Customer Relationship Management

CRM Win Installation Guide

Version 14.1

Aurea

Unlimited Possibility

Notices

Notices

For details, see the following topics:

- About this documentation
- Notation conventions
- Aurea global support

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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1

Introduction

This document describes the installation of Aurea CRM win.

For details on administrating Aurea CRM win, refer to the CRM.core and Aurea CRM win Administrator Guides.

All available documentation can be found on the Aurea CRM support page at https://support.aurea.com.

All screenshots in this manual apply to the BTB vertical.

2

Setup and Installation

Learn how to set up and install CRM win.

Preconditions for installing Aurea CRM win:

- 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 Aurea CRM win setup (full) automatically installs 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)
- For the server installation: Ensure that your server is connected to the internet in order to activate Aurea CRM.

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

Understanding Build and Version Numbers in CRM

CRM is a highly modular system. Each module is built and integrated into a package individually.

To understand how the build version number relates to each packaged module, you have to understand the version numbering schema.

Version number is assigned based on the following schema:

`Major_Version.Minor_Version.Patch_Version.Build_Version`

As modules are built individually, **Build** version is relevant to an individual module only, but not to the whole product package. Particular **Build** version of a package can consist of modules with different **Build** versions.

All modules within single product package should always match only by **Major**, **Minor** and **Patch** version, same **Build** version across all modules in a package is not expected.

The full setup includes all required 3rd-party products.

Starting the Installation

Learn how to start installing Aurea CRM win.

To start the installation of Aurea CRM win:

1. Copy the installation file (`update.CRM_win_<vertical>_<version number>.exe`) to a local drive.

2. Start `update.CRM_win_<vertical>_<version number>.exe`. Setup starts.
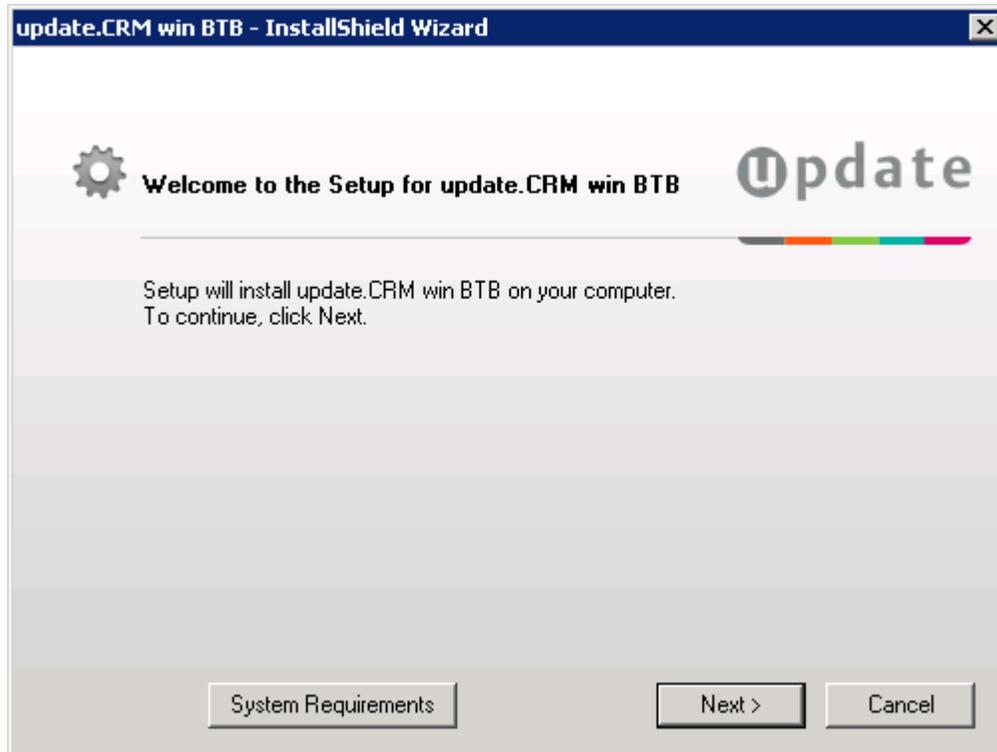
Click the **System Requirements** button to view the system requirements.

Note: Note: This installation setup may require administrator rights.

3. Click **Next**.

Setup checks whether it already has installed Aurea CRM win on this machine. If yes, the program maintenance is started, see Program Maintenance on page 21.

Licensing Information

1. Select the type of installation:

   • **Server installation:** Enter your **Serial Number**. It can be found in the `<Your-Company>_<license type>.txt` file. Once the server installation is complete, you need to activate your serial number, see Activating the Server Installation on page 25.

   • **Demo-Server installation:** Installs a 30 day trial version (max. number of company and person records limited to 500 records each).

   • **Client installation:** Launches the client installation (A Aurea CRM win client allows only for one concurrent user per module (except **Communication**: 99 users)).

   Note: For demo server and client installations neither serial number nor activation are necessary.

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2. Click **Next**.

