



# What's New in PerfectForms™ Version 1.18

Release Date: October 25<sup>th</sup>, 2010

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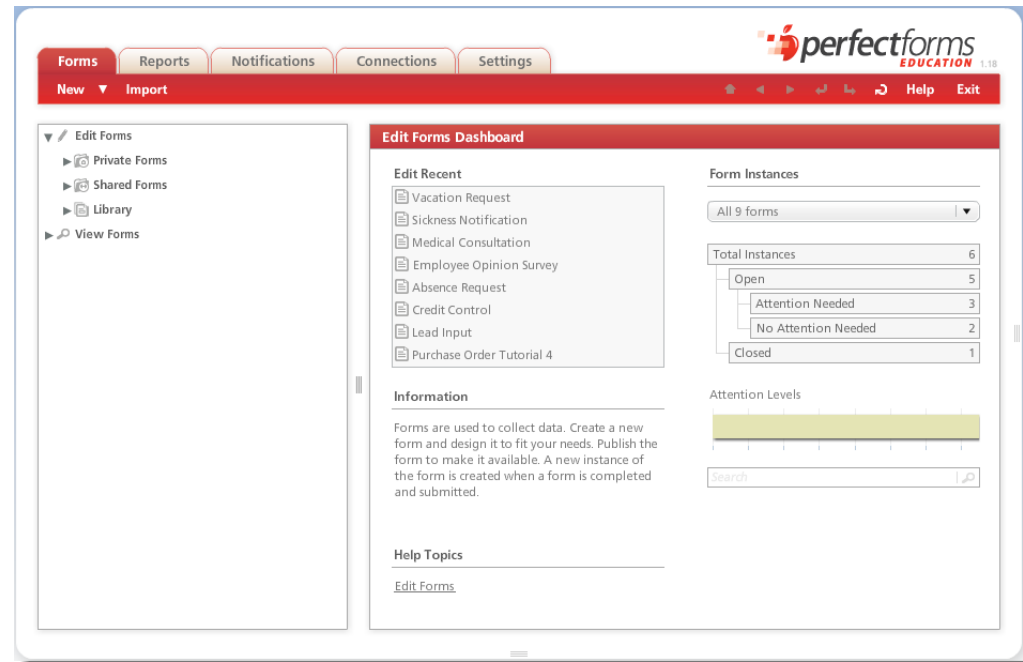
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# 1 PerfectForms and Education

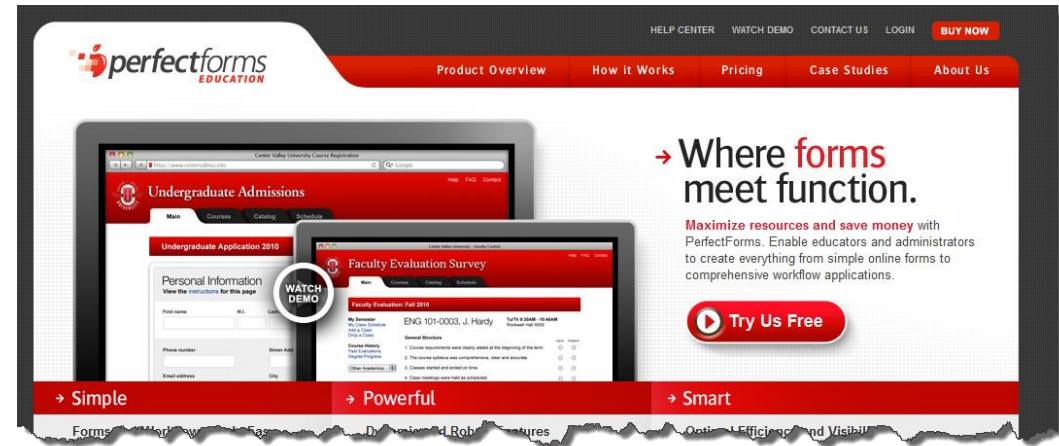
## 1.1 New PerfectForms Product for Education

To better serve our education customers, we have launched a new PerfectForms application specifically for educators. This is available for both On-Demand and On-Premise users. Within this application we offer 58 library form templates tailored towards education. These include Absence Notice, Application for Graduation, Student Registration and many others. With these library form templates, you can preview the form design, import it into your Private Forms folder on the Dashboard and then customize the design as needed.



