



Release Notes | Release 4.0



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Overview

This document is intended for Infogix ER® customers who upgrade to Release 4.0. Follow the instructions in the appropriate *Infogix Server Upgrade Guide* to install the new release.

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

Contacting Customer Support

If you need assistance, contact Infogix Customer Support.

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What's New

This section summarizes the enhancements for the Infogix ER 4.0 release.

Productivity Enhancements

Enhancements to Favorite Search Feature

The previous release of Infogix ER allowed a user to save and recall search criteria based on the user's login. The user could select the search criteria and arrange the results columns. When the user ran the recalled search, the search results displayed with the columns arranged.

The favorite search feature has been enhanced. A user can now save more than one favorite search, create and save searches by name, save changes to a search, rename a search, and delete a search. Result columns can also be arranged and sized. A user can view a list of favorite searches and select a



favorite search to run. Search names are a maximum of 40 alphanumeric characters.

The number of searches that a user can save is configurable in the `UI_MAX_SAVED_SEARCHES` property in the `ER.properties` file.

If the user had a saved search in Release 3.1, the search displays in the Favorites list in Release 4.0 as Default.

Before upgrading to Release 4.0, be sure to apply all relevant patches. **Infogix ER 3.1 Patch ER-31183-3** must be applied before upgrading to Release 4.0 to ensure that the Favorite Search feature works properly in Release 4.0. Contact Customer Support if you need assistance.

Remove Favorite Searches Created by Users No Longer in System

The command line utility `favoritesearchcleanup` has been added to allow an administrator to clean up favorite searches created by users who are no longer valid users in the system. More information about the utility and syntax is available in the *Infogix ER Administrator's Guide*.

Search Text Fields Using a Negative Match Operator

Previously, text field searches were all implicit "equal" type matches making it difficult to search for items not matching a field value. A negative match operator can now be used in text search fields and is supported for reconciliation, adjustment, and cash difference searches.

Customers can enter an exclamation point (!) at the start of a search value to search for negative matches. For example, enter `!AL001` in the Branch Code search field to return all branch codes that are not AL001. Combining the exclamation point (!) with an asterisk (*) will result in a negative wildcard search. For example, if Zip Code is defined as a text data field, you can enter `!600*` in the Zip Code search field to return all zip codes that do not start with 600.

Production Mode Configuration

ER operators can mistakenly delete all recon instances from the production system. This causes a massive data loss and very extensive recovery efforts. To prevent this mistake, the `ER.properties` `PRODUCTION_MODE` property is set to true by default for a more restrictive operational mode.

If the option is changed, a redeploy and restart of the client is required.

If a rollback is performed in production mode, a warning is provided.



When the option is enabled, the following restrictions are applied across the Infogix ER application and its users:

- The title bar of the Infogix ER Client GUI interface will contain text to indicate production mode, for example, Infogix ER PRODUCTION.
- Under Administration > Monitoring > Reconciliation Processes > Current Instances tab > Rollback, the system displays a warning message that the user is performing the rollback in production and asks if the user wants to continue.
- Under Administration > Monitoring > Reconciliation Processes > All Instances tab, the Delete All button is disabled. If a user invokes this operation by mistake, the server will log an error with the user's ID.
- Under Administration > Management > Reconciliation Definitions > More, the Delete option is disabled. If a user invokes this operation by mistake, the server will log an error with the user's ID.
- Under Administration > Management > Adjustment Definitions > More, the Delete option is disabled. If a user invokes this operation by mistake, the server will log an error with the user's ID.
- The -clearData option for the command line utilities adjcontrol and reconprocesscontrol is disabled.
- The -purgeAllData option for the command line utility cdpurgingmanagement is disabled.

Email Notification for Reconciliation Process Failure

Notification when a reconciliation process fails in a production system has been improved. Customers can receive email notifications from the system containing relevant error information. The customer can use this information to fix the issue or contact Infogix Customer Support with the information.

