

nFORM Release Notes

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# Overview / Highlights

Windsor is dedicated to continuously working to improve the nFORM system for the user community. As such, new versions of the application are developed and released on a regular basis. This latest release of the system is nFORM version 4.17.

This release was composed primarily of the work needed to implement new features in nFORM such as:

* Improved sign-in screen formatting, enhancing the user experience.
* Support for populating control lists from the Data Hub, streamlining data retrieval.
* Enhanced wording in various modals, making system interactions more user-friendly.
* Improved handling of row summaries in Data Grid controls, providing greater flexibility for form designers.
* Error icons indicating control formula issues at both the section and control levels, simplifying issue detection.

In addition, several system defects were addressed.

This document covers the changes to the nFORM from version 4.16 to the release of version 4.17 for nFORM integrated implementations.

# New Features

### DataGrid

#### Standalone Stories

##### Add Tag Value to Table Configuration Screen

JIRA Ticket: NFORM-9030

Description:

In the advanced table and DataGrid control editing interfaces, the included control's tag has been added to the table. This enhancement assists form designers in distinguishing between controls more effectively during the editing process.

Fix Version(s): 4.17

Reported/Requested By: Windsor

##### Add Ability to Summarize Columns in DataGrid (New Feature)

JIRA Ticket: NFORM-9066

Description:

The DataGrid control now allows users to summarize columns in a table. This includes the following options and can be controlled within the individual controls within the DataGrid:

* Count
* Sum
* Minimum
* Maximum
* Average

This new feature is a valuable addition to the DataGrid control and will make it easier for users to analyze data in tables. The ability to summarize columns and add multiple summarization rows will be helpful for a variety of tasks, such as budgeting, forecasting, and reporting. The Excel integration will also make it easier for users to share their data with others.

Fix Version(s): 4.17

Reported/Requested By: TDEC

##### Add Calculated Control to DataGrid

JIRA Ticket: NFORM-9067

Description:

Form designers can now utilize the powerful Calculated control in DataGrids, opening up new possibilities for their designs.

Fix Version(s): 4.17

Reported/Requested By: TDEC

##### Summary Row Values in DataGrid to be Accessible for Document Templates

JIRA Ticket: NFORM-9127

Description:

Document templates can now access and utilize calculated row summaries configured by form designers within datagrid controls.

Fix Version(s): 4.17

Reported/Requested By: TDEC

### Emails

#### Standalone Stories

##### Improve Navigation Paths from Emails When Opening Submissions

JIRA Ticket: NFORM-9163

Description:

This update improves the navigation experience for email recipients accessing form submissions via direct links. Clicking on an email link will now intelligently direct users: if the submission is in draft status, they will be taken directly to the edit screen, streamlining the submission process; for submissions in other statuses, users will land on the submission overview page. This enhancement aims to eliminate confusion, particularly for draft submissions, resulting in a more intuitive and user-friendly experience while also reducing support efforts.

Fix Version(s): 4.15

Reported/Requested By: Oklahoma DEQ

### Form Design

#### Standalone Stories

##### Instruction Control Formatting Improvements

JIRA Ticket: NFORM-6550

Description:

Instruction Control formatting has been improved, enabling users to apply various formatting options like links, bold text, italics, carriage returns, and more within the control. Users can now insert multiple links in a single Instruction Control, streamlining formatting and reducing the need for multiple controls. This enhancement also addresses the reduction of excessive spacing above and below instructions, resulting in a more efficient and visually appealing design.

Fix Version(s): 4.17

Reported/Requested By: AR, NY, Windsor

##### Support the Ability to Populate Lists from Data Hub

JIRA Ticket: NFORM-6627

Description:

nFORM now supports the ability to populate control lists directly from the Data Hub, allowing users to create customized lists based on specific criteria such as individuals, permits, or sites, thereby enhancing data accessibility and flexibility.

Fix Version(s): 4.17

Reported/Requested By: SC, Windsor

##### Provide Visual Indicator For Formula Issues (on Sections and Controls)

JIRA Ticket: NFORM-8918

Description:

The resolved issue adds visual indicators for formula errors within the form designer. Previously, when control tags changed, controls were moved, or controls were deleted, formulas sometimes became invalid, but detecting these issues required opening each control or reviewing validation lists during form publishing. With the resolution, error icons are now displayed at both the section and control levels in the form designer, making it easier for form designers to quickly identify and address formula-related problems without the need to inspect each control individually.

