

nFORM Release Notes

Release Number: 4.16

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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 tool are developed and released on a regular basis. The latest release of the system is nFORM version 4.16.

This release primarily focuses on implementing new features and enhancements in nFORM, including:

**Form Designer**

* Added the ability to Conditionally Require a Control.
* Introduced Group and Sort Tags to enhance the usability of the tag picker.
* Included Original Submission Start & Revision Dates as global variables.
* Provided the capability to determine control placement using Display After.
* Implemented the ability to set confidentiality at the Attachment Control Level.
* Improved the functionality of sections by separating the Duplicate and Add options for a repeating section.
* Enabled the option to disable/enable the Clear Button within sections.
* Introduced the ability for Select controls and all single value controls to inherit from calculated controls.

**Work Flow**

* Enhanced Step Actions by enabling Custom Email Content and Internal Data Controls (IDCs) for recipient selection.

**Document Templates**

* Streamlined testing and validation processes for improved ease of use.

**Submissions**

* Added a friendly "Form Not Available" message when attempting to open an unavailable form.
* Improved accessibility to unsubmitted/draft forms for users.
* Honor internal user signatures for forms that are marked as Internal

**Administrative/Reporting**

* Introduced the ability to delete a form for cleanup purposes.
* Provided a Form Configuration Inventory - Exported Report.
* Enabled access to nVisage Reports within nFORM (available for clients using nFORM + nVISAGE).
* Established the New Submission Report Viewer Role in nFORM (available for clients using nFORM + nVISAGE).

In addition, this release addresses several system defects, enhancing the stability and reliability of the platform. This document provides a comprehensive overview of the changes from version 4.15 to the latest release (version 4.16) in nFORM standalone implementations.

# New Features

### Configuration

##### Establish New Submission Report Viewer Role in nForm (nVisage)

***JIRA Ticket: NFORM-8846***

***Description:***

This ticket addresses the need to provide nVisage users with a way to access reports belonging to their organization through nForm. The solution is to create a new role called Submission Report Viewer, which can be assigned with organization-level scope. The role will have access to the Reports menu item and the Submission Reports page. A separate Report Designer Role is not needed as report designers will use the nVisage system directly. The existing Payment Report Viewer role has been renamed to PAYMENT\_REPORT\_VIEWER, and two new roles have been added: REPORT\_VIEWER and REPORT\_DESIGNER. Users in any of these roles, as well as Admin users, will see the Reports menu item.

***Fix Version(s): 4.16***

***Reported/Requested By: NDEP***

##### Add the ability to set confidentiality at the Attachment Control Level

***JIRA Ticket: NFORM-4215***

***Description:***

In the submission wizard, a new feature has been introduced to the attachment control, allowing documents added to the control to be marked as confidential. However, concerns have been raised about the potential management overhead for existing clients. As a solution, an "Allow Confidentiality" checkbox has been added to the attachment control, enabling applicants to mark documents as confidential if checked.

***Fix Version(s): 4.16***

***Reported/Requested By: AL, NH, Windsor***

### Data Inheritance

##### Import from Previous Submissions: Allow Type-ahead in Form Selection List

***JIRA Ticket: NFORM-8043***

***Description:***

The form designer's prefill tab now includes a typeahead search box for selecting a "Source Form" for data inheritance via the "Import from Previous Submission" feature. This enhancement helps form designers to more easily find their desired form in the long list of options available. With the new typeahead functionality, users can quickly search for and select the appropriate form by typing the first letter of its name, rather than having to manually scroll through the entire list.

***Fix Version(s): 4.16***

***Reported/Requested By: Windsor***

##### Allow Single Value Controls to Inherit from Calculated Control

***JIRA Ticket: NFORM-9036***

***Description:***

This update adds support for single value controls to inherit their value from calculated controls. The supported control types have been expanded and will now appear in the data inheritance mapping in the form designer. Going forward, users will be able to inherit data from any of the newly supported controls, including select, date, email, number, phone, time, and URL.

