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1 System Requirements

To install CSM 7.1 you must be running TeamConnect Enterprise 7.1.

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 7.1

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 7.1
5. Click **Install Now**.
6. If the installation is successful, restart TeamConnect.

Note: If the installation is not successful, TeamConnect Collaborati Spend Management 7.1 does not appear as an Installed Product.

3 Upgrade Considerations and Notes

This section provides upgrade requirements and considerations for CSM 7.1. Details about the compatibility requirements for CSM and TeamConnect, and the related upgrade procedures, are available in the *TeamConnect 7.1 Installation Help* for your respective update.

To upgrade to CSM 7.1, you must be on CSM 7.0 or CSM 7.0 Patch 1.

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4   Enhancement/Improvements

Enhancement: Add/Update new settings and Timekeeper Classifications for CSM Timekeeper Settings.
Description:
- New Timekeeper settings and Classifications have been updated/added for CSM settings.
- User Interface has been updated for the Timekeeper page with an action button labeled as **Enable Additional Timekeeper Classifications** with a description message in Timekeeper Settings Tab.

For more information refer to the link.
Tracking Codes: COLL-21861, COLL-21862, COLL-21863, COLL-21742, COLL-21744

Enhancement: Update Apply Settings in CSM for Timekeepers to a background action with banner notifications (CSM global level settings).
Description: On the CSM Timekeeper Settings page, the Background action and Banner Notifications have been added to **Apply to all firms and offices** button. If a user update any of the fields on the Timekeeper Settings page and clicks on **the Apply to all firms and offices** button, these updated banner notifications will display on the screen.
- When a user clicks on the Apply to All Firms and Offices button on the Default Rate settings page, the below message will be displayed on the screen:
  - *The updates to the Timekeeper settings are running in the background. Until this process is completes, you will be unable to apply new CSM Rate settings to Firms or Offices. You can return to this page or refresh the page to confirm this action has been completed.*
- When an update is completed, it will display below message:
  - *Timekeeper Settings Successfully Applied to Firms and Offices on <Date Time>"*

- If the update fails (or) is partially completed, it will display the below message:
  - *Previous Update to Timekeeper Settings were not Successfully Applied to all Firms and Offices on <date time>. Please try again.*

For more information, refer to the link.
Tracking Code: COLL-20680

Enhancement: Update Apply Settings in CSM Rates to a background action with banner notifications (CSM global level settings).
Description: On the CSM Rates page, the Background action and Banner Notifications have been added to **Apply to all firms and offices** button. If a user updates any of the fields on the CSM Rates page and clicks on **the Apply to all firms and offices** button, these updated banner notifications will display on the screen. The Banner notifications are given below:
- When a user clicks on **Apply to All Firms and Offices** button on the Default Rate settings page, the below message will be displayed on the screen:
  - *The updates to the Rate settings are running in the background. Until this process completes, you will be unable to apply new CSM Rate settings to Firms or Offices. You can return to this page or refresh the page to confirm this action has been completed.*

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- When an update is completed, it will be display the below message:
  - *Rate Settings Successfully Applied to Firms and Offices on <Date Time>"*
- If the update fails (or) is partially completed, it will display the below message:
  - *Previous Update to Rate Settings were not Successfully Applied to all Firms and Offices on <date time>. Please try again.*

For more information, refer to the link.
Tracking Code: COLL-21214

Enhancement: New CSM setting to disable Timekeeper DEI data in Collaborati from syncing to TeamConnect CSM.
Description: A new CSM setting named **Timekeeper DEI Data** has been added to Timekeeper Settings Tab under the CSM settings view to disable Timekeeper DEI data in Collaborati from syncing to TeamConnect CSM. This setting helps users stop syncing the Timekeeper DEI data from Collaborati to TeamConnect CSM. When these CSM Settings disable Timekeeper DEI data in Collaborati from syncing to teamconnect CSM, then CSM logs and Timekeeper Authorization logs will not reference Timekeeper DEI data.
Note: *The CSM Sync will take a while to complete sync from collaborati when users enable the Timekeeper DEI Data settings for large numbers of timekeepers.*
For more information refer to the link.
Tracking Code: COLL-21848, COLL-23091

Enhancement: New Office setting to disable Timekeeper DEI data in Collaborati from syncing to TeamConnect CSM.
Description: A new Office setting named **Office Timekeeper DEI Data** has been added to the Timekeeper Settings tab under the Office view to disable Timekeeper DEI data in Collaborati from syncing to TeamConnect CSM. This setting helps users stop syncing the Timekeeper DEI data from Collaborati to TeamConnect CSM.
For more information refer to the link.
Tracking Code: COLL-22264

Enhancement: Create line item custom fields on invoice line item creation.
Description: New Custom Fields named Timekeeper Classification and First Year in Current Category are added to the database. When a new invoice line item is created these custom field values will be captured in the database.
Tracking Code: COLL-22336

Enhancement: Add CSM Settings "Do not update the office currency field on the mapped contact record" on the Rate Currency Collaboration setting.
Description: A new CSM office setting named **Do not update the office currency field on the mapped contact record** has been added to CSM Settings page under the office setting section. By default, this setting is disabled. By enabling it on, Collaborati's updated currency information will not be synced to the CSM Office Contact record.
For more information, refer to the link.
Tracking Code: COLL-22338

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Enhancement: Billing Profiles Rules for Rate request validations to handle Timekeeper rate currency selection.

