

Saratoga CRM 6.7.3

Release Notes

These Release Notes describe new features and important release information in Saratoga CRM 6.7.3. Issues resolved in Saratoga CRM 6.7.3 as well as known issues are listed.

What's New

The following enhancements are provided with Saratoga CRM 6.7.3:

- **Support for Web servers in Intermediate Database (IDB) deployments**

Distributed Web servers can now write changes to the `changes.dat` file.

Saratoga Thin Client now writes changes to the `changes.dat` file. Saratoga Thin Client URLs can now point to an Intermediate database.
- **Support for Citrix deployments**

With Saratoga CRM 6.7.3, it is possible to install Saratoga CRM in Citrix environments.

Saratoga Thin Client is not supported in Citrix environments.
- **Separate installation of e-mail integration components**

With Saratoga CRM 6.7.3, add-ins for Microsoft Outlook and Lotus Notes e-mail integration can be installed manually if required, after installing Saratoga CRM. The add-in installation MSI files are provided on the Saratoga CRM 6.7.3 installation CD-ROM. For information about installing the add-ins, see the section **Installing Add-ins for E-mail Integration** on page 3 of this document.
- **Processing of complete extract in Intermediate Database deployments**

To prevent loss of report data created by Thin Client users at an IDB the `SSISYSTEMOBJECT` table is not rebuilt on processing a complete extract at an IDB.
- **Merge Siblings behavior restored**

In Saratoga Thin Client, reports containing data from two or more sibling tables now display data in a manner similar to the default Merge Siblings behavior in Saratoga CRM, with the siblings on the same line.
- **Compatibility**

Saratoga CRM now supports the following:

 - Microsoft Windows 7 (for either 32-bit or 64-bit systems)
 - Microsoft SQL Server Express 2005 Service Pack 3
 - Lotus Notes 8.5
 - Apresta for BlackBerry supports the BlackBerry device operating system v4.6

For more compatibility information, see the *Saratoga CRM 6.7.3 Environment and Configuration Guide*.

Important Notices!

Language Support

Saratoga CRM 6.7.3 is available in English, Japanese, Chinese (Simplified), French, German, Italian, Portuguese, Spanish, and Swedish.

Note: Language support is not certified for the Form Center, Apresta for BlackBerry and Apresta One Saratoga CRM 6.7.3 components.
In Japanese and Chinese versions of Saratoga CRM 6.7.3, the Microsoft Word add-ins for both Saratoga CRM and Saratoga Thin Client are available only in English.

New Configurations in the web.config File

New configuration options have been made available in the `web.config` file. Ensure that you back up your existing `web.config` file *before* you install. Each time you install Saratoga Thin Client, Apresta, or Form Center, the corresponding `web.config` file is overwritten. After installing 6.7.3, ensure that you update the new `web.config` file with the setting values from the backed up version.

For a complete list of configuration options in the `web.config` file, see *Chapter 4, Saratoga Configuration Settings*, in the *Saratoga CRM 6.7.3 System Manager's Guide Vol 1*.

Word Integration

It is possible that Windows users may see multiple integration menus in Microsoft Word due to changes made to the various DLLs used for the integration between Saratoga CRM and Microsoft Word. The possible menu names are iAvenue (6.5.x version), Saratoga (6.6.x version) and Saratoga CRM (6.7 and later versions). It is recommended that the old menus be removed, leaving only the Saratoga CRM menu.

To remove additional menus, do as follows:

1. Close Microsoft Word if it is open.
2. Locate the `iAveWordAddin.dll` file.
3. Verify the properties of the `iAveWordAddin.dll` file. The new version 6.7.3 DLL has the following properties:
 - Product Name : Saratoga CRM
 - Product Version : 6.07.3043
4. If the version number of the `iAveWordAddin.dll` file is the same as mentioned in Step 3, start Microsoft Word. If multiple menus for Saratoga are still displayed on the menu bar, reset the menus as follows:
 - a. Click **Tools** and then click **Customize**.
 - b. On the **Toolbars** tab, highlight **Menu Bar**, and click the **Reset** button.
 - c. Click **OK** when you are prompted to reset the menu using `Normal.dot`.
All Saratoga menus are erased.
 - d. Close and then reopen Microsoft Word.
If the new `iAveWordAddin.dll` is correctly registered, a single menu called Saratoga CRM is displayed.
5. If the version number of the `iAveWordAddin.dll` file is different from the one mentioned in Step 3, or if no Saratoga menus are displayed, install or reinstall version 6.7.3.

