

Windsor Solutions, Inc.



Agency User Guide

Revision Date: Thursday, July 16, 2020



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2 Welcome to Windsor's nFORM Help Tool

Using this application, members of the regulated community are able to interact with the agency in a variety of ways. Users can apply for permits and licenses, grants and loans, meet electronic reporting obligations, request inspections, and make complaints.

Forms may be submitted with either an electronic signature or via a wet signature, and payments can be made online.

3 Registration and Profile Management

As a system user, you will have the ability to manage your profile and user information.


When agencies possess a centralized agency authentication system, the system can force users to register and authenticate through a third party authentication system. When this is utilized, some properties of the user profile can no longer be edited.

The primary topics in this area include:

- **Sign In (Section 3.2):** The details of how to sign in to the system.
- **Register User Account (Section 3.1):** The details of how to register a new user account.
- **Change Password (Section 3.3):** The details of how to change your user account password.
- **Reset Password (Section 3.4):** The details of how to reset your user account password.
- **Change Email Address (Section 3.5):** The details of how to change your user account email address.
- **Request Electronic Signature Rights (Section 3.6):** The details of how to request electronic signature rights your user account.

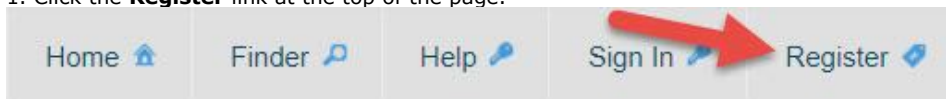
3.1 Register User Account

To access the system you will need to register with the system by creating a user profile. User profiles are used to establish secure access to the system. After creating your new account, a welcome email will be sent to the provided email address with a confirmation code. Your account will not be activated until you open this email, copy the confirmation code and enter the confirmation code back in to the system.

 If the verification email is not received, please confirm the email was not filed to the users junk/spam folder.

Steps

1. Click the **Register** link at the top of the page.



2. Fill out the **User Identification** section. The information you provide in this area will be the credentials you use to access the system and are all required. The email address you provide will be used for email alerts from the system.
3. If you are affiliated with an organization, please provide the name of your organization in the **Organization Affiliation** area.
4. Fill out the **Mailing Address** section.
5. Click **Save** button to continue.
6. If an error is presented, resolve the issue presented and click the **Save** button to continue. Repeat step as necessary.
7. After you have successfully submitted your information the confirmation code entry screen will be presented. At the same time, an email will be sent to the email address you entered and confirmation code will be provided in the email.


An email has been sent to test1@test.com. Please check it and enter the confirmation code below.

Confirmation Code *

 Confirm Email

8. Enter the received confirmation code in the **Confirmation Code** field and click the **Confirm Email**

button.

 If the confirmation code entry screen is no longer open and available, attempt to Sign In to the system. After attempting to sign in the system will present a message on the Sign In dialog noting that your account is not yet confirmed and is considered pending. Click the **Resend Confirmation Code**. A new confirmation code email will be sent to the provided email address and the confirmation code data entry screen will be presented. Enter the received confirmation code in the **Confirmation Code** field and click the **Confirm Email** button.

3.2 Sign In

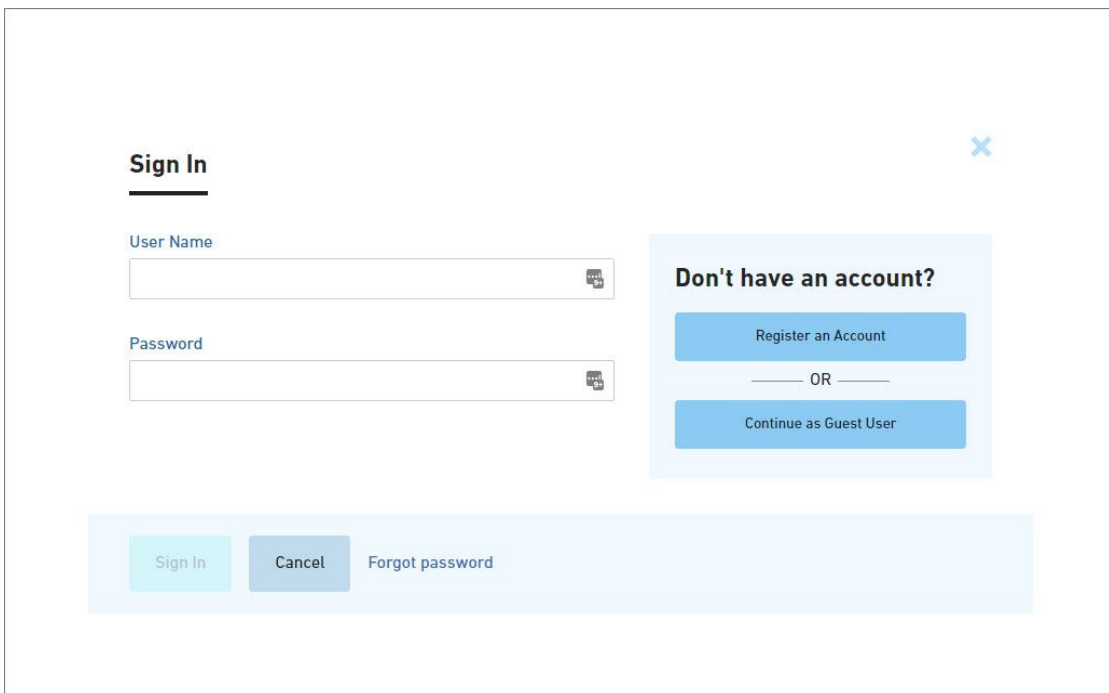
After you have registered successfully and confirmed your email, you can sign into the system.

Steps:


1. Click the **Sign In** link at the top of the page. Note: if the Sign In link is not available, you may already be signed in.




2. Enter the **User Name** and **Password** you provided during registration.



3. Click the **Sign In** button.

 If the user does not have an account, click on the **Register an Account** button to initiate the user registration process.

 Some forms support submission of forms as a guest (no logged in). When available, the user can click on the **Continue as Guest User** button to continue the submission process without logging in to the system. Please note that if Guest User access is utilized, the user will not have the ability to track progress of the submission via the system.

3.3 Change Password

This is the area where you can change your password.

Steps:

1. Sign in to the system.
2. In the upper right hand corner, click on the name you provided for the account.



3. Click the **change your password** link.

User Identification

Prefix:

First Name: * Middle Name: Last Name: *

Email Address:
 demo@windsorsolutions.com
[change your email...](#)

Password:
[change your password...](#)

Phone Number(s):
 * * Ext.

[add more phones...](#)

4. Enter your current password, your desired new password and confirm your new password.

5. Click the **OK** button.

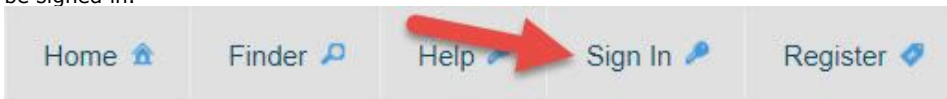
6. If an error is presented, resolve the issue presented and click the **OK** button to continue. Repeat step as necessary.

3.4 Reset Password

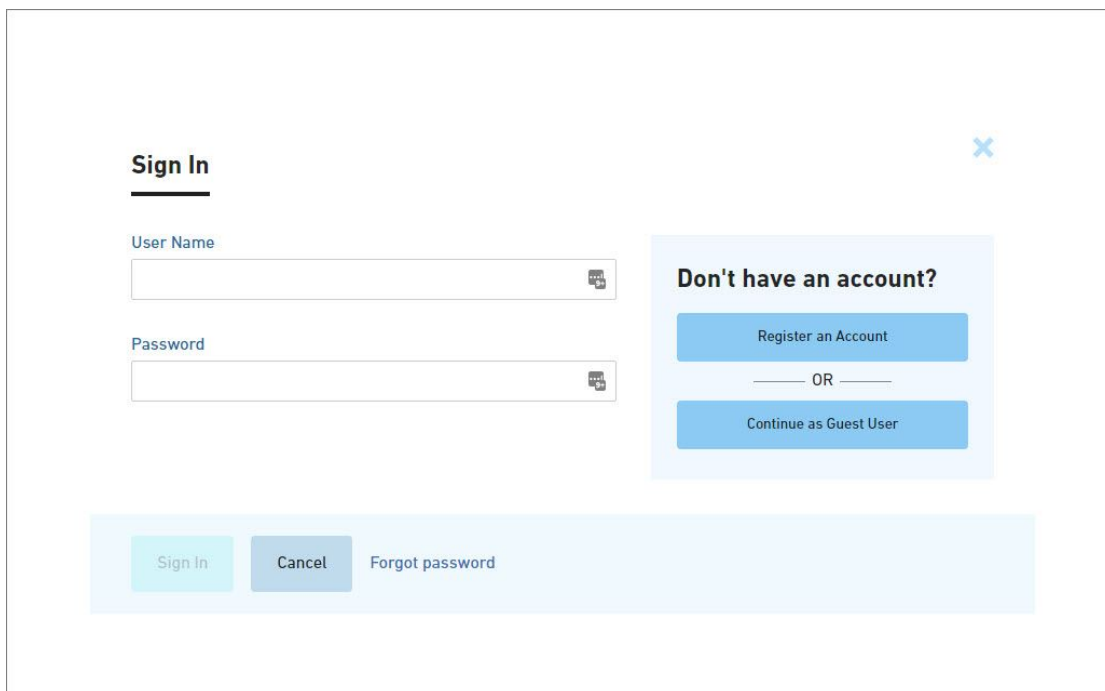
This page describes the steps to reset your password.

Steps:

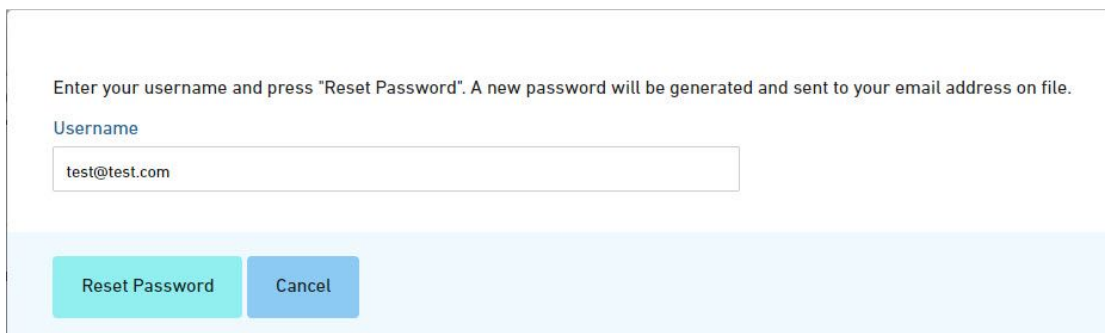
1. Click the **Sign In** link at the top of the page. Note: if the Sign In link is not available, you may already be signed in.




2. Click the **Forgot Password** link at the bottom of the dialog.



3. Enter your account email address in the **Username** field.



4. Click the **Reset Password** button.

 If the entered account is considered an e-signature account, the user will be required to correctly answer one of the user's established challenge questions.

5. If valid, a temporary password will be sent to the account specified.

6. Upon the next Sign In attempt, the user will be required to change their password.

3.5 Change Email Address

This area is used to change your email address in the system if you are switching email addresses or just wish to use a different one.


Steps:

1. In the upper right hand corner, click on the link which displays your name.
2. Click on the **change your email** link.


User Identification

Prefix:


First Name: * Middle Name: Last Name: *


Email Address:
 demo@windsorsolutions.com
[change your email...](#) 

Password:
[change your password...](#)

Phone Number(s):
 * * Ext. 
[add more phones...](#)

3. When prompted, enter and confirm your new email address.
4. After successfully submitting the email address change request, the account will be set to pending until the email address is verified by entering the code you receive via email. After the code is confirmed, the user will have the ability to sign in to the system.

 If the verification email is not received, please confirm the email was not filed to the users junk/spam folder.

 You will not be able to use the system until you have verified your email.

5. Sign in to the system using your new email.

3.6 Request Electronic Signature Rights

This page describes the steps to request Electronic Signature rights to allow for the provision of online signatures, if available.

Steps:

1. Sign in to the system.
2. Click your name at the top of the page to open your user profile page.
3. Click the **Download Electronic Signature Agreement** link at the top right of the page and download the document.
4. Review, fill out and sign the downloaded document and return to the agency at the mailing address provided on the document.
5. The agency will notify you if/when you are approved for and receive Electronic Signature rights.

4 Form(s) Identification

The first step in the submission process is to identify which forms will need to be submitted based on the activities you are attempting to be permitted or the type of approval you are requesting. There are two primary options supporting form selection. These two options include:

- **Select an Organization (Section 4.1):** Select the appropriate forms based on the organization (Air, Water, etc.) who issues the form(s) you require.
- **Searching for a Form (Section 4.2):** Search for the appropriate forms based on the name (or other properties) of the form you require or by describing the activity you are seeking approval for.

4.1 Select an Organization

This area describes how to select an organization from the organization browser and view the organization information page. From an organization, all the forms will be listed and any organization specific instructions/information will be provided.

The screenshot displays a user interface for selecting an organization. On the left, there are three sections: 'Organizations' with a 'Select Organization' dropdown menu, 'Forms' with a 'Form Finder' button, and 'Frequently Asked Questions' with three questions. On the right, the 'Hazardous Waste Section' is detailed, including a description of its role in protecting public health, permit application information, contact details (address and phone), additional links, and a list of forms such as 'Part A Hazardous Waste Permit Application' and 'Used Oil Permit Application'. A footer note suggests using the 'Form Finder' if a specific form is not found.

Steps:

1. Click on the **Select Organization** button.




2. Mouse over the organization list and highlight the desired organization.
3. Click on the desired organization.
4. After selecting an organization, the details for the organization will be displayed as well as any forms related to the organization.

4.2 Searching for a Form

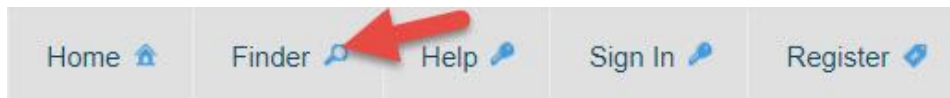
This area describes how a user will search for a form within the system. Forms can be located by searching for a form using the **Form Finder** tool and then selecting the form from the **Recommended Forms** links.

The search tool provided allows you to either search for a specific keyword, or a natural language search in which you type in the activity that you are trying to do and it will attempt to identify the form you are looking for.

 Example of a natural language search: I need a form for Drinking Water Eligibility

Steps:

1. Click on the **Finder** link in the header.



2. Type in keywords you would like to use to identify the appropriate form(s) (example: wind power, wind, offshore) or describe the activity you would like to perform.

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Help

Use this page to identify the forms which may be most appropriate for your needs.

If you know the form you are looking for, enter the name of the form in the Form Search area.

If you are not sure which forms you need, describe the activity you are looking to in the Form Search area and the system will recommend the forms that may be needed.

Once the appropriate forms are identified, click on the name of a form to view the details of that form and to initiate the form submission process.

Organization Browser

To find information specific to an organization, please identify the organization using the Select Organization button below.

Select Organization ▾

Form Search

To search, type in what you are looking for and results will appear automatically.

You can search for:

- Form names
- Keywords
- Description of the activity you need to perform

Matching forms will appear in a list below.

varia

Recommended Forms

Based on your description, the following 3 forms may match your needs.

[Application for Variance - Primarily Concerning Large Capacity Cesspools](#)
Variances for Large Capacity Cesspools

[Application for Variance](#)
Variance Application

[Application for an Underground Storage Tank Variance](#)

This form is to be used when the owner or operator requests a variance from the UST regulations.

3. Potential matches will begin to appear under the **Recommended Forms** heading. The forms will be ordered based on applicability to your provided keywords or the activity you described.

4. Click on the form name link for the form that best matches your needs. Please review the summary of each returned forms to ensure relevance to your specific needs.

5 Submitting Form(s)

After you have selected the form you want to submit, the next step is to provide the information required, submit the form and to pay any applicable fees for the form.

This section will describe the primary options for submitting a form. The topic(s) in this area include:

- **Starting and Submitting a Form:**
 - **Submit a Form (Section 5.1):** The details of how to submit a form for review.
 - **View Users with Access to Submission (Section 5.2):** The details of how to view users with access to the submission.
 - **Share Submission (Section 5.3):** The details of how to share access to the submission with other users.
 - **Identify Users Currently Viewing/Editing the Submission Section (Section 5.4):** The details of how to identify users who are currently viewing/editing the submission section the user is working within.



See the **Managing Your Submission (Section 6)** topic for information pertaining to managing your submission, once started.



Please note that a submission **must be officially certified, submitted and in some cases paid for** by the submitter for it to be available for review by the agency. The agency will **not** have visibility or access to draft submissions that are not yet submitted. The agency will **not** review form submissions until any associated fees have been paid in full.

5.1 Submit a Form

After selecting the form to submit, the wizard will walk the user through the process of providing the information required by the issuing department or program, submitting the form and printing the payment voucher for any associated fees with the form and to paying any applicable fees for the form. Each step included in this process is detailed below.



The sections present for a given form, will depend on the needs and configuration of the form in question.



Please note that a form **must be officially certified, submitted** by the submitter for it to be available for review by agency staff. The agency will **not** have visibility or access to draft forms that are not yet submitted. The agency will **not** review form submissions until any associated fees have been paid in full.

Form Instructions

The Form Instructions provides the user with information specific to the selected form and information pertinent to processing submissions of this form type. Click **Begin Form Entry** button to start a new online submission.



When available, the user has the option to download a paper based, mail-in, submission form. This option can be utilized by clicking on the **Download Mail-In Form** button, if visible.



Typically, a user will need to be signed in to the system prior to submitting a form. When enabled, the user will have the option to submit a form as a guest (without signing in to the system). This option can be utilized by clicking on the **submit as a guest** link, if visible, which will be displayed where the **Begin Form Entry** button is normally displayed.

If present, the user can click upon the **Download Mail-In Form** button to download a PDF version of the form for offline entry, population and review. This form will be mailed back to the agency as instructed within the form. Note: processing of these mail-in forms can be slower than when using of the online system.

If present, the user can click upon the **Print Blank Form** button to download a PDF version of the form that can be used for reference and investigatory purposes only. This form is not intended to be used as a mail-in form and may not be accepted by the agency, if received in this format.

Application for Variance

VERSION 7.4

INSTRUCTIONS

The Wastewater Branch has two types of Variance Applications. This Application for Variance should be used for all Chapter 11-62, Hawaii Administrative Rules, Wastewater Systems variance requests **excluding** projects that involve Large Capacity Cesspools (LCCs). Projects involving LCCs that need a variance from chapter 11-62, shall use the The Application for Variance - Primarily Concerning Large Capacity Cesspools.

All applications for variances shall be submitted with a filing fee of \$300 for each application. Additionally, the applicant shall pay all fees assessed for publishing the legal notice(s) for each variance application. If a public hearing is required, the applicant shall pay all fees assessed for the publishing of the public hearing notice(s).

Applications for renewal of variances shall be submitted one hundred eighty days before the expiration of the variance. A filing fee of \$150 shall be submitted with each application for renewal. Additionally, the applicant shall pay all fees assessed for publishing and legal notice(s) and public hearing notice(s).

Failure to renew a variance within the specified time will result in the termination of the variance and require the applicant to apply for a new variance.

Please contact the Wastewater Branch at 555-5555, should you have specific questions about our Variance process.

FREQUENTLY ASKED QUESTIONS

[How much are the processing fees?](#)

CONTACT INFORMATION

Contact

Wastewater Branch
888 SW 1st Ave.
Bldg 1, Suite 432
Portland, OR, 97221

Payment Remittance Address

111 SW 1st St.
Portland, OR 97223

CONTACTS

Phone : 555-555-5555
Fax : 444-444-4444

ADDITIONAL LINKS

Wastewater Website
Chapter 11-43, Administrative Rules

Begin Form Entry

Download Mail-in Form

Processing Info Section

If present, the **Processing Info** section allows the user to provide generic processing information about the form submission, as required and select the fee categorization, if applicable. When comfortable with the information provided and displayed, click **Next Section** button to move to the data entry sections in the process.

At any time, the **Save Progress** button can be clicked to save the form submission in its current state and conclude data entry for the time being. The submission wizard can be reopened by clicking on the **History** link at the top of the form and selecting the **Edit** button next to the appropriate form submission.

Navigate between sections using the **Next Section** buttons, at the bottom of the wizard or by clicking on a section name in the left panel.

Application for Variance Submission HNX-6GE5-8MX8T Revision 1 Form Version 7.4

Last saved a minute ago

SAVE PROGRESS

- Processing Info
- Contact
- Location
- Individual Authorized to Act for Applicant
- Identify Section of Chapter 11-62
- Specific Information
- Review
- Certify & Submit

Processing Info

Please specify the following:

- The reason for the submission, e.g., new permit or permit modification. If no options are available, the default value is shown and cannot be changed.
- The ADEQ Facility Identification Number (AFIN) for your facility, if available.
- The relevant fee if requested below. Not all applications will indicate a fee at this point. This does not indicate a fee is not required at a later time; you will be notified of any additional necessary fees.

Submission Reason

New
▼

Fee Categorization

*
▼

Applicable Project Types

▼

NEXT SECTION
Contact

Data Entry Sections

During the **Data Entry Sections** of a form submission, you will be required to provide the information as specifically requested by the form. A form will be divided into one or more data entry sections that are relevant to the form in question. The user is not required to be complete a section to navigate to other sections of the form.

To complete data entry, all questions will need to be reviewed and answered with valid entries. All required fields must be entered. Required fields will be marked with a yellow or red asterisk in the upper left corner of the field.

As an indication of the status for each section (sections are listed on the left), the following visual cues are provided by the system:

Data Entry Sections

During the **Data Entry Sections** of a form submission, you will be required to provide the information as specifically requested by the form. A form will be divided into one or more data entry sections that are relevant to the form in question. The user is not required to be complete a section to navigate to other sections of the form.

To complete data entry, all questions will need to be reviewed and answered with valid entries. All required fields must be entered. Required fields will be marked with a yellow or red asterisk in the upper left corner of the field.

As an indication of the status for each section (sections are listed on the left), the following visual cues are provided by the system:



A white circle represents a section that has not yet been validated.



A black circle represents a section that is currently in use.



A red X represents a section with missing or invalid data entered.



A blue check mark represents a section that has all required information filled out and no invalid entries.



At any time, the **Save Progress** button can be clicked to save the form submission in its current state and conclude data entry for the time being. The submission wizard can be reopened by clicking on the **History** link at the top of the form and selecting the **Edit** button next to the appropriate form submission.



Navigate between sections using the **Previous Section** and **Next Section** buttons, at the top and bottom of the wizard, respectively, or by clicking on a section name in the left panel.



The data entry sections may present several different types of questions to capture the data that is required for submitting a particular form.

Default nForm Agency Users Guide

Application for Variance ⓘ
Submission HNX-6GE6-8MX8T Revision 1 Form Version 7.4

New Application \$300.00 ⚙️

Last saved a few seconds ago
SAVE PROGRESS

Processing Info
Contact
Location
Individual Authorized to Act for Applicant
Identify Section of Chapter 11-62
Specific Information
Review
Certify & Submit

PREVIOUS SECTION
Processing Info

CONTACT

NAME OF OWNER SEEKING A VARIANCE

* Full Name
* Title

MAILING ADDRESS

Address Line 1
Address Line 2
City State/Area Postal Code

VALIDATE ADDRESS

NEXT SECTION
Location

At any time, the **Save Progress** button can be clicked to save the form submission in its current state and conclude data entry for the time being. The submission wizard can be reopened by clicking on the **History** link at the top of the form and selecting the **Edit** button next to the appropriate form submission.

Navigate between sections using the **Previous Section** and **Next Section** buttons, at the top and bottom of the wizard, respectively, or by clicking on a section name in the left panel.

The data entry sections may present several different types of questions to capture the data that is required for submitting a particular form.

Review Section

If present, the **Review** section provides the user with the opportunity to review and inspect the information entered prior to submission. The user has the ability to print the form submission from this location by clicking the **Print Review** button, if a physical copy is desired for reviewing purposes. If the information provided is deemed accurate and complete, click **Certify & Submit/Signing** to move to the Certify & Submit/Signing section in the process.

At any time, the **Save Progress** button can be clicked to save the form submission in its current state and conclude data entry for the time being. The submission wizard can be reopened by clicking on the **History** link at the top of the form and selecting the **Edit** button next to the appropriate form submission.

Navigate between sections using the **Previous Section** and **Certify & Submit/Signing** buttons, at the top and bottom of the wizard, respectively, or by clicking on a section name in the left panel.

Application for Variance ⓘ
 Submission HNX-6GE6-8MX8T Revision 1 Form Version 7.4

New Application \$300.00

Last saved a few seconds ago
 SAVE PROGRESS

- Processing Info
- Contact
- Location
- Individual Authorized to Act for Applicant
- Identify Section of Chapter 11-62
- Specific Information
- Review**
- Certify & Submit

Review

This step allows you to review the form to confirm the form is populated completely and accurately, prior to certification and submission.

Please note: Any work you perform filling out a form will not be accessible by Windsor Solutions staff or the public until you actually submit the form in the 'Certify & Submit' step. At the time of submission, it will be transmitted to Windsor Solutions and it will become part of the public record, accessible per the Freedom of Information Act.

| CONTACT |
|---|
| Name of Owner Seeking a Variance Full Name Sally Way Title Owner |
| Mailing Address [No Street Address Specified] [No City Specified] [No State/Area Specified] [No Postal Code Specified] |
| Enter Brief Description of the Variance None Specified |

NEXT SECTION
 Certify & Submit


Print Review

Certify & Submit/Signing Section

Depending on the certification/signing requirements for the form, this section may be presented differently. The two primary presentations include: Certify & Submit or Signing. Certify & Submit includes a standard certification agreement prior to submission. Signing includes a more stringent electronic/digital signature feature. Examples of each are presented below.

Certify & Submit

In the **Certify & Submit** section, the user will acknowledge the certification statement and certify the submission by clicking the **Certify and Submit** button. If the form has a fee and payment is required, the user will proceed to the **Payment** section, otherwise the user will be navigated to the **Submission Confirmation** section.

 **The Finish Later - Save and Exit** button can be clicked to save the form submission in its current state and conclude data entry for the time being. The submission wizard can be reopened by clicking on the **History** link at the top of the form and selecting the **Edit** button next to the appropriate form submission.

Application for Variance ⓘ
 Submission HNX-6GE6-8MX8T Revision 1 Form Version 7.4

New Application \$300.00

Last saved a few seconds ago
 SAVE PROGRESS

- Processing Info
- Contact
- Location
- Individual Authorized to Act for Applicant
- Identify Section of Chapter 11-62
- Specific Information
- Review
- Certify & Submit**

PREVIOUS SECTION
 Review

Certify & Submit

This step allows you to certify the form as complete and accurate and to submit the form to Windsor Solutions for review and processing.

Please note: Any work you perform filling out a form will not be accessible by Windsor Solutions staff or the public until you actually submit the form in the 'Certify & Submit' step. At the time of submission, it will be transmitted to Windsor Solutions and it will become part of the public record, accessible per the Arkansas Freedom of Information Act.

I certify that I have knowledge of the facts herein set forth and that the same are true and correct to the best of my knowledge and belief.

FINALIZE SUBMISSION
 Submit Form

FINISH LATER
 Save and Exit

Signing


Default nForm Agency Users Guide

In the **Signing** section, the user may be offered the option of providing a digital signature (online) or hard copy signature (physical paper signature).


When **Hard Copy Signature** is selected, the user will be presented with the **Download Certification Form** button where the form can be downloaded, printed, reviewed, signed and returned to the agency.


When **Digital Signature** is selected, the user will be walked through the invitation and signing process. These steps will be followed as a part of this process:

- Click **Next** to navigate to the Choose Signers step.
- When a single signature is required, the user will select who will sign the submission (**Me** or **Someone else**).
 - When **Me** is selected, the user will be required to acknowledge several submission agreement statements and sign the submission by entering their account password, answering a security question and clicking the **Sign** button.

 The **Sign** button will not be disabled until all acknowledgements are acknowledged and the users password/challenge question is provided.


- When **Someone else** is selected, the user will be presented with the roles required for signature (if more than one). Click **Next** button if presented with required roles. The user will be provided with the ability to invite others to sign the submission. The user will provide the signor(s) email address and any special instructions. Upon clicking the **Send Invite** button, signing invitation(s) will be sent to the invitee(s). The invited signers will be required to click on the link on their invitation email (or open the submission and navigate to the signing area) to sign the submission. The invited signers will be presented. This signers user will be required to acknowledge several submission agreement statements and sign the submission by entering their account password, answering a security question and clicking the **Sign** button.

 The **Send Invite** button will not be disabled until signer email(s) are provided.

 Once signings have occurred, if the form is reopened for editing (e.g., user clicks on the **Continue Editing Draft** button), all current signings will be removed from the submission.

Submission Received/Completed Section


This **Submission Received/Completed** section confirms that the form submission was successfully submitted to the agency, displays the unique Submission # assigned to this submission for tracking purposes, any fees charged applied to the submission. In addition, this section provides a means of paying any applicable fees for the form submission, if applicable. The fees due will be displayed in the Fee Details section on the page and means for paying the fees will be presented.

 If the form does not require a fee, this **Submission Received** section will be skipped and the user will be navigated to the **Submission Complete** section.

Pay Online: If the form accepts online payments, a button labeled **Pay Online** will be available and this will allow you to make an online payment through the online payment service.

Pay by Mail: If payments by check are accepted, click the **Pay by Mail** button and a printable form for making such a payment will be displayed. If not prepared to make a payment at this time, click the **No thanks, I'll pay later** option to continue. Please note that your submission will not begin processing until payment in full is received and cleared.

No thanks, I'll pay later: If you are not prepared to make a payment at this time, click the **No thanks, I'll pay later** option to continue. Please note that your submission will not begin processing until payment in full is received and cleared.

 At this point in the process, the form is considered submitted and is visible within the agency. The form submission will **not** be reviewed and processed until payment is received for the form submission.

Submission Received

Application for Variance AWAITING PAYMENT

01/31/2020 Submission HNX-6GE6-8MX8T Revision 1 Form Version 7.4

Your submission was successfully submitted. It is recommended that you print and retain a copy of your submission receipt for this transaction using the [Print Confirmation](#) feature.

Payment Required to Complete Submission

Please send the remittance to either address.

Submission Fees

| | |
|---------------------------|----------|
| New Application | \$300.00 |
| Total Due \$300.00 | |

Pay Online

Pay by Mail

No thanks, I'll pay later.

5.2 View Users with Access to Submission

Users can be given access to enter data in the submission. Users can be provided with access to enter data on the submission and elevated user rights can be provided to add/remove users who have access to the submission.

This topic describes how to view the users who have access to work on the submission (excluding the current user) and their level of access.

Steps:

To view users with access to work on the submission (excluding the current user), perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down the page to the Access area, in the right panel.
3. A list of the users with access to the submission (excluding the current user) is displayed.

| Access | |
|-------------|------------------------|
| Name | Access Level |
| Kevin Lyons | Submission Editor |
| Tom Brown | Submission Contributor |


5.3 Sharing a Submission

Submissions can be shared with other users to support collaborative data entry and review. This topic describes how to share a submission with another user.

Sharing Submission from Submission Wizard

When completing a form submission the user will have the ability to share the submission with another person so they can enter data, review data or invite other users to work on the submission. The following process describes how to share a submission with another user from the Submission Wizard.

To share access to the submission with other users from the Submission Wizard, follow these steps:

1. Open the draft submission in edit mode in the Submission Wizard using the steps described in the **Edit Draft Submission (Section 6.4)** topic, if not already open.
2. Select the **Options** icon ().

Manage Shared Access

Delete Draft

3. Select the **Manage Shared Access** button () to open the Manage Access to the Submission page.


Enter the email address for the user you would like to authorize:

Adding a user will allow them to access, modify and view this submission. The user must be registered with the system to be eligible.

Can Manage Access to Submission?

Users with Access to this Submission

| ↓↑ User Name | ↓↑ Affiliation | ↓↑ Can Manage Access to Submission? | ↓↑ Is Submission Owner? | Actions |
|---------------|----------------|-------------------------------------|-------------------------------------|---------|
| Internal User | Windsor | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |

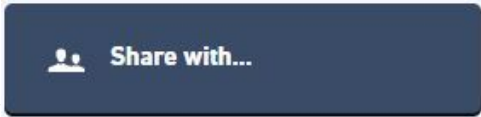
4. To share the submission, type in the email address of the user whom will receive access. Indicate if the user will be allowed to add or remove other users from the submission by selecting the **Can Manage Access to Submission?** checkbox. Select the **Add** button to add the user to the submission.
5. The system will then verify that the user exists in the system and will prompt you to confirm the selection.
6. Click the **Confirm** button to approve the user, after approval, the user will display in the list of authorized users in the grid below. After adding the user, they will be sent an email with instructions on how to access the submission.
7. Click the **Done** () button to return to the submission.

Sharing Submission from Submission Overview

When completing a form submission the user will have the ability to share the submission with another person so they can enter data, review data or invite other users to work on the submission. The following process describes how to share a submission with another user from the Submission Overview area.

To share access to the submission with other users from the Submission Overview area, follow these steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.



2. Click the **Share With** button () in the Access area down the page in the right panel to open the Manage Access to the Submission page.

Enter the email address for the user you would like to authorize:

Adding a user will allow them to access, modify and view this submission. The user must be registered with the system to be eligible.

Can Manage Access to Submission?

Users with Access to this Submission

| User Name | Affiliation | Can Manage Access to Submission? | Is Submission Owner? | Actions |
|---------------|-------------|-------------------------------------|-------------------------------------|---------|
| Internal User | Windsor | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |

3. To share the submission, type in the email address of the user whom will receive access. Indicate if the user will be allowed to add or remove other users from the submission by selecting the **Can Manage Access to Submission?** checkbox. Select the **Add** button to add the user to the submission.
4. The system will then verify that the user exists in the system and will prompt you to confirm the selection.
5. Click the **Confirm** button to approve the user, after approval, the user will display in the list of authorized users in the grid below. After adding the user, they will be sent an email with instructions on how to access the submission.
6. Click the **Done** () button to return to the submission.

5.4 Identify Users Editing Submission Section

Users have the ability to view other users who are viewing/editing the section the current user is working within.

This topic describes how the user can view the other users who are viewing/editing the same section of a form.

This feature is only available when multiple users are editing the same form submission section. When multiple users are editing the same section, an alert notification icon will display with the **Options** icon () in the upper left hand corner of the Submission Wizard.


Steps

1. Open the draft submission in edit mode in the Submission Wizard using the steps described in the **Edit Draft Submission (Section 6.4)** topic, if not already open.
2. If the submission is currently being edited by another user, an alert notification icon will

display with the **Options** icon () at the top left of the page.

3. To Identify the other user, select the **Options** icon (). A window will open with text identifying the other user.

There are 1 other users currently editing this submission:

 Internal User

Manage Shared Access

Delete Draft

6 Manage Your Submission


Once a form is submitted, authorized users will have the ability to view and manage the submission.

A historical list of all form submissions that were created and/or submitted is provided on the History area of the portal. From this area a submitter can view the status of any submission; populate, submit and/or delete draft submissions; and revise and/or view previously submitted forms. The list of the users submissions can also be printed, if needed.

This section describes the primary options for managing a submission. The primary topics in this area include:

- **Open Submission**
 - **View Submissions (Section 6.1):** The details of how to view the list the submitters submissions.
 - **Viewing a Submission (Section 6.3):** The details of how to view the information included in a submission as well as to review the current processing status (following certification and submission).
 - **Change Name of Submission (Section 6.2):** The details of how to customize the name of the submitters submission(s).
 - **Viewing a Submission (Section 6.3):** The details of how to view the information included in a submission as well as to review the current processing status (following certification and submission).
 - **Edit a Draft Submission (Section 6.4):** The details of how to edit a draft submission and complete the submission process.
- **Review and Manage Your Submission:** There are many options form managing a submission which are available from the Submission Overview area. Below is a description of the primary options available for a form submission.
 - **View Submission Summary (on-line documentation):** The detail of how to open and view the Submission Summary.
 - **Edit a Draft Submission (Section 6.4):** The details of how to edit a draft submission and complete the submission process.
 - **Revise Submitted Form (Section 6.6):** The details of how to revise and resubmit a form for review.
 - **View and Address Correction Requests (Section 6.7):** Correcting issues noted by the processor of the form.
 - **View Submission Form Questions & Responses (Section 6.8):** The detail of how to open and review the Submission Form Questions & Responses.
 - **View and Compare Submission Revisions (Section 6.9):** The details of how to view different versions of a submission and how to compare two versions of a submission highlighting differences.
 - **View the Processing Workflow (Section 6.10):** The details of how to view the key steps in the processing workflow for the submission.
 - **Print a Submission (Section 6.11):** The details of how to print the submission.
 - **Download a Submission (Section 6.12):** The details of how to download a copy of the submission and any related attachments.
 - **View Attachments (Section 6.13):** The details of how to view the attachments associated with the form submission.
 - **View Active Processing Steps (Section 6.14):** The details of how to view the processing steps that are currently active for the submission.
 - **View Submission Status History (Section 6.15):** The details of how to view the history of processing status assignments for the submission.
 - **Submission Confirmation (Section 6.16): The details of how to navigate to the confirmation of submission**
 - **View Submission Financials (Section 6.17):** The details of any fees assessed, payment(s) made and any outstanding balance.
 - **Make Payment (Section 6.18):** The details of how to make a payment, if an outstanding balance exists.
 - **Download Payment Voucher (Section 6.19):** The details of how to download a Payment Voucher used for the remittance of payment.
 - **View Contact Info (Section 6.20):** The details of how to view contact information for the form submission.

- **View Users with Access to Submission (Section 5.2):** The details of how to view users with access to the submission.
- **Share Submission (Section 5.3):** The details of how to share access to the submission with other users.
- **Delete Draft Submission (Section 6.23):** The details of how to delete a draft submission.

 Please note that a submission **must be officially certified, submitted and in some cases paid for** by the submitter for it to be available for review by the agency. The agency will **not** have visibility or access to draft submissions that are not yet submitted.

6.1 View Submission History

The submission History page allows a user to view, resume (*edit if not submitted*) or delete (*if not submitted*) their form submissions.

This topic describes the capabilities of the History page.

Steps

To open the submission history list, perform the following steps:








1. Sign into the system.
2. Select the **History** link from the top menu.




3. A list of all your form submissions will be displayed.

History

Total records: 181 Filtered total: 5 Page total: 5 Filter: 2020


| Submission # | Alternate Identifier | Created | Submitted | Submission Name | Status | Locked | Actions |
|----------------|----------------------|---------------------|---------------------|--------------------------|-----------------|--------|---|
| HNX-3H6C-XM10Z | | 01/27/2020 04:32 PM | | Application for Variance | Draft | No |   |
| HNP-QSYX-5FC52 | | 01/28/2020 09:16 AM | 01/28/2020 09:17 AM | Application for Variance | Submitted (Due) | No |  |
| HNP-NGFR-QQ25X | | 01/29/2020 10:11 AM | 01/30/2020 01:20 PM | Application for Variance | Submitted (Due) | No |  |
| HNX-6GBB-DRG89 | | 01/31/2020 11:21 AM | | Application for Variance | Draft | No |   |
| HNX-6GE6-8MX8T | | 01/31/2020 11:27 AM | 01/31/2020 11:35 AM | Application for Variance | Submitted (Due) | No |  |

1/1 10 per page

 Print

6.2 Change Name of Submission

A custom submission name can be specified by the submitter, as desired for reference purposes. This can be helpful to distinguish submission when the submitter submits the same form for multiple sites/companies, etc.

 This custom submission name provided from the submitter is not used by the internal agency staff.

This topic describes how to assign a custom name to a submission.

Steps

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.

- Click on the Submission Alias value in the Submission Information section of the Summary section of the Submission Overview page to enter the field in to an edit state.

| | |
|-------------------|--|
| SUBMISSION ALIAS | Application for Variance |
| SUBMITTED | 01/31/2020 (0 days ago) by External User |
| SUBMISSION ID | HNX-6GE6-8MX8T |
| SUBMISSION REASON | New |





- Enter the new name and click out of the Submission Alias field

Variations

- Open the History form using the steps described in the **View Submission History (Section 6.1)** topic.
- Click on the **Submission Name** value for the submission in question. This will make the **Submission Name** value into an editable field. Type the desired submission name and click out of this editable field.

History

Total records: 180 Filtered total: 180 Page total: 10

| Submission # | Alternate Identifier | Created | Submitted | Submission Name | Status | Locked | Actions |
|----------------|----------------------|---------------------|---------------------|--------------------|-----------|--------|---|
| HNP-FV51-VY8QA | | 05/03/2019 08:22 AM | 05/03/2019 08:23 AM | GMR Monthly Report | Submitted | No |  |
| HNP-FY5K-VPV9B | | 05/03/2019 11:01 AM | | Wastewater Permit | Draft | No |    |

- The new submission name will be saved.

6.3 Viewing a Submission

The details of a particular form submission that is associated to the submitter can be opened and viewed from the Submission History list page.


This topic describes how the submitter can view a submission.

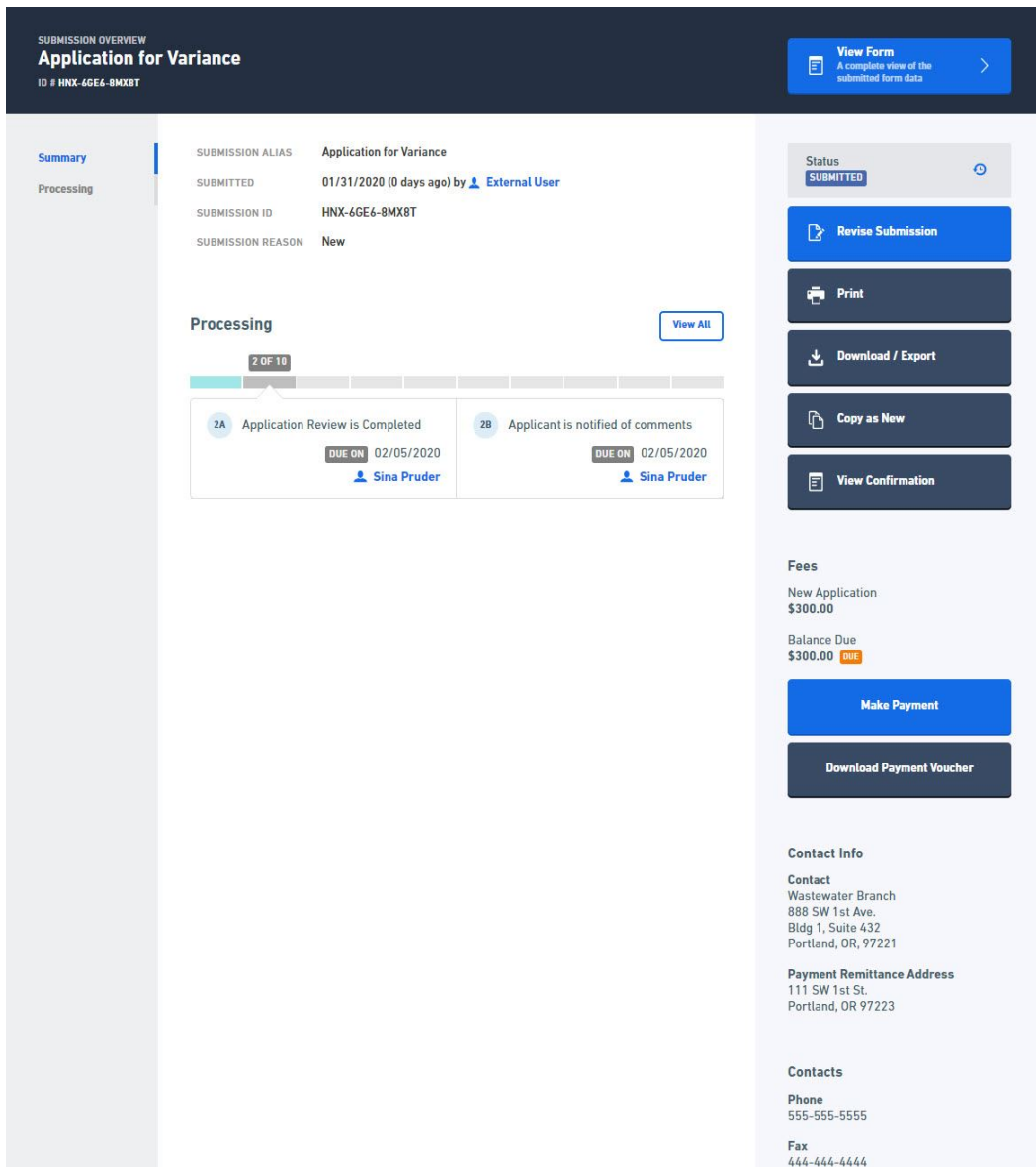
Steps

The submitter can open and view a submission using the following steps:

- Open the History form using the steps described in the **View Submission History (Section 6.1)** topic.



- Select the **View** icon View () to the right of the submission.
- The Submission Overview area will be presented to the user.



6.4 Edit a Draft Submission

When a submitter does not complete the form submission process (i.e., the form submission is assigned a Draft status), editing can continue on the form submission, at a future date.

This topic describes the steps required to reopen and continue editing a draft form submission.


Only submissions with a status of "Draft" are eligible to be edited. To make changes to a submission after it has been submitted, a revision must be established and resubmitted. See the **Revise Submitted Form (Section 6.6)** topic for further details.

In some instances, if the agency makes adjustments to the form used for a submission, the agency may choose to automatically upgrade the form used for a submission to the latest form definition. In this scenario, when the submitter opens their form submission, they will be notified that the form will be promoted to the latest version and the form may include some adjustments to the layout and questions asked on the form.

Edit Draft Submission from Submission Overview

A submitter can continue editing a form submission from the Submission Overview area using

the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Click the **Continue Editing Submission** button () in the top right.
3. The system will open the form submission in the Submission Wizard allowing the submitter to resume the form submission process. See **Submit a Form (Section 5.1)** for additional details on editing/submitting a form.

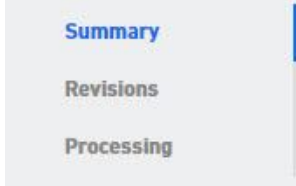
6.5 View Submission Summary

This topic describes how to open the summary information for the submission. This area was designed to streamline the process of reviewing a submission. The review process begins after the first submission of a form.

Steps

To open the Submission View page from the Processing Dashboard, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Click on the **Summary** link on the left navigation panel.



3. The Summary view will be displayed, displaying the summary information for the submission.

Default nForm Agency Users Guide

View Form
A complete view of the submitted form data

SUBMISSION OVERVIEW

Application for Variance

ID # HNP-NGFR-0025X REVISION 4

| | |
|-------------------------------|---|
| SUBMISSION ALIAS | Application for Variance |
| SUBMITTED | 02/04/2020 (0 days ago) by External User |
| REFERENCE # | — |
| SUBMISSION ID | HNP-NGFR-0025X |
| DESCRIPTION | Acme's Application for Variance |
| SUBMISSION REASON | New |
| PROJECT TYPE(S) | — |
| PROJECT TYPE(S) JUSTIFICATION | — |
| RESPONSIBLE PERSON | — |

Notes & Issues Add New

ALL (6)
CORRECTION REQUEST (2)
NOTE (2)
PROCESSING ISSUE (2)

CONTACT - MAILING ADDRESS

? **Correct City/ZIP Code** — The ZIP code does not match the city. Please correct. ! ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:45 PM

! **Review Client Financial Standing** ! ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:13 PM INTERNAL-ONLY

CONTACT - NAME OF OWNER SEEKING A VARIANCE

? **Correct Owner** — Public records indicate that the owner is currently Sally Way, Ple... ! ACTION REQUIRED

Added by Kevin Lyons 2019-05-10 1:32 PM

SHOW MORE

Processing View All Manage

2 OF 10
8 OF 10

2A **Application Review is Completed** ...

DUED ON 02/09/2020

Sina Pruder

2B **Applicant is notified of comments** ...

DUED ON 02/09/2020

Sina Pruder

Documents & Attachments Add New

ALL (3)
ADDED BY PROCESSOR (1)
SUBMISSION ATTACHMENTS (2)

Construction Permit.pdf

Attached to Submission by External User 2020-02-04 11:58 AM SUBMISSION ATTACHMENT VISIBLE TO APPLICANT

Section: Specific Information Control: H: Upload All Attachment(s) Here

Variance Plan.pdf

Attached to Submission by External User 2020-02-04 11:58 AM SUBMISSION ATTACHMENT VISIBLE TO APPLICANT

Section: Identify Section of Chapter 11-62

Public Notice Plan.pdf

Attached to Submission by Kevin Lyons 2019-05-15 12:17 PM ADDED BY PROCESSOR

Internal Data

| | |
|---------------------|-----------|
| PROCESSING DUE DATE | 5/30/2019 |
| PUBLIC MEETING DATE | 5/23/2019 |

Status 🔧 ⌛

SUBMITTED

Begin Review

During review the applicant will be locked out of the form.

