SARATOGA CRM®

Contents

Introduction

The following Release Notes describe new features, important release information, and issues resolved in Saratoga CRM 7.1.

What's New in Saratoga CRM 7.1

The following enhancements are provided in Saratoga CRM 7.1:

1. **Improved display of Aggregate Report Results in Rich Client** - With Saratoga CRM 7.1, a new report action named 'Aggregate Report' has been introduced to improve the display of SubCounts/SubTotals. This feature is available only on Rich Client.

2. **Behavior of Rules in Mobile Client** - With Saratoga CRM 7.1, Alert, Allow, Update and Reject rules trigger on data change.

3. **Screen Wizard Enhancements** - The following enhancements are made to Screen Wizard in Saratoga CRM 7.1:

   ○ The dialog boxes in Screen Wizard can now be re-sized.
   ○ The Page Length in Screen Wizard can be adjusted by dragging the screen.

4. **Thin Client UI Changes** - With Saratoga CRM 7.1, Thin Client has a new UI for Reports. The menu for Refresh Report, Report Options, Send To and Edit are now available on the top of the screen. For example see *Figure 1 below*.

Figure 1 Report Results

5. **Send to... changes in Thin Client** - With Saratoga CRM 7.1, while sending large data from query results, you will see a progress icon. This will help users to know that the export of data is in progress.

6. **Query Timeout** - With Saratoga CRM 7.1, the query timeout is fixed at 5 minutes. If the query exceeds five minutes, a message is displayed prompting the user to refine the criteria and rerun the query.

7. **Global Search in Thin Client** - With Saratoga CRM 7.1, you will see a progress icon while the Global Search is running.

8. **Time Format in Mobile Client** - With Saratoga CRM 7.1, the Date/Time in Mobile Client will always display in 24 hr format.

9. **Support for SQL Express 2016**- Remote User Database now supports SQL Express 2016.

10. **Support for SQL Server 2016 Enterprise Edition**- Saratoga CRM 7.1 now supports SQL Server 2016 Enterprise Edition.

11. **Support for Windows Server 2016** - Windows Server 2016 is supported with Saratoga CRM 7.1.

12. **Support for Xenapp 7.12** - Saratoga CRM 7.1 is certified to be compatible with Xenapp 7.12.

13. **iOS 10 Compatibility for Mobile Client** - Saratoga CRM 7.1 Mobile Client is compatible with iOS 10.

14. **LAN and RDB Upgrade** - Saratoga CRM 7.1 has an improved installation for LAN and RDB upgrade.

15. **Oracle 12c Supported with EMF** - Saratoga CRM 7.1 supports Oracle12c database with Event Management Framework 7.1 Integration.

Important Notices

- Form Center does not currently support the creation or modification of forms containing references to both parent and child tables when the selected dataview only contains List Hovers and not List Grids.

- **Saving a Rich Client Query Tool Report in Saratoga CRM 7.1**: As a result of the enhancement permitting Form Wizard forms to be linked to specific Query Tool reports in 6.10, any Query Tool report saved with version 7.1 will not be available to users on 6.9.0 or earlier versions. If a 7.1 user opens and saves a query created in 6.9.0 or an earlier version, the following prompt will display: `This report was created with an earlier version of Saratoga CRM. If you resave this report, you will not be able to reload the report using the earlier Saratoga CRM version. Continue saving?`
  User can click the Yes button to save the report with changes.

  Note: Any report saved with version 7.1 cannot be opened by any user still running 6.9.0 or an earlier version. Users running earlier versions will receive error `10064E – Report file has invalid version`.

- The default installation path for all the Saratoga applications is C:\Saratoga.

  Note: The upgrade of Saratoga CRM to 7.1 release has been tested and certified from Saratoga CRM 6.10 or later.

- **It is recommended that the DVF, SCHEMA.DBD, and RPT files are backed up before upgrading to Saratoga CRM 7.1**.

- **Thin Client sort order is not retained when report result has RTF column**

  Thin Client will not retain the sorting of results by column if the RTF column is sorted and user clicks on edit mode and comes back.

- **Change of behavior for Rich Client Reports assigned to a Web Group**: Rich Client has **Run at Open** checkbox in the Report Options tab. From 6.10, Thin Client evaluates the Rich Client option to determine the appropriate behavior while running a Rich Client report assigned to a Web Group. The following behaviors will occur:

  - **Rich Client report with Prompt for Criteria checked to one or more fields and Run at Open unchecked**:

    Thin Client will display the **Edit Report Options** dialog box showing all columns assigned to the report. Clicking the **Run Report** button will display another dialog box showing the **Prompt for Criteria** fields. User can enter criteria on either dialog boxes before clicking the **Show Results** button to run the query.

- **Rich Client report with Prompt for Criteria checked to one or more fields and Run at Open checked**:

  Thin Client will display the Report dialog box showing only the **Prompt for Criteria** fields. User can enter criteria before clicking the **Show Results** button to run the query.

- **Rich Client report with no Prompt for Criteria and Run at Open unchecked**:

  Thin Client will display the **Edit Report Options** dialog box displaying all columns assigned to the report. In previous Thin Client versions, the report runs without presenting the report dialog box to the Thin Client user.

