



# Infogix ER<sup>®</sup>

Release Notes  
Release 9.2



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# What's New

This section summarizes enhancements for the Infogix ER 9.2 release.

## Communication Center Enhancements

Several Communication Center enhancements are included in this release. The following sections provide details about application changes.

### Auto Notify Rules ID

Auto Notification Rules have a new Rule ID column in the rules table. This field is numeric and the ID assigned to a rule never changes when rules are added, deleted, or moved, making it easier to reference and identify rules by ID.

For existing rules, the system automatically assigns Rule IDs; no migration or administrative intervention is required.

### Auto Notify Rules Excel Export

In this release, the Auto Notification Rules can now be exported to a Microsoft Excel file. This allows business users to more easily communicate with team members and meet audit requirements.

The Excel column headers are the same as those in the UI table headings, and are given in the same order.

### Display Recipient If Condition in Rules Table

Another addition to the Auto Notification Rules UI is the inclusion of a new column in the rules table that displays the If Condition for Recipients for each Escalation Level.

In previous versions, the Recipient for each Escalation Level was displayed, but the If Condition was not shown. This If Condition data is included in Excel exports as well.

### Activity Logging for Templates and Rules

Additional activity logging that tracks usage of Email Templates and Auto Notify Rules has been added in this version.

For manual emails, the Email Template ID has been added to Activity Log details.

For Auto Notification emails, the Email Template, Auto Notify Definition, and Rule IDs have been added to Activity Log details. Note that Auto Notification emails can be merged (resulting in the inclusion of multiple Rule IDs).

This enhancement makes it easier for the administrator to audit and report on the usage of Email Templates and Auto Notify Rules.

## Auto Notify Rules Display for Source Mappings

In this release, for each Source Mapping in an Auto Notify Rule, the Source Filter conditions display in the Rules table. Conditions are also included in Excel exports for Auto Notify Rules.

## Enhanced Email Look Up Listing

In the previous release, the email look-up functionality for manual emails returned a list of User IDs only; this was because the LDAP directory look-up did not return the User Name and Email attributes.

In this release, an enhancement to the LDAP user listing allows email look-up functionality to fetch and display the user's Display Name and Email address. This enhancement affects email auto-completion and the address book. For auto-completion, results now display as `User Name <user_email>`; for the address book, the Name and Email Address columns display for returned data.

## Default Recipients for Auto Notify Rules

At times, an Auto Notify Rule may fail to provide a valid email recipient. When this occurred in previous releases, the rule failed.

In this release, a new system default recipient may be configured in the `AUTONOTIFY_DEFAULT_RECIPIENT` parameter, which has been added to the `ER.properties` configuration file.

The default recipient receives any email notifications that would have otherwise failed due to an inability to locate a valid email recipient. In addition, the rule that triggered the default recipient email is logged, as is the email, and the administrator is notified via email notification as configured for application process failures.

## Configurable Max Length for Manual Email to Address Field

In earlier versions, the *To* and *Cc* address fields on manual email forms had a maximum default input length of 255 characters.

With this release, the maximum length for the *To* and *Cc* fields is configurable. Configuration is done via a new property (`EMAIL_RECIPIENT_LIST_MAX_LENGTH`), found in the `ER.properties` file.

The default value for this property is 255, allowing backward compatibility and no functional change for customers that do not wish to alter the default.

## Configurable Email Body Read Size Limit

To protect the system and end users from encountering resource problems caused by huge emails that might have been generated by mistake, this release includes a configurable option



to limit the reading and display of very large email bodies.

The new configuration parameter, `EMAIL_BODY_READING_CHARACTER_LIMIT`, sets a limit on the number of characters that are read and assembled in the email body content.

If the configured limit is set to a number greater than zero, the system sums the total length of the email body content stored in the database before actually reading it into memory. If the email body length exceeds the configured limit, the system skips reading / displaying the email body, instead returning a standard system-generated body content that says "The email body size exceeded the system limit and will not be displayed."

### **Line Formatting for Manual Emails and Responses**

Line and space formatting in user comments were previously ignored by the browser when viewing manual emails and response comments. To preserve email line formatting, content has been formatted for HTML display in this release. This allows users to preserve line breaks in their response comments and manual emails.

This enhancement only applies to new emails and responses; existing emails and responses are not changed by this functionality.

### **Enhanced Error Isolation for Auto Notify Rules**

Auto Notification rules are executed with more error isolation in this release.

Failed rules are logged and notification sent to the administrator; however, a failed rule does not stop execution of other rules, allowing more rules to be completed successfully.