Print

Download / Export

View Confirmation

Fees ✎

New Application \$300.00

Balance Due \$300.00 DUE

Download Payment Voucher

Contact Info

Contact
Wastewater Branch
888 SW 1st Ave.
Bldg 1, Suite 432
Portland, OR, 97221

Payment Remittance Address
111 SW 1st St.
Portland, OR 97223

Contacts

Phone
555-555-5555

Fax
444-444-4444

Access

| Name | Access Level |
|--------------|-------------------------|
| Staff User | Submission Editor |
| Thomas Brown | Submission Share Editor |

Event Log

Submission Unlocked - Submission Unlocked
Change Audit - Created
Internal User 2020-02-04 1:53 PM

Submission Locked - Submission Locked
Change Audit - Created
Internal User 2020-02-04 12:00 PM

Submission Unlocked - Submission Unlocked
Change Audit - Created
Internal User 2020-02-04 11:48 AM

Show 15 More Events

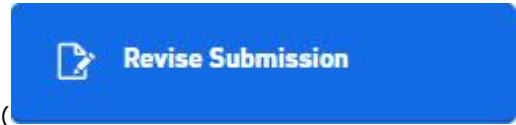
6.6 Revise Submitted Form

Once a form has been submitted, it can no longer be edited. To make changes, the form submission must be revised, then edited, and re-submitted.


This topic describes the process of revising a submission.

Steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.




2. Click the **Revise Submission** button ().

 Please note that the Revise button may be presented with an orange color if correction requests exist. Additionally, if a user attempts to correct a correction request prior to starting a revision, the system will direct the user to begin a revision.

3. The system will present a prompt to confirm the intent to revise and edit the submission.
4. Confirm the revision at the prompt. The system will create a revision and redirect to the Submission Wizard, in edit mode.
5. At this point in the process, the user will be able to follow the same steps used in the **Submit a Form (Section 5.1)** topic.

6.7 View and Address Correction Request

Correction requests are requests for the submitter to correct or address a concern or issue with the submission. Submitters cannot submit a revision without addressing and marking all correction requests as complete, to ensure all correction requests are addressed prior to continued processing.

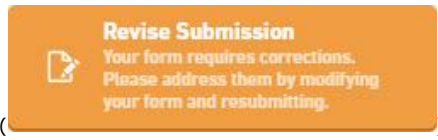
 All correction requests must be addressed and marked complete. Once all are marked complete, the user will need to re-submit the form to complete the process.

This topic discusses how an submitter will "process" a correction request.


Address Correction Request from Submission Summary

To address a correction request from the Submission Overview page, follow these steps:

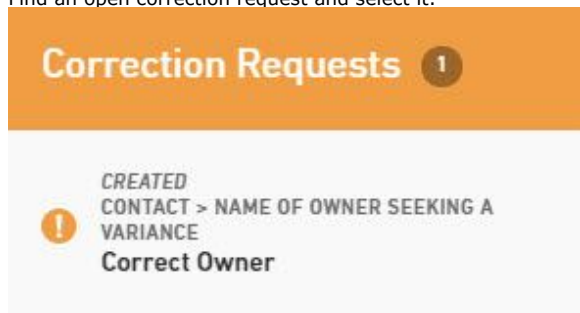
1. Open the Submission Overview form using the steps described in the **Viewing a Submission (Section 6.3)** topic, if not already open.



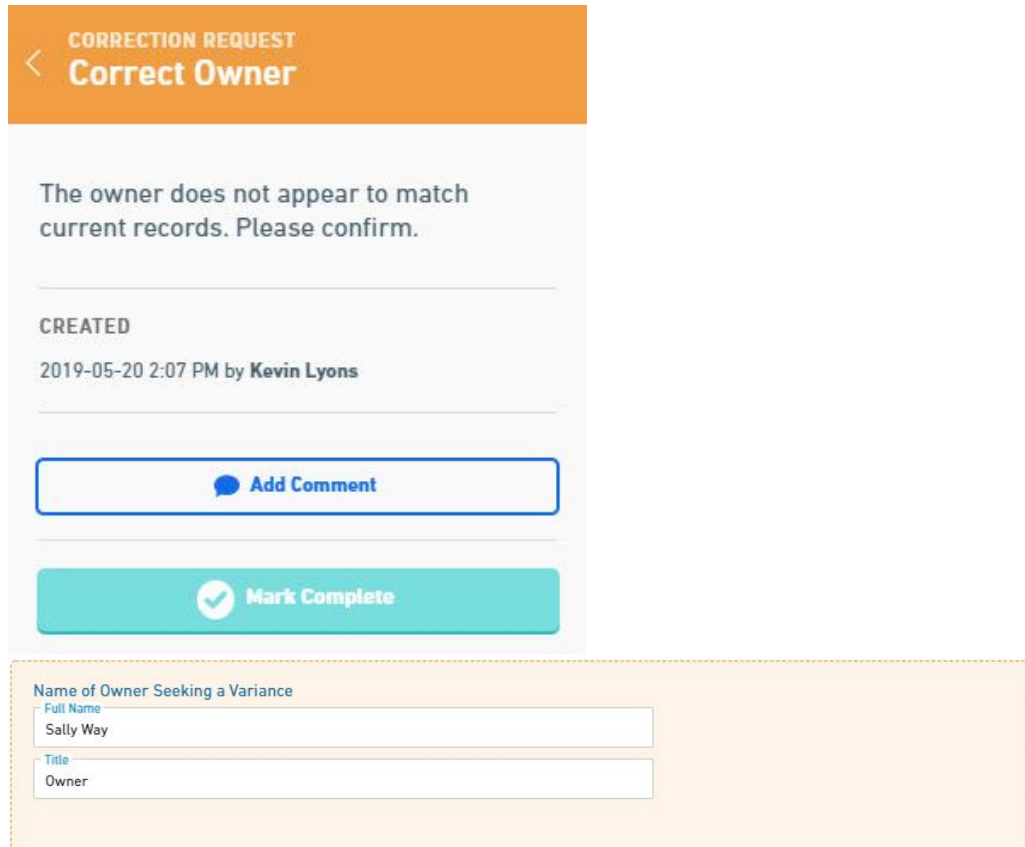
2. Select the **Revise Submission** button () from the header to establish a submission revision for editing.

 Please note that the Revise button may be presented with an orange color if correction requests exist. Additionally, if a user attempts to correct a correction request prior to starting a revision, the system will direct the user to begin a revision.


3. Confirm the request to start a revision, when prompted.
4. The system will establish a new revision and the user will be navigated to the Submission Wizard for the current submission revision.
5. Find an open correction request and select it.



6. The details of the correction request will be presented. The specific section or control for which the correction request relates will be highlighted, if documented at that level.
7. Review the request and make the corresponding correction.



8. Select the **Add Comment** button to enter a comment for the processor. Select **OK** to save the comment.
9. Select the **Mark as Complete** button.

 All correction requests must be addressed and marked complete. Once all are marked complete, the user will need to re-submit the form to complete the process.


Address Correction Request from Form Questions and Responses

To process (i.e., approve or re-open) a correction request from the Form Questions and Responses area, follow these steps:

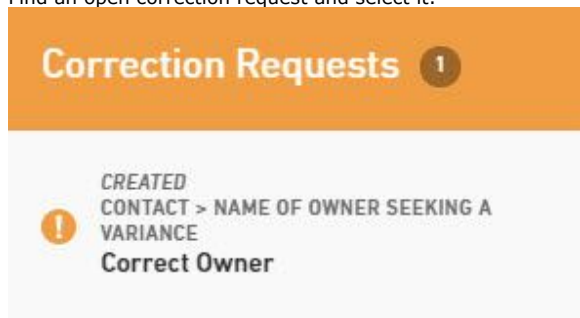
1. Open the Form Questions and Responses form using the steps described in the **View Form Questions and Response (Section 7.7)** topic, if not already open.



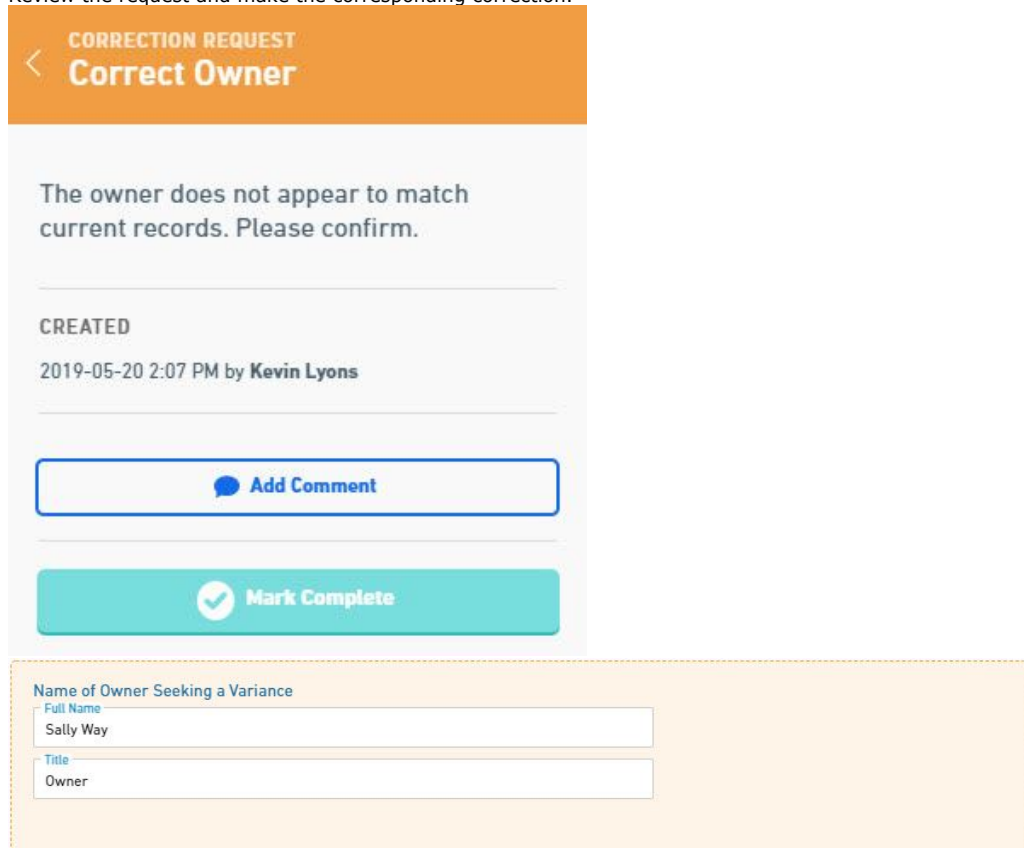
2. Select the **Revise Submission** button () from the header to establish a submission revision for editing.

 Please note that the Revise button may be presented with an orange color if correction requests exist. Additionally, if a user attempts to correct a correction request prior to starting a revision, the system will direct the user to begin a revision.

3. Confirm the request to start a revision, when prompted.
4. The system will establish a new revision and the user will be navigated to the Submission Wizard for the current submission revision.
5. Find an open correction request and select it.



6. The details of the correction request will be presented. The specific section or control for which the correction request relates will be highlighted, if documented at that level.
7. Review the request and make the corresponding correction.



CORRECTION REQUEST
Correct Owner

The owner does not appear to match current records. Please confirm.

CREATED
2019-05-20 2:07 PM by Kevin Lyons

Add Comment

Mark Complete

Name of Owner Seeking a Variance

Full Name
Sally Way

Title
Owner

8. Select the **Add Comment** button to enter a comment for the processor. Select **OK** to save the comment.
9. Select the **Mark as Complete** button.

 All correction requests must be addressed and marked completed. Once all are marked complete, the user will need to re-submit the form to complete the process.

6.8 View Form Questions and Responses


This topic describes how to open the submitter provided questions and responses.

Steps

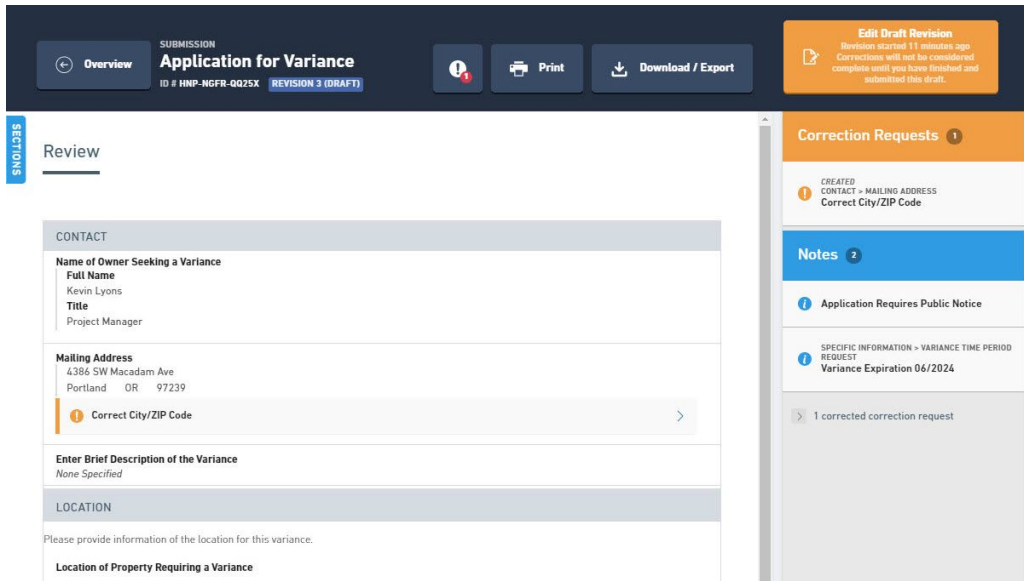
To open the Submission Form Questions & Responses (i.e., Form) page, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Click on the **View Form** button on the left navigation panel.



 Please note that the View Form button may be presented with an orange color if correction requests exist.

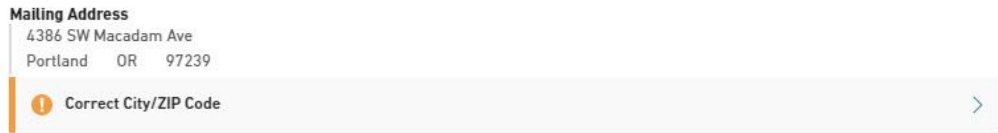
3. The Form will be displayed, displaying the Questions & Responses for the submission.



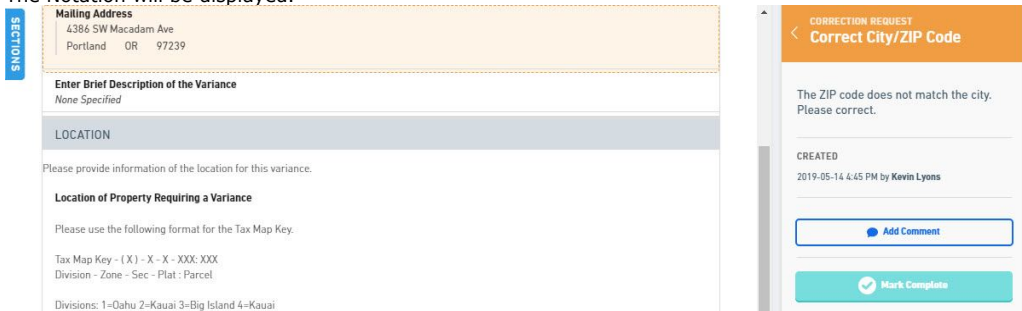
Variations

Navigate to a Section/Control level Notation:

1. Click on the Go To (>) to the right of the Correction Request, Note or Processing Issue in the Notes and Issues list or within a Form.

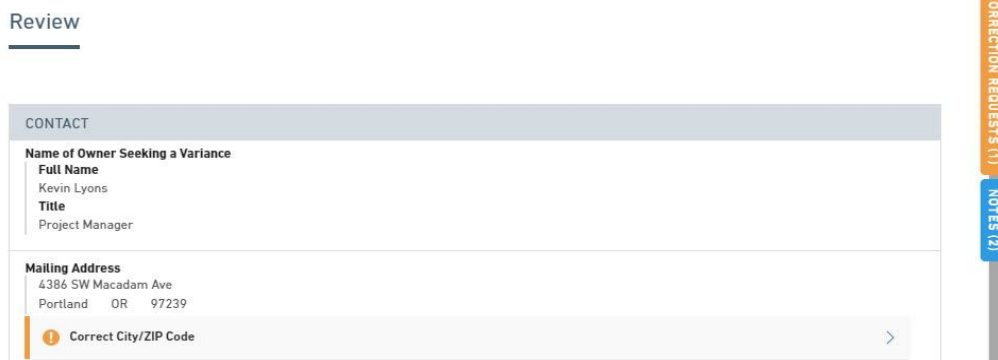


2. The Notation will be displayed.

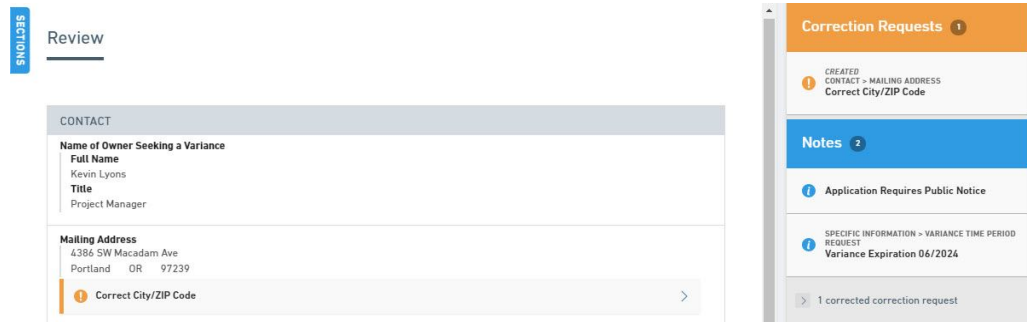


Activate Notation Panel:

1. Click **Correction Requests, Notes or Processing Issues** in the tabs to the right of the page.



2. The Notification Panel will be displayed.



6.9 View And Compare Revisions

Each refined version of the form that is submitted to the agency is contained and packaged as a submission "revision". This approach allows all changes to be reviewed, certified and formally submitted by the submitter in addition to allowing all changes to be tracked over time. Prior versions of the submission can be reviewed, when needed, and versions can be compared, side-by-side.

This topic describes how to find and view prior version of a submission and how to compare two different version of a submission.

View Another Revision of the Submission

To view and open another revision for the submission, follow these steps:

Steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Click on the **Revisions** link on the left navigation panel.



The Revisions list is only displayed if revisions exist.

3. The list of revisions will appear.

| Revisions | | Compare |
|----------------------|------------|-------------------------|
| Revision 2 (viewing) | 05/14/2019 | |
| Revision 1 | 05/10/2019 | VIEW |

4. Select the view button ([VIEW](#)) to open another revision.
5. The Submission Summary page will be presented for the selected version of the submission.

Many features will be disabled for prior revisions of a submission.

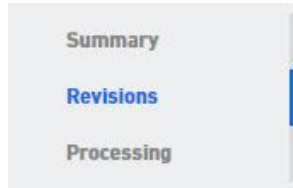
Compare Submission to Previous Version

This section of the system allows you to view the differences between two versions of the submission. The submission version can be seen in the Submission Version Panel in the bottom left corner of the screen. If two or more versions exist you can use the compare feature to determine what has been added, changed or removed.

To compare the differences between two revisions for a submission, follow these steps:

Steps

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Click on the **Revisions** link on the left navigation panel.



The Revisions list is only displayed if revisions exist.

3. The list of revisions will appear.

| Revisions | | Compare |
|----------------------|------------|-------------------------|
| Revision 2 (viewing) | 05/14/2019 | |
| Revision 1 | 05/10/2019 | VIEW |

4. Click the **Compare** button () at the top of the revision list.

5. Select the two versions you wish to compare in the Version A and Version B drop-down lists.

| | |
|--|---|
| <p>Version A View</p> <p>Submission (v1 - REVISED) ▼</p> | <p>Version B View</p> <p>Submission (v2 - INREVIEW) ▼</p> |
|--|---|

5. The differences between the two versions will be displayed in the Difference between A and B panel. Information that was added will be highlighted in yellow and underlined. Information that was removed will have strikethrough over removed text.

Contact

Name of Owner Seeking a Variance

| | |
|-------|--|
| Name | Kevin <u>Jimi Lyons</u> <u>Hendrix</u> |
| Title | Project Manager <u>Owner</u> |

6.10 View Processing Workflow

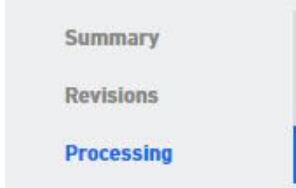
Submitters have the ability to view the key steps in the processing workflow for the submission. This includes the steps in the process and their dependencies to one another.

This topic describes how to open the workflow processing steps area of the submission for viewing.

Steps

To open the submission processing workflow page, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Click on the **Processing** link on the left navigation panel.



3. The processing steps for the submission will be displayed.

| | | |
|------------|---|---|
| Summary | Processing | |
| Revisions | | |
| Processing | | |
| 1 | Application Submitted COMPLETED 01/28/2020 Demo User | |
| 2 | 2A Application Review is Completed DUE ON 02/02/2020 Sina Pruder | 2B Applicant is notified of comments DUE ON 02/02/2020 Sina Pruder |
| 3 | 3 Draft Public Notice for Variance Sina Pruder | |
| 4 | 4 Mail Public Notice to Applicant Sina Pruder | |
| 5 | 5A Solicit Comments to other Agencies Sina Pruder | 5B Verify Receipt of Public Notice Affidavit Sina Pruder |
| 6 | 6 Confirm receipt of all comments from other Agencies Sina Pruder | |
| 7 | 7 Draft Variance Decision Sina Pruder | |
| 8 | 8 Mail Draft Decision to Applicant Sina Pruder | |
| 9 | 9 Draft Final Variance Decision Sina Pruder | |
| 10 | 10 Issue Final Variance Decision to Applicant Sina Pruder | |

6.11 Print Submission

Users have the ability to print a submission on paper. When printing the submission, the user will have the ability to select the contents (e.g., correction requests, notes, history, etc.) that will be included in the submission.

This topic describes how to print the submission.

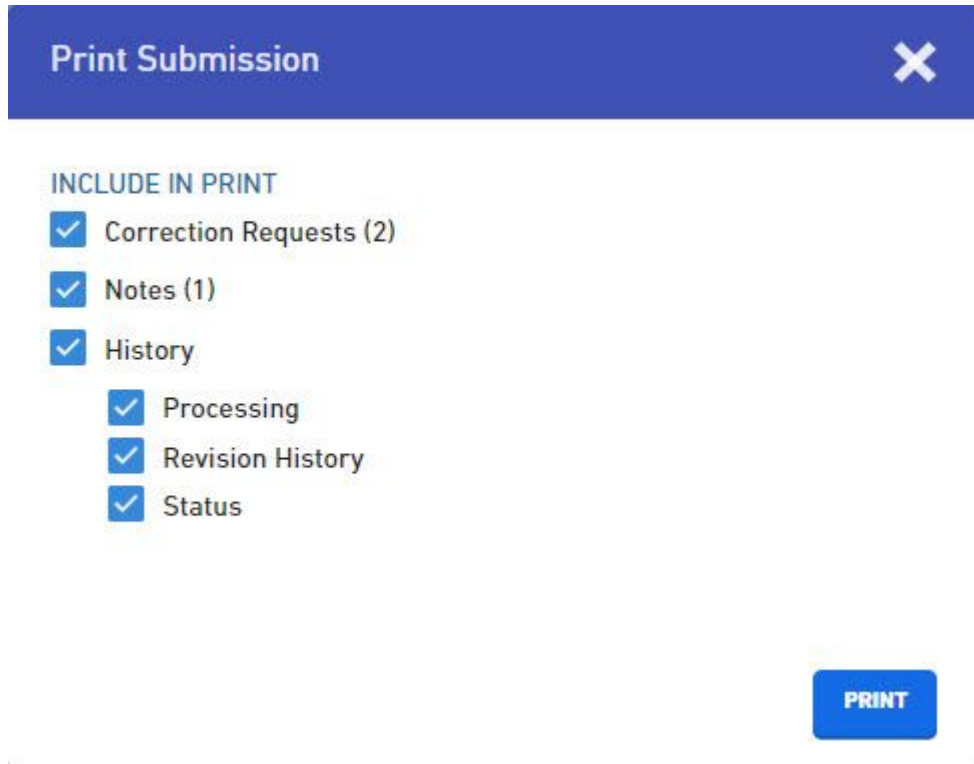
Steps

To print the submission, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Select the **Print** button.



3. The Print Submission dialog will be presented. Select the content to be included in the print output and click the **Print** button.




4. The browser's native print dialog will be activated, allowing the user to establish the print settings and send the job to the printer.

6.12 Download Submission

Users have the ability to download a submission and its related artifacts. Users have the ability to download the submission contents, as they currently exist, or the Copy of Record which includes the contents in the state they exist when submitted by the submitter. The Copy of Record is a legal document representing the original submission. When downloading the submission, the user will have the ability to select the content that will be included in the downloaded package, including a PDF version of the submission as well as any non-confidential attachments.

This topic describes how to download the submission and copy of record.

 By default, the submission will be provided in a PDF file format, but if attachments were included with the submission, the file will be provided as a compressed ZIP file including the PDF version of the submission and all provided attachments.

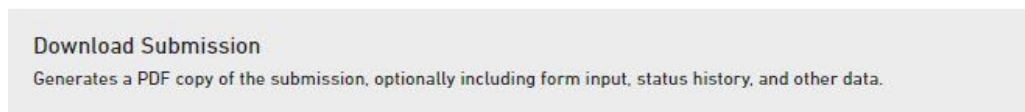
Download Submission

To download the submission and its associated artifacts, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Select the **Download** button.



3. Select the **Download Submission** option.



Download Copy of Record

Your submission's "receipt"—containing a full copy of your submission data, signed and dated with an SSL watermark.

- The Download Submission dialog will be presented. Select the content to be included in the download output and click the **Generate PDF** button.

- The browser's native download dialog will appear and prompt the user to download the submission PDF and any available attachments (as a ZIP file).

Download Copy of Record

To download the submission copy of record (as it was originally submitted), perform the following steps:

- Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
- Select the **Download** button.



- Select the **Download Copy of Record** option.

- The browser's native download dialog will appear and prompt the user to download the submission PDF and any available attachments (as a ZIP file). A digital signature stamp will show in the upper right-hand corner of the document as a part of the digital signature for the document.



6.13 View Attachments

Documents & Attachments are files that can be associated to a submission, either by the submitter or an internal processor during processing.

Attachments can be marked as confidential and, if marked as such, will only be viewable by the submitter and internal users with the appropriate authorization.

This topic describes how to view submission attachments.

View All Submission Attachments

To view all attachments provided by the submitter and internal staff for the submission, perform the following steps from the submission summary page:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down to the **Documents & Attachments** area in the center panel.
3. Associated documents will be displayed.

Documents & Attachments

A screenshot of the "Documents & Attachments" interface. At the top, there are four tabs: "ALL (3)", "SYSTEM-GENERATED (0)", "ADDED BY PROCESSOR (1)", and "SUBMISSION ATTACHMENTS (2)". Below the tabs, three document entries are listed. Each entry includes the document name, the user who attached it, the date and time, and a status label. The first entry is "Public Meeting Instructions.pdf" attached by "Kevin Lyons" on "2019-05-13 11:29 AM" with a status of "ADDED BY PROCESSOR". The second entry is "Construction Permit.pdf" attached by "External User" on "2019-05-13 11:23 AM" with a status of "SUBMISSION ATTACHMENT". Below this entry, it says "Section: Specific Information Control: H. Upload All Attachment(s) Here". The third entry is "Variance Plan.pdf" attached by "External User" on "2019-05-13 11:23 AM" with a status of "SUBMISSION ATTACHMENT". Below this entry, it says "Section: Identify Section of Chapter 11-62".

4. Select the All, System Generated, Added by Processor or Submission Attachments, to filter the list of the documents in different ways.

View Form Question and Response Attachments

To view attachments provided by the submitter on the form questions and responses page and in the context of the form question, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. **View the Form Questions & Responses (Section 6.8).**
3. Review the form and identify an attachment in question within the form.

A screenshot of a form question area. The question is "H. Upload All Attachment(s) Here". Below the question, there is a list of attachments. The first attachment is "Construction Permit.pdf". Below the attachment name, there are four options: "Confidential", "No", "Comment", and "None Specified".

4. Click on the document name to download and review the document.

View Notation Attachments

To view attachments associated to notations (e.g., correction requests or notes), perform the following steps:

1. Open a notation (i.e., **correction request (Section 6.7)** or note), if not already open.
2. If an attachment is associated, it will be displayed in the details of the notation on the right.
3. Click on the document name to download and review the document.

6.14 View Active Processing Steps

Processing steps allow the agency to view and manage the key tasks/steps that are completed while processing a submission. Each key task is represented as a processing steps. Processing steps can occur in sequence or in parallel of another tasks.

The active (next available) processing steps are display to the processor on the Submission Summary page. These active steps are a part of a **larger workflow (Section 6.10)** that is available for the submission. This topic describes how to navigate to and view the active processing steps.

Steps

To view the active processing steps for the submission, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down the page to the Processing section in the center panel.



3. The submission's active processing steps will be displayed.


6.15 View Submission Status History

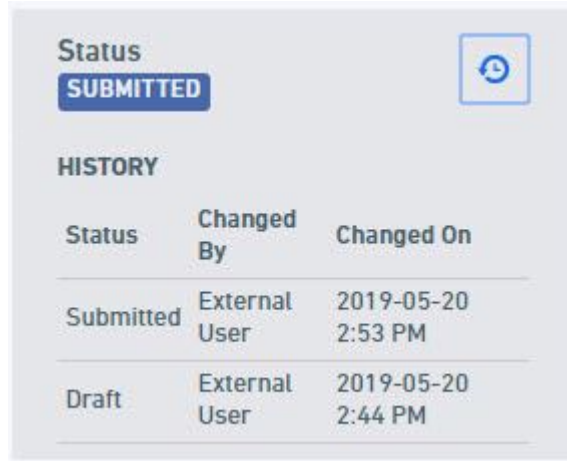
Submission follow a processing lifecycle. The current state of a submission in that lifecycle is tracked via a submission status. For each status change a submission receives, a history record is logged. Status history is used for tracking the lifecycle over time. The status history reflects who, when and what status is assigned to the submission.

This topic discusses how to view the status history log.

Steps:

To open the Submission View Status History, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Select the **Status History** button () in the status area.
3. The status history will be displayed.



The screenshot shows a submission status card. At the top, the word "Status" is followed by a blue button labeled "SUBMITTED". To the right of the button is a blue square icon containing a white circular arrow. Below this is a section titled "HISTORY" which contains a table with three columns: "Status", "Changed By", and "Changed On".

| Status | Changed By | Changed On |
|-----------|---------------|--------------------|
| Submitted | External User | 2019-05-20 2:53 PM |
| Draft | External User | 2019-05-20 2:44 PM |

6.16 Submission Confirmation

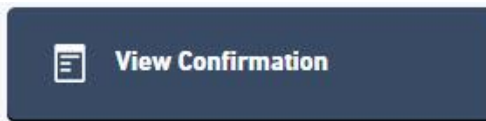
Submitters can open the Submission Confirmation (and Payment) page for the submission to review the confirmation the submitter can see, and the payment balance, if applicable.


This topic describes how to open the confirmation page.

Steps:

To open the Submission Confirmation page, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Select the **View Confirmation** button.



 Selecting the Make Payment button will also open the Submission Confirmation (and Payment) page.

3. The submission confirmation will be presented to the user.

Submission Received

Application for Variance AWAITING PAYMENT

01/31/2020 Submission HNX-6GE6-8MX8T Revision 1 Form Version 7.4

Your submission was successfully submitted. It is recommended that you print and retain a copy of your submission receipt for this transaction using the [Print Confirmation](#) feature.

Payment Required to Complete Submission

Please send the remittance to either address.

Submission Fees

| | |
|---------------------------|----------|
| New Application | \$300.00 |
| Total Due \$300.00 | |

Pay Online

Pay by Mail

[No thanks, I'll pay later.](#)

4. To return the calling page, click the **No thanks, I'll pay later** link and then the **View Submission** button.

6.17 View Submission Financials

Users have the ability to view the fees assessed, payments received, adjustments applied, fees due and payment status.

This topic discusses how to view the submission financial information.

Steps:

To view fees, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down the page to the Fees area, in the right panel.
3. A summary of the fees is displayed.


Fees

New Application
\$300.00

Payments/Adjustments
-\$200.00

Balance Due
\$100.00 **DUE**

Download Payment Voucher

 See **Download Payment Voucher (Section 6.19)** topic for details on how to download the payment voucher.

6.18 Make Payment


The submitter can open the Submission Confirmation (and Payment) page for the submission in order to make a payment if a balance is due.


This topic describes how to make a payment for a submission.

Steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Click the **Make Payment** button.



 The Make Payment button is only enabled if a payment is due.

 Selecting the View Confirmation button will also open the Submission Confirmation (and Payment) page.

5. The Submission Confirmation (and Payment) page will be opened.
6. To make a payment via check (if option available for form):
 - a. Select the **Pay by Mail** button.
 - b. Select the **Download Payment Voucher** button.
 - c. The native browser functionality will download the document.
 - d. Print the payment voucher document.
 - e. Submit payment to the agency with the payment voucher.
7. To make an online payment (if option available for form):
 - a. Select the **Pay Online** button.
 - b. Follow the steps presented in the payment processor.
 - c. Once the payment is received, the user will be navigated back to the nFORM application to continue processing.

6.19 Download Payment Voucher

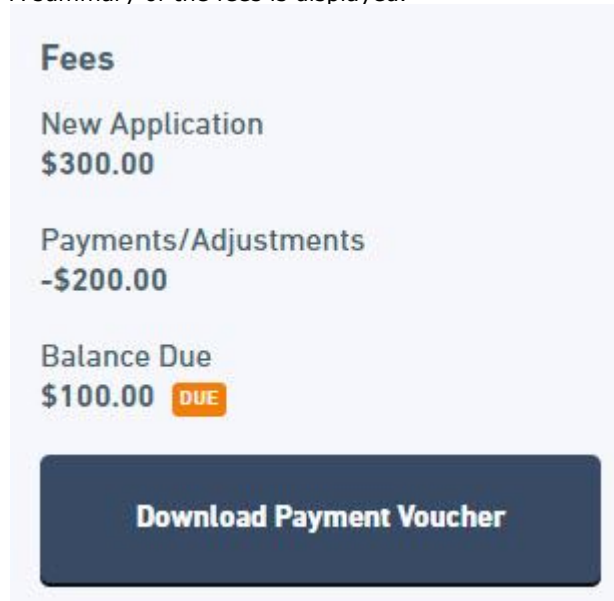
Users have the ability to view the fees assessed, payments received, adjustments applied, fees due and payment status.

This topic discusses how to view the fees.

Steps:

To view fees, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down the page to the Fees area, in the right panel.
3. A summary of the fees is displayed.



4. Select the **Download Payment Voucher** button.
5. The native browser download dialog will appear.
6. Select the save file option and (if prompted) choose a location such as "my documents" to save the file and save the file.
7. After the download is complete, navigate to the location where the file was saved and open the document. A payment voucher document will be available for remitting payment.

6.20 View Contact Information

Users have the ability to view the contacts methods (e.g., email addresses, phone numbers, addresses, etc.) for the submission.

This topic describes how to view the contact methods.

Steps:

To view contact information, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down the page to the Contact Info area, in the right panel.
3. A summary of the contact information is displayed.

Contact Info

Contact
Wastewater Branch
888 SW 1st Ave.
Bldg 1, Suite 432
Portland, OR, 97221

Payment Remittance Address
111 SW 1st St.
Portland, OR 97223

Contacts

Phone
555-555-5555

Fax
444-444-4444

6.21 View Users with Access to Submission

Users can be given access to enter data in the submission. Users can be provided with access to enter data on the submission and elevated user rights can be provided to add/remove users who have access to the submission.

This topic describes how to view the users who have access to work on the submission (excluding the current user) and their level of access.

Steps:

To view users with access to work on the submission (excluding the current user), perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down the page to the Access area, in the right panel.
3. A list of the users with access to the submission (excluding the current user) is displayed.

| Access | |
|-------------|------------------------|
| Name | Access Level |
| Kevin Lyons | Submission Editor |
| Tom Brown | Submission Contributor |


6.22 Sharing a Submission

Submissions can be shared with other users to support collaborative data entry and review. This topic describes how to share a submission with another user.

Sharing Submission from Submission Wizard

When completing a form submission the user will have the ability to share the submission with another person so they can enter data, review data or invite other users to work on the submission. The following process describes how to share a submission with another user from the Submission Wizard.

To share access to the submission with other users from the Submission Wizard, follow these steps:

1. Open the draft submission in edit mode in the Submission Wizard using the steps described in the **Edit Draft Submission (Section 6.4)** topic, if not already open.
2. Select the **Options** icon ().

Manage Shared Access

Delete Draft

3. Select the **Manage Shared Access** button () to open the Manage Access to the Submission page.


Enter the email address for the user you would like to authorize:

Adding a user will allow them to access, modify and view this submission. The user must be registered with the system to be eligible.

Can Manage Access to Submission?

Users with Access to this Submission

| ↓↑ User Name | ↓↑ Affiliation | ↓↑ Can Manage Access to Submission? | ↓↑ Is Submission Owner? | Actions |
|---------------|----------------|-------------------------------------|-------------------------------------|---------|
| Internal User | Windsor | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |

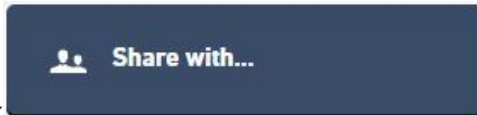
4. To share the submission, type in the email address of the user whom will receive access. Indicate if the user will be allowed to add or remove other users from the submission by selecting the **Can Manage Access to Submission?** checkbox. Select the **Add** button to add the user to the submission.
5. The system will then verify that the user exists in the system and will prompt you to confirm the selection.
6. Click the **Confirm** button to approve the user, after approval, the user will display in the list of authorized users in the grid below. After adding the user, they will be sent an email with instructions on how to access the submission.
7. Click the **Done** () button to return to the submission.

Sharing Submission from Submission Overview

When completing a form submission the user will have the ability to share the submission with another person so they can enter data, review data or invite other users to work on the submission. The following process describes how to share a submission with another user from the Submission Overview area.

To share access to the submission with other users from the Submission Overview area, follow these steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.



2. Click the **Share With** button () in the Access area down the page in the right panel to open the Manage Access to the Submission page.

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Enter the email address for the user you would like to authorize:

Adding a user will allow them to access, modify and view this submission. The user must be registered with the system to be eligible.

Can Manage Access to Submission?

Users with Access to this Submission


| User Name | Affiliation | Can Manage Access to Submission? | Is Submission Owner? | Actions |
|---------------|-------------|-------------------------------------|-------------------------------------|---------|
| Internal User | Windsor | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |

- To share the submission, type in the email address of the user whom will receive access. Indicate if the user will be allowed to add or remove other users from the submission by selecting the **Can Manage Access to Submission?** checkbox. Select the **Add** button to add the user to the submission.
- The system will then verify that the user exists in the system and will prompt you to confirm the selection.
- Click the **Confirm** button to approve the user, after approval, the user will display in the list of authorized users in the grid below. After adding the user, they will be sent an email with instructions on how to access the submission.
- Click the **Done** () button to return to the submission.

6.23 Delete Draft Submission

Draft form submissions can be deleted, if established in error.

This topic describes the steps required to delete a draft submission.

 Only submissions with a status of "Draft" are eligible to be deleted. Once a draft is deleted it cannot be recovered. For historical purposes, submitted forms can not be deleted.

Delete from Submission History






A submitter can delete draft form submission from the Submission History page using the following steps:

- View Submission History (Section 6.1)**, if not already open.


History

Total records: 181 Filtered total: 5 Page total: 5

Filter: 2020


| Submission # | Alternate Identifier | Created | Submitted | Submission Name | Status | Locked | Actions |
|----------------|----------------------|---------------------|---------------------|--------------------------|-----------------|--------|---|
| HNX-3H6C-XM10Z | | 01/27/2020 04:32 PM | | Application for Variance | Draft | No |  |
| HNP-QSYX-5FC52 | | 01/28/2020 09:16 AM | 01/28/2020 09:17 AM | Application for Variance | Submitted (Due) | No |  |
| HNP-NGFR-QQ25X | | 01/29/2020 10:11 AM | 01/30/2020 01:20 PM | Application for Variance | Submitted (Due) | No |  |
| HNX-6G8B-DRG89 | | 01/31/2020 11:21 AM | | Application for Variance | Draft | No |  |
| HNX-6GE6-8MX8T | | 01/31/2020 11:27 AM | 01/31/2020 11:35 AM | Application for Variance | Submitted (Due) | No |  |

1/1 10 per page

- Click on the **Delete** icon () next to a draft form submission for deletion. The selected submission will now be deleted.

Delete from Submission Wizard

A submitter can delete draft form submission from the Submission Wizard page using the following steps:

1. Open the draft submission in edit mode in the Submission Wizard using the steps described in the **Edit Draft Submission (Section 6.4)** topic, if not already open.
2. Select the Gear icon () near the form title in the header area and select **Delete Draft**.
3. Confirm the deletion.
4. The draft submission will be deleted.

7 Processing Submission(s)

The submission processing area of the application allows authorized internal staff to view and process form submissions. Submission processing is supported through the "Submission Overview" set of screens.

These screens replace the legacy submission view and portions of the submission detail screen, and provides the user with a more interactive environment in which to process a submission and to collaborate with the regulated entity.

At the highest level, a submitter submits a form and then has the ability to see their submission by logging into their account and selecting the relevant submission from their history tab. Upon selection of a submission the user is presented with the submission overview screen set where they can see details of their submission along with the processing status of the submission. They may also respond to any correction requests, they can download their submission and they can share it with other account holders.

Once a submission is received by an agency, an authorized staff member has the ability to review the submission and to complete workflow tasks according to the workflow that was designed to support the form. As part of this overall review process an authorized staff member can annotate the submission and request that the submitter respond to any necessary correction requests. The creation of a correction request "locks" the submission and prevents the submitter from making any changes while the staffer is in the middle of reviewing the submission. Once the staff member has defined all of their correction requests they are able to pass control back to the submitter by using the "Pass Control to Submitter" button. The collaborative process essentially switches control between the reviewer (agency staff) and the submitter.

Internal staff will have the ability to view pertinent information for a submission (e.g., current status, correction requests, revision history, etc.), view the form questions and responses as they were provided by the submitter (including comparing revisions) and perform key actions to process a submission. Staff will have the ability to perform actions on the submission such as marking processing steps as complete, changing the status of the submission, attaching document, printing/downloading the submission, printing a payment voucher, entering internal data fields and viewing/comparing prior revisions.

One or more submission processors may be assigned to a submission by virtue of workflow task assignments. The workflow can be established to notify a staff member when their task is due. If this is the case the staff member will receive an email and the relevant submission will appear on their dashboard.

A submission processor may choose to tackle tasks based on the automatic ordering of the Processing Dashboard. Alternatively, they can search, filter or re-order within the Processing Dashboard to select submissions that they wish to work on.

This section will describe the primary options for processing a form submission.

To process the standard submission, the following steps can be followed (as needed).

- **Processing & Managing Submission**

- **Begin Review (Section 7.4):** Begin Review to initiate the process lock to prevent the submitter from revising the submission (or changing correction requests) and start the submission review.
- **Change Processing Status of Submission (Section 7.5):** Change the overall processing status of a submission (e.g., to In Review), as appropriate.
- **View Submission Summary (Section 6.5):** Review the summary information for the submission.
- **View Form Questions and Responses (Section 7.7):** Review the form questions and responses as provided by the submitter.
- **Create and Process Notations (Section 7.8):** Mark submission with specific processing issues for discussion, informational messages or requests to correct submission information. Correction requests and processing issues are also processed (e.g., approved or re-opened).
 - **Create and Process Correction Requests (Section 7.8.1):** Mark specific requests for the submitter to correct or address a concern or issue with the submission and/or approve/re-open correction requests that have been addressed.
 - **Create Correction Requests (Section 7.8.1.1):** If issues are identified which require submitter attention, create correction request(s) to document

the correction.

- **View Correction Requests (Section 7.8.1.2):** If correction requests were entered previously these can be reviewed.
- **Process a Correction Request (Section 7.8.1.3):** Any "completed" correction requests can be reviewed for completeness and approved or re-opened, as appropriate.
- **Create and Process Processing Issues (Section 7.8.2):** Document areas of the submission that require internal staff attention and/or close processing issue(s) issues, as completed.
 - **Create a Processing Issue (Section 7.8.2.1):** If issues are identified which require internal staff attention, create processing issue(s) to document the issue.
 - **View Processing Issues (Section 7.8.2.2):** If processing issues were entered previously these can be reviewed.
 - **Close a Processing Issue (Section 7.8.2.3):** Any addressed processing issues can be reviewed for completeness and closed, as appropriate.
- **Create and View Notes (Section 7.8.3):** Denote additional information or notes that need to be communicated to the submitter by internal staff.
 - **Create a Note (Section 7.8.3.1):** If additional information or notes need to be communicated to the submitter by internal staff, create a note to communicate this information.
 - **View Notes (Section 7.8.3.2):** If notes were entered previously these can be reviewed.
- **View and Manage Attachments**
 - **View Attachments (Section 7.9):** View attachments associated to the submission.
 - **Create Attachments (Section 7.10):** Add additional attachments to the submission, as needed.
- **View and Populate Internal Data**
 - **View Internal Data (Section 7.11):** View internal data points, as appropriate.
 - **Populate Internal Data (Section 7.12):** Populate internal data points values, as appropriate.
- **Manage Processing Steps (Section 7.13):** Navigate to the Submission Details to assign staff to steps and mark steps as complete, as appropriate.
- **Change Processing Status of Submission (Section 7.5):** Change the overall processing status of a submission (e.g., to Action Required, Deemed Complete, Issued, Denied, etc.), as appropriate.
- **Complete Review (Section 7.14):** Complete Review to remove the process lock (allowing a user to revise a submission and change correction requests) and determine if the submitter should be notified of any open correction requests.

In addition, the following options are available when processing/managing a submission:

- **Print Submission (Section 7.15):** Print a paper copy of the submission.
- **Download Submission (Section 7.16):** Download the submission and all associated artifacts or download the copy of record for the submission.
- **View Confirmation (Section 7.17):** View the Confirmation (and Payment) page for the submission to review the confirmation the submitter can see, and the payment balance, if applicable.
- **View Submission Status History (Section 7.18):** View the history of status changes over time for the submission.
- **View and Compare Submission Revisions (Section 7.19):** View and compare revisions of the submissions, if the submission has been revised.
- **View and Manage Financials:** If fees are associated to the submission, they can

be viewed and managed and the payment voucher can be downloaded.

- **View Financials (Section 7.20):** View fees assessed, payments received, adjustments applied, fees due and payment status.
- **Download Payment Voucher (Section 7.21):** The payment voucher used to remit payment can be downloaded, presenting the fees currently due.
- **Manage Financials (Section 7.22):** If a fee charged amount needs to be changed or a payment needs to be applied, these changes can be managed.
- **View Contact Information (Section 7.23):** View the contacts mechanisms (e.g., email addresses, phone numbers, addresses, etc.) for the submission.
- **View Users with Access to Submission (Section 7.24):** View users who have been given access to enter data in the submission.
- **View Submission Event Log (Section 7.25):** View the log of key events occurring on the submission.
- **Change Submission Information:** Change the high-level submission information (e.g., submission description, form type, reference #, etc.).
- **Send Submission Data to Other System (Section 7.32):** Force a reactivation of the process to send data to the another system, in the case of failure.

7.1 View Submissions To Process

This topic describes the Submission Dashboard and viewing of submissions that are active and available for processing. By default, the Submission Dashboard is a filtered list of all active submissions in the system. Users can activate additional search filters to establish a more targeted search.

Steps

1. Click on the **Dashboard** link in the top menu.
2. The Submission Dashboard will be displayed, displaying **Only Active Submissions**.

