

i2 iBase 5 Release Notes

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i2 iBase 5 is i2's investigative database. It provides capabilities to configure the database, capture the data, and perform analysis all in a controlled environment; it fully integrates with *i2 Analyst's Notebook 7*. There are three versions: *iBase Basic* which stores its data in Microsoft® Access, and *iBase Standard* or *iBase Premium* which can use either Microsoft Access or Microsoft SQL Server. This document provides information for all three products.

You do not need to uninstall your existing i2 software before installing *i2 iBase 5*. Existing *i2 iBase 4* security files and databases must be upgraded for use with *i2 iBase 5*. For details of upgrading and compatibility with previous versions and other i2 products, see *Installation* on page 12.

Note: *i2 Analyst's Workstation 3* users should normally install *iBase* using the *Analyst's Workstation* installer. We recommend that you read the *i2 Analyst's Workstation 3 Release Notes* for more details. If you need to install *iBase 5* using the *iBase 5* installer, for use with an *Analyst's Workstation 3* installation, then please contact i2 Technical Support for advice.

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Release Contents

The *iBase* 5 release includes the following program features—some of which are separately licensed:

Program feature	Description
i2 iBase 5	Use <i>i2 iBase</i> 5 to work with MS Access databases.
SQL Server Enabled	Use <i>i2 iBase</i> 5 to work with either MS Access or SQL Server databases.
Designer	Use <i>i2 iBase 5 Designer</i> to design and administer <i>iBase</i> databases and security files.
Tools	Use Audit Viewer and other tools to maintain <i>iBase</i> databases.
Scheduler	Use <i>i2 iBase 5 Scheduler</i> to schedule batch imports and exports.
Coordinate Extensions	Use <i>i2 iBase</i> 5 to store data entered using multiple coordinate systems, in the same <i>iBase</i> database.
Schema Update	Use <i>i2 iBase</i> 5 to update database schemas from a template (requires <i>i2 iBase 5 Designer</i>).
Database Replication	Use Microsoft SQL Server merge replication to enable distributed use of <i>iBase</i> (requires the SQL Server Enabled feature).
i2 iBase GIS Interfaces 2	Interface to GIS products. See the <i>i2 iBase GIS Interfaces 2 Release Notes</i> for details.
Administration Center	Documentation for <i>iBase</i> administrators.

Note: *iBase Coordinate Extensions* was developed using GEOTRANS v2.4, a product of the National Geospatial Intelligence Agency and U.S. Army Engineering Research and Development Center. Use of GEOTRANS in connection with the *iBase* software does not indicate endorsement or approval of the product by the Secretary of Defense or the National Geospatial Intelligence agency.

What's New In This Release?

iBase 5 is a major product release that includes new features and enhancements. In addition, this release also addresses several bugs reported in previous releases.

The following table summarizes the *iBase* 5 releases:

Version	Release Date
<i>i2 iBase</i> 5.0.1	June 2007

New features

Enhancements for system administrators

The Windows (MSI) compliant installer speeds up the installation of *iBase* and allows integration with enterprise application deployment technologies.

It is now possible to copy and keep synchronized the schema of a main database, for example, at a head office, with copies of the database on remote machines or laptops. The separately licensed Schema Update tool allows the schema of the copy databases, including their folder objects, to be synchronized with changes made in a main database.

A new online documentation resource, the *Administration Center*, is specifically designed for people who need to administer *iBase* databases; installation is optional.

Enhancements for database designers

You can create SQL Server databases that are partitioned by case. Access to records is controlled on a case-by-case basis. Users can perform analysis on a single case using read/write access, or across multiple cases using a read-only Multi-Case Analysis mode.

You can improve the usability of your database design (and the consistency of the data) by adding filtered pick lists where the list item selected by the user controls what subsequent options are available. This can speed up data entry and reduce the number of data entry errors. The facility to add descriptions to entity and link types for display as tooltips in *iBase* also reduces errors by helping users to select the correct types.

You can now enter coordinate data that is based on more than one coordinate system, and convert it to a standard format. Coordinates in the standard format can be used to plot points on maps, and *iBase* users can perform queries to find items in a defined area or near a specified place. Input of this data requires a special Coordinate field type. These features are separately licensed.

A new manual, the *i2 iBase 5 Designer Guide*, is also provided.

Improved usability for data entry users and analysts

Changes in the areas of queries, pick lists, icons, folder objects and reporting are intended to make data entry and analysis more accurate. When querying data, specific records can be excluded from the results of the query. Complex operations, such as building up a report in Microsoft Access format, is now made more efficient. In Full-Text Search, the scope of searches can be narrowed to just the fields likely to hold the data for which the user is searching; these field selections can be saved for re-use.

Improved performance

Performance is improved in some areas so that operations such as performing queries, batch deletion, and duplicate checking can be completed more quickly in some circumstances. In particular, bulk import (SQL Server 2005 databases only) speeds up large data imports—bulk importing is particularly suited to operations such as overnight updates of large databases using *iBase Scheduler*, at times when there are no users accessing the databases.

Closer integration between iBase and TextChart

iBase and *TextChart* are now fully integrated. The streamlined facilities allow for a direct real-time connection between *TextChart* 3 and the *iBase* 5 database to ensure that unstructured text can be rapidly entered into the *iBase* database.

power2 enhancements

There are some additions to the power2 functionality. Users in SQL Server databases, can search for people's names and return results using lists of name variants, to find all the different spellings and variations of a name. They can also use semantic types in queries. For example, they can search on "Person" as shorthand for all entity types that are assigned the Person semantic type such as Policeman, Fire crew, Victim, Nominal, Suspect or Witness. Semantic queries can be chained with traditional *iBase* queries.

Semantic types are now used in the *iBase* Browse and Records dialogs.

Notes for new *iBase* users

iBase has a number of features which may be configured in order to fully exploit them, for instance charting to *Analyst's Notebook*. You may initially work with the system defaults and configure the additional features over time to steadily improve the productivity of the system.

iBase installs an example database, the User Guide database, which shows a number of the configuration options in operation. This example database is the basis of the tutorials provided by the *i2 iBase 5 User Guide*, *i2 iBase 5 Reporting Guide*, and the *i2 iBase 5 Importing Guide*. For detailed information on this database, see *Examples* on page 10.

Notes for existing users

For information on upgrading from *iBase* 4 and compatibility with *Analyst's Workstation 2*, see page 13.

Compatible companion products

You may have licensed one or more *iBase* companion products.

Older versions of companion products work exclusively with older versions of *iBase*. In order to use these products with *iBase*, you must install these updated versions.

i2 Analyst's Notebook 7

i2 iBridge 3

i2 TextChart 3

i2 ChartExplorer 2

System Requirements

iBase clients

These are the recommended system hardware requirements to run only *iBase*:

Requirement
1.4 GHz processor computer
512 MBytes RAM
500 MBytes free disk space for installation, plus space to store chart data (if not already installed, add: 280 MB for .NET 2 Framework)
XGA capable graphics card (1024 x 768 high color (16 bit)) and color monitor
Mouse or Trackball
USB Port or Parallel Printer Port (for local dongle)
<i>CD-ROM drive or network access (for installation)</i>

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

Requirement

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

Note: If you are planning to install *i2 iBase GIS Interfaces 2*, you should check the system requirements for any GIS applications you use as these may exceed the above recommendations.

For large databases the performance will depend on the amount of memory on each client using the database and not just on the file server hosting the database file.

When considering hardware requirements, the underlying operating system should also be taken into account. For example, Windows XP and Vista consume more resources for the core operating system than Windows 2000, so it might be necessary to increase the amount of recommended RAM for this platform.

Operating systems

These are the supported operating systems for *iBase*:

Operating System

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

Note: Wireless networking and Wide Area Networks (WANs) are not suitable for use with *iBase* because all client machines require a continuous network connection to the *iBase* database.

iBase is supported on the Western Europe & USA, Central Europe, Cyrillic and Turkic regional versions of the supported operating systems.

The initial release will only 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. Support on Western Europe, Central Europe, Cyrillic, and Turkic regional versions of Windows Vista will be available when we release a fully supported version of our products on Vista. *iBase* is User Access Control (UAC) compliant.

If *iBase Database Replication* is installed, support is restricted to the English versions only.

