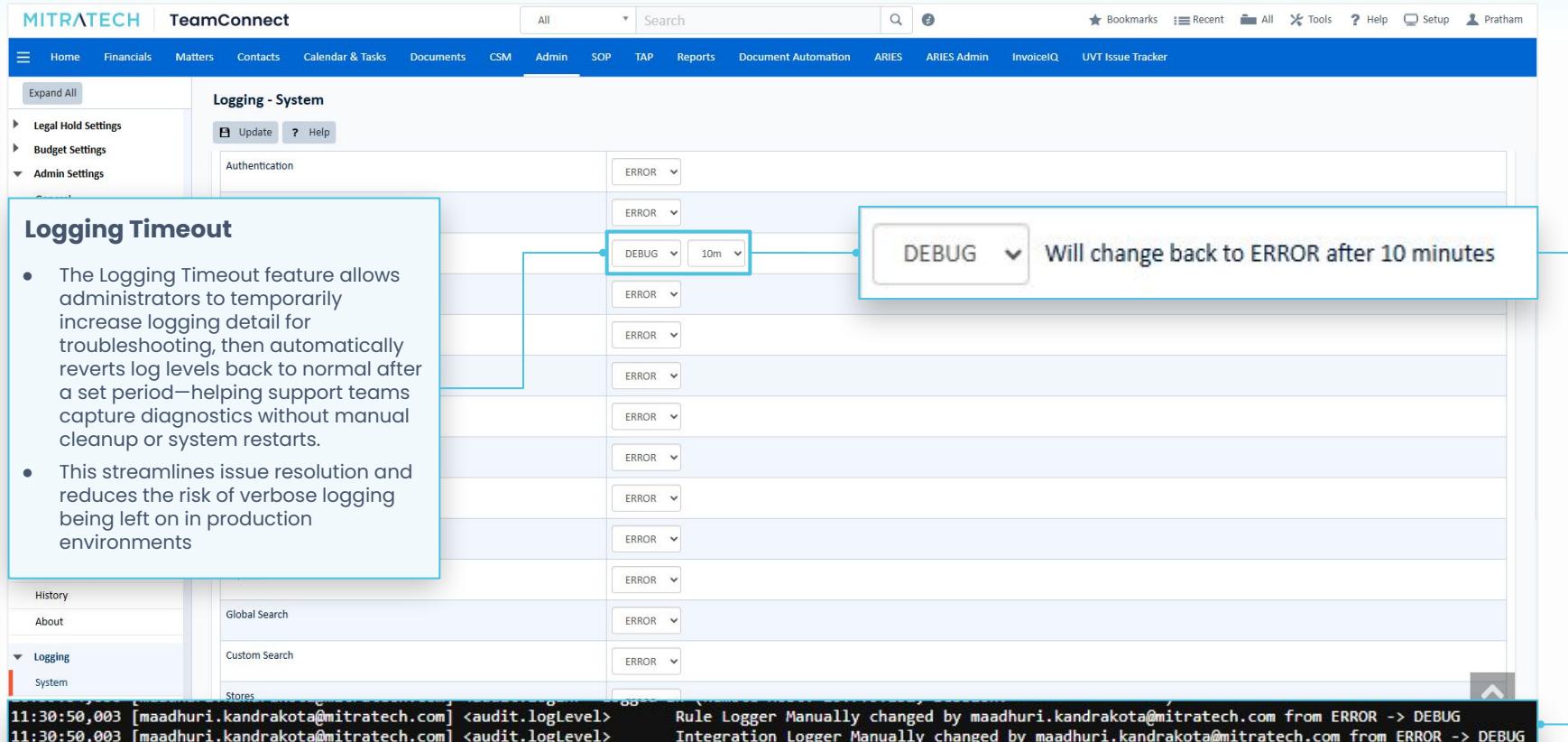
Name	Description	Registration ID	Metadata URL	Entity ID	Name Format	Single Logout URL	Single Logout Response URL	Actions
Okta	Login with Okta (Check with Platform administrator)	okta	https://integrator.3528844.okta.com/app/whitelabel/C249e897/sso/saml/metadata	http://www.okta.com/velocity/C249e897/metadata	urn:oid:names:SAML,1.1:nameFormat	null	null	Delete
azure	Login with Azure (Check with Platform administrator)	azure	https://login.microsoftonline.com/088d330-4812-4986-858c7f349549b7/metadata	https://www.azureservicebus.net/088d330-4812-4986-858c7f349549b7/metadata	urn:oid:names:SAML,1.1:nameFormat	null	null	Delete



SAML SSO included in TeamConnect

- TeamConnect Enterprise 8.0 will now have SAML-SSO integrated into the platform.
- TeamConnect 8.0 SAML authentication now also supports multiple identity providers for login.

