

vFire Core 9.3.0

Release Notes

Version 1.0

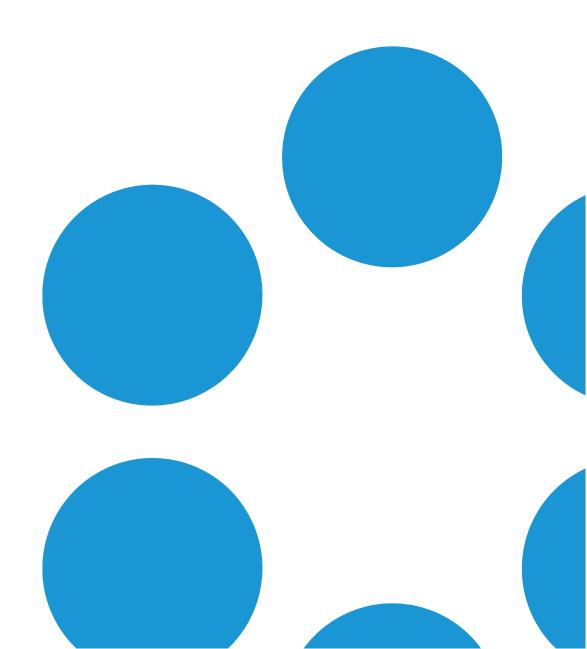




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Version Details for vFire Core 9.3.0 Release

The table below contains version details for this document.

Version No.	Date	Details
1.0	4 March 2016	These release notes document new features and changes in the vFire Core 9.3.0 release.

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About this Document

These release notes contain instruction and information on the features and upgrades which are incorporated in the current release of vFire Core. vFire Core was previously known as VMware Service Manager.

Intended Audience

This document is written for officers and administrators who are responsible for the upgrade and use of vFire Core.

Standards and Conventions

The following standards and conventions are used throughout the document:

	Prerequisites, including security rights and access you may need prior to completing the task. Prerequisites are also highlighted in a shaded box.
	Information related to the current topic that may be of interest/significance to certain users. Notes are also highlighted in a shaded box.
?	Warnings. These are also highlighted in a shaded box.
eg	Examples. These are highlighted in a shaded box.
	Cross references to additional information, such as instruction, which is typically contained within the online help.
Field name	Fields are highlighted in bold text.



Introducing vFire Core 9.3.0

Welcome to vFire Core 9.3.0 from Alemba.

This document describes the features and fixes within this release. It is recommended that you read it prior to installation. vFire Core 9.3.0 is a major release which contains new feature functionality and fixes to known issues.

Installation

For installation instructions, please see the following publications, the latest versions of which are available on our website:

- vFire Core Prerequisites Guide
- vFire Core Installation and Upgrade Guide
- vFire Core Server Console Guide

For documentation, release notes, software updates, or information about Alemba products, licensing and services, visit:

www.alemba.com.



You may need to register to access some of these details.



New Features and Changes in vFire Core 9.3.0

vFire Core 9.3.0 includes the following new features and changes.

Feature	Functionality
New look vFire Customer Portal	The vFire Customer Portal has been refreshed and updated to enhance the user experience. Learn more on page 11.
Design skins for the Customer Portal	System Administrators can now create and update multiple skins for vFire Customer Portal systems, defining the colors, styles, fonts and screen widgets. Learn more on page 12.
My Options menu	System Administrators can now create multiple menu panes for the vFire Customer Portal and assign them to Portal Systems. This includes the creation of new menu items with deep linking URLs. Learn more on page 13.
Enhanced functionality for URLs to the Customer Portal	System Administrators can now create links to the vFire Customer Portal to perform a wide range of actions, such as opening specific submission forms, pre-populating fields and submitting forms. Learn more on page 16.
vFire Customer Portal home page layout	Alternative layouts for the Customer Portal home page are now available that display one or two columns of widgets. Learn more on page 15.
Promoted items in the Service Catalog	System Administrators can now promote service actions and bundles to make them easier for users to find in the Catalog. Learn more on page 17.
Improved category filter in the Service Catalog	The Category filter now displays lower tier categories when users hover over the higher tiers. Learn more on page 18.



