

# Industry Solutions Installation Guide Version 14.1



## Notices

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## Preface

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, envi- ronment variable names, parameter names, command names, machine names, URLs.
Bold Fixed- width	<b>Bold Fixed-width</b> font is used to indicate user input or to emphasize certain lines of code.
Italic Fixed-width	<i>Italic Fixed-width</i> font indicates a placeholder for which you must supply a value.
Bold Sans serif	<b>Bold sans serif</b> typeface indicates the names of graphic user interface elements such as dialog boxes, buttons, and fields.
Italic serif	In text, <i>italic serif</i> typeface indicates the first use of an impor- tant 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 <b>File</b> > > <b>Exit</b> means: "Open the <b>File</b> menu and choose <b>Exit</b> ."
>>	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 athttps://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.

# **1** Supported Versions

Find the supported version for using industry solution templates.

To use the ISI, LSI or FSI Template V5, the following product versions or higher are required:

Aurea CRM win Version

9.1.1.16 - BTB, OTC, FS

- Aurea CRM web Version 9.1.1.16 – BTB, OTC, FS
- Aurea CRM cockpit Version

9.1.1.16 - BTB, OTC, FS

- Aurea CRM Template
  - ISI Cockpit Package: TE\_ISI\_9.1.1.16.zip
  - LSI Cockpit Package: TE\_LSI\_9.1.1.16.zip
  - FSI Cockpit Package: TE\_FSI\_9.1.1.16.zip

**Note:** The template package required for installation or upgrade is found inside the above packages. Ensure that you unzip the above zip files and use the TE\_<VERTICAL>\_package\_<Version>.zip when importing the package. For example, for the FSI vertical, the template package to import is "TE\_FSI\_package\_9.1.1.16.zip" and can be found when you unzip "TE\_FSI\_9.1.1.16.zip".

## **Basic Installation of Aurea CRM win/web**

Pre-requisite for importing a template package.

The basic installation of Aurea CRM win and web needs to be done before you can import a Template package. Please refer to these installation guides on how to do this:

- Aurea CRM win Installation Guide
- Aurea CRM web Installation Guide

# 2

## Install or Import the Template

Here you can learn how to install the product, upgrade the template and troubleshoot issues.

The template cockpit package includes the additional files (e.g. Jscript, XSLT etc.) compared to a standard web installation.

The topics are with the following abbreviations to give you a better overview:

- BS: Business Solutions
- OP: Operations

The Template package does not contain records in the text table (04) to improve the speed during the import of the cockpit packet. All translated template texts are saved in the data model. For information on how to translate your texts please follow the instructions in the customization guidelines.

#### Prerequisites (OP)

Basic win and web installation is done and running.

**Important:** Please make sure that you turned off all IIS application pools and services (CRM.server, Connector, etc.), associated with the application you want to upgrade.

### **Included Products**

Here you can find a list of the included products for industry solution.

The Template packages can be used for both initial and upgrade installations. The following products are included in the Template packages for your vertical:

Product	ISI	LSI/CG	FSI
Web	Х	Х	Х
CRM.pad / Mobile	Х	Х	
Web offline	Х	Х	
Connector SE for Exchange	Х	Х	Х

Product	ISI	LSI/CG	FSI
ConnectLive	Х	Х	
Connector for Domino			Х

# Import Template with cockpit (OP, BS: Info about Reps)

Learn how to install updated datamodel templates.

The station which you want to import needs to be configured as "Main Office" and "Aut.Cat.Maintenance".

Stat.No.	9001	Stat. Name	CU_DEV
Main Office	V	Aut.Cat.Maintenance	V

1. Start Aurea CRM cockpit, make sure to login in "**English**" if you have already configured other languages. You should be prompted with the following dialog:

Select Initial	Package
<ul> <li>Use existing import file</li> <li>Start with new package</li> </ul>	ОК

2. Select "Use existing import file".

**Note:** The template package required for installation or upgrade is found inside the TE\_<VERTICAL>\_<Version>.zip. Ensure that you unzip the above zip files and select the TE\_<VERTICAL>\_package\_<Version>.zip package to import.

**3.** Select the Template Package and continue. You are prompted with the following dialog, click "OK":



4. Configure the next settings dialog as per the below screenshot. Do not check 'Import catalog maintenance items'.

	Select Items to Import – 🗖 🗙
> Select Items Define Parameters First Phase Matchup Import Summary Import Second Phase Matchup Import Summary Import Third Phase Matchup Import Summary	Please select the items of the package you want to import into your update.CRM database.   Deploy web offline files     Core items (Catalogs, Formats, Info Areas, Records, Files from database)     Import catalog maintenance items (use this option for upgrade only)     Import field help items   Import field help items   Files from file system)
Import Summary Import Fourth Phase Matchup Import Summary Import Update CRM.designer Finished	Update CRM.designer  Synchronize changed or new catalogs  Synchronize only existing catalogs  Synchronize catalogs by default text and tenant no  Synchronize catalogs using the external key  Do not synchronize catalogs
Select All Deselect All	Next Cancel

The 'Aurea CRM.designer' option uses the same functionality as the bulkloader. By enabling this option cockpit automatically updates the CRM.designer database with the current datamodel, catalogs, CRM processes (R4) and roles (R2).

You can also choose the catalogs you want to synchronize (new or changed catalogs), only those catalogs can be synced that are already in the designer. So you can choose if you want cockpit to do it, or manually do it later using CRM.bulkloader.

٢	CRM.bulkloader
Data Model, CRM Processes Update designer database with current data	, Roles and Catalogs model, CRM processes, roles and catalogs.
Data Model CRM Processes and Roles Ca	talogs

Now you need to select the appropriate destinations for the following parameter paths.(These parameters contain files which are required by the template).

**Note:** The \$WEB parameter is mandatory. However, you can omit the \$TABLET and \$ADDON parameter, if you don't want to use these products. You can later import the cockpit package again and only import the missing parameters if you need these files (make sure to only check the box **Files (from file system)** in the previous step).

- \$WEB: This parameter contains all Template files which are needed for update.CRM. Use the web folder inside your installation directory, e.g. C:\update.CRM\update.CRM web BTB\web.
- \$TABLET: This parameter contains the tablet resources (images) which are required for CRM.pad. The files is extracted to the default tabletResources folder. Therefore, select the same folder as used for the \$WEB parameter.
- \$ADDON: This parameter contains all settings files which are needed for several add-on products, such as interface or connector. You can place these wherever you want, you need to copy and edit these files before you use them with the product. E.g. select your installation directory, C:\update.CRM\update.CRM web BTB.



If the button with the three dots is not visible, use the scrollbar at the bottom of the window to scroll to the right or make the window bigger in the bottom right corner. You can also paste your destination path into the second column.

		Define Par	ameter Path for Location of Files	
Select Items > Define Parameters First Phase	٩	Specify the path(s) to be u	sed by placeholders in file names to determine where	the files are stored.
Matchup		Parameter name:	Path in destination file system:	Select Destination Folder
Import Summary		\$WEB	C:\update.CRM\update.CRM web BTB\web	
Second Phase		\$TABLET	C:\update.CRM\update.CRM web BTB\web	
Matchup		\$ADDON	C:\update.CRM\update.CRM web_BTB	
Third Phase Matchup Import Summary Import Fourth Phase Matchup Import Summary Import Update CRM.designer Finished				
< <u>B</u> ack				Next Cancel

Now the matchup starts. You should always click "All from Package" if you are importing a Template. Subsequently, click on "Next". This matchup could start two more times depending on what you configured before. Be sure to select "All from Package" every time the matchup is started.

		Define Overwriting Items			- 🗆 ×
Select Items Define Parameters	(1) As both (import items and databas	se items) has been changed, please specify	which of the items shall overwri	te the others.	
> Matchup Import Summary	In Import Item Record Customer Productive (AS-	Matchup Package overwrites Database > V	n Database Item tecord CU Customer (AS-1)	By Matchup	Xml Difference
Second Phase Matchup		E			
Import Summary Import					
Matchup Import Summary					
Import Fourth Phase Matchup					
Import Summary Import					
Update CRM.designer Finished					
< Back		Next	All from Package All fr	om Database	Cancel

You now see an import summary. The template is imported after you click on "Start writing to Database".

The matchup now starts once again, be sure to check "All from Package"! It is also possible that an empty matchup window is opened and closed after a few seconds without user interaction. This is intentional as the matchup did not find any items which were altered in this phase.

When the import is finished you should get a success message.

	Impo	rt Summary		
Select Items Define Parameters	Please click 'Close' to finish the	mport.		
	Import result:	Success		
	Imported items (by type):			
	Record	852		
	Catalog	428		
	Format	489		
	Configurations	5		
	File	3		
	Directory	9		
	Field Help Records	11769		
	Field Help Dependent Records	26287		
	Imported items (by status):			
	Success	39481		
	None	361		
> Finished	Please click 'Close' to finish the impo	t.		
			CL	
			CR	Jse

## **Included Reps and Stations**

Here you can find the industry specific list of reps.

The package for ISI includes the following reps:

HTTPUSER (ID-1000100097) IMPORTuser (ID-1000100045) INTERFACE (ID-1000100103) Lotus Notes Connector User (ID-1000100220) Service User (for Exchange Connector) (ID-1000100081) SU (ID-1000100330) SU0001 (ID-1000100001) u8server (ID-1000100501) WWW User (ID-1000100331)

The package for LSI includes the following reps:

Arno Admin (0001) (ID-1000200186) Arno Admin (SU) (ID-00000001) Arno Catalogue (0001) (ID-1000200066) Arno Catalogue (9002) (ID-1000200067) Arno Catalogue (9002) (ID-1000200090) COM (ID-00000002) crmServer (1) (ID-1000200018) crmServer (9100) (ID-1000200017) crmServer (9200) (ID-1000200144) crmServer (9201) (ID-1000200147) HTTPUSER (ID-00000004) NCSU (ID-1000200086) OCSU (ID-1000200085) WWW (ID-000000003)

The package for FSI includes the following reps:

Admin, Arno (ID-100030002) Administration (ID-1000300016) COCKPIT (ID-1000300934) COM (ID-1000300899) OCSU (ID-1000300967) Service User (for Exchange Connector) (ID-1000300966) SU1 (ID-1000300550) U8Server(1) (ID-1000300978) U8SERVER(9100) (ID-1000300968) WWW (ID-1000300001)

Please make sure to change your passwords after you logged in as SU user!

#### Logins and passwords for ISI

Name	Login	Password	Offline Pass- word
СОМ	СОМ	com	com
u8server	U8SERVER	updateISI	updateISI
Exchange Connector User	OCSU	updateISI	updateISI
HTTPUSER	HTTPUSER	<no password<br="">set&gt;</no>	<no password<br="">set&gt;</no>
IMPORTuser	IMPORT	updateISI	updateISI

Name	Login	Password	Offline Pass- word
INTERFACE	INTERFAC	updateISI	updateISI
Lotus Notes Connector User	NCSU	updateISI	updateISI
Service User (for Exchange Connector)	SERVMAIL	<no password<br="">set&gt;</no>	<no password<br="">set&gt;</no>
SU	SU	<no password<br="">set&gt;</no>	updateISI
SU0001	SU0001	<no password<br="">set&gt;</no>	updateISI
WWW	WWW	<no password<br="">set&gt;</no>	updateISI

#### Logins and passwords for LSI

Name	Login	Password	Offline Password
Arno Admin (0001)	SU0001	<no password<br="">set&gt;</no>	<no password<br="">set&gt;</no>
Arno Admin (SU)	SU	<no password<br="">set&gt;</no>	updateLSI
Arno Catalogue (0001)	SUKA0001	<no password<br="">set&gt;</no>	<no password<br="">set&gt;</no>
Arno Catalogue (9001)	SUKA9001	<no password<br="">set&gt;</no>	<no password<br="">set&gt;</no>
Arno Catalogue (9002)	SUKA9002	<no password<br="">set&gt;</no>	<no password<br="">set&gt;</no>
СОМ	СОМ	<no password<br="">set&gt;</no>	<no password<br="">set&gt;</no>
crmServer (1)	TASK0001	<no password<br="">set&gt;</no>	<no password<br="">set&gt;</no>
crmServer (9100)	TASK9100	<no password<br="">set&gt;</no>	<no password<br="">set&gt;</no>

Name	Login	Password	Offline Password
crmServer (9101)	TASK9101	<no password<br="">set&gt;</no>	<no password<br="">set&gt;</no>
crmServer (9200)	TASK9200	<no password<br="">set&gt;</no>	<no password<br="">set&gt;</no>
crmServer (9201)	TASK9201	<no password<br="">set&gt;</no>	<no password<br="">set&gt;</no>
HTTPUSER	HTTPUSER	updateLSI	updateLSI
NCSU	NCSU	updateLSI	<no password<br="">set&gt;</no>
OCSU	OCSU	updateLSI	<no password<br="">set&gt;</no>
u8server	U8SERVER	<no password<br="">set&gt;</no>	<no password<br="">set&gt;</no>
WWW User	WWW	<no password<br="">set&gt;</no>	updateLSI

#### Logins and passwords for FSI

Name	Login	Password
Admin, Arno	SU	<no password="" set=""></no>
Administration	<groupright></groupright>	
COCKPIT	COCKPIT	<no password="" set=""></no>
СОМ	СОМ	com
ocsu	OCSU	<no password="" set=""></no>
Service User (for Exchange Connector)	SERVMAIL	<no password="" set=""></no>
SU1	SU1	<no password="" set=""></no>
u8server	U8SERVER	<no password="" set=""></no>
U8Server(1)	TASK1	<no password="" set=""></no>

Name	Login	Password
U8Server(9100)	TASK9100	<no password="" set=""></no>
WWW	WWW	<no password="" set=""></no>

## **Included Designer Configurations**

This topic lists the designer configurations included in the Cockpit package.

The following table shows the Designer Configurations that are included in the Cockpit Package:

ISI web	TE_CORE TE_ISI CU_Customer
ISI CRMpad	TE_ISI_TABLET CU_ISI_TABLET
LSI/CG web	TE_CORE TE_LSI XX_LSI_Country_Customer TE_LSI_Marketing TE_LSI_RxSales TE_LSI_KeyAccountManagement TE_LSI_Base TE_ LSI_Management TE_LSI_Service TE_LSI_OTCSALES TE_CONSUMERGOODS
LSI/CG CRMpad	TE_LSI_tablet TE_CG_tablet
FSI web	TE_CORE TE_FSI

#### Aurea CRM win – CRM Process Configuration (BS)

**Note:** This step is only necessary for ISI and FSI business solutions. LSI is using B4 records to control the CRM process configuration.

To ensure that the correct process configuration is loaded please go into the Rights module and load the "TE\_ProcessConfiguration\_Global" process configuration.

(a) update.CRM win - Rights - Super	User - [CRM Process Configuration]					—	
0 <u>F</u> ile <u>E</u> dit <u>V</u> iew <u>D</u> ata <u>I</u> nfo	🕐 File Edit View Data Info Extras Window Help						
Opdate	00000						
Gpoote							
<u>CRM Process Configuration</u>	🎬 CRM Proces 🖋 🗷 🖻 🛱	// 😂 🖻					
Login role	Load					×	
🗾 Language	CRM process configuration (login role)						
<u>S</u> tation	Name TE ProcessConfiguration Global					Total : 13	
<u>В</u> ер							
<b><u>Rep hierarchy</u></b>							
Hierarchy Change	Name 🗵	Created on	Updated on	User	Lock	Private ^	
Rights	TE_ProcessConfiguration_Administration TE_ProcessConfiguration_Analytics	01/30/2017 01/30/2017	01/30/2017 01/30/2017	SU SU			
<b>D</b> <u>T</u> riggers	TE_ProcessConfiguration_Global	01/30/2017 01/30/2017	02/08/2017 01/30/2017	SU SU			
Tenant	TE_ProcessConfiguration_KeyAccountM	01/30/2017	01/30/2017	SU	吕		
International Tenant Rights	TE_ProcessConfiguration_LightOser	01/30/2017 01/30/2017 01/30/2017	01/30/2017 01/30/2017 01/30/2017	SU SU	Ä	H ↓	
Station configuration	<					>	
System Lock	Delete	Create Backup	Restore Orig	ginal	Lock	Private	
Ser Tracking					OK	Cancel	
Session Tracking	::L						

#### Aurea CRM win – Configuration (MC) (BS)

The configuration records are delivered without a station number.

#### LSI&CG

The following records are delivered without a station number and can be considered as an example configurations. They have an effect on your customer's station. Changes to these records are not overwritten by a template upgrade.

Category	Option	ID
Data Model	Reference Text	(MC-10002-10)
General Set- tings	Connection Settings for SMTP	(MC-10002-25)

Category	Option	ID
General Set- tings	E-mail Client	(MC-10002-8)
General Set- tings	Title bar	(MC-10002-18)
Geo-coordi- nates	Active in the following modules	(MC-10002-56)
Geo-coordi- nates	Geolocation handler	(MC-10002-34)
Geo-coordi- nates	Geolocation handler	(MC-10002-35)
Geo-coordi- nates	Geolocation handler	(MC-10002-37)
Geo-coordi- nates	Geolocation handler	(MC-10002-38)
Geo-coordi- nates	Geolocation handler	(MC-10002-40)
Geo-coordi- nates	Geolocation handler	(MC-10002-41)
Geo-coordi- nates	Geolocation handler	(MC-10002-46)
Geo-coordi- nates	Geolocation handler	(MC-10002-47)
Listing	Inheritance - Serial Input	(MC-10002-23)
Listing	Inheritance	(MC-10002-22)
Triggers	Log triggers	(MC-10002-3)
Word processor	Document Types	(MC-10002-16)
Workflow	Log workflows	(MC-10002-9)

#### Calendar >> Holidays

There are no MC-records delivered with Category: Calendar and Option: Holidays in the LSI & CG Business solution.

The XML files containing the default calendar definitions are located at  $..\system\xml\Calendars$ . For more information please look at the CRM.core Administrator Guide.

update.CRM win - Variables (Z5/Z6) (BS)

#### Aurea CRM win – Variables (Z5/Z6) (BS)

Variables are used to configure different parts of the template.

The values of the variables are delivered without a station number!

Variable: TE_OppMgmt_`	Y1Parti 🕲 🕲 😋 🕼	) • ¥ V X 🗄 🛛 🖛 🛃 2				
Name	🛆 Info Area	Field Name	Lock	Z5_TenNo		
TE_OppMgmt_Y1Activities_Level2	Opportunity	CountMA				
TE_OppMgmt_Y1Activities_Level4	Opportunity	CountMA_StateCom				
TE_OppMgmt_Y1Activities_Level5	Opportunity	CountMA_LinktoPR				
TE_OppMgmt_Y1Competitor_Level3	Opportunity	CountY3				
TE_OppMgmt_Y1Evaluation_Level3	Opportunity	CountY3				
TE_OppMgmt_Y1Offer_Level5	Opportunity	CountPR_StateSent			-	
TE_OppMgmt_Y1Participants_Decider_Level4	Opportunity	CountY2_Decider				no station number
TE_OppMgmt_Y1Participants_Level2	Opportunity	CountY2				
TE_OppMgmt_Y1Participants_Level4	Opportunity	CountY2				
TE_OppMgmt_Y5Product_Level3	Opportunity	CountY5				
🐑 Variable Value	00000	001101180 <b>=</b> 45				
Var. Text	Var. Number/Catalog	Var. Date	Var. Tin	ne (s)	Stat. No. 🗡	
		1				

Therefore all values are valid for all stations!

There are two possibilities to define project-specific variable values:

- Change the variable value which is delivered by the template the record is not updated with the next upgrade.
- Create a new variable value for your station number.

Please also define the correct tenant.

#### **Corporate Currency variable**

The corporate currency feature is activated and has some default values out-of-thebox.

Name	Indate CorporateCurrency	
Description	public_corporatedancity	
Info Area	Exchange Rate	
Field Name	Currency	
Туре		Lock
ariable Value 🛭 🕲	●●●●■ ● ■ ▲ ●	Sorted by: Vi
76 TenNo		
Stat. No.		
Rep Group ID		
Rep ID		
Language No.		
Login role		
Country		
ndition for info area		
Default		
Var. Text		
Var. Number/Catalog	2 EUR	
Var. Rep ID		
Var. Date		
Var. Time (s)		
Var. Decimal		
Var. Logical		
Link		

Whether you want to use this feature or not should be defined in the beginning of a project. For more information please check out the template's technical documentation.

#### Aurea CRM win – Language Configuration (only Necessary for LSI&CG) (BS)

After the installation is complete the parent language for CU is empty. You have to configure the CU\_languages for your project. Dependent on LSI or CG you have to configure different parent languages. For LSI projects you need languages based on 100. For CG projects you need languages based on 200.