Logging Improvements



Logging Timeout

- The Logging Timeout feature allows administrators to temporarily increase logging detail for troubleshooting, then automatically reverts log levels back to normal after a set period—helping support teams capture diagnostics without manual cleanup or system restarts.
- This streamlines issue resolution and reduces the risk of verbose logging being left on in production environments

Will change back to ERROR after 10 minutes

```
11:30:50,003 [maadhuri.kandrakota@mitratech.com] <audit.logLevel> Rule Logger Manually changed by maadhuri.kandrakota@mitratech.com from ERROR -> DEBUG
11:30:50,003 [maadhuri.kandrakota@mitratech.com] <audit.logLevel> Integration Logger Manually changed by maadhuri.kandrakota@mitratech.com from ERROR -> DEBUG
```

Resources

TeamConnect Version 8 Release Page
on Client Success Center

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Coming Soon

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February 2026

TeamConnect Business Intelligence (TCBI) for Linux



A modernization of TeamConnect Business Intelligence to a Linux-based Sisense platform, delivering faster, more secure, and fully compatible reporting along with many client-requested feature enhancements

Advanced Docket Management



An AI-enhanced docketing capability that automatically extracts, interprets, and tracks critical deadlines from case documents—reducing manual entry and improving litigation accuracy

Outlook 365 Document and Email Handling



Helps legal teams manage matter-related content directly within Outlook, minimizing the need to switch between systems. Includes file preview, multiple attachments, and multi-email uploads

ARIES™ - Expanded Financials



The next phase of the ARIES™ ecosystem, extending its AI insights beyond invoices to encompass all TeamConnect financial data—budgets, cost centers, and spend analytics—to power contextual, data-driven recommendations and actions

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TeamConnect Portal Sneak Peek

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TeamConnect Portal

December 9th

Improved visibility of idea alignment with our roadmap.

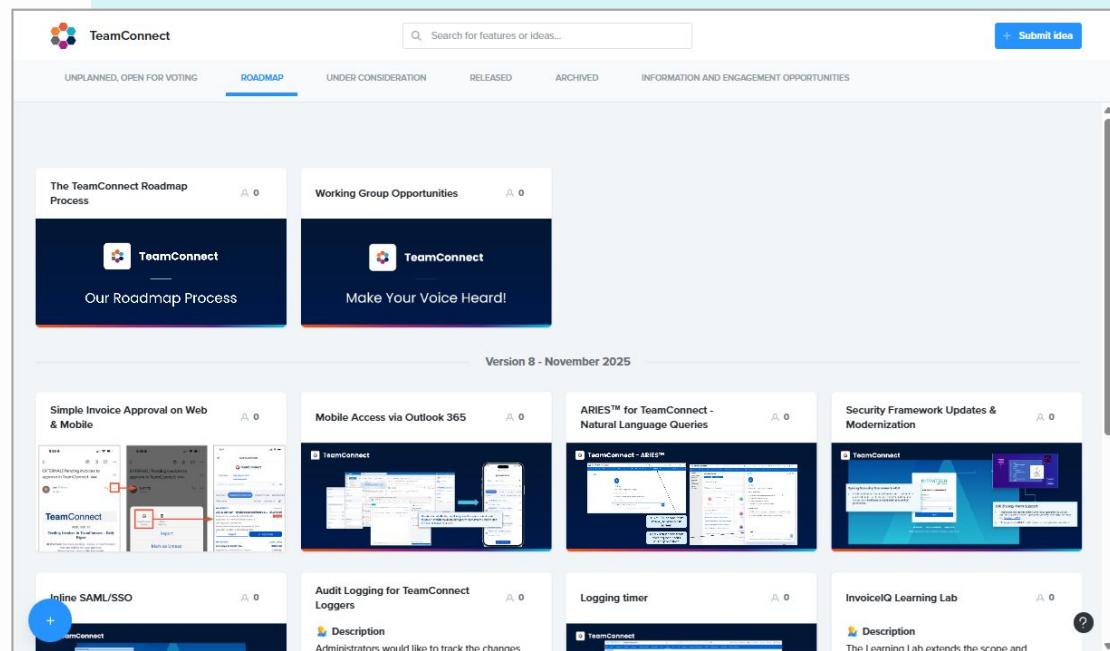
Simpler submissions and a clean, intuitive interface.

Smarter feedback loops: track idea merging and progress.

Increased transparency: view planned, in-progress, and released items.

Simpler Access & Single Sign-On: Use existing TeamConnect Community credentials.

More Curated Experience: Rather than standalone ideas, Productboard organizes related feedback into shared idea cards for comment, prioritization, and importance, clarifying collective needs.



The screenshot shows the TeamConnect Productboard interface. At the top, there is a navigation bar with tabs: UNPLANNED, OPEN FOR VOTING, ROADMAP (which is selected), UNDER CONSIDERATION, RELEASED, ARCHIVED, and INFORMATION AND ENGAGEMENT OPPORTUNITIES. A search bar and a 'Submit idea' button are also at the top. Below the navigation, there are two main sections: 'The TeamConnect Roadmap Process' and 'Working Group Opportunities'. Each section has a 'TeamConnect' logo and a call-to-action button. The 'Roadmap' section has a sub-section titled 'Our Roadmap Process' with a 'TeamConnect' logo and a 'Make Your Voice Heard!' button. Below these sections, a banner indicates 'Version 8 - November 2025'. The main content area displays a grid of idea cards. The cards include: 'Simple Invoice Approval on Web & Mobile' (with a screenshot of a mobile and web interface), 'Mobile Access via Outlook 365' (with a screenshot of a mobile and web interface), 'ARIES™ for TeamConnect - Natural Language Queries' (with a screenshot of a desktop interface), 'Security Framework Updates & Modernization' (with a screenshot of a desktop interface), 'Inline SAML/SSO' (with a screenshot of a mobile and web interface), 'Audit Logging for TeamConnect Loggers' (with a screenshot of a desktop interface), 'Logging timer' (with a screenshot of a desktop interface), and 'InvoiceIQ Learning Lab' (with a screenshot of a desktop interface). A blue circular button with a '+' sign is located in the bottom left corner of the idea cards area.

Post Webinar Survey

Q&A

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Thank You!

For information on upgrading, reach out
to your Strategic Account Manager