Submission Dashboard Quick search

ASSIGNEES ORGANIZATIONS ONLY ACTIVE SUBMISSIONS ADVANCED SEARCH

586 results found

| SUBMISSION IDS | SUBMISSION DATE | SUBMISSION DATE (LATEST) | STATUS | REVISION | RESPONSIBLE PERSON | ACTIVE WORKFLOW STEP | AGE AT CURRENT STEP |
|--|-----------------------------|-------------------------------------|-----------|----------|--------------------|---|---------------------|
| HNY-T8K2-WN069 Alternate Identifier: Mike's Gas Station | 4/06/2020 (3 months ago) | 4/06/2020 (Revised 3 months ago) | SUBMITTED | 1 | | One more (gen doc for applicant) | 79 |
| HNY-Q5ZJ-YYDV1 | 4/02/2020 (3 months ago) | 4/02/2020 (Revised 3 months ago) | SUBMITTED | 1 | | | 0 |
| HNY-Q5GQ-AEQDN | 4/02/2020 (3 months ago) | 4/02/2020 (Revised 3 months ago) | SUBMITTED | 1 | | | 0 |
| HNY-Q4WT-PNH6B | 4/02/2020 (3 months ago) | 4/02/2020 (Revised 3 months ago) | SUBMITTED | 1 | | | 0 |
| HNY-PHHT-H2X7S | 4/01/2020 (3 months ago) | 4/01/2020 (Revised 3 months ago) | SUBMITTED | 1 | | | 0 |
| HNY-PHGY-FR5BQ | 4/01/2020 (3 months ago) | 4/01/2020 (Revised 3 months ago) | SUBMITTED | 1 | | | 0 |
| HNY-GWMW-GYTFZ | 3/25/2020 (3 months ago) | 3/25/2020 (Revised 3 months ago) | SUBMITTED | 1 | chuck norris | | 0 |
| HNY-G29Q-H64Q1 | 3/24/2020 (3 months ago) | 3/24/2020 (Revised 3 months ago) | SUBMITTED | 1 | | | 0 |
| HNY-G28M-9N1P5 | 3/24/2020 (3 months ago) | 3/24/2020 (Revised 3 months ago) | SUBMITTED | 1 | Brand NEW | Step 2 +2 | 92 |
| HNY-G148-MCDXH | 3/24/2020 (3 months ago) | 3/24/2020 (Revised 3 months ago) | SUBMITTED | 1 | Brand NEW | Step 2 +2 | 92 |

<< < > >> Page 12 of 59 Go to page: Show

3. The user can enter additional search filters, as desired.

Quickly find an submissions by entering a identifying property of the submission(s) in question in the **Quick Search** field.

- 💡 Quickly filter active submissions by selecting the **Assignee, Organizations** or **Only Active Submission** options.
- 💡 Advanced search attributes can be utilized by clicking upon the **Advanced Search** button.
- 💡 Columns presented in the search results can be adjusted by clicking upon the **Columns** button.

7.2 Search for Submission(s)

This topic describes a users ability to search for a specific submissions using the Find Submission, or quick search, feature of the system. Search also allows a user to access submissions that are no longer active. This type of search is performed on the Management Dashboard, Processing Dashboard or Submission List.

Steps

1. Click the **Dashboard** link in the top menu.
2. The Submission Dashboard will be displayed.

Submission Dashboard Quick search

ASSIGNEES ORGANIZATIONS ONLY ACTIVE SUBMISSIONS


586 results found


| SUBMISSION IDS | SUBMISSION DATE | SUBMISSION DATE (LATEST) | STATUS | REVISION | RESPONSIBLE PERSON | ACTIVE WORKFLOW STEP | AGE AT CURRENT STEP | |
|--|-----------------------------|-------------------------------------|-----------|----------|--------------------|----------------------------------|---------------------|---|
| HNY-T8K2-WNQ69 Alternate Identifier: Mike's Gas Station | 4/06/2020 (3 months ago) | 4/06/2020 (Revised 3 months ago) | SUBMITTED | 1 | | One more (gen doc for applicant) | 79 | > |
| HNY-Q5ZJ-YYDV1 | 4/02/2020 (3 months ago) | 4/02/2020 (Revised 3 months ago) | SUBMITTED | 1 | | | 0 | > |
| HNY-Q5GQ-AEDQN | 4/02/2020 (3 months ago) | 4/02/2020 (Revised 3 months ago) | SUBMITTED | 1 | | | 0 | > |
| HNY-Q4WT-PNH6B | 4/02/2020 (3 months ago) | 4/02/2020 (Revised 3 months ago) | SUBMITTED | 1 | | | 0 | > |
| HNY-PHHT-H2X7S | 4/01/2020 (3 months ago) | 4/01/2020 (Revised 3 months ago) | SUBMITTED | 1 | | | 0 | > |
| HNY-PHGY-FR5BQ | 4/01/2020 (3 months ago) | 4/01/2020 (Revised 3 months ago) | SUBMITTED | 1 | | | 0 | > |
| HNY-GWMW-GYTFZ | 3/25/2020 (3 months ago) | 3/25/2020 (Revised 3 months ago) | SUBMITTED | 1 | chuck norris | | 0 | > |
| HNY-G29Q-H64Q1 | 3/24/2020 (3 months ago) | 3/24/2020 (Revised 3 months ago) | SUBMITTED | 1 | | | 0 | > |
| HNY-G28M-9N1P5 | 3/24/2020 (3 months ago) | 3/24/2020 (Revised 3 months ago) | SUBMITTED | 1 | Brand NEW | Step 2 +2 | 92 | > |
| HNY-G148-MCDXH | 3/24/2020 (3 months ago) | 3/24/2020 (Revised 3 months ago) | SUBMITTED | 1 | Brand NEW | Step 2 +2 | 92 | > |

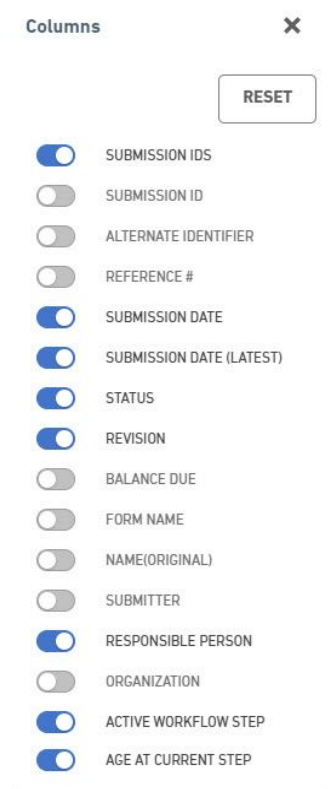
Page 12 of 59 Go to page: Show 10

3. The user has many options for searching for selection. These are broken in to two general approaches: 1) Quick Search and 2) Advanced Search.
 - a. **Quick Search:** The quick search is used to find submissions based on a generic quick search field which searches most submission attributes (e.g., Submission Numbers, form name, submission description, etc.) in addition to a few key attributes (e.g., Assignees, Organizations and Only Active Submissions). The search is refreshed in real time as soon as an attribute is changed. For example, if the user is looking for all active submissions assigned to them, they would simply select their user name in the Assignee field and ensure the Only Active Submission filter is activated.
 - b. **Advanced Search:** To perform a more targeted and advanced search, the Advanced Search capabilities can be utilized by clicking upon the Advanced Search option. Activating the Advanced Search will present the Advanced Search dialog where specific criteria can be selected and utilized.

Default nForm Agency Users Guide

This Advanced Search provides many search options for use, including the Assignees, Organizations and Only Active Submission attributes that are available in the Quick Search approach. To add new search attributes, click upon the Add Filter + button and then click upon the  icon for the desired search criteria. Once added, the corresponding search value can be entered/selected. Click the Search button to run the search.

4. Select a submission by clicking on the  button for the submission in question.
5. To aid in the searching process, the system provides users with the ability to select the column that will be displayed in the search results area. This selection is opened by clicking upon the Columns area. Once selected the user can activate or deactivate the desired display columns.



Columns X

RESET


- SUBMISSION IDS
- SUBMISSION ID
- ALTERNATE IDENTIFIER
- REFERENCE #
- SUBMISSION DATE
- SUBMISSION DATE (LATEST)
- STATUS
- REVISION
- BALANCE DUE
- FORM NAME
- NAME(ORIGINAL)
- SUBMITTER
- RESPONSIBLE PERSON
- ORGANIZATION
- ACTIVE WORKFLOW STEP
- AGE AT CURRENT STEP

7.3 View Submission Overview

This topic describes how to open the Submission Overview (Summary) area for viewing. The Submission area is the primary location where a Submissions Processor will update the processing statuses of submissions and communicate with the submitter during processing.

Open from Processing Dashboard

To open the Submission Overview area from the Processing Dashboard, perform the following steps:

1. Click on the **Dashboard** link in the top menu.
2. The Processing Dashboard will be displayed, displaying active submissions.
3. Open the Submission by clicking the **view** icon () for the submission in question.
4. The Submission Overview page will be opened.

SUBMISSION OVERVIEW
View Form
A complete view of the submitted form data

Application for Variance

ID # HNP-NGFR-QQ25X REVISION 6

Summary

Revisions

Processing

SUBMISSION ALIAS Application for Variance

SUBMITTED 02/04/2020 (0 days ago) by [External User](#)

REFERENCE # —

SUBMISSION ID HNP-NGFR-QQ25X

DESCRIPTION Acme's Application for Variance

SUBMISSION REASON New

PROJECT TYPE(S) —

PROJECT TYPE(S) JUSTIFICATION —

RESPONSIBLE PERSON —

Notes & Issues Add New

ALL (4) CORRECTION REQUEST (2) NOTE (2) PROCESSING ISSUE (2)

CONTACT > MAILING ADDRESS

Correct City/ZIP Code — The ZIP code does not match the city. Please correct. ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:45 PM

Review Client Financial Standing ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:13 PM INTERNAL-ONLY

CONTACT > NAME OF OWNER SEEKING A VARIANCE

Correct Owner — Public records indicate that the owner is currently Sally Way, Ple... ACTION REQUIRED

Added by Kevin Lyons 2019-05-10 1:32 PM

SHOW MORE

Processing View All Manage

2 OF 10 8 OF 10

2A Application Review is Completed ...

DUE ON 02/09/2020

[Sina Pruder](#)

2B Applicant is notified of comments ...

DUE ON 02/09/2020

[Sina Pruder](#)

Status SUBMITTED

Begin Review
During review the applicant will be locked out of the form.

Print

Download / Export

View Confirmation

Fees

New Application **\$300.00**

Balance Due **\$300.00** DUE

Download Payment Voucher

Contact Info

Contact
Wastewater Branch
888 SW 1st Ave.
Bldg 1, Suite 432
Portland, OR, 97221

Payment Remittance Address
111 SW 1st St.
Portland, OR 97223

Contacts

Phone
555-555-5555

Fax
444-444-4444

Access

| Name | Access Level |
|--------------|-------------------------|
| Staff User | Submission Editor |
| Thomas Brown | Submission Share Editor |

Event Log

Submission Unlocked - Submission Unlocked
Change Audit - Created
Internal User 2020-02-04 1:53 PM

Submission Locked - Submission Locked
Change Audit - Created
Internal User 2020-02-04 12:00 PM

Submission Unlocked - Submission Unlocked
Change Audit - Created
Internal User 2020-02-04 11:48 AM

Show 15 More Events

Documents & Attachments Add New

ALL (3) ADDED BY PROCESSOR (1) SUBMISSION ATTACHMENTS (2)

Construction Permit.pdf

Attached to Submission by [External User](#) 2020-02-04 11:58 AM SUBMISSION ATTACHMENT VISIBLE TO APPLICANT

Section: Specific Information Control: H. Upload All Attachment(s) Here

Variance Plan.pdf

Attached to Submission by [External User](#) 2020-02-04 11:58 AM SUBMISSION ATTACHMENT VISIBLE TO APPLICANT

Section: Identify Section of Chapter 11-62

Public Notice Plan.pdf

Attached to Submission by [Kevin Lyons](#) 2019-05-15 12:17 PM ADDED BY PROCESSOR

Internal Data

PROCESSING DUE DATE 5/30/2019


PUBLIC MEETING DATE 5/23/2019

Open from Submission Search Results List

To open the Submission Overview area from the Submission Search Results List, perform the following steps:

1. Click on the **Dashboard** link in the top menu.
2. The Processing Dashboard will be displayed, displaying active submissions.
3. In the Find Submission textbox at the top right, type in your search criteria (such as submission number, the person assigned to the current processing step, and click the **Go** button.
4. The Submission Search Results List will be displayed.



- Open the Submission by clicking the **view** icon () for the submission in question.
- The Submission will be opened.

SUBMISSION OVERVIEW

Application for Variance

ID # HNP-NGFR-Q025X REVISION 6

View Form

A complete view of the submitted form data

Summary

Revisions

Processing

SUBMISSION ALIAS Application for Variance

SUBMITTED 02/04/2020 (0 days ago) by External User

REFERENCE # —

SUBMISSION ID HNP-NGFR-Q025X

DESCRIPTION Acme's Application for Variance

SUBMISSION REASON New

PROJECT TYPE(S) —

PROJECT TYPE(S) JUSTIFICATION —

RESPONSIBLE PERSON —

Notes & Issues Add New

ALL (4)

CORRECTION REQUEST (2)
NOTE (2)
PROCESSING ISSUE (2)

CONTACT - MAILING ADDRESS

Correct City/ZIP Code — The ZIP code does not match the city. Please correct. ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:45 PM

CONTACT - NAME OF OWNER SEEKING A VARIANCE

Review Client Financial Standing ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:13 PM INTERNAL-ONLY

CONTACT - NAME OF OWNER SEEKING A VARIANCE

Correct Owner — Public records indicate that the owner is currently Sally Way. Ple... ACTION REQUIRED

Added by Kevin Lyons 2019-05-10 1:32 PM

SHOW MORE

Processing View All Manage

2 OF 10
8 OF 10

2A Application Review is Completed ...

DUE ON 02/09/2020

Sina Pruder

2B Applicant is notified of comments ...

DUE ON 02/09/2020

Sina Pruder

Documents & Attachments Add New

ALL (3)

ADDED BY PROCESSOR (1)
SUBMISSION ATTACHMENTS (2)

Construction Permit.pdf

Attached to Submission by External User 2020-02-04 11:58 AM SUBMISSION ATTACHMENT VISIBLE TO APPLICANT

Section: Specific Information Control: H. Upload All Attachment(s) Here

Variance Plan.pdf

Attached to Submission by External User 2020-02-04 11:58 AM SUBMISSION ATTACHMENT VISIBLE TO APPLICANT

Section: Identify Section of Chapter 11-62

Public Notice Plan.pdf

Attached to Submission by Kevin Lyons 2019-05-15 12:17 PM ADDED BY PROCESSOR

Internal Data

PROCESSING DUE DATE 5/30/2019

PUBLIC MEETING DATE 5/23/2019

Status SUBMITTED

Begin Review

During review the applicant will be locked out of the form.

Print

Download / Export

View Confirmation

Fees

New Application \$300.00

Balance Due \$300.00 DUE

Download Payment Voucher

Contact Info

Contact
Wastewater Branch
888 SW 1st Ave.
Bldg 1, Suite 432
Portland, OR, 97221

Payment Remittance Address
111 SW 1st St.
Portland, OR 97223

Contacts

Phone
555-555-5555

Fax
444-444-4444

Access

| Name | Access Level |
|--------------|-------------------------|
| Staff User | Submission Editor |
| Thomas Brown | Submission Share Editor |

Event Log

Submission Unlocked - Submission Unlocked
Change Audit - Created
Internal User 2020-02-04 1:53 PM

Submission Locked - Submission Locked
Change Audit - Created
Internal User 2020-02-04 12:00 PM

Submission Unlocked - Submission Unlocked
Change Audit - Created
Internal User 2020-02-04 11:48 AM

Show 15 More Events

Steps:

7.4 Begin Submission Review

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To facilitate the review process, begin and complete review states are available for the form. Beginning the Review will enable a processing lock on the form to prevent the submitter from revising the form during the review process and signify that the form is being reviewed. Note: the form will automatically be placed in the review state when a correction request is added.

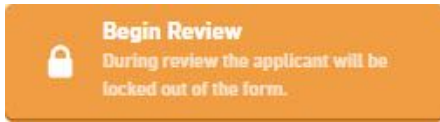
This topic describes how to Begin Review to initiate the process lock to prevent the submitter from revising the submission (or changing correction requests) and start the submission review.

Steps

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.

The screenshot displays the 'Application for Variance' submission overview page. At the top, there's a 'View Form' button. The main content area is divided into several sections: 'SUBMISSION ALIAS' (Application for Variance), 'SUBMITTED' (02/04/2020), 'REFERENCE #', 'SUBMISSION ID' (HNP-NGFR-0025X), 'DESCRIPTION' (Acme's Application for Variance), 'SUBMISSION REASON' (New), 'PROJECT TYPE(S)', 'PROJECT TYPE(S) JUSTIFICATION', and 'RESPONSIBLE PERSON'. Below this is the 'Notes & Issues' section with three items: 'Correct City/ZIP Code', 'Review Client Financial Standing', and 'Correct Owner'. The 'Processing' section shows two steps: 'Application Review is Completed' and 'Applicant is notified of comments'. The 'Documents & Attachments' section lists 'Construction Permit.pdf', 'Variance Plan.pdf', and 'Public Notice Plan.pdf'. The 'Internal Data' section shows 'PROCESSING DUE DATE' (5/30/2019) and 'PUBLIC MEETING DATE' (5/23/2019). The right-hand sidebar contains 'Status' (SUBMITTED), 'Fees' (New Application \$300.00, Balance Due \$300.00), 'Contact Info' (Wastewater Branch, 888 SW 1st Ave.), 'Payment Remittance Address' (111 SW 1st St.), 'Contacts' (Phone: 555-555-5555, Fax: 444-444-4444), 'Access' (Staff User: Submission Editor, Thomas Brown: Submission Share Editor), and 'Event Log' (Submission Unlocked - Submission Unlocked Change Audit - Created Internal User 2020-02-04 1:53 PM, Submission Locked - Submission Locked Change Audit - Created Internal User 2020-02-04 12:00 PM, Submission Unlocked - Submission Unlocked Change Audit - Created Internal User 2020-02-04 11:48 AM). A 'Show 15 More Events' button is at the bottom of the event log.

2. Click on the **Begin Review** button.



3. A processing lock will be established on the submission which will prevent the submitter from revising the submission.

Application for Variance
 ID # HNP-NGFR-QQ25X REVISION 6 LOCKED

Summary
 Revisions
 Processing

SUBMISSION ALIAS: Application for Variance
 SUBMITTED: 02/04/2020 (0 days ago) by External User
 REFERENCE #: —
 SUBMISSION ID: HNP-NGFR-QQ25X
 DESCRIPTION: Acme's Application for Variance
 SUBMISSION REASON: New
 PROJECT TYPE(S): —
 PROJECT TYPE(S) JUSTIFICATION: —
 RESPONSIBLE PERSON: —

Notes & Issues Add New

| ALL (6) | CORRECTION REQUEST (2) | NOTE (2) | PROCESSING ISSUE (2) |
|--|---|---|----------------------|
| CONTACT - MAILING ADDRESS | | | |
| 2 | Correct City/ZIP Code — The ZIP code does not match the city. Please correct. | Added by Kevin Lyons 2019-05-14 4:45 PM | ACTON REQUIRED |
| CONTACT - NAME OF OWNER SEEKING A VARIANCE | | | |
| 1 | Review Client Financial Standing | Added by Kevin Lyons 2019-05-14 4:13 PM INTERNAL-ONLY | ACTON REQUIRED |
| CONTACT - NAME OF OWNER SEEKING A VARIANCE | | | |
| 2 | Correct Owner — Public records indicate that the owner is currently Sally Way. Ple... | Added by Kevin Lyons 2019-05-10 1:32 PM | ACTON REQUIRED |

Status SUBMITTED

Complete Review
 Completions will reinstate access to the applicant.

Print
 Download / Export
 View Confirmation

Fees

New Application \$300.00
 Balance Due \$300.00 DUE


Download Payment Voucher

7.5 Change Processing Status of Submission

Each submission is assigned a high-level processing status. Upon submission, it is assigned a status of "Submitted" and this can be changed by the processor as the submission works through the workflow process. Modifying status is a simple but powerful task that is achieved by selecting the wrench icon in the status panel and selecting the appropriate state.

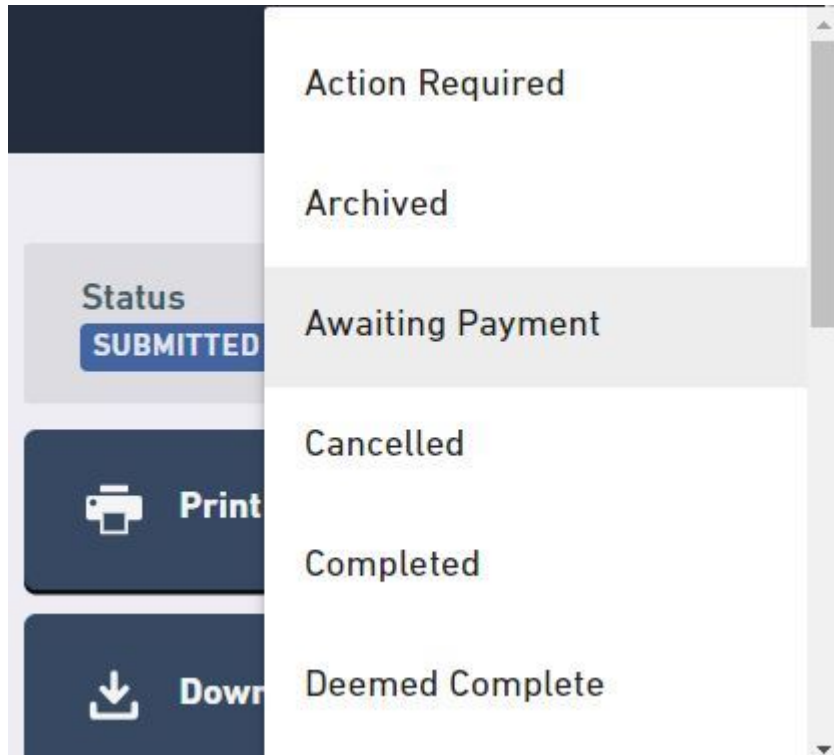
This topic describes the how the submission status can be changed by the processor.


Steps:


1. [Open the Submission](#), if not open already.
2. Click on the Status Change Icon () to open the status selector list.



3. Select the new status from the status selector list.



 The available statuses can vary from one installation to another.

 Some agencies have their system configured such that a status change results in specific actions. For instance selecting a final status (list final states) will lock the submission down for both the submitter and staff.

4. Confirm the status change by clicking the **OK** button on the confirmation dialog.

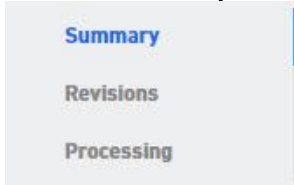
7.6 View Submission Summary

This topic describes how to open the summary information for the submission. This area was designed to streamline the process of reviewing a submission. The review process begins after the first submission of a form.

Steps

To open the Submission View page from the Processing Dashboard, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Click on the **Summary** link on the left navigation panel.



3. The Summary view will be displayed, displaying the summary information for the submission.

Default nForm Agency Users Guide

View Form
A complete view of the submitted form data

SUBMISSION OVERVIEW

Application for Variance

ID # HNP-NGFR-0025X REVISION 4

- Summary
- Revisions
- Processing

SUBMISSION ALIAS **Application for Variance**

SUBMITTED **02/04/2020** (0 days ago) by External User

REFERENCE # **—**

SUBMISSION ID **HNP-NGFR-0025X**

DESCRIPTION **Acme's Application for Variance**

SUBMISSION REASON **New**

PROJECT TYPE(S) **—**

PROJECT TYPE(S) JUSTIFICATION **—**

RESPONSIBLE PERSON **—**

Notes & Issues Add New

ALL (6)
CORRECTION REQUEST (2)
NOTE (2)
PROCESSING ISSUE (2)

CONTACT - MAILING ADDRESS

? **Correct City/ZIP Code** — The ZIP code does not match the city. Please correct.
 ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:45 PM

CONTACT - FINANCIAL RECORDS

! **Review Client Financial Standing**
ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:13 PM INTERNAL-ONLY

CONTACT - NAME OF OWNER SEEKING A VARIANCE

? **Correct Owner** — Public records indicate that the owner is currently Sally Way, Ple...
 ACTION REQUIRED

Added by Kevin Lyons 2019-05-10 1:32 PM

SHOW MORE

Processing View All Manage

2 OF 10
8 OF 10

2A Application Review is Completed ...

DUE ON 02/09/2020

Sina Pruder

2B Applicant is notified of comments ...

DUE ON 02/09/2020

Sina Pruder

Status

SUBMITTED 🔧 ⌛

Begin Review

During review the applicant will be locked out of the form.

Print

Download / Export

View Confirmation

Fees ✎

New Application **\$300.00**

Balance Due **\$300.00** DUE

Download Payment Voucher

Contact Info

Contact
 Wastewater Branch
 888 SW 1st Ave.
 Bldg 1, Suite 432
 Portland, OR, 97221

Payment Remittance Address
 111 SW 1st St.
 Portland, OR 97223

Contacts

Phone
 555-555-5555

Fax
 444-444-4444

Access

| Name | Access Level |
|--------------|-------------------------|
| Staff User | Submission Editor |
| Thomas Brown | Submission Share Editor |

Event Log

Submission Unlocked - Submission Unlocked

Change Audit - Created

Internal User 2020-02-04 1:53 PM

Submission Locked - Submission Locked

Change Audit - Created

Internal User 2020-02-04 12:00 PM

Submission Unlocked - Submission Unlocked

Change Audit - Created

Internal User 2020-02-04 11:48 AM

Show 15 More Events

Documents & Attachments Add New

ALL (3)
ADDED BY PROCESSOR (1)
SUBMISSION ATTACHMENTS (2)

Construction Permit.pdf

Attached to Submission by External User 2020-02-04 11:58 AM SUBMISSION ATTACHMENT VISIBLE TO APPLICANT

Section: Specific Information Control: H: Upload All Attachment(s) Here

Variance Plan.pdf

Attached to Submission by External User 2020-02-04 11:58 AM SUBMISSION ATTACHMENT VISIBLE TO APPLICANT

Section: Identify Section of Chapter 11-62

Public Notice Plan.pdf

Attached to Submission by Kevin Lyons 2019-05-15 12:17 PM ADDED BY PROCESSOR

Internal Data

PROCESSING DUE DATE **5/30/2019**

PUBLIC MEETING DATE **5/23/2019**

7.7 View Form Questions and Responses

This topic describes how to open the submitter provided questions and responses.

Steps

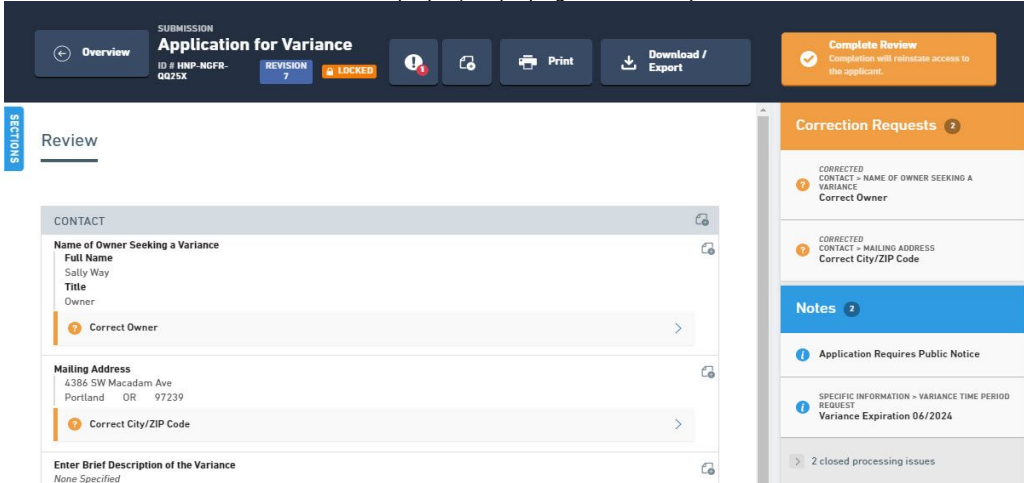
To open the Submission Form Questions & Responses (i.e., Form) page, perform the following steps:

1. [Open the Submission](#), if not open already.
2. Click on the **View Form** button on the left navigation panel.



Please note that the View Form button may be presented with an orange color if correction requests exist.

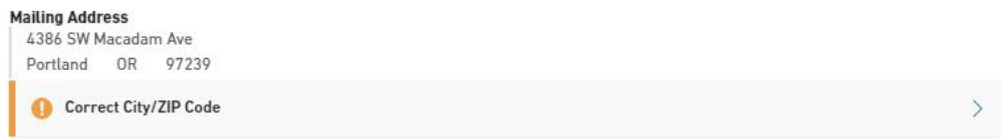
3. The Submission Overview form will be displayed, displaying the summary information for the submission.



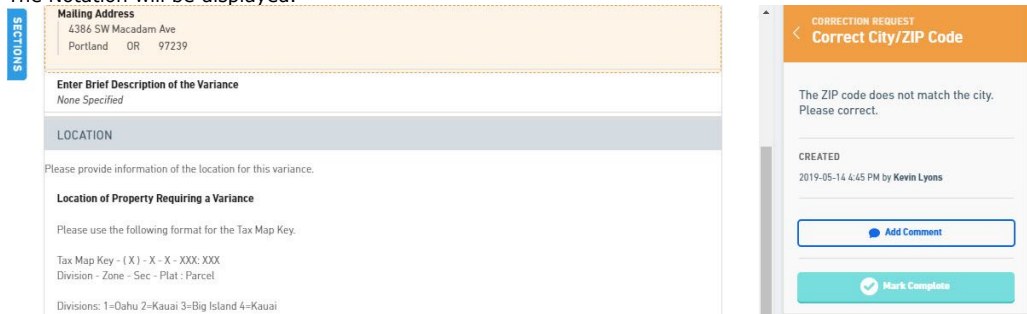
Variations

Navigate to a Section/Control level Notation:

1. Click on the Go To (>) to the right of the Correction Request, Note or Processing Issue in the Notes and Issues list or within a Form.



2. The Notation will be displayed.



Activate Notation Panel:

1. Click **Correction Requests, Notes or Processing Issues** in the tabs to the right of the page.

Review

CONTACT

Name of Owner Seeking a Variance

Full Name
Kevin Lyons

Title
Project Manager

Mailing Address
4386 SW Macadam Ave
Portland OR 97239

Correct City/ZIP Code

CORRECTION REQUESTS (1)
NOTES (2)

2. The Notification Panel will be displayed.

SECTIONS

Review

CONTACT

Name of Owner Seeking a Variance

Full Name
Kevin Lyons

Title
Project Manager

Mailing Address
4386 SW Macadam Ave
Portland OR 97239

Correct City/ZIP Code

Correction Requests 1

CREATED CONTACT - MAILING ADDRESS
Correct City/ZIP Code

Notes 2

Application Requires Public Notice

SPECIFIC INFORMATION - VARIANCE TIME PERIOD REQUEST
Variance Expiration 06/2024

1 corrected correction request

7.8 Notation Introduction

A submission processor can add notes to a submission at any time during processing and these can be assigned at the form, section or control level within the submission. Notes are for informational purposes only and do not indicate an error or issue. A note can be specified for display to the submitter (and internal staff), or for internal viewing only. Additionally, attachments (e.g., final permit, public notice template, etc.) can be added to a note.

This topics discusses the ability a processor has to mark submission with specific processing issues for discussion, informational messages or requests to correct submission information. Notations can be records for the submission as a whole, a specific section of the submission or a specific question asked of a submitter within the submission. Notations can be record as three different types, including:

- Correction Requests:** Correction requests represent a discrepancy that must be addressed or corrected by the submitter. Correction Requests have a life cycle, and must first be created by a processor, corrected and marked complete by the submitter, then approved by the processor if considered resolved, if a correction that has been marked as complete by the submitter is unsatisfactory, it can be reopened by the processor. Submitters cannot submit a revision without marking all correction requests as complete, to ensure all correction requests are addressed prior to continued processing. When a correction is requested from the processor, if the processor has not yet Begun Submission Review, the processor will be prompted to place a processing lock on the submission, or cancel the request, with no Correction Request being created.
- Processing Issues:** Processing issues are notations that signify a issue during processing or a potential concern that needs to be followed-up upon. By nature, processing issues are only visible to internal processors. Processing issues have a workflow component allows for a processor to establish the issue, and for the same, or another processor, to complete the processing issue.
- Notes:** Notes are created by the processor and do not have an associated workflow and do not require the activation of the processing lock. These are typically used to convey helpful information regarding the submission itself, but can be designated as internal only notes as well if information simply needs to be shared within the agency.

The topics in this area will discuss how to interact with the notations, including:

- Correction Requests (Section 7.8.1)**
- Processing Issues (Section 7.8.2)**

- **Notes (Section 7.8.3)**

7.8.1 Correction Request Introduction

Correction requests represent a discrepancy that must be addressed or corrected by the submitter. Correction Requests have a life cycle, and must first be created by a processor, corrected and marked complete by the submitter, then approved by the processor to be considered resolved, if a correction that has been marked as complete by the submitter is unsatisfactory, it can be reopened by the processor. Submitters cannot submit a revision without marking all correction requests as complete, to ensure all correction requests are addressed prior to continued processing. When a correction is requested from the processor, if the processor has not yet Begun Submission Review, the processor will be prompted to place a processing lock on the submission, or cancel the request, with no Correction Request being created.

This topic discusses, how to:

- **Create a Correction Request (Section 7.8.1.1)**
- **View a Correction Request (Section 7.8.1.2)**
- **Process a Correction Request (Section 7.8.1.3)**

7.8.1.1 Create Correction Request

Correction requests are requests for the submitter to correct or address a concern or issue with the submission. Correction Requests have a life cycle, and must first be created by a processor, corrected and marked complete by the submitter, then approved by the processor to be considered resolved, if a correction that has been marked as complete by the submitter is unsatisfactory, it can be reopened by the processor. Submitters cannot submit a revision without marking all correction requests as complete, to ensure all correction requests are addressed prior to continued processing.

This topics discusses how to create a correction request.

Steps to Create Correction Request from Submission Overview - Summary

To create a processing issue for the submission from the Submission Overview Summary, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.

SUBMISSION OVERVIEW

Application for Variance

View Form
A complete view of the submitted form data

Summary

Revisions

Processing

SUBMISSION ALIAS Application for Variance

SUBMITTED 02/04/2020 (0 days ago) by [External User](#)

REFERENCE # —

SUBMISSION ID HNP-NGFR-QQ25X

DESCRIPTION Acme's Application for Variance

SUBMISSION REASON New

PROJECT TYPE(S) —

PROJECT TYPE(S) JUSTIFICATION —

RESPONSIBLE PERSON —

Notes & Issues Add New

ALL (6) CORRECTION REQUEST (2) NOTE (2) PROCESSING ISSUE (2)

CONTACT - MAILING ADDRESS

Correct City/ZIP Code — The ZIP code does not match the city. Please correct. ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:45 PM

Review Client Financial Standing ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:13 PM INTERNAL-ONLY

CONTACT - NAME OF OWNER SEEKING A VARIANCE

Correct Owner — Public records indicate that the owner is currently Sally Way, Ple... ACTION REQUIRED

Added by Kevin Lyons 2019-05-10 1:32 PM

[SHOW MORE](#)

Processing View All Manage

2 OF 10 **8 OF 10**

2A Application Review is Completed ...

DUE ON 02/09/2020

[Sina Pruder](#)

2B Applicant is notified of comments ...

DUE ON 02/09/2020

[Sina Pruder](#)

Documents & Attachments Add New

ALL (3) ADDED BY PROCESSOR (1) SUBMISSION ATTACHMENTS (2)

Construction Permit.pdf

Attached to Submission by External User 2020-02-04 11:58 AM SUBMISSION ATTACHMENT VISIBLE TO APPLICANT

Section: Specific Information Control: H: Upload All Attachment(s) Here

Variance Plan.pdf

Attached to Submission by External User 2020-02-04 11:58 AM SUBMISSION ATTACHMENT VISIBLE TO APPLICANT

Section: Identify Section of Chapter 11-42

Public Notice Plan.pdf

Attached to Submission by Kevin Lyons 2019-05-15 12:17 PM ADDED BY PROCESSOR

Internal Data

PROCESSING DUE DATE **5/30/2019**

PUBLIC MEETING DATE **5/23/2019**

Status Refresh

SUBMITTED

Begin Review

During review the applicant will be locked out of the form.

Print

Download / Export

View Confirmation

Fees Edit

New Application **\$300.00**

Balance Due **\$300.00** DUE

Download Payment Voucher

Contact Info

Contact
Wastewater Branch
888 SW 1st Ave.
Bldg 1, Suite 432
Portland, OR, 97221

Payment Remittance Address
111 SW 1st St.
Portland, OR 97223

Contacts

Phone
555-555-5555

Fax
444-444-4444

Access

| Name | Access Level |
|--------------|-------------------------|
| Staff User | Submission Editor |
| Thomas Brown | Submission Share Editor |

Event Log

Submission Unlocked - Submission Unlocked
Change Audit - Created
Internal User 2020-02-04 1:53 PM

Submission Locked - Submission Locked
Change Audit - Created
Internal User 2020-02-04 12:00 PM

Submission Unlocked - Submission Unlocked
Change Audit - Created
Internal User 2020-02-04 11:48 AM

[Show 15 More Events](#)

2. Create a Correction Request by clicking on the Add New button in the Notes & Issues list area.
3. Select Create Correction Request from the menu.

Create Correction Request

Create Note

Create Processing Issue

4. Populate the details of the correction request, including a title, description and an attachment as appropriate. The user can also select a Standard Text Template (if established in form design) to populate the description. Click Ok to create the correction request.

Correction Request for Facility Data

Title


Standard Text Templates

▼

Description

Attachments

Drop files here to upload




OR

CHOOSE FILE

Cancel

OK

 When a correction is requested, if the processor has not yet established a process lock for review (**Begin Submission Review (Section 7.4)**) for the submission, the user will be prompted to place a processing lock on the submission, or cancel the request, with no Correction Request created. Standard notes can be created without locking the submission as can processing issues.


5. The correction request will be displayed in the Notes & Issues list.

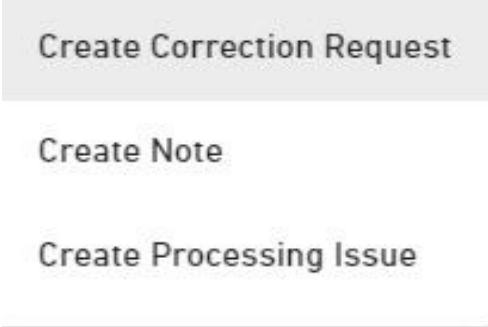
Steps to Create Correction Request from Submission Overview - Form View

To create a correction request for the submission from the Submission Overview Form View, perform the following steps:

1. **View Form Questions and Response (Section 7.7)**, if not open already.



2. Create a Correction Request by clicking on the notation menu icon () for the Submission (in the header), a specific Section (in the section header), or a specific Control (to the right of the control label).
3. Select Create Correction Request from the menu.



4. Populate the details of the correction request, including a title, description and an attachment as appropriate. The user can also select a Standard Text Template (if established in form design) to populate the description. Click Ok to create the correction request.

Correction Request for Facility Data

Title


*

Standard Text Templates

Description

Attachments


Drop files here to upload



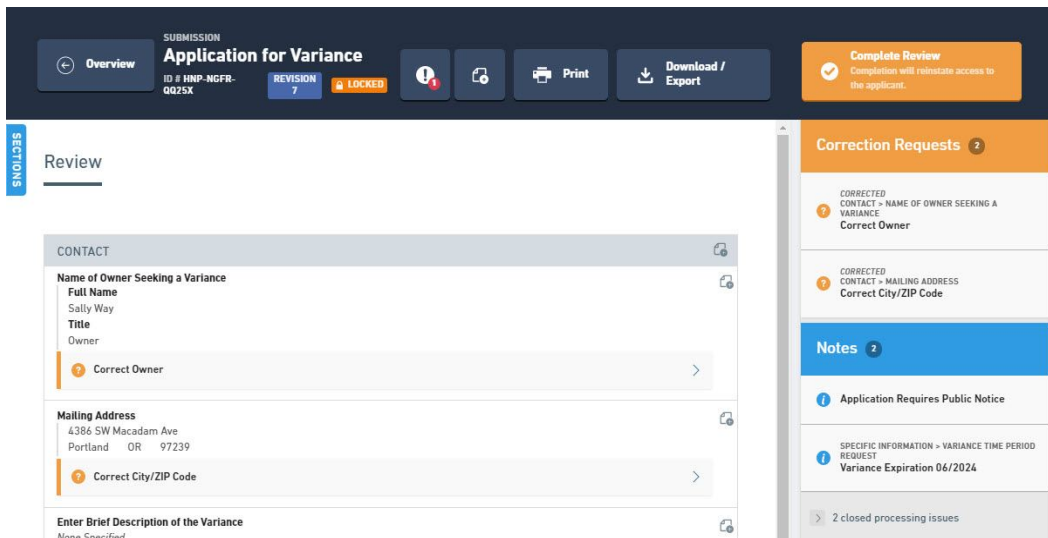
OR

CHOOSE FILE

Cancel OK

 When a correction is requested, if the processor has not yet established a process lock for review (**Begin Submission Review (Section 7.4)**) for the submission, the user will be prompted to place a processing lock on the submission, or cancel the request, with no Correction Request created. Standard notes can be created without locking the submission as can processing issues.

5. The correction request will be displayed with the relevant submission, section or control as well as in the summary panel on the right.



7.8.1.2 View Correction Request

Correction requests are requests for the submitter to correct or address a concern or issue with the submission. Correction Requests have a life cycle, and must first be created by a processor, corrected and marked complete by the submitter, then approved by the processor to be considered resolved, if a correction that has been marked as complete by the submitter is unsatisfactory, it can be reopened by the processor. Submitters cannot submit a revision without marking all correction requests as complete, to ensure all correction requests are addressed prior to continued processing.

This topics discusses how to view a correction request.

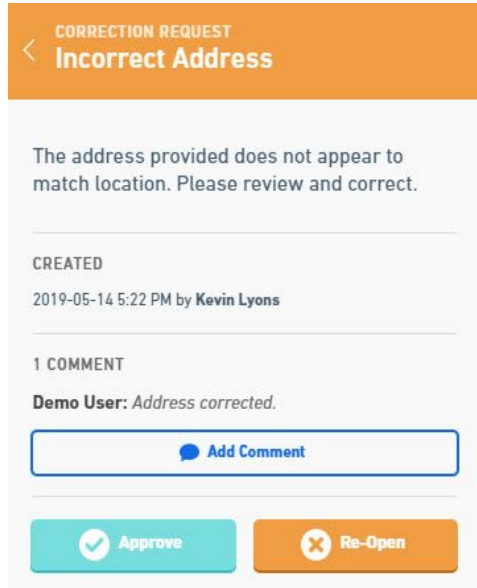
View Correction Request from Submission Summary

To view a correction request from the Submission Summary area, follow these steps:

1. **View Submission Overview Summary (Section 6.5)**, if not open already.
2. Find an open correction request (new and completed corrections appear as open for processors) and select it.



3. The details of the correction request will be presented. The specific section or control for which the correction request relates will be highlighted, if documented at that level.

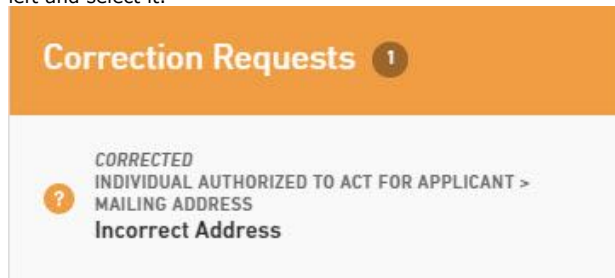


4. Review the correction request.

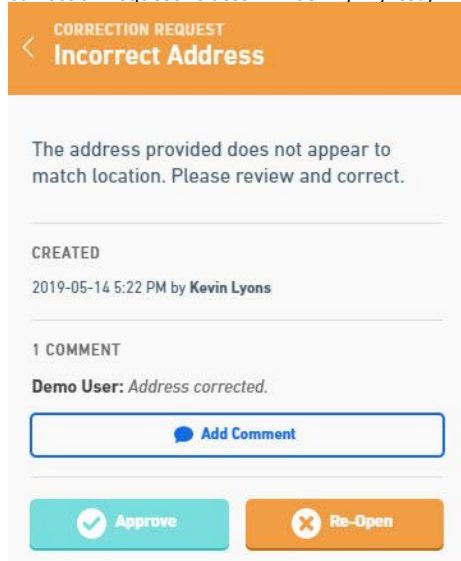
View Correction Request from Form Questions and Responses

To view a correction request from the Form Questions and Responses area, follow these steps:

1. **View Form Questions and Response (Section 7.7)**, if not open already.
2. Find an open correction request (new and completed corrections appear as open for processors) on the left and select it.



3. The details of the correction request will be presented. The specific section or control for which the correction request relates will be highlighted, if documented at that level.





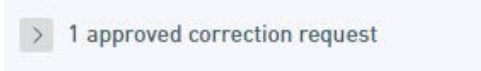
- Review the correction request and the corresponding correction.

Variations

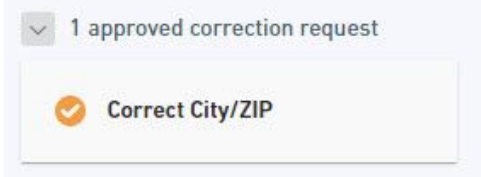
Open Approved Correction Request:

To open an approved correction request, perform the following:

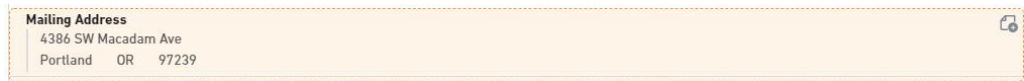
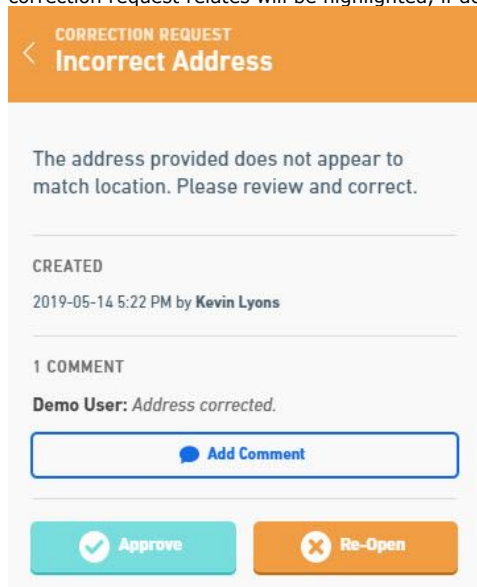
- View **Submission Summary (Section 6.5)** or **View Form Questions and Response (Section 7.7)**, if not open already.
- Click on the "N approved correction request(s)" area on the right panel.



- The list of approved correction requests will be displayed.



- Find the correction request in question and select it.
- The details of the correction request will be presented. The specific section or control for which the correction request relates will be highlighted, if documented at that level.



- Review the correction request.

7.8.1.3 Process Correction Request

Correction requests are requests for the submitter to correct or address a concern or issue with the submission. Correction Requests have a life cycle, and must first be created by a processor, corrected and marked complete by the submitter, then approved by the processor to be considered resolved, if a correction that has been marked as complete by the submitter is unsatisfactory, it can be reopened by the processor. Submitters cannot submit a revision without marking all correction requests as complete, to ensure all correction requests are addressed prior to continued processing. When a correction is requested from the processor, if the processor has not yet Begun Submission Review, the processor will be prompted to place a processing lock on the submission, or cancel the request, with no Correction Request being created.

This topic discusses how to "process" a correction request.

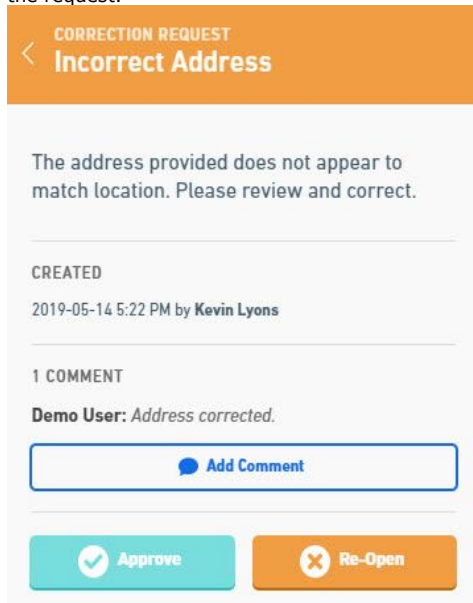
Process Correction Request from Submission Summary

To process (i.e., approve or re-open) a correction request from the Submission Summary area, follow these steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Find a "Corrected" correction request (new and completed corrections appear active for processors) and select it.



3. The details of the correction request will be presented. The specific section or control for which the correction request relates will be highlighted, if documented at that level.
4. Review the request and the corresponding correction and make a determination as to approve or re-open the request.

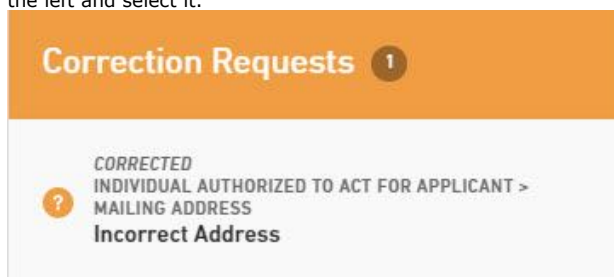


5. Select the Approve button to approve (and close) the correction request. Select the Re-Open button to re-open the request and prepare the correction request to be sent back to the submitter.