## 1.2 New PerfectForms Education site

In addition to the new application for educators, we have also launched a [PerfectForms education site](#). This site provides case studies that highlight how education customers such as the Visalia Unified School District, The University of Tennessee at Martin, and The University of Portland are using PerfectForms.



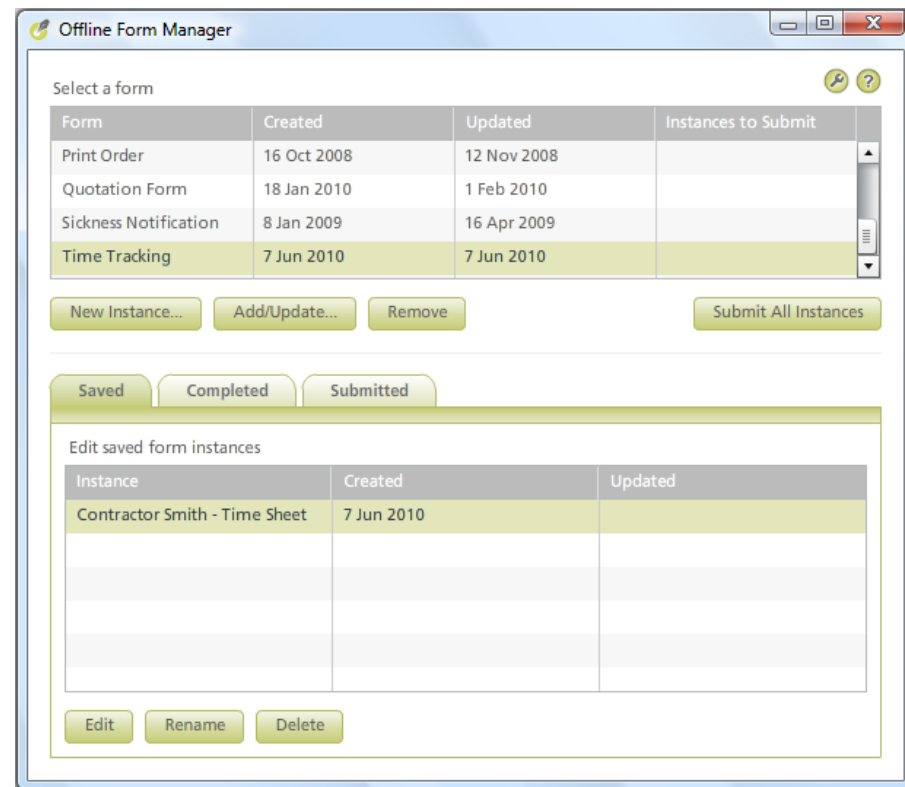
## 2 Offline Form Manager

### 2.1 Introduction of New Offline Form Manager

PerfectForms now offers the ability to create and manage form instances without the need for an Internet connection using the new Offline Form Manager.

Once a form has been downloaded, new instances can be created by the user. The new instance is added to the list of instances for each individual form. The user can designate a form as "Saved", "Completed" or "Submitted" and can return to edit any of the open form instances. Once the Offline Form Manger is able to connect to the server and the user has logged on, completed form instances can be submitted and uploaded.

[Offline Form Manager - Managing Forms](#)



## 2.2 New License Type for Offline Form Manager

A new Offline Users license type has been added for managing offline form access at the individual level. For an additional fee per user, customers can now add the ability for their users to access forms offline. ([Contact](#) a sales representative for details.)