In the ER.properties file, properties can be configured to send a notification email to customer email addresses when recon processes fail. The subject of the email contains the recon definition name and the recon process that failed. The body of the email contains the time, error message, and stack trace of the error. Optionally, the server log file can be attached to the email in a zipped format.

Customers who want messages delivered to a pager device can have their email addresses specified in the EMAIL_NOTIFICATION_SM_ADDRESSES property. The subject and the body of the message are limited to 120 characters or less. Exception stack traces are not included in the message and no server log files are attached.



Email notifications will not be sent if the reconciliation process hangs or there is a server or system wide failure, for example, server out of memory, server crash, or network outage.

Duplicate Current Reconciliation Items

Current reconciliation items can be duplicated as a quick way to create similar items in the current Recon instance. Duplicating items avoids manual entry effort and errors.

On the Recon Item Search screen, a current recon item with any status can be duplicated. All the Model Definition attributes for the recon item are duplicated except for the Match Set Attributes. The new item can be edited and is saved with an "Open" status.

When you save the item, the system applies the same rules to the appropriate fields as it does when saving a new item. For example, the system will apply aging rules to the age field to determine the item's age.

The system generates a distinct Activity Log entry that records that the item is duplicated from current and includes the Item UUID of the current item.

To help auditors search for items that were duplicated, the administrator can configure two properties in the reconciliation.properties file.

- The DUPLICATION_INDICATOR property identifies the field that was added to the Item table in the Model Definition.
- The DUPLICATION_INDICATOR_VALUE property specifies the value that the system will automatically populate in the field specified in the DUPLICATION_INDICATOR property and will append the current item's UUID.

Note: When the field specified in the DUPLICATION_INDICATOR property is added to the Item table, an error will result if the size the field is not large enough to accommodate the "duplication indicator value" and the UUID that will be appended.

The "duplication indicator" field can be added to detail and search screens.

Duplicate Reconciliation Items from History

Reconcilers sometimes find (often many days later) that recon items were matched or closed by mistake. To manually re-enter the item so it can be matched with new items that just came into the system is cumbersome and error prone. A wrongly matched or closed by mistake item in history can be duplicated instead which saves time and avoids manual entry effort and errors.



On the Recon Item Search screen, a history recon item with a “Matched” or “Closed” status can be duplicated. All the Model Definition attributes for the history recon item are duplicated except for the Match Set Attributes. The new item can be edited and is saved with an “Open” status.

When duplicating a recon item from history, there are restrictions.

- The associated Recon Entity for the item in history must exist in the current Recon instance.
- Only “Matched” or “Closed” items can be duplicated.
- History items can only be duplicated one at a time.

When you save the duplicated history item, the system applies the same rules to the appropriate fields as it does when saving a new item. For example, the system will apply aging rules to the age field to determine the item’s age.

The system generates a distinct Activity Log entry that records that the item is duplicated from history and includes the Item UUID of the historical item.

To help auditors search for items that were duplicated, the administrator can configure two properties in the reconciliation.properties file.

- The DUPLICATION_INDICATOR property identifies the field that was added to the Item table in the Model Definition.
- The DUPLICATION_INDICATOR_VALUE property specifies the value that the system will automatically populate in the field specified in the DUPLICATION_INDICATOR property and will append the history item’s UUID.

Note: When the field specified in the DUPLICATION_INDICATOR property is added to the Item table, an error will result if the size the field is not large enough to accommodate the “duplication indicator value” and the UUID that will be appended.

The “duplication indicator” field can be added to detail and search screens.

Duplicate Items in a History Match Set

You can duplicate items in a history match set when the match set status is “Matched” or “Confirmed”. Being able to duplicate items in a history match set to a current Recon instance saves time and avoids manual entry effort and errors.

The duplicated match set items are copied to the current Recon instance. The associated Recon Entity for the history match set items must exist in the current Recon instance. All the Model Definition attributes are duplicated



except for the Match Set Attributes. The new items can be edited and are saved with an “Open” status.

