BackOffice Associates® Solutions

Release Notes

Version 6.5

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Introduction

This document describes the new features, enhancements and resolved issues included in the 6.5 version of BackOffice Associates® Solutions.

NOTE: DSP™ version 6.5 implements a new licensing scheme that ties the license key to a hardware ID specific to the application server on which DSP™ is installed. This license key will therefore not work on other machines. In addition, hardware changes to the server, including virtual machine reconfiguration, may cause the license to be invalidated. In the event of a hardware change, server move, or other action that may require a new license to be issued, please open a support ticket at http://support.boaweb.com to request a new license. The request for a new license should be made a minimum of 2 business days before the license is needed to allow time for review and approval.

NOTE: A 6.4 version of BackOffice Associates® Solutions was not released. The immediately prior release to 6.5 was version 6.3.1.

New Features

dspGovern™

dspGovern™ provides an Application Data Management solution for governing data business processes across heterogeneous applications and infrastructures.

dspGovern™ provides the ability to design, execute, and monitor business processes within an organization as they relate to the creation and maintenance of data within the enterprise architecture of an organization. A Designer creates the governance elements hierarchy, where tasks, roles, scenarios, business processes and their dependencies are defined.

dspGovern™ enables users to manage the creation of master data. Master data is collected, validated, reviewed, approved and posted through a request process that dspGovern™ provides. A request is comprised of tasks, roles, and scenarios within a business processes. The processes are grouped by category (e.g., Material, Customer, Vendor.) Users of dspGovern™ can create their own custom applications and request pages for any object necessary. The Content WebApp is registered at the category level within dspGovern™.

- A task is a Content WebApp page designed to collect and validate information required to support the business process. Not all pages are tasks as some pages can be navigated to as child pages from the main task page header. Tasks and pages can be enabled to use Microsoft Excel Interoperability so that they can create or update data for the tasks within Excel. Refer to “Excel Integration” in the online help for more information.
- A role is a collection of tasks and a unit of security where an individual or groups of individuals perform their duties during a step or role within the workflow of the business process.
- A scenario is a collection of roles that outlines a single sub-process that can either be an entire business process on its own or just a step within that business process, containing its own dependencies. For example, a user can create a Basic Data for a Finished Good scenario, while other scenarios within the business process can be created to extend that same material to plants or sales organizations.
- A business process is a compilation of scenarios that allows a series of linked scenarios to be created.

- A category is a collection of the tasks, roles, scenarios and business process governance elements and is created to organize the elements by the category (for example, line of business, business unit or division, or data domain).

Security setup in dspGovern™ uses positions, which are security templates defined by a Security Administrator, to which multiple users can be assigned. With positions, a Security Administrator can create a template for security once and assign multiple users to the template as needed. The position security set up is used to establish security for users in the Content WebApp.

Content WebApps use the governance elements and security setup from dspGovern™ to manage the process of coordinating data collection, validating the data and posting information. dspGovern™ also provides the ability to ensure that only resources that have been explicitly given access can create, read, update and delete data.

dspGovern™ supports mass change data to be posted via Integrate, a BackOffice Associates® component used as the posting mechanism and script repository. Refer to "Integrate" in the online help for more information.

Documents can be attached to governance elements to provide instructions and supporting documentation that communicates information to users of the governance process about how to work with certain elements. Refer to "Upload and Download Element Documentation" in the online help for more information.

A dashboard is available in dspGovern™ with charts that show metrics for velocity and efficiency in roles processing. Refer to "View Charts in dspGovern™ in the online help for more information.

dspMigrate™

AutoGen

- A source table and rules can be autogenerated for an Update Row source. Refer to "Build an Update Row Source Table Using SQL Automation" and "Create Rules for an Update Row Source Using SQL Automation" in the online help for more information.
- The AutoGen level can be set on the *Vertical* View of the *Automation* page, and controls how tables, views and stored procedures are generated. Full or partial automation can be configured at the target level. Refer to "Set the Auto Gen Level for a Target" in the online help for more information.

Map

A user can profile a source data source on the *Vertical* View of the *Target Sources* page or an Update Row source data source on the *Vertical* View of the *Target Sources (Update Row)* page. Once the profile has run, the user can view the profile results such as record counts, unique values, or field data types.