Database Type
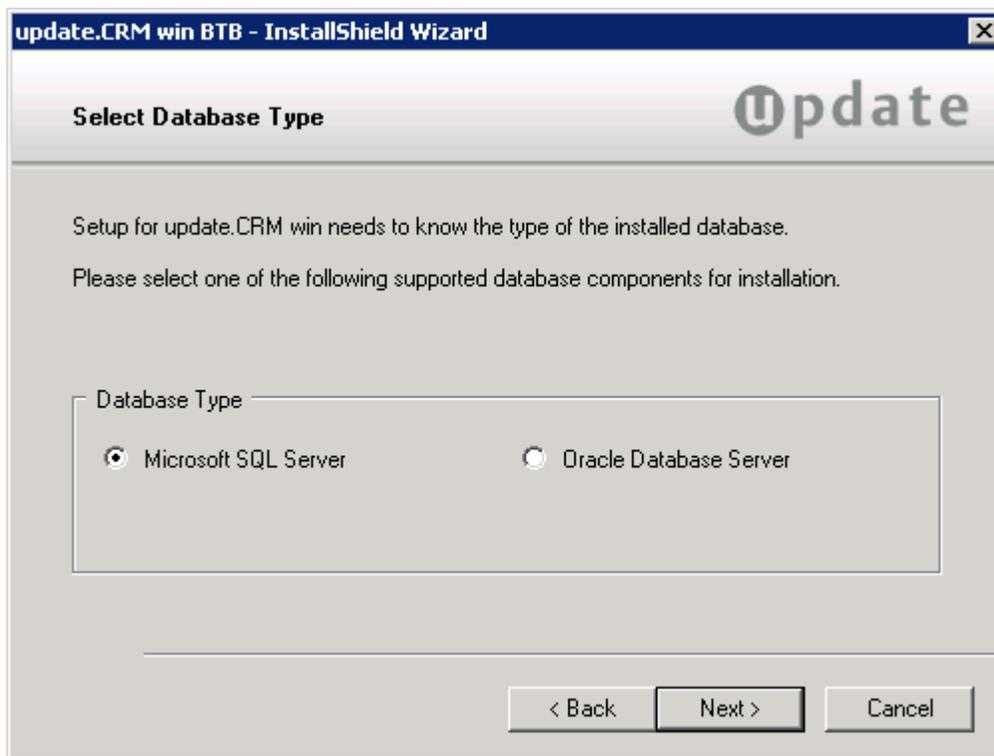
1. Select the database type you use (**MS SQL Server** or **Oracle Database Server**).
2. Click **Next**.

Database and Connection Settings

Depending on the database type you use, you are now prompted to enter the connection settings.

Following two types are available:

- for MS SQL:

    - If a valid native client is found, see Database and Connection Settings for MS SQL.

    - If no native client is found, see Manually Entering the Connection Settings.

- for Oracle, see Connection Settings for Oracle.

MS SQL

Database and Connection Settings for MS SQL

To configure the connection between Aurea CRM win and the MS SQL database enter the following:

1. **Server Options:** Enter the instance and server in the **Server** field.

   Enter the database administrator's user name and password in the **Admin user** and **Password** fields.

2. **Database:** If you wish to create a new database, enable the **Create new database** check box. Disable the check box if you wish to use an existing database.

   Enter the name of the database in the **Name** field.

   All valid sort orders for the database are listed in the **DB collation** field. Select the desired entry.

3. **User:** If you wish to add a new user for the database, enable the **Create new user** check box. Disable the check box if you wish to use an existing user.

   Enter the user name and password.

4. **Tables:** Enable the **New tables** check box if you wish to create new tables. Disable the check box if you wish to use existing tables.

   Enter the prefix used by all tables added by Aurea CRM in the **Prefix** field (max. 16 characters).

5. **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

6. Click **Test** to test the database connection.

7. Click **Next**.

The connection string and table prefix are saved in the `mmdb.ini` file, see mmdb.ini File for MS SQL Databases in the *CRM.core Administrator Guide*.

Manually Entering the Connection Settings

If setup cannot find a valid SQL driver (native client) and therefore no database connection is possible, the following screen is displayed instead of the **Database Configuration** screen:

1. Enter the connection information:

   - **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.
   - **Prefix:** Enter the table prefix.
   - **Driver:** Select an SQL driver.

2. Click **Next**.

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

   Your settings are saved in the `mmdb.ini` file, see mmdb.ini file for MS SQL databases in the *CRM.core Administrator Guide*.

Oracle

Connection Settings for Oracle

To configure the connection between Aurea CRM win and an (existing) Oracle database, enter the following:

1. **Server options:** Enter the name of the connection between the Oracle client and Oracle server (Oracle Net Service Name) in the **Host string** field (max. 127 characters).

   Enter the **Table prefix** used to add all of Aurea CRM's tables (max. 11 characters). The table prefix must be entered in upper case and may not start with a digit.

2. **Login options:** Enter the **User name** and **Password** of the Oracle user whose schema includes or will include the Aurea CRM tables.

3. Click **Next**.

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

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

Database Rights

If you are using Aurea CRM with Oracle, you can add a database user who is assigned the database administrator role, or you can add a new role.

