Crm Customer Relationship Management

CRM.Cockpit Installation Guide

Version 14.1

Aurea

Unlimited Possibility

Notices

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Preface

For details, see the following topics:

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About this documentation

This guide is part of the documentation set for Aurea CRM.

Notation conventions

This document uses the following notation conventions:

Convention	Meaning
Fixed-width	Fixed-width font indicates code, path names, file names, environment variable names, parameter names, command names, machine names, URLs.
Bold Fixed-width	**Bold Fixed-width** font is used to indicate user input or to emphasize certain lines of code.
Italic Fixed-width	*Italic Fixed-width* font indicates a placeholder for which you must supply a value.
Bold Sans serif	**Bold sans serif** typeface indicates the names of graphic user interface elements such as dialog boxes, buttons, and fields.
Italic serif	In text, *italic serif* typeface indicates the first use of an important term. The term is defined in the glossary.
Underlined	Underlined text in command lines and parameter descriptions indicate that you only have to enter the underlined part of the command or parameter name. For example, if you use the -LOGFILE parameter in a command, you only need to enter -LOGF.
[ ]	Brackets enclose optional arguments.
{ *a* | *b* | *c* }	Braces enclose two or more items. You can specify only one of the enclosed items. Vertical bars represent OR separators. For example, you can specify a or b or c.

Convention	Meaning
…	Three consecutive periods indicate that you can repeat the immediately previous item. In code examples, they can be horizontal or vertical to indicate omissions.
Menu > Choice	An angle bracket between two menu items indicates that you should choose an item from a menu. For example, the notation **File** > > **Exit** means: "Open the **File** menu and choose **Exit**."
>>	Links to related information in other chapters or documents are indicated using the **>>** symbol.

Aurea global support

If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please open a ticket on Aurea Support Central. Preferably, search the articles on the Aurea Knowledge Base for solutions to your issues before opening a ticket.

Information about the support organization is available on Support Central. The product documentation is available at https://help.aurea.com/crm/#.

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, contact us through our website.

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Introduction

This document describes the installation of Aurea CRM.Cockpit.

For details on using CRM.Cockpit, refer to the user manual.

All available documentation can be found on the Aurea CRM support page at

https://support.aurea.com/

CRM.Cockpit is a .NET 4.5 based Windows application, providing full access to the Aurea CRM configuration and the CRM.designer database.

It is not possible to start CRM.Cockpit over a network; if different users wish to access from different computers, each user has to install his own version of CRM.Cockpit.

All screenshots in this manual apply to the BTB vertical.

Documentation PDFs

Download the pdf help Cockpit installation.

Document	Description
Cockpit installation Guide	A manual for the Cockpit installation.

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Setup and Installation

Learn how to setup and install cockpit and the preconditions for installation.

Preconditions for installing CRM.Cockpit:

- Log on to Windows with administrator privileges.
- Ensure you have enough free disk space (as specified in the system requirements).
- Ensure you are using a supported operating system.
- Setup requires .NET Framework 4.5: If not installed the setup will automatically install it. If .NET Framework 4.5 is installed but not activated setup is canceled with a Windows error message.
- Setup requires an existing database engine (MS SQL or Oracle).
- Update recommends installing to a dedicated target directory, e.g. `C:\up-date.CRM\cockpit`) and defining sufficient access rights for this directory: This ensures that user groups working with are able to create and modify files and folders (Write/Modify rights).

Setup Types: CRM.Cockpit has full setup including all required 3rd-party products

Note: You can find all system requirements (hardware, software, disk space, access rights etc.) at https://support.aurea.com/

Starting the Installation

Learn how to install the CRM.cockpit program.

To start the installation:

1. Copy the installation file `CRM.cockpit_<vertical>_<version number>_full.exe` to a local drive.
2. Start `CRM.cockpit_<vertical>_<version number>_full.exe.`. Setup starts. Click the System Requirements button to view the system requirements.
3. Click **Next**.
4. Select the database type you use and click **Next**.
   - MS SQL Server, Connection Settings for SQL on page 11
   - Oracle Database Server, Connection Settings for Oracle on page 14
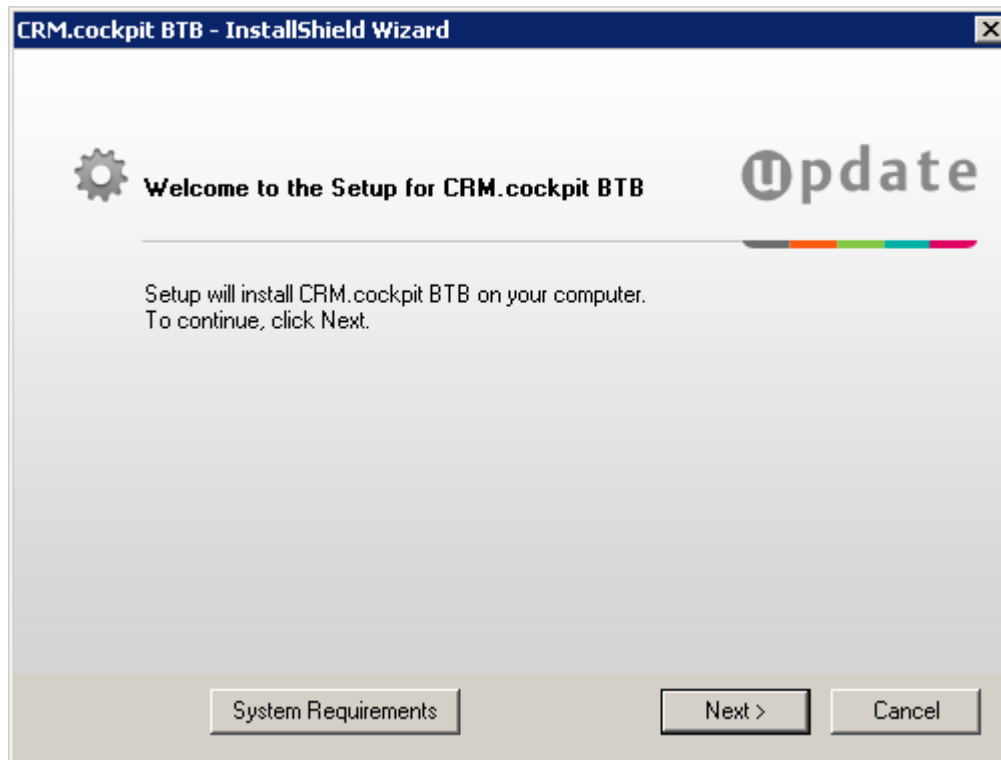
Note: If no Aurea CRM.Win installation is detected on the current machine you are prompted to enter the database connection info for an existing Aurea CRM.Win database:

