Customer Relationship Management

CRM Installing Hotfixes

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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Quick instructions

Overview of the general instructions on hotfixes installation.

To update your installation:

1. Download the required hotfixes. For further details, see Downloading and installing hotfixes on page 7.

2. Install the Aurea CRM win hotfix. For further details, see Installing an Aurea CRM win hotfix on page 7.

3. Install the Aurea CRM web hotfix. Update the CRM.designer database, processes and roles, stored procedures and the default configuration. For further details, see Installing a hotfix for Aurea CRM web and CRM.designer on page 8.

4. Install hotfixes for your other Aurea CRM applications.For further details, see Installing a hotfix for other applications.

Back-up of the Installation Directory

The content of the installation directory is copied to the `\Users\All Users\up-dateCRMbackup\<Anwendung>` folder by default.

You can define another directory where you want to back up the installation.

Upgrade_to_check directory

Existing configuration files are not automatically overwritten when a hotfix is installed. They are copied to the `upgrade_to_check` directory (a subdirectory of the application's root directory). This ensures that changes you made in your configuration files are not lost. Compare the files containing your customizations with the newly installed files (in the `upgrade_to_check` directory), re-apply the desired customizations and replace your files with the ones from the `upgrade_to_check` directory.

Some hotfixes also include additional configuration files. These files are also stored in the `upgrade_to_check` directory and you need to copy them to the `settings` directory of your Aurea CRM web installation.

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Downloading and installing hotfixes

If you are using several Aurea CRM products, download and install all the required hotfixes for Aurea CRM win before updating the other applications.

To download a hotfix:

1. Open the update support website https://support.aurea.com.
2. Open the download area for Aurea CRM (**Resource Center Download Library**).
3. Select the product you want to download a hotfix for in the left frame.
4. Click on **Hotfixes** in the right frame.

Follow the instructions to create and download your hotfix:

1. Select your vertical from the first drop-down list, your installed version in the second drop-down list, and the desired hotfix in the third drop-down list.
2. Click **Bugfix List** to view an overview of the bugs fixed.
3. Click on **Create Hotfix** to create it and on **Download Hotfix** to download the file.

Installing an Aurea CRM win hotfix

Aurea CRM win hotfix is needed to update the data model.

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To install an Aurea CRM win (core) hotfix:

1. Back up your database and all files you adjusted manually, e.g. configuration and CSS files.
2. Execute the downloaded hotfix file. The hotfix is installed in silent mode and no user interaction is required.
3. Start Aurea CRM.Win and login as **SU** (super user) to update the data model.

Installing a hotfix for Aurea CRM web and CRM.designer

You need to update Aurea CRM win before installing an Aurea CRM web hotfix. Also check whether a CRM.designer hotfix is available.

Note: Database changes are included in the update.CRM web hotfix.

To install an Aurea CRM web hotfix:

1. Close all open Aurea CRM web and CRM.designer instances and stop all running services (CRM.server and ISS Application Pool for Aurea CRM web)

2. Back up your CRM.designer database and any files (e. g. configuration or CSS files) that you have edited.

3. Execute the downloaded hotfix file.

   The hotfix is installed in silent mode; no user interaction is required.

When you install a new hotfix, in addition to executing the hotfix file for Aurea CRM web, you also need to update the CRM.designer database, stored procedures and default configuration even if you did not install a CRM.designer hotfix. See the following sections in the **CRM.bulkloader** chapter in the *Aurea CRM web Administrator Guide* for a more detailed description:

1. Update the CRM.designer database.

2. Update stored procedures.

3. Upload the default configuration.

4. Transfer Aurea CRM data model changes to the Aurea CRM designer database.

After installing the hotfix:

1. Compare the files you backed up with installed files and edit them if necessary.

2. Restart all services.

Installing an Aurea CRM web offline hotfix

Learn how to install hotfixes for specific web offline users.

To install an Aurea CRM web offline hotfix:

1. Copy the downloaded hotfix file to the desired directories:

   - `<GlobalPatchDirectory>`: Available to all Aurea CRM web offline users.
   - `<CommunicationPath>\{offlineStationNumber}\patches`: Available to a specific Aurea CRM web offline user.

Both directories are defined in the `Offline.xml` file. If the hotfix file is copied to both directories, the hotfix file for the specific user is applied.