When you save the items, the system applies the same rules to the appropriate fields as it does when saving a new item. For example, the system will apply aging rules to the age field to determine the item’s age.

To help auditors search for items that were duplicated, the administrator can configure two properties in the reconciliation.properties file.

- The DUPLICATION_INDICATOR property identifies the field that was added to the Item table in the Model Definition.
- The DUPLICATION_INDICATOR_VALUE property specifies the value that the system will automatically populate in the field specified in the DUPLICATION_INDICATOR property and will append the history item’s UUID.

Note: When the field specified in the DUPLICATION_INDICATOR property is added to the Item table, an error will result if the size the field is not large enough to accommodate the “duplication indicator value” and the UUID that will be appended.

The “duplication indicator” field can be added to detail and search screens.

Control When Components Can Be Imported

Components can be exported from one environment, such as QA or Testing, and imported into another environment, such as Production. To control whether an exported ER component can be imported into a particular environment, Rule Release Control parameters have been added to the ER.properties file.

When the Rule Release Control parameters are configured, a release tag is applied to exported rules and rules must have an acceptable release tag to be imported. Refer to the *Infogix Properties Guide* for more information about the parameters.

Rules Catalog Added

A Rules Catalog has been added which enables a user to search for specific rule types by entering a text string search pattern. The search results table displays the rules that match the rule type and search pattern. The search results table can be customized for each rule type.

From the search results table, a user can view a rule in the appropriate Adjustment or Reconciliation definition. A user can also use drag-and-drop to copy rules from the search results table to similar rule types in other reconciliation and adjustment definitions.



For this release, the rule types a user can search for are Reconciliation Routing Rules and Adjustment Approval Rules.

Testing of Adjustment Workflow Rules

Users are able to test an Adjustment Workflow Rule for an expected result which will make rule writing easier to troubleshoot. An Adjustment Workflow Rule can be tested by specifying input data and the expected rule results. The rule is then tested to see if the expected results are achieved.

Additional Authority for Adjustment Events

Additional authority provides rule-based control for approval of adjustments. This is additional security that is flexible and can be configured to meet business requirements.

Two new workflow events for adjustment approval were added: Pre-Take Adjustment and Pre-Assign Adjustment. These events check a user's profile and adjustment data to determine if the user has the additional authority needed to take or be assigned the adjustment. The Approve Adjustment event can also require the user to have additional authority to approve an adjustment.

If the user does not have the additional authority required, a workflow action can display an error message to explain that the user does not have the authority.

Supplemental Validation Rules Added

When users manually enter data while creating an adjustment, errors can occur. The ability to validate data fields changed by users when making adjustments from cash difference helps to eliminate errors.

A Supplemental Validation Rules stack tab has been added to the Adjustment Definitions to apply validation rules against supplemental data. The Supplemental Validation Rules are applied to user-defined fields in the Supplemental Data Model. The Supplemental Data Validation Rules execute and set the applicability of supplemental data fields in an adjustment entry. The rules are optional but if no rules are defined the supplemental data entered is not validated.

With the addition of Supplemental Validation Rules, the expected behavior of the Supplemental Data icons that display in the Adjustment panel has changed.

	Supplemental Data Complete icon - When an item is added to the Adjustment panel, the icon displays indicating that supplemental data for the item is complete, is not required, or has not yet been evaluated. This icon can change after the supplemental data is evaluated and validated.
	Error icon - Indicates that supplemental data is incomplete or incorrect. Hover over the icon for a description of the error or errors. The icon changes to the Supplemental Data Complete icon when the errors are resolved.

Duplicate an Adjustment Definition

In Infogix ER 4.0, the ability to make a duplicate copy of an adjustment definition and change desired fields has been added. Being able to duplicate an adjustment will help with faster implementations, easier usage, and quicker deployment of controls.

A duplicated adjustment definition is not an exact copy of the original adjustment. The following changes occur when an adjustment is duplicated:

- The Name and ID are appended with "_COPY". The Name and ID can be changed before the duplicate is saved.
- The Model Definition table names are reset based on the new ID.
- The Output File and Done File on the Output Destinations tab on the Output Rules stack tab are not duplicated and are blank.

