BackOffice Associates® Solutions

Release Notes

Version 6.6.1

Software Release Date: 09/29/17

Contents

Overview

BackOffice Associates® Solutions 6.6.1 contains the following updates.

- New Feature

- Enhancements

- Resolved Issues

- Enhancement Requests From Users

New Feature

IG Universal Connect

IG Universal Connect uses the DSP® combined with Dell Boomi, an Integration Platform as a Service (IPaaS) solution. Boomi's connectors allow the DSP® to extract and load data in systems that do not use a database connection, such as Workday, Salesforce or SAP SuccessFactors. The Boomi Process also has an associated atom, which is the execution environment. You can specify different atoms to execute for a given extract or load process (for example, Dev, QA and Prod).

In Boomi, a DSP® Implementer creates Processes using the IG Universal Connect Template, then registers the Processes in Common, Collect or Integrate.

In Collect, a Boomi Process can be registered as a Target Source allowing the Process to execute and pull data into Target tables. A new package type of IG Universal Connect has been added. Refer to "Extract Data using IG Universal Connect in Collect" in the online help for more information.

In Integrate, the new Template type of IG Universal Connect allows a user to create a Process Template that uses a Boomi Process to post data. Refer to "Post Data Using IG Universal Connect" in the online help for more information.

A WebApp developer can also register a Boomi Process to be executed from a custom page. Refer to "Execute a Boomi Process from a Custom Page" in the System Administration help for more information.

Access to IG Universal Connect is by subscription. Contact BOA Sales (sales@boaweb.com) for more information.

dspMonitor™

A Business Data Owner or Director of Data Governance can now view the *Monitor Dashboard* page to evaluate the quality of data and drill down into areas of data quality concern. The Monitor Dashboard is only available in beta and must be enabled to gain access. To enable the Monitor Dashboard go to the *Parameters* page, and then on the Metrics Parameters tab, click Enable DQS Dashboard (Beta). Once enabled, the dashboard is accessible from the DQS Dashboard (Beta) option in the Navigation pane. To provide feedback on this beta version of the Monitor Dashboard, contact support (http://support.boaweb.com) to enter a support ticket. Known issues with Monitor Dashboard beta are performance issues in large deployments and inaccurate report counts in summary row under certain situations.

Enhancements

dspMigrate™

Target Design

A warning message has been added when deactivating a key field in Target Design. The KEY FIELD check box must be unchecked before the field can be deactivated.

dspMonitor™

- dspMonitor™ now allows a Data Quality Steward to register a Collect target to a report repository. With this improvement, a Collect target provides access to the application, table, and column a report rule evaluates. This allows a Data Quality Steward to view data quality scores at the application, table and column levels. Refer to "Register Collect Targets to a Report Repository" and "View Your Applications" in the online help for more information.

- dspMonitor™ now allows a Data Quality Steward to set data quality scoring thresholds to determine what custom or sigma level threshold is considered Green, Yellow and Red. Refer to "Register Data Quality Score Thresholds" in the online help for more information.

- dspMonitor™ now allows a Data Quality Steward to configure custom data quality scoring thresholds or to use the sigma level delivered with the product to set thresholds. Refer to "Register Data Quality Score Thresholds" in the online help for more information.

- dspMonitor™ now allows a Data Quality Steward to register logic that determines the variables required to calculate a data quality score. The Data Quality Steward is able to register an Opportunity View that contains the full set of possible records that could potentially fail (an Opportunity Count) in its associated error report. Refer to "Register Report Repositories in dspMonitor™" and "Register Reports to a Report Repository" in the online help for more information.

- dspMonitor™ now automatically determines the Defects Per Million Opportunities (DPMO) of the Data Quality Scoring once the opportunity logic is configured for reports. Refer to "Register Report Repositories in dspMonitor™" and "Register Reports to a Report Repository" in the online help for more information.

- dspMonitor™ now supports summary notification workflows for items with data quality scores that are below the configured threshold. Notifications can be configured to be sent at a specific time interval (Daily, monthly, weekly... etc.). Refer to "Customize User Settings" in the online help for more information.