Feature	Functionality
Search-as- you-type in fields on the Portal	Enhanced search functionality has been introduced to search fields, offering configurability and search-as-you-type functionality. Learn more on page 19.
Search filters on fields	Filters can be configured for Search Fields in the vFire Customer Portal, limiting the search results to defined conditions. Learn more on page 21.
Collapsible sections in submission forms	Collapsible section functionality has been extended to portal submission screens. Learn more on page 22.
Configurable columns and advanced search	Advanced Search and configurable columns functionality has been extended to the following vFire Core searches: Organizations, Locations, Subscriber Groups, Contracts, Cost Centers, Jurisdictions, Knowledge Admin, Agreements, Bulletin Board Admin. Learn more on page 23.
Patch Tool silent mode	The Patch Tool can be run in silent mode, allowing the upgrade to complete without prompt popups. Learn more on page 24.
Search for tasks using the parent request's Service	In the Task Search 'Select Search Criteria' window in vFire Core, it is now possible to add fields from the Parent Request's Service/Service Action/Service Order number. Learn more on page 26.
Order Service Actions from within vFire Core	Orders for Service Actions can now be submitted from within vFire Core. Learn more on page 25.
Link Closure Reasons to Screen Sets	Call closure reasons can now be linked to Screen Sets. Learn more on page 24.
vFire Core is 64-bit	vFire Core is now a 64-bit application and no longer requires the application pool to be configured with compatibility mode enabled in IIS. For more information and install or upgrade instructions, read the vFire 9.3.0 Installation and Upgrade Guide.



Feature	Functionality
Update to MailBee v10	Update to use Mailbee version 10. To find out more, visit http://www.afterlogic.com/mailbee-net/email-components/features
Portal 'Forgot Password' moved to System Admin	Configuration settings for the password retrieval link, that appears on the vFire Customer Portal login window, have been moved to Customer Portal Settings window within System Admin. Here you can show/hide and relabel the Forgot Password link.



These Release Notes give an overview of the new features. You can find out more about how to use the features by visiting our online user guides at www.alemba.com/help. You must be registered with the site to log in.



New Design Features in the vFire Customer Portal

The vFire Customer Portal has been redesigned to enhance the user experience.

New Look for the Portal

The default font and colors have changed and screen elements, such as widgets, now have rounded edges and pagination functions as appropriate. The summary view for open calls, requests, approvals has been moved to the home screen and are displayed as counts widgets, which are easier to see and use.

Upgraded systems with Portals that were rebranded using Designer functionality will retain any configured logos, colors and fonts wherever possible. Portals that were customized outside of Designer may require the relevant local files to be manually modified to be compatible with the new look vFire Customer Portal.

Configuring your Portal Systems

In addition to the new look, designing and configuring the Portal has been enhanced in vFire Core 9.3.0 to facilitate the extended configuration of Portal Systems. It is now possible for System Administrators to configure multiple Portal Systems each with their own:

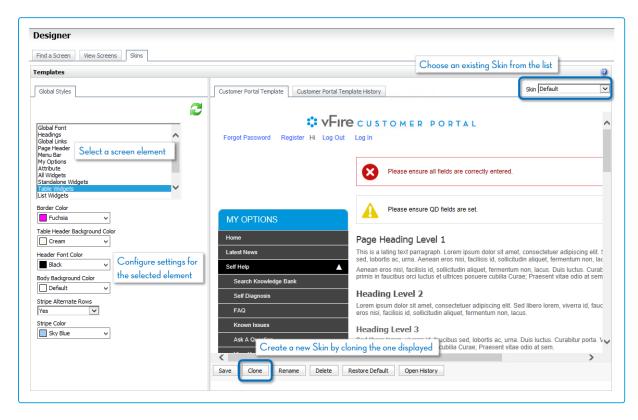
- **Skin**, in which you can choose your own colors, fonts and logos for each customer portal system. You can update out-of-the-box skins, or create your own
- My Options menu, allowing you to add, remove, reorder, and group menu items, as well as create custom ones
- Home Page layout. You can choose from two styles of home page:
 - Default a new layout introduced in 9.3.0 with two columns of widgets
 - Classic reflects the pre-9.3.0 layout with a single column of widgets



Skins

The appearance and branding of the vFire Customer Portal user interface is now controlled using **skins**. Within the skin, you can change the logo, global fonts, colors and the appearance of widgets, tables, buttons and attributes. vFire Core comes with two skins, Default and Classic. You can modify these skins, or create further skins, which you can apply to different customer portal systems.

