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MAKING CRM MAKE SENSE

Infor CRM v8.2.0  
**Initial Testing of Windows 10 Pro  
(Insider Preview)**

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# 1.0 OVERVIEW

This document provides an early look at any issues with Windows 10 Pro and Infor CRM v8.2.0.

The testing was performed with Windows 10 Insider Preview (v10130) and SQL Server 2014 (64bit). This was hosted on VMWare Workstation 11.1.

## Executive Summary

There appears to be no major issues with Windows 10 and Inform CRM 8.2 that would stop an installation/upgrade from proceeding.

The screenshot shows a Windows 10 desktop environment. On the left is the Start menu with various application tiles including File Explorer, Settings, Control Panel, Internet Explorer, Project Spartan, Sticky Notes, Paint, Skype, Photos, London Mostly Cloudy, Weather, Explore Windows, Get Started, Store, and ebay. The main desktop area displays several open windows. The largest window is the Infor CRM client, showing a contact record for John Abbott. Other windows include a 'Users - Hutchinson, Barb' window displaying a list of users with columns for Login, User Type, Username, Name, and Title. The user list includes Administrator, barb, Brian, cathy, dan, denek, ed, irena, Georgina, hans, and juv. The taskbar at the bottom shows icons for Microsoft SQL Server, Saleslogix Admin..., Infor CRM - [Cont..., and Architect.

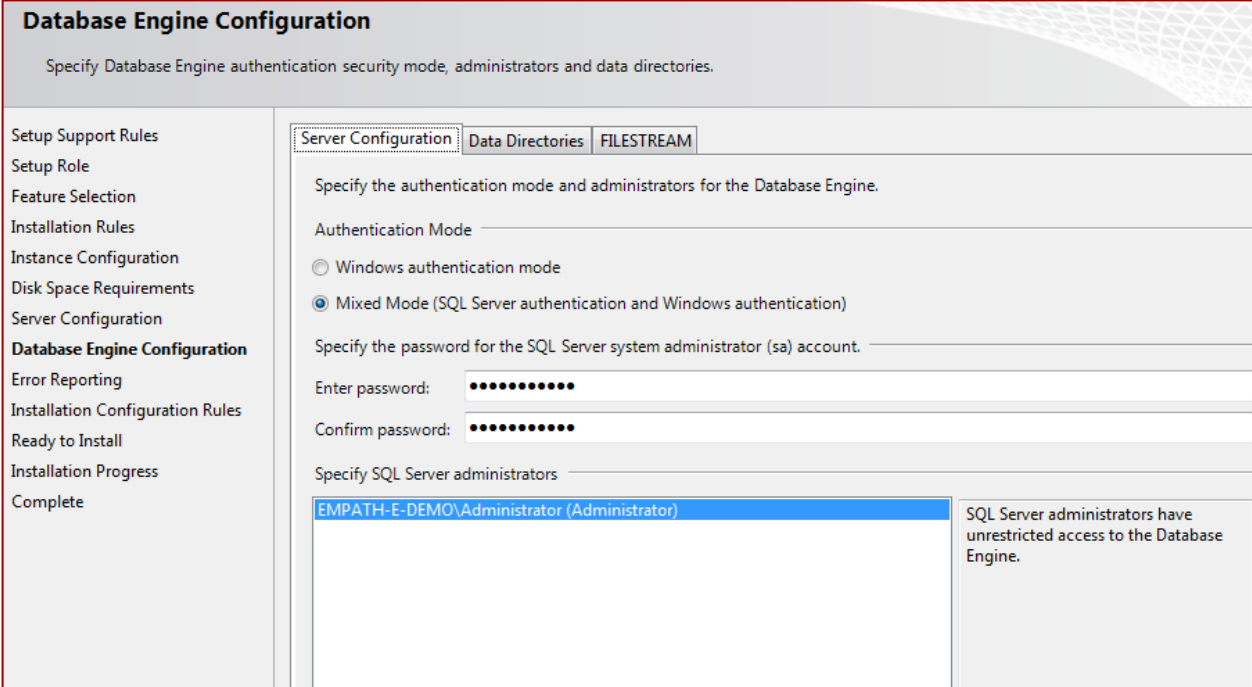
The screenshot shows the Infor CRM web dashboard. The top navigation bar includes 'Infor CRM', 'Recently Viewed', 'New', 'Schedule', and 'Tools'. The main content area is divided into several sections: 'My Dashboard' with a pie chart showing sales distribution; 'Open Opportunities' with a bar chart titled 'By Sum Of Sales Potential'; 'My Pipeline' with a funnel chart showing stages from Global to Highest; and 'My Top Opportunities' with a table listing key sales opportunities. The table includes columns for Description, Est. Close, Potential, Prob, Weighted Amount, and Account. The taskbar at the bottom shows icons for Infor CRM, File Explorer, Settings, Saleslogix, and other applications.



