Release Notes

Document ID: csm_63_u_1

1 System Requirements

To install CSM 6.3 you must be running TeamConnect 6.2.1 or later

After all requirements are met, perform the upgrade from the **Available Updates** block on the **About** page in TeamConnect. 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, Office, Firm, Tender Request, Budget Request, and Rate Request) in any way. Customized versions of CSM are not eligible for support.*

2 Installation

You must have admin rights to install this product.

To install TeamConnect Collaborati Spend Management 6.3.0

1. In TeamConnect, click the **Admin** tab, and then click the **Admin Settings** sub-tab link.
2. In the left pane, click the **About** link.
3. In the *Available Updates* section, click **Show Updates Available for Installed Products**.
4. Locate TeamConnect Collaborati Spend Management 6.3.0
5. Click **Install Now**.
6. If the installation is successful, restart TeamConnect.

Note: *If the installation is not successful, TeamConnect Collaborati Spend Management 6.3.0 does not appear as an Installed Product.*

3 Upgrade Considerations and Notes

This section provides upgrade requirements and considerations for CSM 6.3.0. Details about the compatibility requirements for CSM and TeamConnect, and the related upgrade procedures, are available in the [*TeamConnect 6.3 Installation Help*]() for your respective update.

CSM 6.2.4 has the following upgrade requirements:

- **Users must upgrade from CSM version 6.2.5**

- 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

4 Enhancements

Enhancement: Timekeeper Settings - change text to include "approve" language for auto contact creation
Additional Information: The new text will read "Automatically authorize Collaborati Timekeepers and create new contact records with Collaborati Timekeeper information."
Tracking Code: COLL-13867

Enhancement: Update CSM with new setting for tax rate and calculations to use the number from the LEDES File (up to 10 decimal places)
Tracking Code: COLL-11046

Historical Exchange Rates

Historical Exchange Rates Tool provides the functionality of uploading the currency exchange rates for the past and upcoming years. The currency exchange rates summary grid provides the detailed view of available exchanges rates like Year/Month/Day, Currency Name, Currency Code, Currency Exchange Rate, Last Updated On.

CSC Articles: *Historical Exchange Rates*

Enhancement: The Historical Exchange Rate record type has been added to CSM.
Additional Information: This new record can be viewed at *CSM Settings > Historical Exchange Rates*
Tracking Code: COLL-12760

Enhancement: A child record has been created under Historical Exchange Rate to store historical currency and exchange rate data.
Additional Information: Added fields are Year, Month, Currency Code, Currency Name, and Exchange Rate.
Tracking Code: COLL-12763

Enhancement: Exchange rates can be viewed and updated under the CSM Exchange Rates object.
Additional Information: The default view lists all years for which exchange rate data has been entered, which can be expanded into month-by-month details. If no exchange rates have been configured for the Client, only the System Currency field will be displayed. Users must have the appropriate permissions to access CSM Exchange Rates.
Tracking Code: COLL-12781

Enhancement: Users in the CSM Administrator and Manager security groups have view, edit, and create permissions on the new Exchange Rates object.
Tracking Code: COLL-12784

Enhancement: There is a new portal pane visible on the CSM Home Page and CSM Management Home Page called "CSM Management". Under that portal pane are the options "CSM Settings", "Billing Profile" and "CSM Historical Exchange Rates".
Tracking Code: COLL-13221

Enhancement: Added effective date fields to the DB for CSM Exchange Rates. Date fields include Effective Date From and Effective Date To and categories include Daily and Monthly.
Tracking Code: COLL-13994

Enhancement: Under the CSM Exchange Rates object view, added new tabs for Settings and History.
Tracking Code: COLL-14031

Enhancement: Add file upload to the UI under Historical Exchange Rates > General to create or update Historical Exchange Rates.
Tracking Code: COLL-11616

Enhancement: When uploading exchange rates, a user will see a link to Download Sample File. When the user clicks on the Download Sample File link, they will be prompted to download a file locally. The CSV file will provide instructions and examples for uploading historical exchange rates. There are sample files for both Daily and Monthly exchange rate options.
Tracking Code: COLL-11618

Enhancement: New CSM Exchange Rate setting to track rates on a Monthly or Daily basis.
Additional Information: The setting can be edited by a user with edit rights on the "Settings" tab of CSM Exchange Rates. It is READ ONLY on the General Tab. This setting field will be used in the code to either show Monthly or Daily rates in the UI; it will also apply to validations on upload file; and it may be used as an indicator by other areas in TeamConnect.
Tracking Code: COLL-13990

