



# What's New in PerfectForms™ Version 2.0

Release Date: June 29<sup>th</sup>, 2011

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# 1 Archiving Form Instances

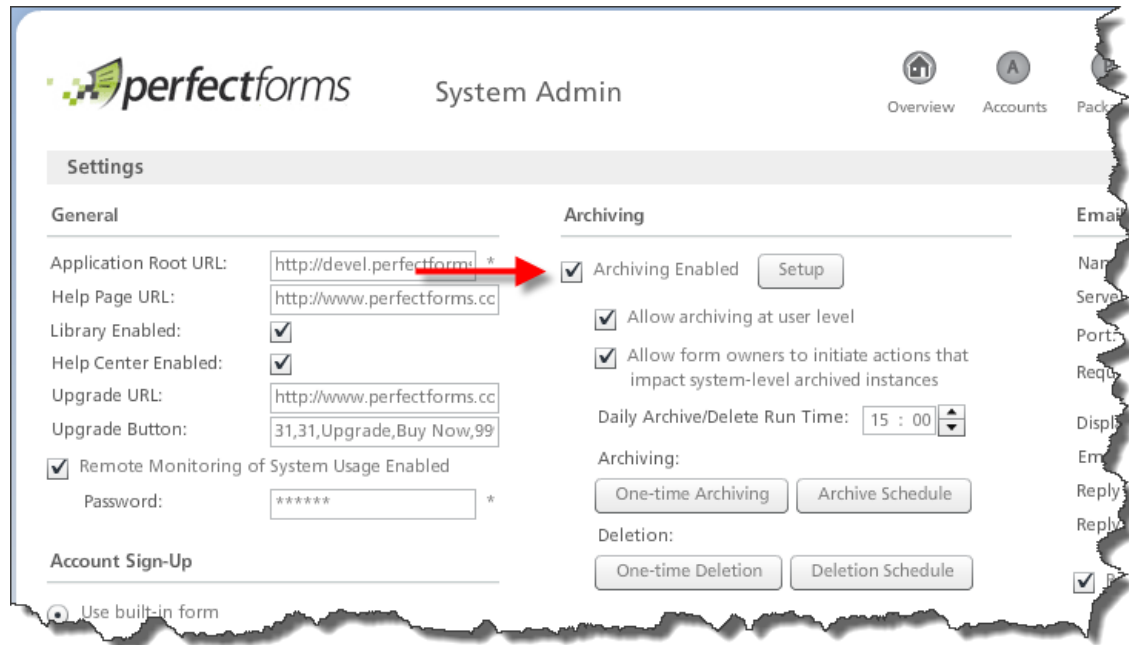
Archiving functionality has been added to the Administration Console as well as the PerfectForms application. This functionality enables you to move data from the main system database into a secondary database which can exist on a different host. This offers the following benefits:

- Reduces the size of data in the main database and improves its performance.
- Removes old data clutter from Dashboards and improves manageability of remaining data.
- Supports client-specific company archiving policies.

## 1.1 Archiving in the Administration Console

Archiving is enabled and configured in the Administration Console. System Administrators can manage archiving settings as well as initiate archiving actions such as one-time and scheduled archival or deletion of form instances.

[Administering Archiving Settings](#)



## 1.2 Archiving in the PerfectForms Application

The Archiving functionality in the PerfectForms application is available to Full users who have had the 'Archiving' option turned on in the Settings Dashboard > Users area. Once this option is turned on, users can then archive form instances, restore archived form instances and permanently delete archived form instances for forms on which they are the form owner.

[Archiving Settings](#)

The screenshot shows the 'New Archive' dialog box in the PerfectForms application. The interface includes a top navigation bar with tabs for Forms, Reports, Notifications, Connections, and Settings. A left sidebar contains a tree view with 'Account Settings', 'Archiving Settings', 'New Archive', 'Archived Instances', and 'Personal Settings'. The main area is titled 'New Archive' and contains a section 'Select Forms and Filters to Find Instances to Archive'. This section includes a list of forms with checkboxes: 'Absence Notice' (checked), 'Capital Expenditure' (checked), 'Contractor Time Tracking', 'Purchase Order', and 'Vacation Request'. To the right, there are filters for 'Status' (set to 'Any'), 'Name', and 'Date of' (set to 'First Submission'). Below these are radio buttons for 'Before', 'Between', and 'After', each with a date picker. A table below shows '2 Form Instances' with columns for Name, Form, Status, First Submission, and Last Submission. The table contains two rows: one for 'Harry Smith' (Absence Notice, Open, 27 Apr 2011 12:26) and one for 'Capex Type: Fixtures & Fittings | Kelli Th...' (Capital Expenditure, Open, 27 Apr 2011 12:25). At the bottom of the dialog are 'Apply' and 'Cancel' buttons.

Name	Form	Status	First Submission	Last Submission
Harry Smith	Absence Notice	Open	27 Apr 2011 12:26	27 Apr 2011 12:26
Capex Type: Fixtures & Fittings   Kelli Th...	Capital Expenditure	Open	27 Apr 2011 12:25	27 Apr 2011 12:25

## 2 Notifications

### 2.1 Mobile Access to Approval Forms

PerfectForms has added the ability to define a mobile approval form that users can access through their mobile device. This type of form helps facilitate a more efficient on-the-go approval process by allowing for quick approval or rejection of a specific request (such as a time sheet approval or vacation request).

Mobile approval forms can be accessed using mobile devices that are HTML 4/5 and JavaScript 1.5 compatible. This includes:

- iPhone 3 and 4
- Android 2.1 and 2.2
- Blackberry 4.6

[Mobile Approval Forms](#)

[Mobile Approval Form - Interactive Example](#)

Creation of Mobile Approval

Actual HTML Form Seen on Mobile Device

## 2.2 HTML in Notifications

PerfectForms now offers the capability to add HTML elements to the e-mail notifications sent for your forms. The HTML tab has been added to the Edit Notifications > Message tab. Here you can add formatting to your messages such as a specific type-face or font, a specific size for the font, bolding or italics.

