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**S&P Global**

Market Intelligence

# Xpressfeed Loader Release Notes v5.x series

**Reliable data delivery and management**



## Client Support

<b>Email: <a href="mailto:support.datafeed.mi@spglobal.com">support.datafeed.mi@spglobal.com</a></b> <i>File delivery support is available 24/7/365</i>			
<b>U.S. / Canada / South America</b>	<b>Support:</b> 1.800.523.4534 or 1.303.721.4802	<b>China</b>	+86.10.6569.2985 8:00 a.m. – 5:00 p.m. local time Monday – Friday
<b>Mexico</b>	303.721.4802	<b>Japan</b>	+81.3.4550.8350 8:00 a.m. – 5:00 p.m. local time Monday – Friday
<b>Europe</b>	+44. 20.7176.8580	<b>South Korea</b>	+82.2.2022.2395 8:00 a.m. – 5:00 p.m. local time Monday – Friday

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# 2024-05 v5.10.3.83

## Corretto 8

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### ➤ Recent JRE version

Upgraded to the recent JRE version of Corretto 8.412.08.1 to include latest fixes for issues and common vulnerabilities.

## PC SFTP added as a source

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### ➤ PC SFTP as a source

The Xpressfeed Loader now successfully connects to PC SFTP as a source. More information will be coming soon on the new SFTP platform.

## Removing documentation (docs folder) from the installer

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### ➤ Removed the Docs folder

Removed the docs folder from the installer so that documentation may now be directly accessed from the Support Center.

## Additional Information

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### ➤ Handling Newline characters in PostgreSQL

Changed the way newline characters are processed in PostgreSQL to keep it consistent with the text files.

# 2024-01 v5.10.3.70

## Corretto 8

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### ➤ Recent JRE version

Upgraded to the recent JRE version of Corretto 8: 8.392.1

## Libraries

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### ➤ Updated libraries

From	To
ActiveMQ/activemq-broker-5.16.2	ActiveMQ/activemq-broker-5.16.7
ActiveMQ/activemq-client-5.16.2	ActiveMQ/activemq-client-5.16.7
ActiveMQ/activemq-jaas-5.16.2	ActiveMQ/activemq-jaas-5.16.7
c3p0/c3p0-0.9.5.2	c3p0/c3p0-0.9.5.5
c3p0/mchange-commons-java-0.2.11	c3p0/mchange-commons-java-0.2.20
gui/JCommon-1.0.16	gui/JCommon-1.0.24
gui/jfreechart-1.0.13	gui/jfreechart-1.5.4
Hibernate/classmate-1.3.0	Hibernate/classmate-1.6.0
Hibernate/dom4j-1.6.1	Hibernate/dom4j-2.1.4
Hibernate/jandex-2.0.3.Final	Hibernate/jandex-3.1.5.Final
Hibernate/javassist-3.20.0-GA	Hibernate/javassist-3.29.2-GA

From	To
Hibernate/jboss-logging-3.3.0.Final	Hibernate/jboss-logging-3.4.3.Final
	jung/colt-1.2.0.jar
	jung/concurrent-1.3.4.jar
	jung/j3d-core-1.3.1.jar
	jung/jung-3d-2.0.1.jar
	jung/jung-io-2.0.1.jar
	jung/jung-jai-2.0.1.jar
	jung/stax-api-1.0.1.jar
	jung/vecmath-1.3.1.jar
	jung/wstx-asl-3.2.6.jar
xml/xstream-1.4.19.jar	xml/xstream-1.4.20.jar
commons-codec-1.15.jar	commons-codec-1.16.jar
commons-daemon-1.3.2.jar	commons-daemon-1.3.4.jar
commons-dbcp2-2.9.0.jar	commons-dbcp2-2.11.jar
commons-io-2.11.0.jar	commons-io-2.15.jar
commons-lang3-3.12.0.jar	commons-lang3-3.13.jar
commons-pool2-2.11.1.jar	commons-pool2-2.12.0.jar
commons-text-1.10.0.jar	commons-text-1.11.jar
jaxen-1.1.1.jar	jaxen-2.0.0.jar
joda-time-2.12.0.jar	joda-time-2.12.5.jar
log4j-api-2.17.2.jar	log4j-api-2.22.jar
log4j-core-2.17.2.jar	log4j-core-2.22.0.jar
log4j-slf4j-impl-2.17.2.jar	log4j-slf4j-impl-2.22.jar
	reflections-0.10.2.jar
	xdb.jar

# 2023-06 v5.10.3.58

## *Install Software Files*

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### ➤ **Windows Server 2022**

Resolved install issues surrounding Windows Server 2022 by updating the install software files.

## *mail.jar*

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### ➤ **Latest version**

Replaced mail.jar with the latest version (1.6.2) of Java Mail libraries.

## *XStream Libraries*

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### ➤ **Java libraries**

Upgraded the XStream libraries.

## *JDBC Drivers*

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### ➤ **JDBC Drivers**

Upgraded to the JDBC Drivers for Microsoft SQL Server, Oracle, PostgreSQL, and MySQL.

## *Corretto 8*

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### ➤ **Recent JRE version**

Upgraded to the recent JRE version (1.8.0\_352) of Corretto 8.

## *List of Impacted Libraries*

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### ➤ **Upgraded, added, or removed libraries**

from	to
mssql-jdbc_auth-9.2.1.x64.dll	mssql-jdbc_auth-11.2.1.x64.dll
xpp3-min-1.1.4c.jar	xpp3-1.1.6.jar
xstream-1.3.1.jar	xstream-1.4.19.jar
commons-codec-1.4.jar	commons-codec-1.15.jar
commons-collections-3.1.jar	commons-collections4-4.4.jar
commons-daemon-1.0.15.jar	commons-daemon-1.3.2.jar
commons-dbcp2-2.1.1.jar	commons-dbcp2-2.9.0.jar
commons-io-2.4.0.jar	commons-io-2.11.0.jar
commons-lang-2.5.jar	commons-lang3-3.12.0.jar
commons-logging-1.0.4.jar	commons-logging-1.2.jar
commons-pool2-2.4.2.jar	commons-pool2-2.11.1.jar
hamcrest-core-1.3.jar	hamcrest-2.2.jar
joda-time-2.2.jar	joda-time-2.12.0.jar
log4j-api-2.17.1.jar	log4j-api-2.17.2.jar
log4j-core-2.17.1.jar	log4j-core-2.17.2.jar

from	to
log4j-slf4j-impl-2.17.1.jar	log4j-slf4j-impl-2.17.2.jar
mssql-jdbc-9.2.1.jre8.jar	mssql-jdbc-11.2.1.jre8.jar
mysql-connector-java-8.0.25.jar	mysql-connector-j-8.0.31.jar
postgresql-42.2.22.jar	postgresql-42.5.0.jar
quartz-all-2.0.1.jar	quartz-2.3.2.jar
freemarker.jar	reflections-0.10.2.jar
slf4j-api-1.7.32.jar	slf4j-api-1.7.36.jar
Mail.jar	javax.mail-1.6.2
hamcrest-core-1.3.jar	hamcrest-2.2.jar
joda-time-2.2.jar	joda-time-2.12.0.jar
log4j-api-2.17.1.jar	log4j-api-2.17.2.jar
log4j-core-2.17.1.jar	log4j-core-2.17.2.jar
log4j-slf4j-impl-2.17.1.jar	log4j-slf4j-impl-2.17.2.jar
mssql-jdbc-9.2.1.jre8.jar	mssql-jdbc-11.2.1.jre8.jar
mysql-connector-java-8.0.25.jar	mysql-connector-j-8.0.31.jar
postgresql-42.2.22.jar	postgresql-42.5.0.jar
quartz-all-2.0.1.jar	quartz-2.3.2.jar
freemarker.jar	reflections-0.10.2.jar
slf4j-api-1.7.32.jar	slf4j-api-1.7.36.jar
Mail.jar	javax.mail-1.6.2

- **Library added:** commons-text-1.10.0.jar
- **Library removed:** freemarker.jar

## 2022-01 v5.10.3.45

### *Remote Execution (RCE) Risk CVE-2021-44228*

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➤ **log4j software library**

Xpressfeed Loader version 5.10.3.45 includes the latest log4j library to address common vulnerabilities and exposures discovered in log4j version range 2.0 - 2.17.0.

Please note the Xpressfeed Loader is not a publicly exposed web-based application and all vulnerabilities discovered in 2021 have been remediated with the latest update.



# 2021-08 v5.10.3.36

## *EDT FTP Libraries*

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### ➤ **Latest version**

Upgraded to the latest version 7.1.0 of EDT FTP libraries.

## *JDBC Drivers*

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### ➤ **Latest JDBC Drivers**

Upgraded to the latest JDBC Drivers for Microsoft SQL Server (9.2.1), Oracle (21.1), PostgreSQL (42.2.22), and MySQL (8.0.25) to better support the latest versions of the RDBMS, namely SQL Server 2019, Oracle 19c, PostgreSQL 13, and MySQL 8.0.