### **Improve Manual Recon Email Template Evaluation Performance For 1000+ Items**

Previously, when the number of selected items for a manual email was very large (1000 items or more), the manual template evaluation timing was often lengthy. In testing scenarios, timing varied from 20 seconds to 15 minutes, and depending upon network connection speed and size of items.

To improve evaluation performance and reduce the total time required, the implementation was optimized. In subsequent test scenarios, timing improved remarkably and consistently took under 15 seconds, even for very large data sets (about 2000 items).

## **General Enhancements**

### **User Profiles Management Activity Logging**

In this release, the system logs to activity taken on user profiles, including:

- Who, What, When
- Create and Update activities

- Before and After values for User Profile attributes

## **Validation for Work Owner Display Names**

Validations for work owner display names in work owner management UI have been added in this version.

Validations include a check for unique display names when a work owner is added or updated. The display name also cannot contain leading or trailing white space or validation will fail. Invalid display names are rejected and the UI displays an error messages on the cause of validation failure.

## **Productivity Enhancements**

### **Results Table Calculation**

A simple calculator for numeric columns in selected results has been added to this version. Much like QMatch functionality, the Results Calculator can save end users time in research and matching activities.

The Results Calculator is enabled by a toggle button; when enabled, recalculations occur automatically when upon selection change. No additional match / edit / work owner permissions are required to use the calculator, just item read permissions.

In this release, Results Calculator functionality is developed for only the Item Search and Recon Entity Search screens. When QMatch is in use, the Results Calculator is disabled. Likewise, when the Results Calculator is enabled, QMatch is disabled.

When user enables the Results Calculator, they are prompted to make a selection. Available calculations for the selection include Null, Count, Sum, Min, Max, Mean, and Unique Count. Results are presented with the same number formatting as input columns and results are displayed on the status bar at the bottom of screen.

### **Auto Maximize Data Screens**

To save user clicks, a new configurable parameter to specify data screens be opened at maximum size has been added in this release. This functionality applies to all Search and Detail screens in the Reconciliation, Adjustment, and Cash Differences components.

The new parameter, RICH\_CLIENT\_MAXIMIZE\_DATA\_SCREEN, is located in the ER.properties file and is set to false by default.

### **Email Format for Text Fields**

In many cases, Reconcilers may manually enter one or more email addresses into text fields; the text fields are then mapped to specific auto notification rules, where email addresses are



used in the recipient list.

Manual entry is tedious and error prone, often leading to Auto Notification processing errors. To help avoid this, a new email format is now available for text fields.

This new specification allows the system to enable validation and auto completion for text fields with the email format. This helps reduce email entry error and improves speed for user entries.

The administrator configures a text fields with the email format in the User Interface definition. This format is available only in the Reconciliation component.

When a text field with email format is editable, the system provides auto complete list that looks up emails from LDAP directory based on user character entry, the same as with manual email auto completion. The system also validates text entered for email syntax, rejecting invalid entries. Note that the text field with email formatting may be Null or empty.

### **Email Link in Activity Log View**

The email object link is now displayed in the Activity Log, allowing the email object to be opened from the UI.

### **Email Listing Performance Optimization**

When listing a large number of emails on the screen, the application now avoids retrieving email body content and attachments for all emails upfront, reducing memory and bandwidth usages.

## **Technology Upgrades**

### **GUI Toolkit Upgrades**

In this release, some of the third-party GUI toolkits used in the application were updated.

### **Libraries Upgraded**

In this release, several third-party libraries have been updated. These updates increase system security and reliability.

### **Rich Client Java 10 Support**

The Infogix ER rich client now supports use of Java 10.

### **Replacement of Struts Web Application Framework**

The Struts Web Application Framework was removed and replaced by Spring Web Application Framework.

# Change Logs for Upgrading to Infogix ER 9.2

This section summarizes changes that might affect customers who are upgrading from Infogix ER 9.1 to Infogix ER 9.2. For instructions on upgrading from a previous version of Infogix ER to Infogix ER 9.2, please refer to the *Infogix Server Upgrade Guide*.

## Java Change Log

When upgrading from Infogix ER 9.1 to Infogix ER 9.2, the following changes were made for Java support:

- The rich client now supports Java 10.