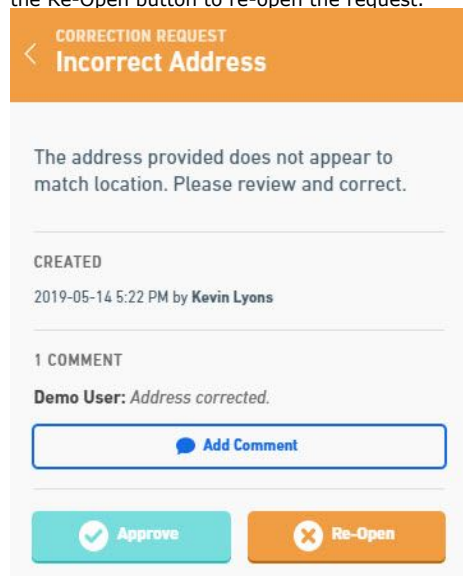
Process Correction Request from Form Questions and Responses

To process (i.e., approve or re-open) a correction request from the Form Questions and Responses area, follow these steps:

1. **View Form Questions and Response (Section 7.7)**, if not open already.
2. Find a "Corrected" correction request (new and completed corrections appear active for processors) on the left and select it.



- The details of the correction request will be presented. The specific section or control for which the correction request relates will be highlighted, if documented at that level.
- Review the request and the corresponding correction and make a determination as to approve or re-open the request. Select the Approve button to approve the correction and close the correction request. Select the Re-Open button to re-open the request.



- Select the Approve button to approve (and close) the correction request. Select the Re-Open button to re-open the request and prepare the correction request to be sent back to the submitter.

7.8.2 Processing Issue Introduction

Processing issues are notations that signify a issue during processing or a potential concern that needs to be followed-up upon. By nature, processing issues are only visible to internal processors. Processing issues have a workflow component allows for a processor to establish the issue, and for the same, or another processor, to complete the processing issue.

This topic discusses, how to:

- **Create a Processing Issue (Section 7.8.2.1)**
- **View a Processing Issue (Section 7.8.2.2)**
- **Close a Processing Issue (Section 7.8.2.3)**

7.8.2.1 Create Processing Issue

Processing issues are notations that signify a issue during processing or a potential concern that needs to be followed-up upon. By nature, processing issues are only visible to internal processors. Processing issues have a workflow component allows for a processor to establish the issue, and for the same, or another processor, to complete the processing issue.

This topic discusses how to create a processing issue.

Steps to Create Processing Issue from Submission Overview - Summary

To create a processing issue for the submission from the Submission Overview Summary, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.

SUBMISSION OVERVIEW

Application for Variance

View Form
A complete view of the submitted form data

Summary

Revisions

Processing

| | |
|-------------------------------|--|
| SUBMISSION ALIAS | Application for Variance |
| SUBMITTED | 02/04/2020 (0 days ago) by External User |
| REFERENCE # | — |
| SUBMISSION ID | HNP-NGFR-QQ25X |
| DESCRIPTION | Acme's Application for Variance |
| SUBMISSION REASON | New |
| PROJECT TYPE(S) | — |
| PROJECT TYPE(S) JUSTIFICATION | — |
| RESPONSIBLE PERSON | — |

Notes & Issues Add New

ALL (4) CORRECTION REQUEST (2) NOTE (2) PROCESSING ISSUE (2)

CONTACT - MAILING ADDRESS

Correct City/ZIP Code — The ZIP code does not match the city. Please correct. ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:45 PM

Review Client Financial Standing ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:13 PM INTERNAL-ONLY

CONTACT - NAME OF OWNER SEEKING A VARIANCE

Correct Owner — Public records indicate that the owner is currently Sally Way, Ple... ACTION REQUIRED

Added by Kevin Lyons 2019-05-10 1:32 PM

[SHOW MORE](#)

Processing [View All](#) [Manage](#)

2 OF 10 8 OF 18

2A Application Review is Completed ...

DUE ON 02/09/2020

[Sina Pruder](#)

2B Applicant is notified of comments ...

DUE ON 02/09/2020

[Sina Pruder](#)

Documents & Attachments Add New

ALL (3) ADDED BY PROCESSOR (1) SUBMISSION ATTACHMENTS (2)

Construction Permit.pdf

Attached to Submission by External User 2020-02-04 11:58 AM SUBMISSION ATTACHMENT VISIBLE TO APPLICANT

Section: Specific Information Control: H: Upload All Attachment(s) Here

Variance Plan.pdf

Attached to Submission by External User 2020-02-04 11:58 AM SUBMISSION ATTACHMENT VISIBLE TO APPLICANT

Section: Identify Section of Chapter 11-42

Public Notice Plan.pdf

Attached to Submission by Kevin Lyons 2019-05-15 12:17 PM ADDED BY PROCESSOR

Internal Data

PROCESSING DUE DATE 5/30/2019

PUBLIC MEETING DATE 5/23/2019

Status [Refresh](#) [Reset](#)

SUBMITTED

Begin Review

During review the applicant will be locked out of the form.

Print

Download / Export

View Confirmation

Fees [Edit](#)

New Application **\$300.00**

Balance Due **\$300.00** DUE

Download Payment Voucher

Contact Info

Contact
Wastewater Branch
888 SW 1st Ave.
Bldg 1, Suite 432
Portland, OR, 97221

Payment Remittance Address
111 SW 1st St.
Portland, OR 97223

Contacts

Phone
555-555-5555

Fax
444-444-4444

Access

| Name | Access Level |
|--------------|-------------------------|
| Staff User | Submission Editor |
| Thomas Brown | Submission Share Editor |

Event Log

Submission Unlocked - Submission Unlocked
Change Audit - Created
Internal User 2020-02-04 1:53 PM

Submission Locked - Submission Locked
Change Audit - Created
Internal User 2020-02-04 12:00 PM

Submission Unlocked - Submission Unlocked
Change Audit - Created
Internal User 2020-02-04 11:48 AM

[Show 15 More Events](#)

2. Create a Processing Issue by clicking on the Add New button in the Notes & Issues list area.
3. Select Create Processing Issue from the menu.

Create Correction Request

Create Note

Create Processing Issue

4. Populate the details of the Processing Issue, including a title, description and an attachment as appropriate. The user can also select a Standard Text Template (if established in form design) to populate the description. Click Ok to create the processing issue.

The screenshot shows a dialog box titled "Processing Issue for Submission". It contains the following elements:

- Title:** A text input field with a red asterisk indicating it is required.
- Standard Text Templates:** A dropdown menu.
- Description:** A large text area for entering details.
- Attachments:** A dashed border area with the text "Drop files here to upload" and a warning: "Please be aware that files exceeding 30 MB in size are not allowed".
- Buttons:** "Cancel" and "OK" buttons at the bottom right.


5. The Processing Issue will be displayed with the relevant submission, section or control as well as in the summary panel on the right.

Steps to Create Processing Issue from Submission Overview - Form View

To create a processing issue for the submission, perform the following steps:

1. **View Form Questions and Response (Section 7.7)**, if not open already.



2. Create a Processing Issue by clicking on the notation menu icon () for the Submission (in the header), a specific Section (in the section header), or a specific Control (to the right of the control label).
3. Select Create Processing Issue from the menu.

Create Correction Request

Create Note

Create Processing Issue

4. Populate the details of the Processing Issue, including a title, description and an attachment as appropriate. The user can also select a Standard Text Template (if established in form design) to populate the description. Click Ok to create the processing issue.

5. The Processing Issue will be displayed with the relevant submission, section or control as well as in the summary panel on the right.

7.8.2.2 View Processing Issue

Processing issues are notations that signify a issue during processing or a potential concern that needs to be followed-up upon. By nature, processing issues are only visible to internal processors. Processing issues have a workflow component allows for a processor to establish the issue, and for the same, or another processor, to complete the processing issue.

This topics discusses how to view a processing issue.

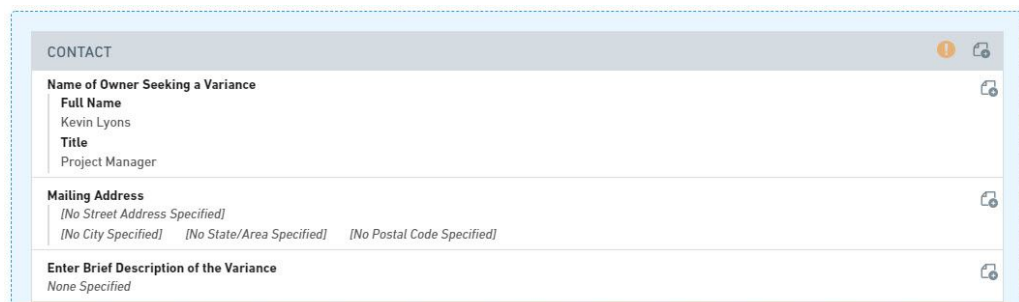
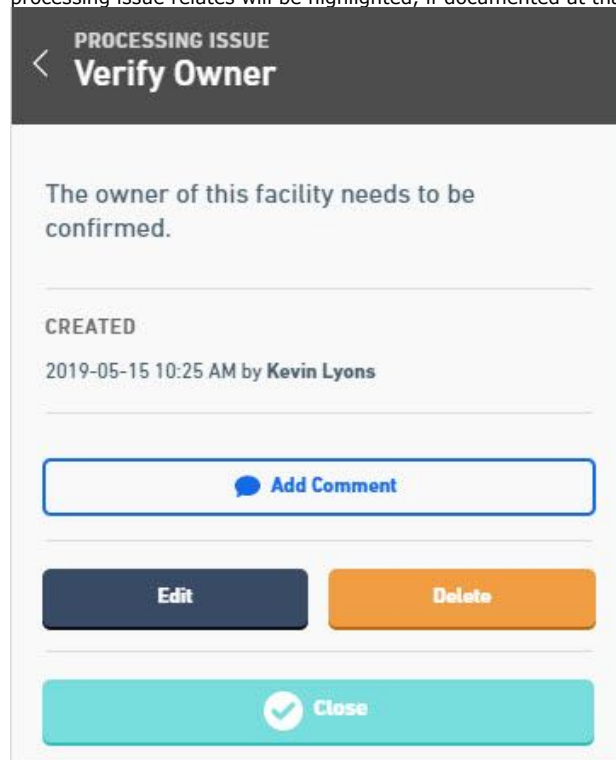
View Processing Issue from Submission Summary

To view a processing issue from the Submission Summary area, follow these steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Find an open processing issue and select it.



3. The details of the processing issue will be presented. The specific section or control for which the processing issue relates will be highlighted, if documented at that level.

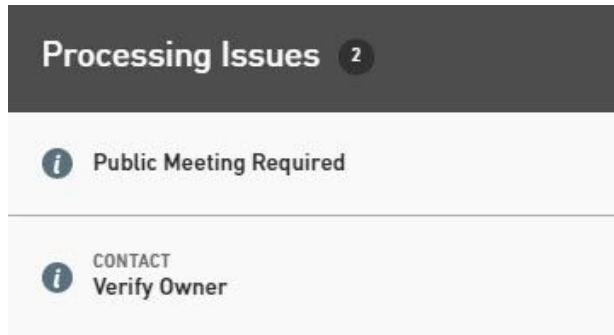


4. Review the processing issue.

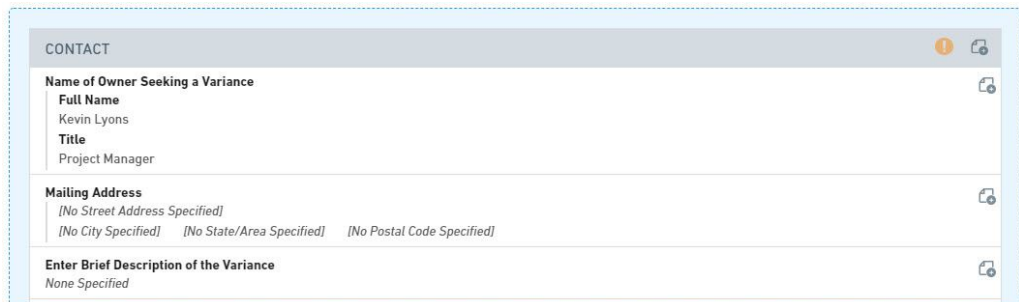
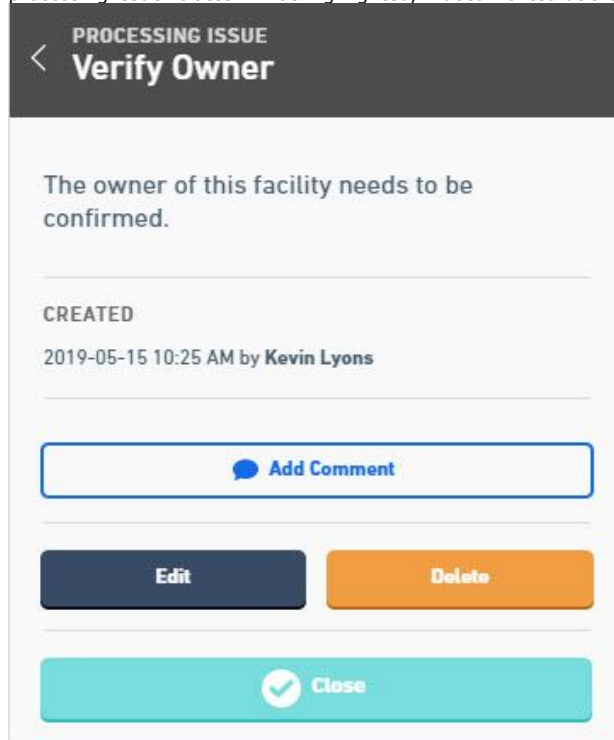
View Processing Issue from Form Questions and Responses

To view a processing issue from the Form Questions and Responses area, follow these steps:

1. **View Form Questions and Response (Section 7.7)**, if not open already.
2. Find an open processing issue on the left and select it.



- The details of the processing issue will be presented. The specific section or control for which the processing issue relates will be highlighted, if documented at that level.



- Review the processing issue.

Variations

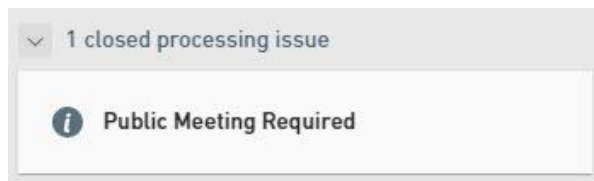
Open Closed Processing Issue:

To open an closed processing issue, perform the following:

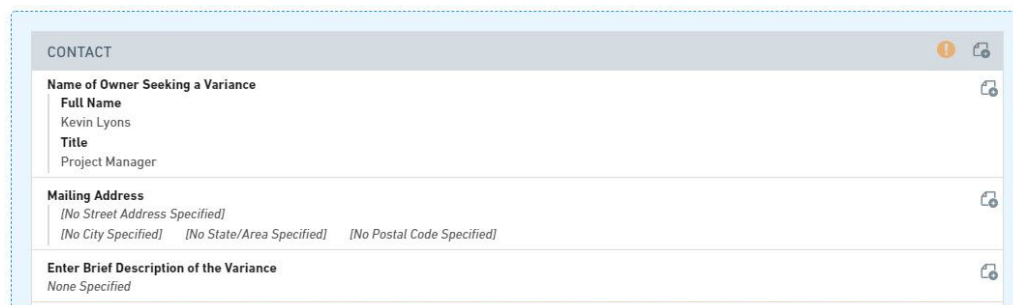
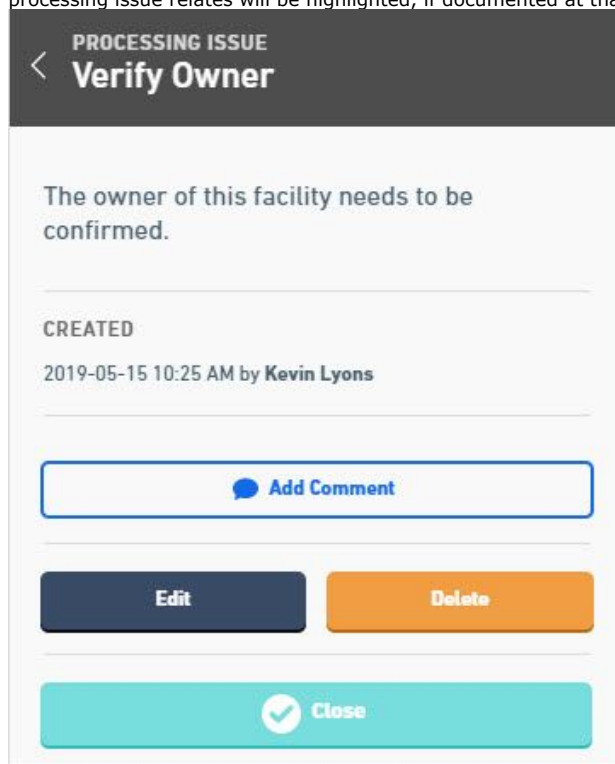
- View Submission Summary (Section 6.5)** or **View Form Questions and Response (Section 7.7)**, if not open already.
- Click on the "N closed processing issue(s)" area on the right panel.



- The list of approved processing issue(s) will be displayed.



4. Find the processing issue in question and select it.
5. The details of the processing issue will be presented. The specific section or control for which the processing issue relates will be highlighted, if documented at that level.



6. Review the processing issue.

7.8.2.3 Close Processing Issue

Processing issues are notations that signify a issue during processing or a potential concern that needs to be followed-up upon. By nature, processing issues are only visible to internal processors. Processing issues have a workflow component allows for a processor to establish the issue, and for the same, or another processor, to complete the processing issue.

This topic discusses how to close a processing issue.

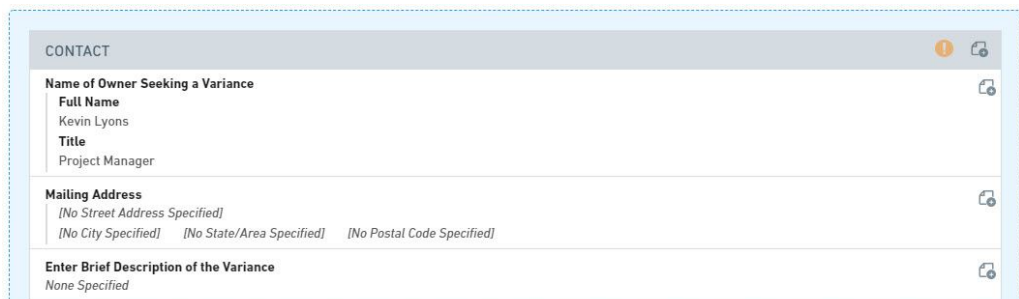
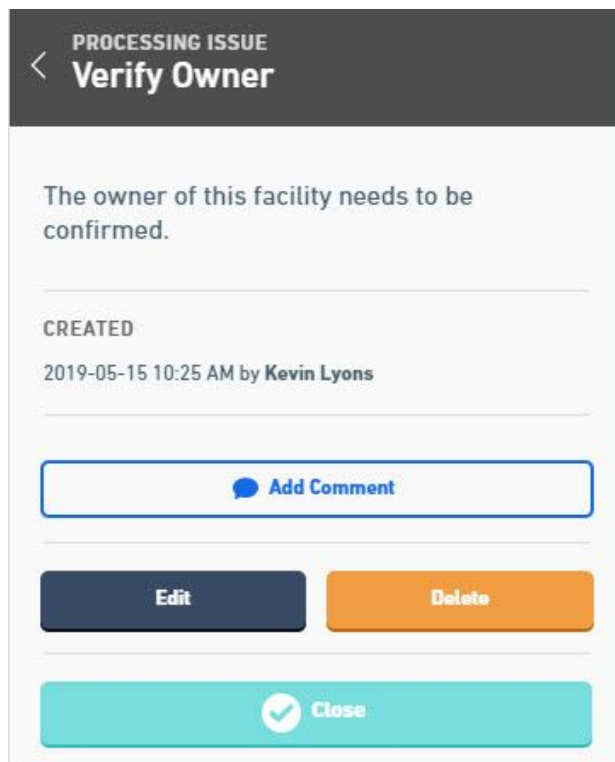
Close Processing Issue from Submission Summary

To close a processing issue from the Submission Summary area, follow these steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Find an open processing issue and select it.



3. The details of the processing issue will be presented. The specific section or control for which the correction request relates will be highlighted, if documented at that level.
4. Review the processing issue and make a determination whether to close the request.

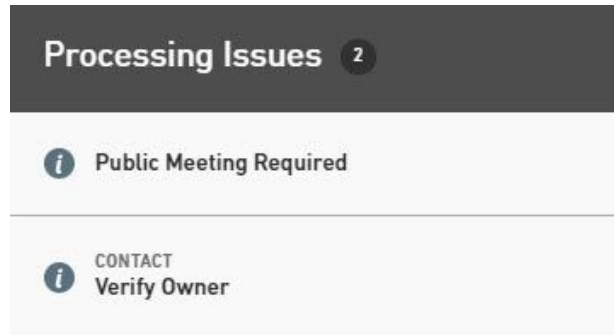


5. Select the Close button to close the processing issue.

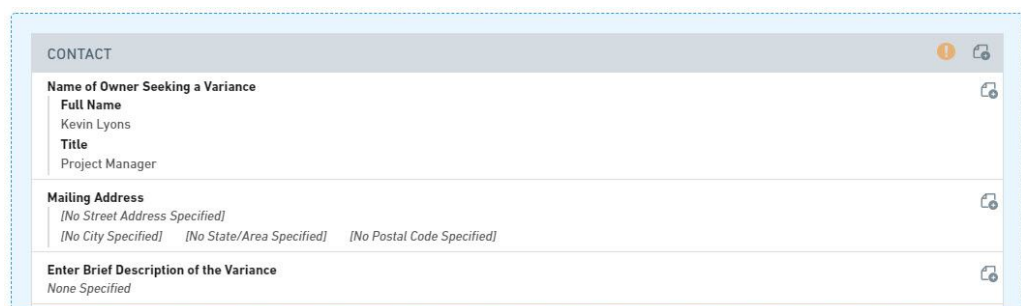
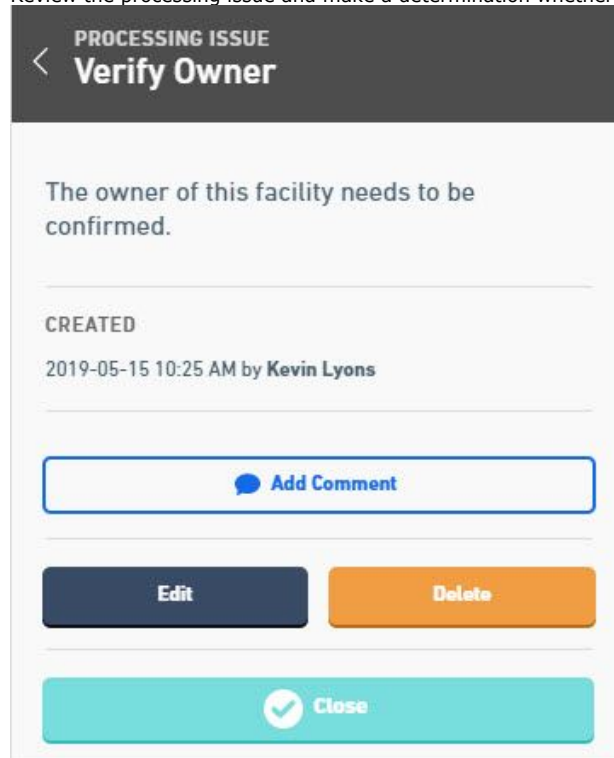
Close Processing Issue from Form Questions and Responses

To close a processing issue from the Form Questions and Responses area, follow these steps:

1. **View Form Questions and Response (Section 7.7)**, if not open already.
2. Find an open processing issue and select it.



3. The details of the processing issue will be presented. The specific section or control for which the correction request relates will be highlighted, if documented at that level.
4. Review the processing issue and make a determination whether to close the request.



5. Select the Close button to close the processing issue.

7.8.3 Note Introduction

Notes are informational messages added to a submission to help guide the submitter or provide supplemental information about the submission. Notes are created by the processor and do not have an associated workflow and do not require the activation of the processing lock. These are typically used to convey helpful information regarding the submission itself, but can be designated as internal only notes as well if information simply needs to be shared within the

agency.

This topic discusses, how to:

- **Create a Note (Section 7.8.3.1)**
- **View a Note (Section 7.8.3.2)**

7.8.3.1 Create Note

Notes are informational messages added to a submission to help guide the submitter or provide supplemental information about the submission. Notes do not have an associated workflow and do not require the activation of the processing lock. These are typically used to convey helpful information regarding the submission itself, but can be designated as internal only notes as well if information simply needs to be shared within the agency.

This topic discusses how to create a note.

Steps to Create Note from Submission Overview - Summary

To create a note for the submission from the Submission Overview Summary, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.

SUBMISSION OVERVIEW

Application for Variance

View Form
A complete view of the submitted form data

Summary

Revisions

Processing

SUBMISSION ALIAS Application for Variance

SUBMITTED 02/04/2020 (0 days ago) by [External User](#)

REFERENCE # —

SUBMISSION ID HNP-NGFR-QQ25X

DESCRIPTION Acme's Application for Variance

SUBMISSION REASON New

PROJECT TYPE(S) —

PROJECT TYPE(S) JUSTIFICATION —

RESPONSIBLE PERSON —

Notes & Issues Add New

ALL (6) CORRECTION REQUEST (2) NOTE (2) PROCESSING ISSUE (2)

CONTACT - MAILING ADDRESS

Correct City/ZIP Code — The ZIP code does not match the city. Please correct. ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:45 PM

Review Client Financial Standing ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:13 PM INTERNAL-ONLY

CONTACT - NAME OF OWNER SEEKING A VARIANCE

Correct Owner — Public records indicate that the owner is currently Sally Way, Ple... ACTION REQUIRED

Added by Kevin Lyons 2019-05-10 1:32 PM

SHOW MORE

Processing View All Manage

2 OF 10 **8 OF 10**

2A Application Review is Completed ...

DUE ON 02/09/2020

[Sina Pruder](#)

2B Applicant is notified of comments ...

DUE ON 02/09/2020

[Sina Pruder](#)

Documents & Attachments Add New

ALL (3) ADDED BY PROCESSOR (1) SUBMISSION ATTACHMENTS (2)

Construction Permit.pdf

Attached to Submission by External User 2020-02-04 11:58 AM SUBMISSION ATTACHMENT VISIBLE TO APPLICANT

Section: Specific Information Control: H Upload All Attachment(s) Here

Variance Plan.pdf

Attached to Submission by External User 2020-02-04 11:58 AM SUBMISSION ATTACHMENT VISIBLE TO APPLICANT

Section: Identify Section of Chapter 11-62

Public Notice Plan.pdf

Attached to Submission by Kevin Lyons 2019-05-15 12:17 PM ADDED BY PROCESSOR

Internal Data

PROCESSING DUE DATE 5/30/2019

PUBLIC MEETING DATE 5/23/2019

Status SUBMITTED Refresh

Begin Review

During review the applicant will be locked out of the form.

Print

Download / Export

View Confirmation

Fees Edit

New Application \$300.00

Balance Due \$300.00 DUE

Download Payment Voucher

Contact Info

Contact
Wastewater Branch
888 SW 1st Ave.
Bldg 1, Suite 432
Portland, OR, 97221

Payment Remittance Address
111 SW 1st St.
Portland, OR 97223

Contacts

Phone
555-555-5555

Fax
444-444-4444

Access

| Name | Access Level |
|--------------|-------------------------|
| Staff User | Submission Editor |
| Thomas Brown | Submission Share Editor |

Event Log

Submission Unlocked - Submission Unlocked
Change Audit - Created
Internal User 2020-02-04 1:53 PM

Submission Locked - Submission Locked
Change Audit - Created
Internal User 2020-02-04 12:00 PM

Submission Unlocked - Submission Unlocked
Change Audit - Created
Internal User 2020-02-04 11:48 AM

Show 15 More Events

2. Create a Note by clicking on the Add New button in the Notes & Issues list area.
3. Select Create Note from the menu.

Create Correction Request

Create Note

Create Processing Issue

4. Populate the details of the Note, including a title, description and an attachment as appropriate. Designate whether the note will be displayed to the submitter. The user can also select a Standard Text Template (if established in form design) to populate the description. Click OK to create the Note.

Note for Submission

Title

*

Standard Text Templates

Description

Note displayed for applicant?

*


Attachments

5. The Note will be displayed with the relevant submission, section or control as well as in the summary panel on the right.

Steps to Create Note from Submission Overview - Form View To create a note for the submission, perform the following steps:

1. **View Form Questions and Response (Section 7.7)**, if not open already.



2. Create a note by clicking on the notation menu icon () for the Submission (in the header), a specific Section (in the section header), or a specific Control (to the right of the control label).
3. Select Create Note from the menu.

Create Correction Request

Create Note

Create Processing Issue

4. Populate the details of the Note, including a title, description and an attachment as appropriate. Designate whether the note will be displayed to the submitter. The user can also select a Standard Text Template (if established in form design) to populate the description. Click OK to create the correction request.

The screenshot shows a form titled "Note for Submission". It contains the following fields and controls:

- Title:** A text input field with a red asterisk indicating it is required.
- Standard Text Templates:** A dropdown menu.
- Description:** A large text area for entering details.
- Note displayed for applicant?:** A dropdown menu with a red asterisk indicating it is required.
- Attachments:** A section with a plus sign icon for adding files.
- Buttons:** "Cancel" and "OK" buttons at the bottom right.

5. The Note will be displayed with the relevant submission, section or control as well as in the summary panel on the right.

7.8.3.2 View Note

Notes are informational messages added to a submission to help guide the submitter or provide supplemental information about the submission. Notes do not have an associated workflow and do not require the activation of the processing lock. These are typically used to convey helpful information regarding the submission itself, but can be designated as internal only notes as well if information simply needs to be shared within the agency.

This topic discusses how to view a note.

View Note from Submission Summary

To view a note from the Submission Summary area, follow these steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down to the Notes & Issues area in the center panel. Click on the **"Note"** filter to display only notes.

Notes & Issues

Add New

ALL (6) CORRECTION REQUEST (2) **NOTE (2)** PROCESSING ISSUE (2)

SPECIFIC INFORMATION > VARIANCE TIME PERIOD REQUEST

Variance Expiration 06/2024 — Your variance will expire in 06/2024.
 Added by **Kevin Lyons** 2019-05-15 11:33 AM

Application Requires Public Notice — This attributes of this application require a public notice be posted. Pleas...
 Added by **Kevin Lyons** 2019-05-10 1:30 PM

3. Find an note and select it.
4. The details of the note will be presented. The specific section or control for which the note relates will be highlighted, if documented at that level.

NOTE
 < **Variance Expiration 06/2024**

Your variance will expire in 06/2024.

CREATED
 2019-05-15 11:33 AM by **Kevin Lyons**

Edit **Delete**

Variance Time Period Request
 5 years

5. Review the note.

View Note from Form Questions and Responses

To view a note from the Form Questions and Responses area, follow these steps:

1. **View Form Questions and Response (Section 7.7)**, if not open already.
2. Find an open note on the left and select it.

Notes 2

Application Requires Public Notice

SPECIFIC INFORMATION > VARIANCE TIME PERIOD REQUEST
Variance Expiration 06/2024

3. The details of the note will be presented. The specific section or control for which the note relates will be highlighted, if documented at that level.

4. Review the note.

7.9 View Attachments

Documents & Attachments are files that can be associated to a submission, either by the submitter or an internal processor during processing.

Attachments can be marked as confidential and, if marked as such, will only be viewable by the submitter and internal users with the appropriate security rights.

This topic describes how to view submission attachments.

View All Submission Attachments

To view all attachments provided by the submitter and internal staff for the submission, perform the following steps from the submission summary page:

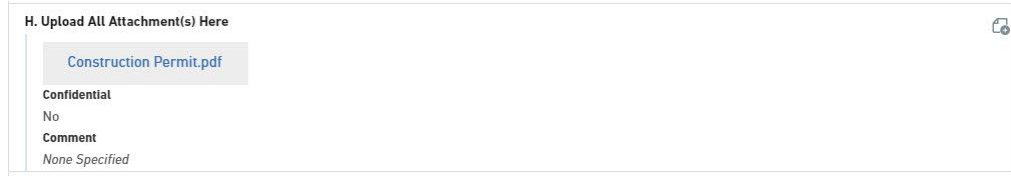
1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down to the **Documents & Attachments** area in the center panel.
3. Associated documents will be displayed.

4. Select the All, System Generated, Added by Processor or Submission Attachments, to filter the list of the documents in different ways.

View Form Question and Response Attachments

To view attachments provided by the submitter on the form questions and responses page, perform the following steps:

1. **View Form Questions and Response (Section 7.7)**, if not open already.
2. Review the form and identify an attachment in question within the form.



3. Click on the document name to download and review the document.

View Notation Attachments

To view attachments associated to notations (e.g., correction requests, processing issues, notes), perform the following steps:

1. Open a (i.e., **correction request (Section 7.8.1.2)**, **processing issue (Section 7.8.2.2)**, **note (Section 7.8.3.2)**), if not already open
2. If an attachment is associated, it will be displayed in the details of the notation on the right.
3. Click on the document name to download and review the document.

7.10 Create Attachments

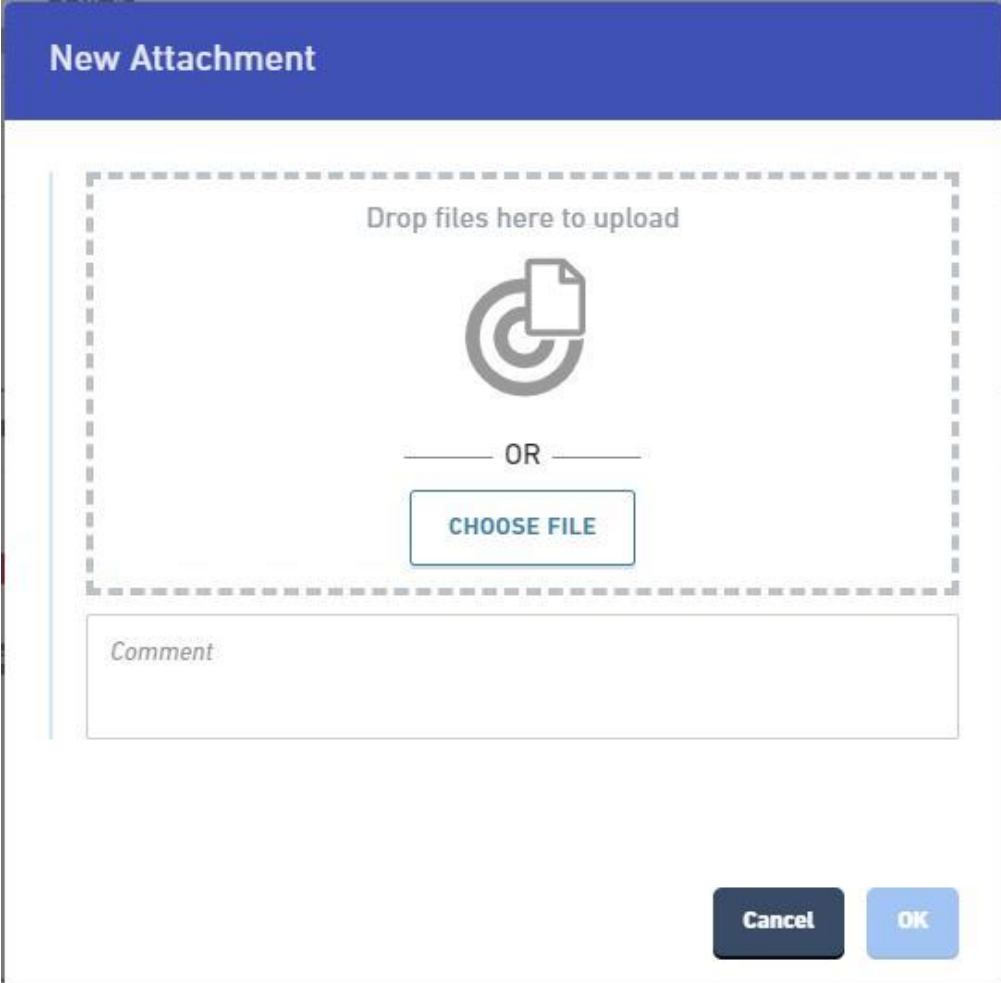
Documents & Attachments are files that can be associated to a submission, either by the submitter or an internal processor during processing.

This topic describes how to create a submission attachments (outside of the form submission wizard).

Add an Attachment to the Submission

To add an attachment to the submission, perform the following:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Select the **Add New** button in the top right hand corner of the list.
3. The New Attachment dialog will be displayed for entering the attributes of an attachment.



4. Drag the desired document in to the **Drop files here to upload area** or select the **Choose File** to browse for the file and select it using the file selection tool. The selected file will be displayed in the dialog.
5. Enter any comments about the attachment that may be relevant.
6. If the file is considered confidential, denote it as such by checking the Confidential checkbox.
7. Click the **OK** button to save the attachment to the submission.
8. The file will be saved and listed in the Documents & Attachments list as Added by Processor.

Variations

Add an Attachment to a Notation:

1. Follow the steps in the create notation (i.e., **correction request (Section 7.8.1.1)**, **processing issue (Section 7.8.2.1)**, **notes (Section 7.8.3.1)**) topics to initiate the creation of a notation.
2. During the notation creation process, add an attachment to the notation and save the notation.
3. The attachment will be saved with the notation and will be viewable with the notations itself as well as in the Documents & Attachments list on the Submission Summary area.

7.11 View Submission Internal Data

Internal data attributes are used to provide additional data (for internal use only) for a submission, providing a means for processors to internally manage a series of attributes for the submission during the processing of the submission. This functionality can be helpful when additional data needs to be collected by internal staff (e.g., processing due date, reserved permit number, etc.) or used to facilitate integrations (e.g., Site ID).

This topic describes how to view the internal data attributes for the submission.

Steps

To view the submission internal data for the submission, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section**

- 6.3) topic, if not already open.
- Navigate down the page to the Internal Data section in the center panel.

Internal Data



- The submissions internal data control attributes will be displayed.

7.12 Populate Submission Internal Data

Internal Data attributes are used to provide additional data (for internal use only) for a submission, providing a means for designers or processors to create a series of attributes for the submission when they are designing the form, or processing a submission that will become part of the submission. This functionality can be helpful when additional data needs to be collected by internal staff or used to facilitate integrations.

Steps:

To populate the submission internal data for the submission, perform the following steps:

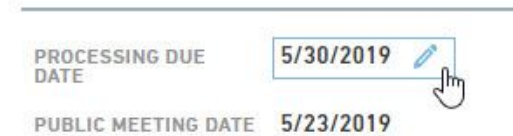
- Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
- Navigate down the page to the Internal Data section in the center panel.

Internal Data



- Hover over and click on the Internal Data attribute value in question to make the field editable.

Internal Data



- The Internal Data attribute will become editable. Enter the information for the internal data attribute.

7.13 Manage Processing Steps

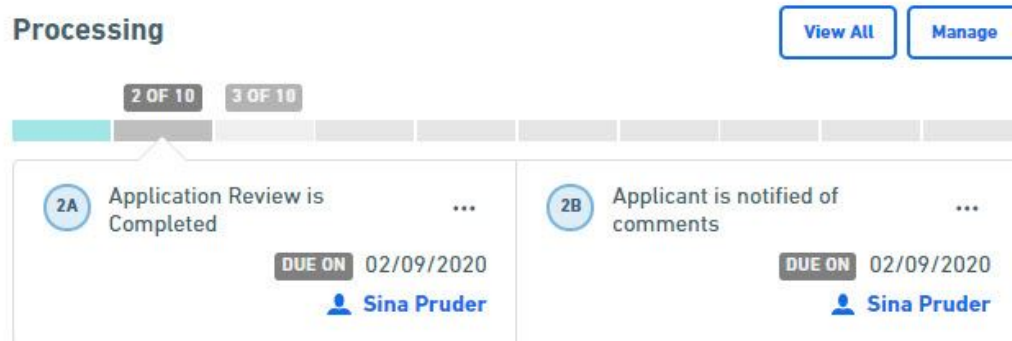
Processing steps allow the agency to view and manage the key tasks/steps that are completed while processing a submission. Each key task is represented as a processing steps. Processing steps can occur in sequence or in parallel of another tasks.

This topic describes how to assign processing steps to staff members and how to mark processing steps as complete.

Steps

To manage the processing steps for the submission, perform the following steps:

- Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
- Navigate to the Processing area of the Summary screen which displays the currently active processing steps, including name, due date and assigned staff..



A user can clicking on the "Processing" link on the left navigation panel to view all processing steps for this submission.

3. Processing options:

- a. To **mark a step as complete**, hover over and mouse click on the relevant step number or mouse click on the "..." ellipse to the right of the relevant step name and select "Mark Complete". Performing this step will:
 - a. Denote the step as complete
 - b. Assign a completed date
 - c. Assigned the completed by person based on who marked the step as complete
 - d. Remove the step from the active steps view.
- b. To **mark a step as incomplete**, hover over and mouse click on the relevant step number or mouse click on the "..." ellipse to the right of the relevant step name and select "Mark Incomplete". Note: The system will ask the user to confirm the incompleteness request. Performing this step will:
 - a. Denote the step as incomplete
 - b. Remove the completed date and assign a due date, if available
 - c. Unassign the step

A completed step can only be marked as incomplete from the view of the full Processing steps.

- c. To **assign/reassign a step**, mouse click on the "..." ellipse to the right of the relevant step name and select "Assign" and select the appropriate user from the pick list.

Only submission processors for the current organization will be available for selection in the assignment dropdown.

- d. If a step is not relevant for the current submission, it can be **deleted** by mouse clicking on the "..." ellipse to the right of the relevant step name and select "Remove Step." The system will ask the user to confirm the deletion.
- e. **Processing steps can be added, edited or moved** within the workflow for a particular submission. Click the "Manage" button at the top of the Processing list to enter the Submission Processing Step design area. See the [Redesign Submission Processing Steps](#) for more details on this topic.

7.14 Complete Submission Review

To facilitate the review process, begin and complete review states are available for the form. Completing the Review will stop the review process and disable the processing lock from the form. The processor will be asked if the submitter should be notified of the unlock and any correction requests.

This topic describes how to complete review to remove the processing lock and allow the submitter to revise the submission (and change correction requests), if needed.

Steps

To complete the submission review, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.

SUBMISSION OVERVIEW
Application for Variance
 ID # HNP-NGFR-0025X REVISION 6 **LOCKED**

View Form
 A complete view of the submitted form data

Summary
 Revisions
 Processing

SUBMISSION ALIAS: Application for Variance
 SUBMITTED: 02/04/2020 (0 days ago) by External User
 REFERENCE #: —
 SUBMISSION ID: HNP-NGFR-0025X
 DESCRIPTION: Acme's Application for Variance
 SUBMISSION REASON: New
 PROJECT TYPE(S): —
 PROJECT TYPE(S) JUSTIFICATION: —
 RESPONSIBLE PERSON: —

Notes & Issues Add New

ALL (6) CORRECTION REQUEST (2) NOTE (2) PROCESSING ISSUE (2)

CONTACT - MAILING ADDRESS
 Correct City/ZIP Code — The ZIP code does not match the city. Please correct.
 Added by Kevin Lyons 2019-05-14 4:45 PM **ACTION REQUIRED**

Review Client Financial Standing
 Added by Kevin Lyons 2019-05-14 4:13 PM **INTERNAL-ONLY** **ACTION REQUIRED**

CONTACT - NAME OF OWNER SEEKING A VARIANCE
 Correct Owner — Public records indicate that the owner is currently Sally Way. Ple...
 Added by Kevin Lyons 2019-05-10 1:32 PM **ACTION REQUIRED**

Status
 SUBMITTED

Complete Review
 Completion will reinstate access to the applicant.

Print
 Download / Export
 View Confirmation

Fees

New Application \$300.00
 Balance Due \$300.00 **DUE**

Download Payment Voucher

2. Click on the **Complete Review** button.

Complete Review
 Completion will reinstate access to the applicant.

3. If correction requests are active, the user will be prompted to confirm the processing lock removal and to specify whether the user will be notified that the processing lock was removal and provides a list of any active correction requests.

Disable Processing Lock

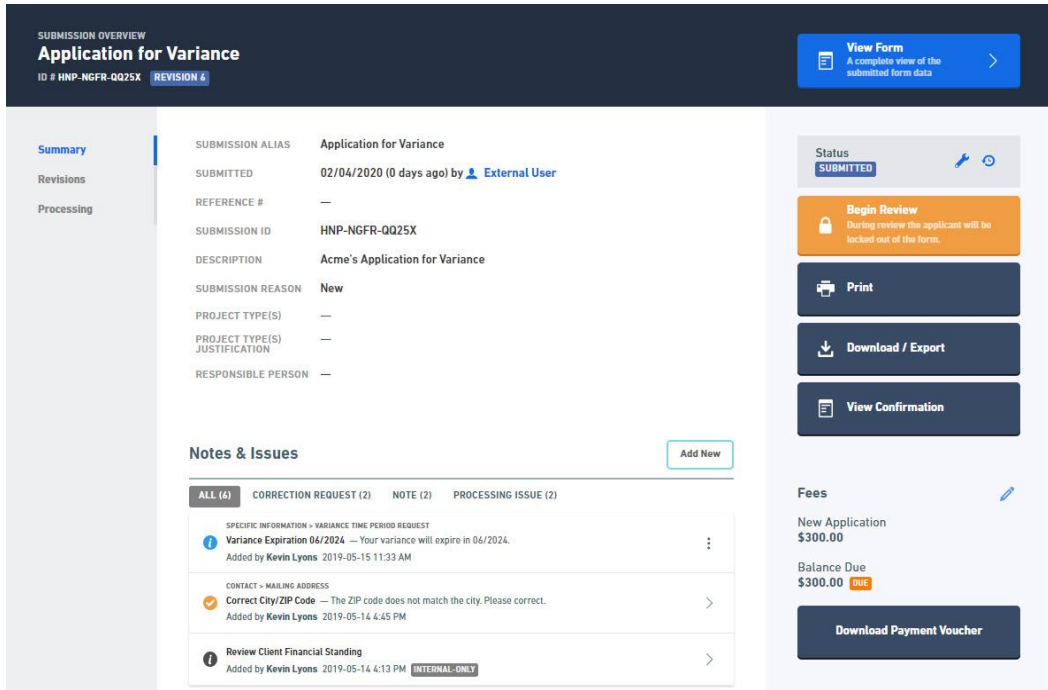
Completing the review will unlock the form and allow the user to revise and fix any requested corrections.

* Notify (via email) applicant(s) that their submission has been unlocked?

Send Email
 Do Not Send Email

Cancel Unlock

4. The processing lock will be disabled on the submission to allow the submitter to revise the submission, if needed, and the user will be notified, if requested by the processor.



7.15 Print Submission

Users have the ability to print a submission on paper. When printing the submission, the user will have the ability to select the contents (e.g., notes, history, internal data, etc.) that will be included in the submission. This topic describes how to print the submission.

Steps

To print the submission, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.

SUBMISSION OVERVIEW
View Form
A complete view of the submitted form data

Application for Variance

ID # HNP-NGFR-QQ25X REVISION 4

Summary

Revisions

Processing

SUBMISSION ALIAS Application for Variance

SUBMITTED 02/04/2020 (0 days ago) by External User

REFERENCE # —

SUBMISSION ID HNP-NGFR-QQ25X

DESCRIPTION Acme's Application for Variance

SUBMISSION REASON New

PROJECT TYPE(S) —

PROJECT TYPE(S) JUSTIFICATION —

RESPONSIBLE PERSON —

Notes & Issues Add New

ALL (4) CORRECTION REQUEST (2) NOTE (2) PROCESSING ISSUE (2)

CONTACT - MAILING ADDRESS

? **Correct City/ZIP Code** — The ZIP code does not match the city. Please correct. ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:45 PM

i **Review Client Financial Standing** ACTION REQUIRED

Added by Kevin Lyons 2019-05-14 4:13 PM INTERNAL-ONLY

CONTACT - NAME OF OWNER SEEKING A VARIANCE

? **Correct Owner** — Public records indicate that the owner is currently Sally Way, Pl... ACTION REQUIRED

Added by Kevin Lyons 2019-05-10 1:32 PM

SHOW MORE

Processing View All Manage

2 OF 10
8 OF 10

2A Application Review is Completed ...

DUE ON 02/09/2020

Sina Pruder

2B Applicant is notified of comments ...

DUE ON 02/09/2020

Sina Pruder

Status SUBMITTED 🔧 ⌛

Begin Review

During review the applicant will be locked out of the form.

