

i2 ChartExplorer 2

Release Notes

Version 2.0.1

June 2007

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i2 ChartExplorer is a powerful application that uncovers high value information stored in i2 charts and other documents. It can help you to find, explore and reuse information that currently exists in files stored on desktops and servers within your organization.

ChartExplorer 2 includes new features and enhancements, and provides compatibility with other i2 products. In addition, this release also addresses several of the issues reported since the previous release as well as incorporating fixes made prior to that release.

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What's New In This Release?

The following table summarizes the *ChartExplorer 2* release:


Version	Release Date
<i>i2 ChartExplorer 2.0.1</i>	June 2007

The following new and updated features have been included in *ChartExplorer 2*.

Improved and more Flexible Deployment

The Windows (MSI) compliant installer provides faster installation, as well as offering integration with enterprise application deployment technologies.

Support for Inaccessible Folders

If a folder added to *ChartExplorer* is deleted, or access to the folder is prevented due to network problems or changes to access permissions, an inaccessible folder icon  is displayed before the folder name in the Explorer Navigation Pane. If a folder becomes accessible again after experiencing network problems, you do not need to wait until the contents of the folder has been re-indexed. You can start exploring, searching, or responding to alerts straight away.

Print from the Preview Panes and Workpad

You can print the contents of the Chart Preview pane, Link Preview pane and File Summary pane. This means that you do not have to open charts in *i2 Analyst's Notebook* or *i2 ChartReader* before you can print them, and enables you to select linked items that exist in different charts and print them on the same page. You can also print the contents of the Workpad, which contains a selection of references most relevant to your current analysis.

Copy Bitmaps to Other Applications

Items selected in the Preview Pane or the Workpad can be copied as bitmaps and pasted into other applications that support embedded OLE objects, such as Microsoft Word. This allows you to illustrate the documents, reports or PowerPoint presentations with extracts of your findings, and share them with your colleagues.

Search Data Records

Increase the depth of your analysis by searching for database record information held in your *i2* charts.

Extending a Selection in the Chart Preview Pane

The way in which items can be selected in the Chart Preview pane has been enhanced. You can now extend your current selection in the Chart Preview pane to include links connecting an entity, and the entities at both ends of a link.

System Requirements

These are the recommended system hardware requirements for *ChartExplorer*.

Requirements

1.4 GHz processor (1.8 GHz recommended)

512 MB RAM (1 GB RAM recommended)

The processor and memory requirements increase with the number of files indexed and the frequency that the files and folders change.

100 MBytes free disk space for installation, plus space to store chart data (if not already installed, add: 280 MB for .NET 2 Framework) **plus**

Disk space to store the index. For each user, the size of the index depends on the volume of files added to *ChartExplorer*.

The index that is maintained by *ChartExplorer* is stored locally and contains data from all files that the user designates.

XGA capable graphics card (1024 x 768 high color (16 bit)) and color monitor

USB Port or Parallel Printer Port (for local dongle)

CD-ROM drive or network access (for installation)

Note: For better performance and for running a combination of i2 products, a higher specification is recommended:

Requirements

At least 2 GHz processor computer

At least 1 GB RAM

At least 1 GB free disk space for installation plus space to store chart data (if not already installed, add: 280 MB for .NET Framework). Total disk space requirements depend on number of i2 products to be installed.

SXGA capable graphics card (1280 x1024 high color (16 bit)) and color monitor

These are the supported operating systems for *ChartExplorer*.

Operating System (including minimum service packs)

Windows Vista Business/Enterprise/Ultimate x86

Windows XP Professional x86 SP 2

Windows 2000 Professional SP 4

Windows 2000 Server/Advanced Server SP 4 with Terminal Services optionally with Citrix MetaFrame Presentation Server 4.0

Windows Server 2003 and Windows Server 2003 R2 Standard/Enterprise x86 SP1 with Terminal Services optionally with Citrix MetaFrame Presentation Server 4.0

ChartExplorer is supported on the Western Europe & USA regional versions of the supported operating systems. The initial release will be supported on English versions of Windows Vista. Support on English versions is limited, and there are known issues that we plan to fix in later releases. *ChartExplorer* is User Access Control (UAC) compliant.

ChartExplorer requires that Microsoft .NET Framework 2.0 is present on the installation system. A compatible version of Microsoft .NET Framework is included on the CD.

The documentation provided with *ChartExplorer* is also available electronically in Adobe PDF format. In order to display this documentation, a PDF viewer must be present on the installation system. Adobe Reader version 8 is included on the CD.

