TeamConnect® Enterprise 6.3.7 Patch Bundle 7

Release Notes

TCE 6.3.7 Patch Bundle 7 (PTC6370007) resolves the following issues:

Issue: Review email notifications stopped working after applying Patch bundle 3 to TeamConnect 6.3.7.
Tracking Code: SUPPORTPRI-68377
Case Number: 2023-0712-7908886
Reported Version: TCE 6.3.7 PB3

Workaround
No.

Pre-Requisites

- TeamConnect 6.3.7 instance.
- TC 6.3.7 PB3
- Create an approval rule to post an invoice (the rule must be active while testing this).
- The user (who posts an invoice) and the reviewer must enable email notifications under user preferences.

Steps to Reproduce

1. Create an invoice, post it, and send it for review to the reviewer (the reviewer is able to get email notifications for reviewing the invoice).
2. Once the reviewer has submitted the review with comments, the user (who created and posted the invoice for review) should be able to get the review notifications with comments.

Note:

1. Before applying TCE 6.3.7 PB 3, the user is able to get review notifications.
2. Other notifications are working as expected, with the only issue being the review notifications.

Expected Results of Steps
The user must be able to get review notifications after the reviewer has submitted the review with comments.

Actual Results of Steps
The user is not able to get review notifications after the reviewer has submitted the review with comments.

Root Cause Analysis
Accommodated the case when ‘set expiration date’ is not set so that email notifications will work.

Issue: Multi-select field Search Filter Criteria value does not get added to list entry in custom search.
Tracking Code: SUPPORTPRI-62326
Case Number: 2021-0618-795104
Reported Version: TCE 6.2.6

Workaround
No

Pre-Requisites
Custom Search Filter with Multi-Select Search field.

Steps to Reproduce
1. Create a Multi-Select Search field in the Filter Display of Custom Searches under Matter Object Definition (for Amgen, under IP Lit Obj. Definition).
2. Once added to the Search, Navigate to the Custom Search under Matters tab.
3. Add the newly created Multi-select Search Field as one of the Filter Criteria.
4. Type something from the List in the Search Box and once you see it in a list below the box, click on it.

Expected Results of Steps
The selected value must be added to the Pick list on the right side of the Search box as one of the criteria and work as a Filter Criteria.

Actual Results of Steps
The selected value stays in the box, doesn't get into the pick list for Filter Criteria and it doesn't aid with the search at all.

Root Cause Analysis
There are 2 bugs:
1. While generating a BindAutoCompletion request we are not properly encoding the url.. eg. "[" in field name is giving a javascript error of invalid url.
2. postAutoSuggest and addSelectedOption js custom functions are missing in Core/webui-parent/webui/src/webapp/scripts/yui-user-defined.js file.

Root cause of this issue is that this file could have been replaced directly without incorporating the custom changes made by us when we upgraded to yui 2.9.0. Whenever we upgrade to a new version, we have to make sure all the custom changes are duly incorporated in the new yui files.

Issue: Audit rule is not triggered when a default rate is deleted.
Tracking Code: SUPPORTPRI-67616
Case Number: 2023-0404-7735127
Reported Version: TCE 6.2.2

Workaround
A custom action can be created as a work around.

Pre-Requisites
NA

Steps to Reproduce

1. Go to Setup.
2. Navigate to the History object.
3. Create a category called 'Contact Default Rate Audit.
4. Create a custom field for that category.
5. Navigate to the Contact Object Definition.
6. Create an Audit Rule to trigger on Update.
7. Set the Qualifiers to be:
    a. Current Object .defaultRateList - Is Item Modified.
    b. Current Object .defaultRateList - Is Item Deleted.
8. Set the rule to fire on ANY of the conditions (OR logic).
9. Configure the Action tab as necessary to create a history.
10. Save the Action tab to save to the Contact object using the default description.
11. Set the History Category and Custom Fields to 'Category Default Rate Audit' and the field label for the custom field.
12. Activate the rule and save.
13. Go to the UI and edit a contact
14. Click Rates and edit Default Rates.
15. Edit a Default Rate and save.
16. Go to the history tab and observe when a history is created.
17. Go back to Rates and edit Default Rates.
18. Create a Default Rate and save.
19. Go to the history tab and observe when a history is created.
20. Go back to Rates and edit Default Rates.
21. Delete a rate.
22. Go back to history and observe there is no history for the deletion.
23. Check the logs and observe the rule was executed but there was no description.