To enable access to the Offline Form Manager application, the system administrator will need to turn on the **Enable offline form filling** option for each user. This is done on the Users view of the Settings Dashboard.

[License Information](#)

[License Information \(Offline Form Manager\)](#)

[Configuration and Security \(Offline Form Manager\)](#)

### Account License

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#### General

Package Name      Trial  
Expiry Date        Unlimited

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#### Limits

Description	Current	Limit	Status
Full Users	2	10	
Basic Users	1	50	
Offline Users	4	59	
Forms	62	100	
Reports	3	100	
Storage	13 Mb	50 Mb	

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#### Features

- Database Connections

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[Upgrade the Account](#)   [Refresh Storage](#)

## 2.3 New User Option for Managing Offline Form Filling

A new user option titled **Enable offline form filling** has been added to facilitate access to the Offline Form Manager application. If you want your users to have the ability to create and manage form instances offline, you will need to turn this option on for each user. This option is set within the User Details area of the Settings Dashboard.

[Creating a New User](#)

[Administering Users, User-Groups and Positions](#)

**User - John Jones**

**Personal**

Title: Mr. | ▾  
First Name: John  
Last Name: Jones  
Email: jjones@abc.com  
Language: English | ▾  
Active:

**Contact**

Phone: 888-888-8888  
Fax: 888-888-8881  
Cell Phone: 888-888-8882  
Skype:   
Alternate Email:   
Custom ID:   
→

**Role**

Full User  
View forms, reports and notifications and create, edit and manage:  
 Forms  Users  
 Reports  Account  
 Connections  External Portal  
 API

Basic User  
View forms, reports and notifications or go straight to this report:

Limited User  
No log-in allowed. Only interact with emails public links or Offline Form Manager.

**Offline**

Enable offline form filling

**Single**  
Domain  
**Address**  
Street  
City  
State  
Zip-code  
Country  
**Log-in**  
Last Log  
Failed Log  
Blocked

## 3 Connection Agent

### 3.1 Connection Agent Updated to Allow Setting a Higher Number of Rows Returned

The Connection Agent has been enhanced to allow users to set a higher limit into config.xml. If the config.xml does not contain an explicit limit, then the default of 1000 is used.

Connect behavior command has also been updated to enable users to set Max Records to maximum 999999999. The Connection Agent's limit will maintain higher priority. Because of this, when a request reaches the Connection Agent the maximum returned records cannot be higher than the limit that is set into config.xml, although PerfectForms users can still set it into the Properties dialog.

config.xml example:

```
<datasource name="Northwind" id="3" server="SHRP" port="1433" type="sqlserver">  
  <database name="Northwind" id="11" db="Northwind" user="sa" password="black" login="*" maxrecords="2500"/>  
</datasource>
```

In the above example the limit for maximum returned records was set to 2500.

