



# Release Notes | Release 4.5




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## Overview

This document is intended for Infogix ER® customers who upgrade to Release 4.5. 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.

Support Phone: +1.630.505.1890

Support Email: [support@infogix.com](mailto:support@infogix.com)

Support Website: <http://support.infogix.com>

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## What's New

This section summarizes the enhancements for the Infogix ER 4.5 release.

### Reconciliation Enhancements

#### Secure Text Fields

This version of Infogix ER includes a new data type, Secure Text, available in the reconciliation data model.

A Secure Text data type, by default, has field values masked in the user interface and encrypted in the database. Because data are encrypted, Secure Text fields require more database space than regular text fields; this should be taken in to account when administering and monitoring the application database.

Due to the sensitive nature of data in Secure Text data type fields, these fields cannot:

- Be used in search criteria
- Be used in field mapping rules for an adjustment
- Be used as identity fields for recon entities, match sets, or items
- Be used in matching rules or other rules
- Will not be pushed to Infogix Sagacity (definition or data)

Existing text fields in a reconciliation cannot be converted to a Secure Text data type field.

#### New Permission

To manage the security surrounding Secure Text fields, the application includes a new security permission (View Secure Values) in the Recon Data permission set.

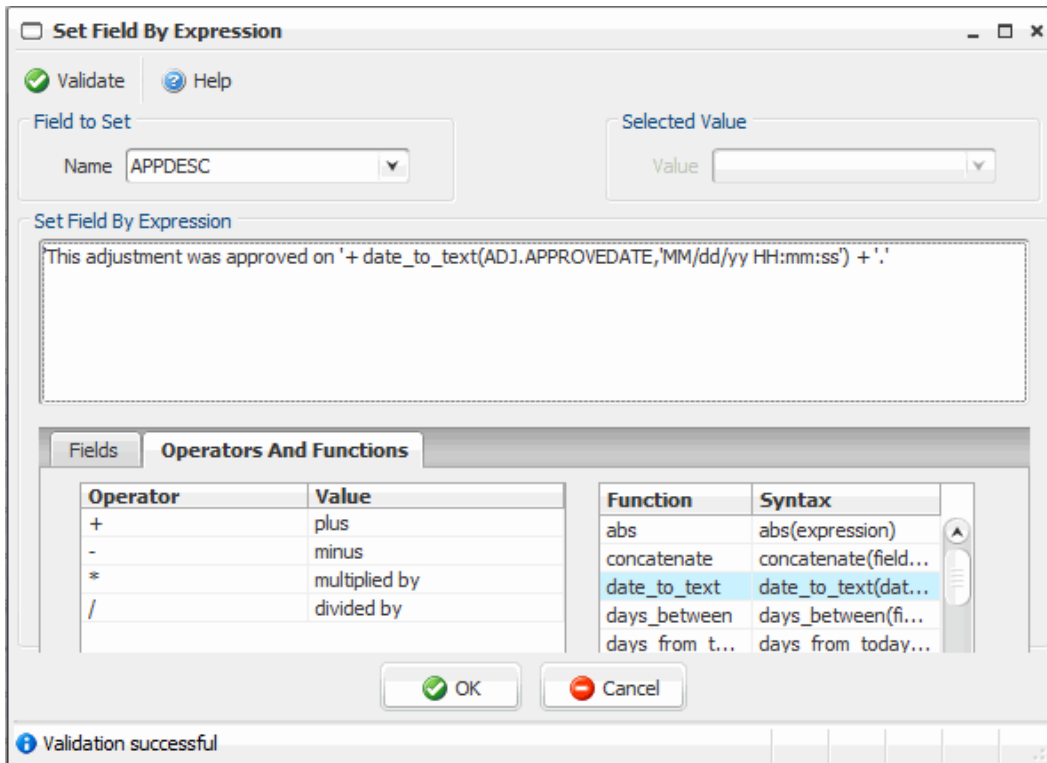
If a work owner is granted the View Secure Values permission, they will be able to use the Unmask button to view the values of a Secure Text field. If a work owner does not have this permission, the Unmask button is disabled and data will not be visible to the user.