(	🖻 Language		۲	8	9 0	• • * * × *	<b>i () = 4</b> i i
	Language Lang.(Text)	Lang.(Cat.)	Lang. (upda	Cata	Cata	Parent Language No	Parent Language
	1 TE_BASE			Y	Y		
	2 TE_Docu			N	Ν		
	3 TE_Pool (OneKey)			Y	Ν		
	100 TE_German_LSI	German (BASE)	German	Y	Ν		
	101 TE_English_LSI	English (BASE)	English	Y	Ν		
	102 TE_French_LSI	French (BASE)	French	Y	Ν		
	103 TE_Spanish_LSI	Spanish (BASE)	Spanish	Y	Ν		
	105 TE_Dutch_LSI	Dutch (BASE)	Dutch	Y	Ν		
	107 TE_Italian_LSI	Italian (BASE)	Italian	Y	Ν		
	123 TE_Japanese_LSI	Japanese (BASE)	Japanese	Y	N		
	200 TE_German_CG	German (BASE)	German	Y	Ν	10	0 TE_German_LSI
	201 TE_English_CG	English (BASE)	English	Y	Ν	10	1 TE_English_LSI
	202 TE_French_CG	French (BASE)	French	Y	Ν	10	2 TE_French_LSI
	203 TE_Spanish_CG	Spanish (BASE)	Spanish	Y	Ν	10	3 TE_Spanish_LSI
	205 TE_Dutch_CG	Dutch (BASE)	Dutch	Y	Ν	10	5 TE_Dutch_LSI
	207 TE_Italian_CG	Italian (BASE)	Italian	Y	N	10	7 TE_Italian_LSI
	223 TE_Japanese_CG	Japanese (BASE)	Japanese	Y	Ν	12	3 TE_Japanese_LSI
Þ	1000 CU_German	German (BASE)	German	Y	Ν 🌈		
	1001 CU_English	English (BASE)	English	Y	N		
	1002 CU_French	French (BASE)	French	Y	N		
	1003 CU_Spanish	Spanish (BASE)	Spanish	Y	N		
	1005 CU_Dutch	Dutch (BASE)	Dutch	Y	N		
	1007 CU_Italian	Italian (BASE)	Italian	Y	N		
	1023 CU_Japanese	Japanese (BASE)	Japanese	Y	N		

#### Example LSI Project

🧮 Language	00		🛍 🛛 🕅 🛢	🕘 📾 🛃 🗟		
Language Lang.(Text)	* Lang.(Cat.)	Lang. (upd	la Catalog Lan	g Catalog Base Lang.	Parent Language No.	Parent Language
1 TE_CATALOG_BASE_LANG	i		Y	Y		
2 TE_Docu			N	N		
3 TE_Pool (OneKey)			Y	N		
100 TE_German_LSI	German	German	Y	N		
101 TE_English_LSI	English	English	Y	N		
102 TE_French_LSI	French	French	Y	N		
103 TE_Spanish_LSI	Spanish	Spanish	Y	N		
105 TE_Dutch_LSI	Dutch	Dutch	Y	N		
107 TE_Italian_LSI	Italian	Italian	Y	N		
123 TE_Japanese_LSI	Japanese	Japanese	Y	N		
1000 CU_German	German	German	Y	N	100	TE_German_LSI
1001 CU_English	English	English	Y	N	101	TE_English_LSI
1002 CU_French	French	French	Y	N	102	TE_French_LSI
1003 CU_Spanish	Spanish	Spanish	Y	N	103	TE_Spanish_LSI
1005 CU_Dutch	Dutch	Dutch	Y	N	105	TE_Dutch_LSI
1007 CU_Italian	Italian	Italian	Y	N	107	TE_Italian_LSI
1023 CU_Japanese	Japanese	Japanese	Y	N	123	TE_Japanese_LSI

### Example CG Project

🗏 Language	000		1 I X 🖩	5 🔮 📾 🌔		
Language Lang.(Text)	* Lang.(Cat.)	Lang. (upda	Catalog Lang	Catalog Base Lang.	Parent Language No.	Parent Language
1 TE_CATALOG_BASE_LANG			Y	Y		
2 TE_Docu			N	N		
3 TE_Pool (OneKey)			Y	N		
200 TE_German_CG	German	German	Y	N	100	TE_German_LSI
201 TE_English_CG	English	English	Y	N	101	TE_English_LSI
202 TE_French_CG	French	French	Y	N	102	TE_French_LSI
203 TE_Spanish_CG	Spanish	Spanish	Y	N	103	TE_Spanish_LSI
205 TE_Dutch_CG	Dutch	Dutch	Y	N	105	TE_Dutch_LSI
207 TE_Italian_CG	Italian	Italian	Y	N	107	TE_Italian_LSI
223 TE_Japanese_CG	Japanese	Japanese	Y	N	123	TE Japanese LSI
1000 CU_German	German	German	Y	N	200	TE_German_CG
1001 CU_English	English	English	Y	N	201	TE_English_CG
1002 CU_French	French	French	Y	N	202	TE_French_CG
1003 CU_Spanish	Spanish	Spanish	Y	N	203	TE_Spanish_CG
1005 CU_Dutch	Dutch	Dutch	Y	N	205	TE_Dutch_CG
1007 CU_Italian	Italian	Italian	Y	N	207	TE_Italian_CG
1023 CU_Japanese	Japanese	Japanese	Y	N	223	TE_Japanese_CG

#### Aurea CRM win – Tenant Configuration (BS)

The template includes tenant 1 as a sample value for your customer. Tenant 1 has tenant 9000 as additional tenant. In ISI and FSI projects it is enough if you can see the template tenant 9000 in addition.

In LSI & CG projects you have to add tenant 9004 or 9005 depending on whether you are using an LSI or CG project.

#### **Example LSI Project**

Add additional tenant 9004 for LSI projects.

	📑 Tenant	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$
	Tenant'ilo Tenant Name * Tenant Rights	Text
►	1 Customer TE_TR_Template Main - LSI	sample value for customers
	9000 TEMPLATE MAIN - LSI&CG TE_TR_Template Main - LSI	TEMPLATE MAIN data for LSI and CG (catalog values, data used in template, can be seen
	9002 TEMPLATE - OneKey-LSI TE_TR_Template Main - LSI	TEMPLATE: One-Key pool interface. Used as additional tenant
	9004 TEMPLATE MAIN - LSI TE_TR_Template Main - LSI	TEMPLATE MAIN data for LSI (catalog values, data used in template - RELEASED!)
	9005 TEMPLATE MAIN - CG TE_TR_Template Main - LSI	TEMPLATE MAIN data for CG (catalog values, data used in template - RELEASED!)
Į	🧃 Additional Tenant 💙	© © © © © ≌ ⊡ ₫ ⊡ ≝ ≅ ≡ ∉ ≅
Γ	M2_TenNo Add.Tenant Name	
	9000 TEMPLATE MAIN - LSI&CG	
Þ	9004 TEMPLATE MAIN - LSI	

#### **Example CG Project**

Add additional tenant 9005 for CG projects.

8	🚦 Tenant	0 0 0 0 0 0 1 V J 🖩 💿 🖷 🐔 B
	Tenant in Tenant Name * Tenant Righ	nts Text
	1 Customer TE_TR_Templa	ate Main - LSI sample value for customers
	9000 TEMPLATE MAIN - LSI&CG TE_TR_Templa	ate Main - LSI TEMPLATE MAIN data for LSI and CG (catalog values, data used in template, can be
	9002 TEMPLATE - OneKey-LSI TE_TR_Templa	ate Main - LSI TEMPLATE: One-Key pool interface. Used as additional tenant
	9004 TEMPLATE MAIN - LSI TE_TR_Templa	ate Main - LSI TEMPLATE MAIN data for LSI (catalog values, data used in template - RELEASED!)
	9005 TEMPLATE MAIN - CG TE_TR_Templa	ate Main - LSI TEMPLATE MAIN data for CG (catalog values, data used in template - RELEASED!)
Z	Additional Tenant	<b>0 0 0 0 0 1</b> 0 1 8 8 8 8 5
	M2_TenNo Add.Tenant Name	
	9000 TEMPLATE MAIN - LSI&CG	
	9005 TEMPLATE MAIN - CG	

#### Aurea CRM web – settings.xml (OP)

In the web package you find a sample file settings\_Example.xml which includes all necessary template changes.

Please replace your settings.xml with the provided settings\_Example.xml which is located in

...\web\system\settings. Also ensure that you provide the correct connection string in your new settings.xml.

The template.dll file has been added as a plugin in ISI, LSI and FSI:

Virtual TFI1, TPR1, TPR2 and TPR3 info areas have been added in the ISI set-tings.xml:

```
<VirtualSchema>
   < -- ISI-TEMPLATE Virtual Infoareas must start with "T..." ! -->
   <!-- Company Competitor FI -->
   <InfoArea infoAreaId='TFI1' physicalInfoAreaId='FI' name='Competitor' fieldId='167'</pre>
         fieldType='K' value='Competitor (BASE) ' tenantNo='9000'/>
   <!-- Offer Types PR -->
   <InfoArea infoAreaId='TPR1' physicalInfoAreaId='PR' name='Service Contract Offer'</pre>
   fieldId='5029' fieldType='K' value='Service Contract Offer (BASE)' tenantNo='9000'/>
   <InfoArea infoAreaId='TPR2' physicalInfoAreaId='PR' name='Service Offer'
   fieldId='5029' fieldType='K' value='Service Offer (BASE)' tenantNo='9000'/>
   <InfoArea infoAreaId='TPR3' physicalInfoAreaId='PR' name='Service Report'</pre>
   fieldId='5029' fieldType='K' value='Service Report (BASE)' tenantNo='9000'/>
   <!-- CUSTOMER Virtual Infoareas must start with "V..." as described in the infoletter
   -->
   <!-- DEFINE your customer virtual infoareas here: e.g.: <InfoArea infoAreaId='V...'
   physicalInfoAreaId='' name='' fieldId='' fieldType='' value='' tenantNo=''/> -->
</VirtualSchema>
```

#### Aurea CRM web – web.config (OP)

- The file ...\web\web\_Example.config includes all necessary changes for the ISI template.
- Rename file ...\web\web Example.config to web.config.

The te.bin folder has been added:

8	þ	<runtime></runtime>
9	_ ⊨	<assemblybinding xmlns="urn:schemas-microsoft-com:asm.v1"></assemblybinding>
10		<probing privatepath="bin;te.bin;system"></probing>
11	-	
12	-	

#### Aurea CRM web – custom-color.css (BS, OP: deploying the file)

- With the file ... \web\styles\te.base\custom-color\_Example.css you can use your own color scheme for update.CRM web.
- Rename the file ... \web\styles\te.base\custom-color\_Example.css to custom-color.css.

#### Aurea CRM web – Application Pool Settings (OP)

Please be sure to configure your application pool like the following screenshot:

1	(c			
	(General)			
	NET Framework Version	v4.0		
	Enable 32-Bit Applications	False		
	Managed Pipeline Mode	Integrated		
1	Name	ISI_WEB		
	Queue Length	1000		
	Start Automatically	True		
-	СРИ			
	Limit	0		
	Limit Action	NoAction		
	Limit Interval (minutes)	5		
	Processor Affinity Enabled	False		
	Processor Affinity Mask	4294967295		
-	Process Model			
	Identity	NetworkServi	ce	
	Idle Time-out (minutes)	20		
	Load User Profile	False		
	Maximum Worker Processes	1		
	Ping Enabled	True		
	Ping Maximum Response Time (second	90		
	Ping Period (seconds)	30		
	Shutdown Time Limit (seconds)	90		
	Startup Time Limit (seconds)	90		
-	Process Orphaning			
	Enabled	False		
	Executable			
	E			

Now start the web. You should see the login screen for the user:



#### Aurea CRM designer (OP)

To synchronize the designer datamodel with the current CRM.core datamodel please start the update.CRM bulkloader located in ... <code>\update crm web\design-er\database</code>.

😑 update CRMbulkloader		
Upload, Download or Maintenance? Select the desired operation.		<b>O</b> pdate
<ul> <li>Select the desired operation.</li> <li>Upload data into the designer database The data contained in XML files will be uploaded into the designer</li> <li>Download data from the designer database The data contained in the tables of the designer database will be</li> <li>Maintenance Create or upgrade the designer database.</li> <li>Data Model, CRM Processes, Roles and Catalogs Update designer database with current data model, CRM process</li> </ul>	database. downloaded and stored in XML files es, roles and catalogs.	Gruate
▼ Save program settings	< Back Next >	Exit

Please provide your SU user credentials and the address to your web service. In case you are using RAS, please provide your RAS login credentials. The language you select here is the language that the fields are displayed in the designer, e.g. if you select **eng**, then the fields in the Designer is displayed in English:

update CRMb	ulkloadér		
Jpdate CF .ogin to update	<b>RM Login</b> CRM		<b>O</b> pdate
Login			
User name:	su	🗖 Single Sign-In	
Password:			
Language:	eng 💌	]	
update CRMd	esigner Web Service URL:		
http://localho			
			Text
		/ Back	Next > Evit
J.2514.55425		L DOCK	

1. Click Next. The Data Model, CRM Processes, Roles, and Catalogs dialog displays.

🥏 update CRMbulkloader		
Data Model, CRM Processes, Roles and Catalo Update designer database with current data model, CRM processes, ro	<b>DGS</b> les and catalogs.	<b>O</b> pdate
Data Model Processes and Roles Catalogs		
I hill temporary tables only (does not update the designer database)		pdate Data Model
V8.0.2514.55425	< <u>B</u> ack	<u> </u>

- 2. Select the Data Model tab and click Update Data Model.
- 3. Select the Processes and Roles tab. Check all radio buttons.

💿 update CRMbulkloader		
Data Model, CRM Processes, Roles and Catalo Update designer database with current data model, CRM processes, rol	<b>9gs</b> es and catalogs.	<b>O</b> pdate
Data Model Processes and Roles Catalogs		
all      only processes      O only roles		
Fill temporary tables only (does not update the designer database)		<u>U</u> pdate
V8.0.2514.55425	< <u>B</u> ack	<u> </u>

4. Click Update.

#### Aurea CRM designer – Languages (BS)

As the CRM sub-language is not transported with the cockpit package and is filled with '0', please insert the corresponding CU language which is used in the CRM sub-language as shown below.

• ISI:

U Global Language Settings						
artp	age	Language Settings				
Glo	bal	Language Settings				
	Id	Language	Active	CRM Language	CRM Sub- Language	Parent Language
×	1	German	~	0	1000	~
×	2	English	~	1	1001	~
×	3	Dutch	~	5	1005	~
×	4	French	~	2	1002	~
×	5	Czech	~	8	1008	¥
×	6	Hungarian	~	9	1009	¥
×	7	Polish	~	11	1011	¥
×	8	Spanish	~	3	1003	~
×	9	Croatian	~	20	1020	~
×	10	Danish	~	6	1006	~
×	11	Finnish		17	1017	~
×	12	Italian	$\checkmark$	7	1007	~
×	13	Norwegian		18	1018	~
×	14	Portuguese		4	1004	~
×	15	Romanian	~	22	1022	~
×	16	Russian	~	15	1015	~
×	17	Slovak	~	10	1010	~
×	18	Slovenian	~	14	1014	~
×	19	Swedish	~	16	1016	~
×	20	Chinese	~	24	1024	~
×	21	Japanese	~	23	1023	~
×	22	Bulgarian	~	26	1026	~
×	23	Greek		12	1012	~
×	24	Korean	~	25	1025	~
×	25	Serbian		21	1021	~
×	26	Turkish		19	1019	~

#### • LSI:

For LSI projects you have to enter the CU\_Language number (1000) as CRM sub-language in the designer's Global Language Settings.

Glo	Global Language Settings *						
🗸 s	/ Save						
	Id	Language	Active	CRM Language	CRM Sub- Language	<sup>9</sup> arent Language	
×	1	German	$\checkmark$	0	1000	~	
×	2	English	>	1	1001	~	
×	3	French	>	2	1002	~	
×	4	Italian	>	7	1007	~	
×	5	Spanish	>	3	1003	~	
×	8	Dutch	$\checkmark$	5	1005	~	

#### • CG:

For CG projects you have to enter the **CU\_Language number (1000)** as **CRM sub-language** in designer's **Global Language Settings** into the CG languages. The parent language doesn't change.

Gloł	bal	Language Settings *					
🗸 s	ave						
	Id	Language	Active	CRM Language	CRM Sub- Language	Parent Langua	age
×	1	German	~	0	100		¥
×	2	English	$\checkmark$	1	101		¥
×	3	French	~	2	102		×
×	4	Italian	~	7	107		¥
×	5	Spanish	~	3	103		¥
×	8	Dutch	~	5	105		¥
×	9	Czech		8	0		¥
×	10	Hungarian		9	0		×
×	11	Polish		11	0		×
×	12	Croatian		20	0		×
×	13	Danish		6	0		×
×	14	Finnish		17	0		×
×	15	Norwegian		18	0		×
×	16	Portuguese		4	0		×
×	17	Romanian		22	0		×
×	18	Russian		15	0		۷
×	19	Slovak		10	0		۷
×	20	Slovenian		14	0		۷
×	21	Swedish		16	0		۷
×	22	Chinese		24	0		۷
×	23	Japanese		23	0		¥
×	24	German_CG	~	0	1000	German	¥
×	25	English_CG	~	1	1001	English	¥
×	26	French_CG	~	2	1002	French	¥
×	27	Italian_CG	~	7	1007	Italian	¥
×	28	Spanish_CG	$\checkmark$	3	1003	Spanish	¥

#### • FSI:

/ s	ave					
	Id	Language	Active	CRM Language	CRM Sub- Language	Parent Language
×	1	German	~	0	1000	~
×	2	English	×	1	1001	~
×	3	Czech	×	8	1008	~
×	4	Dutch	~	5	1005	~
×	5	Spanish	~	3	1003	~
×	6	Italian	~	7	1007	~
×	7	Danish	~	6	1006	~
×	8	French	~	2	1002	~
×	9	Greek	×	12	1012	~
×	10	Romanian	×	22	1022	~
×	11	Slovak	~	10	1010	~
×	12	Polish	×	11	1011	~
×	13	Hungarian	×	9	1009	~
×	14	Japanese	×	23	1023	~
×	15	Bulgarian	×	26	1026	~
×	16	Chinese	~	24	1024	~
×	17	Croatian	~	20	1020	~
×	18	Finnish	~	17	1017	~
×	19	Korean	~	25	1025	~
×	20	Norwegian	~	18	1018	~
×	21	Portuguese	~	4	1004	~
×	22	Russian	~	15	1015	~
×	23	Serbian	~	21	1021	~
×	24	Slovenian	~	14	1014	~
×	25	Swedish	~	16	1016	~
×	26	Turkish	~	19	1019	~
+		New language name	~			~

Congratulations, you have successfully installed the template!

#### Aurea CRM designer – Customer Configurations (BS)

Starting from version 6 of the template, we are not delivering the customer configurations anymore. Please make sure that you create these configurations and customize them. The configurations for the respective verticals should be named are listed below:

#### ISI:

- CU\_Customer (child if TE\_ISI)
- CU\_ISI\_TABLET (child of TE\_ISI\_TABLET)

#### FSI:

• CU\_Customer (child of TE\_FSI)

→ Congratulations, you have successfully installed the template!

## **Additional Installations**

Learn about the additional configuration for CRM.pad.

#### **CRM.pad Installation**

CRM.pad template configurations are only available for the ISI and LSI template, see **Supported Versions** on page 7 section to find the template version you need. All necessary configurations are imported, when you import the most recent template package. The following configurations are included:

- ISI template:
  - TE\_ISI\_TABLET
- LSI template
  - TE\_LSI\_TABLE
  - TE\_CG\_TABLET

Please make sure that a current update.tablet configuration is imported in your designer. The ISI template CRM.pad is available in these languages:

- English
- German
- Dutch
- French
- Polish
- Chinese

The LSI template CRM.pad is available in these languages:

- English
- German
- Dutch
- French
- Chinese
Please make sure that your desired languages are set to active in designer.

To complete the template installation of the CRM.pad please go to designer, select 'Client Data Model' and update the data model:

New Sub-Configuration 🗙 Delet	e Configuration 📳 View Hierarchy	ý.
Configuration TE_ISI	TABLET (1004)	~
CRM Username TE_ISI		~
Views	Navigation	Co
Info Areas	Menus & Actions	
Expands	Buttons	U
Search&Lists	Headers	_
Field Groups		Ot
Info Area Labels	Quick Search	R
Texts	Filter   Query   Analysis	
	Filters	Pa
lexts	Oueries	
Languages	Analyses	
Tablet		
	Timelines	
Client Data Model		
Client Data Model Offline Data Sets	Forms	
Client Data Model Offline Data Sets Startpage	Forms	
Client Data Model	Forms	
Client Data Model Offline Data Sets Startpage Client Data Model Update Data Model	Forms	
Client Data Model Offline Data Sets Startpage Client Data Model Update Data Model Info Area	Forms	
Client Data Model Offline Data Sets	Forms	
Client Data Model Offline Data Sets Startpage Client Data Model Update Data Model Info Area Rep (ID) Company (FI) Person (KP) Marketing Activity (AK)	Forms	
Client Data Model Offline Data Sets Client Data Model Update Data Model Info Area Rep (ID) Company (FI) Person (KP) Marketing Activity (AK) Note (NO) Item master (AR)	Forms	

Please also have a look at the offline datasets to make sure that everything that you need is correctly synchronized! If you follow the installation guide for a Template Upgrade on page 39, the template CRM.pad configuration is also updated.

#### Installation and Upgrade information for LSI CRM.pad version 5 (BS)

Please change the tenant for 2 LSI-Template Configuration records. The records with Config. Category: "XML-Report (BASE)" and Config. Option: "Customer Report (BASE)" and Text 1: SHOW\_SIGNATURE have to be set to tenant 9000 manually.

Those configuration records with the correct tenant are needed for the feature "Signature Box in CRM.pad reports". Otherwise you cannot see this feature.

Before:

Į	👩 LSI-Ter	mplate Configu	uration	000001	) 🛛 🎝 🗏 👁	🖩 🏓 🛃 🗃		<b>6</b>		
	U012-TenNo	Country	Config. category	Config. option	Active	Description	Logi	Text 1	V	Identifier
۲	9050	Germany (BASE)	XML-Report (BASE)	Customer Report (BASE)	v			SHOW_SIGNATURE		ORDERPREVIEW
	9050	Germany (BASE)	XML-Report (BASE)	Customer Report (BASE)	v			SHOW_SIGNATURE		SAMPLEPREVIEW

After:

Z	了 LSI-Ten	nplate Configui	ration		à 🖪 😣	e 🏓 🛃 B		0	
-	U012-TenNo	Country	Config. category	Config. option	Active	Description	Log	Text 1	∇ Identifier
	9000	Germany (BASE)	XML-Report (BASE)	Customer Report (BASE)	v			SHOW_SIGNATURE	ORDERPREVIEW
	9000	Sermany (BASE)	XML-Report (BASE)	Customer Report (BASE)	v			SHOW_SIGNATURE	SAMPLEPREVIEW

## Addon Products (connectLive, Exchange connector SE, interface) (OP)

All settings files for addon products are delivered with the template package. You can find settings and example files for those products in the te.addon folder of your template. If you followed this installation guide you can find this folder in your web installation folder: C:\update.CRM\update.CRM web BTB.

#### CRM.server (BS: rep and settings, OP: create service)

Create a rep for the update.CRM server or use the deliver rep 'u8server'. The rep must have login rights for "server":



The rep must have the correct role to be able to create eg. MA, AF. Now you need to enter your server user's credentials in the users.xml: ... \web\system\set-tings\users.xml.



Now register the service on the application server using the update. Server.exe in the ...  $\$ 

...\web\bin\ update.Server.exe --install --name "<SERVICENAME>



To remove a service enter the following command:

...\web\bin\update.Server.exe --uninstall --name "<SERVICENAME>

See the started service in the list.



For more information, see *Aurea CRM.core Administrator Guide*. **Template User Guide (BS)** 



There is an additional template-specific user guide available.

Please visit https://support.aurea.com for an up-to-date package.

Download the 'Online Help' for your template and copy it into the folder ...\web\web\help and overwrite all files.

## **Template Upgrade**

Learn about the prerequisites for template upgrade and other upgrade information.

## **Prerequisites (OP)**

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

**Note:** Please make sure that you turned off all IIS application pools and services (CRM.server, Connector) associated with the application you want to upgrade.

#### Important: Upgrade with an Installed Hotfix (OP)

In case you have installed these hotfix versions:

- TE ISI Release 8.1.2.172 Hotfix
- TE LSI Release 8.1.2.209 Hotfix

You have to delete the following catalog maintenance record (KW) manually in your database.

- LSI: External Key (field.id 22) is: 42958262947270 AND Modification (field.id 3) == empty
- ISI: External Key (field.id 22) is: 42953967931787 AND Modification (field.id 3)
   == empty

**Note:** The hotfix version was imported by cockpit with importing the catalog maintenance records. This maintenance included a dummy record with the highest external key. This behavior is already fixed in newer cockpit versions. That's why it only occurred in the hotfix versions.

## Cockpit Import (OP)

Be sure to open the TE <vertical> Release package in cockpit.

0		
<u>F</u> ile	<u>V</u> iew E <u>d</u> it <u>H</u> elp	
	New	Alt+Shift+N va
	<u>O</u> pen	Alt+Shift+O
	Save Package	AIT+SUITE+S
-	Save Package <u>A</u> s	Alt+Shift+A 📔
	Revert to Last Saved Version	Alt+Shift+R
	Export Package as .zip File	Alt+Shift+E
	Import Package from .zip File	Alt+Shift+I
	Create Documentation	Alt+Shift+D
-	Print Screen	Alt+Shift+P
	Exit	Alt+Shift+X
51	Processes	

Open Package	-		×
(j) Please select a package			
Package name			
Delete OK		Cance	el i

Now select "Import Package from .zip File".

