



Infor Sales and Service 10.0.1 Release Notes

July 201

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Publication information

Release: 10.0.1

Publication Date: July 23, 2015

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Introduction

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About Infor

Infor delivers business-specific software to enterprising organizations. With experience built-in, Infor's solutions enable businesses of all sizes to be more enterprising and adapt to the rapid changes of a global marketplace. With more than 70,000 customers, Infor is changing what businesses expect from an enterprise software provider. For additional information, visit <http://www.infor.com>.

Overview

These release notes provide supplementary information for the Infor CRM Sales and Service products. These release notes include information about:

- Contacting technical support
- New features
- Resolved issues
- Known issues

Supplementary information is information that was not available when the product manuals and online help systems were first released.

Installation Information

For information about installing patches and full systems, see Infor Epiphany Sales and Service Installation and Configuration Guide 10.0.1.

Printing This Document

If you print this document, the best quality is achieved by printing to a PostScript driver. Other drivers may not reproduce the screen shots as accurately. This document is designed to be printed on two sides of the page. If your printer is not configured for duplex printing, you may find a blank page at the end of some chapters. This is normal.

Contacting Customer Support

You may contact the Infor Customer Support center by submitting your incident via the web 24x7 at <http://www.inforxtreme.com>, or by placing a call during our scheduled business hours. For a complete listing of our support centers with web addresses and phone numbers, access our support site at <http://www.inforxtreme.com>.

Location of the Platform Support Matrix

For more information on platform support, including hardware and software requirements, see the <http://www.inforxtreme.com> web site.

Introduction

This document describes the significant enhancements provided with Infor Sales and Service 10.0.1.

New and improved features

Security vulnerability fixes

The security vulnerabilities, pertaining to LDAP and SQL injection cited by the customers, have been fixed.

New platform certifications

Infor Sales and Service's IT infrastructure support has been extended to include these new platforms:

- IBM WebSphere 8.5.0.2
- Oracle WebLogic Weblogic 12cR2 (12.1.2)
- JBoss EAP 6.1 (AS 7.2)
- Windows Server 2012 R2 (Windows 2008 R2 SP1 is also supported)
- Java 7
- AIX 7.1 SP2
- Red Hat Enterprise Linux 6.4
- SQL Server 2012 (SQL 2008 R2 SP2 is also supported)
- IIS 8 (IIS 7.5 is also supported)
- IBM Http Server 8.5.0

New Features

- Apache 2.4.10
- Windows 7 SP1 client (Windows 8.1 is also supported)
- Internet Explorer 10*/11*
- Android support for Mobile Wireless

Removed platform certifications

To optimize Infor's engineering and quality assurance resources, these environments are no longer supported:

- SuSe
- HP UX
- DB2

For new certifications, see Infor Sales and Service 10.0.1 Platform Support Matrix.

This chapter lists the resolved issues from earlier versions of Infor Sales and Service.

Sales and Service General

EPISS-564 / EPISS-489: data.user_inserted and audit_data.user_updated are sometimes incorrect

The `GlobalAudit.getSafeUserName()` function does not always return the correct user name for each call. The context user name and `userContext` user name are correct, but the Agent BIO `agent_name` value that is returned, is incorrect.

Studio

EPISS-423: Active Editing does not work from the Studio

When Active Editing is accessed from the Studio to debug the UI screens, the login screen is displayed. However, during login, the application returns errors.

UI Framework

EPISS-419: Issues with Active Dispatch and CTI - NPE Exception occurs

When the user is set up for Active Dispatching and CTI, the NullPointerException exception is thrown with this error message:

```
Error Message: System exception while firing customization extensions
```

EPISS-519 / EPISS-458: Push pop-ups not rendering correctly when a modal window is open

When a modal window is open and a push pop-up (like a Task reminder) is created, either a blank pop-up is pushed out or the focus is shifted to the open modal window.

EPISS-520 / EPISS-456: Add To Existing View option in the Save As View window does not work properly in SS10

When you click the **Add To Existing View** option in the Save As View window accessed from any list view screen (**Actions > Save As View**); the corresponding list of options is not enabled.

