

Central block 8 release criteria

 backlog •  iteration commit •  in progress •  qa/verification •  done

Note: This release adds form versioning and form drafts, and in so doing, changes the flow of form creation. As before, the creation of a new form requires an upload of a form definition. But, that upload now creates a draft that can be tested and revised before it is finalized and published.

Forms

-  [4.04b Create initial draft upon initial form creation](#)
-  [4.23 See draft version summary](#)
-  [4.24 Set draft form definition](#)
-  [4.25 Set draft form media files](#)
-  [4.26 Test draft form submission](#)
-  [4.27 See draft form submissions](#)
-  [4.29 Abandon draft](#)
-  [4.28 Publish draft version](#)
-  [4.30 See form versions](#)
-  [4.04a Create a new form version](#)
-  [4.05 See version statuses on Overview](#)
-  [See Draft state warning on Form Access tab](#)

Other

-  [Update Frontend dependencies](#)
-  [Update Backend dependencies](#)

[Bugfixes](#)

[Improvements](#)

Appendix

[Standard Form Definition Buttons](#)

Bugs Fixed + Small Wins

- [c#102 See the actual Form XML when previewing](#)
- [4.22 Download Form XML or XLSForm](#)

Release notes

Later release

- [Offer client audits over OData?](#)
- [Make backups configurable/directly triggerable](#)
- [User analytics](#)

[Other things](#)

Forms

✓ 4.04b Create initial draft upon initial form creation

The screenshot shows the 'Open Data Kit' interface for a 'Forest Management Protocol' project. The user is 'Ryan Gosling'. The main section is titled 'Intake Form' with tabs for 'Overview', 'Versions', 'Submissions', and 'Settings'. On the right, there are tabs for 'Draft', 'Status', 'Media Files', and 'Testing & Data'. The 'Draft' tab is active, showing a 'Draft Checklist' on the left and 'Your Current Draft' on the right. The checklist includes: 'Upload initial form definition' (checked), 'Upload revised form definition (optional)' (unchecked), 'Upload form media files' (checked), 'Test the form on your mobile device' (unchecked), and 'Publish the draft' (unchecked). The 'Your Current Draft' section shows a draft named '20190503-fixed' with a 'View XML' button and an 'Upload new definition...' button. At the bottom, there are 'Publish draft...' and 'Abandon draft...' buttons.

- When I have uploaded a form definition to create a brand new form, and everything was successful
 - I should be taken directly to the Draft Status tab of the new form
 - I should see this tab on the right half of the tab bar, in a grey section, along with the tab “Testing & Data”
 - And I should see the Overview, Versions, Submissions, and Settings tabs greyed out
 - And when I hover over these tabs I should see a tooltip “These functions will become available once you publish your Draft Form”
 - And when I look at the checklist, I should see an additional (compared to 4.23) item at the start of the list
 - And it should have the name “Upload initial form definition” and it should have explanatory text as shown

- And it should always be marked done
- But I should not see this item when I create a new draft of an existing Form

✓ 4.23 See draft version summary

The screenshot shows the 'Intake Form' interface for the 'Forest Management Protocol' project. The user is logged in as 'Ryan Gosling'. The page is divided into several sections:

- Navigation:** Includes links for 'Overview', 'Versions', 'Submissions', and 'Settings'.
- Draft Checklist:** A list of four items:
 - Upload revised form definition (optional):** Unchecked. Text: 'If you have made changes to the form itself, including question text or logic rules, now is the time to upload the new XML or XLSForm using the button to the right.'
 - Upload form media files:** Checked. Text: 'Your form design references files that we need in order to present your form. You can upload new or updated copies of these for distribution under the Media Files tab. Click here to find out more.'
 - Test the form on your mobile device:** Unchecked. Text: 'It's a good idea to test the form to be sure it (still) works the way you expect. Using the test QR code, you can make a test submission that won't affect your real data. Click here to find out more.'
 - Publish the draft:** Unchecked. Text: 'When you are sure your draft is ready and you wish to roll it out to your devices in the field, you can publish it using the button to the right. Click here to find out more.'
- Your Current Draft:** Shows the draft name '20190503-fixed' with a 'View XML' button and an 'Upload new definition...' button.
- Actions:** Contains two buttons: 'Publish draft...' and 'Abandon draft...'.