- The *Data Sources* page has been renamed to *Report Repositories* and the Data Source ID field has been renamed to Repository throughout the application and documentation.

- The *Quality Dimension* page is now accessible from dspMonitor > Administrative >Configuration > Quality Dimension.

- Quality dimension configuration has been enhanced. The user can now prioritize, activate and deactivate quality dimensions. In addition, when upgrading to 6.6.1, the quality dimensions Conformity and Integrity are changed to Consistency and Validity, respectively. Refer to "Register Quality Dimensions" in the online help for more information.

- A user can profile the target table using the profile functionality in Common. Refer to "Profile a Target Table in dspMonitor™" in the online help for more information.

Online Help

- A search filter has been added to restrict search results by component. Refer to "Online Help Search Tips" in the online help for more information.

- Added field description for Calendar ID to *User Management* page's *Vertical* View in Common.

- To improve clarity, a note instructing users on how to allow business users to see the results of the Duplicate Detection process was added to the topics "Find Duplicates Overview" and "View Results" in Common.

- The "Add a System Type Model" topic has been updated for clarity.

- The following pages are no longer accessible in dspMonitor™, so they have been removed from the help:
    - *Material Types*
    - *Customer Account Groups*
    - *Vendor Account Groups*
    - *Informal Words*
    - *Unit of Measure*
    - *Special Characters*
    - *Postal Code Formats*
    - *Inspection Types*

- Additionally, the follow topics related to those pages have been removed from the help:
    - Add Material Types
    - Create Customer Account Groups
    - Create Vendor Account Groups
    - Register Informal Words
    - Register Units of Measure
    - Register Special Characters
    - Register Postal Code Formats
    - Register Inspection Types

- The section Manage Duplicate Detection has been added to the online help to describe this feature (which is not new for 6.6.1). Duplicate Detection is a validation rule included with the DSP® that uses search engine indexes to find possible duplicate records.

- The *Pages* page in online help has been updated to include field descriptions for each page type. Sections describing page design have been updated and the following topics have been added:
    - Page Design Overview
    - Create a Static Page
    - Layout Frames
    - Page (Chart Properties)
    - Create a Service Page
    - Copy Page
    - Page Types
- The following topics were added about binding criteria:
    - Page Column Links
    - Add Binding Criteria when Linking to a Page

dspConduct™

The Configuration and Security menus have been updated.

The *Category Objects* page has been removed from the Configuration menu and is accessible via:

1. Select **dspConduct > Design** in the *Navigation* pane.
2. Click **Vertical View** for a category.
3. Click the **Org Unit Types** icon.
4. Click **Add**.
5. Click **Click to add a new item** in the **OBJECT NAME** list box.

The Configuration menu structure is:

- Configuration (Clicking this item no longer opens a page. It used to open the *Category Objects* page.)
- Org Units (Opens *Org Units* page)
    - Org Units Groups (Opens *Org Units Groups* page)
- Configuration Import (Opens *Category Import View Configuration* page)
- Messaging (Opens *Workflow Message Defaults* page)
- Setup (Does not open a page)
    - dspConduct Tasks (Opens *dspConduct Tasks* page)
    - Request Status (Opens *Request Status* page)
    - Scenario Type (Opens *Scenario Type* page)

     o   Parameters (Opens *Parameters* page)

The Security menu structure is:

- Security (Opens *User Settings* page. In previous versions, opened the *Position* page.)

  - User Settings (Opens *User Settings* page)

  - Positions (Opens *Position* page)

  - Common: User Management (Opens *User Management* page in Common)

dspCompose™

A Template Administrator can now set the target system connection for each process template in a request or external request scenario by clicking the Connections Icon on the following pages:

- *Template (External Request Scenario)*

- *Request*

The connections set for process templates associated with a request can also be viewed by clicking the Connections icon on the *Request (Post)* page.

The following pages have been added for use with this setting:

- *Template (External Request Scenarios Connections*

- *Request Post Connections*

- *Request Connections*

Data Stewardship Platform (DSP)®

Common

Excel Integration has been enhanced on the *User Management* page to allow an Administrator to add and manage user accounts. Fields required for account maintenance were added to the Excel spreadsheet downloaded from the *User Management* page. Refer to Create and Manage User Accounts in Common in the online help for more information.