5. Choose the destination folder and click **Next**. (If you change the path, information on the available and required disk space is displayed.)

   This directory is the application root directory where setup copies the files. is installed in \update.CRM as root directory, and automatically creates a `CRM.cockpit<vertical>` directory with the following directory structure:
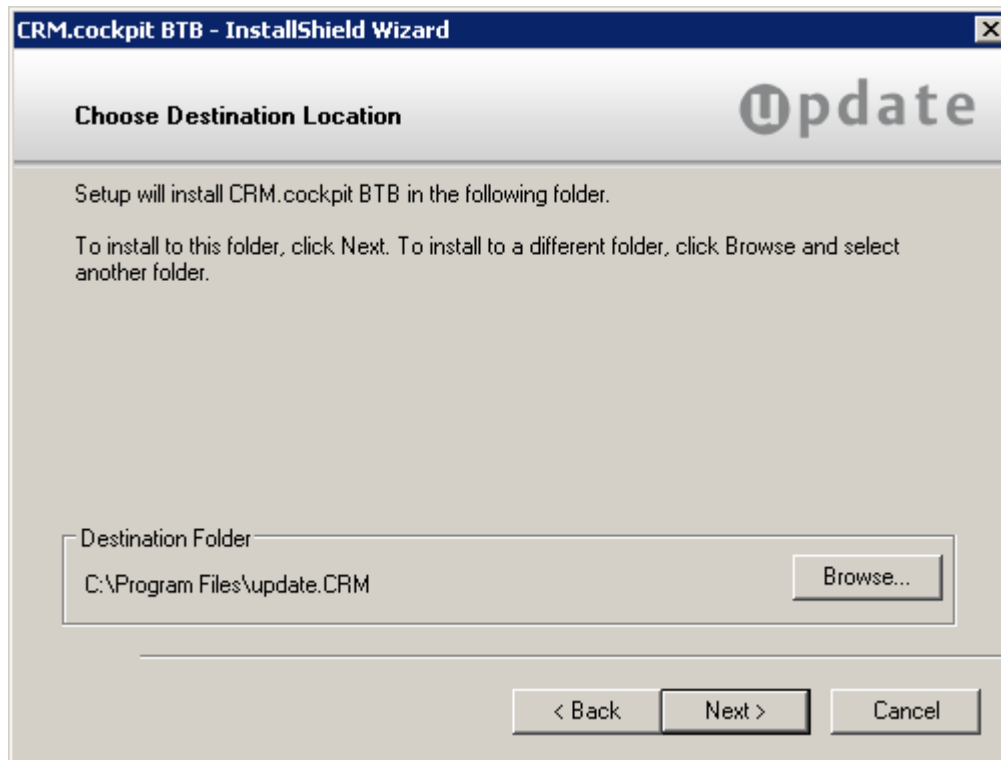
6. Verify your settings on the installation summary that is displayed. Click **Back** to change your settings. Click **Install** to start the installation process.Setup copies the program files to the directories you have specified. Your database connection settings are applied. Shortcuts are added to the **Start** menu.

- update.CRM
  - CRM.cockpit BTB
    - bin
    - Manuals
    - Resources
      - DataModelExplorer
      - Help
      - Html
      - Images
        - About
        - Crm
        - Global
        - Import
        - MainForm
        - RoundedBox
        - Toolbar
        - TreeView
      - Import
      - Localization
        - eng
      - Scripts
      - Styles
      - Transformations
        - Configuration
        - Crm
        - Files
    - system
      - settings
      - sys

7. Click **Finish** to end the installation.

Setup checks whether it already has installed on this machine. If yes, the program maintenance is started, see Program Maintenance on page 17.

