



What's New in PerfectForms™ Version 4.0

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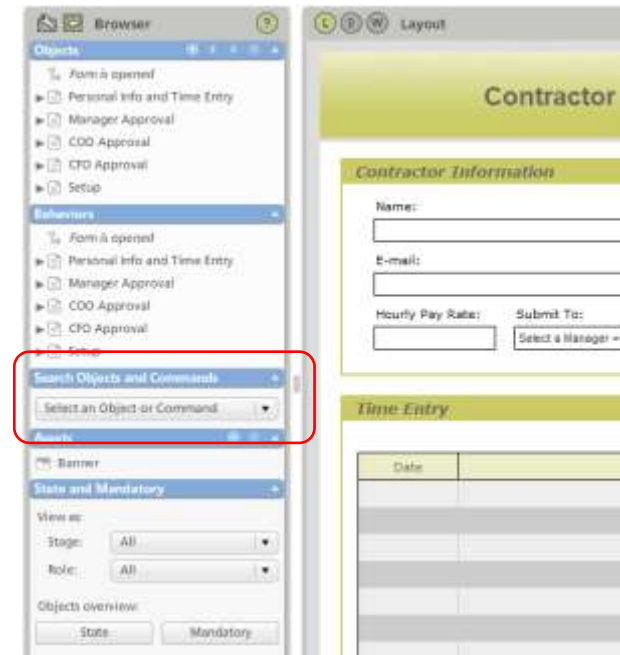
1 Form & Report Layout

1.1 Searching for objects or commands

From the Browser panel a new feature is added to allow a search for occurrences of specific layout objects or behavior objects in a form or report.

In a report this also includes specific reporting objects.

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



1.2 Restricting File Types in the File Attachment Object

Only certain file types may be attached to a form using the File Attachment Object.

File types restricted to:

- Video (AVI, MOV, MP2, MPEG)
- Image (JPG, JPEG GIF, PNG)
- Document (DOC, DOCX, XLS, XLSX, XLSM, CSV, TXT & PDF)
- PerfectForms (PF)
- HTML (HTM, HTML)
- Other (EML, LOG, MSG, PPT, PSD, PUB, VSF, XML))

As a consequence of this change the 'Custom' option is removed.

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

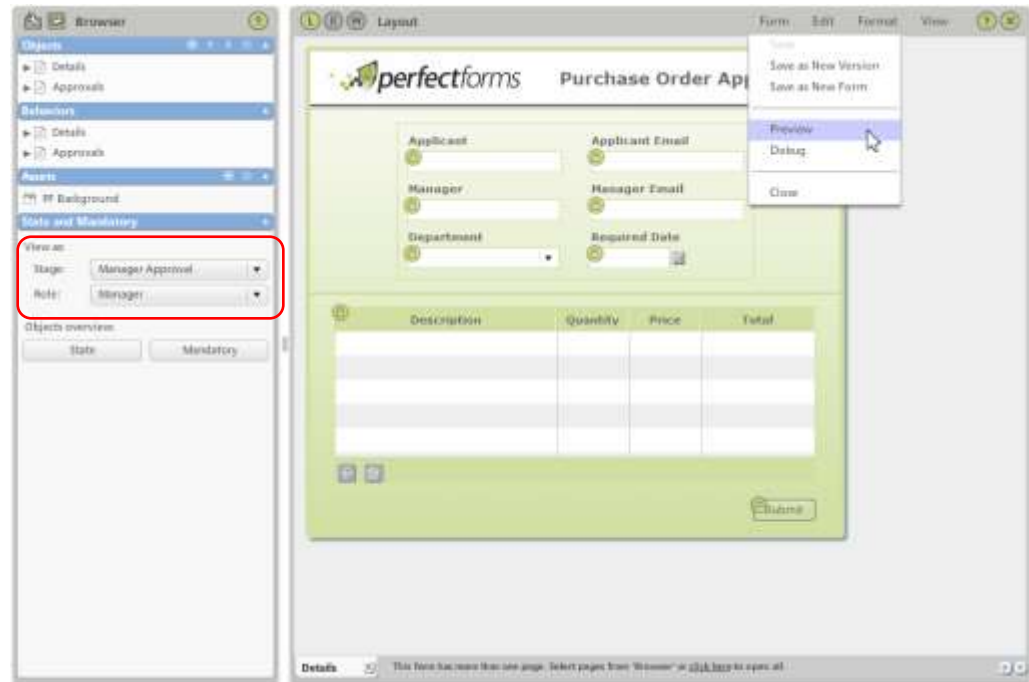
Note: Clients with On-Premise versions, installed locally, can set their own file type restrictions directly in the web.config file.



1.3 Preview Forms at specific Stage and Role combination

Select a stage and role from the browser before initiating the preview option to see how the form will look and behave at that combination of stage and role.

This can be a particularly useful way to check field access rules as well as any other behavior related to the stage of the form or the role of the person viewing it.



