BackOffice Associates® Solutions

Release Notes

Version 6.6.2

Software Release Date: 12/15/17

Contents

Overview

BackOffice Associates® Solutions 6.6.2 contains the following updates.

- New Features

- Enhancements

- Resolved Issues

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New Features

Regulatory Compliance

The DSP assists clients with regulatory or corporate compliance by:

- Restricting access to personal data (any data that can be used to identify a person), handled through DSP security and through purging data after a retention date has passed. Purging data is configured in Common and Collect.

- Tracking and logging user access to this data throughout the product, which is configured in System Administration.

Settings must be configured before compliance can begin.

- An Administrator must enable the logging feature in System Administration. By default, the DSP tracks access to all pages; however, an Administrator can control which pages are tracked. Refer to Log Access to Personal Data in System Administration help for more information.

- At the client site, an Administrator must also set up auditing for these specific tables in the DataSource named "DataGarage".

    - dgTarget

    - dgTargetSource

    - dgTargetSourceTable
      When a Data Controller updates any retention expiration date, an e-signature is required and captured in the audit records.

- At the client site, an Administrator should also set up auditing for any tables that contain regulated data. Refer to Enable Auditing for Tables with Personal Information in System Administration help for more information.

- A Collect Administrator must configure data protection for the Target, Target Source and Table on the new Data Protection tab in Collect. The following settings can be configured:

    - **Data Controller** — The user responsible for the processing of personal data in the target. Any user or group who is assigned the Data Controller role must have a user account in the DSP. Data Controller must have access to the target based on their assigned security role and security key.

- o **D**ata Classification — The nature of the data in the target, identifying whether a target contains personal data and so must be purged.
- o **Retention Expiration Date** — The date when the data in the target, target sources, and tables will be automatically purged when a Service page runs.

Refer to Regulatory Compliance in the online help for more information.

dspConduct™

- A Director of Data Governance can now view the new Business Value Dashboard charts to evaluate the cost and time saving associated with automating business processes with dspConduct™. Refer to View Business Value Dashboard in the online help for more information.

- dspConduct™ now allows an Administrator to set the currency label on the *Parameters* page that is displayed for the Average Cost Per Hour field on the *Business Process* page's *Vertical* View. An Administrator may also set the default calendar used for working hours calculations on the new Business Value Dashboard. Refer to Set Currency Display Label and Set Calendar Used For Business Value Calculations in the online help for more information.

- dspConduct™ now allows a Process Designer to configure business value parameters on the Business Process page's Vertical View. A Designer can set the Baseline Hours and Average Cost Per Hour values that are used to calculate the information displayed on the new Business Value Dashboard. Refer to Configure Business Value Parameters for more information.

- A Process Designer can now access the Business Value Dashboard from the Business Process page's Vertical View for the specific Business Process. Refer to View Business Value Dashboard for more information.

dspMonitor™

The Monitor Dashboard released as beta in 6.6.1 is now live. Once dspMonitor™ is configured and reports are processed, the dashboard is displayed automatically when dspMonitor™ is accessed. You can also access the Monitor dashboard by selecting DQS Dashboard in the Navigation pane. Users will not see any data in their dashboard after initial upgrade. The update introduces a layer of tables that will only be populated on new execution of reports. Most of these are scheduled to run daily, so you will begin to see updates either the next day, or you can manually process some reports, and groups and data will come in as they complete their execution.

Enhancements

Data Stewardship Platform (DSP) ®

Common

Client fields can now be excluded when importing a System Types Model by checking the Exclude Client Fields checkboxes on the System Types Import page. Refer to Import a Model for more information.

Automate

Previously, the Comment, Message Success and Message Failure fields in the Contact Info Tab for Message Success and Message Failure on the Vertical View of the Interfaces page displayed as text boxes. With this release, the text boxes are now larger text areas that can display the 2000 characters that the fields can contain.

Resolved Issues

dspMigrate™

In previous versions, users with specific security definitions may have had access to pages not included in their security definitions when navigating to the Context Select pages in Target Design, Map, Construct, and Transform. Now, the Context Select pages in Target Design, Map, Construct, and Transform have the correct Security Definitions configured. [DSP-9342]

Console

- An issue occurred where if a user was deleted while using a specific Wave and Process Area, that Wave and Process Area could not be deleted. With this fix, even if a user is deleted while using a specific Wave and Process Area, that Wave and Process Area can be deleted. [DSP-1866]

- In previous versions, when adding the Target System to a Wave in Console, users were given the option to Click to add a new item and also the option to Use this value when typing a value in the text box. It was possible that users would use the Use this value method, causing an error if the Target System name was not properly formatted. Now, users only have the option to add a new item by clicking the link. [DSP-5155]

