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# LeasePak 6.3a Release Notes

Includes release information through build 6.30.3055

## Release Bulletin

The updated list of LeasePak 6.3a enhancements is now part of the [Release Bulletin](#). You can also find a copy of the Release Bulletin (63a\_mr1\_release\_bulletin.pdf) in the ReadMe folder.

## Fixed Discrepancies Listing

The [Fixed Discrepancies Listing](#) contains an archive listing of discrepancies fixed in LeasePak versions prior to 6.3a. For discrepancies fixed in LeasePak 6.3a, refer to the [Release Bulletin](#).

## Fixed ADOCs Listing

The [Fixed ADOCs Listing](#) contains listing of documentation errors (ADOCs) fixed in LeasePak version 6.3a GA.

## Important Notices



### New Requirements and Setup for DocSuite

You must set DocSuite up on a web server in order to access its content. There are several options for meeting this requirement:

#### **docsuite.netsoltech.com**

If you access DocSuite using NetSol's server at [docsuite.netsoltech.com](http://docsuite.netsoltech.com), you do not need to do anything. NetSol provides all server requirements for the documentation. If you are not already using [docsuite.netsoltech.com](http://docsuite.netsoltech.com) but wish to start, contact [LeasePak Help Desk](#) for a username and password.

#### **On-Site Web Server**

If you wish to host DocSuite on your own web server, you will need a server that includes PHP 5.x. Your web server/PHP combination must resolve PHP \$\_SERVER variables, specifically \$\_SERVER['DOCUMENT\_ROOT'], \$\_SERVER['QUERY\_STRING'], and \$\_SERVER['SCRIPT\_NAME'].

NetSol has set up and successfully run DocSuite on the following OS/server/PHP combinations:

- Linux/Apache 2.x/PHP 5.x
- Windows/Apache 2.x/PHP 5.x
- Windows/IIS 7/PHP 5.x

Earlier versions of IIS may not resolve PHP \$\_SERVER variables and will therefore not work for DocSuite. You can run `phpinfo.php` on your server setup to check for this.

## Search Function

By default, DocSuite Search links take users to the search engine installed on [docsuite.netsoltech.com](http://docsuite.netsoltech.com). If you wish to keep users on your internal server from linking to [docsuite.netsoltech.com](http://docsuite.netsoltech.com), you must either disable this link or change it to point to a search engine installed on your site.

## Portable Web Server

NetSol can provide a copy of DocSuite on the portable web server Server2Go, which you can use from a CD, flash drive, or directory on any PC.

## Search Function

DocSuite on Server2Go currently uses the search engine installed on [docsuite.netsoltech.com](http://docsuite.netsoltech.com). In the future NetSol will offer a Server2Go solution that includes a self-contained search engine.

## Setup

These instructions only apply if you are installing DocSuite on your own web server. If you access DocSuite using NetSol's server at [docsuite.netsoltech.com](http://docsuite.netsoltech.com), you do not need to perform any setup.

### */pdsconf* Folder

The `docsuite` folder contents include a folder called `/pdsconf`. You must place a copy of this folder and its contents in your web server's root directory. For IIS, this is usually the `wwwroot` directory. For Apache, this is usually the `html` or `htdocs` directory. Place `/pdsconf` in the root directory so that the following root-relative URLs resolve correctly:

```
/pdsconf/pds_top.php  
/pdsconf/pdsconf.php
```

### *docsuite* Folder Contents

You must keep the contents of the `docsuite` folder together in the same directory. You can place these contents under your web server's root directory or you can place them in any directory below the root, as long as a copy of `/pdsconf` is in the root directory. The directory you choose for the `docsuite` contents does not need to be named `docsuite`; however, .

## Default DBMS Platform

If you wish to avoid having to set your DBMS platform each time you access the Database Reference, you can set a default DBMS in the `/l pdsconf/l pdsconf. php` file. To configure, edit `/l pdsconf/l pdsconf. php` and modify the following line:

```
$l pdsconf[' dbms' ]="" ;
```

For Oracle, change this to:

```
$l pdsconf[' dbms' ]="ora" ;
```

For Sybase, change this to:

```
$l pdsconf[' dbms' ]="syb" ;
```

Be sure to modify the `/l pdsconf/l pdsconf. php` under your web server's root directory. You will need to perform this configuration each time you install a version or revision of the DocSuite contents.