Fix Version(s): 4.17

Reported/Requested By: Windsor

##### Expose Attachment Properties to Formulas

JIRA Ticket: NFORM-9180

Description:

The ability to enforce attachment requirements based on confidentiality has been added. It allows attachment properties to be accessed in the formula runner, enabling dynamic display and the requirement of other fields on the form depending on whether an attachment is marked as confidential. This ensures that both the full and redacted versions of confidential attachments are consistently provided, improving compliance.

Fix Version(s): 4.17

Reported/Requested By: AL

### Manage User Profile

#### Standalone Stories

##### Unlock Account Instructions

JIRA Ticket: NFORM-7587

Description:

The user experience when encountering a locked account has been improved. Users will now receive clear instructions on how to request the unlocking of their account directly from the Sign-in Page. This includes displaying the admin email address for the application and, when relevant, the form's contact email address. These enhancements facilitate a smoother account recovery process.

Fix Version(s): 4.17

Reported/Requested By: NH

### Submission Wizard

#### Standalone Stories

##### Allow Access to the "Please Describe" Value in the Formula Builder

JIRA Ticket: NFORM-9126

Description:

Form designers can now access the "Please Describe" value in the formula builder. An example of this syntax can be seen below:

Single\_Select\_Control\_Tag.other

Fix Version(s): 4.17

Reported/Requested By: Windsor

### Submission Wizard - Data Entry

#### Standalone Stories

##### Rebuild Manage Shared Access to Submission Page

JIRA Ticket: NFORM-8851

Description:

The manage shared access screen has been updated with a new look and feel. The screen is now modal, which means it opens inline without losing state. The following external roles can be added to a submission: editor, contributor, submission viewer, and signer. The Manage Access button on the Overview screen has been moved below the Fees button for better visibility. The signing state is now displayed when appropriate but users cannot manage it through this screen. In addition to these changes users can now be removed from the submission group, which allows for the transfer of ownership from one user to another.

Fix Version(s): 4.17

Reported/Requested By: Windsor

### Submission Wizard - Signing

#### Standalone Stories

##### Allow Internal Users to "Skip" Signing

JIRA Ticket: NFORM-7978

Description:

The automatic circumvention of signing processes for internal users has been rolled back and replaced with a new flow. When an internal user arrives at the Signing step, they are now presented with an additional piece of UI that offers them the chance to skip signing. This allows internal users to skip signing for testing purposes, or if they do not need to sign the document. This change makes it clear to internal users why signing is being skipped, and it also prevents the issue from affecting real clients in production.

Fix Version(s): 4.17

Reported/Requested By: Windsor

### User List

#### Standalone Stories

##### Rebuild User List Page in New UI/Design Standards

JIRA Ticket: NFORM-8597

Description:

We have improved the user search page in nFORM to make it more convenient and efficient. Users can now sort by organization and effectively find user information like the user's role and active status. In addition, there is a new action menu where users can reset password, deactivate, and lock accounts. These changes make it easier for users to find the users they are looking for, to get the information they need, and to manage user accounts.

Fix Version(s): 4.17

Reported/Requested By: VT, Windsor

### User Security

#### Standalone Stories

##### Remove the Ability for Admins to Lock Accounts

JIRA Ticket: NFORM-9338

Description:

 Administrators will no longer have the option to initiate locks, and the only alternative status they can assign, apart from "active," will be "inactive." As a part of this transition, the current checkbox metaphor for lock/unlock will be replaced with a button. This button will only be visible when a user's account is currently in the blocked state.

Fix Version(s): 4.17

Reported/Requested By: Windsor

### User Sign-In

#### Standalone Stories

##### Improve Sign-In Screen Across Application

JIRA Ticket: NFORM-6569

Description:

The sign-in screens throughout the application have been enhanced, resulting in improved formatting and user experience. These changes contribute to an overall improved visual appearance of the sign-in process.