UsrAdmin and DBAdmin are no Longer Exclusive Use Utilities

The conversion of `user.dat` into a database table in version 6.6.0 has removed the exclusive use restriction on the UsrAdmin and DBAdmin utilities. Multiple users can be simultaneously signed in to all utilities now. Schema Wizard still prohibits multiple users from opening the same dbd file, but multiple users working with different dbd files is permitted.

Thin Client Installation on Vista Systems

Saratoga Thin Client can be accessed using Windows Vista. However, it is recommended that Windows 2003 or Windows 2008 be used as a Web Server for Thin Client. Using Windows Vista as a Web Server is not supported.

While installing add-ins from Thin Client or running Saratoga CRM utilities on Vista systems, the following error message may be encountered:

The installer has encountered an unexpected error installing this package. This may indicate a problem with this package. The error code is 2869.

If you encounter the error message shown above, ensure that you do the following:

1. Browse to `C:\WINDOWS\system32`.
2. Right-click `cmd.exe` and select **Run as administrator**.
3. Do one of the following:
 - Type `msiexec /i <setupname>.msi` where `<setupname>` is the path to the folder where the `.msi` files are located.
 - Turn off the User Account Control feature from User Accounts in Vista.

Dumping Data from a BLOB/Document Field

You can only use the Dump Data feature in DBAdmin to dump data from a record containing a BLOB/Document field. The Query Tool does not dump data from a BLOB/Document field.

Installing Add-ins for E-mail Integration

The Saratoga CRM installation program does not automatically install requisite add-ins for e-mail integration with Lotus Notes or Microsoft Outlook. If you require the e-mail integration features to be available, ensure that you install the required add-ins after installing Saratoga CRM.

The table below lists the available add-ins, their location on the installation CD-ROM and the folders created within the Saratoga installation folder when they are installed:

To install	Double-click	File Location on Saratoga CRM installation CD-ROM	Folders created within the Saratoga CRM installation folders
Saratoga CRM Outlook Add-in	<code>SaratogaCrmOutlookAddin.msi</code>	Outlook Addin folder on the Saratoga CRM CD-ROM	Creates the Saratoga CRM Outlook Addin folder
Saratoga CRM Lotus Notes Add-in	<code>SaratogaCrmLotusAddin.msi</code>	Lotus Addin folder on the Saratoga CRM CD-ROM	Creates the Saratoga CRM Lotus Addin folder

Note: Both Saratoga CRM Windows and Saratoga Thin Client users require administrator permissions to install the e-mail integration add-ins.

Databases Not Tested with this Release

The following databases were not tested for this release:

- Microsoft SQL Server 2000 Service Pack 4
- Oracle 9.2.0
- Oracle 9i 9.2.0 PE
- Oracle 8.1.6
- Oracle 8.1.7
- Oracle 9.0.1
- Oracle 9i PE, ver 9.0.1
- Oracle 8i PE, ver 8.1.6
- Oracle 8i PE 8.1.7
- DB2 UDB 5.1
- DB2 UDB 6.1
- DB2 UDB 7.2
- DB2 UDB 8.1
- DB2 UDB 8.0
- DB2 UDB 8.2

Issues Addressed

The following issues were addressed and resolved in Saratoga CRM 6.7.3, organized component-wise:

Installation

ID	Notes
B78P5116D	Resolved issue where complete path names were not displayed when the Install path selected by clicking Browse.

Saratoga CRM

ID	Notes
B75M4EKBK	Resolved issue where literal values in a validated list caused a General Protection Fault (GPF) in the DBRecalc function.
B7AM2ERT3	Resolved issue where all view field data disappeared from display when the Dataview was refreshed.
B73V58EUU	Resolved issue where an earlier version of Chart Wizard was installed, and therefore an editing feature was missing.
B75D32BHT	Resolved issue where, on specifying an invalid date, no warning message was displayed and the record was saved with the invalid date.
B783D9CA4	Resolved issue where opening detail tab that contained a Join field took more than 38 seconds due to running queries for fetching data.

ID	Notes
B6Z745U9W	Resolved issue where the Microsoft Outlook interface used only a single session on Citrix.
B792EOH4E	Resolved issue where the SSISYSTEMOBJECT table in an Intermediate Database deployment was rebuilt completely when a complete extract was processed.
B7AV4IHZG	Resolved issue with date display dialogs in Quick Search, Query Tool and MCC for the French and German versions.
B6TF1XUWW	Resolved issue where a Schema Validation error was experienced with the following message: Schema Validation error: E-Intelligent forecaster definition: Invalid ID Column "OBJECT_TYPE"
B79O2DAVQ	Resolved issue where the SET_MOBILE_OFF setting did not work as expected.
B79G35DN0	Resolved issue where Update Center allowed only 8-character passwords, unlike other utilities which allowed longer passwords.
B7CK2I5KG	Resolved issue where an Invalid Expiration Date message was displayed when processing a .dwn file that contained multiple extracts.
B7CX4YW91	Resolved issue where a Join column always selected the wrong item when users selected the check box.
B7J83HJV9	Resolved issue where outgoing e-mail in Lotus Notes did not carry values from Saratoga CRM to Lotus Notes.

