

Collaborati Spend Management 7.0 Patch 2 Release Notes

Collaborati Spend Management® 7.0 Patch 2 (PCSM7000002) resolves the following issue:

Issue: CSM > Timekeeper Contacts display an updated 'Modified On' date if Diversity details are updated in Collaborati even though CSM is not configured to allow Diversity data.

Tracking Code: SUPPORTPRI-69714

Case Number: 2024-0201-8131398

Reported Version: CSM 7.0 Patch 1

Workaround

None.

Pre-Requisites

1. The following settings must be enabled:
 - Yes Automatically authorize Collaborati timekeepers and create new contact records with Collaborati timekeeper information
 - Yes Automatically update Contact records with latest Collaborati timekeeper information.
 - Yes Timekeeper IDs are saved in contact records under: Employee ID
 - Yes Don't allow CSM to Sync timekeeper diversity data from Collaborati.
2. An active connection must exist between CSM and Collaborati.
3. An active vendor must be authorized with a few Timekeepers ready to submit invoices.

Steps to Reproduce

1. Enable the following in CSM Settings:
 - a. Automatically update Contact records with latest Collaborati timekeeper information.
 - b. Match by Timekeeper ID before creating new timekeeper contacts.
 - c. Don't allow CSM to Sync timekeeper diversity data from Collaborati.
 - d. Populate diversity data on an existing timekeeper that is already assigned to Google.
 - e. Start CSM sync with Rule and SQL Debugging enabled. Note that the vendor contact is updated (T_CONTACT and J_CONT_ADDRESS tables).
 - f. Update diversity data on an existing timekeeper that is already assigned to Google.
 - g. Start CSM sync with Rule and SQL Debugging enabled. Note that the vendor contact is updated (T_CONTACT table)
2. Log in to Collaborati as the vendor.
3. Update a Timekeeper that is authorized in CSM by populating any of the Diversity fields.
4. Run the CSM sync.
5. Check the associated Contact tied to the TK. The Modified Date is updated to current date/time.

Expected Results of Steps

The contacts must be not falsely updated since diversity data is not allowed to sync.

Actual Results of Steps

The contacts are falsely updated with an updated Modified On date.

Root Cause Analysis

Even when the contact file values were not changed, the contact record was updated (by calls to set methods).

Issue: CSM sync is not querying timekeepers for GUID assignment if the batch returned by TeamConnect is less than 50.

Tracking Code: SUPPORTPRI-69718

Case Number: 2023-1006-8011102

Reported Version: CSM 7.0

Workaround

Delete all the timekeepers with 'erroronguidassignment' set to yes.

Even if a client deletes the 50 timekeepers with an error, CSM will not attempt to populate GUIDs for all timekeepers. Eventually, they will need to delete another batch of 50 timekeepers with an error. The issue is not that there are GUID errors. This is expected due to the discrepancy between the TeamConnect refresh date and the Collaborati STAGE refresh date. The issue is that CSM does not attempt to populate GUIDs for all timekeepers at once and does not move to the next batch in case of any errors.

Pre-Requisites

- TCE 7
- CSM 7
- Active CSM-Collaborati Connection. For replication, instance is connected to test Collaborati.
- 100+ active timekeepers.
- CSM sync is completing fine but has 'Path Parameter id must not be 'null' error' from method "-getTimekeeper" as per logs. Attaching the logs.
- Create a new timekeeper and authorize it in TeamConnect. Client noticed there is no GUID for the new timekeeper.

Steps to Reproduce

1. Updated the value of "collaboratiTimekeeperID" from the timekeeper object to a random number in CSM for 50+ timekeepers. (Make sure at least one of these would fall in the first batch during the identifier sync. Save the actual "collaboratiTimekeeperID" somewhere so it can be reset later or be prepared to delete these timekeepers to avoid future sync issues).
2. Clear the existing identifiers for timekeepers.
3. In the logs, we see few timekeepers are not picked up for GUID assignment.

There is no order in which the records are fetched for each batch, it breaks if a timekeeper from the first batch fails.

Expected Results of Steps

CSM should query all the pending timekeepers if there are any timekeepers without GUID.

Actual Results of Steps

If the batch returned by TemConnect is less than 50 (looks like this happens only if the previous batch had failed timekeepers) and when there are more timekeepers that do not have a GUID, CSM would skip those remaining ones.

Root Cause Analysis

When there are guide errors, the process that is supposed to go through all the unsigned guides stopped because it didn't fetch the expected number of records.

Issue: CSM Sync > Invalid Timekeeper Updates are falsely updating Timekeeper Contacts.

Tracking Code: SUPPORTPRI-69801

Case Number: 2024-0208-8141136

Reported Version: CSM 7.0 Patch 1

Workaround

None

Pre-Requisites

SCENARIO 1:

1. Make sure there are at least 2 Offices tied to the same Firm in CSM with authorized Timekeepers.
2. There should be another Office authorized tied to a separate Firm with Timekeepers.
3. There should also be one more Office authorized without any Timekeepers with its own Firm.
4. There should be a total of at least 4 Offices as described above.
5. Once CSM is upgraded to 7.0 PATCH 1, the setting - Don't allow CSM to Sync timekeeper diversity data from Collaborati is NO.
6. Make sure the flag - 'Synchronize All Timekeeper's info from Collaborati' for all VYC\$ records is Yes.