Print

Download / Export

View Confirmation

Fees ✎

New Application \$300.00

Balance Due \$300.00 DUE

Download Payment Voucher

Contact Info

Contact
Wastewater Branch
888 SW 1st Ave.
Bldg 1, Suite 432
Portland, OR, 97221

Payment Remittance Address
111 SW 1st St.
Portland, OR 97223

Contacts

Phone
555-555-5555

Fax
444-444-4444

Access

| Name | Access Level |
|--------------|-------------------------|
| Staff User | Submission Editor |
| Thomas Brown | Submission Share Editor |

Event Log

Submission Unlocked - Submission Unlocked
Change Audit - Created
Internal User 2020-02-04 1:53 PM

Submission Locked - Submission Locked
Change Audit - Created
Internal User 2020-02-04 12:00 PM

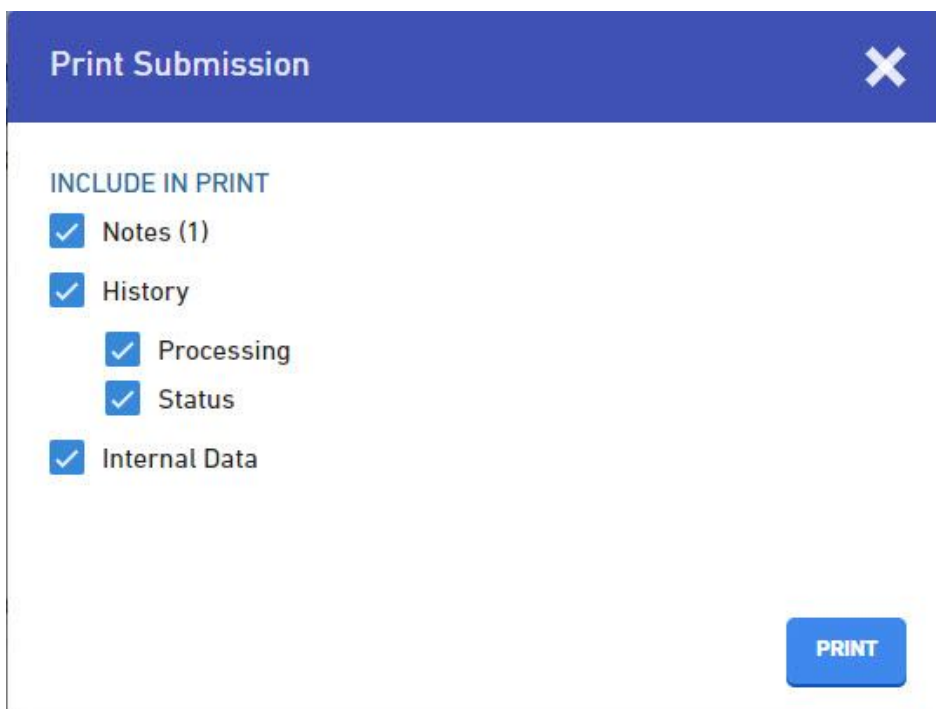
Submission Unlocked - Submission Unlocked
Change Audit - Created
Internal User 2020-02-04 11:48 AM

Show 15 More Events

2. Select the **Print** button.

Print

3. The Print Submission dialog will be presented. Select the content to be included in the print output and click the **Print** button.



4. The browser's native print dialog will be activated, allowing the user to establish the print settings and send the job to the printer.

7.16 Download Submission

Users have the ability to download a submission and its related artifacts. Users have the ability to download the submission contents, as they currently exist, or the Copy of Record which includes the contents in the state they exist when submitted by the submitter. The Copy of Record is a legal document representing the original submission. When downloading the submission, the user will have the ability to select the content that will be included in the downloaded package, including a PDF version of the submission as well as any non-confidential attachments.

This topic describes how to download the submission and copy of record.

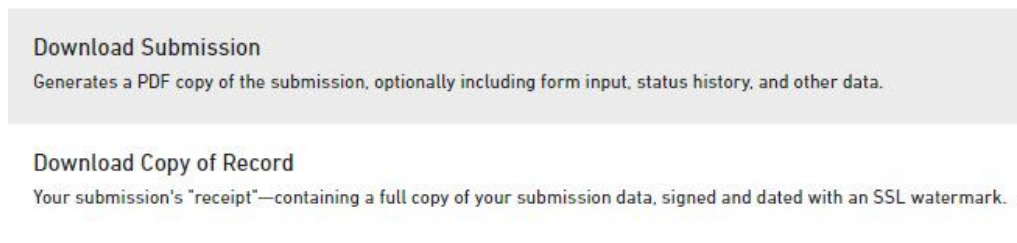
Download Submission

To download the submission and its associated artifacts, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Select the **Download / Export** button.



3. Select the **Download Submission** option.



4. The Download Submission dialog will be presented. Select the content to be included in the download output and click the **Generate PDF** button.

Download Submission
✕

INCLUDE IN GENERATED PDF

- Table of Contents
- Correction Requests (2)
- Notes (2)
- Processing Issues (2)
- History
 - Audit
 - Processing
 - Revision History
 - Status
- Internal Data

ATTACHMENTS

- Download Attachments

GENERATE PDF

5. The browser's native download dialog will appear and prompt the user to download the submission PDF and any available attachments (as a ZIP file).

Download Copy of Record

To download the submission copy of record (as it was originally submitted), perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Select the **Download / Export** button.



3. Select the **Download Copy of Record** option.

Download Submission
Generates a PDF copy of the submission, optionally including form input, status history, and other data.

Download Copy of Record
Your submission's "receipt"—containing a full copy of your submission data, signed and dated with an SSL watermark.

4. The browser's native download dialog will appear and prompt the user to download the submission PDF and any available attachments (as a ZIP file). A digital signature stamp will show in the upper right-hand corner of the document as a part of the digital signature for the document.



7.17 Submission Confirmation

The internal staff members can open the Confirmation (and Payment) page for the submission to review the confirmation the submitter can see, and the payment balance, if applicable.

This topic describes how to open the confirmation page.

Steps:

To open the Submission Confirmation page, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Select the **View Confirmation** button.



3. The submission confirmation will be presented to the user.

Submission Received

Application for Variance AWAITING PAYMENT

01/31/2020 Submission HNX-6GE6-8MX8T Revision 1 Form Version 7.4

Your submission was successfully submitted. It is recommended that you print and retain a copy of your submission receipt for this transaction using the [Print Confirmation](#) feature.

Payment Required to Complete Submission

Please send the remittance to either address.

Submission Fees

| | |
|---------------------------|----------|
| <u>New Application</u> | \$300.00 |
| Total Due \$300.00 | |

Pay OnlinePay by Mail

No thanks, I'll pay later.

4. To return the calling page, click the **No thanks, I'll pay later** link and then the **View Submission** button.


7.18 View Submission Status History

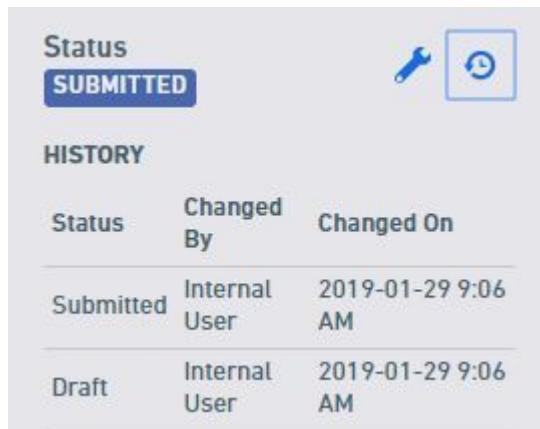
Submissions follow a processing lifecycle. The current state of a submission in that lifecycle is tracked via a submission status. For each status change a submission receives, a history record is logged. Status history is used for tracking the lifecycle over time. The status history reflects who, when and what status is assigned to the submission.

This topic discusses how to view the status history log.


Steps:

To open the Submission View Status History, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Select the **Status History** button () in the status area.
3. The status history will be displayed.



| Status | Changed By | Changed On |
|-----------|---------------|--------------------|
| Submitted | Internal User | 2019-01-29 9:06 AM |
| Draft | Internal User | 2019-01-29 9:06 AM |

 See **Change Submission Status (Section 7.5)** topic for details on how to change the status.

7.19 View and Compare Revisions

Each refined version of the form that is submitted to the agency is contained and packaged as a submission "revision". This approach allows all changes to be reviewed, certified and formally submitted by the submitter in addition to allowing all changes to be tracked over time. Prior versions of the submission can be reviewed, when needed, and versions can be compared, side-by-side.

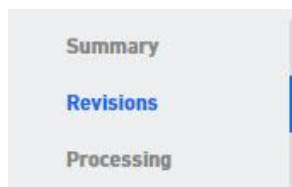
This topic describes how to find and view prior version of a submission and how to compare two different version of a submission.


View Another Revision of the Submission

To view and open another revision for the submission, follow these steps:

Steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Click on the **Revisions** link on the left navigation panel.




 The Revisions list is only displayed if revisions exist.

3. The list of revisions will appear.

| Revisions | | Compare |
|----------------------|------------|-------------------------|
| Revision 2 (viewing) | 05/14/2019 | |
| Revision 1 | 05/10/2019 | VIEW |

4. Select the view button ([VIEW](#)) to open another revision.
5. The Submission Overview page will be presented for the selected version of the submission.

 Many features will be disabled for prior revisions of a submission.

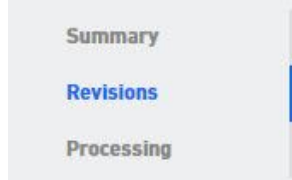
Compare Submission to Previous Version


This section of the system allows you to view the differences between two versions of the submission. The submission version can be seen in the Submission Version Panel in the bottom left corner of the screen. If two or more versions exist you can use the compare feature to determine what has been added, changed or removed.

To compare the differences between two revisions for a submission, follow these steps:

Steps

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Click on the **Revisions** link on the left navigation panel.



 The Revisions list is only displayed if revisions exist.

3. The list of revisions will appear.

| Revisions | | Compare |
|----------------------|------------|-------------------------|
| Revision 2 (viewing) | 05/14/2019 | |
| Revision 1 | 05/10/2019 | VIEW |

4. Click the **Compare** button ([Compare](#)) at the top of the revision list.
5. Select the two versions you wish to compare in the Version A and Version B drop-down lists.

| | |
|--|---|
| <p>Version A View</p> <p>Submission (v1 - REVISED) ▼</p> | <p>Version B View</p> <p>Submission (v2 - INREVIEW) ▼</p> |
|--|---|

5. The differences between the two versions will be displayed in the Difference between A and B panel. Information that was added will be highlighted in yellow and underlined. Information that was removed will have strikethrough over removed text.

Contact

Name of Owner Seeking a Variance
 Name Kevin Jimi Lyons Hendrix
 Title Project Manager Owner

7.20 View Submission Financials

Users have the ability to view the fees assessed, payments received, adjustments applied, fees due and payment status.

This topic discusses how to view the submission financial information.

Steps:

To view fees, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down the page to the Fees area, in the right panel.

3. A summary of the fees is displayed.


Fees

New Application
\$300.00

Payments/Adjustments
-\$200.00

Balance Due
\$100.00 **DUE**

Download Payment Voucher

 See **Download Payment Voucher (Section 7.21)** topic for details on how to download the payment voucher.

7.21 Download Payment Voucher

Users have the ability to view the fees assessed, payments received, adjustments applied, fees due and payment status.

This topic discusses how to view the fees.

Steps:

To view fees, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down the page to the Fees area, in the right panel.
3. A summary of the fees is displayed.

Fees

New Application
\$300.00

Payments/Adjustments
-\$200.00

Balance Due
\$100.00 **DUE**

Download Payment Voucher

4. Select the Download Payment Voucher button.

5. The browser's native download dialog will appear and prompt the user to download the document.


7.22 Manage Financials

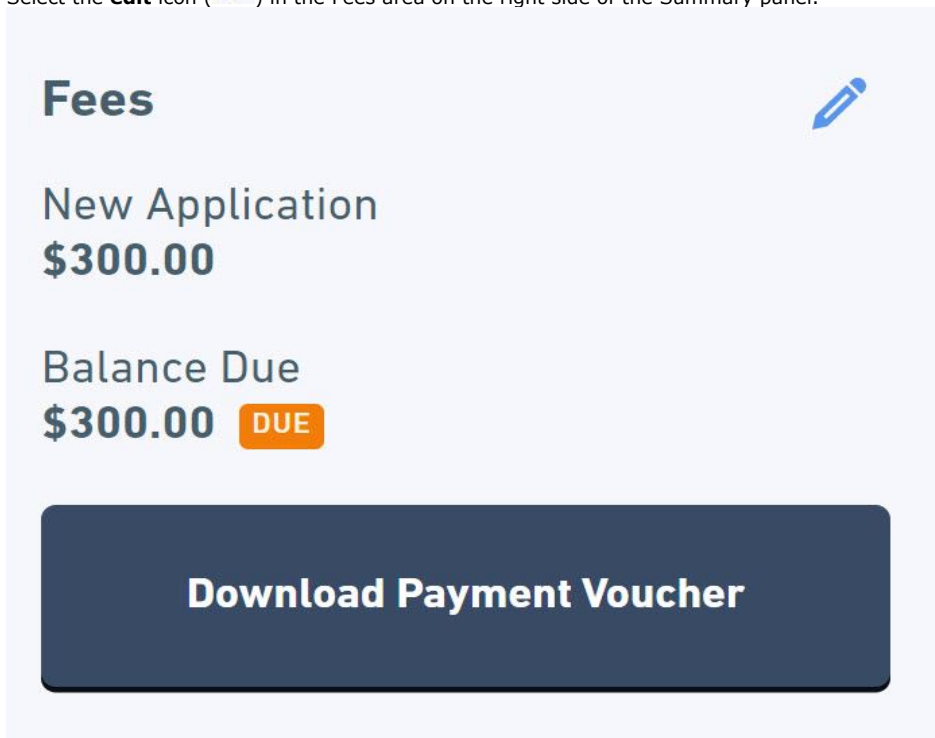
Internal users, with the appropriate rights have the ability to view the submission financial information, such as fee assessed, online payments received, other payments/adjustments applied, amount due and the financial status, are available for viewing and management.

This topic describes how to manage and change the submission financials.

Steps

To manage the fees for the submission, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Select the **edit** icon () in the Fees area on the right side of the Summary panel.



3. The Edit Payment dialog will be presented to the user.

Edit Fees
✕

Fee Category

New Application ▾

Fee Assessed
\$300.00

Online Payments
\$0.00

Adjustments

\$0.00

Amount Due
\$300.00

Fee Status

Due ▾

Cancel

Save

4. Review and adjust the values, as appropriate. Attributes include:
 - a. **Fee Category** is the category of fee to assess (e.g., new vs renewal or small quantity generator vs large quantity generator, etc.) and can be adjusted based on the values configured for the form.
 - b. **Fees Assessed** represents the amount of the fee. This value is assessed based on the selected fee category and/or the value calculated based on properties on the form.
 - c. **Online Payments** displays the amount the submitter paid using the online payment processor.
 - d. **Other Payments/Adjustments** is used to record any payments received (enter as a negative value) or adjustments made (negative values lower the fee, positive values raise the fee).
 - e. **Amount Due** is the amount outstanding based on the values above.
 - f. **Financial Status** is the current status of the financials.
5. Click **OK** to save the changes

7.23 View Contact Information

Users have the ability to view the contacts methods (e.g., email addresses, phone numbers, addresses, etc.) for the submission.

This topic describes how to view the contact methods.

Steps:

To view contact information, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down the page to the Contact Info area, in the right panel.
3. A summary of the Contact Info is displayed.

Contact Info

Contact
Wastewater Branch
888 SW 1st Ave.
Bldg 1, Suite 432
Portland, OR, 97221

Payment Remittance Address
111 SW 1st St.
Portland, OR 97223

Contacts

Phone
555-555-5555

Fax
444-444-4444

7.24 View Users with Access to Submission

Users can be given access to enter data in the submission. Users can be provided with access to enter data on the submission and elevated user rights can be provided to add/remove users who have access to the submission.

This topic describes how to view the users who have access to work on the submission (excluding the current user) and their level of access.

Steps:

To view users with access to work on the submission (excluding the current user), perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down the page to the Access area, in the right panel.
3. A list of the users with access to the submission (excluding the current user) is displayed.

| Access | |
|-------------|------------------------|
| Name | Access Level |
| Kevin Lyons | Submission Editor |
| Tom Brown | Submission Contributor |

7.25 View Submission Event Log

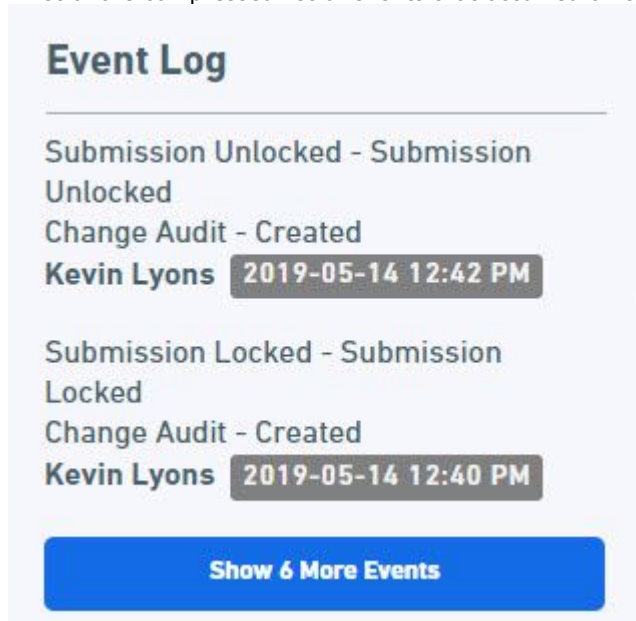
A user can view the log of key events occurring on the submission.

This topic describes how to view the log of events that have occurred upon the submission.

Steps:

To view the log of events, perform the following steps:


1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down the page to the Event Log area, in the right panel.
3. A list of the compressed list of events that occurred on the submission is displayed.



4. Click the **Show N More Events** button to display all events.

7.26 Manage Submission Information

The high-level submission information (e.g., Reference #, Description, Form Type, etc.) can be edited/refined for a submission.

 Each submission can have a responsible person assigned to the submissions. This is intended to represent the person that is responsible for monitoring and managing the processing of the submission, as a whole. Note: The label for this field may display with a unique label (e.g., Responsible Person, Permit Writer, etc.), based on an agencies unique configuration.

This topic describes how to manage and change the submission identification information.

Steps

To update the submission information, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate to the high-level submission information section at the top of the center panel.

SUBMISSION OVERVIEW

Application for Variance

ID # HNP-NGFR-QQ25X REVISION 7 LOCKED

| | | |
|------------|-------------------------------|---|
| Summary | SUBMISSION ALIAS | Application for Variance |
| Revisions | SUBMITTED | 02/04/2020 (0 days ago) by External User |
| Processing | REFERENCE # | — |
| | SUBMISSION ID | HNP-NGFR-QQ25X |
| | DESCRIPTION | Acme's Application for Variance |
| | SUBMISSION REASON | New |
| | PROJECT TYPE(S) | — |
| | PROJECT TYPE(S) JUSTIFICATION | — |
| | RESPONSIBLE PERSON | — |

3. Hover over and click on an editable submission information attribute value (e.g., Description, Submission Reason, Responsible Person, etc.) in question to make the field editable.

| | |
|-------------------------------|---|
| SUBMISSION ALIAS | Application for Variance |
| SUBMITTED | 02/04/2020 (0 days ago) by External User |
| REFERENCE # | — |
| SUBMISSION ID | HNP-NGFR-QQ25X |
| DESCRIPTION | Acme's Application for Variance |
| SUBMISSION REASON | New |
| PROJECT TYPE(S) | — |
| PROJECT TYPE(S) JUSTIFICATION | — |
| RESPONSIBLE PERSON | — |

4. The submission information attribute will become editable. Enter the information for the submission information attribute.

7.27 Email Submitter

Users have the ability to email the submitter about the submission and communicate any pertinent information, as appropriate.

This topic describes how to email the submitter.

Steps

To email the submitter, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate to the high-level submission information section at the top of the center panel.

SUBMISSION OVERVIEW

Application for Variance

ID # HNP-NGFR-QQ25X REVISION 7 LOCKED

Summary

Revisions

Processing

| | |
|--------------------------------------|---|
| SUBMISSION ALIAS | Application for Variance |
| SUBMITTED | 02/04/2020 (0 days ago) by External User |
| REFERENCE # | — |
| SUBMISSION ID | HNP-NGFR-QQ25X |
| DESCRIPTION | Acme's Application for Variance |
| SUBMISSION REASON | New |
| PROJECT TYPE(S) | — |
| PROJECT TYPE(S) JUSTIFICATION | — |
| RESPONSIBLE PERSON | — |

3. Hover over and click on the Submitters name to activate a pick list.

| | |
|-------------------------|--|
| SUBMISSION ALIAS | Application for Variance |
| SUBMITTED | 02/04/2020 (0 days ago) by External User ... |
| REFERENCE # | — |
| SUBMISSION ID | HNP-NGFR-QQ25X |

4. Select the **Email User** option from the pick list.

Email User

5. Select the messages(s) to be sent, from the Email External User dialog and select **Email User** button.

Email External User
✕

Select the messages below to email to the applicant:

Variance Expiration 06/2024
 Your variance will expire in 06/2024.
Note added by Kevin Lyons 2019-05-15 11:33 AM

Correct City/ZIP Code
 The ZIP code does not match the city. Please correct.
Correction Request added by Kevin Lyons 2019-05-14 4:45 PM

Correct Owner
 Public records indicate that the owner is currently Sally Way. Please correct this information on the application or provide proof of ownership change.
Correction Request added by Kevin Lyons 2019-05-10 1:32 PM

Application Requires Public Notice
 This attributes of this application require a public notice be posted. Please submit written notice to all local news publications.
Note added by Kevin Lyons 2019-05-10 1:30 PM

Email User

Copy To Clipboard

Cancel

- 6. An email will be opened in the systems default email client including the selected notes.

Variations

Copy Contents to Clipboard

- If no default email client is set up, or if the user wishes to copy the content of notes, they can utilize the copy to clipboard function by selecting the **Copy To Clipboard** button (if the user's browser supports this feature). This feature will copy the notes contents to the clipboard so it can be pasted into another program such as notepad or word.

7.28 View Active Processing Steps

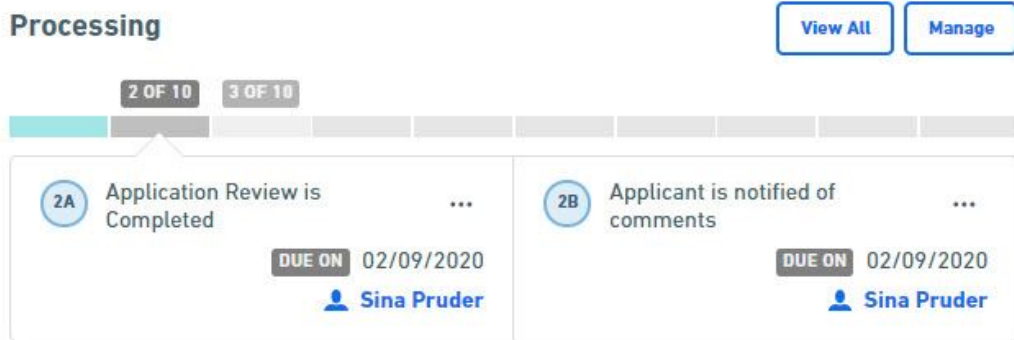
Processing steps allow the agency to view and manage the key tasks/steps that are completed while processing a submission. Each key task is represented as a processing steps. Processing steps can occur in sequence or in parallel of another tasks.

The active (next available) processing steps are display to the processor on the Submission Summary page. These active steps are a part of a [larger workflow](#) that is available for the submission. This topic describes how to navigate to and view the active processing steps.

Steps

To view the active processing steps for the submission, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Navigate down the page to the Processing section in the center panel.



3. The submission's active processing steps will be displayed.

7.29 View Processing Workflow

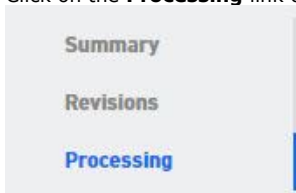
Internal staff have the ability to view the full processing workflow for the submission. This includes each step in the process and their dependencies to one another.

This topic describes how to open the workflow processing steps area of the submission for viewing.

Steps

To open the submission processing workflow page, perform the following steps:

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Click on the **Processing** link on the left navigation panel.



3. The processing steps for the submission will be displayed.

SUBMISSION OVERVIEW

Application for Variance

ID # HNP-NGFR-0025X REVISION 6

View Form
A complete view of the submitted form data

Summary

Revisions

Processing

Processing Manage

| | | |
|----|---|---|
| 1 | ✔ Application Submitted | COMPLETED 02/04/2020 Demo User |
| 2 | 2A Application Review is Completed ... <div style="display: flex; justify-content: space-between; font-size: 0.7em;"> DUE ON 02/09/2020 Sina Pruder </div> | 2B Applicant is notified of comments ... <div style="display: flex; justify-content: space-between; font-size: 0.7em;"> DUE ON 02/09/2020 Sina Pruder </div> |
| 3 | 3 Draft Public Notice for Variance ... Sina Pruder | |
| 4 | 4 Mail Public Notice to Applicant ... Sina Pruder | |
| 5 | 5A Solicit Comments to other Agencies ... Sina Pruder | 5B Verify Receipt of Public Notice Affidavit ... Sina Pruder |
| 6 | 6 Confirm receipt of all comments from other Agencies ... Sina Pruder | |
| 7 | 7 Draft Variance Decision ... Sina Pruder | |
| 8 | 8 Mail Draft Decision to Applicant ... Sina Pruder | |
| 9 | 9 Draft Final Variance Decision ... Sina Pruder | |
| 10 | 10 Issue Final Variance Decision to Applicant ... Sina Pruder | |


7.30 Redesign Submission Processing Workflow

Processing steps allow the agency to view and manage the key tasks/steps that are completed while processing a submission. Each key task is represented as a processing steps. Processing steps can occur in sequence or in parallel of another tasks.

This topic describes how to change the design for a submissions processing step workflow, when appropriate to fit the needs of a specific submission.

Steps:


1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. To open the processing step design area, use one of these two options:


- a. Navigate down the page to the Processing list section and select the **Manage** button ().
- b. Click on the Processing link in the top left panel and navigate down the page to the Processing list

section and select the **Manage** button ().

Default nForm Agency Users Guide

3. Steps that have been completed will be highlighted with a green background; pending steps will show with the standard white background.
4. If a new processing step needs to be added, click the **Add Step** link at the top right of the processing steps list

and got to step 7. If an existing processing step needs to be edited, click the Edit icon () to the right of the step in question and go to step 7.

5. Provide the properties of the processing step:
 - a. **Step Name:** Enter the Step Name of the processing step as it will appear in the process and in any notifications.
 - b. **Target Completion NN Days After Previous Step Completed:** Provide the number of calendar days after the previous step DOH is targeted complete this step to allow the system to calculate the target completion date for this step.
 - c. **Default Assignment:** If appropriate, select the internal e-Portal user who will be assigned as the responsible staff person for this step, by default.
 - d. **Suppress Step from View for External Users:** If checked, the submitter will not be allowed to view this step.
6. Click the **OK** button to continue. If an error is presented, resolve the issue and click the **OK** button to continue. Repeat step as necessary.
7. Adjust the order of the processing steps by clicking on a processing step and dragging it up or down to a new position.
8. Click the **Step Action** icon () to the right of the processing step in question to enter the area which will allow you to view the step actions. See the **Step Actions** section within the **Manage a Form** topic for more

- details on configuring step actions.
- 9. Click on the **Done** button at the bottom right to complete the editing process.



7.31 Inject Processing Workflow Template into a Submission

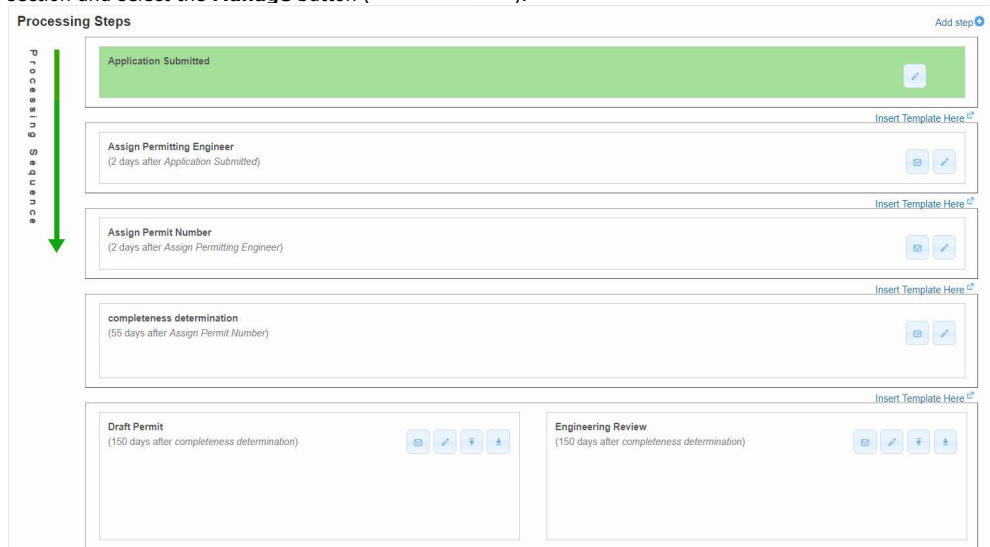
Predefined workflow templates can be used to inject workflow processing steps into a process based on an standardized template.

This topic describes how to inject these steps in to an existing form or form submission.

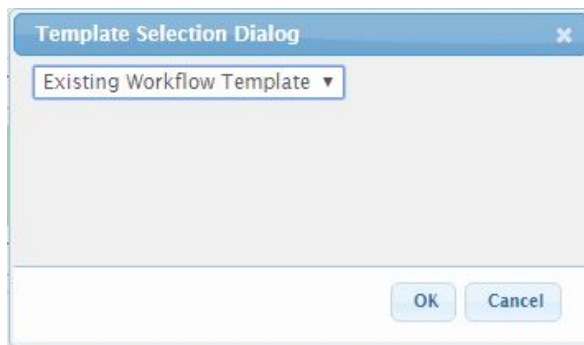
Steps:


1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. To open the processing step design area, use one of these two options:

- a. Navigate down the page to the Processing list section and select the **Manage** button ().
- b. Click on the Processing link in the top left panel and navigate down the page to the Processing list section and select the **Manage** button ().



3. Click the **Insert Template Here** link at the appropriate location (e.g., the spot where steps are to be added).
4. The Template Selection Dialog dropdown box will display allowing user to choose a template to insert.



 The Template Selection Dialog dropdown will only list templates available for the forms current organization.

5. Click the **OK** button and confirm the step insertion. The steps from the selected template will be added to the processing steps list, in the selected location.

7.32 Send Submission Data to Other System

Select users have the ability to reactivate the automated process to send data to another system, when necessary. This is most commonly used if the original shipment failed.

Default nForm Agency Users Guide

This topic describes how to reactivate the process to send data to another system.

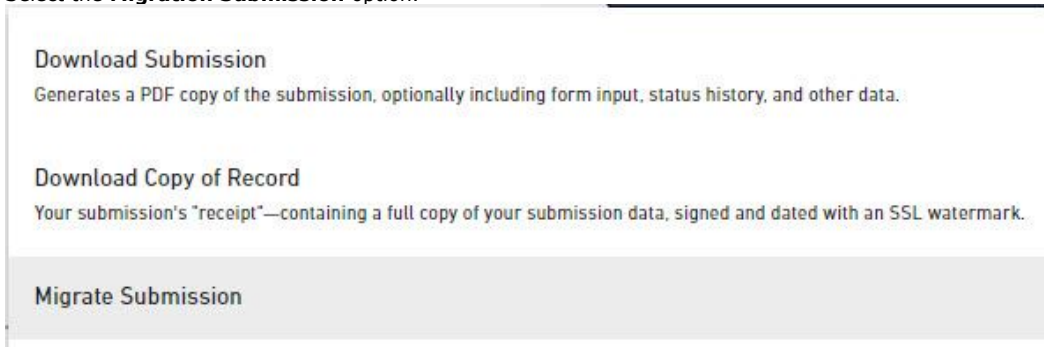
Steps

The following steps can be used to reactivate the process to send data to another system.

1. Open the Submission Overview form using the steps described in the **View a Submission (Section 6.3)** topic, if not already open.
2. Select the **Download / Export** button.



3. Select the **Migration Submission** option.



8 Reporting

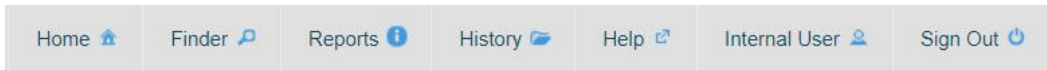
View Online Payment Transaction Report (Section 8.1): The details of how to run and interpret the Online Payment Transaction report.

8.1 View Online Payment Transaction Report

The online transaction summary is a tool for tracking all payments made online towards any applicable fees. The default report date parameters will be set to the previous month and the organization filter will default to the highest organization level you have access to.

Steps:

1. Sign in to the system.
2. Click the **Reports** link from the top menu.



3. Select the desired organization and date range. Submission # and Payer are also available.


Online Payment Transaction Report

The transaction summary report is used to review and print online payment transactions for the selected organization. To run the report, you must first select the Organization you wish to review transactions for, and then select the start and end date for the desired activity period.

Environmental Health Administration Select Organization ▾

Activity Between: * 3/1/2018 and * 3/31/2018

Submission #: Payer: Go

4. Click the **Go** button ()
5. Results will be displayed grouped by organization and form.

Environmental Health Administration, between 03/01/2018 and 03/31/2018 Print

2 Catherine's Fun House Forms

Kevin's Calculated Fee Test (Online) (v1.0)

| Submission # | Account # | Transaction Id | State | Payment Date | Payer | Email | Amount |
|--|--------------------------|-------------------|-----------|--------------|-------|----------------------|----------|
| HNC-EKW3-77ER5 | 1111-2222-3333-4444-5555 | 83G477868G037829P | Completed | 03/20/2018 | | tom4@thomasbrown.net | \$100.00 |
| HNC-EP6Y-EZ822 | 1111-2222-3333-4444-5555 | 6X152537E8393699U | Completed | 03/20/2018 | | tom4@thomasbrown.net | \$100.00 |
| Kevin's Calculated Fee Test (Online) (v1.0) Totals (qty: 2): | | | | | | | \$200.00 |
| # 2 Catherine's Fun House Forms Totals (qty: 2): | | | | | | | \$200.00 |

Fee Tests

Fee Processing Tests: Online w/ \$50 Min and No Max (Do Not Change)

| Submission # | Account # | Transaction Id | State | Payment Date | Payer | Email | Amount |
|--|-----------|-------------------|-----------|--------------|-------|----------------------|----------|
| HNC-EPGF-TN0T4 | 123123 | 3LX19023RS4183845 | Completed | 03/20/2018 | | tom4@thomasbrown.net | \$50.00 |
| HNC-EPKP-9QJZJN | 123123 | 27S500305J729163H | Completed | 03/20/2018 | | tom4@thomasbrown.net | \$250.00 |
| Fee Processing Tests: Online w/ \$50 Min and No Max (Do Not Change) Totals (qty: 2): | | | | | | | \$300.00 |

Fee Processing Tests: Online w/ No Min and \$750 Max (Do Not Change)

| Submission # | Account # | Transaction Id | State | Payment Date | Payer | Email | Amount |
|---|-----------|--------------------|-----------|--------------|-------|----------------------|------------|
| HNC-EPOB-WV6JM | 123123 | 3H363415FPJ405801P | Completed | 03/20/2018 | | tom4@thomasbrown.net | \$25.00 |
| HNC-EPTB-JNJRJG | 123123 | 9F5979644T971152C | Completed | 03/20/2018 | | tom4@thomasbrown.net | \$750.00 |
| HNC-EPVU-GSETF | 123123 | 45764140TG9716610 | Completed | 03/20/2018 | | tom4@thomasbrown.net | \$750.00 |
| Fee Processing Tests: Online w/ No Min and \$750 Max (Do Not Change) Totals (qty: 3): | | | | | | | \$1,525.00 |

Fee Processing Tests: Online w/ No Min or Max (Do Not Change)

| Submission # | Account # | Transaction Id | State | Payment Date | Payer | Email | Amount |
|--|-----------|-------------------|-----------|--------------|-------|----------------------|---------|
| HNC-EPJ0-QNXH2 | 123123 | 1ME54611TS831113B | Completed | 03/20/2018 | | tom4@thomasbrown.net | \$25.00 |
| Fee Processing Tests: Online w/ No Min or Max (Do Not Change) Totals (qty: 1): | | | | | | | \$25.00 |

Fee Processing Tests: w/ \$50 Min and No Max (Do Not Change)

| Submission # | Account # | Transaction Id | State | Payment Date | Payer | Email | Amount |
|---|-----------|-------------------|-----------|--------------|-------|----------------------|------------|
| HNC-EP37-TX9MY | 123123 | 2YK26412V50040644 | Completed | 03/20/2018 | | tom4@thomasbrown.net | \$50.00 |
| Fee Processing Tests: w/ \$50 Min and No Max (Do Not Change) Totals (qty: 1): | | | | | | | \$50.00 |
| Fee Tests Totals (qty: 7): | | | | | | | \$1,800.00 |
| Grand Totals (qty: 9): | | | | | | | \$2,100.00 |

Please note that only online payments are reflected with this report. *

9 Administration

Authorized users will have the ability to administer the content available in the system (e.g., organization, forms, etc.). This section will describe the primary options for administering the system. The primary topics in this area include:

- **Manage an Organization (Section 9.1):** The details of how to manage the content for an organization.
- **Add a Form (Section 9.2):** The details of how to add a new form to the system.
- **Manage a Form: (Section 9.3)** The details of how to manage the content for an existing form.
- **Manage a Workflow Template (Section 9.4):** The details of how to establish and manage workflow templates that can be established and injected in to an existing forms and form submission, when appropriate.
- **Using a Calculated Payment Method (Section 9.5):** The details of how to set up a calculated payment.

9.1 Manage an Organization

Organizations are the foundation of form distribution. This area allows users to manage and publish information specific to organizations within the agency for consumption by external users.

After an organization has been created it will be assigned a status of "Draft" and will only be visible to internal users. It will not be available to the public until it has been assigned a status of "Published".

For more detailed information on each of the configurable settings of an organization see the **Organization Details (Section 10.1)** section.


Steps

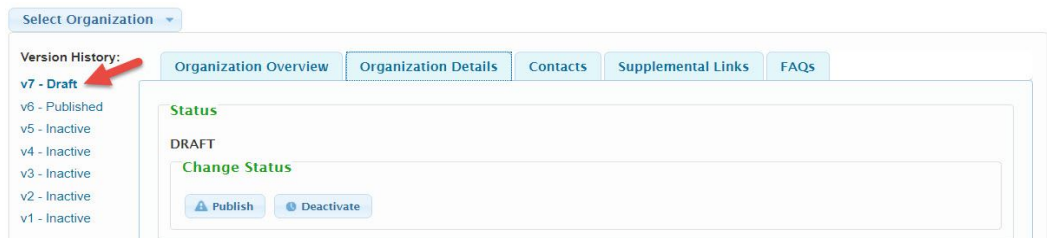
1. Sign into the system.
2. Click on the **Organizations** link from the top menu.



Only users with the organization manager role for an organization will have access to manage an organization and create new subordinate (e.g., child) organizations.



3. Select an organization using the **Select Organization** button on the left and selecting the organization in question.
4. Only *draft* organizations are available for adjustment. If a draft version doesn't exist for a given organization (see image below), a draft version will need to be created. If a draft version exists, click on the existing Draft version from the version history list on the left. If a draft version does not exist, once

can be created by clicking on the **Change to Draft** button () from a Published version.



5. After selecting a draft version the form the user will be allowed to edit the details of the organization can, as needed. See the **Organization Details (Section 10.1)** topic for additional details.
6. When any updates are concluded, use the **Preview** button in the bottom right to review the published version of the Organization.
7. After reviewing the preview, when the Organization is ready to be published for public consumption, click

on the **Details** tab and then click on the **Publish** button () to publish the form for user consumption/use.

 Published or Inactive Organizations can be deactivated by clicking on the **Deactivate** button ().

9.2 Add a Form


This section will describe the steps required to add a new form to the system.

Steps

1. Sign into the system.
2. Select **Forms** link from the top menu.



3. All forms you are eligible to manage will be displayed.
4. Select the **Add New Form** link in the top right hand of the **Form Manager**.
5. A new form with the status of "Draft" will be created.

 Follow the steps described in the **Manage a Form (Section 9.3)** and **Form Details (Section 10.2)** sections for details as to how to configure the properties of a form.

Variations

1. To import a form from a form definition exported from another instance of nFORM:
 - a. Click the **Import New Form** link.
 - b. Select the organization that will be considered the Responsible Organization for the form.
 - c. Select the desired form definition file.
 - d. Click **OK**.
 - e. The form will be created based on the selected form definition.

Note: the form definition will need to match the nFORM standard form definition format. All forms exported from nFORM (from the Form Details Step 1 page) will fit this format.

9.3 Manage a Form

This section will describe how to manage the properties of an existing form and the supporting workflow process(es).


Select a Form


This section will describe how to select a form for editing.

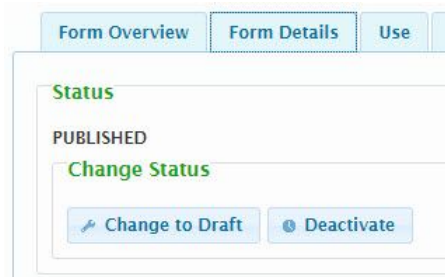
Steps

1. Sign into the system.
2. Select **Forms** link from the top menu.



 Only users with the form designer role for an forms parent organization will have access to manage a form.

3. All forms you are eligible to manage will be displayed on the Forms Manager list.
4. Click the **Edit** icon () for the form you want to edit in the form list by clicking the Edit icon.
5. To make changes to the form make sure you select a status "Draft".
6. Only draft forms are available for adjusted. If a draft version doesn't exist for a given form, a draft version will need to be created. If a draft version exists, select the existing draft from the version history list on the left. If not, a draft version can be created by selecting the **Form Details** tab for the form and clicking the **Change to Draft** button.



7. After you have selected a draft version the form will allow editing and the details of the form can be adjusted as needed.

Configure Form Properties

This section describes the manner in which a user can view or manage form content. The designer consists of three main steps; **Form Details, Sections and Controls** and **Processing Steps and Notifications**. Online applications will require that all three steps be completed. Offline forms will only require Step 1 – **Form Details** be completed.

Step 1: Form Details

This step is used to manage the overarching properties of a form. This is the first of a three step process to design a form.

Form detail information is divided into tabs. Each tab has information that will need to be filled out before a form can be published and made public. Information that is required for a form to be published will be marked with a red asterisk.

For more detailed information on each of the configurable settings of a form see the **Form Details (Section 10.2)** section.

Steps

1. Open an application using the **Add a Form (Section 9.2)** or **Manage a Form** topics.
2. Provide and/or update the details for the form, as appropriate. Provided information will be saved as the information is completed. Additional details on the configurable aspects of this page can be found in the in the **Form Details (Section 10.2)** topic.
3. All required information must be provided before leaving (e.g., Preview, Done, Next, Version Selection, etc.) this form. If an error is presented when attempting to leave the form, resolve the issue presented and try again to continue. Repeat step as necessary.
4. Click on the **Next** button at the bottom right to continue the process and move to **Step 2: Form Sections and Controls**.

Variations

1. If the user is done editing the application for the time being, clicking the **Done** button will return them to the form list.
2. If the user would like to preview the form, click the **Preview** button. Note: you will need to start the submission process (i.e., by clicking the **Submit Online** button from the Form View page to review some of the information managed on this page).
3. If the user would like to export the definition of this form for import in to another instance of nFORM, click the **Export** button. The form definition will be packaged and saved as an individual file.
4. If the user would like to create a new form which contains most of the same properties as the current application, use the **Clone** button. Note: the new cloned form will have no direct relationship to the original form.

Step 2: Form Sections and Controls

This step is used to view and manage the logical sections of a form as well as the controls included in each section. Forms include multiple sections to allow the information on an application to be distributed in logical and consumable groupings of questions and answers. This area is broken into two main components; **Sections** and **Section Controls**.


Sections

The second step to form creation is to design the sections and controls that will be presented to the submitter on the form. This step is used to view and manage the logical sections of a form as well as the controls included in each section and includes the configuration to define logical *sections* of an on-line form as well as instructions and input *controls* to each section. Forms can include multiple sections to allow the information on a form to be distributed in logical and consumable groupings of questions and answers.

The Sections area allow the user to identify the name of each **Section** as well as an introduction for a **Section**. The section describes the editing of an **Section**.

Steps


1. Continue from **Step 1: Form Details** steps described above.

2. If a new section needs to be added, click the **Add Section** button at the top right of the section list and go to step 4.
3. If an existing section needs to be edited, click the **Edit** icon () to the right of the section in question and go to step 4.

4. Provide the properties of the section:
 - a. Enter the **Section Name** for the section as it will appear to the submitter.
 - b. If appropriate, provide the **Instructions**/introduction that will be displayed at the top of the section.
 - c. If the section will be allowed to display conditionally, during submission process, check the **Section is conditionally displayed** checkbox. When checked, the **Display Formula** text field will be enabled for configuration.
 - a. **Display Formula:** The formula used to determine if this section will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.

- b. If the section will support automatically populating data fields in the section, during submission process, check

the **Show Section Auto-Fill Control** checkbox.

 Data must be appropriately staged and additional configuration is required to enable this feature. In addition, it's worth noting that the Auto-Fill option on the Contract Control works independently of this setting.

c. If the section provides the submitter with the ability to repeat a series of questions, check the **Enable Repeater for this Section** checkbox.

Enable Repeater for this Section
 Makes this section's set of fields repeatable, allowing users to create multiple entries of this section

Disable Repeater-Item Add/Duplicate
 Users will not be able add new items to this section's repeater. **Requires additional setup of data source**, to allow for a finite and predefined set of field groups

Disable Repeater-Item Delete
 Users will not be able delete items from this section's repeater. **Requires additional setup of data source**, to allow for a finite and predefined set of field groups

Dynamically Name Repeater items
 The name displayed for each item of the repeater will be derived from the value of specified control(s)

- If the Repeater should not allow the ability to add/duplicate the section, check the **Disable Repeater-Item Add/Duplicate** checkbox. This feature is helpful when a Repeater is automatically prepopulated with data.
- If the Repeater should not allow the ability to delete sections, check the **Disable Repeater-Item Delete** checkbox. This feature is helpful when a Repeater is automatically prepopulated with data.
- If the Repeater should be dynamically assigned a name based on a value on form, check the **Dynamically Name Repeater Items** checkbox. The **Repeater-Item Name Formula** field will be enabled. This formula field allows for specifying the text to display for each item in the list. A great deal of flexibility has been provided with this formula which supports very simple and very complex derivations. For additional details see the **Calculation Based Fees (Section 10.2)** subtopic in the **Form Details (Section 10.2)** topic.

Enable Repeater for this Section
 Makes this section's set of fields repeatable, allowing users to create multiple entries of this section

Disable Repeater-Item Add/Duplicate
 Users will not be able add new items to this section's repeater. **Requires additional setup of data source**, to allow for a finite and predefined set of field groups

Disable Repeater-Item Delete
 Users will not be able delete items from this section's repeater. **Requires additional setup of data source**, to allow for a finite and predefined set of field groups

Dynamically Name Repeater items
 The name displayed for each item of the repeater will be derived from the value of specified control(s)

This field allows you to enter a formula that will create a unique name for each of this section's repeater items, by dynamically concatenating strings. Use any Tag names assigned to existing controls in the form, wrapped in backticks (`), along with any arbitrary text. If the referenced Tag does not have a matching control, the established section name will be used.


Name Formula
 Enter the name that will be displayed to the user for each individual repeater.

Facility Name: `FACILITY_TAG`

Use **Tags** (i.e., wrapped in `backticks`) to reference form attributes. These referenced form attributes can be supplemented with literal text as appropriate. Referenced attributes/controls can be of type Short Text, Single Selection or any Formatted Control and must be contained in this section.

Example
 Site: `SITE_NAME`; Outfall: `OUTFALL_NAME`
 Displays the site name and outfall name in the following format, "Site: ABC; Outfall: XYZ".


d. Enter the formula for deriving the repeating section name in the **Repeater-Item Name Formula** field.

 The following control types are available for use in a name derivation:


- Short Text
- Number
- Read-Only
- Single Select

These controls can be referenced using the assigned Tag value with backticks ` (typically found in the top left corner of the keyboard) around the Tag value (e.g., `Acres`),

e. If the section will be considered optional (e.g., validation only applied if values are entered on the section), check the "This Section is Optional" flag

- Click the **OK** button to continue.
- If an error is presented, resolve the issue presented and click the **OK** button to continue. Repeat step as necessary.
- Adjust the order of the sections by clicking on a section and then dragging it up or down to a new position.
- Click the **Controls** icon () to the right of the section in question to enter the area which will allow you to view and manage the controls.
- Adjust the **Controls** as required for the section in question. Please see the **Controls** area directly below for further details on this area.
- Click on the **Next** button at the bottom right to continue the process and move to **Step 3: Processing Steps**.

Variations

- To delete a section, click the **Delete** icon () to the right of the section in question and confirm the deletion request.
- To add a section from another published form to this form, click on the **Add Existing Section** link at the top of the section list. Select the form where the section exists and the name of the section you would like to import.