For security reasons, access rights may need to be restricted. Define a user with UNLIMITED TABLESPACE and a role with at least the following rights:

• ALTER ROLLBACK SEGMENT

• ALTER SESSION

• CREATE PROCEDURE

• CREATE ROLLBACK SEGMENT

- CREATE RULE
- CREATE SEQUENCE
- CREATE SESSION
- CREATE SYNONYM
- CREATE TABLE
- CREATE TRIGGER
- CREATE TYPE
- CREATE VIEW
- DROP ROLLBACK SEGMENT

You can also assign access rights to users directly. The CONNECT system role is not required.

As an alternative to UNLIMITED TABLESPACE, you can also use QUOTAS.

Additional Options

Learn about the additional installation settings.
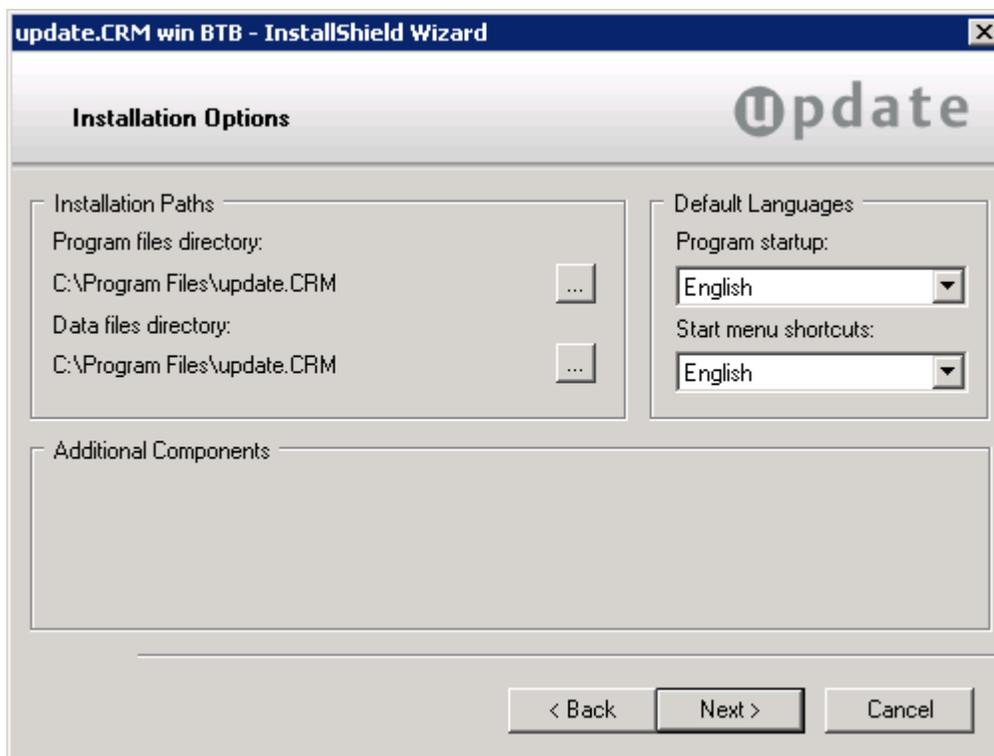
Specify additional settings:

1. **Installation Paths:** Choose the target directory. (If you change the path, information on the available and required disk space is displayed.)

The program files directory is used to store the executables of Aurea CRM win. The data files directory is used to store system settings, user-specific files, log files etc.

By default, the program and data directories are identical, however, it is possible to specify different directories. This is not recommended for administrative reasons. If the program and data directories are different, Aurea CRM has to be started specifying the data directory in the command line, see General Aurea CRM Parameters in the *CRM.core Administrator Guide*.

Note: Aurea recommends installing Aurea CRM win to a dedicated target directory, e.g. `C:\update.CRM\win`) and defining sufficient access rights for this directory: This ensures that user groups working with Aurea CRM win are able to create and modify files and folders (Write/Modify rights).

Note: Starting with **Windows 8:** When installing Aurea CRM win using the default installation paths Aurea CRM win modules that write to the file system can only be executed in Administrator Mode. Workaround: Specify another path or manually change the access rights for `c:\program files\update.CRM`.

Note: Aurea recommends installing Aurea CRM win locally: Due to .NET Framework 4.5 security settings, some of Aurea CRM's functions (component art graphics, external match-up, PDF reports) can only be used by local installations.

2. **Default Languages:** Select the language that Aurea CRM win should start with and the language of the **Start** menu entries.

   Note: The selected language must correspond with the operating system language (Windows system locale) for special characters to be displayed correctly and Start menu entries to be added.

3. Select **Additional Components** (if available) to be installed in addition to Aurea CRM win. More information on these products can be found at https://support.aurea.com.

4. Click **Next**.

Installation Summary

Verify your settings on installation summary.