SCENARIO 2:

1. Make sure there are at least 2 Offices tied to the same Firm in CSM with authorized Timekeepers.
2. There should be another Office authorized tied to a separate Firm with Timekeepers.
3. There should also be one more Office authorized with Timekeepers with its own Firm. This Office must then be DEACTIVATED.
4. There should be a total of at least 4 Offices as described above.
5. Once CSM is upgraded to 7.0 Patch 1, the setting. Don't allow CSM to Sync timekeeper diversity data from Collaborati is NO.
6. Make sure the flag - 'Synchronize All Timekeeper's info from Collaborati' for all VYC\$ records is Yes.

Steps to Reproduce

1. Run the CSM sync.
2. Notice the number of occurrences in the CSM logs for 'updating teamConnect timekeeper information' . This number would essentially be all the CSM Timekeepers.
3. Stop the CSM sync.
4. Now log in to Collaborati as the Firm Admin tied to the 2 Offices.
5. Update a Timekeeper that is shared by the 2 Offices.
6. Run the CSM sync.
7. CSM sync falsely updates ALL timekeeper contacts with an updated MODIFIED DATE.
8. The same results apply for both the scenarios.
9. The only specific difference in SCENARIO #2 is that the Timekeeper Contacts tied to Inactive Offices are NOT updated.

10. However, the Timekeeper Contacts tied to other Offices are also updated besides all the TK contacts tied to the 2 Offices for the same Firm. Same as SCENARIO #1.

Expected Results of Steps

CSM must not falsely update all contacts.

Actual Results of Steps

CSM falsely updates contacts for TKs that haven't been updated.

Root Cause Analysis

When CSM syncs vendors with timekeeper updates on the Collaborati side, CSM will update timekeepers if there is an inactive vendor or if there is at least one vendor with no timekeepers even for the timekeepers that have no changes.

Issue: CSM SYNC > Long Running Timekeeper synchronization due to syncTKInfoFromCollaborati flag raised in the VYC\$ records for Inactive Vendors/Vendors without Timekeepers.

Tracking Code: SUPPORTPRI-69805

Case Number: 2024-0208-8140291

Reported Version: CSM 7.0 Patch 1

Workaround

Manually disable the 'Synchronize All Timekeeper's info from Collaborati flag'.

Pre-Requisites

SCENARIO 1:

1. Make sure there are at least 2 Offices tied to the same Firm in CSM with authorized Timekeepers.
2. There should be another Office authorized tied to a separate Firm with Timekeepers.
3. There should also be one more Office authorized without any Timekeepers with its own Firm.
4. There should be a total of at least 4 Offices as described above.
5. Once CSM is upgraded to 7.0 PATCH 1, the setting - Don't allow CSM to Sync timekeeper diversity data from Collaborati is NO.
6. Make sure the flag - 'Synchronize All Timekeeper's info from Collaborati' for all VYC\$ records is Yes.

SCENARIO 2:

1. Make sure there are at least 2 Offices tied to the same Firm in CSM with authorized Timekeepers.
2. There should be another Office authorized tied to a separate Firm with Timekeepers.
3. There should also be one more Office authorized with Timekeepers with its own Firm. This Office must then be DEACTIVATED.
4. There should be a total of at least 4 Offices as described above.
5. Once CSM is upgraded to 7.0 Patch 1, the setting. Don't allow CSM to Sync timekeeper diversity data from Collaborati is NO.
6. Make sure the flag - 'Synchronize All Timekeeper's info from Collaborati' for all VYC\$ records is Yes.

Steps to Reproduce

1. Run the CSM sync.

2. Notice the number of occurrences in the CSM logs for 'updating teamConnect timekeeper information' . This number would essentially be all the CSM Timekeepers.
3. Stop the CSM sync.
4. Now log in to Collaborati as the Firm Admin tied to the 2 Offices.
5. Update a Timekeeper that the 2 Offices share.
6. Run the CSM sync.
7. CSM sync falsely updates ALL timekeeper contacts with an updated MODIFIED DATE.
8. The same results apply for both scenarios.
9. The only specific difference in SCENARIO #2 is that the Timekeeper Contacts tied to Inactive Offices are NOT updated.
10. However, the Timekeeper Contacts tied to other Offices are also updated besides all the TK contacts tied to the 2 Offices for the same Firm. Same as SCENARIO #1.

Expected Results of Steps

The flag - syncTKInfoFromCollaborati / Synchronize All Timekeeper's info from Collaborati must be disabled after the initial sync for all vendors that do not have Timekeepers or Inactive Vendors.

Actual Results of Steps

CSM processes all Timekeepers across Vendors increasing the sync times for Timekeeper synchronization.

Root Cause Analysis

When CSM syncs vendors with timekeeper updates on the Collaborati side, CSM will synchronize and update the timekeepers if there is an inactive vendor or if there is at least one vendor with no timekeepers.

Issue: Unexpected vendor deactivation.

Tracking Code: SUPPORTPRI-69809

Case Number: None

Reported Version: Collaborati 4.9

Workaround

None.

Pre-Requisites

Vendor is using TeamConnect version 4.

Steps to Reproduce

- Vendor is deactivated in Collaborati.
- Vendor was not deactivated in TeamConnect.
- Timekeepers are also Unauthorized in Collaborati and TeamConnect (previously had been authorized).
- There are over 8000 timekeepers that need to be remapped in TeamConnect.

Expected Results of Steps

Vendor stays activated in Collaborati unless Vendor is purposely deactivated in TeamConnect.

Actual Results of Steps

Vendor is deactivated in Collaborati Timekeepers are Unauthorized in Collaborati.

Root Cause Analysis

When an error occurs when CSM is trying to activate a vendor, it will assume the vendor is invalid and deactivate it.

The fixes in this patch will be merged into CSM 7.2

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 7.0 Patch 2.
 - 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