## *Corretto 8*

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### ➤ **Latest JDK version of Corretto 8**

Upgraded to the latest JDK version of Corretto 8 – jdk1.8.0\_292.

## *Other Enhancements*

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### ➤ **Stronger Loader performance**

We are now creating an index on the *actualzipfileid* column of the xfu\_actionStep table to strengthen the Loader's control database purge performance.

# 2021-02 v5.10.3

## *EDT FTP Libraries*

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➤ **Support for GCM cipher suite**

The latest EDT FTP libraries support the Galois Counter Mode (GCM) cipher suite for a more secure file transfer over TLS

➤ **SFTP client upgrade**

This enhancement improves Secure FTP performance over SSH.

## *JDBC Drivers*

---

➤ **Latest JDBC Drivers**

We upgraded to the latest JDBC Drivers for Microsoft SQL Server, Oracle, PostgreSQL, and MySQL to better support the latest versions of the RDBMS, namely SQL Server 2019, Oracle 19c, PostgreSQL 13, and MySQL 8.0.

## *Corretto 8*

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➤ **Latest JDK version of Corretto 8**

We upgraded to the latest JDK version of Corretto 8 – jdk1.8.0\_265.

## *Support Center URL*

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➤ **New Support Center URL**

The Support Center URL has been updated.

## *Other Enhancements*

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➤ **Stronger Loader performance**

We strengthened Loader performance by implementing the following enhancements:

- updated purge statement for xfu\_actualzipfile table
- effective handling of datetimes during spring forward period of DST
- notifications to avoid information for manually disabled tables
- processing FC updates in the presence of an unreachable target
- managing connections between Engine & Standalone user interface operating in different time zones

# 2020-02 v5.10.2

## *Amazon Corretto JRE*

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➤ **Xpressfeed Loader application moved to Amazon’s open version of Java**

We replaced Oracle Java with Amazon Corretto. Amazon Corretto is production-ready distribution of OpenJDK. This action is in response to the announcement by Oracle that Java SE public updates would no longer be available for business, commercial, or production use without a commercial license.

## *InstallAnywhere 2020*

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➤ **Xpressfeed Loader adopts latest version of InstallAnywhere**

InstallAnywhere 2020 supports Amazon Corretto JRE. In addition, it resolved installer issues encountered with the latest versions of CentOS Linux Server.

## *Garbage Collection Logging Removed*

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➤ **Streamlined Logging**

The Xpressfeed Loader will no longer create a separate Garbage Collector Log File within the Loader Installation directory.

## *Duplicate Records Handled in a Temporary Table*

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➤ **Enhanced user experience**

The Xpressfeed Loader now loads change files without creating duplicate records in the temporary table during attempted retries.

## *MySQL – Validate lower\_case\_table\_names setting*

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➤ **Control/Target setup validation**

The MySQL database variable **lower\_case\_table\_names** has been validated for value “1,” along with other variables for configuring the MySQL control/target databases.

## *Download SSL certificate using Proxy*

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➤ **FTPS connection mode with Proxy**

The Xpressfeed Loader now successfully connects to the FTP source using FTPS connection mode through a proxy. This change allows usage of proxy details to download SSL certificate, required for establishing FTPS connection.

# 2019-07 v5.10.1

## *Support for MySQL*

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➤ **Our second open source database**

We now support MySQL 8.0.

With this enhancement, you can enjoy a second open-source alternative database management system with all the standard SQL constructs and features of a commercial database.

## *Batch Delete for SQL Server*

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➤ **Breaking delete operations into smaller chunks for large change files**

With this enhancement, the processing of a change file with a large transaction volume will be broken into smaller chunks vs. a single transaction.

## *Source Tab > Connection Mode > SFTP Public Key*

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➤ **Key Based Authentication**

This enhancement provides an alternative to password authentication and is relatively more secure by avoiding the transmission of a password.

## *GUI Application > Window Title Bar*

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➤ **Xpressfeed Loader version number**

For quick reference, the Xpressfeed Loader version number now appears on the window title bar of the GUI Application.

## *Target Health Check Tab Removed*

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➤ **Database administrators better at keeping your target database at optimal health**

Your experienced database administrators are in a position to better analyze the health of your target database, such as database log and disk space usage, tables not analyzed, or tables not recently analyzed that may contain stale statistics.

## *Support for PostgreSQL*

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### ➤ **First-time support of open source database**

We now support PostgreSQL 9.4 or higher on two major operating systems: Windows and Linux.

With this enhancement, you can enjoy a cost-effective alternative database with all the standard SQL constructs and features of a commercial database.

## *New utility for Oracle and SQL Server to help with queue management: Command-line interpreter (cli)*

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### ➤ **cli.exe replaces dc.exe**

This utility is able to clean up queues when you encounter a messaging backup.

## *New Load mechanism for SQL Server*

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### ➤ **Moving to Bulk Copy from Bulk Insert**

#### ***Bulk Copy***

If you are using Microsoft SQL Server as a Target, we no longer require that you share the downloads folder during the initial Loader set up.

This new load mechanism is a push technology that makes the setup much easier. In addition, it significantly reduces the space requirements.

## *Email Tab > Account Type > Secure SMTP TLS / Secure SMTP SSL*

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### ➤ **Secure SMTP server with SSL and TLS encryption protocols**

We now support Simple Mail Transfer (SMTP) with Secure Sockets Layer (SSL) and Transport Layer Security (TLS) protocols. This enhancement provides a security layer to SMTP by transparently encrypting the message transmission from one email server to another.

## *Sources Tab > Connection Mode > FTPS*

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### ➤ **FTPS – New protocol for secure FTP transfers**

This enhancement enables us to offer a high level of protection since FTPS implements strong algorithms to encrypt any data transferred. You are now able to choose between SFTP and FTPS for secure transferring of Xpressfeed content.

## *Permission Change for PostgreSQL control database login for the Xpressfeed Loader Application*

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### ➤ **Superuser role in PostgreSQL database**

It is no longer required for the Superuser role to be granted to the Xpressfeed Loader Application when creating the PostgreSQL Xpressfeed control database.

## *Database queuing no longer used for Microsoft SQL and Oracle*

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➤ **ActiveMQ**

Moved to ActiveMQ in the Loader Engine and removed Native Database Queuing System

## *Adjustments*

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➤ **Unquoted path causing problems**

The path used for the Loader service will now be fully quoted to alleviate security concerns.

➤ **Proxy Tab > FTP Tab > Format**

We made an adjustment to correct an issue with CUSTOM proxy use. On occasion, there were problems using the custom proxy settings and we have made internal adjustments to alleviate this issue.

➤ **Targets Tab > Windows Authentication / Custom Connection String**

We removed the field Bulk Load Path.

➤ **Feed Config (FC) rewrite**

Upgraded the way the control database is updated with every new FC.

## Adjustments

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### ➤ **Sporadic Excessive FTP Connections**

An adjustment was made to clean up excessive connections to the FTP server. (This was not a widespread problem.)

### ➤ **SQL Server SSL Issue**

An adjustment was made to alleviate a SQL Server SSL connection issue. The latest Microsoft SQL Server JDBC jar is now being used to remedy this situation.

### ➤ **Unable to Delete a Package When Change Tracking Is Enabled for a Long Time**

An adjustment was made to resolve an Oracle target problem that was preventing a package from being deleted when Change Tracking was enabled for a long period of time.

**Please note:** If you have a problem deleting a package while Change Tracking is enabled for a long period of time, you must upgrade to Loader version 5.8.1 or above.

### ➤ **Temp Folder Service Access**

An adjustment was made so that you will only have to change the permissions in the Loader install area now. This occurred only when you changed the account that runs the Service after installing the Loader.

### ➤ **Queue Table Name Limitation in Oracle**

An adjustment was made to ensure that the Loader properly configures queuing resources by adhering to the Oracle limitation of allowing a queue table name of 24 characters or less.

### ➤ **Stored Procedure Resulting in Excessive SQL Server Logging**

An adjustment was made to the Loader stored procedures to prevent the Loader from growing the SQL log unnecessarily.

### ➤ **Connection Pooling Issue in Oracle**

An adjustment was made to ensure that the Loader uses the connection pool more effectively. This adjustment results in much less activity in the Oracle listener.

### ➤ **Selective Delete Restart Issue**

An adjustment was made to resolve a problem that kept a failed selective delete from being restarted.

### ➤ **Failed Feed Configuration Load**

A change was made that allows the Loader to load the feed configuration (FC) file even when all target databases are not reachable.

### ➤ **Rebranding**

Adjusted graphics throughout the application to match the S&P Global Market Intelligence brand.

## *Upgrade Java Version in Loader*

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### ➤ **From Java 7 to Java 8**

We upgraded from Java 7.79, which was the latest build of the Java Platform Standard Edition (Java SE) 7, to Java SE 8.74, which is the latest version of Java. With this enhancement, you will no longer need to enable 'Desktop Experience' in order to see Activity Details.

## *Package Disablement Changes*

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### ➤ **How/why a package is disabled**

This enhancement introduced changes to help you better determine the reason(s) when a package is automatically disabled.