New Teller Window Fields Are Configurable

In Infogix ER 4.0, the fields on the New Teller window are configurable on the Cash Differences User Interface Teller Detail Tab. System-generated and user-defined fields can be added on the Teller Detail tab from the Teller table. The Teller Information Group and Additional Teller Information Group fields display on the New Teller window.

Enhancement to Revert Owner Back to Previous Owner

In Infogix ER 4.0, if a user removes an item from an adjustment, the owner status of the item returns to the previous owner and is no longer associated with the owner who returned the item. The enhancement improves



productivity because manual intervention is no longer needed to change the owner.

If the current owner removes items from the adjustment panel but does not have permission to assign items, an error message is displayed and ownership does not revert to the previous owner.

Enhancement to Workflow Adjustments

This enhancement now allows customers to set up default Adjustment Entry values through workflow rules and custom Web Service look ups before the entry is edited or validated. This was previously not possible with adjustment mapping rules or other workflow events which are only triggered on editing.

The workflow event Post-Add Adjustment Entry is triggered when an Adjustment entry is added manually. The event supports all available Adjustment workflow actions, including the “Set Fields By Web Service” action. (ER-4695)

Performance Enhancements

Purge Inactive Tellers Only After Associated Cash Differences (CDs) Purged

The previous Teller purge process did not check if inactive tellers still had CDs associated to them. The data model does not allow a teller to be purged if CDs were referencing that teller and this conflict caused purge failures.

A check has been added to the Teller purge process so inactive tellers with CDs will only be purged after the associated CDs have been purged. (IGX-2112 and ER-4886)

Previous Value Column Correctly Displays Queue

When an adjustment is taken from a queue, the queue name displays correctly in the Previous Value field in the audit log. (ER-4691)

Resolved Potential Lock-Up When Saving Cash Differences

Functionality was improved to prevent a potential lock-up when saving Cash Differences after a note is added. (IGX-2379)

Ability to Purge Recon Data in Parallel (supported for Oracle 11g)

In previous Infogix ER releases, the Recon data purge process is sequential and the total purge time is cumulative for the Recon types.

This enhancement allows a parallel purge option to improve performance and scalability of the Recon data purge. If parallel purge is configured, the system will purge Recon data in parallel based on the model recon type, for example, data belonging to different top level Recons will be purged concurrently. (ER-4914)

The parallel purge option is enabled by changing the following two configuration items in the reconciliation.properties file.

Infogix Reconciliation Properties	Description
ENABLE_PARALLEL_PURGE	Set to true to enable parallel processing for Recon data purge.
NUM_PARALLEL_PURGE_THREADS	Specify the number of parallel purge threads. This number matches the number of top level recon types that need to be purged. The default value is 8.

When a parallel purge is run, the following statement is logged to the server logs:

“...Purging X Recon Types using Y threads”

Resolved Potential Error when a Cross Recon Triggers a Recon Entity Recalculation

Functionality was improved to avoid a potential process failure when a cross recon process triggers a recon entity recalculation. The cross recon now uses the expected recon entity data model for any recalculation with user defined aggregate fields. (ER-4928)

Arrows Can Scroll through Dates in Adjustment Calendar

A fix was made to ensure arrows can be used to scroll through the dates in the Adjustment entry level calendar component. (IGX-2463 and ER-4897)

Favorite Search Issues Corrected

When a favorite search for an aging report is saved, the favorite search only displays for the aging report for which it was created. (IGX-2641, ER-5039)

Favorite searches correctly display the search results formatting for user-defined fields and fields populated via web services. (IGX-2581, ER-4987)



Technology Upgrades and Enhancements

Synthetica/JIDA Upgrade

Synthetica/JIDA has been upgraded. This upgrade was necessary for compatibility with JAVA but it also provides the added benefit of updating the look and feel of the Infogix ER User Interface.

