



What's New in PerfectForms™ Version 2.1

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1 System and Account Administration

1.1 New role: Publish

A new role has been added in the Account Settings, Full User section that will enable system administrators to control individual users' ability to publish forms and reports.

If the Publish check-box is not checked then the publish button will be disabled for that user.

[Creating a New User](#)

Role

Full User

View forms, reports and notifications and create, edit and manage:

<input checked="" type="checkbox"/> Forms	<input checked="" type="checkbox"/> Users
<input checked="" type="checkbox"/> Reports	<input checked="" type="checkbox"/> Account
<input type="checkbox"/> Publish	<input type="checkbox"/> External Portal
<input checked="" type="checkbox"/> Connections	<input type="checkbox"/> API
<input type="checkbox"/> Folders	<input checked="" type="checkbox"/> Archiving

1.2 Activate or deactivate users through the administration console

Users may be activated and deactivated from the Accounts section of the system administration console.

[Activate or Deactivate Users](#)

The screenshot displays the 'System Admin' interface for the account 'Roberta Chang'. The 'Users' section is expanded, showing a table of users. The 'Deactivate' button for the user 'Dave Evans' is highlighted with a red box.

Name	Status	Forms	Reports	Storage	Email Address	Created	Activate	Undelete	Password	Unblock
Dave Evans	Basic	0	0	0	devans@demo.com		Deactivate	Undelete	Send	Unblock
Ian Taylor	Basic	0	0	0	itaylor@demo.com		Deactivate	Undelete	Send	Unblock
Roberta Chang	Full	1	0	3.5 KB	rchangpf@gmail.com		Deactivate	Undelete	Send	Unblock

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Full Export

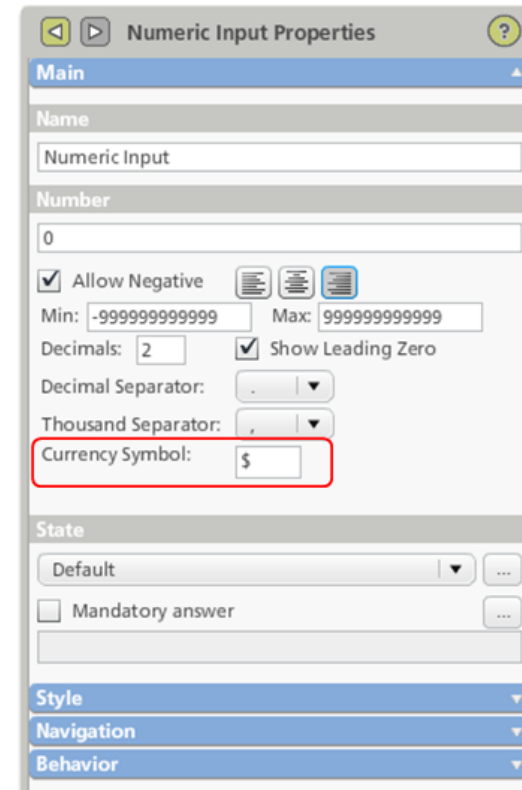
Audit

2 Form Designer

2.1 Numeric Input Object includes currency format option

Numeric input object and numeric input columns in a table object have the option to specify a currency symbol in the object.

[Numeric Input Properties](#)