- When I am on the Status tab of the form draft, then I should see:
- On the left, the heading “Draft Checklist” and below that a checklist
 - I should see the list item “Upload revised form definition (optional)” with explanatory text as shown. I should never see this item checked.
 - If the current form definition expects Media Files, then I should see the list item “Upload form media files” with explanatory text as shown.
 - If all the Media Files expected are present, I should see that the item is checked off.
 - If I click on the “Media files” link, I should be taken to the Media Files tab.
 - I should see the list item “Test the form on your mobile device” with explanatory text as shown.
 - If I click on the “test QR code” link, I should be taken to the Testing & Data tab.
 - If I have made test submissions, I should see that the item is checked off.
 - I should see the list item “Publish the draft” with explanatory text as shown. I should never see this item checked.

- On the right, the heading “Your Current Draft”
 - And below that, I should see the current version information of the draft definition, as given in 4.05
 - And below that, a button “Upload new definition...” (given in 4.24)
- And below that, the heading “Actions”
 - And the buttons “Publish draft...” (4.28) and “Abandon draft...” (4.29)

✓ 4.24 Set draft form definition

- When I am on the Status tab of the form draft
- Then below the current form version information I should see a button “Upload new definition...”
 - And when I click on it, I should get the same modal I get when creating a form for the first time
 - Except that I should see the title “Upload new form definition”
 - And I should not see the second sentence about media files
 - And when I have successfully uploaded a valid definition, then I should see the new version reflected across the interface:
 - I should see the version string
 - I should see the new checklist and media files tab states
- When I am uploading a form definition in the modal,
 - If I upload a definition with the wrong xmlFormId,
 - Then I should see an error “The form definition you have uploaded does not appear to be for this form. It has the wrong formId (expected “abc”, got “xyz”).”
 - ~~○ If I upload a definition which has a version equal to any known version of the form,~~
 - ~~■ Then I should see an error “The form definition you have uploaded has a version (“abc”) which conflicts with a past version of this form. Please change it to something new and try again.”~~
 - If I upload a definition which contains an xpath which conflicts with an existing version of the form,
 - Then I should see an error “The form definition you have uploaded includes a field \$PATH with a data type \$TYPE. But in a previous version of this form, that field has a data type \$TYPE. Please either rename the field, or adjust your form so that the field **has the same data type as before.**”

✓ 4.25 Set draft form media files

Open Data Kit

UsersSystem

Ryan Gosling

Forest Management Protocol [Back to Project Overview](#)

Intake Form

Draft

OverviewVersionsSubmissionsSettingsStatusMedia FilesTesting & Data

Based on the form you uploaded, the following files are expected. You can see which ones have been uploaded or are still missing.
To upload files, drag and drop one or more files onto this page.

Type	Name	Uploaded	Actions
Image	question2-en.jpg	Today 14:21	 
Image	question2-fr.jpg	Today 14:24	 
Video	question9-en.jpg	 Not yet uploaded	 
Video	question9-fr.jpg	 Not yet uploaded	 

- When the draft form definition expects media files
 - Then I should see the Media Files tab in the draft greybox
 - And when I click on it, I should get the tab exactly as it exists today

✓ 4.26 Test draft form submission

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Intake Form

Draft

OverviewVersionsSubmissionsSettingsStatusMedia FilesTesting & Data

Draft Testing

You can use the configuration code to the right to set up a mobile device to download this draft. If you fill a blank of the draft form and upload it, the submission will go only into this test table below. You can preview and download the test submissions below.

When you publish this draft form, these test submissions will disappear forever. Please see [this article](#) for more information.



- When I have a draft of my form, and I click on the Testing & Data tab
- Then at the top of the page I should see some explanatory text
- And to the right of the text I should see a QR Code

- When I scan the QR Code into Collect and fetch blank forms, I should see only one form, which is the draft version of the form
- When I submit data for that form from Collect, I should see that data in the submission table on the Testing & Data tab

✓ 4.27 See draft form submissions

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Back to Project Overview

Intake Form

Overview
Versions
Submissions
Settings
Draft
Status
Media Files
Testing & Data

Draft Testing

You can use the configuration code to the right to set up a mobile device to download this draft. If you fill a blank of the draft form and upload it, the submission will go only into this test table below. You can preview and download the test submissions below.

