



SmartConnect 2013 SP1 Hotfix 3 Release Information and Upgrade Instructions

Release Information

Bug Fixes (2013 SP 1 Hotfix 3)

1. Dynamics GP Connector

- Note: Custom Nodes don't appear as updated until System Maintenance is run a second time.

2. Generic Connector

- Global Variables aren't populated correctly without initializing in a Task first.
- Multiple datasource fields passed into a Run SQL command as parameters aren't recognized.
- WCF REST Web Service doesn't return error collection properly.

Bug Fixes (2013 SP 1 Hotfix 2)

1. Dynamics GP Connector

- a. GP 10 Real Time data source do not call web service correctly.

2. Generic Connector

- a. MSSQL change data sources do not save the query when it is modified from the Query Builder.

3. Dynamics CRM 2011 Connector

- Fix error "Cannot access a disposed object" when a map contains a CRM data source and destination.

Bug Fixes (2013 SP 1 Hotfix 1)

1. Dynamics GP Connector

- a. Issue upgrading connector settings from versions of SmartConnect earlier than 2012 SP2.
- b. Error saving an Extender 2013 window that contains a list field.
- c. In some instances eConnect incorrectly called twice for Dynamics GP 2010 destinations.

2. Dynamics CRM 2011 Connector

- a. Incorrect error message is displayed when SmartConnect check change tables.
- b. Object not found error in multi lookup columns.

3. Generic Connector

- Error when restricting out lines in the SQL stored procedure destination.

Features (2013 SP 1)

1. General

- Task Processing
 - i. Ability to have a SmartConnect task stop all processing without returning an error.
 - ii. Include processing and validation errors in post map email tasks.
 - iii. Enabling and disabling of tasks
 - iv. Moved tasks and variable defaults to map setup window.
 - v. The Run Map task can be set to show the map run in a visible tab rather than always running in the background.
- SmartConnect client configuration tool
- Added ability to view SmartConnect trace tables from within the UI.
- Added ability to view SmartConnect entries to the Event Log within the UI. (Excludes login errors)
- Save processing errors to Excel from the Process Errors screen.
- Enhancements to translation table columns.
- In many places drop down lists that contained many records have been changed to lookup windows that may be filtered.
- Real time data source lists now show the number of linked maps, and whether or not they have been registered.
- Administrative functions have been moved to an Admin/Upgrade tab and are password protected.
- Ability to delete multiple maps at once from the map list.

2. Generic Connector

- Multi data source
- Folder real time triggers
- Folder data source can now move files even if there is no data in the file.

- Added Excel 2013 to folder data sources

3. Dynamics GP Connector

- Ability to add an eConnect node to the same node type multiple times (copy node).
- Ease of use enhancements to the node maintenance window.
- Excel template wizard.
- Updated extender functionality for extender and GP 2013
- Ability to bypass the eConnect proxy and use the current windows credentials when connecting to eConnect.
- Updated eConnect nodes and fields within SmartConnect for Dynamics GP 2013

4. Dynamics CRM 2011 Connector

- Excel template wizard

5. Web Service Connector

- Added support for web service data sources
- Ability to export and import setups for web service data sources and destinations

6. SmartConnect Services

- Added the SmartConnect WCF REST service

Bug Fixes (2013 Service Pack 1)

1. General

- Ability to change the case of a local constant in node mapping window.
- Alert users when SmartConnect system maintenance returns errors.
- Allow users to open web service URL's to check them.
- Summing a column in the node mapping screen then immediately mapping the column no longer causes the column to lose its sum settings.
- All file dialogs should now default to the current path when opened / re-opened.
- Map list not refreshing correctly when deleting a map.
- Connection details can now be changed for MSSQL change data sources.
- Speed up the system login process.
- System will now check if global variables are in use before deleting them.
- Process errors window will now always show the error causing the processing failure regardless of map settings.
- System maintenance will now correctly alert users to maintenance processing failures.
- Schema.ini settings now correctly saved with the map when defined on text file data sources.
- Data source preview column names will now show the correct name. (spaces are no longer added for columns with names in camel case)

- Script validation will no longer fail if the script window has been open for more than 5 minutes.

2. Generic Connector

- Move files matching the source template in a folder data source even if they contain no data.
- Fixed issue with worksheet not being found in some instances with Excel 2003 data source.
- Fixed error with amending the MSSQL server on a MSSQL change data source.
- Fixed issue causing ODBC failures when connecting to Oracle databases through the ODBC data source.
- Default security settings are automatically created for all new SmartConnect users without the relevant screens being opened.
- Ensure user global variables are not being used before deleting them.
- Chained maps will now show the processing details of child maps.