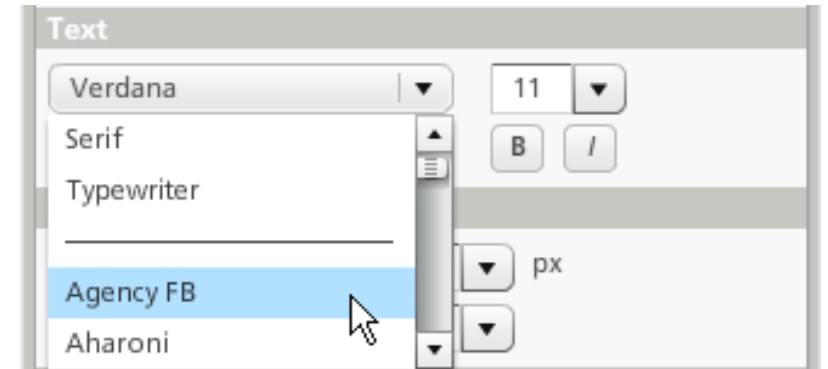
The image shows a screenshot of the 'Numeric Input Properties' dialog box. The dialog is titled 'Numeric Input Properties' and has a 'Main' tab selected. The 'Name' field contains 'Numeric Input'. The 'Number' field contains '0'. There are three icons for number formatting: a list, a list with a minus sign, and a list with a plus sign. The 'Allow Negative' checkbox is checked. The 'Min' field contains '-999999999999' and the 'Max' field contains '999999999999'. The 'Decimals' field contains '2'. The 'Show Leading Zero' checkbox is checked. The 'Decimal Separator' is set to '.'. The 'Thousand Separator' is set to ','. The 'Currency Symbol' field is highlighted with a red box and contains '\$'. The 'State' section has a 'Default' dropdown menu and a 'Mandatory answer' checkbox. The 'Style', 'Navigation', and 'Behavior' sections are collapsed.

2.2 Local machine font options added

In form/report editor mode, any objects which have a font property (i.e. text, text input) shall have the option to specify fonts from the local (designers) machine.

Note: The font can only be rendered if the user also has the font installed on their machine. If font is not installed then a standard font will be displayed.

[Text Properties](#)



2.3 File Attachment object: Filter options

A new File Types section has been included in the File Attachment Properties.

The form designer may specify which types of files may be attached or they may specify which file type extensions are allowable.

From the drop-down select file types:

- Default – All file types
- Text Documents
- Image files
- Custom: Designer must specify which file type extensions are allowed.

If the Custom option is selected enter the allowable extensions in the box below the drop-down. Extensions, without the period, must be separated by commas. i.e. pdf, jpg, gif

[File Attachment Properties](#)

The screenshot shows the 'File Attachment Properties' dialog box. The 'File Types' section is highlighted with a red box. It contains a dropdown menu set to 'Default' and a text input field for 'Custom Extensions'. Other sections visible include 'Main', 'Name', 'File', 'Button Labels', 'Button Position', and 'State'.

2.4 Numeric input object includes alignment

Data in numeric input fields and numeric input columns in a table object can be aligned to the left, centre or right.

[Numeric Input Properties](#)

The image shows a 'Numeric Input Properties' dialog box with the following sections and options:

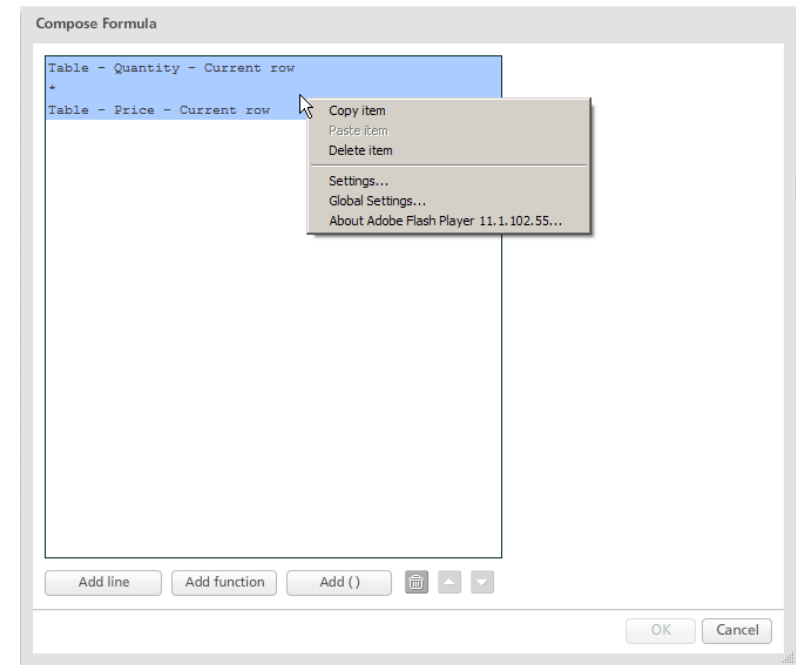
- Main**: Name: Numeric Input
- Number**: Value: 0
- Allow Negative (Three alignment icons: left, center, right are highlighted with a red box)
- Min: -999999999999 Max: 999999999999
- Decimals: 2 Show Leading Zero
- Decimal Separator: .
- Thousand Separator: ,
- Currency Symbol: [Empty]
- State**: Default (dropdown), Mandatory answer (checkbox)
- Style** (dropdown)
- Navigation** (dropdown)
- Behavior** (dropdown)