For upgrading systems, if your vFire Customer Portal was rebranded pre-9.3.0, this will be preserved as a skin.



Skins are managed and configured in the Skins tab of the Designer.

Apply skins to customer portal systems in the **Customer Portal Systems** window in **System Administration**.



See Using Skins in the Portal in the online help for more information.



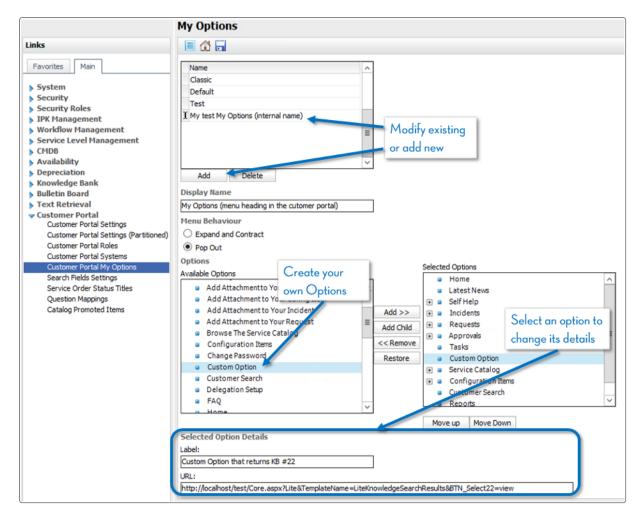
My Options Menu

vFire Core comes with two standard menu panes, Default and Classic. You can create multiple My Options menus to provide a unique menu pane per portal system, changing the contents, order and grouping of menu items. You can also create your own menu items and configure them with URLs defined to access external sites or perform functions within the portal.

Customer Portal URLs can be defined to perform actions including the population and submission of service order/call/request forms, returning search results based on defined parameters, and the population of extension fields as well as standard fields. Refer to **Enhanced Customer Portal URL Functionality** on page 16, to find out more.

For upgrading systems, if the menu pane for the default portal system was modified pre-9.3.0, this is preserved as the **Default** My Option. If you created additional portal systems, their menu configurations are preserved as additional My Options - one per additional system. All settings are preserved on upgrade.





My Options menus are managed and configured in the **My Options** window in **System Administration**.

Apply My Options to customer portal systems in the **Customer Portal Systems** window in **System Administration**.



See My Options in the online help for more information.



Home Page Layout

Choose from two Home Page layouts for each of your customer portal systems:

• **Default** - a layout introduced in 9.3.0 with two columns of widgets. Widget heights are fixed with a pagination function to view more records. This layout is automatically selected.



• **Classic** - reflects the pre-9.3.0 layout with a single column of widgets. Widget heights dynamically expand according to the number of records.



Choose the Home Page layout you want for your customer portal system(s) in the **Customer Portal Systems** window in **System Administration**.





See Customer Portal Systems in the online help for more information.

Enhanced Customer Portal URL Functionality

The vFire Customer Portal's capacity to process user-defined URLs has been extended. Actions which can now be automated through a URL include the population and submission of service order/call/request forms, returning search results based on defined parameters, and the population of extension fields as well as standard fields.



All actions are limited to permissions defined through System Administration configuration settings, and the permissions granted to individual users through their assigned roles. Only links to actions that the customer can perform will be processed successfully.



For a list of URLs valid for use in vFire Core and the Customer Portal, refer to **URLs** and **Access Parameters** in the online help.

System Administrators can easily create and add these URLs to the Customer Portal using **My Options** in **System Administration**.



For information on how to add user-defined URLs to **My Options**, see **My Options** in the online help.



New Functions in the vFire Customer Portal

vFire Core 9.3.0 introduces new functionality to the vFire Customer Portal to improve use of the service catalog and enhance submission forms and the fields they contain.

