

iBase 8 Release Notes

Version 8.1.1
May 2010
Part Number: 2487

iBase is i2's investigative database. It provides capabilities to configure a data store, capture data, and perform analysis all in a controlled environment. It integrates fully with *Analyst's Notebook 8*.

iBase 8.1.1 can be installed on its own or as part of *Analyst's Workstation 8*. Installing *iBase 8* will automatically uninstall *iBase 5*.

Existing *iBase 5* security files and databases must be upgraded to *iBase 8* in order to make available the new features in *iBase 8*. *iBase 5* users can continue to work in an *iBase 5* database using an *iBase 8* client, but these users cannot use the new features in *iBase 8* until the database is upgraded.

For systems that are currently running *iBase 8.0*, we recommend upgrading to *iBase 8.1* to take advantage of the improvements in performance and stability.



Warning: new *iBase 8.1.1* features require Unicode databases



As part of the process of upgrading to *iBase 8.1.1* any databases that have not been converted to Unicode should be converted as part of the upgrade process before any of the new features are used. Failure to ensure that your databases are converted to Unicode may result in significant performance issues.

Please note: Unicode conversion will increase the size of your database considerably, and you will need to ensure that you have significant disk space before beginning the upgrade process. We recommend running the upgrade on a test environment before attempting to upgrade any live system, and that a backup is made before the upgrade is started.

For further information about the upgrade process, please refer to the *Upgrading to iBase 8 or Analyst's Workstation 8* White paper that is available on your product CD.

For further information to aid with the upgrade process please refer to the premium content available on our website: <http://customers.i2group.com>

If you are not able to convert your database to Unicode, please contact our support team for alternatives.

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Addresses:

i2 Limited, The Visual Space, Capital Park, Fulbourn, Cambridge CB21 5XH, UK
Tel: +44 (0)1223 728600 Fax: +44 (0)1223 728601

i2 Inc., 1430 Spring Hill Road, Suite 600, McLean, Virginia 22102, USA
Tel: +1 703 921 0195 Fax: +1 703 842 4685

www.i2group.com

Release contents

The following table summarizes the *iBase* releases:

Version	Release date
<i>iBase</i> 8.1.1	May 2010
<i>iBase</i> 8.0.5 (<i>Japanese Only</i>)	January 2010
<i>iBase</i> 8.0.3	December 2009
<i>iBase</i> 8.0.1	December 2009

The *iBase* 8 release includes the following program features – some of which are separately licensed:

Program feature	Description
<i>iBase</i>	Use <i>iBase</i> 8 to work with either MS Access or SQL Server databases.
Designer	Use <i>iBase</i> 8 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>iBase</i> 8 <i>Scheduler</i> to schedule batch imports and exports.
Coordinate Extensions	Use <i>iBase</i> to store data entered using multiple coordinate systems, in the same <i>iBase</i> database.
Schema Update	Use <i>iBase</i> 8 to update database schemas from a template (requires <i>iBase</i> 8 <i>Designer</i>).
Database Replication	Use Microsoft SQL Server merge replication to enable distributed use of <i>iBase</i> 8.
<i>iBase</i> GIS Interfaces	Interface to GIS products (excluding Google Earth, which is provided by a plug-in to <i>Analyst's Notebook</i>). See the <i>iBase GIS Interfaces 8 Release Notes</i> for details.
Plate Analysis	Analyze ALPR (Automatic License Plate Recognition) data stored in an <i>iBase</i> database. See the <i>Plate Analysis 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 8.1 is a major release, delivering new customer-driven functionality and significant enhancements to existing features. In addition it delivers increased performance and improved Search 360 and datasheet support, includes greater flexibility for XML import, supporting XML in both the *iBase*-defined and in the MS rowset schema and provides a significant number of bug fixes.

iBase 8.1 supersedes *iBase* 5 and *iBase* 8.0 as the next major version. At this release all major version numbers for the existing i2 product set family have been rationalized to version 8.

The functionality in *iBase* 8.1 is a superset of the functionality in *iBase* 5 and *iBase* 8.0 and therefore *iBase* 8.1 is able to benefit all existing *iBase* users as well as new customers. All existing customers should upgrade to *iBase* 8.1; all new customers should be supplied with *iBase* 8.1.

The product is targeted at intelligence and investigative analysts working in the supported regions. Target markets include Law Enforcement, National Intelligence, Government, Military & Commercial applications.