Reduce Memory Usage for Current Prep Process

The current prep process reads admin data from an external database table and the table and data read could be very large. To reduce memory usage, the ER code will no longer use scrollable JDBC result set to select admin data. (ER-5099)

Memory Management Improved for Groovy Rules Execution

ER rules expression implementation uses the Groovy language and run-time. ER code changes were made to expedite the release of Groovy script objects from its caches to curtail the memory growth associated with them. (ER-5098)

Improved Error Message for Missing Attribute in Recon Entity

It is possible for the Recon Entity model attributes and the Field Mapping Rule to be out of sync. For example, this can occur when model attributes are removed. The run-time error message when this happens has been improved to include the name of the missing attribute. (ER-5037)

Improved Logging of Recon Rollback Process Failure

ER will now clearly log rollback process failure and success. For example, if a rollback process fails due to an unexpected error in cancelling Adjustments, the failure will be logged in the ER log. In the log the message will read "Rollback failed for ...<reconId>". (ER-4995)

Platform Improvements

For a complete list of supported software and hardware versions, see http://www.infogix.com/docs/techspecs_commoninstaller.pdf.



Software Supported

- The OpenDS LDAP directory, version 2.3, is now supported.
- SQL Server® 2012 is now supported.

Infogix Administrative Console

Several enhancements were made to the Infogix administrative console for this release. The console enables users to gather and provide information to Infogix Customer Support for use in troubleshooting run-time problems. This feature reduces dependency on third-party services, which add time and cost.

- **Thread and Heap Dumps**—Previously, thread and heap dumps were generated from the same screen. The two features are now separate features on the menu and each has its own screen. The functionality has not changed.
- **SQL Console**—The SQL console is a new feature for this release. This feature enables a customer to execute an SQL SELECT statement and export the results to a CSV file.

Typically, the services of a DBA are required to execute an SQL query. Now, Infogix Customer Support can provide the select statement to the customer, the customer can execute the statement, and the customer can then send the exported results to support personnel.

The SQL console limits the number of generated results to 1000. Additional results that meet the requirements are not displayed in the console.

The following security features have been implemented. First, the SQL console does not support the manipulation of data. Only SELECT statements can be executed. Second, the SQL console is enabled by default, but the feature can be disabled through the `SQL_CONSOLE_ENABLED` property in the `appserver.advanced.properties` file.

- **Database Details**—This feature provides information that can be useful to estimate the time it will take for an upgrade

The View Database Details screen lists the name of each database table, the number of rows for each table, and the size of the database table. Additional information includes the database type, detailed version information, and the name of the database schema. The information can be exported into a CSV file and sent to Infogix Customer Support.



Support personnel can use this information to help you plan for your upgrade process.

- **Subsystem Logging**—You can enable debug logging by subsystem rather than individual categories. A subsystem bundles sets of logging categories that span multiple components and classes. Managing logging by subsystem simplifies the process and is less prone to error.

A logging subsystem that pertains to JBoss® is not retained if you stop the server. The setting for product-level logging subsystems is retained if you stop and then restart the server.

- **Audit Trail**—SQL statements are logged as an audit event in the admin-console-audit.log file. You can access this file from the View Configuration and Log Files screen.

Installation Process Enhancements

WebSphere Console Deployment for Infogix ER

This release supports a manual deployment on the WebSphere Administrative Console for Infogix ER. A new chapter is included in the *Infogix Console-based Deployment Guide for WebSphere* with tasks specific to Infogix ER.

New Additions to Installation Documentation

The installation documentation set includes two new guides: the *Infogix Installation and Upgrade Troubleshooting Guide* and the *Infogix Administrative Console Guide*.

- **Troubleshooting Guide**—Previously, the *Infogix Server Installation Guide* and the *Infogix Server Upgrade Guide* each contained a Troubleshooting chapter. The information in that chapter along with additional information is now contained in a new guide, the *Infogix Installation and Upgrade Troubleshooting Guide*.