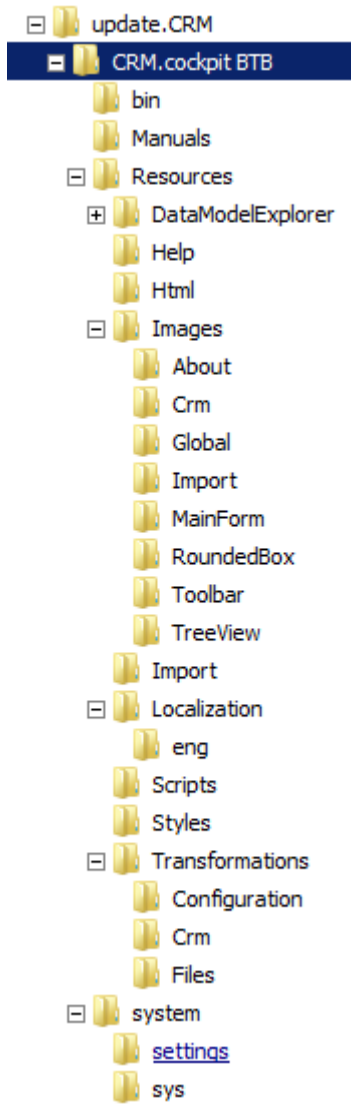# Connection Settings for SQL

Learn about connection setting for SQL.

If no Aurea CRM.Win installation is detected on the current machine you are prompted to enter the database connection info for an existing Aurea CRM.Win database:
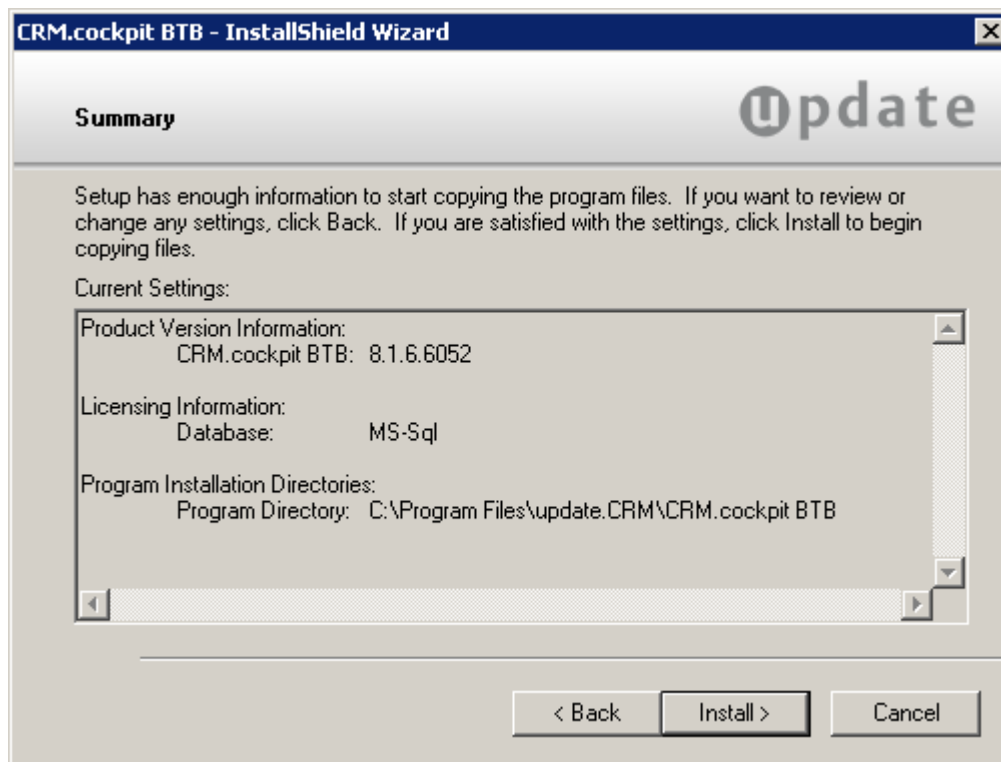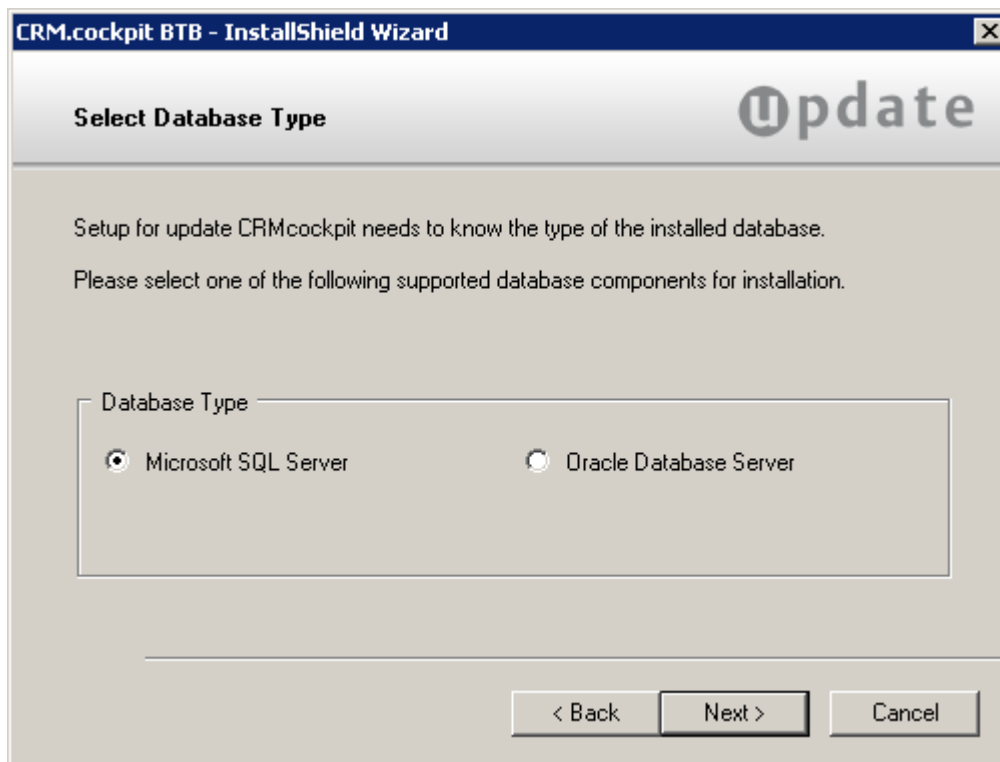
1. Enter the information on the **CRM.designer Database Connection Info** screen as per table below and click **Next**.

