

GoldMine Enterprise Edition (GMEE)

Version 6.3.0

Release Notes

Updated October 30, 2009

What's Enhanced in GMEE 6.3.0

The GMEE Outlook integration now enables users to use the standard Outlook buttons to link e-mail and activities to GMEE, rather than previously used custom buttons (such as "Save and Track"). To link items to GMEE, confirm that the Regarding field is populated before clicking a commit button from an Outlook window.

The following features have been implemented in GMEE 6.3.0:

Feature #	Feature
104472	Ability to configure the "Go to" buttons to open an object in the current window, rather than in a pop up window
103548/ 106939	Ability to disable the "Export to Excel" functionality
103364	Ability to execute a QuickAction directly from a dashboard view
103363	Need feature to allow QuickActions to run for selection of records in the dashboard grid.
103354	Ability to copy a label control with required field indicator
103338	Tool for converting Standard business objects to Master business objects
100075	Personalized grid views are retained after logging out
99365	Ability to use a saved search in the Search and Link dialog box
99279	Ability to deactivate the "unlink" button in an associated item selector
98955	Automatically link E-mail to Contact after clicking icon on E-mail tab of Contact record
98489	Support complex logic for creating a campaign segment
96868	Support for SQL Server 2008
96838	Ability to prompt for an e-mail template within QuickAction
96456	Windows Server 2008 support
78774/ 78775	Ability to delete an existing value in a drop-down list
78511	Ability to handle blank email addresses when using the Run for Group option in a QuickAction
68934	Ability to edit master objects when displayed in a tab

What's Fixed in GMEE 6.3.0

The following issues are fixed in GMEE 6.3.0:

Issue #	Title
109521	When committing the Definition Set that has a constraint using a Functional date, an error occurs
109206	Search based on a date field with search criteria of date only does not return the correct query results
107428	Duplicate emails link to record as Inbound and Outbound using Outlook integration.
107391	HTML format emails that contain images, e.g., embedded signature .JPG, will get imported into the GMEE database and all text will be converted to lower case
107387	When using BPML to run the ExecuteQuickAction method in FusionBOWS, the response object always returns False
107239	Unclear error message returned using Outlook Integration
106864	Merging Account records doesn't merge linked contacts
106680	Parameters configured to be passed to a Crystal Report are not passed consistently, making the report function incorrectly
106023	Online help for Outlook integration includes extraneous comments
105540	Unable to send e mail or create appointments or meeting form GMEE to Lotus Notes Client on a Citrix environment
104876	Outlook integration controls interrupt navigation to Opportunity workspace in web client
104686	Client help files are not displayed when client is installed on a drive other than C:\
104640	Conditional Visibility Issues on fields within a tab
104564	Currency conversion from TCV to PCV only works when application server locale is United States
104250	Disconnected GMEE Vista clients cannot validate local specified license file
104083	No error message is displayed when attempting to save attachment to unavailable file server
103861	Business Process Engine does not properly handle web service responses with header elements
103783	Error when changing the display name of a Master Business Object created from an external table
103545	Custom tab record fields have text when there is nothing in those fields for the main record
102993	Extraneous spaces added to file path copied from one Write To File QuickAction to another
102938	Send E-mail QuickAction does not support embedded images
102852	Unable to see the FrontRange tool bar in Lotus Notes Client
102735	Security option needed to disable 'global' print capability, while maintaining single account print capability for owner
102732	Security option needed to disable 'Export to Excel' functionality in GMEE
102729	Sample XML file for GMEE does not import with out of the box FAD
102292	Send or update a task item QuickAction is passing dates in US date format
102105	Modifications made in the preview are not tracked in the application when using QuickAction to send item through Lotus Notes
101797	Default value is ignored for prompted search
101169	Link labels (Primary email, Phone number) are not displaying correctly on Vista
101044	Office documents as attachments can take over 30 seconds to attach or open