General Application

EPISS-216: Null Pointer Exception on Organization List View

Navigate to Organization List view and change the name of an organization. Click **View Detail** to view the details of another organization. A message is displayed to confirm the changes made to the **Organization** name. An error is displayed if you click **No**.

EPISS-570: ClientClearWidgetValue extension not working properly

The ClientClearWidgetValue UI Client Side Event extension is not working appropriately. The extension contains the vector parameter `WidgetToClear` which must allow you to clear multiple widget values. However, only one widget value is cleared by the extension.

Group Queue and User Admin

EPISS-561 / EPISS-512: Use of integer value 0 in the first entry field

This is a generic error. Navigate to Lookup categories in Admin Console. Change the Lookup value of the first line code and specify 1. Specify 2 and 3 in the subsequent lines. Now change the first line value from 1 to 0 and also change second line value from 2 to 0. The value changes back to 2. This occurs only when the first line value is zero.

Interaction Management

EPISS-557: Interaction contact popup filtering issue

In the Interaction Detail window, when you use the browse button to view the **Contacts** list, only the relevant contacts of the selected **Account** are displayed. However when you access the **Contacts** list from the **Contact** tab in the Organization Detail window, all the contacts are displayed.

List Management

EPISS-459 / EPISS-261: My Email Drafts list screen has an invalid field that cannot be queried on

Navigate to **Activities > My Email Drafts** window. Specify a value in the **Recipient Address** field and click **Search**. This server error is generated:

```
com.epiphany.shr.data.error.EpiDataException: Query compilation failed because the computed attribute recipient_addresses_computed in bio class message referenced in attribute path message.recipient_addresses_computed is a nonqueryable computed attribute. The implementation class com.epiphany.common.email.extension.bio.ComputeRecipientAddresses does not implement QueryableComputedAttributeSupport. Line: 1 Column: 127
```

CTI

SPISS-420: CTI Slot For Agent not working when "Launch Module At Startup" set to Home

If the **Launch Module At Startup** field is set to **Home**, the **Agent Slot** (CTI) option is not displayed; only the **Notepad** is displayed. Clicking **Home** again, does not resolve the issue. However, if you set the **Launch Module At Startup** field to **Blank**, and click **Home** after you login, the **Agent Slot** (CTI) option is displayed.

Deployer

EPISS-549: After migrating the application from version 7.0.3.2 to 10.0.0, 'EXP_CANNOT_DETERMINE_PLATFORM_TYPE' error is generated

After the migration of the application from version 7.0.3.2 to 10.0.0, the application cannot be started.

This error message is displayed:

```
17:00:08,832 ERROR [PlatformType] 0 EXP_CANNOT_DETERMINE_PLATFORM_TYPE
Error cannot determine platform type. Platform string is weblogic
```

This chapter lists the known issues from earlier versions of Infor Sales and Service.

Infor Global Service Applications

Application - Order Management

99220 Error when Clicking Detail or Preview Buttons in the Order List View in the Popup

This problem is caused by clicking 'detail' or 'preview' buttons in the order list view in the popup.

This typically happens when you:

Go to request detail view with a request selected.

- 1 Click the Order tab.
- 2 Click the 'Add Existing' button: the order list shows up in the popup.
- 3 Search orders (make sure you have at least one showing).

The popup now shows the two buttons in the list view, which is incorrect. The clickable property should have been set to false by default.

Workaround:

Find the local properties in the body slot target of the modal navigation on the 'Add Existing' button in the 'order_list_view_sales_toggle_shell Toolbar' toolbar. Set this property to false. The buttons disappear so the problem does not re-occur.

Infor Global Sales Applications

Infor Global Sales - Opportunity Management

100161 Opportunities may not Show on the Contact Opportunities Tab

In Infor Sales Applications - Sales Opportunities Management, Opportunities may only show under the primary contact of the opportunity, and not show under additional contacts.

Workaround:

None.

