

Release Notes

Document ID: csm_7_u_0

1 System Requirements

To install CSM 7.0 you must be running TeamConnect Enterprise 7.0.

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 7.0

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 7.0
5. Click **Install Now**.
6. If the installation is successful, restart TeamConnect.

Note: If the installation is not successful, TeamConnect Collaborati Spend Management 7.0 does not appear as an Installed Product.

3 Upgrade Considerations and Notes

This section provides upgrade requirements and considerations for CSM 7.0. Details about the compatibility requirements for CSM and TeamConnect, and the related upgrade procedures, are available in the [TeamConnect 7.0 Installation Help](#) for your respective update.

To upgrade to CSM 7.0.0, you must be on CSM 6.3.5 Patch 3 or CSM 6.2.6 Patch 2.

Release Notes

Document ID: csm_7_u_0

4 Enhancements

Enhancement: Add "Other Details" to Practice Area and Race fields

Description: A text field is displayed as Practice Area (Other) and Race (Other) when the user selects the "Other" option for the Practice Area and Race diversity fields. By default, these values are reportable. These values are displayed on the Timekeeper profile, Firm Timekeeper profile, and also while authorizing the new Timekeeper.

Tracking Code: COLL-17390

Enhancement: New tab on Billing profile

Description: New tab named 'Timekeeper Validation' is added on the billing profiles page and includes a validation rule TK-101 - Flag Timekeeper as Diverse. By default, this rule is inactive and gets activated only if the client marks as Yes for any one of the one diversity fields. Based on the client selection, timekeeper will be flagged as diverse for the fields selected.

For more information, refer to the [Link](#).

Tracking Code: COLL-18657

Improvement: CSM- Unauthorize Timekeeper when Record is Deleted in CSM

Description: when the Timekeeper record for an authorized timekeeper is deleted in CSM, the timekeeper status returns to unauthorized instead of pending authorization by default.

Tracking Code: COLL-17035

Enhancement: New fields under the Rate Request General Information section

Description: New fields named "Previous Rate Request and Reason for Resubmission" are newly added which provides a hyperlink to previously rejected or partially approved Rate Request and also the reason for resubmission provided by firms. These fields appear only when a Firm tries to resubmit the rejected rate request or any rejected line item.

Tracking Code: COLL-16510, COLL-19451

Improvement: Rate Request - Messaging for an existing rate when approving a new rate with conflicting date ranges

Description: A warning message "Proposed rates overlap date ranges of existing timekeeper rates, and approving the new rate request will update existing rates accordingly" is displayed when there is an overlap of date ranges between the proposed date and existing date range of the rate.

Tracking Code: COLL-16165

Improvement: UI Improvements - Rate Request Page

Description:

Following are the UI changes on the Rate Request page:

- Update the Rate Items block to display the "Assignee and Matter Details" under the Rate Items.
- Renamed the Header Information block to Rate Request General Information.
- Renamed the Vendor Comments block to Firm Office Comments.
- Renamed Comments to Comments to Office/ Rejection Reason

Tracking Code: COLL-16473

Release Notes

Document ID: csm_7_u_0

Improvement: Show/Hide Firm Timekeeper General Information block on Rate Request Page

Description:

Firm Timekeeper General Information” block on the rate request to be hidden automatically if

- Rate is NOT submitted by TK+Rates, i.e. rates submitted alone for exiting authorized TK.
- Rates submitted for more than 1 TK.

Populate values for Assignee and Matter details submitted from Collaborati.

Populate values for:

- Requested by: Value to be populated from what is submitted in Collaborati (can be null if left blank)
- Created by: auto-populate who in Collaborati created the Rate Request

Tracking Code: COLL-16474

Enhancement: New custom rule to reject Timekeeper and Rate Request

Description:

To activate this rule, Rate collaboration and the CSM setting Rate Approval required for Timekeeper Authorization must be enabled.

Rule: If the user rejects the rate request where only one Timekeeper is associated with the rate request and the Timekeeper status is “Authorization Pending Rate Approval” then a warning message is displayed as “Rejecting rates will reject the associated Timekeeper”

Note:

If Reject Timekeeper on rejection of rates is marked as YES then:

- Rate request is rejected.
- Timekeeper is unauthorized.
- Associated Timekeeper Contact will be deleted.

If the associated Timekeeper is linked to other records in TeamConnect then a warning message is displayed after confirming the rejection of rate request as “Associated contact for this rejected timekeeper must be deleted manually as it is currently linked to other records in TeamConnect.”

Tracking Code: COLL-16476

Improvement: Rate Request Audit History when Rate and Timekeeper are Rejected

Description:

Display the details of the rejected Rate Request and rejected Timekeeper in the History tab.

A warning message as “The associated Timekeeper on this Rate Request was rejected, unmapped, and removed. Please see History for details.” is displayed on the rate request page to inform the user that the rejected rate request was associated with a rejected timekeeper that has been unmapped and deleted. **Tracking Code:** COLL-19663

Enhancement: New portal pane added to CSM home page named “Timekeeper Authorization Pending Rate Approval”

Description: This portal pane alerts the clients and provides visibility to facilitate Rate reviews and approvals as well as pending Firm actions. This portal pane is specific to the clients who configured the setting “Rate Approval required for Timekeeper Authorization.”

Tracking Code: COLL-16378, COLL-20035

Enhancement: New field added on Timekeeper and Firm Timekeeper profile.

Description: New field “isDiverse” is added on Timekeeper and firm timekeeper profile. By default, this field is reportable.