## Adjustment Enhancements

### Date Formatting in Adjustment Workflow Rules

This release of Infogix ER includes a new function, `date_to_text`, which formats a date or timestamp value for use in a text field (for example, in a description field). This function is available in the adjustment Workflow Rules.


As an example, you can configure a rule to add a descriptive summary that includes the date and time, as seen in the following graphic.



The `date_to_text` function takes a date or timestamp field as the first parameter, and a formatting string as the second. The formatting string is based on the standard Java formatting syntax; for more details, refer to the "Format options for dates and times" section of the *Edit Field Display* topic in the rich client help files.

### Letter Data Access in Adjustment Workflow Rules

In this version of Infogix ER, two adjustment workflow events, the Pre-Update Adjustment Entry Field event and Post-Update Adjustment Entry Field event,



may use Letter data in an If Condition or Set Field By Expression statement within the rule.

Only fields from the data models of letter definitions used in the adjustment's Letter Applicability Rules may be used in Workflow Rules, and access is read-only.

The example below illustrates how letter data may be accessed and used in an adjustment entry field. In this example, the rule first checks to ensure the letter exists and is the letter type expected. The check uses a multi-part If Condition:

```
LETTERINFO.LETTEREXISTS AND LETTERINFO.LETTERDEFID = "CREDITLETTER"
```

This simple check avoids run-time errors that can occur when the rule attempts to access data that does not exist.

Next the rule uses a Set Field By Expression to set an entry description field, using text and letter data:

```
'Deposit for $' + LETTER.DEPOSITAMOUNT + ' posted as $' +  
LETTER.POSTAMOUNT + '.'
```

To create a similar rule:

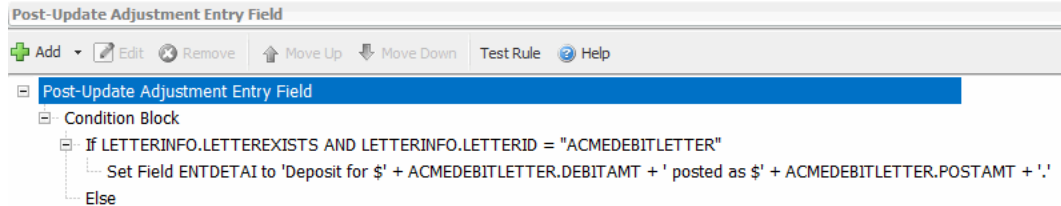
1. Click **Administration > Management > Adjustment Definitions**.
2. Select an adjustment definition and click the **Workflow Rules** stack tab.
3. In the top pane, select either the *Pre-Update Adjustment Entry Field* or *Post-Update Adjustment Entry Field* event.
4. In the bottom pane, select the event name.
5. Click **Add > Condition Block**.
6. In the *If Condition* area, use the *Fields* and *Operators And Functions* tabs to add the elements of the condition.
7. Click **Validate**.
8. When the condition validates successfully, click **OK**.
9. Select the condition just added and click **Add > Set Field By Expression**.
10. In the *Set Field By Expression* text area, build the expression using the *Fields* and *Operators And Functions* tabs.
11. Click **Validate**.



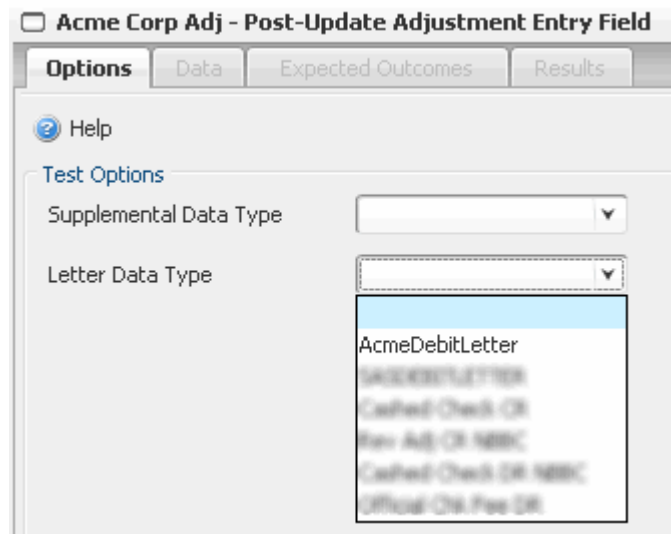
12. When the condition validates successfully, click OK.

