

*This release of the PowerFlow software focuses on reliability and performance and addresses all known issues and bugs to date. Development effort was dedicated to customer feedback and concerns; and, in order to validate the highest degree of stability, QA ensured this was the most comprehensively tested version so far.*

*For ease of review, these Release Notes are a compilation of PowerFlow Version 3.3 release notes through Version 3.4. Many of the features in 3.3, for example, have been further optimized and thoroughly retested for 3.4.*

## Additions and Enhancements

The release of PowerFlow Version 3.3 entailed a significant amount of business and development effort to enhance existing features and functions and provide additional benefits. Version 3.4 built on that effort to produce an exceptionally stable application. Much of this direction was based on valuable customer feedback, which not only detailed issues, but also helped fine-tune processes and interactions with PowerFlow in real-world environments.

### ***New Hide Attribute for Primary Tags***

This new feature allows vault builders to hide tags that would normally appear in the filter grids of each panel. Previously, all primary tags that were defined on a vault (folder or document tags) appeared in the filtering grids at the top of each panel as well as at the top of the Items panel.

In many cases, you do not need to actually do filtering on all of these tags and they just take up space. With v3.3 the vault builder can choose to hide those tags that are not frequently used in filtering the grids, thus saving a lot of screen real-estate. In vaults where there are a lot of primary folder or document tags, this can be a significant space saver. Access this option via the Vault Structure dialog (you must have vault builder privileges), in the Tag Inventory option. On each tag defined in the Tag Inventory there is a new checkbox option called **Hide** which, if checked, will hide the tag in the filter grid.

- Note:** Even when a tag is hidden in the filter grid, it still appears in the data grid. It is also still accessible in the filter grid by selecting a tag adjacent to it and using the mouse to scroll up or down into the tag field. Scrolling with the mouse goes through all of the tags, even the hidden ones, making them visible as they receive the cursor.

### ***Support for Split PFLs***

This feature was designed to make for easier distribution and maintenance of vaults with shared functionality, as in the case where multiple locations or branches or similar industries all use the same type of vault, but need some customization. What Split Vaults allows a vault-builder to do is to put some of the stuff that is common to all such vaults in one vault, while putting all the custom-tailored elements in one or more *other* vaults.

When changes need to be made to the common vault, a new version can be shipped to the customers without affecting their custom settings. This makes vault maintenance much less costly, as multiple vaults do not have to be produced for every change made. The user still opens and uses the vault in the same exact way: just opening the single PFL file. But, upon recognizing that other split vaults exist, PowerFlow will now load any of those vaults as well, without any further user interaction. Split vaults are identified by a numeric value appended to their name, for example:

VaultName.pfl, VaultName\_1.pfl, VaultName\_2.pfl, and so forth.

There is no change at all for the user, who simply loads VaultName.pfl as always. Vault-builders can create the remaining vaults using the new PFSplitter tool described below. While the feature was designed for easier vault distribution and maintenance, it will—no doubt—find countless other uses.

### ***MAPI Email Support***

Previously, PowerFlow supported sending email via SMTP. This means that PowerFlow has built-in all that is needed for it to send emails, independent of any other email application (called an email client). The advantage, of course, is that customers do not need any other software to send emails. The disadvantage was that if the user already has an email client (and most do), then PowerFlow was unable to non-deferred integrate with that client in order to share the address book, retain sent items, schedule sends, and other features the dedicated email client might provide. So, in addition to the previous SMTP (which still exists in the product and still operates in exactly the same way), version 3.3 also introduces MAPI as an alternative to the SMTP option.

MAPI is an industry standard for integrating applications with email clients like Microsoft Outlook or Outlook Express (or any other MAPI-compliant email client). With the MAPI option enabled (via the **PowerFlow|Email Setup...** option) all requests to send email will result in the email client opening up a new email message populated with the PowerFlow data. The user can then use their standard address book, or any of the other features of the email client, and then transmit the email from that application.