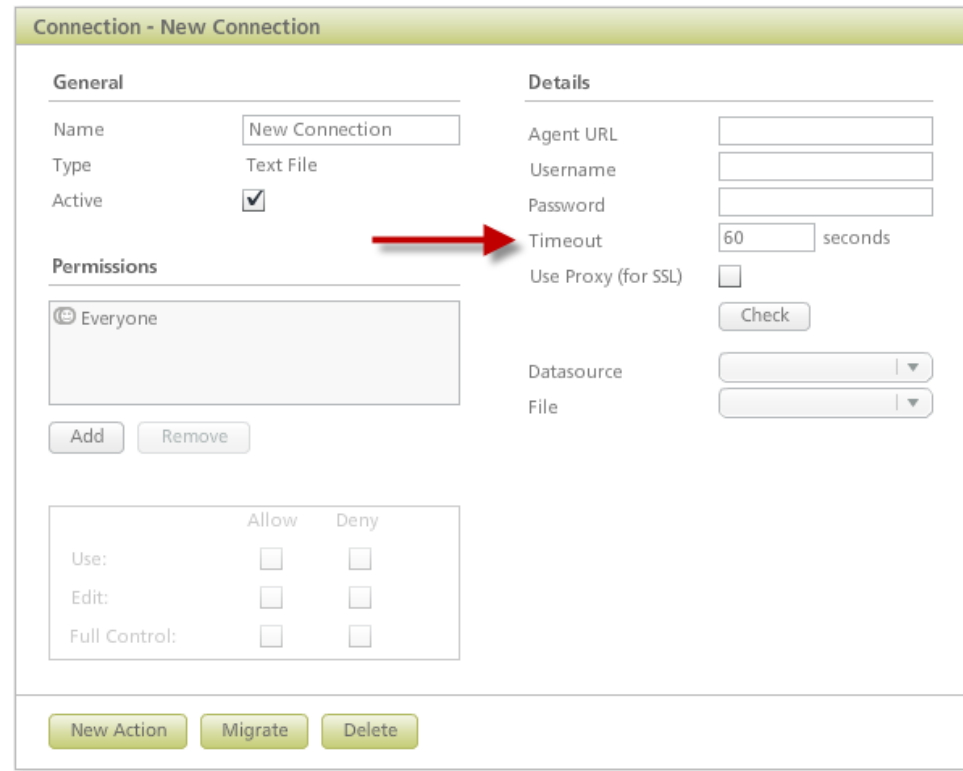
[Connection Agent Configuration Editor](#)  
[Config file](#)

### 3.2 New Connection Agent Timeout Setting

The Connection Agent has been enhanced to include a 60 second time-out default setting on all Connection Agent type connections.

Previously, the Connection Agent had a one minute time-out setting with a maximum of 1000 records (LDAP or CSV) returned. With this, connections were timing out if the query returned more than 500 rows. The new 60 second default setting ensures that the only limitation on the time-out is time, not number of records returned.

- [Installing the Connection Agent](#)
- [Database Connections](#)
- [Directory Services \(LDAP\) Connections](#)



The screenshot shows a 'Connection - New Connection' dialog box with the following fields and settings:

- General:**
  - Name: New Connection
  - Type: Text File
  - Active:
- Permissions:**
  - Everyone (selected)
  - Buttons: Add, Remove
  - Table:

	Allow	Deny
Use:	<input type="checkbox"/>	<input type="checkbox"/>
Edit:	<input type="checkbox"/>	<input type="checkbox"/>
Full Control:	<input type="checkbox"/>	<input type="checkbox"/>
- Details:**
  - Agent URL:
  - Username:
  - Password:
  - Timeout: 60 seconds (highlighted with a red arrow)
  - Use Proxy (for SSL):
  - Check:
  - Datasource:
  - File:

Buttons at the bottom: New Action, Migrate, Delete

## 4 Form Designer

### 4.1 'Send by Email' Option Moved to Message Tab

To accommodate better visibility for users, the Send by email option has been moved from the Edit Notifications > Email tab to the Message tab instead. This option, which now defaults to being selected, enables the e-mail server settings for the Notify behavior.

[Notify Command – Message Tab](#)

#### Previous Location:

Previous Location: The 'Edit Notifications' dialog box shows the 'Email' tab selected. The 'Send by email' checkbox is checked and circled in red. A red arrow points from this checkbox to the 'Message' tab in the 'New Location' screenshot.

#### New Location:

New Location: The 'Edit Notifications' dialog box shows the 'Message' tab selected. The 'Send by email' checkbox is checked and circled in red. The 'Subject' field contains 'Request Sent' and the 'Body' field contains 'Your request has been submitted and will be processed'.