13. Save the adjustment definition.

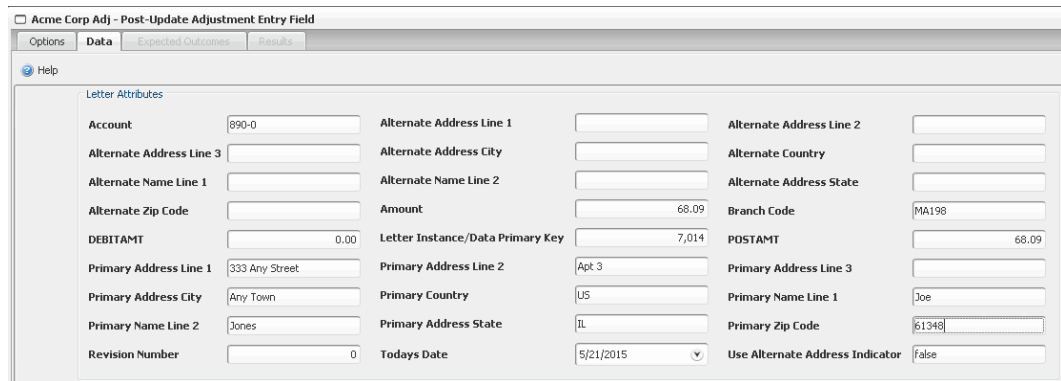
For example, the resulting rule will be similar to the following:



To help test and troubleshoot rules that use letter data, the letter component is incorporated into the Test Rule functionality. After selecting the rule to test and clicking Test Rule, select the letter type from the Letter Data Type pull down list in the testing pop up window.



If letter data is available, it will be populated in the Data tab for use in testing the rule, as is other component data.





## Change Logs for Upgrading to Infogix ER 4.5

This section summarizes any changes that might affect customers who are upgrading from Infogix ER 4.4 to Infogix ER 4.5.

For instructions on upgrading from a previous version of Infogix ER to Infogix ER 4.5, please refer to the *Infogix Server Upgrade Guide*.

### Environment Change Log

When upgrading from Infogix ER 4.4 to Infogix ER 4.5, changes were made to the following:

- JAVA
  - Upgraded code to use EJB3.
  - Use of the outdated edu.oswego concurrency package was removed; the newer standard Java concurrency implementation is now used.
  - Fixed an existing issue when using an IBM JDK to deploy products on JBoss.
  - Fixed an issue on WebSphere 8.5.5 where thread dumps were not getting created correctly from the Infogix Admin Console.
- JBoss
  - Implemented protection against vulnerability from a “Poodle Attack” in JBoss.

There were **no changes** made to the following:

- WebSphere
- Oracle
- SQL Server

### Application Server Properties Change Log

#### JBoss Application Server

When upgrading from Infogix ER 4.4 to Infogix ER 4.5, the following changes were made to the application server properties file for all deployment types:



Property	Description
ADMIN_NOTIFICATION_EMAIL_LIST	A comma separated list of email addresses to which discarded event notification warning emails should be sent.

## WebSphere Application Server

When upgrading from Infogix ER 4.4 to Infogix ER 4.5, the following changes were made to the application server properties file for all deployment types:

Property	Description
ADMIN_NOTIFICATION_EMAIL_LIST	A comma separated list of email addresses to which discarded event notification warning emails should be sent.

## Database Server Properties Change Log

### Oracle Database

When upgrading from Infogix ER 4.4 to Infogix ER 4.5, there were **no changes** to the database properties file for Oracle.

### SQL Server

When upgrading from Infogix ER 4.4 to Infogix ER 4.5, there were **no changes** to the SQL Server database properties file.

## LDAP Server Change Log

When upgrading from Infogix ER 4.4 to Infogix ER 4.5, there are **no changes** to any of the LDAP servers.

