

Release Notes PowerFlow Version 3.9

This release of the PowerFlow software focuses on several new, key functions requested by customer accounts with specific needs that provide value across our user base. These release notes include enhancements and changes from Release 3.5 that are rolled into this version.

- Refer to **TEC100 - Release Notes, PowerFlow Version 3.4** for detailed information on enhancements and fixes prior to Release 3.5 through Release 3.9.

Items below preceded with **[3.9]** and **[3.9.29.0]** refer to specific enhancements in this newest release.

Additions and Enhancements

This release of PowerFlow 3.9 is the result of heavy, focused development into a priority list of new features and enhancements that evolved from customer requests. A criterion was the applicability of each new feature across the customer base, adding significant value for existing and new accounts.

- Caution:** Once a PFL file is opened with v 3.9 and new features (hidden tags, new audit features, more than nine filters, and so forth) are set up on the vault, that vault file **will no longer** be compatible with previous versions of PowerFlow!

[3.9] Email Notification

Automatic email notification functionality has been implemented to send emails automatically at a specified time based on the pre-defined filter criteria. You can also select the option to send a *PowerFlow Command* file (.PFC) as an attachment with the email. A PFC file is basically a shortcut to a specified folder, document, or item; the recipient clicks the PFC link and PowerFlow displays, open to where the shortcut was pointing. Detailed information is provided in a separate document, *TEC070 – Email Notification*.

Auditing and Change Management

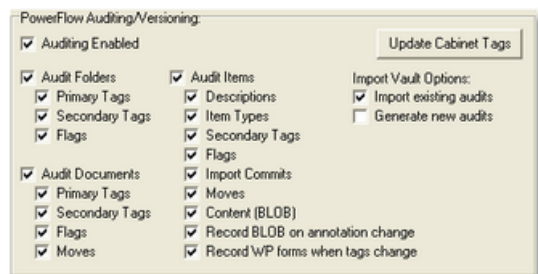
The auditing function in PowerFlow prior to this release (*Audit Review*, from the *Vaults* menu) has been augmented with a powerful, comprehensive and complementary function: *Show Audits*, accessed from the *Filter* menu. In short, *Show Audits* displays only documents—in the list area—that have been altered, detailing change type, item name, tag, value, modification date and time, and user.

A second function from the *Filter* menu, *Show Audits and Data*, shows the same information in addition to the document data you expect to see normally.

- Admin** user rights are required to access *Show Audits*.

This new function gives you the ability to search or select a specific index record (folder, document, or item) or all index records based on a selected field. For example, search to review any version changes to a specific client or customer record based a main index folder field. This includes any changes to the index records or items in the database, such as Excel or Word documents. For versioning needs, this function also gives you oversight control into tag value changes.

The *Show Audits* function is available with both server-based and local vaults. To enable *Show Audits*, from the *Vault*



Structure dialog on the *Misc.* tab, checkmark **Auditing Enabled** and other options as appropriate for *each* cabinet you want to audit from this point forward (you must have at least one identity tag at the folder level and one at the document level for each cabinet audited). Be sure to click **Update Cabinet Tags** on each cabinet when finished.

[3.9] **Shortcut Menu Selections**

Save Shortcut and **Email Shortcut** options have been added to the menu and context menu of each level (Folders, Documents, and Items). **Shortcut** creates a PowerFlow Command file (.PFC) which contains the information about the current vault being used, cabinet being used, and the current record (folder/document/item) selection. When a PFC file is double-clicked, PowerFlow opens, opens the specified vault, and displays the *User Login* dialog. Once you enter the correct login information, the specified cabinet opens and PowerFlow takes you to the record for which the shortcut was created. A PFC file can also be created manually with Notepad and it supports all the startup command-line options.

[3.9] **Authorize Batch File**

The **Authorize Batch File** option has been added to the *Vault Security* dialog to securely embed the user login credentials in the PFC file to do *Import Data* and other tasks. PFC file can be locked and secured so that modifying, renaming, or file location changes can make it invalid.

Export Data

The purpose of the new *Export Data* feature is to write PowerFlow data (folder, document, and/or item primary tags) to a file in a standard way so that that data can later be read back into any other program that supports standard delimited text files.

The data to be written may include all of the data in a PowerFlow cabinet, or it may be specified using PowerFlow filters to export only specific folders, documents, and/or items.

i To use this feature, users must have the **Export** security right.

A large number of options are provided to write the data in a variety of ways to match the format standard of nearly any system or program that can accept delimited text files (refer to **TEC060 – Export Data** for details on these and other options, or request a copy from your PowerFlow representative).