ChartExplorer can work with documents created by the following versions of Microsoft Office:

- Office 2000 (all editions)
- Office XP (all editions)
- Office 2003 (all editions)

ChartExplorer requires that Microsoft Internet Explorer 6.0 or later is present on the installation system. However, Internet Explorer does not need to be the default Web browser. A compatible version of Internet Explorer is included on the CD.

Authorization Information

Updated NetHASP License Manager

If you use a NetHASP authorization solution (a red network dongle), you are required to use License Manager 8.20, or higher.

Version 8.31 can be found on the product CD in the following location:

CD Drive:\Dongle\HASP Server\Windows

Further details regarding the installation of the License Manager are available in the *NetHASP License Manager Guide*.

Note: Novell Netware is no longer supported as a platform for running NetHASP authorization. License Manager must run on a Windows platform. The version on the CD is not fully supported on Windows Vista.

NetHASP timeout

A timeout value is set for each client workstation so that the NetHASP server releases permits after 60 minutes of application inactivity. This prevents permits from being held indefinitely if they are not released at the end of a session.

Documentation

Manuals

The manuals in the documentation have been updated. All manuals are supplied in PDF format and are typically installed to:

C:\Program Files\i2 ChartExplorer 2\Documentation\User Guides

The following manuals exist for *ChartExplorer*:

Document Title	Part Number
<i>i2 ChartExplorer 2 Release Notes</i>	1361
<i>i2 ChartExplorer 2 Quick Start Guide</i>	1360
<i>i2 ChartExplorer 2 User Guide</i>	1359

i2 user guides are example based and are designed to help users learn how to use the software. You should install the example material so that users can work through the examples. The example material is described below.

Note: Please make sure that at least one electronic copy (PDF) of the product documentation is installed in a central location and is accessible to all users.

Example material

In some examples in the user guides, the first thing the user is asked to do is open an existing chart. The example material is typically installed to:

C:\Documents and Settings*User Name*\Local Settings\Application Data\i2\i2 ChartExplorer 2\Example Material

Online help

Comprehensive online help is available from within *ChartExplorer* that provides reference information for all of the product's functionality.

White Papers

The following white papers are available from your supplier:

White Paper Title	Part Number	On the CD?
<i>i2 ChartExplorer 2 Product Overview White Paper</i>	1402	No
<i>i2 ChartExplorer 2 Network Configuration White Paper</i>	1423	No
<i>i2 ChartExplorer 2 Deployment and Installation White Paper</i>	1424	No

Installation

Before installing *ChartExplorer*, please check that your system meets all of the requirements described in System Requirements on page 3.

Note: Administrator privileges are required in order to install ChartExplorer.

Windows Terminal Services

If you are installing using Terminal Services then you must install using the Add or Remove Programs facility of Control Panel. To complete the installation *ChartExplorer* users must log off and log on again.

If you are deploying on Citrix, you must refer to the *i2 Products Packaging and Deployment Guide* for information on how to publish the application and end user profile information.

Adobe PDF iFilter

You need to install Adobe PDF iFilter 8 to allow searching of PDF documents by *ChartExplorer*. This is automatically installed as part of Adobe Reader 8, which is provided on the *ChartExplorer* installation CD.

1. If you have already installed *ChartExplorer* and added folders to it, remove any folders that contain PDF documents, and close *ChartExplorer*.
2. Uninstall any previous versions of Adobe PDF iFilter or Adobe Reader.
3. Run the `AdbeRdr80_en_US.exe` file, on the product CD in the Adobe Reader 8 folder, and follow the on-screen instructions. By default, Adobe Reader will be installed in `C:\Program Files\Adobe`, along with a `ReadMe.htm` file containing additional information.
4. After the installation finishes, restart *ChartExplorer*.
5. Select **Tools ► Options**, and from the Index File Types list, turn on the **Adobe Acrobat Documents (.pdf)** check box. Click **OK** to close the dialog.
6. Add any folders previously removed.

For additional information, refer to the Adobe website: <http://www.adobe.com/support/>.

Installation steps

Using Setup.exe

If *ChartExplorer* is to be used by a community of users, perform a customized installation as described in the *Customizing install* section. Otherwise, to install *ChartExplorer*:

1. Close all applications that you might have open.
2. If present, remove any USB Authorization Device (Dongle).
3. Insert the product CD into your computer's CD drive.

The installation will start automatically. If it does not start automatically, you need to browse to the CD to run `Setup.exe` in the folder `i2 ChartExplorer 2`.