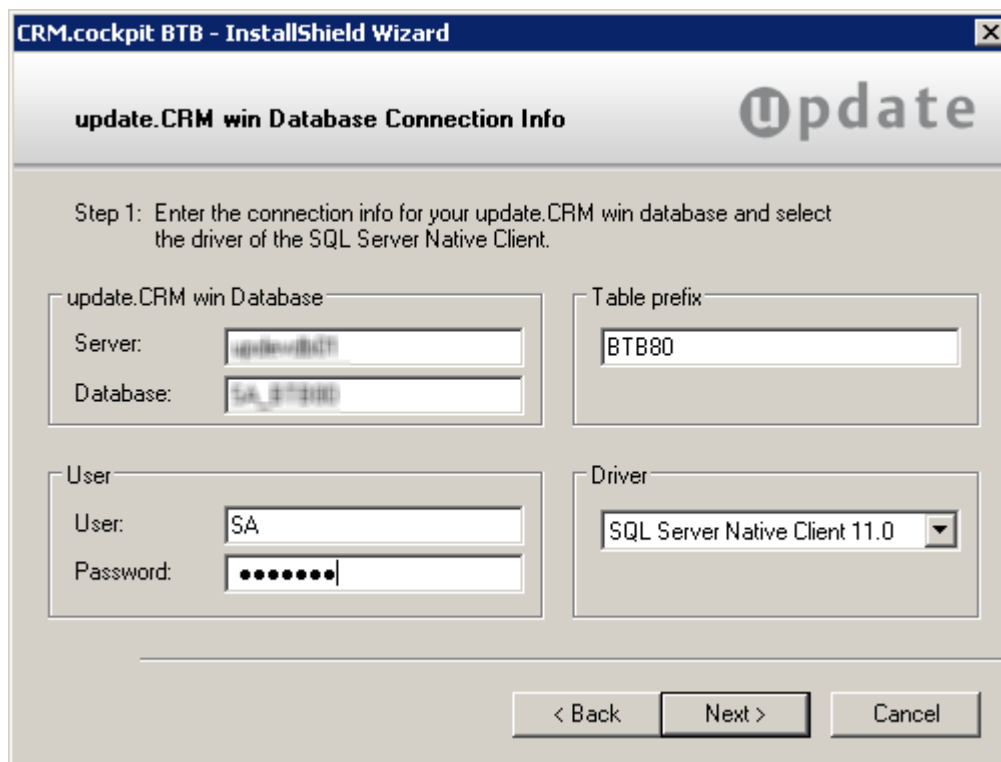| Fields	Description
Server	Enter the database server name.
Database	Enter the name of the Aurea CRM database.
User/Password	Enter the user name and password for the Aurea CRM database.
Table prefix	Enter the table prefix used to access all of Aurea CRM's tables.
Driver	Select the desired SQL driver in the Driver field: • SQL Server Native Client 10.0 for MS SQL Server 2008 R2 • SQL Server Native Client 11.0 for MS SQL Server 2012 and 2014