**Note:** The template package required for installation or upgrade is found inside the TE\_<VERTICAL>\_<Version>.zip. Ensure that you unzip the above zip file and select the TE\_<VERTICAL>\_package\_<Version>.zip package to import.

0			
File	View Edit Help		
	New	Alt+Shift+N	wa
	Open	Alt+Shift+O	-11
	Save Package	Alt+Shift+S	
	Save Package As	Alt+Shift+A	e
	Revert to Last Saved Version	Alt+Shift+R	
	Export Package as .zip File	Alt+Shift+E	
	Import Package from .zip File	Alt+Shift+I	
	Create Documentation	Alt+Shift+D	Т
	Print Screen	Alt+Shift+P	
	Exit	Alt+Shift+X	
5	Processes		

Now select the template package and click **OK** in the following prompt.



Be sure to check all items in the following screen, and be sure to check '**Import** catalog maintenance items'.

_	Select Items to Import – 🗖 🗙
> Select Items Define Parameters First Phase Matchup Import Summary Import Second Phase Matchup Import Summary Import Third Phase Matchup Import Summary Import Fourth Phase Matchup Import Summary Import Juport Summary Import Juport Summary Import Jupot Summary Jupot S	<ul> <li>Please select the items of the package you want to import into your update.CRM database.</li> <li>Deploy web offline files</li> <li>Core tems (Catalogs, Formats, Info Areas, Records, Files from database)</li> <li>Import field help items</li> <li>designer Units</li> <li>Files (from file system)</li> <li>Update CRM.designer</li> <li>Synchronize changed or new catalogs</li> <li>Synchronize catalogs by default text and tenant no</li> <li>Synchronize catalogs using the external key</li> <li>Do not synchronize catalogs</li> </ul>
Select All Deselect All	Next Cancel

The '**Update CRM.designer**' option uses the same functionality as the **bulkloader**. By enabling this option cockpit automatically updates the CRM.designer database with the current datamodel, catalogs, CRM processes (R4) and roles (R2). You can also choose which catalogs you want to synchronize (**new or changed catalogs**, **sync only catalogs** which are already in the designer or **sync no catalogs**). So you can choose if you want cockpit to do it, or manually do it later using CRM.bulkloader.

-	CRM.bulkloader
Data Mo Update des	odel, CRM Processes, Roles and Catalogs gner database with current data model, CRM processes, roles and catalogs.
Data Model	CRM Processes and Roles Catalogs

Now you need to select the appropriate destinations for the following parameter paths, these parameters contain files which are required by the template. The \$WEB parameter is mandatory, however you can omit the \$TABLET and \$ADDON parameters, if you do not want to use these products. You can later import the cockpit package again and only import the missing parameters if you need these files (make sure to only check the box 'Files (from file system)' in the previous step):

\$WEB: This parameter contains all template files which are needed for Aurea CRM, use the web folder, inside your installation directory, e.g. C:\update.CRM\update.CRM web BTB\web.

**\$TABLET:** This parameter contains the tablet resources (images) which are required for CRM.pad. The files is extracted to the standard tabletResources folder. Select therefore the same folder that is used for the **\$WEB** parameter.

\$ADDON: This parameter contains all settings files which are needed for several addon products, such as interface or connector. You can place these wherever you want, you need to copy and edit these files before you use them with the product. E.g. select your installation directory, C:\update.CRM\update.CRM web BTB.



If the button with the three dots is not visible, use the scrollbar at the bottom of the window to scroll to the right or make the window bigger in the bottom right corner. You can also paste your destination path into the second column.

		Define Par	ameter Path for Location of Files	>
Select Items > Define Parameters First Phase	(i) st	pecify the path(s) to be u	sed by placeholders in file names to determine where	the files are stored.
Matchup		Parameter name:	Path in destination file system:	Select Destination Folder
Import Summary		\$WEB	C:\update.CRM\update.CRM web BTB\web	
Import Second Phase		\$TABLET	C:\update.CRM\update.CRM web BTB\web	
Matchup		\$ADDON	C:\update.CRM\update.CRM web BTB	
Import Third Phase Matchup Import Summary Import Fourth Phase Matchup Import Summary Import Update CRM.designer Finished				
< <u>B</u> ack				Next Cancel

Now the matchup process starts. You should always click on "**All from Package**" if you are importing a template. Then, click on "**Next**". This matchup process could start two more times depending on what you configured previously. Be sure to select "**All from Package**" every time the matchup is started.

	[	Define Overwriting Items			- 🗆 ×
Select Items Define Parameters	<ul> <li>As both (import items and database</li> </ul>	a items) has been changed, please specify	which of the items shall overwri	te the others.	
Matchup     Import Summary     Import     Second Phase     Matchup     Import Summary     Import     Third Phase     Matchup     Import Summary     Import     Fourth Phase     Matchup     Import     Fourth Phase     Matchup     Import     Import	In Import Item Record Customer Productive (AS-1	Matchup Package overwrites Database > V	n Database Item ecord CU Customer (AS-1)	By Matchup	Xml Difference
< Back		Next	All from Package All fr	om Database	Cancel

You can now see an import summary. The template is imported after you clicked on "Start writing to Database".

	Import Summary	- 🗆 ×
Select Items Define Parameters	Please check the following setting(s) and start the import by clicking the "Start Import" button.	
First Phase Matchup	Impation	
> Import Summary	- Core teme	-
Import	- Colo Itolia	
Second Phase	- Field bein items	
Matchup	- designer Units	
Import Summary	- Files	
Import		
Third Phase	Parameter path(s)	
Matchup	- \$WEB: \\Uprvtempapp03\UNITTEST\isi\web\web	
Import Summary	- \$TABLET: \\Uprvtempapp03\UNITTEST\isi\web\web	
Import	- \$ADDON: \\Uprvtempapp03\UNITTEST\isi\web	
Fourth Phase		
Matchup	Ignored items	
Import Summary		
Import	Import items	
Update CRM.designer	- Record TE_German (00-100)	
Finished	- Record TE_English (00-101)	~
( Deals	Clast unities to Detaile	Canad
< DBCK	Start Writing to Database	Cancel
1		.1

The matchup process then restarts. Be sure to check "All from Package"! It is also possible that an empty Matchup window is opened and closed after a few seconds without user interaction. This is intentional as the matchup process did not find any items which were altered in this phase.

A message should be displayed when the import has finished successfully.

Colore Hones	(i) Please click 'Close' to finish the i	import.	
	~		
	Monort result:	Success	
	anportroude.	000000	
	Imported items (by type):		
	Record	852	
	Catalog	428	
	Format	489	
	Configurations	5	
	File	3	
	Directory	9	
	Field Help Records	11769	
	Field Help Dependent Records	26287	
	The second se		
	Imported items (by status):		
	Success	39481	
	None	361	
> Finished	Please click 'Close' to finish the impor	rt.	

Also, remember to change the web.config and settings.xml.

**Important:** The logins and passwords remain the same after the upgrade.

To synchronize the designer and windows database please start the Aurea CRM **bulkloader** located in ...\update crm web\designer\database.

💿 update CRMbulkloader			_ 🗆 🗵
Upload, Download or Maintenance? Select the desired operation.		(	Dpdate
<ul> <li>Upload data into the designer database         The data contained in XML files will be uploaded into the designer         Download data from the designer database         The data contained in the tables of the designer database will be         Maintenance         Create or upgrade the designer database.         Data Model, CRM Processes, Roles and Catalogs         Update designer database with current data model, CRM process     </li> </ul>	database. downloaded and store es, roles and catalogs.	d in XML files.	
✓ Save program settings			
V8.0.2514.55425	< Back	Next >	Exit

Provide your SU credentials and the address of your web service. In case you are using RAS, provide your RAS login credentials. The language you select here is the language that the fields are displayed in the designer, e.g. if you select "**eng**" then the fields in designer is displayed in English:

Login to update	RM Login		(Opdate					
Login								
User name:	su		🔲 Single Sign-In					
Password:								
Language:	eng	•	[					
update CRM	designer Web Servic	e URL:						
http://localh	ost/ <web>/crm.servi</web>	ices/						
					Test			
					1 Gat			

On the first tab, please click on Update Data Model:

💿 update CRMbulkloader		
Data Model, CRM Processes, Roles and Catal Update designer database with current data model, CRM processes, r	l <b>ogs</b> oles and catalogs.	<b>O</b> pdate
Data Model Processes and Roles Catalogs		1
Eill temporary tables only (does not update the designer database)		Update Data Model
V8.0.2514.55425	< <u>B</u> ack	<u> </u>

On the second tab, please check **all** and then click **Update**:

🥶 update CRMbulkloader		
Data Model, CRM Processes, Roles and Catalo Update designer database with current data model, CRM processes, ro	<b>ogs</b> les and catalogs.	<b>O</b> pdate
Data Model Processes and Roles Catalogs		
V8.0.2514.55425	< Back	<u>U</u> pdate <u>Finish</u>

#### Upgrade information for ISI Version 2 (BS)

- ABC Field FI/OJ/Y1:
  - FI:

We are now using the ABC FI/35 field instead of ABC FI/5002, as this is the standard product field. This field is automatically filled by the portfolio. The field is read-only and can only be filled via the portfolio.

**Note:** The old field is renamed to "-x-". Please remove the old field from the masks if you copied the template masks to your configuration.

• OJ:

We are now using the ABC OJ/21 field instead of ABC OJ/5022, as this is the standard product field. This field is automatically filled by the portfolio. The field is read-only and can only be filled via the portfolio.

**Note:** The old field is renamed to "-x-". Please remove the old field from the masks if you copied the template masks to your configuration.

• Y1:

We are now using the ABC Y1/17 field instead of ABC Y1/5004 as this is the standard product field. This field is automatically filled by the portfolio. The field is read-only and can only be filled via the portfolio.

**Note:** The old field is renamed to "-x-". Please remove the old field from the masks if you copied the template masks to your configuration.

#### • PR Status Field:

There is a new Status PR/5045 field which is used in the service reports area. This field is read-only and can only be changed using the buttons in the mask. The Status PR/8 and Stage PR/9 fields have been removed and are not relevant for service reports anymore.

**Attention:** Please remove the old field from the masks if you copied the template masks to your configuration.

#### Upgrade Information for ISI Version 3 (BS)

#### • Company Type Field – Virtual Info Area (TFI1)

In version 1 and version 2 we used field 167 as company type field. In version 3 we are using field 28 (array field).

Due to the fact that we are using the array functionality now, we created a new field (FI, 5031) which is now used as a separation of the virtual info area (TFI1).

• Global Extension of the Station Right

We've changed the name of the global extension of the station right from "CU\_SR\_Global\_Extension" to "CU\_SR\_Central\_Global\_Extension" to fit the name of the global extension of update.seven.

• Station right v2:

Rights: TE_SR	Centra	al		6	2 🖬 4	r ,e i	<b>3</b> 8										
Access Rights	TE_SR Cen	ntral									Overrid	e station	n rights				
Extends											Overrid	le group	rights				
Global Extension	CU_SR_Glo	obal_Ext	tension								Overrid	le rep rig	phts				
Local Extension											Further	Setting	s				
Inheritance	r									V	Further	Setting	s inherita	nce			
Info Area	DA	eny Iccess	Deny New	Deny Update	Deny Deletion	Condit. Access	Condit. New	Condit. Update	Condit. Delete	Implicit Hierarch	Create Default	Fields	Cond. Fields	Triggers	Workflow	Log - Read	Li Vi
= Rep			r		v			v				v		v			

• Station right v3:

🚯 Rights					ê 🖬 4	1 P 1	8 8										
A	ccess Rights TE_SR (	Central									Overrie	de statio	n rights				
	Extends	Override group rights															
Glob	al Extension CU_SR_	Central_(	Global_E	tension							Overrie	de rep ri	ghts				
Loc	al Extension										Furthe	r Setting	js				
	Inheritance 🖌									r	Furthe	r Setting	as inherita	ance			
Info	Area	Deny Access	Deny New	Deny Update	Deny Deletion	Condit. Access	Condit. New	Condit. Update	Condit. Delete	Implicit Hierarch	Create Default	Fields	Cond. Fields	Triggers	Workflo	Log - Read	
🗏 Rep			v		v			v				v		v			

To merge the old (v2) global extension with the new global extension do the following:





		Load				
Rights						
Name						
					Tatal	0.1
CU_SR_Global_Extension					I otal : 2	21
	2. Colored the					
Name Z	3. Select the	Updated on	User	Lock	Private	
BACKUP_TE_SR Central	extension	26.09.2013	PHILIPPI			
CORE_SR_Central	extension.	02.08.2013	SU			
CU_SR_Central_Global_Extension	10.02.2014	09.04.2014	SU			
CU_SR_Global_Extension	09.04.2014		SU			
ProcessDeveloper (internal)	31.10.2012	31.10.2012	GUENTERS			
TE_OppBasic	10.03.2014	10.03.2014	SU			
TE_RepRight Import	23.03.2010	09.04.2014	SU			
TE_RR Admin	24.08.2011	09.04.2014	SU			
R Demorole	23.02.2012	27.05.2013	SU			
E RR Discovery	26.07.2013	09.04.2014	PHILIPPI			

🚯 Rights	i 🗄 🖉 🔎
Access Rights CU_SR_C Extends TE_SR C Global Extension Local Extension Inheritance	entral_Global_Extension entral 4. Save the format.
Reminder	Access New Undate Deletion Access
-x-Reporting	NOW the
Favorites	settings
Skill	are
Em Rep role	transfered.
E Station	
Communication	
Communication Log	
Station Language	
Distribution Logic	
E Company	V
····· Contact Person	
Person	V
Activity	
Repetition	
Note	
Mailing	

## Upgrade Information for ISI Version 4 (BS)

For a list of changed designer units, see the Appendix chapter Changed Designer Units for ISI Version 4 on page 95.

#### • New Relationship Charts

From version 1 - version 3 we used fusion charts to display the relationship charts of companies and persons. In version 4 we are using a feature which comes with the standard product. Therefore, we replaced the old buttons and the old menu action with new ones.

Old item	New item
TE_FI_RelationshipDiagram (button)	TE_FI_RelationshipDiagram_v2 (button)
TE_KP_RelationshipDiagram (button)	TE_KP_RelationshipDiagram_v2(button)
TE_A_FI_RelationshipDiagram(context menu action)	TE_A_FI_RelationshipDiagram_v2 (con- text menu action)

The old items still exist, and can be reactivated.

#### New Variable Definition

With version 4 we are delivering variable values (which are used for some processes) without a station number (see chapter Aurea CRM win – Variables (Z5/Z6) (BS)).

**Note:** The Template variables is only updated to not include the station number if you did not change the variable as the upgrade should never change customized settings.

#### • Deactivated Template Processes

We are delivering a lot of CRM processes with the template.

The following processes are deactivated by default in version 4 and higher:

Process Name	Process ID (Tree)
QlikView	1.4.7.400
Scura CLM	1.400.2
GIS (Bing Maps)	1.5.2.5.2
Expenses	1.4.10   1.4.10.400
Property Matchup	1.2.401
Lead Management	1.3.6
Social Inbox	1.4.6.3.1
Social Ticket Management	1.1.1.1.19   1.1.1.1.20
Social Product (eg. Idea Management)	1.6
Yammer	1.400.3

#### • New Corporate Currency Fields

With version 4 we are using special currency fields for reports and analyses.

Every report/analysis using the following info areas has been changed: Y1, Y5, PR, AP, AU, UP, OJ, and PO. The following fields have been replaced:

Infoarea	Standard Field	New Corporate Currency Field
Y1	145	5046
Y1	147	5047
Y5	6	5000
Y5	7	5001

Infoarea	Standard Field	New Corporate Currency Field
PR	13	5046
PR	167	5047
AP	19	5026
AP	112	5027
AU	11	5006
AU	140	5007
UP	17	5001
UP	87	5002
OJ	26	5038
РО	5	5001
РО	2	5003
PO	3	5005
PO	4	5007

## Upgrade Information for ISI Version 6 (BS)

An new virtual infoarea has been added to the settings.xml (TPE1 - Private Customer). Please check out the "settings\_Example.xml"

## Upgrade Information for LSI Version 3 (BS)

• Changes to Catalog 132 "Order status"

We changed **TENANT** and **EXTERNAL KEY** for this catalog.

These changes is applied by catalog maintenance while upgrading to version 3 to formats but not to designer-catalogs and add-on programming.

Please check your designer catalogs and add-on programming.

Value in BASE Language	Version 2		Ver- sion3	
	Tenant	External Key	Tenant	External Key
Blocked (BASE)	9050	132-9001-00009	9000	10002_132_9
Cancelled (BASE)	9050	132-9001-00011	9000	10002_132_11
Closed (BASE)	9000	132-9000-00010	9000	10002_132_10
Delivered (BASE)	9050	132-9001-00008	9000	10002_132_8
On Hold (BASE)	9050	132-9001-00003	9000	10002_132_3
Open (BASE)	9000	132-9000-00001	9000	10002_132_1
Partially delivered (BASE)	9050	132-9001-00007	9000	10002_132_7
Pending (BASE)	9050	132-9001-00004	9000	10002_132_4
Pending ext. (BASE)	9050	132-9001-00006	9000	10002_132_6
Review (BASE)	9050	132-9001-00002	9000	10002_132_2
Transferred (BASE)	9050	132-9001-00005	9000	10002_132_5

Version 2 compared to version 3:

E C	atalog	S S 1 N X ≤ S		<u>C</u> ountry		Catalog	• •	🛍 🖄 🏖 🖻
Order sta	atus (Order) [132]	<b>v</b>		<u>C</u> atalog	Order st	atus (Order) [132]	*	
Tenant	External Key	Description	Lo	Data Model	Tenant	External Key	Loc	0001 TE_CATALOG_BASE_LANG
9050	132-9001-00009	LSI&CG: test value		<u>T</u> ext	9000	10002_132_9		Blocked (BASE)
9050	132-9001-00011	LSI&CG: test value		Eield Help	9000	10002_132_11		Cancelled (BASE)
9000	132-9000-00010	TE: used in conditions in stationright		Delete	9000	10002_132_10		Closed (BASE)
9050	132-9001-00008	LSI&CG: test value		Delete	9000	10002_132_8		Delivered (BASE)
9050	132-9001-00003	- coloco, test value		Undate	9000	10002_132_3		On hold (BASE)
9000	132-9000-00001	TE: used in conditions in stationright			9000	10002_132_1		Open (BASE)
9050	132-9001-00007	LSI&CG: test value			9000	10002_132_7		Partially delivered (BASE)
9050	132-9001-00004	LSI&CG: test value			9000	10002_132_4		Pending (BASE)
9050	132-9001-00006	LSI&CG: test value			9000	10002_132_6		Pending ext. (BASE)
9050	132-9001-00002	LSI&CG: test value			9000	10002_132_2		Review (BASE)
9050	132-9001-00005	LSI&CG: test value			9000	10002_132_5		Transferred (BASE)
<					<			

• Variable (Z5) "TE\_Calls.ConditionCallTypeCreatePOSMonitoringHeader"

Please delete all existing Z6 records for the "TE\_Calls.ConditionCallTypeCreatePOSMonitoringHeader" variable.

We have changed the Type of this variable and therefore deleted all related Z6 records. However, deletions are not transported by a template upgrade package so you have to do it manually.

#### **Upgrade Information for LSI Version 4 (BS)**

#### • Relationship Hierarchy - Update Relationship Level (B5)

Since version 4 we are using the new SP2 feature called "Relationship Hierarchy" in the sales rep right "TE\_RR Sales – CG". Therefore, you have to generate relationship records for your existing data. New relationships already creates a so called hierarchy record.

Go to the **WIN module** >> **Relationship Level**, and select the "**is a department of (BASE)**" relationship and right-click "**Generate Relationship Hierarchy**". If you want to use a different relationship type in rights you must also generate these types.

#### • Trigger 'TE\_PS\_NEW\_Create POS Monitoring Header'

We have removed the 'TE\_PS\_NEW\_Create POS Monitoring Header' trigger from the MA info area in the station right.

Now it is possible to create more than one visit per day per rep for an account. From now on the PS record is created in WEB within the call documentation process in the POS monitoring phase. The CRM.pad also takes care of creating the PS record on the client-side.

#### New Variable Definition

With version 4 we are delivering variable values (which are used for some processes) without a station number (see chapter Aurea CRM win – Variables (Z5/Z6) (BS)).

**Note:** The Template variables is updated to not include the station number if you did not change the variable as the upgrade should never change customized settings.

#### Upgrade Information for LSI Version 5 (BS)

#### **Conditional Access for FI via Rep Reference**

With this version we are using a new core product feature "Using Rep References for Rights Definitions (#84936)". This makes the former template logic for splitting of SB-records redundant.

**Attention:** It is still possible to use the former splitting logic and field "functional role"! All necessary formats are still available in the template. Please customize manually in your customer's project if you still want to use it in that way.

The index for info area SB has been modified with version 5. The field "Functional Role" (SB.5008) was removed from the index. This field was used for all split SB-records.

[ID]	Account	Manager	V 🛃 B	
No	ID	Properties	Fields	Additional index fields
1	1		FI_StaNo,FI_SerNo,PE_StaNo,PE_SerNo,Business area,-x- Item type,-x- Indication group,-x- Route User,RO_StaNo (index)	-xFunctional-Role
2	2	[ID]	SB-StaNo,SB-SerNo	
3	3	[DUPLICATE,NOT NULL]	-x-,-x-[UPPER,NOT NULL,BINARY SORT]	-
4	4	[DUPLICATE,NOT NULL]	PE_StaNo,PE_SerNo[NOT NULL],FI_StaNo,FI_SerNo	
5	200	[DUPLICATE]	RO_1_StaNo,RO_1_SerNo	
6	201	[DUPLICATE]	Business area,FI_StaNo,FI_SerNo,PE_StaNo,PE_SerNo	
7	202	[DUPLICATE]	FI_StaNo,FI_SerNo,PE_StaNo,PE_SerNo,Business area,-x- Functional Role	

To activate this new feature you have to do the following steps:

- Go to Maintenance >> Data Model >> Account Manager (SB) >> Index and click "Apply Info Area" to apply the changes marked in red. (Cockpit does not apply these changes automatically!)
- Delete the existing split SB-records from your database. This is done by means of a maintenance/deletion run: Delete all SB-records with field "TE: Split SB-record?" (SB.5009) == "Yes".

This deletes all records created by the template workflows. The data contained in these records is a duplicate of the SB records created manually or by the standard product logic.

<b>O</b> pdate	00000000000	
Country	📑 Delete	🗧 🕘 🕰 🖻
<u>C</u> ity <u>C</u> atalog	Account Manager	Condition
<u>D</u> ata Model Text	Condit. Active	
Eield Help	Selection	Sel. Name
Delete Update	User Confirmation	Records Deleted
		Search Conditions - Account Manager Search Condition  Defined Conditions

 Activate the "Calculate rep reference" for your customer's station in the rights module >> station configuration. Field "Calculate rep reference" must be set to true. Due to performance it is not recommended to activate this feature on offline stations.



