

Collaborati Spend Management 7.0 Patch 1 Release Notes

Collaborati Spend Management® 7.0 Patch 1 (PCSM7000001) resolves the following issue:

Issue: New CSM setting to disable Timekeeper DEI data in Collaborati from syncing to TeamConnect CSM.

Tracking Code: SUPPORTPRI-68525

Case Number: None

Reported Version: None

Workaround

None.

Pre-Requisites

None

Steps to Reproduce

1. Add new CSM setting on Timekeeper Settings page:
 - a. Setting Section Header:
 - i. "Timekeeper DEI Data"
 - b. Explanation Text:
 - i. "Select the Timekeeper settings below if you do not want to sync Timekeeper diversity data from Collaborati. Enabling this setting will also remove any current Timekeeper diversity data from Collaborati that was previously synced to the CSM Timekeeper records. The Timekeeper DEI setting updates will run in the background, and users will be unable to modify the setting until the update completes. When the setting is unselected, the data changes will take place after the next successful synchronization with Collaborati has been completed.
 - c. Setting Text:
 - i. "Don't Allow CSM to Sync timekeeper diversity data from Collaborati" (Check/Unchecked).
2. Default value for "Don't Allow CSM to Sync timekeeper diversity data from Collaborati" is unchecked.
3. When "Don't Allow CSM to Sync timekeeper diversity data from Collaborati" is updated from unchecked to checked, the update to all the associated Office (Vendor) settings will run as a background action.
 - a. Any timekeeper records in CSM that currently have data populated in any of the diversity fields will be updated to null (not populated).
 - b. Display the following banner message when the background action is in progress: "The updates to the timekeeper diversity data are running in the background. Until this process completes, you will be unable to change the Timekeeper DEI data setting. You can return to this page or refresh the page to confirm this action has been completed."
 - c. When the background action completes successfully, display the following banner message: "Timekeeper DEI Setting successfully updated on {Date} ".

- d. If background action fails, display the following banner message: "Previous Update to Timekeeper DEI Setting was not Successfully Applied on {date}. Please check the system logs for additional details."
4. When "Don't Allow CSM to Sync timekeeper diversity data from Collaborati" is equal to Checked (True).
 - a. For new timekeepers created and then synced from Collaborati, CSM will not sync over any values for Timekeeper diversity fields.
 - b. For existing timekeepers that are updated in Collaborati and trigger a timekeeper record update sync, CSM will not sync over the values for Timekeeper diversity fields.
 - c. The New Timekeeper Authorization Wizard will NOT retrieve or display the Timekeeper Diversity field values from Collaborati
5. When "Don't Allow CSM to Sync timekeeper diversity data from Collaborati" is equal to unchecked the diversity field values in Collaborati for all associated timekeepers should be updated on the CSM Timekeeper record on the next CSM sync.
6. When "Don't Allow CSM to Sync timekeeper diversity data from Collaborati" is changed from Checked to Unchecked, a full timekeeper sync is required. The update to all the associated Office (Vendor) settings will run as a background action.
 - a. Display the following banner message when the background action is in progress: "The updates to the timekeeper diversity data are running in the background. Until this process completes, you will be unable to change the Timekeeper DEI data setting. You can return to this page or refresh the page to confirm this action has been completed."
 - b. When the background action completes successfully, display the following banner message: "Timekeeper DEI Setting successfully updated on {Date} ".
 - c. If background action fails, display the following banner message: "Previous Update to Timekeeper DEI Setting was not Successfully Applied on {date}. Please check the system logs for additional details."
 - d. The New Timekeeper Authorization Wizard would retrieve and display the Timekeeper Diversity fields as it currently functions today.

Expected Results of Steps

None.

Actual Results of Steps

None.

Root Cause Analysis

Timekeeper DEI backport changes.

Issue: Remove Timekeeper DEI from logs when CSM disabled Timekeeper DEI data sync.

Tracking Code: SUPPORTPRI-68526

Case Number: None

Reported Version: None

Workaround

None.

Pre-Requisites

TeamConnect Instance with Legal, FM and CSM.

Steps to Reproduce

1. When 'Don't Allow CSM to Sync timekeeper diversity data from collaborati' setting is turned OFF, Timekeeper DEI data got printed in all logs.
2. When 'Don't Allow CSM to Sync timekeeper diversity data from collaborati' setting is turned ON, Timekeeper DEI data not captured in CSM log and other logs when it is set to different logging levels.
3. Timekeeper DEI data not captured for both existing timekeeper and new timekeeper authorization irrespective of both global and office level setting.