Infor Global Sales - Tasks

101692 "Server Error" During Task Search with Global Setting useExactMatchInQBESearches Set to "False"

There is a known issue with setting the Global Setting variable "useExactMatchInQBESearches" to false. The problem arises when you set this to false and attempt to perform a search on text field that is an attribute based on an attribute domain. The problem lies in the QBFormatter code's inability to properly place the '%' wildcard indicator in the query when this Global Setting is turned off. For example, if you are trying to search for a Task that is Assigned to "Bart", the QBFormatter will format the query to look like "Bart @AD assign_to_agent_computed_ad%". This is incorrect. It should be "Bart% @AD assign_to_agent_computed_ad". The result will cause a NullPointerException because the attribute domain name has been fixed with a '%' sign so it can't find the Metadata object with that name.

Workaround:

Use the default setting for the variable useExactMatchInQBESearches which is set to "true". Even with this Global Setting set to true, a user will still be able to perform wildcard searches on attribute domains by appending a '%' to the text field.

Appointment Management

104293 Can Not Change an Appointment Recurrence Pattern from Daily/Weekly/Yearly to a Weekly Pattern

When an appointment recurrence is created using daily/yearly, and then updated to a weekly pattern, the following error message appears: "A value is required for all fields on the exchange pattern screen."

Workaround:

None.

Sales and Service General

EPISS-443: Sorting time increases with BIO dependencies

When you call the `BIO size()` or the `elementAt()` method, the values get initialized internally.

When the user calls the sorting method, the application again tries to process the same action internally. Consequently, the sorting process takes more time.

Workaround:

You can resolve this issue by clearing the state, so that, when the `super.execute()` method is executed, the list values are initialized by the method.

EPISS-433: Exporting the Log Viewer contents to Excel is not supported by Windows 8 / 2012

Exporting the Log Viewer contents to Excel is not supported by the Windows 8 \ 2012 and later Microsoft Operating Systems.

Workaround:

To export the Log Viewer contents to Excel:

- 1 Open the Microsoft Excel and the `log4j` file in the Log Viewer.
- 2 Click **Select All** and copy the `log4j` file data.
- 3 Select the **Tab-Delimited Text** option.
- 4 Paste the contents into the Excel.

EPISS-550: 'User is already registered' error message generated after migrating from 7.0.3.2 to 10.0.0

After the migration from version 7.0.3.2 to 10.0.0, unable to log on to the application. When you try to register, the `User is already registered` error is displayed.

Workaround:

The `USER_DATA` table, displays that the user is defined for the 703x installation machine name. Hence, you must update the user data for the 10.0.0 machine name. To do so, access the OP database for version 10.0.0 and execute this sql command:

```
SELECT * from USER_DATA

update user_data set user_name = '< S&S 10.0.0 machine name>\baan',
user_name_up = '< S&S 10.0.0 machine name >\BAAN' where user_name='<
S&S 7.0.3.2 machine name>\baan'
commit
```

Infor Platform

General App and General Platform

EPISS-288: CSS Style is not applicable to the non-editable representation of an editable widget

The CSS style is not applicable to the non-editable representation of an editable widget. The CSS style, that is applicable to a list form widget, through the Studio, does not get applied appropriately to an editable text box. The style is only displayed when you click in the cell, to edit the value.

Workaround:

None

EPISS-429: Request field's path mapping raising exception for AIX ONLY

As part of customization, when the Request field's path mapping is configured, the exceptions are raised only for AIX. However, the configuration is supported by Windows.

Workaround:

None

Studio

EPISS-421: Tabs are not displaying properly in Studio

The first tab below the main section in the Studio is not displayed properly. The header text is gets truncated, not displaying all the characters.

Workaround:

None.

EPISS-405: Issues with Studio when using Recordset Method Map

In the Studio, define `SELECT` operation. The operation method takes in an `INPUT` and `OUTPUT` parameter. Define an array of objects for the `TOP_LEVEL`. Define the singular object representation as an `ARRAY_ELEM` for the second level after which, are the actual methods that return the data to be mapped with the recordset representation of that object. Double-click the row, to view of the recordset structure. However, the application freezes and does not display the recordset structure.

Workaround:

None.

Channels - Email Service

93845 Inbound e-mail: Japanese Text Attachment is Garbled when Previewing In-line

When you send an email attachment to Epiphany Service, there is no way to indicate what file encoding the attachment uses. Hence, users see garbled characters when they preview it from Epiphany Service.

Workaround:

The workaround is to provide UTF8 encoded files.

