

InvestorPOS Publisher™ – Release Notes

January 2013

The following feature will be released to InvestorPOS Publisher™ the week of Jan. 28, 2013.

Blackline Document Creation

Blackline documents are used to graphically show content changes that have been made to a document between two given dates. In addition to being able to review changes at the field level, using the History > Compare function InvestorPOS Publisher now supports blackline document creation at the document level. This means that you can now review all of the changes that have been made within a document for a given time period.

How Updates are Presented Within the Blackline Document

Within the blackline document, any content that has been added to the document over the time period requested will be presented in red. Content that has been deleted will be shown with strikethrough and in blue. Where chart content has been updated, the old chart will appear above the new one with an “x” over top of the chart.

The following is an example to illustrate how changes are represented in the blackline document based on content updates to three different fields (“Field A”, “Field B” and “Field C”) made over a period of approximately one month (Dec 20 to Jan 15).

Field	December 20	January 3	January 7	January 10	January 15
Field A	Update A1	Update A2		Update A3	
Field B			Update B1	Update B2	
Field C	Update C1	Update C2			

In the first scenario, the user has requested a report from January 3rd to January 15th. All three fields have been updated over this time period at different times.

The blackline document for January 15th will show changes to:

- The value of “Field A” on January 3rd compared to the value on January 10th (i.e. “Update A2” compared to “Update A3”). “Update A2” will be struck-through and shown in blue and “Update A3” will be shown in red.

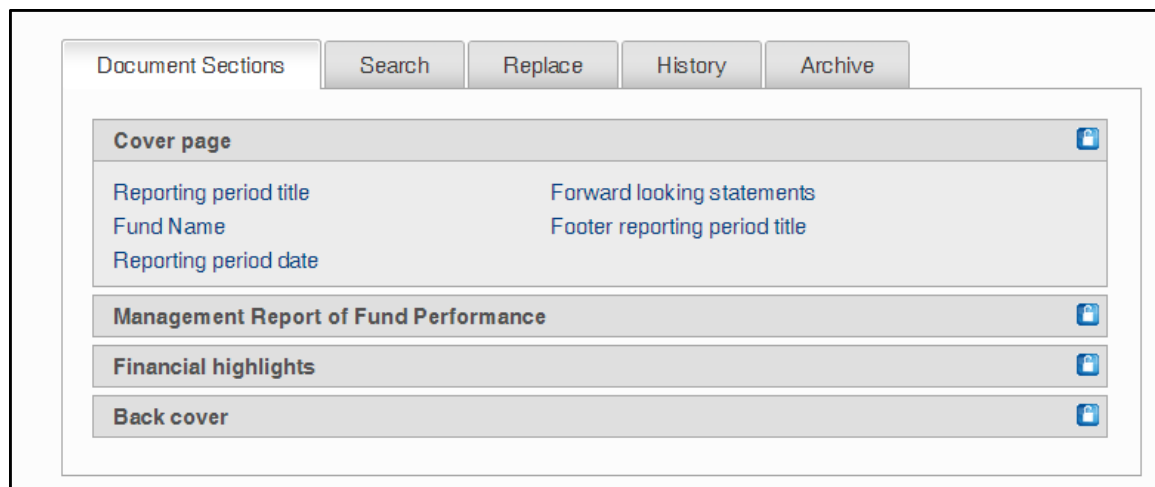
- The value of “Field B” on January 7th compared to the value on January 10th (i.e. “Update B1” compared to “Update B2”). “Update B1” will be struck-through and shown in blue and “Update B2” will be shown in red.
- The value of “Field A” and Field C” on December 20th will not be shown in the blackline as they are outside the requested reporting period of Jan. 3 to Jan. 15.
- The value of “Field C” on January 3rd will be shown in the blackline document as not being edited (in normal black text) as it has not been updated between Jan. 3 and Jan. 15.

For “Field A”, if the content that was changed in “Update A2” was the same content that was changed in “Update A3” the changes from “Update A2” will be shown in blue and struck-through, whereas the content changes for “Update A3” will be shown in red.

