

# **Opera II (6.81)**

## Guide to Enhancements



**Please note: all features marked with an asterisk (\*) apply to Opera II Enterprise only.**

F1 Help in Opera II (6.81) has been updated to include extensive information on all enhancements and functionality, as well as useful examples of how to use the software. The Release Guide includes a detailed description of all changes that have gone into this release, as well as a history of enhancements included in previous releases. The Release Guide can be accessed from the Opera II 'Help' menu under 'Guides'.

## ARCHITECTURE, PLATFORM AND USER INTERFACE

FEATURE	EXPLANATION	BENEFIT
SQL SERVER 2008 SP1	Opera II Enterprise SQL (6.81) and Pegasus Document Management (2.11) have been tested on SQL Server 2008 Service Pack 1.	Opera II Enterprise SQL (6.81) and Pegasus Document Management (2.11) can be implemented using the latest Microsoft environment.
INTERNET EXPLORER 8	Opera II Enterprise (6.81) and Opera II Dashboards (2.60) have been tested on Microsoft Internet Explorer 8.	Opera II Enterprise (6.81) and Opera II Dashboards (2.60) can be implemented using the latest version of Internet Explorer.

## FINANCIALS

FEATURE	EXPLANATION	BENEFIT
PURCHASE LEDGER: NORTHERN BANK BACS FILE FORMAT	Purchase Ledger Set Options now allows the selection of 'Northern Bank' for BACS Payment Software.	The 'Northern Bank' file format can now be used for Purchase Ledger Payment Processing.
CASHBOOK: NORTHERN BANK BACS FILE FORMAT	Cashbook Set Options now allows the selection of 'Northern Bank' for BACS Payment Software.	The 'Northern Bank' file format can now be used for Cashbook N/L BACS Payments.
FIXED ASSETS: SPREADSHEET IMPORT*	A spreadsheet import routine has now been added to the Fixed Assets Utilities menu.	Users can upload their existing asset register from a spreadsheet into Opera II Fixed Assets. Any other asset records can also be imported in bulk as and when required.

## OPERA II DASHBOARDS AND DASHBOARDS MANAGER\*

FEATURE	EXPLANATION	BENEFIT
NEW 'DASHBOARDS' MENU ITEM*	A new 'Dashboards' menu item has been added to the Dashboards Manager menu, which enables the creation of multiple Dashboards. Each Dashboard can control which users have access to it and which charts are available for selection. In addition, 'Layout Changes' can be switched on to enable the user viewing a particular Dashboard to customise the number of charts displayed at any one time (minimum 1, maximum 16).	Each user or group of users can now have a completely private Dashboard tailored to include only the charts they need.
'AUTOREFRESH' FEATURE*	An 'Autorefresh' interval can be defined against each Dashboard. Refresh intervals can also be specified per custom chart.	Dashboards and charts can be refreshed automatically for a true and accurate representation.
CHARTS: NEW NAME AND MENU*	The Dashboards Manager 'Processing' command has been renamed to 'Charts' and has been enhanced to include the following new Action menu items: <ul style="list-style-type: none"> <li>● Drilldowns</li> <li>● User Filters</li> <li>● Edit SQL</li> </ul>	These new items strengthen the functionality for creating complex customised charts.
NEW CHARTS MENU ITEM: 'DRILLDOWNS' *	This new feature allows drilldowns to be easily set up, enabling customised charts to drill down to either another chart, a Dashboard or a website.	Users are instantly presented with the detailed information they require, in as little as a single click.
NEW CHARTS MENU ITEM: 'USER FILTERS' *	This new feature enables the data displayed on individual charts to be restricted per user per field if required. For example, different Territories, Regions or Accounts can be restricted per user.	Users will only be able to view data that is relevant to them and will not be able to view any information they are not permitted to.
NEW CHARTS MENU ITEM: 'EDIT SQL' *	This new command provides the ability for qualified personnel to create or edit charts by entering or manipulating SQL Select statements. Previously new charts could only be constructed using the Data Details function. The new 'EDIT SQL' command also provides the functionality for advanced construction of complex charts which are outside the capabilities offered by the Data Details form.	Provides an additional way for qualified personnel to create complex customised charts.