Enhancement: Upload a CSV file to create or update exchange rates
Additional Information: There is a template for Daily exchange rates which includes Date, Currency Code and Exchange Rate. There is also a template for Monthly exchange rates which includes Year, Month, Currency Code and Exchange Rate. All columns in either CSV are required.
Tracking Code: COLL-14079

Enhancement: Office Specific Timekeeper Contacts table has two new columns: City (of the Firm Office) and Country (of the Firm Office)
Tracking Code: COLL-13996

Enhancement: CSM Admins can change the view to Monthly or Daily for Historical Exchange Rates under Object View Tab > Settings.
Tracking Code: COLL-13992

Enhancement: When uploading a file with Historical Exchange Rates, the user can view a sample of the values being uploaded to confirm before changes are made.
Tracking Code: COLL-11617

Enhancement: When a file is uploaded to create or update Historical Exchange Rates, Collaborati should notify the user that there are some matching records in the system that will be overwritten. The user will have to confirm the upload before those changes are made.
Tracking Code: COLL-13998

Enhancement: When a user uploads a Historical Exchange Rate file with errors, there should be a temporary link to a CSV file with all of the rows that have errors made available for download through the UI.
Additional Information: Other users cannot access this file and if the user logs out and logs back in later or navigates to another page and comes back, the file will no longer be available.
Tracking Code: COLL-13999

Enhancement: When a user uploads a Historical Exchange Rate file and there are errors, a modal will pop up to notify the user of the errors found in the file and give the user the option to "Cancel" or "Confirm Upload".
Additional Information: The modal will show # Errors of # Rows; Error Message(s) (including Missing or Invalid Year, Missing or Invalid Month, Missing or Invalid Currency Code, Missing or Invalid Exchange Rate and Duplicate Entry - Same Data Already Exists in the File); it will show the row or rows where the data is correct; give the user the option to "Cancel" or "Confirm Upload" and the option to Download Error File.
Tracking Code: COLL-11619

Enhancement: Capture an audit history for CSM exchange rate updates including updates from null to any value, any value to any value or any value to null value.
Additional Information: This audit history can be viewed by clicking on the "History" tab under CSM Historical Exchange Rates.
Tracking Code: COLL-14004

Enhancement: Add filters "Effective From" and "Effective To" date fields to the Historical Exchange Rates page.
Tracking Code: COLL-12786

Enhancement: Run in background - audit history for CSM Exchange Rate updates
Additional Information: When a user uploads the Exchange Rates in TeamConnect then a warning message will be displayed on the screen and the same warning message will be displayed for other users as well who are accessing the general page of Historical Exchange Rates.
Tracking Code: COLL-14745

Billing Profile Updates - TK Home Office Rate Validation

New OOTB fee validations added to the Billing Profiles in the TeamConnect User Interface. Billing admins can now configure this validation rules to automate the invoice validation as per the selection based on these new Timekeeper Home Office Rate Validations.

Enhancement: Billing Administrators may now configure automatic warning messages on the line items or rejection messages on invoice in response to invoice submissions from clients based on the Approved Home Rate office rate for the line items.

- This fee validation rule can be configured under Billing Profiles > Fee Validations > FE102 - Fee charges exceed agreed rates > FE201 - Timekeeper Home Office rate validation
- This rule is applicable only if the “Home Office Rate Enabled” option is selected in the Firm/Firm Timekeeper’s profile.
- Auto-adjust the line item based on the below scenarios:
    - Invoice line item fee rates exceeding the approved timekeeper rate will be auto-adjusted to the approved rate only if the submitted invoice currency is the same as the currency for the timekeeper's approved rate.
    - If the invoice currency is different from the currency of the timekeeper's approved rate, then the line item will be adjusted to 0.

New Fee Validation Rule: FE201 - Timekeeper Home Office rate validation

Tracking Code: COLL-14524, COLL-15000, COLL-15010, COLL-11623, COLL-15403, COLL-15010

Validate Timekeeper Home Office and Home Office rate on each line item

Enhancement: Introduced new fee validation rule to help the Billing Administrators to configure the automatic warning messages on the line items or rejection messages on invoice in response to invoice submissions from clients based on the following:

1. Verify whether the timekeeper has Home Office
2. Verify whether the invoice currency is same as Home Office Rate currency
3. Then use the date on the line item and determine which rate on the Home Office is applicable.
4. Else, Options are provided to display either warning or rejection along with the reason.
5. Also, there is an option to Auto-adjust the Line Item to ‘0’ if the Timekeeper is missing Home Office or Timekeeper does not have an approved Home Office rate for the date of work submitted.

