



Release Notes | Release 4.2




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CONTENTS

Overview	5
Contacting Customer Support	5
What's New	5
Infogix ER Application Enhancements.....	5
Letter Enhancements	5
Letter Output Types	5
Configurable Letter Attachment Size Limit	6
Configurable Local Letter Output Option	6
Start of Day Enhancement	6
Infogix ER SOD Thresholds	6
Rules Enhancement.....	6
Multiple Adjustment Entry Validation Rules	6
Updated List of Functions and Operators for Recon Entity Rules (ER-5372).....	7
Productivity Enhancements	7
Key Word Restriction	7
Testing for Cash Differences Workflow Rules	7
Enhanced Cash Difference Screens Edit Field Display Functionality (ER-5332).....	7
Automatically Remove Field Mappings when Recon Entity Fields are Removed (ER-5038)	8
Notes Indicator is No longer displayed when duplicating from an Item Containing a Note (ER-5302)	8
Infogix ER Gateway No Longer Sends Extra Process Complete Gateway Notification when SOD/EOD is Forcefully Started (ER-5276)	8
Corrected Syntax Issue in ER.properties (ER-5300).....	8
Validation of Obsolete Fields within User Interface Definitions at Sub Reconciliation Level (ER-5370)	8
Validation of Side Indicator Values in Item Rules for Reconciliations (ER-5304).....	8
Technology Upgrades and Enhancements	9
Java 7 Support	9
Infogix Platform Enhancements.....	9
Multiple Role/Group Mappings in LDAP.....	12
Oracle Bulk Load Enhancement	12



- Enhanced Web Services 12
- TCP Cluster Communications 12
- WebSphere 8.5.5 Support 12
- JBoss Single Sign On (SSO) Support 12
- Change Logs for Upgrading to Infogix ER 4.2 12**
 - Environment Change Log 12
 - Application Server Properties Change Log 12
 - Database Server Properties Change Log 14
 - LDAP Server Change Log 16
 - Infogix ER Application Change Log 16
- Known Issues 16**
- Changes to System Requirements 17**
- Obtaining Product Updates 17**



Overview

This document is intended for Infogix ER® customers who upgrade to Release 4.2. 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

Infogix ER Application Enhancements


This section summarizes the application enhancements for the Infogix ER 4.2 release.

Letter Enhancements

Letter Output Types

In this release Infogix ER can now support multiple types of letter outputs. In addition to the standard PDF letter output, new letter output plugins can also be deployed to support additional letter output formats.

The additional Letter Output Plugins can be deployed to Infogix ER servers by adding the plugin jar files to the "PLUGINS_DIR" folder, as configured in ER.properties.



A new Output Types rule has been added to letter definitions. It can be used to manage the letter output type for each letter definition. See online help for details.

Configurable Letter Attachment Size Limit

Infogix ER administrators can now set limits on the size of individual image files attached to letters.

The MAX_LETTER_ATTACHMENT_SIZE property in ER.properties can be set to the maximum size of individual image files that the users can attach. Users will receive an error if they try to attach image files exceeding the configured size limit. See the [Properties Files Change Log](#) section for more details.

Configurable Local Letter Output Option

Local letters are letters that are printed locally and not sent to an output queue by adjusters. In this release, local letters can be configured for output at the system level, through the OUTPUT_LOCAL_LETTERS property in ER.properties. Such a configuration can be useful for archiving purposes. See the [Properties Files Change Log](#) section for more details.

Start of Day Enhancement

Infogix ER SOD Thresholds


The Infogix ER Start of Day Thresholds gives administrators the ability to define threshold limits for new and open items being sent to the system during Infogix Assure processing.

There are two types of thresholds: Alert and Error. Both thresholds are checked at the beginning of SOD processing. If Alert thresholds are violated, an email alert is sent to the configured email addresses. If the Error Threshold is violated, processing stops to allow immediate troubleshooting and correction of the issue.

Rules Enhancement

Multiple Adjustment Entry Validation Rules

For adjustment entry validation, multiple entry validation rules can now be written that validate an entry field against multiple adjustment entries. This type of rule prevents users from entering invalid information in an entry field when additional entries are added to the adjustment.



See the online help for detailed instructions and examples.

Updated List of Functions and Operators for Recon Entity Rules (ER-5372)

In previous versions of the application, the Functions list and Operators list in the rule building windows had subsets of all standard functions and operators available in the application. In this version, the complete list of both functions and operators are now available in the Recon Entity Edit Aggregation Rule, Recon Entity Edit Calculation Rule, Recon Entity Edit Status Rule, and the routing rules for items, recon entities, and match sets.