Note: This was able to repro on 6.2.2 and 7.0.

Expected Results of Steps
It should record the history.

Actual Results of Steps
The rule was executed but there was no description. According to the logs, the description was empty. The part that shows the deletion is here (condition 1 is false, condition 2 is true).
It's not clear why the default description is empty. It's also not clear why the 'is modified' qualifier works for creation and modification but not deletion. I would think it would just apply if a default rate is changed, and that you would need a created qualifier to trigger on new rates.

Root Cause Analysis
Added changes to include delete method to track audit changes while child objects getting deleted as a part of update.

Issue: Unable to select the multi values checkboxes in a multi value custom search field under object definition.
Tracking Code: SUPPORTPRI-68512
Case Number: 2023-0901-7969660
Reported Version: TCE 6.3.6 Patch 7

Workaround
It is working fine if the user tries to add values manually.

Pre-Requisites
Custom Search filter with multi-select search field.

Steps to Reproduce
1. Create a Multi-Select Search field in the Filter Display of Custom Searches under Matter Object Definition.
2. Once added to the Search, Navigate to the Custom Search under Matters tab.
3. Add the newly created Multi-select Search Field as one of the Filter Criteria.
4. Try to select the multi values from the pick list box.

Expected Results of Steps
The selected multi values checkboxes must be added to the Pick list on the right side of the Search box and work as a Filter Criteria.

Actual Results of Steps
Unable to select the multi values checkboxes, if we select one checkbox also that is not getting added in the filter criteria.

Root Cause Analysis
The problem arose due to the introduction of a new variable in the searchFieldAjaxCall, where the variable parameters were not updated consistently across all instances where it was utilized. To address this issue, the resolution involved repositioning the new variable to the last position. This adjustment ensures that, even if JavaScript interprets it as undefined, it does not disrupt any functionality and continues to operate as originally intended for its initial purpose.

Issue: When "Approver approves once and is skipped in subsequent stops" setting is used, Route Conditional evaluates the former stop member.
Tracking Code: SUPPORTPRI-69292
Case Number: 2023-0721-7920552
Reported Version: TCE 6.3.7

Workaround
No.

Pre-Requisites
1. TCE 6.3.7 PB 1- 4
2. TC Legal 5.x and latest applicable FMR installed.
3. Upload attached class files to Top Level/System/Object Definitions/Invoice/Rules/Automated Qualifiers.
    a. .RuleINVCCheckMatterInvoiceApprover1DontHaveLimitQCST.class
       .RuleINVCCheckMatterInvoiceApprover2DontHaveLimitQCST.class
4. Create Object SGNT.
5. Navigate to SGNT's Embedded Objects and create a new embedded record.
6. Create a set of 4 users, we used the following names:
    a. a, a
    b. b, b
    c. c, c

    d. background, approver
7. In Setup, update Dispute Assignee Roles to include the following.
8. Create a new Dispute add a, a : b, b : c, c : as assignee roles as per (Dispute - Assignee Roles).
9. Navigate to the Invoice / Rules tab and create a new Approval: Invoice - Approval General and save the rule.
10. Navigate to the Action tab and click on "Routes List".
11. Create a new Invoice Route per Invoice - Route General.
12. Save the Route and navigate to Stops and create stops per Invoice - Route Stops 1, Invoice - Route Stops 2, Invoice - Route Stops 3 and save the route.
13. Navigate back to the Invoice Action tab and select the route. It should appear as: Invoice - Approval Action.
    a. It is critical to select the option Approver approves once and is skipped in subsequent stops to reproduce the issue.
    b. Save the Invoice Rule.
14. Upload the attached Constants.class file to top Level / System / Custom Rules.
15. Upload the attached kranium-teamconnect-utils.jar to Top Level / System / Libraries.
16. Finally, you should have a workflow process admin super user with all rights.
    a. We named as user 1, r
    b. This will be the user executing the steps.

