

InvestorPOS Publisher™ – Release Notes

April 2013

The following feature will be released to InvestorPOS Publisher™ the week of April 1, 2013.

Batch Processing of Documents

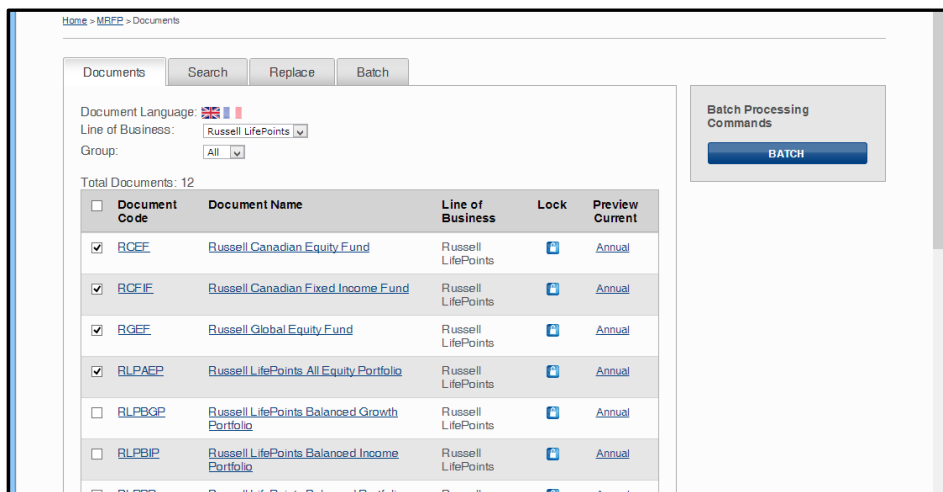
Documents can now be processed in batches within InvestorPOS Publisher. This new feature will allow you to combine multiple documents into one large PDF or create a ZIP file of several hundred individual PDFs within minutes. You can also select many documents at one time and have a blackline document created for each and inserted into the PDF output.

An Overview of Batch Processing

Enter the document list screen for any type of document.

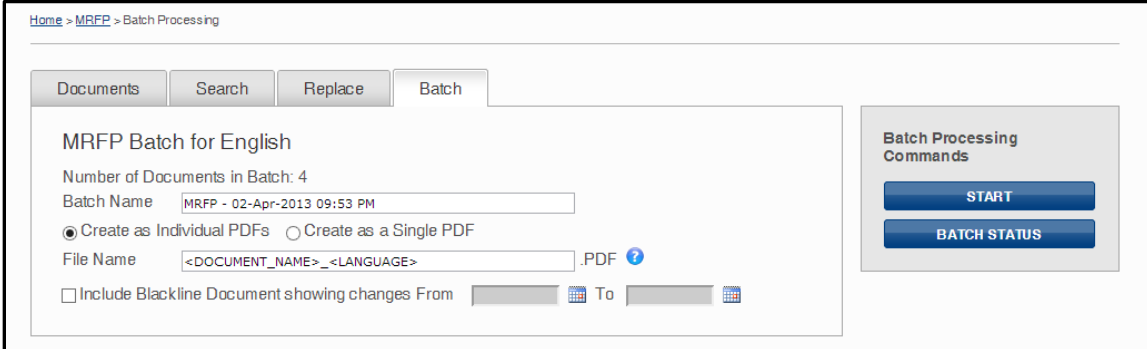
New features on the document list screen include the addition of document language selection that will allow users to select which language they want to view all documents in, rather than selecting a different language, one document at a time. To start the batch process you first need to select the documents to include for processing. A document selection checkbox has been added for this purpose. Selecting the checkbox in the header will select all documents on that page. As you select different documents that may span several list pages, selections between document list pages will be remembered by the application as long as you stay within the document list screen. Leaving the document list screen will remove the selections made.

Figure 1: Document List Screen with Four Documents Selected for Batch Processing



After selecting all the desired documents for processing, select the “Batch” button to the right. Upon selecting the “Batch” button you are taken to the batch processing input screen. Here is where you specify the details for how the batch is processed.

Figure 2: Batch Processing Input Screen



The title of this page will specify what type of documents have been requested for batch processing and in what language. In this example English MRFP documents will be processed.

Number of Documents in Batch: this is the total number of all the documents selected.

Batch Name: a predefined name is inserted here for the batch, but you can specify any name you’d like.

Create as Individual PDFs or Create as a Single PDF: selecting one or the other of these radio buttons allows you to create a ZIP file containing all of the selected documents as individual, separate PDFs or a ZIP file containing one single PDF where each document comes after the other.

File Name: when creating as individual PDFs, the system will allow you to name each PDF file within the ZIP file, based on a set of predefined values. (Select the “?” to see the predefined value options.) The user can name the files in a package when the package contains individual files. If the user requests a single, stacked PDF, then the filename is set automatically by the system. This feature is inactive when creating a single PDF.