100957	Error when generating forecast using Oracle database
100956	Trigger using ContactAssociatesActivity relationship does not fire
100939	Copying a chart dashboard part and modifying it also changes the original dashboard part
100929	Role-based dashboard is not shown in the Navigator
100925	Pipeline chart uses default date range even if a different range is selected at runtime
100865	Creating an Appointment or Meeting in Lotus Notes does not create a record in GMEE
100830	Cursor state is lost when a user toggles to another application and back to GMEE
100822	Outlook Add-In installation fails on Windows XP with Outlook 2007
100078	When new column is added, all previously hidden/removed default columns are reinstated
100072	When creating a new account, the web site of previous account is displayed until refreshing
99941	Custom configuration causes Products/Services to get removed from Opportunity when quote is saved after a previous quote was approved
99890	Forecast Dashboard not rendering properly for non-US locale
99688	Changed grid views are not showing up with translated perspective
99546	Cannot use a button added to a form that was configured to execute a Save command
99411	Notes Address Book doesn't sort hyphens properly
99409	Slow performance when loading records from Notes Address Book
99408	Lotus Notes Add-In: Uninstall does not remove all installed files
99406	Address Filters don't work for Notes Address Book
99405	Calendar "notify me" option should be enabled by default for Lotus Notes
99404	Add address to the "To" field in the address book it stays until you remove it via Delete
99402	The Personal Address Book works properly as long as you don't have people with blank email fields
99355	Run for Child Records Quick Action when a Master object is related to itself via an embedded relationship
99004	Performance issues when using address book with Lotus Notes Integration
98960	When a new email is linked to a Contact using 'Save and Track' in Add-in before sending the email to the receiver, the Outlook email message window is closed and the email is saved in the Drafts folder of Outlook
98651	Contact icon grayed out
98578	Funnel Chart displaying 'Closed Won' twice in the 'Opportunities By Stage' dashboard part
98573	Outlook Integration causes the root of c:\ to be used as temp location for email attachments
98517	The disabling of the green arrow click through (associated item selector) when a field is read only
98516	Attempting to delete manually enter, if the user tabs away the data re-appears
98513	Application is dropping of the first digit of the date when manually entering a date (vs. using pop-up calendar).
98419	LDAP enabling button is missing in the authentication Settings
98246	Tabbed dashboard part grid changes do not persist
97527	Clicking from row to row within a search results set takes approximately 2 seconds
97525	Drill down option from Funnel chart does not return data.

97517	Adding large volume of contacts into a new 'Contact Segment' takes over a second per contact.
97324	Go To Drop down in tabbed part works only for grid view
97113	Cannot configure the objects shown in Outlook Link/Unlink dialog unless FRSDefaultSearch is updated
97104	QuickAction calls to methods do not provide access to method's return value as documented
97066	Column filters on Contact tab on custom object causes contact names to clear when changed
97057	Subscription grid blanks out when selecting filter and is then disabled until refreshed
97024	Custom object data is not visible once filter is applied, based on specific configuration
97021	Linked Calendar Items options configured in Outlook do not work
97014	Cannot update Public Calendar
96959	Error message "Invoke or Beinginvoke cannot be called on a control until the window handled has been created." when saving linked custom object in specific configuration
96650	Unable to disable "Connect at Startup" option in Outlook Add-In
96459	Specific custom object causes application to hang when saving an edit
96141	"System Cannot find the File Specified" message when launching GMEE from Lotus Notes
95920	Unable to get the Ordered List of Records(Data) in a Mail Merge QuickAction.
95862	Incorrect version number displayed in Help > About when using ClickOnce deployment
95663	Attempting to edit any 'Top X' Runtime option on a 'MultiView Grid' Dashboard part included Out-Of-The-Box, results in an error
95488	When doing a search on the Navigator, for Contact.LastName, then selecting a contact record, and selecting the VCR back button the application hangs, and inconsistently closes out.
95111	Field columns added to grid disappear after using back arrow
94947	When a Contact grid has a relationship with the Account, the count of results of search returned on Contact.LastName are inconsistent
94945	When a Contact grid has a relationship with the Account, the list of Accounts when you sort on Contact data is inconsistent
93901	Master Business Object with name different than the External Table it accesses gets invalid object error on save record
93854	The tab Grid quits working if a filter is set on the fields City and Phone
93686	Send Or Update Calendar Item QuickAction not functioning as expected
93437	Save and Track button links open message to GMEE, not the selected message
83170	When perspective is applied to dashboard part, the dashboard part still appears the same as in the base perspective.
82751	'The criteria is invalid' returned when creating a search with date/time prompt
82639	When adding a link field, the embedded relationship section of the field wizard does not display the full relationship name
78883	When creating an Organizational Chart with a non-associated category, and scrolling down the chart by clicking on the scroll bar GMEE will result in an application failure
78786	Changes are not retained when deselecting objects in the Email/Calendar settings
77902	When performing a manual merge, child records are only copied to the master record if they have a Contains relationship to the parent object

