PerfectForms -- forms software, workflow software and business process management

What's New in PerfectForms™ Version 1.15

Release Date: November 2, 2009

Contents

1   System

1.1   Creation of Connections and Actions Included in the Audit Log (DRF 965)

Creation of Connections and Actions will be recorded in the audit log in the admin console. This is applicable to On Premise installations only.

Viewing and Setting Up Account Logs

2   Dashboard

2.1   Migrate Data History (DRF 145)

In the Edit Forms view, on the form instance details, a new Migrate button has been added to allow for data history to be exported to XML or CSV format.

Exporting Data History of a Form Instance

2.2   Data History Now Includes Row Data from Table Objects (DRF 1033)

In previous versions data from a table object would be shown as '(List…)' and user would need to hover mouse over to see the details.

Accessing the Data History of a Form Instance

2.3   Use System Font Option (DRF 662)

In Account Settings, check the option Use System Font to allow for local language to be used in the editor and form builder.

After this setting has been selected the user will need to exit and re-login to see the effects.

Designers can build forms and reports that will use the system font. This will work for all characters i.e. Chinese, Japanese, Ebraic, Arabic.

Note that printing of special characters is not supported.

Administering Account Settings

2.4   Force a Password Change (DRF 683)

In the Account Settings Login section, check the Force Password Change After X Days option and specify after how many days a password will have to be changed.

Administering Account Settings

2.5   Allow/Restrict Editing of a User's E-mail Address (DRF 994)

In Account Settings select the Allow Edit of User's Email Address option to allow users to, or prevent users from, changing their e-mail address in the My Details section.

Administering Account Settings

2.6   Allowing a User to View Instances They Didn't Have a Role In (DRF 686)

A user would normally only be able to see form instances that they have been involved in by virtue of having a role. There is a new setting in accounts, settings, misc section 'Show form instances by permission' which, when checked, will allow full and basic users, who have been granted 'Data' permissions on a form, the ability to see all instances of a form.

Allowing Access to All Form Instances (for Process Owners)

2.7   Notification to a Position Now Supports Personnel Changes (DRF 778)

When a notification has been made to a PerfectForms™ position it is seen on the dashboard for the user who occupies that position. If a new user is put into the position then any historical notifications will be seen in the new user dashboard and not in the previous user dashboard.

Please note that this only applies to notification made in the PerfectForms™ dashboard, it does not affect any emails that have already been sent.

Notify Command - Person Tab

3 Form Builder

3.1 Tab Button Navigation for Radio Button Group (DRF 805)

A form user is able to tab into a Radio Button following the tab order rules specified in the form design. Once a user has tabbed into a Radio Button Group they will then be able to navigate within that group by using the arrow keys. Note that this feature has always been available. However, the Tab Stop property for a radio button was unchecked by default so therefore this behavior was not apparent. The default Tab Stop property for a radio button has been changed to checked.

Setting or Modifying Tab Stops and Tab Order

3.2 Use of Pictures as Buttons (DRF 122)

The picture object has been enhanced to allow the Picture is Clicked behavior event to support behavior commands such as Submit Data. The Picture is Clicked even can be used in the same way as a Button is Pressed event so that a picture may now be used as a navigation, submit or action button.

Adding a Picture or Graphic

3.3 Wrapping Header Text in Table Objects (DRF 714)

You can now specify table header height in order to wrap the header text in additional lines.

Managing Table Properties

4 Reporting

4.1 Data List and Data Grid Objects Additional Properties (DRF 555)

Text in Data List and Data Grid columns can be aligned left, center or right. When Number is selected as the format type in a Data List/Grid column it is possible to include a symbol.
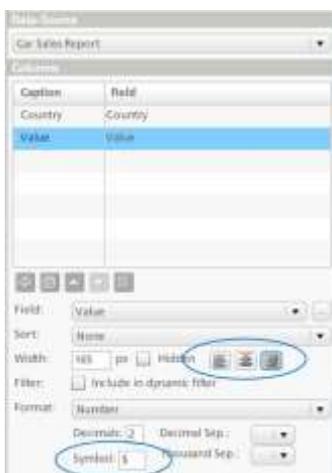
Adding a Data List or Data Grid

4.2   Open a Form Instance Link in the Same or a New Window (DRF 564)

The option of how to open form instances from a link in a Data List is available in the Misc section of the Data List properties. If checked, the form instance will be opened in a new window or browser tab, if un-checked the form instance will open in the same window, closing the report.

