

## EPIC for Windows 5.00 Release Notes

### Introduction

Version 5.00 of EPIC contains many improvements and changes from previous versions of EPIC, making more powerful and easier to use. However, the powerful user interface remains largely unchanged, allowing users of previous versions to easily migrate to the new version. This document describes the changes between version 4.10 of EPIC and version 5.00.

### Changes

- The EPIC program now uses port 80 and port 21 to retrieve information from fordupdate.com. It may be necessary to change your firewall or proxy server rules to accommodate this new requirement.
- The program name has changed from EPICWFCA.EXE to EPICWIN.EXE. Anything referencing the old filename will need to be updated, such as shortcuts and firewall rules.

### New Functionality

#### ***ADR Database***

- The Ford ADR Universe is now available as an EPIC database. This requires a separate subscription.

#### ***Financial History***

- It is possible to view financial history information for the US database. A link on the *One Company* display gives access to income statement, balance sheet and cash flow data, including averages, standard deviations and growth rates.
- Variables for the financial history information are available, giving access to income statement, balance sheet and cash flow items in views so they can be displayed in portfolio and sector results.


#### ***Company Detail Information***

- Fundamental information about companies, including News, Annual Reports, EDGAR information and Industry Reports is available. If you are subscribed to this option the Company Detail button on the *One Company* display gives access to this information.

#### ***Interface***

- It is now possible to open EPIC without a database. A message will be displayed if no database is available.



- It is possible to prefix the EPIC program shortcut with a database type, to load that type by default. For example EPICWIN.EXE ADR will open the ADR database by default (if it is available).
- When a database is opened the database type is displayed in the title bar.
- The Open Database icon  has been added to the toolbar. This opens a dialog that allows the user to select which database type they want to use and provides a list of databases available for the type in reverse chronological order.
- If a US database is opened and a US Financial History database for the same date is available it will automatically be opened. If no financial history database is available an n/a will be displayed in the status bar on the bottom, right of the screen.
- It is now possible to add two headings lines for Spare Variables.
- If a user experiences difficulties downloading data from Fordupdate.com, it is possible to activate the Debug capability, to help with the trouble-shooting process. Click on *Help, Debug* to activate this feature.
- If an Error Log is displayed then it can be saved as a comma delimited file or plain text file, by clicking on *File, Save As*. It is also possible to click on the *Excel Link* button to export the log directly into a spreadsheet.

## **Database Retrieval**

- The *Update DB* button has been replaced with the *Get Current DB* button. This provides a one button update for all databases that the user has subscribed to, such as US, US Financial History and ADR.
- The *Get Older DB* button has been introduced. This allows users to download previous databases from a list.
- It is now possible to abort the download process, by clicking the *Cancel* button.
- Databases are retained in the user's database directory.
- Proxy server support for database downloads has been enhanced to allow the user to set proxy server information for the FTP protocol.
- The user can specify the default database type for EPIC to open. Click on *Options, Database Update* then the *DB Info* tab and select the default database from the drop-down list.

## **Portfolios**

- It is possible to load a portfolio from a text or csv format file.
- The users can export just the tickers or cusips from a portfolio into rows or columns and save them in a comma delimited file or ASCII text file.
- If a user attempts to import portfolio specific variables (rather than opening a portfolio file) then an error message will be displayed.

## ***File Organization***

- Database file names contain the database type and date. For example the US database for May 3<sup>rd</sup>, 2007 would be EPICDBUS20070503.DAT.
- A tab has been added under *Options, Database Update* for each database type, allowing the user to select different settings for each database type.
- Each database type is now stored in a separate directory.
- A separate copy of the spare variable database is created for each database type.
- The *User Directory* setting has been replaced with separate user files for each database type (portfolios, screens, sectors, views), accessible under *Options, Database Update* on the separate database tabs.

## ***Install***

- An improved installation program has been introduced which registers EPIC and allows EPIC to be repaired on un-installed from the Windows Add/Remove Programs applet.
- An upgrade utility is provided to allow users to seamlessly migrated their data from version 4.x of EPIC to the current version.
- A new licensing model had been introduced that gives users access to the EPIC features and options they subscribe to.

## **Resolved Defects**

- Calculated variables are rounded to number of displayed decimals in screen and sector ranking.
- In a Screen sometimes the number for max stocks was not saved.
- Commas within column headings were removed since this was causing a problem when linking to Excel or when saving results to a comma delimited file
- In some instances the standard deviation calculation was incorrect for results with samples containing only one stock.
- If an import file had a blank line at the end then it would fail to import.
- If a CUSIP with a leading zero was imported into Excel the leading zero would be lost.
- In some instances column headings may not have been aligned correctly when printing or linking to Excel.
- It was possible to import Portfolio files with no error, which may have caused some confusion.