



Immune 20.0.1 Patch Readme for MC23424: Budget Enhancements

Controlled Availability

04 Aug 2023

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Revision History

Release Date	Description
04 Aug 2023	Release of Immune 20.0.1 Patch Readme for MC23424: Budget Enhancements

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Work Sample

Patch Description

This section provides release details and describes the product changes that are made by this patch.

Release Details

Version	Immune 20.0.1 with the following file installed: <code>budget-enhancements-1.0.0.bundle</code>
Release Date	04 Aug 2023
Availability	Controlled Availability

Product Changes

This patch makes the following product changes.

Issue	Change	Number
Immune users are not able to enforce budgets that have a fee subtype because the current invoice rule applies only to total budgets.	After you install this patch, to enforce budgets that have a Fee or Fee/Expense subtype, the Invoice Rules - Exceeds Fee Budget rule has been added to the Invoice Rules Administration menu in Immune.	Matter and Spend: MC23016/ MC23407/ MC23408/ MC23409/
The Invoice Rules - Exceeds Budget needs to be renamed as Invoice Rules - Exceeds Total Budget.	After you install this patch, the Invoice Rule - Exceeds Budget has been renamed as Invoice Rule - Exceeds Total Budget.	Matter and Spend: MC23425
When users create budget in a specific currency for a matter and the invoices submitted have a same currency, currently Immune converts the invoice amount to base currency. The difference in the currency conversion is causing the Invoice Rules - Exceeds Total Budget rule to execute incorrectly and the invoices are getting flagged or rejected.	After you install this patch, when users create budget in a specific currency for a matter and the invoices submitted have a same currency, Immune does not convert the invoice amount to base currency. The Invoice Rules- Exceeds Total Budget executes as expected and invoices are getting flagged or rejected according to the rule configuration.	Matter and Spend: MC23566

Installing the Patch

This section describes how to install the patch.

Prerequisites

Before you install this patch, you must comply with the following prerequisites:

- You must have a working installation of min version of Immune 20.0.1.
- You must log on to Immune as a user with administrator access.
- You must log on to the Immune server as a user with administrator access

Database Table Basic Count Check

You can use a database table basic count check to verify the state of a database before and after an application upgrade and restoration. You must complete a database table basic count check before performing a Immune upgrade or update, and you must complete a second database table basic count check to revert the database to its previous state.

To perform a database table basic count check, perform the following steps:

1. Log on to SQL Server Management Studio.
2. Execute the following script against your Immune database:

```
SELECT QUOTENAME(SCHEMA_NAME(sOBJ.schema_id)) + '.' +  
QUOTENAME(sOBJ.name)  
AS [TableName], SUM(sPTN.Rows) AS [RowCount]  
FROM  
sys.objects AS sOBJ  
INNER JOIN sys.partitions AS sPTN  
ON sOBJ.object_id = sPTN.object_id  
WHERE  
sOBJ.type = 'U'  
AND sOBJ.is_ms_shipped = 0x0  
AND index_id < 2 -- 0:Heap, 1:Clustered  
GROUP BY  
sOBJ.schema_id, sOBJ.name ORDER BY [TableName]  
GO
```

Note: The SQL script is generic and collects information from all tables within the schema, including custom Immune tables.

3. Record the table count check that is returned from the SQL script.
4. To verify that the restoration is correct and complete, you can compare the table count check that was obtained from your initial database with the table count check that you obtain from the restored database.
5. To create an additional spot check of key Immune database tables, execute the following script against your Immune database:

```
select count(*) from p_matter (nolock)  
select count(*) from p_invoice_header (nolock)
```

```
select count(*) from p_organization (nolock)
select count(*) from p_person (nolock)
select count(*) from p_operation_log (nolock)
select top 10 * from p_operation_log order by id desc
```

6. Record the output that is returned from the script.
7. To verify that the restoration is correct and complete, you can compare the output that was obtained from your initial database with the output that you obtain from the restored database.

Install Java Runtime Environment for the Patch

You can verify that the Immune instance is running with jre1.8.0 by checking for the presence of the following directory:

`ImmuneInstallDir\Datacert\Immune\jre\jre1.8.0`

(ImmuneInstallDir is the directory where the Immune patch files are located)

NOTE: This jre file is used for running the install.bat file and the uninstall.bat file. It is not intended for upgrading the JRE version of Immune.

If the Immune instance is not running with jre1.8.0, perform the following steps:

1. Download the Amazon Corretto 8 JRE for Windows x64 file (amazon-corretto-8-x64-windowsjre.zip) from the following location:

`https://corretto.aws/downloads/latest/amazon-corretto-8-x64-windows-jre.zip`

2. Extract the contents of the amazon-corretto-8-x64-windows-jre.zip file to a temporary location.
3. From the temporary location, copy the contents of the jre8 folder to **PatchPath\jre\jre8**.

(**PatchPath** is the location where you extracted this patch)

4. Verify that java.exe is located in the following location:

`PatchPath\jre\jre8\bin\java.exe`

Pre-Installation

Before you install this patch, perform the following steps:

1. Verify your current installation:
 - a. Click **APPS**, and select **Administration**.
 - b. Click **MENU** and, under the **APPLICATION SETTINGS** category, select **System Information**.
 - c. Verify that the Framework Version indicates the update release.