3. Dynamics GP Connector

- Extender nodes taExtenderNoteDeleteAll and taExtenderNoteDelete are now created correctly for Extender 2013.
- System maintenance will now remove all real time and SmartList data sources from the DYNAMICS database and re-register them
- Fixed index out of range error for FA Create Asset Book ITC node.

4. Dynamics CRM 2011 Connector

- Change Data Sources (managed within SmartConnect) will now clear down transactions correctly via the windows service.

5. Salesforce Connector

- Removed current Salesforce real time data source web service and replaced with new WCF REST web service. Fixes all known issues with real time data sources from Salesforce.
- Fixed issue where child records queried via SmartConnect were limited to 200 records.

Features (2013)

7. Salesforce Connector

- Ability to update more than one entity in a single run.
- Entity lookups no longer fail if they do not return a value.

- Support for lookups within lookups.
- Unique records will be defined in the following order
 - i. External fields (External Id that is setup against the entity in Salesforce)
 - ii. Id records (The unique record of the entity in Salesforce)
 - iii. Grouped columns (Grouped Columns on the map line in SmartConnect)
 - iv. Map key fields (The key fields on the map in SmartConnect)

8. Dynamics GP Connector

- Extender 2013 data source and destination support.
- Extender map upgrade from prior versions to 2013. (**NB: Please see Extender Upgrade at the end of the document.**)

Bug Fixes (2012 Service Pack 2 Hotfix 2)

2. Dynamics GP Connector

- Adding nodes for Extender Enterprise installed the wrong nodes

Features (2012 Service Pack 2)

1. Generic Connector

- Added the following ODBC connection strings:
 - Excel 2013.
 - SQL 2012, integrated and SQL security.
 - Access (2007, 2010 and 2013)
- Added Excel 2013 data source.

2. SmartConnect Main

- Added date / time of map lock to activity window.
- Ability to maintain / add default connections in all screen where they are used.
- Global setup of scripting language (C# or VB)
- Encryption of SmartConnect map exports.

3. Dynamics GP Connector

- Support for the following GP 2013 features:
 - Naming of dynamics database.
 - Real time data sources triggered from the Dynamics GP web client.
 - eConnect 2013.
- Ability to export GP nodes through SmartConnect node maintenance.

4. Dynamics CRM 2011 Connector

- Update blank data.
- Allow mapping to a wider range of CRM 2011 web service methods.
- Return option set labels instead of values for all CRM 2011 data sources.

- SmartConnect can now perform the following for CRM 2011 change data sources:
 - Create the change table inside CRM 2011.
 - Create the change records within CRM 2011 (via plugin processing)
 - Filter CRM 2011 changes so only changes to specified fields trigger creation of a change record.
- Ability to restrict the triggering of CRM 2011 real time data sources to instances where specified fields have changed.
- New connector column types:
 - Column Set – specify columns to be passed to system processing when new records are created from processing current records.
 - Multi Lookup – single lookup into CRM 2011 that returns multiple columns/
 - Label – provides ability to update meta data labels.
 - Entity Reference – created entity reference object when Id(GUID) information is known.
 - Relationship – select the required relationship with associating records.

5. Dynamics CRM 2011 Connector

- Support for sending SmartConnect destination messages to user definable external web services.

Features (2012 Service Pack 1)

9. Generic Connector

- Added a schema.ini option to the text and folder text data sources to automatically create schema files before a map runs. This will allow the user to setup column data types.

10. SmartConnect Main

- Process errors now log the errors per tenant. So records that fail can now be processed per Map tenant
- The Run Map as User has changed from specifying a user to a checkbox that will allow anyone to run the map.

11. SmartConnect Scheduler

- Extensive changes have been made to SmartConnect around scripting and SQL connections.
- This will resolve the following issues :
 - System Out of Memory
 - Scheduler hangs and does not process any maps

12. CRM 2011 Connector

- Ability to access CRM Online provisioned through Microsoft Office 365.

Features (2012 Main Release)

1. New User Interface

- Map data source and destination is now in the same panel and easier to maintain.
- Allow sort by and grouping on all columns of the map data grid window
- Searching functionality on the map data grid window
- Searching on the source and destination grids on the mapping window
- New color coding on all scripting windows

2. Dynamics GP Connector

- Extender change data source maintenance now available

3. Generic Connector

- MS SQL change data source maintenance now available
- XML Query Data Source (Also available as a folder data source)

Bug Fixes (Hotfix)

1. Generic Connector

- OLEDB data source validation error. The error that caused the “Data source name not found” issue has been resolved.

Bug Fixes (Service Pack 1)

2. Dynamics CRM 4 and CRM 2011 Connector

- Linking a table to itself in CRM query data source causes SmartConnect to crash.