## Application Server Properties Change Log

### Wildfly Application Server

When upgrading from Infogix ER 9.1 to Infogix ER 9.2, there were no changes made for the Wildfly `appserver.properties` file. The `appserver.advanced.properties` file had the following changes:

| Property         | Description                                                                                        |
|------------------|----------------------------------------------------------------------------------------------------|
| HIDE_STACK_TRACE | Specified whether to show or hide the stack trace; this property applies to Infogix Perceive only. |

### WebSphere Application Server

When upgrading from Infogix ER 9.1 to Infogix ER 9.2, there were no changes made for the WebSphere `appserver.properties` file. The `appserver.advanced.properties` file had the following changes:

| Property         | Description                                                                                        |
|------------------|----------------------------------------------------------------------------------------------------|
| HIDE_STACK_TRACE | Specified whether to show or hide the stack trace; this property applies to Infogix Perceive only. |

## Database Properties Change Log

When upgrading from Infogix ER 9.1 to 9.2, there were no changes to Oracle® or Microsoft SQL Server database properties files.

## LDAP Server Change Log

When upgrading from Infogix ER 9.1 to 9.2, there were no changes made to any of the LDAP

property files.

## ER.properties File Change Log

When upgrading from Infogix ER 9.1 to Infogix 9.2, the following properties were added to the Infogix ER properties file:

| Property                           | Description                                                                                                                      |
|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| RICH_CLIENT_MAXIMIZE_DATA_SCREEN   | Specifies whether or not to maximize data screens when opened; default is false.                                                 |
| AUTONOTIFY_DEFAULT_RECIPIENT       | Specifies a system-wide default recipient for Auto Notify rules that fail to return any valid recipient.                         |
| EMAIL_RECIPIENT_LIST_MAX_LENGTH    | Specifies the length of the email address field; default is 255.                                                                 |
| EMAIL_BODY_READING_CHARACTER_LIMIT | Specifies a character limit when the system reads and assembles the email body; default is 5120000, which is approximately 5 MB. |

## Fixed in this Release

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

| JIRA    | Details                                                                                                                                                                                      |
|---------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ER-6997 | Defect: The Offset field is not displayed in Rules Catalog Rules UI Definition.                                                                                                              |
| ER-7010 | Defect: User is able to view Cash Differences from the Owned Work Items tab for the Welcome page after the CD module License has expired.                                                    |
| ER-7013 | Defect: Attachments from email responses not associated with the source item. Attachments were saved with email responses, but should also be associated with the corresponding source item. |
| ER-7057 | Defect: Manual email recipient validation error message needs to be updated to reflect the separator as configured in the EMAIL_RECIPIENT_SEPARATOR parameter.                               |

|         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|---------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ER-7070 | Defect: For manual emails, the Check Names option overrode existing email recipients.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| ER-7072 | Defect: In the Communication Center for Templates, if the Email Templates header was inadvertently selected when exporting templates, the application triggered a NullPointerException (NPE).                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| ER-7073 | Defect: In the Communication Center for Auto Notification Rules, if the Auto Notify Type header was inadvertently selected when exporting rules, the application triggered a NullPointerException (NPE).                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| ER-7074 | Defect: In the Communication Center for Data Models, after importing a data model definition, the Modified field value for the definition was not updating correctly.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| ER-7075 | Defect: In the Communication Center for Email Templates, after importing a template definition, the Modified field value for the definition was not updating correctly.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| ER-7090 | Defect: The Auto Notification process failed when the process failed to generate more than 1000 emails for a specific source. The root cause was a limiting repeat restriction.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| ER-7091 | Defect: The Auto Notification process logs the rule number processed to the IGX log. For example, a log entry might appear as: Processing <Auto Notify Def ID> Rule #1 Source : <Source> [sourceType=Reconciliation Recon Entity, sourceId='<Source ID>'].<br>When there are multiple sources in a rule, the rule number logged is incremented for each source. As a result, the rule number in the log does not match that shown on the definition UI, making it difficult to correlate the rules processed from the log entries. This change requires the rule number logged must always correlate with the rule number displayed on the Auto Notify Rules UI. |
| ER=7113 | Defect: In the View Email screen, if an existing email was selected when a user clicked New to create a new email, the CC field and email body were populated from existing values in the selected email. The expectation is any new email fields should be empty.                                                                                                                                                                                                                                                                                                                                                                                               |
| ER-7115 | Defect: The Attachment Name length for Manual emails was not validated against the Attachment database table column size limit, resulting in users being able to attach files with names exceeding the name column limit. This caused a persistence error, but the email was sent successfully.                                                                                                                                                                                                                                                                                                                                                                  |

|         |                                                                                                                                                                                                                                                                                                                                                 |
|---------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ER-7121 | Defect: If an attachment file name is over 80 characters, the user gets a UI error and the email is not logged; however, the email is sent and the recipient gets the email, despite the error. Logging was improved to specifically describe this event and now the log includes the message: Persistence Error Occurred After email was sent. |
| ER-7124 | Defect: Email response page doesn't handle non-ASCII text correctly.                                                                                                                                                                                                                                                                            |
| ER-7132 | Defect: On manual emails, the Forward button is enabled when there is no email to forward; clicking Forward results in a NullPointerException (NPE).                                                                                                                                                                                            |
| ER-7134 | Defect: If there are no existing Auto Notification definitions, the Data Model list does not always get populated correctly for a new Auto Notification Rule; there are no errors in the log or console.                                                                                                                                        |
| ER-7145 | Defect: When there are no existing templates, cancelling the creation of a new template definition causes a NullPointerException (NPE).                                                                                                                                                                                                         |

## Known Infogix ER Issues

This section describes known issues.

