

Release Notes

This manual was produced using *MS Word®* and *Doc-To-Help®*, by Vanguard Business Analytics, Inc.

Vanguard Business Analytics, Inc. All rights reserved.
Vanguard Business Analytics, Inc. (a division of Exact Software)
800 Roosevelt Road
Building E
Glen Ellyn, IL 60137
630-545-1600 (Fax 630-545-1681)
E-Mail: support@vanguardba.com

Graphical Performance Series® is a registered trademark of Vanguard Business Analytics, Inc.
2006 Vanguard Business Analytics, Inc. All Rights Reserved
Last Revision Date: Apr. 12, 2006
Version 4.5
Printed in the United States of America

Table of Contents

<i>Introduction</i>	4
Document Purpose	4
4.5 Core Features and Benefits	5
4.5 General Discussion	5
Q. Why did Vanguard release a new (4.5) version so quickly after 4.4, which was released in late 2005?	5
Q. Are most of the new features Exact-specific, or are they also applicable to non-Exact customers?.....	5
Q. What does it take to upgrade to 4.5?.....	5
4.5 End User Product Features and Benefits	6
New Module: Business User Interface Plus.....	6
Web-accessible Resource Center	6
User-Configurable Content Manager.....	7
Favorite Dimensions	7
Toolbar buttons for Ad Hoc Tasks	7
Faster saving of large .PTVW files.....	8
Refresh Wizard	8
New Simplified Content Filters Screen	8
Allow End Users to Manage Object Repository	8
View Manager options to focus on only the Metadata Elements Actually Used.....	9
4.5 Administration User Product Features and Benefits	9
Windows Authentication	9
External User Synchronization	9
Relational Bulk Copy Subsystem	10
Enhanced Client Interoperability	10
Improved Schedule Status Reporting	11
4.5 Integration Development	12

Introduction

Document Purpose

The purpose of this document is to acquaint you with the contents of Release 4.5.

In addition to the standard product documentation, a number of other release-specific documents may also be included with your 4.5 distribution:

Document Contents	Document Name
Detailed list of software updates (new features and defect corrections) for Windows Core Software	4-5_Core_Updates.pdf
Detailed upgrade instructions for Windows Core Software	release 4-5 Upgrade Instructions.pdf
Detailed upgrade instructions for Specific Integrations	Each of the various integrations includes an integration-specific upgrade document.
Last-minute release errata (always read if present for your distribution)	Readme*.txt

4.5 Core Features and Benefits

This section discusses the major 4.5 features and benefits of the core modules—those software modules that are independent of the various integration modules that many customers also license. For a more comprehensive list of features and corrections, please review the [4-5_Core_Updates.pdf](#) document.

4.5 General Discussion

Q. Why did Vanguard release a new (4.5) version so quickly after 4.4, which was released in late 2005?

A. Vanguard's (Q4, 2005) acquisition by Exact Software resulted in the Vanguard Development team working closely with the Exact Development teams to identify a core feature set of immediate value to both Vanguard's existing customers and the existing Exact Software customers. Release 4.5 is the fruit of that collaborative effort, and contains many ease of use features that will benefit all users. The focus of 4.5 is to improve the user experience for end users, and to facilitate integration with other systems.

Q. Are most of the new features Exact-specific, or are they also applicable to non-Exact customers?

A. ALL core platform features, including those initiated by Exact, have been implemented in a generic way, and can be used by customers with non-Exact ERP systems. For example, a new feature that synchronizes user Information with the Macola ES system was implemented generically as "External User Synchronization"—which can be used by *any* partner or customer.

Q. What does it take to upgrade to 4.5?

A. The upgrade process has never been easier. As always, the core module upgrade is independent of any particular back office integrations, giving you the flexibility to

deliver exciting new functionality to your end users with minimal IT overhead. Additionally, the automated database upgrade process (which updates the Network, Metadata, and Environment database) provides full support all the way back to release 4.2.

Special care has been taken in 4.5 to retain content compatibility with release 4.4. This means that you can decide to leave your Business Users at 4.4 and initially upgrade all other modules to 4.5 (because the 4.4 Business UI can consume 4.5 .PTVW files refreshed by eDeployment). Then you can roll out 4.5 Business UI incrementally. Except for Business UI as noted, all other modules must be upgraded as a group to 4.5 (for example, a 4.4 Power UI cannot connect to a 4.5 RDIS).

See your brand-specific upgrade instructions document for more details.