Supported LDAP servers include the following:

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

## New Components in ER.properties

When upgrading from Infogix ER 4.4 to Infogix ER 4.5, there are **no changes** to the Infogix ER properties file.

## Fixed in this Release

The following issues have been fixed in this release of Infogix ER.

JIRA	Details
ER-5626	<p><b>Description:</b> The RENTITYSTATUS code set was originally defined as a system-defined field, but was changed to a user-defined field in later versions to allow users to configure the field values. However, in some upgraded versions of the application, this field was still configured as a system-defined field, preventing administrators from editing the values.</p> <p><b>Resolution:</b> Code was revised so that the field is converted to a user-defined field type prior to saving any change to the RENTITYSTATUS field.</p>
ER-5634	<p><b>Description:</b> Close/Reopen actions were not working correctly on the Recon Entity Detail screen.</p> <p><b>Resolution:</b> Code was altered to restore functionality to the Close/Reopen buttons when executed from a Recon Entity Detail screen.</p>
ER-5644	<p><b>Description:</b> In cases where recon entities were moved between first-, second-, or third-level reconciliations and then subsequently deleted, some referenced objects were not purged when the recon definition/data was deleted.</p> <p><b>Resolution:</b> The purge process was improved to identify and delete referenced emails, attachments, and notes in cases where recon entities were moved prior to deletion.</p>
ER-5645	<p><b>Description:</b> In the reconciliation Routing Rule, if the default routing assignment was deleted, the application performed the assigned routing anyway.</p> <p><b>Resolution:</b> Code was revised to ensure on default routing deletion and Save, the routing assignment was correctly removed.</p>
ER-5647	<p><b>Description:</b> When an object is purged via retention, the</p>

	<p>notes/attachments/emails activity logs for the object remains.</p> <p><b>Resolution:</b> The purge routine was enhanced to include checks for "orphan" references belonging to objects that have already been purged through routine retention.</p>
ER-5672	<p><b>Enhancement:</b> Unnecessary work item history purged during Rollback execution.</p> <p><b>Resolution:</b> As a part of Rollback execution, general work item history is no longer purged, resulting in improved rollback execution times.</p>
ER-5739	<p><b>Description:</b> When using Quick Match, if an item's amount has no cents in the value (i.e, 1.00), the number truncated to the whole number (i.e., 1); if an amount ends in a zero (i.e., 1.90), the zero is not displayed (i.e., 1.9).</p> <p><b>Resolution:</b> Code was revised to take formatting for Quick Match information from fields configured in the reconciliation's Matching Rules &gt; Match Set &gt; Calculated Field Assignment. If these rules are not configured, the formatting behavior will continue to truncate values with no cents, or ending in zero; however, if the fields are configured, the Quick Match information will show the complete value including ending zeros.</p>
ER-5741	<p><b>Description:</b> The Welcome screen is not showing all saved Favorite Searches for some sub-reconciliations.</p> <p><b>Resolution:</b> In cases where a sub-reconciliation match set or item search overrode the top-level reconciliation search but the recon entity search screen was not overridden, saved Favorite Searches created from the sub-reconciliation search screen were not correctly listed on the Welcome screen. Code was revised to not rely on a recon entity screen override to list saved favorite searches.</p>
ER-5742	<p><b>Description:</b> The date combo box located on the Item detail screen did not allow selection of the recon date.</p> <p><b>Resolution:</b> Code was being triggered twice for each Selected and Unselected event, causing the issue. Code was revised to only execute only once per event, fixing the combo box selection issue.</p>
ER-5675	<p><b>Description:</b> Saved search incorrectly populates fields with similar names.</p>