When you publish this draft form, these test submissions will disappear forever. Please see [this article](#) for more information.



Filter by
Submitted By
Submitted At
Download all 6 records

	Submitted By	Submitted At	first_name	last_name	age	date	Instance ID
5	Beyoncé	Today 11:03	Maeve	Millay	8	2018/04/12 03:55:58	39e34c4f-6365-445b-aab8-d
4	Beyoncé	Today 11:02	Dolores	Abernathy	56	2018/03/21 19:21:04	0234b1ef-b484-4717-b821-0
3	Beyoncé	Today 11:00	Bernard	Lowe	31	2018/11/09 00:07:36	9f978f0e-7d68-4b18-bbc6-f1
2	Ryan Gosling	Tuesday 12:40	Elsie	Hughes			5dcb3257-8a78-4acf-a24e-2
1	Ryan Gosling	Tuesday 12:39	Hector	Escaton		2017/12/31 21:14:08	9fd61c90-5e01-422b-bd2d-1

- Below the QRCode, I should see a submissions table
 - Hmm, I should probably not see “Submitted By,” it does not seem useful? -issa
 - I should see a Refresh button like on the normal Submissions tab
 - I should see a Download button like on the normal Submissions tab
 - I should see the table like on the normal Submissions tab
 - If the form or the project is encrypted, I should see the encrypted version of the table.
 - And all of these things should work as usual, except they only show data from the draft version

✓ 4.29 Abandon draft

- When I am looking at the Draft Status page, and I click on the “Abandon Draft” button,
 - And if there already exists a published version of this Form,

- Then I should see a confirmation modal with the title “Abandon Draft” and the text “You are about to permanently delete the draft version of this Form. This means that the draft Form definition, any draft Media Files you have uploaded, and all test submissions will be removed.¶¶Your published Form definition, its Media Files, and submissions will not be affected.¶¶Are you sure you wish to proceed?”
- If I then click on the red “Abandon” button at the bottom,
 - Then I should be taken back to the Form Overview tab
 - And the Draft, along with all its media files, should be gone
 - And I should see a happy message saying “The draft version of this Form has been successfully deleted.”
- If I then click on the Cancel link, then the modal should go away
- But if there is not a published version of this Form,
 - Then I should see a confirmation modal with the title “Abandon Draft and Delete Form” and the text “You are about to permanently delete this draft Form definition, along with any draft Media Files you have uploaded, and all test Submissions. Because you have not yet published it, this Form will be entirely deleted.¶¶Are you sure you wish to proceed?”
 - If I then click on the red “Abandon” button at the bottom,
 - Then I should be taken back to the Project Overview tab
 - And the Form should be gone entirely
 - And if I then try to create a new Form with the same xmlFormId,
 - I should be allowed to do so

✓ 4.28 Publish draft version

- When I am on the Draft Status tab, and I look in the Actions section, I should see a “Publish Draft...” button
 - When I click on the Publish Draft... button I should see a modal with explanatory text and a Proceed button
 - If I have not uploaded all expected Media Files, I should see a warning at the top of the modal: “You have not provided all the Media Files that your Form requires. You can ignore this if you wish, but you will need to make a new Draft version to upload those files later.”
 - If I have not made a test submission, I should see a warning at the top of the modal: “You have not yet tested this Form on a mobile device and uploaded a test Submission. You do not have to do this, but it is highly recommended.”
 - If the form definition has not changed from the published version, I should additionally see a section in the modal with explanatory text, and a required “Version” text field
 - I should see the current version string preloaded into the text field
 - If I try to submit the form with a version string that has already been used for this form, I should get an error “The version you’ve specified conflicts

with a past version of this Form. Please change it to something new and try again.”