Title	Attention Level	Role	Person	Time	Cancellation
Request Sent	No attention ne	Applicant	Applicant Email	Now	The instance's st
Request Waiting	Normal attentio	Manager	Manager Email	Now	The instance's st
Reminder of Res	High attention r	Manager	Manager Email	In 1 Working da	The instance's st

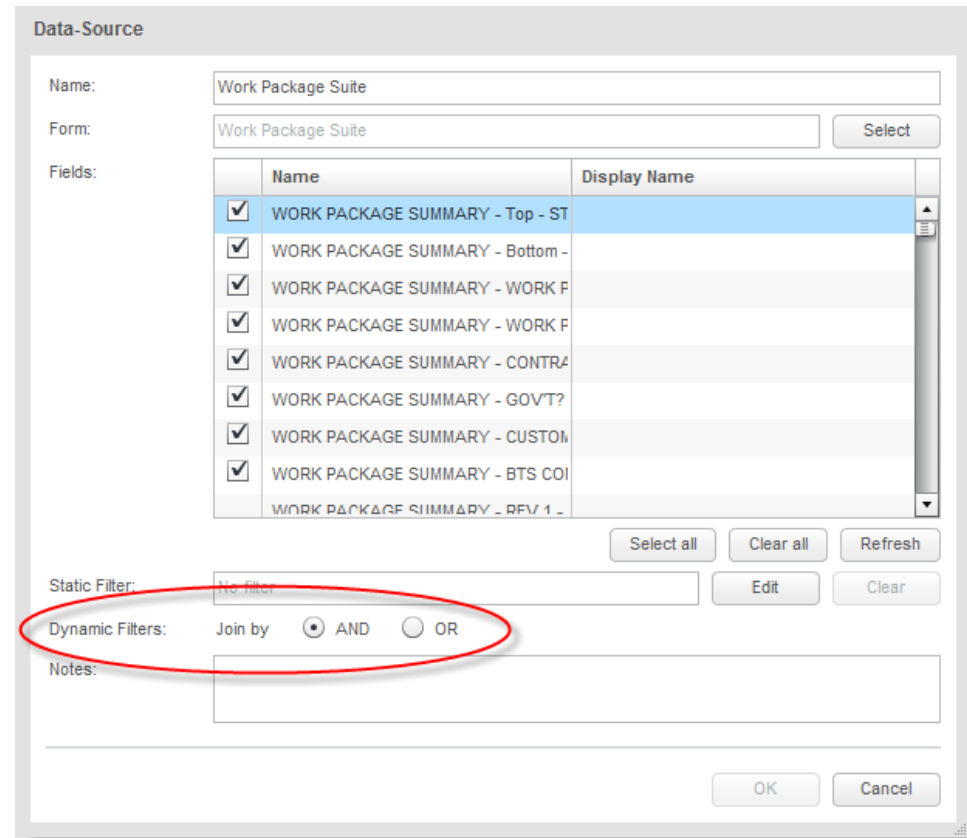
## 5 Report Designer

### 5.1 New 'Dynamic Filter' Field in Data-Source Dialog

The Report Designer's Data-Source dialog has been updated to include a new Dynamic Filters field. This field's option allows users to choose to join by **AND** or join by **OR**.

For example, if you have a report that includes types of cars as well as where they are from, and would like to filter on those two things, you can choose the **Join by AND** option to see all cars that are BMWs *and* all cars that are from France. If you instead choose **Join by OR** you will see a list that includes any cars that are BMWs *or* any cars that are from France.

[Adding a Datasource](#)



The screenshot shows the 'Data-Source' dialog box. The 'Name' field is 'Work Package Suite' and the 'Form' field is also 'Work Package Suite'. The 'Fields' section contains a table with the following data:

	Name	Display Name
<input checked="" type="checkbox"/>	WORK PACKAGE SUMMARY - Top - ST	
<input checked="" type="checkbox"/>	WORK PACKAGE SUMMARY - Bottom -	
<input checked="" type="checkbox"/>	WORK PACKAGE SUMMARY - WORK F	
<input checked="" type="checkbox"/>	WORK PACKAGE SUMMARY - WORK F	
<input checked="" type="checkbox"/>	WORK PACKAGE SUMMARY - CONTRA	
<input checked="" type="checkbox"/>	WORK PACKAGE SUMMARY - GOVT?	
<input checked="" type="checkbox"/>	WORK PACKAGE SUMMARY - CUSTOM	
<input checked="" type="checkbox"/>	WORK PACKAGE SUMMARY - BTS COI	
<input checked="" type="checkbox"/>	WORK PACKAGE SUMMARY - REV 1 -	

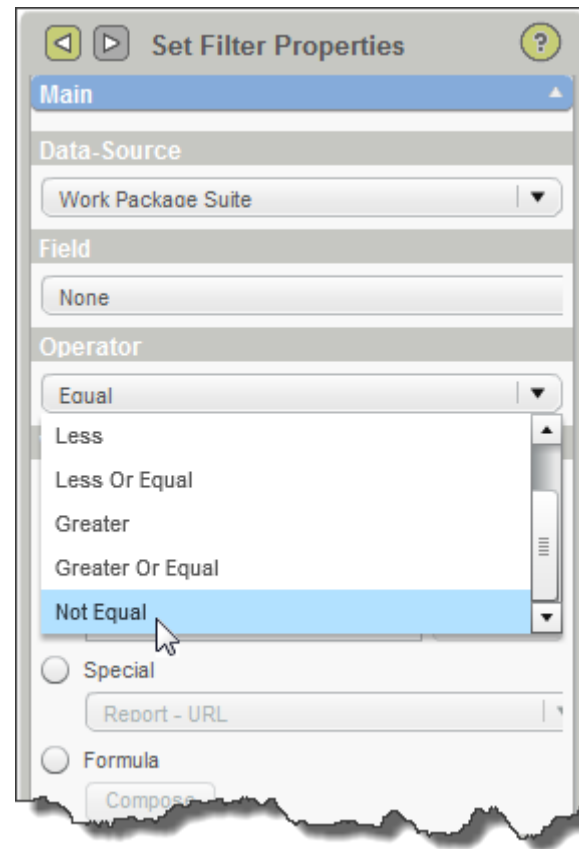
Below the table are buttons for 'Select all', 'Clear all', and 'Refresh'. The 'Static Filter' field contains 'No filter' with 'Edit' and 'Clear' buttons. The 'Dynamic Filters' section is circled in red and shows 'Join by' with a dropdown arrow, the 'AND' radio button selected, and the 'OR' radio button unselected. A 'Notes' text area is located below the 'Dynamic Filters' section. At the bottom right are 'OK' and 'Cancel' buttons.

## 5.2 'Not Equal' Option Added to List of Operators in Report Behaviors

A new option has been added to the list of available Operators in the Report Behaviors area of PerfectForms. The option titled Not Equal will enable users to filter items that are not equal.

For example, if a form has five stages and the report needs to show all stages except Stage 2, the new **Not Equal** operator can be chosen and the appropriate value specified in the Value area below.

[Adding Behaviors](#)