77832	The option for Simple Value is missing in the right value when setting up an Advanced constraint.
77828	License Manager from the Windows program menu is only available to the user who installed it
77827	Outlook Add-In: Misleading System warning that Office 2003 is not installed and therefore the PIA for Office 2003 fails when System has Office 2007
77774	Dashboard Part with any Chart control will not work if Business Unit Security enabled on Group Member Business Object
77621	The Word mail merge quick action is not fetching the records from the FRS search if we have more than one relationship to the same object
77616	Cannot set the dashboard 'Corporate User PC Dashboard' as a default dashboard for any workspace
77476	The word Successful is spelled incorrectly in the BPSETTINGSUTILITY.exe Test Connection dialog.
77017	Personal Dashboards that have been placed on the Navigator are non-functional
76579	The word 'separator' is misspelled on the Field Parser Parameter dialog window
76567	Error when using spell check with a remote 3 tier connection
76076	Duplicate searches with same search name can be created by using 'Copy Search' and dragging the newly created search to the personal area
75783	Prompt space diminished when a search is run if the search is built based on prompts having more than 4 prompts input parameters
75596	The "Push" of the relationship does not push the related fields
75592	Cannot delete a "Push" in the relationship
75556	After modifying the grid, columns must be de- and re-selected before changes are visible
74885	Search created using a user prompt for date and the date only modifier still requires the time
74576	Edits to grids not appearing on the dashboards after committing definition set
74312	Exception when generating quote with null fields
68100	When using the GME Smart Client thru ClickOnce, there is a 10 second delay when moving between opportunities in the grid view
67517	Extraneous option available using the "Custom" install option for client
67498	FAD file is installed through client installation, rather than application server installation

Installation instructions

Before installing GME 6.3.0, backup your current database. Open the Administrator online help (<C:\Program Files\FrontRange Solutions\FRSApplication\ORAdminWebHelp\ORAdmin.htm>) and view the section "Exporting data to a FAD file" for detailed instructions.

1. We highly recommend that customers take an image of current Application Server.

Note: If you experience any unexpected interruptions or unexpected behavior during the install or upgrade process, we recommend that you restore the original image on the application server. In the event that the original image is restored, client machines must also be uninstalled and reinstalled with the previous version.
2. Backup your existing installation (install directory and database). Copy the Web.Config files from each of these locations:

- C:\Program Files\FrontRange Solutions\FRSApplication\ServiceManagement\
 - C:\Program Files\FrontRange Solutions\FRSApplication\ServiceManagementWeb\
 - C:\Program Files\FrontRange Solutions\FRSApplication\ServiceManagementCrystalReportViewers\
 - C:\Program Files\FrontRange Solutions\FRSApplication\FusionBOWS
 - C:\Program Files\FrontRange Solutions\FRSApplication\FusionNotification
3. Stop the FSMT service.
 4. Stop the FrontRange Scheduler service.
 5. Stop the Business Process Engine (BPE) as follows:
 - Make sure there is no activity in the AppServer (w3wp.exe). This can be ensured by watching the CPU consumed by the AppServer process in the Windows task manager or performance monitor.
 - Make sure BPE is not active. One of the ways to find this is to watch the BP Service log if the 'debug' is turned on or watch the CPU in the task manager.
 - Stop the application pool for the application server in IIS.
 - Go to Administrative Tools>>Internet Information Services Manager>>Application Pools.
 - Right-click on Application pool for the application server and select *Stop*.
 - Make sure the BP Engine MSMQ is empty (0). In case it is not empty and if the queue size is decreasing, then wait until it becomes zero. If it does not decrease, then it means that the BP Engine is not processing the MSMQ for some reason, in which case it is ok to go the next step.
 - Stop the application pool used by GMEE or IIS completely, depending on your setup.
 - Stop the BP Engine from Windows Services.
 - Optional steps:
 - Backup the BPE database.
 - Backup the MSMQ directory.
 - Backup the BPE log files.
 - (Optional) Database holding the BPE persistent tables and the database holding GMEE tables can be taken offline only after shutting down the App Server, Web Services and the BP Engine.
 6. Prior to installation, close all active GMEE clients.
 7. Stop the FrontRange License Authentication Server.
 8. Launch the GMEEServer.exe installation file to install on the application server or Web server (if different). Accept the default settings when prompted.
 9. Launch the Upgrade Wizard from the Windows start menu (Start > All Programs > FrontRange Solutions > GMEE > Upgrade Wizard). Accept the default settings when prompted and complete the upgrade wizard.
 10. Import GMEE63IssueFixes.FUD. In the FrontRange Administrator, go to Database > Upgrade and import the FUD file, which is located in the same directory as the FAD files (C:\Program Files\FrontRange Solutions\FRSApplication\GMEE\Fad)
 11. Review and apply the changes listed in this document: GMEE 6.3 Content Upgrade Instructions.doc, installed in C:\Program Files\FrontRange Solutions\FRSApplication\GMEE\Fad