### ***Ability to Email Individual Items***

Previously, the only way to send an email via PowerFlow was to do an **Email Output...** operation which acted just like printing to a printer, but instead printed to a PDF document that would be emailed. In addition to that option, we have added the ability to email selected items *directly*, without having to go through the **Email Output...** function. In addition, items that are emailed in this way are sent as actual attachments to the email, so they can be used directly by the receiver. For example, if a TIF image is emailed in this manner, the recipient receives a TIF image as an attachment. The same applies for *any* type of item sent (Word documents, PDF files, and so forth).

This email may be sent either using the SMTP option or the newer MAPI option (as explained above). To use email with this new option, the email settings must first be set up (one time) via the **PowerFlow|Email Setup...** dialog. After that, items may be emailed at any time by selecting them, right-clicking, and choosing **Send via Email** from the context menu. Multiple items may be selected and emailed as well, and all will be added as attachments to a single email.

### ***New Synchronization Function***

Synchronization is an entirely new and powerful feature of PowerFlow v3.3. It is intended as a means of merging or replicating data between two vaults of similar or dissimilar structure, but it can also be used to perform utility or update functions on a single vault (such as workflow management) by having that vault synchronize with itself.

The feature is extremely versatile and powerful and requires an administrator to set up the business logic for the synchronization initially. But, once those rules

are established (via the **Vaults|Synchronization Setup...** dialog), users can synchronize vaults by just clicking.

The power and flexibility of this feature are way beyond the scope of this document, and a logical development process (much like designing a vault) is required to set the rules for the sync. But, once those rules are established, any user can quickly and easily perform very complex synchronization tasks without any skill other than where to click. Uses of synchronization include automated archiving of information, lifetime management, workflow, merging data between completely different vaults for different functions (e.g., transferring data between a mortgage broker and an underwriter), and almost any other task involving the transfer or updating of data in a vault or between two vaults. New uses for this feature will no doubt crop up and it will be used in ways we did not even envision during design.

### ***Added Command-line Trigger for Synchronization Operation***

The afore-mentioned Synchronization feature can also be triggered via a command-line parameter to PowerFlow. This means that synchronizations can be fully automated and even scheduled (via the Windows Scheduler), by just launching the application with the **/Sync** command-line option and a parameter to specify the synchronization task. This allows for such things as scheduled unattended archiving to occur every evening, or having data be synchronized with a main office every few hours, and so forth.

### ***Improved Automatic Update, More Precise and Reliable***

The automated updating feature of PowerFlow (**Check for Updates...** under the PowerFlow menu) has been improved to be more reliable and to provide more detailed and more accurate information when an update is available.

### ***Added Context Menu for Indexing Operations***

The left side of the Scan, Transfer, and Import panels (where the assign/commit buttons are) now supports a right-click context menu with these operations—for those who prefer to use such a menu—and for consistency with all other toolbar functions.

### ***Emailing via SMTP (non-MAPI) Email Displays an Addressing Dialog***

When sending email via the **Items|Send Via Email...** function (using SMTP), a dialog box displays allowing you to specify the addressing fields (From, To, CC, BCC) as well as the subject and body for the outgoing mail message. This dialog is now also available via the regular **Send|Email Output...** command if the TO field is not specified.

This allows email output templates to be created that will prompt the user for the addressing fields instead of requiring them to enter the fields into the output dialog or have them hard-coded in the output template. To do so, the creator of the template needs to leave the TO field *blank*.

- i** Note: This option does *not* apply when the MAPI option is selected as it is not needed with MAPI (the email client application performs this function by displaying the email and requesting this information).

### ***New Duplicate Feature for Items, Documents, and Folders***

This is a new feature in PowerFlow v3.3 that allows a user to create a copy of any item, an entire document, or an entire folder. By first selecting the desired

Folder, Document, or Item and then selecting **Duplicate** from the main menu or right-click context menu, an exact copy of the selected data will be made with primary tags either set automatically (e.g., current date, incremented count, timestamp, and so forth) and/or user-prompted data.