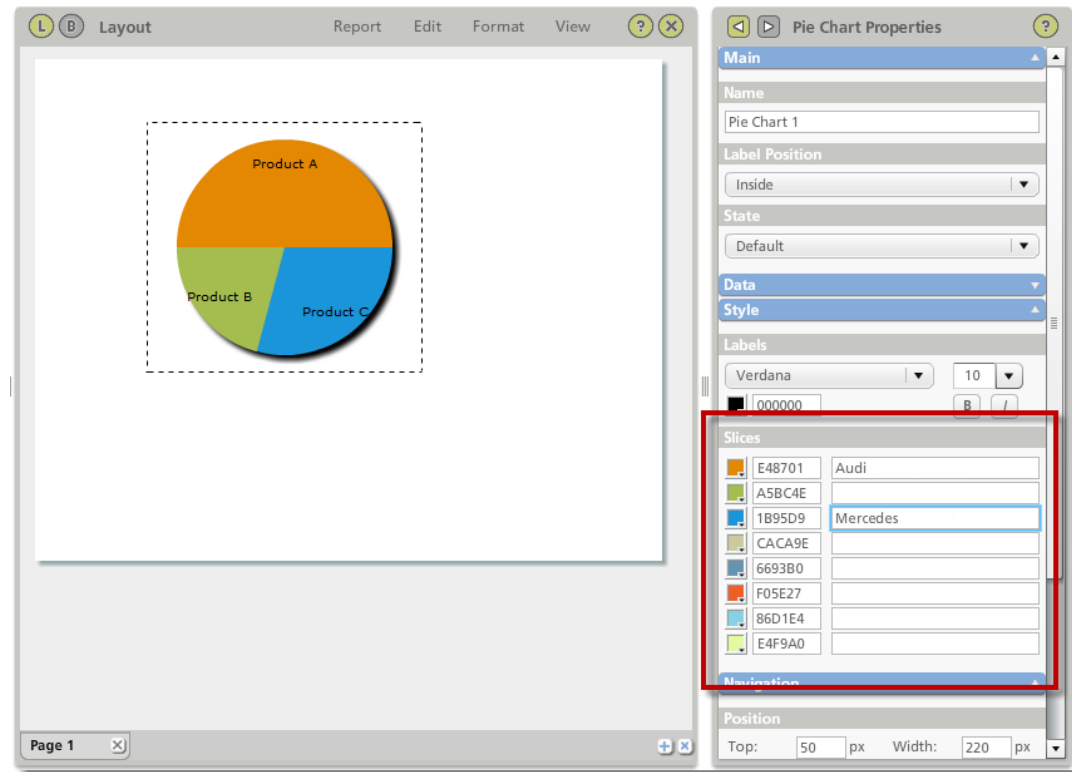


### 5.3 Ability to Assign Values to Pie Chart Slice Colors

The Pie Chart object within the Report Designer now offers the ability to assign a specific value to each pie slice color. If no value is assigned, the object works as it has previously where it takes the colors in the order shown in the Slices section of the Pie Chart properties.

For example, if your report includes certain types of imported cars such as Audis and Mercedes, you can assign these as values to the desired pie slice colors. In doing so, any other cars included in your report will default to the next available color in the order shown in the Slices area of the object properties.

[Reporting Object Reference](#)



## 6 System

### 6.1 New API Methods

The following are the new Account API methods that have been added to PerfectForms:

1. **DeleteFormInstance:** The new API method DeleteFormInstance allows API developers to delete form instances.
2. **GetFormInstanceData:** The new API method GetFormInstanceData returns a form instance's content in XML format.
3. **GetFormInstancePDF:** The new API method GetFormInstancePDF retrieves a form's instance PDF in a Base64binary format, ready to be written to file.
4. **GetListOfFormInstances:** The new API method GetListOfFormInstances retrieves a list of a form's instances.

[DeleteFormInstance API](#)

[GetFormInstanceData API](#)

[GetFormInstancePDF API](#)

[GetListOfFormInstances API](#)

[PerfectForms API](#)

## 7 Connections

### 7.1 SOAP Headers Allow Send Parameters

Web Service connection communication has been enhanced to allow Send parameters to appear in the header, instead of the body of the SOAP request.

The list of Send parameters is not automatically populated with Header parameters by querying the WSDL. They need to be added manually to the list and are differentiated from body parameters by adding a "\*" character at the beginning of the name. For example,

```
*username  
*password
```

[Web Services Connections](#)

## 7.2 Form Connection Permissions

PerfectForms has been enhanced to ensure that the owner of a form has the appropriate permissions to use a connection if it is used inside his or her form. If a Use Connection is included inside a form, the owner must have Use permissions on **both** the connection and its action used in the form.