The installation **Summary** is displayed:
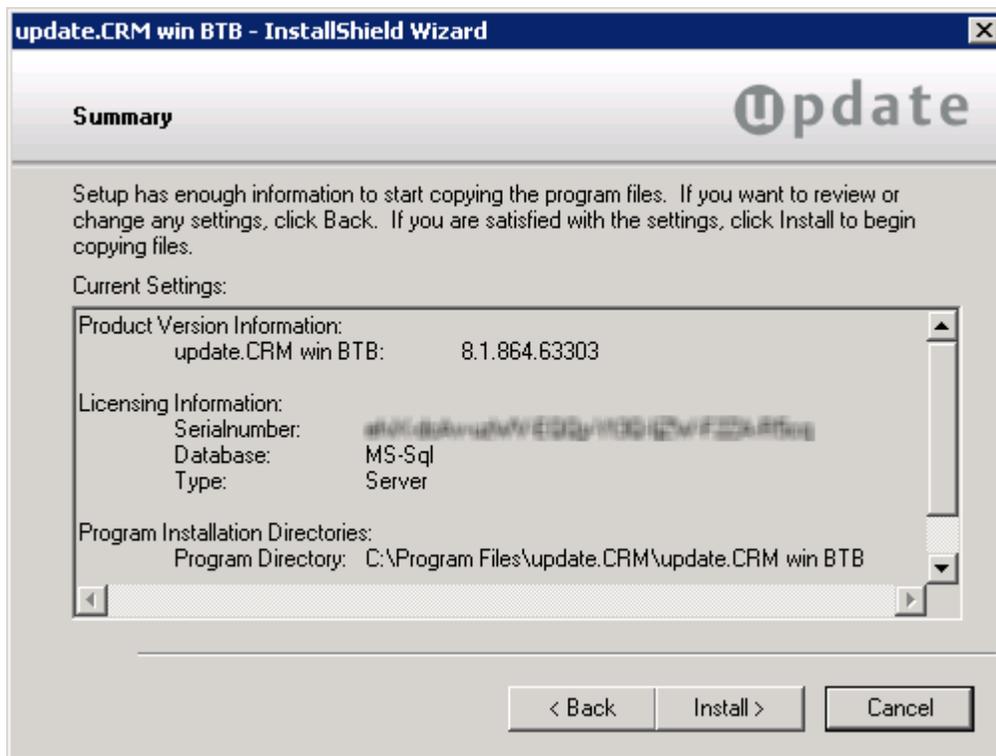
1. Verify your settings.
2. Click **Back** to change your settings. Click **Install** to start the installation process.

   Setup copies the program files to the directories you have specified. Your database connection settings are applied.

   Shortcuts are added to the Start menu.

Setup Complete

Learn how to complete installation of Aurea CRM win.
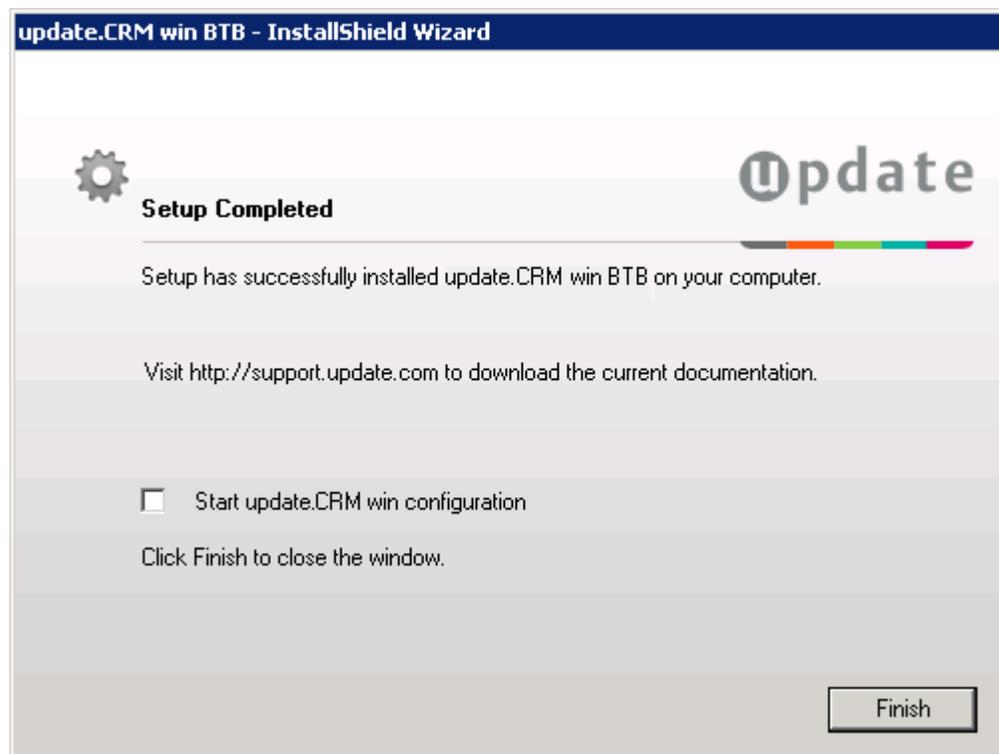
1. Check **Start Aurea CRM win configuration** to automatically start the Aurea CRM win **Configuration** module after finishing the setup, see Configuration on page 18. (If not, you are prompted to do so when starting any Aurea CRM win module.)

