

Collaborati Spend Management

6.3.1 Patch 1

Release Notes

Collaborati Spend Management® 6.3.1 Patch 1 (PCSM6310001) resolves the following issue:

Issue: Data on contact card is overwritten or wiped when the card is manually mapped to a timekeeper with auto-create and auto-update contact record turned off

Tracking Code: SUPPORTPRI-64760

Case Number: 2022-0627-51763

Reported Version: TCE 6.3.3, CSM 6.3.1

Workaround

None

Pre-Requisites

A TCE instance connected to Collaborati. Auto-create and auto-update contact records should be disabled.

Steps to Reproduce

- Login to TeamConnect
- CSM Settings > General > Disable the checkbox "Automatically authorize Collaborati timekeepers and create new contact records with Collaborati timekeeper information"
- CSM Settings > General > Disable the checkbox "Automatically update Contact records with latest Collaborati timekeeper information"
- CSM settings > Office > Timekeeper
- Click on "New Timekeeper Authorization"
- Create a contact manually with a name, Job Title, middle name, company, phone number, and email id filled with details other than the timekeeper name created in Collaborati
- Assign manual contact to the Timekeeper
- Authorize the timekeeper
- Verify the details of the contact created manually in TeamConnect

Expected Results of Steps

Existing data on the contact card should remain intact.

Actual Results of Steps

Data is overwritten with Collaborati data or wiped.

Root Cause Analysis

This issue occurs when both auto-create and auto-update are off. Auto-create is turned off when a User wants to manually map their timekeepers in TeamConnect to an existing contact. If auto-update contact cards is turned off, the Collaborati contact card info should not be pushed to the mapped TeamConnect contact card. If auto-update contacts cards is turned on, it should push the Collaborati contact card information to the mapped TeamConnect contact card. Because of the defect, contact cards were being updated regardless of the auto-update setting being on or off.

This fix will be merged into the CSM 7.0 Update.

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 6.3.1 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