4. Check the data model and check column "Depict rep reference" for the uid fields you want to use as a rep reference. This has been already done for all fields part of the standard product or template. For fields added in the project you need to do this.

😑 Ac	🖹 Account Manager 🧉 🖉 🗟										
	ID	Name	Туре	Reference	Catalog	DB Column	Time star	Length	Properties	Format	Depict rep reference
0	0	-x- Item type	var catalog		(80) Item type	Segment		80	in()		
1	1	-x- Indication gro	var catalog		(69) Indication group	WarenGr		80	in()		
2	2	-x-Route User	uid	-x-Route User Group		BetreuerId		10	no sum , rep	leading zero ,	
3	3	SB-StaNo	sno(2Byte)			ID		5	no sum		
4	4	SB-SerNo	Ino(4Byte)			ID		9	no sum		
5	5	Account Manager	uid	Account Manager Gro		BezirksleiterId	v	10	no sum , rep	leading zero ,	(V)
6	6	Account Manager	uid	Account Manager 2 0		Verkaufsdirekto	v	10	no sum , rep	leading zero ,	v
7	7	Account Manager	uid	Account Manager 3 G		VerkaufsleiterId	v	10	no sum , rep	leading zero ,	v
8	8	Account Manager	uid	Account Manager 40		KeyAccountintI	v	10	no sum , rep	leading zero ,	v
9	9	Account Manager	uid	Account Manager 5 0		KeyAccountnat	v	10	no sum , rep	leading zero ,	v
10	10	Account Manager	uid	Account Manager 6 0		KeyAccountreg	r	10	no sum , rep	leading zero ,	v
11	11	Account Manager	uid	Account Manager 70		KeyAccountSch	v	10	no sum , rep	leading zero ,	v
12	12	Account Manager	uid	Account Manager 8 0		InDId	v	10	no sum , rep	leading zero ,	v
13	13	Region Manager	uid	Region Manager Grou		Verkaufsfoerde	v	10	no sum , rep	leading zero ,	v
14	14	Sales Manager	uid	Sales Manager Group		VertreterId	v	10	no sum , rep	leading zero ,	L V

5. Check conditional access conditions for your customer rights and change the conditions to the rep reference info area if necessary. This has been already done for all rights part of template. For rights added or modified in the project you need to do this.

🔝 Rights	ai III 🖋 👂 🛃 12					
Access Rights TE_RR Sales - C Extends Global Extension Local Extension Inheritance	26		Override station rights Override group rights Override rep rights Further Settings Further Settings inherit	tance		
Info Area Deny (ft) Account (CP) Role (RP) Contact Person (RP) Condit, Access: Account	Deny Deny Deny Deny Condi. Condi. Condi. New Update Deleton Access New Update	Condit. Implicit Delete Hierarch	Create Default Fields Cond. Fields	Triggers Workflow	Log - Log - Read Write Histo	ry Markas Additon Additon
Info Area	Index Relationship	With Conditions	s Indirect	Not Included	Person Both	Description
OR     (F1) Account (1-1)     (F1) Account (1-1)     (F1) Account (1-1)		v				System Company Flag = TRUE Account status (TE) <> inactive
	960. FI-StaNo,FI-SerNo -> (TREE-Parents)->F	V				(created by me) AND (created on current week) Relationship Target-FIs via "Relationship hierarchy"-feature
(10) Rep reference (1-N)	0. FI-StaNo, FI-SerNo -> FI_StaNo, FI_SerNo	Define Scarch Con Search Con Defined Cor	h Conditions - Rep refe dition ditions rep reference $\exists$ Rep ID $\forall$ = Current User ( $F$ ) $\exists$ AND Link to Info Area $= \forall T = 58$	erence		Account Manager is me

- 6. Designer: Check your SB masks and lists in your own designer configurations if you have copied them to your configurations or to any user configurations.
- 7. SQL Tool >> Calculate Rep Reference

This setting enables the table "Rep reference" (10). As this table has to be filled you need to carry out the creation of records by starting the SQL tool (mmba.exe -q):

- a. Select an info area for which rep references are configured.
- b. Click on Calculate rep reference.

Use the ReCreate Procedure and ReCreate All Procedures buttons to re-create the database triggers.

## Troubleshooting

Learn to troubleshoot certain known issues.

#### Strange Images (BS)

If you are seeing something like this:

	Backoffice-Dashboard			
<u>.</u>	🐻 😡 🕻 Willkommen bei update.CRM, SU			
	To Do			
I.				
Шş	Nächste Aktivitäten			
	Ergebnis (0 Datensätze)			
<b>1</b> 0	Die Abfr	age lieferte kein Ergeb	nis.	
\$ <sub>m</sub>	RfC zu genehmigen			
	Suchergebnis	Genehmigen	Ablehnen	Listenfelder anpassen
Ä	Die Abfr	age lieferte kein Ergeb	nis.	
	Bestandsinventarisierung			
			Abschließen	Listenfelder anpassen
	Die Abfr	age lieferte kein Ergeb	nis.	

Please delete your browser cache!

#### "Bad Request" Instead of Start Page (OP)

If you are using the hotfix version (Aurea CRM web 8.0.2686, Aurea CRM win 8.0.742) you may encounter this bug.

#### Symptom

The template shows a "Bad request" message on the start page after patching CRM.web and upgrading the designer configurations.

#### Reason

The currently released version of the template uses the "framework/start.aspx" and "mm/start.aspx" sites that were deprecated in the meantime.

These sites are replaced in the current version of CRM.web.

#### Solution

The next hotfix of CRM.web (July) can handle such deprecated calls. The ISI template changes to a supported start page in an upcoming hotfix.

Until then, please start this script in your designer database (once only) to replace the legacy paths:

```
-- replace legacy paths into 'mm/...' and 'framework/...' with 'crm/...'
update portal_page set [call] = 'crm/' + substring([call], 4, len([call]))
where [call] like 'mm/%'
update portal_page set [call] = 'crm/' + substring([call], 11, len([call]))
```

where [call] like 'framework/%'

#### LSI Marketing User – Marketing Role – Designer Problem (BS)

#### **Problem Description**

A user logging in to Aurea CRM web as a marketing user, cannot modify his/her user configuration. For example, the current user cannot save changes in the user configuration.

#### Solution

A small adaption in update.CRM Designer is necessary to fix this problem.

- 1. Click on "Users" on the designer start page and then the "Configurations" radio button.
- 2. Modify the TE\_LSI\_Management group configuration.
- Delete the defined "Marketing (Marketing (BASE))" role in the TE\_LSI\_Management group.

Startpage	Users / Configurations		
Cor	nfiguration Id 1007 (Design this configuration)		
	Name TE_LSI_Management		
Parent	Configuration XX_LSI_Country_Customer	$\checkmark$	
	Template		
	Parent: <u>TE_LSI</u>		
	-> <u>TE_CORE</u>		
	-> UPDATE DEFAULT		
Offline C	onfiguration: no offine Config	~	
	Roles Marketing (Marketing (BASE))		۹ ×
	Description Template		
Sub C	onfigurations none.		

4. Reset the IIS (recommended).

3

# **Data Prerequisite**

Data Prerequisite for the additional installation to the common installation of web offline product.

Below are the Data Prerequisite for installation of web offline industry business solution products:

# ISI (BS)

Data Prerequisite for ISI (BS).

## Plan Visits on Map

To use the 'Plan Visits on Map' feature, your companies and persons need to be geo-coded.

## Service Management

Please make sure that you configured all variables correctly (see chapter Aurea CRM win – Variables (Z5/Z6) (BS)).

Variable: TE_TicketMgmt_	кме 🕲 🕲 😋 😒 🕲	1 1 1 1 2 2 2
Name	Infobereich	Feldname Sper
TE_MA_NewLeadAppointmentText	Aktivität	Text
TE_MA_NewLeadAppointmentSubject	Aktivität	Betreff
TE_OppMgmt_Y1Participants_Level2	Opportunity	CountY2
TE_OppMgmt_Y1Activities_Level2	Opportunity	CountMA
TE_OppMgmt_Y1Evaluation_Level3	Opportunity	CountY3
TE_OppMgmt_Y1Competitor_Level3	Opportunity	CountY3
TE_OppMgmt_Y1Activities_Level4	Opportunity	CountMA_StateCom
TE_OppMgmt_Y1Participants_Level4	Opportunity	CountY2
TE_OppMgmt_Y1Offer_Level5	Opportunity	CountPR_StateSent
TE_OppMgmt_Y5Product_Level3	Opportunity	CountY5
TE_OppMgmt_Y1Activities_Level5	Opportunity	CountMA_LinktoPR
TE_OppMgmt_Y1Participants_Decider_Level4	Opportunity	CountY2_Decider
TE_Reporttext_Factsheet.Overview		
TE_Reporttext_Factsheet.BusinessData		
TE_Reporttext_Factsheet.FIKP		
TE_Reporttext_Factsheet.FIY1		
TE_Reporttext_Factsheet.FIPR		
TE_Reporttext_Factsheet.FIAU		
TE_Reporttext_Factsheet.FIOB		
TE_Reporttext_Factsheet.FIMA1		
TE_Reporttext_Factsheet.FIMA		
TE_Reporttext_Factsheet.FIMA2		
TE_Reporttext.NoData		
TE_TicketMgmt_PhaseMapping	Ticket	
TE_Reporttext_RelationshipDiagram.NewRelation		
TE_TicketMgmt_KMEmails_Phase1	Ticket	Counter - Sent Email
TE_TicketMgmt_KMServiceOffers_Phase2	Ticket	Counter - Service Of
TE_TicketMgmt_KMServiceReports_Phase5	Ticket	Counter - Service Re
TE_TicketMgmt_KMEmails_Phase1_Active	Ticket	
TE_TicketMgmt_KMServiceOffers_Phase2_Active	Ticket	
TE_TicketMgmt_KMServiceReports_Phase5_Active	Ticket	

## **Opportunity Management**

Please make sure that you configured all variables correctly (see the chapter Aurea CRM win – Variables (Z5/Z6) (BS)).

# LSI (BS)

Data Prerequisite for LSI (BS).

Specific data/configuration is required for the following processes.

## Country records (LA)

Please create the country records (infoarea LA) for your customer. You need country records to be able to create child records like City (OR), Global KPI (U022), LSI-Template Configuration (U012). Otherwise it is not possible to create child records.

Info: The following records are already shipped:

- Austria
- Germany
- United States

## Call Planning

Create the "Use geo-coordinates" parameter in the LSI Configuration table (U012):

🔅 LSI 🤅	Configuration							
	Country	Rep (n	Config. category	Config. option	A		Iı	1
Ô	Germany		AddOn	Call Planning: Priority		/		
6	Germany		AddOn	Call Planning: Priority	6	/		
6	Germany		AddOn	Call Planning: Priority	8	/		
6	Germany		AddOn	Call Planning: Waiting time coefficient	5	/		
	Germany		AddOn	Call Plannii g: Use geo-coordinates	5	<	1	
0	Germany		AddOn	Call Planning: Avoid visit duplication period		/	7	

## Fill it with the QueriesInfo XML

LSI Configuration for Germany, AddOn	
<ul> <li>Overview</li> </ul>	
Country Germany	Config. category AddOn
Active 🗹	Config. option Call Pla ning: Use geo-coordinates
Parameters Integer 1 1 Custom parameter 1 Custom parameter 1 (Custom parameter 1 (Custom parameter 2 (CalendarQuery name="TE_CallPlanning_Calendar" active="true"> (CalendarQuery name="TE_CallPlanning_Calendar" active="true"> (Variables> (Variables> (Variables) (Varia	Logical 1 💌

Please review the technical documentation for more detailed information.

## Sample Management

The following conditions have to be fitted to add new sample items using the serial entry.

- Samples can only be added if the MA is linked to a Person (PE). If not, it should not be possible to add sample items via the serial entry.
- The activity has to be today.
- The person must be the "Doctor" person type.
- The "Block samples" flag (in PE) may not be true (this flag is set automatically if there are more than 2 samples issued in one year per AR record linked to the person).
- Item master products (AR), which is submitted as a sample, have to have a sample configuration (MK) for the same business area as the currently logged in user (u8 business logic).
- Sample configuration:

Price lists × Sample Configuration ×								
«< < 1 - 1 of 1 > >> 🛍 New   🌣 Modify List Fields								
💉 Business area	Allocated	Launch start	Launch end	Units during launch	Units after launch			
Rx	~	01.05.2013	26.05.2013	10	4			
					<< < 1 - 1 of 1 > >>			

The "Allocated" flag has to be set to true! And there must be a value in the "Units after launch" field. For example, there is a sample configuration with value 4 in the "Units after launch" field. On CRM.pad the user has the possibility to add values in the "Quantity issued" and "Order quantity" fields in the serial entry of samples. Because there are only 4 units which could be issued to a doctor the user gets an error if he enters a value of "3" in the "Quantity issued" field and "2" in the "Order quantity" field (error message: "Your entry could not be saved (partially)"). If the user enters a value of "2" in the "Quantity issued" field and "2" in the "Order quantity" field there is no error thrown.

- If values are entered in the "Units during launch", "Launch start" and "Launch end" fields then the value of "Units during launch" is used to check quotas (the start date from the root MA record must be within the date of the "Launch start" and "Launch end" fields, otherwise the "Units after launch" field is used).
- If there are no values entered in the "Units after launch" or "Units during launch" fields the actual limit of samples per person per period is 2 samples.
- The actual available items for a specific date is calculated based on the number of periods and the number of samples per period:
- If there is a MJ record with a value in the "End of Period" field and this date is after the current date, the remaining quantity is the quantity minus the value of "Issued" field (Items) (if there are multiple records, the record next in size is used for calculation).
- If there is no server connection, MJ records is created offline (automatically), but not sync.

## **Territory Management**

The territory management defines which rep is assigned to which company/person.

For person-related reps fill the following mandatory fields:

- TenNo
- Business area / Geschäftsbereich
- Institution type / Institutionstyp
- Subject / Hauptfach

You need to create records for every institution type for every subject.

l	🏹 Allocation Co 🕲 😂 😂 😂 😂 🛍 🖉 🏦 🔜 📾 🔎 🚝 🖺 🗐									
	GL_TenNo Business area	Account type <sup>A</sup> Specialty Allocation code								
	9101 Rx	Association of SHI Physicians								
	9101 OTC	Association of SHI Physicians								
	9101 Rx	Beverage markets (BASE)								
	9101 Rx	Home for the Elderly								
▶	9101 Rx	Hospital								
	9101 OTC	Hospital								
	9101 Rx	Hospital Department								

Fill the following mandatory fields for the FI-related rep:

- TenNo
- Business area / Geschäftsbereich
- Institution type / Institutionstyp

## KPI

Define global KPIs for every country.

KPI (Global) To-Do										
ណ៍ Search Global KPI 🔅 ♥ 🗸										
Search Desults										
	Year	Country	Period	Business area	KPI type	Account type	Specialty	Classification	Tar	
	2014	Austria	1st Quarter	Rx	Target visits - Account			С	5	
Ξ	2014	Austria	2nd Quarter	Rx	Target visits - Account	Pharmacy		С	5	

## Interests/Characteristics

Define different interests for every interest area.

Search Characteristic Group Definition											
Search Results « < 1 - 5 of 6 > >> + New 🖾 🗸 🛱 Modify List File										Modify List Fields	
	Group Name	Characteristic group	Dependency	Lock	Single Selec	ti Col	umns	Note	Percentage	Brand	U019-TenNo
	Account Size	Account size	Account								9500
	Group Name = H	Hobbies	Person		✓						9100
	Hobbies	Hobbies	Person					Hobbies der	Per		
@ = v	Location	Location	Account								9100
	Member	Membership	Person								9100
										<<	< 1 - 5 of 6 🖒 ≫
Related	Data										
E Char	acteristic Definitio	on			A X	Char	acteristic R	estriction			~ ×
					+ New						+ New
100 C	Characteris	Characteristic Interactive	Sort Order	Point	s	100	Account	type (TE)	Person type (TE)	Specialty	
	Location	Frequented Io					Hospital				
	Location	Center-Pharm									
	Location	Health centre									

## **Product Detailing**

Create product detailing definitions for every business area:

#### Mandatory fields:

- PB-Name
- Business area
- Start/End date

Search	Results < 🕻 1	- 5 of 10 > ≫				+ New 📓 🕻	🖌 🏟 Modify List Fields
	Name		Туре	Business area	Specialty	Starts on	Ends on
≡∎	<ul> <li>Spring 2014</li> </ul>		PD prio	OTC		01.03.2014	31.05.2014
0=	👽 Autumn 2014		PD standard	OTC	General Medicine	04.03.2013	30.11.2013
	OTC Prio		PD prio	OTC		01.01.2014	31.12.2020
	OTC Standard		PD standard	OTC		01.01.2014	31.12.2020
	Summer 2013		PD standard	OTC		04.02.2013	28.06.2013
							<< < 1 - 5 of 10 > >
Relate	d Data	ition Items ×					
							+ New $  \mapsto$ Browse
100	Line No.	Item No.	Item name		Indication group	Brand	
	1	00002	OrangeMED Capsules				
	2	00001	HeartHealth Capsules 10 m	ng		Original drug ·	- non-prescription

## Expenses

Please create the following **To-Do**, so that every month record is created.

📒 To-Do	0000	001	🖿 🛛 🕸 📑 😣 🗉	A 🖸 🖉 🖉 🗛
TD_SerNo	10002		Escalate	
*Rep (name)	crmServer (9101)	<u></u>	Starts on	
signed by (Name)	crmServer (9101)	<u></u>	Starts at	
by group (Name)			Ends on	
Type	Calculate	Ξ	Ends at	
Part. Type	! Required	Ξ	Due on	
articipation Status	Open	Ξ	Due at	
Status	🕂 Open	X	Duration	1
scalate to (Name) e to group (Name)		;	calate to superior	
Report Function			Calendar	
Priority			Archive	
Execution Type	Workflow	v	o-Do is completed	
Execution format	TE_Expenses - Creat	e Records_	<u>v</u> 3	z
Info Info	<u>T</u> ext			

## **Key Account Management**

Set up the CRM.server correctly to use the Campaign/Activity Management.

There are 2 similar prerequisites for Key Account Management (bulk listing and creation of jobcards). Here you can see the data structure on which KAM is based.



Query im Form results on right hand side with:

- CoD A (Channel of Distribution) virtual node
- CoD B (Channel of Distribution) virtual node

Creation Listings results in records (Listing and Listing Items) linked to:

- CoD A
- CoD B

Creation Jobcards results in records (AF) linked to:

- Supermarket B1 (child node of CoD B)
- Supermarket A (child node of CoD A)
- Supermarket B2 (child node of CoD B)

**Tip:** The company record should be flagged as "Key Account" to see all nodes (KAM node, account plans and detail plans) in the FI treeview.

## **Bulk Listing**

On starting the bulk listing you get a list and query result.

Bulk Listing									
b P	lan Products	<< < 1 10 of 10+	> >>	📔 Quick Add	Target Companies Sear	ch			
	Item No.	Iten name	Store posi	Facings	Company name	Company type			
	001	abc			Edeka E-Center	Channel of distribution			
	002	abc:							
	003								
	004 ListViev	w U500			QueryResultPresenter	for FI and standard FI Sea			
	005								
	006	abc5							
	007	abc6							

Prerequisites:

- 1. Starting from Detail Plan (Y1) you need to create at least one Plan Product (U500). These records are displayed on the left side.
- 2. The Detail Plan (Y1) is linked to a company (FI). This account needs relationship data sets (PB) to other companies with the "has channel of distribution" relationship type (German: "ist Vertriebslinie von"). The right hand side displays the result from the 'TE\_KAM\_ChannelOfDistribution' query. If no results are available you can search for any company.

Additional Info for Presenting this Feature:

- At least two detail plans are required as related data of the account plan (e.g. one for listing, one for promotion/special offer).
- Listings which are created by the "Bulk Listing" functionality can be easily looked up in the reference book -> root record and listing items.
- Listing items are inherited to the supermarkets ("inherits to" relationship type) and is displayed in POS Monitoring and Order when the "Listing" filter is used.

#### Jobcards

For the "Jobcards" functionality please make sure that the CRM.server is running. For your information: the jobcards (work orders AF) are added through the business logic of the campaign management. The CRM.server rep MUST have the correct role to be able to create eg. MA, AF,...

On starting the JobCards you get a list of U500 and a query result for companies.



## Prerequisites for Job cards:

- For the "Jobcards" functionality please make sure that the CRM.server is running. For your information: the jobcards (work orders) are added through the business logic of the campaign management.
- Starting from Detail Plan (Y1) you need to create at least one Plan Product (U500). These records are displayed on the left side.
- 3. The Detail Plan (Y1) is linked to a company (FI). This account needs relationship data sets (PB) to other companies with the "has channel of distribution" relationship type (German: "ist Vertriebslinie von"). The right hand side displays the result from query: 'TE\_KAM\_ChannelOfDistribution'. If no results are available you can search for any company.

## Additional Info for Presenting this Feature:

- The Jobcards were added to the supermarkets which are connected to the selected "channel of distribution" with a "is parent node of" relationship type. The target group for the Execution (AD) is defined in that way.
- In the KAM Calendar (opened via QuickLink on the Key Account Management start page or via the "Marketing" -> KAM Calendar application menu) all marketing activities are displayed in Calendar week view.
- Above the temporal bar it is displayed how many jobcards were already completed in comparison to the total number.

The progress is announced on the joist in color. A click on the joist opens the details view of the marketing activity in the new tab and also shows the related data (relevant jobcards).

#### Global KPI

- Data prerequisite: A Company (FI) or Role (CP) record with an associated Account Manager (SB) must be available.
- Create a Global KPI record
  - The Country must be the same as the company's country.
  - The Year and Period must be in the current date range.
  - The Business Area must be identical with the account manager's business area.
  - Target visits must be entered.
  - The Classification must be the same as the company's classification.
  - The KPI type must be either "Target visits Account" for FI-related KPIs or "Target visits Person" for CP- related KPIs.
  - Example for a global KPI-record:

#### íí KPI (Global) for 2013, 4th Quarter

= 💉 🗸 📀					
Country	Vatican City State	Year	2013	Business area	Rx
Period	4th Quarter	Starts on	01.10.2013	Ends on	31.12.2013
Classification Details	C	Target visits/	5		
KPI type	Target visits - Account	Account type		Specialty	

- · Workflow logic and conditions
  - Loop over all SB records (where business area <> empty)
    - · Get business area from current SB record
    - Look for a linked KPI record (U007) for the current FI/CP with the following condition:



- Create a new KPI if no KPI is found.
- Update the found record if a KPI is found. (KPI must have the same business as the SB that is to be updated).

#### **KPI** Report
- A calendar has to be defined within the ID record.
- Values for the occupation overview are used from the occupation management from B2 records. One day is split into 4 parts. It doesn't matter if the occupation approval status from B2 is approved or not. Each record is used for calculation.
- Only if an activity is completed (manually or via Call Documentation process) it is used for calculation.
- To get only the records for the appropriate language, the station right has to be changed for the CD info area. The condition that has to be set, links the Calendar Id to that of the user, so any other calendar entry cannot be selected. In the admin role, this condition is removed. This is done because there is no link between the involved infoarea.