Target Design

A new Visibility column has been added for both Natural and Utility fields. Setting the visibility determines whether a field is available to be mapped on the source or target pages. Refer to "Set Visibility for Mapping of Target and Source Fields" and "Set Visibility for Appended Utility Columns" in the online help for more information.

Data Stewardship Platform (DSP™)

Common

- Target system connections and the user credentials for these connections are now set in Common. Refer to "Establish a Connection to a Target System" in the online help for more information.

NOTE: This feature replaces Back End Authentication that was previously established in Integrate and dspCompose™.

- An administrator can import a system type from any system. The user can add a system type using that system's data dictionary to create a System Type Model with the correct SQL. The process imports table descriptions, field descriptions and registers check tables to fields. Refer to "Import a Data Source" for more information.

NOTE: The SAP and JDE system types are included with the DSP™.

- Profiling and duplicate detection have been added.

Integrate

- A user can configure After Post rules that run after the process template executes successfully and before the next process template begins processing (if posting with a multi-template process). After a process template that has an After Post rule registered posts successfully, the data is passed to the next dependent process template as an input parameter. Refer to "Register After Post Rules to a Process Template" in the online help for more information.
- The SAP Data Services Job template type has been added to Integrate. It uses a Data Services Job (consisting of a Data Services Repository and a job name) when posting request data to a target system. Refer to "Post Data Using an SAP Data Services Job" in online help for more information.
- A user can add a Custom template in Integrate for posting to any application. Refer to "Post Data Using a Custom Template" in the online help for more information.

dspCompose™

A user can access the black **dspCompose Requests** tab on the Quick Panel to navigate among active requests for which the logged in user has access. Refer to "Use the dspCompose Requests Tab for Quick Access to Request Details" in the online help for more information.

Enhancements

dspMigrate™

AutoGen

- Rule Status can be updated in SQL AutoGen. Refer to "Update a Rule Status in SQL AutoGen" in the online help for more information.
- A Developer can now reject a mapping on the *Automation SQL Field Mappings* page. Refer to "Reject a Mapping in SQL AutoGen" in the online help for more information.
- In SQL AutoGen, the Migration Developer can view transaction status for objects. Refer to "View SQL AutoGen Transaction Status" in the online help for more information.

- In SQL AutoGen, a user can create all source tables, Update Row source tables, and rules at one time by clicking the Create All Objects icon on the *Automation* page.

Console

- A Migration Developer can set the data sources at the wave-process area level, which cascade through all objects in the process area. Refer to "Set the Data Source at the Wave-Process Area Level" in the online help for more information.
- A user can now use multiple target systems for a wave-process area. A system set at this level cascades through all objects in the wave-process area. Refer to "Add Multiple Target Systems at the Wave-Process Area Level" in the online help for more information.

Map

- In Value Mapping, when refreshing the target values, a warning displays if the language or client fields are entered for the lookup table but the language or client value fields are not populated for the wave. These fields are maintained on the *Waves* page's *Vertical* View in Console.
- A Migration Developer can designate a system other than the target system for check tables. Refer to "Use Check Tables from Different Systems While Value Mapping" in the online help for more information.
- The process for establishing relationships has been updated. External sources, Add Row sources (formerly primary sources), and Update Row sources (formerly secondary sources) can now be used when creating relationships. Refer to "Work with Sources" in the online help for more information.
- The Submit All icon on the *Field Mappings* page can be used to submit any mappings with a Mapping Status of In Progress and any mappings with a Mapping Status of Complete (if that Mapping Status was set manually by the user but had not yet been submitted.)
- In Map, on the *Mapping Approval* page, a user can click the Complete icon to approve the selected mapping(s) and set the Rule Status to Complete.
- In Map, Mapping Status and Rule Status values and the Mapping Approval process have been updated. During the Mapping Approval process, the Mapper submits a mapping for review. When submitted, the mapping status is set to Complete. The Developer can approve the mapping, which sets the Rule Status to In Progress. The Developer can also select an option to set the Rule Status to Complete when approving a mapping.