For Immune 20.0.1 the Framework Version is displayed as 20.0.1.XXXXXX, where XXXXXX is the build number.

2. Suspend any active Immune-related jobs:
 - a. Click **APPS**, and select **Administration**.
 - b. Click **MENU** and, under the **APPLICATION SETTINGS** category, select **Scheduled Jobs**.
 - c. Select the check boxes next to all active scheduled jobs.

Note the jobs that you suspend so that you can resume them after you complete the installation.

Click **Suspend**.

3. Stop the following services:
 - Immune (Apache Tomcat X.X Immune, where X.X is the version of the service, such as 7.0)
 - Apache-Immune
 - IBM Cognos

4. If legacy OMA is installed, stop the following services:
 - ObjectBroker
 - MessageClient
 - TaskService

5. If the Datacert Sd3 Adapter service is installed, stop the service.

6. If Immune is configured for single sign-on (SSO) in standard mode, perform the following steps:

NOTE: If Immune is configured for SSO in mixed mode, you do not have to perform step 6.

- a. Comment out the following line in the

`ImmuneInstallDir\Datacert\Immune\apache\conf\httpd.conf`

file by adding a leading # as shown:

```
#Include c:/datacert/Immune/shibboleth-sp/etc/shibboleth/
apache24.config
```

- b. Back up the value of the logoutUrl attribute by using the following script:

```
select * from P_MBEAN_CONFIG where attributeName = 'logoutUrl'
```

- c. Change the logoutUrl attribute and the authFilterMode attribute in the P_MBEAN_CONFIG table by

using the following script:

```
IF EXISTS (select * from P_MBEAN_CONFIG where attributeName =
'logoutUrl') BEGIN
```

```
Update P_MBEAN_CONFIG set attributeValue =
'/j_spring_security_logout'
```

```
where attributeName = 'logoutUrl'
```

```
END ELSE BEGIN
```

```
Insert into P_MBEAN_CONFIG
```

```
values('applicationUrlConfig','logoutUrl','/')
```

```
j_spring_security_logout')
END GO
Update P_MBEAN_CONFIG set attributeValue = 'Local' where
attributeName =
'authFilterMode' GO
```

7. Back up your database and virtual machine.
8. Perform a database table basic count check on your database.

For more information, refer to *Database Table Basic Count Check*.

Installation

To install this patch, perform the following steps:

1. Access the Immune patch files from the following location:

ImmuneReleaseDir\R22.2\Patches\Controlled Availability\MC-23424_budgeting_enhancements-PP20.0.1_to_PP22.x.zip file.

(**ImmuneReleaseDir** is the directory where the patch files are located)

2. Extract the files from the MC-23424_budgeting_enhancements-PP20.0.1_to_PP22.x.zip file.
3. If you cannot locate the **ImmuneInstallDir\Datacert\Immune\jre\jre1.8.0\bin\java.exe** file, refer to Install Java Runtime Environment for the Patch.
4. To install the patch files, right-click the install.bat file and select **Run as administrator**.
5. To continue, press any key.
The batch file command prompt closes.
6. If Immune is configured for SSO in standard mode, perform the following steps:
 - a. Stop the following services:
 - Immune
 - Apache-Immune
 - b. Stop the Shibboleth 2 daemon service.
 - c. Restore the backed-up value of the logoutUrl attribute from Pre-Installation step **6b** by using the following script:

```
Update p_mbean_config set attributeValue = '<backedup_value>'
where attributeName = 'logoutUrl'
```
 - d. Change the authFilterMode attribute to its original value in the P_MBEAN_CONFIG table by using the following script:

```
Update p_mbean_config set attributeValue = 'SAML' where
attributeName = 'authFilterMode'
```
 - e. Start the IBM Cognos service.
 - f. If legacy OMA is installed, start the following services:
 - ObjectBroker

- MessageClient
 - TaskService
- g. If the Datacert Sd3 Adapter service is installed, start the service.
- h. Log on to Immune as a user with administrative access.
- i. Resume the scheduled jobs that you suspended in Pre-Installation **step 2**:

Post-Installation

None.

Work Sample

Uninstalling the Patch

To uninstall this patch, perform the following steps:

1. Suspend any active Immune-related jobs:
 - a. Click **APPS**, and select **Administration**.
 - b. Click **MENU** and, under the **APPLICATION SETTINGS** category, select **Scheduled Jobs**.
 - c. Select the check boxes next to all active scheduled jobs.
 - d. Click **Suspend**.
2. If legacy OMA is installed, stop the following services:
 - ObjectBroker
 - MessageClient
 - TaskService
3. If the Datacert Sd3 Adapter service is installed, stop the service.
4. Start the IBM Cognos service.
5. If the Sd3 Adapter service is installed, start the service.
6. If legacy OMA is installed, start the following services:
 - ObjectBroker
 - MessageClient
 - TaskService
7. Resume the scheduled jobs that you suspended in **step 1**:
 - a. Click **APPS**, and select **Administration**.
 - b. Click **MENU** and, under the **APPLICATION SETTINGS** category, select **Scheduled Jobs**.
 - c. For each job that you suspended, if the Next Occurrence is in the past, click the **edit** icon to edit the job and set Appointment Time to a date and time in the future.
 - d. Select the check boxes next to the scheduled jobs that you suspended.
 - e. Click **Resume**.