#### **Disablement scenarios and enhancements:**

- 1. Package is disabled manually:** When disabling packages/tables from GUI > Load Plan > Context Menu.
  - 'Latest Status' column displays "Manually Disabled."
- 2. Package is disabled automatically:** When a package is present on the Load Plan and removed from the Source.
  - 'Latest Status' column changed to "Disabled | Package not available on Source" (from "Disabled | Not Subscribed").
  - Until the file search engine (FileWatcher) finds these files again, the only available Context Menu options are:
    - 'Change Source' (package-level), if the package is available on other Sources
    - 'Delete' (package-level)
    - 'View Detail' (table- and package-level)
- 3. Package is disabled automatically:** When a package is present on the Load Plan and past its dead date. (Dead date indicates when a package will no longer be available on Source.)
  - The only available Context Menu options are:
    - 'Change Source' (package-level)
    - 'Delete' (package-level)
    - 'View Details' (table- and package-level).
- 4. Package is disabled automatically:** When a GAP or missing files error is encountered.
  - The packages or tables shall no longer be disabled in such situations. We will continue to show all errors we currently show.

## *Load vs. Reload*

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### ➤ **Differentiate between Load and Reload options**

This enhancement provides further differentiation between the options of 'Load' and 'Reload' to help prevent you from accidentally performing a Reload instead of a Load.

In particular:




## Context Menu

- The icon for the 'Reload' option has been changed (in an attempt to make it more distinguishable).
- The warning pop-up message that appears when you click on the 'Reload' option (Continue with Delete and Reload of data? dialog) will change, accordingly, when:
  - More than Load Subscription is selected
  - One table is selected
  - More than one table is selected
- Option 'Reload' has been moved above the 'Delete' option (from its previous position below 'Load').

**GUI navigation:** GUI > Load Plan > Context Menu

## Access Application Menu

- The icon for the 'Reload All' option has been changed to  (in an attempt to make it more distinguishable).
- The warning pop-up message that appears when you click on the 'Reload All' option (Continue with Delete and Reload of data? dialog) has been changed.
- Option 'Reload All' has been moved above the 'Delete All' option.

**GUI navigation:** GUI > Access Application Menu

## Prompt Asks You to Enter Feed Config Update Time

### ➤ **Adjust the Feed Config Update Time to a time more convenient for your location**

In the interest of a more optimal Loader experience, a prompt urges you to adjust the Feed Config Update Time preferably to a time when there are no loads running. The prompt appears during an initial set-up as well as during an upgrade:

#### **During an initial set-up:**

- After you configure the Sources and Targets, as well as after the Load Plan view is launched, during:
  - Bundled Engine/GUI installation
  - Standalone GUI installation
  - Command Line installation

#### **During an upgrade:**

- Right after the Load Plan view is launched.

**Note:** You may also change your preference at any time from Settings > Miscellaneous tab.

## Updated 'Contact Client Support' messages

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### ➤ Greater specificity to the 'Contact Client Support' messages

To ensure that our 'Contact Client Support' messages provide correct information and report an issue more accurately, we reviewed and updated the messages as required.

## Redesign 'Drop Tables' / 'Delete'

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### ➤ Redesigned 'Drop Tables'

- An adjustment was made to the 'Drop Tables' functionality to ensure that tables are actually dropped from all Load Subscriptions that share the tables every time you use the Drop. This eliminates the occasional predicament when the 'Drop Tables' functionality deleted the data from shared tables as opposed to dropping the shared tables.

### ➤ Changed the confirmation dialog for 'Drop Tables' (package-level and table-level)

For ease of use and readability,

- Added the 'OK' button.
- Removed the 'Delete Data' button.
- Removed the 'Disable Load Subscription Table(s)' button.
- Changed the text in the confirmation dialog.

### ➤ Changed the confirmation dialog for 'Delete' (package-level / Latest Status Delete icon pop-up)

For ease of use and readability,

- Renamed the 'Delete Data and Subscription(s)' button to 'OK.'
- Removed the 'Disable Load Subscription(s)' button.
- Changed the text in the confirmation dialog.

**GUI navigation:** GUI > Load Plan > Context Menu

### ➤ Changed the confirmation dialog for 'Delete All' (package-level)

For ease of use and readability,

- Renamed the 'Delete Data and Subscription(s)' button to 'OK.'
- Removed the 'Disable Load Subscription(s)' button.
- Changed the text in the confirmation dialog.

**GUI navigation:** GUI > Access Application Menu

## 8.3 Path Name Convention

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### ➤ No longer necessary to enable 8.3 before or during a Windows Service install

You no longer need to enable Windows 8.3 path name convention when installing into a path with spaces. You can install directly with spaces in the default directory name.

## *Loader to Handle Feed Structure Changes*

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➤ **Dynamic feed changes**

This enhancement enables the Loader to handle dynamic feed structure changes (e.g., additional columns, text files, or tables to an existing feed).

## *Convert to Using UTF-8*

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➤ **Reading extended special characters the way they are produced**

This enhancement enables the Loader to read text files that are encoded with UTF-8 and load them properly into your database.

## ***Validation Checks Username and Database Schema on Oracle Database***

---

### ➤ **Ensure Database schema is the same as Username**

This enhancement prevents you from adding different values for Username and Database Schema when using Oracle database (Control setup tab, Target tab, and installation). For Control/Target database, the Database Schema field is non-editable and is auto-filled based on the Username value you enter when the Type selected is Oracle. For Command Line installation, you will no longer be prompted to enter Database Schema value for Control and Target databases; it is auto-filled based on the Username value you entered.

**GUI navigation:** Settings > Targets Tab > Username and Database Schema

## ***Provide for Future Expandability of Feeds***

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### ➤ **Determine file availability on your account via a web service**

This enhancement allows the Loader to explore the EDX FTP sources using HTTP web service call, instead of using FTP. This enhancement shortens the time required for the Loader to look for new files, a benefit that will be particularly appreciated as the volume of packages increases.

**GUI navigation:** Settings > Proxy Tab > HTTP

## ***Create/Maintain a View to Show Total Record Count and Current Through***

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### ➤ **Programmatically access values**

This enhancement enables you to programmatically access values that might be helpful in any downstream process. The values provided for querying include:

#### ***Total Record Count***

This value enables you to verify expected table counts for a package. This would allow for the programmatic checking the integrity of the database.

#### ***Current Through values of a table***

These values let you know the files through which the data has been loaded to your Load Subscription tables.

## ***Retain Change Tracking Data Only for a Limited Number of Days***

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### ➤ **Change tracking data purge control**

This enhancement provides you with a customizable option that enables you to purge old change tracking data automatically. With this enhancement, you can set the number of days for which the history of the change tracking data will be maintained.

## ***Warning notifications for errors during custom SQL statements***

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### ➤ **Warning notification emails**

This enhancement enables the Loader to send a Warning Summary Notification email that contains all the warnings that occurred during custom SQL statements (PreLoad Custom Task, PostLoad Custom Task, and Custom Table Index).

## *Upgrade Java version in Loader*

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➤ **Latest build in the Java 7 series**

We upgraded to Java 7.79, which is the latest build of the Java Platform Standard Edition (Java SE) 7.

## *Loader Application on Windows System / Database Server*

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➤ **Additional Operating System supported**

We now support Loader v5.7 on Windows 10 Operating System.

## *GUI Application > Load Plan > Options*

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### ➤ **Table-level loading**

This enhancement allows you to load one or more selected Load Subscription tables within the Load Subscription. As a result, you can load only the content you are interested in, which improves load times, especially for large packages. You can manually disable individual tables in a package and load only the content you want.

## *GUI Application > Target Health Check > Export Report*

---

### ➤ **Output the Target Health Check screen results to a file and print**

This enhancement enables you to export the Table Health Check results as a .pdf file and print the results. When clicking the Export Report button, an export window provides the capability to browse to a specific location, enter a file name, and save the report as a .pdf file.

## *GUI Application > Load Plan > Options > Total Records Validation*

---

### ➤ **Check for total number of records at the Load Sub-Level**

This enhancement enables you to specify the Check at the Load Subscription level (wherever applicable), instead of at the global setting in the Miscellaneous Tab where you were forced to either check for all applicable Load Subscriptions or none.

## *Settings > Miscellaneous Tab > Perform 'Total Records Validation' only after Load Subscription Loads*

---

### ➤ **Determining when to perform total records validation**

This enhancement provides the option of performing a total records validation after the last file of the Load Subscription loads, which enhances the performance of the Loader, especially when loading relatively large files. This option is an alternative to performing the default total records validation after each file within the Load Subscription loads.

## *Settings > Miscellaneous Tab > Check for New Data at Start of Load Job*

---

### ➤ **Check for new files at Load Subscription-level rather than at the entire Source**

This enhancement enables the function “Check for New Data at Start of Load Job” to only check for new files for the Load Subscription(s) in the Load Job as opposed to checking for new files in the entire Source at the beginning of the Load. This enhancement improves the chances of getting files faster, especially if the Source has a lot of original files to search for, and ensures that you do not miss any new files or Subscription(s).

