

Elsinore IssueNet Platform 5.0

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Introduction:

Thank you for choosing IssueNet. This document is designed to help you quickly install and configure IssueNet and keep you up to date on the latest updates, new features, and fixes. This guide

does not cover the administration and use of IssueNet. For information on using IssueNet, please consult IssueNet's Help system and tutorials and tech tips located at www.elsitech.com. If you have questions or encounter problems that are beyond the scope of these resources, please contact Elsinore Technologies technical support services.

[Installation and Configuration Basics](#) provides information on installing IssueNet for evaluation and for multiple users in a distributed environment.

[System Requirements](#) provides detailed information on system requirements and security setting required for IssueNet products to function properly.

[Release Notes](#) provides information about known issues and resolved issues in this version. The release notes are detailed, but not comprehensive. If you believe you are experiencing a problem not mentioned in the [Known Issues](#) section or would like to receive more information about a known incident, please feel free to contact [Elsinore Technologies Technical Support Services](#).

[Technical Support](#) provides information on Elsinore technical support resources.

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What's New In IssueNet 5.0

The IssueNet 5.0 release introduces a variety of new features and minor enhancements. For information on defects fixed and other changes implemented in this release, please consult the [Release Notes](#) section of this document.

Feature	Supported Products	Enables You to
Re-designed toolbars with Outlook style menus and buttons	IssueNet Manager, IssueNet Workspace	The new toolbar format simplifies the process of performing simple tasks with a user interface that users will find more similar to their other Microsoft office tools
Quick Edit window	IssueNet Manager	Like the Outlook Reading Pane, the Quick Edit window allows users to quickly navigate and edit lists of issues and tasks with fewer clicks and open windows.

Simplified and enhanced e-mail notification delivery options	IssueNet Platform	The IssueNet platform offers new e-mail delivery options such as direct to SMTP and IIS mail drop directory while also eliminating the requirement to use MSMQ queuing services
Project selection is option when executing workflows	IssueNet Platform	Optional projects simplify workflow planning and execution for operational issue and tasks that do not have a determined project context
IssueNet Workspace support for Visual Studio 2008	IssueNet Workspace	Easily work with issues and task from within Visual Studio 2008
Add New buttons on all related object views	IssueNet Manager, IssueNet Workspace	On any related item view, for example, contacts linked to issues, users can click the Add New button to create a new item and link it to the current in a single action. The Add New button greatly simplifies the process of adding contacts and creating new issue links.
Field selections of text search panel of search form are all selected by default.	IssueNet Manager, IssueNet Workspace	Simplifies keyword searches by making the default search option a full text search.
Simplified layout of workflow action forms	IssueNet Administrator, IssueNet Workspace	Workflow actions can be edited and created more quickly with fewer clicks.
E-mail notification templates are now stored in the database as an attribute of a notification action	IssueNet Platform	More easily edit and manage e-mail notification templates
E-mail notification templates now use the same variable syntax as the IssueNet Platform	IssueNet Platform	Include a wider range of information in your notification templates. For example, a task notification can use variables such as \$(WorkflowIssue) to include information about its linked issue.
Right-click menus in the Explorer Views	IssueNet Manager, IssueNet Workspace	More easily edit and submit issues into folders
Optimized the loading of forms with list boxes with large numbers of entries	IssueNet Manager, IssueNet Workspace	Load forms with large item lists more quickly
Added support for adding custom controls to the forms designer toolbox	IssueNet Architect	Developers can add new form controls to the IssueNet forms designer
Added support for custom events and methods on form which can be exposed in script	IssueNet Architect	Developers can access custom events and methods in form scripts
Added relationships between classes to support queries based on properties of an objects parent	IssueNet Platform	Run queries for items such as issues based on properties of its parent object

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Release Notes:

Please Note: The following release notes document known issues unresolved at time of release as well as defects and other software changes of potential interest to users and administrators. These release notes are not comprehensive of every change made to the software for this release. Software changes deemed to be of internal interest only and defects believed to be present only in internal releases have not been included.

Because any issue may have been reported by multiple customers and be referenced by multiple support tickets, issue IDs used in these release notes are the unique ID's used by Elsinore development. If you have a question about a specific issue or whether it resolves a specific support ticket, please contact Elsinore Technical support or refer to issue IDs referenced in your support ticket(s).

