



Release Notes

Release 2.7





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Overview

This document is intended for Infogix ER customers who upgrade to Release 2.7. Complete instructions on upgrading an existing Infogix ER deployment to Release 2.7 are given in the *Infogix ER 2.7 Upgrade Guide*.

For customers who are installing the product for the first time should follow the instructions in the appropriate *Infogix ER Installation Guide*.

This document describes the enhancements and modifications included in this release and highlights changes that may affect current Infogix ER implementations. This document is not intended as a user manual.

Contacting Customer Support

If you need assistance to upgrade to Release 2.7, call Infogix Customer Support.

- U.S. and Canada: Call us at +1.630.505.1890 or send a fax to +1.630.505.1883. You can also send an email to support@infogix.com.
- Outside of the U.S. and Canada: Infogix, Inc. maintains offices around the world. Check our Web site at www.infogix.com for the closest office or email us at support@infogix.com.



What's New

This section lists new functions and features in Release 2.7.

Window Manager

The Window Manager allows users to easily cycle through open windows. This feature uses the CTRL key, along with the up and down arrows, to select a window for viewing from a list of open windows.

The Window Manager also tracks open windows and allows only a single instance of an object detail window to be open by the user. Within a workspace, the object detail window is brought in focus on an attempt to open a second window. Between workspaces, a message that the window is open in another workspace is displayed to the user.

This behavior is seen in all object detail windows, notes, emails, attachments, and activity windows.

Search for Unowned Objects

This function allows you to run a search on the Recon Entity Search, Match Set Search, Adjustment Search, Entry Search, Cash Difference Search, and Exception Search windows for unowned items.

Cash Differences Definition

With this release of Infogix ER, the Cash Differences Definition is complete and includes the following configuration screens:

- Core Definition
- Model Definition
- User Interface Definition
- CD Summary Definitions
- Process Definition
- Research Limit field
- Status Rule
- Access Rules
- Calculated Field Rules
- Aging Rules

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- Action Availability Rules
 - Action Validation Rules
 - Priority Rule
 - Routing Rule
 - Workflow Rules

Information on configuring these screens is included in the application help topics.

Letter Output Batch Viewer

The Letter Output Batch Viewer allows you to view scheduled, running, and completed letter output jobs. Options also include reprocessing completed or failed batch jobs and starting new batch job processes.

Adjustment Output Batch Viewer

The Adjustment Output Batch Viewer allows you to view scheduled, running, and completed adjustment output jobs. Default search options allow you to search for adjustment output jobs by adjustment type, destination ID, a date range, or status.

Options also include viewing all adjustments included in a particular batch job, reprocessing a completed or failed output batch job, and starting a new batch job process.

Calendar Permission Set

To support additional Infogix products, the Infogix Platform now includes a Calendar permission set composed of the View and Edit permissions.

By default, during deployment a Default Calendar Security Profile is created which governs access to all calendars used in the application. To provide access to calendars for viewing and editing purposes, you must revise existing security profiles to include the Calendar permissions set, and must grant permissions accordingly to allow the needed access to calendars.

Upgrading the Product

There are no major changes to system or installation requirements. Complete instructions on upgrading to Release 2.7 are in the *Infogix ER 2.7 Upgrade Guide*.