3 Behaviors

3.1 Copy, Paste or Delete in the Formula and Condition Editor

Copy, paste and delete functionality has been added to the Formula and Condition Editor.

[Using the Formula and Condition Editor](#)

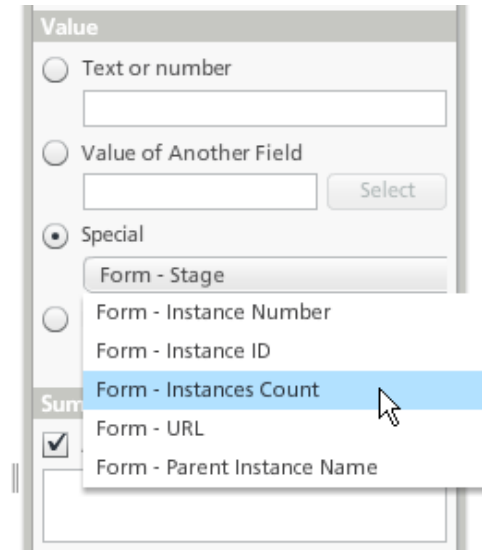


3.2 Special variable: Count Instances

A new variable has been added to the list of special variables.

This will show the number of instances that have been submitted for the current form at the time that the current instance was opened.

http://www.perfectforms.com/Documentation/manual/html/?special_fields_properties.htm



The image shows a 'Value' dropdown menu with the following options:

- Text or number
- Value of Another Field
- Special
 - Form - Stage
 - Form - Instance Number
 - Form - Instance ID
 - Form - Instances Count** (highlighted by a mouse cursor)
 - Form - URL
 - Form - Parent Instance Name

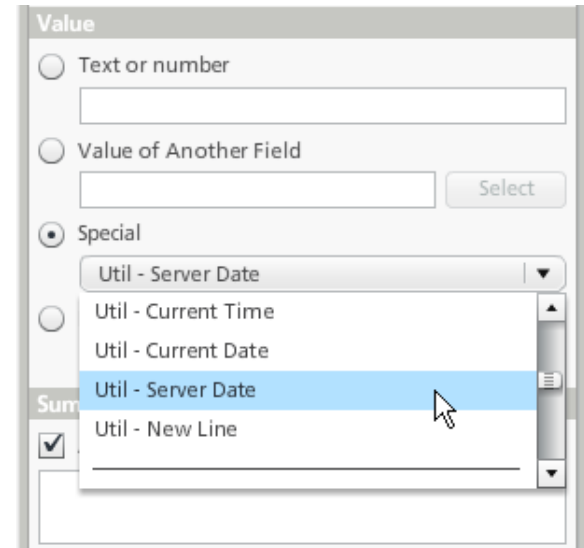
Below the 'Value' menu, there is a 'Sum' section with a checked checkbox and a text input field.

3.3 Special variable: Server Date

A new variable has been added to the list of special variables.

