

Form Fill User Experience

Phase 1:

Add manual push using Form Template in the Profile Dialog of Right pane menu

Expose Anonymous File Requests and Share in Workflow

Add step in workflow to push profile using form fill

Add file request container type that uses a file and form fill template

Cleanup Accusoft UI, change button locations.

Change Name of Checklist for things filler needs to do

Phase 2:

Zonal OCR form template fields

Misc..

Change annotation Tool Order

Research:

Guided Form Fill

Auto-save Form Fill - Both Design and Playthrough

Need to allow filling it out partially and then resuming

User Stories:

User pushes metadata into document using Form Fill Template

User Creates Form Fill Template and asks different user to fill it out

User Fills out document and info is pulled into profile

Notes:

- Possibly accessible from templates admin and from a new screen in the right panel that's specifically for form fill templates
- Templates apply form fill templates as well?
- Tie a profile to a form fill template
- 3 modes in previewer - View, Designer, Fill Form
- Filling out form needs to save progress and needs to confirm completion
- Progress indicator during form fill needs to be more clear (especially with 0 fields filled)
- Next button to continue during form fill
- Good icon to indicate FormTemplates on NodeDetails panel, different from preview or design

- Icon on node in nodelist that indicates a document needs to be filled out
- Fill Form icon needs to disappear after complete is clicked
- New view of forms that aren't filled out

More Notes:

- Need for uploading form template files from inside of our system
- Make apply template selector a multi-select? Can then apply full template or individual form templates
- Easily applying a form template into a new location is a major factor
- Creating form fields: Profile boxes and allow editing of custom boxes

Form Fill Profiles:

- Items are divorced from Profiles if a node's profile is changed, they are still displayed underneath the current profile
- First selected Profile in the designer is set as the document's profile
- Add dropdown to specify profile for a document in the top right
- Add ability/checkbox to force the profile, even if required profile items aren't added or parent profile is different otherwise it is a "suggestion" if it can be applied

Previewer UI

- Keep black bar at top and bottom at all times if possible
- Drop down for selecting Profiles/Profile items

Templates

- Apply template selector will allow multi-select and partial application of templates
- Possible UI updates, apply template tree on left with selected node list on the right
- All selected template nodes will be applied at the top layer with all of their children
- Update sync changes logic to handle when the parent node does not exist
- Reuse the current apply template endpoint and do one at a time in order selected
- Investigate mass apply to take multiples as well
- Need to indicate

DB Model:

- Store full JSON inside DbFormFillDefinitions
- Add table that links profileItems to FieldIds and the FormFieldDefinition (Unique constraint on FormFieldDefinition, FieldId together?)
- If they change definition with pending form fills, then notify before the save
- If saved, then delete all pending
- Designer does not need to autosave, only filling forms

File Requests:

- Add option Request File, Request Multiple Files, or Request Form (Request Using Fillable Form, Form Fill Request)?
- Remove default File Request Container
- Enable editing in node selector
- Allow uploading
- After file request, open up form fill editor
- Linking table between container and files for document?
- Reuse template permissions to allow creating of form fill requests?
- New linking table DbFileRequestFormFillContainer (FormFillDefinitionId, OriginatingFileInfold)
- File specific ones in it's own table DbFileRequestFileContainer
- DbFileRequestCurrentFormFills (FormFillDefinitionId(Different from Originating), OriginatingFileInfold, UserId(Who is filling out the form)) When complete form, then fill out form and insert into FileRequestContainer
- Open Iframe to edit - In url access token, form fill id, fileinfoid, optional : fileRequestContainerId, optional : nodeId
- Copied when someone comes in to fill it out if it's multiple, otherwise everyone fills out the same document
- Once it's completed, then original node is copied and form is burned into document and stored,
- To add profile, maybe hit our own api first and intercept the info
- Min and max for "IsMultiple"?
- Offer to reuse a definition when adding to a file request
- Check for existing FormFillDefinitions
- Need to add verbage to indicate Container (Or something better)*
- Deliniate between template form request or from storage, node selector will allow uploads
- After node selection, pop up with preview in designer mode
- Form fill container, "Select File" until selected, then show change or edit form fill
- If selected item has a FormFillDefinition, offer to copy or create new, then go to designer mode
- In Form Fill Container, allow configuring of min/max, max allow nullable for infinite?
- Messaging of when Form Fill is saved? It's an iframe, so we can't just get the JSON and the filerequest doesn't exist yet to allow us to save. For now plan on messaging with the iframe.

Notes for FormFill Request Creation

- Multiple form fills for the same container, UI needs some work possibly
- Regular buttons, not container
- "Files to Request" to "Documents to Request"
- Template vs Storage, popup
- Pass FormFillDefinition JSON between windows, can't be saved to db until request is complete
- Add edit button to FormFillContainer
- Allow fulfillment per user or all users
- Container: Requirements for completion header

- Maybe: Container uses tally
- Required Uses instead of min/max?

Ideas for Recipient playthrough

- "Get Started" button in playthrough
- Guided through every document, not just the form fills
- Change containers, smaller and vertical
- Adjust creation to match
- Move Subject/Recipients to drop down up top
- Move Previewer into main window
- Move Document List into the right panel
- Collapse Left menu
- If mobile is detected, hide left and right panels

To Ask Jessie:

- Renaming of File Requests to Document Requests

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