Notes for existing *iBase* users

It is of utmost importance that you make a complete backup of your existing *iBase* configuration and databases before and after you perform the upgrade. To back up your system, follow the instructions in the *Upgrading to iBase 8 or Analyst's Workstation 8 Whitepaper* to ensure that the upgraded databases are successfully backed up and your changes stored.

Note: Ensure that backups are stored in different secure locations to insure against any unforeseen issues.

Installing *iBase* 8.1.1 replaces any installation of *iBase* 5 and previous versions of *iBase* 8. It is not possible to run version 5 and version 8 simultaneously on the same computer.

If a comparison is required between *iBase* 8.1.1 and an earlier version of *iBase*, these should be set up on separate systems.

Note: If you have already installed a pre-release version of 8.1.1, you should rollback your system to the previous full release version before installing this release, or install on a clean machine.

In order to ensure that the upgrade has installed all the features correctly, the database should be opened and closed in *iBase Designer* 8.1.1 before use. After you have upgraded a database using *iBase* 8.1.1, you should not attempt to access that database with a version of *iBase* earlier than 8.1.1.

Note: Uninstalling *iBase* 5 *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.

Compatibility of security files and databases with *iBase* 5

iBase 8 security files and databases cannot be opened in *iBase* 5.

Upgrading to *iBase* 8.1

You will need to upgrade existing databases and security files to *iBase* 8.1. This process is straightforward, but requires consideration and planning in order to safeguard your data during the upgrade.

The upgrade process for *iBase* is described in detail in the *Upgrading to iBase 8 or Analyst's Workstation 8* White paper. This document, which explains when and how to back up and restore data; how to upgrade *iBase* client software; and how to upgrade *iBase* databases, is included on the *iBase* 8.1.1 product CD. We strongly recommend that you read the white paper before embarking on any upgrade from *iBase* 8.0 or earlier.

In order to take advantage of all the new features of *iBase* 8, your databases must be hosted on SQL Server 2005 or 2008. If your databases are currently hosted on SQL Server 2000, the *Upgrading iBase databases to SQL Server 2005 or later* white paper (also included on the *iBase* 8.1.1 product CD) explains how to perform an upgrade safely.

Compatible companion products

You may have licensed one or more *iBase* companion products or have installed *iBase* 8 as part of *Analyst's Workstation 8*. The following versions of companion products also work with *iBase* 8.1.1: *Analyst's Notebook 8.5*, *iBase GIS Interfaces 8*, *iBase IntelliShare 8.5.3*¹, *TextChart 8* and *TextChart AutoMark 8*.

Note: The following versions of *iBase IntelliShare* are not supported by this release: v1.0.1 or v1.1.1.

Microsoft Office

iBase interoperates with applications in the following versions of Microsoft Office: Office 2003 (all editions) and 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) and Office 2007 (all editions)

Note: Office 2007 is not supported if the Office 2007 Compatibility pack is installed for Office 2003.

Supported data sources

iBase 8 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 computer.

¹ This version is not currently released, please contact your Account Manager for further information.

System requirements for iBase clients

Hardware

At release, these are the minimum desktop hardware requirements for *iBase 8*:

Requirement

1.4 GHz processor computer

512 MB RAM

500 MB free disk space for installation, plus space to store chart data (this does not include disk space required for prerequisites)

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)

CD-ROM drive or network access (for installation)

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 (this does not include disk space required for prerequisites). 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

Mouse or trackball

USB Port or Parallel Printer Port (for local dongle)

CD-ROM drive or network access (for installation)

When considering your system requirements, you also should take the following into account:

- If you are planning to install *iBase GIS Interfaces*, you should check the system requirements for any GIS applications you use as these may exceed the recommendations given.
- 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.
- The underlying operating system may affect your hardware requirements. For example, Windows XP and Vista consume more resources for the core operating system than Windows 2000, so it may be necessary to increase the amount of RAM for these platforms.

