ELM Release Notes - March 2023

What's New

- Bulk Invoice Approval Enhancements: Provides ability to approve multiple invoices at one time via My Pending Invoices.
  - Bulk Approval option now available on dashboard of Invoices App.
    - When the bulk action is selected, a launch form provides the user an option to add a comment (optional).
    - This comment is added to all invoices that are selected.
    - When the form is submitted, the App creates a related transaction in the Bulk Invoice Approval App. This initiates the invoice approval process.
  - Email notification is sent to the Invoice Approver with details of the batch process, when the process completes.
  - Invoice Approver can view the status of all (current/past) bulk invoice approvals that were triggered via the new Invoice Bulk Approval App.
    - Total number of invoices selected for approval in each batch.
    - Invoices that were successfully approved.
    - Invoices that failed during the approval process.
    - Invoices that were skipped because they were previously selected by another batch.
  - Added "Bulk Approval" flag to hide invoices in the invoice widget during the bulk approval process (to prevent duplicate approval).
  - Client Invoice Reviewer can now view on the Invoices Dashboard if an invoice contains no warning to assist in the selection of invoices for bulk approval.
  - Client Invoice Reviewer can now view on the Invoices Dashboard if an invoice contains no adjustments to assist in the selection of invoices for bulk approval.
- Client Timekeeper Rate Reviewer will now receive the approval notifications as specified below:
  - Added a field in ELM config for "timekeeper approver(s)" for new timekeeper rate requests.
  - The approver(s) will receive one daily digest email for newly submitted timekeepers from that day.
    - Daily notices are sent Mondays - Fridays only with weekend submissions included on Monday. If there are no new TK rates that day, then the email is not sent.
- Notification created to send request to vendor billing contacts to provide their annual timekeeper rates for review.
  - Notification includes instructions, and a link to vendor's BillingPoint, to download/re-upload timekeeper template required to submit rate requests.
  - Users can send request to:
    - One vendor
    - A subset of vendors
    - All vendors.
- Invoice New View
  - For Monthly Retainer invoices, the adjustment column in Monthly and Matter widgets is now visible.
  - Line-item descriptions in the comment popup are now visible at the top of Invoice New View.
  - Hover over functionality now available for UTBMS code description to display on Invoice New View.
  - Unread indicator on invoice alerts is now available on Invoice New View.

- Line-item comment box size now adheres to the size of the comment text on Invoice New View.
- Custom PDF options now exclude alerts or adjustments on the PDF if those sections are not selected.
- Editing the "Sent By" when Send Invoice PDF is used, now displays within the body of the email message in addition to CC.
- TK Rate Review iFrame Styling updates with full page (reactive) sizing and colors updated.
- Vendor submitted rate is now captured on Timekeeper Rate (Timekeeper Rate Adjustment) field.
- Allocation Application condition to "Update amount" button is now added.
- "Include in Recents" is now disabled from the Settings page of the following apps:
  - Allocation
  - Billing Authorization Requests
  - Contact Involvement to Matter
  - Group Preference
  - Security Groups
  - Sync Data App
  - User Profiles
  - Invoice Payment.

- Matter App fields, matter_participants and matter_participants_bson, are now recalculated based on participant adding or deleting BRs in ELM.
- Tool Tip now added to remind user to manually update Invoice Tracking Date field in BillingPoint.
- Added Tool Tip to Invoice Summary Header Widget that constantly displays to advise users the totals are not automatically refreshed.

Resolved Issues

- Added warning message to display on invoice if AFA fixed fee exceeds the amount limit.
- Bulk Custom Invoice PDF email option is now functional.
- Transaction Updated Business Rules, that use changes_hash in their conditions, are now evaluating.
- Condition for the business rule "Propagate changed Matter Name to Child App Atoms" is now updated to use changes_hash.
  - Matter name in Child Apps updates correctly when parent Matter name is changed.

- When a matter has an allocation, invoices no longer remain in "Sending" status in BillingPoint.
- Unnecessary currency conversions no longer cause inaccurate data client(s).
  - Calculations now use historical spot rate amount for the invoice instead of the current effective spot rate.

- Fiscal records "Invoice Count" and "Total Spend" are now updating with invoices submitted.
- Matter Manager is now updating on the "Matters" tab on Invoice New View.
- Removed extra blank space from all secondary and tertiary tabs in Invoice New View.
- Timekeper Base Rate during hover over now displays when there is a line-item discount on Invoice New View.
- Warning message is now visible on Alerts tab within Invoice New View.
- Alerts and Adjustment tabs in Invoice New View do not display sections with zero counts when no data is available.
- Invoice discount line-item description is now set to an empty string to eliminate breaks that occurred in the Invoice New View.
- Fiscal Records are now updating with invoice data for the second invoice after the first invoice has been disputed.

- Email PDF Invoices no longer show Sent By as *no-reply=onit.com@app.onit.com* *"on behalf of"* *no-reply@onit.com*.
- UI issue on Timekeeper Rate Review page is now resolved.
- When downloading zip files attached to invoices where multiple attachments have the same filenames, all files are downloaded, and duplicate filenames are adjusted.