***Fix Version(s): 4.16***

***Reported/Requested By: Windsor***

### Document Generation

##### Document Templates: Improve Ease of Testing/Validation

***JIRA Ticket: NFORM-8215***

***Description:***

The Document Templates feature has been updated to improve ease of testing and validation for users. With the new changes, template building is now more user-friendly, making it more cohesive with the rest of the product. Previously, users often faced snags and blockers due to syntax errors, which could cause the entire document to fail. To address this, a Test Template area has been added below Upload Template on the Document Templates tab. This new feature includes a textbox for submission number and a button to run the test. Users can now quickly test their templates and receive a generated document or error message, ensuring that templates are validated before being used in a production environment.

***Fix Version(s): 4.16***

***Reported/Requested By: Windsor***

### Form Design

##### Ability to Delete a Form

***JIRA Ticket: NFORM-2286***

***Description:***

The form designer now allows users to delete forms and their versions by clicking the delete icon in the details tab of the form. However, if there are submissions for the form, it cannot be deleted. In such cases, the user needs to go to their ‘My submissions’ page and delete any submissions associated with the form before deleting it.

***Fix Version(s): 4.16***

***Reported/Requested By: Windsor***

##### Provide Ability to Disable/Enable the Clear Button

***JIRA Ticket: NFORM-8480***

***Description:***

During form creation, designers can now choose to disable the 'Clear Section' button on a section-by-section basis, preventing applicants from accidentally clearing out sections they have already further enhancing data integrity and user experience. To access this feature, simply edit the desired section in the form designer and select the 'Disable "Clear Section" Button' option.

***Fix Version(s): 4.16***

***Reported/Requested By: AL***

##### Form Configuration Inventory - Exported Report

***JIRA Ticket: NFORM-8767***

***Description:***

A new feature was added to the form designer's export functionality allowing the user to export form properties in an Excel format. Users can access this feature by clicking on "Export" at the bottom left and selecting "Export form properties." The exported properties include but are not limited to the form name, version, reference number, responsible organization, tag, identifying keywords, online submission availability, offline form availability, prefill options, certification statement, payment processing, and workflow processing steps. This feature can be used to document the settings on a per-section and per-control level for a form.

***Fix Version(s): 4.16***

***Reported/Requested By: NH***

Allow Custom Email Content for Step Actions / Allow IDCs for Recipient

***JIRA Ticket: NFORM-8937***

***Description:***

Users can now automate email notifications for individuals filling out unrestricted (anonymous) forms. The update introduces a new option in the Workflows area, allowing selection of "Internal Data Control" (IDC) recipients. Additionally, a custom email content designer is now available, empowering users to personalize the email's subject line and body. Improvements also include the ability to select a new recipient type, providing a list of IDC tags for selection, and ensuring submission links are included in templates based on user access.

***Fix Version(s): 4.16***

***Reported/Requested By: TDEC***

##### Separate the Duplicate and Add Options for Repeating Sections

***JIRA Ticket: NFORM-8890***

***Description:***

This release includes the ability for form designers to control the Add and Duplicate buttons for repeating sections separately. Previously, these buttons were controlled through the same setting, but now form designers can choose to disable either the Add or Duplicate button on a section-by-section basis. This added flexibility allows for a more tailored user experience, ensuring that the form behaves in a way that makes sense for the specific data being collected.

***Fix Version(s): 4.16***

***Reported/Requested By: AL***

##### Ability to Determine Control Placement Using Display After

***JIRA Ticket: NFORM-8912***

***Description:***

Efficiently arranging controls in a form is essential for optimal form design. To simplify this process, we have introduced an enhancement to the form designer that allows form designers to easily control the placement of newly added or existing controls. Using the 'Display After' field (above every control's tag field), designers can select a specific control to place the newly created. This feature saves time and increases efficiency, enabling designers to quickly create and arrange forms with precision and ease.