Service Catalog Enhancements:

- **Promoted Items** system administrators can promote service actions and bundles to make them easier for users to find in the Catalog
- Category Filter this drop down has been redesigned to show lower tier categories by hovering over the higher tiers

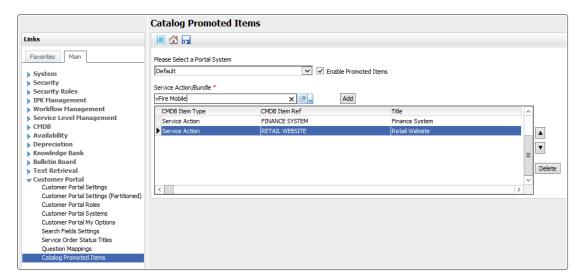
New configurable features:

- **Search Fields** enhanced with search-as-you-type functionality and configurable search behavior
- **Search Filters** filters for Search Fields, limiting the search results to the conditions defined in the filter
- Collapsible sections this functionality has been extended to portal submission and review screens

Promoted Items in the Service Catalog

Service Actions and Service Bundles can be promoted in the vFire Customer Portal so that they are automatically displayed to users when they initially browse the Service Catalog. Once the user runs a search in the Service Catalog those promoted items will be replaced by items matching the user's search criteria. Use this new function if you have a large number of service actions and bundles in your service catalog and you want a select few to appear on the home page of the service catalog, making the process of finding popular items easier for users.





Promoted items are configured in the **Catalog Promoted Items** window in **System Administration**.



See Catalog Promoted Items in the online help for more information.

Service Catalog Category Filter

The Service Catalog filtering functionality has been enhanced in the Customer Portal. You can now view the lower levels of portal display categories before making a selection.



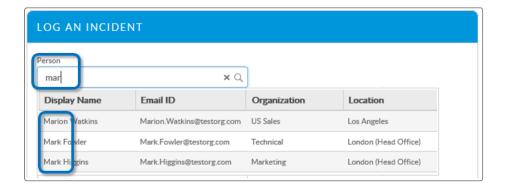


Navigation has also improved, with a clickable trail of subcategories which you can use to navigate up from lower levels.



Search Fields

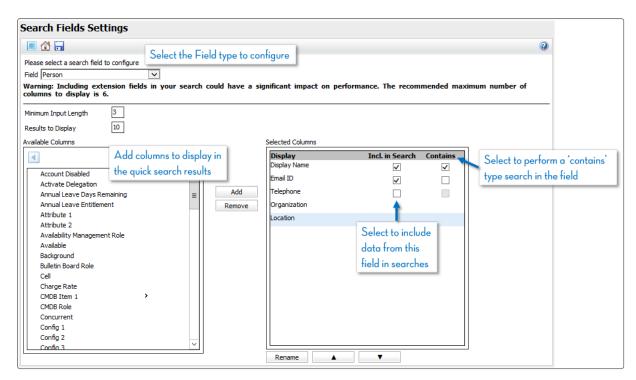
Enhanced search functionality has been introduced to search fields in the vFire Customer Portal. These fields now perform a search as you type, presenting matching results which adjust as you continue typing in the field. Search fields are entity fields such as Person, Location, Service, and so on. They can be configured, allowing you to specify which columns from the entity to display in the results popup, which columns to search within for matching values, whether to perform a 'starts with' or 'contains' type search, how many characters must be typed before the results are displayed, and how many results to show at one time.



These fields are enabled and configured in the **Search Field Settings** window in **System Administration**.

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See **Search Field Settings** in the online help for more information.



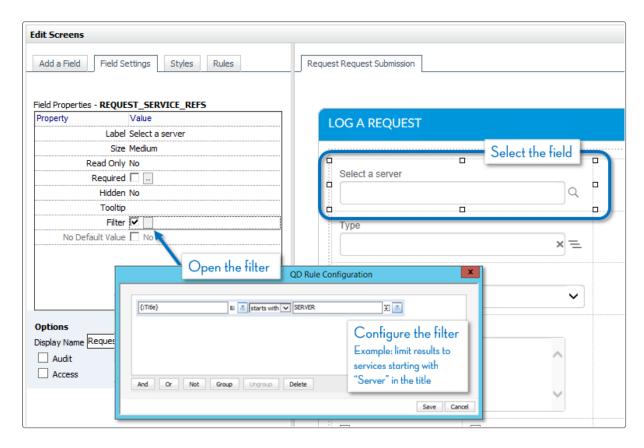
Filters for Search Fields on Submission Forms

Filters can now be applied to search fields on portal submission screens, limiting the search results to the conditions defined in the filter.



