



Release Notes | Release 4.3



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Overview

This document is intended for Infogix ER[®] customers who upgrade to Release 4.3. 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.

Customer Support

If you need assistance, contact Infogix Customer Support:

Call us at +1-630-505-1890 or submit a case online at support.infogix.com

If you are experiencing issues contacting us by phone or by our website please email support at support@infogix.com

Visit our website at www.infogix.com



What's New

Infogix ER Application Enhancements

This section summarizes the application enhancements for the Infogix ER 4.3 release.

Quick Match

Infogix ER Quick Match speeds the process of selecting items to create possible match sets based on match rules. The match determination is based on the rules definition. In Quick Match mode, the count of selected items, total left and right side amounts, and passing notifications for selected items are displayed on the status bar. This is much easier and faster way to identify manual match sets.

Under Quick Match mode, when user selects multiple items, Matching Rules defined for the Recon are evaluated against the selected Items. If the items meet matching criteria, they can be matched automatically by clicking the Match button. You can also click and drag the items to the New Match Set button to add them to the matching panel for further review and matching.

When Quick Match is "Off", or when Items are not selected, no matching results are shown.

Email Option on User Assign

In this release, users can receive email notification when an item or adjustment is manually assigned to them if the functionality is enabled by the administrator during deployment.

The email contains information regarding which items or adjustments are included in the user assignment. Emails are sent to those email addresses associated with the user profile of the assignee. If configured, a CC email will also receive the assignment email notice. This functionality is restricted to only those items that are manually assigned.



Welcome Page

This release includes a Welcome Page which is enabled by default. The Welcome page is displayed when first logging onto the system via the Infogix ER Client.

The Favorites tab is displayed by default; this screen displays a linked list of the user's saved favorite searches and the corresponding object ID for the search. The Overview tab is shown only for users having an Admin Role; it gives a graphical overview of the reconciliation process. The Help Quick Links navigates to view the Help Topics.

You can also access Welcome page from Help menu option available on the title bar.

Rules Catalog Enhancements

The Rules Catalog functionality that was introduced in ER 4.0 was restricted to only two rule types: Adjustment Approval Rules and Routing Rules. This functionality now supports search and rule assignment for Aging Rules and Recon Entity Status Rules.

As with previous releases, administrators can now use the rule catalog to search for and locate specific Aging Rules or Recon Entity Status Rules. Once a rule is located, the Admin can click on the rule and drag it to a different definition to copy the rule. Edits to the rule must still be made to ensure all the fields and values used are correct so that the rule will function as expected.

Work Owner Activity Log

In previous releases, there was no auditing available for revisions made to work owner definitions. With this release, any changes made to a work owner definition is tracked and recorded in the activity log. The activity log for work owners is accessed via the Activity Log icon, as with other application components.

When a work owner definition is no longer needed, the Activity Log data is deleted when the corresponding work owner is removed from system.

Concurrent Purge Prevention

At times, running a purge job may take longer than anticipated and sometimes remain unfinished before the next purge job runs. This leads to an overlap in purge jobs which causes potential resource contention or exhaustion and interference. To prevent a second purge job from running in the system, a configurable option is added in the property file, and is enabled by default.



When the concurrent purge prevention functionality is enabled, if a second purge is triggered while an existing purge process is executing, the incident will be logged and an email notification sent to the administrator email that is configured in the properties file.

Chunk Size for Purging

A dynamic configurable option, `PURGE_CHUNK_SIZE`, is added in release. This property controls the chunk size of a data purge after a component definition has been deleted.

Purging data by chunks helps avoid log space constraints in the database upon purging after a definition deletion. The chunk size is set to 5 by default and may be revised up to 1000 (maximum value). If a configured chunk size exceeds the system limits (that is, higher than 1000), a warning message is entered in the log and the system uses the maximum value (1000).

Log messages are generated to indicate purge progress.

Recon Skip List

A dynamic configurable option allows you to configure a list of reconciliations that will be skipped during retention and purge processing. This list is configured using the recon IDs found on the Core Definition tab of the recon definition.

You may choose to add reconciliation to the skip list, for example, if you wish to run retention on several other recons without impacting the recon on the skip list.

If the purging jobs run and the skip list is configured with a reconciliation ID, an email notification and a log message is triggered to alert the administrator.

Recon Action Availability Rules

In this release, a new type of reconciliation rule, Action Availability Rules, is available.

The Action Availability Rules allow the administrator to configure rules that govern when a user can close or re-open reconciliation items. Rules can be based on field values from the User Profile model, or from the Item model.

For example, an Action Availability Rule may be based on the value of a field in the user's profile by using a conditional statement similar to the following:

```
USERPROFILE.CANDOACTION = 'Y'
```



Rules may also be based on the reconciliation item's field values, like amount, age, priority, or status.

Action Availability Rules may be over-written by sub-reconciliations. If these rules are not over-written in the sub-recon definition, the sub-recon uses the parent Action Availability Rules.