Core

95539 KB article - Error When Rebuilding Index in KMS

The CMService was modified with improvements to make it more application server friendly. If you see an EXP_KMS_WHILE_TEXT_EXTRACTION error, then it is likely that you have a text extraction extension that is incompatible with these changes.

Workaround:

If you adapt your extension to use inputstreams from the CMService, then you will stop seeing these problems. Examine ContentToTextTransformer.java as an example.

Core - Data Layer

97472 Cannot Use Bio from UserDataBio.getAgentUserBio() or UserDataBio.getUserData() APIs to Set Relationships

There is a known issue where a Bio or BioBean will result in a ClassCastException. For example, the following code will result in an error:

```
Bio agentBio = UserDataBio.getAgentUserBio(uow, context.getUserName());  
Bio e_lead = null; ... e_lead.set("owner_agent", agentBio); uow.save();
```

Note: You can set the agent_user/user_data Bio obtained from these APIs on HelperBios/QBEBioBeans.

Workaround:

Use the result of calling getBio("Bio") on the agent_user/user_data Bio obtained from UserDataBio.getAgentUserBio() or UserDataBio.getUserData() APIs before using them to set a relationship on a Bio/BioBean. In the above example, changing the first line as follows will resolve this issue:

```
Bio agentBio = UserDataBio.getAgentUserBio(uow, context.getUserName()).get  
Bio("Bio");
```

Core - Metadata

104115 Error JDBC Driver Unsupported Data Conversion when Saving Delta Report Related Modules After Reports are Published

With Crystal Reports integration, once reports are published from Studio, the delta module saved using the command line version of Save Module generates an error. This happens only when the Operational database is on an SQL Server.

Workaround:

Save the report module deltas using Studio.

Core - Push Service

111935 KEEP ALIVE messages will still be sent to the browser regardless of SSO timeout

KEEP ALIVE messages still being sent to the browser regardless of SSO timeout.

Workaround:

Users should properly logout from application browser for PUSH subscription cleanup to happen.

Clicking the 'X' button on the browser after SSO timeout occurs will not be a proper logout. In this scenario, PUSH subscription will NOT be cleaned up properly and unnecessary KEEP ALIVE messages cannot be avoided.

Core - UI Framework

103774 Validation Rules Drop-Down does not Display All Rules

Not all validation rules are visible in the drop-down when trying to associate them with text widgets. It displays only 11 of the pre-defined 17. If you add a new one of type "Alpha", it would be displayed in the drop down, but not if the type is numeric or not_null.

Workaround:

None.

Infrastructure - Scheduler

99756 Daylight Savings Scheduler to Run Jobs out of Sync by 1 Hour

Scheduled jobs do not recognize Daylight Saving time change even though the application server times have been adjusted.

Workaround:

All scheduled jobs need to be re-saved every time there is a change in time based on daylight savings. You will specifically need to change the schedule time to something new, save it, and then re-change it back to the correct time.

111950 Cluster jobs fail with unknown node name and data source errors (any app servers)

This is a known issue that occurs when a SS system is built from an existing backup. The backed up system might have been configured with different cluster members and different data source names. If the new system is configured with different nodes and data sources, the `cws_heartbeat` table could still contain node names and data sources from old configuration.

Workaround:

Clearing the `cws_heartbeat` table will resolve this issue.

Infrastructure - SSO Client

94373 Application Recovery Issues from Restart of Unresponsive LDAP Server

The application server becomes unresponsive in an environment where connectivity to the LDAP server is unstable or the LDAP server becomes unresponsive.

Workaround:

Configure the timeout interval by adding a new property to the `installer_<server>.properties` file:

```
ldap.client.timeout=600000
```

The value 600000 is in milliseconds which is 10 minutes. (1000 milliseconds = 1 second). If you are on a cluster, do this for each server in the cluster.

Installer and Deployer

EPISS-164 JDBC shrink frequency in WebLogic set to 900 (instead of being disabled)

Workaround:

Set it manually to 0.