### FSI (BS)

Data Prerequisite for FSI (BS).

#### Master Data Type

Company records need to have a master data type (fieldId 29). Basically, this field is mandatory and therefore should never be empty. Please take care that this field is filled otherwise no mask is displayed.

#### **Incident Management**

Due to the fact that incident management is using CRM.server for generating incidents (AF) you have to consider to register a CRM.server service for the specific tenant. For example:

``../system/exe/mmserver.exe
--install -n <Servicename> -u <User> -p <Password>

We deliver a variable with the name "TE\_TD\_Set\_U8\_ServerUser" and a variable value (Z6) for tenant 1. If you are using other tenants then please consider that you have to create a new variable value for your new tenant.

🜍 Variable 🛛 🚳	00001 E	1 🗿 🖪 😣 🖩 🛋 B	Sorted by: (1) StaNo Add new
Nan	ne TE_TD_Set_U8_ServerU	ser	
Descriptio	on Set the CRMserver depe	nding on values defined in variable values!	۶
Info Are	ea To-Do		I
Field Nan	ne Rep / Group		I
Ту	be in the second s	Ξ	Lock
🐑 Variable Value 🕲 (	3 <b>6 6 6 6</b> 11 E	a <b>3 8 8 8 2</b> 5	Sorted by: (2) Z6_StaNo,Z6_SerNo Edit
Z6_Ten/	No 1	Customer	I
Stat. N	o.		I
Rep Group	ID 🖾		da
Rep	ID 🔝		<b>(2)</b>
Language N	o.		x
Login ro	le		x
Count	ry		
indition for info are	ea 🗾		x
Defa	ult		
Var. Te	xt		T
Var. Number/Catal	g		
Var. Rep 1	ID 1000100501	u8server	<u>a</u>
Var. Da	te		
Var. Time (	s)		
Var. Decim	al		
Var. Logic	al		
Lir	ık		3

#### CRM.loop

A new Web config variable have been created. ("TE\_CRM\_loop\_User")

Please take care to enter the CRM.loop user id in the variable "TE\_CRM\_loop\_User".

Startpage > Web Config	juration
Parameters Layouts	Тур
TE_CRM Other (1 of 286)	۹ 🥕 😭
TE_CRM_loop_User	Configuration: TE_FSI

## 4

## Installation WEB – OFFLINE (BS)

Learn about the server and client configuration for Web- offline installation.

This offline installation is in addition to the common installation guide of the web offline product.

#### **Template ISI Web Offline Installation**

#### Server

On the server perform the following:

- 1. Create a new person for the system company (synonym = "system company")
- Create a new rep (assign pre-created person to rep and ensure that the e-mail field is filled)
- 3. Assign a login role for the rep (e.g. Sales or Service)
- 4. Check if the rep can log in and that the role is assigned
- 5. Assign the "offline" role to the rep
  - The station is created automatically (consecutively numbered beginning with station number 100)
  - Central login configuration for the actual and the offline station is created
  - · Communication for the right stations is created

• File Edit View Data Info Estras W ①pdate	indew Help	iness logic
The station	Station: ISI TEMPLATE	occoccit sizes etc.
		Stat. Name Stat. Name Stat. Name Stat.
Communication		Netroffice ALCatMentenance DONE
Communication Log	Communication: 10001 - 900	Selen Acids Uper Contrage Defail Texplore Mole Defail Texplore Mole Defa
		Dett. Stat. No. 1000 Dati. Name of Marcus, som Dett. Stat. No. 1000 Dati. Name of Marcus, Stat. Dati. Name of Marcus, Stat. Stat. Dati. Name of Marcus, Stat. Dati. Name of Marcus, Stat. Dati. Stat. Name of Marcus, Stat. Name of Marcus, Stat. Dati. Stat. Name of Marcus, Stat. Name of Marcus, Stat. Dati. Stat. Name of Marcus, Stat. Name of Marcus, Stat. Dati. Stat. Name of Marcus, Stat.

• Several entries to the rep are set (e.g. username, offline user, offline station initialize,...)

						iness lo
	© Offline Iser				Q+ Suche	by the busine
1					Do	ne by
	SofflineUser					
	= 💉 🗸 📀					
F	Typ Mitarb	aitar	E-Mail otto@offline.ter	*	Verrachanhar 🖌	
	Bearb/Gr. Offline	eUser	Person Herr Otto Offlin	16	Aktiv ab 01/20/2014	
1	Bezeichnung Offline	aUser	Firma OfflineCompan	1¥	Deaktiviert ab	
	Einstellungen	Rechte Kontaktdaten	Signatur Arbeit	tszeiten 🚺 🧿	ffline connector-Einstellu	ngen
ſ	Benutzername OTTO			<b>-</b>		
	Offline-Benutzer 🗹		Offline- 100 Stationsnr.			
	Offline- 🗹	Of	fline-Station OfflineUser			
l	Station initialis					
ſ	Abhängige Daten					
	Centrale Login-	Konfiguration × Login	× Bearbeiterrolle ×	BearbZu	satzmandant × Skills ×	Gru; 🖸 🖸
					Neu 🕁	Durchsuchen
	Stations	nr. Statio	nsbez. N	ame	Passwort	Darenseenen
	R. COURSE	Custo	ner Broductive	TTO		
	1	Custon	ner Froudcuve O	/110		

- 6. Exportfortheofflinestation(e.g. "C:\ProgramFiles\update.CRM\update.CRMwin BTB\system\exe\mmco.exe" -u "SU" -k "out,100,u")
- 7. A new "GlobalPatchDirectory" directory has to be created in \update.CRM\up
- 8. A new "web" directory has to be created in "..\update.CRM\update.CRM web BTB\web.data\ GlobalPatchDirectory\"
- 9. Start cockpit and click on "Import Package from .zip File" and select the ISI Template package.

File	View Edit	Help	
	New	Alt+Shift+N	
	Open		Alt+Shift+O
	Save Package	Alt+Shift+S	
	Save Package As	Alt+Shift+A	
	Revert to Last Sav	ed Version	Alt+Shift+R
	Export Package as	.zip File	Alt+Shift+E
	Import Package fr	rom .zip File	Alt+Shift+I
	Create Document	ation	Alt+Shift+D
	Print Screen		Alt+Shift+P
	Exit		Alt+Shift+X
5	Processes		
	Content		

10.Select the Deploy web offline files checkbox.

Define Parameters	
First Phase Matchup	
Import Summary	Deploy web offline files
Import	
Second Phase Matchup	Import catalog maintenance items (use this option for upgrade only)
Import Summary	I I I I I I I I I I I I I I I I I I I
Import	Files (from file system)
Third Phase Matchup	
Import Summary	
Import	
Fourth Phase	
Import Summary	
Import	E Hadas CDM daviews
Update CRM.designer	
Finished	Synchronize catalogs by derault text and tenant no
	Synchronize catalogs using the external key
	Synchronize catalogs using the external Key

11.Select the newly created web folder in the **GlobalPatchDirectory**.

Define Parameter Path for Loc	ation of Files	_ 🗆 🗙
Select Items  > Define Parameters  First Phase	Please enter the path to the Global Patch directory for web offline.	
Matchup Import Summary Import Second Phase	Parameter name:     Path in destination file system:     Select I       \$WEB     C:Wersioner/\SI\02_WEB\update.we       Browse For Folder	Jestination Folder
Matchup Import Summary Import Third Phase Matchup Import Summary Import Fourth Phase Matchup Import Summary Import Update CRM.designer Finished		
< Back	N	ext Cancel

12.Click on the Start Writing to Database button.



13.When this message pops up you have to click on the Create for All button.

Import Progress	
Select Items Define Parameters First Phase	Please click 'Cancel' if you want to stop the current running import process.
Matchup Import Summary > Import Second Phase Matchup Import Summary Import Third Phase Matchup Import Summary	Create directory question         Image: Create directory question         The specified directory         'C:\Versionen\VSI\02_\VEB\update.web_8.2.7.8125_release_x64_bb\web.data\         GlobalPatchDirectory\web\system\settings' is missing but required to import.         Do you want to create this directory ?
Import Fourth Phase Matchup Import Summary Import Update CRM.designer Finished	Do not show this question again and create directories always     Create for All     OK     Cancel
	Importing File '\$WEB\system\settings\settings_Example.xml'
	Cancel

14.Import has finished.

Select Items	🔲 🚯 Please click 'Close' to fini	sh the import.	
Define Parameters			
First Phase			
Matchup	Import result:	Success	
Import Summary			
Import	Web offline files were deple	oyed.	
Second Phase			
Matchup	Imported items (by type):		
Import Summary	File	3	
Import	Directory	7	
Third Phase			
Matchup	Imported items (by status):		
Import Summary	Success	10	
Import			
Fourth Phase			
Matchup			
Import Summary			
Import			
Update CRM.designer			
> Finished			
	Please click 'Close' to finish th	e import.	

15.Copy only the global relevant configurations into the "GlobalPatchDirectory" (Login as "SU", go to "Settings" on "System information", enter your Offline user in the "user" field and then select the configurations to download them, e.g. "UPDATE\_DEFAULT", "UPDATE\_DEFAULT\_OFFLINE", "TE\_CORE", "TE\_ISI",...).

<u>(#0)</u>
(

**16**Adapt the offline.xml on the server (Please note that all parameters are mentioned in the Product Installation Guide of Web Offline).

**Note:** The user must have full access to the DatabasePath (Path to the local database file). Aurea recommends specifying a dedicated target directory for InstallDir and DatabasePath (e.g. InstallDir=C:\update.CRM) and defining sufficient access rights for this directory: This ensures that users working with Aurea CRM web offline are able to create and modify files and folders (write/modify rights).

**Note:** Ensure that you configure these two web configuration parameters:

- Offline.RootConfigurationToSync
- Offline.IncludeRootConfigurationInSync

#### Client

- 1. Adapt SilentClient.ini, for example: COMUserName=<User> COMUserPassword=<Password> [STATIONCONFIGURATION] StationNumberClient=<100> StationNumberServer=<1> ServerURL=<http://mywebserver/updateCRM\_web> ClientURL=http://localhost:7575
- 2. Install web offline (execute setup.exe)
- 3. Patch web offline and launcher to the actual version (actual web offline and launcher packages are available on https://support.aurea.com)
- 4. Start the launcher and initialize
  - Afterwards the web offline starts with a error message.



- · Please change or adapt the following files
  - C:\Program Files\update.CRM\update.CRM web offline BTB\web \web Example.config
  - C:\Program Files\update.CRM\update.CRM web offline BTB\web\system\settings\ users offline Example.xml
  - C:\Program Files\update.CRM\update.CRM web offline BTB\web\styles\te.base\custom- color\_Example.css
  - C:\ProgramFiles\update.CRM\update.CRM web offline BTB\web\system\settings\settings\_Example.xml

```
<update.configuration>
<!--OleDbDsn>&designerDsn;</OleDbDsn-->
<ConfigurationFromDB>false</ConfigurationFromDB>
<XmlStoragePath>C:\Program Files\update.CRM\update.CRM web offline
BTB\web\data\offline\configuration</XmlStoragePath>
<Vertical>&VERTICAL;</Vertical>
</update.configuration>
```

- Start launcher.
- Start Offline Manager and synchronize.

Template LSI Web Offline Installation Server

- 1. Create a new person in the system company
- Create a new rep (assign pre created person to rep and ensure that the e-mail field is filled)
- 3. Assign a login role for the rep (e.g. Sales or Service)
- 4. Check if the rep can log in and that the role is assigned
- 5. Assign the "offline" role to the rep and set the "offline-user" flag
  - The station is created automatically (consecutively numbered beginning with station number 101)
  - Central login configuration for the actual and the offline station is created
  - Communication for the right stations is created (Server->Offline and Offline->Server)

① File Edit View Data Info Extras Wi	ndow Help		
Opdate	00003 ===		
Etation	E Station: ISI TEMPLATE	000001228884	8
💼 C.Format		Stat.No	o. 10001 Stat. Name ISI TEMPLATE
<b>Communication</b>		Main Offic Station Access Biobt	Aut.Cat.Maintenance V
Communication Log		Desktop Forma	at Admin Desktop
Etation Overview		Default Telephone Profile Telephone Profile	the busit
	A.		pone by th
	Communication: 10001 - 9000		DOM
			Dest. Stat. No. 9000 Stat. Name offline_user
			Execution Manual/Autom.
			Input 🖌 Reminder Cycle in Days
			Output V Days to reception 7
			E-mail
			Comm.Format TE_Server_Sales >Offline
			Created on 10.01.2014 Updated on
			E-mail Admin.
			E-mail (Error)
			E-mail (Ok)
			Communication Overview

• Several entries to the rep are set (e.g. username, offline-user, offline station initialize,...)

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🔋 🤶 Offlin	eUser			Q- Suche	the b
				Done Di	
Contraction of the second seco	User				
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	Typ Mitarbeiter	E-Mail otto@offline	.test	Verrechenbar 🗹	
Bearb	/Gr. <u>OfflineUser</u>	Person Herr Otto C	ffline	Aktiv ab 01/20/2014	
Bezeich	nung OfflineUser	Firma OfflineCom	pany	Deaktiviert ab	
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				Neu → Durchsuc	hen
1	Stationsnr.	Stationsbez.	Name	Passwort	
	1	Customer Productive	οττο		

- 6. Export for the offline station(for example, C:\ProgramFiles\update.CRM\update.CRMwin OTC\system\exe\mmco.exe" -u "SU" -k "out,100,u)
- 7. A new "GlobalPatchDirectory" directory has to be created in ... \update.CRM\updata\updata.
- 8. A new "web" directory has to be created in ... update.CRM update.CRM web OTC\web.data\ GlobalPatchDirectory\.
- Start cockpit and click on "Import Package from .zip File" and select the LSI Template package

File View Edit Help	
New	Alt+Shift+N
Open	Alt+Shift+O
Save Package	Alt+Shift+S
Save Package As	Alt+Shift+A
Revert to Last Saved Version	Alt+Shift+R
Export Package as .zip File	Alt+Shift+E
Import Package from .zip File	Alt+Shift+I
Create Documentation	Alt+Shift+D
Print Screen	Alt+Shift+P
Exit	Alt+Shift+X
Processes	
E Content	

10.Click on the "Deploy web offline files" checkbox



11.Select the newly created web folder in the GlobalPatchDirectory.



#### 12.Click on the "Start Writing to Database" button



13. When this message pops up you have to click on the "Create for All" button.

Import Progress	
Select Items Define Parameters First Phase	Please click 'Cancel' if you want to stop the current running import process.
Matchup Import Summary > Import Second Phase	Create directory question
Matchup Import Summary Import Third Phase	The specified directory 'C:\Versionen\VSI\02_WEB\update.web_8.2.7.8125_release_x64_bb\web.data\ GlobalPatchDirectory\web\system\settings' is missing but required to import. Do you want to create this directory ?
Matchup Import Summary Import	
Fourth Phase Matchup Import Summary Import	
Update CRM.designer Finished	Do not show this question again and create directories always Create for All OK Cancel
	Importing File '\$WEB\system\settings\settings_Example.xml'
	Cancel

#### 14.Import has finished

Select Items	🕕 🕕 Please click 'Close' to fini	sh the import.	
Define Parameters	1.		
First Phase			
Matchup	Import result:	Success	
Import Summary			
Import	Web offline files were depl	oyed.	
Second Phase			
Matchup	Imported items (by type):		
Import Summary	File	3	
Import	Directory	7	
Third Phase			
Matchup	Imported items (by status):		
Import Summary	Success	10	
Import			
Fourth Phase			
Matchup			
Import Summary			
Import			
Update CRM.designer			
> Finished			
	Please click 'Close' to finish th	e import.	

15.Copy only the global relevant configurations into the "GlobalPatchDirectory" (log in as "SU", go to "Settings" in "System information", in the "user" field enter your Offline user and then select the configurations to download them, e.g. "UP-DATE\_DEFAULT", "UPDATE\_DEFAULT\_OFFLINE", "TE\_CORE", "TE\_LSI",...)

	Systeminformation	Q- Suche
-	Systeminformation	
	Benutzer	OTTO Benutzerdaten anzeigen
	Bearbeiter	OfflineUser
	Benutzergruppe	0
	Mandant	(1)
	Stationsnummer	1
	Rechte	
	Rollen	Keine Rollen zugewiesen
	Konfiguration	User OTTO ChildOf CU Customer (#100000) / CU Customer (#1003) / TE ISI (#1002) / TE CORE (#1001) / UPDATE DEFAULT Offline (#6) / UPDATE DEFAULT (#0)
F -	Telefonprofil	Kein Telefonprofil ausgewählt
<b>.</b>	Sprache	
<b>~</b>	Browser User Agent	Mozilla/5.0 (Windows NT 6.1; WOW64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/32.0.1700.76 Safari/537.36
	Aktive Sessions	1
	Server-Pfad	http://windows-gosssb0:80
	URL-Pfad	http://windows-gosssb0:80/updateCRM_web/
	Applikationspfad	/updateCRM_web/
	Dokumentpfad	C:\Program Files\update.CRM\update.CRM web BTB\web\\web.data\upload
	Version	BTBi 8.1.7.1247 (MSSQL)

**16**Adapt the "offline.xml" on the server (please note that all parameters are mentioned in the Product Installation Guide of Web Offline).

**Note:** The user must have full access to the DatabasePath (path to the local database file). update recommends specifying a dedicated target directory for InstallDir and DatabasePath (e.g. InstallDir=C:\update.CRM) and defining sufficient access rights for this directory: This ensures that users working with Aurea CRM web offline are able to create and modify files and folders (write/modify rights).

**Note:** Please ensure that you configure these two web config parameters:

- Offline.RootConfigurationToSync
- Offline.IncludeRootConfigurationInSync

#### Client

- 1. Adapt SilentClient.ini. For example: COMUserName=<User> COMUserPassword=<Password> [STATIONCONFIGURATION] StationNumberClient=<100> StationNumberServer=<1> ServerURL=<http://mywebserver/updateCRM\_web> ClientURL=http://localhost:7575
- 2. Install web offline (execute setup.exe)
- 3. Patch web offline and launcher to the actual version (actual web offline and launcher package available on support.update.com)
- 4. Start the launcher and initialize
  - Afterwards web offline starts with an error message.



- 5. Please change or adapt the following files
  - C:\Program Files\update.CRM\update.CRM web offline OTC \web \web\_Example.config
  - C:\Program Files\update.CRM\update.CRM web offline OTC \web\system\settings\ users offline Example.xml
  - C:\Program Files\update.CRM\update.CRM web offline OTC\web\styles\te.base\custom- color Example.css
  - C:\ProgramFiles\update.CRM\update.CRM web offline OTC\web\system\settings\settings\_Example.xml

```
<update.configuration>
<!--OleDbDsn>&designerDsn;</OleDbDsn-->
<ConfigurationFromDB>false</ConfigurationFromDB>
<XmlStoragePath>C:\Program Files\update.CRM\update.CRM web offline
OTC\web\data\offline\configuration</XmlStoragePath>
<Vertical>&VERTICAL;</Vertical>
</update.configuration>
```

6. Start launcher.

7. Start Offline Manager and synchronize.

5

## Installation Checklist (BS, OP)

Check list for basic installation and upgrades.

#### **Initial Installation**

For an initial installation please follow these steps:

#	Product	Description	Comment	Done By
0	WIN	Installation of WIN	Prerequisite	OP
1	WEB	Installation of WEB	Prerequisite	OP
2	WIN	Current station is "Main Office" and "Aut.Cat.Maintenance"	Prerequisite	OP
3	Cockpit	Import template package		OP
4	WIN	Load the "TE_ProcessConfiguration_Glob- al" process configuration in the Rights module		BS
5	WIN	Create new variable values for your station		BS
6	WIN	Configure CU languages	Only LSI/CG	BS
7	WEB	Rename settings_Example.xml to set- tings.xml		OP
8	WEB	Rename web_Example.config to web.con- fig		OP
9	WEB	Rename custom-color_Example.css to custom-color.css		BS + OP
10	Bulkloader	Update data model, CRM processes, cata- logs and roles		OP

#	Product	Description	Comment	Done By
11	Designer	Insert CRM sub-languages		BS
12	Designer	Create Customer configs		BS

#### Upgrade Installation

For an upgrade installation please follow these steps:

#	Product	Description	Comment	Done By
1	WEB	Turn off IIS application pools and services	Prerequi- site	OP
2	WIN	Current station is "Main Office" and "Aut.Cat.Maintenance"	Prerequi- site	OP
3	Cockpit	Import template upgrade pPackage with catalog maintenance items		OP
4	WIN	Load "TE_ProcessConfiguration_Global" process configuration in the Rights module		BS
5	WIN	Create new variable values with your sta- tion		BS
7	WEB	Rename settings_Example.xml to set- tings.xml		OP
8	WEB	Rename web_Example.config to web.con- fig		OP
9	WEB	Rename custom-color_Example.css to custom-color.css		OP + BS
10	Bulkloader	Update data model, CRM processes, cata- logs and roles		OP

# A

## **Changed Designer Units for ISI Version 4**

Designer Unit	Name	Description
Field- Group	A001	Updated Control "Details"
Field- Group	A031	Updated Control "Details"
Field- Group	A034	Updated Control "Details"
Field- Group	A1	Updated Control "Details"
Field- Group	AP	Updated Control "Details"
Field- Group	AU	Updated Control "Details"
Field- Group	AU	Updated Control "Search"
Field- Group	CORE_CP_GeoPlanVisit	Deleted Control "Details"
Field- Group	CORE_CP_GeoPlanVisit	Deleted Control "List"
Field- Group	CORE_CP_GeoPlanVisit	Deleted Control "Search"
Field- Group	CORE_CP_GeoPlanVisit	Updated Control "MiniDetails"

Designer Unit	Name	Description
Field- Group	CORE_ES_RepProcess	Updated Control "Details"
Field- Group	CORE_MA_GeoPlanVisit	Copied Control "Details" from TE_CORE to TE_ISI
Field- Group	CORE_MA_GeoPlanVisit	Updated Control "Details"
Field- Group	FI	Deleted Control "Details"
Field- Group	FI	Updated Control "Details"
Field- Group	IB	Updated Control "Details"
Field- Group	ID	Deleted Control "Details"
Field- Group	ID	Updated Control "Details"
Field- Group	КМ	Updated Control "List"
Field- Group	MA	Updated Control "Details"
Field- Group	MA	Updated Control "List"
Field- Group	MA	Updated Control "Search"
Field- Group	MA.Report	Updated Control "Details"

Designer Unit	Name	Description
Field- Group	OJ	Updated Control "Details"
Field- Group	OP	Updated Control "Details"
Field- Group	PO	Updated Control "Details"
Field- Group	PR	Updated Control "Details"
Field- Group	TE_AP_SerialEntry_PR	Deleted Control "Edit"
Field- Group	TE_IB_GeoPlanVisit	Deleted Control "Details"
Field- Group	TE_IB_GeoPlanVisit	Deleted Control "List"
Field- Group	TE_IB_GeoPlanVisit	Deleted Control "Matchup"
Field- Group	TE_IB_GeoPlanVisit	Deleted Control "MatchupList"
Field- Group	TE_IB_GeoPlanVisit	Deleted Control "Search"
Field- Group	TE_IB_GeoPlanVisit	Updated Control "MiniDetails"
Field- Group	TE_IB_ThirdPartyProduct	Updated Control "Details"
Field- Group	TE_ID_DefineSignature	Deleted Control "Search"

