infogix ER.

Release Notes | Release 4.6

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Overview

This document is intended for Infogix ER® customers who upgrade to Release 4.6. 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 4.6 release.

Adjustment Enhancements

Multi-Level Adjustment Approval Rules

The existing *Adjustment Approval Rules* have expanded functionality to allow the administrator to configure multiple levels of adjustment or entry approvals.

Each level of approval may be associated with an optional assignment, which routes the adjustment to a specific user or queue.

By default, an approval rule has a single level of approval. To add an approval level, open the rule for editing and select the new *Approval Level* stack tab. On the *Approval Level* tab, click **Add** to add an approval level. Select the approval level and click **Edit**.

On the *Assign Owner* pop up, click the user picker icon to the right of the *Assign To* field. The list of Users displays by default.

If desired, select Queue in the *Type* drop-down list. In the list, locate and select the user or queue. Click **Select**. Click **OK** to close the *Assign Owner* pop up.

You can re-arrange approval levels by selecting one and clicking **Move Up** or **Move Down**. Selecting an existing level and clicking **Remove** deletes the level.

Add additional approval levels if needed. When the rule is complete, click **OK** to close the *Adjustment Approval Rule* editor and save the adjustment definition.

Adjustment Entry Upload File

In this release of Infogix ER, new functionality has been added to allow the upload of adjustment entries via an ANSI or UTF-8 encoded comma-separated values (CSV) file.

If enabled, an adjustment file upload is initiated on the adjustment panel by clicking the **Upload** button. The **Upload** button must be enabled by the administrator prior to deployment.

There are several possible configurations for the upload file, depending up on the business needs. Options include:

- inclusion or exclusion of adjustment data

- inclusion or exclusion of an adjustment header

- inclusion or exclusion of an entry header

- data upload for editable fields only or upload of field data for all fields (editable and non-editable)

- a total entry upload limit (per adjustment) that is configurable from 1 to 1000 entries

Some of the configurations may be overridden for individual adjustment definitions. The properties that may be overridden are:

- ADJ_UPLOAD_HAS_ADJUSTMENT_DATA

- ADJ_UPLOAD_ADJUSTMENT_DATA_HAS_HEADER

- ADJ_UPLOAD_ADJENTRY_HAS_HEADER

To override one of these properties for a specific adjustment, add the property prefixed by the adjustment definition ID to the Infogix/component/adjustments/conf/adjustments.properties file prior to deployment. For example:

```
<ADJID>_ADJ_UPLOAD_ADJUSTMENT_DATA_HAS_HEADER=true
```

For details on the configuration of parameters, refer to *the Infogix Properties Guide*.

General Enhancements

Java 8 Support

This version of Infogix ER supports use of Java SE Runtime Environment 8 for the client.

Item Duplication

Users can now duplicate items via the Duplicate button on the Recon Entity detail screen. This button's functionality is equivalent to the Duplicate button on the Item search screen.

Confirmation Prompt on Close

Configuration of a new parameter allows the administrator to enable a confirmation prompt to users when they attempt to close items. The prompt is disabled (false) by default and may be enabled prior to deployment by setting the CONFIRM_MANUAL_RECON_ITEM_CLOSE parameter to true.

Log in Optimizations

Optimizations in the login code were undertaken to make the total login time faster for end users. Based on testing results, users may expect logins that are roughly 30% faster than past versions of Infogix ER.

NOTE: The total time it takes to log in is highly variable, and dependent upon numerous factors, including environment specifications, network configuration, and the number of rules. It is expected that the first login for a user will be slightly longer than subsequent logins due to the amount of data that must be downloaded. Administrative users will generally see the same login performance.

Default Proxy Configuration

In environments which use a proxy for login to the rich client, administrators can now configure the default proxy connection information, including hostname and port.

To use this feature, the RICH_CLIENT_USE_PROXY parameter must be set to true (it is false by default) and the hostname and port parameters must be configured prior to deployment.

Change Logs for Upgrading to Infogix ER 4.6

This section summarizes any changes that might affect customers who are upgrading from Infogix ER 4.5 to Infogix ER 4.6.

For instructions on upgrading from a previous version of Infogix ER to Infogix ER 4.6, please refer to the *Infogix Server Upgrade Guide*.

Java Change Log

When upgrading from Infogix ER 4.5 to Infogix ER 4.6 there were **no changes** made for Java support.

Application Server Properties Change Log

JBoss Application Server

When upgrading from Infogix ER 4.5 to Infogix ER 4.6, there were **no changes** made to the properties files for the JBoss application server.

WebSphere Application Server

When upgrading from Infogix ER 4.5 to Infogix ER 4.6, the following property **was added** to the advanced application server properties file for all deployment types:

Property	Description
WEBSPHERE_SESSION_SECURITY_ENABLED	Setting for WebSphere Session Security; default is true.