Online Help

- Added field description for Calendar ID to *User Management* page's *Vertical* View in Common.

- To improve clarity, a note instructing users on how to allow business users to see the results of the Duplicate Detection process was added to the topics "Find Duplicates Overview" and "View Results in Common."

- The "Add a System Type Model" topic has been updated for clarity.

- A search filter has been added to restrict search results by component. Refer to "Online Help Search Tips" in the online help for more information.

Resolved Issues

dspMigrate™

Console

An issue occurred when selecting the Report Column Qualifier setting while configuring Transform parameters in Console. The qualifier is used to delineate column data containing spaces or special characters. When the user selected a pipe (|) for the qualifier, the downloaded report data used a comma as a delimiter instead of a pipe. With the fix, the pipe character is used correctly as a delimiter in the downloaded .txt file. [DSP-7531]

SQL AutoGen

An error that prevented a user from rebuilding a Full Construction source table and page has been corrected. [DSP-9183]

Transform

- An issue occurred in the Rule Book report where the Instruction column was not formatted correctly. With this fix, the Rule Book report has been improved by removing the improperly formatted Instruction column and adding the Rule SQL and Rule Where Clause columns. In addition, the Rule Book report on the *Target Source Rule Book* page in Map has been improved by adding the Rule SQL and Rule Where Clause columns. [DSP-7362]

- An issue occurred with cached reports that used the Report Order By setting. The reports were not sorted correctly. With the fix, reports sort as configured in the Report Order By field. [DSP-6498]

dspConduct™

- An issue caused users with expired logins to the DSP® to continue to receive workflow emails. With this fix, users with expired logins no longer receive workflow emails. [DSP-9027]

- An issue occurred when CTS'ing dspConduct™ Positions that had users assigned to them. Users were included in the CTS Archive. Users are not moved with the CTS process, as user IDs in a Source instance may not exist in a Target instance, and security settings in a Source instance may not be properly applied in a Target instance. With the fix, a Position's users are not included in the CTS Archive, and must be manually added to Positions in the Target instance. [DSP-7587]

dspMonitor™

A typo in the description for the dspMonitor Service page *Send Notifications WorkFlow* has been corrected. [DSP-9156]

Data Stewardship Platform (DSP)®

- An issue occurred with the location of the Admin item in the *Navigation* pane. It displayed incorrectly below Reports. With the fix, the Admin item displays below the System item. [DSP-9174]

- When the user clicked the help icon in DSP Add Ons, the product help opened, which did not contain help for DSP Add Ons. With the fix, the DSP Add Ons help displays correctly when the user clicks the help icon on any DSP Add Ons page. [DSP-9055]

- An issue occurred in the DSP Platform where custom authentication would fail with passwords that contained uppercase letters. With this fix, custom authentication allows passwords with uppercase letters. Refer to the BOA

Solutions Configuration Authentication Manual for Windows Server 2008 and 2012 for more information about authentication methods.[DSP-8166]

- An issue occurred in System Administration when installing 6.6 where the Audit Table Exists service page failed because of invalid records in a table. With this fix for 6.6.1, the invalid records have been removed and the service page runs as expected. [DSP-9402]

Collect

- An issue occurred in Collect with table refresh when the Recycle Job Max parameter was set to 0 on the *Parameters – Collect* page in Common. The Recycle Job Max parameter controls the number of times the download process is recycled. If the job fails, the table is recycled into the job queue at the end of the current cycle. With this fix, any working table registrations are refreshed as expected. And if Recycle Job Max is set to 0, the job isn't recycled, as expected. [DSP-9170]

- On the *Parameters - Collect* page, DBMoto Settings tab, the field name Server Address has been updated to Server Name for clarity. [DSP-9217]

- An issue occurred where the default column delimiters for ODBCSYBASE connection types were not automatically configured in the Left Column Delimiter and Right Column Delimiter values on the *Source Connection Types* page's *Vertical* View. With this fix, the correct values are defaulted on the *Vertical* View. [DSP-9154]