 Only published forms can be used.

3. If the user would like to preview the form, click the **Preview** button. Note: you will need to start the submission process (i.e., by clicking the **Submit Online** button from the Form View page to review the sections and controls).
4. If the user is done editing the form for the time being, click the **Done** button to return to the form list.
5. Click on the **Previous** button at the bottom right to return to **Step 1: Form Details**.


Controls

The **Controls** component allows the user to define the questions and information that will be presented within each **Section**. The section describes the editing of the **Controls**.

 For more detailed information on each of the available controls types see the **Controls (Section 10.3)** section.

Steps

1. Continue from **Step 2: Form Sections and Controls – Sections** steps described above.


1. If a new control needs to be added, identify the appropriate control type for the your question, from the **Available Controls** area on the left and click on the control type in question. Go to step 3 below.
2. If an existing control needs to be edited, mouse over the control in question and click on the **Edit** icon () for that control.
3. Provide/update the requested information for the particular control type, as appropriate. Fields with a red asterisk are required. A summary of common control elements can be found below:
 - a. **Label:** Field name/question that will be presented to the submitter.
 - b. **Error/Help Tip:** Text that is displayed when a user hovers the mouse over the user input field. Also used to provide additional information in the case of an in compliant value being entered for a field e.g. a character is entered in a number-only field.
 - c. **Read-Only?:** If the control will be considered read-only, this attribute will be set to "Yes". If the control will be considered read-only, only if prepopulated, this attribute will be set to "If prepopulated". If the control will not be considered read-only, this attribute will be set to "No".
 - d. **Conditionally Display Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - a. **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
 - e. **Autopopulation Value:** When appropriate, some information can be auto-populated in based on information found in a users profile (e.g., user's name, email address, etc.).
 - f. **Default Value:** As needed, a control's value can be defaulted to a particular value using this attribute.
 - g. **Maximum Value:** The maximum number of characters that a user can enter in this field.
 - h. **Required?:** Check this if the user is required to fill in this field.
 - i. **Tag:** A tag value is a unique name assigned to an a control to allow the control to be identified. This attribute is essential for facilitating the data importing and exporting processes. Used to map submission data back to its originating control element within the form. Referenced in formulas (e.g. fees) and when exporting/importing submission data. Only form fields that are "tagged" will be exported. See the TAGging Fundamentals topic in the Integration Guide for additional details on tagging
4. Click the **OK** button to continue.
5. If an error is presented, resolve the issue presented and click the **OK** button to continue. Repeat step as necessary.

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
6. Adjust the order of the controls by clicking on a control and then dragging it up or down to a new position.
7. Click on the Return to Section List button at the bottom to return to the Sections page.


Variations

Delete Control

1. To delete a control, click the Delete icon () to the right of the control in question and confirm the deletion request.
2. If the user would like to preview the form, click the Preview button. Note: you will need to start the submission process (i.e., by clicking the **Submit Online** button from the Form View page to review the controls).

Link/Map a Control to Another Forms Data

1. To link a control to a control on another form, click the Link Control icon () to the right of the control in question. An control mapping dialog will be presented.
2. Provide a link to the source control using the following attributes:
 - a. **Source Section:** The name of the section where the data will be sourced.
 - b. **Source Control:** The name of the control where the data will be sourced.
3. Click the **OK** button to continue.
4. If an error is presented, resolve the issue presented and click the **OK** button to continue. Repeat step as necessary.

 A "Source Form" must be referenced for this option to be available.

For information on how to configure the source form see **Form Pre-Fill (Section 10.2)**.


Step 3: Processing Steps and Step Actions

This step is used to view and manage the default processing steps that a form will follow and the step actions available for each step. This is the third and final step to design a form.

This area is broken into two main components; **Processing Steps** and **Step Actions**.

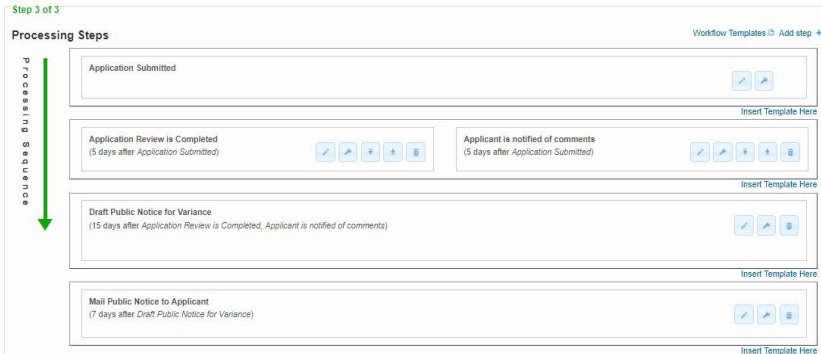
Processing Steps

This processing steps section allows the designer to view and manage the default processing steps that an application will follow. These processing steps can be adjusted as required to meet the needs of the specific form. Processing steps can be assigned to Processing levels. Levels are used to represent steps that can be done in parallel. When two or more processing steps are set at the same level, the next level of steps will not be started until the final processing step on the level is completed.


 Each form will be seeded with the default **Form Submitted** processing step which will anchor the submission process. This step can't be reordered or removed.

Steps

1. Continue from Step 2 **Sections and Controls** described above.



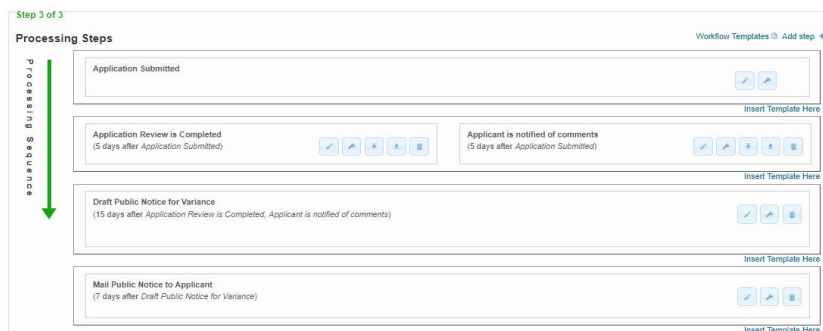
2. If a new processing steps needs to be added, click the **Add Step** button at the top right of the processing step list and go to step 4.
3. If an existing processing step needs to be edited, click the **Edit** icon to the right of the section in question and go to step 4.

4. Provide the properties of the processing step:
 - a. **Step Name:** Enter the Step Name of the processing step as it will appear in the processing step and in any notifications.
 - b. **Target Completion *MM* Days After Previous Step Completed:** Provide the number of calendar days after the previous step the current step is targeted to be completed to allow the system to calculate the target completion date for this step.
 - c. **Default Assignment:** If appropriate, the person the step will be automatically assigned when a form submission reaches this step in the processing of the form.
 - d. **Suppress Step from View for External Users:** If checked, the processing step will not be viewable to external users.
5. Click the **OK** button to continue.
6. If an error is presented, resolve the issue presented and click the **OK** button to continue. Repeat step as necessary.
7. Adjust the order of the processing steps by clicking on a processing steps and then dragging it up or down to a new position. Note: this will change the dependencies and processing steps which will be completed in series (one after another) can be adjusted in this manner.
8. Click the **Step Action** icon () to the right of the processing step in question to enter the area which will allow you to view and manage the step actions.
9. Adjust the **Step Actions** as required for the **Processing Step** in question. Please see the **Step Actions** area directly below for further details on this area.
10. Click on the **Done** button at the bottom right to complete the editing process.

Note: Once the form is complete, please contact the Form Publisher to initiate the form review and publication process.


Variations

1. To delete a processing step, click the **Delete** icon () to the right of the processing step in question and confirm the deletion request.
2. If the user would like to preview the form, click the **Preview** button. Note: you will need to start the submission process.
3. Click on the **Previous** button at the bottom right to return to **Step 1: Form Details**.
4. To remove a parallel step from a grouping of steps (steps will be listed horizontally), click on the **Split** icon (down arrow) to the right of the processing step in question.



Step Actions

Each Processing Step supports actions for a step to inform staff, submitters or other interested parties of developments in processing as well as to automate processing. Each processing step can support custom step actions based on a steps, activation, completion, nearing of a target date, passing of a target date, or fees being satisfied. Examples of these actions include sending an email notification, marking a step as complete, automatically changing submission status, or generating a document.

These step actions can be viewed and managed by clicking on the Step Action icon () for a processing step.

Steps

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- Continue from Step 3 **Processing Steps and Step Actions – Processing Steps** section described above.

The screenshot shows the 'Step Actions' dialog box with a table of actions. The table has columns for 'Step Action', 'Details', 'Activate when the following occurs', and 'Actions'. There are five rows of actions listed.

| Step Action | Details | Activate when the following occurs | Actions |
|--------------------------|---|------------------------------------|-----------------|
| Autocomplete this step | | Step Activated | [Edit] [Delete] |
| Change Submission Status | Change status to: Completed | Fee(s) Satisfied | [Edit] [Delete] |
| Generate Document | Document: License Share document with applicant?: Yes Email Recipient: Applicant(s) | Step Completed | [Edit] [Delete] |
| Send Email | Email Recipient: Staff Step Assignment | Past Due | [Edit] [Delete] |
| Send Email | Email Recipient: Applicant(s) | Step Completed | [Edit] [Delete] |


Buttons: Done

- If a new step action needs to be added, click the **Add Step Action** link at the top right. Go to step 4 below.
- If an existing step action needs to be edited, click on the **Edit** icon for that step action. Go to step 4 below.

The screenshot shows the 'Step Action' configuration dialog box. It includes dropdown menus for 'Action to perform' (Send Email) and 'Activate when the following occurs' (Past Due). There is a section for 'Email Attributes' with a 'Recipient' dropdown (Staff Step Assignment) and a text area for 'Custom text to append to email' containing 'This is a test email.' Buttons for 'OK' and 'Cancel' are at the bottom.


- On the Step Actions dialog, perform the following:
 - Select the **Action to Perform** value. Based on the selected value, the fields presented on the form will change to be based on the attributes necessary to support the selected action type. Available Action Types and associated attributes include:
 - Autocomplete this Step** – Automatically marks the current processing step as completed based on the occurrence of the selected Activate when the following Occurs value.
 - Activate when the following Occurs** – Used to determine the activation trigger for this action. See Share Attributes below for more details on this field.
 - Change Submission Status** – Automatically changes the status of the submission to the selected **Change Status To** value based on the occurrence of the selected **Activate when the following Occurs** value.
 - Activate when the following Occurs** – Used to determine the activation trigger for this action. See Share Attributes below for more details on this field.
 - Change Status To** – The status that will be assigned to the Submission.
 - Generate Document** – Automatically generates a document based on the selected **Document Template** based on the occurrence of selected **Activate when the following Occurs** value and notifies the interested parties.
 - Activate when the following Occurs** – Used to determine the activation trigger for this action. See Share Attributes below for more details on this field.
 - Document Template**: The template that will be used to generate the document. Note: this must be established and uploaded to the Form on Step 1 of the Form Designer. See Document Generation Design Guide for details on this feature.
 - Share document with applicant**: If checked, the submitter will have the ability to view and download the generated document.
 - Email Attributes** – Used to support the shipment of an email notifying the appropriate audience to the generation of the document. See field description below.
 - Send Email** – Sends an email to interested parties of the action having been performed.
 - Activate when the following Occurs** – Used to determine the activation trigger for this action. See Share Attributes below for more details on this field.
 - Email Attributes** – Used to support the shipment of an email notifying the appropriate audience to the action. See field description below.
 - Shared Attributes**:
 - Activate when the Following Occurs**: Perform the selected step action when:
 - Fee(s) Satisfied**: The fee status for the submission is changed to None, Paid or Waived.
 - Completed**: Send notification when the processing step is marked as completed.
 - Activated**: Send notification when the processing step is activated and available for processing.
 - Past Due**: Send notification when the processing step is past its target completion date.
 - Near Target Date**: Send notification when the processing step is nearing the target completion date.
Note: The "near" distinction is derived based on the value that is specific for the form Reminder – Send NN Days Prior to Target Date field.
 - Email Attributes** (Generate Document and Send Email Only):

- a. **Recipient:** The party who will receive the notification. These parties can include:
 - a. **Applicants:** All users who have access to manage the submission.
 - b. **Submitter:** The user who submitted the form.
 - c. **Staff Step Assignment:** The internal staff person who is assigned to the associated processing step.
 - d. **Responsible Staff:** The internal staff person who is assigned to the submission.
 - e. **Internal User:** The specific system user chosen from the drop-down list.
 - f. **Custom Email Address:** Any valid email address.
- b. **Custom text to append to email:** The text entered in this area will be included in the email sent .to the recipient.

 The "nearing" distinction is derived based on the value that is specific for the form Reminder – Send *NW* Days Prior to Target Date field.

5. Click the **OK** button to continue.
6. If an error is presented, resolve the issue presented and click the **OK** button to continue. Repeat step as necessary.
7. Continue to add step actions by repeating the above for each Processing Step where step actions are desired.
8. Click on the **Done** button at the bottom of the Step Action List to return to the **Processing Steps** page.

Variations


1. To delete a step action, click the **Delete** icon () to the right of the Step Action in question and confirm the deletion request.
2. If the user is done editing the Step Action, click the **Done** button on the **Processing Steps** page.

Publish Form

Once the form is fully designed, the designer should preview the form to review and exercise the form layout/behavior. Once verified, the form can be published for use by the community.

Previewing a Form

Once the form is fully designed, the designer should preview the form to review and exercise the form layout/behavior. This can be accomplished by clicking the **Preview** button at the bottom of the page from step within the Form Designer. When the **Preview** button is clicked, a preview of the form will be opened in a new window and the form can be tested through the data entry and submission process.

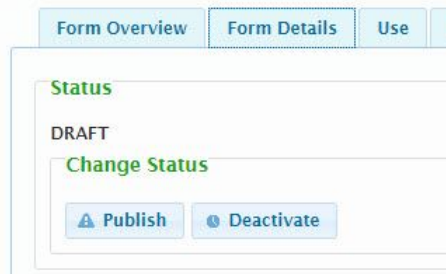
 Preview submission will not be displayed in other areas of the system (e.g., Processing Dashboard, History, Reports, etc.).

Publishing a Form

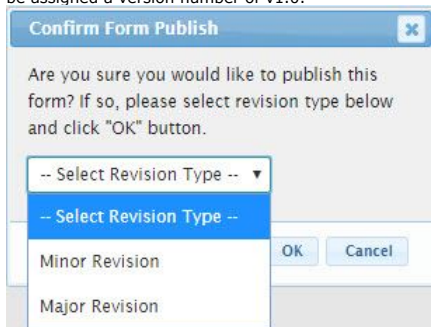
Once verified, the form can be published for use by the community.


To publish a form:

1. Navigate to Step 1: Form Details of the Form Designer.
2. Navigate to the **Form Details** tab of Step 1: Form Details.



3. Click the **Publish** button to initiate the publishing process.
4. If the form was previously published, you will be prompted to select whether the new version should be considered a minor or major version change. If this is a new form, the minor and major version change selector will not be presented and the form will be assigned a version number of v1.0.




 A Minor Revision will increment the secondary version number (e.g., 1.2 to 1.3) where a major revision will increment the primary version number (e.g., 1.2 to 2.0). When a Major Revision is published, where the form does not have the **Promote Form Version for Submission to Publish?** option checked on the **Use** tab, any users that have an in process submission for the old version of the form, will be warned (when they open or submit the form) that it will be at the agency's discretion as to whether submission of the old form format will be accepted, due to the significance of the changes.

5. If any validation issues are identified, correct these and repeat previous steps.

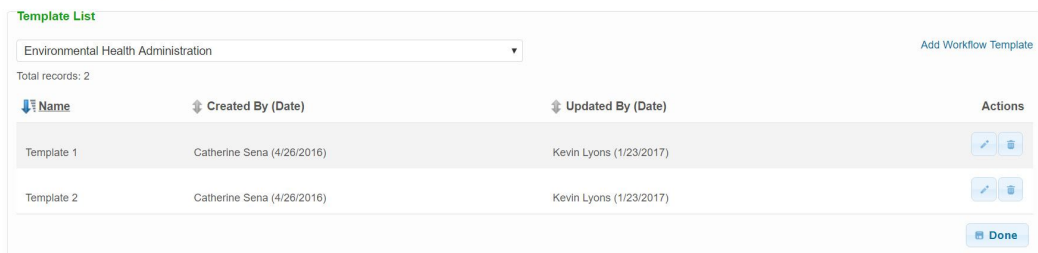
9.4 Manage Workflow Templates in a Form

Workflow Templates can be used to establish standardized workflow processing steps that can be injected in to existing forms and form submissions. This topic will describe how to establish and manage a Workflow Template.

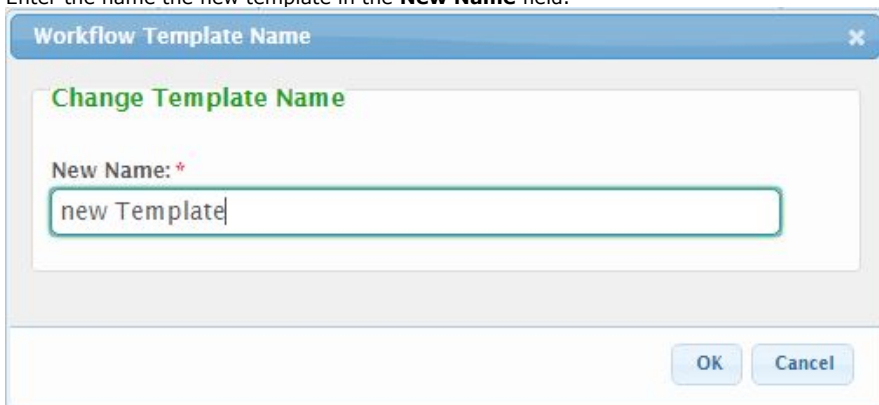
Steps:

1. Select **Forms** link from the top menu.
2. Click the **Edit** icon () for the form to be edited (the form can be in Published or Draft status).
3. To design a new or manage an existing workflow template, click the **Workflow Templates** link at top right of page. The Workflow Template Management page will open.

Workflow Template Management




4. To add a new Workflow Template needs to be added, click the **Add Workflow Template** link at the top right of page.
5. Enter the name the new template in the **New Name** field.



6. Click **OK** button to save the template.
7. Click the **Add Step** link at the top right of the page and begin adding steps to the new template. Unlimited steps can be added to a template.

Template 1 Edit Template Name



8. Click the **Done** button when finished adding steps.
9. To edit an existing Template, click the Edit icon () to the right of the template name.
10. Begin adding or editing the steps of the existing workflow template.
11. Click **Done** button when finished.

Variations

1. To edit an existing Template, click the Edit icon () to the right of the template name. From the template designer, add or edit the steps for the workflow template. Click **Done** button when finished.
2. To make a copy of an existing workflow template, click the **Clone Template** button (



) at bottom left of page. If the user would like to insert an existing group of steps (workflow template) into the processing group sequence, click the appropriate **Insert Template Here** link (draft submissions only). The Template Selection Dialog dropdown box will display allowing user to choose a template to insert. When **OK** button is clicked, the steps from the selected template will be added to the processing steps list.

9.5 Using a Calculated Payment Method

This section described the means for utilizing a calculated payment for a Form. When the fee for the processing a form is based on a calculation of volume such as the acreage or count of a certain item, form designers can use a calculated payment to determine the fee based on a value entered into the form. The following process describes how to create a calculated fee.

Default nForm Agency Users Guide

Form Overview Form Details Use Pre-fill Certification Fees Contacts Supplemental Links FAQs Standard Text Templates Document Templates Internal Data

Fee Options

Account Number:
12345-12345-12345-12345

Payment Processing:
Online or Offline

Payment Remittance Address
111 SW 1st St
Portland, OR 97222

Use Default Payment Voucher?

Payment Voucher Template:
View the existing payment voucher template
Upload a new payment voucher template

Fee Schedule

Fee Type:
 Flat Fee Calculated

| Description | Amount | Order | Actions |
|--------------------------|--------|-------|--------------------------------|
| Small Quantity Generator | 50 | 1 | add fee... |
| Large Quality Generator | 500 | 2 | |

Steps:

1. Sign into the system.
2. Select **Forms** link from the top menu.



3. All forms you are eligible to manage will be displayed on the Forms Manager list.
4. Click the **Edit** icon () for the form you want to edit in the form list by clicking the Edit icon.
5. Select the **Fee** tab and fill out the Fee Description and Account Number (for use with online submissions, if applicable).

Form Overview Form Details Use Pre-fill Certification Fees Contacts Supplemental Links FAQs Notes Document Templates Internal Data

Fee Options

Account Number:
12345-12345-12345-12345

Payment Processing:
Online or Offline

Payment Remittance Address
Dept of Health
Flat Fee Form Mailing address
Suite 123
Some City, OR 97035

Use Default Payment Voucher?

6. Under the Fee Schedule area select the calculated fee option and fill out the fee description and minimum and maximum fee amounts if a minimum or maximum fee applies.

Fee Schedule

Fee Type:
 Flat Fee Calculated

Fee Description
Per Ton Fee

Minimum Threshold (U.S. Dollars)
\$ 1,000.00

Maximum Threshold (U.S. Dollars)
\$ 10,000.00

7. Enter the formula for the calculated payment using the supplied instructions. Please remember the name of the TAG that you utilized so that you can create a Form Control with the correct TAG or assign the tag before you establish the calculation.

Calculation Based Fees:

This feature is designed for advanced users of the nForm system, and requires training.

Instructions for use:

To use a calculated fee in nForm, you have access to the .net compiler to create a formula based on data gathered in your form. Any GNU Compiler syntax is valid. You can reference values input into your form by referencing the TAG NAME you used on the control you intend to reference. The tag must conform to the use you intend to have for the form. For example, if you want to use a number collected from the form as part of the formula, you would need to use the number control from the list of available controls, or your control will not work!


Below is a mapping of the form fields and their use:

- Number = "Number"
- Select Box = "Text"
- Text Box = "Text"
- Date = "DATE"

To use a tag, simply put them between the hashmark in the upper left of your keyboard. Example `TAG_NAME`. You can then use it in your formula.

Formula

```
.25 * `TONS`
```

 Please note that the tag value must be provided within two tick "`" marks (found in the top left of your keyboard below the escape button). An example is `.25*`POLLUTANT_CUBIC_FEET``.



A great deal of flexibility has been provided with this formula which supports very simple and very complex derivations. For additional details see the **Calculation Based Fees (Section 10.2)** subtopic in the **Form Details (Section 10.2)** topic.

10 Reference

This section will provide reference information which can be useful when using the system. The primary topics in this area include:

- **Organization Details (Section 10.1)**: The details of the properties which are configurable for an organization.
- **Form Details (Section 10.2)**: The details of the properties which are configurable for a form.
- **Controls (Section 10.3)**: The details of the properties available for configuration for each control type which can be utilized on a form.
- **Formula Builder (Section 10.4)**: The details of how to utilize the formula builder functionality used throughout the form designer.

10.1 Organization Details

Organization information is divided into tabs. Each tab has information that will need to be filled out before an organization can be published and made public. The following will highlight information available on each tab.

Organization Manager

This page can be used to manage and edit the properties of an organization. Select the organization you would like to manage from the Select Organization button below and adjust the properties as needed below.

The screenshot displays the 'Organization Manager' interface. At the top, there is a 'Select Organization' dropdown menu. Below it, a 'Version History' section lists seven versions: v7 - Draft, v6 - Published, v5 - Inactive, v4 - Inactive, v3 - Inactive, v2 - Inactive, and v1 - Inactive. The main content area is divided into five tabs: 'Organization Overview', 'Organization Details', 'Contacts', 'Supplemental Links', and 'FAQs'. The 'Organization Overview' tab is active, showing the following fields and options:

- Organization Code:** A text input field containing 'EMD'. A note below states: '*Changing org code will take effect immediately and will impact all versions of the organization'.
- Parent:** A dropdown menu showing 'Environmental Health Administration'. A note below states: '*Changing parent org will take effect immediately and will impact all versions of the organization'.
- Visible to users with Internal Organization Viewer or Internal Form Viewer roles only:** A checkbox that is currently unchecked.
- Branding:** A checkbox labeled 'Has Brand' that is currently unchecked.
- Subordinate Organization:** A list of subordinate organizations: 'Clean Air Branch', 'Clean Water Branch', 'Safe Drinking Water Branch', 'Solid & Hazardous Waste Branch', and 'Wastewater Branch'. Below this list is a link: 'add new subordinate organization...'.

At the bottom of the interface, there are two buttons: 'Done' on the left and 'Preview' on the right.

Organization Overview Tab

The screenshot shows the 'Organization Details' tab with the following content:

- Organization Overview** | **Organization Details** | **Contacts** | **Supplemental Links** | **FAQs**
- Organization**
- Organization Code:** EMD
*Changing org code will take effect immediately and will impact all versions of the organization
- Parent:** Environmental Health Administration
Environmental Health Administration
*Changing parent org will take effect immediately and will impact all versions of the organization
- Visible to users with Internal Organization Viewer or Internal Form Viewer roles only:**
- Branding:**
 Has Brand
- Subordinate Organization:**
 - Clean Air Branch
 - Clean Water Branch
 - Safe Drinking Water Branch
 - Solid & Hazardous Waste Branch
 - Wastewater Branch
 - add new subordinate organization...

Organization Code

This is the acronym used to describe the organization. This value is not unique to a specific version of the organization. As such, adjusting this value will apply the change to all versions of the selected organization, in real time.

Parent Organization

If the organization is a part of another (parent) organization the user can assign this parent organization here. This value is not unique to a specific version of the organization. As such, adjusting this value will apply the change to all versions of the selected organization, in real time.

Visible to users with Internal Organization Viewer or Internal Form Viewer roles only

Checking this attribute allows users with Internal Organization Viewer or Internal Form Viewer roles [only] to have visibility to the organization.

Branding: Has Brand

Checking this attribute allows the user to override the default styles associated with the system. If checked, the system will then attempt to utilize the style override found in the custom.css file to replace the default look and feel with a custom one within the context of the organizations children and assigned forms. If this attribute is unchecked, it will not look for a style override. This value is not unique to a specific version of the organization. As such, adjusting this value will apply the change to all versions of the selected organization, in real time.

Subordinate Organizations

This area lists all subordinate or child organizations for the current organization. Click the **Add New Subordinate Organization** link to begin the process of adding a subordinate organization.

Organization Details Tab


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The screenshot shows the 'Organization Details' tab in the nForm Agency Users Guide. The status is 'DRAFT'. The organization name is 'Environmental Management Division' and the form heading is 'Environmental Management Division'. The general instructions section contains text about the Environmental Management Division (EMD) and its role in managing environmental branches within the Department of Health (DOH). The text reads: 'The Environmental Management Division (EMD) is responsible for the management of the environmental branches within the Department of Health (DOH). EMD oversees the clean air, clean water, solid & hazardous water, wastewater, and safe drinking water branches. They provide executive and functional leadership, policy, oversight and coordination for these branches. All permit applications under EMD branches are under the overall management of the EMD and can be accessed through this e-Permitting portal. The division strives to deliver efficient and effective environmental services to the public. To find a specific permit application, please use the Application Finder. You can also use the Organization Browser (on the left) if you know the organization which is responsible for the required permit application. Once a permit application is submitted, our primary goal is to process your permit application(s) in an efficient and timely manner.'

Status

The status of the selected Organization will be displayed. The available statuses include:

- **Published:** This version of the organization is available to the public and is not editable by the organization designer.
- **Draft:** This version of the organization is not available to the public and is editable by the organization designer.
- **Inactive:** This version of the organization is inactive and not editable. This version is used for reference purposes only.

 Only one version of an organization can be published and only one can be in a draft status.

Organization Name

This is the name used to describe the organization. This value is not unique to a specific version of the organization. As such, adjusting this value will apply the change to all versions of the selected organization.

Form Heading

This is the form heading/title that will be displayed on the Organizations Home page.

General Instructions

Any general instructions to support the user in selecting the organization and finding relevant forms.

Contacts Tab

The screenshot shows a web interface with a navigation bar containing 'Organization Overview', 'Organization Details', 'Contacts', 'Supplemental Links', and 'FAQs'. Below the navigation bar, there are two main sections:

- Contact Address:** A text area containing the address: "919 Ala Moana Blvd. Honolulu, Hawaii 96814".
- Other Contact Methods:** A table with columns for Type, Form Label, Value, Order, and Actions. A table below it shows one entry:

| Type | Form Label | Value | Order | Actions |
|-------|------------|--------------|-------|-----------------|
| Phone | Phone | 808-586-4200 | 0 | [Edit] [Delete] |

 A link "add contact method..." is located to the right of the table.

Contact Address

The address used for contacting the organization.

Other Contact Methods

Any additional relevant contacts methods (e.g., email, phone, fax) specific to the organization are provided here.

Add/Edit Other Contact Methods

The 'Manage Contact Method' dialog box contains the following fields and options:

- Type:** A dropdown menu with 'Phone' selected.
- Form Label:** An empty text input field.
- Value:** A text input field containing '(555)-555-5555'.
- Display After:** A dropdown menu with 'Permit Engineer - permitengineer@myagency.gov' selected.
- Spacing:** A checkbox labeled 'Add space below this element' which is currently unchecked.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

When adding/editing an **Other Contact Method**, the following attributes are available:

- A **Type** can be selected to identify the type of contact method being described.
- A **Form Label** can be provided to provide a custom name for the **Other Contact Method**.
- The **Display After** value is used to specify a custom sort order for the list of values.
- To support regional offices and grouping of other contact methods, space can be added between other contact methods checking the **Add space below this element**.

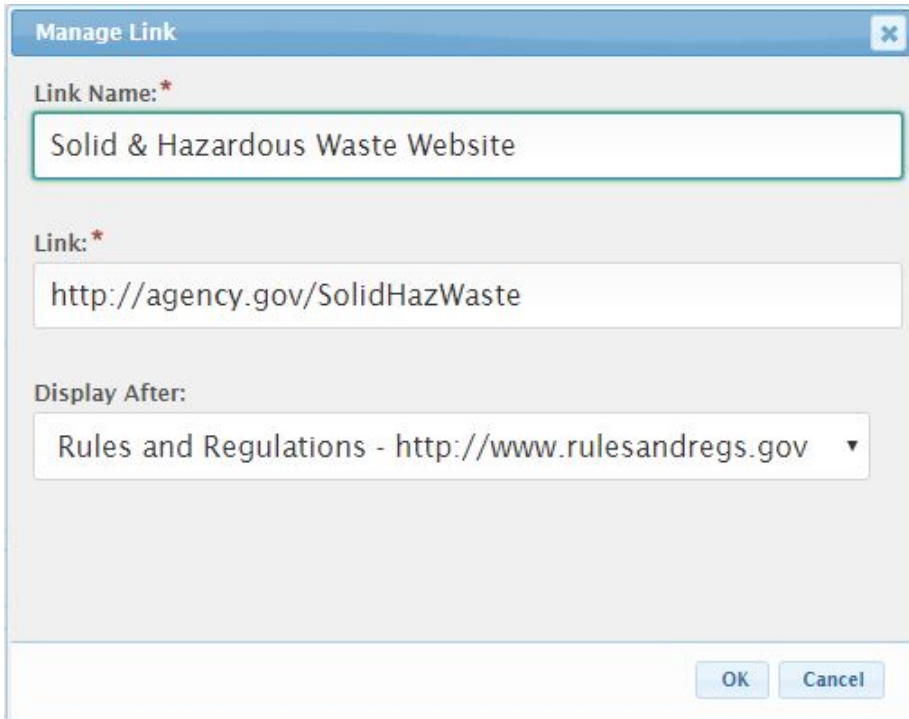
If no value is provided for the Form Label, the Type will be utilized as the name.

Supplemental Links Tab




Any links to other web resources for the organization can be provided here.

Add/Edit Supplemental Link

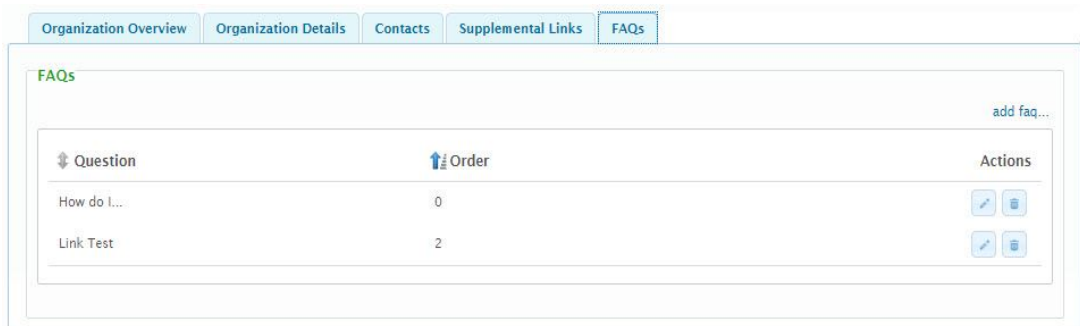


When adding/editing a supplemental link, the following attributes are available:

- A **Form Label** can be provided to control the way the link will be presented to the user. This label will function as the hyperlink on the organization.
- The **Link** field will specify the web address of the web resource (e.g., document or web site).
- The **Display After** value is used to specify a custom sort order for the list of values.

 The Link value must be a fully qualified web address (e.g., http://... for a website).

FAQ's Tab



Any frequently asked questions for the organization can be provided here.


Add/Edit FAQ

The screenshot shows a 'Manage FAQ' dialog box with the following fields:

- Question:** A text input field containing "What fees are associated with this form?"
- Answer:** A rich text editor area containing the Latin text: "Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt."
- Display After:** A dropdown menu currently showing an empty selection.
- Buttons:** 'OK' and 'Cancel' buttons are located at the bottom right of the dialog.

When adding/editing an additional FAQ, the following attributes are available:

- A **Question** is the FAQ question that will be presented.
- The **Answer** is the answer to the question that will be presented to the user for the question is selected.
- **Display After** value is used to specify a custom sort order for the list of values.

 The first few questions will be displayed on the Organization Home page. Any additional questions will be available from a "more FAQs" link on the Organization Home page.

10.2 Form Details

Forms are established in a dynamic manner providing each agency with the flexibility to customize forms for their specific needs.

Form designs are divided into there separate "steps" or areas: Form Details, Sections & Controls and Processing Steps. This topic will describe the Form Details.

The Form Details page is separated in to a number of tabs. Each tab is organized by similar data points and has information that will need to be filled out before a form can be published and made public. Information that is required for a form to be published will be marked with a red asterisk. The following will highlight information available on each tab.

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Step 1 of 3

Version History:
v1.1 - Draft
v1.0 - Published

Form Overview | Form Details | Use | Pre-fill | Certification | Fees | Contacts | Supplemental Links | FAQs | Standard Text Templates | Document Templates | Internal Data

Settings

Responsible Organization:
Wastewater Branch
*Changing responsible org will take effect immediately and will impact all versions of the form

Tag:
SAMPLEFORM_TAG

Identifying Keywords:
permit water
*Changing keywords will take effect immediately and will impact all versions of the form

Form for Internal Use Only:

*Changing to internal will take effect immediately and will impact all versions of the form

Done | Preview | Export | Clone | Next

Form Tab

Form Overview | Form Details | Use | Pre-fill | Certification | Fees | Contacts | Supplemental Links | FAQs | Standard Text Templates | Document Templates | Internal Data

Settings

Responsible Organization:
Wastewater Branch
*Changing responsible org will take effect immediately and will impact all versions of the form

Tag:
SAMPLEFORM_TAG

Identifying Keywords:
permit water
*Changing keywords will take effect immediately and will impact all versions of the form

Form for Internal Use Only:

*Changing to internal will take effect immediately and will impact all versions of the form

Responsible Organization

This is the organization responsible for managing the form. This will be used to determine where the form will be displayed in the system.

Tag

Tags are used to uniquely identify information for a form during any data import and export processes the system may perform. This Tag attribute allows the system to uniquely identify this form across the system. The form tag is also used to deep link directly to a form via direct URL from another system.

Identifying Keywords

This field will allow a user to identify additional keywords that a user may utilize to identify a form (using the Form Finder) which may not appear in the form name, form reference number, form short description, or form general instructions, all of which are used in the form searching capabilities.

Form for Internal Use Only

Identifies if the form will be available for selecting and viewing by the public. If this attribute is checked, the public will not have the ability to find this form.

Details Tab

Status

The status of the selected form will be displayed. The available statuses include:

- **Published:** Available to the public, non-editable.
- **Draft:** Not available to the public, editable.
- **Inactive:** An inactive version of the form that is not editable and is used for reference purposes only.

Form Name

The name of the form that will be displayed throughout the system.

Reference Number

A reference number used to identify the form. This is often used to reference an old paper form number.

Short Description

A brief introduction to the form displayed with the form in the Form Finder results.


Alternate Identifier

The Alternate Identifier allows the form designer to collect data from the submitter, which will then be displayed on the dashboard, and submission headers as a way to associate a meaningful name that the application can remember and search on.

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The **Activate Display of Alternative Submission Identifier** checkbox specifies whether the Alternative Identifier features are enabled. If checked additional settings will be presented, including:

- **Default Display Label:** By default, "Alternative Identifier" is displayed as the label for references to this value. When utilized, the default label (i.e. "Alternative Identifier") will be changed to another value (e.g., Permit Number, Document Number, etc.).
 - **Override Display Label:** To override this display label to a custom value, check the **Override Display Label** checkbox. This will enable the **Custom Display Label** field for entry.
 - **Custom Display Label:** Enter the desired display label value in the **Custom Display Label** field.
- **Alternative ID Control:** The Alternative ID Control field is used to specify the control that will be used to house and manage the alternative identifier. From this field, select Tag value for the control that be considered the Alternative ID Control on the form.


 Only Short Text, Read-Only and Calculated controls, that are assigned a Tag value can be referenced as an Alternative Identifier.

General Instructions

Any general instructions to support the user in selecting and completing the form. This may include information specific to the criteria for filing this form, instructions as to how to fill out the form, relevant laws and regulations, instructions about certifying the submission and/or payment processes.

Default Form Type Value on Form

Specifies a default form type (e.g., New, Renewal, Modification, etc.) for form, if appropriate. A value of "Off" will disable the Default Form Type property on the form.

 The Processing Information step will be skipped in the Submission Wizard if the **Default Form Type Value on Form** is equal to "Off" and no processing questions (e.g., project type, fee, etc.) need to be asked of the submitter.

Lock Form Type Field on Form

The **Default Form Type Value on Form** checkbox specifies whether the **Select the appropriate reason for this submission** field on the **Processing Info** step of the submission will be locked so the above Default Form Type cannot be changed by the submitter.

Copy As New

The **Enable Copy as New** checkbox specifies will the submitter will have the ability to copy a submission for this form, as a new submission.

Label for Confidential Attachment Justification Field

The label that will be displayed above the confidential attachment justification field to inform the user to provide a reason if they wish to keep an attachment confidential. Note: this will only be utilized if the submitter identifies an attachment to be confidential.

Reminders and Deadlines

Reminders and deadlines allow agency staff to assign target benchmarks for processing submissions as well as to support configurable notifications. Once configured, these benchmarks can be utilized in custom reports.

- **Reset Steps on Revision:** If checked, the timelines and benchmarks for processing the submission will be reset following a revision of a submission.
- **Reminders:** Specifies when notifications will be sent and establishes benchmarks for completion of the form.
 - **Send NN days prior to target date:** Specifies the number of days prior to a given process steps target date that "Near Target Date" notifications should be distributed. These Notifications are configured in the Trigger Action field (i.e., Action: "Near Target Date") of the Workflow Notifications area of the Form designer. Note: notifications will only be sent to the users who are configured to receive such alerts on the processing step notifications area. See Processing Step Notifications below for further details
 - **Complete form within NN days of submission:** Species the number of calendar days the agency is targeting to have completed the form (e.g., assigned a finalizing status such as Issued or Denied status).
 - **Complete form within NN days of being deemed complete:** Specifies the number of calendar days, after a submission is deemed complete (i.e., assigned the "Deemed Complete" status), that the agency has targeted to have completed the form (e.g., assigned a finalizing status such as Issued or Denied status). Note: this benchmark is only relevant if the "Deemed Complete" Submission Status is enabled.

Date Tracking


Provides visibility to important dates for the form.


- **Last updated by:** A record of when and who last modified the form.
- **Published by:** A record of when and who published the form, if published.
- **Inactivated by:** A record of when and who inactivated the form, if inactive.

Use Tab

Promote Form Version for Submissions on Publish?

If checked, indicates that published updates to a form, should be automatically applied to any previously started draft submissions of the form, when the submitter reopens the submission.

 Please note that in order to take advantage of this feature, this setting will need to be turned on prior to a submission being started. Essentially, activating this feature enables the "tracking" of any form design changes.

 If this configuration is enabled, when a user opens their submission, they will be notified that the draft submission will be promoted to the latest form definition in order to continue with the submittal process.

Online Submission Available?

If checked, indicates that the form can be completed using the online submission.

Allow Contact Re-Use?

If checked, indicates that submitters will have the ability to re-use entered contact information within a form submission.


Offline Form Available?

The **Offline Form Available?** checkbox specifies whether the user can download an electronic copy of the submission and submit this form outside of the system. These can be utilized for forms that are not suitable for online submission or as an offline alternative. If this value is selected, additional fields will be available and **Allow to Print Blank Form?** feature will not be available:

- **To view the existing form, click here:** If an electronic version of the form was previously uploaded, this document can be viewed and downloaded by clicking on this link.
- **To upload a new form, please click here:** This link allows the user to select and upload an electronic version of the form. Files will be virus scanned on upload.

Allow to Print Blank Form?

If checked, users will have the ability to print a blank version of the form for reference purposes. If checked, **Offline Form Available?** feature will not be available.

 This print option will only be available if configured to be enabled in the system.

Prefill Tab

Form Pre-Fill

This area is used to specify whether the form supports the ability to automatically import data for the entire form or individual sections of the form. If enabled, the system will enable the tools/process for populating the form based on data available to the system. The import method will need to be configured and the import data must be staged

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before this feature will be functional for the submitter.

There are two main forms of pre-fill: **Import from Previous Submission** or **Import from External Source (SQL)**.

Import from Previous Submission
Users will be asked to select an existing submission of the following form:
Source Form
Notification of Construction or Modification (Air and Radiation)

Source Submission Selection Prompt
When starting a new form, users will be prompted to select a specific submission of Notification of Construction or Modification (Air and Radiation), whose data will then be used to pre-fill their form.

Prompt Label
None Provided

Instructive Text (optional)
None Provided

Source submission is required

Restrict choices to user's own submissions of Notification of Construction or Modification (Air and Radiation)

Enable 'autocomplete' suggestions on submission selection
Use this option with caution, as users may be able to "fish" for data using this control.

To enable data import from a prior form submission, a source form must be selected. Under the **Import from Previous Submission** section, available source forms are listed within the drop down menu under **Source Form**. Once a form is selected, the **Source Submission Selection Prompt** box will display.

If a source form is identified, external users will be prompted to provide a submission number for the source form before beginning the submission process. If no submission number is entered, the will not be prefilled with previous submission data.

Custom Prompt Label and Instructive Text can be configured to instruct external users on how to provide the needed submission number.

If **Source submission is required** is checked, a user will be unable to complete and submit the form unless they first provide a submission number from which to prefill data.

If **Restrict choices to user's own submissions of Form Name** is checked, only submissions done by the same user account will be accepted.

If **Enable 'autocomplete' suggestions on submission selection** is checked, prompts will appear with suggestions for the form field based on data in the database. Use this option with caution as users may be able to "fish" for data using this fill option.

Only one **source form** can be selected as the donor form from which previous submission data can be imported to prefill a new submission form.

Once the Import from Previous Submission settings are configured on the Pre-fill tab of Form Details, individual controls within the form will need to be linked to a source control from the source form. For information on how to do this, see **Link/Map a Control to Another Forms Data (Section 9.3)**.

Import from External Source (SQL)
Advanced Feature — Ask your administrator for more information.

SQL Data Source Selection Prompt
The usage of custom pre-fill integrations (database pre-fill) requires additional setup in the data layer of the application. Please contact your administrator for instructions.
When starting a new form, users will be prompted to input one or more identifiers that point to the data source that will be used to pre-fill their form.

Initial Context Identifier

Prompt Label
Permit Number

Instructive Text (optional)
None Provided

Tag (Context Type)
PermitNumber

Restrict choices to user-specific contexts

Enable 'autocomplete' suggestions
Use this option with caution — Without user-restricted data source options, users may be able to "fish" for data using this control.

Data source is required

To enable data import from an external source, the box for **Import from External Source (SQL)** must be checked. Similarly to importing data from previous submissions, custom prompt label and instructive text can be configured to provide the external user with instructions.

Selecting **Restrict choices to user-specific contexts** will limit available data for import to data tied to the specific user completing the submission.

If **Enable 'autocomplete' suggestions** is checked, prompts will appear with suggestions for the form field based on data in the database. Use this option with caution as users may be able to "fish" for data using this fill option if there are no restrictions on data source options.

Certifications Tab

Form Overview Form Details Use Pre-fill Certification Fees Contacts Supplemental Links FAQs Standard Text Templates Document Templates Internal Data

Certification Requirements

Create Copy of Record
Creates a Copy of Record (PDF archive) for each submission. This option is mandatory when signatures are required.

Enable Review step
Includes a Review step on the form, which displays a summary of all entered information. Submitters will be required to view it before submitting.

Signature(s) required
Requires one or more signatures at submission time.

Access
Allow only users who meet the following criteria to submit this form:

Unrestricted (user registration not required)

Registered Users

Verified Registered Users (including Electronic Signature-certified users)

Certification Statement
This text will be presented when prompting the user for their signature

Normal (Size) B I abc U

I certify under penalty of law that the document and all attachments were prepared under my direction or supervision in accordance with a system designed to assure that qualified personnel gather and evaluate the information submitted. Based on my inquiry of the person or persons who manage the system, or the persons directly responsible for gathering the information, the information submitted is, to the best of my knowledge and belief, true, accurate, and complete. I am aware that there are significant penalties for submitting false information, including the possibility of fine and imprisonment for knowing violations.

I understand that it is the Permittee's responsibility to ensure and verify receipt of this request by the Department and that the Permittee is required to immediately notify the Department in writing should conditions or information provided in this request, upon which approval may be granted, change.

body div

Form Overview Form Details Use Pre-fill Certification Fees Contacts Supplemental Links FAQs Standard Text Templates Document Templates Internal Data

Certification Requirements

Create Copy of Record
Creates a Copy of Record (PDF archive) for each submission. This option is mandatory when signatures are required.

Enable Review step
Includes a Review step on the form, which displays a summary of all entered information. Submitters will be required to view it before submitting.

Signature(s) required
Requires one or more signatures at submission time.

Supported Signature Methods

Digital (in-app) signature
Users can certify their submission directly in the application, with a digital signature, as the final step of submission. Users who wish to sign must obtain electronic-signatory permissions by registering with the agency.

Hard-copy signature
The submitter will certify their submission by printing a signature form, which they (and any other signers) will sign, and mail to the agency.

Digital Signature Options

Enable signing invitations
Allows the submitter to invite other individuals to sign the submission, in addition to (or instead of) themselves.

Enable multiple signatures
Allows the submitter to invite multiple individuals to sign the submission.

Role-based signing
The submitter will request specific title-holders to sign the submission (e.g., Engineer, Supervising Officer, Owner, Operator, etc.).

Enable role-based signing

Signing Roles Add signing role...

| Role Name | Certifying Statement | Help Text | Actions |
|--|---|--|---------|
| Responsible Corporate Official or Authorized Agent | I certify under penalty of law that the document and all attachments were prepared under my direction or supervision in accordance with a system designed to assure that qualified personnel gather and evaluate the information submitted. Based on my inquiry of the person or persons who manage the system, or the persons directly responsible for gathering the information, the information submitted is, to the best of my knowledge and belief, true, accurate, and complete. I am aware that there are significant penalties for submitting false information, including the possibility of fine and imprisonment for knowing violations. I understand that it is the Permittee's responsibility to ensure and verify receipt of this request by the Department and that the Permittee is required to immediately notify the Department in writing should conditions or information provided in this request, upon which approval may be granted, change. | A Responsible Corporate Official or Authorized Agent is to sign this document. | |
| Engineer | I certify under penalty of law that the document and all attachments were prepared under my direction or supervision in accordance with a system designed to assure that qualified personnel gather and evaluate the information submitted. Based on my inquiry of the person or persons who manage the system, or the persons directly responsible for gathering the information, the information submitted is, to the best of my knowledge and belief, true, accurate, and complete. I am aware that there are significant penalties for submitting false information, including the possibility of fine and imprisonment for knowing violations. I understand that it is the Permittee's responsibility to ensure and verify receipt of this request by the Department and that the Permittee is required to immediately notify the Department in writing should conditions or information provided in this request, upon which approval may be granted, change. | Engineer must sign submission. | |

The form will be automatically submitted when each of the above roles has been signed for.

Hard Copy Signature Form

Use Default Template Use Custom Template

Certification Requirements

- **Create Copy of Record:** If checked, a Copy of Record (PDF archive) will be created for each submission. This option is mandatory when signatures are required.
- **Enable Review Step:** If checked, the form will include a Review step on the form, which displays a summary of all entered information. Submitters will be required to view it before submitting. This option is mandatory when signatures are required.