4.5 End User Product Features and Benefits

New Module: Business User Interface Plus

Business User Interface Plus is an exciting new module that allows users to optionally sign on to RDIS and refresh their .ptvw content. It is a secure client that requires at least one successful logon to RDIS to cache the security information, metadata, and sign-on information. It can then be used off-line, once the initial logon has been executed.

The new Business UI+ module fills a gap in the product line. It differs from Power UI in that it cannot be used to create new .PTVW content (however users can add their own calculated cube facts, unlike Business UI). Additionally, Business UI+ can be licensed controlled on a concurrent basis (in addition to named).

The following features apply to these modules:

- Power User Interface
 - Business User Interface Plus
 - Business User Interface
-

Web-accessible Resource Center

The Resource Center is a new web site that lets users access up to date product information, directly from within the client software modules (Power UI, Business UI Plus, Business UI, and Administration UI). This web site will host an ever-expanding wealth of online resources such as FAQ lists, online introductory training

videos, product news, tips and techniques—all designed to reduce the time and expense required to realize and extend the value of your information.

The Resource Center is accessible via an integrated browser (IE), which is implemented inside a non-modal “stay on top” form, to allow for easy “in context” viewing of online videos and other reference and tutorial content. Additionally, it can be configured to launch your favorite browser outside of the client application.

User-Configurable Content Manager

The new Content Manager, accessed by clicking on the toolbar’s “Globe” button, is a floating screen which shows all of your views in one place, allowing you to easily locate and open your content. It also monitors your content use, and lets you sort on any columns you like, including “Date/Time Last Accessed” (so your most recently accessed content stays at the top). The Content Manager provides a streamlined entry point for external applications; in fact, it is the screen that Exact Macola Progression users launch into.

The powerful search feature automatically indexes the structural information inside your .PTVW files—including the textual description, cube layout names, report names, graph names, and all of their descriptions. Simply start typing in the search box and only files containing the text you have typed are displayed (yes, we use iTunes too!). The indexer also indexes the metadata identifiers inside of the .PTVW files, so consultants and customers who are familiar with the metadata can quickly and easily do an ad hoc “where used” analysis to find BI views that use specific Information Types, Dimensions, or Facts (or any combination!).

Favorite Dimensions

Many customers build .PTVW files that include a dozen or more dimensions. While many dimensions are great for flexible analysis, scanning a long dimension list slows down users when it comes to ad hoc filtering. The new favorite dimensions feature allows each user to identify the dimensions that he commonly filters on, and then choose to list only those dimensions when filtering (this applies to both Content Filters and Cube Filters). Of course, for the occasionally times when you want to filter on a dimension not on your favorites list, the complete list is just a click away!

Toolbar buttons for Ad Hoc Tasks

Users should not have to go into the “Cube Settings” dialog to achieve their ad hoc goals. To streamline the ad hoc analysis experience, toolbar buttons have been added for these common operations:

- Sort by Dimension(s)
- Sort by Selected Fact (descending)
- Sort by Selected Fact (ascending)
- Save Cube Layout

Faster saving of large .PTVW files

The save logic has been enhanced to only save the cube data when it has been refreshed (or a user calculated field has been added). This means that new cube layouts, graphs, and reports can be quickly added to .PTVW files with large amounts of data. Prior to this improvement, the programs would save the cube data (the most time-consuming part of the process), even when nothing in that data had actually changed. This improvement will save lots of time!

The following features apply to these modules:

- Power User Interface
 - Business User Interface Plus
-

Refresh Wizard

The new Refresh Wizard, accessed by clicking on the toolbar “wand” icon, integrates all view refresh options on one easy-to-use tabbed dialog. It allows users to easily review and change options that affect view refreshing, prior to initiating the refresh of a .PTVW. This dialog delivers a much more streamlined user interaction than before, and it provides a comfortable transition to Business Intelligence for users familiar with report writer prompt screens.

Like the Content Manager, this screen is available as an entry point from external applications. In fact, the Exact Macola ES product launches into this dialog.

New Simplified Content Filters Screen

A simplified version of the Contents Filters screen may be accessed from the Refresh Wizard, by double-clicking on a dimension from the “Dimension Content Filters” tab. This new screen shows only the dimensions that apply to the current active view, and omits little used options, to optimize the most common user goals. Additionally, the Site Selection control is suppressed when only a single site is present.

Note that the traditional Content Filter Manager has been retained. Both have been improved to allow the user to double-click on a dimension to bring up the available values (as opposed to having to select the dimension and then click on the exclamation point button).