Operating systems

At release, these are the supported operating systems for *iBase* 8 clients:

Desktop operating system

Windows 7 Professional/Ultimate x86 (32-bit) and x64 (64-bit)

Windows Vista Business/Enterprise/Ultimate x86 (32-bit) and x64 (64-bit) SP1 or later

Windows XP Professional x86 (32-bit) and x64 (64-bit) SP3 or later

Windows 2000 Professional SP4 (or later) and Security Update KB835732, or Update Rollup 1 (KB891861)

Server operating systems offering thin client environments

Windows Server 2008 x86 (32-bit) and x64 (64-bit) with Terminal Services enabled

Windows Server 2008 R2 x64 (64-bit) with Terminal Services enabled

Windows Server 2003 Standard/Enterprise x86 (32-bit) and x64 (64-bit) SP2 or later with Terminal Services enabled

Windows Server 2003 R2 Standard/Enterprise x86 (32-bit) and x64 (64 bit) SP2 or later with Terminal Services enabled

Windows 2000 Advanced Server SP4 or later with Terminal Services enabled

Note: All server operating systems are also supported with Citrix MetaFrame Presentation/Xen App Server 4.0 or later.

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, Turkic, Arabic, and East Asian regional versions of the supported operating systems.

Note: You cannot open a non-Unicode *iBase* database that has been created in a different language environment from your own.

If using a regional version of *iBase*, you must ensure that the Windows account that is used to run the *Scheduler* service is set up to run using the correct locale information.

More information can be found on Microsoft Website:
<http://www.microsoft.com/windowsxp/using/setup/expert/reginalsup.msp>

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

Virtual machine environments

iBase 8 is supported in virtual machine environments running on any of the operating systems listed above. If any issues are found and are reproducible by i2 in the following virtual machine environments:

- Citrix XenServer
- VMWare Workstation 6 or later

- VMWare ESX Server 3 or later
- Microsoft Hyper-V

i2 will treat them as issues and attempt to fix or offer a workaround as long as the cause is not within the VM vendor's software layers.

Additional third party software

iBase requires that Microsoft .NET Framework 2.0 SP1 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 requires that `reportviewer.exe` is installed. This program is included on the CD in the `Pre-requisites` folder.

The 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.

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`.

Note: If you are planning to use SQL Server 2005 or SQL Server 2008 then any client machines on which 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.

System requirements for iBase 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. For example, *iBase 8* systems that use Search 360, Alerting, and Audit History will make greater demands on your server. Suitable machines are specialist high performance server machines with high performance disk subsystems and large amounts of physical memory and disk space.

Operating systems

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

- Windows Server 2008 x86 (32-bit) and x64 (64-bit)
- Windows Server 2003 and Windows Server 2003 R2 Standard/Enterprise SP1 or later
- Windows 2000 Server/Advanced Server SP4

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/editions for *iBase* servers are:

SQL Server 2008	Standard Edition Enterprise Edition Workgroup Edition Express Edition
SQL Server 2005	Standard Edition SP2 or later Enterprise Edition SP2 or later Workgroup Edition SP2 or later Express Edition SP2 or later
SQL Server 2000	Standard Edition SP4 Enterprise Edition SP4 Personal Edition SP4 Note: SQL Server 2000 is not supported on clients with Windows Vista.

iBase does not support case-sensitive SQL Servers.

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

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 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 Standard/Enterprise editions of SQL Server 2000, 2005, or 2008.

Note: The publishers and subscribers in a replicated *iBase* system must all use the same version of SQL Server – 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.

Additional requirements for Search 360

You may need to install an iFilter for each document type you want to search. iFilters for Microsoft Office 2003 are likely to be installed already, but you may need to install iFilters for Office 2007. Installing Adobe Reader 9.1 will install an iFilter for PDF documents. See the *Administration Center* for further details.

Additional requirements for Full-Text Search

Search 360 is the recommended replacement for Full-Text Search. However, if you want to use Full-Text Search, you must install the Full Text Search components from the SQL Server installation CD.

To allow Full-Text Search indexes to be built for Microsoft Office 2007 documents as well as PDF documents, you need to install the appropriate iFilters on your server. See the *Administration Center* for details.

Authorization information

i2 products are licensed products and require a dongle containing a valid permit in order to run. *iBase* 8 uses the same dongle permits as previous versions of *iBase*. Therefore existing users do not require a replacement dongle. A dongle exchange will however be required for customers using additional license options.

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.

NetHASP License Manager

If you use a NetHASP authorization solution (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.

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.

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 (`C:\WINDOWS\System32`, for example) 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.

Product authorization in a virtual machine environment

If you are using i2 software in a virtual machine (VM) environment you will need to consider the following for reliable product authorization.

