CORETRAC

Release Notes

Version: 3.80

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Introduction

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

What's New in CoreTrac 3.80

LoanSource

In CoreTrac 3.80, we have come up with a new LoanSource application.

LoanSource is a web application for the loan officers designed to more efficiently manage loans in process. It enables you to access information about various components of your business using a browser or a Tab.

It is a light weight application specifically designed for the Loan officers responsible for the loan products. This application offers an option to create custom dashboards making it easy for the Loan Officers and Loan Managers to track opportunities and manage appointments while on the go from their mobile device. The widgets available with LoanSource are:

- Compemsation
- Goals
- Loans in Progress
- Pipeline
- Production
- Upcoming Activities

You can view or edit the dashboards for the widgets in the **Home** screen. You can view or edit the opportunities segregated by sales stages in the **Pipeline** screen. You can view or edit the tasks and events in the **To Do List** screen. For more details on LoanSource, refer to the *LoanSource User Guide*.

Issues Fixed in CoreTrac 3.80

Branch Report

Fixed an issue in the Branch Performance Report. The Branch Performance report was showing an error while converting data type varchar to numeric.

Dashboard

Fixed an issue where a blank dashboard appeared when the user had large number of past due events and a large number of events that have occurred.

Goals

Fixed an issue where only 50 user goals were appearing in the user's drop down list.

Upgrade

Fixed an issue where an upgrade to 3.76 SP1 was creating an error. An error log was being created when the user tried to create an opportunity from the Recommendation tab of the snap shot screen.

Queue with Multi-Select Active

Fixed an issue where the user was unable to send the product to a queue with Multi-Select active.

Emails from Snapshot

Fixed an issue where referral emails were not being sent while creating a referral from the Recommendations tab of the snap shot screen.

Known Issues

The following are the known issues at the time of CoreTrac 3.80 release:

Pipeline Report

Pipeline reports are not generated and the status for the report is shown as error.

My Desk

An error message is displayed while navigating to **My Desk** from **Service Center** in ResourceOne.

Deployment Procedure

Deploying CoreTrac 3.80

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="EnableAllUserGenericProductAccess" value="False"/>`
   - `<add key="LSMaxAllowedAttachmentSize" value="1024"/>`
   - `<add key="LoanSource_Todo_DaysInterval" value="30"/>`
6. Go to `Templates\Portal` under the ResourceOne directory.
7. Open the **Default** XML file and add the following settings (if the settings are not present):

```
<item text="Dispositions"
navigationurl="~/Administration/SortableDataList.aspx?
PageMethod=OpenCustomTypeListing&amp;id=0FA5E14A-59E0-4624-990D-
```

```
7241949A55CD" permission="3263EBC8-84E9-4A16-B8B8-9ADAF4F40B1C"
></item>
```

8. Go to `Templates\Page\Activity` under the ResourceOne directory.
9. Open the **Default** XML file and modify the Sales Stage and Referral Source settings as below (`inActiveTextAppendix=""` is added at the end of the line)

   - `<options source="org" table="referral_source" valuefield="referral_source_id" namefield="referral_source" sortfield="referral_source" sortorder="asc" onnewactiveonly="true" inActiveTextAppendix="">`
   - `<options source="org" table="sales_stages" valuefield="sales_stage" namefield="sales_stage" sortfield="sort_order" sortorder="asc" onnewactiveonly="true" inActiveTextAppendix="">`

10. Open the build folder and upgrade with the following procedures:

    - To upgrade from CoreTrac 3.76 to CoreTrac 3.80:
      - Go to `Upgrades\Scripts.zip\3.76.H1`
      - Execute all the scripts present in the folder.
      - Go to `Upgrades\Scripts.zip\3.76.1`
      - Execute all the scripts present in the folder.
      - Go to `Upgrades\Scripts.zip\3.80`
        - Execute the following scripts under **Common** folder:

          `1000 - Create Schema and Upgrade Tables.sql`
        - Execute all the scripts under "CTadmin" folder.
        - Execute all the scripts under "BankDB" folder.
    - To upgrade from CoreTrac 3.76 SP1 to CoreTrac 3.80:
      - Go to `Upgrades\Scripts.zip\3.80`
        - Execute the following scripts under **Common** folder:

          `1000 - Create Schema and Upgrade Tables.sql`
        - Execute all the scripts under **CTadmin** folder.
        - Execute all the scripts under **BankDB** folder.

Deployment Rollback

1. Replace the legacy files (dcom, muu, www) files from backup folder with UDL changes.
2. Replace ResourceOne files from backup folder by keeping same `header.htm`, Config files, (envsettings and log4net), Datamaps (xml files), templates folder and subfolders (xml files).
3. Open the envsettings config file and remove the following settings:
    - <add key="EnableAllUserGenericProductAccess" value="False"/>
    - <add key="LSMaxAllowedAttachmentSize" value="1024"/>
    - <add key="LoanSource_Todo_DayInterval" value="30"/>
4. Go to `Templates\Portal` under the ResourceOne directory.
5. Open the **Default** XML file and remove the following settings:

```
<item text="Dispositions"
navigationurl="~/Administration/SortableDataList.aspx?
PageMethod=OpenCustomTypeListing&amp;id=0FA5E14A-59E0-4624-990D-
7241949A55CD" permission="3263EBC8-84E9-4A16-B8B8-9ADAF4F40B1C"
></item>
```

6. Go to `Templates\Page\Activity` under the ResourceOne directory.
7. Open the **Default** XML file and modify the Sales Stage and Referral Source settings as below (`inActiveTextAppendix=""` is removed from the line)
    - <options source="org" table="referral_source" valuefield="referral_source_id" namefield="referral_source" sortfield="referral_source" sortorder="asc" onnewactiveonly="true">
    - <options source="org" table="sales_stages" valuefield="sales_stage" namefield="sales_stage" sortfield="sort_order" sortorder="asc" onnewactiveonly="true">
8. 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).