[HTML in Notifications](#)  
[Notify Command - Message Tab](#)

The screenshot shows the 'Edit Notifications' dialog box. At the top, there is a table with the following data:

Title	Attention Level	Role	Person	Time	Cancellation
Manager Approval - Cc	Normal attention need	Manager	"Submit Time To" Drop-	Now	The instance's stage has chang
Timesheet Approval R	High attention needec	Manager	"Submit Time To" Drop-	In 1 Working days	The instance's stage has chang
ESCALATION TO COO -	Urgent attention need	COO	kthompsonpf@gmail.cor	In 5 Working days	The instance's stage has chang

Below the table are 'Add' and 'Remove' buttons. The dialog has several tabs: 'General', 'Person', 'Time', 'Cancellation', 'Message', and 'Email'. The 'Message' tab is selected. It contains a checked 'Send by email' option and a 'Subject' field with the text 'Manager Approval - Contractor Timesheet Submitted'. There are 'Text' and 'HTML' buttons for the message body. The 'HTML' button is selected, and the body contains the following HTML code:

```
<br/>
<p><b>Note</b></p>
<p>{field name="Name" id="8GUQ7AAAtFQAAKQ4AADm0cnApo4="} has submitted a time sheet for your review and approval
Click {link} to review the details and take action on the time sheet.</p>
<p>Regards</p>
<p><i>John Smith</i></p>
```

At the bottom of the dialog are 'OK' and 'Cancel' buttons. There are also buttons for 'Insert Field', 'Insert Link', 'Insert Form Instance Number', and 'Add Mobile Approval'.

### 2.3 Ability to Send Notifications on a Specific Date Based on a Formula

The “Time” tab of the Edit Notifications dialog enables you to select a time in which your notifications should be sent. This tab now provides you the ability to send your notification based upon a date derived from a formula established on the Compose Formula dialog.

[Notify Command - Time Tab](#)

The screenshot shows the 'Edit Notifications' dialog box with the 'Time' tab selected. The dialog has a table at the top listing notifications, followed by 'Add' and 'Remove' buttons. Below the table are tabs for 'General', 'Person', 'Time', 'Cancellation', 'Message', and 'Email'. The 'Time' tab is active and contains the following options:

- Now
- On a specific date [calendar icon]
- On a date taken from a field [text input] [Select]
- After a fixed period [text input] [Minutes] [dropdown]
- After a period taken from a field [text input] [Select] [Minutes] [dropdown]
- On a date taken from a formula [Compose]

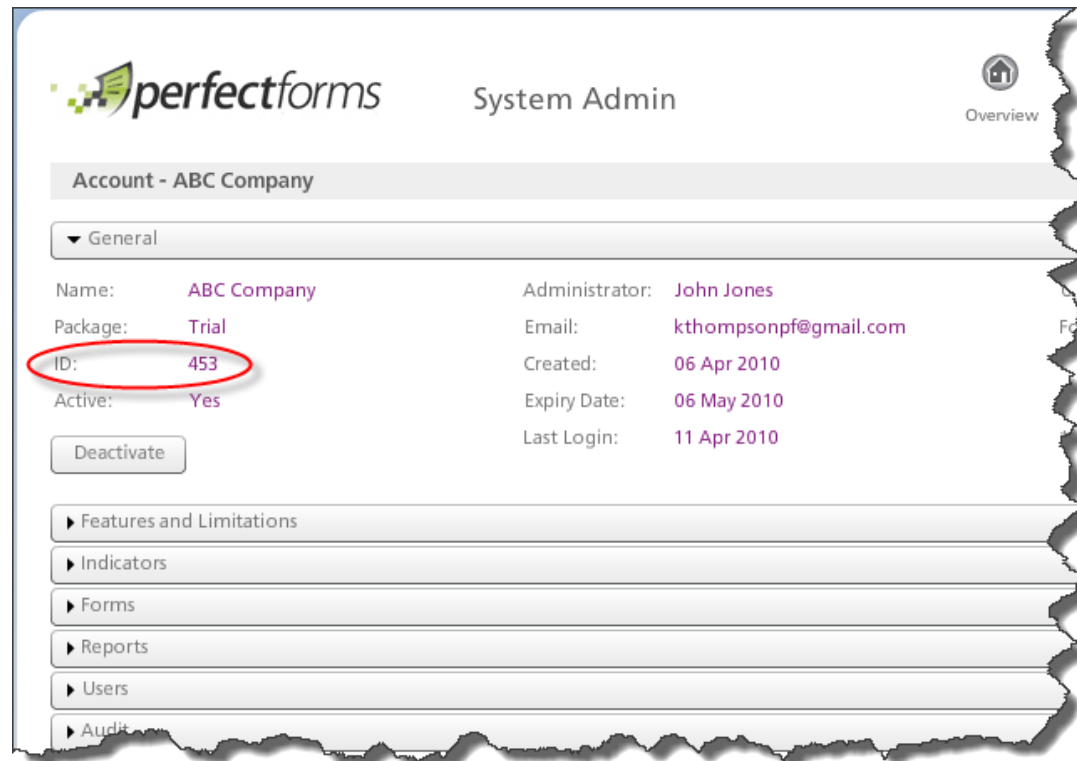
At the bottom of the 'Time' tab, there is a checkbox:  Cancel all other notifications of the instance when this notification is sent. At the very bottom of the dialog are 'OK' and 'Cancel' buttons.

### 3 System and Account Administration

#### 3.1 Addition of Account ID Field in Administration Console

The Account ID has been added to the “General” section of the Accounts page in the Administration Console. Visibility to this ID will enable quick reference capabilities to match accounts with Lead data and eProcessing data. Previously, the only way to access the Account ID was to export then search through the exported file.

[Accounts](#)



The screenshot displays the 'perfectforms System Admin' interface. At the top, there is a logo for 'perfectforms' and a 'System Admin' title. A home icon and 'Overview' link are in the top right. Below this is a header for 'Account - ABC Company'. A 'General' section is expanded, showing the following details:

Name:	ABC Company	Administrator:	John Jones
Package:	Trial	Email:	kthompsonpf@gmail.com
ID:	453	Created:	06 Apr 2010
Active:	Yes	Expiry Date:	06 May 2010
		Last Login:	11 Apr 2010

