MITRATECH

Collaborati Spend Management 6.3.5 Patch 5
Release Notes

Collaborati Spend Management® 6.3.5 Patch 5 (PCSM6350005) resolves the following issue:

Issue: Rate requests gets approved when Timekeeper currency in TeamConnect is different to Timekeeper currency in Collaborati
Tracking Code: SUPPORTPRI-65668
Case Number: 2022-0628-952321
Reported Version: TCE 6.3.3

Workaround
- Change the currency in TeamConnect.
- Ask the Vendor to resubmit the rate request and approve.

Pre-Requisites
- Client versions:

  TCE 633
  LMM - 501
  FMR- 631
  CSM -631

- Active Vendor
- Active Timekeepers
- Matters synced to Collaborati

- Also checked the same issue on below latest instances:

  TeamConnect Enterprise Version 6.3.6
  TeamConnect Legal Matter Management 5.0.1
  TeamConnect Financial Management 6.3.1
  TeamConnect Collaborati Spend Management (CSM) 6.3.5.

Steps to Reproduce

1. Need to have an active office and active authorized timekeeper.
2. Submit a rate request in Collaborati.
3. Run the CSM sync.
4. Let the request reach TeamConnect.
5. Make the currency of the timekeeper in TeamConnect contact card different to the currency in Collaborati.
6. Approve the rate request and run the CSM sync.
7. Approved rate request shows 'Invalid Rate Item' and rate is not synced. Client/Vendor does not know why the rate is unavailable since the request shows approval.
   NO information on the logs.

Expected Results of Steps

Rate requests must not be allowed to approve or show an error that currency is different.

Invalid rate item on the current column is not specific.

Actual Results of Steps

Rate request gets approved in TeamConnect.
Vendors also can see the rate request is approved but not the rate. It shows unavailable.

Root Cause Analysis

Rate request approval phase is not changed to rejected or canceled when the rate request has currency mismatch. Added fix to handle this and TeamConnect will throw an exception when there is currency mismatch in the rate request items.

Issue: If a vendor/client association is removed in Collaborati after the vendor is authorized in CSM, CSM sync can break during Vendor Rate Sync
Tracking Code: SUPPORTPRI-66003
Case Number: 2022-1026-1000865
Reported Version: CSM 6.3.1

Workaround
Delete the vendor profile in CSM that was disassociated from the client account.

Pre-Requisites

AT&T CSM Version is CSM 6.3.1 Patch 2 & TCE is 6.3.3

Able to reproduce on CSM 6.3.7.

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-CSM must be connected to Collaborati.

-Rate Sharing must be enabled.

-There must be at least one vendor fully authorized and ready to submit invoices.

Steps to Reproduce

1. Log into Collaborati and create a new Test Firm/Office profile and associate it with the client account.
2. In CSM, authorize this Test Office.
3. Run the CSM sync.
4. In Collaborati, the status of this vendor should be 'Pending Office Setup'.
5. Stop the CSM sync.
6. Log in to Collaborati and disassociate the client/office profile.
7. Make sure that the CSM sync is still stopped.
8. Add a new Task Code by navigating to Setup > Go To...Object Definitions > Invoice > Line Item> Task Categories.
9. Run the CSM sync.
10. Sync should fail with an error.

Expected Results of Steps

CSM sync should not fail and should handle the error when syncing Vendor Rates

Actual Results of Steps

CSM sync breaks.

Root Cause Analysis

While updating vendor rates, null was passed as "rateList" when there is no vendor associated.

Issue: 0$ AFA time based invoices throw an error 'BigInteger divide by zero'.

Tracking Code: SUPPORTPRI-65100
Case Number: 2022-0627-951795
Reported Version: TCE 6.3.3

Workaround
NA

Pre-Requisites

- TCE 6.3.3
- TeamConnect Legal Matter Management 5.0.1
- TeamConnect Financial Management 6.3.1
- TeamConnect Collaborati Spend Management (CSM) 6.3.1
    - AFA Enabled
    - AFA Enabled Matter("Fixed Fee(Time Based)"
    - AFA specific rules under billing profile (List is attached)
    - AFA rules under setup (screenshots attached)
    - AFA Information block.