This will show the server date. Use this variable along with the existing functions to obtain other date related variables such as year, month, day etc.

http://www.perfectforms.com/Documentation/manual/html/?special_fields_properties.htm



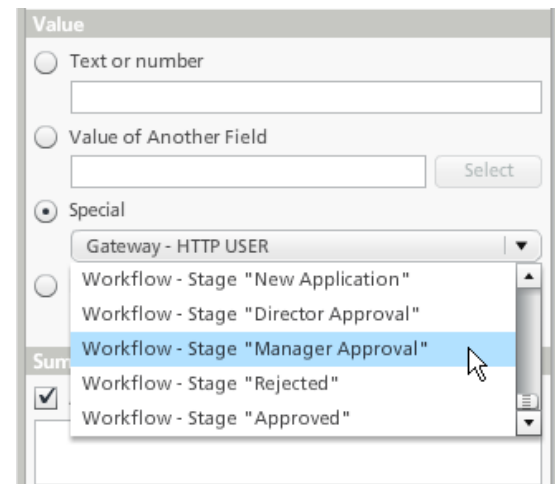
3.4 Special variable: Workflow Stages

All possible workflow stages have now been added to the Special variable list.

Specific stages may now be included in conditions and if the stage name is changed the condition will automatically change.

Note: If a workflow stage is deleted and replaced with another stage bearing the same name, then the links between the stage and existing conditions will be lost.

http://www.perfectforms.com/Documentation/manual/html/?special_fields_properties.htm

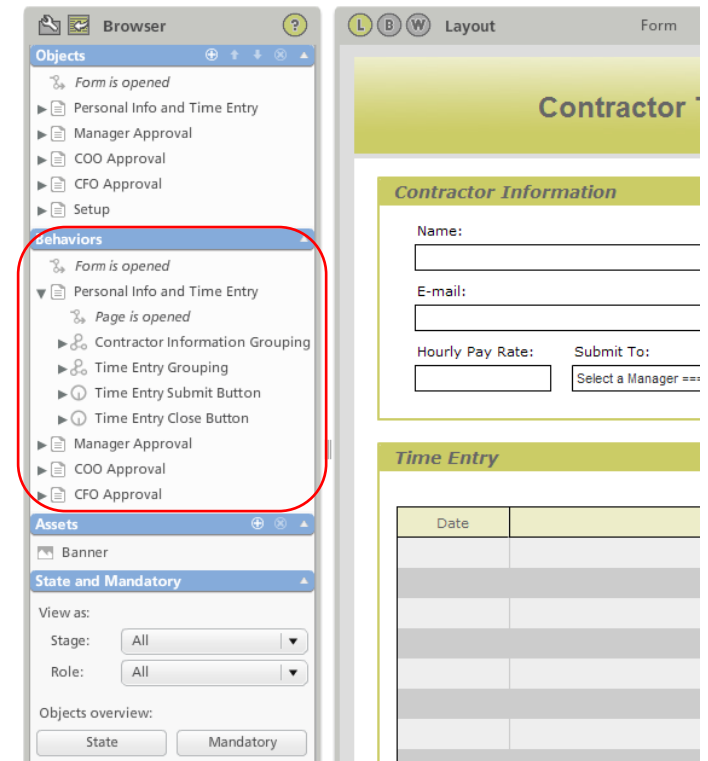


3.5 Behaviors Overview

A new section is included in the Browser pane called Behaviors. This new section will be seen in Form and Report design mode.

Listed in this section you will only see objects that have behaviors attached to them along with the behaviors. Browse to select behaviors which may also be renamed.

[Form Toolbox and Browser Bar](#)



4 Workflow

4.1 Repeat Notifications

Repeat notifications may be specified in a single command in the Notify object. Notifications will repeat until the current stage changes.

[Notify Command - Time 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 - C	Normal attention need	Manager	"Submit Time To" Dr	Now	The instance's stage ha
Timesheet Approval R	High attention need	Manager	"Submit Time To" Dr	In 1 Working days	The instance's stage ha
ESCALATION TO COO -	Urgent attention need	COO	Add Email	In 5 Working days	The instance's stage ha

Below the table are 'Add' and 'Remove' buttons. The dialog has several tabs: 'General', 'Person', 'Time', 'Cancellation', 'Message', and 'Email'. The 'Time' tab is selected. Under the heading 'Send the notification:', there are several radio button options:

- Now
- On a specific date [calendar icon]
- On a date taken from a field [input field] [Select]
- After a fixed period [input field] [Minutes] [dropdown]
- After a period taken from a field [input field] [Select] [Minutes] [dropdown]
- On a date taken from a formula [Compose]
- Until the next stage is reached every [input field] [Minutes] [dropdown] (highlighted with a red box)
- Cancel all other notifications of the instance when this notification is sent

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

5 Integration

5.1 Connect & Search: Title and message (instructions) can be displayed in the search dialogue popup

A title and Instructional text message can be entered in the miscellaneous section message box of the Connect & Search command.