	<p><b>Resolution:</b> Code was changed so the evaluation of field identity is now based on the entire field. This allows similarly named fields to exist without conflict in a saved favorite search.</p>
ER-5678	<p><b>Description:</b> Supplemental Data validation errors prevent full text from being entered in a text field.</p> <p><b>Resolution:</b> Validation of Supplemental Data entries is delayed to allow a user to enter the complete text content.</p>
ER-5687 ER-5713	<p><b>Description:</b> Formatting is applied after entering a single digit in a numerical field, causing input to be similar to 003.00.</p> <p><b>Resolution:</b> Formatting a numerical field is not applied until input is complete, allowing the user to enter the amount correctly as 300.00, for example.</p>
ER-5741	<p><b>Description:</b> The Welcome screen sometimes does not show saved favorite searches from sub-reconciliations.</p> <p><b>Resolution:</b> In some cases where the recon entity search screen was not overridden at the sub-reconciliation level, a user's saved favorite searches were not correctly listed on the Welcome screen. Code was altered so that overriding the recon entity search screen has no bearing on the user's Welcome screen favorites list.</p>
ER-5691	<p><b>Description:</b> De-activated sub-reconciliations cause a NullPointerException (NPE) during process execution because the system is searching for a current instance which no longer exists.</p> <p><b>Resolution:</b> Code was updated so that reconciliations no longer attempt to refer to purged data, allowing Infogix Assure notifications to be successfully sent to Infogix ER to complete the process execution.</p>
ER-5707	<p><b>Description:</b> Rich client caching issues caused a ConnectionAlreadyTerminatedError when attempting to assign a new security profile to a work owner.</p> <p><b>Resolution:</b> The caching issue was corrected by revising code to force a refresh of the cache upon login.</p>
ER-5730	<p><b>Description:</b> Field formatting for text fields was applied after each character stroke, causing input to be incorrect.</p> <p><b>Resolution:</b> Field formatting for text fields is now executed</p>



	when input is completed, resulting in correct input and formatting for text fields.
ER-5750	<b>Description:</b> When duplicating an adjustment definition, an NPE is triggered on the Java console. <b>Resolution:</b> Code was revised to catch and handle the NullPointerException gracefully.
ER-5751	<b>Description:</b> When creating a match set, selecting the "Show match set" option triggers an NPE in the console. <b>Resolution:</b> Code was revised to catch and handle the NullPointerException gracefully.

## 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.
- The parameter value for the Process Viewer refresh rate is deployed with the default value (30), regardless of configuration in the ER.properties file. (ER-5733)
- When running a saved search that includes a sorted results field, the sort is not preserved and used. (ER-5735)



## Platform Enhancements

For a complete list of supported software and hardware versions, see <http://www.infogix.com/docs/Infogix-TechSpecs.pdf>.

### Software Supported

- Velocity version 1.7 is supported.
- EJB 3.0 specifications are supported.

### Secure Value Encryption

This enhancement provides PCI compliant encryption for customer data displayed in the Infogix application or stored in the database.

Please see product release notes for more information.

### Display Product and Version Information from the Command Line

This enhancement provides the ability to view the product build and patch information from the command line interface. This eliminates the need to log in to the product to view the build details.

From the command line, navigate to the <install\_folder>/Infogix/bin directory and execute the following script:

For Windows®,

```
version.bat
```

For UNIX® or Linux®,

```
./version.sh
```

### Distribute JMS messages in a cluster

Enable the “Always activate MDBs in all servers” option in WebSphere®, to distribute JMS messages in a cluster environment. With this activation each cluster member that has a Message Driven Bean (MDB) will consume messages.

This eliminates the need to create a separate cluster explicitly for JMS messages.





## Infogix Admin Console Improvements

Infogix Admin Console has been improved to reduce the use of ClusterCommands while listing the thread and heap dumps. The thread and heap dumps are directly written to the diagnostic directory instead of a temporary directory.

## JGroups Communication Encryption

Infogix products use JGroups for cluster wide communication. Enhancements were made to encrypt the messages by using AES and RSA encryption algorithms.

## EJB 3.0 specifications are supported.

Upgrade to EJB 3.0 specs is one of the major enhancements. Some of the benefits of EJB 3.0 are listed below:

- Faster deployment on both WebSphere and JBoss® application servers.
- Improved application startup speed.
- Better performance and memory.

## 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](http://www.infogix.com/pages/products/er/infogix_er.aspx).

## Obtaining Product Updates

Be sure to check for product updates for the 4.4 release. Log on to <http://support.infogix.com> and download any applicable fix packs or patches.