[Adding a Data List or Data Grid](#)

4.3   Text Wrapping in Data List/Grid (DRF 716)

In Data List Properties and Data Grid Properties there are options to specify row and header height to allow for text wrapping.

In the Row Properties it is also possible to specify Variable Height which allows the row height to increase beyond the specified height to show all text wrapped.
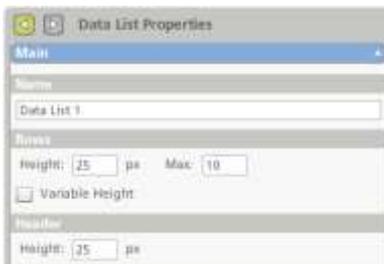
[Adding a Data List or Data Grid](#)

4.4   Ability to Set the Value of a Checkbox in Data List or Grid (DRF 790)

The value of a checkbox will normally be returned as True if checked or False if unchecked. In Data List or Data Grid Properties for a column there is a new format option Boolean (Yes or No) which, if selected, allows you to specify a value to be shown in the Data List or Grid as an alternative to True or False.

Note that if the Boolean format is selected but nothing is entered into the Yes or No boxes then nothing will be listed in the reports.

[Adding a Data List or Data Grid](#)

5 Integration

5.1 Stored Procedure enhancement (DRF 905)

Stored procedures, having previously only returned a single parameter, can now return a result set of data which can be used to populate table columns, drop-down or list objects.

Database Connections Action Types

5.2 Show Form Parameter Can Include All Rows (DRF 835)

When using the Show Form Parameter in a sending form, and the Get Custom Parameter function in the receiving form, it is possible to pass all rows for a table column to the receiving form.

In the Show Form properties and in the Source column select a Table object and the table column – all rows option.
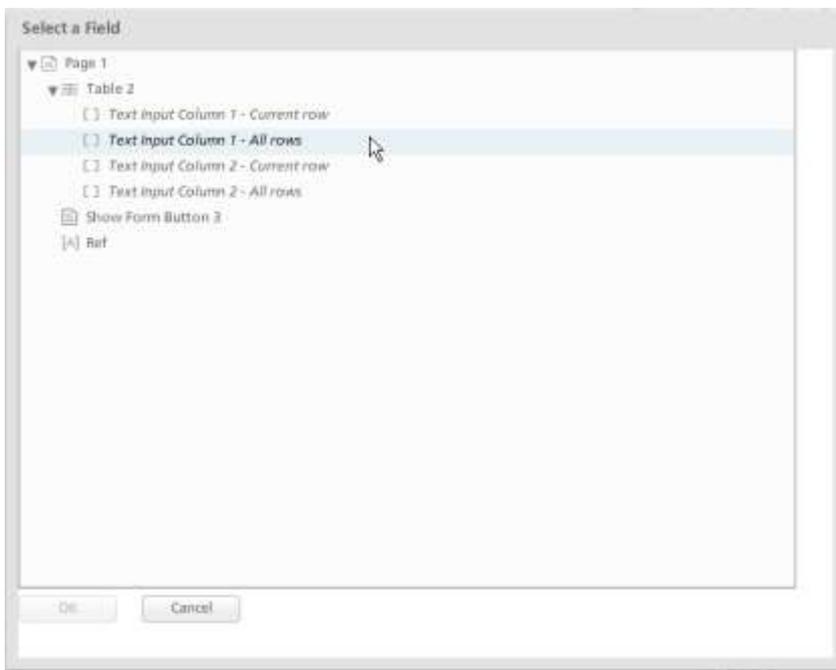
Setting Up Custom Parameters

5.3 Scheduled Export of Data (DRF 751)

An application, which can be installed on any machine, will allow scheduled exports of form data to be specified on a daily, weekly or monthly basis. This calls the PerfectForms API's GetFormData function at scheduled times.