Issues Resolved by this Release

IssueID	Description	Products Affected
4114	Form script would not save references if there was no script content	IssueNet Architect
4116	Setting an icon in the properties of a form could cause an exception	IssueNet Architect
4121	Template reference was missing from the stock notification rule Send New Primary Contact Notification to Primary Contact.	IssueNet Administrator
4129	Installing the IssueNet Manual Example Sample data contained invalid data which would produce an error on logon	IssueNet Platform
4130	The dialog for selecting multiple object values in the Query Builder needed to be re-sizeable	IssueNet Manager
4131	Mail Item class display names was misspelled	IssueNet Architect
4162	Right clicking on an item in the working set view would produce an exception.	IssueNet Manager
4168	Print formats included the message "Unlicensed ActiveReports Designer. Requires ProEdition" in the report header	IssueNet Administrator
4169	Cloning a report and changing the class the report is bound to would not update the available class properties for the report.	IssueNet Administrator
4186	Mass update functionality was not available in the Bookmark view	IssueNet Manager
4187	LDAP integration would not create new user accounts via web service connections.	IssueNet Platform

Known Issues at Time of Release

IssueID	Description	Products Affected
DEF-1140	Landscape printing mode is not available.	IssueNet Manager, IssueNet Workspace
DEF-1812	Duplex printing for text report formats is not available.	IssueNet Manager, IssueNet Workspace
DEF-2138	Zoom controls do not function properly for distribution charts.	IssueNet Manager, IssueNet Workspace
DEF-2465	Vertices added to workflow transitions cannot be repositioned on the workflow diagram.	IssueNet Administrator
DEF-2780	Toolbar customization does not persist between sessions.	IssueNet Manager
DEF-2992	Opening workflow and report designers can cause the Administrator to lose focus.	IssueNet Administrator
DEF-3174	In rare instances closing a Workspace form will cause the host application to lose focus.	IssueNet Workspace
DEF-3409	It is possible to get an exception message when clicking around in the Explorer. However, the occurrence is very infrequent and the exact steps to reproduce are unknown.	IssueNet Manager, IssueNet Workspace
DEF-3558	In some instances the scroll bar on dashboard pages is not present.	IssueNet Insight
DEF-3666	Form and solution scripts will not run on Vista and some Windows XP systems unless a hot fix is applied. See MSDN article 928208 or contact Elsinore technical support for more information.	IssueNet Manager, IssueNet Workspace
DEF-3743	When regional settings which use metric measurements are in use, Page Setup does not maintain margins properly.	IssueNet Manager, IssueNet Workspace
DEF-3847	Cannot open document URI links via Click Once deployment.	IssueNet Manager, IssueNet Workspace
DEF-3923	New queries do not show up in the query filter box of the Issue Explorer unless the Explorer is closed and re-opened.	IssueNet Manager
DEF-3939	When importing from a Visual Intercept 3.x product an exception can occur if the 3.x tables have different ownership values.	IssueNet Platform
DEF-3954	An exception message can occur when opening the queries after exiting the IssueNet Manager with the Search group bar open and the Queries group bar closed.	IssueNet Manager
DEF-4045	In circumstances that are difficult to reproduce, attaching a mail item with many recipients to an issue can produce an exception.	
DEF-4097	An exception can occur when changing an item from one type to another when the class the item is being changed to has relationships not supported in the class one is changing from. Clicking Continue will allow the change type to proceed.	IssueNet Manager

DEF-4067	When using Outlook 2003 The IssueNet Workspace toolbar buttons may not be active on open mail item forms.	IssueNet Workspace
DEF-4064	When importing from Visual Intercept 3.x products to IssueNet based products the Incident Track field is not included in the import. Please consult Elsinore technical support for workarounds.	IssueNet Platform

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Upgrading from Previous Versions:

General upgrade procedure

To upgrade your IssueNet software from a previous version, simply run the installer. There is no need to uninstall. Uninstalling it is not recommended unless there is a specific reason to do so. Once the new software is installed, there are two post installation tasks you will need to perform.

1. Logon to the IssueNet Administrator via a direct connection and let the Administrator determine if the IssueNet database requires and update. If an update is required, the Administrator will provide you with the option to update. As you would with any change to your production data, please back-up your IssueNet database before performing the database update.
2. Run the IssueNet Assistant using the **Configure and Existing IssueNet Installation** option. Running the Assistant will update your IssueNet Central deployment site. Until you run the Assistant, clients launching products using IssueNet Central will not have access to the updated software or updated IssueNet Central options.