Designer Unit	Name	Description
Field- Group	TE_ID_DefineWorkingHours	Deleted Control "Search"
Field- Group	TE_ID_DefineWorkingHours	Updated Control "Details"
Field- Group	TE_KM_TicketMgmt_Claim_InfoBox	Updated Control "Details"
Field- Group	TE_KM_TicketMgmt_ServiceTicket_I foBox	NUpdated Control "Details"
Field- Group	TE_KP_GeoPlanVisit	Created Control "MiniDetails"
Field- Group	TE_KP_GeoPlanVisit	Updated Control "MiniDetails"
Field- Group	TE_MA_Completed	Updated Control "Details"
Field- Group	TE_MA_Email	Updated Control "Details"
Field- Group	TE_PR_TopValues	Deleted Control "Details"
Field- Group	TE_PR_TopValues	Deleted Control "Edit"
Field- Group	TE_PR_TopValues	Updated Control "List"
Field- Group	TE_Y1_Basic	Updated Control "Details"
Field- Group	TE_Y1_Level2	Updated Control "Details"

Designer Unit	Name	Description
Field- Group	TE_Y1_Matrix	Deleted Control "Details"
Field- Group	TE_Y1_Matrix	Deleted Control "Search"
Field- Group	TE_Y1_Matrix	Updated Control "List"
Field- Group	TE_Y1_Matrix	Updated Control "MiniDetails"
Field- Group	TE_Y1_Matrix	Updated description
Field- Group	TPR2	Updated Control "Details"
Field- Group	TPR3	Updated Control "Details"
Field- Group	U014	Deleted Control "List"
Field- Group	UP	Updated Control "Details"
Field- Group	WR	Updated Control "Details"
Field- Group	Υ1	Copied Control "List" from TE_ISI to User_TEST_ChildOf_CU_Cus- tomer
Field- Group	Y1	Deleted Control "List"

Designer Unit	Name	Description
Field- Group	Y1	Updated Control "List"
Field- Group	Y5	Updated Control "Details"

## **Changed Designer Units for ISI Version 5**

Designer Unit	Name	Description
FieldGroup	KP:Placeholders	Updated Control "Details"
FieldGroup	A001	Updated Control "Details"
FieldGroup	A031	Updated Control "Details"
FieldGroup	A034	Updated Control "Details"
FieldGroup	A034	Updated Control "Edit"
FieldGroup	A034	Updated Control "Search"
FieldGroup	A1	Updated Control "Details"
FieldGroup	A1	Updated Control "Search"
FieldGroup	AK	Deleted Control "List"
FieldGroup	AN	NULL
FieldGroup	AR	Updated Control "Details"
FieldGroup	AR	Updated Control "Search"
FieldGroup	AU	Updated Control "Details"
FieldGroup	AU	Updated Control "List"
FieldGroup	AU	Updated Control "Search"
FieldGroup	СМ	NULL

Designer Unit	Name	Description
FieldGroup	CORE_A034_FI_link	Updated Control "Details"
FieldGroup	CORE_CM_Templates	Deleted Control "List"
FieldGroup	СР	NULL
FieldGroup	СР	Copied Control "List" from UP- DATE_DEFAULT to TE_ISI
FieldGroup	СР	Copied Control "Search" from UP- DATE_DEFAULT to TE_ISI
FieldGroup	СР	Created Control "Details"
FieldGroup	СР	Created Control "List"
FieldGroup	СР	Deleted Control "Search"
FieldGroup	СР	Updated Control "Details"
FieldGroup	СР	Updated Control "List"
FieldGroup	FI	Copied Control "Details" from TE_ISI to CU_Customer
FieldGroup	FI	Copied Control "List" from TE_CORE to TE_ISI
FieldGroup	FI	Deleted Control "Details"
FieldGroup	FI	Deleted Control "List"
FieldGroup	FI	Updated Control "Details"
FieldGroup	FI	Updated Control "List"
FieldGroup	FI	Updated Control "MiniDetails"
FieldGroup	FI	Updated Control "Search"

Designer Unit	Name	Description
FieldGroup	FITree	Updated Control "MiniDetails"
FieldGroup	FV	Created Control "List"
FieldGroup	FV	Updated Control "List"
FieldGroup	ID	Updated Control "Details"
FieldGroup	ID	Updated Control "Search"
FieldGroup	IS	NULL
FieldGroup	IS	Copied Control "List" from UP- DATE_DEFAULT to TE_ISI
FieldGroup	IS	Updated Control "List"
FieldGroup	КМ	Updated Control "Details"
FieldGroup	КМ	Updated Control "List"
FieldGroup	КМ	Updated Control "Search"
FieldGroup	KM_FI	Updated Control "Search"
FieldGroup	KP	Copied Control "Matchup" from UP- DATE_DEFAULT to TE_ISI
FieldGroup	KP	Copied Control "MatchupList" from UPDATE_DEFAULT to TE_ISI
FieldGroup	KP	Deleted Control "List"
FieldGroup	KP	Deleted Control "Matchup"
FieldGroup	KP	Deleted Control "MatchupList"
FieldGroup	КР	Updated Control "Details"

Designer Unit	Name	Description
FieldGroup	КР	Updated Control "Edit"
FieldGroup	KP	Updated Control "List"
FieldGroup	KP	Updated Control "Matchup"
FieldGroup	KP	Updated Control "MatchupList"
FieldGroup	KP	Updated Control "MiniDetails"
FieldGroup	KP	Updated Control "Search"
FieldGroup	М3	Updated Control "Search"
FieldGroup	МА	Updated Control "Details"
FieldGroup	МА	Updated Control "Edit"
FieldGroup	МА	Updated Control "List"
FieldGroup	МА	Updated Control "Search"
FieldGroup	NO	Updated Control "Details"
FieldGroup	OJ	Updated Control "Search"
FieldGroup	ON	Updated Control "Details"
FieldGroup	PE	NULL
FieldGroup	PE	Copied Control "Details" from UP- DATE_DEFAULT to TE_ISI
FieldGroup	PE	Copied Control "List" from UP- DATE_DEFAULT to TE_ISI
FieldGroup	PE	Copied Control "MiniDetails" from UPDATE_DEFAULT to TE_ISI

Designer Unit	Name	Description
FieldGroup	PE	Copied Control "Search" from UP- DATE_DEFAULT to TE_ISI
FieldGroup	PE	Deleted Control "Search"
FieldGroup	PE	Updated Control "Details"
FieldGroup	PE	Updated Control "List"
FieldGroup	PE	Updated Control "MiniDetails"
FieldGroup	PE	Updated Control "Search"
FieldGroup	PO	Updated Control "Details"
FieldGroup	PR	Updated Control "Details"
FieldGroup	PR	Updated Control "List"
FieldGroup	TE_A1_SublistKP	NULL
FieldGroup	TE_A1_SublistKP	Deleted Control "Details"
FieldGroup	TE_A1_SublistKP	Deleted Control "Search"
FieldGroup	TE_A1_SublistKP	Updated description
FieldGroup	TE_AP_SerialEntry_SP	Updated Control "Edit"
FieldGroup	TE_AR_SerialEntry	Created Control "Edit"
FieldGroup	TE_AR_SerialEntry	Updated Control "Edit"
FieldGroup	TE_AR_SerialEntry	Updated Control "List"
FieldGroup	TE_AR_SerialEntry_PR	Updated Control "List"
FieldGroup	TE_AR_SerialEntry_PR[V1]	NULL

Designer Unit	Name	Description
FieldGroup	TE_AR_SerialEntry_PR[V1]	Updated Control "List"
FieldGroup	TE_AR_SerialEntry_PR[V1]	Updated description
FieldGroup	TE_AU_Select	Updated Control "List"
FieldGroup	TE_CP_SublistKP	NULL
FieldGroup	TE_CP_SublistKP	Copied Control "Details" from UP- DATE_DEFAULT to TE_ISI
FieldGroup	TE_CP_SublistKP	Created Control "Details"
FieldGroup	TE_CP_SublistKP	Deleted Control "Details"
FieldGroup	TE_CP_SublistKP	Deleted Control "List"
FieldGroup	TE_CP_SublistKP	Deleted Control "Search"
FieldGroup	TE_CP_SublistKP	Updated Control "Details"
FieldGroup	TE_CP_SublistKP	Updated Control "List"
FieldGroup	TE_CP_SublistKP	Updated Control "MiniDetails"
FieldGroup	TE_CP_SublistKP	Updated description
FieldGroup	TE_FI_Service_Search	Updated Control "Search"
FieldGroup	TE_ID_DefineSignature	Deleted Control "Search"
FieldGroup	TE_ID_DefineWorkingHours	NULL
FieldGroup	TE_ID_DefineWorkingHours	Deleted Control "Search"
FieldGroup	TE_ID_DefineWorkingHours	Updated Control "Details"
FieldGroup	TE_IS_SubList	NULL

Designer Unit	Name	Description
FieldGroup	TE_IS_SubList	Deleted Control "Details"
FieldGroup	TE_IS_SubList	Deleted Control "MiniDetails"
FieldGroup	TE_IS_SubList	Deleted Control "Search"
FieldGroup	TE_IS_SubList	Updated Control "List"
FieldGroup	TE_KM_Dispatching_Dashboard	Updated Control "Search"
FieldGroup	TE_KM_Info_Serial	NULL
FieldGroup	TE_KM_Info_Serial	Deleted Control "Edit"
FieldGroup	TE_KM_Info_Serial	Deleted Control "List"
FieldGroup	TE_KM_Info_Serial	Deleted Control "MiniDetails"
FieldGroup	TE_KM_Info_Serial	Deleted Control "Search"
FieldGroup	TE_KM_Info_Serial	Updated Control "Details"
FieldGroup	TE_KP_all_CP	NULL
FieldGroup	TE_KP_all_CP	Updated Control "Details"
FieldGroup	TE_KP_FI	Updated Control "List"
FieldGroup	TE_KP_FI	Updated Control "Search"
FieldGroup	TE_KP_New	Updated Control "Edit"
FieldGroup	TE_KP_Service_Search	Updated Control "List"
FieldGroup	TE_KP_Service_Search	Updated Control "Search"
FieldGroup	TE_MA_Completed	Updated Control "Details"
FieldGroup	TE_MA_Completed	Updated Control "Search"

Designer Unit	Name	Description
FieldGroup	TE_MA_Email	Updated Control "Details"
FieldGroup	TE_MA_New	Updated Control "Edit"
FieldGroup	TE_MA_New_FromList	Updated Control "Edit"
FieldGroup	TE_MA_SublistKP	NULL
FieldGroup	TE_MA_SublistKP	Deleted Control "Details"
FieldGroup	TE_MA_SublistKP	Deleted Control "Search"
FieldGroup	TE_MA_SublistKP	Updated Control "List"
FieldGroup	TE_MA_SublistKP	Updated description
FieldGroup	TE_MA_Visit	Updated Control "Details"
FieldGroup	TE_MA_Visit	Updated Control "Edit"
FieldGroup	TE_MA_Weekplanning	Updated Control "List"
FieldGroup	TE_NO_AddToY1	Updated Control "Details"
FieldGroup	TE_OJ_Service_Search	Updated Control "Search"
FieldGroup	TE_PE_Tree	NULL
FieldGroup	TE_PE_Tree	Created Control "MiniDetails"
FieldGroup	TE_PE_Tree	Updated Control "MiniDetails"
FieldGroup	TE_PE_Tree	Updated description
FieldGroup	TE_PR_Info_Serial	NULL
FieldGroup	TE_PR_Info_Serial	Copied Control "Details" from TE_ISI_TABLET to CU_ISI_TABLET
Designer Unit	Name	Description
------------------	--------------------------------------	-------------------------------
FieldGroup	TE_PR_Info_Serial	Created Control "Details"
FieldGroup	TE_PR_Info_Serial	Created Control "List"
FieldGroup	TE_PR_Info_Serial	Created Control "Matchup"
FieldGroup	TE_PR_Info_Serial	Deleted Control "Details"
FieldGroup	TE_PR_Info_Serial	Deleted Control "Edit"
FieldGroup	TE_PR_Info_Serial	Deleted Control "List"
FieldGroup	TE_PR_Info_Serial	Deleted Control "Matchup"
FieldGroup	TE_PR_Info_Serial	Deleted Control "MiniDetails"
FieldGroup	TE_PR_Info_Serial	Deleted Control "Search"
FieldGroup	TE_PR_Info_Serial	Updated Control "Details"
FieldGroup	TE_PR_OfferMgmt_LostEnter- Reason	Updated Control "Details"
FieldGroup	TE_PR_Select	Updated Control "List"
FieldGroup	TE_TPR2_QuickView	Updated Control "Details"
FieldGroup	TE_TPR3_Info_Serial	NULL
FieldGroup	TE_TPR3_Info_Serial	Deleted Control "Edit"
FieldGroup	TE_TPR3_Info_Serial	Deleted Control "List"
FieldGroup	TE_TPR3_Info_Serial	Deleted Control "MiniDetails"
FieldGroup	TE_TPR3_Info_Serial	Deleted Control "Search"
FieldGroup	TE_TPR3_Info_Serial	Updated Control "Details"

Designer Unit	Name	Description
FieldGroup	TE_U022_SerialEntry	Updated Control "Edit"
FieldGroup	TE_Y1_Basic	Updated Control "Search"
FieldGroup	TE_Y1_FI	Updated Control "List"
FieldGroup	TE_Y1_Level2	Updated Control "Details"
FieldGroup	TE_Y1_Service_Search	Updated Control "Search"
FieldGroup	TE_Y3_AddToY1_WIN	Updated Control "Details"
FieldGroup	TFI1	Updated Control "Details"
FieldGroup	TFI1:Placeholders	NULL
FieldGroup	TFI1:Placeholders	Created Control "Details"
FieldGroup	TFI1:Placeholders	Updated Control "Details"
FieldGroup	TPR2	Updated Control "Details"
FieldGroup	VB	Updated Control "Search"
FieldGroup	WR	Updated Control "Search"
FieldGroup	Y1	Copied Control "List" from TE_ISI to User_TEST_ChildOf_CU_Customer
FieldGroup	Y1	Updated Control "List"
FieldGroup	Y1	Updated Control "Search"
FieldGroup	Y3	Updated Control "Details"

## **Change Designer Units for LSI Version 4**

Designer Unit	Name	Description
FieldGroup	A1	Updated Control "Details"
FieldGroup	AF	Updated Control "Details"
FieldGroup	AR	Updated Control "Details"
FieldGroup	AU	Updated Control "Details"
FieldGroup	В4	Updated Control "Details"
FieldGroup	BP	Updated Control "Details"
FieldGroup	CORE_CP_Geo	Updated Control "Details"
FieldGroup	CORE_ES_RepProcess	Updated Control "Details"
FieldGroup	CORE_FI_Geo	Updated Control "Details"
FieldGroup	CORE_ID_RepProcess	Updated Control "Details"
FieldGroup	CORE_KP_RepProcess	Updated Control "Details"
FieldGroup	СР	Updated Control "Details"
FieldGroup	D1	Updated Control "Details"
FieldGroup	D1.Upload	Updated Control "Details"
FieldGroup	ES	Updated Control "Details"
FieldGroup	FI	Updated Control "Details"

Designer Unit	Name	Description
FieldGroup	FIMergeOverview	Updated Control "Details"
FieldGroup	IDUserList	Updated Control "Details"
FieldGroup	КМ	Updated Control "Details"
FieldGroup	КР	Updated Control "Details"
FieldGroup	МА	Updated Control "Details"
FieldGroup	MACalendar	Updated Control "Details"
FieldGroup	MACallExecution	Updated Control "Details"
FieldGroup	МК	Updated Control "Details"
FieldGroup	PEMergeOverview	Updated Control "Details"
FieldGroup	PESelect	Updated Control "Details"
FieldGroup	SB	Updated Control "Details"
FieldGroup	TE_AF_FollowUp_Obj	Updated Control "Details"
FieldGroup	TE_B5_Edit	Updated Control "Details"
FieldGroup	TE_CDoc_MedicalRe- quest_Execute	Updated Control "Details"
FieldGroup	TE_CP_FITree	Updated Control "Details"
FieldGroup	TE_CP_PETree	Updated Control "Details"
FieldGroup	TE_PE_PhoneReachability	Updated Control "Details"
FieldGroup	TE_U046_CP	Updated Control "Details"
FieldGroup	TE_U046_CPRelated	Updated Control "Details"

Designer Unit	Name	Description
FieldGroup	TE_U046_FI	Updated Control "Details"
FieldGroup	TE_U046_FI_Duplicate	Updated Control "Details"
FieldGroup	TE_U046_FITree	Updated Control "Details"
FieldGroup	TE_U046_PE	Updated Control "Details"
FieldGroup	TE_U046_PE_Duplicate	Updated Control "Details"
FieldGroup	TE_U046_PETree	Updated Control "Details"
FieldGroup	U007	Updated Control "Details"
FieldGroup	U011	Updated Control "Details"
FieldGroup	U022	Updated Control "Details"
FieldGroup	U042	Updated Control "Details"
FieldGroup	U046	Updated Control "Details"
FieldGroup	U047	Updated Control "Details"
FieldGroup	U049	Updated Control "Details"
FieldGroup	U064	Updated Control "Details"
FieldGroup	U065	Updated Control "Details"
FieldGroup	US	Updated Control "Details"
FieldGroup	ZA	Updated Control "Details"
FieldGroup	PESelect	Created Control "Details"
FieldGroup	U065	Created Control "Details"
FieldGroup	A035	Created Control "Details"

Designer Unit	Name	Description
FieldGroup	U064	Created Control "Details"
FieldGroup	CORE_CP_Geo	Created Control "Details"
FieldGroup	CORE_FI_Geo	Created Control "Details"
FieldGroup	A1	Updated Control "List"
FieldGroup	BP.SerialEntry	Updated Control "List"
FieldGroup	CORE_KP_RepProcess	Updated Control "List"
FieldGroup	CORE_R2_RepProcess	Updated Control "List"
FieldGroup	CP	Updated Control "List"
FieldGroup	D1	Updated Control "List"
FieldGroup	FISelect	Updated Control "List"
FieldGroup	FT	Updated Control "List"
FieldGroup	ID	Updated Control "List"
FieldGroup	IDDefaultValues	Updated Control "List"
FieldGroup	МА	Updated Control "List"
FieldGroup	PE	Updated Control "List"
FieldGroup	PESelect	Updated Control "List"
FieldGroup	SB	Updated Control "List"
FieldGroup	SR	Updated Control "List"
FieldGroup	TE_A1_CDoc	Updated Control "List"

Designer Unit	Name	Description
FieldGroup	TE_AF_CDoc_Fol- lowUp_Obj	Updated Control "List"
FieldGroup	TE_AF_CDoc_MarketingObj	Updated Control "List"
FieldGroup	TE_BV_Transaction	Updated Control "List"
FieldGroup	TE_CDoc_MedicalRe- quest_Execute	Updated Control "List"
FieldGroup	TE_CDoc_Order_Overview	Updated Control "List"
FieldGroup	TE_CP_FITree	Updated Control "List"
FieldGroup	TE_CP_PETree	Updated Control "List"
FieldGroup	TE_D3_CDoc	Updated Control "List"
FieldGroup	TE_FI_RepProcess	Updated Control "List"
FieldGroup	TE_MA_CDoc_Calls_Overvi	eunpdated Control "List"
FieldGroup	TE_MA_CDoc_Overview_La Calls	stpdated Control "List"
FieldGroup	TE_MA_Error	Updated Control "List"
FieldGroup	TE_SB_AppMenu	Updated Control "List"
FieldGroup	TE_U046_CP	Updated Control "List"
FieldGroup	TE_U046_CPRelated	Updated Control "List"
FieldGroup	TE_U046_FI	Updated Control "List"
FieldGroup	TE_U046_FITree	Updated Control "List"
FieldGroup	TE_U046_PE	Updated Control "List"

Designer Unit	Name	Description
FieldGroup	TE_U046_PETree	Updated Control "List"
FieldGroup	TE_U500_Deactivate	Updated Control "List"
FieldGroup	U042	Updated Control "List"
FieldGroup	U046	Updated Control "List"
FieldGroup	U049	Updated Control "List"
FieldGroup	U064	Updated Control "List"
FieldGroup	U065	Updated Control "List"
FieldGroup	Z5ClientReport	Updated Control "List"
FieldGroup	Z5ClientReport	Created Control "List"
FieldGroup	U065	Created Control "List"
FieldGroup	TE_MA_Error	Created Control "List"
FieldGroup	U064	Created Control "List"
FieldGroup	FIAdditionalAddressCopy- Fields	Created Control "List"
FieldGroup	TE_CDoc_Order_Overview	Created Control "List"
TreeView	FI	Deleted POS Material filter Added A1 and KM node
		Removed "Check Children" and "Show Count" for U046
TreeView	PE	Added U046 node Removed "Check Children" and "Show Count" for U046

## Changed Designer Unit for LSI Version 5

Designer Unit	Name	Description
FieldGroup	00ClientReport	NULL
FieldGroup	00ClientReport	Created Control "List"
FieldGroup	00ClientReport	Updated Control "List"
FieldGroup	A1	Copied Control "Details" from TE_LSI to PLAYGROUND
FieldGroup	A1	Deleted Control "Details"
FieldGroup	A1	Updated Control "Details"
FieldGroup	A1	Updated Control "Edit"
FieldGroup	A1	Updated Control "List"
FieldGroup	AAPricing	Copied Control "List" from update.tablet to TE_LSI_tablet
FieldGroup	AAPricing	Updated Control "List"
FieldGroup	AF	Updated Control "Details"
FieldGroup	AFFollowUp	Updated Control "Details"
FieldGroup	AFFollowUp	Updated Control "Edit"
FieldGroup	AFObjectivesActivity	Updated Control "Edit"
FieldGroup	AG	Copied Control "Details" from TE_CORE to TE_LSI

Designer Unit	Name	Description
FieldGroup	AG	Updated Control "Details"
FieldGroup	AG	Updated Control "List"
FieldGroup	AK	Updated Control "Details"
FieldGroup	АК	Updated Control "List"
FieldGroup	AR	Updated Control "Details"
FieldGroup	AROrderSerialEntry	Updated Control "List"
FieldGroup	ARSampleSerialEntry	Updated Control "List"
FieldGroup	ARSerialEntry	Updated Control "List"
FieldGroup	AU	Updated Control "Details"
FieldGroup	AU	Updated Control "Edit"
FieldGroup	AUSearch	Updated Control "MiniDetails"
FieldGroup	AUSerialEntry	Copied Control "Details" from TE_LSI_tablet to TE_LSI_tablet
FieldGroup	AUSerialEntry	Created Control "Details"
FieldGroup	AUSerialEntry	Deleted Control "Details"
FieldGroup	AUSerialEntry	Updated Control "Details"
FieldGroup	B2	Updated Control "Details"
FieldGroup	B2	Updated Control "List"
FieldGroup	BESerialEntry	Created Control "Details"
FieldGroup	BESerialEntry	Deleted Control "Details"