Installation and operation instructions are included with the application but the user should also be familiar with the pre-requisites of using the API. Details are available in the help documentation.

Note that although the application can be installed on any machine it will set up a service on that machine. The service will only run if the machine is operating. It is recommended that the service is set up on a server.

Using the Data Export Scheduler

6 List of Defects Resolved

The following reported bugs were resolved in PerfectForms™ version 1.15.

- Focus out from a text object and in on a picture control is not triggered when a picture is clicked - changes in the text object are lost.

- A notification sent after a period taken from a field doesn't function correctly if you take the period from a time input object.

- Filter Input: Background color is not reflecting on the layout canvas or preview.

- Set List Value not working when list items are populated with data from a Money-type database table.

- Drop down/list: Items are messed up if you rename one then press Tab.

- Reports: Value, Filter Input, Filter selector objects are not available in printing.

- Date Input: Corner Radius property is not reflecting in printing.

- Vertical/Horizontal slider color is not reflecting in printing.

- Link object: Translation error under text section: $$$$ mouse_over.

- Typo in the Account is Expired message.

- Deselecting Show Header property affects the Set Table Rows command.

- Cannot delete a date in a date input object when form is re-opened at next stage.

- Set State command is not respected when form version is changed.

- Import option (Form Designer Edit menu) is disabled for connections.

- Client is unable to export data from a published form.

- Connection pop-ups don't retain size.

- Table objects are cleared (data is lost) after the instance is updated using Form connection Update action.

- Reporting printing - Line chart: Graphic values are not correctly calculated when using Linear/Category axes.

- Report printing: Metalink info is showing, not Open button.

- Account/License: When Upgrade the Account button is clicked the link is not opened.

- Fit Columns Evenly option doesn't function correctly.

- Data Source: OK button should become active when display name is changed.

- After Account Sign Up it should not ask to change the password.

- Vertical/Horizontal slider: When minimum value is changed, the pointer is no longer visible on drawing area.

- Flash player error appears when using Submit and Close behavior commands on a … Changes Field Data event.

- When using a Set Table Rows behavior command on Radio Button Changes Field Data event, three rows are added to the table.

- Table: Radio button column is losing selection when you navigate between pages (only visual -- after submitting, selection appears correctly).

- Design mode: Selection of the first object created on the page is not reflecting in Browser tree.

- Group/Page: Background picture is not displaying in preview if Pre-load option on Picture Properties is not selected.

- Link object is not working when using Value of a Field option on the Link Properties.

- Date input: Date entered directly is set to Now when using DD/MM/YYYY and DD.MM.YYYY formats.

- Date input: Date entered directly overwrites Years-To property in preview.

- Date input: When the object gains then loses focus, empty date is set to Now (in preview).

- Date input: When format is DD/MM/YYYY or DD.MM.YYYY, selected date returns to current date.

- Table: Date input column: When using DD/MM/YYYY and DD.MM.YYYY formats, selected date returns to current (can't select another).

- Table/Text input column: Custom format is not working.

- Table: Hidden columns are not visible on drawing area after clicking Reset on the State Overview dialog.

- Table/File attachment column: Can't change button position properly.

- Table/Drop down column: Selected item as default loses selection in design.

- Table: Columns width is not correctly reflected on layout canvas after resizing.

- Export to CSV doesn't work for table data.

- Dashboard - Notifications screen: No Attention Needed shows the same instances as Attention Needed view.

- Time input: If the object is empty, … Changes Field Data event is executed when seconds gain focus.

- Time input: Show URL behavior command on … Changes Field Data generates an infinite loop.