- The document includes 6 changes to application settings, which are applied within the FrontRange Administrator.
 - The document also describes 18 changes to the application definition. 10 of these changes are automatically applied by importing GME63IssueFixes.FUD, and are mentioned in the document for reference. The remaining 8 changes are indicated in document with the following notation: "Manual Changes: Yes". These 8 changes must be applied manually as described in the document.
12. Reset IIS (IISReset).
 13. Start application pool for the application server in IIS.
 14. Start FrontRange License Authentication Server.
 15. Start FrontRange Solutions Scheduler Service (if used).
 16. Start FSMT Service (if used).
 17. Start the BP Engine:
 - Make sure the Database Server for GME6 and the BP Engine are running.
 - Make sure the Mail Server is up and running.
 - If the App Server is not already up and running, restart the App Server.
 - Start the Web services – FusionBOWS and FusionNotification.
 - Clear or backup BPE debug and error logs.
 - Start the BPE from the Windows Services.
 - Make sure MSMQ is running.
 18. Client machines can be upgraded through the ClickOnce installer or by running GME6Client.exe to install manually.
 19. There are separate installers for integration with Outlook 2003 and Outlook 2007. Run the appropriate installer for the version of Outlook used on the client.

IMPORTANT: After the installation, all the FrontRange services and IIS must be restarted in order to update the application. However, it is not necessary to restart the operating systems.

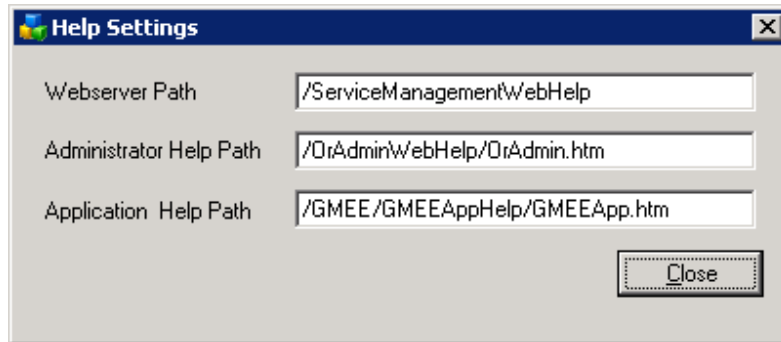
Help Path Update:

In order for the GME6 help files to be loaded properly in the 6.3 Foundation, the help path setting needs to be updated as described below:

1. Launch the Admin tool.
2. From the Home screen, click on the "System Settings" link.
3. From the Settings screen, click on the "Help Settings" link.
4. In the Help Settings dialog, update the existing settings to reflect the following paths:

Webserver path: /ServiceManagementWebHelp
 Administrator Help Path: /OrAdminWebHelp/OrAdmin.htm
 Application Help Path: /GME6/GME6AppHelp/GME6App.htm

At this point, the Help Settings dialog box should appear as follows:



Click the "Close" button, and exit from the Admin tool, to complete this change.