EPISS-551: KMS index_dir not set properly after the migration/upgrade of S&S 7032 to 10

After the upgrade/migration of the application from the version 7.0.3.2 to 10.0.0, KMS `index_dir` generates this exception:

```
com.epiphany.shr.util.exceptions.EpiException: Configuration parameter
index_dir did not resolve to reachable directory or directory does not
exist: d: \ocrm703x\shared\kminindex at
com.epiphany.shr.kms.search.service.engine.SearchEngineServiceBean.init
```

Workaround:

You must update the `index_dir` parameter to refer to the correct location. To update the parameter, execute these steps:

- 1 Go to **SS 10 Studio > Administration > Services**.
- 2 Search for **KMSSearchEngineService** under **Name**.
- 3 Update the `index_dir` parameter to refer to the correct location for `SS_INSTALL\shared\kminindex`.

EPISS-587: Migrating from S&S 10.0 to 10.0.1 gives error

Trying to migrate from S&S 10.0 to 10.0.1 gives error, while executing below command

```
ssdeploy.bat "C:\Infor" migrate10fp1
```

Workaround:

Before running the migrate command, copy the `SSDeployMain.xml` file from `10.0.1.0_DevDrop_EPISS-587_Migrate_10_To_1001` Devdrop into the `<FP_Directory>\ssdeployer_ss1001\ss1001\ssdeployer` S&S 10.0.1 deployer folder. And follow the steps mentioned in the “Migrating Existing Environments to 10.0.1” of Installation and Configuration Guide, and run below command to migrate.

```
ssdeploy.bat "C:\Infor" check
ssdeploy.bat "C:\Infor" migrate10fp1
```

Ming.le Workspace Integration

EPISS-382 / EPISS-328 Ming.le SSO not properly functioning on Chrome, Safari, Firefox

The user keeps getting login prompt when trying to login to Ming.le with SSO enabled.

Workaround:

None.

Multi Browser Support

114373 Performance Viewer does not work on FireFox

The Performance Viewer, a diagnostic tool for internal development to diagnose performance on the client side, does not work on FireFox.

Workaround:

None.

114276 XML Attachments are shown as text in IE9

The XML documents attached in the Sales and Service application are shown in text format when they are viewed by the Preview option. This is an issue in Microsoft IE9, namely, that XML documents displayed in an iFrame show as text files.

Workaround:

None.

EPISS-358 Firefox Ctrl + Left Click on menu is not working properly

On Firefox, when the user clicks on a menu item while Ctrl is pressed, a blue highlight appears on the clicked area. The highlight disappears when the screen is refreshed or if the user switches to a different tab.

Workaround:

None.

Organizations

112729 New Related BIO dirty bit does not reset if you clear out the fields on MWireless

Any MWireless form that contains attributes for related BIOs (i.e. not the primary BIO focus) will become dirty as soon as you start entering information on any attribute for that related BIO. Once the related BIO becomes dirty, it will remain dirty even if you remove the all contents of the attribute by using the backspace key. Unfortunately, since the BIO is marked dirty, when you click on the Save button, it will attempt to save the BIO with empty fields causing the save to fail.

Workaround:

Either enter the missing information, or click on the "back" button to return to the previous screen without saving.

Shared Service - Workflow Engine

98878 Performance Problem in Workflow's Processing of Auto-Completion Conditions

A task in a workflow in `crmWMCKBWorkflow.ebm` and another task in a different workflow in `crmWMCKKnowledgeDocumentTranslation` have completion conditions that are never met.

These are the conditions that never complete:

```
Many tasks are in document status D12BA601F4954A8F94348FE641A0F1D3 where
states          58B9C42D68024623BC796A453A48C7DC          or
21C487CAB6604B6AADBAB35B0C338DEA would complete a task.
```

These states may be customized values for the `document_status_ad`.

Workaround:

Change the Workflow tasks so they never get caught in this immovable state.

Shared Service - Operational Reporting

91542 Reports With Parameters That Accept a Collection of Values Do Not work

When you run a report, the parameter value entry screen is an Epiphany form and this form does not have support for parameters that accept a collection of values.

Workaround:

Do not create reports with parameters that accept a collection of values.

Shared Service - RT Integration

104438 Unable to See Offer History from Interacion Lower Tab Option

When you accept an offer from an interaction and link it to an individual, the offer history does not display the offers.

Workaround:

The offer history can be seen by selecting the Individual and clicking on Offer History.