2. Enter the database connection info for an existing CRM.designer database:
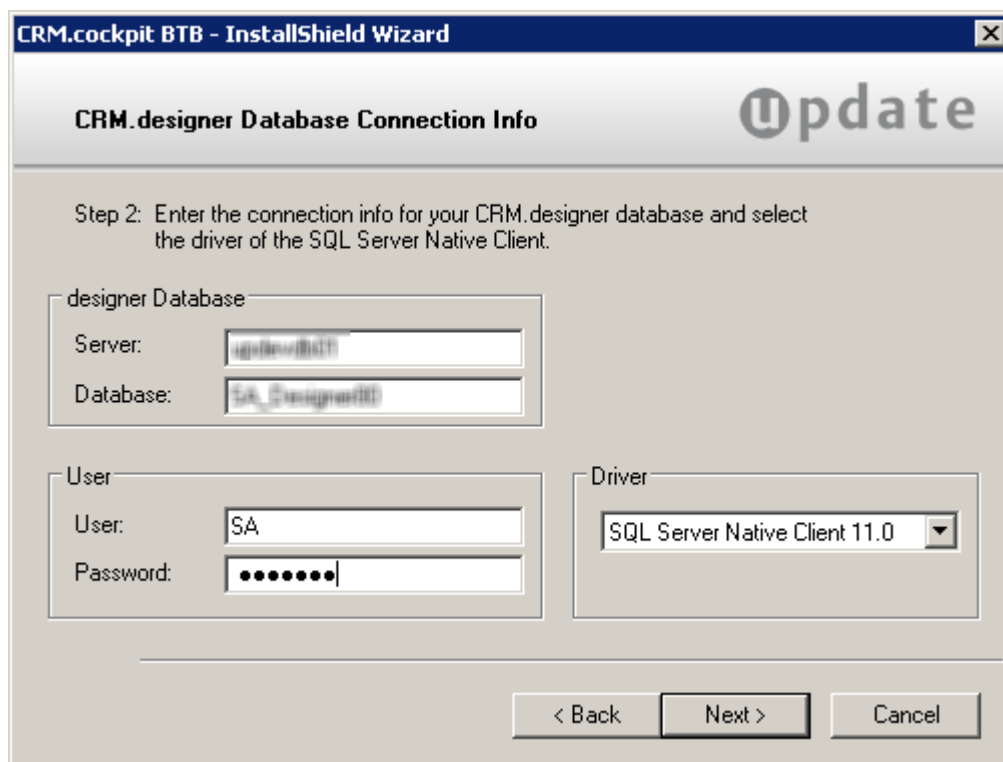
Enter the connection information:

• Server: Enter the database server name.

• Database: Enter the name of the CRM.designer database.

- User/Password: Enter the user name and password for the CRM.designer database.

- Driver: Select the desired SQL driver in the Driver field:

    - SQL Server Native Client 10.0 for MS SQL Server 2008 R2

    - SQL Server Native Client 11.0 for MS SQL Server 2012 and 2014

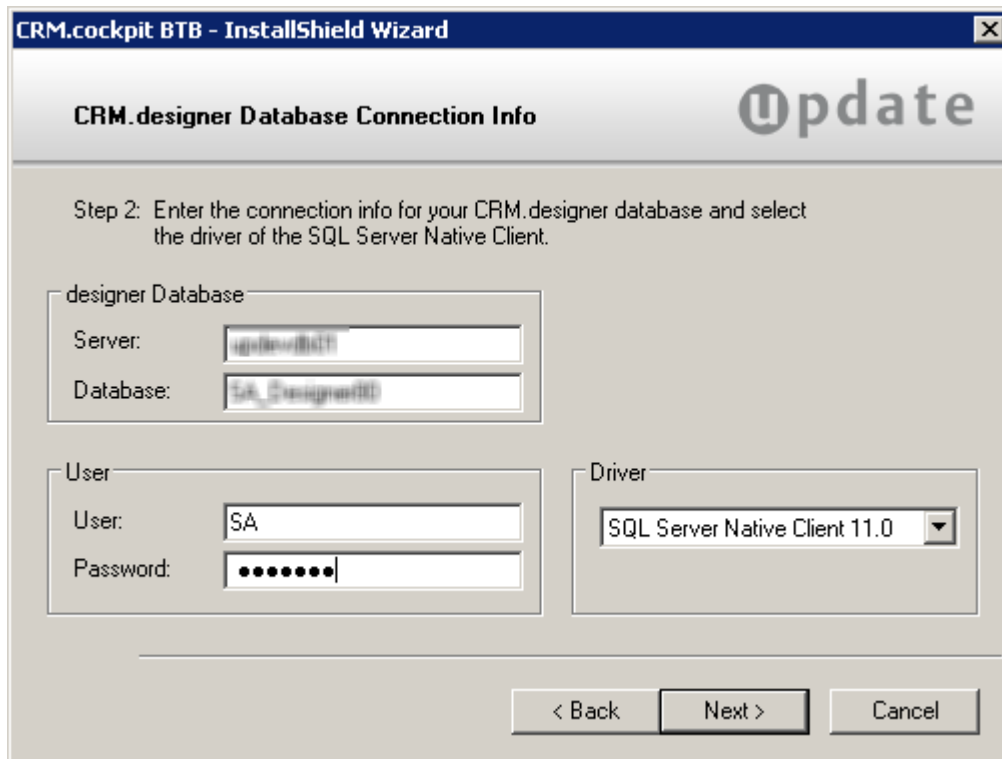   Setup does not verify your settings. The database must either exist already or you need to create it manually.

    The connection string is written to the `settings.xml` file (<designerDsn> entry).

3. Click Next.

Connection Settings for Oracle

Learn about connection setting for oracle.

To configure the connection between and an (existing) Oracle database, enter the details in the below table and click **Next**.

Field	Description
Database	Enter the name of the connection be-tween the Oracle client and Oracle server (Oracle Net Service Name) in the Host string field (max. 127 characters).
User	Enter the User name and Password of the Oracle user whose schema includes the Aurea CRM tables.
Table prefix	Enter the Table prefix used to access all of Aurea CRM's tables.

Your settings are saved in the `mmdb.ini` file, see *mmdb.ini File for Oracle Databases* in the *Aurea CRM.core Administrator Guide*.