Fix Version(s): 4.17

Reported/Requested By: VT

##### SMS Password Reset Self-Service

JIRA Ticket: NFORM-9087

Description:

We have added a new feature that allows users to reset their password using a mobile/SMS verification code. This feature makes it easier for users to reset their passwords, especially if they have forgotten their passwords.

If the user already has a mobile phone number on file, but it has not been validated, they will be prompted to validate their mobile phone number during the next login. The user can either update the number presented or accept the one already there and click "Validate" which will send a code via SMS to the mobile phone number provided. The user will then enter the code into the dialog to validate their mobile phone number.

Once the mobile phone number is on file and validated, the user will have the option to receive the temporary password via email or SMS anytime they click "Reset Password".

Fix Version(s): 4.17

Reported/Requested By: NH

##### Establish Timeout Config for Verification/Confirmation Code Expiration

JIRA Ticket: NFORM-9294

Description:

An expiration is being introduced for SMS codes, password reset emails, and registration confirmation emails sent to users. This method may also be integrated into the registration confirmation process. The expiration value will be included in SMS messages and email templates to ensure consistency and effectiveness in managing time-sensitive actions.

Fix Version(s): 4.17

Reported/Requested By: NH

##### First Time Sign In Flow Improvements

JIRA Ticket: NFORM-9331

Description:

This ticket aimed to enhance the initial sign-in process for first-time users. The improvements focused on efficiently incorporating address verification and SMS verification without being overly intrusive.

Fix Version(s): 4.17

Reported/Requested By: Windsor

# Bugs / Other

### DataGrid

#### Bugs/Other

##### Add Validation to Form Design of Data Grid Column Summary for XLSX Functions

JIRA Ticket: NFORM-9189

Description:

Now, if a non-XLS function is typed into the "Other" field, the system will display an error message, preventing the designer from saving the control. Previously, only numbers or special characters triggered an error, but this enhancement ensures that even unknown words in the "Other" field will result in an error message and prevent saving. These entries are also displayed in the form's Data Grid.

Fix Version(s): 4.17

Reported/Requested By: Windsor

### Form Design

#### Bugs/Other

##### Improve Formatting Capabilities for General Instructions

JIRA Ticket: NFORM-9201

Description:

 Enhancements have been made to the formatting capabilities of general instructions on forms. Form designers can now easily adjust text size and utilize various pre-existing formatting features.

Fix Version(s): 4.17

Reported/Requested By: Windsor

##### Form Designer Showing Inaccurate Required Control Asterisk

JIRA Ticket: NFORM-9210

Description:

Resolved an issue where advanced table controls displayed incorrect red asterisks for control requirements, improving accuracy in indicating required fields.

Fix Version(s): 4.17

Reported/Requested By: Windsor

### Formula Execution

#### Bugs/Other

##### Single Quotes in Name Values Cause Formula Issues

JIRA Ticket: NFORM-9337

Description:

An issue was reported related to a submission where server-side validation problems were encountered, leading to submission errors with a generic error message. This problem was attributed to calculated controls in the form that referenced certain user attributes, potentially causing errors in the server-side formula evaluation.

Fix Version(s): 4.17

Reported/Requested By: TDEC

### Submission Overview

#### Bugs/Other

##### Submission Overview Event-Log Issues

JIRA Ticket: NFORM-9353

Description:

This ticket addressed two issues. Firstly, it resolved the problem of duplicate event log entries (notably "WORKFLOW\_AUDIT" notations) appearing in the Submission Overview Event Log when a submission was revised, causing a cluttered event history. Secondly, it addressed the occasional "Send Email" event getting stuck in an "In Progress" status indefinitely, which occurred under certain scenarios like email feature disabling, preview mode submissions with undetermined recipients, or system exceptions, ensuring smoother email event handling.

Fix Version(s): 4.17

Reported/Requested By: VA

### User Sign-In

#### Bugs/Other

##### Password Reset Wording Improvements

JIRA Ticket: NFORM-9330

Description:

We have made refinements to the wording of various modal messages in three key areas: the "Reset Password" modal, the "Change Email" instructions, and the "Forgot Password - Email Option" confirmation message. These improvements were implemented to ensure that users receive more precise and user-friendly instructions and notifications, ultimately contributing to an improved user experience.

Fix Version(s): 4.17

Reported/Requested By: Windsor