Database Properties Change Log

When upgrading from Infogix ER 4.5 to Infogix ER 4.6, the following property **was removed** from both the Oracle and Microsoft SQL Server advanced database properties files.

Property	Description
DATABASE_CLIENT_HOME	Property removed.

LDAP Server Change Log

When upgrading from Infogix ER 4.5 to Infogix ER 4.6, there were **no changes** made 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
- OpenDS

An Infogix Platform enhancement in this version supports use of a Federated Directory.

New Components in ER.properties

When upgrading from Infogix ER 4.5 to Infogix ER 4.6, the following properties **were added** to the Infogix ER properties file.

Property	Description
RICH_CLIENT_USE_PROXY	Enables use of pre-configured proxy connection information if set to true; default is false.
RICH_CLIENT_DEFAULT_PROXY_ HOST_NAME	Hostname of the proxy server.
RICH_CLIENT_DEFAULT_PROXY_PORT	Port number of the proxy server.
CONFIRM_MANUAL_RECON_ITEM_CLOSE	If true, enables display of an item close confirmation box to the user; default is false.

To enable and configure the behavior of the adjustment entry upload file functionality, the following properties were added to the Infogix ER properties file.

Property	Description
SHOW_ADJ_UPLOAD_BUTTON	If enabled (true), displays the Upload button on the adjustment panel; default is false.
ADJ_UPLOAD_HAS_ADJUSTMENT_DATA	If enabled (true), indicates the adjustment entry upload file contains adjustment field data; default is false.
ADJ_UPLOAD_ADJUSTMENT_DATA_ HAS_HEADER	If enabled (true), indicates the adjustment entry upload file contains adjustment header fields; default is false. For this parameter to apply, the parameter ADJ_UPLOAD_HAS_ADJUSTMENT_DATA must also be true.
ADJ_UPLOAD_ADJENTRY_HAS_HEADER	If enabled (true), indicates the adjustment entry upload file contains entry header fields; default is false.
ADJ_UPLOAD_FILE_ENCODING	Encoding for adjustment upload file; common supported encodings include ANSI (default) and UTF-8.
ADJ_UPLOAD_FILE_LINE_DELIMITER	Indicates the line delimiter for the adjustment entry upload file. Common supported delimiters include CRLF (default), CR, and LF.
ADJ_UPLOAD_FILE_FIELD_DELIMITER	Indicates the field delimiter for the adjustment entry upload file. Common supported delimiters include COMMA (default) and TAB.

Property	Description
ADJ_UPLOAD_ENTRY_LIMIT	Sets the maximum number of entries that may be uploaded per adjustment. This limit applies to entries uploaded per adjustment, not per file, so multiple files may be uploaded if the total number of entries is under the limit. Default limit is 500; maximum limit is 1000. Setting the limit to 0 essentially disables entry upload functionality.
ADJ_UPLOAD_EDITABLE_FIELDS_ONLY	If enabled (true), allows only values for editable fields to be uploaded. Default is false, which allows upload of field data for both editable and non-editable fields.

Fixed in this Release

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

JIRA	Details
ER-5802	Character set formatting for editable adjustment text fields broken.
ER-5793	Added Duplicate Item button on the Recon Entities Detail screen.
ER-5768	The Help button missing from the Add Attachment screen.
ER-5766	Saving an adjustment definition caused an NPE because of a discrepancy in synchronization upon import.
ER-5761	The valid_calendar_day function is not available in the editing pop up
ER-5762	Import of a recon definition with one sub-recon over an existing reconciliation with two levels of sub-recons does not delete the extra sub-recon.
ER-5765	Code optimization to make the total rich client log in time faster.
ER-5759	Sorting the Action Availability Rules prior to opening the edit screen results in the edit screen for the wrong rule displaying.
ER-5823	The matching screen in QMatch mode does not display on a Match action when the chosen items are in balance, but do not meet any matching rule.
ER-5836	The Recon Entity Detail screen allows an item's system fields to be editable.
ER-5835	The Item Detail screen displays the item's side indicator value, not the interpreted value as configured on the Item Rules tab.
ER-5842	When editing a field of a text datatype that is used as the linked source for the Item Side Indicator field value, after typing each character, the character is selected, causing the user to have to move the cursor to the next position to type the next character.
ER-5841	If a number datatype field is linked to another field, when updating the source field, the field loses focus for after each digit is entered and the focus transferred to the linked field.

ER-5848	Static system fields change names after changes to the model definition.
ER-5847	In a reconciliation Item Detail UI definition in the Match Set Attribute Group, an "Add Field" action can allow adding certain fields to the UI twice.
ER-5846	"Edit Display" is not functional on overridden sub-recon screens.
ER-5844	The Recon Entity Detail system fields are showing twice in the UI definition.
ER-5843	Prevent editing of the Item Side Indicator field that is linked as a target to any text field.
ER-5840	Closing an item from the Item Detail screen throws and NPE in the console.
ER-5791	Adjustment fields in the adjustment panel should be disabled by default if there are no entries in the adjustment.
ER-5752	When an item's amount has no cents in the value, the number displayed in the Quick Match has incorrect formatting.