For example, a user could right-click on a document, select **Duplicate**, and the Edit Document dialog will display with any automatically calculated fields, as well as fields provided from the original. The user changes this data as desired—or leaves it as-is—and clicks **OK** to create a new document with those tag settings and a complete copy of all the items contained in the original.

Defining the rules for the duplication (such as which tags retain their values, which tags are automatically populated and with what, which tags the user can change or must change) are controlled—for folder and document primary tags—by new settings on each tag in the Tag Inventory (accessed via **Vaults|Structure...**). Similar options for the naming of duplicated items are available in the Vault Structure dialog under the Item Naming tab. An entirely new Duplication tab has been added to Vault Structure to allow precise control over the duplication process and the assignment of modification dates, GUIDs, and so forth.

Vault builders who are constructing vaults that will take advantage of this duplication feature should examine all three of these locations to ensure the correct settings. Once established, however, duplication for users is as simple as making the menu selection and clicking **OK**.

### ***New Item Renumbering Options***

A new option (a checkbox) has been added to the Item Renumber dialog called **Maintain Item Sequence**. Checking this option automatically renumbers *all* numbered items in sequence each time any item is moved (renumbered). This makes sequential renumbering much easier.

In the past, for those users whose items are kept in sequential numeric page order, it was cumbersome to change the page numbering. Changing the page number of one item would not make room for that item, but would instead leave two pages with the same number and require the user to go through a complicated and non-intuitive process of renumbering the remaining items to move them above the item that was inserted. Now, a user only needs to ensure that the new **Maintain Item Sequence** checkbox is selected and when any item is moved (renumbered) to the same number as another existing item, all of the items will be renumbered to accommodate the inserted item. This greatly simplifies moving of pages (items).

There is a new option in the Vault Structure dialog under Item Naming that specifies whether or not the **Maintain Item Sequence** checkbox should be on or off by default. Vault builders who are constructing vaults that are intended to hold sequentially numbered items should *check* this checkbox and those who are building vaults that lean more toward named items should *uncheck* the checkbox. In either case, users always have the final ability to override the setting in the Item Renumber dialog; however, setting the proper default will save the user a step in the majority of cases.

***Import and Transfer can now Retain Date or Size Order***

In the file selection dialog that displays when doing an Import Items or a Transfer Items operation, the user can now click on the grid headings for File Name, Date, or Size to have the file information sorted in that order. Further, if the data is sorted by either Size or Date, then the size or date, respectively, is pre-pended to the file name upon import.

Because of this, the items will retain this same sort order when displayed in the import or transfer file indexing grid and will even retain that order when committed to a document when the **Automatic Numbering** option is enabled.

***New Filter Option Allows Filter Changes without Losing Position***

Added **None** buttons to filter Folder, Document, and Item filter editing areas that let users apply a filter to filter only Folders, Docs, and Items *without* requiring all panels to close and be re-opened.

***Changed All Dialogs to Retain Last Opened Position***

Every dialog box and window in PowerFlow now remembers where it was last positioned so that when it is re-opened it will appear in the same location and with the same size. This is especially useful for users with multiple monitors, as the dialogs can be positioned where desired and they will retain their position each time they are opened.

***Split Multi-Page TIF Files***

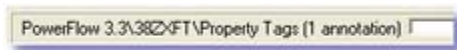
The Import Data dialog has a new feature (enabled by checkbox), *Split Multi-Page TIF Files*, that allows a user to have PowerFlow split multi-page TIF files during data import.

***Help Files***

Help files have been updated with new material and now include “bread crumbs” (at the top of a displayed topic) to aid navigation. “Bread crumbs” are hotlinks that go back up the hierarchy of help topics to the major parent topic.