Expected Results of Steps

Timekeeper DEI data not printed in root logger when 'Don't Allow CSM to Sync timekeeper diversity data from collaborati' setting is enabled.

Actual Results of Steps

Timekeeper DEI data is getting printed in the root logger when 'Don't Allow CSM to Sync timekeeper diversity data from collaborati' setting is enabled.

Root Cause Analysis

Timekeeper DEI backport changes.

Issue: Duplicate Rate Requests are being created after a CSM Sync.

Tracking Code: SUPPORTPRI-68346

Case Number: 2022-1207-6365147

Reported Version: TCE 6.3.3

Workaround

Yes. Delete the duplicate rate request (that does not have any workflow) by disabling the security rule, 'Deny Delete if not final' on the Rate Request object.

Pre-Requisites

Client versions :

- TCE - 6.3.3
- LMM - 5.0.1
- FMR - 6.3.2
- CSM - 6.3.5
- Active Vendor
- Active Timekeepers

Steps to Reproduce

1. Submit a rate request from collaborati.(A timekeeper rate. NO need to select a matter)
2. Run the CSM sync.

Expected Results of Steps

Only 1 Rate request must be available in TeamConnect post CSM Sync.

Actual Results of Steps

Two Rate requests come to TeamConnect . One is pushed to workflow. Another does not have a workflow and 'Approve' or 'Reject' buttons.

Root Cause Analysis

Retrying syncing rate request when optimistic lock exception is encountered.

Issue: Grammatically incorrect Collaborati rejection comment.

Tracking Code: SUPPORTPRI-69087

Case Number: 2023-0814-7948252

Reported Version: CSM 7.0

Workaround

No

Pre-Requisites

- TCE 7.0 with PB5.
- CSM 7.0
- Active CSM connection.
- Set Up an invoice auto rejection rule in TeamConnect.

(For issue replication, we can set a rule under line item - custom action rule)

-Class file

-Rule

Note : The rejection message can be replicated in any other way as well. We have tried auto rejecting invoice if line item total is made 0 by a billing profile rule. Just to print the rejection message prefix.

Steps to Reproduce

1. Throw an exception from the class file associated with a custom action rule that's triggered on invoice creation.
2. Submit an invoice from Collaborati.

Expected Results of Steps

"This invoice was rejected for" prefix for rejection comment is grammatically correct.

Actual Results of Steps

"This invoice was rejected as" prefix for rejection comment is grammatically incorrect.

Root Cause Analysis

Localized grammatically incorrect invoice rejection comments.

Issue: High latency for office authorization.

Tracking Code: SUPPORTPRI-69129

Case Number: 2023-0928-8001634

Reported Version: TCE 7.0

Workaround

No

Pre-Requisites

- TC 7.0
- CSM 7.0
- Client does not have Legal and Finance modules. They are upgrading from the 4X version.

- Active CSM connection.

Steps to Reproduce

Go to the CSM home page and try to authorize the pending vendors.

Expected Results of Steps

Vendor authorization should complete in a short time.

Actual Results of Steps

Vendor authorization takes more than 5 mins (From clicking on New vendor authorization to complete/done screen).

Root Cause Analysis

Performance issue.

Issue: Timezone independent fields on embedded object are off by a day

Tracking Code: SUPPORTPRI-69162

Case Number: 2023-1014-8020602

Reported Version: TCE 7.0 PB3

Workaround

No

Pre-Requisites

- TC7 with PB3
(PB3 is supposed to resolve the issue -Issue: TimeZone Independent fields, when rendered on a custom screen using the tc:date tag, are getting shifted by the user's timezone.
- Tracking Code: SUPPORTPRI-63108)
 - CSM 7
 - Active Collaborati client with ability to submit / review the budget requests.
 - Timezone for the location / browser is ET
 - Timezone in the user preferences is set to GMT-05:00 Eastern Time (US & Canada)

Steps to Reproduce

1. Submit an annual budget for a matter
(Eg : 2024 - Period Jan 1st 2024 to DEC 31st 2024)
2. Save the budget request. Budget accounts fields, on budget request is an embedded object which shows period dates off by a day. (Eg : 12/31/23 - 12/30/24)
3. Now, Enable the option introduced in TC 7 PB3. -ENABLE TIME ZONE SYNC .
4. Update and ensure it is enabled.
5. Logout and login.

Expected Results of Steps

The period dates should not be off by a day

Actual Results of Steps

The period start and end dates are off by a day

Root Cause Analysis

Start and End dates are considered timezone dependent by default

The fixes in this patch will be merged into CSM 7.2

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 7.0 Patch 1.
 - 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