4. Follow the prompts to complete the installation.

The following shortcuts will be installed:

i2 ► i2 ChartExplorer 2 ► i2 ChartExplorer 2	Start <i>i2 ChartExplorer</i>
i2 ► i2 ChartExplorer 2 ► Documentation	Access the product documentation in PDF format

Automated and silent installs

To install an i2 product with all of its default settings, but with no need for intervention from the user, you can perform a "silent install" like this:

```
Setup.exe /s /v/quiet
```

In terms of the installed product, issuing this command has the same effect as double-clicking the file and giving the simplest possible (affirmative) response to every question. However, the user sees no feedback at all about the installation process until the product shortcut appears on the **Start** menu.

To provide the user with a little more information about what is happening to their computer (but still using default options, and allowing no intervention), you can use `/passive` instead of `/quiet`:

```
Setup.exe /s /v/passive
```

If you have customized the *ChartExplorer* installation so that certain options are pre-configured for install, you cannot use `Setup.exe` to install it without user intervention. You can perform an automated and silent install using the MSI Installer Package. For more details refer to the *i2 Products Packaging and Deployment Guide*.

Using Windows Installer (MSI)

This version of *ChartExplorer* is available as an MSI Package. For more details on installing using Windows Installer, please refer to the *i2 Products Packaging and Deployment Guide*.

Third party software

For full details of the third party software installed and how to prevent its installation, refer to the *i2 Products Packaging and Deployment Guide*.

Customizing installed files

You can customize the *ChartExplorer* installation so that certain options are pre-configured for install. To do this, you need to install *ChartExplorer* to a shared network location using the command line, and then modify the options file, `options.xml`. You can then install the customized version on each computer using the MSI Windows Installer Package.

The following options are considered to be the most likely you will require for customized installation:

- Specifying folders that will be indexed by *ChartExplorer*
- Specifying a shared folder to store search logs for groups of users

For more details on options in the `options.xml` file, refer to the *i2 ChartExplorer 2 Deployment and Installation White Paper*.

To install *ChartExplorer* to a shared network location using the command line:

1. Insert the *i2 ChartExplorer 2* CD into the CD drive of your computer. The installation may start automatically, in which case it should be aborted by choosing the **Close** button.
2. From the **Start** menu, select **Run** to display the Run dialog.
3. Click **Browse** and navigate to your computer's CD drive. Double-click on `i2 ChartExplorer 2.msi`. The file path within double-quotes is displayed in the Open text box of the Run dialog.
4. Type `msiexec /a` before the `i2 ChartExplorer 2.msi` file path. For example:

```
msiexec /a "D:\i2 ChartExplorer 2.msi"
```
5. Click **OK** to start the InstallShield Wizard. At the Welcome page, click **Next**.
6. At the Network Location page, click **Change**. Browse to the shared network location that you want to install to, double-click on the folder and click **OK**.
7. At the Network Location page, click **Install**. Once the installation is complete, click **Finish**.

To modify the `options.xml` file:

1. Open the `options.xml` file in a text editor (such as Notepad). This file is located in:

```
Shared Network Folder\program files\i2 ChartExplorer 2\Install
```

2. To specify folders that will be indexed by *ChartExplorer*, find the line containing `<RootFolders />` and replace it with:

```
<RootFolders>
  <RootFolder Path="RootPath" />
</RootFolders>
```

where *RootPath* is the absolute path of the folder to be added to *ChartExplorer*. This path must be effective on all computers on to which *ChartExplorer* will be installed. For instance, if a drive letter is included, the drive must be defined on each computer. You can add more folders by adding further `<Root Folder>` elements.

You can also customize the installation to designate the folder where users will share their search logs. A common search log location allows a group of users to share information about the searches they run. For more information on this topic, refer to the *ChartExplorer* online help or the *i2 ChartExplorer 2 User Guide*.

3. To specify a search log location, find the line containing `<ActivityLogsDirectory />` and replace it with:

```
<ActivityLogsDirectory>shared folder</ActivityLogsDirectory>
```

where *shared folder* is the absolute path of the folder to store shared search logs. This path must be effective on all computers on to which *ChartExplorer* will be installed. For instance, if a drive letter is included, the drive must be defined on each computer.

4. Save and close the `options.xml` file.

You can now install the customized version of *ChartExplorer* on each of the computers, using the MSI Installer Package located at `Shared Network Folder\i2 ChartExplorer 2.msi`. For details on how to do this, refer to the *i2 Products Packaging and Deployment Guide*.

Modification and uninstallation

Installing *ChartExplorer* adds an entry to your Add or Remove Programs.

You can use this entry to:

- Change features of *ChartExplorer*
- Uninstall *ChartExplorer*

Uninstall ChartExplorer Prerequisites

Note: Before uninstalling *ChartExplorer*, make sure that it is not running in the background.