This change is also included in GME 6.3 Content Upgrade Instructions.doc, and repeated here for emphasis.

Special Notes:

GME clients and server must be on the same version and patches. The application will not work correctly if clients and servers are on different versions.

- **For Auto Deploy clients:**

The following folder must be deleted on each client PC using Auto Deploy.

C:\Documents and Settings\Users Name on Domain\Local Settings\Apps\2.0

- **Customers performing Complete Installs:**

If you are doing a complete install please note that License Manager "server name" defaults to localhost; this should be changed to your actual server name in the FRS Administrator.

Known issues:

Issue	Title	Work-Around
93089	Account information is not displayed when adding a new contact.	<p>In this case the new Contact is being created using the Support View. There are two ways to resolve this.</p> <ol style="list-style-type: none"> 1. Set the Contact editing to occur in the tab region: <ol style="list-style-type: none"> 1. Launch the Service Management Administrator 2. Select -> Definition Set ->New Definition Set 3. In the Tree Control Select the Account Business Object 4. Select Displays, double click on "Account(Layout)" 5. In the right hand panel right click on the "Contact" tab and select "Tab Container Properties" 6. In the dialog that appears select the "Layout" tab 7. In the pull down list titled "Create New Object in" select "TabRegion" followed by the "Close" button 8. Commit the definition set

Issue	Title	Work-Around
103854	UNC path does not work in HTML & URL enabled fields if security credentials are required	<p>9. Close the Service Management Administrator</p> <p>10. Reset IIS</p> <p>2. Or if this is not an acceptable approach , after adding the and saving the new Contact Object refresh the Account View using the "Refresh" icon in the main toolbar</p> <p>If a device accessed by a UNC path requires user credentials for access a user must already have logged into this resource before it can be access through an active link in an HTML or URL enabled field.</p>
104787	Text "<BOD" appears automatically. Can't enter any text if field committed with HTML and URL support	<p>A field that is HTML enabled will store the HTML tags along with the visible text. As such when an ITSM administrator adds an HTML enabled field to a Business Object this field must be sized to accommodate these tags along with the user entered text. As a minimum an HTML enabled field should be the expected size of the user input plus 50 characters.</p>
105725	URL support for HTML enabled fields only works if the field is set to read only	<p>The 6.3 release contains support for the following URL types in HTML fields:</p> <p>file: //</p> <p>http://</p> <p>mailto:</p> <p>ftp://</p> <p>lotus://</p> <p>callto://</p> <p>For these links to be active the associated field must be set to read only. Since the Admin Security Group typically would need to have rights to create this content, users viewing this content would need to use a perspective where the field has been set to read only.</p>
106574	Knowledge Management: MS Office 2007 and Open Office documents get 'Document not found' error when trying to open after attaching and saving article	<p>This happens only on Windows 2008 and Vista. Typically the "Document Not Found" error shows up briefly and then the document can be displayed.</p>
106592	Knowledge Management:- Does not properly save TIFF files	<p>For some systems a files with a .TIFF extension can not be rendered when selected from within the document. They can be viewed by double clicking on the file within the document tree view.</p>
106948	Unable to set up 2-tier connection to Oracle 10g (10.2.0.3.0)	<p>Microsoft introduced changes to the Distributed Transaction Coordinator (DTC) with Windows Vista and Windows Server 2008. Oracle Services for MTS 10.2.0.4 and higher, with the exception of 11.1.0.6, support this new DTC when the minimum operating system level is Windows Vista with Service Pack 1 or Windows Server 2008.</p>

