

# CORETRAC

Release Notes

Version: 3.80.1

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# Introduction

The following Release Notes describe new features, issues resolved, and deployment procedures for the 3.80.1 .

## What's New in CoreTrac 3.80.1

The 3.80.1 Service Pack 1 release includes the following new features:

1. **Export data to word from contact**

You can now use the **Print Form** feature available under the **File** menu of the **Contact** page. This allows you to configure a word merge option in the Contact page; a word document opens based on the Word template configured by support with the values relevant to the contact merged.

2. **Create Notes that are Private by Role**

You can now restrict the visibility of Case Notes and make it private based on a particular role selected in the case subcategory while creating the notes.

3. **Copy the Account Number in Service Center**

You can now copy the **Account** number of the related account for a service case in the Service Center.

4. **Queue by Branch**

The itinerant users can now view the queued tasks assigned to the branch for which they are logged into.

5. **Sync service access is limited**

The sync service access is now set limited only for the active users and not for the inactive or non users.

6. **Sync subscription attempts**

Now, the maximum of five attempts are implemented to reevaluate the current process when starting sync subscriptions or sync service.

7. **Create Log table**

You can now access the **Log** table created newly to track the list sync records that were attempted and ignored when starting sync subscriptions or sync service.

## 8. Update events when email address changes

Now, all your outlook activities or events are synced to the new email address, if your ownership or email address is changed.

# Issues Fixed in CoreTrac 3.80.1

- **Inactive Employee Receives Email Notifications**

Fixed an issue where the inactive users (having access to queue) were receiving email notifications for the activities pushed to the queue.

- **Queued Opportunity Page Missing Branch**

Fixed an issue where the Queue Branch name was missing from the Queued Opportunities window.

- **Unable to Export the Onboarding Data**

Fixed an issue where an error was occurring while exporting the Onboarding data to word or excel.

- **Unable to Export the Relationships Data**

Fixed an issue where an error was occurring while exporting the relationship data to word or excel.

- **Performance**

Fixed performance issues caused while interacting with Event list pages.

- **Unable to Search in the User's List with Apostrophes**

Fixed an issue where the search function was not accepting entries that included apostrophes either in the name or last name of the user.

- **Performance Page Doesn't Account for Min Threshold**

Fixed an issue where, on the Compensation widget, on the Performance page, the "Incentive" value was showing incorrect as it was ignoring the threshold that must be reached. Also, the user should not be eligible for the Incentives if compensation plan has not met threshold value.

- **IE Browser Window Appears to Reset on each List Page**

Fixed an issue where the right pane of the browser window was taking 2 to 3 seconds to display completely.

- **Incorrect Error Message in Event Cases**

Fixed an issue where the Event Cases error message was displaying incorrect when the user tried to delete an event type that is tied to existing events.

## Deployment Procedure

### Deploying CoreTrac 3.80.1

1. Backup the entire **ResourceOne** directory.
2. Backup the Databases CTAdmin, R1\_DB, and EX\_R1\_DB(AFI\_375, CTAdmin, CTExternal\_Source, EX\_AFI\_375, ReportWriter).
3. Replace the legacy folders (dcom, muu, www) from the new build with UDL changes.
4. Replace the ResourceOne files from new build by keeping same `header.htm`, Config files, (envsettings and log4net), Datamaps (xml files), templates folder and subfolders (xml files).
5. Open the envsettings config file and add the following settings (If settings are not present):
  - `<add key="RestrictCaseNotesByCategory" value="true"/>`
  - `<add key="UseItinerantBranchInQueues" value="true"/>`
6. Go to `Templates\Pages\Case` under the ResourceOne directory.
7. Open the **Default** XML file and add the following `showSelectableAccountEKey` attribute to `contactselector` item:

```
<contactselector
path="~/ServiceCenter/Controls/CaseContactAccountSelector.ascx"
source="entity" field="contact_id" required="true" label="Contact:"
id="contactselector"
showSelectableAccountEKey="true"></contactselector>
```

8. Go to `Templates\Pages\User` under the ResourceOne directory.

- Open the "Default" XML file and add below settings beneath the Windows\_Acct\_Name row (Applicable for itinerant users)

```
<row>
<column width="50%">
<datacontrol source="entity" type="rlcheckboxbitcontrol"
label="Itinerant"
truevalue="1" falsevalue="0" field="Itinerant"
showonnew="false" showonedit="true"></datacontrol>
</column>
</row>
```

- Go to `Templates\Pages\Contact` under the ResourceOne directory
- Open the "Default" XML file and add the below settings

```
<conditionalforms>
<form governingcontrolid="none" name="ContactWordMerge"
path="C:\Dev\CoreTrac\Dev\Source\Code\ResourceOne\ResourceOne2\Resources\Forms\HPWordMerge.docx" governingcontrolvalues="" />
</conditionalforms>
```

- Open the build folder
- Go to `Upgrades\Scripts.zip\3.80.1`
  - Execute all the scripts present in the Bank DB folder.
  - Execute all the scripts present in the CTAdmin folder

## Deployment Rollback

- Replace the Legacy (dcom, muu, www) files from backup folder with UDL changes
- Replace the ResourceOne files from backup folder by keeping same header.htm, Config files, (envsettings and log4net), Datamaps (xml files), templates folder and subfolders(xml files).
- Open the envsettings config file and remove the settings
  - `<add key="RestrictCaseNotesByCategory" value="true"/>`
  - `<add key="UseItinerantBranchInQueues" value="true"/>`
- Go to `Templates\Pages\Case` under the ResourceOne directory

4. Open the "Default" XML file and remove showSelectableAccountEKey attribute from contactselector item as below

```
<contactselector source="entity" field="contact_id"
id="contactselector" label="Contact:" required="true"
path="~/ServiceCenter/Controls/CaseContactAccountSelector.ascx"/>
```

5. Go to Templates\Pages\user under the ResourceOne directory
6. Open the "Default" XML file and remove below settings beneath the Windows\_Acct\_Name row (Applicable for itinerant users)

```
<row>
<column width="50%">
<datacontrol source="entity" type="rlcheckboxbitcontrol"
label="Itinerant" truevalue="1" falsevalue="0" field="Itinerant"
showonnew="false" showonedit="true"></datacontrol>
</column>
</row>
```

7. Go to Templates\Pages>Contact under the ResourceOne directory
8. Open the "Default" XML file and remove the below settings.

```
<conditionalforms>
<form governingcontrolid="none" name="ContactWordMerge"
path="C:\Dev\CoreTrac\Dev\Source\Code\ResourceOne\ResourceOne2\Resources\Forms\HPWordMerge.docx" governingcontrolvalues="" />
</conditionalforms>
```

9. Restore the database using the old Databases back up files.(CTAdmin, R1\_DB, and EX\_R1\_DB (AFI\_375, CTAdmin, CTExternal\_Source, EX\_AFI\_375, ReportWriter)