## OPERA II DASHBOARDS AND DASHBOARDS MANAGER\* *cont.*

FEATURE	EXPLANATION	BENEFIT
<p>DATA DETAILS: NEW 'CHART GROUPING' AND 'SUMMARISATION' FIELDS*</p>	<p>Two new fields, 'Chart Grouping' and 'Summarisation', have been added to the Field tab of the Data Details form. 'Chart Grouping' can be switched on against the required fields, to allow a summarised value to be displayed within a chart. Users may then choose how they wish to group the information, per field, from the 'Summarisation' dropdown menu. Options available are:</p> <ul style="list-style-type: none"> <li>● Summary</li> <li>● Count</li> <li>● Maximum</li> <li>● Minimum</li> <li>● Average</li> <li>● Total</li> </ul>	<p>User friendly functionality to group data together and achieve a summarised, more meaningful value within a chart, without the need to construct SQL Select statements.</p>
<p>NEW CHART STYLES (MULTI SERIES CHARTS ONLY)*</p>	<p>Two new chart styles have been added for selection when creating and viewing Multi Series Charts:</p> <ul style="list-style-type: none"> <li>● Logarithmic Column</li> <li>● Logarithmic Line</li> </ul>	<p>Enables users to present data with large differences in scale, on the same chart.</p>
<p>NEW CHART DETAILS OPTION: 'ITEM INFORMATION' FIELD*</p>	<p>This new field has been added to the 'Item Definition' controls within the Chart Details form. It allows additional information (maximum 1000 characters) about the chart to be entered, which the user can view. This field is available for all charts.</p>	<p>Additional descriptions can be entered when required, which makes complex custom charts more user friendly and easier to understand.</p>
<p>NEW CHART DETAILS OPTION: 'REFRESH INTERVAL' FIELD*</p>	<p>This new field has been added into the Chart Details form for new Grid, Single Series and Multi Series charts. Previously this functionality was only available for new Single Value Charts.</p>	<p>Data can be displayed at pre-defined real-time refresh intervals, ensuring that the information presented is as up to date and accurate as possible.</p>
<p>NEW CHART DETAILS OPTION: ROW 'HIGHLIGHT VALUES' (NEW GRID CHARTS ONLY)*</p>	<p>The 'Highlight Values' option previously available for new Grid Charts only enabled individual cells to be configured and highlighted. This new feature allows entire rows to be highlighted, as well as individual cells.</p>	<p>Further flexibility for users to construct their own alerting colour-coded system (a form of conditional formatting) which is meaningful to them, ensuring critical information does not go unnoticed.</p>

## OPERA II DASHBOARDS AND DASHBOARDS MANAGER\* *cont.*

FEATURE	EXPLANATION	BENEFIT
TWO NEW FIELDS ADDED TO FILTERS: 'MULTIPLE SELECT' AND 'DEFAULT VALUE' *	Two new fields, 'Multiple Select' and 'Default Value' have been added to the Chart Details Filters options for all Chart Types. The 'Multiple Select' dropdown field allows the selection of more than one value from the selected 'Filters' dropdown list. The 'Default Value' field allows a default value to be specified against the selected filter which will appear as the initial value when the chart is first loaded.	Flexible filtering controls that allow the data displayed to be restricted to multiple values instead of just one. An automatic default value can be populated so that the user instantly sees filtered data that may be more relevant without needing to add in filter details.
NEW 'TREND POINTS' OPTIONS: ANGULAR, CIRCULAR AND LINEAR GAUGE SINGLE VALUE CHARTS ONLY*	Trend points can now be set up as either lines or markers, which can represent targets and/or trends on Angular, Circular and Linear Gauge Single Value Charts only. Labels, Values and colour definition can all be specified within the options available.	Further customisation of particular Single Value Charts which are more meaningful to the user. This enables a target to be compared against the actual value, and allows trends to be identified quicker by making them more recognisable.
NEW 'CATEGORY NAMES DISPLAY' FIELD (SINGLE SERIES AND MULTI SERIES CHART TYPES ONLY)*	This new dropdown field allows the user to choose how the category labels on the X-axis should be displayed from the following options: Default, Angled, Horizontally, Vertically, Wrapped.	Additional user-definable display properties that enable Single Series Charts to be designed and presented specifically to suit the users preferences.
NEW 'CATEGORY NAMES LENGTH' FIELD (SINGLE SERIES AND MULTI SERIES CHART TYPES ONLY)*	This new field allows the user to specify the maximum character length for the x-axis category labels (minimum of 4 characters, maximum of 30).	Additional user-definable display properties that enable Single Series Charts to be designed and presented specifically to suit the user's preferences.
NEW 'SHOW FULL HOVER TEXT' FIELD (SINGLE SERIES CHARTS ONLY)*	This new field allows the users to specify whether the full category name should be displayed when the mouse hovers over each plotted value.	If category names are too long to be displayed on the X-axis in full, this option can be switched on to show the category name in full only when the mouse hovers over the plotted values.
NEW 'SHOW LEGEND' FIELD (MULTI SERIES CHART TYPES ONLY)*	This new field allows the user to specify if the series legend should be displayed on the chart or not.	Further tailoring properties for the designer of the chart.