Description: On the CSM Billing Profile screen, a new tab named Rate Request Validations has been added with validation rules to handle the Timekeeper Rate Currency Selection features in Collaborati. This Rate Request Validations screen contains three validation rules that help in validating the Rate Requests. The rules are given below:

- RR101 - Validate Currency for Current and Proposed Timekeeper Rate.
- RR102 - Validate Timekeeper Rate and Office Currency.
- RR103 - Cannot approve a new Timekeeper Rate Currency if pending Invoices exist.

For more information, refer to the link.

Tracking Codes: COLL-22340, COLL-22341, COLL-22342, COLL-22343

Enhancement: CSM Rate Approval confirmation when currency will be updated.

Description: A warning message is added to the CSM Rate Approval screen when a rate request has at least one rate item checked for approval and the proposed timekeeper rate currency conflicts with the current rate currency on the associated contact record. The warning message displays as follows:

- *This rate request contains at least one proposed Timekeeper rate item checked for approval with a rate currency different from the current rate currency on the Timekeeper's contact record. The field "Overwrite Timekeeper Rate Currency on Approval" must be checked to Approve the rate request and rate items. Otherwise, uncheck the rate items with conflicting rate currency or reject the rate request.*

Tracking Code: COLL-22344

Enhancement: CSM 7.1 Setting for Timekeeper Rate Currency Collaboration.

Description: This setting automatically updates in Collaborati once the client upgrades to CSM 7.1 and runs the sync. By default, this setting is enabled, and it is not visible in the user interface.

Tracking Code: COLL-22624

Enhancement: CSM new field and rule validation for Overwriting Timekeeper Rate Currency.

Description: A new block **Rate Currency Collaboration** and field **Overwrite Timekeeper Rate Currency** has been added to the rate request view. This new setting is used to overwrite the overwrite timekeeper rate currency when users need to overwrite the existing currency upon rate request approval.

Tracking Code: COLL-22673

Enhancement: Update CSM Office User Interface - Contact currency, object view, last update audit History rule.

Description: On the CSM Office record, new fields named "Contact Billing Currency and Billing Currency Last Updated" are added under the General Information tab. A new tab named "History" has been added to help the users with the billing currency updates performed on the Office record.

- The Contact Billing Currency field will help users in displaying the associated Contact's rate currency value.
- Billing Currency Last Updated field will display the Office Billing currency updated date after successful CSM sync.

Tracking Code: COLL-22339

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Enhancement: Remove Timekeeper DEI from logs when CSM disabled Timekeeper DEI data sync.
Description: The CSM logs and New Timekeeper Authorization logs will not refer to Timekeeper DEI data when Timekeeper DEI data settings in CSM are activated to disable syncing the data in Collaborati to TeamConnect.
Tracking Code: COLL-23091

Enhancement: CSM Add Rate Item Number Column and Update Accepted Column.
Description: User Interface update has been performed on the Rate Item table of Rate Requests. Below are user interface changes:

- A new column named Rate Item Number has been added at the beginning of the Rate Item display table and the Rate Item warning message will be aligned with the Rate Item number.
- Approved Column checkbox field header is updated as Accepted.
- Removed currency column and added Current and Proposed rate columns. If both values are the same information will be displayed in both columns.

Tracking Code: COLL-23170

Enhancement: Contact rule to Unauthorize Timekeepers.
Description: A new Contact custom rule named Unauthorized and Reject Timekeeper has been created to reject and unauthorize the Timekeepers that are available in CSM. This custom action rule is disabled by default.
For more information, refer to link.
Tracking Code: COLL-22310

Enhancement: Update CSM with new CSM logger location.
Description: The user can configure the CSM log separately from the new CSM logging location this will make it easier for users to debug, troubleshoot, and find the root cause analysis. In a multi-node Collaborati Production setup, all CSM logs have been captured and are working.
Tracking Code: COLL-21564

5   Known Issues

Issue: When the setting "Automatically authorize timekeepers for all other offices" is activated, unassigning timekeepers for one office causes CSM Sync to fail.
Tracking Code: COLL-23810

Issue: CSM - Timekeeper Status is getting Changed from Authorized to Authorization Pending Rate Approval on trying to delete Timekeeper which has associated Rates in CSM.
Tracking Code: COLL-23807

Issue: Timekeeper is not deleted in CSM after it gets unauthorized in Collaborati.
Tracking Code: COLL-23804

Issue: Rate Requests fields are not displayed properly for the users with CSM Management rights.
Tracking Code: COLL-23776

Issue: When an existing Firm is updated with multiple email addresses, they are not synchronized with CSM.
Tracking Code: COLL-23775

Issue: The Home Office Rate Enabled setting is updated even if the cancel button is clicked in the warning popup.
Tracking Code: COLL-22280

6   Fixed Issues

Issue: When users try to view pending rate requests in CSM, an error message that states, "You must be Subscribed to this collection to view," is displayed on the screen.
Tracking Code: COLL-22262