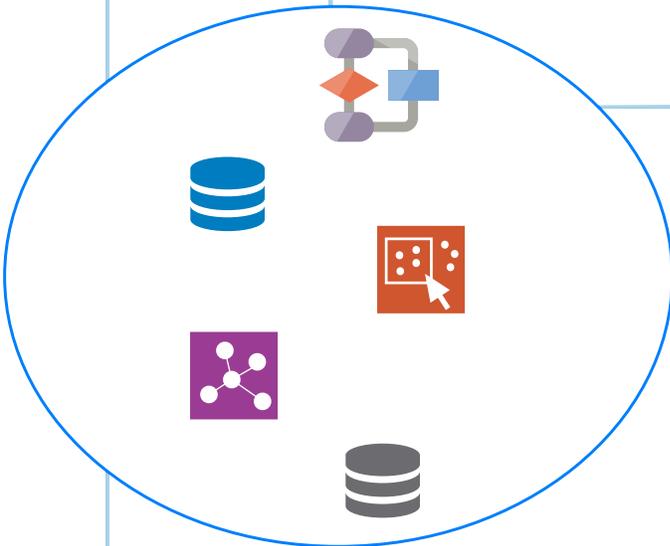
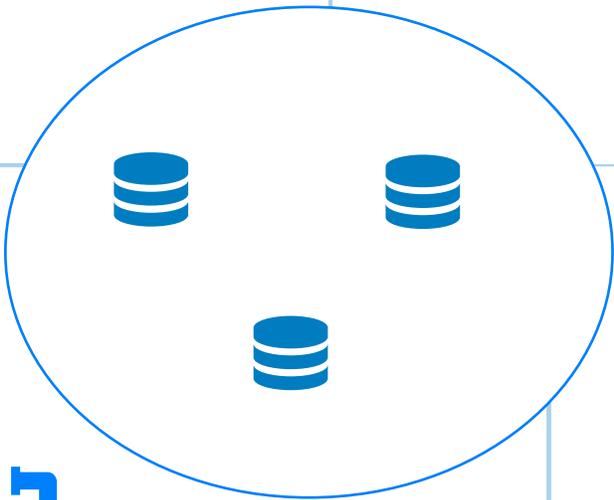




# infogix® Sagacity

Release Notes  
version 2.1

01



## Chapter 1 What's New?

Analysis Changes .....	3
Case Store Nodes in Analysis .....	3
Runtime Parameters .....	3
Specification of Data Store Type .....	3
Changes to New Column Creation in Analysis Sheets .....	3
Security Enhancements .....	3
Role Based Security .....	3
Data Store Improvements .....	4
Store Type Selection for Internal Data Stores .....	4
Index Tab .....	4
Screens Tab .....	4
Code Sets .....	5
Activity Logging .....	5
Owned Data Stores .....	5
Case Management .....	5
Case Store Details .....	5
Case Store Fields .....	6
Case Store Screens .....	6
Case Store Workflows .....	6
Case Store Indexes .....	6
Case Store Other tab .....	6
Case Management UI .....	6
Visualization Changes .....	7
Data Store or Case Store to Dashboard .....	7
Drill to Screen from Dashboard .....	7
Reorganization of Explore Data Menu .....	7
Data Quality .....	7
Profile Data Node .....	7
Consistency Check Node .....	8
Value Conformity Node .....	8
Timeliness Check Node .....	8
Recon Check Node .....	8
On-premises installation and infrastructure improvements .....	8
Support for migrating from previous releases .....	8
Enterprise Installation without Hadoop .....	8
Upgrade to Vertica 8.1 .....	8

# What's New?

The *Infogix Sagacity Release Notes* briefly describes enhancements and modifications included in Infogix Sagacity 2.1. For more detailed and functional descriptions of newly added features, please consult the Infogix Sagacity User Guide version 2.1.

## Analysis Changes

### Case Store Nodes in Analysis

As part of Case Management, a Case Store Input node and a Case Store Output node are now part of the Input/Output palette in Sagacity Analyses. The Case Store Input node allows case records to be manipulated via Analysis, whereas the Case Store Output node enables the user to push new case records into a Case Store.

### Runtime Parameters

The concept of runtime parameters has been added to Analysis Data Store Inputs. Runtime parameters can be added to Data Store Inputs and read by any node in the Analysis, using functions.

### Specification of Data Store Type

The ability to specify Internal or External as a Data Store type has been added to the Data Store Output node. Previously, only Data Stores of the Internal type could be used as Data Store Outputs. Using an External Data Store as a Data Store Output now allows the user to output the Analysis to an external file system or database.