Filters do not bypass customer portal security role settings, therefore when a search is performed on a field that has a filter applied, both the filter and the customer portal role permissions affect the results.

Search filters are only available for entity fields such as Person, Location, Service, and so on (also known as Search Fields or QD fields) on portal submission screens.



Filters are configured using **Designer** in vFire Core.

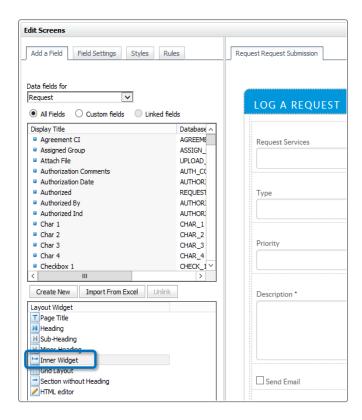


See **Setting Field Properties** in the online help for more information.



Collapsible Sections for Portal Screens

From 9.3.0, inner widgets can be used to create **Collapsible Sections** on portal submission and review screens in the vFire Customer Portal. These are similar to those used on Details screens in vFire Core. Collapsible sections enable you to divide a screen up for readability, grouping related fields inside a box with a border, and can be styled to match other widgets in the vFire Customer Portal. Inner widgets can also be nested. Users can expand or contract the widget as required.



Collapsible Sections and other layout widgets are applied to screens using **Designer** in vFire Core.



See **Configuring Screens** in the online help for more information.



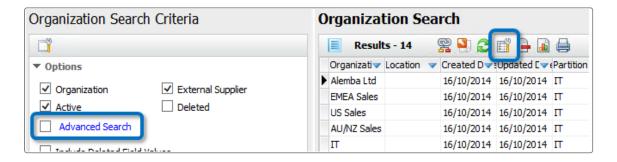
New Features and Enhancements within vFire Core

The release of version 9.3.0 introduces new functionality and enhancements to vFire Core, including:

- Configurable Columns and Advanced Search functionality has been extended to all search windows
- Patch Tool can be run in silent mode, allowing the upgrade to complete without prompt popups
- Call Closure Reasons can now be linked to either Screen Sets or Types
- Task Search Criteria can now include fields from the Service attached to parent requests
- Service Actions can be ordered from within vFire Core, as well as the vFire Customer Portal

Configurable Columns and Advanced Search on Search Windows

Advanced Search and configurable columns functionality has been extended to all search windows in vFire Core. As of 9.3.0 you can add custom fields to your search results window, and run advanced search criteria, on the following search windows: Organizations, Locations, Subscriber Groups, Contracts, Cost Centers, Jurisdictions, Knowledge Admin, Agreements, Bulletin Administration.



With this enhancement, security role permissions have also been made more consistent. To enable Advanced Search, select the Advanced Search checkbox in the relevant security role.



For example, to enable advanced search on the Knowledge Search window, select the Showledge Admin Advanced Search checkbox in Knowledge Security Role(s) in the Security Roles section of System Admin.

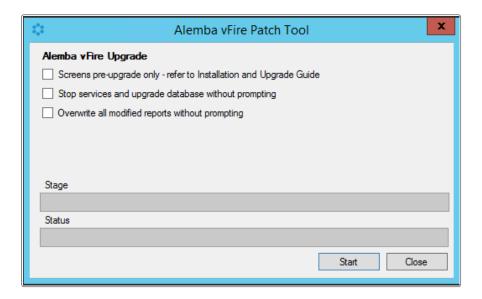




When upgrading to 9.3.0, the system standard **All** security roles do not have this new functionality automatically enabled.

Running the Patch Tool in Silent Mode

Two new check boxes have been added to the Patch Tool giving the option of completing the upgrade without any prompts.



To find out more about upgrading and installing, see the **vFire Core Install and Upgrade Guide**.

