MITRATECH

Collaborati Spend Management
6.3.1 Patch 3
Release Notes

Collaborati Spend Management® 6.3.1 Patch 3 (PCSM6310003) resolves the following issues:

Issue: CSM Sync > Initiating a stop for CSM sync takes a long time to fully stop and timekeeper authorization wizard performance issues.
Tracking Code: SUPPORTPRI-66742
Case Number: 2023-0127-7638011
Reported Version: CSM 6.3.1

Workaround

None

Pre-Requisites

- In CSM Settings > General, the "Automatically authorize Collaborati timekeepers and create new contact records with Collaborati timekeeper information" setting is set to 'No'.
- In CSM Settings > General, the "Automatically update Contact records with latest Collaborati timekeeper information" setting is set to 'No'.
- In Collaborati, there needs to be decent number of invoices and new timekeepers needing to be synced to TeamConnect to be authorized.

Steps to Reproduce

A CSM Admin needs to start the CSM sync and after ~10 seconds, hit the 'Stop' button.

Expected Results of Steps

1. If a user clicks the 'Stop' button, the CSM sync should suspend syncing at a logical halting point.
2. The Timekeeper Authorization wizard should not experience a long loading period.

Actual Results of Steps

1. If a user clicks the 'Stop' button, CSM sync takes a long time to fully stop.
2. The Timekeeper Authorization wizard takes a long time to load.

Root Cause Analysis

The invoice synchronization can be very long and doesn't need to be fully finished in order for the sync to be stopped. This patch will periodically check if the user has initiated the sync stop.

The timekeeper contact matching is doing a case insensitive search. Using the uppercase fields will do the search efficiently.

Issue: Searching timekeepers awaiting authorization by 'Country' does not return any results.
Tracking Code: SUPPORTPRI-66746
Case Number: 2022-0627-951278
Reported Version: TCE 6.3.3, CSM 6.3.1

Important: In addition to this patch, the fix for this issue will also require Collaborati 4.7, which will not be available until after the release of this patch. See 'Root Cause Analysis' for details.

Workaround

None

Pre-Requisites

At least one timekeeper waiting to be authorized in TeamConnect.

Steps to Reproduce

1. In the Timekeeper Authorization wizard, hit the 'Show Search' button.
2. In the 'Country' dropdown list, select the country listed on one of the timekeepers awaiting authorization.
3. Hit 'View'.

Expected Results of Steps

The search should return the timekeeper that had the selected country listed.

Actual Results of Steps

The search doesn't return any timekeeper.

Root Cause Analysis

The CSM is requesting an attribute from the timekeeper's office rather than the timekeeper itself, but the proper timekeeper attribute in Collaborati returns the county, rather than the country. So, the fix requires a change in both, CSM and Collaborati.

This fix will be merged into the CSM 7.1 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 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