Upgrading from a version prior to 5.0

Notification template conversion

One of the new features introduced in version 5.0 is the incorporation of notification templates in the database as an attribute of send notification actions. Consequently, the upgrade process is designed to convert the file based notification templates to the new format. When you run the database upgrade from the IssueNet Administrator, the upgrade process will look for the notification template referenced by each notification action in the notification templates directory on the server and import the template into the database. If the notification template directory does not exist, templates are missing, or the configuration setting which defines the location of the templates is incorrect, the database upgrade process will abort with an error message indicating that the templates cannot be located. If

you encounter this issue you have two basic option:

1. Locate the notification template directory and templates and ensure that they are in the location defined in the config.xml located in the Elsinore Technologies directory of the Application Data directory on the IssueNet server.
2. Identify notification actions which reference templates which do not exist and edit the actions to reference valid templates.

Toolbar Conversion

The 5.0 IssueNet Platform replaces the configurable new object toolbar and menu with an Outlook style New button and menu located on a re-designed main toolbar. The New menu items are generated dynamically based on a Creatable flag which is set on a per class basis. Together the New menu and Creatable flag replace the toolbar designer featured in version of IssueNet prior to 5.0. When you convert your IssueNet database to the 5.0 version the process will remove your toolbar definitions, which are no longer supported, and set the Creatable property to true for each class included in your toolbar definitions. If you wish to make changes or adjustments to the items in the new menu after conversion to the 5.0 schema, open the IssueNet Architect, open the class(s) you wish to add or remove from the New menu , and toggle the Creatable flag using the checkbox on the general tab.

Saved Solutions

Solutions saved from a version prior to version 5.0 cannot be installed directly into an IssueNet database created using the 5.0 version or greater. To migrate a solution saved from a version prior to 5.0, you will need to install the solution into a database created using an IssueNet version prior to 5.0 and convert the database to the 5.0 schema using the IssueNet Administrator.

Upgrading from a version prior to 4.8

Versions of the IssueNet Platform prior to version 4.8 supported solution scripts. In version 4.8, the architecture was changed to allow scripts to be added directly to actions. If you have created solution scripts, i.e., scripts added to a solution in the IssueNet Architect, you will need to migrate your script functions to Run Script actions **before you upgrade the database**. Failure to migrate solution scripts prior to a database upgrade will result in the loss of the scripts. If you need more information on migrating existing solution scripts, please contact Elsinore Technical Support.

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Installation and Configuration Basics:

Basic Installation Requirements

The IssueNet platform can be installed on any computer running Windows 2000 or any more recent version of the Windows operating system. The IssueNet Server, or another computer in your environment, must be running IIS (Internet Information Server) 5.0 or greater in order to host the IssueNet license server. See the Licensing section below for more information on the license server and license activation. IIS is also required for IssueNet web services which provide remote access.

IssueNet supports SQL Server and SQL Server Express to host the IssueNet database. SQL Server Express is a convenient no-cost option suitable for evaluation or production use by smaller teams. Any SQL Server Express database can be easily upgraded to a full SQL Server database for enterprise database support.

For the IssueNet server to send e-mail notifications, a computer running MSMQ (Microsoft Messaging and Queuing Services) must be available on the server or another computer. Both IIS and MSMQ can be added to a Windows based computer using the Add/Remove Windows components utility in the Windows Control Panel.

Creating an Environment for Product Evaluation

If you are evaluating IssueNet it is recommended that you launch the IssueNet Assistant after installation. The Assistant is a wizard which will step you through several post installation tasks that will allow you to evaluate IssueNet according to your specific requirements. The Assistant will:

- Allow you select a Solution and install it into a new IssueNet database
- Install sample data for the Solution you have selected
- Configure your solution for ClickOnce deployment via IssueNet Central
- Activate new IssueNet solution licenses

An IssueNet Solution configures IssueNet with workflows, fields, forms, reports and other features for a particular business process. When a solution is installed it builds the database, forms, reports, workflow rules and other business rules to suit a particular issue management application such as software life-cycle management or generic issue management. The sample data populates the solution with solution specific data that will allow you to evaluate the solution's features such as workflows, forms, and reports in a realistic environment. You can run the Assistant multiple times to create as many different IssueNet databases and solutions as you like. As you become more familiar with IssueNet you can start using its tools to modify solutions and create your own issue management solutions.