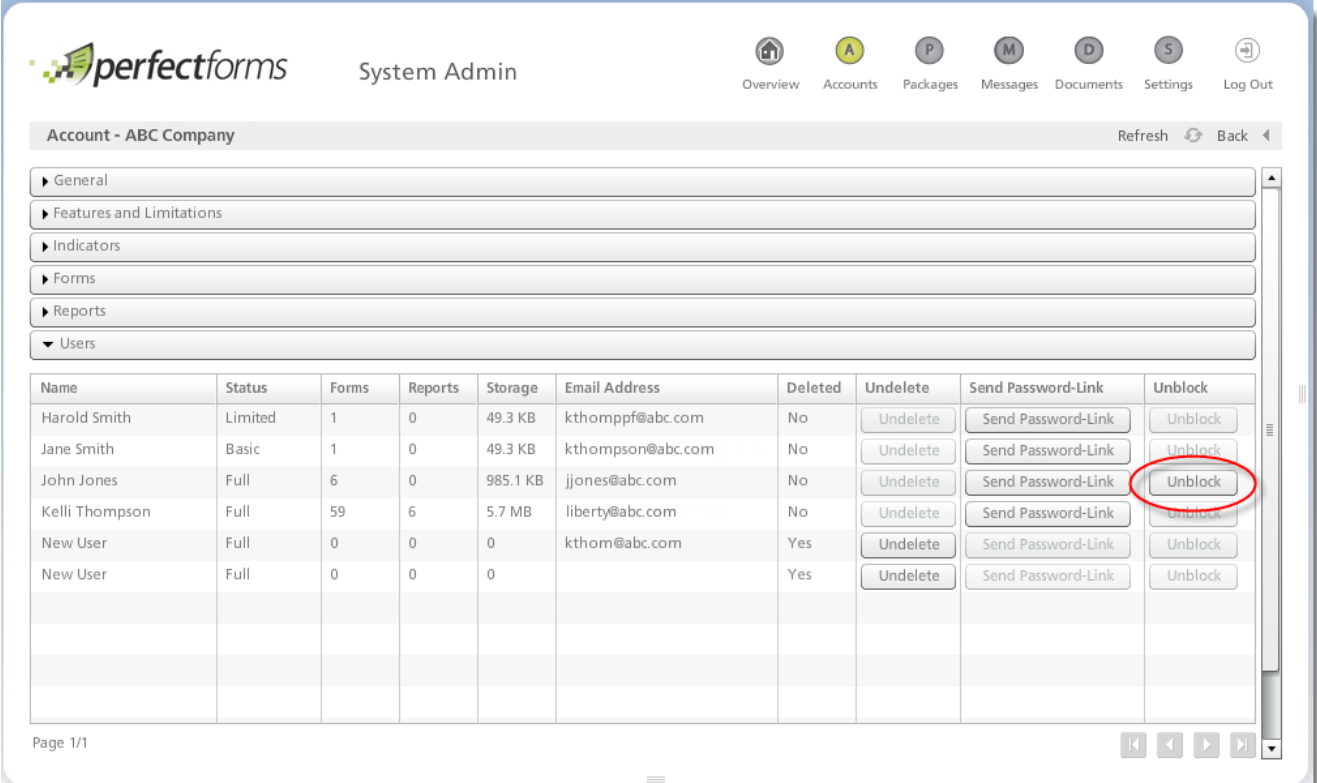
A 'Deactivate' button is located below the details. Below the details are several expandable sections: 'Features and Limitations', 'Indicators', 'Forms', 'Reports', 'Users', and 'Audit'.

### 3.2 Ability to Unblock a User through the Administration Console

If the “Block User After X Failed Attempts” option in the PerfectForms application has been enabled on the Account Settings page, you may occasionally need to unblock a user. Previously, this capability was only available to Account Administrators within the PerfectForms application.

PerfectForms now offers the capability to unblock users through the Administration Console. A column titled “Unblock” has been added to the table found on the Account > Users page. The System Administrator can locate the name of the blocked user and click the “Unblock” button to allow that person to once again log into the PerfectForms application.

[Unblocking a Locked-Out User through the Administration Console](#)



The screenshot displays the PerfectForms System Admin interface. At the top, there is a navigation bar with icons for Overview, Accounts, Packages, Messages, Documents, Settings, and Log Out. Below this, the page title is "System Admin" and the account name is "Account - ABC Company". A sidebar on the left contains expandable menu items: General, Features and Limitations, Indicators, Forms, Reports, and Users. The main content area shows a table of users. The table has columns for Name, Status, Forms, Reports, Storage, Email Address, Deleted, Undelete, Send Password-Link, and Unblock. The user "John Jones" is highlighted, and the "Unblock" button in the last column of his row is circled in red. The "Undelete" button for "John Jones" is disabled, indicating he is a deleted user.

Name	Status	Forms	Reports	Storage	Email Address	Deleted	Undelete	Send Password-Link	Unblock
Harold Smith	Limited	1	0	49.3 KB	kthomppf@abc.com	No	Undelete	Send Password-Link	Unblock
Jane Smith	Basic	1	0	49.3 KB	kthompson@abc.com	No	Undelete	Send Password-Link	Unblock
John Jones	Full	6	0	985.1 KB	jjones@abc.com	No	Undelete	Send Password-Link	Unblock
Kelli Thompson	Full	59	6	5.7 MB	liberty@abc.com	No	Undelete	Send Password-Link	Unblock
New User	Full	0	0	0	kthom@abc.com	Yes	Undelete	Send Password-Link	Unblock
New User	Full	0	0	0		Yes	Undelete	Send Password-Link	Unblock

### 3.3 Ability to Store File Attachments as Individual Files in the File System

Historically, all file attachments that are added to a form-instance using the “File Attachment” form object have been stored in the PerfectForms database as “Blobs”. The system has been enhanced to now offer the System Administrator the ability to choose whether or not to store the file attachments as Blobs in the PerfectForms database or as individual files in the file system. Benefits for storing as individual files include:

- Keeping the size of the database small
- Easier access to file attachments files (without going through the product UI)
- Ability to distribute storage between different machines

[File Attachment Storage Settings](#)

The screenshot shows the 'perfectforms System Admin' interface. The 'Settings' page is divided into several sections: 'General', 'Account Sign-Up', 'Archiving', and 'File Attachment Storage'. The 'File Attachment Storage' section is highlighted with a red circle. It contains two radio buttons: 'Store in Database' (unselected) and 'Store in File System' (selected). Below these is a text input field for 'File System Path' containing 'D:\PFAssets\Devel' and a 'Migrate' button. The 'General' section includes fields for 'Application Root URL', 'Help Page URL', 'Library Enabled', 'Help Center Enabled', 'Upgrade URL', and 'Upgrade Button'. The 'Account Sign-Up' section has radio buttons for 'Use built-in form' (selected) and 'Forward to custom URL', with various text input fields for form details. The 'Archiving' section has a checked 'Archiving Enabled' checkbox and several sub-sections for archiving and deletion settings.