These filtering and output format options can also be saved as a standard “preset” so that the same export operation, with the same filter criteria and output format, can be performed repeatedly with minimal effort. The *Export Data* option always works on the current cabinet; therefore, a cabinet must be open for the option to be available. Once a cabinet is open, and if the current user has *Export* rights, the *Export Data* feature can be initiated through the **Export Data** option on the **Send** menu.

[3.9] **Startup Commands**

The **ExpData** (*Export Data*) command has been added to enable *Export Data* functionality from the command line.

The **-VLT** command functionality has been changed to allow opening remote vaults in addition to local vaults.

Refresh Views Feature

A *Refresh Views* option has been added to the *PowerFlow* menu (or, press **F5** from anywhere). It updates the records shown in the panels with the latest data from the database.

Alpha Order for Templates

Folder and document level template lists are now displayed in alphabetical order. Previously, the lists displayed by date of creation.

Reverse Item Sort Option

A new option, *Reverse sort*, has been added to the *Item Naming* tab in the *Vault Structure* dialog. When checked, item descriptions in the *Items* panel appear in reverse sort order. This is especially beneficial for medical practices and other organizations which require the most recent event or visit on top.

Hidden Index Tags at both Horizontal and Vertical Levels

We have expanded the previous level of hidden index tags from the vertical level to include the horizontal level. This lets you use primary index tags at the form level to be searchable from the filter level *without* including them in the hierarchical PowerFlow view.

For example: you can input data at a form level and search for that data in a filter.

Wild Search Option

A new option, *Wild Search*, has been added for tags in the *Tag Inventory* dialog. It allows you to do a contains-like search in the index filter without requiring an asterisk (*) in front of the search text.

User Rights

The *Connect*, *Open*, and *Close* menu options in the *Vaults* menu and *PowerFlow Client Setup* option in the *PowerFlow* menu are now not restricted to any specific user rights. These selections will be visible and enabled all the time, regardless of login.

Filter Enhancements

We removed the previous limit on how many filters can be created: make as many as you need. Additional filter enhancements include:

- Added the *Select Filter* option to the *Filter* menu so you can choose any of those additional filters (only nine filters are allowed on the *Filter* menu, but the *Select Filter* dialog allows any filter to be selected).
- Added the *Organize Filters* menu option to the *Filters* menu to allow each user to determine which nine filters they would like displayed on their *Filter* menu (this information is saved in the INI file, so it is user-specific).
- Added an *Automatic* option to the *Organize Filters* dialog to allow the *Filter* menu to be built automatically based upon the user's most-recently-used filters.

[3.9] *New Filter Options*

Six new filter options have been added for the Date and Date/Time data types. Detailed information is provided in a separate document, *TEC065 – Date Filter Mask*.

1. Start of Week
2. End of Week
3. Start of Business Week
4. End of Business Week
5. First Sunday of Month
6. Last Sunday of Month

Additional Enhancements

Additional Keyboard Shortcuts

New shortcut keys have been added to the following menus:

PowerFlow	F5 (Refresh Views)
Vaults	Ctrl+F4 (Audit Review)
Find	Shift+F3 (Find Text)
Filter	Shift+Ctrl+F (Clear Filtering), Ctrl+F (Select Filter), F4 (Show Audits), Shift+F4 (Show Audits and Data)

Enter Data Dialog

The *Enter Data* dialog for a filter now shows the *Display Name* instead of the *Tag Name* (internal name).

Progress Bar Cancel Button

The progress bar for *Import Data*, *Import Vault*, and *Export Vault* processing now includes a *Cancel* button to quit the task.

Long File Name Display

The *Import Items* and *Transfer* dialogs now allow you to expand the width of *File Name*, *Size*, and *Date* columns to better display long file names.

Import Items and UNC Path

The *Import Items* dialog has been enhanced to allow an UNC path (for example, `\\computerName\shared name\...`) in the folder field.

Clipper Enhancement

When a new document and its associated item is created using the *Clipper*, PowerFlow now checks for the existing unique tag values at the document level and if it finds an existing unique value, displays a message.

PowerFlow Internal Word Processor

The internal PowerFlow word processor has been enhanced to retain the location and color of text in the header and footer.

[3.9] *PowerFlow OCR Engine*

An updated version of the OCR engine has been embedded in the PowerFlow software. This version has much better character recognition than the previous version.

PowerFlow can now use the latest version of the Transym OCR engine if it is installed on the PC. If it is not installed, PowerFlow will use the embedded OCR engine version.

- The **Append Tags** command has been added to OCR script commands to allow appending a tag value or a constant value to another tag value.
- The **Match Tag** command has been changed to allow comparing two tag values in addition to comparing a tag value against constant value.

Options in the *OCR Setup* dialog have been rearranged and, to get the optimum OCR result, several options are now selected by default.

Character Substitution functionality has been added to the *OCR Setup* dialog to allow like characters (for example: 1, l, I, o, O, 0) to be read and then to convert them to what the user specifies in the settings.