Licensing

In order to access an IssueNet Solution a validated license is required. Licenses are added to an IssueNet instance and activated using the IssueNet Administrator or the IssueNet Assistant. When a user logs on these licenses are validated by the IssueNet License Server. An IssueNet license server is a web service which is installed as a component of an IssueNet platform installation. Because it is a web service, the IssueNet License Server must be installed on a computer running IIS 5.0 or greater. Your IssueNet installation media or download package should include license keys and detailed instructions on license allocation and activation. If you do not have this information please contact your Elsinore representative.

Supporting Multiple Users in a Distributed Environment

For using IssueNet with multiple users in a distributed environment, certain features designed to simplify remote access and distribution:

Web Services

When the IssueNet platform is installed on a computer running IIS, it will create an IssueNet web service. The web service allows users to connect to IssueNet using an internet connection. IssueNet supports both direct database and web service connections. However, for ease of access and administration Elsinore highly recommends the use of web service connections. Users can create their own connections from client applications. However, in a typical environment user will launch client applications with pre-configured connections using the IssueNet Central web site.

IssueNet Central Deployment

IssueNet Central is a web site created by the IssueNet platform installation which allows users to access IssueNet via a URL. Using this web site for distribution of IssueNet provides the following advantages.

- Users can access IssueNet from any internet connection and are never required to run an installation package.
- The software and subsequent software upgrades can be installed and distributed from a single computer via the IssueNet Central web site.
- Client connection information is pre-configured.

System Requirements:

General Requirements

IssueNet server and client components require the .NET 2.0 framework or greater. If the framework is not present, the IssueNet installer will attempt to download and install it. The framework can also be obtained from other sources such as the [Windows Update](#) web site.

IssueNet Database Requirements

IssueNet support SQL Server and SQL Server Express databases of version 2000 or greater. The IssueNet database may be hosted on the same or on a server separate from the IssueNet server installation. When planning your installation, keep in mind that SQL Server Express databases can be easily upgraded to full SQL Server databases. However, SQL Server Express databases have a maximum size of 4 GB. Database size limitations may be a consideration if you intend to store large numbers of attached documents in the database.

IssueNet Server Requirements

The minimum requirement for an IssueNet server installation is any Windows operating system which can support the 2.0 .NET framework or greater. In order to host IssueNet web services, IssueNet Relay, IssueNet Insight, or IssueNet Central, the server must also support IIS 5.0 or greater. In order to serve e-mail notifications server must have MSMQ (Microsoft Messaging and Queuing Services) installed. MSMQ can be added to a computer from Add/Remove Windows Components section of the Add/Remove Windows Components utility in the Control Panel.

The minimum recommended hardware configuration for an IssueNet server is: a processor speed of 1 GHz or greater, 1 GB of RAM, and approximately 500 MB of free disk space. These recommended minimum requirements are based on the resources required to support approximately 20 users, a database with several thousand issues, and an average number of attachments of relatively small size. Disk space requirements may vary greatly based on the size and number of attached documents.

IssueNet Manager and Workspace Requirements

The IssueNet Manager and Workspace clients require any Windows operating system which will support the .NET framework version 2.0 or greater. The minimum recommended hardware configuration

for an IssueNet client is: a processor speed of 800 MHz or greater, 256 MB of RAM, and approximately 60 MB of free disk space.

If you intend to have IssueNet clients use direct instead of web service connections, each client must have MSMQ (Microsoft Messaging and Queuing Services) installed in order to generate e-mail notifications. MSMQ can be added to a computer from Add/Remove Windows Components section of the Add/Remove Windows Components utility in the Control Panel.

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Technical Support:

When you have a question about Elsinore Technologies' IssueNet, look first in the online Help files or the IssueNet Administrator's Guide. If the documentation does not address your question, no-cost support from Elsinore Technologies' support engineers is available via a toll call between 9:00 A.M. and 5:00 P.M. Eastern Standard Time, Monday through Friday, excluding holidays. Support is available to all registered owners of IssueNet products for thirty days from the original date of purchase. Additional support contracts are also available. When you call, you should be at your computer and be prepared to provide the following information:

- The version number and product ID of the IssueNet product you are using.
- The type of hardware that you are using, including any network hardware, if applicable.
- The operating system that you are using.
- The exact wording of any messages that appeared on your screen.
- A description of what happened and what you were doing at the time of the incident.
- A description of how you tried to solve the problem.

To Contact Elsinore Support Engineers:

Telephone: 1.866.866.0034 Option 2

Fax: 919.532.0023

E-mail: support@elsitech.com

Web Site: www.elsitech.com/