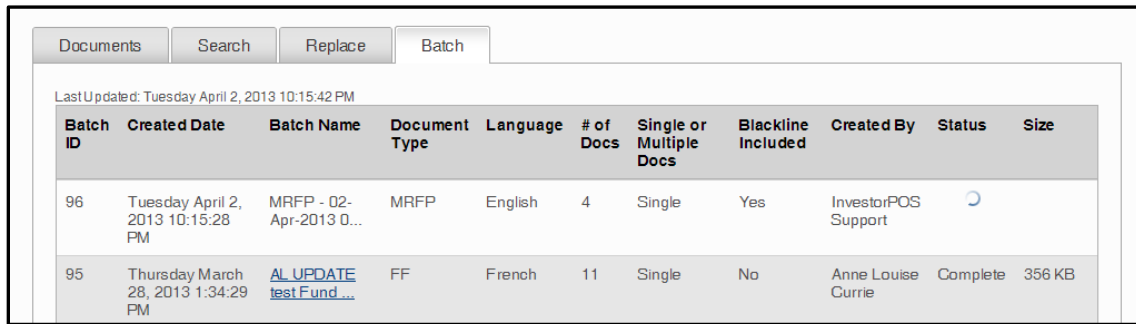
Include Blackline Document Showing Changes: this option allows you to insert a blackline mark-up document after the current version of the document within the PDF output file. Select the checkbox to include the blackline document. After selecting to include the blackline document, select the date “From” which to start referencing changes to the document and the date up “To” reference changes. All changes that have been made between these two periods will be highlighted in the Blackline Document.


Once all the options have been completed select “Start” to queue the batch for processing.

If you want to review the status of all batches, select the “Batch Status” button.

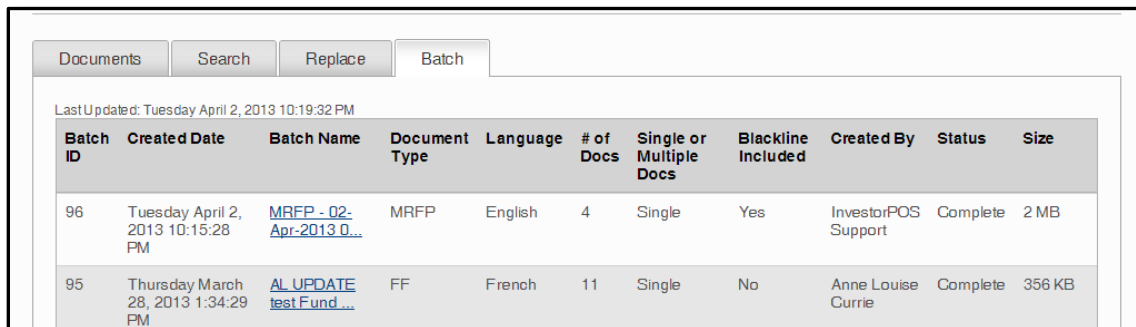
The application will show the batch status screen after selecting “Start”. While the batch is being processed, a progress indicator will be displayed in the “Status” column.

Figures 3 and 4: Batch Status Screens



Batch ID	Created Date	Batch Name	Document Type	Language	# of Docs	Single or Multiple Docs	Blackline Included	Created By	Status	Size
96	Tuesday April 2, 2013 10:15:28 PM	MRFP - 02-Apr-2013 0...	MRFP	English	4	Single	Yes	InvestorPOS Support		
95	Thursday March 28, 2013 1:34:29 PM	AL_UPDATE test Fund ...	FF	French	11	Single	No	Anne Louise Currie	Complete	356 KB

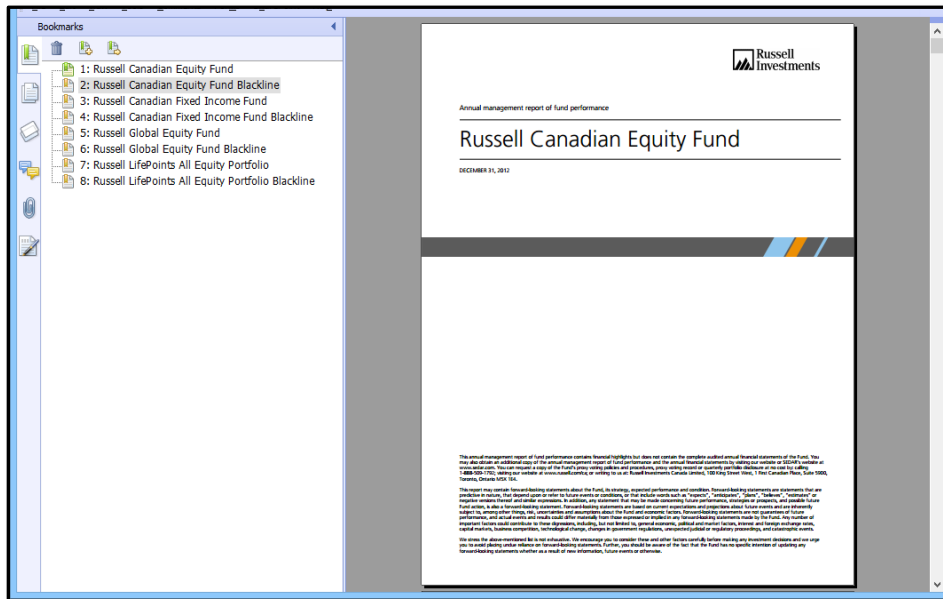
Upon completion, the value in the “Status” column will change to “Complete”, the Batch Name will change to a hyperlink and the size of the completed ZIP file package will be displayed. This batch process generally takes between a few seconds and a few minutes, depending on the number of documents being compiled. Clicking on the Batch Name will download the ZIP file.



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96	Tuesday April 2, 2013 10:15:28 PM	MRFP - 02-Apr-2013 0...	MRFP	English	4	Single	Yes	InvestorPOS Support	Complete	2 MB
95	Thursday March 28, 2013 1:34:29 PM	AL_UPDATE test Fund ...	FF	French	11	Single	No	Anne Louise Currie	Complete	356 KB

The PDF within the ZIP file contains all documents requested as well as the Blackline Document for each. All have been bookmarked within the PDF for quick reference.

Figure 5: Document Bookmarking within PDF



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