

i2 TextChart 3

Release Notes

Version 3.0.1
June 2007
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i2 TextChart is an easy-to-use data visualization product that enables you to mark up, extract and visualize entities (people, places, things, and so on) and links from textual documents such as intelligence reports, witness statements, e-mails, questionnaires, and so on, to quickly build up a concise visual representation of one or several documents.

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Release Contents

The *i2 TextChart 3* release includes:

- *i2 TextChart 3*
- *i2 TextChart 3 Designer*
- *i2 iBase 5 Live*

What's New In This Release?

The following table summarizes the *TextChart 3* releases:

| Version | Release date |
|--|--------------|
| <i>i2 TextChart 3.0.1</i> (this version) | June 2007 |

TextChart 3 is a major product release providing new features, existing functionality enhancements, and bug fixes.

New features and enhancements in this release

This release includes the following new features and enhancements:

Improved, more flexible deployment

The Windows (MSI) compliant installer speeds up the installation of *TextChart* as well as offering integration with enterprise application deployment technologies.

Closer integration between *TextChart* and *iBase*

TextChart and *iBase* have been fully integrated through the introduction of *iBase Live*. Streamlined facilities allow a live connection to be established between a *TextChart 3* workspace and an *iBase 5* database, enabling the real-time transfer of information.

Improved find

Find in Documents, Find in Chart and Find Target Item searches have been combined into a single, easy-to-use search facility, enabling a consistent approach to searching.

In addition, Synonym, Spelled Like, and Sounds Like fuzzy search options provide the ability to find values that are similar to a search term, helping to capture information that may be missed by an exact match search.

Icon shading

The main shading color of an entity on a chart can be customized so that it conveys more accurate information about the real world object it represents, such as the actual color of a vehicle.

Icon shading can be defined at the entity type level using *TextChart Designer*, or set for an individual entity on a chart using *TextChart*.

Change type

It is now possible to change the type of an entity or link on a chart, obviating the need to delete and re-mark up items that have been created using the incorrect type.

Default grade values

Default grade values are now added to chart items automatically. The value used for each category of grade is the last grade defined for that category in the workspace template.

Office 2007 and OpenOffice 2 file format support

TextChart 3 supports Microsoft Office 2007 and OpenOffice 2 document formats:

- Microsoft Office Word 2007 (.docx)
- Microsoft Office Excel 2007 (.xlsx)
- OpenDocument Text (.odt)
- OpenOffice Spreadsheet (.ods)

Legend population option

The option to populate the legend from the chart is no longer displayed when defining a chart legend in *TextChart Designer*.

Default styles

The Box, Circle, Label, OLE Object and Text Block pages are no longer displayed when setting default styles in *TextChart Designer*.

Bug fixes in this release

This section lists some of the bugs fixed in this release. Note that this list is not exhaustive; only those issues of most relevance to users are included.

Undo proportional layout

Reported: 2.0.1

An undo operation after performing a proportional layout will now work as expected, even with charts that contain large numbers of controlling items.

Text files lose accented characters when added to i2 TextChart

Reported 2.0.1

Adding a text file (.txt) that contains accented characters to a workspace will no longer result in the removal of those accented characters.

Exception raised when attempting to reorder a numeric attribute slot having entered an invalid default value in TextChart Designer

Reported 2.0.1

Attempting to reorder a numeric attribute slot in *TextChart Designer*, having previously attempted to enter an invalid (non-numeric) default value, no longer causes an exception to occur.

System Requirements

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

Requirement

- 1.4 GHz processor computer
 - 512 MB RAM
 - 500 MB 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)
 - *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 (if not already installed, add: 280 MB for .NET Framework). Total disk space requirements depend on number of i2 products to be installed.
 - SXGA capable graphics card (1280 x1024 high color (16 bit)) and color monitor
-

These are the supported operating systems for *TextChart*.

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
-

TextChart is supported on the Western Europe & USA, Central Europe, Turkic and Cyrillic 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 & USA, Central Europe, Turkic and Cyrillic regional versions of Windows Vista will be available when we release a fully supported version of our products on Vista. *TextChart* is User Access Control (UAC) compliant.

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

TextChart 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.

On Windows 2000, *TextChart* requires that `msvcp60.dll` is present. This is not installed as part of the operating system nor any associated service packs; it is installed with other Microsoft applications. As its presence cannot therefore be guaranteed, a dedicated installer is provided on the CD.

The documentation supplied with *TextChart* is provided 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.