Platform Enhancements

Standalone Database Migration

The standalone database migration script creates a compressed package containing the files required for the database upgrade.

The application server administrator must run the generate-standalone-upgrade script to create the standalone database upgrade package. The compressed zip file can be used by the database administrator to upgrade the database.

Technology Upgrades and Enhancements

Infogix Platform Enhancements

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

Software Supported

- Oracle 12c - Multitenant DB, New Oracle JDBC Driver
- Upgrade Hornetq - Improves JBoss JMS reliability

Change Logs for Upgrading to Infogix ER 4.3

This section summarizes any changes that might affect customers who are upgrading from Infogix ER 4.2 to Infogix ER 4.3.

For instructions on upgrading from a previous version of Infogix ER to Infogix ER 4.3, please refer to the *Infogix Server Upgrade Guide*.

Environment Change Log

When upgrading from Infogix ER 4.2 to Infogix ER 4.3, the following changes have been made:

- Java 7 - Multitenant DB, New Oracle JDBC Driver
- Oracle 12c - Improves JBoss JMS reliability

Application Server Properties Change Log

When upgrading from Infogix ER 4.2 to Infogix ER 4.3, there were the **no changes** to the JBoss or WebSphere server properties.

Infogix ER Application Change Log

When upgrading from Infogix ER 4.2 to Infogix ER 4.3, the following properties were **added** to the application properties file.

Property	Description
Java Swing Properties	
SWING_UI_SHOW_STARTPAGE	The default value is true . This option displays the Welcome page in the Infogix ER Rich Client.
Email Option on User Assign Properties	
RECON_USER_ASSIGN_EMAIL_NOTIFICATION	False by default. If true, a notification is sent to the assigned user for the selected items.
ADJUSTMENT_USER_ASSIGN_EMAIL_NOTIFICATION	False by default. If true, a notification is sent to the assigned user for the selected adjustments.
USER_ASSIGN_EMAIL_NOTIFICATION_FROM_ADDRESS	Specify a valid email address.
USER_ASSIGN_EMAIL_NOTIFICATION_REPLY_ADDRESS	Set a valid email address to handle all user assignment responses.
USER_ASSIGN_EMAIL_NOTIFICATION_MAX_MAIL_ITEMS	Specify the maximum number of items to be displayed in the notification email.
RECON_USER_ASSIGN_EMAIL_CC_ADDRESS_LIST	List the email addresses of users who must be included in the notification email. Use “;” as the delimiter.
RECON_USER_ASSIGN_EMAIL_EXCLUDE_USER_LIST	Specify a list of user IDs that must be excluded from the notification email. Use “;” as the delimiter.
ADJUSTMENT_USER_ASSIGN_EMAIL_CC_ADDRESS_LIST	List the email addresses of users, who must be included in the notification email. Use “;” as the delimiter.



Property	Description
ADJUSTMENT_USER_ASSIGN_EMAIL_EXCLUDE_USER_LIST	Specify a list of user IDs that must be excluded from the notification email. Use “;” as the delimiter.
Recon Concurrent Purge Properties	
RECON_CONCURRENT_PURGE_JOB_PREVENTION	This property prevents concurrent runs of recon purge jobs. It sends a notification email to the user with the details of the failed recon job. The default value is true .
RECON_PURGE_SKIP_LIST	Specify valid recon model IDs separated by “;” that must be skipped from the purging process.

Database Server Properties Change Log

When upgrading from Infogix ER 4.2 to Infogix ER 4.3 there were **no changes** to the database properties file for Oracle or SQL Server.

LDAP Server Change Log

When upgrading from Infogix ER 4.2 to Infogix ER 4.3, there were **no changes** to any of the LDAP servers (security directory or user information directory properties).

Component Properties

The following changes have been made in the component properties files.

Property	Description
PURGE_CHUNK_SIZE	The default value is 5 . This property is found in the Infogix\components\ActivityLog\conf\activitylog.properties file. After revising the property value, you must run update-config for changes to take effect.

Issues Fixed in this Release

The following issues have been fixed in this release:

Issue	Comments
ER-5473	<p>Description: The last column of any recon search screen is non-sortable.</p> <p>Resolution: Code changes to make enabled last column sorting in the recon search screen results; the last column is now sortable as are other columns in the results table.</p>
ER-5390	<p>Description: The adjustment Set Fields by Look up does not work with NVARCHAR data type fields in SQL Server deployments.</p> <p>Resolution: Code changes to enable the NVARCHAR data type in SQL Server.</p>
IP-2585	<p>Description: Using LDAP groups as fully qualified distinguished names produces naming exception warnings.</p> <p>Resolution: The warnings are benign; however, code was fixed to remove the warnings from being logged.</p>

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 until the administrator installs a trusted certificate.
The cert warning appears 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. However, after the appropriate certificate from a trusted cert authority is installed the warning will not appear.
- 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.

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