## *Loading: Logging Enhancements*

---

### ➤ **Support for Loader installs**

These enhancements improve how we communicate problems.

- Added a tag for GUI settings on initial setup:

- We added a prefix tag - “Initial Loader Setup” for all setup Activity Details of the Source, Proxy, and Target until all initial Target(s) have been defined
- The tag “Initial Loader Setup” is inserted for Activity Detail Events upon initial configuration of the Source, Proxy and Target before Target initial setup configuration is completed.
- We added the prefix tag “Initial Loader Setup” for Activity Detail events on initial configuration of Source, Proxy, and Target for each Result Type: None, Success, Warn and Error
- Updated the popup messages during initial Loader startup with precise information that explains exactly what the issue is
- Explicit checking for permissions for the Control database connection

## **Non-Supported Character Sets**

---

### ➤ **Avoiding possible data corruption**

This enhancement enables the Loader to display a warning to Oracle database users who might attempt to use a character set other than the supported ones—AL32UTF8 or WE8MSWIN1252. When a non-supported character set is encountered, a confirmation dialog box displays the following warning: “Incorrect NLS\_CHARACTERSET detected. Allowed NLS\_CHARACTERSETs are [AL32UTF8, WE8MSWIN1252]. Proceeding could result in data corruption.”

## **Adjustments**

---

### ➤ **Not Dropping Tables: truncate vs. drop**

An adjustment was made to not perform a Drop on master tables and, instead, perform a Truncate followed by a Drop Index, during Load or Reload operations. The adjustment was implemented to ensure that clients do not have to re-assign privileges as would be the case when tables are dropped.

The adjustment ensures the drop is not performed during the following operations:

- Load operation
  - When the full-only package (packages with only full files) tables are loaded.
  - When you load a full-only package with a shared table but the other package(s) sharing the table is not loaded.
- Reload operation
  - When all the tables (regular and lookup), except for shared tables, are reloaded.
  - When all the currently loaded packages that share the table are being reloaded.

### ➤ **Resolve Possible Deadlocks**

An adjustment was made to resolve possible SQL Server deadlocks for Estimates packages.

### ➤ **Bringing the CPU down when it goes up with Update Control Data**

An adjustment was made to ensure that the CPU (Central Processing Unit) goes down after an upward movement when Control Data is updated.

➤ **Load Plan**

An adjustment was made to correct an issue when “Check for New Data at Start of Load Job” was selected and there was a failure it showed all of the Load Subscriptions that were part of the Load Job as failing instead of just the one(s) that failed.

➤ **Email Setup**

An adjustment was made to enable the Loader to start even when two email servers are marked as active.

➤ **Update Control Data failure notification**

An adjustment was made to notify you when the Update Control Data functionality fails to execute and to ensure that Load Jobs are not prevented from running when the Update Control data functionality fails.

➤ **Modifying Target settings in the GUI**

An adjustment was made to enable clients to modify the Target settings in the GUI if a problem happens while upgrading from v5.3 to v5.5 or above.



## Loader Application on Windows System

---

### ➤ Operating System (OS)

The Loader supports 64 bit Windows OS (compatible with JRE v1.7 or greater).

With this enhancement, the Xpressfeed Loader:

- Is able to utilize more available memory
- Has the ability to load large packages faster
- Allows for better management of the heap memory size

**Important!** If you are using a 32 bit Windows OS, it will need to be upgraded to 64 bit **before** upgrading to Xpressfeed Loader v5.5.

## Load Plan Tab > Options > Reprocess Change Files...

---

### ➤ Ability to reprocess change files

This enhancement allows you to reprocess change files. The option is available at the package level when one or more change files have already been loaded. You would use this feature to reprocess the change files if there are issues with the change files that were loaded.

## Load Plan Tab > Options > Table Partition

---

### ➤ Ability to create Table Partition

This enhancement enables you to define how tables should be partitioned. This feature speeds data retrieval for large tables. Table Partitioning is only available for clients that have Enterprise Licensing and is supported for both Microsoft SQL Server and Oracle database.

## Settings: Notifications

---

### ➤ Lower volume of email notifications

This enhancement will reduce the number of email notifications received with similar information.

- **Error or Warning Notification:**
  - When a warning or an error notification occurs more than one time during a load job, the initial warning or error will be sent and all others will be shown at the end of the Load Job Summary Notification.
- **FTP Connection issue:**
  - If no loading is occurring, the initial notification is sent; all others will be sent in intervals of once every 2 hours.
  - If loading is occurring, the initial notification is sent; all others will be shown at the end of the Load Job Summary Notification.

**Note:** For details on this and related changes, please contact your Datafeed Application Specialist.

## External Schedule Launcher

---

### ➤ Load/Reload Argument

This enhancement allows you to pass an additional (Optional) argument explicit to Load or Reload for the named Loader Schedule. You would use this additional optional argument if you wanted to perform a load or reload for a specified Schedule.

## Linux Command Line Loader Install

---

### ➤ Installing on Linux Operating System without X Windows

This enhancement enables you to run the Loader installer from a Terminal Window.

## Load Lookup Tables Transactionally

---

### ➤ Preserving the Table Definition and the Data in Lookup Tables

This enhancement ensures that, following the initial full load, reference tables will be loaded transactionally. For a reference table, the Loader loads its data content into a temporary table, compares the data in the temporary table with data in the master table, and, when differences are detected, makes a record-by-record change to the Master table and then drops the temp table.

The reference table is no longer dropped, recreated, and reloaded.

Here's the list of lookup tables:

tableName	tableName
ciqAddressType	Lookup
ciqAdvisorType	Lookup
ciqAfFactor	Lookup
ciqAfFactorRelative	Lookup
ciqAfStyle	Lookup
ciqAfUniverse	Lookup
ciqAlternateCompanyNameType	Lookup
ciqBankRegulatoryPeriodType	Lookup
ciqBusinessRelSourceType	Lookup
ciqBusinessRelType	Lookup
ciqCapStAsReportedClassType	Lookup
ciqCapStClassType	Lookup
ciqCapStCumulativeType	Lookup
ciqCapStDtAsRptdClassType	Lookup
ciqCapStDtClassType	Lookup
ciqCapStDtConvertibleType	Lookup
ciqCapStDtCumulativeType	Lookup
ciqCapStDtIntBenchmarkType	Lookup
ciqCapStDtIntRateType	Lookup
ciqCapStDtLevelType	Lookup
ciqCapStDtNonRecourseType	Lookup
ciqCapStDtParticipatingType	Lookup
ciqCapStDtRedeemableType	Lookup
ciqCapStDtSecuredType	Lookup
ciqCapStDtSubType	Lookup
ciqCapStDtType	Lookup
ciqCapStEqAuthrzdSharesType	Lookup

<b>tableName</b>	<b>tableTypeName</b>
ciqCapStEqConvertibleType	Lookup
ciqCapStEqSubType	Lookup
ciqCapStEqType	Lookup
ciqCapStEqVotingRightsType	Lookup
ciqCapStIntBenchmarkType	Lookup
ciqCapStInterestRateType	Lookup
ciqCapStIsConvertibleType	Lookup
ciqCapStIsSecuredType	Lookup
ciqCapStLevelType	Lookup
ciqCapStMaturityValueType	Lookup
ciqCapStNonRecourseType	Lookup
ciqCapStParticipateType	Lookup
ciqCapStRedeemableType	Lookup
ciqCapStSubType	Lookup
ciqCapStType	Lookup
ciqCharType	Lookup
ciqCharTypeToSubType	Lookup
ciqCommittee	Lookup
ciqCompanyRelType	Lookup
ciqCompanyStatusType	Lookup
ciqCompanyType	Lookup
ciqCompensationAdjustmentType	Lookup
ciqCompensationSubType	Lookup
ciqCompensationType	Lookup
ciqCompetitorSourceType	Lookup
ciqCountry	Lookup
ciqCountryGeo	Lookup
ciqCrossRefIdentifierType	Lookup
ciqCurrency	Lookup
ciqDataItem	Lookup
ciqDataItemBankRegulatory	Lookup
ciqDataItemConversionRule	Lookup
ciqDataItemDXL	Lookup
ciqDataItemEstimate	Lookup
ciqDataItemEstimateRel	Lookup
ciqDataItemEstimateRelType	Lookup
ciqDataItemFinancial	Lookup
ciqDataItemFormulaMetric	Lookup
ciqDataItemGroup	Lookup
ciqDataItemGroupToDataItem	Lookup
ciqDataItemIndex	Lookup
ciqDataItemIndexLevelVal	Lookup