Third party software

iBase 5 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.

iBase needs the Microsoft MDAC libraries version 2.6 (or later). On Windows 2000 systems, an appropriate version of the MDAC libraries must be installed before installing *iBase*. MDAC 2.8 SP1 is included on the CD in the folder `Pre-requisites\MDAC`. Alternatively, you can download the latest version, or a different language version, from <http://www.microsoft.com/download>.

iBase 5 can import from a number of databases including Microsoft Access 97, Access 2000 and SQL Server using OLE DB. The availability of other databases depends on the OLE DB providers loaded on the PC.

The printed documentation provided with *iBase* is 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.

Additional requirements for use with SQL Server

If you intend to install SQL Server 2005 Client Components then you must also install MDAC 2.8 SP1, which is included on the CD in the folder `Pre-requisites\MDAC`.

Notes: If you are planning to use SQL Server 2005 then any client machines, where SQL 2000 client components have previously been installed, will require Microsoft SQL 2005 Backward Compatibility Components.

You may want to install the SQL Server Client Network Utility on any client that is to be used to configure the connection to the server, either using *iBase Designer* or the *iBase* Database Configuration utility. This allows the *iBase* configuration tools to find and list available servers.

SQL Server database servers

The overall success of *iBase* is dependent on using a suitable server machine to run the SQL Server instance. The volume of data, the number of clients and the type of analysis work will combine to determine the specification of the server machine. Suitable machines are specialist high performance server machines with high performance disk subsystems and large amounts of physical memory.

Operating system

The supported operating systems for server side *iBase* are:

- Windows 2000 Server/Advanced Server SP4
- Windows Server 2003 and Windows Server 2003 R2 Standard/Enterprise x86 SP1

Note: Wireless networking and Wide Area Networks (WANs) are not suitable for use with *iBase* because all client machines require a continuous network connection to the *iBase* database.

SQL Server versions

The supported SQL Server versions for server side *iBase* are:

- SQL Server 2005 Standard Edition, SP2
- SQL Server 2005 Enterprise Edition, SP2
- SQL Server 2000 Standard Edition, SP4

- SQL Server 2000 Enterprise Edition, SP4
- SQL Server 2000 Personal Edition, SP4

Note: SQL Server 2000 is not supported on clients with Windows Vista.

If you want to use Full-Text Search, you must install the Full Text Search components from the SQL Server installation CD.

Note: You may experience a 45-second delay when you run a Full-Text Query in an instance of SQL Server 2005 that is running on a server without Internet access. For details, see: <http://support.microsoft.com/?kbid=915850>.

iBase does not support case-sensitive server settings.

The SQL Server language version must match the operating system regional setting if it is available, or be English if not available. The default SQL Server collation sequence for the operating system must be used.

Additional requirements for database servers

To allow Full-Text Search indexes to be built for PDF documents, you need to install the Adobe PDF iFilter on your server. This is provided as part of Adobe Reader version 8 and will be installed when you install this product.

Using firewalls on a server machine

If you want to access an *iBase* database on a remote machine, any firewall on the remote machine must be configured to allow SQL Server access. This particularly affects Windows XP SP2 where the Windows Firewall is enabled by default. For further details please refer to the following Microsoft Knowledge Base article:

Article ID 841249: *How to configure Windows XP Service Pack 2 (SP2) for use with SQL Server*

You can also find additional information if required from SQL Server Books Online: *How to: Configure a Firewall for SQL Server Access*, or from this Knowledge Base article:

Article ID 823938: *How to configure an instance of SQL Server to listen on a specific TCP port or a dynamic port*

Secure Socket Layer (SSL) Encryption

Microsoft SQL Server uses Net-Libraries for the communications between clients and server, one of which handles Secure Socket Layer (SSL) encryption. The security of data exchanged between SQL Server-based *iBase* clients and the server can be increased by enabling SSL encryption. Enabling SSL will increase the work performed by the SQL Net-Libraries resulting in slightly slower performance of the *iBase* applications.

iBase Database Replication

iBase Database Replication is only supported with servers on Windows Server 2003, and Enterprise editions of SQL Server 2000 or 2005.

Notes: The Publishers and Subscribers in a replicated *iBase* system must all use either SQL Server 2000 or SQL Server 2005—you cannot use a combination of SQL Server versions in the same replicated *iBase* system.

Windows Terminal Services, optionally with Citrix Presentation Server v4, is needed if you want to administer all replicated databases from the publisher site. It also provides users with network access to alternative replicated databases in the event of local server failure.

Authorization Information

i2 products are licensed products and require a dongle containing a valid permit in order to run.

iBase can be licensed using local or network dongles. It is recommended that the *iBase Designer* permit be used from a local dongle for data security reasons.

For maximum security the Extended Access Control option for *iBase Designer* can be supplied on a Hardlock local dongle if required. This helps to maintain physical security. See the *Administration Center* document, *Managing Access Control*, for a fuller discussion of the issues surrounding the security of access control.

Note: Outside of the Americas, contact your supplier for details of the Extended Access Control option.

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.

Notes for existing users

iBase 5 uses the same dongle permits as *iBase 4*. Therefore existing users do not require a replacement dongle.

NetHASP authorization

You will need to know which copy of the NetHASP configuration file (*Nethasp.ini*) you are currently using for your i2 product(s). You may have one for each i2 product, located next to its executable, or you may be using a global copy, located in the `WINDOWS` or `WINDOWS\System32` folder.

It is recommended that you use a global NetHASP configuration file for all of your *iBase* applications. To use your existing license settings, you should move your original *Nethasp.ini* to your Windows system folder (e.g. `C:\WINDOWS\System32`) and delete any other copies. (These are typically located next to i2 application executables.) You may wish to keep a backup copy elsewhere on your system. See the *NetHASP License Manager Guide* for more details.

Documentation and Examples

The manuals and online help for *iBase* are updated for this release. With the exception of the *Administration Center*, the manuals and help are automatically installed with the product. Shortcuts for the documentation are provided on the Windows Start menu under the **i2 ► i2 iBase 5 ► Documentation** program group.

Administration Center

Information specifically for administrators of *iBase* is provided in the *Administration Center*. This online documentation can be installed by selecting the Custom installation option; installation is optional. An **Administration Center** shortcut will be added to the Start menu under the **i2 ► i2 iBase 5 ► Documentation** program group. The *Administration Center* can also be run from the CD. To run it, double-click on `AdministrationCenter.chm` in the `Administration Center` folder.

Note: The *Administration Center* must be run on a local drive—you cannot view its contents over the network.

Manuals

There is a new *i2 iBase 5 Designer Guide* for this release. The other manuals in the documentation set are also updated. All manuals are supplied in PDF format:

Manual Title	Part Number
<i>i2 iBase 5 Quick Start Guide</i>	1252
<i>i2 iBase 5 User Guide</i>	1255
<i>i2 iBase 5 Importing Guide</i>	1256
<i>i2 iBase 5 Reporting Guide</i>	1257
<i>i2 iBase 5 Designer Guide</i>	1258

i2 user documentation is example based and is designed to help users learn how to use the software. You should install the User Guide database with the software so that users can work through the examples. The example data 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.

The *i2 Products Packaging and Deployment Guide* is supplied on the CD in PDF format. The guide location is:

CD:\i2 iBase 5\Deployment\Documentation

Online help

Online help is available from within *iBase* that provides reference information for users of the product's functionality.

Note: Reference information for administrators is also provided by the *Administration Center*, and for database designers by the *i2 iBase 5 Designer Guide*.

White papers

The following white papers are available. Those available on the CD are in the `White Papers` folder. The others are available from your supplier.

White Paper Title	Part Number	On the CD?
<i>i2 iBase 5 Product Overview</i>	1303	
<i>What's New in i2 iBase 5</i>	1406	
<i>Upgrading to i2 iBase 5 and i2 Analyst's Workstation 3</i>	1405	Yes
<i>Using i2 iBase 5 with i2 TextChart3</i>	1304	
<i>i2 iBase 5 Database Replication Product Overview White Paper</i>	1389	
<i>i2 iBase 5 Database Replication Deployment Guide White Paper</i>	1396	
<i>Using i2 iBase 5 in a Distributed Environment White Paper</i>	1390	

Examples

An example database called `Designer Guide` is installed with the product for use with the *i2 iBase 5 Designer Guide*; instructions for setting up the database are given in the manual.

An example database called `User Guide` is installed with the product for use with manuals such as the *i2 iBase 5 User Guide*. To use this:

1. Select the following from the Windows Start menu:
All Programs ► i2 ► i2 iBase 5 ► Documentation ► i2 iBase 5 User Guide Database.

The first time you use it, the `Examples` folder is copied to your application data area and a shortcut is placed in the `My Documents` folder (on Windows XP) or in the `User's Files\Documents` folder (on Windows Vista). The database, `User Guide.idb`, is opened from an `i2\i2 iBase 5\Examples` subfolder.