Productivity Enhancements

Key Word Restriction

To avoid processing issues that occur when data model fields names collide with keywords in the application or underlying database, this release includes a configurable reserved words properties file.

This file may be customized; customization of the file requires a server restart to become effective. The file is used at run-time to allow or restrict use of database reserved words and keywords as field names in a component's model definition.

Keywords for both Oracle and Microsoft SQL Server are included by default in the restricted words list.

Testing for Cash Differences Workflow Rules

Users are able to test a Cash Differences Workflow Rule for expected results, which will make rule writing easier to troubleshoot. A Cash Differences 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.

Enhanced Cash Difference Screens Edit Field Display Functionality (ER-5332)

Additional formatting options are now available for text fields in the User Interface Definitions for Search Cash Differences, Search Teller, and Search Exceptions screens. They now have the same formatting options as in the reconciliation search screens, such as padding options.



Automatically Remove Field Mappings when Recon Entity Fields are Removed (ER-5038)

When Recon Entity fields are removed from the data model, Infogix ER will now automatically remove any corresponding Recon Entity Field Mapping from the Recon Entity rule, which helps to prevent runtime errors.

Notes Indicator is No longer displayed when duplicating from an Item Containing a Note (ER-5302)

The Notes Indicator is no longer displayed for a new item when duplicating from an existing item containing a note.

Infogix ER Gateway No Longer Sends Extra Process Complete Gateway Notification when SOD/EOD is Forcefully Started (ER-5276)

Infogix ER Gateway no longer sends a process complete notification when EOD/SOD is forcefully started and the Reconciliation is already in EOD/SOD state. This helps to avoid additional data extract processing in Infogix Perceive, triggered by the extra Infogix ER Gateway notification.

Corrected Syntax Issue in ER.properties (ER-5300)


The syntax for the CD_TELLERID_INPUT_SIZE_LIMIT property has been corrected. In previous release this property name contained a trailing space and will not be migrated automatically by the configuration migration script during product upgrade.

Validation of Obsolete Fields within User Interface Definitions at Sub Reconciliation Level (ER-5370)

When user saves sub-reconciliation definitions, Infogix ER will validate the User Interface Definitions for use of obsolete data fields and issue appropriate error messages.

Validation of Side Indicator Values in Item Rules for Reconciliations (ER-5304)

In previous releases, reconciliation administrators could enter side indicator values in the Items Rules > Side Assignment screen that do not have size restrictions. However, the item side indicator field in the reconciliation data model is restricted to 10 characters in the database. This discrepancy allowed administrators to enter values that were larger than the size defined in the database, resulting in persistence exceptions at run-time.



For Infogix ER 4.2, the interface to enter and edit the item side indicator restricts the entered values to the maximum size defined for item side indicator field in data model.

Technology Upgrades and Enhancements

Java 7 Support

Infogix ER now supports the use of Java 7, in addition to Java 6, for both server and client.

Infogix Platform Enhancements

In addition to product enhancements, there are several Platform-level enhancements included in this release. The following sections present an overview of those enhancements in relation to product functionality.

Software Supported

- IBM WebSphere 8.5.5 is now supported.
- Java 1.7 is now supported for JBOSS 6.1.0 and IBM WebSphere 8.5.5.

Infogix Administrative Console

Several enhancements were made to the Infogix administrative console for this release. The administrative console enables users to gather and provide information to Infogix Customer Support for use in troubleshooting run-time problems.


Process & Memory Viewer

The Process & Memory Viewer displays processes that were executed, or are currently running on your system for the selected time interval. System activity information for each node is collected and graphically represented.

For Infogix Assure only, Control Point executions are shown in the Process section.

Diagnostic Package includes Installation Properties

The installation properties like, the `appserver.properties`, `appserver.advanced.properties`, `database.properties`, `database.advanced.properties`, and the `product.properties`, are now bundled within the diagnostic package.



Any password related properties are removed during the creation of the diagnostic package.

Active Directory Nested LDAP Group Support

Active Directory® is a directory service that stores information about objects on a network and makes this information available to users and network administrators. Organizations may sometimes create nested groups to reflect their organizational structure. Nested groups can have groups as members.

Infogix applications now support the retrieval of users from nested groups. This feature allows customers deploying Infogix applications in WebSphere or JBoss to access user information from nested groups. This eliminates the need to flatten a nested group hierarchy to support Infogix applications.