### 3.4 Ability to Change the “Admin” User of an Account

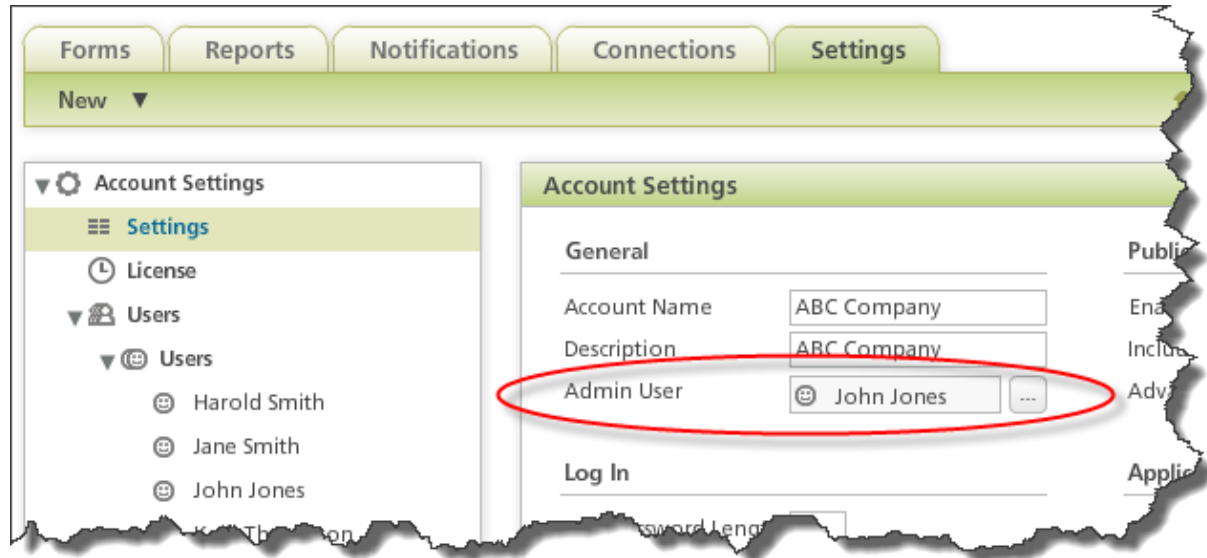
PerfectForms now offers the ability to change the “Account Administrator” user for an account. This will help alleviate issues such as when a staffing change occurs and the need is presented for a new Account Administrator.

When a new account is established in PerfectForms, the detail provided in that initial enrollment is automatically used to create the first user in the account (also known as the account owner). This user is then designated as the “Account Administrator” and listed as the “Admin User” on the Account Settings page of the Settings Dashboard. The Account Administrator user has special privileges. For example, this user cannot be deleted and receives account limit warning emails.

To change the Account Administrator, the current Admin User can now access the Account Settings page and transfer that title to another user by selecting the ellipses button and choosing another user from the Select User dialog.

[Settings](#)

[Assigning Account Administrator Permissions](#)



### 3.5 Ability to Create Account and User-Level Folders in the View Forms/Reports Areas of the Application

PerfectForms now offers the ability to organize forms and reports for which the user has “View” permissions into Account and Personal folders inside the View Forms and View Reports tree nodes. Previously, the View Forms and View Reports areas simply listed the items in a single-level hierarchy without folders. Now, users may categorize and organize the forms/reports as needed.

To establish account-level folders, the user must be a Full User and have the “Folders” option turned on in the Account Settings > User Details area. Items added to Account folders will be visible to all users in the account. Items added to Personal folders will only be visible to the user who created them.

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

[Organizing Forms](#)

[Organizing Reports](#)

User - John Jones

**Personal**

Title: Mr. (dropdown)  
First Name: John  
Last Name: Jones  
Email: jjones@abc.com  
Language: English (dropdown)  
Active:

**Contact**

Phone: 888-888-8888  
Fax: 888-888-8881  
Cell Phone: 888-888-8882

**Role**

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

Basic User  
View forms, reports and notifications or go straight to this report:  
[ ] [Select] [Clear]

Limited User

Forms Reports Notifications Connections Settings

New Import

Form  
Folder  
Personal  
Account

**View Forms Dashboard**

**View Recent**

- Call Javascript Function Example
- Tables Example
- Absence Notice
- Contractor Time Tracking
- HTML Demo 1
- Vacation Request
- Change of Major Request
- New Form

**Information**

Forms are used to collect data. Fill in a new instance of a form, or browse for an existing instance and re-open it to view or amend its data.

### 3.6 More Secure Enforcement of Password Strengths

PerfectForms now offers Account Administrators the ability to apply more stringent requirements on passwords established by their users. Through the Account Settings page in the Settings Dashboard of the PerfectForms application, you may now assign a minimum password length. You may also select the type of characters available for the passwords including: Any, Alpha and Digits, or Alpha/Digits/Special.

[Settings](#)

#### Account Settings

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##### General

Account Name

Description

Admin User  ...