Known Infogix ER 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)

- The size and location of the Rules UI Definition Preview window is not saved when the UI Definition is saved. (ER-5219)

- When running a saved search that includes a sorted results field, the sort is not preserved and used. (ER-5735)

- The Adjustment UI Definitions sometimes inserts non-viewable blank line in the Adjustment Attributed Group heading of the Entry Search tab. (ER-5831)

- On a reconciliation definition import, the Cancel button remains highlighted even after clicking Import. (ER-5262)

- The work owners screen allows the input of the special character dollar sign ($) in the ID field during work owner creation. (ER-5232)

- In creating a work owner, tabbing to a field does not allow Ctrl-V to paste content. (ER-4948)

- A Letter field with a default value does not populate correctly to an Adjustment field via Workflow Rules. (ER-5673)

- For Cash Differences, the Teller screen fields First Name and Last Name require all capitals, resulting in zero results if a user enters lower case letters in the search criteria. (ER-4846)

- Clicking a result in the Rules Catalog search results opens the definition's general stack tab, not the specific tab on which the rule is configured. (ER-5149)

- When search in the Rules Catalog, sorting columns, then clicking Search again sets all columns back to the default order. (ER-5052)

- On the Adjustment Definition for the Entry Search screen, a blank entry is sometimes inserted Adjustment Attributes Group; this is not visible on the UI, but cannot be removed. (ER-5831)

- Asterisk is missing for some of required fields. (ER-5780)

- Some fields on search screens can become misaligned. ER-5738/5737)

- In Cash Differences, occasionally a blank space in UI definition shows up as a "mini" field. (ER-5734)

Platform Improvements

This section summarizes changes to supported software, new features, and improvements for this release.

Software Supported

For a complete list of supported software and hardware versions, see

http://www.infogix.com/docs/Infogix-TechSpecs.pdf

Infogix Administrative Console Improvements

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:

- To reduce clutter on the screen, System Processes such as Results Action Rule Process, Search Indexing Process, and Retention Process information are no longer displayed by default. Users can add those processes to the display by selecting "Include System Processes" option in the Filter criteria.

- Users have the ability to view Control Point execution logs by double clicking the bar. Now, administrators will have the ability to view updated logs from a long running control point by clicking "Refresh" without having the need to close and re-open.

- Users now have the ability to stop a process gracefully. Double click the running process, and select "Stop Process" to stop the process. This eliminates the need to kill a process forcefully from the operating system, or by shutting down the server.

Event Subscription Management

Infogix products use event subscriptions for internal and cross product communication. The Event Subscription management functionality adds the ability to correct an incorrect remote event configuration. Common errors include an incorrect remote host or port number that prevents the delivery of remote events. For example, an incorrect listener property can prevent Infogix Insight and Infogix Perceive from receiving Infogix Assure events.

Users can now view and update the connection properties when the hostnames are changed, or when the product is deployed on a new host.

Warning: Any changes to event subscription details can result in undesirable product functionality and loss of data. Do not make any changes unless advised by Infogix Customer Support.

Enhancements to Embedded Directory Deployments

Infogix supports product deployments using an Embedded Directory, where the management of users accessing the products is managed within the product.

Several security, audit, and reporting enhancements have been added to Embedded Directory deployments in this release.

Password Security and Complexity

Password and Account lockout policies determine the strength of the passwords and control when the accounts are locked out of Infogix products.

Embedded directory users can now configure their site-specific Password Complexity, Maximum password age, Enforce password history, Force password change after first use, and Account lockout policies.

Please see *Embedded Directory Properties* section, in the *Infogix Properties Guide* for more information.

Audit Logging

For embedded directory deployments only, failed login attempts are now logged in the audit logs. The log message includes timestamp, name of the affected data and system component, and the identity of the user affecting the modification.

User Access Reports

For embedded directory deployments only, an administrator or a super user can generate a report that shows a list of users that can access the product. The

report includes user attributes such as name, email/pager information, Roles, last login, and last password changed information.

OWASP Encoder

The Platform now uses the OWASP Encoder to defend against Cross-Site Scripting attacks.

User input is encoded with the OWASP Encoder to prevent the execution of a malicious script.

More information can be found at https://www.owasp.org/index.php/OWASP_Java_Encoder_Project

Known Platform Issues

The following are known issues in Infogix Platform:

- Importing a calendar in the web-based interface causes a Java ClassNotFoundException in Infogix ER. Infogix ER users must use the rich client as instructed in the documentation to create, import, export, and modify all calendars.

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 by logging on to http://support.infogix.com to download any applicable fix packs or patches.