Map

An issue occurred where the External Source ID field on the Vertical View of the Field Mappings page was hidden. With this fix, the External Source ID field is visible again. [DSP-9395]

Target Design

An issue occurred where the Import Fields process returned two rows displaying the same Target table for Targets added with an incorrect Target name. With this fix, the Import Fields process only returns one row for the added Targets. [DSP-6471]

dspConduct™

- An issue that caused expired users to display on the dspConduct Position User page and User Settings page has been corrected. [DSP-9464]

- When Reviewers reset their Roles, the Roles dependent upon the Reviewers would get emails as if the Reviewers had finished their tasks. Now the Reviewers must complete their tasks before emails are sent. [DSP-9159]

- An issue occurred in dspConduct when a user added a Role to a Scenario. The newly created Role would not appear on the *Business Processes (Scenario Roles)* page. Now, when a user creates a Role on the *Scenario (Roles)* page, it displays when the user clicks the Roles SLA icon for a Business Process Scenario. [DSP-9212]

- An issue occurred in dspConduct when a user deleted a Role from a Scenario. The deleted Role would still appear on the *Business Processes (Scenario Roles)* page. Now, when a user deletes a Role on the *Scenario (Roles)* page, it does not display when the user clicks the Roles SLA icon for a Business Process Scenario. [DSP-9213]

- In previous versions of dspConduct where a linear role flow was created, users could reject roles even when the role dependency was not complete. Now, users are not able to reject these roles. They do not display on the *Request Review Task* and *Request Review Task Roles* pages until the role dependencies have been completed. [DSP-9223]

- An issue occurred where the Scenario Role Task Level for Review and Post Roles contained application tasks that were not relevant for the Scenario but were relevant for other Scenarios, such as application tasks for the reused Post and Review Role from another Scenario. With this fix, only the relevant application tasks are included at the Scenario Role Tasks level for the Review and Post roles. [DSP-9295]

- An issue occurred when using the CTS process to move a dspConduct role, scenario, or business process under certain conditions. If multiple roles contained the same task, and each of these role task combinations had multiple variants, the CTS process failed. The process attempted to move variants from role-task combinations unrelated to the current role task. The default configuration for dspConduct CTS has been updated and the CTS process now moves roles to the Target as expected. [DSP-9106]

- An issue occurred where the Scenario Role Task Level for Review and Post Roles contained application tasks that were not relevant for the Scenario but were relevant for other Scenarios, such as application tasks for the reused Post and Review Role from another Scenario. With this fix, only the relevant application tasks are included at the Scenario Role Tasks level for the Review and Post roles. [DSP-9295]

- An issue occurred where the Scenario Role Task level did not produce a record of the Post task; therefore, it did not display on the *Request Role Task* page, and the Post event could not be initiated. With this fix, the Post Role at the Scenario Role Task level produces records for the Post task and the Post event initiates. [DSP-9294]

- An issue occurred where the Scenario Role Task level did not produce a record of the Role task. With this fix, the Role at the Scenario Role Task level produces a record for the Role task. [DSP-9189]

- An issue occurred where all the tasks in the Review and Post Roles appear at the Scenario Role Task level. With this fix, the Review and Post Roles only show Application Tasks that are in the application Roles on which those Review and Post roles are directly dependent. [DSP-9215]

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Collect

An issue occurred where removing users' Collect Target access from the User Specific Security Definitions in System Administration did not remove all references to those users' access to the Target. With this fix, removing users from a Collect Target fully removes their access to that Target. [DSP-9376]

Common

In version 6.6.1, when users clicked the Create Source Table icon on the *Automation SQL Target Source* page, the view was not being created, failing with an invalid column name '#AutoDropReport#'. Now when users click the Create Source Table icon, the view is created without error. [DSP-9512]

Online Help

- Previously, the Sync Data Sources in Common and System Administration topic described the Out of Sync icon in the OUT OF SYNC column on the Data Source Registry page as being a clickable icon that syncs the changes made in Common to System Administration. With this fix, the documentation has been updated to reflect that the Out of Sync icon displays to indicate that changes have been made to a data source that must be updated by validating or saving the record in Common. [DSP-9529]

- The title of the Collect Target Monthly Summary Chart page has been updated from "Monthly" to "Target Monthly Summary," to be consistent with the title conventions of the Weekly and Daily summary chart pages. [DSP-7270]

Enhancement Request From Users

Online Help

A note was added to the Excel Integration Import Data topic clarifying when duplicate primary key errors occur. [DSP-9555}

Last Updated on 12/18/2017