Saratoga Thin Client

ID	Notes
B78833FH6	Resolved issue where a change was needed in the documentation for the CHANGE <ALL> SET_IF function.
B7B1AD2AM	Resolved issue where the Allow change rule did not work as expected in Report Edit mode, and users were able to modify the field content.
B78O2U1R1	Resolved issue where multiple parent records were deleted when users deleted only a single parent.
B77ZA49VY	Resolved issue where a Thin Client session terminated with the following error message: The UserContext object is null.
B7B640FYS	Resolved issue where Allow Rules did not fire immediately unless users closed and reopened the record.
B79P3YS3T	Resolved issue where the following error message was displayed when using the Query Tool in edit mode in Thin Client: The following error occurred at line x: "Object reference not set to an instance of an object"
B6W52MF34	Resolved issue where, unlike Saratoga CRM behavior, when Reject was fired for a YES/NO column, the checkbox was not reset as cleared.

ID	Notes
B77O37FES	Resolved issue where the Send Email Button Control in Screen Wizard did not work.
B75249C5W	Resolved issue where the Yes/No and String fields with Lists that are Meta fields were disabled in Thin Client.
B7BO4XWO6	Resolved issue where the @TIMESTAMP function was displayed as an alphanumeric value in Thin Client.
B7ALSL29O	Resolved issue where a correction was required to be made on the Thin Client welcome page.
B79O4BIPW	Resolved issue where conditional tabs did not work in Saratoga Thin Client.
B75V43GUU	Resolved issue where the Close all tabs check box option was not translated.
B74Z6Y9EF	Resolved issue where Lotus Notes integration for Saratoga Thin Client did not prompt for the location of the Notes.ini file, if the file was not found at the default location.
B71Q4KFJ2	Resolved issue where changes to <code>userid.wsp</code> were not saved on exiting <code>Saratoga.exe</code> .
B7190POWM	Resolved issue in Outlook Integration where changing the target system before searching for a record led to an unhandled exception.
B7HR0RAI7	Resolved issue where the detail page context was lost after a page was deleted by a user with insufficient delete permissions.
B7HQ8967I	Resolved issue where it was not possible to select a record from a result set of a Join function when the Join column contained an apostrophe (').
B7HQ8U1XO	Resolved issue where Allow rules on TIME columns were not dynamic and were only available after the Dataview was refreshed.
B7HQ7DWKP	Resolved issue where, under certain circumstances, users were able to key in data in protected columns.
B7CK4Q6OO	Resolved issue where an <code>init</code> rule with @NOW always returned zero (0)
B7JR65F6I	Resolved issue where the many-to-many function did not work as expected in Saratoga Thin Client.
B7J83HJV9	Resolved issue where outgoing e-mail in Lotus Notes did not carry values from Saratoga CRM to Lotus Notes.
B7JD52K6U	Resolved issue where Integer column types did not work correctly with Update rules, and the values were always set to 0.

Apresta and Apresta One

ID	Notes
B7864MX93	Resolved issue where the Query Tool Criteria Match is Optional setting did not work as expected in Apresta and Apresta One.
B75E2AQMC	Resolved issue where, in UAdmin, the last platform displayed Thin instead of Wireless for Apresta logons.
B750RMANA	Resolved issue where the Repair/Upgrade option did not work for Apresta and Apresta One.
B7BX5COMC	Resolved issue where a TIME field with an INIT Rule and a simple formula (INIT @NOW+<x>) shows an incorrect result.

Known Issues

The following table describes the known issues for Saratoga CRM 6.7.3, organized component-wise:

Installation

ID	Notes
B7563Z4ZW	Installation of Saratoga Thin Client fails on systems where there is an existing installation of Form Center 6.7.