## Search Function

If you wish to keep users on your internal server from linking to [docsuite.netsoltech.com](http://docsuite.netsoltech.com) when they click **Search**, you must either disable this link or change it to point to a search engine installed on your site. NetSol provides a single point for this configuration in the `/system/search/index. php` file. To configure, edit `/system/search/index. php` and modify the following JavaScript line:

```
<scri pt type="text/j avascr i pt">l ocati on. repl ace(' http: //docsui te. netsol tech. com/s
```

Either change the argument for `l ocati on. repl ace` to point to the location of your search engine, or replace the line with HTML text to let the user know the function is disabled.



## System Administration Guide Rewritten:

In v62a and v63a, several central chapters of the System Administration Guide have been substantially rewritten.

The installation chapter **LeasePak Server > Preparation and Installation** has been completely rewritten and now corresponds very closely to the software. It is strongly recommended that the Administrator and the Operator in charge of installing LeasePak Version 6.3a read this chapter thoroughly and in particular the section concerning the Setup Interview and prepare their answers before running **SETUP**.

The configuration chapter **LeasePak Server > Configuration and Maintenance** has been substantially rewritten. In particular, the purposes and roles of the entire constellation of LeasePak users has been rewritten. Cross references to Preparation and Installation are now active, and the most common database maintenance scripts are documented.

For v63a, the chapters on Oracle and Sybase installation have been expanded and cover current version (Oracle 11g and Sybase 15) installation and setup.

## Enhancement Summaries (MR1)

### **529403 File Attachment URL**

Enhances the File Attachment module and allow updates through a web service. Users can attach any hyperlink and a document to hyperlink. The browse button functionality will only accept the internal document links. For http:// and ftp:// links users are required to type in the address of the external links to the document links and documents. Adds two new radio buttons "File and Path" and "URL (web address)" for internal and external document links and hyperlinks to external documents.

[LeasePak Modules: File Attachment](#)

[Collection Tracking : Lease Summary](#)

[Collection Tracking: Alternate Lease Summary](#)

[Customer Service: Lease Summary](#)

[Web Service LPApplication](#)

[Web Service LPBooklease](#)

### **529371 Credit Bureau Reporting - High Credit Limit**

Enhances LeasePak functionality of Metro2 Credit Bureau extract and allow the user to report the High Credit Limit as the amount financed for interest bearing loans (IBLs). The amount financed used for the High Credit Limit will be used from from the first asset of each loan that is to be reported. The Charge-Off Amount field of the Metro2 base record will remain unchanged and unaffected.

[U0462 – Credit Bureau Extract Metro 2 Format](#)

### **528594 SRR1 for 527316 Add new fields to UCC Extract**

This enhancement allows the user to create a new version of the customizable stored procedure and XSL template used by the UCC extract utility in LeasePak which extracts information about all new bookings for a given date range for the purpose of UCC filings.

[241 UCC Filling Extract](#)

## Enhancement Summaries (GA)

### **526759 Security Role**

Provides a new module named "Security Role". LeasePak allow the user to create and maintain a role. This enhancement divides the U0706 functionality into following two parts:

- [U0706A Individual.](#)
- [U0706B Role.](#)

The existing U0706 individual user set to the U0706A. Users must own [Security Role](#) module to access Security – Role [U0706B] functionality. U0706B allow the user to Add, change and delete a role. A number of individual user(s) are allowed to associate with a single role.

[LeasePak Modules: Security Role](#)

[R0924 Security Access Report.](#)

[R0930 Security Access - Roel Report.](#)

[Utility 108 Add User Security Record.](#)

[LeasePak Login.](#)

[Change Password.](#)

[U0706A Individual.](#)

[U0706B Role.](#)

## Enhancement Summaries (Beta 1)

### 524159 Separate Enhanced IDC/IDR from Vehicle Module

This enhancement separates the functionality of Enhanced IDC/IDR from the LeasePak functionality of current Vehicle Finance Module. LeasePak ensures a new separate module named Enhanced/IDR. This module separates the enhanced IDC/IDR fields from Vehicle Finance module.