- The issue is replicated in 6.3.6, but there is no issue. Users needed a patch or workaround in 6.3.3 only and hence raising this defect.
- 6.3.6 environment details :
    - TeamConnect Enterprise Version 6.3.6
    - TeamConnect Legal Matter Management 5.0.1
    - TeamConnect Financial Management 6.3.1
    - TeamConnect Collaborati Spend Management (CSM) 6.3.5

Steps to Reproduce

1. Created Matter with a budget.
2. Add as an Involved Party on Matter.

3. Added "Fixed Fee(Time Based)" AFA type for that firm on Matter.
4. Submitted 0$ Invoice through Collaborati.
5. Ran the CSM sync in Team Connect.

Expected Results of Steps

0$ invoices must be submitted without any errors.

Actual Results of Steps

Error is displayed.

Root Cause Analysis

While adjusting the line items, the net total was being used as a divisor to divide a number and if the total is zero it would run into the error.

Issue: Invoices tied to AFA matters cannot be approved by users who do not have 'View Admin Settings records' rights.
Tracking Code: SUPPORTPRI-65180
Case Number: 2022-0513-929933
Reported Version: CSM 6.3.1, TCE 6.3.5

Workaround

Giving the user View Admin Settings records, resolves the issue.

Pre-Requisites

AFA's must be enabled.

Steps to Reproduce

Users are facing System Security Exception when trying to Approve Invoice where Matter has AFA Type Fixed Fee (Matter Based), Fixed Fee(Milestone Bases) or Fixed Fee (Time Based)

For. E.G BEGINSECURITYEXCEPTIONUser pl6305 does not have functional security right : System, ReadENDSECURITYEXCEPTION

1. Create an invoice tied to an AFA matter and push it in workflow.
2. The approvers should not have any 'Admin Rights' or 'Setup Rights'.
3. Post the invoice.
4. Error is displayed.
5. The logs indicate security exceptions.

Expected Results of Steps

A normal user without Admin/Setup rights should be able to approve invoices tied to AFA Matters.

Actual Results of Steps

A normal TeamConnect user without Admin/Setup rights is unable to approve invoices tied to AFA Matters.

Root Cause Analysis

Existing method depended on the admin rights to fetch system settings which is not needed therefore the error occurred. Replaced the method with a more appropriate one.

This fix will be merged into the CSM 7.1 Update.

Below fixes were merged in CSM 6.3.5 patch 1-4:

Issue: CSM upgrade failed due to old LegalHold module
Tracking Code: SUPPORTPRI-64912
Case Number: 2022-0713-958168
Reported Version: CSM 6.3.1

Issue: CSM - Time taking for invoice bulk final approval is longer than expected
Tracking Code: SUPPORTPRI-65058
Case Number: 2022-0617-948280
Reported Version: CSM 6.3.5

Issue: Connection failing with error - "Connection refused. Unrecognized CSM identifier."
Tracking Code: SUPPORTPRI-64491
Case Number: 2022-0428-923055
Reported Version: CSM 6.3.1

Issue: CSM sync fails when Contact Centric Objects are added on custom objects and are added to E-billing roles
Tracking Code: SUPPORTPRI-64475
Case Number: 2022-0516-930450
Reported Version: TCE 6.3.5

INSTALLATION

The following list is a summary of the procedures necessary to install this patch.

1. Log into TeamConnect® as an administrator.
2. Click the Admin tab.
3. Click Admin Settings under the tab bar if it is not already selected.
4. In the left pane, click the About link.
5. In the Available Updates section, follow the instructions below to install the patch.
      a. Click on the Show updates available for installed products button.
      b. Locate CSM 6.3.5 Patch 5.
      c. Click Install Now and follow the installation instructions.

6. After successfully installing this patch, stop and start your TeamConnect® instance.

UPGRADE CONSIDERATION

No significant upgrade considerations for this patch.

LEVEL OF RISK TO UPDATE WITH PATCH

LOW