This guide describes errors, warnings, and problems that you might encounter during the various steps of the installation or upgrade process. The information includes causes and resolutions.

- **Infogix Administrative Console Guide**—A guide that documents the functionality of the Infogix administrative console will be included on the installation documentation CD. This guide provides an overview of each platform feature in the administrative console and walks you through the tasks that you can perform.



Interested stakeholders who do not have access to the administrative console can use this guide to learn about the new functionality.

Externalize WebSphere Queues

The default process for a WebSphere deployment automatically creates and configures the required JMS queue connection factories, the JMS queues, and the JMS activation specifications.

If you re-deploy or upgrade, the JMS components (connection factories, queues, and activation specifications) are deleted. However, you can use external message queues, which are not deleted or overridden during a redeployment or an upgrade.

To externalize queues, you must be familiar with the WebSphere Console and know how to create JMS queue connection factories, JMS queues, and JMS activation specifications.

Within each product-specific properties file, the `WEBSHERE_EXTERNAL_QUEUES` property lists the required queues for that particular product. The property resides in the Do Not Change section, and by default, is commented out. If you leave the property as is, the system follows the default process to automatically create connection factories, queues, and activation specifications. You can choose to externalize all queues or only some queues.

Enhancements to the Validation Process

When you run the script to validate the configuration settings, the system tracks errors and warnings but allows the process to complete. You can then resolve all validation errors prior to running the script again. See the *Infogix Installation and Upgrade Troubleshooting Guide* for detailed information about validation errors and warnings.

Standalone Database Validator

Upgrade problems can result if your database is not in an upgrade-ready state. It may not be easy to determine whether your existing database is in the correct state, and it is possible to perform what appears to be a successful upgrade, only to experience problems later.

The new standalone database validator enables you to test the state of your existing database schema before you begin the actual upgrade process. The validation script checks tables, columns, and constraints to make sure that they exist and that they are the correct size and type. The script checks to see that the database has not been changed.

Database Upgrade Process

Changes to the database upgrade process ease the process of upgrading from a previous release.

Previously, the upgrade process did not save completed tasks so any failure required that a user complete the process again from the beginning. The new process allows a user to restart the process from the last successful task. However, if needed, a user can choose to override any changes to the database and can restart the upgrade process from the beginning.

The new process tracks the progress of the upgrade procedure; throughout the process, progress notes show the current task and its status, and where possible, the number of records processed.

The new procedure continues to support both the express and custom upgrade processes. Script names have been renamed to clarify their purpose and the process enforces the correct order for running the scripts.

The table below shows the previous script names and their replacements.

Previous Script Name	New Script Name
gen-update-db	gen-upgrade-db
update-tablespaces.sql	upgrade-tablespaces.sql
update-before-update-data.sql	upgrade-schema-tables.sql
populate-update-data	upgrade-db
update-after-update-data.sql	upgrade-schema-tables-finish.sql
update-base-data	upgrade-db-finish
update-db	upgrade-db-express

The new upgrade process includes a more thorough validation of the product schema. The new scripts automatically validate against the new or upgraded schema.

This upgrade process will use the value from the `UPGRADE_FROM_VERSION` property to determine the product version that you are migrating from. However, the process will create a new database table that tracks the product version. Subsequent upgrades will use this table to determine the product version, thus avoiding errors caused by an incorrect entry in the property.

Checksum

A checksum file is now delivered for each installation zip file. You can compare the value in the checksum file to the value obtained for each zip file to verify



that the contents for each zip file were not corrupted during the download process. UNIX and Linux provide a checksum tool. For Windows®, you can use a third-party MD5 checksum tool.

Change Logs for Upgrading to Infogix ER 4.0

This section summarizes any changes that might affect customers who are upgrading from Infogix ER 3.1 to Infogix ER 4.0.

For instructions on upgrading from a previous version of Infogix ER to Infogix ER 4.0, please refer to the *Infogix Server Upgrade Guide*.

Environment Change Log

When upgrading from Infogix ER 3.1 to Infogix ER 4.0, there are **no changes** to any of the environments.