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

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

TextChart 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)

Authorization Information

TextChart is a licensed product and requires a dongle containing a valid permit in order to run.

Updated NetHASP License Manager

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

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

CD Drive:\Dongle\HASP Server\Windows

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

Note: Novell Netware is no longer supported as a platform for running NetHASP authorization. License Manager must run on a Windows platform. The version on

the CD is not fully supported on Windows Vista

NetHASP timeout

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

Documentation and Examples

Manuals

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

C:\Program Files\i2 TextChart 3\Resources*language*\Documentation.

The following manuals exist for *TextChart 3*:

| Document Title | Part Number |
|---|-------------|
| <i>Release Notes</i> | 1267 |
| <i>i2 TextChart 3 Quick Start Guide</i> | 1266 |
| <i>i2 TextChart 3 User Guide</i> | 1265 |
| <i>i2 TextChart 3 Designer User Guide</i> | 1226 |

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

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

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

CD:\i2 TextChart 3\Deployment\Documentation

Example material

In some examples in the user guides, the first thing the user is asked to do is open an existing workspace or template; in other examples the user is asked to add documents to a workspace. The example material is typically installed to:

C:\Documents and Settings*User Name*\Local Settings\Application Data\i2\i2 TextChart 3*language*\Example Material

Note: Example material is installed with both the *TextChart* and *TextChart Designer* user guides.

Online help

Comprehensive online help is available, providing complete reference information for both *TextChart 3* (including *iBase 5 Live*) and *TextChart 3 Designer*.

White papers

The following white papers are available from your supplier:

| White Paper Title | Part Number | On the CD? |
|---|-------------|------------|
| <i>i2 TextChart Product Overview White Paper</i> | 1389 | No |
| <i>i2 TextChart What's New White Paper</i> | 1436 | No |
| <i>Using i2 iBase 5 with i2 TextChart 3 White Paper</i> | 1304 | No |

Installation

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

Windows Terminal Services

If you are installing using Terminal Services then you must install using the Add or Remove Programs facility in the Control Panel. To complete the installation *TextChart* 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

Using Setup.exe

To install *TextChart 3*:

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

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

4. Follow the prompts to complete the installation.

The following shortcuts will be installed:

| | |
|--|---|
| i2 ► i2 TextChart 3 | Start <i>i2 TextChart</i> |
| i2 ► i2 TextChart 3 ► Documentation | Access the product documentation in PDF format. |

If *TextChart Designer* is installed using the complete or custom install paths, the following additional shortcut will be installed:

| | |
|-------------------------------------|------------------------------------|
| i2 ► i2 TextChart 3 Designer | Start <i>i2 TextChart Designer</i> |
|-------------------------------------|------------------------------------|

No shortcut is added if *iBase Live* is installed.

Note: Administrator privileges are required in order to install *i2 TextChart*.

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 *TextChart* 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 *TextChart* 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*.

Modification and uninstallation

Installing *TextChart* adds an entry to your Add or Remove Programs in the Control Panel.

You can use this entry to:

- Uninstall or change features of *TextChart*

Upgrade notes

TextChart 3 can be run as a stand-alone solution or it can be installed in parallel to *TextChart 2* so that both versions can run on the same machine. However, *TextChart 3* workspaces are not compatible with *TextChart 2*.

Note: If you are currently running *TextChart* v1.0.1, 1.0.5, or 1.1.55, you must uninstall it before installing *TextChart 3*. You should uninstall the previous version using Add or Remove Programs in the Control Panel.

Compatibility notes

Workspaces and templates created in previous versions of *TextChart* and *TextChart Designer* can be opened and used in version 3.0.1. *TextChart 3.0.1* however, is not able to save files in the format of older versions; once you have opened and overwritten a previous version of a workspace or template in version 3.0.1, you will not be able to reuse it with *TextChart 1* or *TextChart 2*.

TextChart 3 is compatible with the following i2 applications:

i2 Analyst's Notebook

TextChart 3 is compatible with *Analyst's Notebook 7*:

- *Analyst's Notebook 7* will open workspaces and templates created with *TextChart 3* and other earlier versions (v1.0.1, 1.0.5, 1.1.55 and 2.0.1).
- *TextChart 3 Designer* will open charts and templates (using New From) created with *Analyst's Notebook 7* and other earlier versions (v6.0.13 SR2 and 6.0.55).