Tracking Code: COLL-18119

Release Notes

Document ID: csm_7_u_0

Improvement: Improve Rate Request Rejection workflow

Description: Renamed the Comments block to “Comments to Office/ Rejection Reason”. If the setting “Require Rejection Reason for Rejecting Collaborati Rate Requests” is enabled, then this field is mandatory and to be filled while rejecting a Rate Request.

Tracking Code: COLL-18074

Enhancement: Approve all Office Timekeepers on Approving a Rate for Home Office

Description: For clients that are using home office rates, when a rate for a timekeeper’s home office is approved, authorize all the office specific timekeepers that are currently in a “Pending Rate Approval” state.

Tracking Code: COLL-19461

Enhancement: Auto authorize Timekeeper(s) for all offices when authorization is pending rate approval and setting to authorize Timekeeper for all other offices is ON

Description: When the firm setting “Automatically authorize timekeepers for all other offices” is ON and a Timekeeper is in the status authorization pending rate approval, once the rate request is approved, the Timekeeper should get auto-authorized for all other offices which DO NOT have the setting require rates for Timekeeper authorization.

Tracking Code: COLL-20047

Enhancement: New tab named “[Timekeeper Settings](#)” is created under the Global CSM settings.

Description: Below are the new options added:

Timekeeper Authorization: This new setting provides the client an ability to authorize the timekeeper only if the timekeeper rates are approved. To apply this setting for all firms and offices, click the “Apply to All Firms and Offices” button.

If this setting is enabled then after approving the timekeeper in the Timekeeper Authorization Wizard, the timekeeper status will display as “Pending Rate Approval” instead of “Authorized” if timekeeper rates need to be approved.

Timekeeper Submission from Collaborati: This new setting provides the client an ability to receive the Timekeeper submissions from Collaborati with rates or without rates. If “Require Rate with Timekeeper Submission from Collaborati” is marked as YES then warning messages are displayed to the Firms/Offices if they try to submit the Timekeeper profiles without Rates. To apply this setting for all firms and offices, click the “Apply to All Firms and Offices” button.

Clients can also mark the timekeeper fields as mandatory while creating the new timekeepers in Collaborati by firms as needed.

Tracking Code: COLL-16514

Improvement: Show/Hide Firm Timekeeper General Information block on Rate Request Page

Description:

Firm Timekeeper General Information” block on the rate request to be hidden automatically if

- Rate is NOT submitted by TK+Rates, i.e. rates submitted alone for exiting authorized TK.
- Rates submitted for more than 1 TK.

Populate values for Assignee and Matter details submitted from Collaborati.

Populate values for:

- Requested by: Value to be populated from what is submitted in Collaborati (can be null if left blank)
- Created by: auto-populate who in Collaborati created the Rate Request

Release Notes

Document ID: csm_7_u_0

Tracking Code: COLL-16474**Enhancement:** New custom rule to reject Timekeeper and Rate Request**Description:**

To activate this rule, Rate collaboration and the CSM setting Rate Approval required for Timekeeper Authorization must be enabled.

Rule: If the user rejects the rate request where only one Timekeeper is associated with the rate request and the Timekeeper status is "Authorization Pending Rate Approval" then a warning message is displayed as "Rejecting rates will reject the associated Timekeeper"

Note:

If Reject Timekeeper on rejection of rates is marked as YES then:

- Rate request is rejected.
- Timekeeper is unauthorized.
- Associated Timekeeper Contact will be deleted.

If the associated Timekeeper is linked to other records in TeamConnect then a warning message is displayed after confirming the rejection of rate request as "Associated contact for this rejected timekeeper must be deleted manually as it is currently linked to other records in TeamConnect."

Tracking Code: COLL-16476**Improvement:** Rate Request Audit History when Rate and Timekeeper are Rejected**Description:**

Display the details of the rejected Rate Request and rejected Timekeeper in the History tab.

A warning message as "The associated Timekeeper on this Rate Request was rejected, unmapped, and removed. Please see History for details." is displayed on the rate request page to inform the user that the rejected rate request was associated with a rejected timekeeper that has been unmapped and deleted. **Tracking Code:** COLL-19663

Enhancement: New portal pane added to CSM home page named "Timekeeper Authorization Pending Rate Approval"

Description: This portal pane alerts the clients and provides visibility to facilitate Rate reviews and approvals as well as pending Firm actions. This portal pane is specific to the clients who configured the setting "Rate Approval required for Timekeeper Authorization."

Tracking Code: COLL-16378, COLL-20035**Enhancement:** New field added on Timekeeper and Firm Timekeeper profile.

Description: New field "isDiverse" is added on Timekeeper and firm timekeeper profile. By default, this field is reportable.

Tracking Code: COLL-18119**Enhancement:** Approve all Office Timekeepers on Approving a Rate for Home Office

Description: For clients that are using home office rates, when a rate for a timekeeper's home office is approved, authorize all the office specific timekeepers that are currently in a "Pending Rate Approval" state.

Tracking Code: COLL-19461

Release Notes

Document ID: csm_7_u_0

5 Known Issues

Issue: When there are AFAs already added and saved on the Matter. Then the user edits the matter, then removes the AFA, then the user turns OFF/Unchecks “Use Alternative Fee Arrangements (AFAs) for this matter”, and then saves the record, the AFA the user tried delete still exists.

Workaround: After deleting an AFA, the user must save the matter record BEFORE turning OFF/Unchecking “Use Alternative Fee Arrangements (AFAs) for this matter.”

Tracking Code: COLL-20649

Issue: 'isDiverse' Field on Firm Timekeeper profile is not getting updated correctly upon CSM sync after making changes to the existing client configuration in billing profile

Tracking Code: COLL-20884