2. Log on to the security file `User Guide.ids`. These are the standard user IDs:

User ID	Password	Role
general	general	A user with all the permissions required to work through the <i>i2 iBase 5 User Guide</i> , the <i>i2 iBase 5 Reporting Guide</i> , and the <i>i2 iBase 5 Importing Guide</i> .
SYSADMIN	SYSADMIN	A full system administrator with all the permissions required to work through the <i>i2 iBase 5 Designer Guide</i> .
DataEntry	DataEntry	A Data Entry User with restricted menu functionality and access to fewer links.
Analyst	Analyst	An analytical user with read-only access.

Moving the User Guide database

If you move the `User Guide` database from its default location, you will need to open it in *iBase Designer* to re-register the location of the security file which controls it. This is standard *iBase* behavior.

Reverting to a clean version of the User Guide database

If you are using a Microsoft Access database and you want to revert to the version of the User Guide database shipped with the product:

1. Select the following from the Windows Start menu:
All Programs ► i2 ► i2 iBase 5 ► Tools ► Reset i2 iBase 5 User Guide Database.
2. Click **Yes** when prompted to reset the database.

Warning: Reverting to an unmodified User Guide database will mean that you will lose any changes that you made. For example, you will delete all entities, links, sets, queries, and other folder objects that you created or modified. This command does not remove SQL Server databases.

Using the User Guide database with SQL Server

The User Guide database is shipped as a Microsoft Access database and can be used with *iBase*. However, if you want to follow the examples in the *i2 iBase 5 User Guide* that demonstrate how to use Full-Text Searches, queries with distinct counts, cases and queries with semantic conditions, then you will need to upsize this to SQL Server format and build a Full-Text search index for all fields of all entity and link types. Each user will need their own copy of the database.

The following instructions assume that you have a working installation of *iBase* prior to installing the example databases, and that you have permission to create a database on your SQL Server machine. See the *Administration Center* for information on how to do this and for further details about the steps described below.

To upsize the User Guide database:

1. Check that the server does not have an existing database called `User Guide`. If it does, rename the `User Guide.idb` file, for example to `User Guide 2.idb`. You will also need to rename the other files associated with the database (with the suffixes `.dot`, `.doc`, `.ant` and `.idx`).
2. Copy the `User Guide Database` folder to a suitable place. It is located in:

```
C:\Program Files\i2 iBase 5\Resources\User Guide Database
```
3. Start *iBase Designer*, and then log on to the security file `User Guide.ids` as user `SYSADMIN` and cancel the option to open a database or create a new one.
4. From the **Tools** menu, select **Upsize ► Database to SQL Server**.
5. Accept the option to make a backup.
6. Enter the name of the SQL Server machine and a login and password that has the `dbcreator` role on the server. Do not use the server name (`local`) since other clients will not be able to use the database. This server name is intended only for local use on the server computer. If the database name does not appear when you refresh the list, type in the machine name of the server.
7. Click **Finish**. The database will be copied to the server using the name of the `.idb` file and the `.idb` file will become a connection file for the database.
8. In *iBase Designer*, use the option **Full-Text Search Indexing** on the **Tools** menu to build a full index for all fields of all entities and links. For further information, refer to the *Administration Center* or the online help.

You can now use the database by starting *iBase*, and from the **File** menu, selecting **Open Database**. For information on using the User Guide database with *Data Miner*, see the *Administration Center* document *Setting up Data Miner*.

Utilities

The following utilities are available with *iBase 5*. The utilities are accessible from the Windows Start menu in the **i2 ► i2 iBase 5 ► Tools** program group.

i2 iBase 5 Database Configuration (SQL Server databases only)

You can use the Database Configuration utility to manage connections to SQL Server databases, specifically to set the server name, server login name and the use of Windows security. You can only use the utility with databases upgraded to or created for *iBase 5*.

Note: To manage the connection to an SQL Server database created for *iBase 4*, you must use the SQLDBConfig utility supplied with *iBase 4* or *Analyst's Workstation 2*.

i2 iBase 5 Repair Compact

You can use the Repair Compact utility to repair a damaged *iBase 5* Access database. This utility can also be run from the **Tools** menu in *iBase Designer*.

i2 iBase 5 Scheduler Configuration

The Scheduler Configuration dialog allows administrators to set up *Scheduler* for running batch imports and exports.

i2 iBase 5 Audit Viewer

You can use Audit Viewer to view and manage audit logs for database and security files.

Installation

Before installing *iBase 5*, please check that your system meets all the requirements described in *System Requirements* on page 4.

Compatibility notes

iBase 5 can be installed in parallel to *iBase 4* so that both versions can run on the same machine. However, *iBase 5* databases are not compatible with *iBase 4*—any existing *iBase 4* databases and security files that you want to use with this release must be upgraded. See page 12 for details.

iBase 5 is compatible with the following i2 applications:

Analyst's Notebook

iBase 5 is compatible with *Analyst's Notebook 7*.

Note: You can open charts created with *iBase 4* and *Analyst's Notebook 6*. When you open the chart, any *iBase 4* chart items are automatically converted to *iBase 5*. The database does not have to be open.

iBase GIS Interfaces

iBase 5 is compatible with *iBase GIS Interfaces 2*.

TextChart

iBase 5 is compatible with *TextChart* 3.

- *iBase* 5 will load visualizations and validate templates from earlier versions of *TextChart* (v1.0.5, 1.1.55 and 2.0.1).
- *iBase* 5 will only create templates for use with *TextChart* 3. These templates are not compatible with previous versions of *TextChart*.

TextChart and *iBase* must be installed on the same machine if you want to use live connections to *iBase* databases. *TextChart* does not need to be installed on the same machine as *iBase* if you load data from visualizations (as in previous releases).

iBase Database Replication

iBase Database Replication requires that you choose the SQL Server Enabled feature in the installer. Non-replicated databases can use a replicated security file, provided the databases are *iBase* 5 databases.

iBase Database Replication has no effect on how you use Extended Access Control with *iBase*. However, it is essential to replicate the security file if you use Extended Access Control within a replicated environment. Failure to do so will undermine the additional security provided by Extended Access Control.

If you use *iBase GIS Interfaces* then each site that uses a mapping application must install *iBase GIS Interfaces* and set up its own mapping configurations. Mapping configurations are not replicated.

iBase Database Replication may not be used with *iBase Scheduler* or *Analyst's Workstation*.

Microsoft Office Products

iBase interoperates with applications in the following versions of Microsoft Office:

- Office 2003 (all editions)
- Office 2007 (all editions)

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

- Office 2000 (all editions)
- Office XP (all editions)
- Office 2003 (all editions)
- Office 2007 (all editions)

Upgrade notes

To use an existing 4.0 or 4.1 security file and database with *iBase* 5, you will need to upgrade them. You are prompted to do this when you first open the security file or database in *iBase 5 Designer*. Once you have upgraded them, you cannot then log on to the security file or open the upgraded database using an earlier version of *iBase*. You upgrade *iBase* 4 templates by viewing them in the Template Manager.

You should always back up your *iBase* system before upgrading to *iBase* 5.

Note: This is particularly necessary if your system includes a version 4.1 security file in SQL Server format. When upgrading this type of file, *iBase Designer* will not make an automatic backup of the SQL Server database component.

You will need to update the command groups in your upgraded security file. To do this,

start *iBase Designer*, log on to the security file, and select **Update Command Groups** from the **Tools** menu. Repeat this for each upgraded security file.

Before uninstalling iBase 4

If you use SQL Server databases, you may want to keep a copy of *iBase 4* on one of your machines for managing connections to SQL Server databases that have not yet been upgraded to *iBase 5*.

To change the connection details of an *iBase 4* database, for example after moving it to a new server, you must use the SQLDBConfig utility supplied with *iBase 4* or *Analyst's Workstation 2*.

Upgrading the Scheduler database

You can use an *iBase 4 Scheduler* database with *iBase 5*. Once you have installed *iBase 5*, start the Scheduler Configuration dialog or the Scheduler service. These will automatically update the `Scheduler.mdb` file to the latest version.

Upgrading a replicated security file

Contact i2 for advice on how to upgrade a replicated security file.

Windows Terminal Services

If you are installing on Windows Terminal Services, you must install using the Add or Remove Programs facility of the Control Panel. To complete the installation *iBase* 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.

