

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 3.7.

Additions and Enhancements

This release of PowerFlow 3.7 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 3.7 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!

Auditing and Change Management

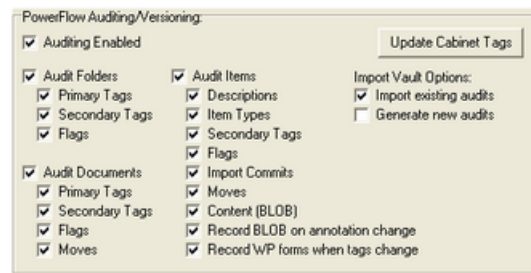
The auditing function in PowerFlow prior to this release (*Audit Review*, from the *Vaults* menu) has been augmented with a powerful, comprehensive and complementary function: *Show Audits*, accessed from the *Filter* menu. In short, *Show Audits* displays only documents—in the list area—that have been 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.



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.

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.

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.

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.