- When I click on Publish, the draft form definition and media files should become the published versions
 - And I should see a happy message “Your Draft is now published. Any devices retrieving Forms for this Project will now receive the new Form definition and Media Files.”
 - And I should be taken to the Form Overview tab
 - And I should no longer have an active draft version of the form

✓ 4.30 See form versions

Open Data Kit Users System Ryan Gosling

Forest Management Protocol [Back to Project Overview](#)

Intake Form

Overview Versions Submissions Settings

Draft Status Media Files Testing & Data

Name	Published	Media Files	Definition
20191126-fixed-fixed 0 0	2019/11/26 11:25 Janelle Monáe	17 files	View XML Download XML
20191121-fixed 0 0	2019/11/24 09:12 Janelle Monáe	17 files	View XML Download XLSForm
20191105-original 3 1	2019/11/06 17:22 Ryan Gosling	14 files	View XML Download XLSForm

- When I am looking at a form, and there is at least one published version of it
 - Then the Versions tab should be enabled
 - When I click on it, I should be taken to the Versions page
- And I should see a table
 - I should see the table headers “Name”, “Published”, “~~Media Files~~”, and “Definition”
 - I should see a row for each published version of the form
 - And the versions should be sorted most recent to oldest
 - In the Name column, I should see the version string for that version
 - In the Published column, I should see the timestamp the version was published in standard format, and below that I should see the display name of the user who published it
 - If I am not an Administrator, then I should see the names as static text rather than links
 - When I click on the display name, I should be taken to their profile page

- ~~In the Media Files column, I should see the text “# files” reflecting the number of files associated with that version~~
 - ~~If there are no files, I should see the text “No files”~~
 - ~~If there is at least one file, I should see the text as a link~~
 - ~~When I click on the link, I should~~
 - ~~(option 1: see a modal with a read-only version of the files table)~~
 - ~~(option 2: start a download of a zip of the media files)~~
- In the Definition column, I should see Standard Form Definition Buttons (see appendix)

✓ 4.04a Create a new form version

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Forest Management Protocol [Back to Project Overview](#)

Intake Form

Overview Versions Submissions Settings

Right Now

20190502-final [View XML](#)

Current version of this form.

1,842 >

Submissions have been saved for this form.

No Current Draft

Draft

[+ Create a new Draft](#)

There is not currently a draft version of this Form. If you want to make changes to the Form or its Media files, you will want to start by creating a Draft using the button above.

Checklist

- When I am looking at my form
 - And there has already been at least one published version
 - And I do not currently have a draft version
- And I look at the greybox draft area in the form tab bar
 - Then I should see a button [+ Create a new Draft] in the tab bar below the text “Draft”
 - When I click on the button, I should be taken to the Status tab of my new form draft
 - And I should still see the existing form definition and media files
 - But I should see an empty test submissions table

✓ 4.05 See version statuses on Overview

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Forest Management Protocol [Back to Project Overview](#)

Intake Form

Overview Versions Submissions Settings

Right Now

20190502-final [View XML](#)

Current version of this form.

1,842 [>](#)

Submissions have been saved for this form.

Checklist

- ✓ **Publish your first draft version**
Great work! You have published your Form. It is ready to accept submissions. If you want to make changes to the Form or its Media Files, you can make a new draft. [Click here to find out more.](#)
- ✓ **Download form on survey clients and submit data**
Nobody has submitted any data to this form yet. App Users will be able to see this form on their mobile device to download and fill out. Right now, **4 App Users** in this Project have access to this form, but you can always add more. [Click here to find out more.](#)
- ✓ **Evaluate and analyze submitted data**
Once there is data for this form, you can export or synchronize it to monitor and analyze the data for quality and results. You can do this with the Download and Analyze buttons on the Submissions tab. [Click here to find out more.](#)
- ✓ **Manage form retirement**

Your Current Draft

20190503-fixed [View XML](#)

Draft version of this form.