Note: Users can download and install the hotfix on their client with CRM.launcher.

Installing a CRM.Phone hotfix for Aurea CRM

You can install CRM.Phone using the Aurea CRM win or Aurea CRM web setup.

If you install CRM.Phone for Aurea CRM web, a master installation is created. This master installation contains the required MSI installation packages that must be deployed to the users, otherwise they cannot use CRM.Phone. The CRM.Phone hotfix updates the master installation.

For more information about MSI packages, see the *CRM.Phone Installation Guide*. To install a CRM.Phone hotfix for Aurea CRM Web's master installation:

1. Execute the downloaded CRM.Phone hotfix file.

2. The following files are located in the `upgrade_to_check` directory:

   - `update CRMphone.manifest.xml`
   - `Create_UpdateCRMphone_setup_fullinstallation.bat`
   - `Text.wxi`

- `VersionNumber.wxi`

- `updateCRMphone_fullinstallation.wxs`

3. Copy these files to the directories in the following list to ensure that the AutoUpdate and Compiler functions are executed correctly. If you have adapted these files manually, compare their contents before copying them.

   - `PhoneSetupProject\PhoneDeploymentPacket\updateCRMphone.man-ifest.xml`

   - `PhoneSetupProject\PhoneDeploymentPacketCompiler\ Create_Up-dateCRMphone_setu p_fullinstallation.bat`

   - `PhoneSetupProject\PhoneDeploymentPacketCompiler\Text.wxi`

   - `PhoneSetupProject\PhoneDeploymentPacketCompiler\VersionNum-ber.wxi`

   - `PhoneSetupProject\PhoneDeploymentPacketCompiler\ updateCRM-phone_fullinstall ation.wxs`

Note: To install a CRM.Phone hotfix for win, you only need to run the hotfix file.

Upgrade templates

The template upgrade follows the same steps as the initial import.

To upgrade a template, perform the steps for the respective vertical as described in Template Upgrade in Aurea CRM Industry Solution Installation guide.

Here's a list of templates you can upgrade:

- Cockpit Import (OP)

- Upgrade information for ISI Version 2 (BS)

- Upgrade Information for ISI Version 3 (BS)

- Upgrade Information for ISI Version 4 (BS)

- Upgrade Information for ISI Version 6 (BS)

- Upgrade Information for LSI Version 3 (BS)

- Upgrade Information for LSI Version 4 (BS)

- Upgrade Information for LSI Version 5 (BS)

Parameters for all Aurea CRM applications

Parameters add more configuration to the hotfix installation.

Hotfixes are executed in silent mode without any user interaction.You can start the hotfix with several parameters. Parameters can be combined in any order.

The following parameters are available for all Aurea CRM applications:

Parameter	Description
`--silent=yes`	No messages are displayed once the installation is complete.
`--Log=<Path>`	Specify the log file path. If you do not specify this parameter, the log file is written to the current user's `My Documents` directory.
`--Path=<Installation> path>`	The path to your Aurea CRM installation root folder. Only required, if the hotfix is installed without setup.
`--NoBackup`	Determines whether no backup is created: • `No` (default): The installation directory is backed up. • `Yes`: The installation directory is not backed up.
`--BackUpLocation=<path>`	The path where all files from the installation directory are backed up. If no path is specified, the backup files are written to the following directory: `\Users\All Users\update-CRMbackup`

The following additional parameter is available for applications that require IIS:

Parameter	Description
`--IISReset=yes`	Restarts IIS after installing the hotfix.

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Log Files

During the installation of hotfixes, information is written to log files.

By default, these log files are written to the `MyDocuments` directory of the current user. You can use the `--Log` parameter to specify another directory, For further details, see Parameters for all Aurea CRM applications on page 11.

Successful Installation

If the hotfix was installed successfully a log file named on the following template is created: `Patch_succeeded_<Produkt>_<Branchenversion>_<Hotfix No.>_Log.txt.` A sample log file name could be `Patch_succeeded_web_BTB_11.2.10.800_Log.txt.`

Unsuccessful Installation

If the hotfix could not be installed successfully a log file named on the following template is created: `Patch_failed_<Produkt>_<Branchenversion>_<Hotfix No.>_Log.txt.` A sample log file name could be `Patch_failed_web_BTB_11.2.10.800_Log.txt.`