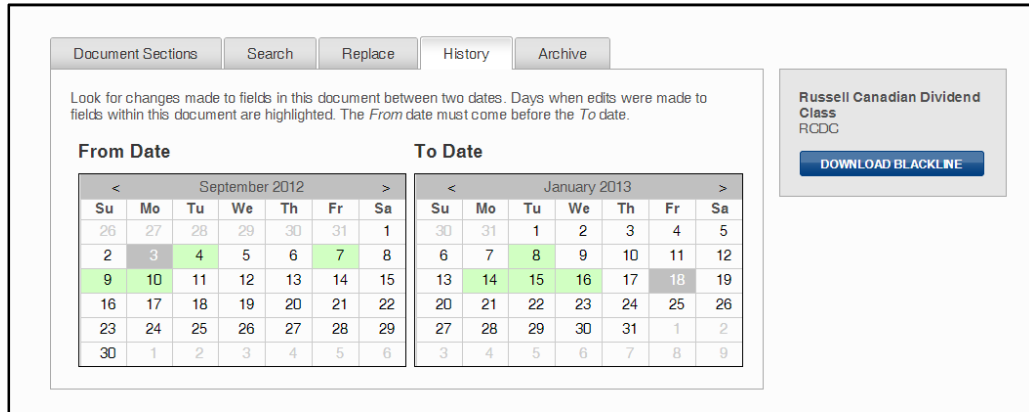
Creating a Blackline Document

A blackline document can be created for any document type¹. Log into InvestorPOS Publisher and select the document for which you want to generate a blackline document. In this example we’ll generate a blackline document for an MRFP document.

Within the document sections view, select the tab titled “History”.



Within the “History” tab use the calendar on the left to select the “from Date”, the baseline date from

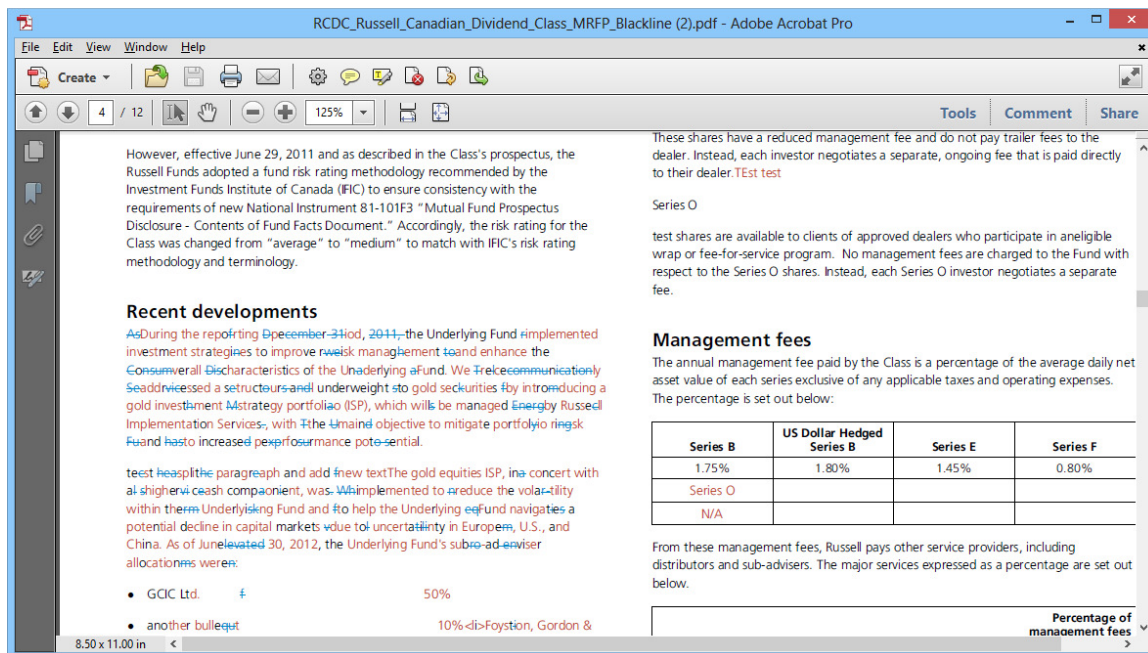


which you want to see all changes going forward. From the calendar on the right select the “To Date”, the day where you want to see all changes

before this date. After these dates have been specified select the “Download Blackline” button.

Dates that are shown in green represent dates where fields within the document have been updated. To see the number of fields that have been updated on a specific date holding your mouse over the green date field. Dates that are shown in grey are the “From Date” and the “To Date” that you have specified.

The blackline document will be presented in Acrobat Reader.



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