- **Signature(s) Required:** Requires one or more signatures at submission time.
 - **Digital (in-app) Signature:** If checked, users can certify their submission directly in the application, with a digital signature, as the final step of submission. Users who wish to sign must obtain electronic-signatory permissions by registering with the agency.
 - **Digital Signature Options:**
 - **Enable Signing Invitations:** Allows the submitter to invite other individuals to sign the submission, in addition to (or instead of) themselves.
 - **Enable Multiple Signatures:** Allows the submitter to invite multiple individuals to sign the submission.
 - **Role-Based Signing:** The submitter will request specific title-holders to sign the submission (e.g., Engineer, Supervising Officer, Owner, Operator, etc.).
 - **Enable Role-Based Signing:**
 - **Signing Roles:** Specific signing roles (e.g., Engineer, Supervising Officer, Owner, Operator, etc.) can be requested and configured here. For each signing role, the user can provide the following:
 - **Role Name:** A name for the signing role (e.g., Engineer, Supervising Officer, Owner, Operator, etc.). This role will be presented to the external users.
 - **Certifying Statement:** The certification text will be presented when prompting the user for the signature for this role. This text can describe what the user is certifying and agreements the submitter are making by signing the form. Each role can have a unique certification statement.
 - **Help Text:** Any supporting text that should be presented with the signing role to give users further direction as to the role being requested for signing (e.g., "At least one owner must sign this form.").
 - **Certification Statement:** The certification text will be presented when prompting the user for certification or signature. This text can describe what the user is certifying and agreements the submitter are making when certifying/signing the form. Note: this configuration field will be presented with individual roles if **Enable Role-Based Signing** is checked.
 - **Hard-Copy Signature:** If checked, users can certify their submission by printing a signature form, which they (and any other signers) will sign, and mail to the agency. If this option is selected, the form designer will need to select the default template or can upload a custom hard-copy signature form using the "Use Custom Template" option in the Hard Copy Signature Form area.
- **Access:** Allow only users who meet the following criteria to submit this form: Note: these options are only available if **Signature(s) Required** is disabled.
 - **Unrestricted (user registration not required):** If this option is selected, anyone can submit the form.
 - **Registered Users:** If this option is selected, any person that has self-registered an account can submit the form.
 - **Verified Registered Users (including Electronic Signature users):** If this option is selected, any person that has self-registered an account and who's user information has been verified to be correct by the agency can submit the form.

Fees Tab

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Fee Options

Account Number:

Payment Processing:

Payment Remittance Address

Use Default Payment Voucher?

Payment Voucher Template:
[View the existing payment voucher template](#)
[Upload a new payment voucher template](#)

Fee Schedule

Fee Type:
 Flat Fee Calculated

| Description | Amount | Order | Actions |
|--------------------------|--------|-------|---|
| Small Quantity Generator | 50 | 1 | add fee... <input type="button" value="edit"/> <input type="button" value="delete"/> |
| Large Quality Generator | 500 | 2 | <input type="button" value="edit"/> <input type="button" value="delete"/> |

Fee Options

Account Number

The primary account number for where the processing fee will be distributed within the agency's accounts. This is for reference and reporting purposes only.

Payment Processing

There are multiple options for allowable payment methods for an form. These options include:

- **Online Only:** If this option is selected, online payments will be enabled for this form. Online payments allow the submitter to pay any fees via a 3rd party payment processor, if feature is enabled and configured.e
- **Offline Only:** If this option is selected, offline payments will be enabled for this form. Offline payments allow the submitter to print a remittance slip, write a check and send a payment to the agency, for any fees due.
- **Online or Offline:** If this option, is selected, Both online or offline payment methods are supported. The user can decide which method best suits their needs.

Payment Remittance Address

The address where form fee payments should be remitted.

Use Default Payment Voucher?

If checked, the system default payment voucher will be presented to the submitter. If unchecked, a customized payment voucher template can be uploaded (on the setting following this option) and utilized for submissions of this form and additional fields will be available under the Payment Voucher Template heading:

- **View the existing payment voucher template:** If a custom template was previously uploaded, this document can be viewed and downloaded by clicking on this link.
- **Upload a new payment voucher template:** This link allows the user to upload a customized payment voucher template can be uploaded and utilized for submissions of this form. Files will be virus scanned on upload.

For more information about custom payment vouchers, contact an administrator.

Fee Schedule

Fee Type


There are multiple options for allowable fee types for a form. These options include:


- **Flat Fee:** The initial fee assessed for the submission will be a standard amount.
- **Calculated:** The fee will be calculated based on the properties of the submission.

Flat Fees

Any flat fee(s) specific to the form can be configured here. For each flat fee, the user must provide the following:

- **Fee Description:** Describes the fee. This value will be presented to the submitter.
- **Fee Amount:** Specifies the amount of the flat fee.
- **Display After/Order:** Specifies a custom sort order for the list of values.


 If "Flat Fee" is selected as the **Fee Type**, at least one fee must be provided.

 One or more flat fees can be established, allowing the user to select the appropriate flat fee (e.g., Small Quantity Generator or Large Quantity Generator), when appropriate.

Calculation Based Fees

The details of the calculated fee that will be charged to process the form. The following will describe the available properties for a calculated fee.


- **Fee Description:** A name or short description of the calculated fee.
- **Minimum Threshold (U.S. Dollars):** If a minimum fee will be applied to the calculation (e.g., fee will be at least \$100), it can be identified using this property.
- **Maximum Threshold (U.S. Dollars):** If a maximum fee will be applied to the calculation (e.g., fee will not exceed \$1,000), it can be identified using this property.
- **Formula:** The formula for calculating the fee for the form submission will be established using this property. A great deal of flexibility has been provided with this formula field which supports very simple and very complex calculations.


 The following control types are available for use in a fee calculations:

- **Short Text Control:** The Short Text control is assumed to be a decimal value, by default.

- **Number Control:** The Number control is assumed to be a decimal value, by default.
- **Read Only Control:** The Read Only Control is assumed to be a decimal value, by default.
- **Single Select Control:** The Single Select control is assumed to be a string value, by default.
- **Date Control:** The Number control is assumed to be a date value, by default.

These controls can be referenced by the assigned Tag name with tick "`" marks (typically found in the top left corner of the keyboard) around the Tag name (e.g., `Acres`).

 To convert a field from a numeric (e.g., decimal) value to a string use the ".ToString" function to enable string comparisons. Example: FeeStatus.ToString

 When including numeric values in your formula, you should include at least two decimal places (e.g., 98.00) with the numeric value to ensure that the equation does not convert all numbers to integers and introduce potential rounding issues.

Mathematical Operators


Available mathematical operators include, but are not limited to the following:

- + Add
- Subtract
- / Divide
- * Multiply

Other Operators

Other available operator include, but are not limited to the following:

- == Equals Comparison
- > Greater Than Comparison
- => Greater Than or Equal to Comparison
- < Less Than Comparison
- =< Less Than or Equal to Comparison
- ? : If Then Else
- .Count() for counting instances of an element
- .Sum() for summarizing values

 Additional more advanced operators are available to handle complex equations. These should be handled on a case by case basis and may require assistance. A list of the more advanced operators can be found [here](#).

Examples

The following will provide examples of some of the types of formulas which can be utilized. These examples use the following variables:

- *Acres*: The Tag name assigned to a Number control on the form which allows the submitter to specify the number of acres the form will cover.
- *Flow*: The Tag name assigned to a Number control on the form which allows the submitter to specify the flow in million gallons per day.
- *FeeStatus*: The Tag name assigned to a read-only Short Text control on the form which allows the submitter to specify whether a fee is required.

Simple Per Unit Calculation

```
10.00*`Acres`
```

Base Fee Plus Multiplier Calculation

```
5000.00+((900.00) (`Flow`-1.00))
```

Adding Values Provided from an Element in a Repeatable (tabbed) Form Section Calculation

```
10.00*`Acres`.SUM()
```

Using Maximum Value Provided in an Element in a Repeatable (tabbed) Form Section Calculation

10.00*`Acres`.MAX()

Using Count Value Provided in an Element in a Repeatable (tabbed) Form Section Calculation

10.00*`Acres`.COUNT()

Using If Then Else Value

`FeeStatus`.ToString == "Exempt" ? 0.0 : 10.00*`Acres`

Contacts Tab

| Type | Form Label | Value | Order | Actions |
|--------|--------------------|-----------------------------|-------|-----------------|
| E-mail | Permitting Manager | manager@myagency.gov | 0 | [Edit] [Delete] |
| E-mail | Permit Engineer | permitengineer@myagency.gov | 1 | [Edit] [Delete] |

Contact Address:


The contact address for the form.

Other Contact Methods:

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When adding/editing an Other Contact Method, the following attributes are available:

- A **Type** can be selected to identify the type of contact method being described.
- A **Form Label** can be provided to provide a custom name for the **Other Contact Method**.
- The **Display After** value is used to specify a custom sort order for the list of values.
- To support regional offices and grouping of other contact methods, space can be added between other contact methods checking the **Add space below this element**.

 If no value is provided for the **Form Label**, the Type will be utilized as the name.

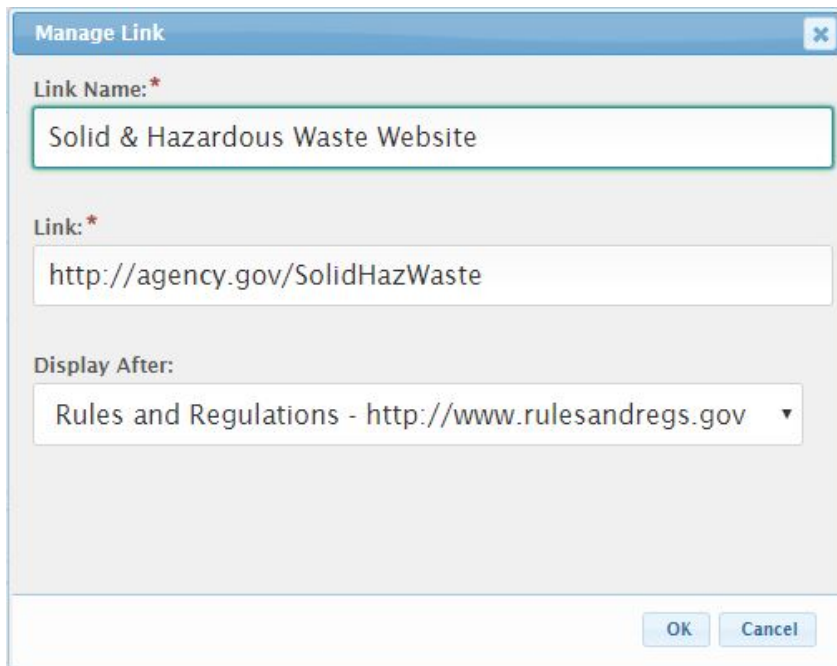
Links Tab



| Name | Link Path | Order | Actions |
|-----------------------|-----------------------------|-------|---|
| Main Agency Page | http://www.myagency.gov | 0 |   |
| Rules and Regulations | http://www.rulesandregs.gov | 1 |   |

The Links area allows a user to configure links to other web resources for the form.

Add/Edit Additional Link



Manage Link

Link Name: *
Solid & Hazardous Waste Website


Link: *
http://agency.gov/SolidHazWaste

Display After:
Rules and Regulations - http://www.rulesandregs.gov

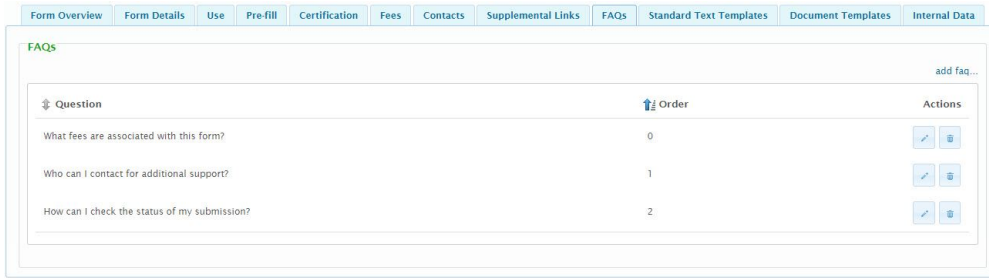
OK Cancel

When adding/editing an additional link, the following attributes are available:

- A **Form Label** can be provided to control the way the link will be presented to the user. This label will function as the hyperlink on the organization.
- The **Link** field will specify the web address of the web resource (e.g., document or web site).
- The **Display After** value is used to specify a custom sort order for the list of values.

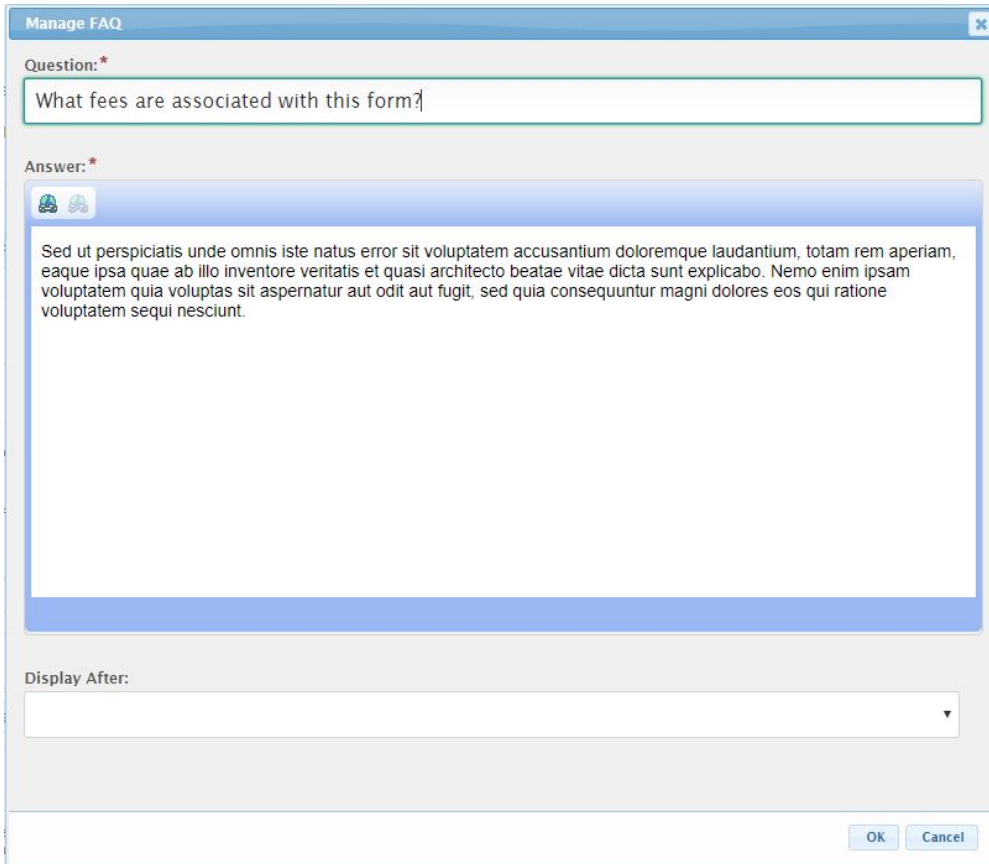
 The Link value must be a fully qualified web address (e.g., http://... for a website).

FAQs Tab



Any frequently asked questions for the form can be provided here.

Add/Edit FAQ



When adding/editing an additional FAQ, the following attributes are available:

- A **Question** is the FAQ question that will be presented.
- The **Answer** is the answer to the question that will be presented to the user for the question is selected.
- **Display After** value is used to specify a custom sort order for the list of values.

Standard Text Template Tab



Any standard text templates that have been approved for the form can be provided here. The standard text templates are intended to provide each organization to provide consistent communication with the submitter. These standard text templates will be available for selection by the processing staff when processing a submission (e.g., Correction Requests, Informational Messages, etc.).

Add/Edit Standard Text Template

Manage Standard Text Template

Standard Text Template Title: *

Application Non-Compliant

Standard Text Template Definition: *

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo.

Display After:

OK Cancel

When adding/editing an standard text template, the following attributes are available:

- A **Standard Text Template Title** will describe the standard text template in simple terms. This will be the value that is presented to a user when selecting the standardized text template.
- The **Standard Text Template Definition** is the standardized text that will be imported in to the note when selected.
- The **Display After** value is used to specify a custom sort order for the list of values.

Document Templates Tab

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Document Templates

add document template...

| Display Name | File Name | Actions |
|--------------|-----------------------|-----------------|
| License | License Template.docx | [Edit] [Delete] |

Any document templates that can be utilized within the form (e.g., Step Actions) can be provided here. The document templates can be used to support any document generation processes.

Add/Edit Document Template

Manage Document Template

Document Template

Display Name: *

Document Template: *

Click the "Upload Template" button to select a file to upload.

+ Upload Template

OK Cancel

When adding/editing a document template, the following attributes are available:

- A **Display Name** will configure the name that will be utilized when presenting the document template or results of the template. This will be the value that is presented to a user when viewing a document

generated from this template.

- The **Upload Template** button is used to select and upload a document template. Files will be virus scanned on upload.

Internal Data

Internal data controls/fields are available to allow additional internal only data points to be added to a form to support the submission process. This area is for the setup of these internal data controls (for collecting additional information, by internal staff).

Add/Edit Internal Data Controls

- Click on the **Internal Data** tab.



- Click the **Edit Internal Controls** button to open the list of internal data controls that have been configured.

Internal Controls

Internal controls are used to provide additional data to a submission by providing a means for designers or processors to create a name/value pair either when they are designing the form, or processing a submission that will become part of the submission itself. This functionality can be helpful when additional data needs to be collected in nForm, or used to facilitate integrations. This area is for the setup of the controls for collecting the information. The information will be entered directly in the Internal Data Tab.

| Label | Type | Sort | Actions |
|-------------------------------|----------|------|---------|
| Information Package Complete? | CHECKBOX | 0 | |
| Folder Number | TEXT | 1 | |
| Final Permit Number | TEXT | 2 | |

add control...

- Click the **Add Control** link to add a new internal data control. To edit an existing internal data control, click the **Edit** button to the right of the control in question.
- **Add/Edit Internal Data Controls** – When adding/editing an Internal Control, the following attributes are available:

- A **Label** will describe the internal control. This will be the value that is presented to a user when working with internal controls.
- The **Type** specifies the type of internal control. Internal Controls can be of the following Types:
 - Checkbox
 - Date
 - Dropdown
 - Paragraph
 - Text
 - Time
- The **Show After** value is used to specify a custom sort order for the list of values.
- The **Tag** value is a unique name assigned to an internal control to allow the control to be identified. This attribute is essential for facilitating the data importing and exporting processes.
- The **Read-Only** attribute is used to make an internal data control read-only and locked. This is useful when populating the internal data control value based on a value entered on the submission.
- The **Populate with Submission Data** is used to configure an internal data control to be populated based on a value from the submission. If checked, the **Source Section**, **Source Control**, and **Update linked data on submission revision** fields will be displayed. These values will be used to link the internal data control to a field within the submission.

- The **Source Section** field is used to select and identify the section which houses the field that will be copied to the internal data control field.
- The **Source Control** field is used to select identify the control (within the selected Source Section) which represents the field that will be copied to the internal data control field.
- Check the **Update linked data on submission revision** field to configure the internal data

control to be updated to the latest value following each submission. If this value should remain untouched following the initial submission (and any changes by internal staff), leave this attribute unchecked.

- Click **Save** to save internal data control.

10.3 Controls

This section details each control type which is available to be included in a form as a form element and the typical usage of each. Currently available control types include:

- **Simple:** The Simple controls allow for support of the more basic data display/capture. Simple controls include:
 - **Instructions:** The instruction control is used for conveying information to the submitter. This can be used to communicate instructions or to provide context for a particular question, section or the form as a whole. This control also provides the ability to display a horizontal line or a hyperlink, when appropriate.
 - **Paragraph:** The Paragraph control is used to capture longer text values such as a detailed descriptions or an explanation.
 - **Selection:** Selection controls are used to allow the submitter to select one or more values from a pre-defined list.
 - **Single Selection:** The Single Selection control is used to capture an individual value selection from a list (i.e., dropdown list).
 - **Multiple Selection:** The Multiple Selection control is used to capture one or more values from a list (i.e., dropdown list).
 - **Short Text:** The Short Text control is used to capture a specific text value such as a name or a short descriptor.
 - **SSN:** The SSN control is used to capture Social Security Numbers (SSN) and control display (or lack there of) of the values in this field, as appropriate.
- **Formatted:** The Formatted controls allow a user to capture data of a particular format. Formatted control types include:
 - **Date:** Used to enforce an entered value is a valid date (e.g., 1/1/2012). This control provides a date picker utility for eased date selection.
 - **Email:** Used to enforce an entered value is a valid email address (e.g., me@mydomain.org).
 - **Number:** Used to enforce an entered value is numeric (e.g., 1001). This control provides up/down buttons for incrementing the numeric value up and down.
 - **Phone:** Used to enforce an entered value adheres to standard phone number format (e.g., 555-555-5555 x555).
 - **Time:** Used to enforce an entered value is a valid time (e.g., 12:00 am). This control provides a time picker utility for eased time selection.
 - **URL:** Used to enforce an entered value adheres to standard URL format (e.g., <https://www.mysite.org>).
- **Advanced:** The Advanced controls allow for support of the more advanced data capture capabilities. Advanced controls include:
 - **Address:** The Address control captures a standard address such as submitters address, work site.
 - **Attachment:** The Attachment control allows for capture/upload of electronic document(s).
 - **Calculated:** The Calculated control allows for calculated of a value based on a formula. The calculated value can be derived based on values found in other controls on the form.
 - **Contact:** The Contact control allows for capture of detailed information for a contact person, including attributes such as a name, title, company, phone numbers, email, and address, etc.
 - **Hidden Text:** The Hidden Text control allows for data to be included in a form, but hidden, when appropriate, for storing data used by the import/export processes, that may have no meaning to the submitter.
 - **Location:** The Location control allows for the capture of a latitude and longitude for a particular spatial point/location. Users can search for a location by an address, entry of a latitude and longitude decimal value or use of a Google map to point to and identify a specific location.
 - **Name:** The Name control captures a Name and Title value. This can be used to capture the name/title of a owner, operator or project manager.
 - **Tables:** Table controls allow for the capture of a table of data from the submitter. The Table controls currently supported, include:
 - **Advanced Table:** The Advanced Table control allows for the capture and/or display of data in a highly formatted table structure. Users can interact with the table (e.g., adding/removing rows), if appropriate, and entered data can be controlled using a number of Simple and Formatted control types.
 - **[Bulk Upload] Table:** The [Bulk Upload] Table control allows the agency to provide a predefined spreadsheet template to the submitter for download, population, copy and upload back into the system. The Table control is intended to ease data entry for bulk datasets. Users will download a predefined spreadsheet template, populate this template with the appropriate data, and then copy the raw data from the populated spreadsheet and paste the data in to the table control on the form, where the system will capture the data and present it back to the user for review.

Simple Controls

The Simple controls allow for support of the more basic data display/capture. These controls are described here. Simple control types include the following:

- **Instructions:** The instruction control is used for conveying information to the submitter. This can be used to communicate instructions or to provide context for a particular question, section or the form as a whole. This control also provides the ability to display a horizontal line or a hyperlink, when appropriate.
- **Paragraph:** The Paragraph control is used to capture longer text values such as a detailed descriptions or an explanation.
- **Selection:** Selection controls allow the the submitter to select one or more values from a pre-defined list.
 - **Single Selection:** The Single Selection control is used to capture an individual value selection from a list (i.e., dropdown list).
 - **Multiple Selection:** The Multiple Selection control is used to capture one or more values from a list (i.e., dropdown list).
- **Short Text:** The Short Text control is used to capture a specific text value such as a name or a short descriptor.
- **SSN:** The SSN control is used to capture Social Security Numbers (SSN) and control display (or lack there of) of the values in this field, as appropriate.

Instructions

The instruction control is used for conveying information to the submitter. This can be used to communicate instructions or to provide context for a particular question, section or the form as a whole. This control also provides the ability to display a horizontal line or a hyperlink, when appropriate.


Control Properties in Submission Wizard

Instruction Control

At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque corrupti quos dolores et quas molestias excepturi sint occaecati cupiditate non provident, similique sunt in culpa qui officia deserunt mollitia animi, id est laborum et dolorum fuga. Et harum quidem rerum facilis est et expedita distinctio.

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The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Instruction Text:** The instructions that will be presented to the submitter in the body of the Instruction control.
- **Separator Line:** If checked, a horizontal line will be presented in the Instruction control.
- **Link:** The text that will be displayed for the web link.
- **Control Display:** Control may not display depending on Display Formula value configuration.

Default nForm Agency Users Guide

Control Properties in Form Designer

The following configuration properties are available for the Instruction control:


- **Label:** The label that will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Instruction Text:** The instructions that will be presented to the submitter in the body of the Instruction control.
- **Include Separator:** If checked, a horizontal line will be presented in the Instruction control.
- **Include Link:** If checked the **Link Title** and **Link URL** will be enabled for configuration.
 - **Link Title:** The text that will be displayed for the link.
 - **Link URL:** The fully qualified URL (e.g., <https://www.wikipedia.org>) for the link.
- **Suppress from Print and Download:** Indicates whether the instruction control will be displayed on submission outputs such as print outs or downloads.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.

Paragraph

The Paragraph control is used to capture longer text values such as a detailed descriptions or an explanation.


Control Properties in Submission Wizard

The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Data Entry:** The data entry area for the control. Note: if Read-Only attribute is enabled, the field will be locked and data entry will not be allowed.
- **Control Display:** Control may not display depending on Display Formula value configuration.

Control Properties in Form Designer

The following configuration properties are available for the Paragraph control:

- **Label:** The label that will be presented to the submitter for the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Required?:** Specifies whether the control is required to be entered by the submitter.
 - **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Conceal/Purge Value:** For sensitive information, control value selection can be set the conceal, conceal and purge, or none. If "None" is selected, data will display in standard ways. If "Conceal" is selected, data entered in this control will be concealed from most users. If "Conceal and Purge" is selected, data entered in this control will be concealed from most users and will be purged from the submission, once the submission is finalized.
- **Autopopulation Value:** When a value is selected in this attribute, information will automatically be populated in the control based the respective value found in the submitters users profile (e.g., user name, user email address, etc.).
- **Default Value:** If entered, the controls value will be defaulted to the value entered in this attribute.
- **Maximum Length:** The maximum number of characters that a submitter will be allowed to enter in the control.
- **Height:** The height of the control, as a number of rows that the field can span on the form.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.

Selection

Selection controls allow the the submitter to select one or more values from a pre-defined list. Two options for selection controls are available: Single and Multiple Selection.

Single Selection

The Single Selection control is used to capture an individual value selection from a pre-defined list (i.e., dropdown list).

Control Properties in Submission Wizard

Dropdown Format

Default nForm Agency Users Guide

Single Select


Please Describe

Radio Buttons Format

Single Selection Control

- Option 1
- Option 2
- Option 3
- Other

The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Value List:** Clicking in the control will display the list of pre-defined values. Clicking on a row will add the selected item to the selected item list. One item can be selected.
- **Delete:** The **Delete** icon ('x') can be used to remove an item from the selected item list.
- **Please Describe:** If "Other" is selected, the **Please Describe** field will be displayed and the user will be required to entered a value in this field.
- **Control Display:** Control may not display depending on Display Formula value configuration.

Control Properties in Form Designer

Single Selection Control

Control Definition

Label *

Error/Help Tip *

Read-Only?

Required?

Conditionally Display Control

Conceal/Purge Value

Default Value

Require explanation when "Other" option is selected?

Reason Required

Allow Reason Trigger?

Datasource

Datasource Type *

Options *

Format

Tag

Datasource

Typed In ▼

Options *

Option 1
Option 2
Option 3

Datasource

Dynamic ▼

Dynamic Data Source *

COUNTIES ▼

Datasource

Advanced Table ▼

Unique Key Field *
Enter the **Tag** for the field which is considered the "unique key" for this data source (e.g., "TANK_NUMBER").

The **Unique Key Field** will represent the **Tag** value for the "unique key" in the data source. Referenced attributes/controls can be of type Short Text, Single Selection or any Formatted Control. Backticks are not needed in this field.

Selection Display Value Formula *
Enter the value that will be displayed to the user when they select a value from this data source.

The **Selection Display Value Formula** can be the same "unique key" as was selected in the **Unique Key Field**, or another attribute within the same data source. Use **Tags** (i.e., wrapped in `backticks`) to reference form attributes. These referenced form attributes can be supplemented with literal text as appropriate. Referenced attributes/controls can be of type Short Text, Single Selection or any Formatted Control and must be contained in the same Repeater or Advanced Table as the referenced **Unique Key Field**.

Example

Tank: `TANK_NUMBER` - `TANK_NAME`

Displays the tank number and name in the following format, "Tank: 123 - ABC".

Datasource

Repeating Section

Unique Key Field *

Enter the **Tag** for the field which is considered the "unique key" for this data source (e.g., "TANK_NUMBER").

The **Unique Key Field** will represent the **Tag** value for the "unique key" in the data source. Referenced attributes/controls can be of type Short Text, Single Selection or any Formatted Control. Backticks are not needed in this field.

Selection Display Value Formula *

Enter the value that will be displayed to the user when they select a value from this data source.


The **Selection Display Value Formula** can be the same "unique key" as was selected in the **Unique Key Field**, or another attribute within the same data source. Use **Tags** (i.e., wrapped in `backticks`) to reference form attributes. These referenced form attributes can be supplemented with literal text as appropriate. Referenced attributes/controls can be of type Short Text, Single Selection or any Formatted Control and must be contained in the same Repeater or Advanced Table as the referenced **Unique Key Field**.


Example


Tank: `TANK_NUMBER` - `TANK_NAME`


Displays the tank number and name in the following format, "Tank: 123 - ABC".

The following configuration properties are available for the Single Selection control:

- **Label:** The label that will be presented to the submitter for the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Required?:** Specifies whether the control is required to be entered by the submitter.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Conceal/Purge Value:** For sensitive information, control value selection can be set the conceal, conceal and purge, or none. If "None" is selected, data will display in standard ways. If "Conceal" is selected, data entered in this control will be concealed from most users. If "Conceal and Purge" is selected, data entered in this control will be concealed from most users and will be purged from the submission, once the submission is finalized.
- **Default Value:** If entered, the controls value will be defaulted to the value entered in this attribute.
- **Require explanation when "Other" option is selected?:** If checked, when "Other" is selected by the submitter, a "Please Describe" text field will be activated and required to be entered. Note: "Other" must be an option entered for the data source.
- **Allow Reason Trigger?:** If checked, the **Trigger Label** and **Trigger Match Text** attributes will be enabled. The Reason Trigger feature is one where if a particular text value is matched, a custom reason field will appear. This is often used in a Yes/No situation, where if the user answer "Yes", the will need to provide a reason as to why they answered Yes.
 - **Trigger Label:** The label that will displayed as the "reason" field.
 - **Trigger Match Text:** The text value that will be matched in order to enable/disable the reason field.
- **Data Source:** Specifies the Data Source to be used for the list in the control.
 - **Typed In:** Allows user to enter the list of values to present to the submitter. If selected, an **Options** text field will be displayed and allowing the user to 'Type In' the list of values to be available for the control. Each item in the list will be separated by a carriage return.
 - **Dynamic:** Allows user to select a pre-configured data source to populate the controls list of values. These data sources are stored in the LOOKUP and LOOKUP_VALUE tables in the database. If selected, **Dynamic Data Source** dropdown field displays allowing for selection of desired list of values. See system administrator for additional details.
 - **Repeating Section or Advanced Table:** Allows user to select a Repeating Section or Advanced Table as the data source. The user will be able to specify the unique control to link to for linking purposes (not necessarily displayed to the user) and then a formula can be entered to specify the text to display to the user in the selectable list. If selected, the **Control tag for Selected Value (saved value)** and **Display Formula for Selection** attributes will display for configuration.
 - **Unique Key Field:** Enter the Control Tag for the 'key' field in the data source. This will represent the primary unique identifier that will be saved with any linked selection.

 Tag values do not need to be contained in tick marks (i.e. ` `) in this field as only a single Tag mark can be entered.
 - **Selection Display Value Formula:** Provide a formula for specifying the text to display for each item in the list. A great deal of flexibility has been provided with this formula which supports very simple and very complex derivations. For additional details see the **Calculation Based Fees (Section 10.2)** subtopic in the **Form Details (Section 10.2)** topic.

 The display formula can be as simple as the Tag for the key control contained in tick marks (e.g., `KeyControl`).

 Any references a Tag value must be contained within ticks (i.e., ` `). Please note that the tick (i.e., ` `) differs from the single quote (i.e., ` `).
- **Format:** The format in which the control selections will display (e.g., Dropdown or Radio Buttons).
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.

Multiple Selection

The Multiple Selection control is used to capture one or more values from a pre-defined list (i.e., dropdown list).

Control Properties in Submission Wizard

Dropdown Multi-Select List Format

Multiple Select Field

Other

Option 1

Option 2

Please Describe

A description of another value.


Checkbox Format

Multiple Selection Control

Option 1 Option 2

Option 3

The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Value List:** Clicking in the control will display the list of pre-defined values. Clicking on a row will add the selected item to the selected item list. Many items can be selected.
- **Delete:** The **Delete** icon ('x') can be used to remove an item from the selected item list.
- **Please Describe:** If "Other" is selected, the **Please Describe** field will be displayed and the user will be required to enter a value in this field.
- **Control Display:** Control may not display depending on Display Formula value configuration.

Control Properties in Form Designer

Multiple Selection Control
✕

Control Definition

Label*

Error/Help Tip*

Read-Only?

Required?

Conditionally Display Control

Conceal/Purge Value

Require explanation when "Other" option is selected?

Datasource

Datasource Type*

Options*

Format

Tag

Multiple Selection

Datasource

Typed In

Options *

Option 1
Option 2
Option 3

Datasource

Advanced Table

Unique Key Field *

Enter the **Tag** for the field which is considered the "unique key" for this data source (e.g., "TANK_NUMBER").

The **Unique Key Field** will represent the **Tag** value for the "unique key" in the data source. Referenced attributes/controls can be of type Short Text, Single Selection or any Formatted Control. Backticks are not needed in this field.

Selection Display Value Formula *

Enter the value that will be displayed to the user when they select a value from this data source.

The **Selection Display Value Formula** can be the same "unique key" as was selected in the **Unique Key Field**, or another attribute within the same data source. Use **Tags** (i.e., wrapped in `backticks`) to reference form attributes. These referenced form attributes can be supplemented with literal text as appropriate. Referenced attributes/controls can be of type Short Text, Single Selection or any Formatted Control and must be contained in the same Repeater or Advanced Table as the referenced **Unique Key Field**.

Example

Tank: `TANK_NUMBER` - `TANK_NAME`

Displays the tank number and name in the following format, "Tank: 123 - ABC".

Datasource

Repeating Section

Unique Key Field *

Enter the **Tag** for the field which is considered the "unique key" for this data source (e.g., "TANK_NUMBER").

The **Unique Key Field** will represent the **Tag** value for the "unique key" in the data source. Referenced attributes/controls can be of type Short Text, Single Selection or any Formatted Control. Backticks are not needed in this field.

Selection Display Value Formula *

Enter the value that will be displayed to the user when they select a value from this data source.


The **Selection Display Value Formula** can be the same "unique key" as was selected in the **Unique Key Field**, or another attribute within the same data source. Use **Tags** (i.e., wrapped in `backticks`) to reference form attributes. These referenced form attributes can be supplemented with literal text as appropriate. Referenced attributes/controls can be of type Short Text, Single Selection or any Formatted Control and must be contained in the same Repeater or Advanced Table as the referenced **Unique Key Field**.

Example

Tank: `TANK_NUMBER` - `TANK_NAME`

Displays the tank number and name in the following format, "Tank: 123 - ABC".

The following configuration properties are available for the Multiple Selection control:


- **Label:** The label that will be presented to the submitter for the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Read-Only?:** If set to "No", the control will be editable. If set to "Yes", the control will be displayed in a read-only mode. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Required?:** Specifies whether the control is required to be entered by the submitter.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the

Conditionally Display Control checkbox. When checked, the **Display Formula** field will be enabled for configuration.


- **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Conceal/Purge Value:** For sensitive information, control value selection can be set the conceal, conceal and purge, or none. If "None" is selected, data will display in standard ways. If "Conceal" is selected, data entered in this control will be concealed from most users. If "Conceal and Purge" is selected, data entered in this control will be concealed from most users and will be purged from the submission, once the submission is finalized.
- **Require explanation when "Other" option is selected?:** If checked, when "Other" is selected by the submitter, a "Please Describe" text field will be activated and required to be entered. Note: "Other" must be an option entered for the data source.
- **Data Source:** Specifies the Data Source to be used for the list in the control.


- **Typed In:** Allows user to enter the list of values to present to the submitter. If selected, an **Options** text field will be displayed and allowing the user to 'Type In' the list of values to be available for the control. Each item in the list will be separated by a carriage return.
- **Dynamic:** Allows user to select a pre-configured data source to populate the controls list of values. These data sources are stored in the LOOKUP and LOOKUP_VALUE tables in the database. If selected, **Dynamic Data Source** dropdown field displays allowing for selection of desired list of values. See system administrator for additional details.
- **Repeating Section or Advanced Table:** Allows user to select a Repeating Section or Advanced Table as the data source. The user will be able to specify the unique control to link to for linking purposes (not necessarily displayed to the user) and then a formula can be entered to specify the text to display to the user in the selectable list. If selected, the **Control tag for Selected Value (saved value)** and **Display Formula for Selection** attributes will display for configuration.

- **Unique Key Field:** Enter the Control Tag for the 'key' field in the data source. This will represent the primary unique identifier that will be saved with any linked selection.

 Tag values do not need to be contained in tick marks (i.e. ` `) in this field as only a single Tag mark can be entered.

- **Selection Display Value Formula:** Provide a formula for specifying the text to display for each item in the list. A great deal of flexibility has been provided with this formula which supports very simple and very complex derivations. For additional details see the **Calculation Based Fees (Section 10.2)** subtopic in the **Form Details (Section 10.2)** topic.

 The display formula can be as simple as the Tag for the key control contained in tick marks (e.g., `KeyControl`).

 Any references a Tag value must be contained within ticks (i.e., ` `). Please note that the tick (i.e., ` `) differs from the single quote (i.e., ` `).

- **Format:** The format in which the control selections will display (e.g., Dropdown Multi-Select or Checkbox's).
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.

Short Text


The Short Text control is used to capture a specific text value such as a name or a short descriptor.

Control Properties in Submission Wizard

Short Text Control

Text


The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Data Entry:** The data entry area for the control. If configured, an auto-complete feature will assist data entry/selection. If some configurations, data entered will need to be available in the list. Note: if Read-Only attribute is enabled, the field will be locked and data entry will not be allowed.
- **Control Display:** Control may not display depending on Display Formula value configuration.

Control Properties in Form Design

The screenshot shows a configuration window for a 'Short Text Control'. It includes fields for 'Label', 'Error/Help Tip', 'Read-Only?' (set to 'No'), 'Required?' (unchecked), 'Conditionally Display Control?' (unchecked), 'Conceal/Purge Value' (set to 'None'), 'Autopopulation Value' (set to 'None'), 'Default Value' (empty), 'Maximum Length' (set to '100'), 'Enforced Format' (Validation Type set to 'None'), 'Auto-complete' (Data Source empty, Number of Matches Displayed empty, Only allow lookup values? unchecked), and a 'Tag' field containing 'SHORTTEXT_TAG'. The window has 'OK' and 'Cancel' buttons at the bottom.

The following configuration properties are available for the Short Text control:

- **Label:** The label that will be presented to the submitter for the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Required?:** Specifies whether the control is required to be entered by the submitter.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Conceal/Purge Value:** For sensitive information, control value selection can be set the conceal, conceal and purge, or none. If "None" is selected, data will display in standard ways. If "Conceal" is selected, data entered in this control will be concealed from most users. If "Conceal and Purge" is selected, data entered in this control will be concealed from most users and will be purged from the submission, once the submission is finalized.
- **Autopopulation Value:** When a value is selected in this attribute, information will automatically be populated in the control based the respective value found in the submitters users profile (e.g., user name, user email address, etc.).
- **Default Value:** If entered, the controls value will be defaulted to the value entered in this attribute.
- **Maximum Length:** The maximum number of characters that a submitter will be allowed to enter in the control.
- **Enforcement Format - Validation Type:** Specifies the type of value that will be entered in this field. This format will be validated to this selected format during data entry. Custom validations can be established, for situations where this is required, by using a standard validation format using Regular Expressions. Contact a system administrator if this is required.
- **Auto-Complete:** The auto-complete features activates a suggestion dropdown based on text entered in to the field.
 - **Data Source:** Specifies the Data Source for the list. All available data sources will be defined in the LOOKUP table in the database.
 - **Number of Matches Displayed:** Specifies the maximum number of suggestions/matches to be displayed in the dropdown list when valid text is entered.
 - **Only Allow Lookup Values?:** If checked, the submitter can only select/enter values found in the available list.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.

Formatted Controls

The Formatted controls allow a user to capture data of a particular format. These controls are described here. Formatted control types include the following:

- **Date:** Used to enforce an entered value is a valid date (e.g., 1/1/2012). This control provides a date picker utility for eased date selection.
- **Email:** Used to enforce an entered value is a valid email address (e.g., me@mydomain.org).
- **Number:** Used to enforce an entered value is numeric (e.g., 1001). This control provides up/down buttons for incrementing the numeric value up and down.
- **Phone:** Used to enforce an entered value adheres to standard phone number format (e.g., 555-555-5555 x555).
- **Time:** Used to enforce an entered value is a valid time (e.g., 12:00 am). This control provides a time picker utility for eased time selection.
- **URL:** Used to enforce an entered value adheres to standard URL format (e.g., <https://www.mysite.org>).


Date

The Date control is used to enforce an entered value is a valid date (e.g., 1/1/2012). This control provides a date picker utility for eased date selection.

Control Properties in Submission Wizard


Date Control

The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Data Entry:** The data entry area for the control. The value entered will need to be entered in a valid date format. Note: if Read-Only attribute is enabled, the field will be locked and data entry will not be allowed.
- **Date Picker:** The **Date Picker** icon can be clicked to present the user with the **Date Picker** utility. Note: if Read-Only attribute is enabled, the field will be locked and data entry will not be allowed.
 - Clicking a date value will enter the selected date in to the control and will close the **Date Picker**.
 - Clicking the < arrow will navigate to the previous month.
 - Clicking the > arrow will navigate to the next month.
 - Clicking the current month/year value at the top of the **Date Picker** will open the month selector.
 - Clicking **Clear** will clear any entered date in to the control and will close the **Date Picker**.
 - Clicking **Done** will close the **Date Picker**.
- **Control Display:** Control may not display depending on Display Formula value configuration.

Control Properties in Form Design

The following configuration properties are available for the control:

- **Label:** The label that will be presented to the submitter for the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Required?:** Specifies whether the control is required to be entered by the submitter.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Conceal/Purge Value:** For sensitive information, control value selection can be set the conceal, conceal and purge, or none. If "None" is selected, data will display in standard ways. If "Conceal" is selected, data entered in this control will be concealed from most users. If "Conceal and Purge" is selected, data entered in this control will be concealed from most users and will be purged from the submission, once the submission is finalized.
- **Autopopulation Value:** When a value is selected in this attribute, information will automatically be populated in the control based the respective value found in the submitters users profile (e.g., user name, user email address, etc.).
- **Default Value:** If entered, the controls value will be defaulted to the value entered in this attribute.
- **Enforcement Format - Validation Type:** Specifies the type of value that will be entered in this field. This format will be validated to this selected format during data entry. This field is not editable.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.


Email

The Email control is used to enforce an entered value is a valid email address (e.g., me@mydomain.org).

Control Properties in Submission Wizard


Email Control

The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Data Entry:** The data entry area for the control. The value entered will need to be entered in a valid email format. Note: if Read-Only attribute is enabled, the field will be locked and data entry will not be allowed.
- **Control Display:** Control may not display depending on Display Formula value configuration.

Control Properties in Form Design

The following configuration properties are available for the control:

- **Label:** The label that will be presented to the submitter for the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Required?:** Specifies whether the control is required to be entered by the submitter.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Conceal/Purge Value:** For sensitive information, control value selection can be set the conceal, conceal and purge, or none. If "None" is selected, data will display in standard ways. If "Conceal" is selected, data entered in this control will be concealed from most users. If "Conceal and Purge" is selected, data entered in this control will be concealed from most users and will be purged from the submission, once the submission is finalized.
- **Autopopulation Value:** When a value is selected in this attribute, information will automatically be populated in the control based the respective value found in the submitters users profile (e.g., user name, user email address, etc.).
- **Default Value:** If entered, the controls value will be defaulted to the value entered in this attribute.
- **Maximum Length:** The maximum number of characters that a submitter will be allowed to enter in the control.
- **Enforcement Format - Validation Type:** Specifies the type of value that will be entered in this field. This format will be validated to this selected format during data entry. This field is not editable.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.

Number

The Number control is used to enforce an entered value is numeric (e.g., 1001). This control provides up/down buttons for incrementing the numeric value up and down.


Control Properties in Submission Wizard

Number Control

The following properties are available for display/data entry with this control in the Submission Wizard:


- **Label:** The label for the control will be displayed to the submitter.

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- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Data Entry:** The data entry area for the control. The value entered must be numeric. Note: if Read-Only attribute is enabled, the field will be locked and data entry will not be allowed.
- **Control Display:** Control may not display depending on Display Formula value configuration.

Control Properties in Form Design

The following configuration properties are available for the control:

- **Label:** The label that will be presented to the submitter for the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Required?:** Specifies whether the control is required to be entered by the submitter.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Conceal/Purge Value:** For sensitive information, control value selection can be set the conceal, conceal and purge, or none. If "None" is selected, data will display in standard ways. If "Conceal" is selected, data entered in this control will be concealed from most users. If "Conceal and Purge" is selected, data entered in this control will be concealed from most users and will be purged from the submission, once the submission is finalized. **Read-Only?:** If checked, the control will be presented for display purposes only. The user will not be able to change this value.
- **Autopopulation Value:** When a value is selected in this attribute, information will automatically be populated in the control based the respective value found in the submitters users profile (e.g., user name, user email address, etc.).
- **Default Value:** If entered, the controls value will be defaulted to the value entered in this attribute.
- **Maximum Length:** The maximum number of characters that a submitter will be allowed to enter in the control.
- **Enforcement Format**
 - **Validation Type:** Specifies the type of value that will be entered in this field. This format will be validated to this selected format during data entry. This field is not editable.
 - **Decimal Places:** Specifies the number of decimal places with will be enterable/displayed for the value.
 - **Use 1000 Separator (,)?:** If checked, a comma will be displayed to separate 1000's (e.g., 1,343,200).
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.


Phone

The Phone control is used to enforce an entered value adheres to standard phone number format (e.g., 555-555-5555 x555).

Control Properties in Submission Wizard

Phone Control


The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Data Entry:** The data entry area for the control. The value entered must be a valid phone number. Note: if Read-Only attribute is enabled, the field will be locked and data entry will not be allowed.
- **Control Display:** Control may not display depending on Display Formula value configuration.

Control Properties in Form Design

Phone Control ✕

Control Definition

Label* 

Error/Help Tip*

Read-Only?

Required?

Conditionally Display Control?

Conceal/Purge Value

Autopopulation Value

Default Value


Enforced Format

Validation Type

*Select custom validation type to enter a custom regular expression validator.

Tag

The following configuration properties are available for the control:

- **Label:** The label that will be presented to the submitter for the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Required?:** Specifies whether the control is required to be entered by the submitter.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Conceal/Purge Value:** For sensitive information, control value selection can be set the conceal, conceal and purge, or none. If "None" is selected, data will display in standard ways. If "Conceal" is selected, data entered in this control will be concealed from most users. If "Conceal and Purge" is selected, data entered in this control will be concealed from most users and will be purged from the submission, once the submission is finalized.
- **Autopopulation Value:** When a value is selected in this attribute, information will automatically be populated in the control based the respective value found in the submitters users profile (e.g., user name, user email address, etc.).
- **Default Value:** If entered, the controls value will be defaulted to the value entered in this attribute.
- **Enforcement Format - Validation Type:** Specifies the type of value that will be entered in this field. This format will be validated to this selected format during data entry. This field is not editable.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.

Time


The Time control is used to enforce an entered value is a valid time (e.g., 12:00 am). This control provides a time picker utility for eased time selection.

Control Properties in Submission Wizard

Time Control


HH : MM AM

The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Data Entry:** The data entry area for the control. Note: if Read-Only attribute is enabled, the field will be locked and data entry will not be allowed.
 - **Hours:** The data entry area for the hours value of the control. The value entered must be a valid hour value (1-12). Clicking in this column and then using the up/down arrows on the keyboard will adjust the hour value from the current time.
 - **Minutes:** The data entry area for the minutes value of the control. The value entered must be a valid minute value (00-59). Clicking in this column and then using the up/down arrows on the keyboard will adjust the minute value from the current time.
 - **AM/PM:** The data entry area for the AM/PM value of the control. The value entered must be a valid AM/PM value (AM or PM). Clicking in this column will switch the values.
- **Control Display:** Control may not display depending on Display Formula value configuration.