##### Log In

Min. Password Length

Password Characters  ▼

Block user after  failed logins

Force password change after  days

##### Single Sign-On

Enabled

Gateway URL

Password

Only allow log-in if domain authenticated

##### Public User Sign-up in Player

Enabled

Include Custom ID

Advanced Options

##### Application Programming Interface (API)

Enabled

IP Addresses

##### Misc

Enable external portal access

Use alternative upload mechanism

Allow basic user to edit own details

Allow edit of user's email address

Use system font

Show form instances by permission

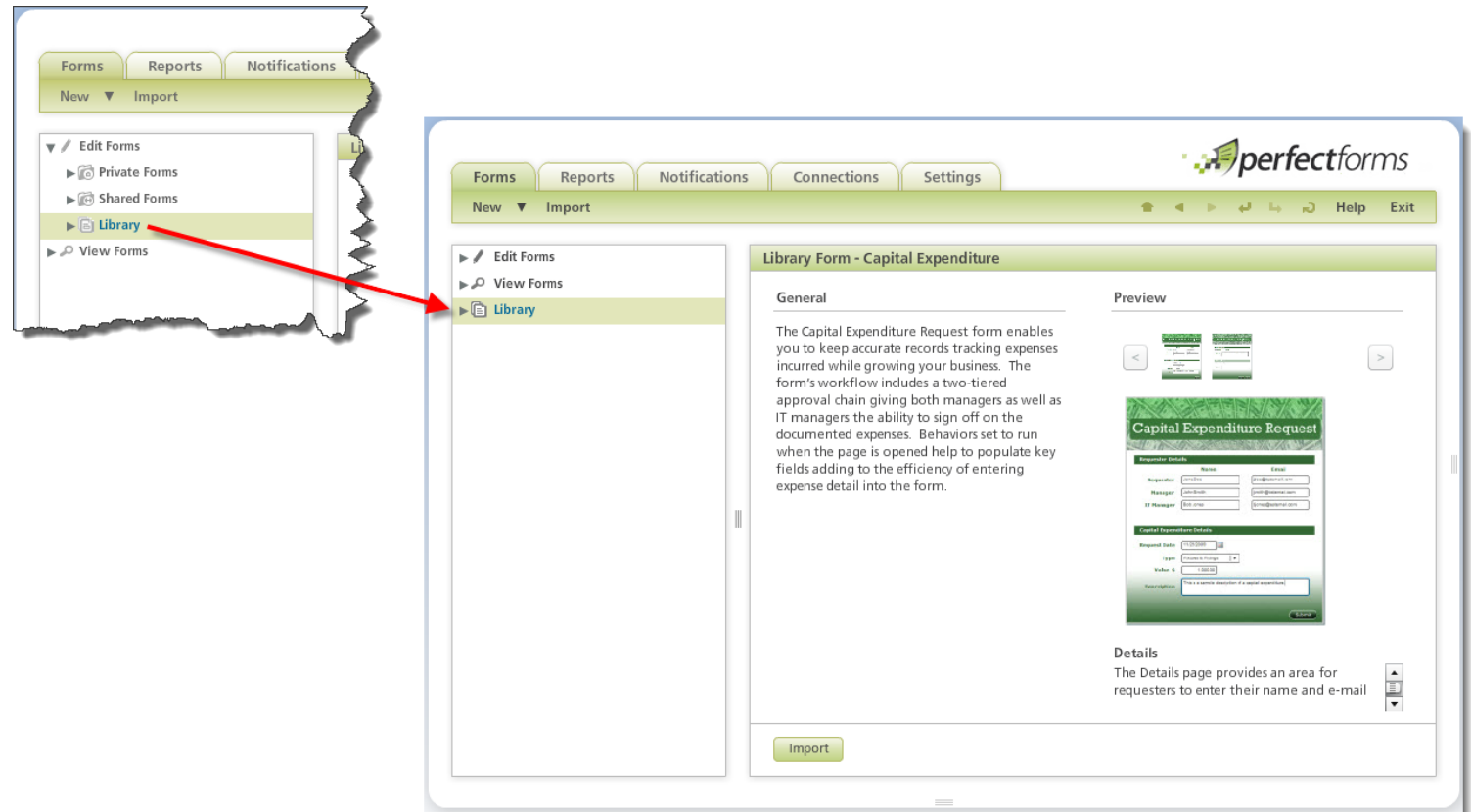
## 4 Location of Forms Library in Edit Forms Dashboard

### 4.1 Forms Library Location

The forms library provides form samples for your users to choose from when creating forms. Users can preview the form design and import it into their own accounts and then edit the design as needed.

The “Library” folder located in the Forms Dashboard has been moved from within the Edit Forms node out to the same level as the Edit Forms and View Forms nodes. This provides users with easier access and better visibility to the forms library.

[Importing a Form from the Forms Library](#)



## 5 Form Designer

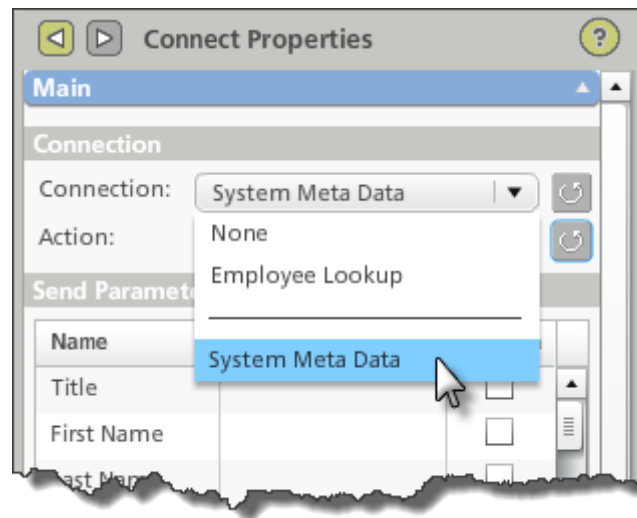
### 5.1 System Meta Data Connection

A new connection is now available that enables form designers to access Users, User-Groups and Positions lists from within their forms. This connection is accessed through the Properties bar of a “Connect” or “Connect and Search” behavior command. It is automatically made available to each form with no additional setup needed through the Connections Dashboard.

[System Meta Data Connection](#)

[Connect Properties](#)

[Connect and Search Properties](#)



## 5.2 Setting a Drop-Down List Value to “Empty” through Connect Commands

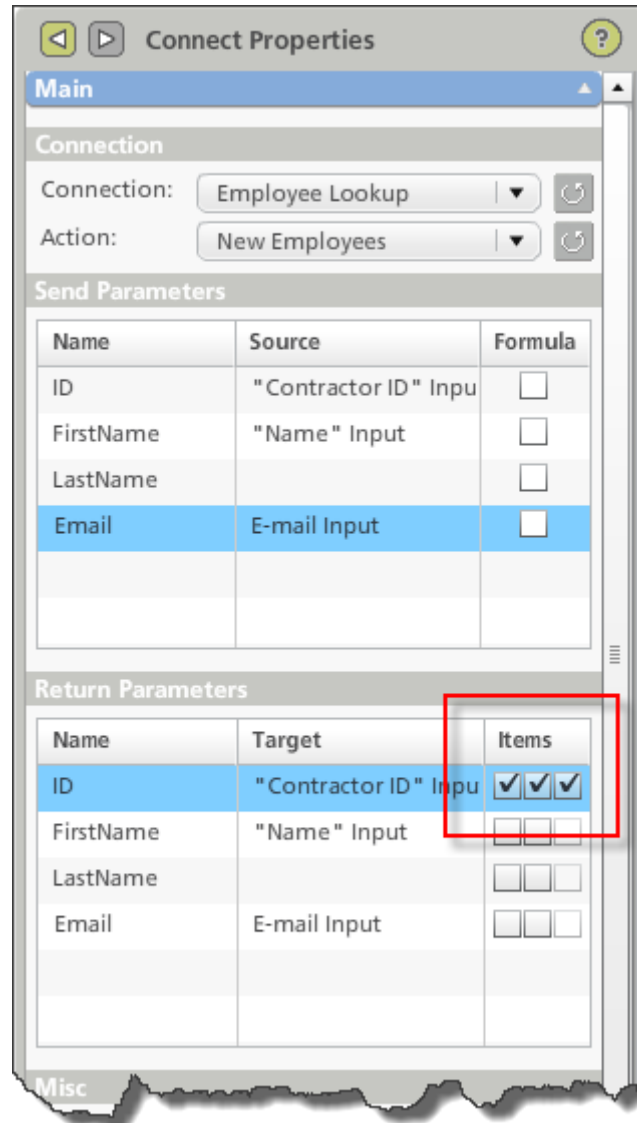
The “Connect” and “Connect and Search” behavior commands have been enhanced to include a new check box in the Items column of the Properties bar. This new check box allows form designers to set drop-down list values to “Empty” by default.