***Fix Version(s): 4.16***

***Reported/Requested By: Windsor***

##### Group and Sort Tags to Improve the Usability of the Tag Picker within Form Designer

***JIRA Ticket: NFORM-9011***

***Description:***

We've made significant improvements to the tag picker in the form designer to enhance usability. The tag picker, which is used by form designers to add tags to the formula builder, is now sorted by section, making it easier to find specific tags. Additionally, 'Global Variables' is now a category within the list, further streamlining the tag selection process. These enhancements provide a more organized and user-friendly experience, making it easier for form designers to create and customize their forms.

***Fix Version(s): 4.16***

***Reported/Requested By: NVDEP***

##### Add ability to Conditionally Require a Control

***JIRA Ticket: NFORM-7919***

***Description:***

Form designers can now use the same functionality as calculated controls and conditional visibility to make controls conditionally required. By selecting the 'Conditional' option under the 'Required' field when editing a form, designers can access a formula builder to add conditionality to the control. This feature provides greater flexibility and customization, allowing form designers to create more nuanced and context-specific form filling experiences for applicants.

***Fix Version(s): 4.16***

***Reported/Requested By: All***

Visibility to Internal Data Control Properties on Published Form Design

***JIRA Ticket: NFORM-9054***

***Description:***

The implemented feature enables users to access and view the properties of Internal Data Controls (IDCs) on published forms. Previously, only the IDCs were listed without the ability to open them and view their properties in a read-only mode. With this update, users can now utilize a magnifying glass icon to open the IDCs in read-only mode, allowing them to explore and access the properties associated with each IDC.

***Fix Version(s): 4.16***

***Reported/Requested By: Windsor, NY***

##### Visibility to Prefill Settings on a Published Form

***JIRA Ticket: NFORM-9055***

***Description:***

Form designers can now use the same functionality as calculated controls and conditional visibility to make controls conditionally required. By selecting the 'Conditional' option under the 'Required' field when editing a form, designers can access a formula builder to add conditionality to the control. This feature provides greater flexibility and customization, allowing form designers to create more nuanced and context-specific form filling experiences for applicants.

***Fix Version(s): 4.16***

***Reported/Requested By: Windsor***

Allow Visibility to Workflow Step Action Properties on Published Form

***JIRA Ticket: NFORM-9056***

***Description:***

Users can now access and view all properties of a Workflow Step Action even after the form is published. This improvement becomes particularly valuable with the introduction of the new Custom Email builder, allowing users to efficiently manage and customize step actions in their published forms.

***Fix Version(s): 4.16***

***Reported/Requested By: Windsor***

Add the ability to set confidentiality at the Attachment Control Level

***JIRA Ticket: NFORM-4215***

***Description:***

Form designers now can customize the visibility of the confidentiality checkbox, allowing them to tailor its display based on specific needs. This enhancement addresses concerns raised by existing clients and reduces potential management overhead. For migrated forms, the default setting for the confidentiality checkbox is "off," ensuring a seamless transition. This improvement offers improved usability and flexibility, empowering users to manage confidentiality settings effectively.

***Fix Version(s): 4.16***

***Reported/Requested By: AL, NH, Windsor***

### Form View

##### Add Friendly "Form Not Available" Message When Attempting to Open Unavailable Form

***JIRA Ticket: NFORM-8760***

***Description:***

Previously, if a user encountered an error when attempting to access a form, they would receive a generic error message that did not provide specific information about the cause of the issue. This lack of clarity could make it difficult for users to troubleshoot and resolve the issue. However, with the new update, users will receive a more informative error message that identifies the specific reason for their inability to access the form. This improvement will help users more quickly identify and resolve issues, making for a more efficient and user-friendly experience.

***Fix Version(s): 4.16***

***Reported/Requested By: AR, Windsor***

### Other

##### Upgrade/Replace CKEditor to Provide More Flexibility/Options

***JIRA Ticket: NFORM-2620***

***Description:***

We have replaced the previous text editor, CKEditor, with TinyMCE to enhance the rich text editing experience for our users and form designers. The new editor offers a wider range of text formatting and styling options, along with improved performance and stability. We believe this change will significantly improve the overall user experience and make it easier to create and edit content within our platform.