- 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)
- 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.

## New Software Supported

- Microsoft® SQL Server® 2017 is supported.
- Java® 10 is supported

For a complete list of supported software and hardware versions, see <http://www.infogix.com/resource/infogix-technical-specifications/>

## Java 10 Support

Java 10 is supported for WildFly 10.1.0 Application Server. To use Java 10, edit `setup.bat` (for Windows®) or `setup.sh` (for UNIX® or Linux®) in `<install_folder>/Infogix/etc` folder and specify the full path of Java 10 home directory.

## Library Updates

In this release, several third-party libraries have been updated. These updates increase system security and reliability.

## Configuration Validation Improvements

During the product deployment process, the script `validate-config-values.bat` (.sh) is run to validate the values specified in the properties files. This script, rewritten in Groovy, has been enhanced to provide better troubleshooting information to the user if the configuration validation fails.

From the `<install_folder>/Infogix/bin` directory, execute the following command:

For Windows:

```
validate-config-values.bat -c <myConfigName> -v <product>
```

For UNIX or Linux:

```
./validate-config-values.sh -c <myConfigName> -v <product>
```

Where:

- `<product>` represents the Infogix application
- `<myConfigName>` is the name of your configuration:
  - For Infogix Assure, specify `IA`.
  - For Infogix ER, specify `ER`.
  - For Infogix Insight, specify `II`.
  - For Infogix Perceive, specify `IV`.
- `-v` enables the verbose output option

## Java 7 is no longer supported

Infogix products on release 9.1 and later support only Java 8 version.

## Fixed in this Release

The following issues have been fixed in this release.

| JIRA    | Details                                                                                                                                                                                                                                                                                                                                                               |
|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| IP-2159 | A better error message is displayed when a user tries to delete a system calendar.                                                                                                                                                                                                                                                                                    |
| IP-2507 | The Security Profile and Profile Group name fields allowed the user to copy and paste illegal characters into the field, even though it correctly rejects illegal characters when they are typed by the user.                                                                                                                                                         |
| IP-4726 | The validate-config-values script, now rewritten in Groovy, provides better information when the validation fails.                                                                                                                                                                                                                                                    |
| IP-4744 | Upgrade the Apache HTTP Client.                                                                                                                                                                                                                                                                                                                                       |
| IP-4778 | Improved error messaging when a user who is adding users to the system reaches the maximum number of displayed users and groups. The existing error is confusing because it implies the maximum total number of users / groups was reached instead of the display maximum.                                                                                            |
| IP-4781 | A new property, HIDE_STACK_TRACE, was added to enable / disable the ability to hide or display stack trace errors In Infogix Perceive. Default value is false.                                                                                                                                                                                                        |
| IP-4813 | Support JDK 1.8.0_171 and later with the WildFly Vault.                                                                                                                                                                                                                                                                                                               |
| IP-4825 | Fix failed validation and database populate when using SQL Server 2017 on Linux platforms. This issue occurred due to platform-specific forward slashes required on Linux systems. Our validation code specified that double backslashes be used in the TABLESPACE_DATAFILE_DIR parameter; backslashes do not translate to a file directory on Linux, but a filename. |
| IP-4836 | The Admin Console was upgraded from Struts Web Application                                                                                                                                                                                                                                                                                                            |

|         |                                                                                                                                                                                  |
|---------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|         | Framework to Spring Web Application Framework.                                                                                                                                   |
| IP-4902 | Add a verbose option to the validate-config-values script to provide output for validation issues. Example usage: <code>validate-config-values.sh -v &lt;product_code&gt;</code> |
| IP-4905 | <p>The web service plugins work correctly in Infogix ER, when deployed in WildFly with JDK 10.</p> <p>This feature is available in Infogix ER only.</p>                          |
| IP-4836 | The Struts Web Application Framework was removed and replaced with the Spring Web Application Framework.                                                                         |



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If you are experiencing issues contacting us by phone or by our website, please email support at [support@infogix.com](mailto:support@infogix.com)

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Date of issue: December 1, 2018