Aurea CRM User Configuration Tool

Learn how to configure users on the cockpit program.

Map the two special users (WWW and SPECIAL) and their passwords with the update CRM User Configuration tool (`..\bin\update.Users.exe`).

The encrypted credentials are stored in the users.xml file stored in the `..\sys-tem\settings` directory. You are prompted to enter the path to the `users.xml` file when starting `update.Users.exe`.
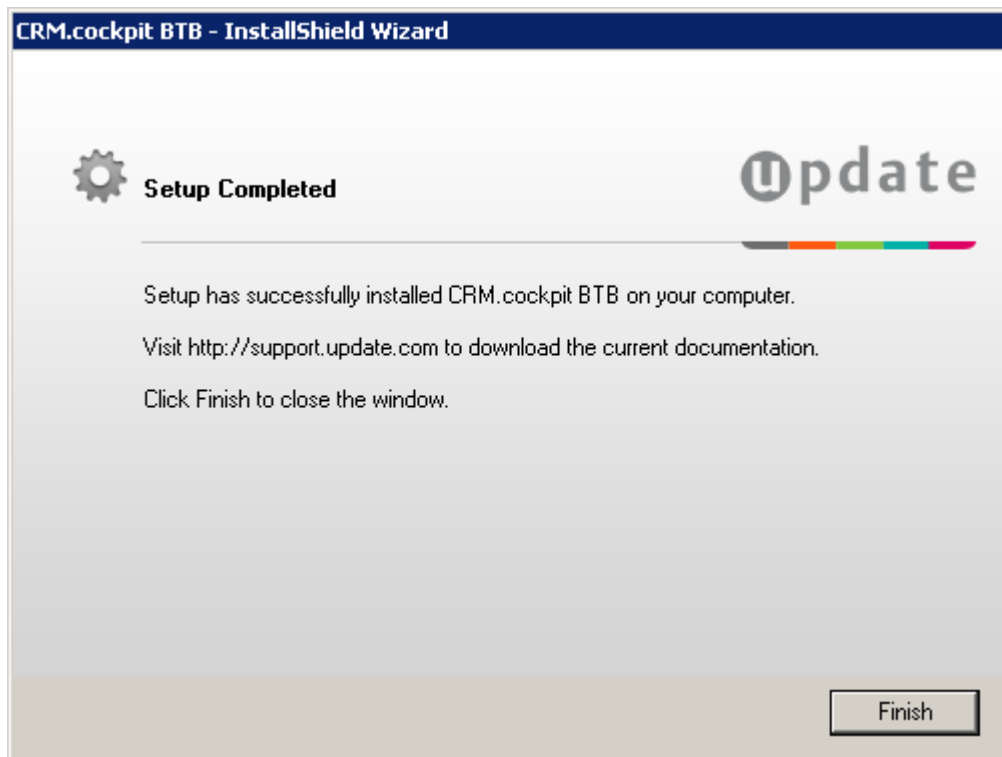
Assigning the Special Users for CRM.cockpit

Learn how to assign special users for CRM.cockpit.

You need to assign these special users to two different Aurea CRM users with the User Configuration Tool.

WWW user

This account establishes a connection to Aurea CRM before a user actively logs on with her user name and password.

For security reasons, this is a "shadow account". You are not allowed to log on directly to CRM.cockpit using the shadow account's user name and password. To enhance security even more, you can change the WWW user's name.

To run , create a rep and login record for the WWW user in the Aurea CRM.Win Rights module.

Assign the WWW user to his Aurea CRM user (login name and password) with the User Configuration tool.

SPECIAL User

You must grant full access to all Aurea CRM info areas to this user. uses this user internally when the rights of the active users are not sufficient for a required task, e.g. for data model enumerations, etc.

The SPECIAL user is a "shadow account" as well. In order to enhance security even more, change the SPECIAL user's name (e.g. MY_SPECIAL) and map the user with the User Configuration Tool.
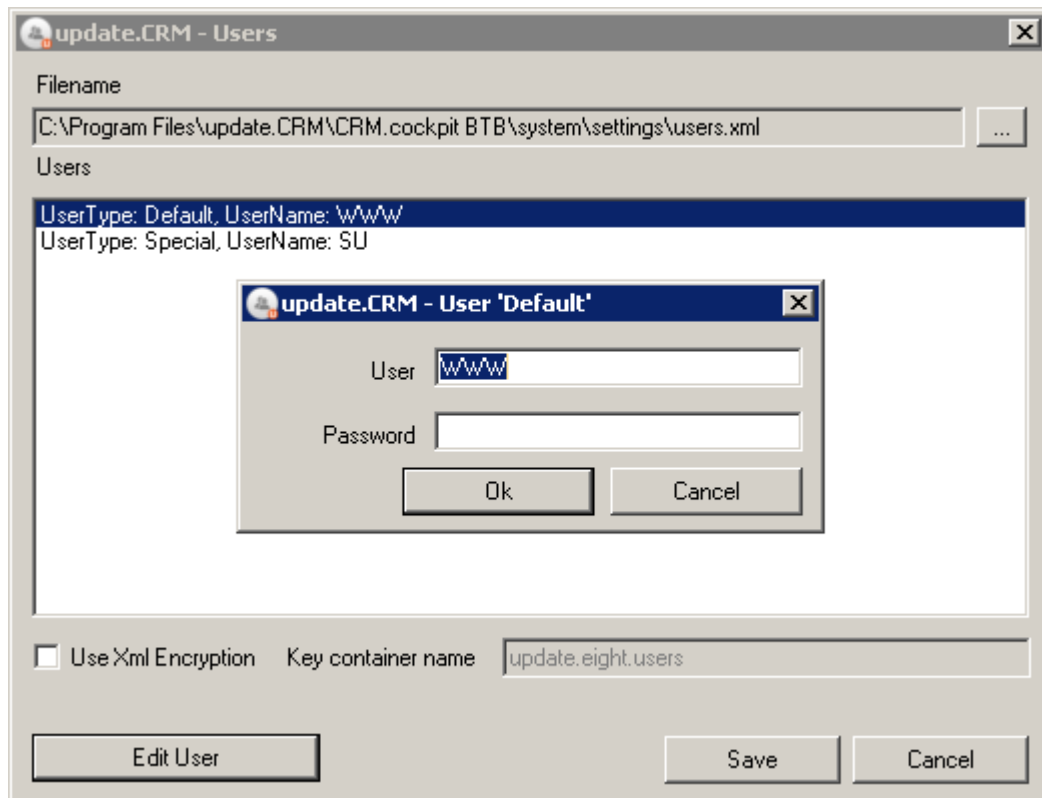
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Program Maintenance