<b>tableName</b>	<b>tableTypeName</b>
ciqDataItemPIT	Lookup
ciqDataItemToCSMnemonic	Lookup
ciqDataItemTransaction	Lookup
ciqDividendFrequencyType	Lookup
ciqDividendPaymentType	Lookup
ciqDividendSupplementalType	Lookup
ciqDividendType	Lookup
ciqDXLFeedType	Lookup
ciqEstimateRevisionType	Lookup
ciqExchange	Lookup
ciqFinancialDataCode	Lookup
ciqFinancialDataSet	Lookup
ciqFinDataCollectionType	Lookup
ciqFinDisplay	Lookup
ciqFinInstanceToCollectType	Lookup
ciqFinInstanceType	Lookup
ciqFinPeriodDetailType	Lookup
ciqFinStatementRestateType	Lookup
ciqFinUnitType	Lookup
ciqFormType	Lookup
ciqFutureEventEventType	Lookup
ciqFutureEventObjectRoleType	Lookup
ciqFutureEventStatus	Lookup
ciqIdentifierType	Lookup
ciqIHSEconFrequencyType	Lookup
ciqIHSEconScaleType	Lookup
ciqIHSEconSeasonalAdjType	Lookup
ciqIHSEconSubType	Lookup
ciqIHSEconUnitType	Lookup
ciqIHSEconValueType	Lookup
ciqIndexICAType	Lookup
ciqIndexProvider	Lookup
ciqIndexTradingItem	Lookup
ciqIndustryToSIC	Lookup
ciqIndustryType	Lookup
ciqKeyDevEventType	Lookup
ciqKeyDevObjectRoleType	Lookup
ciqKeyDevStatus	Lookup
ciqKeyDocumentExhibitTypeGroup	Lookup
ciqKeyDocumentGroup	Lookup
ciqKeyDocumentType	Lookup
ciqLanguageType	Lookup

<b>tableName</b>	<b>tableTypeName</b>
ciqObjectRelType	Lookup
ciqObjectType	Lookup
ciqOwnerGroupHoldingType	Lookup
ciqOwnerType	Lookup
ciqOwnHoldingPeriod	Lookup
ciqOwnInsiderTransactionType	Lookup
ciqOwnInstitutionType	Lookup
ciqPeriodType	Lookup
ciqProductSourceType	Lookup
ciqProFunction	Lookup
ciqProFunctionBasic	Lookup
ciqRatingCollateralType	Lookup
ciqRatingCountry	Lookup
ciqRatingCouponType	Lookup
ciqRatingCurrencyType	Lookup
ciqRatingDataItem	Lookup
ciqRatingDebtType	Lookup
ciqRatingInstrumentType	Lookup
ciqRatingOrgDebtType	Lookup
ciqRatingPrivatePlacementType	Lookup
ciqRatingProgramType	Lookup
ciqRatingQualifierType	Lookup
ciqRatingQualifierValueType	Lookup
ciqRatingRegion	Lookup
ciqRatingRoleType	Lookup
ciqRatingState	Lookup
ciqRatingSymbolType	Lookup
ciqRatingType	Lookup
ciqRatingValueType	Lookup
ciqReportingTemplateType	Lookup
ciqRestatementType	Lookup
ciqSearchCompanyNameType	Lookup
ciqSecurityFeatureType	Lookup
ciqSecurityGroup	Lookup
ciqSecuritySubType	Lookup
ciqSecurityType	Lookup
ciqSegmentClassificationType	Lookup
ciqSegmentSubTotals	Lookup
ciqSegmentType	Lookup
ciqSimpleIndustry	Lookup
ciqSplitType	Lookup
ciqState	Lookup

<b>tableName</b>	<b>tableTypeName</b>
ciqSubType	Lookup
ciqSubTypeToGICS	Lookup
ciqSymbolType	Lookup
ciqTradingItemStatus	Lookup
ciqTransAccountingMethod	Lookup
ciqTransactionAdvisorType	Lookup
ciqTransactionConditionType	Lookup
ciqTransactionControlStake	Lookup
ciqTransactionDealApproach	Lookup
ciqTransactionDealAttitude	Lookup
ciqTransactionFeeType	Lookup
ciqTransactionRelType	Lookup
ciqTransactionStakeType	Lookup
ciqTransactionStatus	Lookup
ciqTransactionStatusType	Lookup
ciqTransactionToCompRelType	Lookup
ciqTransactionType	Lookup
ciqTransactionUseOfProceeds	Lookup
ciqTransCompanyRelType	Lookup
ciqTransConsidDetailScenario	Lookup
ciqTransConsidStatusType	Lookup
ciqTransConsidSubType	Lookup
ciqTransConsidType	Lookup
ciqTransDataItemMapping	Lookup
ciqTransFeatures	Lookup
ciqTransPrimaryFeatureType	Lookup
ciqTransSecuritySubType	Lookup
ciqTransSecurityType	Lookup
ciqValueType	Lookup
r_accstd	Lookup
r_acqmeth	Lookup
r_actioncd	Lookup
r_auditors	Lookup
r_auopic	Lookup
r_balpres	Lookup
r_cf_fmt	Lookup
r_co_status	Lookup
r_coindpre	Lookup
r_compstat	Lookup
r_consol	Lookup
r_country	Lookup
r_cstclscd	Lookup

<b>tableName</b>	<b>tableTypeName</b>
r_datacode	Lookup
r_datafmt	Lookup
r_divtaxmarker	Lookup
r_docsrce	Lookup
r_ex_codes	Lookup
r_exchgtr	Lookup
r_exrt_typ	Lookup
r_fndfntcd	Lookup
r_footnts	Lookup
r_foricd	Lookup
r_giccd	Lookup
r_hcalendr	Lookup
r_idxcat	Lookup
r_idxclscd	Lookup
r_idxweight	Lookup
r_inactvcd	Lookup
r_incstats	Lookup
r_indfmt	Lookup
r_indsec	Lookup
r_invval	Lookup
r_issuetyp	Lookup
r_majidxcl	Lookup
r_mic	Lookup
r_mic_codes	Lookup
r_mscicntrycurcd	Lookup
r_mscilstalt	Lookup
r_msciregcd	Lookup
r_msciregion	Lookup
r_mscishrcl	Lookup
r_mscishrtyp	Lookup
r_naiccd	Lookup
r_notetype	Lookup
r_ntsubtype	Lookup
r_offcrso	Lookup
r_ogmethod	Lookup
r_opinions	Lookup
r_prc_stat	Lookup
r_qsrcdoc	Lookup
r_sec_stat	Lookup
r_secannfn	Lookup
r_sectors	Lookup
r_siccd	Lookup

tableName	tableTypeName
r_spiicd	Lookup
r_spmicd	Lookup
r_statalrt	Lookup
r_states	Lookup
r_stko	Lookup
r_titles	Lookup
r_updates	Lookup

## ***Content Sets that Deliver Full Data in Multiple Files***

---

### ➤ **Multiple Full File Support**

This enhancement allows the Loader to support packages that deliver the full files in multiple files, making it more efficient to download and load large files.

## ***Adjustments***

---

### ➤ **Adjustment for Control Database connection**

- An adjustment was made to prevent the Oracle Control Database from failing when the Resource is given permission through a specific role.

### ➤ **Adjustment for Oracle Control Database information using Custom Connection String**

- An adjustment was made to ensure that the Control Database information will be retained when connecting to an Oracle Control database using a Custom Connection String to upgrade the Xpressfeed Loader.

### ➤ **Adjustment for the '\$' special character in the Control Database password**

- An adjustment was made to allow for the change of the '\$' special character in the password so that the Control Database Connection settings can be saved successfully.



## Adjustments

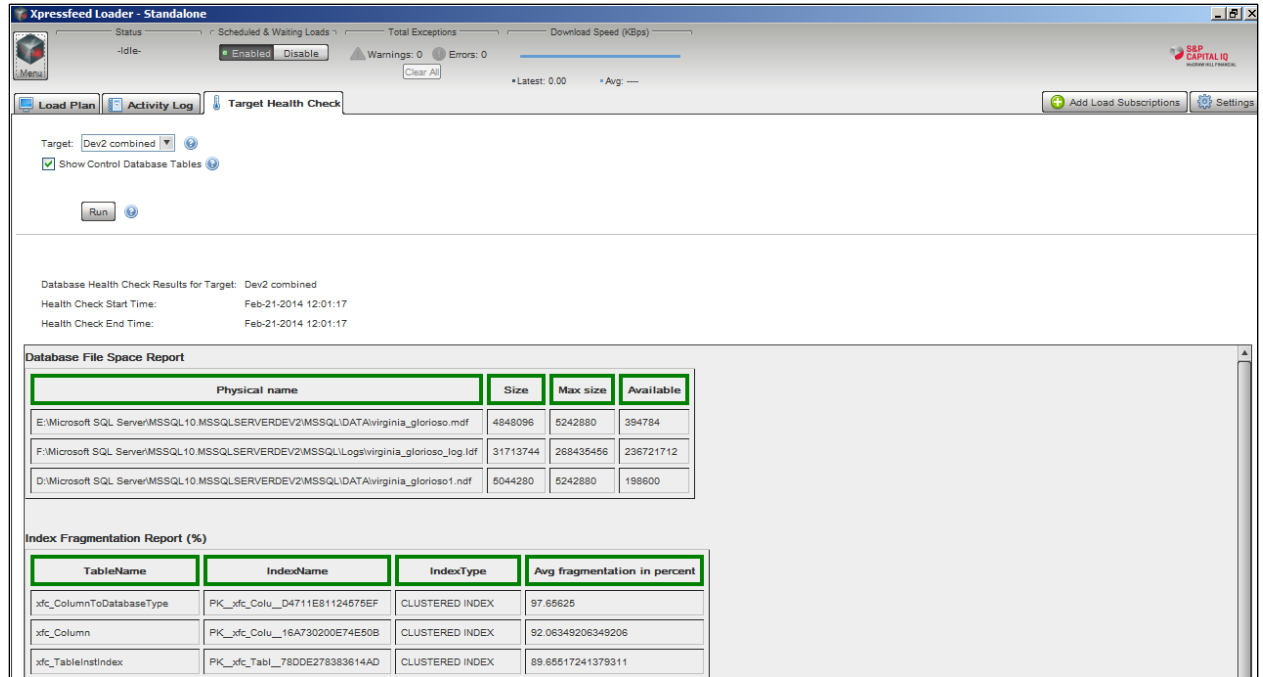
---

- **Adjustment for Selective Delete via Keep option not saving records**
  - An adjustment was made to prevent data loss when selective delete via keep option is used for deleting packages that have overlapping records.
  
