

# Elsinore IssueNet Platform Version 5.5

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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](http://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 5.5**

The IssueNet 5.4 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.

<b>Feature</b>	<b>Supported Products</b>	<b>Enables You to</b>
<b>Save Workspace to Server</b>	IssueNet Platform	Allows saved workspace to be available from all locations.
<b>Adding local property to a class places cursor in Name column</b>	IssueNet Architect	When adding a local property, the cursor is in a more intuitive location.
<b>Disable Cloning for specified classes.</b>	IssueNet Architect	Added a Cloneable tag to the general tab of the Class; if de-selected class objects cannot be cloned.
<b>Allow the selection of Cloneable fields.</b>	IssueNet Architect	Added a checkbox on the Class form which will determine whether a specified property will be cloned.
<b>Added Variables for Calendar Quarters.</b>	IssueNet Architect, IssueNet Administrator	Variables for Calendar Quarters.
<b>Drag and Drop actions highlight the target when dragging.</b>	IssueNet Manager	Provides a visual indication of the target location when an object is dragged..
<b>Workspace creates a connection when downloaded/run from IssueNet Central</b>	IssueNet Integration Manager	Removes the necessity to create a connection when using Integration Manager.

**Enable IssueNet Windows login to handle fully qualified domain names**

IssueNet Administrator, Manager

This is implemented in the IssueNet Administrator, Tools\System Options\LDAP-->Include domain in form user@domain. This does require that MMFWebServices be configured to allow for Windows Authentication.

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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**

Issue ID	Description	Products Affected
DEF-4949	Exception occurs if Class Name is added to a List View of a class derived from Issue.	IssueNet Manager
DEF-5002	Adding objects to solution using the AddObjects button does not export them properly.	IssueNet Architect
DEF-5003	Query results differ between Insight and Manager due to deleted but not purged items.	IssueNet Platform
DEF-5005	Quick Edit window is restored each time you connect to the application, even if it is turned off and have saved workspace.	IssueNet Manager
DEF-5031	Variables of local Properties containing underscores in the name are not being parsed	IssueNet Platform
DEF-5034	Exception is thrown when [None] filter is selected after switching from another filter on different class and sort.	IssueNet Manager
DEF-5035	Type ahead in combo box does not recognize / character.	IssueNet

		Manager
DEF-5039	Unable to create a relationship where the Related Class is the current class.	IssueNet Architect
DEF-5040	Folder drop down on new Issue in Manager does not show all options in the drop down window under some conditions.	IssueNet Manager

### Known Issues at Time of Release

Issue ID	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-3174	In rare instances closing a Workspace form will cause the host application to lose focus.	IssueNet Workspace
DEF-3558	In some instances the scroll bar on dashboard pages is not present.	IssueNet Insight
DEF-3743	When regional settings which use metric measurements are in use, <b>Page Setup</b> 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-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 <b>Continue</b> 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-4862	Relay menus do not work in Safari	IssueNet Relay
DEF-4855	"New Issue from Mail" changes quotation marks to question marks.	IssueNet Workspace

<b>DEF-4971</b>	Relay Menu bars do not work in Google Chrome	IssueNet Relay
<b>DEF-5036</b>	Selection of "Search" or "Queries" tab is not remembered when workspace is saved	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. Prior to running the installer, you should backup your IssueNet database and any customized pages. There is no need to uninstall unless you are upgrading from a version prior to 5.3. Uninstalling 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. Run the IssueNet Assistant to upgrade the Database Schema. 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.
3. In some instances you may encounter the following message during the installation 'Error Failed to read IISWebSite table' which will cause the installer to end prematurely. If you encounter this error please take the following steps:
  - Open IIS and right click on the Default Web Site, select Properties.
  - On the Web Site tab, if you have defined a specific IP Address, please set the IP Address to (All Unassigned), and the TCP Port to 80.
  - Click the Advanced button and remove any Host Header Name values.
  - After the changes have been made, run the installer again and when it completes, set the above values back to their previous setting.

### **Upgrading from a version prior to 5.3**

Because of changes made to the installer, if you are upgrading from a version prior to 5.3, you will be prompted to uninstall your current version. Prior to uninstalling, you should backup your IssueNet database and any customized pages. You can then

uninstall via Add/Remove Programs. Simply uninstall, there is no need to manually delete any directories or files. Once the uninstall is complete, simply run the 5.4 installer to upgrade.

## **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 form 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.

### **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](mailto:support@elsitech.com)

Web Site: [www.elsitech.com/](http://www.elsitech.com/)