Learn how to maintain the Cockpit program.

To subsequently change, repair or uninstall the installation of :

1. Select **Start menu >Settings> Control Panel > Add/Remove Programs .**

2. Select the corresponding entry from the list.

3. Click on **Change/Remove**.

4. The Program Maintenance window is displayed:

- Select **Repair** to repair the installation.
- Select **Remove** to uninstall .

5. Click **Next**.

Repair

Learn hot to repair your installation of CRM.Cockpit.

To repair your installation:

1. Start the program maintenance.

2. Select **Repair**.

3. Click on **Next**.

The repair function recopies all the setup files to the destination directory and adds shortcuts to the Start menu, without you having to specify the settings again. This allows you to restore missing files or links.

Note: If you use the repair function, your installation is reverted to the original version you installed. You may therefore need to reinstall any necessary hotfixes.

Installing Languages

Learn how to install available language in the CRM cockpit program.

Setup automatically installs all currently available languages.

Not all language versions are available for each vertical (BTB, FS, OTC). For a list of the available Aurea CRM languages, see https://support.aurea.com/

Newly available languages are automatically installed in the course of hotfix installations, see the *Installing Hotfixes* guide available from https://support.aurea.com/

Note: The user interface is always displayed in English. Additionally installed languages only affect the names of info areas, fields and catalogs.
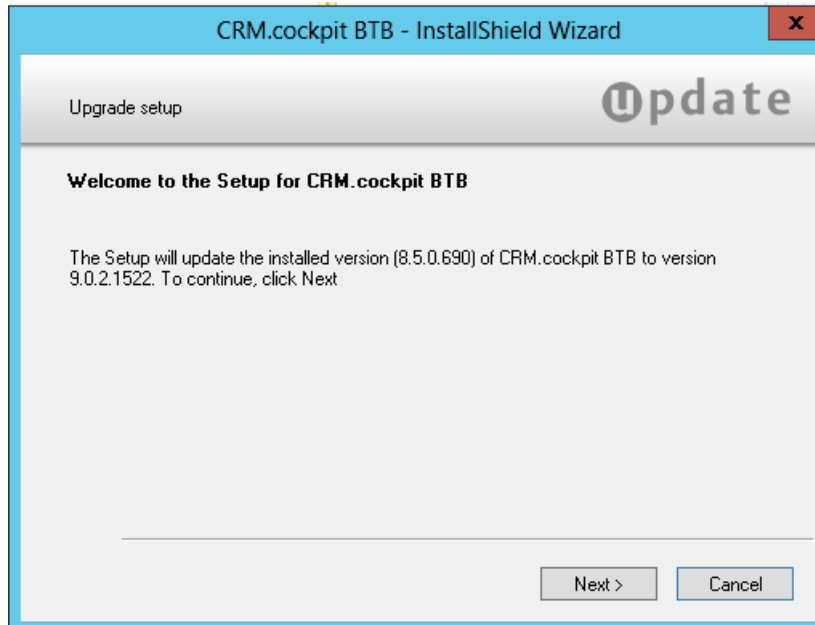
Uninstalling CRM.cockpit

Learn how to uninstall Aurea CRM.cockpit.