# CUSTOMER RELATIONSHIP MANAGEMENT

FEATURE	EXPLANATION	BENEFIT
SPM SET OPTIONS: NEW 'DO NOT STORE EMAIL BODY TEXT IN HISTORY' OPTION*	This option controls whether e-mail messages created within the CRM modules (Sales Pipeline Management, Service & Helpdesk Management), are stored within the Opera II database or whether a link is created to the e-mail message, which is stored in another location.	Reduces the size of the database when e-mails are sent from or imported into the CRM modules, which improves the performance of the system.
HELPDESK PROCESSING CHOOSE EQUIPMENT: NEW ' SHOW ALL SITES' OPTION*	This option has been added to the Helpdesk Processing Choose Equipment form, to allow users to select from Equipment items located across all site addresses for the relevant company, rather than only being able to choose from Equipment items that are located at the specific site address that has logged the call.	Flexibility for helpdesk operators so that they can log a helpdesk call against a piece of Equipment that may belong to a different site address of the company logging the call.
SPM CONTACT ADVANCED SEARCH: NEW ' INCLUDE INACTIVE CONTACTS' OPTION*	This option has been added to the Contacts Advanced Search form to enable SPM contacts that have been marked as inactive to be included in the search results.	Further control and flexibility when entering criteria to search across current and historical SPM Contact records.
SERVICE CONTRACT ADVANCED SEARCH: NEW 'INCLUDE INACTIVE SERVICE CONTRACTS' OPTION *	This option has been added to the Service Contracts Advanced Search form to enable Service Contracts that have been marked as inactive to be included in the search results.	Further control and flexibility when entering criteria to search across current and historical Service Contract records.
MAIL MERGE WIZARD: NEW 'MAXIMUM NO. OF RECORDS PER OUTPUT DOCUMENT' CONTROL*	This option has been added to all Mail Merge Wizards in the CRM modules and allows users to specify how many batches each mail merge run should contain and how many documents should be in each batch. For example, when performing a mail merge to 550 contacts, and specifying 100 for the Maximum No. of records per output document, 6 batches of mail merges would be created: the first 5 would contain 100 documents, and the last would contain 50. This new feature is available for all types of mail merge, Word Processor, Printer and E-mail.	Improved processing speeds throughout the CRM modules when performing any type of mail merge, Word Processor, Printer or E-mail.

## PEGASUS DOCUMENT MANAGEMENT (2.11)

FEATURE	EXPLANATION	BENEFIT
RETRIEVE CRITERIA: NEW ' SORTING' OPTIONS	New 'Sorting' options have been added to the Criteria tab of the Retrieve Information form, allowing the user to control how search results are sorted. Users can choose to sort results by Document Version, Newest to Oldest, or Oldest to Newest.	Improved control over how retrieved documents are displayed, making it easier to locate the required document.

## ADMINISTRATION

FEATURE	EXPLANATION	BENEFIT
UPDATE DATA STRUCTURES: ADDITIONAL SYSTEMS	If Additional Systems are in use, the Update Data Structures (UDS) command can now be performed on different computers in more than one Additional System at the same time.	Drastically reduces the time taken to perform system upgrades or system restores and improves housekeeping routines, keeping disruption to a minimum.



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