Installation steps

Please read the *i2 iBase GIS Interfaces 2 Release Notes* before installing *iBase* as it is important to install i2 and third-party applications in the correct order.

Using Setup.exe

To install *iBase 5*:

1. Log on to the machine on which you are installing as a local administrator.
2. Close all applications that you may have open.
3. If present remove any USB Authorization Device (Dongle).
4. Insert the product CD into the computer's CD drive.

The installation will start automatically. If it does not start automatically, you need to browse to the CD and run `Setup.exe` in the `i2 iBase 5` folder.

5. Follow the prompts. You will be asked for the setup type:

Basic user	Allows the user to work with MS Access databases only. Select Custom to install <i>iBase Designer</i> .
Standard user	Allows the user to work with either MS Access or SQL Server databases. Select Custom to install <i>iBase Designer</i> .
Custom	<p>Allows you to install the optional parts of <i>iBase</i>, such as <i>iBase Designer</i>, <i>iBase GIS Interfaces</i>, any of the tools or utilities, and/or the <i>Administration Center</i>.</p> <p>Notes: For blue 8 world, you must install the interfaces while logged on as the user who will run the interface—this user needs to be a local administrator.</p> <p>We recommend that you install the <i>Administration Center</i> on machines used by system and database administrators as you may need to refer to it in order to set up and configure your installation.</p>

6. Follow the prompts to complete the installation.

The installer will install these shortcut folders:

i2 ► i2 iBase 5 ►	Start <i>iBase</i> .
i2 ► i2 iBase 5 ► Documentation	Access the <i>Administration Center</i> (if installed), example databases and product documentation in PDF format.
i2 ► i2 iBase 5 ► Tools	Starts <i>iBase Designer</i> and <i>iBase</i> utilities, such as Scheduler and Audit Viewer.

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
```

For more details refer to the *i2 Products Packaging and Deployment Guide*.

Using Windows Installer (MSI)

This version of *iBase* 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

Installing *iBase* installs 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*.

Microsoft .NET Framework language packs

In order to have Microsoft .NET Framework information dialogs displayed in a local language you need to install a corresponding language pack. You can download Microsoft .NET Framework version 2 language packs from the Microsoft Web site:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=39c8b63b-f64b-4b68-a774-b64ed0c32ae7&DisplayLang=en>.

Language specific files

The user locale setting controls the installation of language specific files and folders. For more details, refer to the *i2 Products Packaging and Deployment Guide*.

Customizing installed files

For information on customizing installed files, please refer to the *i2 Products Packaging and Deployment Guide*.

Configuring an installation of iBase 5

Information on setting up your installation is available in the *Administration Center*.

Setting up client machines on Windows Vista

Any user who sets up *iBase* on client machines running Windows Vista will require modify permissions on the file `i2\i2 iBase 5\<language>\Settings\settings.xml`. This permission is required even if the user is a member of the Administrator group.

iBase Scheduler

Before attempting to configure *Scheduler*, we recommend that you read the *Administration Center* document *Setting Up iBase Scheduler* which provides guidance on setting up this utility.

If you have installed *Scheduler* in a thin-client environment, you may want to set a password to control access to the iBase Scheduler Configuration dialog. To do this, display the iBase Scheduler Configuration dialog (see the list of shortcuts above) and then click the **Service** tab to display the Service page where you can enter a password.

If the *Scheduler* database, `Scheduler.mdb`, is installed on a remote machine then the domain account used by the Scheduler service must be given suitable permissions. For details of these permissions, see the *Administration Center* document, *Setting Up iBase Scheduler*.

Adobe PDF iFilter (SQL Server databases only)

To allow Full-Text Search indexes to be built for PDF documents, you need to install the Adobe PDF iFilter on your server. This is provided as part of Adobe Reader version 8 and will be installed when you install this product. After installing Adobe Reader 8:

1. On SQL Server 2005 only, execute the following two statements:

```
EXEC sp_fulltext_service 'verify_signature', 0
EXEC sp_fulltext_service 'load_os_resources', 1
```

2. Stop and then restart the SQL Server and MS Search Service clients.
3. In *iBase Designer*, re-index your database(s) in the usual way.

iBase Database Replication

Detailed information on configuring Microsoft SQL Server Merge Replication for new and existing *iBase* systems is given in the *Administration Center* document *Setting Up iBase Database Replication*. This information is intended for both *iBase* and SQL Server administrators. It covers setup and maintenance in both *iBase* and SQL Server Enterprise Manager or SQL Server Management Studio.

Contact i2 for advice on how to upgrade a replicated security file.

Modification and uninstallation

To modify the installation of *iBase*, open Add/Remove Programs from the Windows Control Panel, select **i2 iBase 5** and click **Change**. This displays the InstallShield Wizard. Select the **Modify** option to add or remove features from the installation. (Selecting the **Remove** option will uninstall the whole product.)

Before removing any programs, back up any configuration files that you have amended, such as icon lists, Word Search exclusion files, Full-Text Search exclusion files and mapping application configuration files. The uninstallation will remove files installed by the original install process but it will not remove any files added or updated since the installation.

To uninstall the whole product, open Add/Remove Programs from the Windows Control Panel, select **i2 iBase 5** and click **Remove**. This will uninstall *iBase* and all the custom options selected as part of the installation.

Uninstalling iBase Scheduler

Uninstalling *Scheduler* will not remove the Scheduler database. The database contains details of database connections, tasks and triggers and can be used with a new installation.

Enhancements and Bug Fixes

This section contains information on enhancements and bug fixes in *iBase* version 5.

Enhancements in this release

The following enhancements were made in this version of *iBase*.

Analyst's Notebook

iBase items that are merged in *Analyst's Notebook*, can be merged in *iBase* once you are sure that two or more records represent the same real-world object. Analysts with suitable permission can use semantic Smart Matching in *Analyst's Notebook*, visualize and merge the results in the chart and, when confident with the outcome, merge the corresponding items in the *iBase* database.

Batch Delete

The way in which Batch Delete works is now more efficient. For details, see the *Administration Center* or the *iBase* online help.

Browsing and Listing Records

When semantic types are assigned to icons, entity records listed in the Browse and Records dialogs can be sorted by semantic type.

Cases

- You can now partition your data by case. This requires the database to be converted to case-control.
- There is a **Change Case** command on the **File** menu to allow users to select a different case without first having to close and reopen the database
- The Security Design report is extended to include optional information on who can access the cases in the database.

Coordinate Extensions

A new Coordinate field type allows you to enter locations using multiple coordinate systems For details of the new field type, see the *i2 iBase 5 Designer Guide*. The field type supports the following coordinate systems:

- Military Grid Reference System
- British National Grid
- Decimal Degrees
- Decimal Minutes
- Degrees Minutes Seconds
- Universal Transverse Mercator
- Universal Polar Stereographic

The Coordinate Query Builder dialog makes use of this field type. Users can:

- Specify two coordinates, and find the specified entity types that fall within the box defined by the two coordinates.
- Specify a single coordinate and find specified entity types within a user defined tolerance from that point (this defines a box, not a GIS type buffer zone).

iBase GIS Interfaces does not need to be installed to use this feature but you will need an additional license to use these extra facilities.

Databases

- Databases can be partitioned into separate cases. Access to records is controlled on a case-by-case basis. You can perform analysis on a single case using read/write access, or across multiple cases using read-only multi-case analysis mode.
- In the Database Properties and Create New Database dialogs, the **SCC Control** option is now renamed **Standard (SCC) Control**, and the **Restrict SCC Lists to Accessible Items Only** option only appears if there is an EAC permit. There is no change to the underlying function.
- Connection files and security connection files now contain just enough information to allow connection to the SQL Server database; the configuration settings are now stored in the SQL Server database.
- Database templates can be stored in one of two locations, one for user and one for workgroup templates.

Duplicate Records Checker

The performance of the Duplicate Records Checker is improved for SQL Server databases.

Entities and Links

- The way in which you set the direction and strength of a link now requires fewer mouse clicks.
- The lock that was previously placed on an edited record, and only released on a change of date, is now removed. This means that once a user has saved a record, another user can modify it immediately rather than wait until the following day.

Folder objects

- Each user can have their own personal category in which their folder objects are saved. You can specify a user's personal category in the User dialog which is opened from the Security Manager.
- A **Save As** button has been added to all folder object dialogs.
- A description can now be added to a folder object when adding and editing queries, sets, report definitions, browse definitions and so on by clicking the blue information button in the lower left of the dialog. This will be displayed in a tooltip when the pointer hovers over that folder object in a list.
- You can simplify the administration of several common databases, whether copies of a central database held on remote machines or replicated databases, by defining a core set of folder objects (*common folder objects*). Any authorized user can define folder objects as common items but only an administrator with either a Schema Update license or an iBase Database Replication license can make use of them.

Full-Text Search (iBase Standard/Premium only)

- You can search for people's names and return results using the name variant catalog provided by power2, to find all the different spellings and variations of a name, for example Jon, John, and Jonathan. The catalog is automatically installed as part of the i2 Semantic Type Library, and is automatically imported into the database when you first build the Full-Text Search index.
- You can perform Full-Text Searches on specified fields. Users can save the field selections for use with other Full-Text searches.

iBase Database Replication

Updates to the schema of a replicated database now include datasheets and folder objects defined as *common folder objects*.

iBase Designer

- The Update Database Schema dialog enables database schema changes to be propagated to remote *iBase* installations by applying a database template. This new option makes it easier to update the schema of a production database or databases that are copies of a central database (and held, for example, on laptops). Schema changes can include updates to datasheets and folder objects (defined as *common folder objects*). This feature is separately licensed.
- The Performance Tuning wizard enables you to improve the performance of queries in SQL Server databases. Running the Performance Tuning wizard will upgrade the indexes of an *iBase* SQL Server database to use indexes that are optimized for querying. New databases created in *iBase 5 Designer* always use query-optimized indexing.
- A Description field has been added to the Entity and Link dialogs. This can be used to add notes on the purpose/use of the entity or link type. Any text entered here is displayed as a tooltip in *iBase*.
- Pick lists can be filtered, or restricted, so that the item selected in one list controls the

content of subsequent lists. This enhancement makes it faster and easier to enter data as the content of one list, (such as car models) can be filtered by the choice made in the previous list (such as car makes).

- Each item in a pick list can now contain a description.
- You can now sort the items in a pick list by clicking a **Sort 'A to Z'** button.

Icons

- The shading color of an icon assigned to a particular record can be changed in the Assign Icons dialog to allow visualizations to be clearer and more relevant. Access to the Assign Icons dialog can be denied to users through the new Assign Icons system commands access control group.
- Additional icons are available in the military and combined icon lists, many with an enhanced appearance. Some of the new icons are particularly suited to military applications.
- You can now make use of *Analyst's Notebook* custom icons.
- The semantic type of an icon can be used in the Browse and Records dialogs to sort entity records by semantic type.

Importing and exporting

- Bulk import is a new import mode that enables large imports to be completed much more quickly than previously. Bulk importing is particularly suited to operations such as overnight updating of large databases using *iBase Scheduler*, when there are no users accessing the database. This option is only available with Microsoft SQL Server 2005, and needs to be set up on the SQL Server machine. See the *Administration Center* for detailed information on configuring databases and servers for bulk import.
- You can now import data from Microsoft Excel 2007 (using source files saved as XML with the extension `.xlsx`). If you do not have Office 2007 installed then you will need to download the "2007 Office System Driver: Data Connectivity Components" from the Microsoft Web site:
<http://www.microsoft.com/downloads/details.aspx?FamilyID=7554F536-8C28-4598-9B72-EF94E038C891&displaylang=en>
- Import sets can now include records that were not imported because they were a perfect match with records in the database. To use this option, turn on the **Include records found but not updated** check box on the last page of the import specification.

Installation and configuration

The settings in the Options dialog are now saved to a `Settings.xml` file. See the *Administration Center* for details.

power2

- You can now use semantic types in queries (see *Queries and Scored Matching* below).
- When semantic types are assigned to icons, entity records listed in the Browse and Records dialogs can be sorted by semantic type.
- The tooltips that are displayed for labels now show the semantic type (in addition to indicating whether the field is a discriminator or mandatory field).

Queries

- You can use semantic types and semantic properties in queries to search a number of different but related entity types and fields. For example, “Person” as shorthand for all entity types that are assigned the Person semantic type such as Policeman, Fire crew, Victim, Nominal, Suspect or Witness. Semantic queries can be chained with traditional *iBase* queries.
- You can exclude specific records from the results of a query. Using the Source Records dialog, you can exclude a single record, the results of another query, or a set.

Reports

- The performance of reporting when using Microsoft Word format is now improved.
- Access reports with complex relationships no longer have to be re-created each time you run a report. Now, when reporting to Microsoft Access format, users can choose to refresh the data in the mdb file with the report data, extend the mdb file to include the report data, or to overwrite the mdb file. Previously, users could only overwrite the mdb file. These new features allow users to build reports where information in three separate entity types (all linked by one or more link types) can be reported on a single line.

Security and the Security Manager

- You can now define a default folder as part of the details of the user account, to be used instead of General
- Before producing a Security Design report, you can now choose to include or exclude user information.

TextChart

- You can now start *TextChart* from within *iBase*, and open a new workspace suitable for use with a different *iBase* database. You will be prompted to select the database, and enter the login name and password. To use this facility, select the **New workspace aligned to a different iBase database** option in the Select i2 TextChart Workspace dialog.
- When a template is generated, the default for Yes/No fields is automatically set to No (unless a different default is set in the database schema).
- *TextChart 3* generates templates for *TextChart 3* only; the option to select an earlier template version is therefore removed.

Bugs fixed in this release

The following faults were fixed in this version of *iBase*.

Analyst’s Notebook

Adding a corner to a link when there were multiple links between two entities no longer causes the links to be merged.

Browsing and listing records

It is now possible for two or more users to autorun the same browse definition.

Databases

- Previously when a calculated date part field was sorted, Sunday always appeared first in the list (followed by Monday, Tuesday, and so on) regardless of your locale and the First Day of the Week setting for the database. This is now fixed.

- When changing the icon list path in *iBase*, the Options dialog now filters for *.txt and not for iconlist.txt.
- It is now possible to create an SQL Server database when the SQL Server model database has been changed from its default size.

Datasheets

- Previously if you included an asterisk in the name of a field it could not then be used in datasheets. This is now fixed.
- It is now possible to use the **Copy** button to copy a link without creating a duplicate record. Copying a link will now display the Matching Records dialog. If the user clicks **Ignore** in this dialog, another duplicate check is performed when the user saves the record.
- Previously a linked record was not created if the linked record contained just an embedded graphic or document that was inserted by clicking the **Browse (...)** button (instead of by using the shortcut menu).

Entities and links

- Previously when a user saved a folder object, other users were prevented from modifying that object for a period of 24 hours. This restriction no longer applies. Users who want to prevent editing by other users should now save their folder objects with Private access.
- To use Batch Edit, a user must now have permission to Update/Delete Entity/Link records created by others.
- You can now purge soft deleted records on Jet databases.

iBase Designer

- You can now use standard fields with names containing parts of reserved words such as Record Status A, Confidence A, Direction A, Record Type, SCC A and so on.
- When you rename an item on a pick list using the **Rename Item** command, you update existing records with that change but when you rename the item in the Pick List dialog, you do not. This behavior has now changed so that you are warned of the effect of using the **Rename Item** command on existing records. See the *iBase Designer* online help for detailed information on pick lists.