Note: When installed on the same computer, *Analyst's Notebook* enables the Spelling Checker within *TextChart*.

i2 ChartReader

TextChart 3 is compatible with *ChartReader 7*:

- *ChartReader 7* will open workspaces created with *TextChart 3* and other earlier versions (v1.0.1, 1.0.5, 1.1.55 and 2.0.1).

i2 iBase

TextChart 3 is compatible with *iBase 5*:

- *iBase 5* will load workspaces and validate templates created with *TextChart 3* and other earlier versions (v1.0.1, 1.0.5, 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*.

Note: *TextChart* and *iBase* must be installed on the same machine if you want to use *iBase Live* to connect to an *iBase* database. *iBase* does not need to be installed on the same machine as *TextChart* if you use the visualization loader (as in previous releases).

i2 ChartExplorer

TextChart 3 is compatible with *ChartExplorer 2*:

- *ChartExplorer 2* will search and display charts created with *TextChart 3* and other earlier versions (v1.0.1, 1.0.5, 1.1.55 and 2.0.1).

You should contact i2 Support if you require more information on the above subjects.

Known Limitations

This section contains information on known limitations in version 3.0.1.

Microsoft Office 2007 document formatting (issue 3731)

Reported: 3.0.1

There are limitations to the level of support provided for Microsoft Office 2007 document formats. Autonomy HTML Export does not preserve formatting which means that tables, paragraph styles, font styles and so on are removed from a Microsoft Office 2007 document when it is added to *TextChart*.

A suggested workaround when using Microsoft Office 2007 is to save the document in RTF or Microsoft Word 2003 format before adding it to *TextChart*, thereby preserving the formatting of the document.

Date and time values in Microsoft Office 2007 Excel documents (issue 3855)

Reported: 3.0.1

Date and time values in Microsoft Office 2007 Excel documents are converted to numeric values when added to *TextChart* workspaces.

Undo operation has no effect on database changes (issue 3569)

Reported: 3.0.1

When using *iBase Live* from *TextChart*, selecting Undo will not reverse changes made to data in the database.

Microsoft Office Excel documents and fuzzy searching (issue 3297)

Reported: 3.0.1

Excel documents are not indexed correctly when added to *TextChart*. This means that the fuzzy search mechanisms used to populate the drop-down list of suggested values and locate matches in the Find dialog do not work correctly.

It is recommended that only non-fuzzy searches are performed on Excel documents. If a fuzzy search is required however, a suggested workaround is to paste the contents of the Excel document into a Word document before adding it to a *TextChart* workspace. The Paste command should be a simple paste rather than Word's Paste Special option. The appearance of documents created in this way may not reflect the original.

Running a query that returns very large numbers of matching records (issue 3916)

Reported: 3.0.1

Using the *iBase Live* Find or Add Record dialog to find more than 100000 records in a single query can cause an application error to occur. In this case, click **Continue** and run the search again using more stringent criteria that will reduce the number of matching records to less than 100000.

Querying records is slower in iBase Live than in iBase (issue 3915)

Reported: 3.0.1

With some types of search, using the *iBase Live* Find or Add Record dialog to query an *iBase* database may be slower than running an equivalent query directly in *iBase*.

Microsoft Vista known limitations

Reported: 3.0.1

TextChart 3 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 *TextChart* 3 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 *TextChart* are claimed to be supported on Vista by their suppliers. As they become available i2 will include supported versions of third party applications in future releases. Unless stated in the known issues below the third party components have not shown to cause issues.

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

TextChart 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.

Printing (issue 3868)

When operating on Windows Vista, printing from *TextChart* is significantly slower than when operating on other supported operating systems. Both the Print and Page Setup dialogs take longer to display.

Derived attribute value support

Reported: 2.0.1

Attribute values can be derived for many of the entity semantic types in the Semantic Type Library. Currently however, derivations are supported for the Bank Account, Credit Card, Person, Motorcycle and Motor Vehicle entity semantic types only. Derivations based on other entity semantic types have not been tested and therefore are not currently

supported by i2.

Attribute value derivation issues

Reported: 2.0.1

Incorrect or unexpected behavior may occur when deriving attribute values based on the following property semantic types:

- Vehicle License Plate Number - US license plates containing 4 digit numeric characters are not always recognized.
- Vehicle Model – where the vehicle model is comprised of letters and numbers such as Jaguar XK8, the full model name is not always recognized. In some circumstances, the model name may be mistaken for the vehicle license plate, for example when the text `Lincoln Grand Cherokee SRT8` is marked up.

Motorcycle vehicle models are not always recognized, for example `Honda Gold Wing`.