When specifying a list or drop-down object as the object to return the data to, there are three check boxes available for selection. The options are as follows:

- Select the first check box to populate the caption.
- Select the second check box to populate the value.
- Select the third check box to tell the system that for the drop-down object, none of the items in the list should be selected by default. This check box is only enabled after either the first or second check box in the Items column is selected.

[Connect Properties](#)

[Connect and Search Properties](#)



### 5.3 Extra Row of Information in Search Window for Null Field

The PerfectForms system has been enhanced so that if the search for a Connect and Search command returns any records for which all displayed columns have empty values, the dialog will no longer display a completely empty row. Now, this row will be skipped and will not display at all.

[Creating PerfectForms Connections](#)

[Defining Connection Actions](#)



## 5.4 Increase to the Maximum Number of Behavior Commands

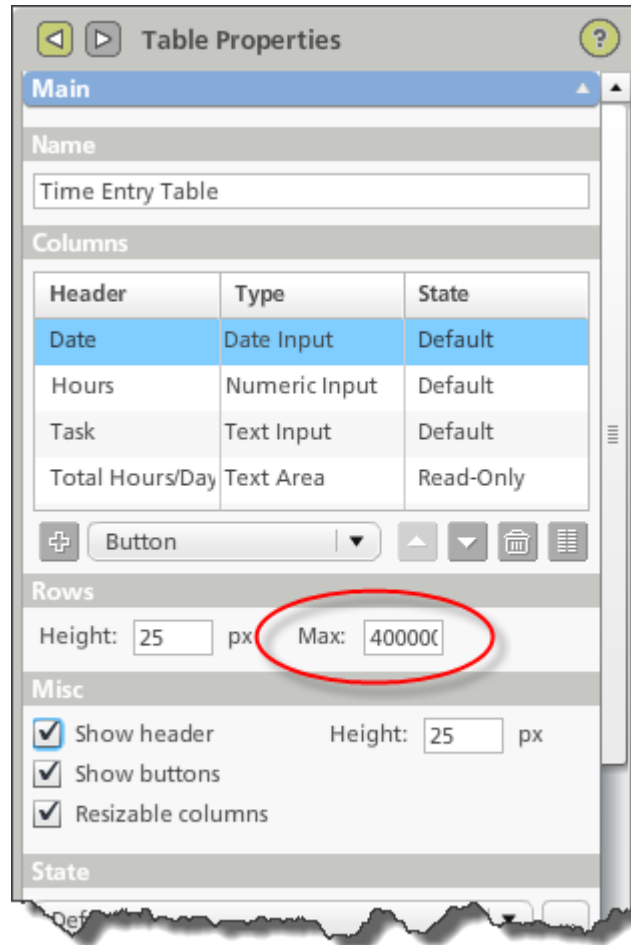
In previous versions of PerfectForms, the maximum number of commands that were executed in a sequence of a single behavior was 500. This requirement was in place to prevent an endless loop from locking the form or report in question. After the maximum number of commands was executed, the behavior would simply stop executing. The maximum limit has now been increased to 250,000 commands per behavior.

[How Behaviors are Triggered](#)

## 5.5 Increase to the Maximum Number of Rows Allowed in a Table

The Max Rows property for tables has been enhanced to allow a maximum of 400,000 rows in a table.

[Table Properties](#)



The screenshot shows the 'Table Properties' dialog box for a table named 'Time Entry Table'. The 'Columns' section contains a table with the following data:

Header	Type	State
Date	Date Input	Default
Hours	Numeric Input	Default
Task	Text Input	Default
Total Hours/Day	Text Area	Read-Only

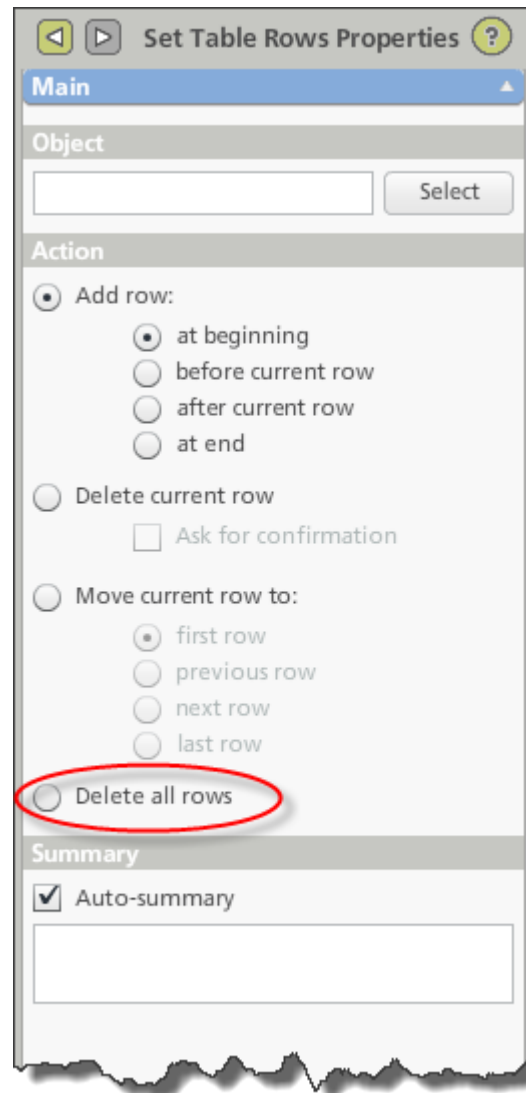
The 'Rows' section shows 'Height: 25 px' and 'Max: 400000', with the 'Max' value circled in red. The 'Misc' section has three checked options: 'Show header', 'Show buttons', and 'Resizable columns'. The 'State' section is partially visible at the bottom.

