Release Notes

Release 2.8

© 2011 Infogix, Inc. All rights reserved.

June 3, 2011

Infogix, the Infogix checkmark logo, Unitech Systems, Inc., Infogix Assure, Infogix Insight, ACR, ACR/Detail, ACR/Summary, ACR/Workbench, ACR/Connector, ACR/Instream, ACR/File, Information Integrity, and Information With Confidence are registered trademarks of Infogix, Inc.

Infogix ACR, Infogix EM, Infogix ER, Infogix Perceive, Infogix Controls, Infogix Nexix, ACR/TransMatch, and The Information Integrity Experts are trademarks of Infogix, Inc.

Any other trademarks or registered trademarks are the property of their respective owners.

Publication Number: 1893

Publication Date: June 3, 2011

© 2011 Infogix, Inc.

All rights reserved.

Confidential—Limited distribution to authorized persons only, pursuant to the terms of Infogix, Inc. (FKA Unitech Systems, Inc.) license agreement. This document is protected as an unpublished work and constitutes a trade secret of Infogix, Inc.

This document and the information contained herein are the property of Infogix, Inc. Reproduction or use in whole or in part of this document and the information contained herein by anyone without prior written consent of Infogix, Inc. is prohibited.

CONTENTS

Overview **4**

Contacting Customer Support **4**

What's New **5**

Account Certification 5

Multi-Object Notes, Email, and Attachments 5

New Installation Configuration 5

Auto-Refresh Feature in the Process Viewer 5

Expanded Matching Rule Options 6

Enhanced Security for User Operations 6

Performance Improvements 7

Other Enhancements 7

Upgrading the Product **7**

Known Issues **8**

Overview

This document is intended for Infogix ER™ customers who upgrade to Release 2.8. Complete instructions on upgrading an existing Infogix ER deployment to this release are given in the *Infogix Upgrade Guide*.

For customers who are installing the product for the first time should follow the instructions in the appropriate 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 2.8, 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 summarizes enhancements for the 2.8 Release.

Account Certification

This release of Infogix ER supports an optional Account Certification process.

Account certification is the systematic and manual review of reconciliation results by qualified and trusted users. This release supports account certification for top-level reconciliations, and includes flexible certification scheduling, customized sign off levels, optional certification grouping, and customizable workflow rules for certifications.

Multi-Object Notes, Email, and Attachments

Release 2.8 now supports the use of multi-object notes, email, and attachments.

Users can select multiple items (reconciliations, cash differences, or adjustments) and add notes, send emails, or attach files to all items in one step instead of having to perform several, individual tasks to accomplish the same thing.

This enables an easier workflow for users and greater efficiency when tasks require working with several objects to resolve a single issue.

New Installation Configuration

Infogix ER, Infogix Assure, Infogix Insight, and Infogix Perceive now share a simplified, common installation configuration. If your previous installation relied on an external job scheduler to execute any Infogix utilities, update the paths for these utilities in your scheduler to reflect their new location. Utilities previously located in the InfogixER/dist-stage/server-util directory are now in the Infogix/server-util/default/ER directory.

The configuration home directory is now Infogix/config. Additional configuration properties files are in Infogix/igx-data.

Auto-Refresh Feature in the Process Viewer

The Reconciliation Process Viewer, accessed via menu options Administration > Monitoring > Reconciliation Process, now has an auto-refresh feature.

The auto-refresh is set to 30 seconds by default. Users can easily change the default time period by modifying the time (in seconds) in the Auto Refresh text box.

Expanded Matching Rule Options

With this release, the Matching Rules that govern how users manually match open reconciliation items have expanded matching options. Previously, rule choices for manual matches were Many to One, One to Many, One to One, or Many to Many. Added options are Zero to Many, Many to Zero, and Any to Any.

The choices for the Matching Rule are now:

- One to One – Requires a match of one item on the left side and one item on the right side.
- One Left Many Right – Requires a match of one item on the left and at least one item on the right.
- Left Many One Right – Requires a match of at least one item on the left and one item on the right.
- Many to Many – Requires a match of at least one item on the left and one item on the right.
- Zero to Many – Requires a match of zero items on the left side and two or more items on the right side.
- Many to Zero – Requires a match of two or more items on the left side and zero items on the right side.
- Any to Any – Requires a match of zero or more on both left and right sides.

Enhanced Security for User Operations

With this release, you can apply additional security for some user operations at the top-level reconciliation level; configurability at a sub-recon level is not currently supported.

The reconciliation configuration file now includes properties to specify a list of operations that will be excluded from user visibility and use. The exclusion applies to all users that have visibility into that reconciliation and all related sub-reconciliations.

Any modifications to the security properties require a redeployment of the application. After redeployment, the user interface hides buttons for excluded operations on all screens that perform those operations. For example,

excluding the Close operation hides the Close button on the Item Search, Item Detail, and Recon Entity Detail windows.

Performance Improvements

Several performance improvements have been made with this release, including:

- Streamlined Start of Day (SOD) procedures that result in faster processing times for reconciliations that do not use Priority Rules.
- Parallel processing for certain tasks in both SOD and EOD (End of Day) can be enabled. In SOD for the aging and routing processes, items can be broken down into smaller work sets and processing run concurrently both locally and across a cluster. In EOD, database concurrency can be optionally enabled by configuring run-time properties to allow parallel processing of snapshot tasks.
- Administrators now have the ability to control database statistics on historical data and during intra-day processing, providing faster database processing.
- For reconciliations running on Oracle systems, improvements were made to use Intelligent Stats Management to allow the discovery of stale statistics that need updating. The Infogix ER database user must be granted the ANALYZE ANY permission to make use of this performance improvement.

Other Enhancements

Additional application enhancements and performance improvements include:

- Enhanced performance and handling of operations containing over 1000 items.
- Improved export to Microsoft® Excel® functionality when a result table has had columns or rows re-ordered, and after client side sorting.

Upgrading the Product

In addition to the simplified, common installation configuration, this release also includes a new upgrade procedure. This procedure uses improved utility scripts and a new directory structure. Refer to the *Infogix Upgrade Guide* for details on upgrading your application.

Known Issues

This section describes any known issues.

- Excel exports are limited to 32,767 rows. (3468)
- Excel exports can contain fields which are not correctly translated when exported, resulting in the raw database value being displayed instead of the user interface translated value. (3471)
- Attempting to add a large (over 3990 characters) in line note on an Item in a Recon Entity Detail window results in a #RECON102: Error updating dynamic entity. Use the note function instead as a work around to this issue. (3973)
- Changes made to a User Profile are lost if you click Refresh before saving the profile. (3497)
- In some cases after an application time out, the work spaces are not available on logging back into the application. (3706)
- Once an Item moves to History, View Object opens up and empty screen. (3918)
- In a Item Summary Definition, not specifying a non-null value for all fields used in grouping can result in an incorrect result when drilling down from aggregate results. (3805)
- Notes on items contained in the most recent recon entity history do not save correctly. (3666)
- Updating any fields or changing the status of an object immediately after adding a note results in an out of date exception. (3661)
- Adding an attachment to an extremely long email (approximately 4000 characters) distorts the email window. (3715)
- In cases where there are NULL values, the cash differences and item summary windows may display the wrong results after drilling down from an aggregate result. The workaround it to ensure that fields used in aggregates do not contain NULL values. (3805)
- The Adjustments workflow action “Set Fields By Lookup Mark Field Valid/Invalid” is not persisted after an adjustment is saved, then re-opened. (3806)
- Priority fields are not available in Routing Rule condition field list. The workaround is to manually enter the complete field name in the rule. (4000)