The following options have been added to *OCR Area & Image Alignment* commands:

- The **CharSet** option has been added to the *OCR Area and Image Alignment* commands of the OCR script to individually control the characters that those commands should read. If no characters are specified, global settings will be used which are defined in the *OCR Setup* dialog.
- The **CharSpace** option allows to either include or exclude the blank spaces in the final result.
- The **OcrDict** option allows to either use or don't use the dictionary to help in recognizing the OCR'd words.
- The **OcrBFont** option helps in recognizing the characters if the characters being read are in the OCR B font.

[3.9] LZW Support

The PowerFlow internal image viewer now supports LZW compression in TIF image files.

[3.9] PNG file Support

The PowerFlow internal image viewer now supports the [Portable Network Graphic](#) (PNG) file format.

[3.9] Barcode Recognition

Barcode recognition has been improved significantly. PowerFlow can read barcodes on JPG files, in addition to TIF files, at lower DPI scan settings.

Vault Structure

Enhanced with additional code to ensure that, when a new primary tag is added to the folder or document and Create DB is selected, no data is lost in the SQL or DBISAM server vault.

[3.9] A new SQL query *Timeout* field has been added to the *Vault Structure* dialog so that longer timeout times can be set for large databases. This ensures that Filters don't fail with the timeout expired error message.

[3.9] Basic audit options have been changed in the *Vault Structure* dialog to capture nothing, just Changes, just Views, or both Changes and Views.

[3.9] A *Retain selection when clearing filter?* option has been added to the *Vault Structure* dialog. When this option is selected, PowerFlow retains selection at the Folder, Document, and Item level and retains any index filter values when the *Clear Filtering* option is used from the *Filter* menu.

[3.9] Vault Security: Auto Logoff

An *Auto Logoff* option has been added to the *Vault Security* dialog to logoff the user if there is no user activity for a specified time. For remote vaults, PowerFlow closes the vault and for the non-remote vaults PowerFlow shows the *User Login* dialog. Please note that PowerFlow will *not* auto logoff if any dialog box is left opened. However, PowerFlow will logoff immediately once the opened dialog is closed if the specified time has expired.

[3.9] Import Data

Issues related to *Import Data* in Vista and Windows 7 have been resolved.

The UNC (Universal Naming Convention) path can now be used in CSV, Excel, and TXT files to specify the paths of the files which need to be imported into PowerFlow via *Import Data* functionality.

[3.9] MSecStamp

Using MSecStamp (Millisecond Stamp) as a default value for a tag no longer creates duplicated values.

[3.9] PFLicense

The ability to share the *PFLicense* table among different vaults has been added.

[3.9] PDF

The PowerFlow Internal PDF writer and PDF viewer have been upgraded to the latest version and PDF viewer ability to render different kinds of PDF files has been improved.

[3.9] Compatibility Issues with Previous Versions of PowerFlow

- Existing batch files which are created to do *Import Data* automatically will not work with this version of PowerFlow. A PFC file must be created and authorized with the *Vault Security* privilege to do the *Import Data* process successfully.
- All the changes related to the OCR scripting and functionality are compatible with the OCR scripts in the previous version of PowerFlow and don't require any changes to the existing scripts. However, you might want to modify the *OCR Area and Image Alignment* commands to take advantage of newly added options to those commands which improve the OCR recognition/readability.

[3.9.29.0] Updates and fixes

- Drag and Drop functionality is now available. Drag and Drop functionality lets you drag a file or multiple files from Windows Explorer, the Desktop, or email attachments in Outlook and drop them directly into PowerFlow. Dropped items show up under the *Import* tab in the *Items* panel. Drag and Drop functionality also lets you automatically assign dragged files to documents in PowerFlow when they are dropped.

Drag and Drop is not enabled by default; it can, however, be easily enabled through the *Vault Options* dialog. Various options related to Drag and Drop