***Image Annotation Counter***

If an image contains one or more annotations, whether hidden or not, there is now an indication of the number of annotations in the image at the top of the viewer:



Note that this information displays *only* if the image has at least one annotation.

***DBISAM Updated***

Upgraded DBISAM to version 4.25, Build 6.

***Data Import Speed Optimized***

Data import speed has been improved and is now about 40% faster.

***Progress Bar***

A progress bar has been added to the PFUploader program to indicate the progress of file uploading. PFUploader now also allows sorting of the files by filename, date, and size.

### **Microsoft Excel**

A known bug in the Microsoft Excel driver for ODBC requires that when importing Excel data into PowerFlow, *every* value in each column must be of an identical *type*. For example, if a column consists of several text entries, then all numeric values in that column **must** start with a single quote ( ' ) to mark the value as text instead of numeric; otherwise, data will get dropped during the import process. A **better** workaround is to use CSV files instead of Excel, as mixed data is not an issue with CSV files.

### **Additional Enhancements**

This version includes the following new utilities to the PowerFlow product line, introduced in the 3.3 version of the PowerFlow software.

- ① Note: These are not a part of PowerFlow itself, but separate utility applications (.exe files) that are included in the standard PowerFlow installer and may be launched separately by the user.

#### **PFSetup**

- New, easier to use, installer.
- Ability to add or remove PowerFlow add-ons at any time.
- Increases speed of Help installation (on future updates).
- ① During PowerFlow installation, PFSetup might ask you to reboot the computer to finish the installation of PowerFlow. If the reboot message shows up, it means that one or more of the components of PowerFlow were running while the PowerFlow installer tried to install those components. In this case, verify that the following programs are *not* running and if they are running, close them and install PowerFlow again without rebooting the computer: PowerFlow.exe, PFSservice.exe, DbSrvr.exe, dbsys.exe, srvadmin.exe, PFUploader.exe, and PFSplitter.exe.

#### **PFSplitter.exe**

- Allows vault builders to *split* vaults into common versus custom settings.
- Update function allows the split vault to be updated easily when changes occur.

#### **PFUploader.exe**

- Wraps up the Import Items functionality of PowerFlow into a stand-alone application.
- Allows users to import Items into PowerFlow without requiring a copy of PowerFlow.
- Allows remote uploading of data (Items) with one-button ease.
- Also allows updating into remote PowerFlow sessions under Terminal Services.

### Application Compatibility

- No issues have been found when PowerFlow is installed and used on Windows Server 2003 SP2.
- No issues have been found When MS SQL server 2005 SP2 is used to store the PowerFlow software data.

Other than the following known issues, PowerFlow works fine on Windows Vista:

- PowerFlow Fax functionality doesn't work (the fax drivers are incompatible).
- **–ini** startup option should be used to store the PowerFlow temporary folders and .ini file in the *%userprofile%\AppData\Local\PowerFlow\PowerFlow.ini* location so that Vista UAC (User Account Control) and File Virtualization doesn't cause any problems with PowerFlow.
- For SQL server storage vault, add **Persist Security Info=True** to the Additional Parameters field under the SqlServer tab in Vault Structure.
- Fixed and Live drop-down list for the filter's condition value in Edit Filters dialog appears blank.
- If the Import Data source file contains the Items name (*not* the absolute path to Items) and Items are in the *same* folder which contains the Import Data source file (xls, csv, txt, and so forth)—and you are using Windows XP—Import Data works fine. It imports the items into PowerFlow as expected.

However, if the same Data Import is run on Windows Vista, PF does *not* import the items into PowerFlow. The Items panel in PowerFlow shows the word: **missing**.

If the Import Data source file specifies the *absolute* path of the items, then PowerFlow works fine under the Vista OS.

If the import source file and items are placed right under the root drive (such as **C:\** or **D:\**), then Import Data works fine under Vista and the import data source file doesn't need to have the absolute path to the items location.