- ✓ **Upload revised form definition (optional)**
If you have made changes to the form itself, including question text or logic rules, now is the time to [upload](#) the new XML or XLSForm.
- ✓ **Upload form media files**
Your form design references files that we need in order to present your form. You can upload new or updated copies of these for distribution under the [Media Files](#) tab. [Click here to find out more.](#)
- ✓ **Test the form on your mobile device**
It's a good idea to test the form to be sure it (still) works the way you expect. Using the [test QR code](#), you can make a test submission that won't affect your real data. [Click here to find out more.](#)
- ✓ **Publish the draft**
When you are sure your draft is ready and you wish to roll it out to your devices in the field, you can [publish](#) it. [Click here to find out more.](#)

- When I am on the Overview tab for a form,
 - And the form has a draft version
 - Then in the top-right of the page aligned with the greybox in the tab bar I should see a greybox with a heading Your Current Draft
 - Below the heading I should see the current draft version, same as I would see it in Right Now
 - Except that I should see “Draft version” instead of “Current version”
 - And below the draft version I should see the current checklist for the draft (see 4.23)

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Forest Management Protocol [Back to Project Overview](#)

Intake Form

Overview Versions Submissions Settings

Right Now

20190502-final [View XML](#)

Current version of this form.

1,842 >

Submissions have been saved for this form.

Draft

[+ Create a new Draft](#)

No Current Draft

There is not currently a draft version of this Form. If you want to make changes to the Form or its Media files, start by creating a Draft using the button above.

Checklist

- But if the form does not have a draft version
 - Then I should still see an aligned greybox
 - But in it I should see a heading “No Current Draft” and some explanatory text
- When I am on the Overview tab for a form,
 - I should see the Current Version box on the left
 - And in it I should find the current version string
 - But I should see “Published version of this form” rather than “Current version”
 - And I should see Standard Form Definition Buttons

Checklist

✓ Publish your first draft version

Great work! You have published your Form. It is ready to accept submissions. If you want to make changes to the Form or its Media Files, you can make a new draft. [Click here to find out more.](#)

✓ Download form on survey clients and submit data

Nobody has submitted any data to this form yet. App Users will be able to see this form on their mobile device to download and fill out. Right now, **4 App Users** in this Project have access to this form, but you can always add more. [Click here to find out more.](#)

- When I look at the checklist,
 - Instead of the “Create and upload Form” item, I should see a new item “Publish your first draft version” with text as shown above
 - And I should no longer see a checklist item for uploading Media Files
 - But the rest of the checklist should be as it is today

✓ See Draft state warning on Form Access tab

- When I am looking at the Form Access tab, and I look at a Form which does not yet have a published version,
- Then to the right of the State dropdown I should see an fa-edit icon
- And when I hover over the icon, I should get a tooltip that says “This Form does not yet have a published version. It will not appear on devices until a draft is published. When that happens, the settings shown here will be used.”

Other

Update Frontend dependencies

✓ Update Backend dependencies

Bugfixes

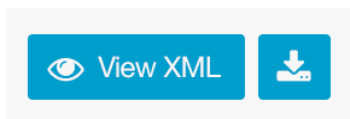
- b#256 crash on odata export when the xmlFormId contains unsafe characters
- b#253 disallow encrypted submissions that do not have instanceIds
- b#243 allow uploads of xml form media attachments

Improvements

- c#124 accept the itemsets.csv file generated in xlsform conversion
- b#250 enable support for annotate/signature widget with a default image

Appendix

Standard Form Definition Buttons



- I should see a “View XML” button.
 - When I click on the button, I should see the XML form definition nicely formatted in my browser.
- I should see a Download button that only has an icon in it.
 - If I uploaded an XLSForm to create the definition, then I should get a tooltip “Download XLSForm” when I hover over it. Otherwise I should get a tooltip “Download XML”.
 - When I click on the button, my browser should begin downloading the appropriate file.

Bugs Fixed + Small Wins

These items are automatically resolved by the above stories:

~~c#102 See the actual Form XML when previewing~~

4.22 Download Form XML or XLSForm

Release notes

- (none yet)

Later release

These items were considered during planning but pushed back to some later release. They are left here for future reference and copy+paste.

Offer client audits over OData?

Make backups configurable/directly triggerable

User analytics

- Frontend analytics on—page load events? Other things?
- Opt-in/out?

Other things

- f#244 Show tooltips on hover on date/times?
- Start thinking about pulling all the UI together
 - cf#170 styling secondary buttons
- Briefcase access panel w/ projid, link, whatever (per mmars)
 - Alternatively, add UI to Briefcase using the project list API?