To uninstall :

1. Start program maintenance.

2. Select **Remove**.

3. Click **Next**. You are prompted whether you are certain you wish to remove all installed files and features.

4. Select **Yes**. All installed components are removed.

5. You are prompted whether you want to remove the installation directory:

6. Select the option if you wish to delete the installation directory as well and click Finish.
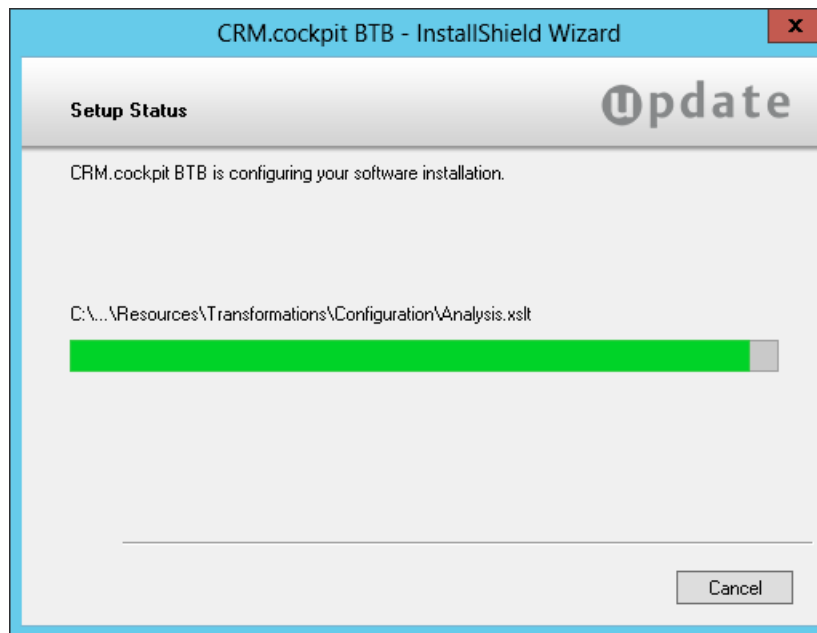

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Troubleshooting

Learn about some troubleshooting tips.

Missing Connection to update CRM.designer

If the following error message is displayed when you start you should check the settings for the CRM.designer connection in the `system\settings.xml` file:



```
<!DOCTYPE u8[
   <!ENTITY Vertical "Bb">
   <!ENTITY VERTICAL "BB">
   <!ENTITY designerDsn "Provider=SQL Server Native Client 11.0;Data
Source=MyServer;Initial Catalog= webdesigner80;UID=mm; PWD=mm">
   ]>
```

Incorrect Connection to Aurea CRM database

Check the information for connecting to the Aurea CRM database in the `system\sys\mmdb.ini` file if the following message is displayed on cockpit startup:

```
[MM ODBC MSS]
CONNECTION=Driver=SQLServer;Server=MyServer;Database=MyDatabase;UID=mm;PWD=mm;
TABLE_PREFIX=BTB80
```
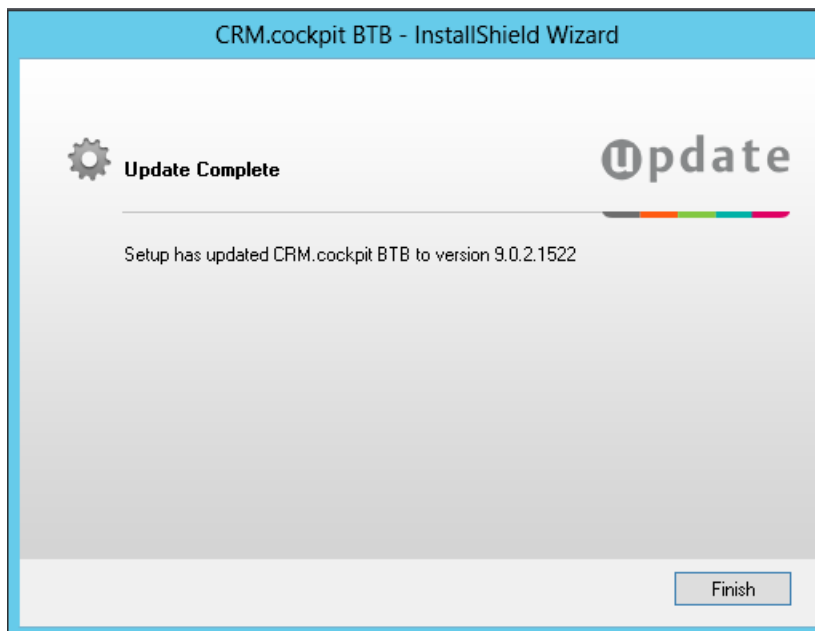
Log File

Logging is configured in the `settings.xml` file, stored in the `..\system\settings` directory. The XML

element `<Logging />` contains the relevant settings.

```
<Logging facilityFilterExclude="(web)|(Configuration\.)|(update\.Crm\.Core)">
<!-- update.cockpit.log -->
<Channel logLevel="Error" logLevelDebug="Debug" writerName="CoreLog"
formatterName="Default"/>
<Writer filePath=".\Log\Cockpit\update.cockpit.log"
    name="CoreLog"
    maxSizeKB="40960"
    closeOnIdleTimeout="5"
    type="update.Lib.Logging.Writers.FileLogWriter,update.Lib" />
…
</Logging>
```

Possible values are:

- NoLogging
- Emergency
- Alert
- Critical
- Error
- Warning
- Notice
- Info
- Debug

Each level increases the amount of details logged.

Set the `facilityFilterExclude` attribute to a regular expression in order to filter which facilities are written to the log file.

```
<Logging facilityFilterExclude="(Configuration\.)">
```

This excludes all output from facilities containing "Configuration.".

The core components of Aurea CRM can add additional information to the log (SQL statements, triggers, etc.). Check Web Trace in the Station Configuration (Aurea CRM.Win Rights module), to activate the statement log.