## 2.0 INITIAL SETUP OF WINDOWS 10 (IP2) & SQL2014

Follow a normal installation of Windows 10 Pro Insider Preview and SQL Server 2014. The only change to SQL Server 2014 was to ensure that Mixed Mode was selected during the installation. SQL Server was then updated to SP1 prior to installation of Infor CRM.

More information on Windows 10 can be found [here](#). More information on SQL Server 2014 can be found [here](#).



The screenshot shows the 'Database Engine Configuration' wizard. The 'Server Configuration' tab is active, showing options for authentication mode. 'Mixed Mode (SQL Server authentication and Windows authentication)' is selected. The password for the SQL Server system administrator (sa) account is entered and confirmed. The list of SQL Server administrators includes 'EMPATH-E-DEMO\Administrator (Administrator)'. A note on the right states: 'SQL Server administrators have unrestricted access to the Database Engine.'

When prompted, it is important that you select **Mixed Mode** on the server configuration.

The installation will then complete in the normal way and you will have a working SQL 2014 you can then apply SP1 if you wish, although this is not necessary.

**Important:** if you need to use synchronisation you will need to adjust the collation of the system during the installation. Be sure it matches "**SQL\_Latin1\_General\_CP1\_CI\_AS**"

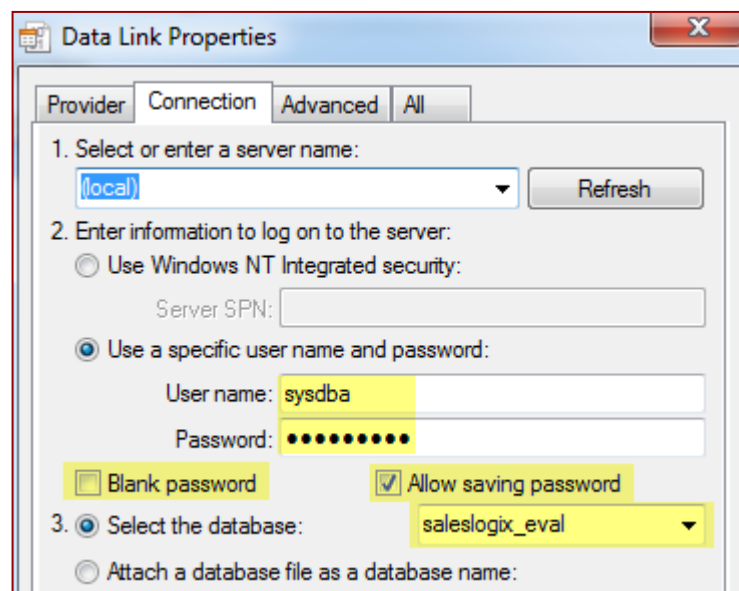


## 3.0 OBSERVATIONS

- 1) Install of Inform CRM 8.2 was via the Full Install of "Required Admin Tools & Servers"
  - a. The installation seems to pause for 3 minutes – just need to wait
  - b. The installation does NOT offer to install the demo/blank database (you can do that manually via the Installer menu.
  - c. If you install the Remote Client – it will download and install SQL Express 2012 during installation. This is non-optional.
- 2) You will need to manually setup a connection using Connection Manager. You will use the SQL Native Client 11 (installed automatically). Ensure that you modify the properties to blank out the "Integrated Security" and set "Persist Security" to True.
- 3) Or, you can re-run the installation and select Custom Installation and select the options you need. We are unsure if the issue here relates to the Full Install – as the Custom installation worked fine (we usually use Custom anyway).
- 4) When installing the SalesLogix Remote Client – you will be forced to install SQL2012 Express Edition. You cannot cancel out of this and the installation will not proceed without it. Therefore, you are limited to using SQL2012 Express as the remote database (or installing manually on another platform, such as 2008)