Tools - General

69187 Studio Errors in Lookup Category Export/Import

There are Studio errors in the lookup category export/import.

Workaround:

Use the deployment unit.

99577 Datetime Picker-form_widget does not Work with TEMP Mapped BioAttribute

When a Form-widget of type "datetime picker-form_widget" is associated with a BioAttribute with a type "DATE" and Mapping Type "TEMP", the resulting widget is a simple text widget.

Workaround:

The form widget can be assigned to the bioattribute and use a UI-action extension to assign the value of the widget to the bioattribute at a later time. (However, this is somewhat confusing and not the preferred way to do things).

Tools - Installer

111155 Bootstrap user role isn't created in metadata after 7.0.4 installer runs successfully

During the 7.0.4 installation process, one of the prompts asks for which user you would like to use as the "initial administrative user" and password (also known as the 'bootstrap' user). This user must already exist in your SSO server (NTLM/LDAP or ADS). In addition, you must assign an administrative user group or role for the bootstrap user, in metadata in order for the user to be able to login to application. This step needs to be followed after S&S installation but before the server is started. If the server has already started, then make the changes and restart the server.

To assign the administrative role:

- 1 Open Studio
- 2 Navigate to Administration -> Permission -> User Roles.
- 3 Look for the "administrator" user role name and change the default SSO User Role name from "Administrator" to the fully-qualified path name of your Administrator role on your SSO Server.

For example, in LDAP with a group called "administrators", you would change this value as follows: `cn=administrators,ou=groups,dc=infor,dc=com`. Any member that is assigned to be part of the "administrators" group will then have administrative access to the application.

UI Framework

EPISS-412 Pipeline display error

The Pipeline is not correctly displayed when viewed.

Workaround:

Hitting the magnifying glass makes the pipeline display properly.

EPISS-152 / 117994 Attachment not filling up preview popup window even when window is maximized.

When an attachment (e.g. PDF) is displayed in a preview window, only about half of the document is displayed, even if the window is resized to full screen.

Workaround:

None.

EPISS-212: Notes section does not gray out when the notes are saved

In the Individual/Organization screen, when the Notes widget is `readonly`, the **Notes** tab description area is disabled but not grayed out.

Workaround:

By default, the Notes section is not grayed out for the `textarea-form_widget` and the `html editor-form_widget`, when the widgets are `readonly`. To resolve this issue, navigate to `user_note_detail_view` form from the Studio. Select the 'notes' widget and set the widget style to `readonly`, in the Property window.

EPISS-441: Issue with OOB code SharedPopulateIDAuditForm

The OOB code `SharedPopulateIDAuditForm` is used in the `Sales_shared_id_audit_display` and `Sales_shared_no_id_audit_display` forms. This code is not working for the `Sales_shared_no_id_audit_display` form when setting the value for the widget.

Workaround:

None.

EPISS-468: Chrome/Firefox browsers freeze when the user signs out of SSO

After configuring the SSO using the portal, when the user accesses the application from outside the portal without the SSO, the application is supported by the IE, Chrome and Firefox browsers. However, when you access the application within the portal using the SSO, only the IE browser supports the application.

Workaround:

None.

EPISS-559: User screen freezes when resizing

After the upgrade from version 7.0.3.2 to 7.0.4.2, when the user tries to resize the UI, the screens stay collapsed and the user is unable to expand the UI again.

Workaround:

None.

Infor Mobile Wireless Applications

General

113056 Some of the List View Advance Search date fields are not retrieving the expected results

An exact-match search on the following Date fields on the following Advance Search screens do not return the expected results:

- Organization Detail> Sales Person> Advanced Search> Start Date, End Date
- Opportunity Detail> Sales Person> Advanced Search> Start Date, End Date
- Opportunity Detail> Product Bundle Advanced Search> Effective From

Workaround:

Use an operator to specify a time period (rather than one specific date) and then perform the search. For example enter ">10/3/09" rather than "10/4/09".

Interactions

112930 Obsolete dropdown values do not show-up in the dropdown lists

Obsolete dropdown values do not show-up in the dropdown lists. If an instance of an entity has an obsolete value for a drop-down attribute, the value will be shown as null in the Mobile Wireless application.

Workaround:

None.