***Fix Version(s): 4.16***

***Reported/Requested By: VT***

### Reports

##### Provide access to nVisage Reports within nFORM

***JIRA Ticket: NFORM-8857***

***Description:***

We're excited to announce the release of a new feature in nFORM - the Submission Reports page. This page allows nVisage users to easily access submission reports associated with their organization, all within the nFORM platform.

With the new Submission Reports page, users can view a list of reports associated with their organization, pulled directly from nVisage. This list can be filtered based on organization, providing an easy way for users to find the data they need.

To ensure a seamless user experience, the Submission Reports page is designed to preserve all grid functions on the report, including sorting, paging, and filtering. Users can even follow hyperlinks within the report, launching a new window in context.

To further enhance usability, certain actions from the nVisage page are suppressed when opened in the Submission Reports page, so users can focus solely on the data they need.

***Fix Version(s): 4.16***

***Reported/Requested By: OK***

### Formula Execution

##### Add Milliseconds to Formula Runner Now() Function

***JIRA Ticket: NFORM-9009***

***Description:***

The formula runner's "now()" function previously ignored milliseconds, resulting in zero values for the last three digits. This affected calculations involving time-based functions. To address this, milliseconds have been added to the "now()" function in the formula builder within the form designer, enabling more accurate time-based calculations.

***Fix Version(s): 4.16***

***Reported/Requested By: Windsor***

##### Add Original Submission Start Date & Revision Start Date to Global Variables

***JIRA Ticket: NFORM-8995***

***Description:***

This release introduces an enhancement to the calculated control in the form designer. Users can now select the Original Submission Start Date and Revision Start Date from the tag picker in the Global Variables section of the calculated control. Previously, users had to perform complex formula calculations to derive these dates. With this enhancement, they can easily access and utilize these variables in their calculated controls, streamlining their workflows and ensuring accurate tracking of revision dates.

***Fix Version(s): 4.16***

***Reported/Requested By: Windsor***

# Bugs

### Bugs/Other

##### Max & Min Functions Show Infinity When No Array is Given

***JIRA Ticket: NFORM-8975***

***Description:***

In the formula builder, the max and min functions previously displayed "infinity" when no array was specified. However, we have improved the wording so that the user will now see "none specified," which more accurately communicates what is needed from the user.

***Fix Version(s): 4.16***

***Reported/Requested By: Windsor***

##### Mark Complete Button Missing After Revision

***JIRA Ticket: NFORM-7138***

***Description:***

Addressed an issue that caused the "Mark Complete" button to not display in the Submission Wizard when working with Correction Requests. Refreshing the form would make the button appear correctly. This was due to a race condition on the form and was resolved.

***Fix Version(s): 4.16***

***Reported/Requested By: ADEM, TDEC, NY, VT, AK, SC***

##### Pagination page number field broken and displaying NaN

***JIRA Ticket: NFORM-8990***

***Description:***

A fix was made to address an issue with the page navigation feature on the "my submissions" and submission dashboard pages when searching for results across multiple pages. Previously, when attempting to navigate to a specific page by entering a page number and pressing enter, the system would not respond properly and would instead display "NaN" in the number field. However, this issue has since been resolved, allowing users to navigate the pages again.

***Fix Version(s): 4.16***

***Reported/Requested By: VT***

Cascading Lists Issue. Options list of child control not getting updated when parent control is in a different section.

***JIRA Ticket: NFORM-9027***

***Description:***

A bug related to cascading lists in nFORM has been resolved. Previously, an issue existed where the options list of a child control would not update correctly when the parent control was placed in a different section. Our team has successfully addressed this issue, ensuring that the relationship and linkage between parent and child lists are maintained across sections. With this fix, users can now enjoy uninterrupted cascading functionality, allowing for seamless data selection and improved form usability.

***Fix Version(s): 4.16***

***Reported/Requested By: VT***