- **Adjustment for the Loader connecting to EDX via unsecure FTP with both Active and Passive connection modes**
  - An adjustment was made to correct an issue where the Loader was connecting to EDX via Unsecure FTP with Passive connection modes even if configured as Active mode.
  
- **Adjustment for user-created stored procedures**
  - An adjustment was made to correct an issue where user-created stored procedures were dropped during an upgrade.
  
- **Adjustment for FTP Download**
  - An adjustment was made to ensure that partially downloaded files are not deleted from the download location when the connection is lost and the Source is in Active or Passive connection modes. This allows the resumption of the download to pick up where it left off.
  
- **Adjustment for upgrades, shared tables, V2 packages**
  - An adjustment was made to correct an issue where any package that shared tables with the package that was being upgraded is now forced to be upgraded as well.

## GUI Application > Target Health Check


### ➤ **New! Target Health Check Tab**

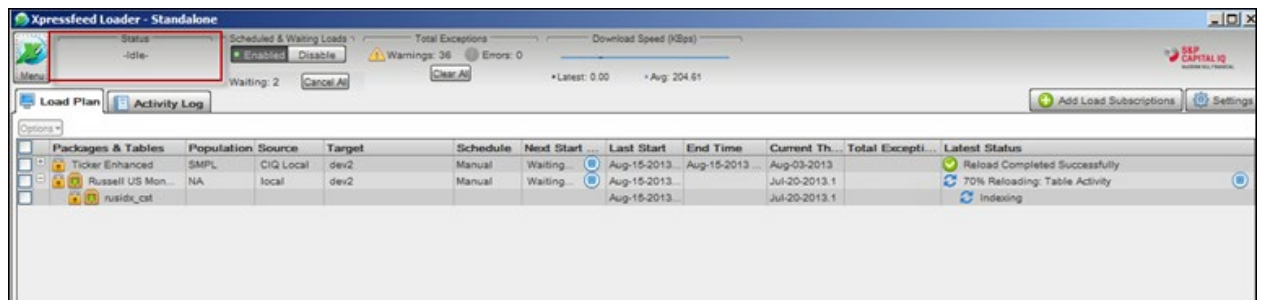
This new feature facilitates the analysis of the Target Database health by reporting on results of Log Space and Space on the Drives, and determining whether tables have been analyzed and identifying tables that have stale statistics.



## GUI Application: New Dashboard Status Indicator

### ➤ **Load Job goes to “Waiting” when searching for Feed Configuration update on restart.**

This feature displays an indication for why a load is waiting, when the feed config is loading. When starting the Loader, and the Feed Configuration is loading, the spinner  will be displayed in the Status area of the Dashboard along with the following text: “Searching for Feed Configuration”.



## Settings: Proxy Tab

---

### ➤ **Enable Custom Proxy in the Protocol Field**

This feature enables Custom proxy configuration to support Active and Passive connectivity. The custom selection on the Proxy Tab for Protocol will be enabled when either of the following is true:

- You have Unsecure and Secure FTP Sources configured.
- You have only unsecure FTP Sources configured.

## Settings: Targets Tab

---

### ➤ **New Edit Option for Downloads Directory**

The newly added Edit Button allows you to edit the downloads directory setting in the Targets Tab.

### ➤ **Type: Microsoft SQL Server**

Removed the Machine Name and Share Name fields and replaced them with a new field: "Bulk Load Path for SQL Server."

### ➤ **Bulk Load Path for SQL Server**

This new setting provides support for the UNC Path or a Mounted Drive for SQL Server.

## Settings: Miscellaneous Tab

---

### ➤ **Added option to check for new files at every load start.**

This feature checks for new files at the start of a load without waiting for the "Check for new files" auto-detection to be kicked off based on the Setting's value. The expectation is to check for new files when either loading manually or on a schedule and not check for new files if the Package is marked as Continuous schedule.

## Adjustment

---

### ➤ **Not Indexing full only loads if full load is finished and no new files.**

An adjustment was made to correct a situation when, upon loading a bad Compustat file with duplicate keys, the initial load failed and the subsequent load showed incorrectly to be successful. The adjustment is to retry the index when there is no action to perform. The index will always be applied if it is not there, even when there are no new files to load.

# 2014-01 v5.3.2.24b

## *Adjustments*

---

### ➤ **Adjustment for out of memory issue**

- An adjustment was made to alleviate a potential out of memory issue when upgrading the XF Loader from prior versions of v5 to v5.3. This adjustment will allow the upgrade process to complete without encountering an out of memory issue.

### ➤ **Adjustment to Change Tracking Records**

- An adjustment was made to correct an issue where one extra day was being included when deleting Change Tracking Records.

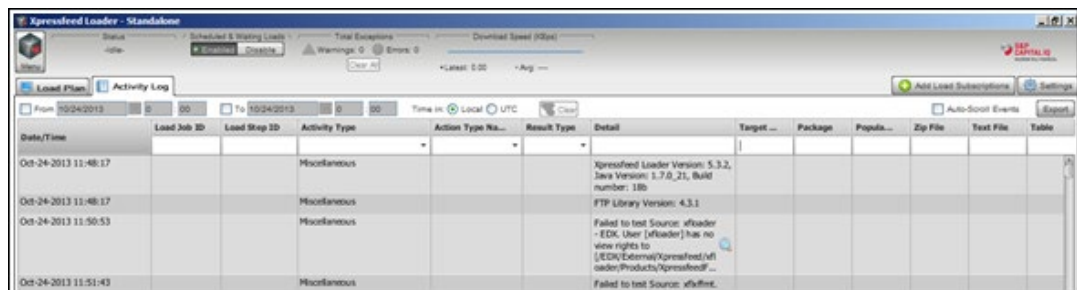
## GUI Application > Activity Log

### ➤ Activity Log has new column filtering features that allow you to filter by:

- Load Job ID
- Load Step ID
- Activity Type
- Action Type
- Result Type
- Detail
- Target Database
- Package
- Population
- Zip File
- Text File
- Table

### ➤ From Date Time / To Date Time / Time in Filtering

- **From Date Time** – When checked, this field will filter all Activity Events from this Date Time forward.
- **To Date Time** – When checked, this field will filter all Activity Events to this Date Time.
- **Time in** – This feature provides the capability to toggle the current Activity Log tab from local time to UTC (Coordinated Universal Time):
  - Local
  - UTC
- **Export** – This feature allows you to export what is in the GUI, or, if filter parameters are used, to export the filtered results.