Hardlock (USB/parallel port)

If you are using a Hardlock (standalone) dongle you need to ensure that your virtual machine environment has support for the port type of the dongle you are using (USB or Parallel).

NetHasp (USB/parallel port)

i2 strongly recommends that NetHasp (network) dongles and the License Manager software is installed in a non-virtual machine environment on the same network as the i2 products that require authorization.

Documentation and examples

The *iBase* documentation is updated for this release and, with the exception of the *Administration Center*, is automatically installed with the product.

Information for administrators

Information specifically for administrators of *iBase* and *Analyst's Workstation* is provided in the *Administration Center*. To install this documentation from the product CD, select the **Custom** installation option. An **Administration Center** shortcut will be added to the **Start** menu under the **i2** program group. You can also run the *Administration Center* from the CD by double-clicking 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.

i2 Products Packaging and Deployment Guide

The *i2 Products Packaging and Deployment Guide* is supplied on the CD in PDF format. The guide location is: `CD:\i2 iBase 8\Deployment\`

White papers

The following white papers are available on the product CD:

- *Upgrading to iBase 8 or Analyst's Workstation 8*
- *Upgrading iBase databases to SQL Server 2005 or later*

These white papers are available from your supplier:

- *iBase 8 Product Overview*
- *What's New in iBase 8*
- *iBase 8 Security Overview*
- *Using iBase 8 with TextChart 8*
- *Using iBase 8 in a Distributed Environment*
- *iBase 8 Database Replication Product Overview*
- *iBase 8 Database Replication Deployment Guide*

Information for users

The following manuals are supplied in PDF format for *iBase 8*:

Manual title	Part number
<i>iBase 8 Quick Start Guide</i>	2144
<i>iBase 8 User Guide</i>	2481
<i>iBase 8 Reporting Guide</i>	2140
<i>iBase 8 Importing Guide</i>	2223
<i>iBase 8 Designer Guide</i>	2482
<i>iBase GIS Interfaces 8</i>	2142

i2 manuals are example-based, and are designed to help users learn how to use the software. You should install the User Guide database supplied with the software so that users can work through the examples.

The manuals are typically installed to: C:\Program Files\i2 iBase 8\Resources\language\Documentation.

Example material

An example database called *Designer Guide* is installed with the product for use with the *iBase 8 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 *iBase 8 User Guide*; instructions for setting up the database are given in the *iBase* help.

Both databases can be opened from the **i2 ▶ i2 iBase 8 ▶ Documentation** program group on the Windows **Start** menu.

Utilities

iBase 8 utilities are accessible from the Windows **Start** menu in the program group **i2 ▶ i2 iBase 8 ▶ Tools**. For information on using these utilities, see the *Administration Center*.

Installation

Before installing *iBase 8*, check that your system meets all the requirements described in *System Requirements for iBase Clients* on page 4. The operation then proceeds differently depending on whether you have an existing installation of *iBase*, and which version of *iBase* it is.

Installing iBase 8 from scratch

Please read the *iBase GIS Interfaces 8 Release Notes* before installing *iBase*, as it is important to install i2 and third-party applications in the correct order.

Using Setup.exe

Note: Administrator privileges are required in order to install *iBase 8*.

To install *iBase 8*:

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

The installation will start automatically. If it does not start automatically, you need to browse to the CD to run *Setup.exe*.

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

Typical	Installs <i>iBase 8</i> along with its documentation.
Complete	Installs: <ul style="list-style-type: none">• <i>iBase</i> and <i>iBase Designer</i>• all tools apart from the <i>iBase Index Service Configuration</i> tool and <i>iBase Database Replication</i>• all the documentation, including the <i>Administration Center</i>
Custom	Allows you to select which parts of <i>iBase</i> you require. Note: 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. Note: For the <i>iBase GIS</i> interface to 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.

5. Follow the prompts to complete the installation.

The following shortcut will be installed: **i2** ▶ **i2 iBase 8**.

Note: If you installed the Coordinate Extensions option, then the following message may be displayed when you first start *iBase*: An application plug-in failed to load: i2 iBase Bulk Coordinate Converter. This indicates that a required environment variable has not yet been applied. To resolve this problem, either log off from Windows, or restart the computer.

Alternative installation options

Advanced options for installing this product are described in the *i2 Products Packaging and Deployment Guide*. This explains how to perform automated and silent installs and use the advanced features provided by the Windows Installer (MSI). It includes details on customizing installed files, third-party software installed, and language-specific files.