- **Rich Client report with no Prompt for Criteria and Run at Open checked**.

  The report will run at launch in Thin Client.

Issues Addressed in Saratoga CRM 7.1

Screen Wizard

ID	Description
BA1Z1ZTEL	Resolved an issue where the lists on Site level were causing the Screen Wizard to crash.

UAdmin

ID	Description
BA05ES0AX	Resolved a misspelling on a UAdmin menu. The menu said Display User Detail instead of Detail.

Saratoga CRM

ID	Description
BAAXIOHO6	Resolved an issue where the upgrade of Rich Client remote from 6.8.2.111 to 7.0.0.331 HF1 using MSI exe was wiping out the existing working directory files and was replacing the directory as a newly installed working directory.
BA3Z2LC1G	Resolved an issue in Rich Client where any field containing angular brackets was not displayed in the report.
BA0C2L3KX	Resolved an issue in Rich Client where a dataview contained list hovers. After the user used the list hover control to open a detail page, if they returned back to the list grid of the hover control and selected another record, they were unnecessarily prompted that a detail page was open.

ID	Description
BA064XG2M	Resolved an issue in Rich Client where filtering of list grid was not working if the list grid was placed in the static or detail area of a page,
B9PZPFZGK	Resolved an issue where Rich Client and Thin Client focused differently when conditional details tabs were involved.
BA4S4U15S	Resolved an issue in Thin Client where searching for empty RTF fields displayed incorrect results.
BA52MBUHH	Resolved an issue in Thin Client where the join search returned results without any rows after joining a record using Google Chrome.
BACQ7ECCG	Resolved an issue in Rich Client list grids. When a list grid contained Join and View columns, unnecessary selects were being sent to the database when a user re-sized the dataview or scrolled through the list grid.
BAD3DEQDX	Resolved a performance issue in Rich Client where opening a record from an Oracle database was very slow after upgrading from 6.8.3 to 7.0.0.HF1.
B8GM5ERO6	Resolved an issue in Rich Client where the Query Tool screens were getting cut off on Windows 7 machines with personalized text set to 125% or 150%.
BA3U2W7D6	Resolved an issue in Thin Client where an email generated by an outgoing email template was not formatted correctly if the body of the email contained the special characters '<' and '>'.
B9W751CPS	Resolved an issue in Thin Client where the Date Fields with Allow rules remained grey even after Allow rule requirements were met.
B9YIC9DR8	Resolved an issue in Thin Client where the Send to Excel function was converting the contents of date fields to Text format.
BAAR3HTOZ	Resolved an issue in Thin Client where the report results count was incorrect.
BAAR3S3SC	Resolved an issue in Thin Client where Query Tool was counting the line that contained the count of total rows returned in its Totals count.
BAAR4F5UM	Resolved an issue in Thin Client where the reports with highlighted rows had incorrect sort order after sorting.
BAAU4KF9J	Resolved an issue in Thin Client where the users were randomly losing connection with an error message.
B9QVAUWP3	Resolved an issue in Thin Client where upgrade of webserver to .net 4.6 caused a login error.
BAAUCMZ1Z	Resolved an issue in Thin Client where the euro symbol disappeared in RTF columns after save and refresh.
BAD3C7WDR	Resolved an issue in Thin Client where the Help was not opening and a message

ID	Description
	was displayed prompting users to download Adobe Reader 7.0.
BAAECQYST	Resolved an issue in Mobile Client where spaces in Cross-Validation lists were causing an error.
BABB4FM4B	Resolved an issue in Mobile Client where the Table List was empty and the current stored value was erased.
BA0C6QBHK	Resolved an issue in Mobile Client where different dialog prompts were displayed when the user clicked on Phone, Email or Url.
BA0R6NZ8N	Resolved an issue in Mobile Client where the user had to Save and Refresh for Allow change rule to change the column's status.
BA248FWLH	Resolved an issue in Mobile Client where the item span and column layout setting were ignored in the Dashboard.
BA2UB0772	Resolved an issue in Mobile Client where the Dashboard did not display any charts.
BA424H50A	Resolved an issue in Mobile Client where the user was not allowed to save data changes if the user had selected multiple values from a multi-fill cross validated table list.
BA40CLMQK	Resolved an issue in Mobile Client where the navigation using application back key was not working properly.
BA41BHP2B	Resolved an issue in Mobile Client where the report options of Convert to Month, Convert to Year and Convert to Quarter did not work as expected.
BA0F4VMZM	Resolved an issue in Mobile Client where the user could key in different values on the same field if it displayed multiple times to DVF and there was no consistency on which value was saved.
BA4LAC4F5	Resolved an issue where Mobile Client always displayed time using AM/PM format. The time format will now always be the 24 hr format.
BA1D50JC3	Resolved an issue in Mobile Client where the Schema Column Option named icon was not working.
B92L4X01X	Resolved an issue in Mobile Client where the user was not able to select a date range using Relative Date criteria.

Known Issues in Saratoga CRM 7.1 and later

To view the known issues, log on to the Saratoga Customer Portal. If you do not have logon credentials, send an e-mail to Global Technical Support requesting access to the Saratoga Customer Portal.