

## Aequos Engage Release Note Version 2.0.0.0

### General

No	Description	Benefit
1	Removal of ActiveX browser control, MSXML dependency, HTTPXML ActiveX control dependency.	This enhancement reduces the permission required for install as well as the reducing the size of the download.
2	Update mechanism replaced with .NET smart client deployment mechanism.	This allows seamless updates to the system in a similar style to web site deployments. Future updates can be done incrementally removing the need to download the whole set up file for each release.
3	File upload enhancements.	Uploads such as Reports and Quote Documents are now significantly faster.
4	Exporting and Reporting functionality enhancements.	Engage is no longer dependant on Microsoft Office for generating reports and exporting content. This also means much faster report generation.
5	Addition of Print Functionality	The option to print directly as an alternative to exporting documents has been implemented across the system.
6	Addition of Advanced Configuration Screen (within the 'Settings' tab).	This allows users the flexibility to change caching and compression settings to increase system performance and also to change locations for the saving of reports.

### Administration

No	Description	Benefit
1	Added the selection of default report sections to a product type template.	Report sections can now be added within the administration area as a default.
2	Added name filter on user tab.	Administrators are now able to search the list of users within their organisation via this new functionality.
3	Report sections, report text and Provider selection	This enhancement

	functionality.	allows licence administrators to set report sections provider list, and report text as default licence wide.
4	Product specific research templates.	Licence administrators are now able to select specific products to a research template for building panels.
5	Fund selection within a research template.	This enhancement allows licence administrators to highlight specific funds against a research template.

### Login

No	Description	Benefit
1	Password Reminder.	A password reminder facility has been implemented within the login screen.
2	Addition of Proxy Server functionality.	It is now possible to set a proxy server domain, server, username and password to allow Engage to traverse proxy servers.

### Client details

No	Description	Benefit
1	Ability to save and restart individual product type research sessions. This includes saving any associated quotes.	Users are now able to save their research mid-session and restart at a later date. Additionally, any quote details obtained will be stored as well.

### Sift Selection

No	Description	Benefit
1	Sift summary screen enhancements.	When the sift summary screen is exported, manually added products are now correctly highlighted in blue

### Product Selection

No	Description	Benefit
1	Addition of Equity Release data	Users are now able to research Equity Release products within

		Aequos Engage.
2	Corrected the nested sort ordering on the product selection screen.	Products within the product selection screen will now appear in DNA score order and alphabetically.

### Graphing

No	Description	Benefit
1	Replaced the existing ActiveX graph control with .NET graph control.	This results in a reduction of the permissions required for install and additionally, reduces the overall size of the download.
2	Fixed graphing error in research report	Where reduced graphing is selected (not the whole matching product list), only the products selected will appear in the graph within the research report.

### Fund Compare

No	Description	Benefit
1	Fund grid columns can now be reduced in size as well as made bigger.	Users now have the ability to customise the appearance of the table within the fund compare section.
2	Ability to graph against additional indices and include comparison graphs in research report	Users can now compare the performance of the funds against additional indices such as FTSE 100, for example. Additionally, these comparisons can be included in the research report.

### Quote Links

No	Description	Benefit
1	Added groups to the quote document list screen to help differentiate between different quote references.	Users will now be able to easily identify and select quotes retrieved from the portals.
2	Quote documents are now uploaded as part of the client session document storage; this means they can be retrieved by CRM providers who access Web Service 3.	This enables users of CRM systems to retrieve the quotes and store them in their client files.

## Reports

No	Description	Benefit
1	Fund fact sheets now correctly display the 'Defaqto QuantRater' column.	Defaqto QuantRater information is now accurately displayed within the fund fact sheet section of the research report.
2	Added benchmark description against selected sifts.	When a multi-select column is chosen on sift, the column now gets included in the sift selection description.
3	Enhanced reporting	It is now possible to include sift criteria reports, specific brochure/fund compare analysis, special offers and fund compare graphs as custom features in the research report.