Upgrading from iBase 4 and iBase 5

The *iBase* 8.1.1 installer can upgrade *iBase* clients and databases from version 4 or 5 to the new version. Before doing so, you should plan the upgrade process to ensure the security of your data, and a smooth experience for your users. We recommend that you read the *Upgrading to iBase 8 or Analyst's Workstation 8* White paper that is included on the product CD before performing any upgrade of *iBase*.

Note: If you use SQL Server databases, you may want to keep a copy of *iBase* 5 on one of your machines for managing connections to SQL Server databases that have not yet been upgraded to *iBase* 8. For example, to change the connection details of an *iBase* 5 database after moving it to a new server, you must use the `SQLDBConfig` utility supplied with *iBase* 5 or *Analyst's Workstation 3*.

Upgrading from *iBase* 5 to *iBase* 8 requires the `i2.mxd` to be updated as part of the upgrade process. This file is not overwritten as part of the default installation process to prevent customizations being lost.

To upgrade the `i2.mxd`:

1. Choose the `i2_default.mxd` file.
2. (Optional) Add any customizations that you may have made to the *iBase* 5 version of the file (`i2.mxd`).
3. Save the file as `i2.mxd` (overwriting) the *iBase* 5 version.

Upgrading from earlier versions of iBase 8

The *iBase* 8.1.1 installer can upgrade *iBase* clients and databases from version 8.0.1, 8.0.3, and 8.0.5. Because the upgrade includes a database change, you should ensure that your data is backed up before running the installer.

When the installer finishes, you must complete the database upgrade manually:

1. Open the database in *iBase 8 Designer*.

A dialog appears advertising an available upgrade to Search 360.

2. Follow the directions in the application to upgrade the database.

If you omit to perform this step, Search 360 will be unavailable after the upgrade.

Note: This process will make changes to the indexes, and depending on your database structure may take a few minutes to complete.

In addition, *iBase 8* includes the facility to install the Search 360 indexer on its own, without also installing *iBase 8* or *iBase 8 Designer*. If you have taken advantage of this feature and installed the indexer on a separate machine, you must remember to upgrade that machine at the same time as your other *iBase* installations.

Upgrading when iBase is the only i2 product installed

Due to a problem with the Microsoft XML 4 SP2 components, a major upgrade from *iBase 5* to *iBase 8* can remove them. This problem occurs when *iBase 5* is the only i2 product installed on the computer and an upgrade to *iBase 8* is performed. If this problem occurs, the *iBase 8* installer reports Error 28101 and terminates the upgrade with the message that `iBase 5 must be uninstalled before installing iBase 8`. However, there are benefits from performing a major upgrade rather than uninstalling *iBase 5* because the upgrade will retain the feature settings from the *iBase 5* installation.

To avoid the error described above and allow a major upgrade, there are two workarounds available:

- Install another i2 product alongside *iBase 5* before attempting the upgrade. An example would be to install *ChartReader 8*. This is a free chart viewing application.
- Install *iBase 8* with the command line property `I2_UPGRADE_NO_ERROR=1`, which overrides the error and (after the install) performs an MSI repair operation that will correct the removal of the MS XML 4 components. Setting a command line property is explained in the *i2 Products Packaging and Deployment Guide*, which is provided on the product CD.

Configuring an installation of iBase 8

Information on setting up your installation is available in the *Administration Center*. This covers features such as *iBase Scheduler*, Search 360 Index Configuration, alerting configuration, auditing setup, and the configuration of bulk import and XML import.

Note: If you use the Reason for Action facility, you should update your command groups. In *iBase Designer*, select **Tools** ▶ **Database Setup** ▶ **Update Command Groups**.

Enhancements and bug fixes

User Interface Rendering

Due to problems with a third party component, in certain situations buttons could disappear from the User Interface, forcing users to exit *iBase* to get them to reappear. The component has been replaced, and this issue has now been resolved.