[U0101 Book Lease: Enhanced IDC/IDR](#)

[Payoff \[U0103\]: Payoff, Payoff Reversal](#)

[U0108 Lease Extension](#)

[U01112 Split/Merge Qty Asset : Transfer of New Asset](#)

[U0115 Suspended Earnings](#)

[U0116 Rebook: Enhances IDC/IDR](#)

[U0201 Vendor : Vendor Miscellaneous Tab](#)

[U0212 Portfolio: Assessment Customization](#)

[End of Period: Monthly Updates -> Dealer statement U0426](#)

[U0213 Payoff Quote](#)

[U0225 IDC/IDR Adjustment](#)

[U0301 Cycle Accruals](#)

[U0440 Automatic Charge Off](#)

[U0721 Lease Form](#)

[U08 Application](#)

[Application User Profile](#)

[R0109 Model Amortization](#)

[R0112 Forecasting](#)

[R0502 Application Inquiry: Terms of Application](#)

[R0609 Suspended Earnings](#)

[R0901 Trial Balance](#)

### **525358 Remarketing - Batch Asset Sales**

Provide two new modules named:

- **Batch Sale of Asset**
- **Batch General Ledger Adjustment.**

Batch Sale of Asset includes utility **114 Batch Sale of Asset & 115 Batch Sale of Asset Reversal.**

These utilities allow the user to process U0103 sale of asset in inventory and sale of asset in inventory reversal transactions. Batch General Ledger Adjustments module includes utility 113 Batch General Ledger Adjustment and allows the use to process U0121 general ledger adjustment transactions.

[Utility 113 Batch General Ledger Adjustment](#)

[Utility 114 Batch Sale of Asset](#)

[Utility 115 Batch Sale of Asset Reversal](#)

### **528079 Credit Bureau (527284)**

This enhancement will enhance the LeasePak functionality of current credit bureau reporting that is generated by running the LeasePak utility 223 Metro2 Extract. The credit bureau reporting will now create multiple J2 records when multiple co-lessees exist on a single given lease. LeasePak will also keep track of any changes when lessee or co-lessees are added or removed from the lease so that the credit bureau reporting can properly report transfer of equity.

Metro2 extract utility will report the following:

- Termination when lessee is removed from the lease.

- New lessee in the month after the termination of the lessee is reported
- Current lessee's payment history.
- Multiple J2 records when more than one co-lessee exists on the lease.
- Addition and deletion of co-lessees.

Relevant doc's are:

[Metro2 Setup \[U0733\]](#)

[Credit Bureau Export \(Metro2\)](#)

[223 Metro2 Extract](#)

### **528290 Web Service for Check Disbursal (527313)**

Provides LeasePak a new API Web Service method, which automates the process of disbursing checks for the newly booked leases. This new web service allows the user to:

1. Indicate that how much to disburse a check
2. For how much to use the NEWD type.

[Document-Literal Web Services - LPBookLease](#)

### **528291 VIN Validation**

This enhancement enhances the LeasePak Vehicle Finance module functionality to validate the VIN number entered by the user. Users are required to turn on an option to validate the VIN number once entered in Identification field of an asset with class V of vehicle. Users can turn on/off the functionality at the Custom General level. It only applies to assets with a class that begins with 'V' for vehicle.

[U0101 Add Asset: General, Title Fillings](#)

[U0712 Custom General: Miscellaneous Customization](#)

### **528305 Prorate Income \*PX5, \*VL6, \*VLE, \*VV6, and \*IF6**

Provides support to the Prorate Income module for the following accrual methods:

- \*PX5
- \*VL6
- \*VLE
- \*VV6

- \*IF6

### [Prorate Income](#)

#### **528757 SRR2 for 526640 New Trans Codes for Neg Principal Pmt (528561)**

Allow the user to calculate the total amount for R0909. It also updates the transaction payment codes for general ledger.

#### **528758 Vertex L Series Pre-Processor (528684)**

Provides the user to identify and use a file from Vertex called STAXMAST with 800 bytes per line instead of the current file SEQEXP with 200 bytes per line. For prior versions of LeasePak, it will create a preprocessor script that will convert the STAXMAST file to SEQEXP file format by truncating the extra 600 bytes from each record.