Upgrade Instructions

1. Uninstall the current version of SmartConnect
2. Run the SmartConnect installer.
3. Agree to the license terms and conditions then select Next.
4. Select the installation type required.
 - Client - selecting this option auto selects the SmartConnect user interface for install. The install process also assumes that the MSSQL SmartConnect database has already been set up and so will not ask for credentials to create and set up the SmartConnect database.
 - Server - selecting this option auto selects the SmartConnect user interface, as well as the windows and web services. This process will also ask for MSSQL credentials to create and set up the SmartConnect database.
5. Select the SmartConnect components for this install.
 - **SmartConnect**
 - i. **User Interface** - required to access SmartConnect to create / manage or run maps.

- ii. **Windows Service** - required if this install is to be used for SmartConnect scheduled processes. Note: only one windows service install is required in order to schedule SmartConnect maps and processes.
 - **Web Service** - required if this install is to be used to process Dynamics CRM real-time data sources, Dynamics GP real-time data sources, Dynamics GP SmartList data sources, data pushes from the SmartConnect Excel Add-In, or run other processes via the SmartConnect web service. Note: only one web service install is required to support these processes.
 - **SalesForce Web Service** - required if this install is to be used to process Salesforce real-time data sources. Note: only one web service install is required to support this functionality.
 - **Great Plains 10** - required on at least one Dynamics GP machine to create the GP Resource Cache within Microsoft Dynamics 10. Also required if real time data or SmartList data sources are to be triggered from within Dynamics GP.
 - **Great Plains 2010** - required on at least one Dynamics GP machine to create the GP Resource Cache within Microsoft Dynamics 2010. Also required if real time or SmartList data sources are to be triggered from within Dynamics GP.
 - **Great Plains 2013** - required on at least one Dynamics GP machine to create the GP Resource Cache within Microsoft Dynamics 2013. Also required if real time or SmartList data sources are to be triggered from within Dynamics GP.
 - **eConnect for Microsoft Dynamics GP 10** - required if updates to GP 10 are required, and eConnect for GP 10 has not already been installed.
 - **eConnect for Microsoft Dynamics GP 2010 64 bit** - required if updates to GP 2010 are required, and eConnect for GP 2010 has not already been installed. Only appears for 64 bit machines.
 - **eConnect for Microsoft Dynamics GP 2010 32 bit** - required if updates to GP 2010 are required, and eConnect for GP 2010 has not already been installed. Only appears for 32 bit machines.
 - **eConnect for Microsoft Dynamics GP 2013 64 bit** - required if updates to GP 2013 are required, and eConnect for GP 2013 has not already been installed. Only appears for 64 bit machines.
 - **eConnect for Microsoft Dynamics GP 2013 32 bit** - required if updates to GP 2013 are required, and eConnect for GP 2013 has not already been installed. Only appears for 32 bit machines.
 - **Note: Since SmartConnect 2011 SP1 CRM support file installation is no longer required**
6. Enter the required information about the SmartConnect installation. Select Next to continue.
- Select the folder where SmartConnect should be installed.
 - Enter a password for the SmartConnect user. Remember this password as it will be required in the event of installations on other machines.
 - If this is an upgrade from a version that did not require the entry of the SmartConnect password, use *SmartConnect* here.

- If the installation has been run on other machines, enter the same password as was entered on the initial machine.
 - Enter the name of the MSSQL server where the SmartConnect database should be created.
 - Enter a MSSQL login and password to be used to connect to the MSSQL server. The user selected must have security to create the SmartConnect user and database.
- 7. If installation of the windows service has been selected, enter the required information for the service setup.
 - Enter the domain of the service account
 - Enter the username of the user that will run the service (must have log on as a service rights)
 - Enter the user password
 - Enter the MSSQL server name (defaults if entered previously)
- 8. If installation of the SmartConnect web service has been selected, enter the information required then select Next.
 - Enter the domain of the web service account.
 - Enter the user to be used for impersonation on the web server.
 - Enter the password.
 - Enter the MSSQL server name (may default if entered previously)
- 9. If installation of the Salesforce web service has been selected, enter the required information then select Next.
 - Enter the domain of the web service account.
 - Enter the user to be used for impersonation on the web server.
 - Enter the password.
 - Enter the MSSQL server name (may default if entered previously)
- 10. If a Dynamics GP version has been selected, enter the path to the GP installation, then select Install.
- 11. Select finish to close the installation window.

Extender Upgrade Instructions

1. Make sure extender is upgraded to 2013 on the GP machine.
2. Confirm all views in extender are still working and all the fields are included.
3. Log into SmartConnect
4. Go to Setup → Setup → SmartConnet Dynamics GP Connector
 - Change the GP Version to 2013
5. Go to Setup → System Maintenance
 - Run system maintenance
6. Go to Maintenance → Upgrade Extender
 - Wait for the form to load all maps
 - Click upgrade

- The process will run through all maps that has extender data sources and destinations and upgrade them to 2013.