The environments include the following:

- JAVA
- JBoss
- WebSphere
- Oracle
- SQL Server

Application Server Properties Change Log

When upgrading from Infogix ER 3.1 to Infogix ER 4.0, there is **one change** to the application server properties files for JBoss or WebSphere. The change is in the `appserver.advanced.properties` file.

The application server properties files include the following:

- `appserver.properties`
- `appserver.advanced.properties`



The following property was added to the appserver.advanced.properties file.

Property	Description
SQL_CONSOLE_ENABLED	The SQL console is enabled by default. The feature can be disabled through this new property.

Database Server Properties Change Log

When upgrading from Infogix ER 3.1 to Infogix ER 4.0, there are **no changes** to any of the database server properties files for Oracle or SQL Server.

The database server properties files include the following:

- database.properties
- database.advanced.properties

LDAP Server Change Log

When upgrading from Infogix ER 3.1 to Infogix ER 4.0, there are **no changes** to any of the LDAP servers.

The LDAP servers include the following:

- IBM Tivoli Directory Server
- Microsoft ADAM
- Sun ONE Directory Server
- Windows Server 2003 Active Directory

Properties Files Change Log

This section summarizes the changes made to configuration items in property files for Infogix ER 4.0.

New Components in ER.properties

The following properties were added to the ER.properties file. For more information about the properties in the table below, refer to the *Infogix Properties Guide*.

Property	Description
UI_MAX_SAVED_SEARCHES	Specify the maximum number of favorite searches each user can save for a search screen. Modification to this property requires redeployment.
SWING_CLIENT_JVM_ARGS	Specify the maximum size for the permanent generation heap. The default is 265m (256 megabytes).
PRODUCTION_MODE	The default value is true . When enabled, this option disables the Delete button for reconciliation processes, reconciliation definitions, and adjustment definitions. Modifications to this property require redeployment.
RECON_PROCESS_FAILURE_EMAIL_NOTIFICATION	The default value is false . Set to true to send a notification email if a reconciliation process fails.
ATTACH_SERVER_LOG_FILE_WITH_EMAIL_NOTIFICATION	The default value is true . Set to true to attach the server log file to the notification email in a zipped compressed format.
EMAIL_NOTIFICATION_ADDRESSES	Specify the valid email addresses to be notified if a reconciliation process fails. The email addresses are separated with a semicolon (;).
EMAIL_NOTIFICATION_SENDER	Specify the sender's name to display in the FROM field of the notification email.



Property	Description
EMAIL_NOTIFICATION_SM_ADDRESSES	Specify the valid email addresses to receive short messages. The email addresses are separated with a semicolon (;). The body of the message is limited to one line of 120 characters or less. Exception stack traces are not included in the message and no server log files are attached.
TAG_RULES_ON_EXPORT	The default is false . When set to true, this option tags exported components with a tag specified in the RULE_RELEASE_TAG parameter.
CHECK_RULE_TAG_ON_IMPORT	The default is false . When set to true, this option checks that the imported rules have an acceptable tag specified in the ACCEPTABLE_RULE_RELEASE_TAGS parameter.
RULE_RELEASE_TAG	Specify the release tag to apply to each exported component. Valid characters are 0-9, a-z, and period (.).
ACCEPTABLE_RULE_RELEASE_TAGS	Specify the release tag required for imported components. Release tags are separated with a semicolon (;). Valid characters are 0-9, a-z, and period (.).

Components Moved to ER.properties

Currently, some configuration items that customers frequently use are found in individual component properties files. To make it easier to manage and upgrade, in Infogix ER 4.0 these component items have been moved to the ER.properties file. For more information about the properties in the table below, refer to the *Infogix Properties Guide*.

