Collaborati Spend Management
6.3.5 Patch 6
Release Notes

Collaborati Spend Management® 6.3.5 Patch 6 (PCSM6350006) resolves the following issue:

Issue: Office Deactivation Should Not Delete Timekeeper Records
Tracking Code: SUPPORTPRI-63864
Case Number: None
Reported Version: None

Workaround
None

Pre-Requisites

- TeamConnect Instance with CSM, Legal and FM installed.
- A user with all rights.
- There should be a successful connection between CSM and Collaborati.
- Office which has at least one authorized timekeeper should exist.

Steps to Reproduce
In CSM, navigate to the record for an office which 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

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", "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 'Module Setup Tool'.
3. Add the AFA information OOTB block to 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", "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 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", "View CSM Settings All Custom Fields".

Root Cause Analysis
AFA Block having dependency on 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. For 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
Updating Task Codes across Offices should not take long and needs to be efficient.

Root Cause Analysis

None.

This fix will be merged into the CSM 7.1 Update.

<u>Important</u>**:**

- **This cumulative patch contains all fixes from CSM 6.3.5 patches 1 to 5.**
- **Follow the below instructions if CSM 6.3.5 patch 5 (6.3.0.0051-P5.01) is already installed:**
  - **Go to Setup > Object Definition > CSM Settings.**
  - **Expand CSM Settings and go to Office.**
  - **Expand Office and click on Rate Request.**
  - **In Rate Request Object, go to Custom Messages tab and select the following Message Keys and delete them-**

    - **custom.RTR$.rule.RuleRateRequestAddRatesToTimekeeperUASYS.validate CurrencyCodeTimekeeper**

    - **custom.RTR$.rule.RuleRateRequestAddRatesToTimekeeperUASYS.validate CurrencyCodeDefaultTimekeeper**

  - **Close the setup.**
  - **Follow the regular patch Instructions.**

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 6.3.5 Patch 6.
   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