

# Cúram 8.2

IEG in the Cúram Universal Access Responsive Web Application

# Note

Before using this information and the product it supports, read the information in  $\underline{\text{Notices on page}}$ 

# **Edition**

This edition applies to Cúram 8.2.

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# **Chapter 1 IEG in the Cúram Universal Access Responsive Web Application**

Universal Access uses forms to gather information about citizens, such as when they apply for benefits. Merative ™ Cúram Universal Access Responsive Web Application forms that gather data as evidence are implemented in IEG, as in the classic Universal Access citizen application. However, forms are now rendered in the browser by the IEG React Player, rather than the IEG Java™ player, and in some cases, the IEG behavior is different.

Script designers can find information describing form design and user experience best practices with proven patterns for forms in the IEG Form Design Guidance PDF located in the docs folder of the *Universal Access Responsive Web Application* asset zip file.

Due to the technology and user interface changes, your existing IEG scripts must be tested before use, and in most cases, at least some minor changes are needed for existing scripts to work in the new application.

The default connectivity handling in the Cúram Universal Access Responsive Web Application helps to prevent citizens losing data in IEG forms by preventing them from leaving pages with unsaved changes. For more information about data loss prevention in IEG, see the *Universal Access Responsive Web Application Guide*.

# Chapter 2 IEG elements and attributes specific to the design system and Cúram Universal Access Responsive Web Application

The following IEG elements and attributes apply to the design system and Cúram Universal Access Responsive Web Application only.

# · Display elements and attributes

- The combo-box element, which is a child element of the question element.
- The explainer element, which is a child element of the cluster, question-page, and relationship-page elements.
- The hint-text element, which is a child element of the container, list-question, and question elements.
- The next-button-label element, which is a child element of the question-page, relationship-page, and summary-page elements.
- The relationship-detail-header element, which is a child element of the relationship-summary-list element.
- The quick-add-list element, which is a child element of the relationship-page element.

# • Display element attributes

• The grouping-id attribute of the cluster element.

## • Flow-control element attribute

• The value 'hidden' for the loop-type attribute of the loop element.

# • Meta-display elements

- The class-names element, which is a child element of the layout element.
- The date-picker value for the type child element of the layout element.

For more information about IEG elements, see the *Authoring Scripts using Intelligent Evidence Gathering Guide*.

# Chapter 3 IEG configuration not currently supported for the Cúram Universal Access Responsive Web Application

The following IEG configuration is not currently supported by the Cúram Design System or the Universal Access Cúram Universal Access Responsive Web Application.

#### Ouestion matrices

Question matrices display a list of questions that are based on a code table and, for each of the code table values and each entity, a check box is displayed for you to select the values that apply to a particular entity.

# • Three-field date picker

The three-field date picker is no longer supported. Dates either default to a single-field date input field or can be configured with a date picker component by using the layout element.

# • Grouping individual question help at cluster level

Cluster-level help is supported, however, the compile.cluster.help property, which groups the help text for each of the questions in a cluster into the cluster help panel is not supported.

# • Display elements and attributes

- The custom-output element, which renders custom HTML on summary pages only.
- The show-page-elements attribute on the edit-link element for editing specific clusters.
- The footer-field element, which displays values that are calculated from expressions in the footer-row element of a list.
- The footer-row element, which adds an extra row at the end of a list to display total or summary information.
- The help-text element, which displays help text, is not supported for pages.
- The icon element, which is used to add images to either the title area of a page or the sections panel.
- The label-alignment element, which is used in the layout element for a cluster to control the text alignment of the labels in the cluster.
- The label-width element, which is used in the layout element for a cluster to control the width of the labels in the cluster.
- The num-cols element, which is used in the layout element for a cluster to control the number of columns in the cluster
- The type element, which is used in the layout element for a cluster to control the layout of labels in relation to input controls.
- The width element, which is used in the layout element for a cluster to control the width of the cluster on the page.

- The legislation element, which creates legislation links at page and question level to point to relevant legislative information.
- The policy element, which creates policy links at page and question level to point to relevant policy information
- The skip-field element, which enables a more flexible layout of elements within clusters or footer rows in lists where no visible display element is needed.
- The row-help element, which specifies help for rows in a list.
- The set-focus attribute of the question-page element, which sets focus for a page.

## • Meta-display elements

• The codetable-hierarchy-layout element, which is used in questions with a code table hierarchy type to control different aspects of the layout.

#### • Structural, administrative, and other elements and attributes

- The hide-for-control-question attribute on the ieg-script element, which hides the label and value of control questions for loops when the loop is entered.
- The highlight-validation attribute on the ieg-script element. Validations are now always displayed with the failing input field.
- The show-progress-bar attribute on the ieg-script element. Progress through sections is now indicated by text and the section title. For example, STEP 2 OF 4 · HOUSEHOLD.

For more information about IEG elements, see the the *Authoring Scripts using Intelligent Evidence Gathering Guide*.

# Chapter 4 Customizing the Back button in IEG forms

You can customize the behavior of the Back button in IEG forms to suit your applications.

For the best user experience, set the behavior of the **Back** button in IEG according to whether you have a single form or multiple forms in your application. Where you have multiple forms, you typically want to navigate back to the previous form.