### [Vertex Interface \(L Series\) \[U0437\]](#)

## LeasePak Database Changes

### **rac Preauthorized Payments Control**

#### **Column Add**

Column Name	Description	Oracle Datatype	Oracle Allow Null	Sybase Datatype	Sybase Allow Null	Initial Value
pap_to_lse_c	Copy PAP (Preauthorized payment) information to lease when booking (Y/N)	CHAR(1)	yes	char(1)	yes	NULL

### **rapa Application 2**

#### **Column Add**

Column Name	Description	Oracle Datatype	Oracle Allow Null	Sybase Datatype	Sybase Allow Null	Initial Value
pmt_hier_s	Payment hierarchy	CHAR(4)	yes	char(4)	yes	NULL

### **rba Batch Sale of Asset**

#### **NEW TABLE**

#### **Table Add**

Table Name	Description
rba	Batch Sale of Asset



**rbb Batch Sale of Asset Reversal****NEW TABLE****Table Add**

Table Name	Description
rbb	Batch Sale of Asset Reversal

**rbg Batch General Ledger Adjustment****NEW TABLE****Table Add**

Table Name	Description
rbg	Batch General Ledger Adjustment

**rbga Batch General Ledger Adjustment Detail****NEW TABLE****Table Add**

Table Name	Description
rbga	Batch General Ledger Adjustment Detail

**rcc Custom Code****Data Add**

rcc_flg_c	cd_type_s	cd_shrt_s	cd_long_s	security_l
1	OFFSET.IDR		IDR OFFSET ACCOUNTS	4
2	OFFSET.IDR	RCR1	77 RCR1 INC/PAY	0
2	OFFSET.IDR	RCR2	78 RCR2 INC/PAY	0
2	OFFSET.IDR	RCR3	79 RCR3 INC/PAY	0
2	OFFSET.IDR	RC04	157 RCR4 INC/PAY	0
2	OFFSET.IDR	RC05	158 RCR5 INC/PAY	0
2	OFFSET.IDR	RC06	159 RCR6 INC/PAY	0
2	OFFSET.IDR	RC07	160 RCR7 INC/PAY	0
2	OFFSET.IDR	RC08	161 RCR8 INC/PAY	0
2	OFFSET.IDR	RC09	162 RCR9 INC/PAY	0
2	OFFSET.IDR	RC10	163 RCR10 INC/PAY	0
2	OFFSET.IDR	RC11	164 RCR11 INC/PAY	0
2	OFFSET.IDR	RC12	165 RCR12 INC/PAY	0
2	OFFSET.IDR	RC13	166 RCR13 INC/PAY	0
2	OFFSET.IDR	RC14	167 RCR14 INC/PAY	0
2	OFFSET.IDR	RC15	168 RCR15 INC/PAY	0
2	OFFSET.IDR	ICRC	239 INTER COMP RECV	0
2	TRN	260	IBL SUSP PRN PMT WUP	0
2	TRN	267	IBL PMT - PRN WRT UP	0
2	TRN	460	IBL SUSP PMT REV WUP	0
2	TRN	467	IBL PMTREV PRN WRTUP	0

**rcg Custom General****Column Add**

Column Name	Description	Oracle Datatype	Oracle Allow Null	Sybase Datatype	Sybase Allow Null	Initial Value
can_tax_round_c	Canada tax rounding (Y/N)	CHAR(1)	yes	char(1)	yes	'N'

validate_vin_c	Validate VIN (Y/N)	CHAR(1)	yes	char(1)	yes	'N'
min_lower_char_in_pwd_l	Minimum lower case characters in password	NUMBER (10)	yes	integer	yes	0

## rcm Lessee Credit Bureau Extract

### NEW TABLE

#### Table Add

Table Name	Description
rcm	Lessee Credit Bureau Extract

## rcc Historical Asset

#### Column Add

Column Name	Description	Oracle Datatype	Oracle Allow Null	Sybase Datatype	Sybase Allow Null	Initial Value
batch_s	Cash control batch number	VARCHAR2(20)	yes	char(20)	yes	NULL

## rcu Customer

#### Column Add

Column Name	Description	Oracle Datatype	Oracle Allow Null	Sybase Datatype	Sybase Allow Null	Initial Value
pmt_hier_s	Payment hierarchy	CHAR(4)	yes	char(4)	yes	NULL