Control Properties in Form Design

The following configuration properties are available for the control:

- **Label:** The label that will be presented to the submitter for the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon (). This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Required?:** Specifies whether the control is required to be entered by the submitter.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Conceal/Purge Value:** For sensitive information, control value selection can be set the conceal, conceal and purge, or none. If "None" is selected, data will display in standard ways. If "Conceal" is selected, data entered in this control will be concealed from most users. If "Conceal and Purge" is selected, data entered in this control will be concealed from most users and will be purged from the submission, once the submission is finalized.
- **Autopopulation Value:** When a value is selected in this attribute, information will automatically be populated in the control based the respective value found in the submitters users profile (e.g., user name, user email address, etc.).
- **Default Value:** If entered, the controls value will be defaulted to the value entered in this attribute.

- **Enforcement Format - Validation Type:** Specifies the type of value that will be entered in this field. This format will be validated to this selected format during data entry. This field is not editable.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.


URL

The URL control is used to enforce an entered value adheres to standard URL format (e.g., <https://www.mysite.org>).

Control Properties in Submission Wizard


URL Control

The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Data Entry:** The data entry area for the control. The value entered must be a valid fully qualified URL address (e.g., <https://www.myorg.org>). Note: if Read-Only attribute is enabled, the field will be locked and data entry will not be allowed.
- **Control Display:** Control may not display depending on Display Formula value configuration.

Control Properties in Form Design

The following configuration properties are available for the control:

- **Label:** The label that will be presented to the submitter for the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Required?:** Specifies whether the control is required to be entered by the submitter.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Conceal/Purge Value:** For sensitive information, control value selection can be set the conceal, conceal and purge, or none. If "None" is selected, data will display in standard ways. If "Conceal" is selected, data entered in this control will be concealed from most users. If "Conceal and Purge" is selected, data entered in this control will be concealed from most users and will be purged from the submission, once the submission is finalized.

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- **Autopopulation Value:** When a value is selected in this attribute, information will automatically be populated in the control based the respective value found in the submitters users profile (e.g., user name, user email address, etc.).
- **Default Value:** If entered, the controls value will be defaulted to the value entered in this attribute.
- **Maximum Length:** The maximum number of characters that a submitter will be allowed to enter in the control.
- **Enforcement Format - Validation Type:** Specifies the type of value that will be entered in this field. This format will be validated to this selected format during data entry. This field is not editable.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.

Advanced Controls


The Advanced controls allow for support of the more advanced data capture capabilities. These controls are described here. Advanced control types include the following:

- **Address:** The Address control captures a standard address such as submitters address, work site.
- **Attachment:** The Attachment control allows for capture/upload of electronic document(s).
- **Calculated:** The Calculated control allows for calculated of a value based on a formula. The calculated value can be derived based on values found in other controls on the form.
- **Contact:** The Contact control allows for capture of detailed information for a contact person, including attributes such as a name, title, company, phone numbers, email, and address, etc.
- **Hidden Text:** The Hidden Text control allows for data to be included in a form, but hidden, when appropriate, for storing data used by the import/export processes, that may have no meaning to the submitter.
- **Location:** The Location control allows for the capture of a latitude and longitude for a particular spatial point/location. Users can search for a location by an address, entry of a latitude and longitude decimal value or use of a Google map to point to and identify a specific location.
- **Name:** The Name control captures a Name and Title value. This can be used to capture the name/title of a owner, operator or project manager.
- **Tables:** Table controls allow for the capture of a table of data from the submitter. The Table controls currently supported, include:
 - **Advanced Table:** The Advanced Table control allows for the capture and/or display of data in a highly formatted table structure. Users can interact with the table (e.g., adding/removing rows), if appropriate, and entered data can be controlled using a number of Simple and Formatted control types.
 - **[Bulk Upload] Table:** The [Bulk Upload] Table control allows the agency to provide a predefined spreadsheet template to the submitter for download, population, copy and upload back into the system. The Table control is intended to ease data entry for bulk datasets. Users will download a predefined spreadsheet template, populate this template with the appropriate data, and then copy the raw data from the populated spreadsheet and paste the data in to the table control on the form, where the system will capture the data and present it back to the user for review.

Address

The Address control is used to capture a standard address such as submitters address, work site.

Control Properties in Submission Wizard

Address Control 

Address Line 1

Address Line 2


Location Description

City State/Area

County Postal Code Country


VALIDATE ADDRESS

The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Data Entry:** The data entry area for the control. Note: if Read-Only attribute is enabled, the fields will be locked and data entry will not be allowed.
 - **Address Line 1:** The street address line for the address.
 - **Address Line 2:** The secondary address line for the address (e.g., BLDG #, APT #, STE #)
 - **Location Description:** A supplementary description for the address (e.g., 1/4 mile past mile post 214).
 - **City:** The city for the address.
 - **State/Area:** The state for the address.
 - **County:** The county the address resides within.
 - **Postal Code:** The postal code for the address.
 - **Country:** The country for the address.
- **Validate Address:** When clicked, the address entered will be verified against a domestic address service. If a improved address match is found, it will be presented for selection.
- **Control Display:** Control may not display depending on Display Formula value configuration.


Control Properties in Form Design

The following configuration properties are available for the control:

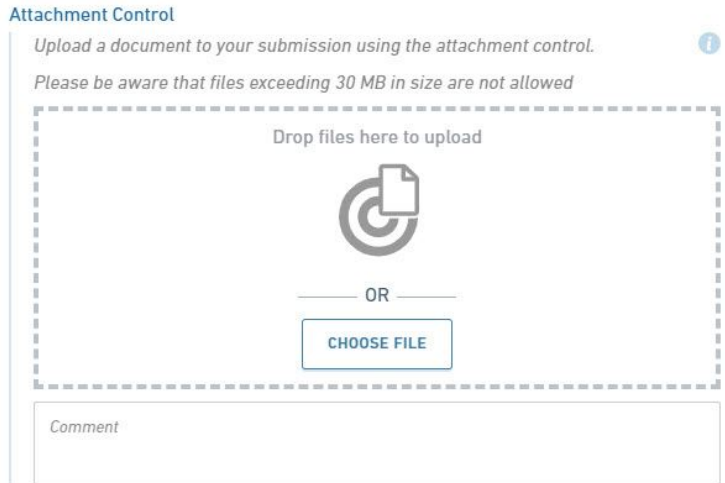
- **Label:** The label that will be presented to the submitter for the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Autopopulate Address?:** If checked, the address will automatically be populated in the control based the address value found in the submitters users profile.
- **Required?:** Specifies whether the control is required to be entered by the submitter.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Conceal/Purge Value:** For sensitive information, control value selection can be set the conceal, conceal and purge, or none. If "None" is selected, data will display in standard ways. If "Conceal" is selected, data entered in this control will be concealed from most users. If "Conceal and Purge" is selected, data entered in this control will be concealed from most users and will be purged from the submission, once the submission is finalized.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.
- **Additional Fields:**
 - **Location Description:** If checked, the Location Description field will be enabled, allowing for entry of a location description (e.g., 1/4 beyond mile post 214)
 - **Country:** If checked, the Country field will be enabled.
 - **Country Required:** If checked, the Country field will be required.
 - **County:** If checked, the County field will be enabled.
 - **County Required:** If checked, the County field will be required.
 - **Require County if Country is provided (US Only):** If checked, the County field will be required if the Country field is populated (and equal to United States).
- **Validation:**
 - **Allow partial addresses:** If checked, partial addresses will be accepted (e.g., city, state and zip code with no street address are accepted, etc.).

Attachment

The Attachment control allows for capture/upload of electronic document(s)/file(s). Attachments can be uploaded using the Choose File button and selecting the file or by dragging and dropping the electronic document on the "Drop files here to upload" area. An electronic document/file can be deleted by clicking the 'x' button to the right of the electronic document/file name.

 Large files can be accepted by the system. The max file size is configurable by a system administrator.

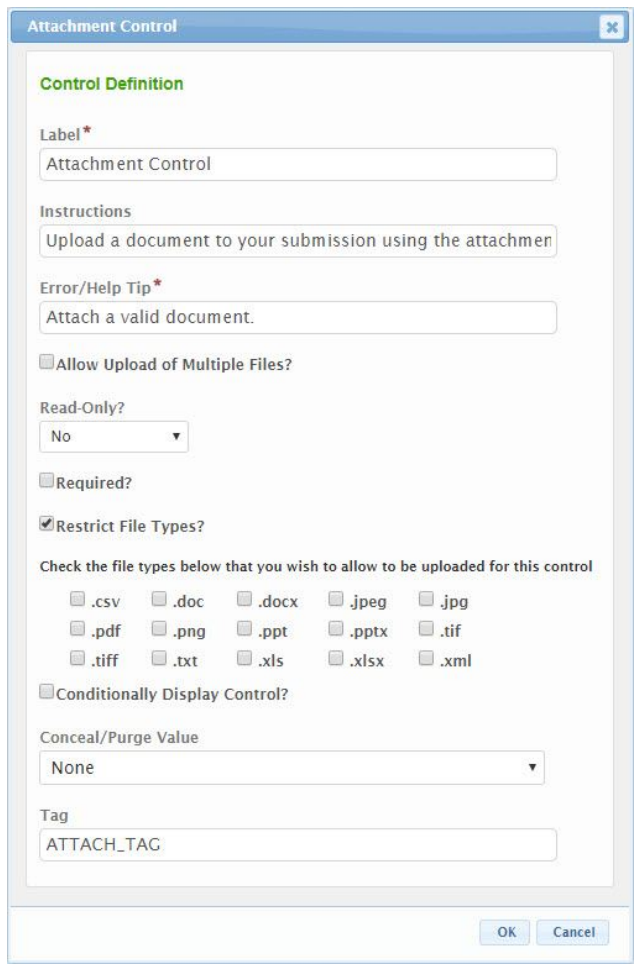
Control Properties in Submission Wizard




The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
 - **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon (i) for the control.
 - **Data Entry:** The data entry area for the control. Files will be virus scanned on upload.
 - **Drop files here to upload:** Drag and drop electronic document files to this area to initiate a electronic document/file upload.
 - **Choose File:** Click this button to open the file browser and allow for selection of the electronic document/file.
- Any uploaded files will be scanned for viruses prior to being saved.
- **File List:** A list of all uploaded electronic documents/files.
 - **Confidential:** If configured to be enabled, the submitter will have the ability to mark an electronic document/file as confidential using this checkbox, in the case of sensitive information. Marking a electronic document/file as confidential will encrypt the information and limit access to who will be able to view the electronic document/file.
 - **Justification:** If the submitter marks the electronic document/file as confidential, they will be required to enter justification text.
 - **Comment:** An area for the submitter to provide additional comments on the electronic documents/files.
 - **Control Display:** Control may not display depending on Display Formula value configuration.

Control Properties in Form Design



The following configuration properties are available for the control:

- **Label:** The label that will be presented to the submitter for the control.
- **Instructions:** Any pertinent instructions for the submitter with regards to the electronic document(s) for upload.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Allow Upload of Multiple Files?:** If checked, the system will allow multiple documents/files to be uploaded to this control.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Required?:** Specifies whether the control is required to be entered by the submitter.
- **Restrict File Types?:** Select/check the file types that will be accepted for this control in the Submission Wizard.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Conceal/Purge Value:** For sensitive information, control value selection can be set the conceal, conceal and purge, or none. If "None" is selected, data will display in standard ways. If "Conceal" is selected, data entered in this control will be concealed from most users. If "Conceal and Purge" is selected, data entered in this control will be concealed from most users and will be purged from the submission, once the submission is finalized.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.

Calculated


The Calculated control allows for calculated of a value based on a formula. The calculated value can be derived based on values found in other controls on the form.

Control Properties in Submission Wizard

Calculated Value Control


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The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Data Display:** The area will display the formulated value(s) for the control.

Control Properties in Form Design

The following configuration properties are available for the control:

- **Label:** The label that will be presented to the submitter for the control.
- **Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Hidden?:** If checked, the system will hide the display of this control from the submitter.
- **Calculated Value Formula:** The formula used to determine the value(s) that will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Enforcement Format**
 - **Validation Type:** Specifies the type of value that will be entered in this field. This format will be validated to this selected format during data entry. This field is not editable.
 - **Decimal Places:** Specifies the number of decimal places with will be enterable/displayed for the value.
 - **Use 1000 Separator (,)?:** If checked, a comma will be displayed to separate 1000's (e.g., 1,343,200).
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.

Contact

The Contact control allows for capture of detailed information for a contact person, including attributes such as a name, title, company, phone numbers, email, and address, etc.

Control Properties in Submission Wizard

Contact

Contact Auto-fill

CONTACT

Prefix: Dr. First Name: Megan

Middle Name: Sarah Last Name: Parker

Title: Chief Surgeon

Company: St. Paul's Hospital

PHONE

Phone Type: Business Phone Number: 555-321-1234 Ext.:

Email: megan.parker@stpaul.com

ADDRESS

Address Line 1: 4386 Southwest Macadam Avenue

Address Line 2:


Location Description:

City: Portland State/Area: OR Postal Code: 97239

County: Multnomah Country: United States

VALIDATE ADDRESS

The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Data Entry:** The data entry area for the control. Note: if Read-Only attribute is enabled, the fields will be locked and data entry will not be allowed.
 - **Contact Auto-Fill:** Provides the ability for the user to auto-fill the contact control based on data entered in other areas of the form, or via auto-fill dataset. Note: this value is only available if configured to be enabled.
 - **Contact**
 - **Prefix:** The prefix for the contacts name (e.g., Dr., Ms., etc.).
 - **First Name:** The first name for the contact.
 - **Last Name:** The last name for the contact.
 - **Title:** The title of the contact.
 - **Company Name:** The company which the contact represents.
 - **Email:** The email address for the contact.
 - **Phone:** The phone number for the contact.
 - **Ext.:** The extension for the phone number for the contact.
 - **Fax:** The fax number for the contact.
 - **Address:**
 - **Address Line 1:** The street address line for the address.
 - **Address Line 2:** The secondary address line for the address (e.g., BLDG #, APT #, STE #).
 - **Location Description:** A supplementary description for the address (e.g., 1/4 mile past mile post 214).
 - **City:** The city for the address.
 - **State/Area:** The state for the address.
 - **County:** The county for the address, if applicable.
 - **Postal Code:** The postal code for the address.
 - **Country:** The country for the address.
 - **Validate Address:** When clicked, the address entered will be verified against a domestic address service. If a improved address match is found, it will be presented for selection.
 - **Control Display:** Control may not display depending on Display Formula value configuration.

Control Properties in Form Design

Contact Control
✕

Control Definition

Label*

Error/Help Tip:*

Read-Only?

Autopopulate Contact and Address

Conditionally Display Control?

Conceal/Purge Value

Tag

Components

Main Contact Info

Contact Group Label

This sub-label applies to the field group made up of the Name, Title, and Organization/Company Name fields.

Display Individual Name Required

Additional Fields to Display

Prefix Required

Middle Name Required

Display Title Required

Display Organization/Company Name Required

Organization/Company Name Custom Label

Display Phone At Least 1 Required

Phone Number Group Label

This sub-label applies to the field group made up of all phone number fields.

Multiple phone numbers allowed

Allowed phone number types

- Main
- Business
- Home
- Mobile
- Other

Display Fax Required

Display Email Address Required

Display Address Required


Address Group Label

This sub-label applies to the field group made up of all address/location fields.

Additional Fields



The following configuration properties are available for the control:

- **Header:** The label that will be presented to the submitter in the header of the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Autopopulate Contact and Address?:** If checked, the contact and address fields will automatically be populated in the control based the information found in the submitters users profile.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Conceal/Purge Value:** For sensitive information, control value selection can be set the conceal, conceal and purge, or none. If "None" is selected, data will display in standard ways. If "Conceal" is selected, data entered in this control will be concealed from most users. If "Conceal and Purge" is selected, data entered in this control will be concealed from most users and will be purged from the submission, once the submission is finalized.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.
- **Components:**
 - **Main Contact Info:**
 - **Contact Group Label:** The label displayed above the Contact information area in the control. If left blank, no label will displayed in this area.
 - **Individual:**
 - **Display Individual Name:** If checked, the Individual First Name and Last Name fields will be displayed.
 - **Individual Name Required:** If checked, the individual First Name and Last Name fields will be required to be entered by the submitter.
 - **Prefix:** If checked, the Prefix field will be displayed.
 - **Prefix Required:** If checked, the Prefix field will be required to be entered by the submitter.
 - **Middle Name:** If checked, the Middle Name field will be displayed.
 - **Middle Name Required:** If checked, the Middle Name field will be required to be entered by the submitter.
 - **Title:**
 - **Display Title:** If checked, the Title field will be displayed.
 - **Title Required:** If checked, the Title field will be required to be entered by the submitter.
 - **Organization/Company Name**
 - **Display Organization/Company Name:** If checked, the **Organization/Company Name** field will be displayed.
 - **Organization/Company Name Required:** If checked, the **Organization/Company Name** field will be required to be entered by the submitter.
 - **Organization/Company Name Custom Label:** If a value is entered in this field, this will be the label presented for the Organization/Company Name field. If no value is provided, Organization Name will be displayed.
 - **Phone:**
 - **Display Phone:** If checked, the Phone fields will be displayed.
 - **At Least 1 Required:** If checked, at least one phone number will be required to be provided by the submitter.
 - **Phone Number Group Label:** The label displayed above the Phones area in the control. If left blank, no label will displayed in this area.
 - **Multiple phone numbers allowed:** If checked, multiple phone number can be provided by the submitter.
 - **Allowed phone number types:**
 - **Main:** If checked, the user will be allowed to enter a main phone number.
 - **Business:** If checked, the user will be allowed to enter a business phone number.
 - **Home:** If checked, the user will be allowed to enter a home phone number.
 - **Mobile:** If checked, the user will be allowed to enter a mobile phone number.
 - **Other:** If checked, the user will be allowed to enter an other type of phone number.
 - **Fax:**
 - **Display Fax:** If checked, the Fax field will be displayed.
 - **Fax Required:** If checked, the Fax field will be required to be entered by the submitter.
 - **Email Address:**
 - **Display Email Address:** If checked, the Email field will be displayed.
 - **Email Address Required:** If checked, the Email field will be required to be entered by the submitter.
 - **Address:**
 - **Display Address:** If checked, the address fields (e.g., Address Line 1, Address Line 2, City, State/Area, Postal Code) will be displayed.
 - **Address Required:** If checked, an address will be required to be entered by the submitter.
 - **Address Group Label:** The label displayed above the address information area in the control. If left blank, no label will displayed in this area.
 - **Location Description:** If checked, the Location Description field will be enabled, allowing for entry of a location description (e.g., 1/4 beyond mile post 214).
 - **Country:** If checked, the Country field will be enabled.
 - **Country Required:** If checked, the Country field will be required.
 - **County:** If checked, the County field will be enabled.
 - **County Required:** If checked, the County field will be required.

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- **Require County if Country is provided (US Only):** If checked, the County field will be required if the Country field is populated (and equal to United States).
- **Validation:**
 - **Allow partial addresses:** If checked, partial addresses will be accepted (e.g., city, state and zip code with no street address are accepted, etc.).

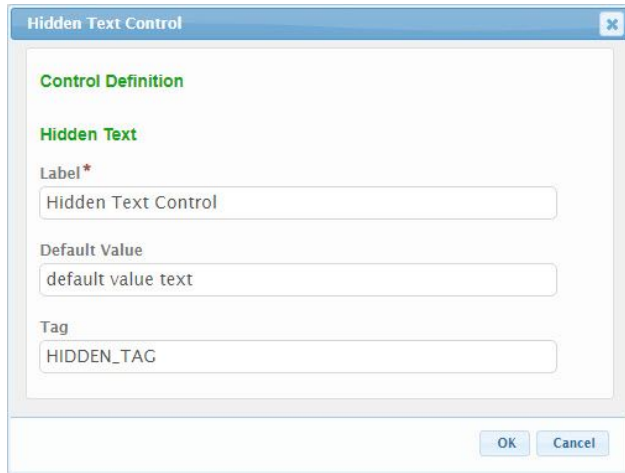
Hidden Text

The Hidden Text control allows for data to be included in a form, but hidden, when appropriate, for storing data used by the import/export processes, that may have no meaning to the submitter.

Control Properties in Submission Wizard

No properties are available for display/data entry with this control in the Submission Wizard as it is hidden from the submitters view.

Control Properties in Form Design



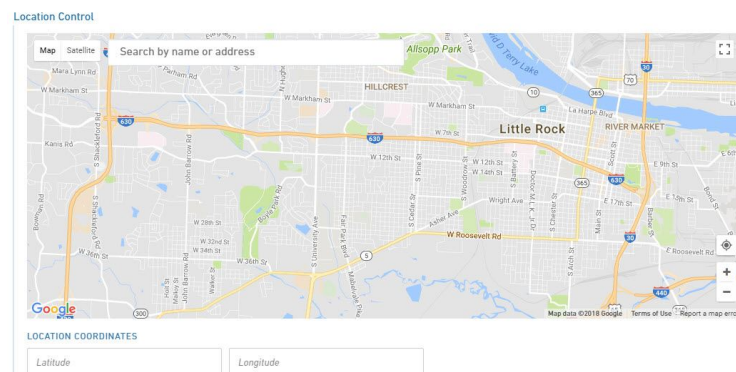
The following configuration properties are available for the control:

- **Label:** The label that will identify the control in the form designer.
- **Default Value:** A default value that should be assigned to the control, if appropriate.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.


Location

The Location control allows for the capture of a latitude and longitude for a particular spatial point/location. Users can search for a location by an address, entry of a latitude and longitude decimal value or use of a Google map to point to and identify a specific location.

Control Properties in Submission Wizard



The latitude and longitude can be identified using one of the following methods:


- **Address:** A location can be identified by entering the physical address of the location (e.g., "919 Ala Moana Blvd., Honolulu, Hawaii 96814") in the **Search by name or address** text field on the top of the map.
- **Map:** The map marker can be moved on the map to the appropriate location by clicking on the map and/or dragging the marker to the appropriate identified location. Use the zoom and pan controls on the bottom right to navigate the map. The closer you zoom in to a location, the more accurate the identified location.
- **My Location:** Some browsers have the ability to share the user's exact location (when provided access to such information). When supported and authorized, the user can click on the my location button () to pinpoint their exact location on the map. Note: you will be required (when/asked) to share your location to your browser for this feature to work properly.
- **Direct Entry:** In the search box, type your coordinates. Here are examples of formats that work:
 - Degrees, minutes, and seconds (DMS): 41°24'12.2"N 2°10'26.5"E
 - Degrees and decimal minutes (DMM): 41 24.2028, 2 10.4418
 - Decimal degrees (DD): 41.40338, 2.17403
- **Tips:**
 - Use the degree symbol instead of "d".
 - Use periods as decimals, not commas. Incorrect: 41,40338, 2,17403. Correct: 41.40338, 2.17403.
 - List your latitude coordinates before longitude coordinates.

- Check that the first number in your latitude coordinate is between -90 and 90.
- Check that the first number in your longitude coordinate is between -180 and 180.
- **Control Display:** Control may not display depending on Display Formula value configuration.

Note: if Read-Only attribute is enabled, the fields will be locked and data entry will not be allowed.

Control Properties in Form Design

The following configuration properties are available for the control:

- **Label:** The label that will be presented to the submitter for the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Required?:** Specifies whether the control is required to be entered by the submitter.
- **Conditionally Display Control?:** If checked, the **Display Formula** will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.


Name

The Name control captures a Name and Title value. This can be used to capture the name/title of a owner, operator or project manager.

Control Properties in Submission Wizard


Name Control

The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Data Entry:** The data entry area for the control. Note: if Read-Only attribute is enabled, the fields will be locked and data entry will not be allowed.
 - **Full Name:** The full name for the person.
 - **Title:** The title of the person.
- **Control Display:** Control may not display depending on Display Formula value configuration.

Control Properties in Form Design

The following configuration properties are available for the control:

- **Label:** The label that will be presented to the submitter for the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Autopopulation Value:** When a value is selected in this attribute, information will automatically be populated in the control based the respective value found in the submitters users profile (e.g., user name, user email address, etc.).
- **Required?:** Specifies whether the control is required to be entered by the submitter.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.

Tables

Table controls allow for the capture of a table of data from the submitter. This section will describe the available Table control options.

Advanced Table


The Advanced Table control allows for the capture and/or display of data in a highly formatted table structure. Users can interact with the table (e.g., adding/removing rows), if appropriate, and entered data can be controlled using a number of Simple and Formatted control types.

Control Properties in Submission Wizard

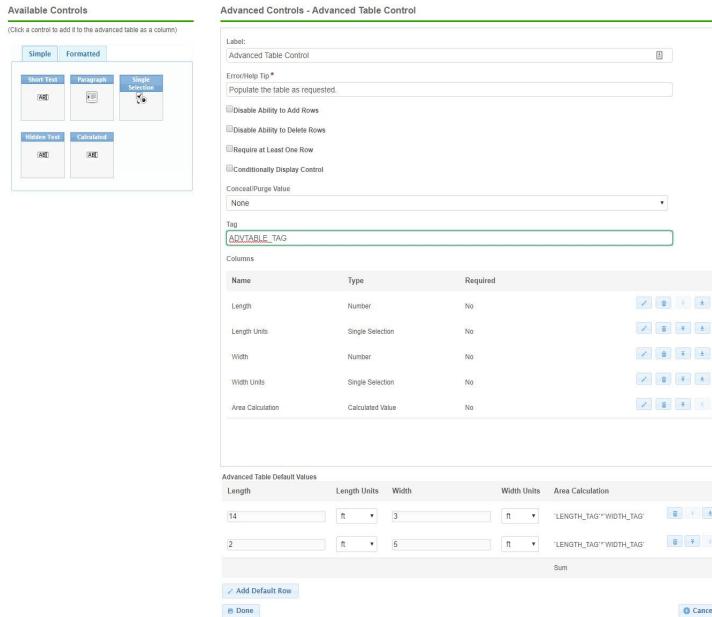
| LENGTH | LENGTH UNITS | WIDTH | WIDTH UNITS | AREA CALCULATION |
|--------|--------------|-------|-------------|------------------|
| 14 | ft | 3 | ft | 42 |
| 2 | ft | 5 | ft | 10 |
| | | | | Sum: 52 |

ADD ROW


The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter. Note: this field can be omitted to suppress the table header label (i.e., if stacking tables).
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Data Entry:** The data entry area for the control. Note: if Read-Only attribute is enabled, the fields will be locked and data entry will not be allowed.
 - **Column Label:** The label for the column of data.
 - **Column Values:** The values for entry in a column. Each columns control type and available values will be dependent upon the configuration for the table.
 - **Add Row:** When available, clicking the **Add Row** button will create a new row to the table.
 - **Delete:** When available, clicking the **Delete** 'x' button will delete the selected row from the table.
- **Control Display:** Control may not display depending on Display Formula value configuration.

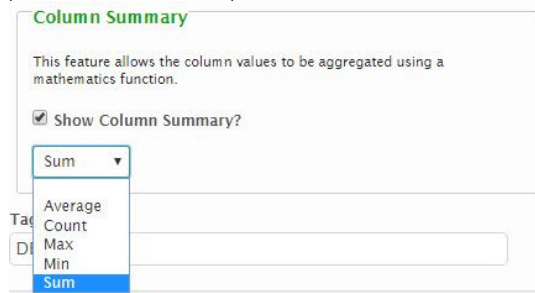
Control Properties in Form Design



The following configuration properties are available for the control:




- Label:** The label that will be presented to the submitter for the control.
- Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- Disable Ability to Add Rows:** If checked, the Add Row button will be hidden from the submitter to prevent rows from being added to the table. This can be helpful for locking down the table in situations where the tables data is prepopulated or defaulted with data.
- Disable Ability to Remove Rows:** If checked, the "x" button next to the data rows will be hidden from the submitter to prevent rows from being deleted from the table. This can be helpful for locking down the table in situations where the tables data is prepopulated or defaulted with data.
- Require at Least One Row:** If checked, the submitter will be required to provide at least one row of data in the table.
- Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- Conceal/Purge Value:** For sensitive information, control value selection can be set the conceal, conceal and purge, or none. If "None" is selected, data will display in standard ways. If "Conceal" is selected, data entered in this control will be concealed from most users. If "Conceal and Purge" is selected, data entered in this control will be concealed from most users and will be purged from the submission, once the submission is finalized.
- Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.
- Columns:** This area will define the columns presented in the table.
 - To add new column, click on one of the available controls from left **Available Controls** pane which will add the **Column** to the **Columns** area. This will activate the control design dialog for the relevant control. The available controls are limited to those that are considered most appropriate for use in a table. See control type configuration properties in this topic, above, for the selected control types.

It is worth noting that one additional set of configuration options are available to support column footer calculations in a table. This includes:
 - Column Summary:** This configuration option allows the column values to be aggregated using a mathematic function.
 - Show Column Summary?:** If checked, a **Summary Type** dropdown will display.
 - Summary Type:** Allows user to select type mathematic function (Average, Count, Max, Min, Sum) to perform for the column summary.



Note: To edit a column, click on the **Edit** icon () for the desired column.

To remove a column, click on the **Delete** icon () for the desired column.

- Advanced Table Default Values:** This area allow a designer to establish a default dataset in the table, when desired. This can be handy if a finite set of data will be captured where the tables data will be fairly static.
 - To add a new default row, click on the **Add Default Row** button. A row will be added and the values in this row can be adjusted as desired. Many rows can be added, if desired.
 - To edit a column, adjust the row and column values, in place, as desired.
 - To remove a column, click on the **Delete** icon () for the desired column.
 - To reorder columns, moving a column up one position, click on the **Move Up** icon () for the desired column.
 - To reorder columns, moving a column down one position, click on the **Move Down** icon () for the desired column.

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- If the **Column Summary** option was selected in columns setup, a gray summary row will be added to the bottom of the Advanced Table Default Values table display in the form design view. The summary row will indicate the type of mathematics function used for each column selected to display a column summary.

Advanced Table Default Values

| Length | Length Units | Width | Width Units | Area Calculation |
|--------|--------------|-------|-------------|--------------------------|
| 14 | ft | 3 | ft | 'LENGTH_TAG'*'WIDTH_TAG' |
| 2 | ft | 5 | ft | 'LENGTH_TAG'*'WIDTH_TAG' |
| | | | | Sum |

Add Default Row

The Calculated control can be included in the table as a Column to perform calculations or summarize data across a particular row.

[Bulk Upload] Table

The [Bulk Upload] Table control allows the agency to provide a predefined spreadsheet template to the submitter for download, population, copy and upload back into the system. The Table control is intended to ease data entry for bulk datasets. Users will download a predefined spreadsheet template, populate this template with the appropriate data, and then copy the raw data from the populated spreadsheet and paste the data in to the table control on the form, where the system will capture the data and present it back to the user for review.

Control Properties in Submission Wizard - Pre Data Upload

[Bulk Upload] Table Control

This control is used to support bulk importing of data.

1. CNN
2. Populate the template with your data
3. Copy the entire table (CTRL+C)
4. Paste into the textbox below (CTRL+V)


Control Properties in Submission Wizard - Post Data Upload

[Bulk Upload] Table Control

This control is used to support bulk importing of data.

| Column A | Column B | Column C |
|----------|----------|----------|
| Row 1 | 6 | 11 |
| Row 2 | 7 | 12 |
| Row 3 | 8 | 13 |
| Row 4 | 9 | 14 |
| Row 5 | 10 | 15 |


The following properties are available for display/data entry with this control in the Submission Wizard:

- **Label:** The label for the control will be displayed to the submitter.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control.
- **Description Text:** Descriptive instructions/text present to the submitter with regards to how to use the template, data population or the upload process.
- **Link:** The link for downloading the pre-defined spreadsheet template which will be used for data entry.
- **Data Entry:** The data entry area for the control.
 - **Table Data:** Data will be copied from the populated spreadsheet template and pasted in to this area for upload. Once the data is pasted in this area, it will be automatically displayed to the user for review/confirmation.

- **Clear Data:** The Clear Data button can be clicked to clear the data in the Table Data area.
- **Control Display:** Control may not display depending on Display Formula value configuration.

Control Properties in Form Design

The following configuration properties are available for the control:

- **Label:** The label that will be presented to the submitter for the control.
- **Error/Help Tip:** The help tip that will be presented to the submitter when hovering their mouse over the help tip icon () for the control. This attribute will also be utilized to provide additional information to the submitter when an invalid value is available for the control.
- **Description Text:** Any descriptive instructions/text to present to the submitter with regards to how to use the template, data population or the upload process.
- **Link Title:** The text that will be displayed as the URL link to the spreadsheet template.
- **Link URL:** The fully qualified URL location (e.g., <https://www.mydomain.org/SpreadsheetTemplate1.xlsx>) of the spreadsheet template. Note: this template will need to be located in a publicly available location.
- **Read-Only?:** If set to "Yes", the control will be displayed in a read-only mode. If set to "No", the control will be editable. If set to "If Prepopulated", the control will be displayed in read-only mode, if the control is pre-filled with data.
- **Required?:** Specifies whether the control is required to be entered by the submitter.
- **Conditionally Displayed Control?:** If the control will be allowed to display conditionally, during submission process, check the **Conditionally Display Control** checkbox. When checked, the **Display Formula** field will be enabled for configuration.
 - **Display Formula:** The formula used to determine if this control will be displayed in the form. See **Formula Builder (Section 10.4)** topic for additional details on use of this field.
- **Tag:** The unique name assigned to the control to allow the control to be uniquely identified. This attribute is essential for facilitating the data importing and exporting processes.

10.4 Formula Builder

A Formula Builder is available to provide advanced users with the ability to dynamically perform system functions (e.g., hide/display, required value, calculate value, etc.) based on an advanced formula. This section details the available functionality provided by this Formula Builder.

The Formula Build is available in the Form Designer for the following purposes:

- **Conditionally Displaying Sections:** for specification of the formula for when to display a section.
- **Conditionally Displaying Controls:** for specification of the formula for when to display a control.
- **Calculated Control:** for specification of the value calculation formula.

The following sections describe each of these scenarios in detail.

Please note that the Calculation Based Fees Formula and the Repeating Section and Advanced Table Data Source Formula's utilize an earlier iteration of the formula builder which functions somewhat differently. These instructions do not reflect the formula formats for that field. See the **Calculation Based Fees (Section 10.2)** subject within the **Form Details (Section 10.2)** topic and the **Single (Section 10.3)** or **Multiple Selection (Section 10.3)** subjects within the **Controls (Section 10.3)** topic for additional details.

Conditionally Displayed Section

Form sections can be conditionally displayed based on values provided from form controls. This feature allows a form designer to specify a formula for determining if a form section will be displayed in the form.

The entered formula must evaluate to "True" or "False". If the formula returns "True", the section will be displayed, and any validation configured for the section will be applied on the form. If the formula returns "False", the section will remain hidden, and any configured validation requirements will be ignored.

Tagged section that match an eligible type can be used as variables in the formula.

To utilize this feature:

1. Add a new section or edit an existing section from the Form Designer area.
2. From the Section Edit dialog, check the **Conditionally Display Section** checkbox on the Section design dialog for any section, the **Conditionally Display Formula** field will be displayed for configuration.
3. Use the + Tags, +Operators and +Functions buttons to build the desired formula/criteria for determining if a section will be displayed in the form. Note: The formula must evaluate to "True" or "False". A formula returning "True" will activate this section. A formula returning "False" will hide this section. See the **Formula Builder Capabilities** and **Formula Builder Examples** subjects of this topic for additional details of the formula and for sample formulas.

Conditionally Display Section

Construct a formula that will determine when this section is hidden or shown in the form, based on data users have entered elsewhere in the form. Use **Tags** (i.e., wrapped in backticks) to reference data input in other fields on the form. Use **Functions** to perform an action/function on the data in the formula. Use **Operators** to combine or compare data.

Conditional Display Formula
This section will **show** when the following expression evaluates as **true**.

1
2
3
4
5

+ Tags + Operators + Functions

Examples

``FACILITIES_COUNT` > 1`
Displays if there is more than one Facility, as determined by a Number control tagged with `FACILITIES_COUNT`. This would allow the user to skip questions regarding multiple facilities, if their submission only deals with a single facility.

``HAS_VIOLATION`.description == `Yes``
Displays if the user selects "Yes" from a Single Select control with a Tag value of `HAS_VIOLATION`.

Conditionally Displayed Controls

Most controls provide the ability to be conditionally displayed based on values provided from other controls. This feature allows a form designer to specify a formula for determining if a control will be displayed in the form.

The entered formula must evaluate to "True" or "False". If the formula returns "True", the control will be displayed, and any validation configured for the control will be applied on the form. If the formula returns "False", the control will remain hidden, and any configured validation requirements will be ignored.

Tagged controls that match an eligible type can be used as variables in the formula.

To utilize this feature:

1. Add a new control or edit an existing control on a form from the Form Designer area.
2. From the Control Edit dialog, check the **Conditionally Display Control?** checkbox on the Control design dialog, the **Display Formula** will be displayed for configuration.

- Use the + Tags, +Operators and +Functions buttons to build the desired formula/criteria for determining if a control will be displayed in the form. Note: The formula must evaluate to "True" or "False". A formula returning "True" will activate this control. A formula returning "False" will hide this control. See the **Formula Builder Capabilities** and **Formula Builder Examples** subjects of this topic for additional details of the formula and for sample formulas.

Conditionally Display Control

Construct a formula that will determine when this control is hidden or shown in the form, based on data users have entered elsewhere in the form. Use **Tags** (i.e., wrapped in `backticks`) to reference data input in other fields on the form. Use **Functions** to perform an action/function on the data in the formula. Use **Operators** to combine or compare data.

Display Formula
This control will **show** when the following expression evaluates as **true**.

1

2

3

4

5

+ Tags
+ Operators
+ Functions

Examples

``FACILITIES_COUNT` > 1`

Displays if there is more than one Facility, as determined by a Number control tagged with `FACILITIES_COUNT`. This would allow the user to skip questions regarding multiple facilities, if their submission only deals with a single facility.

``HAS_VIOLATION`.description == 'Yes'`

Displays if the user selects "Yes" from a Single Select control with a Tag value of `HAS_VIOLATION`.

Calculated Control

A Calculated control exists to provide the ability to calculate a value based on values provided from other controls. This feature allows a form designer to specify a formula for calculating a value in the form. Note: the Calculated control can also be hidden, if desired.

The entered formula can evaluate to a string, boolean or a numeric value.

Tagged controls that match an eligible type can be used as variables in the formula.

To utilize this feature:

- Add a new Calculated control or edit an existing Calculated control on a form from the Form Designer area.
- The **Calculated Value Formula** field will be displayed for configuration.
- From the Control Edit dialog, use the + Tags, +Operators and +Functions buttons to build the desired formula/criteria for determining if a control will be displayed in the form. See the **Formula Builder Capabilities** and **Formula Builder Examples** subjects of this topic for additional details of the formula and for sample formulas.

Construct a formula for performing the desired calculation using the **Tags**, **Operators** and **Functions** available. Use **Tags** (i.e., wrapped in backticks) to reference data input in other fields on the form. Use **Functions** to perform an action/function on the data in the formula. Use **Operators** to combine or compare data.

Calculated Value Formula
Enter the formula for the calculation to be performed.

| | |
|---|---------------|
| 1 | `NUMBER1_TAG` |
| 2 | |
| 3 | |
| 4 | |
| 5 | |

+ Tags
+ Operators
+ Functions

Examples

``BoxLength` * `BoxWidth``

Calculates the area of a box based on the dimensions entered by the user in the *BoxLength* and *BoxWidth* fields.

`sum(`RepeatingSection:Tons`)`

Calculates the sum all the *Tons* values entered by the user across all repeaters in a repeating section with the *Tag* value of *RepeatingSection*.

Formula Builder Capabilities

This section will provide some examples of how to utilize the formula builder to return the desired results.

Formulas allow for use of and inclusion of the following primary elements:

- **Tags** to reference values in other controls within the form.
- **Operators** (e.g., ==) for use in a formula. These are operators such as +, - or / to perform mathematic operations.
- **Functions** to aggregate and evaluate data. These are functions such as sum(), avg() and iff() to aggregate or evaluate data.


Tags

Tags are references to values in other controls within the form. Clicking the "+ Tags" button will provide a list of all eligible for selection and inclusion in the formula.

Referenced **Tags** must be wrapped contained within single tick marks (e.g., `SITE_NAME`). Note: A tick (i.e., `) is different than the single quote (i.e., ') characters on the keyboard.

The following control types can be referenced in a formula:

- Simple:
 - Short Text
 - Paragraph
 - Single Select
 - Multiple Select
- Formatted:
 - Date
 - Email
 - Number
 - Phone
 - Time
 - URL
- Advanced
 - Calculated
 - Hidden
 - Read Only

 Users can reference Controls in another Section as long as the Section and the Control in question were each assigned a **Tag** value.

Operators

Operators are used in a formula to perform an operations on the data in a formula. Available operations include:


| Operator | Description |
|----------|--|
| && | 'And' |
| | 'Or' |
| >= | 'Greater Than Or Equal To' |
| > | 'Greater Than' |
| <= | 'Less Than Or Equal To' |
| < | 'Less Than' |
| == | 'Equal' |
| != | 'Not Equal' |
| + | Add numbers or join strings |
| - | Subtract numbers or negate number |
| * | Multiple numbers |
| / | Divide numbers |
| ? | Ternary operator (condition ? itTrue: ifFalse) |
| ^ | Power operator (x ^ y) |
| ! | Boolean negation operator |

Functions

Functions aggregate and evaluate data. These are functions such as SUM(), AVG() and IIF() to aggregate or evaluate data.

| Function | Description |
|--|--|
| sum(x, y, z, ..., n) | Adds all members of an array using "+". x, y, z and n represent individual values. |
| avg(x, y, z, ..., n) | Averages all members of an array using "+" and "/", returns 0 on empty array. x, y, z and n represent individual values. |
| max(x, y, z, ..., n) | Returns the number with the highest value. x, y, z and n represent individual values. |
| min(x, y, z, ..., n) | Returns the number with the lowest value. x, y, z and n represent individual values. |
| abs(x) | Returns the absolute value of x. x represents an individual value. |
| count(array) | Counts all members in an array (e.g., Advanced Table or Repeater). |
| first(array) | Returns first element of an array (e.g., Advanced Table or Repeater). |
| last(array) | Returns last element of an array (e.g., Advanced Table or Repeater). |
| date(dateValue) | Converts argument to date. Works on array children. |
| today() | Returns current date. |
| now() | Returns current date and time. |
| formatDate(date,format) | Converts date argument to formatted string. Works on array children. |
| dateDiff(startDate, endDate, dataPart) | Calculates the difference between two date values (startDate and endDate) in |

| | |
|---|---|
| <code>dateAdd(startDate, interval, datePart)</code> | years, months or days (datePart). Calculates the date after which a certain date/time interval has been added. |
| <code>ceil(x)</code> | Returns x, rounded upwards to the nearest integer. x represents an individual value. |
| <code>floor(x)</code> | Returns x, rounded downwards to the nearest integer. x represents an individual value. |
| <code>pow(x,y)</code> | Returns the value of x to the power of y. x represents individual value and y represents the power to value. |
| <code>round(x)</code> | Rounds x to the nearest integer. x represents an individual value. x represents an individual value. |
| <code>num(n)</code> | Converts argument to number. x represents an individual value. |
| <code>str(any)</code> | Converts argument to a string. x represents an individual value. |
| <code>val(x)</code> | Assigns most appropriate data type (e.g., number, boolean, or native type) based on actual value returned. x represents an individual value. |
| <code>type(x)</code> | Returns the JavaScript "typeof" result for the object. x represents an individual value. |
| <code>iff(condition, ifTrue, ifFalse)</code> | Use iff to return a value based on a condition being True or False. If the condition is True, iff returns ifTrue value; if it is False, returns ifFalse value. |
| <code>select(switchValue, {case: conditionX, value: x}, {case: conditionY, value: y}, ...)</code> | Switch statement, performed from left to right, returning the value for the first case condition that equals the switchValue. conditionX and conditionY represent individual conditions. x and y represent individual values. |
| <code>coalesce(x, y, z, ..., n)</code> | Evaluates the arguments in order and returns the current value of the first expression that does not evaluate to NULL. x, y, z and n represent individual values. |
| <code>trim(x)</code> | Removes leading and trailing white space and line terminator characters from a string. x represents an individual value. |
| <code>toLowerCase(x)</code> | Converts string to lower case. x represents an individual value. |
| <code>toUpperCase(x)</code> | Converts string to upper case. x represents an individual value. |
| <code>replace(text, findWhat, replaceWith)</code> | Replaces text within a string. text represents string element being evaluated. findWhat represents the text to match. replaceWith represents the text to substitute for the matched text. |
| <code>contains(array, x, y, ..., n)</code> | Returns true if array contains all listed values. array represents an array of values. x, y and z represent individual values. |
| <code>lookup(recordSelectionLogicalTest, resultControlTag)</code> | Looks up a value from a column cell or control based on a logical test applied to select the row or record, in an Advanced Table or Repeater, respectively. |

 Some values may be returned as a string concatenation. In these cases, the value may need to be converted to the desired format using num(), str() or val() functions.

Formula Builder Examples

Below are some examples of formulas that can be used in the Formula Builder.

The following formula evaluates to True if the SiteName field is equal to "My Site".

Exact Text Comparison Example

```
`SiteName` == "My Site"
```

The following formula evaluates to True if the SiteName field is empty.

Empty Field Example

```
`SiteName` == null
```

The following formula evaluates to True if the SiteName field is not empty.

Not Empty Field Example

```
`SiteName` != null
```

The following formula evaluates to True if the selected (and displayed) value in the SelectMenu field (Single or Multiple Select Control) is equal to "Yes". Note the ".description" selection to signify that the comparison will be performed on the displayed description, versus the hidden ID. If the hidden ID value needs to be referenced, ".id" can be specified.

Select Control Selection (Displayed Description) Exact Comparison Example

```
`SelectMenu`.description == "Yes"
```

The following formula evaluates to True if the selected (and displayed) Pending Violations Select Control value is equal to "Yes", otherwise returns False.

Select Control Selection (Displayed Description) If/Then Comparison Example

```
iff(`PendingViolations`.description == "Yes", true, false)
```

The following formula evaluates to True if the ID for the selected value in the SelectMenu field (Single or Multiple Select Control) is equal to "2".

Select Control Selection (Hidden ID) Exact Comparison Example

```
`LinkedValue`.id == "2"
```

The following formula evaluates to True if the selected (and displayed) value in the County (Single or Multiple Select Control) contains the text "Multnomah", "Clackamas" or "Washington".

Select Control Selection (Displayed Description) Contains Comparison Example

```
contains(`County`.description, 'Multnomah', 'Clackamas', 'Washington')
```

The following formula multiplies BoxLength by BoxWidth to calculate area.

Simple Math (Multiplication) Example

```
`BoxLength`*`BoxWidth`
```

The following formula sums all the Tons values across all Repeaters in a Repeating Section.

Aggregation Function (Summarize) Across Repeating Sections Example

```
sum(`RepeatingSection:Tons`)
```

The following formula averages the Tons values across all Repeaters in a Repeating Section.

Aggregation Function (Average) Across Repeating Sections Example

```
avg(`RepeatingSection:Tons`)
```

The following formula returns an [Emissions Value] value from a cell in an Advanced Table where another cell, on the same row, has a matching value [VOC name of Formaldehyde].

Return Cell Value from Advanced Table Based on Value in Another Cell

```
first(lookup(`Emissions_Table_Section:Emissions_Table`.AT_VOC_NAME ==  
"Formaldehyde", `Emissions_Table_Section:Emissions_Table`.AT_Emissions_Value))
```

The following formula returns an [Emissions Value] value from a field in a Repeater where another field, on the same repeater, has a matching value [VOC name of Formaldehyde].

Return Cell Value from Repeater Based on Value in Another Field within Repeater

```
first(lookup(`Emissions_Repeater:VOC_NAME` ==  
"Formaldehyde", `Emissions_Repeater:EMISSION_VALUE`))
```

The following formula counts the number of rows in an Advanced Table where a [Emissions Value] value exceeds a limit (e.g., 10).


Count Values Exceeding Limit in an Advanced Table

```
count(lookup(val(`Emissions_Table_Section:Emissions_Table`.AT_Emissions_Value) >  
10, `Emissions_Table_Section:Emissions_Table`.AT_Emissions_Value))
```

The following formula counts the number of records in a Repeater where a [Emissions Value] value exceeds a limit (e.g., 10).

Count Values Exceeding Limit in a Repeater

```
count(lookup(val(`Emissions_Repeater_Section:RS_EMISSION_VALUE`) > 10,  
`Emissions_Repeater_Section:RS_EMISSION_VALUE`))
```

 Please note that copying and pasting these formulas directly from this page to the formula builder field may result in incorrect formula definitions due to conversion issues between the toolsets. Formulas should be hand entered in the formula builder for desired results.

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