### ➤ Column Filtering

The column filters are an extra row below the header row and provide the capability to:

- Filter all columns (except the Date/Time columns)
- Filter on zero or more columns
- Force a re-filter anytime the Column Filter changes focus

## ***GUI Application > Change Tracking for Target Database Tables***

---

### **➤ Change Tracking**

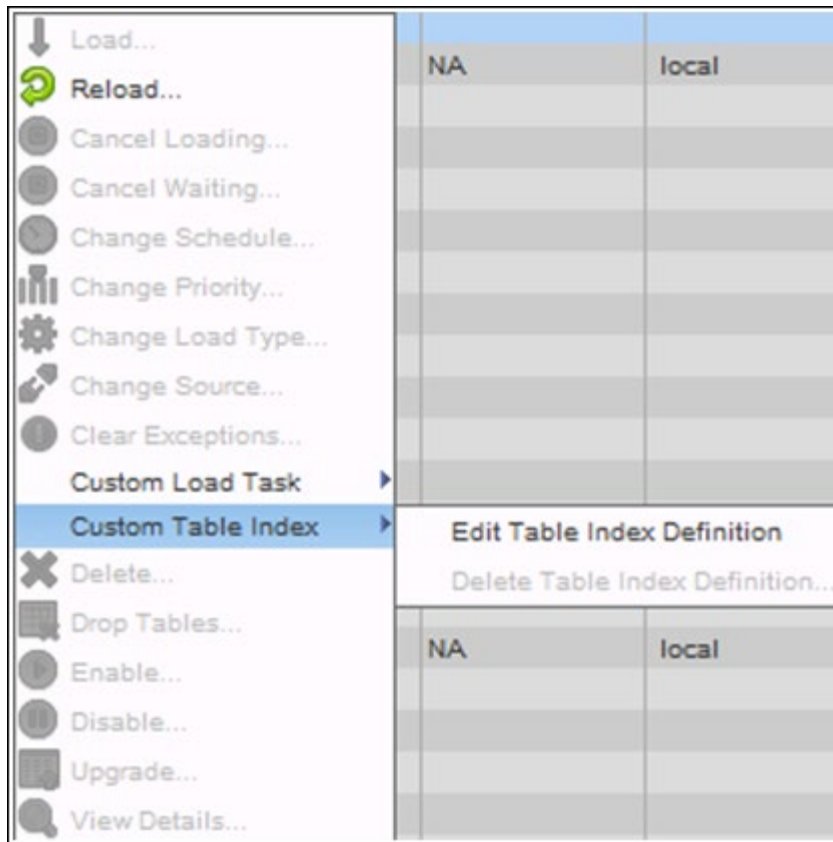
- A new feature that allows you to track change records per table for each package specified.
- Once enabled, these Change Tracking tables are created on initial load, and the change records are captured in the specified Target Database every time the package is loaded. Change Tracking tables are maintained per Target database.
- The feature will allow you to record change data and utilize the tables to determine when certain values change.
- Change Tracking tables can be maintained for all change files. Only tables that have Change records will be in the Change Tracking tables. The data from the full load, full replace tables (lookup tables) and tables for Full only Packages will not be captured.
- The content of Change Tracking tables is your data and needs to be managed by you (may be deleted at any time).
- This feature requires extra disk space on the Target Database, taking into account how many packages and how much history you want to track.
- Usage of this feature is subject to clients having the necessary technical resources and licensing agreement with S&P Capital IQ.

**Note:** Please contact your Datafeed Application Specialist, if you are interested in hearing more about this new feature.

## ***GUI Application: Load Plan: Option Menu: GUI Custom Table Index Definition***

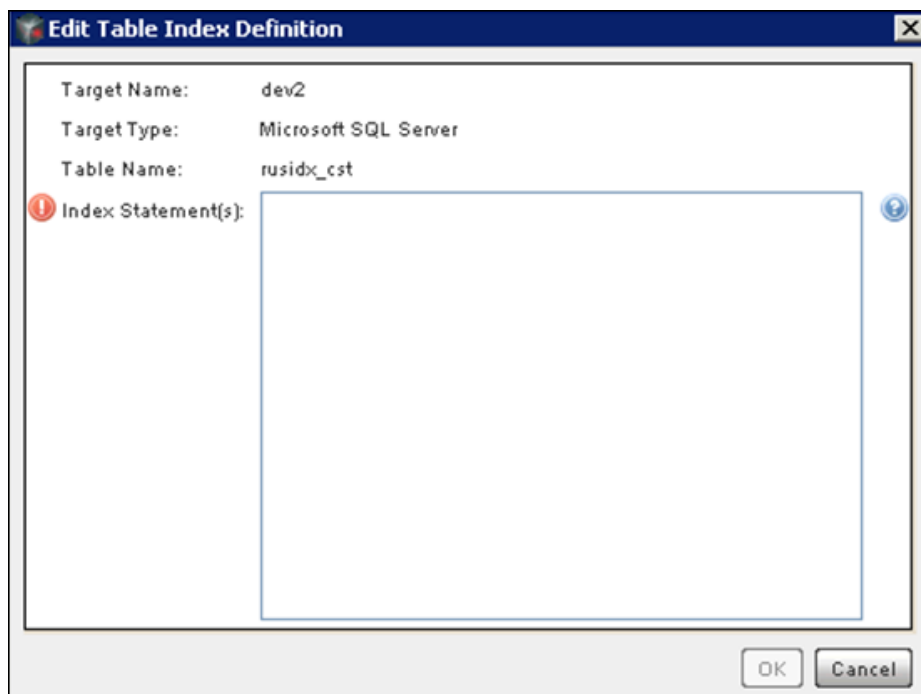
---

- **A new feature enables you to specify a custom SQL at the Load Subscription Table level.**




➤ **Custom Table Index > Edit Table Index Definition**

This feature provides the capability to specify a custom SQL table index definition at the Load Subscription Table level.



**GUI Application > Load Plan**


➤ **Source Column**

The **Blue Star icon**  was added to the Source column to indicate that the package is using the non-preferred source(s).

### **GUI Application > Add Load Subscription Dialog**

---

#### ➤ **Status Column**

The **Gold Star icon**  was added to the Status column to indicate that the package is using the preferred source(s).

### **GUI Application > Package Upgrade Message Dialog Popup**

---

**Additional text was added to the package upgrade message dialog.**

- For button "**Continue**" – *Package table(s) will be dropped / updated as determined by the new package's structure; however, no loading will be done on any altered tables as a part of the upgrade process.*
- For button "**Continue with Required Reload**" – *The package's table structure will be altered to reflect the new package definition, and then a data reload on the affected table(s) will be performed.*



## Settings: Proxy Tab

---

- New Proxy Tab dialog showing new field: Use Proxy Settings and Protocol:

The screenshot shows the 'Settings' dialog box with the 'Proxy' tab selected. The 'Use Proxy Settings' checkbox is checked. The 'Protocol' dropdown menu is set to 'SOCKS5'. Below this, there are five input fields: 'Host' (with a red warning icon), 'Port', 'Username', 'Password', and 'Public Address'. Each field has a help icon to its right. At the bottom center of the dialog is a 'Test Proxy Settings' button. At the bottom right are 'OK', 'Apply', and 'Cancel' buttons.

- **Use Proxy Settings** – When checked, this option provides the capability to configure and specify the Proxy setting for the Source(s).
- **Protocol** – This field allows you to configure their proxy protocol when the Proxy Settings Manually Configure option is selected, using one of the following options:
- SOCKS4
  - SOCKS5
  - HTTP
  - CUSTOM

**Important!** Default is SOCKS5.

## Settings: Notifications Tab

---

### New Notification Types

- **Package Change** – When checking Package Change notification, an email will be generated for Package Upgrade or Package Expiration.
- **Gap** – When checking Gap notification, a notification will be sent when a Gap occurs. A Gap occurs when there is a detected missing file between full files, between full and the first Change, and Gap between changes.

### ***Settings: Schedule Tab***

---

- **Recurring Monthly Schedule** – An enhancement prevents saving the Recurring Monthly Schedule when the 30<sup>th</sup> or 31<sup>st</sup> day is chosen for any month that does not have those days.

### ***Settings: Targets Tab / Miscellaneous Tab***

---

- **Downloads Directory setting moved to Targets Tab from Miscellaneous Tab**  
  
During the initial setup, this provides clients the ability to change the Downloads directory from the default install directory while setting up the Target DB settings and, thus, eliminate extra steps when configuring the Downloads Directory setting.
- **Downloads Directory setting was removed from Miscellaneous Tab.**

## *Adjustments*

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### ➤ **Adjustments in Custom Proxy Connection**

- An adjustment was made in the custom proxy connection area to correct a situation where the application inadvertently replaced the username for the FTP connection with the password during new installs and during upgrades.
- An adjustment was made to correct a situation where the Active Mode was not set when using a Custom Proxy. It was using Passive Mode, instead, and has been corrected.

### ➤ **Adjustment in Oracle when using filtering in Activity Log**

- An adjustment was made to correct an Oracle error that was occurring when using filtering by date in the Activity Log tab.

## *Adjustments*

---

### ➤ **Adjustments in Custom Proxy**

- An adjustment was made to the Custom Proxy area to successfully correct a situation wherein the password was inadvertently being used in place of the username.
- An adjustment was made to the Custom Proxy area to successfully set the Active connection mode, as opposed to the default (Passive), when Custom Proxy is configured with an Unsecure FTP – Active source.

### ➤ **Adjustment in Activity Logs – Oracle Databases**

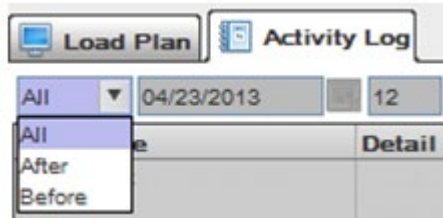
- An adjustment was made to the Activity Logs to successfully correct the filtering of events logged by the Date/Time filter.

## Activity Log

### Date/Time Additional Filtering

#### ➤ All/After/Before

This modifier provides additional filtering and returns results based on the All/After/Before selection.