Designer Unit	Name	Description
FieldGroup	BESerialEntry	Updated Control "Details"
FieldGroup	СМ	NULL
FieldGroup	СМ	Copied Control "Details" from TE_CORE to TE_LSI
FieldGroup	СМ	Updated Control "Details"
FieldGroup	CORE_ES_RepProcess	Updated Control "Details"
FieldGroup	CORE_FI_GeoPlanVisit	Updated Control "MiniDetails"
FieldGroup	CORE_ID_RepProcess	Updated Control "Details"
FieldGroup	CORE_V1_KP	NULL
FieldGroup	CORE_V1_KP	Copied Control "Details" from TE_CORE to TE_LSI
FieldGroup	СР	Updated Control "Details"
FieldGroup	СР	Updated Control "Edit"
FieldGroup	СР	Updated Control "List"
FieldGroup	СР	Updated Control "MiniDetails"
FieldGroup	CPFromFI	Updated Control "List"
FieldGroup	CPFromFI	Updated Control "MiniDetails"
FieldGroup	CS_SecondaryDisplaySerialEr try	NULL
FieldGroup	D1	Updated Control "Details"
FieldGroup	D1.Upload	Copied Control "Details" from UP- DATE_DEFAULT to TE_LSI

Designer Unit	Name	Description
FieldGroup	D1.Upload	Deleted Control "Details"
FieldGroup	D1.Upload	Updated Control "Details"
FieldGroup	FI	Copied Control "Details" from TE_LSI_tablet to TE_CG_tablet
FieldGroup	FI	Deleted Control "Details"
FieldGroup	FI	Updated Control "Details"
FieldGroup	FI	Updated Control "List"
FieldGroup	FI	Updated Control "MiniDetails"
FieldGroup	FI	Updated Control "Search"
FieldGroup	FIListing	Updated Control "List"
FieldGroup	FIMergeOverview	Copied Control "Details" from UP- DATE_DEFAULT to TE_LSI
FieldGroup	FIMergeOverview	Deleted Control "Details"
FieldGroup	FIMergeOverview	Updated Control "Details"
FieldGroup	IA	Updated Control "Details"
FieldGroup	ID	Copied Control "Details" from UP- DATE_DEFAULT to TE_LSI
FieldGroup	ID	Deleted Control "Details"
FieldGroup	IDClientReport	NULL
FieldGroup	IDClientReport	Created Control "List"
FieldGroup	IDClientReport	Updated Control "List"

Designer Unit	Name	Description
FieldGroup	IDDefaultValues	Created Control "Search"
FieldGroup	IDDefaultValues	Updated Control "List"
FieldGroup	IDDefaultValues	Updated Control "Search"
FieldGroup	IDUserList	Updated Control "Details"
FieldGroup	IT	Updated Control "Details"
FieldGroup	КМ	Copied Control "Details" from TE_LSI to XX_LSI_Country_Customer
FieldGroup	КМ	Copied Control "Edit" from TE_LSI_tablet to TE_CG_tablet
FieldGroup	КМ	Deleted Control "Details"
FieldGroup	КМ	Deleted Control "Edit"
FieldGroup	КМ	Updated Control "Details"
FieldGroup	КМ	Updated Control "List"
FieldGroup	КМ	Updated Control "MiniDetails"
FieldGroup	КМ	Updated Control "Search"
FieldGroup	КР	Copied Control "Details" from UP- DATE_DEFAULT to TE_LSI
FieldGroup	КР	Deleted Control "Details"
FieldGroup	KPSelect	Updated Control "Search"
FieldGroup	LDSerialEntry	Copied Control "List" from update.tablet to TE_LSI_tablet
FieldGroup	LDSerialEntry	Updated Control "List"

Designer Unit	Name	Description
FieldGroup	LPSerialEntry	Copied Control "Edit" from update.tablet to TE_LSI_tablet
FieldGroup	LPSerialEntry	Updated Control "Edit"
FieldGroup	LS	Updated Control "Details"
FieldGroup	LSListing	Updated Control "List"
FieldGroup	MA	Copied Control "List" from TE_LSI to TE_CONSUMERGOODS
FieldGroup	МА	Updated Control "Details"
FieldGroup	MA	Updated Control "Edit"
FieldGroup	МА	Updated Control "List"
FieldGroup	MACalendar	Created Control "Details"
FieldGroup	MACalendar	Created Control "List"
FieldGroup	MACalendar	Deleted Control "Details"
FieldGroup	MACalendar	Deleted Control "List"
FieldGroup	MACalendar	Updated Control "Details"
FieldGroup	MACalendar	Updated Control "Edit"
FieldGroup	MACalendar	Updated Control "List"
FieldGroup	MACallExecution	Updated Control "Details"
FieldGroup	MACallExecution	Updated Control "Edit"
FieldGroup	MACallExecution[V1]	NULL
FieldGroup	MACallExecution[V1]	Updated Control "Details"

Designer Unit	Name	Description
FieldGroup	MAParentDefaults	Updated Control "List"
FieldGroup	MASearch	Updated Control "List"
FieldGroup	MASearch	Updated Control "MiniDetails"
FieldGroup	MASerialEntry	Created Control "Details"
FieldGroup	MASerialEntry	Updated Control "Details"
FieldGroup	MUSerialEntry	Created Control "Details"
FieldGroup	MUSerialEntry	Deleted Control "Details"
FieldGroup	MUSerialEntry	Updated Control "Details"
FieldGroup	MUSerialEntry	Updated Control "Edit"
FieldGroup	РВ	Updated Control "Details"
FieldGroup	PB	Updated Control "Edit"
FieldGroup	PBListing	Updated Control "List"
FieldGroup	PE	Deleted Control "List"
FieldGroup	PE	Updated Control "Details"
FieldGroup	PE	Updated Control "List"
FieldGroup	PE	Updated Control "MiniDetails"
FieldGroup	PE	Updated Control "Search"
FieldGroup	PEMergeOverview	NULL
FieldGroup	PEMergeOverview	Copied Control "Details" from UP- DATE_DEFAULT to TE_LSI

Designer Unit	Name	Description
FieldGroup	PEMergeOverview	Updated Control "Details"
FieldGroup	PLPricing	Updated Control "List"
FieldGroup	PPSerialEntry	Updated Control "Edit"
FieldGroup	PPSerialEntry	Updated Control "List"
FieldGroup	PS	Copied Control "Edit" from TE_LSI_tablet to TE_CG_tablet
FieldGroup	PS	Deleted Control "Edit"
FieldGroup	PS	Updated Control "Edit"
FieldGroup	PSCopyFields	Updated Control "List"
FieldGroup	PSSerialEntry	Created Control "Details"
FieldGroup	PSSerialEntry	Updated Control "Details"
FieldGroup	recover:A032	NULL
FieldGroup	recover:AD	NULL
FieldGroup	recover:AF	NULL
FieldGroup	recover:AF	Deleted Control "List"
FieldGroup	recover:AR	NULL
FieldGroup	recover:AT	NULL
FieldGroup	recover:AU	NULL
FieldGroup	recover:B2	NULL
FieldGroup	recover:CM	NULL

Designer Unit	Name	Description
FieldGroup	recover:CP	NULL
FieldGroup	recover:FI	NULL
FieldGroup	recover:KM	NULL
FieldGroup	recover:KP	NULL
FieldGroup	recover:LS	NULL
FieldGroup	recover:MA	NULL
FieldGroup	recover:R3	NULL
FieldGroup	recover:TD	NULL
FieldGroup	recover:TE_CDoc_MedicalRe- quest_Execute	NULL
FieldGroup	recover:TE_CP_FITree	NULL
FieldGroup	recover:TE_FI_BulkListing	NULL
FieldGroup	recover:TE_LS_DeactivateList ings	NULL
FieldGroup	recov- er:TE_MA_CDoc_Calls_Overv	NULL iew
FieldGroup	recov- er:TE_MA_CDoc_Calls_Overv	Deleted Control "List" iew
FieldGroup	recover:TE_U500_JobCards	NULL
FieldGroup	recover:U019	NULL
FieldGroup	recover:U035	NULL
FieldGroup	recover:U049	NULL

Designer Unit	Name	Description
FieldGroup	recover:U067	NULL
FieldGroup	recover:U068	NULL
FieldGroup	recover:UP	NULL
FieldGroup	recover:VR	NULL
FieldGroup	SB	Copied Control "Search" from UP- DATE_DEFAULT to TE_LSI
FieldGroup	SB	Deleted Control "Search"
FieldGroup	SB	Updated Control "Details"
FieldGroup	SB	Updated Control "List"
FieldGroup	SB	Updated Control "Search"
FieldGroup	SB_Backup_20140616	NULL
FieldGroup	SB_Backup_20140616	Updated description
FieldGroup	TD	Updated Control "Details"
FieldGroup	TD	Updated Control "List"
FieldGroup	TE_AASerialEntry	Updated Control "List"
FieldGroup	TE_AF_FollowUp_Obj	Updated Control "Details"
FieldGroup	TE_AF_SalesCycle	NULL
FieldGroup	TE_AF_SalesCycle	Created Control "Details"
FieldGroup	TE_AF_SalesCycle	Created Control "Search"
FieldGroup	TE_AF_SalesCycle	Deleted Control "Details"

Designer Unit	Name	Description
FieldGroup	TE_AF_SalesCycle	Updated Control "List"
FieldGroup	TE_AF_SalesCycle	Updated Control "Search"
FieldGroup	TE_AFQuestionnaire	NULL
FieldGroup	TE_AFQuestionnaire	Created Control "List"
FieldGroup	TE_AFQuestionnaire	Updated Control "List"
FieldGroup	TE_AK_JobCards	Updated Control "Details"
FieldGroup	TE_ARSelect	NULL
FieldGroup	TE_ARSelect	Created Control "List"
FieldGroup	TE_ARSelect	Created Control "Search"
FieldGroup	TE_ARSelect	Updated Control "List"
FieldGroup	TE_ARSelect	Updated Control "Search"
FieldGroup	TE_AUSerialEntryInfoPanel	NULL
FieldGroup	TE_AUSerialEntryInfoPanel	Created Control "Details"
FieldGroup	TE_AUSerialEntryInfoPanel	Updated Control "Details"
FieldGroup	TE_CDoc_MedicalRequest_Ex ecute	Updated Control "Search"
FieldGroup	TE_CDoc_Order_Overview	NULL
FieldGroup	TE_CDoc_POSMateri- al_Overview	NULL
FieldGroup	TE_CDoc_POSMateri- al_Overview	Deleted Control "Details"

Designer Unit	Name	Description
FieldGroup	TE_CDoc_POSMateri- al_Overview	Deleted Control "Search"
FieldGroup	TE_CP_FITree	Updated Control "Details"
FieldGroup	TE_CP_PETree	Updated Control "Details"
FieldGroup	TE_CPRequestForChange	NULL
FieldGroup	TE_CPRequestForChange	Created Control "Edit"
FieldGroup	TE_CPRequestForChange	Updated Control "Edit"
FieldGroup	TE_CPU046	NULL
FieldGroup	TE_CPU046	Updated Control "Details"
FieldGroup	TE_F1_SelectQuestionnaire	Created Control "Search"
FieldGroup	TE_F1_SelectQuestionnaire	Updated Control "Search"
FieldGroup	TE_FI_BulkListing	Updated Control "List"
FieldGroup	TE_FIGeoSearch	NULL
FieldGroup	TE_FIGeoSearch	Created Control "List"
FieldGroup	TE_FIGeoSearch	Updated Control "List"
FieldGroup	TE_KP_GeoPlanVisit	NULL
FieldGroup	TE_KP_GeoPlanVisit	Deleted Control "Details"
FieldGroup	TE_KP_GeoPlanVisit	Deleted Control "List"
FieldGroup	TE_KP_GeoPlanVisit	Deleted Control "Matchup"
FieldGroup	TE_KP_GeoPlanVisit	Deleted Control "MatchupList"

Designer Unit	Name	Description
FieldGroup	TE_KP_GeoPlanVisit	Deleted Control "Search"
FieldGroup	TE_KP_GeoPlanVisit	Updated Control "MiniDetails"
FieldGroup	TE_LS_DeactivateListings	Copied Control "Search" from TE_LSI to TE_LSI
FieldGroup	TE_LS_DeactivateListings	Created Control "Details"
FieldGroup	TE_LS_DeactivateListings	Deleted Control "List"
FieldGroup	TE_LS_DeactivateListings	Deleted Control "MiniDetails"
FieldGroup	TE_LS_DeactivateListings	Deleted Control "Search"
FieldGroup	TE_LS_DeactivateListings	Updated Control "Details"
FieldGroup	TE_LS_DeactivateListings	Updated Control "List"
FieldGroup	TE_LS_DeactivateListings	Updated Control "Search"
FieldGroup	TE_LS_DeactivateListings	Updated description
FieldGroup	TE_MA_CDoc_Calls_Overview	NULL
FieldGroup	TE_MA_CDoc_Calls_Overview	Deleted Control "Details"
FieldGroup	TE_MA_CDoc_Calls_Overview	Deleted Control "List"
FieldGroup	TE_MA_CDoc_Calls_Overview	Deleted Control "MiniDetails"
FieldGroup	TE_MA_CDoc_Calls_Overview	Deleted Control "Search"
FieldGroup	TE_MAClientEmailTemplate	NULL
FieldGroup	TE_MAClientEmailTemplate	Updated Control "List"
FieldGroup	TE_PERequestForChange	NULL

Designer Unit	Name	Description
FieldGroup	TE_PERequestForChange	Created Control "Edit"
FieldGroup	TE_PERequestForChange	Updated Control "Edit"
FieldGroup	TE_PEU046	NULL
FieldGroup	TE_PEU046	Updated Control "Details"
FieldGroup	TE_PEU046	Updated Control "List"
FieldGroup	TE_PP_InfoPanel	NULL
FieldGroup	TE_PP_SalesCycle	NULL
FieldGroup	TE_PP_SalesCycle	Updated Control "List"
FieldGroup	TE_PP_SalesCycle	Updated description
FieldGroup	TE_PPInfoPanel	NULL
FieldGroup	TE_PPInfoPanel	Created Control "List"
FieldGroup	TE_PPInfoPanel	Updated Control "List"
FieldGroup	TE_PrimaryDisplaySerialEntry	NULL
FieldGroup	TE_SB_AppMenu	Copied Control "Search" from TE_LSI to TE_LSI
FieldGroup	TE_SB_AppMenu	Deleted Control "Search"
FieldGroup	TE_SB_AppMenu	Updated Control "List"
FieldGroup	TE_SB_AppMenu	Updated Control "Search"
FieldGroup	TE_SB_AppMenu_Back- up_20140617	NULL

Designer Unit	Name	Description
FieldGroup	TE_SB_AppMenu_Back- up_20140617	Updated description
FieldGroup	TE_SB_DayWeekPI	Updated description
FieldGroup	TE_SecondaryDisplaySerialEr try	NULL
FieldGroup	TE_SerialEntryInfoPanel	NULL
FieldGroup	TE_U007_DayWeekPlanning	Deleted Control "Details"
FieldGroup	TE_U061_BulkListing	Updated Control "Details"
FieldGroup	TE_U500_BulkListing.SerialEr try	⊌pdated Control "List"
FieldGroup	TE_U500_BulkListing.SerialEr try	Updated description
FieldGroup	TE_U500_Deactivate	Copied Control "List" from TE_LSI to TE_LSI
FieldGroup	TE_U500_Deactivate	Deleted Control "List"
FieldGroup	TE_U500_Deactivate	Deleted Control "Search"
FieldGroup	TE_U500_Deactivate	Updated Control "List"
FieldGroup	TE_U500_Deactivate	Updated Control "Search"
FieldGroup	TE_U500_Deactivate	Updated description
FieldGroup	TE_V1_Sponsoring	NULL
FieldGroup	TE_V1_Sponsoring	Updated Control "Details"
FieldGroup	TE_VP_SalesCycle	NULL

Designer Unit	Name	Description
FieldGroup	TE_VP_SalesCycle	Updated Control "List"
FieldGroup	TE_VP_SalesCycle	Updated description
FieldGroup	U002	Updated Control "Details"
FieldGroup	U007	Updated Control "Details"
FieldGroup	U011	Updated Control "Details"
FieldGroup	U011	Updated Control "List"
FieldGroup	U016	NULL
FieldGroup	U016	Created Control "Details"
FieldGroup	U016	Created Control "List"
FieldGroup	U016	Created Control "MiniDetails"
FieldGroup	U016	Created Control "Search"
FieldGroup	U016	Updated Control "Details"
FieldGroup	U016	Updated Control "List"
FieldGroup	U016	Updated Control "MiniDetails"
FieldGroup	U016	Updated Control "Search"
FieldGroup	U016	Updated description
FieldGroup	U017	NULL
FieldGroup	U017	Created Control "Details"
FieldGroup	U017	Created Control "List"
FieldGroup	U017	Created Control "MiniDetails"

Designer Unit	Name	Description
FieldGroup	U017	Created Control "Search"
FieldGroup	U017	Updated Control "Details"
FieldGroup	U017	Updated Control "List"
FieldGroup	U017	Updated Control "MiniDetails"
FieldGroup	U017	Updated Control "Search"
FieldGroup	U022	Updated Control "Details"
FieldGroup	U030	NULL
FieldGroup	U030	Created Control "Details"
FieldGroup	U030	Created Control "List"
FieldGroup	U030	Created Control "MiniDetails"
FieldGroup	U030	Created Control "Search"
FieldGroup	U030	Updated Control "Details"
FieldGroup	U030	Updated Control "List"
FieldGroup	U030	Updated Control "MiniDetails"
FieldGroup	U030	Updated Control "Search"
FieldGroup	U030	Updated description
FieldGroup	U031	NULL
FieldGroup	U031	Created Control "Details"
FieldGroup	U031	Created Control "List"
FieldGroup	U031	Created Control "MiniDetails"

Designer Unit	Name	Description
FieldGroup	U031	Created Control "Search"
FieldGroup	U031	Updated Control "Details"
FieldGroup	U031	Updated Control "List"
FieldGroup	U031	Updated Control "MiniDetails"
FieldGroup	U031	Updated Control "Search"
FieldGroup	U031	Updated description
FieldGroup	u032	NULL
FieldGroup	U032	Created Control "Details"
FieldGroup	U032	Created Control "List"
FieldGroup	U032	Created Control "MiniDetails"
FieldGroup	U032	Created Control "Search"
FieldGroup	U032	Updated Control "Details"
FieldGroup	U032	Updated Control "List"
FieldGroup	U032	Updated Control "MiniDetails"
FieldGroup	U032	Updated Control "Search"
FieldGroup	U046	Created Control "MiniDetails"
FieldGroup	U046	Deleted Control "MiniDetails"
FieldGroup	U046	Updated Control "Details"
FieldGroup	U046	Updated Control "MiniDetails"
FieldGroup	U047	Created Control "MiniDetails"

Designer Unit	Name	Description
FieldGroup	U047	Updated Control "Details"
FieldGroup	U047	Updated Control "MiniDetails"
FieldGroup	U049	Updated Control "Details"
FieldGroup	U049	Updated Control "List"
FieldGroup	U059	Updated Control "Details"
FieldGroup	U063_KAM_DeactivateListings	NULL
FieldGroup	U063_KAM_DeactivateListings	Updated Control "List"
FieldGroup	U063_KAM_DeactivateListings	Updated description
FieldGroup	U064	NULL
FieldGroup	U064	Copied Control "Edit" from TE_LSI_tablet to TE_LSI_tablet
FieldGroup	U064	Created Control "Details"
FieldGroup	U064	Created Control "Edit"
FieldGroup	U064	Created Control "List"
FieldGroup	U064	Created Control "MiniDetails"
FieldGroup	U064	Deleted Control "Edit"
FieldGroup	U064	Updated Control "Details"
FieldGroup	U064	Updated Control "Edit"
FieldGroup	U064	Updated Control "List"
FieldGroup	U064	Updated Control "MiniDetails"

Designer Unit	Name	Description
FieldGroup	U065	NULL
FieldGroup	U065	Created Control "Details"
FieldGroup	U065	Created Control "Edit"
FieldGroup	U065	Created Control "List"
FieldGroup	U065	Created Control "Search"
FieldGroup	U065	Deleted Control "Search"
FieldGroup	U065	Updated Control "Details"
FieldGroup	U065	Updated Control "Edit"
FieldGroup	U065	Updated Control "List"
FieldGroup	U066	NULL
FieldGroup	U066	Created Control "Details"
FieldGroup	U066	Created Control "List"
FieldGroup	U066	Created Control "MiniDetails"
FieldGroup	U066	Created Control "Search"
FieldGroup	U066	Deleted Control "List"
FieldGroup	U066	Updated Control "Details"
FieldGroup	U066	Updated Control "List"
FieldGroup	U066	Updated Control "MiniDetails"
FieldGroup	U066	Updated Control "Search"
FieldGroup	U067	NULL

Designer Unit	Name	Description
FieldGroup	U067	Created Control "Details"
FieldGroup	U067	Created Control "List"
FieldGroup	U067	Created Control "Search"
FieldGroup	U067	Updated Control "Details"
FieldGroup	U067	Updated Control "List"
FieldGroup	U067	Updated Control "Search"
FieldGroup	U068	NULL
FieldGroup	U068	Created Control "Details"
FieldGroup	U068	Created Control "List"
FieldGroup	U068	Created Control "Search"
FieldGroup	U068	Updated Control "Details"
FieldGroup	U068	Updated Control "List"
FieldGroup	U068	Updated Control "Search"
FieldGroup	U069	NULL
FieldGroup	U069	Created Control "Details"
FieldGroup	U069	Created Control "List"
FieldGroup	U069	Created Control "Search"
FieldGroup	U069	Updated Control "Details"
FieldGroup	U069	Updated Control "List"
FieldGroup	U069	Updated Control "Search"

Designer Unit	Name	Description
FieldGroup	U1	NULL
FieldGroup	U1	Created Control "List"
FieldGroup	U1	Created Control "Search"
FieldGroup	U1	Updated Control "List"
FieldGroup	U1	Updated Control "Search"
FieldGroup	U500	Updated Control "Details"
FieldGroup	UPSerialEntry	Updated Control "Edit"
FieldGroup	V1	NULL
FieldGroup	V1	Copied Control "Details" from TE_CORE to TE_LSI
FieldGroup	V1	Copied Control "List" from TE_CORE to TE_LSI
FieldGroup	V1	Updated Control "Details"
FieldGroup	V1	Updated Control "List"
FieldGroup	V3	NULL
FieldGroup	V3	Copied Control "Details" from TE_CORE to TE_LSI
FieldGroup	V3	Copied Control "List" from TE_CORE to TE_LSI
FieldGroup	V3	Copied Control "Search" from TE_CORE to TE_LSI
FieldGroup	V3	Updated Control "Details"

Designer Unit	Name	Description
FieldGroup	V3	Updated Control "List"
FieldGroup	V3	Updated Control "Search"
FieldGroup	V4	NULL
FieldGroup	V4	Copied Control "Details" from TE_CORE to TE_LSI
FieldGroup	V4	Copied Control "List" from TE_CORE to TE_LSI
FieldGroup	V4	Updated Control "Details"
FieldGroup	V4	Updated Control "List"
FieldGroup	V5	NULL
FieldGroup	V5	Copied Control "Details" from TE_CORE to TE_LSI
FieldGroup	VGCopyFields	NULL
FieldGroup	VGCopyFields	Created Control "List"
FieldGroup	VGCopyFields	Updated Control "List"
FieldGroup	VGSerialEntry	Created Control "Details"
FieldGroup	VGSerialEntry	Updated Control "Details"
FieldGroup	VPSerialEntry	Updated Control "Edit"
FieldGroup	VR	NULL
FieldGroup	VR	Created Control "Details"
FieldGroup	VR	Created Control "List"