## 5.6 Delete All Rows of a Form Table

The Set Table Rows behavior command has been enhanced to include a property called “Delete all rows”. This option, when selected, will effectively delete all rows in the table when the Set Table Rows command runs.

[Set Table Rows Properties](#)

[Working with Tables - Interactive Example](#)

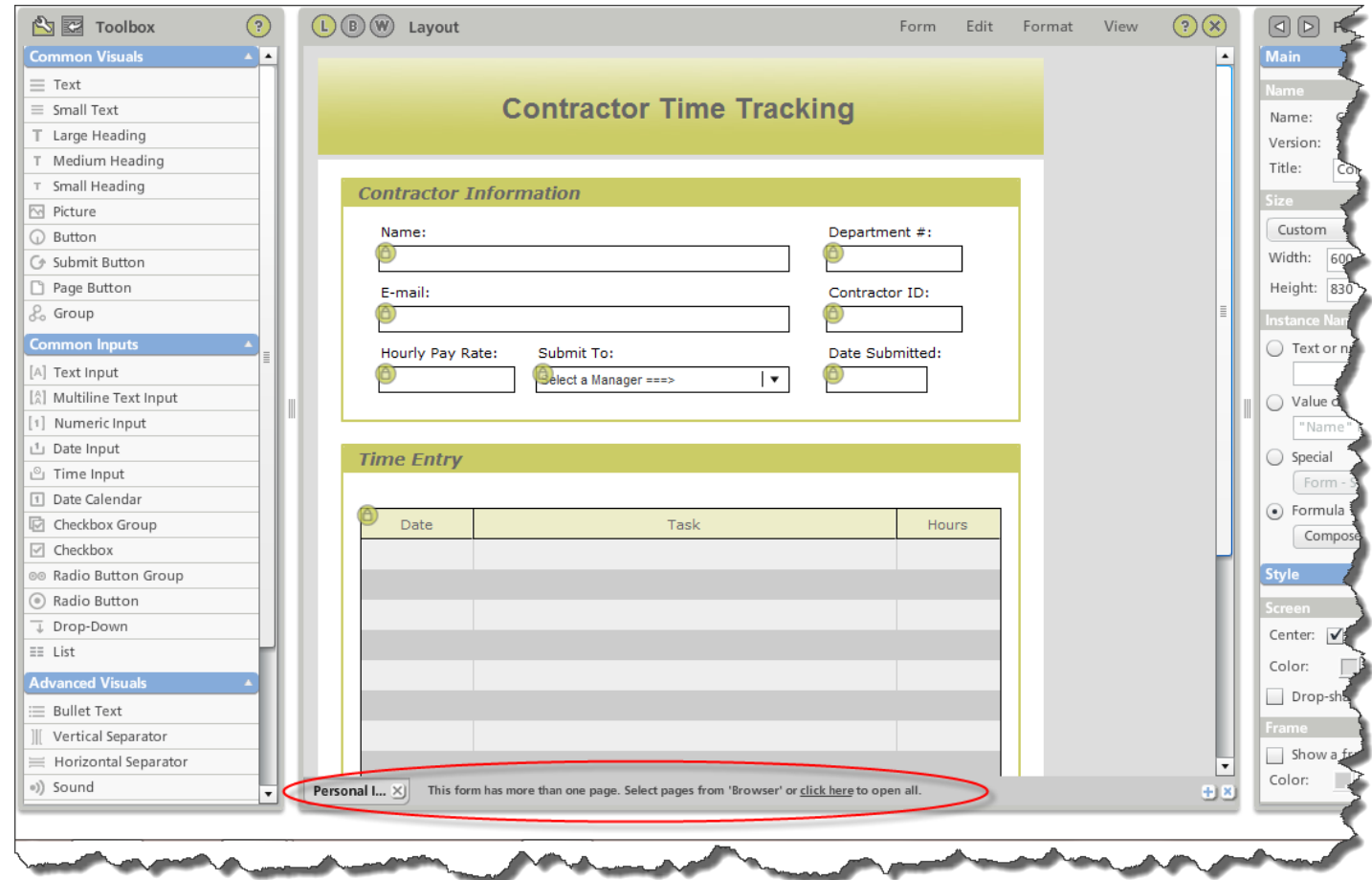


The image shows a screenshot of the 'Set Table Rows Properties' dialog box. The dialog has a title bar with navigation arrows and a help icon. Below the title bar is a 'Main' tab. The 'Object' section contains an empty text box and a 'Select' button. The 'Action' section has several radio button options: 'Add row:' (selected), 'Delete current row', and 'Move current row to:'. Under 'Add row:', there are four sub-options: 'at beginning' (selected), 'before current row', 'after current row', and 'at end'. Under 'Delete current row', there is a checkbox for 'Ask for confirmation'. Under 'Move current row to:', there are four sub-options: 'first row' (selected), 'previous row', 'next row', and 'last row'. The 'Delete all rows' option is circled in red. The 'Summary' section has a checked checkbox for 'Auto-summary' and an empty text box below it.

## 5.7 One-click Opening of All Form Pages

The Form Designer now offers the capability to quickly open all the pages of your form with a single click. On entry to the Form Designer, the first page of the form will be opened by default. At the bottom of the Canvas area to the right of that first page, the following text will display: *“This form has more than one page. Select pages from ‘Browser’ or [click here to open all.](#)”*

[Form Designer Overview](#)