### Changes to New Column Creation in Analysis Sheets

The UI for New Column creation in Analysis Sheets has changed. New Column and Delete Column buttons have been replaced with + icon and Trash can icon buttons. Additionally, an Edit Column button has been added to change New Columns' names. Previously, column rename was preformed via double-click.

## Security Enhancements

### Role Based Security

Sagacity now features role based security per Super Group and Environment. A Super Group's role will now determine which UI elements within a given Environment the Super Group can see.

Any time a user logs in to the system or switches Environments, the system will now reconfigure the UI based on the role definitions for that Environment.

Roles are as follows:

- **Power User:** Will have access to all features

## ■ What's New?

---

- **Case Worker:** Will have access to the Home and Manage Cases areas. If there are Queues defined for a Case Store, then a case worker will be shown only the queues they have permissions to. They will not have access to the Case Store section that shows all Search Screen definitions.
- **Case Manager:** Will have access to the Home and Manage Cases areas. Case Managers will have access to Queues they have permissions to and the Case Store section with all Search Screens.
- **Visualization User:** Will have access to the Home and Explore Data areas.
- **Visualization Consumer:** Will have access to the Home and Explore Data areas. In the Explore Data area, they will not have access to Create Dashboard or the Visualizer but they will have access to view predefined dashboards.

Roles are additive. So, if a user belongs to more than one role, the user will have all of the features available in all of those roles. Users who have system wide administrator permissions are treated like power users irrespective of their role assignments.

Also note that if no role is assigned to a Super Group, users in that Super Group will only see the Home Screen.

## Data Store Improvements

### Store Type Selection for Internal Data Stores

A user may now designate a Store Type for Internal Data Stores. The options are Default, which as before creates a file based Data Store in the Sagacity instance's file system, and Database. In this release, the Database option is intended to support Case Management.

Store Type for Internal Data Stores may be designated upon Data Store creation; or, during the addition of a Data Store Output node to an Analysis, enabling the creation of the Internal Database type on the fly.

### Index Tab

With the addition of Internal Database Data Stores, users can now also create indexes to enhance search speeds when searching these Data Stages. Index creation simply involves selecting a field from the Stage that is used to perform searches.

### Screens Tab

The addition of Internal Database Data Stores has also meant the addition of a Screens Tab to this type of Data Store. The Screens Tab allows the user to define Search screens and View/Edit screens using a form editor, which can then be used by those working with the Data Store. Search Screens are used to query the Internal Database Data Store for specific records, via Case Stores or via the Drill to Screen from Dashboard functionality described below. View/Edit Screens are used to view or edit records that are returned from Search results.

## Code Sets

The use of Code Sets within any type of Data Store is now supported. A Code Set may be used to create a more human readable display value for fields that contain non-human readable codes. Once a Code Set is created, its effects will be seen throughout the system - such as when the field's values are displayed in a Search Screen or a Dashboard.

## Activity Logging

Since the records within an Internal Database Data Store may be edited via an Edit Screen (as described above), Activity Logging has also been added. With Internal Database Data Stores, activity is logged whenever a record is modified. This log of events is accessible within the Internal Database Data Store's View screen(s).

## Owned Data Stores

The addition of Internal Database Data Stores has also required the addition of the concept of an "owned" Data Store. In this release, an owned Data Store is an Internal Database type Data Store that is associated with a Case Store. When such an association exists between these Stages, the Data Store is said to be "owned" by the Case Store. An owned Data Store will also have a number of fields added to it by the system, including: *OwningObjectId*, *OwningSubObjectUID*, *OwningSubObjectID*, and *SysDeleted*. These fields are created to help represent the relationship between the Data Store and its owning Case Store.

## Case Management

With this release, one of the biggest changes has been the addition of Case Management functionality, which allows Power Users to define custom work flows for processing cases and Case Managers/Case Workers to use what Power Users have built to work cases.

This addition has included the creation of a new Data Stage called the Case Store. As mentioned above, Case Management is also aided by the newly introduced Internal Database Data Store.

For this release, the addition of Case Management has included the addition of the following components.

### Case Store Details

The Details Tab lets you define *what type* of Case Store you will be creating. In this release, types include *Case contains record(s) from Data Store(s)* and *Case is not associated with any Record of Stage*.

*Case contains record(s) from Data Store(s)* supports cases that have a header-detail record relationship.

*Case is not associated with any Record of Stage* supports cases that are comprised of header records only.

## ■ What's New?

---

### **Case Store Fields**

The Fields Tab allows users to view all fields that are built into a Case Store and create/edit new fields to hold the contents of header records pushed to the Case Store.

### **Case Store Screens**

The Screens Tab is where those responsible for creating Case Stores build the UI components that allow case workers to interact with cases. When building a Case Store, two types of screens need to be created: Search Screens and View/Edit Screens.