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

Download all documentation from https://support.aurea.com and make it available for your users: Copy the PDF files to the `..\Manuals` folder. Users can then open the appropriate manual via the **Help** menu in each Aurea CRM win module.

The online field help is available as an MS Excel file (downloadable from https://support.aurea.com as a ZIP package). To display the field help in Aurea CRM, you need to import the XLS using CRM.translation tool, see Importing Field Help in the *CRM.core Administrator Guide*.

For server installations you need to activate the serial number. If you have enabled the **Start Aurea CRM win configuration** check box, the activation process is started automatically, see Activating the Server Installation on page 25.

Configuration

The **Configuration** module is started once the installation has been completed or the first time an Aurea CRM module is started.

On server installations you are first prompted to activate your serial number, see Activating the Server Installation on page 25.

1. A login screen is displayed. Enter "SU"in the **Name** field and click **OK**.
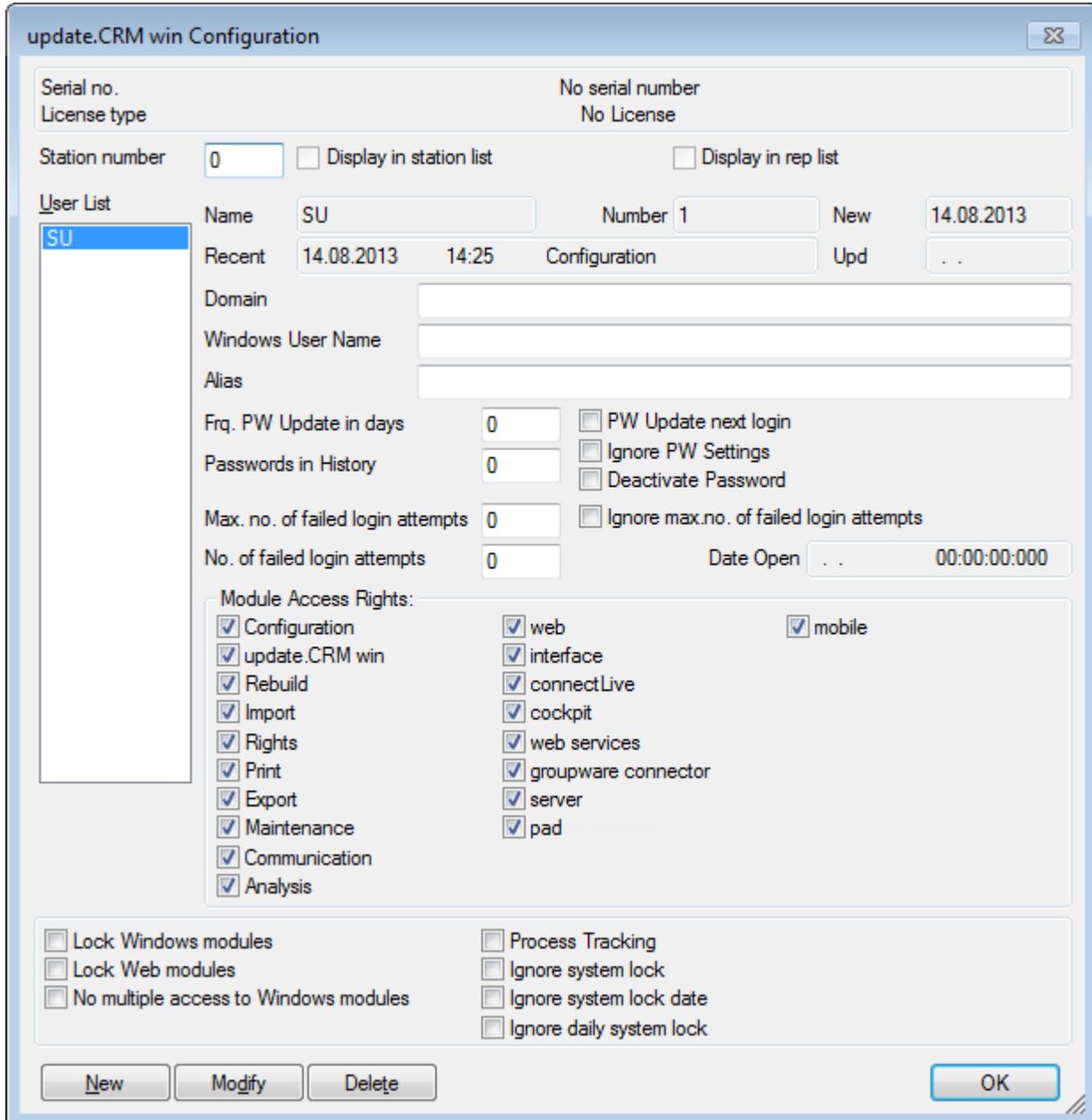
The **Users List** initially only contains the SU (supervisor) with the number 1.

Note: The SU is automatically assigned all possible access rights. Your first course of action should be to change the password for the SU, to prevent unauthorized access to the system.