Property	Previous Properties File
CD_TELLERID_INPUT_SIZE_LIMIT	cashdifferences.properties
PROCESS_VIEWER_AUTOREFRESH_INTERVAL	reconciliation.properties
AUDIT_SYSTEM_AGING_ACTIVITY	reconciliation.properties



Property	Previous Properties File
AUDIT_SYSTEM_ROUTING_ACTIVITY	reconciliation.properties
AUDIT_ADD_NOTES	reconciliation.properties cashdifferences.properties adjustments.properties

New Component in Do Not Change Section of ER.properties

The following property was added to the Do Not Change section of ER.properties. Refer to Externalize WebSphere Queues on page 18 for more information about the purpose of this property.

This property should not be changed without first contacting Customer Support.

Property	Description
WEBSHERE_EXTERNAL_QUEUES	<p>This property applies only to WebSphere.</p> <p>This property is commented out by default, which results in the automatic creation of connection factories, queues, and activation specifications.</p> <p>To manually create connection factories, queues, and activation specifications, uncomment this property.</p> <p>To manually create only some queues, delete the queue names for which you want to automatically create queues and then, after deployment, manually create the specified queues in the WebSphere administrative console.</p>

New Components in reconciliation.properties

The following properties were added to the reconciliation.properties file. Changes to these properties require a redeploy.

Property	Description
DUPLICATION_INDICATOR	Specify the text field in the Model Definition Item table used when an item is duplicated from current or history.
DUPLICATION_INDICATOR_VALUE	Specify a value that the system automatically populates in the DUPLICATION_INDICATOR field.



Property	Description
ENABLE_PARALLEL_PURGE	Set to true to enable parallel processing for Recon data purge.
NUM_PARALLEL_PURGE_THREADS	Specify the number of parallel purge threads. This number matches the number of top level recon types that need to be purged. The default value is 8.

New Components in annotation.properties

When sending emails, how a user's email From display name appears depends on the customer's directory setup. Some companies use a From display name that is configured LastName, FirstName. The issue is that this format may not be accepted by all email servers without using quotes around the display name.

Two new properties can be added to customize the Infogix ER email client's validation and sending of the customer's email From display name. The properties are added in the igx-data/igx/ER/config/annotation.properties file.

If one or both properties are added, redeploy and restart the Infogix ER Rich Client.

Contact Customer Support for additional information and help if these properties need to be added.

Property	Description
EMAIL_FROM_DISPLAYNAME_VALIDATION_PATTERN	This property allows the user to enter a pattern to customize the email GUI validation. For example, the pattern .+ (period followed by a plus sign) would allow the LastName, FirstName format to be valid.
EMAIL_QUOTE_FROM_DISPLAYNAME	If the user sets this property to true, quotes are automatically added behind the scenes if the display name format is unusual, for example, contains commas.



Component Change to workmgmt.properties

The following property default was changed to false in the workmgmt.properties file.

Property	Description
USER_OWNER_AUTO_DISCOVERY_ENABLED	The default value is false . By default, an owner is not auto-created when logging in from the Web Administration site.

Known Issues

This section describes any known issues.

- The Cash Differences feature is currently not supported on SQL Server.
- 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* error. Use the note function instead as a work around to this issue. (ER-3973)
- If a subreconciliation is active but the parent reconciliation is inactive, the system throws an error and the menu bar on the user interface disappears. The work around for this issue is to make the parent reconciliation active to redisplay the menu bar. (ER-4639)
- The size and location of the Rules UI Definition Preview window is not saved when the UI Definition is saved.
- If a text field is defined as 1 character, the User Interface may prevent you from entering a wildcard or negative match operator **and** the search criteria. The workaround for this issue is to increase the field size to 2 characters.
- If Infogix ER logs you out after a specified time and you log back in, the Help > About Us pop-up may not display promptly. The workaround for this issue is to close the Rich Client Application, re-open it, and log in again.



Changes to System Requirements

To download the current technical specifications, see the Infogix Web site:
http://www.infogix.com/pages/products/er/infogix_er.aspx.

Obtaining Product Updates

Be sure to check for product updates for the 4.0 release. Log on to
<http://support.infogix.com> and download any applicable fix packs or patches.