JBoss Single Sign On Support

In prior releases, it was not possible to seamlessly access different Infogix applications. Users now can navigate between Infogix applications without having to provide their login credentials in JBoss. For example, visiting a Control Point Result from Infogix Insight to Infogix Assure does not require re-authentication.

JBoss single sign on ability is limited to Infogix products only, and does not provide ability to integrate with other enterprise applications.

Please contact Infogix Support for details on how to configure single sign on support.

JBoss Data Source Configuration


In prior releases, it was difficult to manage data sources in JBoss. Users had to edit or create a new `<data_source_name>-ds.xml` and restart the JVM to pick up the changes. Managing these data source files involved manual steps as these file are removed after running `clean.bat (.sh)` or `deploy.bat (.sh)` scripts.

In this release, the configuration of data sources has been simplified in JBoss. You can now define the details of the data source in the properties file: `Infogix/config/default/${product}/datasources.properties`.

The configuration file also supports password encryption. The command `update-datasources.bat (.sh)` can be run to deploy data sources to JBoss.

Cluster Communication Enhancements

Several enhancements have been made to Infogix applications in the areas of cluster communication and discovery. This eliminates the need to enable



multicast protocols in your environment to communicate and discover other cluster members. In prior releases, cluster communication and cluster discovery was based on UDP and JGroups ping protocols.

Starting with this release, applications use tcp and fileping for cluster communication and discovery, respectively. These protocols are more reliable for delivery of information as compared to UDP and ping options.

The options, “tcp” and “fileping” are now the default values.

These values are specified for the following properties in appserver.advanced.properties file:

```
CLUSTER_DISCOVERY_PROTOCOL=fileping
CLUSTER_TRANSPORT_PROTOCOL=tcp
```

Oracle Bulk Loader Environment Setting

Infogix applications now rely on retrieving the value of ORACLE_HOME from Infogix properties file instead of getting it from environment settings.

This new property eliminates issues with Oracle environment variables where it is not set correctly or when the applications are started using a profile that doesn't have these settings. In past releases, to enable the correct settings required customers to restart the servers; this often required the involvement of an administrator.

A new property, ORACLE_HOME, is now added in the database properties file. You need to specify the path where the Oracle client software is installed.

Integration Framework Changes


Several fixes were made within Integration Framework to support web services within the IBM Application Server. The Integration Framework now uses standard Java Web services that are bundled with the JDK. Infogix Assure web services are available from both the IBM and JBoss administrative consoles.

Multiple Group to Role Mapping

This feature allows multiple roles to be mapped to an Infogix role through the product properties files.

For example, you can map multiple groups in your LDAP to a single role by specifying comma separated values as shown below:

```
ROLE_SUPERUSER_GROUP_MAPPING=Superusers Region1, Superusers Region2
```



ROLE_KNOWLEDGE_WORKER_GROUP_MAPPING=KW Region1, KW Regoin2

Resource Creation at Cluster Level

Resources like Queues, Connection Factories, and Service Integration Buses are now created at the cluster level in WebSphere. This simplifies the installation process, especially when Infogix applications are deployed manually from the WebSphere administrative console.

Previously, these resources were created at the individual node level, which resulted in extended deployment times depending upon the number of nodes in a cluster.

Change Logs for Upgrading to Infogix ER 4.2

This section summarizes any changes that might affect customers who are upgrading from Infogix ER 4.0 to Infogix ER 4.2.

For instructions on upgrading from a previous version of Infogix ER to Infogix ER 4.2, please refer to the *Infogix Server Upgrade Guide*.

Environment Change Log

When upgrading from Infogix ER 4.0 to Infogix ER 4.2, the following changes have been made:

- Java - In addition to Java 6, Java 7 is now supported for the Infogix ER server and client in this release.
- JBoss - Single Sign On (SSO) is now supported in JBoss deployments in this version.
- WebSphere - Single Sign On (SSO) is supported in WebSphere. Additional support for WebSphere 8.5.5 has also been added to this release.
- Oracle - The bulk load configuration has been enhanced in this version of Infogix ER.
- SQL Server - No changes have been made for SQL Server in this release.

Application Server Properties Change Log

JBoss Application Server

When upgrading from Infogix ER 4.0 to Infogix ER 4.2, there were **no changes** to the application server properties file.