Mapping Status values are:

- **Pending Review** – The default value indicates that a mapping has been either:
  - Synced with Target Design but work on the mapping has not begun.
  - Synced with Target Design, has been worked on, but the saved changes did not pass validations.
  - Reset by a Mapper or a Developer. Mappings can be reset on the *Field Mappings* page or on the *Mapping Approval* page.
- **Design Required** – The mapping has been reviewed by a Developer and rejected on the *Mapping Approval* page. The Mapper must update the mapping and submit it again.

- **Complete** – The mapping has been submitted when the Mapper has finished creating the mapping and clicks the Submit or Submit All icons on the *Field Mappings* page.

Rule Status values are:

- **Pending Review** – The default value indicates that a mapping for the rule:
    - Has not yet been submitted.
    - Has been submitted and is waiting for Developer review.
    - Has been reset by a Mapper or a Developer. Mappings can be reset on the *Automation SQL Field Mappings* page, the *Field Mappings* page, or the *Mapping Approval* page.
- **Revision Requested** – The mapping for this rule has been reviewed by a Developer and rejected on the *Mapping Approval* page. The Mapper must update the mapping and submit it again.
- **In Progress** – The mapping has been approved on the *Mapping Approval* page.
- **Complete** – The mapping development has been completed. A user clicked the Create and Complete icon on the Automation *SQL Field Mappings* page or the Create All Rules icon on the *Automation* page. A Developer clicked Complete on the *Mapping Approval* page.

Target Design

The Derived from Source field has been added to the *Target Fields* page. It allows the user to include or exclude a field from an insert rule when building the rule in SQL Automation.

Data Stewardship Platform (DSP™)

Collect

- In Collect, for a target source, the data store created in Data Services now has the target source name as part of the name when using an SAP Data Services using RFC package type (for example, <DS_SAP_SOURCE1_RFC>) to allow multiple sources to download to a single DS repository.

NOTE: Due to the changes in the naming of the Data Services objects (datastores, jobs and data flows) to improve the integration of the DSP™ and Data Services, the Collect Packages using Data Services as the package type (both RFC and standard) **must be rebuilt** from Collect in the DSP™ application.

- A validation message has been added in Collect on the *Tables* page for Data Services or Data Service using RFC package types to let the user know if a data services repository is not assigned on the *Target* page's vertical view.
- In Collect, the Data Services using RFC package type can only be used by a target source with a connection type of SAPAPPSERVER. The Manual Data Services package type is now available for Data Services connections.
- In Collect, on the *Tables* page's *Vertical* View Advanced Settings tab, a user can now edit the package name for a Manual Data Services package or accept the default name for the package.
- In Collect, when a table is added to a target source with SAPAPPSERVER as a source type, the package type now defaults to SAP Data Services using RFC regardless of the package type set in Common on the *Parameters – Collect* page > Package Info tab.

- A Do Not Delete check box has been added in Collect on the *Target Sources* page's *Vertical* View so that a user can choose whether or not data is automatically deleted from the target table when the target data is built and refreshed. This option has been added to support change data capture with Data Services.

Excel Integration

- A user can now update data in the DSP™ from an Excel spreadsheet created by the user (based on the current DSP™ page) or from a spreadsheet previously downloaded from the DSP™. Refer to "Import Data" in the online help for more information.
- The default values from the page are now applied for records inserted via Excel Integration. Refer to "Import Data" in the online help for more information.

Integrate

In Integrate, the Delay Between Records field has been added to the *Process* page's *Vertical* View. It allows the user to set the amount of time, in milliseconds, that passes after processing of one record is complete and processing of the next record can begin.

dspCompose™

- On the *Template (Role Excel Column Control)* page, the Include, Exclude, and Exclude If Null options have been moved to the toolbar to allow updates to multiple records.
- If columns have been previously imported and a new column is added to a template, when the columns are imported again, the new column is added but there are no updates to existing columns.
- On the *Template (Post Message Tables)* page, a user can identify the Integrate template ID specific to the post message tables if a dspCompose™ template is associated with a multi-template process in Integrate.