A Search Screen is what a case worker will use to search for a specific case.

View/Edit Screens determine how a case is displayed after a user has found it with a Search Screen and then decided to view/edit it.

### **Case Store Workflows**

The Workflow Tab is where Power Users define the series of *States* and *Queues* a case will *Transition* through as it is processed by Case Managers and Case Workers. The basic drag-and-drop functionality used to build a Workflow is similar to that found in Sagacity Analyses and Process Models; however, each node and even the connectors between nodes have specific functionality that is unique to Case Stores.

### **Case Store Indexes**

As with Internal Database Data Stores, users can also create indexes to enhance search speeds when searching Case Stores. Index creation simply involves selecting a field from the Case Store that is used to perform searches

### **Case Store Other tab**

The Case Store 'Other' tab contains miscellaneous functionality that can be used to perform a number of tasks - some of which are required during the creation of a Case Store.

Functionality includes, but is not limited to:

- Script based background processing
- Retention Processing

### **Case Management UI**

Once Case Stores have been built, Case Workers and Case Managers will be able to access them via Sagacity's Main Menu, listed within the *Manage Cases* option. When a listed Case Store is clicked, the user will be brought to the series of screens that have been built for them to work cases.

A more detailed description of the Case Management UI is available in the Sagacity User Guide.

---

Additional functionality, beyond searching for and working with cases includes but is not limited to:

- Adding notes to a case
- Adding attachments to a case

## Visualization Changes

### Data Store or Case Store to Dashboard

Where previously a user could only create a Dashboard using a Data View, users can now create Dashboards using Internal Database Data Stores or Case Stores.

### Drill to Screen from Dashboard

In addition to being able to Drill To a Dashboard from a Dashboard, users can now drill to specific Search Screens within Internal Database Data Stores or Case Stores. As such, the feature has been changed from *Drill To Dashboard* to *Drill To Stage*.

### Reorganization of Explore Data Menu

Previous editions of Infogix Sagacity have featured an 'Explore Data' menu accessible via the Main Menu. In the past, only the Visualizer and New Dashboard were accessible via Explore Data. With this release, the user will have the ability to add frequently viewed Dashboards to Explore Data, for ease of access.

Additionally, if a user has been assigned the Visualization Consumer role described above, the Dashboards that have been pinned to the Explore Data menu by an administrator are what they will see.

## Data Quality

With this release, a new set of Analysis nodes have been added to the Analysis palette. All of these nodes focus on Data Quality functionality; and, within Sagacity they are referred to as "Check" nodes.

### Profile Data Node

The Profile Data node allows you to gather information about any field in a data set. Using this node generates a sheet with fields containing useful information about each profiled field. Fields generated by the Profile Data node include: *uniqueCount*, *nullsCount*, *emptyCount*, *max*, *min*, and an array field called *values* which contains all unique values for the profiled field with an occurrence count for each value. Custom profiling may also be performed via *Custom Counters*.

### **Consistency Check Node**

The Consistency Check node creates new fields containing Boolean outputs based on whether records satisfy expressions. Previously this type of check had to be done by creating new columns within any Analysis node and using nested IF statements. The Consistency Check node simplifies this type of validation.

### **Value Conformity Node**

The Value Conformity Node is used to check whether data set values match specific values or fall within a range of values. The node produces a new field containing Boolean values for each Value Conformity Check that is written. If a data set value matches any of the values in a Value Conformity Check or falls within the Check's range, a *True* value is returned. Conversely, if a data set value does not match any of the values in a Value Conformity Check or falls outside of the Check's range, a *False* value is returned.

### **Timeliness Check Node**

The Timeliness Check Node is used to check whether the amount of time between two fields surpasses an acceptable level. The node produces a new field containing Boolean values for each Timeliness Check that is written. If the difference between the two chosen fields is less than or equal to the acceptable interval, the record is considered timely and a *True* value is returned. Conversely, if the difference between the two chosen fields is greater than the acceptable interval, the record is not considered timely and a *False* value is returned.

### **Recon Check Node**

The Recon Check Node allows you to reconcile records from up to 4 sources, using a number of different match criteria. Match criteria can come from a list of predefined options or may be customized.

## **On-premises installation and infrastructure improvements**

### **Support for migrating from previous releases**

Migration from enterprise version 2.0 to enterprise version 2.1 is now supported.

### **Enterprise Installation without Hadoop**

The enterprise installation process may now be ran without installing Hadoop. Running such an installation assumes that the customer already has a third party deployment of Hadoop that the system can point to.

### **Upgrade to Vertica 8.1**

The enterprise installation package will now distribute Vertica 8.1. Previously, Vertica 8.0 was distributed.