- Person Last Name – in some cases, last names are incorrectly recognized as first names and vice versa, for example if the text `CARTER Gary` is marked up instead of `Gary CARTER`.

When marking up hyphenated last names, the first part of the name is recognized as a middle name. For example, when marking up `Debbie SMITH-CARTER`, `CARTER` is derived as a last name and `SMITH` is derived as a middle name.

If a name is not recognized, it will not be derived as a last name even when it follows a person title, for example when marking up the text `Mr BLOGGS`.

- Person Suffix - MBE is not recognized as a person suffix. For example, when marking up `Peter INGRAM MBE`, `INGRAM` is derived as a middle name and `MBE` is incorrectly derived as a last name.
- Account Routing Number - UK Building Society roll numbers are not always recognized.

PDF documents created from an OCR process (issue 2896)

Reported: 2.0.1

Some OCR tools will create PDFs that consist only of a series of images (TIFFs) comprising the pages of the processed document. When such a PDF is added to *TextChart*, it is displayed as a blank document in the Document Pane; this is because pictures contained within PDF documents are not imported during the conversion process.

A possible workaround is to convert the PDF before adding it to *TextChart*, using a tool that converts PDF content to Microsoft Word or text.

Ghost markups (issue 2761)

Reported: 2.0.1

It is sometimes possible for the text in a document to remain highlighted when a markup is deleted, as if the deletion had not taken place. This occurs when the conversion to HTML from the original document format results in badly formed tags which prevent the removal of highlight colour tags.

While this situation should rarely occur, there is a potential workaround; by creating a markup that extends slightly beyond the start and end of the ghost markup, then deleting it.

OpenOffice document formatting (issue 2874)

Reported: 2.0.1

There are limitations to the level of support provided for OpenOffice/StarOffice 1.0 document formats. Autonomy HTML Export does not preserve formatting which means that tables, paragraph styles, font styles and so on are removed from an OpenOffice document when it is added to *TextChart*.

A possible workaround when using OpenOffice/StarOffice is to save the document in RTF or Microsoft Word format before adding it to *TextChart*, thereby preserving the formatting of the document.

Multiple derived values on Apply New Template (issue 2916)

Reported: 2.0.1

Derived values are generated at the point when an entity is created, meaning that an attribute slot will normally contain just one derived value. When a new template is applied to a template however, additional attribute values may be derived and added to slots which already contain derived values. This happens where both the original and new templates have derived values enabled, and an entity on the chart has an occurrence markup set as the label (not the original markup that was used to create the item). In this case, the Apply New Template process will generate new derived values from the selected occurrence markup. There is no loss of data, and the new derived values may be edited, set as the attribute value or deleted as required.

Pictures in PDF documents (issue 1463)

Reported: 1.0.5

Pictures contained in PDF documents are not imported and therefore are not displayed in the Document Pane.

Duplicating entity and link types in TextChart Designer (issue 1572)

Reported: 1.0.5

When designing templates in *TextChart Designer*, it is possible to duplicate the properties of existing entity and link types. However, any attribute slots that have been assigned to the existing entity or link type are not duplicated.

Document display

Reported: 1.0.1

HTML, PDF and other document types do not always convert or display properly within the Document Pane. The degree of fidelity to which the original format is preserved, and its subsequent usability in *TextChart*, is dependent upon the originating application, its version, and the complexity of the document content. This limitation may arise for example if your document has tables, pictures, special characters or different color text.

Text selection where text split across cells (issue 187)

Reported: 1.0.1

It is not currently possible to select text which is split across cells as a single unit for mark up purposes. Depending on the original document content, it may not be immediately

obvious that the converted text spans cells in a table.

Selecting higher document zoom levels (issue 235)

Reported: 1.0.1

Highlighting text at higher document zoom levels, for example 200%, is more difficult than if zoom level is set to a lower level, for example 100%. Recommendation is that zoom level for highlighting text is set to a lower level.

Combinations of foreground and background color do not appear to select correctly (issue 543)

Reported: 1.0.1

Applies to Windows 2000 or Windows XP running under Windows Classic Theme – certain combinations of foreground and background colors (for example, pink text on a white background) will not show correct selection, although the text has been selected correctly.

Printing of large documents (issue 828)

Reported: 1.0.1

Large documents can sometimes take a long time to be sent to the printer during which time the computer is at full capacity; this means *TextChart* may be unresponsive during this time.

Contacting i2

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

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

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

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

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