2 Integration

2.1 Web Services with namespaces

Web services with namespaces will support array operations.

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



3 On-Premise Version Features

3.1 LDAP - Auto-Synchronization

The Automatic Synchronize Scheduler is a service available only to On-Premise users. It is an application that will allow scheduled synchronization with a Network Directory on a daily, weekly or monthly basis.

The executable file needed to install the Data Export Scheduler Service can be obtained by contacting [PerfectForms technical support](#).

Note: Although the application can be installed on any machine, it will set up the service on that machine only. The service will only run if the machine is powered on. For this reason, it is recommended that the service is set up on the PerfectForms server.

The screenshot shows the 'Synchronize Users with Directory-Service' configuration window. It is divided into several sections: 'Connection', 'Attributes Mapping', 'Options', 'User-Groups', and 'Positions'. The 'Use Global Catalog' checkbox in the 'Connection' section is checked and highlighted with a red box. The 'Auto Synchronization' section is also highlighted with a red box, showing 'Add', 'Change', and 'Remove' actions all set to 'Allow'. The 'Attributes Mapping' section shows mappings for Unique ID (objectGUID), First Name (givenName), Last Name (sn), and Email (mail). The 'Options' section shows 'Default User Role' set to 'Limited User'. The 'Additional Attributes Mapping' section lists various attributes like Domain Username, Domain Prefix, Domain Suffix, Phone, Cell Phone, Fax, Skype, Alternate Email, Custom ID, Street, City, State, Zip-code, and Country.

3.2 LDAP - Use of Global Catalogue

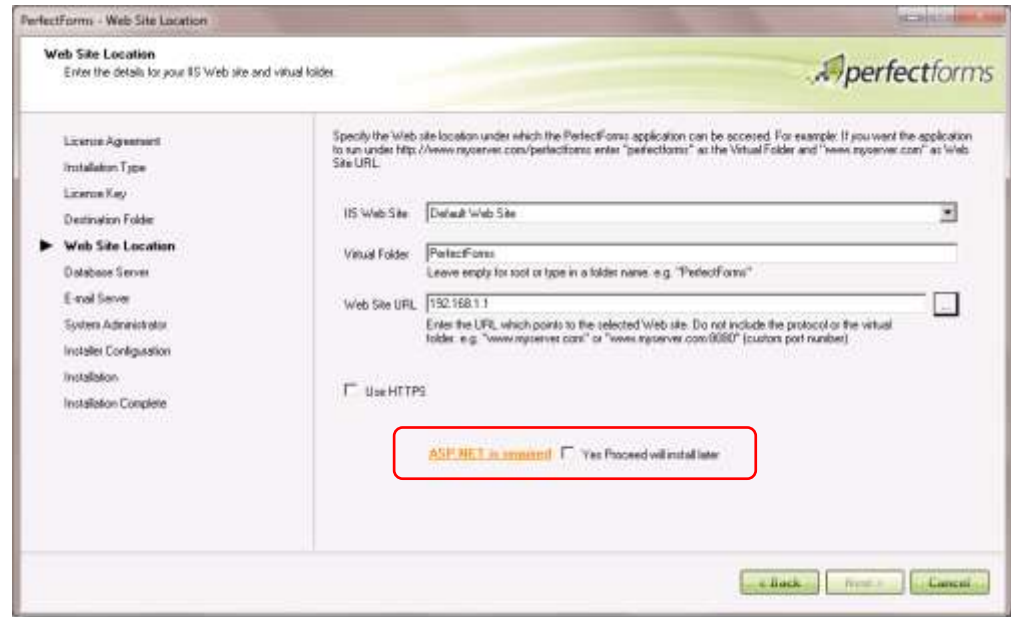
The synchronize feature supports use of Global Catalog. Check the **Use Global Catalog** checkbox to permit this feature.

The common method of hosting LDAP directory information is to use the default LDAP or LDAPS (secure LDAP) on ports **389** or **636**. These standard LDAP ports always exist on a Domain Controller (DC) and are rarely changed. Accessing this directory partition provides access to all of the objects within the domain that is hosted on the DC. There is no way to access objects from other domains using this method.

A DC can also be granted the Global Catalog (GC) role. Global Catalog (GC) role is an LDAP-compliant directory consisting of a partial representation of every object from every domain within the forest. This LDAP directory can be accessed on port **3268**, with LDAPS on port **3269**. LDAPS and the default LDAP ports' certificate requirements are the same.

3.3 Installer – Prompt for missing pre-requisites

If any pre-requisite features, such as ASP.NET etc., are not detected during installation the installer will show a message and prompt the user to confirm that it will be installed later.



3.4 Installer – Enable automatic reindexing

Check the **Enable automatic reindex** checkbox to add a reindex task in the SQL database which will execute on a weekly basis by default on Saturday 4:00am. This can be changed from the SQL Management Studio by the database administrator.

NOTE: This feature is not supported for SQL Express Installations.