Allow End Users to Manage Object Repository

The ability to manage .PTVW files in the eDeployment Object Repository has been added to the Power User Interface and the Business User Interface Plus modules, for logged on users with the “Environment Details” privilege only. Such users can now update .PTVW files to (and retrieve .PTVW from) the Object Repository, without having to give them access to the Administration User Interface.

The following feature applies to the Power User Interface module only:

View Manager options to focus on only the Metadata Elements Actually Used

As the standard integrations increase in breadth, the amount of metadata that Power Users interact with is increasing. To help manage the process of easily identifying and accessing metadata, the View Manager right-click menu (on the Information Types tab) includes new metadata display options that:

- Automatically track when each metadata element is used
- Let you display and sort on this usage information
- Let you suppress the display of metadata elements that you have never used

4.5 Administration User Product Features and Benefits

This section describes the 4.5 features and benefits that are related to administration of the product and its integration into the overall IT infrastructure.

Windows Authentication

This option enables RDIS to authenticate users against their Windows password, instead of against the application-specific password stored in the GSUSER table (stored in the BI_User database). It is enabled from the RDIS Setup Wizard.

Windows authentication is very powerful and convenient because it allows users to manage their passwords in one place (the operating system). A prerequisite to implementing this feature is that all of your GSUSER User Profiles (column GUUSPR) must be set up to correspond to your Windows User Profiles. Existing customers who have not followed this convention may “mass update” GSUSER.GUUSPR (based on a cross-reference table, for example), and that update will automatically flow everywhere in the database due to the cascading referential integrity.

External User Synchronization

External User Synchronization enables simplified user administration by automatically extracting and synchronizing user information from any number of interfaced Sites. This feature is enabled at the Site level, and the user synchronization interface may be manually launched from within the Network application (option “System Monitoring and Maintenance / Manage External User Synchronization”). Additionally, the interface is schedulable from within the optional eDeployment module.

At this time, the user synchronization interface has been activated for the Exact Macola ES product only. It enables basic user administration to be performed from within Macola ES, with the following information automatically synchronized:

- user email address,

- module licensing attributes (based on corresponding roles), and
- Environment / Whse / Site access permissions (based on the Site(s) being synchronized)

The interface manages the addition, maintenance, and deletion of the external user information,

Relational Bulk Copy Subsystem

The schedulable External User Synchronization feature described above is built on top of a new generic “bulk copy” subsystem within eDeployment. This data-driven subsystem can be used to schedule the reliable copying of ODBC-accessible data from any data source to any other. Since RDIS is used as the transport, efficient data copy across wide area networks is easily achieved (from/to data sources can be connected to different RDISes!). Average throughput for local data sources is about 1000 rows per second in lab testing.

This new subsystem can be very useful for propagating centrally maintained corporate master file information to multiple sites, importing Excel spreadsheets into enterprise databases, and any other basic data copy tasks. It can be used in conjunction with Events Processor to launch the initial data copy and then automatically launch one or more publishing schedules upon completion of a "data copy" schedule.

The new Bulk Copy subsystem is not intended as a full-featured ETL tool, but it can serve many basic data copy needs very well. In its first release, it is intended as a “consultant’s tool”, since we have not provided a user-friendly mechanism to insert rows into the BULK_COPY_CONTROL table (which drives the processing).

Enhanced Client Interoperability

The client user interfaces (Power UI, Business UI+, and Business UI) can now be called from other applications and passed contextual information. This information can include the cube layout / report / graph to open and any cube filter values to apply.

For example, an Order Entry application can now be integrated to call into Business UI+ requesting “show me View A, Cube Layout B, filtered to Customer C”. This capability can also be enabled from Web Access Server, enabling seamless filtered drilling from dashboards.

Filter values passed in from external applications show up as an “Ad Hoc” cube filter within the client program (which can then be locked and applied to other views, if desired).

Improved Schedule Status Reporting

The eDeployment Navigator Summary screen has been improved to more intelligently present status information, enabling schedule status to be clearly communicated at a glance.

4.5 Integration Development

This section discusses 4.5 development that involves new or improved Integration Modules and Business Intelligent (BI) Content (standard .PTVW files).

The 4.5 integration development effort has focused on building out integration modules and content for the Exact product lines, specifically Macola Progression, Macola ES, and Globe Enterprise. This integration effort is coordinated with the spring 2006 release of those product lines, and will be finalized when those products ship in Q2.

We continue to maintain and enhance all of the supported integrations. We are not packaging and releasing any cumulative integration updates to coincide with the 4.5 core platform release.