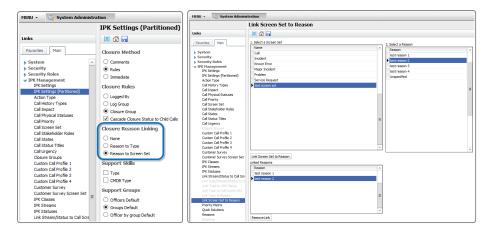
Closure Reasons Linkable to Screen Sets

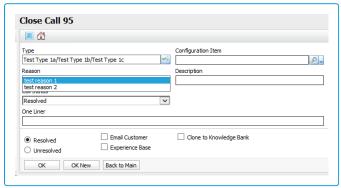
Call Closure Reasons can now be linked to either Screen Sets or Types. When reasons are linked to screen set, only those reasons associated with a particular screen set are available from the drop down list on the **Reasons** field on the call closure screen. The system administrator must enable the linking in **System Administration** by selecting the linking type option **Reason to Screen Set** in IPK Settings (Partitioned) window, and then configuring links between screen sets and reasons in the Link Screen Set to Reason window.



Reason to Screen Set linking is limited to vFire Core and does not extend to call closure through HTML Only, API, or the Connectors.







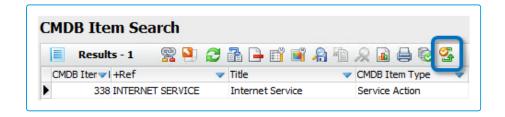


See Configuring IPK Settings and Link Screen Set to Reasons in the online help for more information.

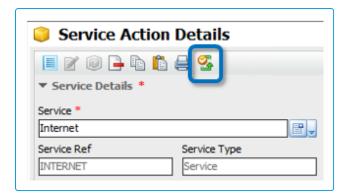
Ordering Service Actions within vFire Core

Officers can now order service actions on behalf of customers through vFire Core.

A button now appears in the toolbar of the CMDB Search results and Service Action Details windows.







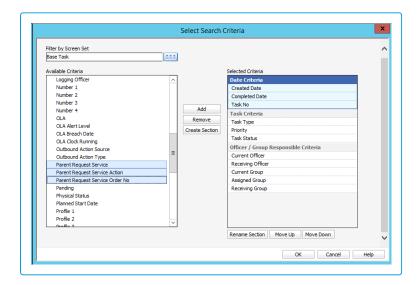
When selected, the appropriate request/call logging screen is displayed, from which the Officer can order one or multiple quantities of the same service action, depending on the service action and security role permissions.



See **Ordering Service Actions within vFire Core** in the online help for more information.

Parent Request data in a Task Search

From 9.3.0, you can use parent request information in the search criteria when searching for tasks by configuring your search options and selecting any or all of the following fields: the Parent Request Service, Parent Request Service Action, Parent Request Service Order No.



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See Configuring Search Criteria in the online help for more information.



Changes to Supported Platforms in vFire Core 9.3.0

This section outlines changes to supported versions of third party platforms.



To find out more about the implications for installation and upgrades, refer to the relevant guides.

Platform Support Added

64-bit Windows Servers are a prerequisite.

The vFire Customer Portal is supported on the following browser and operating system combinations.

	Windows Vista	Windows 7	Windows 8.1	Windows 10	Apple Mac
Internet Explorer 9	✓	×	×	×	x
Internet Explorer 11	×	✓	✓	✓	×
Windows Edge	×	×	×	✓	x
Firefox	✓	✓	✓	✓	✓
Chrome	✓	✓	✓	✓	✓
Safari	×	x	×	×	✓

Platform Support Removed

Windows Server 2008 R1 32 bit is no longer supported as an application server.

Internet Explorer 8, 9*, and 10.



Internet Explorer 9 is supported for clients running Windows Vista only.