New Fee Validation Rules: FE201.1 - Timekeeper missing Home Office, FE201.2 - No active Home Office rate
Tracking Code: COLL - 14999, COLL-15008, COLL-15010

Enhancement: New fee validation rule to verify the invoice if the exchange rate is not available for the conversion of Invoice currency or the timekeeper home office rate. This rule is applicable when invoice currency and home office rate currency are different.
New Fee Validation Rule: FE201.3 - No exchange rate found
Tracking Code: COLL-15009, COLL-15010

Enhancement: New fee validation rule for invoices where the invoice currency is different than the TK Home Office Rate currency. This new rule verifies the invoice either on the allowed Warning threshold or Rejection threshold percentage after the exchange rate conversions.
New Fee Validation Rule: FE201.4 - Tolerance threshold Warning, FE201.5 - Tolerance threshold Rejection
Tracking Code: COLL-15006, COLL-15007, COLL-15010

5001 Plaza on the Lake, Suite 111, Austin, TX 78746

p: 512.382.7322 e: support@mitratech.com

www.mitratech.com

Enhancement: New fee validation rule to verify and reject the Invoices received from a Firm that has a blank value for the Firm's "Fiscal Year Start Date" field
New Fee Validation Rule: FE201.6 - Get exchange rates per firm fiscal year start date
Tracking Code: COLL-15187, COLL-15010

Enhancement: To verify the invoice based on the validation rules (like FE201.6 - Get exchange rates per firm fiscal year start date) set by the billing administrator and the historical exchange rates summary level on Monthly/Daily if the invoice currency is different from Timekeeper Home Office Rate currency.
Tracking Code: COLL-15005, COLL-15004,COLL-15003

Enhancement: New block named “Firm Timekeepers” is added on the invoice page to provide the list of all the Firm Timekeepers associated with the Invoice line items.
Tracking Code: COLL-14642

Enhancement: Hover Over search for Firm Timekeeper
Additional Information: Hover over the Firm timekeeper provides the following details:

Classification:
TK ID:
City*:* (of the TK)
Country (Code*): (of the TK)
Phone:
Email*:*
Home Office: (name)
Home Office Rate Enabled: (Y/N)
Firm: (name)

Tracking Code: COLL-14822

5 Resolved Issues

The following issues have been resolved in CSM 6.3.0. Each resolved issue is documented in the following format:

- A description of the issue
- Internal tracking code
- Salesforce case number

Issue: If a Timekeeper with an associated Firm Timekeeper record in CSM has values for the field "Permitted to Practice Year" or "Licensed to Practice Law In" and those values are edited, removed and set to NULL, the CSM/Collaborati sync will fail with a null pointer exception.
Additional Information: If these fields were set to NULL when created, there will not be any issues.
Tracking Code: COLL-13976 / SUPPORTPRI-57379

Issue: The automated timekeeper merge is updating the address type of the Default Timekeepers to NULL and this is causing syncs to break in Prod, Stage, and Test. This fix will set the address type for Default Timekeepers with a NULL default address type.
Tracking Code: COLL-14593

Issue: Matter creation notifications causing JDBC session closure
Additional Information: Sync started timing out in the matters section and there were "JDBC session closed" errors in the Collaborati log.
Tracking Code: COLL-15273

6 Known Issues

Issue: Error in displaying firm timekeepers block while creating a new invoice in TeamConnect
Description: The error message appears if the user does not have permission (or rights) to view the Firm Timekeeper records in CSM as well as rights to view Firm, Office, and Office Timekeeper records.
Workaround:
The user needs to be added to a group with rights to view the Firm Timekeeper records in CSM as well as rights to view Firm, Office, and Office Timekeeper records in CSM.
Tracking Code: COLL-15652

Historical Exchange Rate Known Issues

Issue: When a user changes the browser zoom level staying on the Historical Exchange Rate Page, the exchange rate table gets altered.

1. For example, when zooming out from 100% to 80%, an extra empty column is shown.
2. For example, when zooming in from 100% to 125%, the last column is cut off.

However, after refreshing the page or expand any rates, the table will appear correctly in any zoom level.

Issue: Excel truncates decimal points to 9 digits when the cell type is "General". When creating a Historical Exchange Rates excel for upload, be sure a cell type is set to "Text" in order to input more than 9 decimal places. Workarounds include:

1. If a client wants to add more than 9 decimals for any exchange rate, first convert the cell to "Text" type and then add the additional decimals. NOTE: This will have to be done every time the Excel document is saved and closed.
2. Use CSV instead of Excel and there will not be a 9-decimal limit on numbers.

5001 Plaza on the Lake, Suite 111, Austin, TX 78746

p: 512.382.7322 e: support@mitratech.com

www.mitratech.com