Search 360

The Search 360 mechanism has been modified to reduce the disk space usage and the time taken to run the indexing service. The general performance of Search 360 has been improved. In addition the following issues have been resolved:

- The time taken to save records with large attachments on systems with Search 360 has been improved. (Please refer to the known limitations section for added restrictions in this area).
- Searching for strings that include embedded URLs is now supported.
- Searching for associated terms (for example: Gene Hendricks; White BMW) is now fully supported.
- Search 360 Indexer can now index mandatory time-zone fields.
- Searches that include periods as part of a word, for example '.22 rifle' now complete successfully.
- The Indexer batch size is now configurable via a registry setting.
- An extra logging option has been added into the Search Indexer.
- If a search is run and the index is out of date, any results that have been modified to remove the search term since the index was last made will be clearly marked.

General performance and memory usage

The display controls have been replaced to improve the general performance of the User Interface. In addition the following specific areas have been enhanced:

List Performance

Performance has been improved within areas of *iBase* where lists of data, such as Queries or Sets, are displayed.

Bulk importing performance

In order to increase the performance of the bulk import process for large amounts of data, the audit logging process has been enhanced.

Reporting

The macro enabled Word document formats (*.dotm and *.docm) are now supported when creating report definitions.

Link Reporting

Link reports can now be created that allow you to sort results based on information that is present on link fields. These reports allow you to display information on any entity type that can be associated with the link type.

Query conditions

Date settings are now fully supported as part of query conditions.

Improved handling of large queries

The replacement of controls has led to enhancements in the performance of queries that have large numbers of results.

Datasheet field truncation

Fields that are displayed using datasheets are no longer truncating data due to improvements in the Tab control mechanism.

Datasheet link removal

The logging mechanism has been improved to support the removal of links from a datasheet. This will prevent an error message being displayed: '*Object variable or With block variable not set*' or '*Invalid procedure call or argument*' when links are deleted using datasheets.

Datasheet document support

The record card control has been improved to allow documents to be handled correctly when displayed using datasheets.

XML importing and exporting

XML importing and exporting now supports both the MS Rowset schema that was present in *iBase 5* and the new *iBase* schema that allows the import and export of data subsets.

Search 360 denial of access to results

Changes have been made to screen out links to entities that the user does not have the permissions to view.

Analyst's Notebook support

In order to prevent conflicts, the *iBase* toolbar is now disabled as default within *Analyst's Notebook*. This can be enabled, by disabling the *iBase* palette.

Known limitations

Upgraded SQL Server databases with Unicode support

SQL Server databases that have already been upgraded to *iBase 8.0* from an earlier version and have Unicode support enabled may experience one the following issues:

1. Entity or Link Types cannot be deleted using *iBase Designer*.
2. Performance problems when Queries or Find operations are carried out.

If you suspect that you may be affected by either of these issues, please contact Technical Support to help resolve the issue.

Note: This issue will not affect databases that have been:

- created in *iBase* 8.0 or 8.1
- upgraded to 8.1 before Unicode support was enabled
- Access databases that have been upsized in 8.0 or 8.1
- Databases created using *iBase* 4 that have not been performance tuned.

Resizing dialogs

When *iBase* 8 is in tabbed mode, displayed tab controls may not display correctly after the application has been resized.

Indexing unrecognized document types

If a document is submitted for indexing is of a type that the indexer does not recognize the index will be completed but the unrecognized document will be skipped.

Alerting

When performing large imports alerting jobs should be disabled to improve performance. This includes large automated imports including: import specifications, batch import specifications, bulk imports, and use of *iBase Scheduler*. Alerting jobs should be stopped before the import starts, and started again once the import has completed.

Alerting should also be disabled when backing up your database.

You can control the scheduling of alerting jobs in the Alerting Configuration dialog (in *iBase Designer*). More advanced scheduling options are available in SQL Server Management Studio. You can also manually disable alerting jobs in the Alerting Configuration dialog by clicking **Schedule** and turning off the **Enable** check box.

Warning: Do not click **Suspend Alerting**, as this will remove your alerting jobs.

Search 360

To prevent errors during indexing, a configurable limit has been added to the system that prevents documents over a certain size from being indexed for Search 360. The current default value for this limit is 100MB.

To increase the performance of search results a configurable limit has been added to the system that prevents documents over a certain size from returning excerpts as part of Search 360 results, if the search term is found within the document; the details will be present as part of the search results, but the document will need to be opened to view the matched information. The current default value for this limit is 0.5MB.

There are some limitations on how Search 360 performs in non-English language regions. When searching for non-English terms in a non-English *iBase* database, Search 360 does not support sounds-like, spelled-like, synonym, or substring matching. Only results containing exact matches for the search terms will be returned.