- An issue occurred on the *Tables* page where an error would display when a user accessed the page's *Vertical* View if many (in excess of 300) sources were registered. The issue was caused by the views used to calculate the Record Count for the table. The following updates have been made to correct the issue:

    o Inactive sources are no longer counted.

    o The Max Record Sources For Union View parameter has been added in Common to the *Parameters – Collect* page, General Settings Tab. If the number of sources registered exceeds the threshold set by this parameter, no Record Count is calculated and the Record Count field on the *Tables* page's *Vertical* View is 0. [DSP-9085]

Common

- An issue caused an error on the *User Management* page's *Vertical* View when updates were saved. The calendar ID parameter was not being supplied. With this fix, the calendar ID parameter is supplied and user information can be saved. [DSP-9176]

- An issue occurred on the *System Types Model Group Tables* page that allowed duplicate tables to be assigned to a Model Group. This caused the System Type Model Group import to fail. With this fix, duplicate tables have been removed from the delivered System Type Models and a validation prevents users from adding the same table to a group multiple times. [DSP-9094]

- An issue occurred in Common when importing a System Type from a System Type Model Group. Lookup and description tables associated with the tables in the Model Group were not imported. With this fix, when

importing a table from a model group, all tables along with their associated descriptions and lookup tables are imported. [DSP-7519]

- An issue occurred on the *System Type Models* page where the Value field in the MODEL VIEW: TABLE FIELD STATIC VALUE LIST was limited to NVARCHAR(10). With this fix, the Value field is now set to NVARCHAR(128). Refer to "View Fields Required for System Type Tables" in the online help for more information. [DSP-9219]

- An issue occurred where a GUID was displayed in place of the table names on the *System Types Groups* page. With this fix, the *System Types Groups* page is not populated by the import process until the System Type Tables have been populated and a System Type Table ID exists. [DSP-9231]

- An issue occurred in Common when importing a System Type model with a NULL language field in the description table. The description table fields were not imported. With this fix, the description table and field with a NULL value for the language column is imported. Refer to "Import a Model" in the online help for more information. [DSP-9257]

- An issue occurred on the *System Type Models* page where validations were failing for fields in views when the fields were correct. With this fix the correct view is validated and only fields that are missing or incorrect are marked as invalid. [DSP-9232]

- An issue occurred when adding a record on the *System Types Tables* page in Common when a user accessed the page from the *Horizontal* View of the *System Types* page. The user could enter data and attempt to save, but the record was not added to the database. With this fix, records added on the *System Types Tables* page are now saved to the database as expected. [DSP-9220]

- An issue occurred when importing a System Type from a System Type Model in Common. If the data source for the System Type Model was not DSPCommon, the import failed. With the fix, a System Type imports successfully, using the data source from the System Type Model, whether it is DSPCommon or not. [DSP-9258]

- An issue occurred when importing a non-SAP System Type Model into a System Type. SAP was hard coded as the source connection type, preventing field data types from importing properly. A field has been added to the *System Types Models* page to allow the user to select a source connection type for the System Type Model. The available source connection types are configured in Collect and provide a mapping from the data type supplied in the Table Field Model View to a valid SQL Server data type. If a mapping does not exist in the connection type, the DSP® will directly pass the data type from the Table Field Model View into the System Type on import. [DSP-9230]

Integrate

In Integrate, an issue that caused slow performance while loading data with large record sets has been corrected with the addition of SQL indexes. [DSP-7532]

Online Help

- In the topic "Keyboard Shortcuts," the Date Time picker shortcuts have been updated because they were incorrect. [DSP-8984]

![BackOffice Associates logo]

- In the topic "View the Construction Page in Construct," the typo "Contract" was corrected to "Construct." [DSP-9186]

- When the user clicked the help icon in DSP Add Ons, the product help opened, which did not contain help for DSP Add Ons. With the fix, the DSP Add Ons help displays correctly when the user clicks the help icon on any DSP Add Ons page. [DSP-9055]

- The topic "Synchronize a Template Role's Excel Column Control Settings with the Template Role's Assigned Platform Page" has been replaced with "Import a Column Added to the Template Role's Assigned Platform Page" to reflect current functionality. The description of the Import Columns button on the *Template (Role Excel Column Control)* page has also been updated. [DSP-9290]

- The steps in the "All Objects" topic have been updated to reflect the correct navigation.