- It is now possible to connect to an SQL Server database, set to use Windows authentication, using a different user account to the local Windows user account. Previously, this would prevent you from logging on in *Designer*.
- You can now create another SQL Server 2000 database without having to close the first one.

Importing and exporting

- Fields starting with # can now be exported.
- It was previously possible to accidentally overwrite an existing file when exporting data from *iBase*. You are now asked whether you want to overwrite the file. Answering No will cancel the export operation.
- It is no longer possible to import data containing record IDs with trailing spaces appended.
- It is now possible to export records with pictures to an XML file and then import them successfully.
- When exporting to Excel, an out of memory error will no longer occur when exporting data that begins with =, -, + and @.

Installation and configuration

The *Administration Center* can now be installed at any time. Previously, it could only be installed when the product was installed.

Queries and Scored Matching

Brackets are now evaluated correctly in a query where count = 0 and conditions are set.

Reports

The table widths set in a report template can now be fixed or sized to the content. Users can switch between this setting using the new **Auto-size List tables** check box in the Report Definition dialog.

Security and the Security Manager

- When the Logon dialog is displayed with the user name already entered, the focus is now on the **Password** box .
- In the Logon dialog, it is no longer possible to copy and paste in either the **User name** or **Password** boxes.
- Previously the use of Security Classification Codes could prevent a datasheet from displaying all the records that were accessible to the user. This problem is now fixed.

TextChart

- When the *TextChart* template is generated, any default value for the field mapped to the Source Reference, Source Type and Time Zone properties (in the charting scheme) is ignored because the *TextChart* user will manage these values.
- When generating a template, the attribute class property for real number fields is no longer set to two decimal places regardless of the number of decimal places in *iBase*.

Valid End Types

If all end types are valid on end 1, and only one end type is valid on end 2, the Valid End Types dialog would report exceptions even though the link ends were valid. This problem is now fixed.

Known Limitations

This section describes the limitations for *iBase* 5.

Audit Viewer

- You cannot open the System Information dialog in the Audit Log Viewer on a client PC connected to a Windows 2003 Terminal Server. A prompt displays 'System Information Is Unavailable At This Time'.
- With Microsoft Access databases using audit level 4, the audit log no longer logs the specific records worked on as part of a bulk operation (such as batch edit, batch delete), only that the process has started and finished.
- When using bulk import (SQL Server databases only), audit level 4 or 5 will not log the creation or update of individual records; only the start and end of the import operation is logged.
- You cannot use the # symbol as a wildcard character in the searchable fields of the audit log.

- The following limitations apply when *iBase Database Replication* is used:
 - Archive files are not replicated. To distribute the archive files to other sites, load them into the database using the File Manager.
 - Conflicting changes to existing users or groups, for example concerning the permissions set for a group, are detected and automatically resolved by the Security Manager—the first site to make the changes wins the conflict. This type of conflict is not recorded in the security audit log. The security audit log only records conflicts between user and group names.
 - Conflict Resolved records in the Audit Log may have an earlier time than the corresponding Conflict Detected record if the application servers are set to different times. Notice that all servers which are to be configured for merge replication must be set to the same time.

Cases

- All the data in a database must belong to a case. It is not possible for data to be shared between different cases. For this reason, the case field is always a mandatory field.
- When you convert a database to case control, existing data is added to a single case. If you want to assign the data to several cases, you will need to export it, delete unwanted records from the case, and then import the data into the required cases.
- When you delete a case, the audit log will not contain a log of the records deleted as a result of deleting the case.
- You cannot use Word Search in a case-controlled database.
- You cannot use security classification codes in a case-controlled database.
- You cannot use cases in a replicated database.

Charting to Analyst's Notebook

- *Analyst's Notebook* requires the presence of OLE server applications on the computer when displaying OLE objects on a chart. For example, *Analyst's Notebook* displays pictures (JPGs or BMPs) using whichever application is registered as an OLE server for picture files on the computer. For further details, including workarounds, see the *i2 Analyst's Notebook 7 Release Notes*.
- Charting from multiple databases with the same name can produce unexpected results:
 - When the databases have the same structures but different data, incorrect information will be retrieved for records charted from a database that is not currently open. Alternatively, the user may be informed that the record has been deleted from the database.
 - When the databases have different structures and data, the user will see a permissions error message if an entity or link type with the same three-letter identifier does not exist in the open database. If the three-letter identifier does exist then a record for the incorrect entity or link type may be displayed or, if there is no record with that record number, the user may be informed that the record has been deleted.
 - **Find Path** will retrieve a path from the connected database. This database may not be the database from which the entities were charted.
 - **Merge in iBase** will merge the entities in the connected database. These may not be the same entities that are displayed on the chart.

- Deleting an entity or link using the Show dialog will delete that record from the currently open database, which may not be the same database from which it was charted.

For these reasons, we recommend that all databases have a unique name.

Note: You may also experience similarly unexpected results when plotting data to maps from multiple databases with the same names; see the release notes for *iBase GIS Interfaces* for details.

- Changing the name of a database using *iBase Designer* does not update the name of the database as displayed in *Analyst's Notebook* by right-clicking on an entity.
- Items are no longer recharted after editing if they are merged with other database entities. This means that the label may now become out-of-date following editing of the item.
- Errors occur in *Analyst's Notebook* if you create a labeling scheme in which nothing is set and then add it to a charting scheme in which nothing is set (apart from the labeling scheme).
- When charting single/directed links in Association style, the displayed grades, dates/times and source references are taken from an arbitrary constituent link.
- If you have defined fields on links as chart attributes, these are not displayed if you chart multiple links with the Single or Directed options selected.
- On machines where Microsoft Office 2003 is installed, pictures (.bmp files) displayed in *iBase* link charts or on *Analyst's Notebook* charts may be compressed such that they are unrecognizable, and a title line may be added under the picture. If the problem occurs, contact i2 Technical Support for help.
- Opening *Analyst's Notebook* from *iBase* and selecting from the *Analyst's Notebook* menu bar before the database open message is displayed locks up the system. The message cannot be accessed to acknowledge it.
- It is not possible to run the Timeline Assistant on the results of a query if the query uses the Any Entity Type in its definition.
- Users who only have permission to Add/Update/Delete records in *iBase* cannot merge records using the **Merge in iBase** command. They require permission to modify/delete records created by other users.
- Windows XP only, with the standard Windows XP theme: some *iBase* dialogs continue to use the Windows Classic theme.

Conflict Viewer (Database Replication only)

Merge conflicts and a specific type of link end conflict are not supported in the Conflict Viewer:

- Conflicts arising from merging entities are not supported, and cannot be viewed in the Conflict Viewer. You need to set up a procedure to prevent these conflicts from arising. See the *Administration Center* for recommended working practices.
- A series of conflicting changes to a link are detected by the Conflict Viewer but are not stored if another conflict to the link occurs before the conflict is reviewed in the Conflict Viewer. For example, if these two conflicts occur:
 - A site changes the direction of a link and another site changes its strength.
 - A site changes one of the ends of the same link and another site changes its strength.

Only the second conflict is displayed in the Conflict Viewer; the first one is resolved automatically and cannot be reviewed.

- Where a site modifies a field on a link and another site deletes the link end entity for the same link (and therefore deletes the link), deleting the link is the only possible outcome for the conflict. In the Conflict Viewer, you must select the version of the record that is marked as deleted. If you try to keep the version of the record that was modified, you see the message *This link is not valid, because one (or both) of the end records is no longer accessible.*
- Links where different sites change one or both of its link end entities is detected by the Conflict Viewer as a change to the link, and not as a conflict. In the Conflict Viewer, there will be no visible difference between the two records apart from the **Modified Date** and **Modified By** fields. See the *Administration Center* for an example of this.
- The Conflict Viewer handles conflicting changes to entities and their links arising from direct editing or deleting of the records; it does not handle conflicts arising from merging entities or occurring in the records affected by a merge operation.

A typical conflict arising from a merge is, for example, someone editing a link or entity prior to someone else performing a merge in which the entity or link is deleted. The Conflict Viewer cannot display the context in which this conflict arose, and it is not possible to use the Conflict Viewer to restore it to its original state.

For this reason, you need to establish a procedure for reviewing and merging entities so that only one user at a time merges entities, preferably using the publication database. You should also review any existing procedures which may add to the number of duplicates in the system which require merging. See the *Administration Center* for a suggested procedure for merging entities.

Coordinate Extensions

The auto-detect feature in the Coordinate Conversion dialog expects you to use the standard thousand separator character for your locale:

- The use of spaces as thousand separators is not supported for the British National Grid coordinate system.
- The use of spaces as thousand separators is not recommended for:
 - Universal Polar Stereographic
 - Universal Transverse Mercator, zones 1 and 2.

Note: In these cases, the use of spaces as thousand separators makes it difficult for the auto-detect functionality to tell the difference between a space and a thousand separator with the result that it is not possible to identify the difference between one format and another.

Entities and links

- When Soft Delete is turned on, restoring records after merging will restore all the old entities and links as well as the new links created during the merge.
- If you set the Short Date format in Regional Settings to a non-standard format for the selected locale, you will get an *iBase* error when you enter a date value.
- If you set the Short Date format in Regional Settings to a 2-digit year instead of a 4-digit year, then date values are accepted but are saved incorrectly.
- When you open the Matching Records dialog, it will retrieve all matches for an entity (based on either the Discriminator fields or the fields you selected the last time you used the dialog). The dialog will not appear until all the matches have been retrieved, which can take a long time if there are a very large number of matches. To pause the retrieval and display the dialog, press the ESC key.

- The following limitations apply to the Assign Icons dialog:
 - Because icon shading is done in the Assign Icons dialog, you can only change the icon color of an entity record when the icon is in the icon list defined for the entity type or when the entity type definition has no icon field.
 - A user who is denied access to the Assign Icons dialog cannot apply a shade to an icon.

Full-Text Search (iBase Standard/Premium only)

When using Full-Text Search, you can only search for a subset of the characters in the code page (character set) specified for your installation. Excluded characters are ignored at the beginning of a word. If an excluded character occurs within or at the end of a word, an error message is displayed which prompts you to remove the character before searching again. For further details on the restrictions, see the online help.

iBase Database Replication

Replication is configured and run in SQL Server; it is not a function of *i2 iBase 5 Database Replication*. While replication is configured, data can be added (whether manually or by scheduled import), edited, and deleted. Once replication is disabled, it is no longer configured in SQL Server and any changes that are made to the data cannot be replicated to other sites and will not be replicated even when replication is reconfigured.

Never allow users to open the databases until the SQL Server administrator informs you that replication is configured.

Note: Replication may be temporarily stopped because it is suspended by the SQL Server administrator or interrupted by a technical problem. When this occurs, users can continue working even though changes cannot be replicated between sites until replication is restarted. However, you may want to consider the types of task that are allowed in this situation, for example importing. See the *Administration Center* for further details.

A memory leak may occur when the Merge Replication Agent retries a connection in SQL Server 2005, and the Merge Replication Agent is running continuously. For detailed information, see this article on the Microsoft Web site:

<http://support.microsoft.com/kb/936891>.

Additional limitations are also described in the limitations for *iBase Designer* below.

iBase Designer

- Running Performance Tuning on an SQL Server 2005 database requires VIEW DEFINITION permission on the database; this is not required for SQL Server 2000. You need to grant this permission to the user mapped to the SQL Server login specified in the *iBase Database Properties* dialog. You can use an SQL script similar to this:

```
GRANT VIEW DEFINITION TO username
```

For example, if users connect to *iBase* using Windows authentication, and the user who is running Performance Tuning is called `iBaseAdmin` and is a member of the `YourDomain` domain:

```
GRANT VIEW DEFINITION TO [YourDomain\iBaseAdmin]
```

We recommend that you revoke this permission after running Performance Tuning:

```
REVOKE VIEW DEFINITION TO username
```

- In the Database Properties dialog, you can only enter SQL Server login names and passwords that contain the characters 0–9, A–Z and underscore characters. You cannot use punctuation or accented characters.

- A database name should uniquely identify the database, not only within your *iBase* system but also when the database is used with third-party *iBase* databases when charting or mapping. It is possible to add records from the databases to the same chart or map through different sessions.
- When you change the database identifier, the modified identifier is not applied until you log out of *iBase Designer* and back in (to either *iBase* or *iBase Designer*).
- It is no longer possible to reduce the size of a field in JET or SQL Server. If required, it can be done by exporting the data to be truncated along with the record ID and then deleting the field and creating a new one of the desired size. You should then import the data using record ID matching—errors will be displayed if the data being imported is too large for the target field.
- An error will occur during data entry if you delete a mandatory icon field from an entity type. To fix this error, add the icon field to the entity type again, turn off the mandatory setting, and then delete the icon field.
- On a Terminal Services Client PC, an entity type icon for Fuchsia Square, Circle, Pyramid and Diamond is gray not fuchsia.
- Field display formats for numbers, and dates and times must be specified in English format irrespective of the current locale. For example, in numerical formats, use period (.) for the decimal point and comma (,) to group thousands.
- Copying a filtered pick list to another database will not copy the assignments between the child and parent list. To retain the association, you should export and import the pick lists before copying and pasting the fields.
- The following limitations apply when *iBase Database Replication* is used:
 - The names of *iBase* databases and security connection files created on SQL Server 2000 must not exceed 19 characters. This allows for a four-character suffix to be added when upsizing to SQL Server format, and guarantees that the job names created in SQL Server remain unique. This is because the first 23 characters of the SQL Server database name are used as the job name. If two database names only become unique after the 23rd character, replication may fail to run correctly when earlier jobs are overwritten by later ones with identical names.
 - It may take a long time to initialize a large database for replication.
 - With SQL Server 2005, you will be warned when you open a replicated database in *iBase Designer*. However, although changes to the database schema are not discarded, they cannot be completely replicated. Changing the schema when replication is configured, may prevent you from using the File Manager and the Update Database Schema dialogs to update the schema.

Importing and exporting

The following limitations apply to bulk import:

- *iBase 5* bulk import is designed to import large quantities of data during administration periods. The bulk import function should not be used when there is the likelihood that one or more users will be accessing the database at the time of the data import, unless you are using *iBase Scheduler*. Administrators wishing to import data when the database is being used should revert to the standard *iBase* import specification functionality.
- Audit level 4 or 5 will not log the creation or update of individual records; only the start and end of the import operation is logged.
- For Multi-Line Text (Append Only) fields, bulk import adds your name and the date and time to existing records only; a standard import would add them to both new and existing records.

- When you import data and select **From Import Source** for the link strength and direction, the link strength and direction are used as identifiers which you cannot change.
- When importing data from Excel:
 - The last field of every row must be populated with data.
 - The data type of a column is determined by the values in the first 10 rows. A problem can occur if there are mixed numeric and alpha data in a column. In this case, whichever is the predominant data type, sets the data type of the column and *iBase* will skip any values that do not conform with the expected data type.
- Date and time limitations:
 - There are limitations to using **Auto Detect Format** when the Regional Settings for AM/PM are set to blank. As a workaround, you will need to check imported data for unexpected values.
 - It is not possible to use alphanumeric characters as a time separator in the Format dialog of the Import Wizard. Valid characters include colons (:), spaces, and periods (.).
 - The date format in the Import Wizard always defaults to a MM month, even if MMM is specified in the machine's regional settings. To change to a MMM month, click **Format** in step 2 of the Import Wizard.
- An error occurs on step 4 of an import when the import source is a Microsoft Access database that contains linked tables, and the database containing the physical tables no longer exists.
- After importing large quantities of records into an *iBase* MS Access database, you should compact the database using **Repair/Compact** on the **Tools** menu in *iBase Designer*.

Installation and configuration

If in the system Regional Settings the default delimiters for date and time are exchanged, for example date delimiters are : and time delimiters are -, then *iBase* will not run.

Localization

- Microsoft does not support all language environments for Full-Text Search with SQL Server databases. However, as a workaround, you can set the server configuration parameter **default full-text language** to 0 (Language Neutral). You can do this in the Microsoft SQL Server Query Analyser by using these commands:

```
exec sp_configure 'default full-text language', 0
reconfigure
```

With a Language Neutral setting no inflectional forms can be found and the noise file `noise.dat` (SQL Server 2000) or `noiseNEU.txt` (SQL Server 2005) is used, which by default contains English noise words. To edit this you must be an administrator with access to the file, and you must stop the Microsoft Search service before editing and then, when you have finished, repopulate the full-text index.

- A database created in one language environment cannot be opened in another language environment from a different language group. The supported language groups for *iBase* are Western Europe and United States, Central Europe, Turkic, and Cyrillic. Do not attempt to insert characters into a database that are not included in the character set for your language group.
- When copying and pasting from *iBase* into another application, the keyboard locale must match that of your operating system. For example, you cannot copy Greek or

Russian text from *iBase*, then select English as the language locale, and then paste the text. On pasting, you will lose the non-English characters.

- Russian Windows XP: in *iBase* (not *iBase Designer*), some drop-down lists do not recognize Russian characters entered in order to go to items in the list that start with that character. This occurs in the Query dialog (in the fields in the query conditions area), and in the Purge Deleted Records dialog (in the **Deleted by This User** list).
- Russian Windows XP: if you use Regional Settings to change the default delimiter for thousands (a nonbreaking space <NBS> character) then, when importing data into *iBase*, you will not be able to change the delimiter back to a <NBS> character by using the Date/Time & Number Formats dialog. The workaround is enter it by holding down the ALT key and, using the numeric keypad, type 0160 into the **Thousands separator** field in the Date/Time & Number Formats dialog. Alternatively, you can copy and paste the character either from another Windows application or from the Regional and Language Options in the Control Panel.
- Turkish and Russian Windows XP with SQL-server databases: the Browser and Audit Log Viewer sort incorrectly on calculated numbers when you sort the data in a column by clicking its heading.
- Turkish Windows XP: there is a known problem with Turkish Windows XP Regional Settings that confuses seconds and hours when entering or manipulating times. This affects all programs that use the Regional Settings for time data including *iBase* 5.

Microsoft Windows Vista

iBase 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 *iBase* 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 *iBase* are claimed to be supported on Vista by their suppliers. As they become available i2 will include supported versions of third party components in future releases. Unless stated in the known issues below the third party components have not been shown to cause issues.

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

iBase 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>

- **i2 files cannot be indexed and searched by Vista search mechanism**

The files created by i2 Products cannot currently be indexed and searched by Windows Vista search mechanism.

- **Document Properties do not work on Windows Vista**

Some entries in the summary information are not visible on Windows Vista. The 'Description' and 'Origin' sections are not visible through Explorer.

power2

- The version of the Semantic Type Library used by a database may be different to the version of the library installed on the local machine, and there is no requirement for you to upgrade the database version to this later version. However, the difference in the versions will prevent Suggested Properties from displaying in the tree view.
- When defining semantic queries, you cannot use the following abstract types: Abstract Binary, Abstract Date & Time, Abstract Date, Abstract Time, Abstract Number, Abstract Currency, Abstract Text, Abstract Memo or Abstract Flag.

Printing

There is a visible dark background to icons when printed using a PostScript printer driver.

Purging and restoring deleted records

- You should avoid deleting records in the hour after the clock has been put back. This is because it is possible for the links to be recorded as deleted before the entities, which would create a problem if these records need to be restored.
- Deleting a batch of records across a date boundary (in one transaction), then restoring records for each of the two days as two separate restore operations does not restore all records if done in chronological order. As a workaround, you need to restore in reverse chronological order.
- The following limitation applies if *iBase Database Replication* is used: in the Restore Deleted Records dialog, the **Record Links** button displays the links for the selected entity in the old style Links dialog.

Querying and Scored Matching

- When querying a date/time field, a comparison of 'after' with the time portion of the date/time entered as '00:00:00' will not return any records for the specified date. You need to either enter the day before and exclude the time portion; or change the condition to 'Same As Or After'; or set the time to '00:00:01'.
- If you use a combination of AND and OR conditions you must use brackets to specify the query explicitly, otherwise the query will be invalid. In previous versions the query may have given unexpected results.
- On Jet databases it is not possible to run a query with a condition where the text contains the ^ character.
- Running a query where there is a count on one of the entities and a condition on the link will return erroneous results because the count is evaluated before the condition on the link.
- In a query, you cannot enter a value of * for a parameter if you intend to use the query as conditional input to another query. As a workaround instead of entering `name is like *`, you could enter `name is like @*`. This then adds * to the list of allowable values and * appears as the default value.
- You cannot parameterize queries that use semantic conditions.
- There are limitations on using fields that are assigned filtered pick lists in the Query and Query Parameters dialogs:
 - In the Query dialog, you can create a condition based on a field of this type, but filtering will not work as expected: selecting a parent list item will not filter the fields in the child list.
 - Using a mixture of parameters and specified values, you are allowed to specify invalid combinations of parent/child list items.

- Incorporating a Source selection in a query will prevent filtering of the child pick list.
- In the Parameter dialog, fields that have filtered pick lists assigned to them must be consecutively ordered if you want the parent pick list to filter the child pick list. However, filtering does not work if you specify a value for the parent pick list and set up the query to prompt for a value from the child pick list. The user will be able to select any value at the top of the hierarchy as expected but this can cause the specified child item value to become invalid.
- You cannot use Scored Matching with a query such as 'link count = 0' (e.g. 'give me all the people who have no address links'). This results in an incorrect syntax error.
- The In List and Not In List conditions are not available in Scored Matching.

Reports

- A limitation in Microsoft Access means that when you run a second report that adds data to the open Access database, tables are created correctly but relationships may not be. This only occurs when adding data to an existing Access database from an *iBase* report when the Access database is already open.
- Pictures cannot be displayed in RTF reports.
- Although you can save Word templates created from *iBase* reports as .DOT files, these are not actual Word Document Templates.

Scheduler

- The first time that the Scheduler service is started it may time out with error number 1053. It will start successfully the second time, and on subsequent occasions.
- New connections are automatically tested when you save a connection in the *iBase* Scheduler Configuration dialog (without first testing the connection). You will not be able to save the connection if it fails this test.
- If the database is opened in *iBase Designer*, scheduled imports will not be able to run and, similarly, if a scheduled import is in progress, you will not be able to open the database in *iBase Designer*. You will be able to open the database in *iBase Designer* once the import completes. For further information on using these two products together, see the Help for the *iBase* Scheduler Configuration dialog.
- Two or more Scheduler services cannot access the same Scheduler database.
- You may experience problems when entering the destination for a .mdb file using a UNC path. You cannot browse to the file and you will need to copy/paste the path from Windows Explorer.
- You cannot use *Scheduler* with *iBase Database Replication*.

Security and the Security Manager

- Data entered in the User Information dialog only becomes available to other users when they log in to *iBase* after the change has been made.
- Users cannot re-categorize a folder object from public to restricted while another user has that object visible on the screen.
- When using an *iBase* database with large numbers of security groups (1000+) and users (250+), the Security Design report, available in both *iBase Designer* and *iBase*, will take a long time to generate, and an out of memory error will occur.

- When SQL Server authentication is used, passwords containing non-alphanumeric characters cannot be implemented for logins that are used in the *iBase* connection file. For example, passwords cannot contain characters such as @, £, !, - and *. This is also true for *Data Miner* which always uses SQL Server authentication to access the database.
- When *iBase Database Replication* is used the following limitations also apply:
 - Using a replicated *iBase* database with an unreplicated security file reduces the security of your system—if you are replicating the database, you should implement a unified and global security policy. This is particularly important if users can log on remotely to any server in the *iBase* system. Local security policies can potentially give users access to different commands and data depending on the server they log on to.
 - When configuring replication, all sites selected as subscribers must start with a copy of the Microsoft Access security file created at the publisher site. You must retain a copy of this if you plan to extend the system in the future by adding new subscribers.
 - A conflict can occur when one site deletes a user or group that another site is working on (for example by adding users to a group that another site has deleted or by deleting a user that another site has added to a group). The conflict is automatically resolved in favor of the site that made the change first. When this occurs, a warning is displayed and you need to close and reopen the Security Manager. In a replicated environment, it is not necessary to log off and then log on again as indicated in the message.
 - In the event that a communications link goes down, there is an increased risk of the different sites adding duplicate users—the duplicates will only be detected once the link is restored. To avoid this, we strongly recommend that you devise a naming convention for users that includes a location identifier in the user name. This allows you to continue to add new users even when the communications link is down.
 - To refresh the user groups and users displayed in the Security Manager, close and reopen the Security Manager. Updates from other sites are only displayed at this time.

TextChart

- A template can include multi-line text (append only) field types; however, the text will not be editable in *TextChart*.
A potential problem may arise however if the data capture is done by an experienced *iBase* user who expects multi-line text (append only) fields to behave in *TextChart* as in *iBase*.
- The source references used in *TextChart* should not exceed the length of the *iBase* field assigned for source references, which can be a maximum of 255 characters—visualizations containing source references longer than this cannot be loaded into *iBase*.
A source reference is most likely to exceed this limit when an item in a visualization is created from several source documents. The source reference for this item will be concatenated from the individual source document references when the visualization is saved.
To fix a problem with long source references, use *TextChart* to make the source references for the individual source documents as short as possible.
- When you reload a visualization containing more than one source document, *iBase* may not detect a match in an unchanged source document. This occurs when an item was created from the data in the unchanged source document, and the same item is

updated with a new markup from a second document. Although the first document is identical to the originally loaded one, *iBase* fails to find a match. Under these circumstances you will create a duplicate source document entity.

- *TextChart* does not support icon shading when used with *iBase*.
- *TextChart* charts can be opened in *Analyst's Notebook* and analyzed using the *iBase* functions on the shortcut menu. However, you may experience unexpected results if the chart was built up using data from multiple *iBase* databases with the same names. For details, see *Charting to Analyst's Notebook* on page 24.
- The following limitation applies to *iBase Live*: it takes a long time to close a workspace and display the Add Marked Up Documents dialog if the workspace contains a large number of documents.

Update Database Schema

The following limitations apply when *iBase Database Replication* is used:

- The Save Schema Update Details dialog does not gain focus when it appears after a user clicks the **Write** button in the Update Database Schema dialog.
- You cannot use the Update Database Schema dialog if you are a member of a Data Access Control group that denies access to a table or field.

Word Search

- Excluded words in Word Search are now restricted to 20 characters.
- You cannot use Word Search in a case-controlled database.
- When a database is upsized, the Word Search index is lost, including any synonyms that have been set up. In the upsized database, this information is held as part of database.

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 these release notes, in the *Administration Center*, or 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.