2. Enter the number of the station in the **Station number** field.

   A station is a database instance managing Aurea CRM data. The station number is used to determine the origin of data stored in the system, define access rights etc., see Station in the *CRM.core Administrator Guide*.

3. Click **OK**.

Upgrading Aurea CRM win

Learn how to upgradeAurea CRM win.

To upgrade Aurea CRM win installation to the latest version, perform the following steps:

1. Unzip the installation package (`<vertical>_win_version_full.zip`) to a local drive. <vertical> can be BTB, FS, or OTC.

2. In the unzipped folder, double click `setup.exe`. The **Upgrade setup** wizard displays.
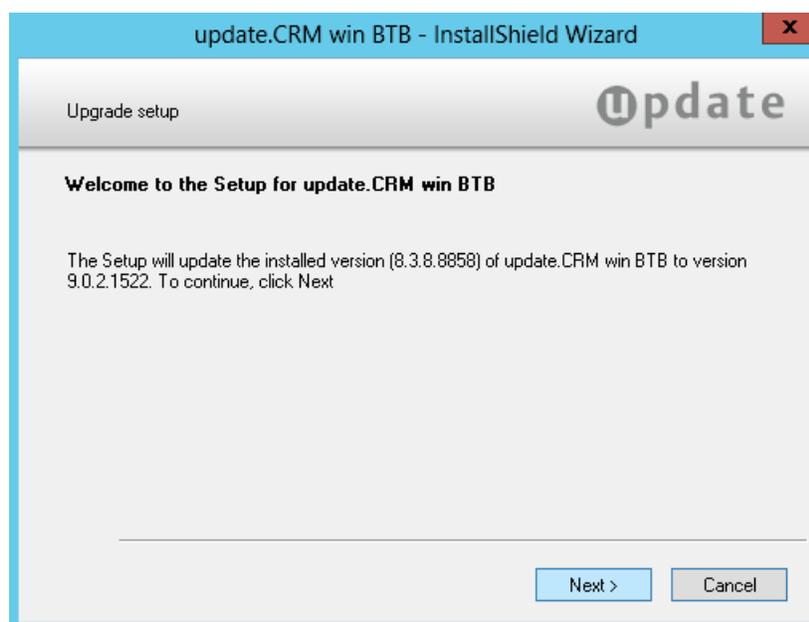
Note: This installation setup may require administrator rights.

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3. Click **Next** to start the upgrade process. The **Setup Status** window displays upgrade installation.
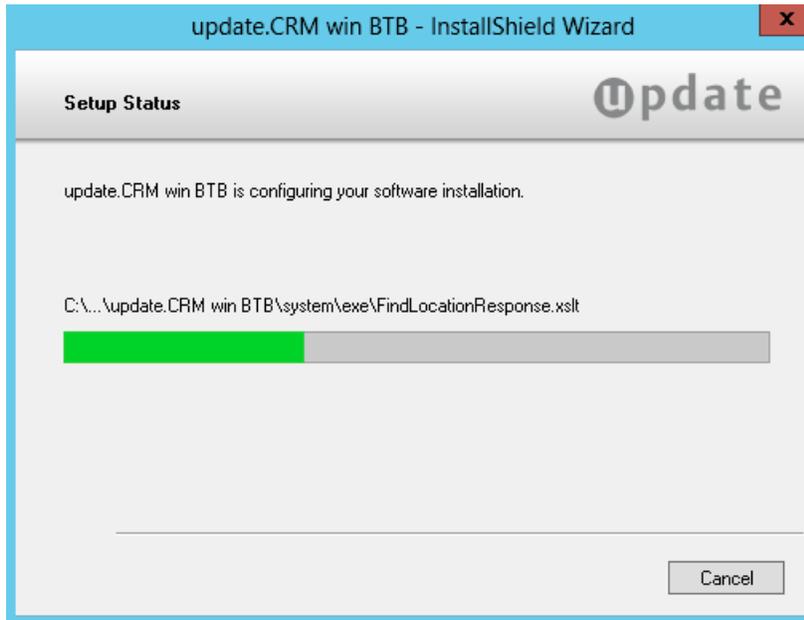
4. When the upgrade installation is complete, the **Update Complete** window displays.
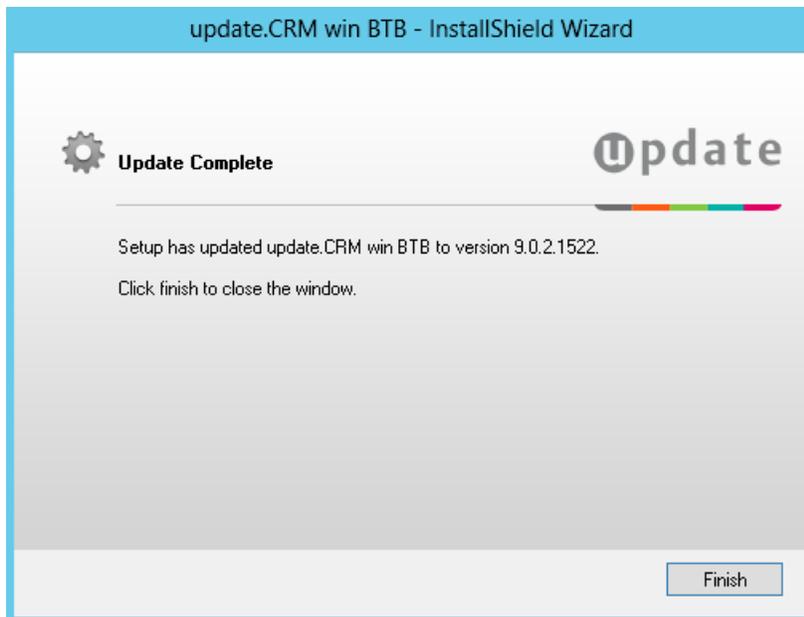
5. Click **Finish** to complete the upgrade installation.