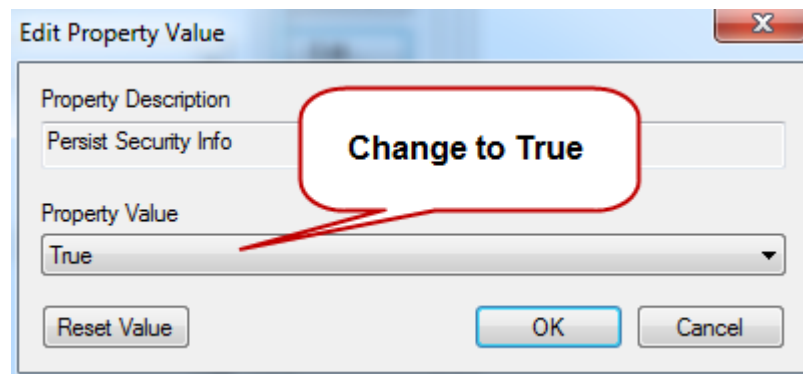
### *Creating a Connection using Connection Manager*

Add the connection as normal (using the Native Client 11.0 that will now appear). Point it to your server and ensure these options are selected:



As with prior installations, starting with SQL2008 you will need to choose the **All Tab** and set the following. You **must** do this while setting up the connection.





## 4.0 RUNNING INFOR CRM 8.2 & TOOLS

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### ***Client***

During a short test run of the Infor CRM Client no issues were discovered. The client could login without issue and it seemed to work as before. Activities, Reports, Insert/Delete/Update all appeared to work as expected. There were no UI issues observed.

### ***Architect***

We found the following issues with Architect:

- Running Architect invokes a UAC prompt (this also occurs in v8.1)
- General UI works as expected
- The **Drop Field** option only showed the ATTACHMENT table and no others in the drop-down
- Managing a report (without Crystal installed) does not report that Crystal is installed. It checks out the report and then does nothing further (to indicate an issue)

### ***Admin***

- General UI works as expected
- All linked options work (Tools | etc)
- Modifying users/settings worked as expected

### ***Application Architect***

- General UI works as expected
- Appeared to work (could not build a full web implantation as Windows Pro)
- Rebuild worked to completion without errors.

### ***Synchronisation Server***

- Ensure the SQL Native Client from 2005 is installed (`[cd]:\Redist\SQLClient\2005\x64`)
- Ensure that the database is set for the right Collation Sequence (see Page 1)
- Synchronisation Server ran as expected with no issues noticed

### ***Synchronisation Client***

- The client was able to login and data passed up/down between Host and Remote successfully.

### ***Web Client***

- This was only lightly tested – but the new browser (Microsoft Edge/Project Spartan) was used against a working Infor CRM 8.2 Web system and all appeared to work OK.



## **5.0 CONCLUSIONS**

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Despite Windows 10 not being released until July 29<sup>th</sup> 2015 (at the time of writing) we are encouraged that everything works as expected and with very little to be worried about.