Designer Unit	Name	Description
FieldGroup	VR	Created Control "Search"
FieldGroup	VR	Deleted Control "Details"
FieldGroup	VR	Deleted Control "List"
FieldGroup	VR	Updated Control "Details"
FieldGroup	VR	Updated Control "List"
FieldGroup	VR	Updated Control "Search"
FieldGroup	VR	Updated description
FieldGroup	Y1	Updated Control "Details"
FieldGroup	ZA	Updated Control "Edit"

E

## Changed Designer Units for FSI Version 4

Designer Unit	Name	Description
Field- Group	A001	Updated Control "Details"
Field- Group	A001	Updated Control "List"
Field- Group	A029	Updated Control "Details"
Field- Group	A1	Updated Control "Details"
Field- Group	A1	Updated Control "List"
Field- Group	A1	Updated Control "Search"
Field- Group	AD	Copied Control "Details" from TE_CORE to TE_FSI
Field- Group	AD	Deleted Control "Details"
Field- Group	AG	Copied Control "Details" from TE_CORE to TE_FSI
Field- Group	AG	Updated Control "Details"

Designer Unit	Name	Description
Field- Group	AN	Copied Control "Details" from TE_CORE to TE_FSI
Field- Group	AN	Updated Control "Details"
Field- Group	ВТ	Copied Control "List" from UP- DATE_DEFAULT to TE_FSI
Field- Group	ВТ	Copied Control "MiniDetails" from UPDATE_DEFAULT to TE_FSI
Field- Group	ВТ	Updated Control "Details"
Field- Group	ВТ	Updated Control "List"
Field- Group	ВТ	Updated Control "MiniDetails"
Field- Group	CORE_V1_KP	Copied Control "Details" from TE_CORE to TE_FSI
Field- Group	СР	Updated Control "Details"
Field- Group	ES	Created Control "Details"
Field- Group	ES	Created Control "List"
Field- Group	ES	Created Control "MiniDetails"
Field- Group	ES	Created Control "Search"

Designer Unit	Name	Description
Field- Group	ES	Updated Control "Details"
Field- Group	ES	Updated Control "List"
Field- Group	ES	Updated Control "MiniDetails"
Field- Group	ES	Updated Control "Search"
Field- Group	FI	Updated Control "List"
Field- Group	FT	Copied Control "List" from UP- DATE_DEFAULT to TE_FSI
Field- Group	FT	Updated Control "List"
Field- Group	КМ	Copied Control "Details" from UP- DATE_DEFAULT to TE_FSI
Field- Group	КМ	Copied Control "MiniDetails" from UPDATE_DEFAULT to TE_FSI
Field- Group	КМ	Copied Control "Search" from UP- DATE_DEFAULT to TE_FSI
Field- Group	КМ	Updated Control "Details"
Field- Group	КМ	Updated Control "List"
Field- Group	КМ	Updated Control "MiniDetails"

Designer Unit	Name	Description
Field- Group	КМ	Updated Control "Search"
Field- Group	KM_FI	Copied Control "Details" from UP- DATE_DEFAULT to TE_FSI
Field- Group	KM_FI	Copied Control "List" from UP- DATE_DEFAULT to TE_FSI
Field- Group	KM_FI	Copied Control "MiniDetails" from UPDATE_DEFAULT to TE_FSI
Field- Group	KM_FI	Copied Control "Search" from UP- DATE_DEFAULT to TE_FSI
Field- Group	KM_FI	Updated Control "Details"
Field- Group	KM_FI	Updated Control "List"
Field- Group	KM_FI	Updated Control "MiniDetails"
Field- Group	KM_FI	Updated Control "Search"
Field- Group	KM_PE	Updated Control "Details"
Field- Group	KM_PE	Updated Control "List"
Field- Group	KM_PE	Updated Control "MiniDetails"
Field- Group	KM_PE	Updated Control "Search"
Designer Unit	Name	Description
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Field- Group	MA	Updated Control "Details"
Field- Group	PB	Updated Control "List"
Field- Group	PE	Updated Control "Details"
Field- Group	TE_A1_SubTask	Updated Control "Details"
Field- Group	TE_A1_SubTask	Updated Control "MiniDetails"
Field- Group	TE_A1_SubTask	Updated Control "Search"
Field- Group	TE_BP_ConsultancyDocumenta- tionProcess	Updated Control "Details"
Field- Group	TE_BP_ConsultancyDocumenta- tionProcess	Updated Control "List"
Field- Group	TE_BT_ConsultancyDocumenta- tion_FromFI	Updated Control "Details"
Field- Group	TE_BT_ConsultancyDocumentatio Phase3	Hypdated Control "List"
Field- Group	TE_BT_ConsultancyDocumentatio Phase4	Hypdated Control "Details"
Field- Group	TE_BT_ConsultancyDocumentatio Phase4	Hypdated Control "List"
Field- Group	TE_CP_ComplaintMgmt	Created Control "Details"

Designer Unit	Name	Description
Field- Group	TE_CP_ComplaintMgmt	Updated Control "Details"
Field- Group	TE_CP_ComplaintMgmt	Updated description
Field- Group	TE_FI_BusinessClients	Updated Control "Details"
Field- Group	TE_FI_BusinessClients	Updated Control "List"
Field- Group	TE_FI_ComplaintMgmt	Created Control "Details"
Field- Group	TE_FI_ComplaintMgmt	Updated Control "Details"
Field- Group	TE_FI_ComplaintMgmt	Updated description
Field- Group	TE_KM_Complaint- Mgmt_Phase1_CP	Updated Control "Details"
Field- Group	TE_KM_Complaint- Mgmt_Phase1_FI	Deleted Control "List"
Field- Group	TE_KM_Complaint- Mgmt_Phase1_FI	Deleted Control "MiniDetails"
Field- Group	TE_KM_Complaint- Mgmt_Phase1_FI	Deleted Control "Search"
Field- Group	TE_KM_Complaint- Mgmt_Phase1_FI	Updated Control "Details"
Field- Group	TE_KM_Complaint- Mgmt_Phase1_PE	Deleted Control "List"

Designer Unit	Name	Description
Field- Group	TE_KM_Complaint- Mgmt_Phase1_PE	Deleted Control "MiniDetails"
Field- Group	TE_KM_Complaint- Mgmt_Phase1_PE	Deleted Control "Search"
Field- Group	TE_KM_Complaint- Mgmt_Phase1_PE	Updated Control "Details"
Field- Group	TE_KM_ComplaintMgmt_Phase2	Updated Control "Details"
Field- Group	TE_KM_Complaint- Mgmt_Phase2_CP	Updated Control "Details"
Field- Group	TE_KM_Complaint- Mgmt_Phase2_FI	Updated Control "Details"
Field- Group	TE_KM_Complaint- Mgmt_Phase2_PE	Updated Control "Details"
Field- Group	TE_KM_ComplaintMgmt_Phase3	Updated Control "Details"
Field- Group	TE_KM_ComplaintMgmt_Phase4	Updated Control "Details"
Field- Group	TE_KM_ComplaintMgmt_Phase5	Updated Control "Details"
Field- Group	TE_KM_Quick	Created Control "Details"
Field- Group	TE_KM_QuickAdd	Created Control "Details"
Field- Group	TE_KM_QuickAdd	Updated Control "Details"

Designer Unit	Name	Description
Field- Group	TE_KMNew	Deleted Control "List"
Field- Group	TE_KMNew	Deleted Control "MiniDetails"
Field- Group	TE_KMNew	Deleted Control "Search"
Field- Group	TE_KMNew	Updated Control "Details"
Field- Group	TE_MA_AppMenu	Updated Control "List"
Field- Group	TE_PE_ComplaintMgmt	Created Control "Details"
Field- Group	TE_PE_ComplaintMgmt	Updated Control "Details"
Field- Group	TE_PE_ComplaintMgmt	Updated description
Field- Group	U139	Updated Control "MiniDetails"
Field- Group	U139	Updated Control "Search"
Field- Group	U140_FI	Updated Control "Details"
Field- Group	U140_FI	Updated Control "List"
Field- Group	U140_FI_GeneralInfo_Process	Updated Control "Details"

Designer Unit	Name	Description
Field- Group	U140_PE	Updated Control "Details"
Field- Group	U140_PE	Updated Control "List"
Field- Group	V1	Copied Control "Details" from TE_CORE to TE_FSI
Field- Group	V1	Updated Control "Details"
Field- Group	V3	Copied Control "Details" from TE_CORE to TE_FSI
Field- Group	V3	Updated Control "Details"
Field- Group	V4	Copied Control "Details" from TE_CORE to TE_FSI
Field- Group	V4	Updated Control "Details"
TreeView	PE	Added crm process to KM node
TreeView	PE	Added KM node
TreeView	PE	Added Record Filter "A1.TE_A1_ShowOnlyMainTasks" in the RecordFilter of A1
TreeView	PE	Added record filter to d3
TreeView	PE	Added sorting to KM
TreeView	PE	Applied sorting to MA
TreeView	PE	Changed KM Expand to KMTree

Designer Unit	Name	Description
TreeView	PE	Changed sorting
TreeView	PE	Configured CRM process
TreeView	TE_FI_Associations	Added KM
TreeView	TE_FI_Associations	Added ListParams to KM
TreeView	TE_FI_Associations	Added Record Filter "A1.TE_A1_ShowOnlyMainTasks" in the RecordFilter of A1
TreeView	TE_FI_Associations	Added sorting to KM
TreeView	TE_FI_Associations	Applied sorting order on MA
TreeView	TE_FI_Associations	Changed KM Expand to KMTree
TreeView	TE_FI_Associations	Changed KM to readonly
TreeView	TE_FI_Associations	Changed s&I and expand of KM
TreeView	TE_FI_Associations	Changed s&I and expand to KMTree
TreeView	TE_FI_Associations	Changed sorting
TreeView	TE_FI_Associations	Configured CRM process
TreeView	TE_FI_Associations	Deleted WPHG (U140) node because associations can't have contact per- son and without a CP record the WPHG process makes no sense - >Discussed with Karl Uwe
TreeView	TE_FI_Associations	Not required
TreeView	TE_FI_BusinessClients	Added KM
TreeView	TE_FI_BusinessClients	Added KP

Designer Unit	Name	Description
TreeView	TE_FI_BusinessClients	Added ListParams to KM
TreeView	TE_FI_BusinessClients	Added Record Filter "A1.TE_A1_ShowOnlyMainTasks" in the RecordFilter of A1
TreeView	TE_FI_BusinessClients	Added sorting to KM
TreeView	TE_FI_BusinessClients	Applied sorting order on MA
TreeView	TE_FI_BusinessClients	Changed KM Expand to KMTree
TreeView	TE_FI_BusinessClients	Changed KM to readonly
TreeView	TE_FI_BusinessClients	Changed s&I and expand of KM
TreeView	TE_FI_BusinessClients	Changed s&I and expand to KMTree
TreeView	TE_FI_BusinessClients	Changed sorting
TreeView	TE_FI_BusinessClients	Configured CRM process
TreeView	TE_FI_BusinessClients	Deleted KP node
TreeView	TE_FI_BusinessClients	Removed KP node

## F

## **Changed Designer Units for FSI Vesion 5**

Designer Unit	Name	Description
Field- Group	A001	Updated Control "List"
Field- Group	A029	Updated Control "Search"
Field- Group	A1	Updated Control "De- tails"
Field- Group	A1	Updated Control "List"
Field- Group	A1	Updated Control "Search"
Field- Group	AD	CopiedControl"Details" from TE_CORE to TE_FSI
Field- Group	AD	Deleted Control "De- tails"
Field- Group	AD	Updated Control "De- tails"
Field- Group	AF	Updated Control "List"
Field- Group	AG	NULL

Designer Unit	Name	Description
Field- Group	AG	CopiedControl"Details" from TE_CORE to TE_FSI
Field- Group	AG	Updated Control "De- tails"
Field- Group	AN	NULL
Field- Group	AN	CopiedControl"Details" from TE_CORE to TE_FSI
Field- Group	AN	Updated Control "De- tails"
Field- Group	CORE_ES_RepProcess	NULL
Field- Group	CORE_ES_RepProcess	CopiedControl"Details" from TE_CORE to TE_FSI
Field- Group	CORE_ES_RepProcess	Updated Control "De- tails"
Field- Group	CORE_IA_IDEAMGMT_FormEvaluation	NULL
Field- Group	CORE_IA_IDEAMGMT_FormEvaluation	Updated Control "De- tails"
Field- Group	CORE_IA_IDEAMGMT_FormEvaluation	Updated Control "List"
Field- Group	CORE_IA_IDEAMGMT_FormEvaluation	Updated Control "Search"

Designer Unit	Name	Description
Field- Group	CORE_IA_IDEAMGMT_FormRealization	NULL
Field- Group	CORE_IA_IDEAMGMT_FormRealization	Updated Control "De- tails"
Field- Group	CORE_IA_IDEAMGMT_FormRealization	Updated Control "List"
Field- Group	CORE_IA_IDEAMGMT_FormRealization	Updated Control "Search"
Field- Group	CORE_IA_IDEAMGMT_ProductManagerView	NULL
Field- Group	CORE_IA_IDEAMGMT_ProductManagerView	CopiedControl"Details" from TE_CORE to TE_FSI
Field- Group	CORE_IA_IDEAMGMT_ProductManagerView	Copied Control "List" from TE_CORE to TE_FSI
Field- Group	CORE_IA_IDEAMGMT_ProductManagerView	Updated Control "De- tails"
Field- Group	CORE_IA_IDEAMGMT_ProductManagerView	Updated Control "List"
Field- Group	CORE_ID_RepProcess	NULL
Field- Group	CORE_ID_RepProcess	CopiedControl"Details" from TE_CORE to TE_FSI
Field- Group	CORE_MA_IDEAMGMT_CommunityComment	NULL

Designer Unit	Name	Description
Field- Group	CORE_MA_IDEAMGMT_CommunityComment	CopiedControl"Details" from TE_CORE to TE_FSI
Field- Group	CORE_MA_IDEAMGMT_CommunityComment	Copied Control "List" from TE_CORE to TE_FSI
Field- Group	CORE_MA_IDEAMGMT_CommunityComment	Deleted Control "De- tails"
Field- Group	CORE_MA_IDEAMGMT_CommunityComment	Deleted Control "List"
Field- Group	CORE_MA_IDEAMGMT_CommunityComment	Updated Control "De- tails"
Field- Group	CORE_MA_IDEAMGMT_CommunityComment	Updated Control "List"
Field- Group	CORE_MA_IDEAMGMT_CommunitySolution	NULL
Field- Group	CORE_MA_IDEAMGMT_CommunitySolution	CopiedControl"Details" from TE_CORE to TE_FSI
Field- Group	CORE_MA_IDEAMGMT_CommunitySolution	Copied Control "List" from TE_CORE to TE_FSI
Field- Group	CORE_MA_IDEAMGMT_CommunitySolution	Updated Control "De- tails"
Field- Group	CORE_MA_IDEAMGMT_CommunitySolution	Updated Control "List"
Field- Group	СР	Updated Control "De- tails"

Designer Unit	Name	Description
Field- Group	ES	Created Control "De- tails"
Field- Group	ES	Created Control "List"
Field- Group	ES	Created Control "MiniDetails"
Field- Group	ES	Created Control "Search"
Field- Group	ES	Updated Control "De- tails"
Field- Group	ES	Updated Control "List"
Field- Group	ES	Updated Control "MiniDetails"
Field- Group	ES	Updated Control "Search"
Field- Group	FI	Updated Control "List"
Field- Group	FI	Updated Control "Search"
Field- Group	НО	NULL
Field- Group	НО	NULL
Field- Group	IA	NULL

Designer Unit	Name	Description
Field- Group	IA	CopiedControl"Details" from TE_CORE to TE_FSI
Field- Group	IA	Copied Control "List" from TE_CORE to TE_FSI
Field- Group	IA	Copied Control "MiniDetails" from TE_CORE to TE_FSI
Field- Group	IA	Copied Control "Search" from TE_CORE to TE_FSI
Field- Group	IA	Updated Control "De- tails"
Field- Group	IA	Updated Control "List"
Field- Group	IA	Updated Control "MiniDetails"
Field- Group	IA	Updated Control "Search"
Field- Group	ID	CopiedControl"Details" from UPDATE_DE- FAULT to TE_FSI
Field- Group	ID	Updated Control "De- tails"
Field- Group	IT	Updated Control "List"
Field- Group	КМ	Updated Control "List"

Designer Unit	Name	Description
Field- Group	KM_FI	Updated Control "De- tails"
Field- Group	KM_PE	Updated Control "De- tails"
Field- Group	КТ	Updated Control "De- tails"
Field- Group	MA	Updated Control "De- tails"
Field- Group	MA	Updated Control "List"
Field- Group	MA.QuickView	NULL
Field- Group	MA.QuickView	Updated Control "De- tails"
Field- Group	MA.Timeline	CopiedControl"Details" from UPDATE_DE- FAULT to TE_FSI
Field- Group	РВ	Updated Control "De- tails"
Field- Group	РВ	Updated Control "List"
Field- Group	PE	Updated Control "De- tails"
Field- Group	PU	Updated Control "List"
Field- Group	recover:A1	NULL

Designer Unit	Name	Description
Field- Group	recover:AD	NULL
Field- Group	recover:AK	NULL
Field- Group	recover:AN	NULL
Field- Group	recover:BE	NULL
Field- Group	recover:CM	NULL
Field- Group	recover:CORE_AK_Templates	NULL
Field- Group	recover:CORE_AN_AK	NULL
Field- Group	recover:CORE_CM_Templates	NULL
Field- Group	recover:CORE_D3_D1Related	NULL
Field- Group	recover:CORE_MA_IDEAMGMT_Community- Comment	NULL
Field- Group	recover:D1	NULL
Field- Group	recover:D3	NULL
Field- Group	recover:IA	NULL

Designer Unit	Name	Description
Field- Group	recover:KM_PE	NULL
Field- Group	recover:MA	NULL
Field- Group	recover:PE	NULL
Field- Group	recover:TD	NULL
Field- Group	recover:TE_KM_CRM_loop_Phase3_ShowMA	NULL
Field- Group	recover:U056	NULL
Field- Group	recover:V1	NULL
Field- Group	RL	Updated Control "List"
Field- Group	TE_CP_ComplaintMgmt	Updated Control "De- tails"
Field- Group	TE_FI_Associations	Updated Control "List"
Field- Group	TE_FI_BusinessClients	Updated Control "De- tails"
Field- Group	TE_FI_BusinessClients	Updated Control "List"
Field- Group	TE_FI_ComplaintMgmt	Updated Control "De- tails"

Designer Unit	Name	Description
Field- Group	TE_KM_ComplaintMgmt_Phase2_CP	Updated Control "De- tails"
Field- Group	TE_KM_ComplaintMgmt_Phase2_FI	Updated Control "De- tails"
Field- Group	TE_KM_ComplaintMgmt_Phase2_PE	Updated Control "De- tails"
Field- Group	TE_KM_ComplaintMgmt_Phase4	Updated Control "De- tails"
Field- Group	TE_KM_ComplaintMgmt_Phase5	Updated Control "De- tails"
Field- Group	TE_KM_CRM_Loop	NULL
Field- Group	TE_KM_CRM_Loop	Updated Control "De- tails"
Field- Group	TE_KM_CRM_Loop	Updated Control "List"
Field- Group	TE_KM_CRM_Loop_AppMenu	NULL
Field- Group	TE_KM_CRM_Loop_AppMenu	Updated Control "List"
Field- Group	TE_KM_CRM_Loop_Phase1	NULL
Field- Group	TE_KM_CRM_Loop_Phase1	Updated Control "De- tails"
Field- Group	TE_KM_CRM_Loop_Phase2	NULL

Designer Unit	Name	Description
Field- Group	TE_KM_CRM_Loop_Phase2	Updated Control "De- tails"
Field- Group	TE_KM_CRM_Loop_Phase3	NULL
Field- Group	TE_KM_CRM_loop_Phase3_ShowMA	NULL
Field- Group	TE_KM_CRM_loop_Phase3_ShowMA	Updated Control "De- tails"
Field- Group	TE_KM_CRM_loop_Phase3_ShowMA	Updated Control "List"
Field- Group	TE_KM_CRM_Loop_Process	NULL
Field- Group	TE_KM_CRM_Loop_Process	Updated Control "List"
Field- Group	TE_KM_CRM_Loop_Process_AppMenu	NULL
Field- Group	TE_KM_CRM_Loop_Process_AppMenu	Updated Control "List"
Field- Group	TE_KM_Social_ChangeCommunityStage	NULL
Field- Group	TE_KM_Social_ChangeCommunityStage	Deleted Control "List"
Field- Group	TE_KM_Social_ChangeCommunityStage	Deleted Control "MiniDetails"
Field- Group	TE_KM_Social_ChangeCommunityStage	Deleted Control "Search"

Designer Unit	Name	Description
Field- Group	TE_KM_Social_ChangeCommunityStage	Updated Control "De- tails"
Field- Group	TE_MA_AppMenu	Updated Control "De- tails"
Field- Group	TE_MA_AppMenu	Updated Control "List"
Field- Group	TE_MA_CRM_loop_Phase3	NULL
Field- Group	TE_PE_ComplaintMgmt	Updated Control "De- tails"
Field- Group	TE_VS_LifeInsurance	Updated Control "De- tails"
Field- Group	U057	NULL
Field- Group	U057	Created Control "De- tails"
Field- Group	U057	Created Control "List"
Field- Group	U057	Created Control "Search"
Field- Group	U057	Updated Control "De- tails"
Field- Group	U057	Updated Control "List"
Field- Group	U057	Updated Control "Search"

Designer Unit	Name	Description
Field- Group	U138	Updated Control "List"
Field- Group	U139	Updated Control "MiniDetails"
Field- Group	U139	Updated Control "Search"
Field- Group	V1	NULL
Field- Group	V1	CopiedControl"Details" from TE_CORE to TE_FSI
Field- Group	V1	Deleted Control "De- tails"
Field- Group	V1	Updated Control "De- tails"
Field- Group	V1	Updated Control "List"
Field- Group	V3	NULL
Field- Group	V3	CopiedControl"Details" from TE_CORE to TE_FSI
Field- Group	V3	Copied Control "List" from TE_CORE to TE_FSI
Field- Group	V3	Updated Control "De- tails"

Designer Unit	Name	Description
Field- Group	V3	Updated Control "List"
Field- Group	V4	NULL
Field- Group	V4	CopiedControl"Details" from TE_CORE to TE_FSI
Field- Group	V4	Updated Control "De- tails"
Field- Group	V5	NULL
Field- Group	V5	CopiedControl"Details" from TE_CORE to TE_FSI
Field- Group	V5	Updated Control "De- tails"
Field- Group	VV	Updated Control "List"