**After** returns results that are the Activity Detail events occurring after the Date/Time specified.

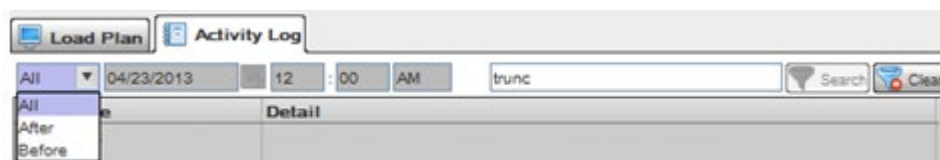
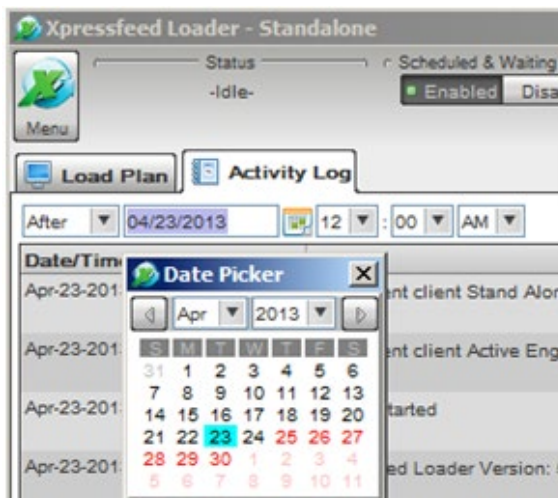
**Before** returns results that are the Activity Detail events occurring before the Date/Time specified.

**All** turns off Date/Time filtering and shows all Activity Detail events.

**Note:** Date and Time is enabled when the value “After” or “Before” is specified.

#### ➤ Calendar/Time

This modifier returns results based on date and time selection.



## Notifications Tab

The new feature—**Enable Load Monitoring**—sends a copy of the email to the Datafeed Application Specialist Team.

When the email settings are configured and the Checkbox *Enable Load Monitoring* is checked and if one or all of the Notification Types (Info./Warning/Error) are checked, the *Enable Load Monitoring* feature sends a copy of the email Notification Type(s) that are checked marked to the following email address:  
[ul-monitor@spcapitaliq.com](mailto:ul-monitor@spcapitaliq.com).

The default of the *Enable Load Monitoring* feature is checked.

**Important!** If there are no Notification Types specified, no email notifications will be sent.

The screenshot shows the 'Settings' dialog box with the 'Notifications' tab selected. The dialog has a title bar with 'Settings' and a close button. Below the title bar are several tabs: 'Sources', 'Targets', 'Proxy', 'Email', 'Notifications', 'Schedules', and 'Miscellaneous'. The 'Notifications' tab is active and contains a table with three columns: 'Send Email', 'Recipients (comma-separated)', and 'Subject Line'. There are three rows for 'Info.', 'Warning', and 'Error'. Each row has a checkbox in the 'Send Email' column, an empty text box in the 'Recipients' column, and a text box in the 'Subject Line' column. Below the table is a checkbox labeled 'Enable Load Monitoring' which is checked and highlighted with a red box. At the bottom right of the dialog are 'OK', 'Apply', and 'Cancel' buttons.

Send Email	Recipients (comma-separated)	Subject Line
<input type="checkbox"/> Info.		Xpressfeed Loader - Info Notification
<input type="checkbox"/> Warning		Xpressfeed Loader - Warning Notification
<input type="checkbox"/> Error		Xpressfeed Loader - Error Notification

Enable Load Monitoring

## Schedules Tab

### Update to Schedules Tab > Recurring Monthly

The new feature—**Select Months <ctrl>click**—allows you to select one or more months in which to run the Monthly Recurring Schedule.

The screenshot shows the 'Settings' dialog box with the 'Schedules' tab selected. The 'NewSchedule1' window is open, showing the following configuration:

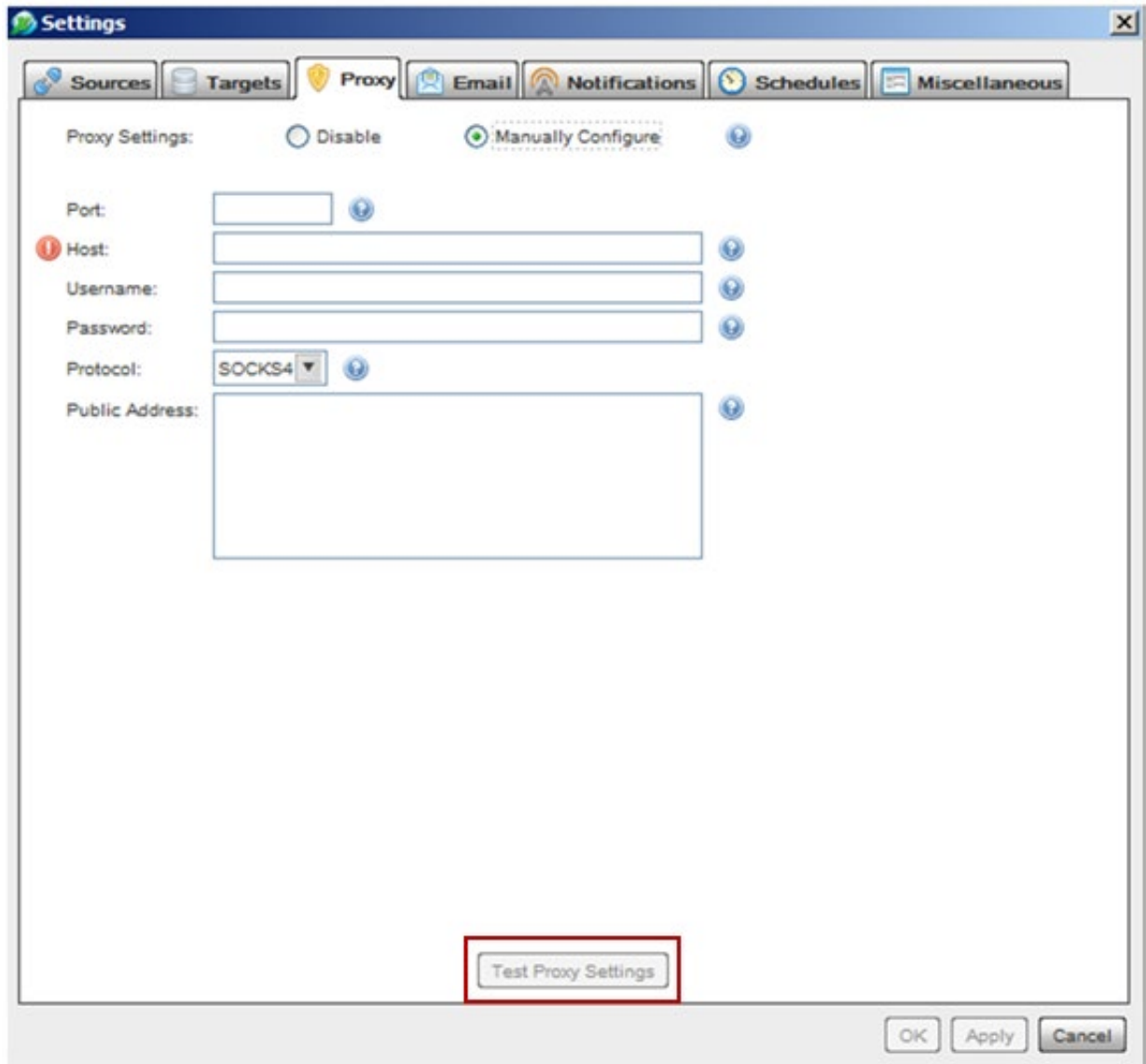
- Description: NewSchedule1
- Schedule Type: Recurring Monthly
- Time Zone: (GMT-6) America/Denver
- Choose:  Day 1,  The First,  Monday
- Select Months: A list box containing Jan, Feb, Mar, Apr, May, Jun, and Jul. This section is highlighted with a red box.
- Times: 12 : 00 AM. There are 'Add' and 'Delete' buttons next to the time field.

At the bottom of the dialog are 'OK', 'Apply', and 'Cancel' buttons.

## Proxy Tab

The new feature—**Test Proxy Settings**—allows you to initiate a test for the Proxy Settings for all non-Local Sources.

**Important!** In order to save settings, the test Proxy Settings must be successful. The test will also be run when *OK* and *Apply* are selected. The *Test Proxy Setting* button will be enabled when all required settings are specified. When failure occurs on any of the non-Local Sources, a message dialog is presented listing the Sources that failed. Correction must be made to the applicable settings.



The screenshot shows the 'Settings' dialog box with the 'Proxy' tab selected. The 'Proxy Settings' section has two radio buttons: 'Disable' (unselected) and 'Manually Configure' (selected). Below this are several input fields: 'Port', 'Host' (with a red warning icon), 'Username', 'Password', 'Protocol' (set to 'SOCKS4'), and 'Public Address'. Each field has a help icon to its right. At the bottom of the dialog, there is a 'Test Proxy Settings' button highlighted with a red rectangle, and three buttons: 'OK', 'Apply', and 'Cancel'.



Main Menu Option

 **About** dialog

The *About* dialog has been enhanced to show the current Feed Config version number:



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