Saratoga CRM

ID	Notes
B76G4S5R3	Add/Delete Records are not logged in USERID.DET during upload
B7C5P8C0N	Mail archival from Saratoga CRM or Saratoga Thin Client to Microsoft Outlook or Lotus Notes does not populate the BCC field.
B7CB2YJA8	The MARGIN bar in deluxe RTF field does not create a line break. Subsequently, users are able to write past the margins.
B7973061D	The Send to Excel option also appends the hyperlinks to the Excel worksheet.
B7AN4XWNQ	The non-breaking space in Query Tool criteria is ignored.
B7664FTT1	It is not possible to attach a document whose file name is longer than the document name column.
B78V4GPI5	'Hide Records without warning' displays the number of records retrieved but no records are displayed in the query results.
B78X2YONA	The @MODIFIED_COLUMN function does not work on new records, or on records for which data has been reverted to previous values.
B78N4EPCE	German characters are replaced with the '?' character.
B77U4S728	Query Tool results show different results in the Menu bar from what is actually listed.

ID	Notes
B78X3Z5XW	SchmWiz SQL Statement does not display a message when pasting a statement that exceeds its maximum number of records.
B7BP4U3ZY	In UAdmin, adding users through batch processing using an invalid user type fails and the requisite users are not added.
B7COP7C2H	The Allow rule function does not work when the condition contains @count(tablename).
B7BX477VT	64-bit ODBC DSNs are not supported with Saratoga CRM 6.7.3 on a 64-bit server. 32-bit DSNs must be defined.
B7AO35V0R	The Word Addin has not been converted for use in Citrix as Outlook and Lotus Notes have been converted.
B7B50IEY4	Document-type attachments that have been archived to an IDB and uploaded to CDB cannot be opened in Saratoga CRM Windows CDB. To temporarily resolve this problem, remove the first '0' and 'B' record entries above the specific record which has an attachment in the *.C01 file, and then run the Upload again.
B7BU3OO3W	In Form Wizard, list grid data is not displayed in the same order as in the Dataview.
B7D73Y2XJ	Logging on to Saratoga CRM creates an empty transaction in changes.dat.
B7D45DS05	UAdmin allows up to 32 characters for the user password, but Update Center and Schema Wizard do not.
B7ID2X264	In Italian RDB installations, some installation messages have not been translated into Italian.
B7ID39LLF	For some languages, other than Chinese and Japanese, the captions for strings in Chart Wizard labels and buttons are too long and are truncated in display.
B7ID3H5T6	In Italian RDB installations, the 15116E download message is not translated into Italian.
B7ID3RI0T	In RDB installations, the View inbox, new email, view contacts, new contact, view appointment, new appointment, view tasks, and new tasks options do not work as expected.

Saratoga Thin Client

ID	Notes
B78O4H176	When the Not Blank Criteria is set, both blank and non-blank results are returned.
B79T3BDQ7	There is a discrepancy in new record initialization values between Saratoga CRM and Saratoga Thin Client.
B799H9M7U	Lists with comment lines that begin with asterisks are rejected in Thin Client.
B7BG56M33	Filtered lists do not work in grid lists in Edit mode.
B7C63KSQR	Thin Client users encounter the following error on opening records in some cases: TC Server Error - The added or subtracted value results in an unrepresentable datetime - parameter name: value

ID	Notes
B7AVEA5IK	Thin Client fails to send email addresses to BCC when 324 or more addresses are selected.
B75K4GG57	The Thin Client logoff/Help/user settings disappear when users edit a dashboard.
B77P39WUQ	The 'Hide records with no warning' option does not work in Global Search results.
B78V3LBSCS	RTF fields cause a 'blue field' to be displayed when navigating between two open sites.
B7AU4TPUZ	When a field requires a value, Saratoga Thin Client displays the field name and not the alias name like Windows does.
B7C44JHGX	On adding a new Competitor record with the 'edit in place' list grid option, the Reject rule and Validate option are ignored.
B7CK4Q6OO	An init rule with @NOW always returns zero (0).
B7CX3GE1E	In Thin Client, Query Tool ignores output the width settings for any columns.
B7D04BB66	Thin Client does not display RTF data in reports in the same way that Saratoga CRM does. In Thin Client reports, RTF data is displayed on a single line, adversely affecting readability for users.
B7COD0CA4	Thin Client cross-validated lists pointing to multi-fill list do not fill multi-fill columns as required.
B7D73Y2XJ	Logging on to Saratoga CRM creates an empty transaction in changes.dat.

Form Center

ID	Notes
B7BO3HDJJ	When displaying the form from a Dataview, the read security is ignored.
B7D44JCWD	Dates are always displayed in US format (mmddyyyy).

Apresta and Apresta One

ID	Notes
B7B94PZTI (Apresta)	Some of the advanced criteria options do not work.
B76V5EE5S (Apresta)	Fields with USELIST do not display the arrow for selecting values.
B7CY49S3Q (Apresta)	Fields that have a cross-validated list and reference a second cross-validated list display the names of the second list instead of the list values when the drop-down arrow is clicked.

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