To uninstall the product, open Add or Remove Programs from the Windows Control Panel, and select **i2 ChartExplorer**.

User-specific data that is created and maintained by *ChartExplorer* is not removed when the product is uninstalled. This is typically located in:

```
C:\Documents and Settings\username\Local Settings\Application Data  
\i2\i2 ChartExplorer 2
```

and:

```
C:\Documents and Settings\username\Application Data\i2\  
i2 ChartExplorer 2
```

Note: When uninstalling *ChartExplorer*, this user-specific data will not be removed. To completely remove *ChartExplorer* from the computer, the user-specific data can be deleted manually.

Upgrade notes

You cannot modify earlier versions of *ChartExplorer* in order to upgrade to the functionality supported in *ChartExplorer 2*. We recommend uninstalling existing versions of *ChartExplorer* before installing this version. Running *ChartExplorer 2* and an earlier version of *ChartExplorer* simultaneously is not supported and has undefined behavior.

Compatibility notes

If you wish to use *ChartExplorer* in conjunction with other i2 products you must ensure that you are running the relevant versions of software. *ChartExplorer* is compatible for use with:

- i2 Analyst's Notebook 7
- i2 iBase 5
- i2 Analyst's Workstation 3
- i2 Analyst's Workstation TCA 2
- i2 iBridge 3
- i2 TextChart 3

i2 provides a means of installing *ChartExplorer* without manual intervention; see the *Automated and silent installs* on page 7.

Known Limitations

Microsoft Vista Known Limitations

ChartExplorer can be installed and operates on Windows Vista. However not all aspects of product behavior may be as effective as on Windows 2000 and XP. i2 is committed to updating its product suite to fully support Vista in the near future.

Known issues with *ChartExplorer* operating on Windows Vista are as follows:

Some third party components are not fully supported on Vista

Not all of the third party components that are installed and used by *ChartExplorer* are claimed to be supported on Vista by their suppliers. As they become available, i2 will include supported versions of third party applications in future releases. Unless stated in the known issues below, the third party components have not shown to cause issues.

What's This? Help is not natively supported in Windows Vista

ChartExplorer uses Windows Help (WinHlp32.exe) to deliver What's This? Help functionality. Microsoft is not shipping Windows Help with Vista. You can download a compatible version of Windows Help from Microsoft Download site:

<http://go.microsoft.com/fwlink/?LinkID=82148>

More information can be found on Microsoft Knowledge Base:

<http://support.microsoft.com/kb/917607>

Copy and paste of chart items to other i2 applications

Copy and paste of *Analyst's Notebook* chart items as entities or links is only supported from *ChartExplorer* to *Analyst's Notebook*. The operation is not supported to any other application and has undefined behavior.

Copy and paste of chart items as entities or links is only supported from the Chart Preview pane. Doing this operation from any other pane is not supported and has undefined behavior.

Note: Items selected in the Preview Pane or the Workpad can be copied as bitmaps and pasted into other applications that support embedded OLE objects. Unlike chart items copied as entities or links, item properties are not copied and pasted with the bitmap.

Backup applications may need to be configured to include user data

If the user's index needs to be backed up, the backup system must be configured to include the location of the user specific data. This is typically located in:

```
C:\Documents and Settings\username\Local Settings\Application Data  
\i2\i2 ChartExplorer 2
```

and:

```
C:\Documents and Settings\username\Application Data\i2  
\i2 ChartExplorer 2
```

User data does not roam with user

Users who have roaming profiles that allow them to log onto more than one computer are not able to carry their index between computers due to their size. Instead, these will be created and maintained on each computer that they log onto and run *ChartExplorer*.

Phrase matching may return too many matches

Searching for phrases (more than one word encapsulated in quotes, for example, "crimes in this area") may return more matches than expected. *ChartExplorer* will find files containing the phrase, but will also find additional matches within that file corresponding to the individual words that make up the phrase.

Adobe PDF file summary properties are not displayed

Adobe Acrobat stores file summary properties in an application-specific way which prevents *ChartExplorer* from accessing them. There is no known solution for this.

Adobe PDFs not indexed on Windows 2000

If you install Adobe iFilter 8 together with Adobe Reader on Windows 2000 using the default installation process, *ChartExplorer* cannot index PDFs. To fix this, you need to edit the location of the installed Adobe iFilter 8, using the System Properties dialog:

1. Select **Start ► Control Panel**, and double-click on **System** to display the System Properties dialog.
2. Click the **Advanced** tab to display the Advanced page, and click **Environment Variables** to display the Environment Variables dialog.
3. In the System variables list, select the **Path** variable and click **Edit** to display the Edit System Variable dialog.
4. Type the following text at the end of the path displayed in the **Variable value** text box:

;C:\Program Files\Adobe\Reader 8.0\Reader

Note: If Adobe iFilter 8 was installed at a different location on your computer, type this file path in the **Variable value** text box instead.