Fixed Issues in vFire Core 9.3.0

The following table lists problems fixed in this release:

Issue Number (internal ref in brackets)	Functional Area	Short Description	Fixed in Version
12311 (5574)	Designer	Resolved an issue with dynamic forms in the vFire Customer Portal when using Internet Explorer whereby hidden fields were not being unhidden as defined in their Rule conditions in Designer.	9.3.0
14016 (6843)	Customer Portal	Resolved an issue preventing customization of the vFire Customer Portal to display Service information using the default screen template.	9.3.0
14900 (6344)	Designer	In Designer, on Request screens the "Type" field settings do not contain the "Required" option. This has been fixed.	9.3.0
15487 (7278)	Upgrade	Resolved an upgrade error related to Saved Searches: " String or binary data would be truncated."	9.3.0
15884 (6847)	Search	In the vFire Customer Portal 'Review/Past Current Incidents > Your Calls' search now only returns calls for which the logged in user is the customer or officer.	9.3.0
16190 (7326)	Reporting	Exporting reports to Excel in XLSX format no longer results in misaligned columns.	9.3.0
16256 (7288)	Upgrade	Resolved an upgrade error related to workflows: "Conversion failed when converting the varchar value 'REQUEST_NO' to data type int."	9.3.0



Issue Number (internal ref in brackets)	Functional Area	Short Description	Fixed in Version
16319 (7308)	Reporting	Exporting reports to Excel in XLS / XLSX format, that contain a large number of characters, resulted in an error and missing rows and columns. This has been fixed. Note that XLS cell has a limit of 4096 characters and XLSX cell has a limit of 32768 characters. Exported data exceeding those limits will be truncated (this is a known limitation).	9.3.0
16450 (7141)	Event Management	In Event Management, calls were not able to be created from an event mapping that has a default mapping set to 'Take No Action'. This has been fixed.	9.3.0
16476 (7219)	Messaging	API Call Create containing HTML was creating calls with unformatted HTML text in the Actions and Description fields. To enable these calls to accept HTML correctly a registry key has been added. When the system registry key "APIHTMLAsText" is set as "1" then the Description and Action fields accept HTML. The default "0" is for plain text.	9.3.0
16704 (7257)	Designer	Fields with Access Security defined in Designer are no longer exposed to Officers lacking the correct access levels when they use the Copy function on the call/request/CI details window and then paste into Notepad.	9.3.0
16765 (7258)	SLM	The SLA Target Time was incorrect when using SLM Start Tasks in workflow templates to activate the SLA events. This has been fixed.	9.3.0
16941 (7300)	IPK	When an officer (who belongs to an IPK group) logs a call through the Customer Portal to another group, that call was visible to members of their IPK group in Calls Outstanding 'Your Groups Calls' if the 'Forward Internal' checkbox was ticked. This has been fixed.	9.3.0



Issue Number (internal ref in brackets)	Functional Area	Short Description	Fixed in Version
17118 (7373)	Services	Resolved an issue that was causing the vFire services error "Description: The process was terminated due to an unhandled exception. Exception Info: System.Collections.Generic.KeyNotFoundException"	9.3.0
17214 (7414)	Messaging	Resolved an issue whereby if the "Preserve HTML Formatting in History" option is ticked in the Incoming Email Server settings, when a call/request is updated by incoming email, a notification email was not sent to the owning officers/group.	9.3.0
17252 (7416)	Messaging	When the Admin setting "Email update on Note Added" is enabled, the owning officers/group were not receiving a notification email when a note was added to a call/request via incoming email if it contained an attachment.	9.3.0
17563 (7688)	Workflow	Enhancements and fixes to workflow processing to prevent request workflows from stalling.	9.3.0
17784 (7786)	Survey	Resolved an issue that was causing Survey Emails to not be generated.	9.3.0
17830 (8854)	Workflow	In workflows, the New Request Task was not populating field values in the new request as expected. This has been fixed.	9.3.0
18006 (7947)	Designer	In Designer, if a request field is added to a task screen, dynamic rules were not working when configured to read a value from the request field. This has been fixed.	9.3.0
18006 (8871)	Designer	Dynamic rules were not working for request fields on some user created task screen sets. This has been fixed.	9.3.0