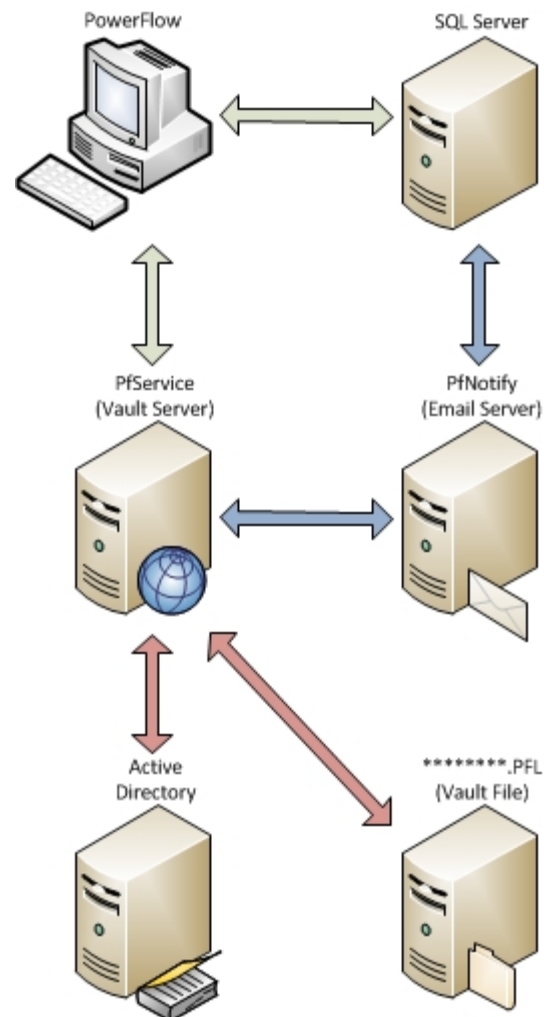
functionality are also configured through the *Vault Options* dialog. Drag and Drop requires *Edit* and *Import* security rights for a user. If only the *Import* security right is given to a user, then that user will be able to drag and drop files into PowerFlow, but will not be able to assign them.

- An issue with using the Windows Authentication option for remote vaults has been fixed. Now, it is possible to use the current logged in Windows user credentials with PowerFlow to connect to remote vaults. Users will not need to provide their Windows login info in the *PowerFlow Client Connection* dialog explicitly. (Refer to *TEC026 – PowerFlow Server and Client Setup Instructions* for details, or request a copy from your PowerFlow representative.)

- The Vault Server has been modified so that it doesn't require running the PfService.exe on the Domain Controller. PfService.exe can be placed on a member server in the domain and can point to the Active Directory running on the Domain Controller. Vault Server also doesn't require placing the vault files (PFL) on the same machine where the PfService.exe is running. (Refer to *TEC026 – PowerFlow Server and Client Setup Instructions* for details, or request a copy from your PowerFlow representative.)

With this enhancement, PowerFlow and all its related components can be stored on a single computer *or* distributed to several computers, as shown at right.

- Auto indexing through the OCR functionality has been enhanced. Now, it is possible to assign items through OCR functionality based on only document identity tags. Documents must already exist and must be unique throughout the whole cabinet and not just in a folder to which they belong. To use this new functionality, select the *Document Indexed* option for both *Assign Folder* and *Assign Document* OCR commands.
- Fixed an issue in regards to the *Refresh Views* (F5) option, where the focus on the document of the selected divider tab was lost when F5 was pressed.
- Fixed an issue where secondary tags were used as Inline Data in a WP template which didn't contain any *Form Field* tags—the secondary tags value on the WP didn't get saved to the database and continued to change.



- Fixed the time format of the default value {{AutoDate}} and {{AutoTime}} when they were used with the TEXT data type tag. It was using the 24-hour time format instead of the 12-hour format.
- Fixed an issue in which the default values {{AutoDate}} and {{AutoTime}} for the DTTM and TIME data type was saved incorrectly if the current time on the computer was between 12:00 PM and 12:59 PM.
- An export feature has been added to the *Vault Security* dialog which allows exporting the user login info and security privileges to a CSV file format.
 - ❗ **Note:** Users' passwords are *not* exported as a part of Export feature for security reasons.
- The license expired message has been changed so that it doesn't appear alarming; it now specifies the steps which can be taken to resolve temporary license expiration situations.
- Several SSL encrypted methods have been added to use with SMTP email delivery. PowerFlow supports SSL v2.0, SSL v2.3, SSL v3.0, and TLS v1.0.
- Annotation editing for *non-Edit* users is now allowed. This is a cabinet level setting and it can be turned on or off from the *Misc* tab in the *Vault Structure* dialog.
- The "Selected printer is not valid" error has been fixed; this was showing up when "Show Printer Setup" was set to Yes in *Print Output Options*.
- PowerFlow requires at least 16-bit colors to function properly. PowerFlow now shows a user-friendly error message if it is run in a 256-color environment.
- *Find Text* and *Prepare Find OCR*-related dialogs now show the same level (panel) where the cursor focus is at the time of selecting the options. The *No Auto-orient* option is now checked by default in the dialog for the *Prepare Find OCR* menu item. The *Cancel* button in the progress dialog during the *Prepare Find OCR* process now aborts the process completely when it is clicked.
- Fixed an issue in which the existing Secondary tags in the target vault got deleted during the copying of a cabinet structure from another vault using the *Vault Structure* dialog.
- Fixed an issue in which the cursor focus was automatically shifted to the PDF viewer when a PDF item in the *Items* panel was selected. Now the focus stays at the *Items* panel.