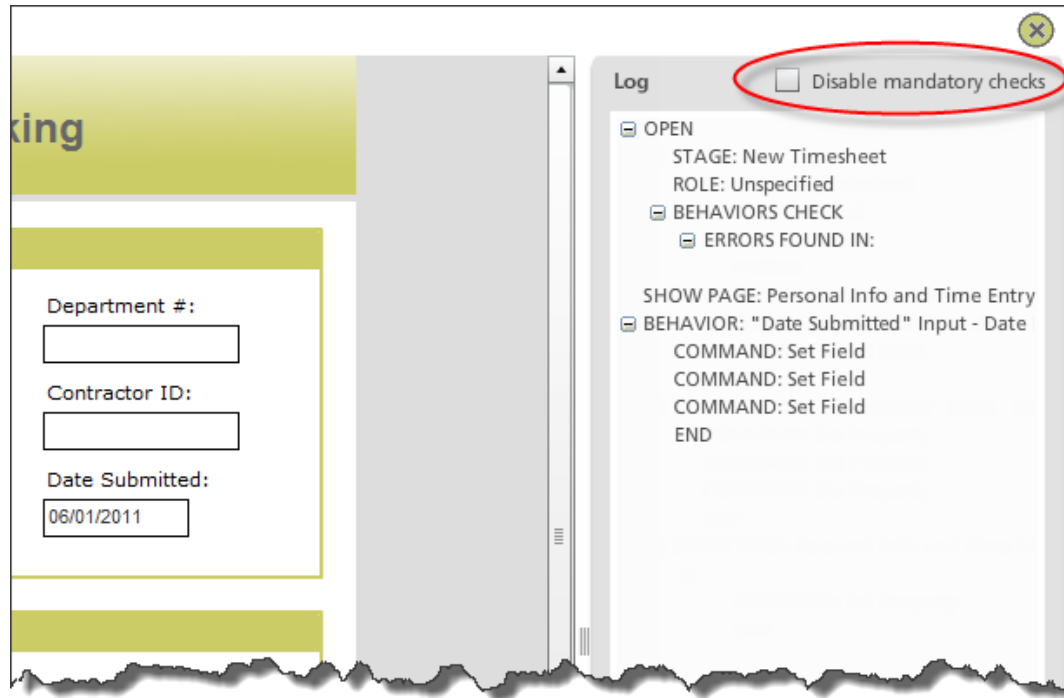


## 5.8 New Option for Suspending Mandatory Checks during Debugging

Selection of the “Debug” option from the “Form” menu in the Form Designer loads a preview of the form with an additional details panel. This panel shows behaviors and their results as each one is initiated by events in the form instance.

A new option has been added to this details panel that allows you to disable and effectively suspend the mandatory field verifications while the debug process runs.

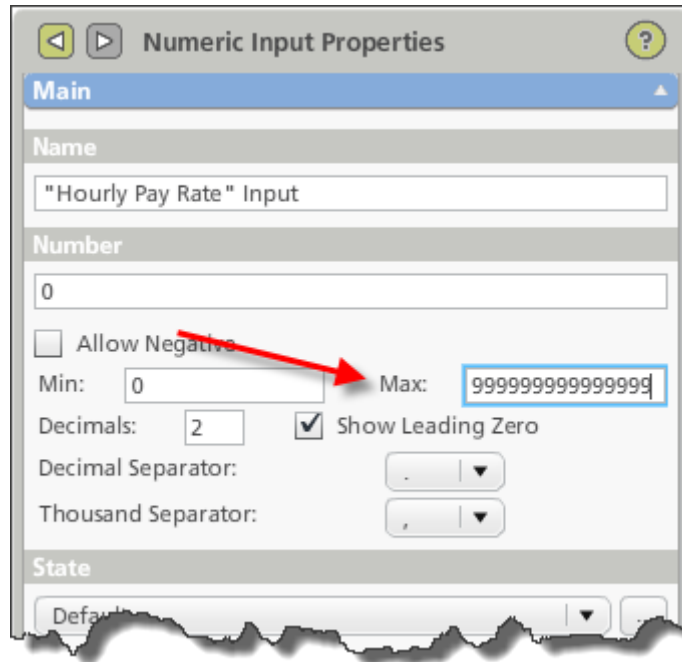
[Form Designer Menu Options Reference](#)



## 5.9 Increase to the Max Character Input for the Numeric Input Object

The Numeric Input object now allows form designers to set the max number of characters to 15 characters. You may choose to include a decimal or not (use all 15 digits), as long as the number of characters does not exceed 15.

[Numeric Input Properties](#)



The screenshot shows the 'Numeric Input Properties' dialog box. The 'Name' field contains '"Hourly Pay Rate" Input'. The 'Number' field contains '0'. The 'Allow Negative' checkbox is unchecked. The 'Min' field contains '0' and the 'Max' field contains '999999999999999'. The 'Decimals' field contains '2' and the 'Show Leading Zero' checkbox is checked. The 'Decimal Separator' is set to '.' and the 'Thousand Separator' is set to ','. The 'State' field is set to 'Default'.

## 6 List of Defects Resolved

The following items were resolved in PerfectForms™ version 2.0.

- 233 Appearance of drop-down table column in scripting: no Value and Caption options
- 1903 Player: Drop-Down object shows data by value
- 2208 Print issue on Safari
- 2566 Drop-Downs changing captions
- 2714 Mask input: The border is not appearing in Printing
- 2735 Settings : Users > Can't change the Role of a basic user to full user although the limit for maximum full users isn't reached
- 2746 Print issue with date format in a data list
- 2764 Notification email spacing issue
- 2787 Web service connection: Send parameters do not auto-populate
- 2810 Notifications from deleted form instances still being sent by e-mail and to Notifications Dashboard
- 2820 Date difference function returning value of year
- 2862 ConnectionAgentConfigurator doesn't save type="sqlserver" (default) for new added datasources in one particular case"
- 2867 Connect and Search window can't be used if screen resolution is 800X600
- 2870 Time/Date Format ignored in notifications
- 2875 XML special characters in POST/GET parameter breaks connection
- 2878 Changes in the datasource are not reflected in the objects of the report unless the fields are re-selected again
- 2893 Filter selector doesn't reflect changes to radius settings when viewing preview/published version
- 2901 "AND" character can't be sent as a parameter between forms
- 2920 Client does not trigger time-out event from the connection settings and hangs in loading screen
- 2922 Numeric input table column: Data not sent correctly when the table has a scroll bar
- 2945 Connections: Action field parameters visually disappear if you change something in a imported connection
- 2946 PerfectFormsService.exe.config file settings not saved if special characters used

- 2948 In IIS 7 the setting for API 's application pool should be Pipeline mode Classic
- 2955 AD Synchronize UniqueID must be binary type
- 2960 Date Add does not work with negative values, if wd parameter is used
- 2966 Printing does not work on Internet Explorer on installations with https
- 2970 Display name in browser tab
- 2974 1.18 Printing not working with Internet Explorer 6
- 2978 Page turning effect won't allow "page is opened" behavior
- 2982 Unclear message if not Active user tries to Change Password
- 2987 Error when adding the first email server through Admin Console
- 2991 Import and administer 120,000 users
- 2994 Snap to grid in 1.18: Behavior commands and workflow stages are not centered any more
- 2996 Behaviors shift position after the form was saved
- 3003 Copy/pasting simple branch will switch the branches
- 3022 Filter Selector: Translation error in the standalone player:<\$\$empty>
- 3041 Login from player : \$\$\$server\_error\_19 error message displayed when you try to login to a form for which you don't have permissions
- 3140 Make application work with stateful firewalls
- 3295 Personal Details: 'Keep me logged in' option does not work