

## Collaborati Spend Management 7.0 Patch 3

### Release Notes

**Collaborati Spend Management® 7.0 Patch 3 (PCSM7000003) includes fixes from CSM 6.3.5 Patch 5 to 7 as well as CSM 7.0 Patch 1 and 2:**

**Issue:** Rate requests get approved when the Timekeeper currency in TeamConnect is different from the 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 it.

#### Pre-Requisites

- Reproduced on:
  - TCE 6.3.3
  - LMM 5.0.1
  - FMR 6.3.1
  - CSM 6.3.1
- Active Vendor
- Active Timekeepers
- Matters synced to Collaborati
- Also checked the same issue on the latest instances below:
  - 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 from the currency in Collaborati.
6. Approve the rate request and run the CSM sync.
7. Approved rate request shows 'Invalid Rate Item' and the rate is not synced. The 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 be approved or show an error that the currency is different. The 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

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

CSM 6.3.1 & TCE is 6.3.3

Able to reproduce on CSM 6.3.7.

=====

-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, 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

None.

## 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 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 the 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 Exceptions when trying to Approve Invoices where the 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 to 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

The 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.

---

**Issue:** Office Deactivation Should Not Delete Timekeeper Records

**Tracking Code:** SUPPORTPRI-63864

**Case Number:** None

**Reported Version:** None

### Workaround

None.

## Pre-Requisites

None.

## Steps to Reproduce

In CSM, navigate to the record for an office that has at least one authorized timekeeper and click "Deactivate".

## Expected Results of Steps

The timekeeper records for the above office's timekeepers still exist.

## Actual Results of Steps

The timekeeper records for the above office's timekeepers are deleted.

## Root Cause Analysis

A mistake in a previous ticket in 6.2.6, timekeeper records should not be deleted.

---

**Issue:** AFA Information OOTB block needs CSM Setting View Right in Group Settings

**Tracking Code:** SUPPORTPRI-67538

**Case Number:** 2023-0523-7852772

**Reported Version:** TCE 6.3.3

## Workaround

Add all 3 CSM rights-"View CSM Settings Records", "View CSM Settings All Categories", and "View CSM Settings All Custom Fields".

## Pre-Requisites

TCE 6.3.3, LMM 5.0.1, FM 6.3.1 and CSM 6.3.5

## Steps to Reproduce

1. Create a dispute matter.
2. Do not add AFA through the 'Module Setup Tool'.
3. Add the AFA information OOTB block to the Dispute matter object view.
4. The information is not visible to Normal users unless they have a checkbox selected for "View CSM Settings Records", "View CSM Settings All Categories", and "View CSM Settings All Custom Fields".
5. For local replication, the user can use only View Rights on most of the objects and not select any right under the CSM Settings object (Under both System and Category Rights).

## Expected Results of Steps

CSM rights should not have any impact on access to the Dispute object and its blocks.

## Actual Results of Steps

AFA information is not visible to Normal users unless they have a checkbox selected for "View CSM Settings Records", "View CSM Settings All Categories", and "View CSM Settings All Custom Fields".

## Root Cause Analysis

AFA Block has a dependency on the CSM Settings Record.

---

**Issue:** CSM Settings > Task Codes > When clicking on 'Apply to All Vendors' with 100s of Task Codes/Offices, the page times out.

**Tracking Code:** SUPPORTPRI-67791

**Case Number:** 2023-0503-7830388

**Reported Version:** CSM 6.3.5

**Workaround**

NA

### Pre-Requisites

- An active connection must exist between CSM and Collaborati.
- Reproduce will require 100s of Task Codes and authorized Offices. E.g. the user has 327 Task Codes and 1015 Offices.
- CSM Version - 6.3.5 PATCH 5.
- TCE Version - 6.3.3.

### Steps to Reproduce

Go to CSM Setting > Task Codes > Edit and Uncheck the Task Code > Click on Apply to All Offices > Pages keep on Spinning and throw 504 Gateway Time-out error.

### Expected Results of Steps

Updating Task Codes across Offices should not take long and needs to be efficient.

### Actual Results of Steps

'Apply to All Vendors' takes a long time and then a 504 error shows up.

### Root Cause Analysis

None.

---

**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**

Delete the duplicate rate request that isn't in workflow by disabling the security rule, "Deny Delete if not final" on the Rate Request object.

### Pre-Requisites

1. Client versions :
  - TCE 633
  - LMM - 501
  - FMR- 632
  - CSM -635
2. Active Vendor.
3. Active Timekeepers.

## Steps to Reproduce

- Submit a rate request from collaborati. (A timekeeper rate. No need to select a matter.)
- Run the CSM sync.

## Expected Results of Steps

Only one Rate request must be available in TeamConnect after a CSM Sync.

## Actual Results of Steps

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

## Root Cause Analysis

When an optimistic lock exception occurs, a syncing rate request is retried.

*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 3.
  - 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**