Issue	Title	Work-Around
		<p>This issue can be resolved by downloading and installing the Oracle 11g ODAC components from:</p> <p>http://www.oracle.com/technology/software/tech/dotnet/utisoft.html</p> <p>This includes Oracle Client (11.1.0.7.0) and Oracle Services for MTS (11.1.0.7.20).</p> <p>Installation instructions can be found at: http://www.oracle.com/technology/software/tech/windows/odpnet/install1110720.html</p>
107127	Recurring Revenue or Recurring Revenue by territory empty objects created.	<p>This issue has been logged to document a change in behavior between GMEE 6.0.7 and GMEE 6.3. In GMEE 6.0.7 when a user searches for a Business Object for which there are none, the user gets back a dialog box indicating that there are "No records found" and the toolbar context does not change.</p> <p>In GMEE 6.3.0 even if there are no matching records, an empty search results grid will be shown and the toolbar context will change to that Business Object. With this context change the create new button is available and if the user permissions allow, a new business object can be created. In the case of an aggregate Business Object a user with permissions could directly create new Aggregate Business Object records.</p>
107150	Firefox 3.5.3 – Web Client using File ->New, there are no up and down arrows when displaying all objects.	For most screens the list of New Business Objects will fit on the screen and will not require scrolling. If a users screen is such that scrolling is required then an alternate browser such as Internet Explorer should be used.
107444	Lotus Notes Add-in: Test Connection throws an exception.	This is intermittent and can be ignored. If the error occurs select the "OK" button to close the dialog and try the test connection again.
108106	Out of the box Reports - Need to be rebuilt with Crystal Reports 2008 otherwise the new feature "Toggle Parameter Panel" won't work	If users would like to take advantage of new features available in Crystal Reports 2008 any existing reports will have to be rebuilt with the Crystal Reports 2008 designer.
109682	Attachment (.doc) with size greater than allowed gives Page Not Found Error.	This error message is misleading; it can be eliminated by increasing the size of files that can be attached to a Business Object. This size setting is controlled by the key (shown below) that is located in the web.config found in the ServiceManagementWeb directory. The key value is in kbytes.
110125	Internet Explorer 8 - Web Client: Selecting	<p><add key="AttachmentMaxSize" value="3072"/></p> <p>The process of selecting the "Compatibility View" button that displays will either result in a loss of connection and a</p>

Issue	Title	Work-Around
	the Compatibility View produces a Licensing Error	server error on refresh or will produce a Licensing Error dialog. In either case the user need to log into the application again.
110129	Quick Action Run for Group 'Continue on error' feature does not work in some situations.	Some Quick Actions produce errors that will override the "Continue on error" selection and result in termination of the Quick Action. No work around is currently available.
110324	Outlook Add-in: Embedded images in HTML e-mails - when viewing attached e-mail in form view, images do not show up.	<p>This is an issue with the installation of the FusionImageManager virtual directory on a server running Windows 2008. There are 2 options to resolve this issue:</p> <ol style="list-style-type: none"> 1. Correct the default page for the FusionImageManager as follows: <ol style="list-style-type: none"> 1. Go to the IIS Manager 2. Select the FusionImageManager under the Default Web Site 3. Set the Default.aspx as a default page 2. Include the '/Default.aspx' in the Webserver URL location as follows: <ol style="list-style-type: none"> 1. Launch the Service Management Administrator 2. Select "System Settings" -> "E-mail/Calendar" 3. In the "E-mail and Calendar Settings" dialog <ol style="list-style-type: none"> a. Select "Mail Settings" b. In the "Mail Settings" dialog select "Advanced Settings" c. Add the /Default.aspx to the end of the URL under "Webserver URL Location for Embedded Images" d. Select "OK" 4. Select "OK" and close the Service Management Administrator 5. Reset IIS

Documentation issues:

Issue	Description
109584	If you want to delete any part of the main query line (the part that begins with "Search...", you must delete the entire FRS Default Search entry from the Search Center window, and then create a new FRS Default Search entry with the query you want.
110023	The following information applies to the section on Embedded Image Manager for

the Outlook and Lotus Notes integration chapters in the Foundation Administrator Reference Guide:

If you want to store the images on a host other than your localhost, enter a UNC path that includes the host's physical name or IP address and an accessible folder. For example:

\\myhost\shared\inlineimages *or*

\\10.101.183.37\images

110035 The icon indicating a reference to another topic in the Document Conventions section of the Foundation Administrator Reference Guide is incorrectly listed as "&". It should be the "open book" symbol instead. Refer to any other Foundation manual for the correct icon.

In the section "Integrating with Microsoft Outlook", the following step is no longer applicable:

"7. Add columns to Outlook (Outlook). This lets you display a column in your Outlook Inbox and/or Sent folder. The column contains a check box indicating whether or not an e-mail is linked to a record."

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