Resolved Issues

dspMigrate™

AutoGen

- An issue occurred after reports were created in Automation. If any values were changed on the *Target Lookup Table* page in Target Design and the reports were rebuilt, the lookup table changes weren't reflected in the reports. A target table join was not being updated. With the fix, the join is updated when reports are rebuilt, and changes to lookup tables display on reports.
- In Automation, the Include Action In Rule Name option was available in the *Parameters Automation* page. The underlying functions for this option had been removed previously. With the fix, the field is no longer on the page.
- In Data Services Automation, the data types FLOAT and BIGINT were causing validation errors. With the fix, the data types FLOAT and BIGINT are supported.
- In Data Services Automation, the Data Services rules in Transform were not properly identifying a field mapped to default to <blank> in Map. With the fix, fields mapped to default to <blank> in Map are correctly set to blank by the

Data Services rules in Transform. Refer to "Default" in the online help for more information about the Default action used in field mapping.

Map

- An issue occurred when generating a snapshot for Wave Gate metrics. If the snapshot contained a large number of records, the daily service page that calculates metrics failed. With the fix, the service page runs with no errors and the metrics are calculated.
- An error occurred when building reports with remediation that did not allow the reports to generate. The field length of the Specifications Section field on Transform's *Target Reports* page has been updated to unlimited, which corrected the issue. With the fix, remediation reports generate.

Target Design

An issue occurred that prevented a user from adding a source when the number of roles and role key values was in the thousands. After a user clicked Add, the processing icon displayed followed by a network connection error. With the fix, an Insert statement in a stored procedure was optimized and a user can add sources without receiving the error.

Transform

- Members of the ReportsOnly WebApp group in Transform could not access the *All Business Reports – All Wave/Process Areas* page. An update to the pages accessible to the WebApp group now allows members of that group to view the page.
- A procedure in Transform had a poorly formed concatenated IN clause which caused performance issues on the *Targets* and *Target Sources* pages. The procedure has been rewritten and views optimized to alleviate the performance issues.
- When a new report header/footer created in Console was chosen in Transform, the header/footer did not display on the report. With this fix, the new header/footer appears on the report.
- In Transform, an error occurred when a user entered a value in the Export Order By field on the *Target Exports* page's *Vertical* View. After processing the export, when a user clicked the View Export icon on the *Target Exports* page, an error displayed. With the fix, an invalid ORDER BY clause was removed from the query used to view the target export from DSP™. The ORDER BY clause is placed in the Assemble package. The records in the export file sort by the ORDER BY and the error no longer displays when the user clicks the View Export icon. Note that when viewing the export from DSP™, the sort occurs by the left most column.
- An error displayed if a user attempted to generate reports in Transform when the Report Generate Empty check box was disabled in Console on the Transform tab of the *Parameters* page. The Report Generate Empty setting determines whether Transform generates reports when there are no records on the report. With the fix, if the setting is disabled, only those reports that have records are generated from Transform.
- When registering a Target Remediation rule on the *Target Remediation* page, rules for all targets were available for selection in the Target Report Remediation Rule View list box. With the fix, only rules for the selected target display.
- Line feed characters from the field mapping fields in Map caused incorrect formatting in the Rulebook reports. With the fix, the line feed characters have been removed and reports are formatted correctly.

- If a target report had sampling configured, the sample report was not generated when the target was processed. With the fix, a report with sampling configured generates the sampling report when the target is processed.
- An error occurred when creating and executing a report that had an Order By clause. With the fix, reports can be created and executed in Transform with an Order By clause.
- An issue occurred when a business user was assigned to a report segment, but not to the full report. When the report was executed, the business user was removed from all of the report's segments, so could not access any report data. With the fix, the business user remains assigned to the report segment and unassigned to the full report. The user can view report data for assigned segments only.

Data Stewardship Platform (DSP™)

Collect

- Errors occurred during the Build Package process on AIX for DB2 ODBC. The ODBCDB2AIX connection type is available for Source Connection Types for the build/refresh process. With this fix, the Build Package process executes with no errors.
- In Collect, post action rules would fail because of missing brackets around columns names. With the fix, in Common, on the Collect configuration *Post Action Rule Table Column* page, when a column name is added the rule is created with the column name in brackets.

Integrate

An issue occurred when posting data using the post method BOAFileCreation. If the process post was based on a template view that contained thousands of records, the file creation process could take over an hour. The method for writing files using this post method has been updated. With the fix, these same files are created in under 10 minutes.