Program Maintenance

Learn to subsequently change, repair or uninstall the installation of Aurea CRM win.

Follow the below steps:

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

2. Select the corresponding Aurea CRM win entry from the list.

3. Click on **Change/Remove**.
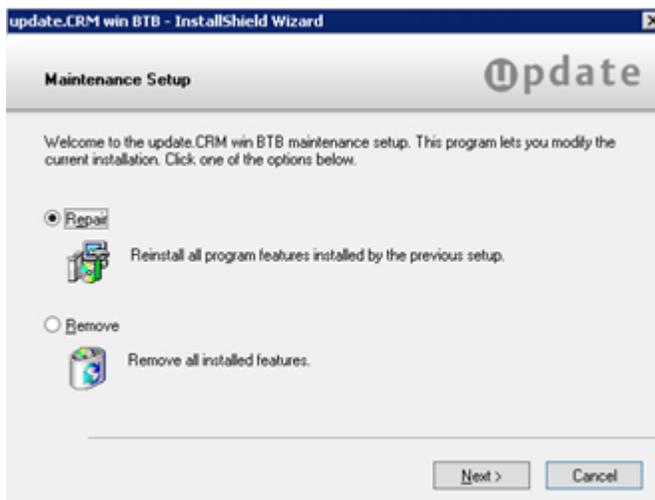
4. The **Program Maintenance** window is displayed:

   • Select **Repair** to repair the installation, see Repair.

   • Select **Remove** to uninstall Aurea CRM win, see Uninstalling Aurea CRM win on page 22.

5. Click **Next**.

Note: See the "Installing Hotfixes" document available from https://support.au-rea.com for details on installing hotfixes.

Repair

To repair your Aurea CRM win installation:

1. Start the program maintenance, see Program Maintenance on page 21.

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

Setup automatically installs all currently available languages.

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

Newly available languages are automatically installed in the course of hotfix installations, see Installing Hotfixes.

Uninstalling Aurea CRM win

Learn how to uninstall Aurea CRM win.

To uninstall Aurea CRM win:

1. Start program maintenance, see Program Maintenance.

2. Select **Remove**.

3. Click **Next**.

You are prompted whether you are certain you wish to remove all installed files.

4. Click **Yes**.

You have the following options:

- **Uninstall Aurea CRM win, delete the entire database and create a deactivation code**: The Aurea CRM win program files and Aurea CRM database are deleted and a deactivation code is issued. Use this option if a server installation is no longer required, e.g. a test system. The deactivation code enables you to re-use the serial number for another (new) server installation.

  Note: Aurea CRM win does not need to be deactivated for client installations.

  If you have not activated Aurea CRM win, or have not installed the database or the database connection correctly, no deactivation code is generated. In this case, always choose Uninstall Aurea CRM win without deleting the database, as the uninstall process is otherwise terminated.

- **Uninstall Aurea CRM win without deleting the database**: Only the Aurea CRM win program files are deleted and no deactivation code is issued. Use this option e.g. to re-install Aurea CRM win.

5. If you selected Uninstall Aurea CRM win, delete the entire database and create a deactivation code, you are prompted to enter the database credentials.
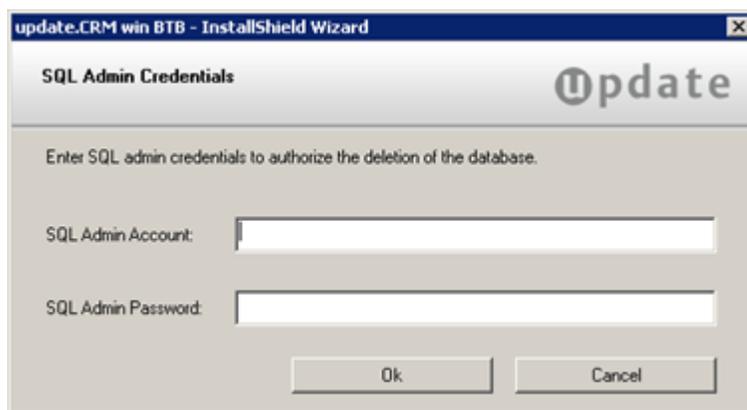
6. Click **OK** and confirm the prompt.

   Aurea CRM win is uninstalled.