Full text search

After an *iBase* database has been converted to Unicode, *iBase* users may see the following error message when they try to rebuild the Full Text Search index:

```
File 'sysft_i2Catalog' cannot be reused until after  
the next BACKUP LOG operation.
```

To solve this problem run a SQL Server Transaction log back up. After performing the backup, the Full Text Search index should rebuild.

Moving an iBase 5 database requires that you upgrade it

If you move an *iBase* 5 database, you will need to open it in *iBase 8 Designer* in order to associate the security file with the database file. This action will require you to upgrade the database.

Dialog Performance with large numbers of Sets and Queries

If your database has several hundred Sets and Queries, the following dialogs may experience delays in opening:

- *Export Wizard*
- *Report Wizard*
- *Batch Edit*
- *Batch Delete*
- *Export to Excel*
- *Browse*
- *Field Calculator*
- *Assign Icons*
- *Duplicate Checker*

Replication

Contact i2 Technical Support for information on using *iBase Database Replication* and Alerting. For details of using *iBase Database Replication* with Audit History and Search 360, see the *Administration Center*.

Custom Icons

If Analyst's Notebook 8.5 has been installed alongside *iBase*, the new Analyst's Notebook icon set replaces the default *iBase* icon set. This will prevent icons that are stored in the default *iBase* location from being displayed, replacing the image with the 'any entity' (black circle) icon.

As a workaround:

1. Locate the required icons within the *iBase* image folder:

```
C:\Program Files\Common Files\i2 Shared\Images 7
```

2. Copy the custom icons to the 8.5 location:

```
C:\Program Files\Common Files\i2 Shared\Images 8.5\Legacy Support
```

Note: This does not affect icons that are stored in the custom shared images folder within your user's Documents and Settings:

C:\Documents and Settings\\My Documents\i2\i2
Shared\Custom Images

SQL Server 2000 databases

The following new features are not supported when using SQL Server 2000:

- Search 360
- XML import and export

The following limitations also apply: In Audit Viewer, any details are truncated to 4000 characters (Issue 8411) and the Audit History does not support Document, Picture, Hyperlink, or Multi-line text fields.

Opening an SQL Server 2000 database in compatibility mode in either SQL Server 2005 or 2008 will not resolve this issue. The database must be upgraded following the instructions in the *Upgrading iBase databases to SQL Server 2005 or later White Paper*.

SQL Server Express

There is no facility in SQL Server Express edition to manage the scheduling of alerting or Search 360.

Unicode support

In the Report Wizard, the Standard Report format does not support Unicode characters. As a workaround, you should select the Rich Text Format option.

XML Export

When a data subset has been created using a query that contains a parameter, the wrong message is displayed if the cancel button is pressed on the select parameter screen. The XML Export will however be cancelled, and will run successfully if the parameter is provided.

ArcGIS interface blank menu

Following an upgrade from iBase 5, users of the *iBase GIS Interfaces* may find a blank menu within ArcGIS that is labeled *iBase 5*. The options that were available under this menu are now found within the file menu, and the menu can be removed by updating the *i2.mxd* file.

Bulk Import with blank records

The Bulk Import will not import data from files that contain blank rows. To import the data present in these files, delete the blank rows before resubmitting the file.

Excel import issues

Excel determines the data types using a sample of the first 8 rows of the excel spreadsheet. This behavior is by design for the Microsoft Excel ISAM driver. The first 8 rows determine the data type of the column. In situations where this sampling is

insufficient, the data may be imported incorrectly. As a workaround, files can be converted to a CSV file before being imported.

More information can be found on Microsoft Knowledge Base:
<http://support.microsoft.com/kb/236605>

Word 2007 displaying RTF reports

When an RTF report is displayed or printed using Word 2007, some large fields may appear to be truncated. This data can be displayed correctly in Word 2003.

If a printed version of the report is required, we recommend printing the report directly or selecting the HTML option for exporting the report.

Microsoft Vista known limitations

“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 the Microsoft website at:
<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 the Vista search mechanism

The files created by i2 products cannot currently be indexed and searched by the 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.

Contacting i2

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

- For customers in North and South America, e-mail support.mclean@i2group.com.
- For customers in the UK or the Rest of the World, e-mail support.cambridge@i2group.com.

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

i2 Ltd and i2 Inc. Professional 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 website at: www.i2group.com.