Online Help

- In online help, the *Target Fields* page field descriptions was updated with this note: "NOTE: If the field is Natural, the Verify Post Load check box is enabled by default when a user clicks the Activate icon on the Page toolbar."
- In online help, references to DTS packages were removed. Supported SQL versions have been updated to 2012 and 2014.

System Administration

- In System Administration, setting up a custom Security Role that only provides access to a single wave-process area and limited objects did not prevent assigned users from seeing additional process areas and objects. Security checks were added to the Wave: Process Areas and Process Area: Object to prevent users from seeing process areas and objects they were not assigned to.
- In System Administration, an error occurred when navigating to the *Security Definitions* page after a record was deleted from the *Security Definition Keys* page because the values for the key record were orphaned in the key value table. With the fix, the key definition and value records are deleted and the *Security Definitions* page loads correctly.
- In System Administration, the tasks were not visible on the *Failed Jobs* page's *Vertical* View for the General job type. The Tasks option was added to the *Failed Jobs* page's *Vertical* View. With this fix, the tasks are now visible.

- Failures occurred at a client's site for reports due to incorrect syntax in the code when object names contain spaces or special characters. With this fix, the reports are generated with no failures.
- Members of the Migration Developers group could not see the data source in Analyze after adding a data source in System Administration (on the *Data Sources* page). The DataSourceID was added to the Migration Developer Security Role which allows migration developers to see the data source when viewing the page.
- The email address for license requests has been updated to licenserequests@boaweb.com.
- When a validation failed for a soft required field, a warning message displayed. With the fix, validation failures for soft required fields return an error.
- When a validation for a soft required field was created, it was saved with a nonstandard name and description that made identifying the validation difficult. With the fix, the name follows this naming convention:
[TableName] + [ColumnName] + NN + "Val"
The description that displays for a validation failure is clear: the target field names are translated, and instructions to remediate the issue are included.
- When a validation for a list source was created, it was saved with a nonstandard name and description that made identifying the validation difficult. With the fix, the name follows this naming convention:
web[PageTableName]_[ColumnName]_NotInListVal
The description that displays for a validation failure is clear: the target field names are translated, and instructions to remediate the issue are included.
- When a validation failed for a list source, a warning message displayed. With the fix, validation failures for list sources return an error.

dspMonitor™

An error occurred when workflow emails were sent for reports. By default, dspMonitor™ does not send workflows to users if a report has zero records. If a report was generated that had zero records, but had previously generated with records, workflow emails were sent to users incorrectly. With the fix, workflows are not sent to users once the report has zero records.

Enhancement Requests from the User Base

dspMigrate™

- In Transform, the UI has been updated so that the *Target Source Rules* and the *Target Rules* page are consistent. The Source Rule field has been removed from the *Target Source Rules* page's *Horizontal* View and the Target Rule field has been removed from the *Target Rules* page's *Horizontal* View.
- In Transform, when registering a flat file export, the Assemble process is generated automatically and is defaulted to a tab delimited text file. The user has the option to specify alternate delimiters when registering a flat file export.
- In Transform, when adding a target export, if a Migration Developer selected a load type of LSMW, BDC views displayed as an option in the Target Export list box on the *Target Exports* page. BDC views should not be used with

exports of LSMW load type. A filter on the list box was updated, and BDC views no longer display in the list box when load type of LSMW is selected.

Data Stewardship Platform (DSP™)

- In online help, page navigation has been added to all field description topics.
- In online help, information has been included about how to Use Field Groups with Target Sources Other than the Default (*) Field Group.
- In online help, a note was added to clarify using the RuleXref and Xref actions: "When mapping fields on a multiple key lookup table, concatenate the fields with a ":" separator, for example, field1:field 2."
- In online help, the naming convention for packages (#Database#%#Source#%) has been added. Refer to "Create Packages" in the online help for more information.
- When in edit mode, if the user clicked an element on the page which resulted in a navigation, the record changes could have been lost. With the fix, the system displays a warning that the record changes can be lost and the user is required to confirm the action.
- In System Administration, added a parameter to adjust the number of days prior to expiration the license expiration warning message is displayed.

Last Updated on 7/22/2016