The following properties were **added** to the *advanced* application server properties file for JBoss:

Property	Description
INTERNAL_SSO_ENABLED	Flag that indicates if the internal SSO is enabled; use be used only with JBoss. The default value is false.
INTERNAL_SSO_COOKIE_NAME	Name of the internal SSO cookie.
INTERNAL_SSO_COOKIE_DOMAIN	<p>Domain(s) to set for the internal SSO cookie. An empty string value will not set a domain for the cookie unless the incoming request URL has a domain specification.</p> <p>With an empty value internal SSO will work only for all Infogix applications on the host that sets the SSO cookie or the subnet the host is in if the incoming URL has a domain specification.</p> <p>Set this to a valid domain value to expand the scope of the SSO beyond the behavior described above. Domain specifications must start with a '.' as in .example.com.</p>
INTERNAL_SSO_TIMEOUT	Expiration time for the SSO information in minutes.
INTERNAL_SSO_RESTRICT_BY_REMOTE_ADDRESS	Flag to restrict SSO to original remote address in the request that triggered # the creation of the SSO token. The default value is 120.
INTERNAL_SSO_LOGOUT_ENABLED	Deletes the cookie and disables SSO login/log out. The default value is true.
CLUSTER_DISCOVERY_PROTOCOL	Protocol used to discover cluster members. Valid values are ping, mping, jdbcping, and fileping. The default value is fileping.
CLUSTER_TRANSPORT_PROTOCOL	Protocol used to transfer information between the cluster members. Valid values are tcp and udp. The default value is tcp.
CLUSTER_TCP_START_PORT	Port used by the TCP protocol for cluster communication.



WebSphere Application Server

When upgrading from Infogix ER 4.0 to Infogix ER 4.2, there were **no changes** to the application properties file.

The following properties were **added** in the *advanced* application server properties file for WebSphere:

Property	Description
CLUSTER_DISCOVERY_PROTOCOL	Protocol used to discover cluster members. Valid values are ping, mping, jdbcping, and fileping. Default value is fileping.
CLUSTER_TRANSPORT_PROTOCOL	Protocol used to transfer information between the cluster members. Valid values are tcp and udp. Default value is tcp.
CLUSTER_TCP_START_PORT	Port used by the TCP protocol for cluster communications. Default is 7800.
HEAP_SIZE	Determines the heap size for the appservers.

Database Server Properties Change Log

Oracle Database

When upgrading from Infogix ER 4.0 to Infogix ER 4.2, the following property was **added** to the database properties file for Oracle:



Property	Description
ORACLE_HOME	The Oracle Home environment variable. The value will be set when invoking the bulk loader utility.

The following property was revised in the Oracle database properties file:

Property	Description
TABLESPACE_PREFIX	Prefix of the tablespace name. Previously, the default was @solution.short.name@; the default this version is \${solution.short.name}.

The following properties were removed from the *advanced* database properties file for Oracle:

Property	Description
DATABASE_DRIVER_LOCATION	Oracle database driver location.
DATABASE_VERSION	Oracle database version used only for populating application data during deployment.

These properties are no longer needed in the configuration files.

SQL Server

When upgrading from Infogix ER 4.0 to Infogix ER 4.2, there following property was revised in the SQL Server database properties file:

Property	Description
TABLESPACE_PREFIX	Prefix of the tablespace name. Previously, the default was @solution.short.name@; the default this version is \${solution.short.name}.

The following properties were removed from the *advanced* database properties file for SQL Server:

Property	Description
DATABASE_DRIVER_LOCATION	Oracle database driver location.
DATABASE_VERSION	Oracle database version used only for populating application data during deployment.

These properties are no longer needed in the configuration files.



LDAP Server Change Log

When upgrading from Infogix ER 4.0 to Infogix ER 4.2, there are **no changes** to any of the LDAP servers (security directory or user information directory properties).

The LDAP servers include the following:

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

Infogix ER Application Change Log


When upgrading from Infogix ER 4.0 to Infogix ER 4.2, the following properties were **added** to the application properties file.

Property	Description
OUTPUT_LOCAL_LETTERS	Flag to indicate if local letter output is enabled; by default, this parameter is false.
MAX_LETTER_ATTACHMENT_SIZE	Parameter to set the maximum size for a letter attachment. The default is -1, which is interpreted as no attachment size limitation.

Known Issues

This section describes any known issues.

- When using JRE 1.7.0_21 to 1.7.0_45, the rich client throws a Java security warning on start-up because the test certificate is a self-signed certificate.
In a test system, to bypass the warning click "I accept the risk and want to run this application" and click Run. This bypass option will only be valid for these versions; versions of Java after update 45 will not allow the application to run.
This warning will appear every time the rich client is loaded unless you install a certificate signed by a trusted cert authority. The warning will display if you use a self-signed certificate such as the one distributed with the product. (ER-5483)

- 
- 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 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 4.2 release. Log on to
<http://support.infogix.com> and download any applicable fix packs or patches.