## reqa Asset 2

#### Column Add

Column Name	Description	Oracle Datatype	Oracle Allow Null	Sybase Datatype	Sybase Allow Null	Initial Value
payoff_st_stax_d	State sales tax in payoff	NUMBER (15,2)	yes	double precision	yes	0.0
payoff_ct_stax_d	County sales tax in payoff	NUMBER (15,2)	yes	double precision	yes	0.0
payoff_cy_stax_d	City sales tax in payoff	NUMBER (15,2)	yes	double precision	yes	0.0
recalc_payoff_stax_rev_c	Recalculate payoff sales tax in reversal (Y/N)	CHAR(1)	yes	char(1)	yes	'Y'
last_eoy_year_s	Last year for which Clear YTD Fields has run	CHAR(4)	yes	char(4)	yes	NULL

## rfl Group

#### Column Add

Column Name	Description	Oracle Datatype	Oracle Allow Null	Sybase Datatype	Sybase Allow Null	Initial Value
pmt_hier_s	Payment hierarchy	CHAR(4)	yes	char(4)	yes	NULL

## rhm Historical Lessee Credit Extract

### NEW TABLE

#### Table Add

Table Name	Description
------------	-------------

rhq	Historical Lessee Credit Extract
-----	----------------------------------

## rhqa Historical Asset for Lease Extension/Reversal 2

### Column Add

Column Name	Description	Oracle Datatype	Oracle Allow Null	Sybase Datatype	Sybase Allow Null	Initial Value
payoff_st_stax_d	State sales tax in payoff	NUMBER (15,2)	yes	double precision	yes	0.0
payoff_ct_stax_d	County sales tax in payoff	NUMBER (15,2)	yes	double precision	yes	0.0
payoff_cy_stax_d	City sales tax in payoff	NUMBER (15,2)	yes	double precision	yes	0.0
recalc_payoff_stax_rev_c	Recalculate payoff sales tax in reversal (Y/N)	CHAR(1)	yes	char(1)	yes	'Y'
last_eoy_year_s	Last year for which Clear YTD Fields has run	CHAR(4)	yes	char(4)	yes	NULL

## rhsh Historical Lease for Lease Extension/Reversal 3

### Column Add

Column Name	Description	Oracle Datatype	Oracle Allow Null	Sybase Datatype	Sybase Allow Null	Initial Value
last_eoy_year_s	Last year for which Clear YTD Fields has run	CHAR(4)	yes	char(4)	yes	NULL
pmt_hier_s	Payment hierarchy	CHAR(4)	yes	char(4)	yes	NULL

## rlsb Lease 3

### Column Add

Column Name	Description	Oracle Datatype	Oracle Allow Null	Sybase Datatype	Sybase Allow Null	Initial Value
last_eoy_year_s	Last year for which Clear YTD Fields has run	CHAR(4)	yes	char(4)	yes	NULL
pmt_hier_s	Payment hierarchy	CHAR(4)	yes	char(4)	yes	NULL

## rno Note

### Column Add

Column Name	Description	Oracle Datatype	Oracle Allow Null	Sybase Datatype	Sybase Allow Null	Initial Value
last_eoy_year_s	Last year for which Clear YTD Fields has run	CHAR(4)	yes	char(4)	yes	NULL

## rpn Check Payment Detail

### Column Add

Column Name	Description	Oracle Datatype	Oracle Allow Null	Sybase Datatype	Sybase Allow Null	Initial Value
unit_s	Asset	CHAR(10)	yes	char(10)	yes	NULL

## rpt Payment Hierarchy

### NEW TABLE

### Table Add

Table Name	Description
rpt	Payment Hierarchy

### Column Add

Column Name	Description	Oracle Datatype	Oracle Allow Null	Sybase Datatype	Sybase Allow Null	Initial Value
rsc_flg_c	RSC flag (O/R/S) O - operator with own credentials R - role with no credentials S - shared credentials operator	CHAR(1)	yes	char(1)	yes	'O'
role_s	Role	CHAR(12)	yes	char(12)	yes	NULL
credent_user_pwd_s	Hashed key for user of shared credentials	CHAR(12)	yes	char(12)	yes	NULL

**Column Add**

Column Name	Description	Oracle Datatype	Oracle Allow Null	Sybase Datatype	Sybase Allow Null	Initial Value
can_tax_round_c	Canada tax rounding (Y/N)	CHAR(1)	yes	char(1)	yes	'N'

**Column Add**

[illegible]

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