- System error occurs when printing a table with a radio button column.

- Table/Radio button column: When you navigate between rows, selection jumps from one row to another.

- Submit button: Flash player error is shown when using empty Redirect to URL option.

- Form Properties: Reset Start Page is not working.

- Table width is not correctly calculated when Delete / Undo Delete is used to delete the last column.

- Empty time input column appears as if the data has changed in the data history table.

- Table/Radio button column: If a radio button in a table is selected, … Changes Field Data event is still executed when you click on it.

- Table: File Attachment Is Shown event is not working.

- Printing/Headings: Enter key is not correctly interpreted.

- Table/Date input column: Empty date is set to 01/01/1970 after submitting.

- Printing/Date calendar: Last days of the month are exceeding the border (intermittent).

- Instances created as child instances without submitting the parent instance cannot be opened by Show Form commands/buttons.

- Printing/Ranking: Items order is not reflected in printing when using Predefined Lists.

- Printing/Multiline Input Object: Align property is not respected.

- Printing: On first stage, objects are hidden when they should be visible (only hidden is predominant for that object).

- Printing/Table: When last column is hidden, the border is still visible (object looks strange).

- Reports Printing: After you clear the filter, the Filter Selector still shows the value.

- Reports Printing: Gauge background is not reflecting in printing (only when you create a crosstab first).

- Audit Logs - Submit Form Instance does not log the Instance name correctly.

- State is not changing from default to hidden using Set State command.

- Printing/Horizontal Slider: When Min/Max Captions are empty, some of the objects are not included in printing.

- Reports Printing/Pie Chart: Application is blocking when using a certain combination of numbers as data.

- The value of a text input containing a long number (longer than 17 digits/characters) is not correctly retrieved.

- Integrated authentication: You can have two users with the same Domain Username.

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- Audit - Sign Up from Notification Link action is not recorded.

- Can't assign an user to a New Position. This message is shown: No access permission.

- Undo Delete form instance is not working; system error is shown.

- File attachment: Can't attach files like .txt, .doc, .pdf, .pf, etc.

- Signup for a new account: The Successful Sign Up message should be changed.

- Newly added databases are not saved into config.xml for any new added datasource.

- Some passwords from config.xml are not properly encrypted by the Configuration Agent and authentication fails.

- When Show Form Instances by Permission account option is enabled, selecting a form from the Forms view generates a system error.

- Reports: Filter input is not working; flash player error is shown.

- Table: Width is not correctly displayed in design (refresh issue).

- Can't update personal details from Administer My details; error is shown.

- Admin console: Accounts tab: Search Option isn't working.

- Admin Console: List of users per account looks empty.

- Can't share/unshare a report; error is shown.

- Table: File attachment column is not working.

- Account Settings: If Include Custom ID is not selected, you can't check/uncheck Use a Connection Look-up option.

- Backwards Compatibility/Table - Header properties are not kept/can't be changed from previous versions.

- Printing: When an object's state is changed from Hidden to Normal using Set State command, in Printing the object is still Hidden.

- Export Data XML is not working correctly for forms without instances.

- Condition on multiple branch not correctly evaluated.

- Connection Actions: Some instances created using an Insert connection action do not show in the list of instances when performing a Read form connection action.

- Instances can't be exported with the data export options if a picture was attached to the instance using image import.

- File attachment: After download, .docx files are saved with .docx.xml extension (on Chrome).

- Error when submitting an instance with a notification rule that uses the Send After a Period Taken from a time input option, if seconds value is different than 00.

- Connections: Migrate button is missing.

- Reporting: Crashes when you use Date is Equal, Greater, etc. as a filter in datasource.

- Web Service connection actions: Autocomplete fails and causes browser to crash if the response XML is too large.

- Message boxes to force browser to scroll so that Flash application with a message box is still visible.

- Connect And Search action: Results are showing numeric field responses with six digits after decimal, although the source field is set to two digits.

- Form Connection - Update Action: Table Columns cannot be transmitted.