The title and message will be displayed in the search dialogue popup.

[Connect & Search Properties](#)

Connect and Search Properties

Main

Connection

Connection: Northwind Example

Action: SELECT Customers

Send Parameters

Search	Name	Source	Formula
<input type="checkbox"/>	CustomerID		<input type="checkbox"/>
<input type="checkbox"/>	CompanyName		<input type="checkbox"/>
<input type="checkbox"/>	Contact		<input type="checkbox"/>
<input type="checkbox"/>	ContactTitle		<input type="checkbox"/>
<input type="checkbox"/>	Address		<input type="checkbox"/>
<input type="checkbox"/>	City		<input type="checkbox"/>

Return Parameters

Show	Name	Target	Items
<input type="checkbox"/>	CustomerID		<input type="checkbox"/>
<input type="checkbox"/>	CompanyName		<input type="checkbox"/>
<input type="checkbox"/>	Contact		<input type="checkbox"/>
<input type="checkbox"/>	ContactTitle		<input type="checkbox"/>
<input type="checkbox"/>	Address		<input type="checkbox"/>
<input type="checkbox"/>	City		<input type="checkbox"/>

Misc

Title: Search

Number of rows per page: 100

Width: 650 px Height: 550 px

Message:

Summary

Auto-summary

5.2 Send and return parameters may be ordered in a connection action.

Send and return parameters may be ordered in the lists by using the Up and Down arrows.

http://www.perfectforms.com/Documentation/manual/html/?defining_connection_actions.htm

The screenshot displays the 'Action - Employee Info' configuration window in PerfectForms 2.1. The interface includes a navigation bar with tabs for Forms, Reports, Notifications, Connections, and Settings. The main window is divided into several sections:

- General:** Name: Employee Info, Type: SELECT, Active:
- Permissions:** Everyone (Add, Remove buttons)
- Details:** Database Table: Demo_co_data
- Send Parameters:** A table with columns Name and Database Table Column. The Last_Name row is highlighted in green. The Up and Down buttons are circled in red.
- Return Parameters:** A table with columns Name and Database Table Column. The Last_Name row is highlighted in green. The Up and Down buttons are circled in red.
- Distinct values only:**

At the bottom of the window, there are Test and Delete buttons.

5.3 Webservice Connection Action – Use of Namespaces in Send Parameters

In Webservice Connection Actions it is now possible to include namespaces in send parameters.

[Web Services Connections](#)

6 List of Defects Resolved

The following reported bugs were resolved in PerfectForms™ version 2.1.

2.0.2 Installer doesn't support upgrade properly. The installer hangs when used
ANSI Characters not working with Connection agent
Audit export returns error
Call JavaScript - The application crashes when losing the focus from Function field using tab
Drop down problems related to repeated values
Error when trying to access the application
Form or Report Print has poor quality of image
Gateway - HTTP USER will not work when the form is opened using reporting meta-link
Numeric Input convert to text input problem
Import library form: Show and select new form in tree
Mask Input: The content of the object can be deleted when the state is Read Only
Migration Tool: After importing the backup, the Show Form commands are not working anymore
Refresh Button for Get Field and Set Field in Other Instance Properties
Screenshot uploaded for library forms pages are not displayed
Setup database mirroring, we need to setup the connection string from the installer and use encryption
Show Form Command: Error appears when New Window option is not checked
SSL Connections do not work with Chinese Character
States of table columns not holding based on scroll bar
System Admin: Scroll issue in "System Admin" when resizing the browser window
Webservices with namespace feature was not sending attributes values to web service