If you attempted to index PDFs before editing the location of the iFilter on your computer, you need to do the following to ensure that those files are indexed correctly:

1. Restart *ChartExplorer*.
2. Select **Tools ► Options**, and from the Index File Types list, turn off the **Adobe Acrobat Documents (.pdf)** check box. Click **OK** to close the dialog.
3. Select **Tools ► Options**, and from the Index File Types list, turn on the **Adobe Acrobat Documents (.pdf)** check box. Click **OK** to close the dialog.

Open File command is restricted when only i2 ChartReader is installed

The **Open File** command is ineffective for *Link Notebook 5* charts (.lnb files) and *i2 TextChart* visualizations (.tcv files) when the corresponding applications are not installed. To open such files in *i2 ChartReader*, start this application, and from the **File** menu, select **Open**.

OLE objects in charts are displayed in the Chart Preview pane

OLE objects in charts cannot be displayed in the Link Preview pane, File Summary pane or the Workpad. Use the Chart Preview pane to display OLE objects, or open the chart to access them.

Unaware of additional power2 data

Charts created with power2 products contain additional data in the form of semantic types. *ChartExplorer* will not index or search for this data. *ChartExplorer* is able to find all other data (entities, links, cards, attributes, data records) in these charts.

Indexing Excel Files without Microsoft Office Installed

Indexing Excel files when Microsoft Office is not installed has undefined behavior. If problems are encountered, remove the folders containing Excel files, install Microsoft Office, then add the folder previously removed.

Cover Sheet is only supported in ANB 7

The Cover Sheet functionality is only available if *ChartExplorer* is installed on a computer that has *Analyst's Notebook 7* installed. Upgrades for *Analyst's Notebook* are available from i2.

Searching using multiple + signs

When searching using multiple + signs, *ChartExplorer* finds multiple words that are in the same field within a file, not across the whole chart or document. For example, if you Type +GREEN +SMITH in the Search for box and click **Search**, GREEN and SMITH would only appear in a search result if they were both found in:

- the main body of a document, such as the text in a Microsoft Word document
- a single chart item property, for example, the chart item description
- a single file summary property, for example, the keywords field
- a single file custom property, for example, the classification field

Modifying ChartExplorer folders on Citrix

These issues affect *ChartExplorer* when it is installed on a computer running Windows 2003 Server with Citrix Metaframe 4.0:

- If a subfolder is added to a folder, the subfolder will not be displayed automatically in the Folders list of the Explorer Navigation Pane until the next time the folders are scanned. By default, folders are scanned every 60 minutes. For details of how to increase the frequency of automatic folder scanning, see the *i2 ChartExplorer Deployment and Configuration White Paper*. To refresh the Folders list manually and display the subfolder, select the folder to which it belongs in the Explorer Navigation Pane.
- If a folder becomes inaccessible because it has been renamed, moved or deleted, the inaccessible folder icon is not displayed in the Folders list, and selecting the folder does not display a message asking if you want to remove the folder from *ChartExplorer*.

Access permissions denied to Novell Netware folders

If access permissions are denied to a Novell Netware folder, *ChartExplorer* will treat the folder as if network problems were preventing access to it. For information on inaccessible folders, refer to the online help.

Changed regional settings and Microsoft .NET 2.0

If you customize the date or time regional settings on your computer, clicking on the Date Modified column heading displayed in the File List and Results List, or the Alert Date and Time column heading displayed in the Alerts List, may not sort the column contents as expected. This is caused by a Microsoft .NET Framework 2.0 issue. To fix this, reset your regional setting to their defaults.

Microsoft Office 2007 documents unsupported

ChartExplorer cannot work with documents created by Microsoft Office 2007.

Contacting i2

Technical support is available to anyone whose organization has opted for our annual support program. If you have a question and cannot find a solution in the online help, you can send an e-mail to the i2 Technical Support team.

- For customers in North and South America, e-mail support@i2inc.com.
- For customers in the UK or the Rest of the World, e-mail support@i2.co.uk.

Note: If your i2 software was purchased from one of our distributors, please contact your supplier for technical support.

i2 International and ChoicePoint Government Services Professional Consulting services work with customers to understand specific requirements and then determine the best methods to get these requirements met through custom development, on-site training, or alignment with the right system integrator or product vendor.

For further information, contact your i2 supplier, or visit the i2 Web site at: www.i2group.com.