7. Click Finish.

Deactivating a License for Installations without Setup

Note: Aurea recommends to **always** use the uninstall procedure provided by program maintenance mode, see

In case the setup files are corrupted or no longer available, you can deactivate a license via the command line:

1. Start `setup.exe` with the `--deactivatelicense=yes` parameter.

   This calls the **Deleting Database** dialog:

2. Specify the database connection and credentials and enter the serial number you want to reset.

3. Click **Delete**.

   A deactivation code is created and displayed in a message box.

4. Copy the deactivation code to the clipboard.

5. Click **OK**.

   The database is removed. (Aurea CRM win is not uninstalled by this procedure.)

3

Activating the Server Installation

Once the server installation is complete, you need to activate the serial number via the internet.

(If you enabled the Start Aurea CRM win configuration option at the end of the installation, the activation is started automatically.)

Note: Ensure that your server is connected to the internet in order to activate Aurea CRM. You do not need to activate client installations.

To activate Aurea CRM:

1. Start the Configuration module (`..\system\exe\mmcfg.exe`).
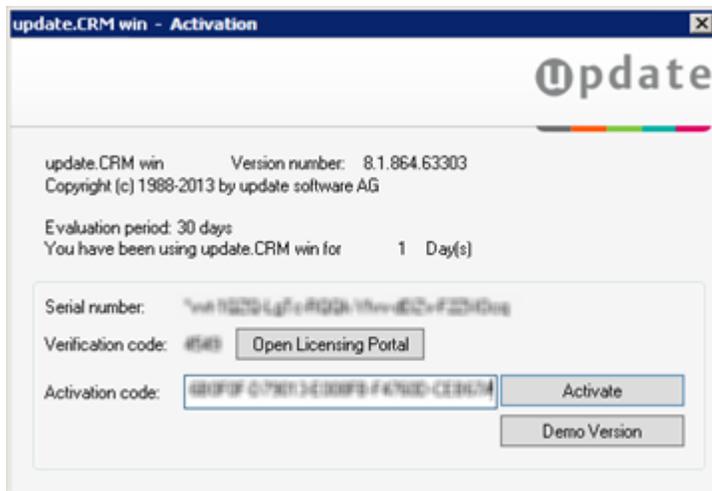
The activation dialog is opened displaying a 4-digit Verification code.

2. Click **Open Licensing Portal**.

   The Licensing portal requires a login which comes with your serial number.

3. Generate the activation code.

   For details on obtaining the activation code, see Activating the System in the Licensing Portal User Manual (located at the portal's login screen).

4. Paste the activation code into the respective field of the update.CRM Activation dialog.

5. Click Activate. (Click Demo Version to exit the dialog without activating Aurea CRM. Your installation is then handled as a 30 days trial version.)

A message appears informing you that the system has been configured successfully.
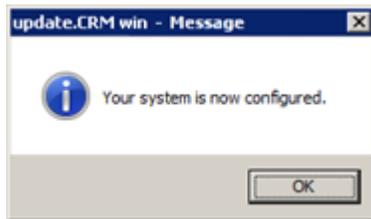
6. Click OK.

Aurea CRM is now activated. If you started the activation as part of the installation, the configuration module is now opened, see Configuration on page 18.

For further information on your license, see Aurea CRM License in the *CRM.core Administrator Guide.*

4

Troubleshooting

Learn how to troubleshoot issues during set up and installation.

If problems should occur during setup:

- Check that you are using one of the supported operating systems. A list of the system requirements can be found at https://support.aurea.com.

- Verify your serial number. Aurea recommends copying the serial number, user name and password for the activation as well as the activation code you receive using "copy + paste", in order to ensure you enter them correctly.

- Make sure that you are logged on with administrator privileges. Otherwise you cannot complete the setup successfully.

- If you have problems with your license (hard disk failure, locked license etc.) contact Aurea support at (support@aurea.com).

  Provide the following information:

  - A precise description of the problem

  - Your serial number and login data for the licensing portal

- If setup was aborted, data in your Windows registry or on the hard disk may prevent a new installation (in this case setup switches directly to the Maintenance Program). Try repairing your installation automatically, see Repair.

- Deviations from the standard installation procedure (manually copying the files instead of running setup on a new computer, using batch programs and the like) represent a change to the installation that is not covered by the maintenance agreement.

- If the Aurea CRM win program files are installed manually (i.e. without using the setup program), make sure to provide the "path" parameter when installing hotfixes. See the "Installing Hotfixes" document in https://support.aurea.com for details on installing hotfixes.

Note: Manual intervention should only occur on the part of system administrators, as errors could jeopardize your data and the functionality of Aurea CRM win. In general, the manipulation of automated processes is not covered by the maintenance agreement and is therefore not supported by Aurea.

5

CDB and PDB configurations

Oracle database considerations regarding CDB and PDB configurations

ACRM support oracle database as CDB and PDB.

Note: Oracle Database 12c and higher support PDB. CRM can be used with PDB on these versions

CDB is a DBA option allowing you to consolidate server use and management of databases. Applications are guaranteed to work with either PDB or non-CDB databases.

For further details, see https://docs.oracle.com/database/121/CNCPT/cd-bovrvw.htm#CNCPT89237.