The screenshot shows the 'PerfectForms - Database Server' configuration window. The 'Database Server' section is selected in the left-hand navigation pane. The main area contains the following fields and options:

- Server Name and Instance:** A dropdown menu.
- Database Name:** A text field containing 'PerfectForms'.
- Installation User:**
 - SQL Server Authentication
 - Windows Authentication
 - User Name:** A text field.
 - Password:** A text field.
- Runtime User:**
 - SQL Server Authentication
 - Same as installation user
 - Windows Authentication
 - User Name:** A text field.
 - Password:** A text field.
- Enable automatic reindex** (highlighted with a red box)
- Enable table view
- Encrypt the connection string
- Encryption Key:** A text field containing '73bc53be936246629b9127d7cb7ba4'
- Please copy the key and store the key as text file.

Buttons at the bottom include '< Back', 'Next >', and 'Cancel'. A 'Test Database Connection' button is also present on the right side.

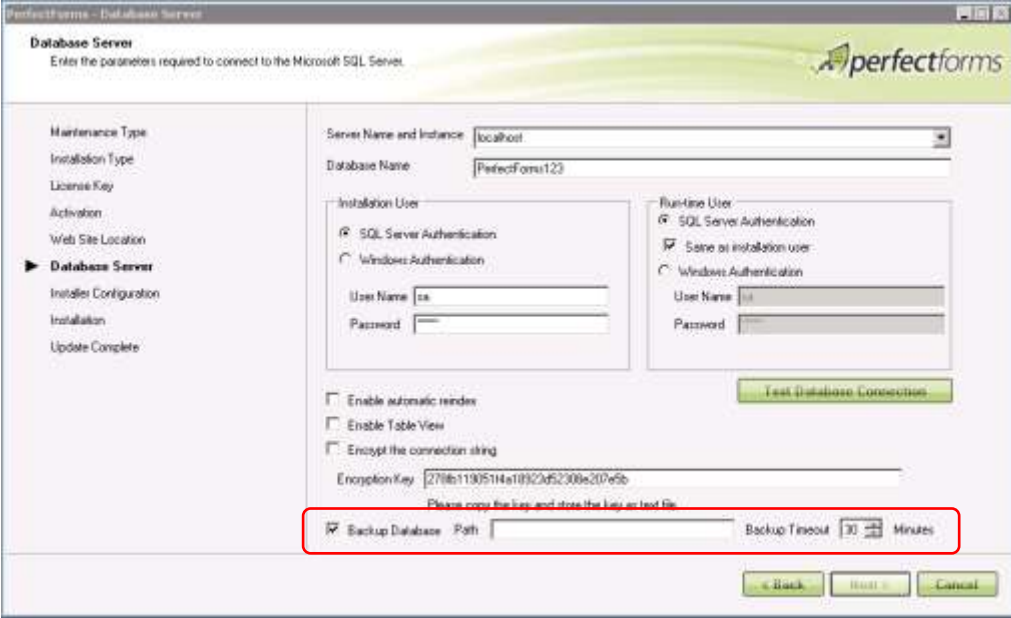
3.5 Installer – Backup Database during update

Check the **Backup Database** checkbox to enable a backup prior to upgrade.

Backup Pre-requisites:

The backup folder path provided should be an existing valid folder path on the database server.

Make sure enough storage space is available in the drive to accommodate the backup of the database



The screenshot shows the 'Database Server' configuration window in the PerfectForms installer. The window title is 'perfectforms - Database Server'. The main heading is 'Database Server' with the instruction 'Enter the parameters required to connect to the Microsoft SQL Server.' The PerfectForms logo is in the top right corner.

On the left is a navigation pane with the following items: Maintenance Type, Installation Type, License Key, Activation, Web Site Location, **Database Server** (selected), Install Configuration, Installation, and Update Complete.

The main configuration area includes:

- Server Name and Instance: localhost
- Database Name: PerfectForms123
- Installation User: SQL Server Authentication, Windows Authentication. User Name: sa, Password: []
- Run-time User: SQL Server Authentication, Same as installation user, Windows Authentication. User Name: sa, Password: []
- Test Database Connection button
- Enable automatic indexes:
- Enable Table View:
- Encrypt the connection string:
- Encryption Key: 270b11905114e1092d65230be207e5b
- Please copy the key and store the key as text file.
- Backup Database. Path: [], Backup Timeout: 30 Minutes

At the bottom are buttons for < Back, Next >, and Cancel.

4 List of Defects Resolved

The following reported bugs were resolved in PerfectForms™ version 4.0

- 6357 HTML Player: Set Property Command - Different background color in Flash vs Html
- 6561 Report DataGrid/DataList : File Attachment column not performing as expected
- 6587 HTML Player: Table Drop down column Set field in consecutive columns does not work
- 6591 Encrypt : The Field Level Encryption should work with AES Encryption Key
- 6642 Settings tab - Use Secondary Email Server
- 6650 Failed Notifications: Should not show failed notifications older than 2 weeks from current moment