Issue Number (internal ref in brackets)	Functional Area	Short Description	Fixed in Version
18129 (8119)	Designer	In Designer, when a Linked Field is added to a screen it was not retaining the Access Security settings from its parent screen. This has been fixed.	9.3.0
17023 16310 (7354)	Wrapper & Controls	The Source value for requests has been made consistent when they're created from pre-creates via the Customer Portal or vFire Core.	9.3.0
18128 18022 (8062)	Reporting	Resolved a Report Designer issue when creating custom reports, that was causing the plain text field to only allow 4 characters in the text box when defining report parameters.	9.3.0
12497 12498 17347 (5662)	Event Management	Resolved an issue causing the event log error "Unable to find Workflow #506707 in the database." Fix also extends to Calls and Tasks.	9.3.0
17215 17613 17702 (7420)	Dashboard	The drill down function in Dashboards was not working under some circumstances. This has been fixed.	9.3.0
n/a (8825)	Indexing	Resolved an error which was filling event logs: Infra.Rules.TextIndexSQLBuilderBlocked.Execute ERROR: (Infra.Services.Core System #1 vFire) Violation of PRIMARY KEY constraint 'IN_IS_WORDS_ PK'. Cannot insert duplicate key in object 'dbo.IN_IS_ WORDS'.	9.3.0
n/a (6481)	API	The WSTester has been updated with the following transactions: WorkflowAuthorizeAsync, WorkflowCreateAsync, WorkflowForwardInternalAsync, and WorkflowUpdateAsync	9.3.0



Issue Number (internal ref in brackets)	Functional Area	Short Description	Fixed in Version
n/a (6747)	Upgrade	Patch Tool was still creating a "\VMware\Service Manager" folder and placing some upgrade related files in it. This has been fixed.	9.3.0
n/a (7298)	Messaging	Truncation of incoming emails was not working for plain text emails when 'Preserve HTML formatting in Call History' is selected in System Admin. This has been fixed. Also improved call/request history consistency when "Preserve HTML Formatting in History", "Attach email as text" and "Attach email as HTML" are selected/deselected.	9.3.0
n/a (7303)	Upgrade	Resolved an issue that was causing database lockout during upgrade when a large amount of data was involved.	9.3.0
n/a (7367)	Search	Saved Searches were lost after upgrading Oracle systems. This has been fixed.	9.3.0
n/a (7368)	Services	Resolved an issue causing the event log error "Unique constraint (TEST.IN_APPLICATION_CACHE_ PK) violated".	9.3.0
n/a (7570)	Config Port	Config Port import was failing with critical error "Input string was not in a correct format" when trying to import a custom field with { or } in the name. This has been fixed.	9.3.0
n/a (7589)	SLM	SLM events were not activating when requests were logged with the "SLM Immediate" checkbox selected. This has been fixed.	9.3.0
n/a (7590)	SLM	On the Workflow Template, in the SLM window, ticking "SLA Immediate" was not being saved unless an SLA was selected. This has been fixed.	9.3.0
n/a (7597)	Designer	Resolved inconsistent behavior between vFire Portal and vFire Core when the Type field is mandatory.	9.3.0



Issue Number (internal ref in brackets)	Functional Area	Short Description	Fixed in Version
n/a (7889)	Knowledge Base	'Directory' type knowledge articles (which are generated from files in the Knowledge directory on the server), now also include .docx files. When performing a Knowledge Search, these knowledge articles now appear in the results.	9.3.0
n/a (8221)	Performance	Removed a redundant database check to improve performance.	9.3.0
n/a (9111)	Config Port	Resolved a problem running Config Port when the Incoming Email setting for Truncation was included.	9.3.0
n/a (9118)	Reporting	Resolved the error "IN_RBVIEWER.Populate.Error = Missing Connection or ConnectionString" which prevented big reports from being generated.	9.3.0

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Environment and System Requirements

Prerequisites are described in the vFire Prerequisites Guide.

Customizations

If you have created customizations, ensure that they are compatible with vFire Core 9.3.0. Apply the customizations **after** installing 9.3.0.

MSI

If you use an MSI for Client Access, you may need to update the MSI package before completing the installation. You can download the MSI package from www.alemba.com.



You will need to register to access this download.

Replicated Databases

If you replicate the database, you must apply any database schema changes and new indexes to all databases.



Further Information

Product Information and Online Support

For release notes, software updates, or information about Alemba products, licensing and services, visit www.alemba.com.

You will also find up-to-date product documentation, training materials and videos at www.alemba.com/help.



You may need to register to access some of these details.

Technical Support

For technical support or other contact details please visit:

www.alemba.com/contact-us

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