- In the topic "Append Columns to all Target or Source Tables in Target Design", "or edited" was removed from the note below as there is no Edit button on the page.
  NOTE: The zSource column is installed with the platform and cannot be deleted. [DSP-9329]

dspCompose™

- Any dspCompose™ Archive Compare tables - rtxxxCompare - that were created prior to 6.6 have ArchiveID defined as an Identity field. In 6.6, the Compare tables do not have the ArchiveID as an Identity field. During the upgrade, these Compare tables should be modified to drop the Identity field for the existing Compare tables.
  Templates in 6.6 and later will create rtxxxCompare tables with a foreign key from ArchiveID to rt table ArchiveID. [DSP-9331]

- An Internal Error occurred when a posting failed for a dspCompose™ request under certain conditions. During the posting process, if no record was written into the rt table, the process still attempted to insert a record into the rt Compare table, causing the error. With the fix, the process does not attempt to insert a record into the rt Compare table, and the Internal Error no longer occurs. [DSP-9337]

Enhancement Requests From Users

Fields have been added to dspCompose™ and Integrate pages to provide users with more details about when scheduled posts will run.
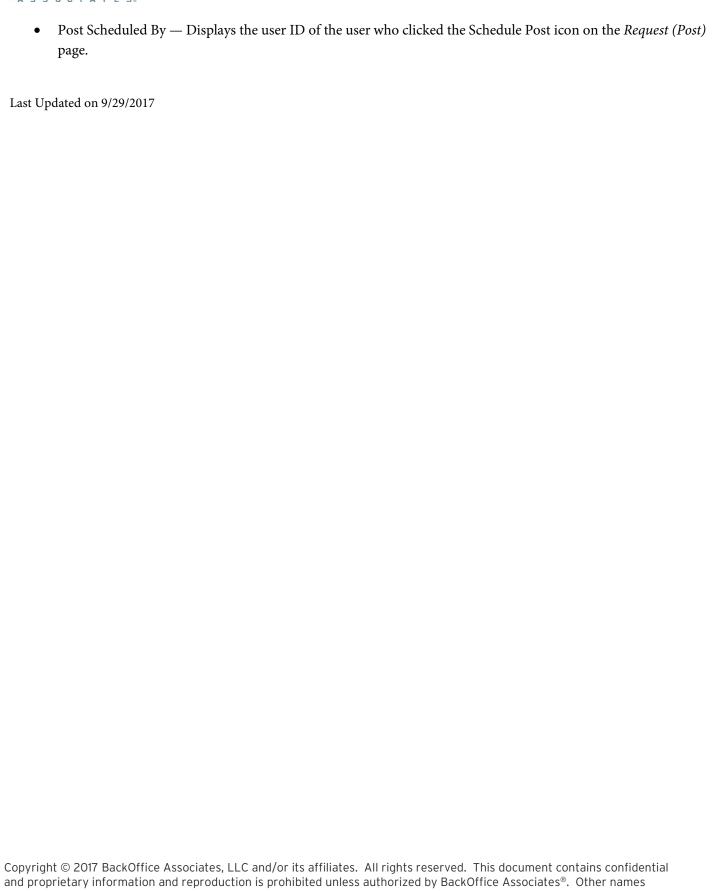
On the dspCompose™ *Request (Roles)* page, these fields have been added to the *Vertical* View:

- Scheduled Post Start Time — Displays the time the schedule background post runs.

- Integrate Posting ID — Click the link to open the *Post Monitor* page in Integrate for details about this posting.

On Integrate's *Post Monitor* page, these fields have been added to the *Vertical* View:

- Posting Placed In Queue — Displays the time when a user clicked the Schedule Post icon on the *Request (Post)* page

- Post Scheduled To Start — Displays the post start time as set on the *Request (Post)* page's *Vertical* View.

- Post Scheduled By — Displays the user ID of the user who clicked the Schedule Post icon on the *Request (Post)* page.

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