In previous versions of PerfectForms, the connections used by an imported form would work regardless of the permissions set on them. This change in behavior was required to address a security issue that allowed using connections from an imported form even if the importer had no rights over the connection.

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Note: It is important to verify that your connections and forms have the correct permissions; otherwise it is possible that they could stop working after upgrade to 1.18.

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[Connection Permissions](#)

[Importing a Form File](#)

[Migrating and Importing a Connection](#)

## 8 Administration

### 8.1 New Maintenance Option in Administration Console

New functionality has been added to the Settings area of the Administration Console. By pressing the **Maintenance** button you can permanently delete data records from the database.

When a user deletes an item (e.g. Form, Form Instance, User) from the Dashboard, it is not actually removed from the database, it is only marked as “deleted”. This allows for recovery of deleted items in case of an inadvertent deletion (Undo). However, system administrators may want to permanently remove these “marked as deleted” data records from the database, resulting in benefits such as:

- freeing up space in the database
- a reduction in the amount of time maintenance tasks take to complete in the database
- a reduction in the number of IO reads in the database needed to return data.

To permanently remove items, enter the number of days that must have passed since the data records were marked as deleted. (It is recommended that you do not permanently remove items that have been recently deleted.)

[Settings](#)  
[Setting Maintenance Options](#)

The screenshot shows the 'Settings' page in the PerfectForms System Admin console. The page is divided into several sections: General, Account Sign-Up, and Email Server. The 'Maintenance' button is located at the bottom right of the settings area and is circled in red. The 'General' section includes fields for Application Root URL, Help Page URL, Library Enabled, Help Center Enabled, Upgrade URL, Upgrade Button, and Remote Monitoring of System Usage Enabled. The 'Account Sign-Up' section includes options for using built-in forms or forwarding to a custom URL, with fields for Title, Message, Terms and Cond. URL, Hook URL, and URL. The 'Email Server' section includes fields for Name, Server Type, Port, Requires SSL, Display Name, Email Address, Reply To Display Name, Reply To Email Address, Requires Authentication, Username, and Password. The 'Maintenance' button is located at the bottom right of the settings area.

The screenshot shows a dialog box titled 'Maintenance'. The text inside the dialog box reads: 'Permanently delete all items which have been marked as 'deleted' for more than 100 days.' The number '100' is in a text input field. At the bottom of the dialog box, there are two buttons: 'OK' and 'Cancel'.

## 9 List of Defects Resolved

The following reported bugs were resolved in PerfectForms™ version 1.18.

- 1032 Pie Chart using radio button group source is showing error
- 1409 When user is in form design and closes the browser (x button) for all other users the form becomes locked
- 1947 File Attachment: Cannot upload simultaneously
- 1954 Corner Radius drop down was changed
- 2003 Connect and Search command: 'show error messages' option is not relevant in this case
- 2031 Chain cancellation of notifications does not always work
- 2032 Cancel notifications of current notify command does not work with "other"
- 2132 Text Field truncates/removes ENDING 0 if number was set
- 2134 Connections: final 0's are truncated if the field contains only digits and "." Character; it is treated as numeric even if the field is a string type field.
- 2291 ConnectionAgent cannot connect to a SQLSERVER instance
- 2339 Right mouse click menu options 'Cut, Copy, Paste and Delete' are no longer available since upgrading Flash to 10.1.53.64
- 2345 Link Dialog - Selection of Window, Transparent, Opaque is kept when window is reopened
- 2346 Link dialog - "Use Single Sign On Gateway" option is kept
- 2352 Email address and subject are kept when the Test E-mail Server dialog is opened again
- 2363 Contextual menu in tree: Cut/Paste options no longer available after Flash player update
- 2439 Same user can open a form instance multiple times simultaneously
- 2522 QuickTour Video is not working when the account is newly created or a user is new
- 2557 Text input and Text area table columns do not have "Text" format available for selection