Release Notes   Document ID: csm_60_rn_1

1   System Requirements

To install CSM 6.0 you must be running TeamConnect 6.0

Use the **Available Updates** section of the **About** page to install. For more information about how to install, refer to the Upgrade Considerations and Notes below.

Important: *Do not customize the object definitions that comprise CSM (CSM Settings, Timekeeper, Vendor, Budget Request, and Rate Request) in any way. Customized versions of CSM are not eligible for support.*

2   Upgrade Considerations and Notes

This section provides upgrade requirements and considerations for CSM 6.0. Details about the compatibility requirements for CSM and TeamConnect, and the related upgrade procedures, are available in the *TeamConnect 6.0 Installation Help* for your respective update.

CSM 6.0 has the following upgrade requirements:

- **Users must upgrade from CSM version 5.0.3**

- If you are using the Oracle 10g JDBC driver, you must include the following setting in the JVM argument on the server on which TeamConnect is deployed:

    -Doracle.jdbc.V8Compatible=true

- All tender requests and related records must be manually deleted.

When all requirements are met, perform the upgrade from the **Available Updates** block on the **About** page in TeamConnect.

Upgrading from CSM 4.0 Update 3
After running the update as usual, proceed through the following steps:

1. Log in as an administrator.
2. Open **Setup**.
3. Navigate to the **Tender Request** object.
4. Ensure that the Parent Object field is set to **CSM Settings**.
5. Ensure that the object is **Contact-centric** with a role of **Contact**.
6. Re-run the Module Setup Tool for the Tender Request installer.
   Important: *Tender requests created in CSM 4.0 Update 1, CSM 4.0 Update 2 and CSM 4.0 Update 3 must be removed upon upgrading to CSM 4.0.8 or later. Please contact Mitratech*

Professional Services (professionalservices@mitratech.com) for further information if you intend to utilize the tendering functions of CSM.

3　　Enhancements

The following enhancements have been added in CSM 6.0. Each enhancement is documented in the following format:

- A description of the enhancement
- Internal tracking code
- Additional information, if applicable

Enhancement: When timekeepers are synced from Collaborati to CSM, a validation takes place to prevent duplicate contact cards from being created. If a contact card exists, it will merge the information automatically

Tracking code: TC-13510

Additional Information: N/A

Enhancement: Billing analysts can now use alternative fee arrangements (AFA) for setting up a fixed or flat fee on a matter so that the total of invoices for that matter would be equal or lesser than this fixed amount.

Tracking code: TC-13512, TC-13513

Additional Information: Audit rules have now been applied to matters to help track the history of AFAs. This AFA allows for greater cost predictability and billing efficiency between legal departments and the various outside counsel firms working on that matter. For further details, visit the AFA page in the user guides.

Enhancement: CSM now supports tracking rates by timekeeper at the matter level

Tracking code: TC-13511

Additional Information: When timekeeper rates are validated, they will first look for a matter-level TK rate. If matter level rates do not exist, then the validation will default to the existing hierarchy. This allows for more flexibility in billing arrangements.

Enhancement: While manually importing timekeepers, users will be able to bulk-select any/all timekeepers that do not have a matching contact card in TeamConnect, and have the system auto-generate contact cards for them.

Tracking code: TC-13510

Additional Information: N/A

Enhancement: Timekeeper classifications are now compliant with 2014 LEDES.org updates, so firms and clients can track rates at a more granular classification level.

Tracking code: TC-16375

Additional Information: N/A

Enhancement: The CSM sync process now has additional structure to reduce errors and configure new firms faster

Tracking code: TC-13509

Additional Information: An automatic restart option is now available for the sync, and notifications now appear in the program if the sync has been turned off. Learn more about the enhanced features on the CSM Synchronization Page

Enhancement: Alternative Fee Arrangements can now be enabled on matters through an Out of the Box solution

Tracking code: TC-15227

Additional Information: To install Alternative Fee Arrangements on a matter, they must first be enabled in Collaborati**.** From there, a TeamConnect admin must run the AFA installer in the module setup tool. Installation instructions are available online through the AFA page

4   Known Issues

The following issues have been resolved in CSM 4.0.9. Each resolved issue is documented in the following format:

- A description of the issue
- A workaround, if possible
- Internal tracking code

Issue: Certain Custom fields are not inserted into the module after upgrading from a fresh install of CSM version 5.0.3

Tracking code: TC-20219

Workaround: You can insert these fields manually to the CSM settings object in setup

1. Log in as an administrator.
2. Open **Setup**.

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3. Select **Object Definition** in the "Go to…" drop-down field.
4. Navigate to **CSM Settings** object.
5. Add the 9 following custom fields (per screenshot below).

Custom fields featured below