Steps to Reproduce

1. Log into user from the above prerequisite 16.
2. Clear logs and set Rule logger to DEBUG to capture debug statements on condition class.
3. Create an invoice pointing to pre-requisite disputes.
4. Post the invoice
5. Invoice Workflow Tab should appear as - (Invoice Record - Post - Step 1).
6. Navigate to All / Workflow Processes / In Progress and select Invoice. Use the workflow process tool to reassign the invoice to your admin user from pre-requisite 16.
7. Approve the invoice.
8. Navigate to invoice workflow, it should appear as (Invoice Record - Post - Step 2)
9. Navigate back to the workflow processes tab and reassign stop 2 to the user from pre-requisite 16.
10. This will skip stop 2 as it was previously approved per (Invoice Record - Post - Step 3)
11. Open the logs and search for all instances of:
    a. “Stop member is”.

Expected Results of Steps

When condition 2's class file "RuleINVCCheckMatterInvoiceApprover2DontHaveLimitQCST" triggers, it should be looking at user 1, r which is the current stop member.

Actual Results of Steps

Condition 2's class file instead is running the condition against user b, b - this is the user BEFORE reassignment.

Root Cause Analysis

Commits new approver to the Database before continuing computation.

Issue: Workflow - Ad hoc additional approval stops can land in custom routes when invoice is restarted.
Tracking Code: SUPPORTPRI-69317
Case Number: 2023-1116-8056126
Reported Version: TCE 6.3.7

Workaround
Users would have to delete custom routes that do not work.

Pre-Requisites

1. Custom field on invoice, boolean, default value is off.
2. Invoice object view contains a tab called TBD with category details block added (so custom fields can be accessed on front end).
3. Admin user for testing purposes as well as two additional users: UserB and UserC to use as workflow stops.
4. Two invoice approval rules:
    a. Rule 1:
        i. Qualifier: prerequisite boolean field set to 'no'.
        ii. standard route with 2 stops, current user is first stop and second stop is a second user UserB.
        iii. setting: Send for additional approval checked.
        iv. setting: "Updates to record pending approval:" set to Allowed to anyone.
    b. Rule 2:
        i. Qualifier: prerequisite boolean field set to 'yes'.
        ii. Custom route with 2 stops, current user is first stop and second stop is a third user userC.
        iii. Current user is in the workflow process manager group.

Steps to Reproduce

1. Log into application.
2. Create an invoice and post it - it should enter Rule #1.
3. As first approver, approve the invoice.
4. During the popup window, select option "Add a new approver after approval" and select current user in dropdown.
5. Navigate to the Workflow window and observe that a new stop has been added.
6. Navigate to the TBD tab and edit the invoice.
7. Navigate to the prerequisite boolean field and check it.
8. Navigate to All / Workflow Processes / In Progress.
9. Restart workflow of test invoice.
10. Navigate to the invoice workflow tab.

Expected Results of Steps
Invoice enters Workflow for Rule 2 - which has a custom route. No additional stops added.

Actual Results of Steps
The Ad-hoc stop added in the reproduction gets added to the custom route. This causes issues with custom routes. This is a defect and ad-hoc rules should not be added. This appears in the Rule logger: [DEBUG] [rule] FQAppvEngine.addAdHocStopsToNewHeader - Adding ad hoc stops back to a restarted approval header.

Root Cause Analysis
Not adding adhoc stops back if the new approval header is a different rule.

The fixes in this patch will be merged into TCE 7.2

INSTALLATION

Important: Stop your TeamConnect® instance before updating any files in the TeamConnect® war file.

1. Update WAR file

Windows GUI:
- Extract patch directory from the .zip file.
- Open the TeamConnect® .war file with 7zip
- Drag and Drop the files from patch directory to .war root in 7zip
- Overwrite file conflicts in 7zip
- Redeploy .war

Windows CMD:
- tar -xf <path_to_patch_zip>
- cd <path_to_extracted_directory>
- jar -uvf <path_to_war> .\
- Redeploy .war

Linux Terminal:
- unzip <path_to_patch_zip> -d <path_to_destination_folder>
- cd <path_to_destination_folder>
- jar -uvf <path_to_war> .\
- Redeploy .war

2. Update database and version information

Use the following steps to update the database and add patch version information to the **About** page of the **Admin Settings**.

1. Stop the TeamConnect® instance if it is currently running.
2. Backup your TeamConnect® database.
3. Run the script, located in **\update**, that is appropriate for your database server:
    - MSSQL_TeamConnect_637_PB7.sql
    - ORACLE_TeamConnect_637_PB7.sql
4. Restart TeamConnect®.

UPGRADE CONSIDERATION

No significant upgrade considerations for this patch.

LEVEL OF RISK TO UPDATE WITH PATCH

LOW