- Where you have a single form, always disable the **Back** button on the first page of the IEG form. The **Back** button goes back one page in the form, not in the application, so you don't need one on the first page. For more information about the show-back-button element, see the *Authoring Scripts using Intelligent Evidence Gathering Guide*.
- Typically, an application has multiple forms. By default, a feature with two forms, Apply and Submit is provided in the universal-access-ui package. The default feature has two instances of BaseFormContainer, ApplicationFormContainer and SubmissionFormContainer.

By default, the Apply form has the **Back** button disabled on its first page.

In Cúram Universal Access Responsive Web Application 3.0.4 or later, the **Back** button of the Submit form goes to the Apply form in the SubmissionFormContainer component by default.

If you are customizing or overriding SubmissionFormContainer component, or using an earlier version, you must add some code to the SubmissionFormContainer component to ensure that the **Back** button goes to a previous form.

• Add a function to the component logic, for example:

```
handleBackForFirstPage = () => {
  const { history, submissionFormDetails } = this.props;
  const { applicationFormId } = submissionFormDetails;
  history.push({
    pathname: `${PATHS.APPLY}}/${applicationFormId}`,
  });
};
```

• Then, inside the render function, pass the function to the BaseFormContainer component by using the onBackForFirstPage prop, for example:

```
const { submissionFormDetails, match } = this.props;
RESTService.handleAPIFailure(this.props.createApplicationUsingFormDetailsError);
   RESTService.handleAPIFailure(this.props.createSubmissionFormError);
   RESTService.handleAPIFailure(this.props.deleteApplicationFormError);
   RESTService.handleAPIFailure(this.props.getSubmissionFormDetailsError);
   if (match.params.submissionFormId && submissionFormDetails) {
     return (
       <BaseFormContainer</pre>
         iegFormId={match.params.submissionFormId}
         iegHookBindingKey={HookBindings.SUBMISSION}
         onBackForFirstPage={this.handleBackForFirstPage}
         onExit={this.handleExit}
         onFinish={this.handleFinishScript}
         onSaveAndExit={this.handleSaveAndExit}
         title={ (submissionFormDetails &&
submissionFormDetails.applicationTitle) || ''}
    );
   return <AppSpinner />;
```

For more information about the onBackForFirstPage property, see <u>Chapter 16 Customizing</u> script behavior with BaseFormContainer on page 45.

# **Chapter 5 Configuring section navigation for forms**

If you are developing scripts in IEG, you can enable section navigation to guide people through forms.

# **About this task**

You can use section navigation on any forms, but it is particularly useful for longer forms. If you enable section navigation, it is a good idea to use section summary pages so that users can review their changes regularly.

# **Procedure**

In your IEG script, add the show-section element to the ieg-script element.

# **Chapter 6 Configuring progress information for forms**

If you are developing pages in IEG, you can show progress text and the section title so citizens can see where they are in the script, for example, STEP 2 OF 4 · HOUSEHOLD.

Add the following IEG configuration property to the *ieg-config.properties* file to configure the text. The section title is added automatically.

```
\# Text progress bar indicator progress.bar.indicator.text=Step \$1s of \$2s
```

Where \$1s\$ is the current step number and the \$2s\$ is the total number of steps on the script. The message is calculated based on the total number of sections and the current section.

The IEGPageMetadata(JSON); component contains all of the metadata for each IEG form. The text progress indicator is displayed if IEGPageMetadata finds the metadata['ieg-config'] ['progress-indicator'] element in the JSON.

# **Chapter 7 Configuring dynamic titles on forms**

If you are developing pages in IEG, you can configure the relationship pages with more relevant titles that are based on the user's responses.

The relationship page title accepts an International Components for Unicode (ICU) message template. Page titles and subtitles accept a specific formatting syntax based on ICU. It should be used in loops and will give more context to the users.

These six keywords are defined:

- index
- innerIndex
- outerIndex
- ordinal
- innerOrdinal
- outerOrdinal

You can use index and ordinal in simple non-nested loops. If they are used in a nested loop, it is synonymous to outerIndex and outerOrdinal.

Refer to these examples.

```
"Add {ordinal} member" displays Add first member, Add second member, ...
```

"Add the {innerOrdinal} income for the {outerOrdinal} member" displays Add the first income for the first member ...

"{index, select, 0 {Add your {innerOrdinal} income} other {Add %1s's {innerOrdinal} income}}" displays Add your first income or Add Jane's first income depending on the value of index (this is equal to ordinal - 1).

"Ajouter la {ordinal}#feminine# personne" displays Ajouter la première personne.

"Ajouter la {innerOrdinal}#feminine# recette du {outerOrdinal}# %spellout-ordinal-masculine# membre" displays Ajouter la première recette du premier membre.

You can define the title as follows:

```
{index, select, 0 {Your relationships} other {{personName}'s relationships}}
```

The outcome of this message template on the first relationship question page is **Your** relationships. On the following relationship question pages, it shows [personName]'s relationships. The reserved word personName displays the person's first name on the title of the page.

# **Chapter 8 Configuring rich text on forms**

You can configure rich text to display with a number of IEG display elements in IEG forms. You can also configure external links in rich text to open in a new tab or window.

#### About this task

Rich text is supported in the following IEG display elements that support text:

- cluster title, help, and description
- container title, help, and description
- display-text
- divider
- list title, help, and description
- question label and help
- subtitle

For more information about IEG elements, see the *Authoring Scripts using Intelligent Evidence Gathering Guide*.

# 8.1 Configuring external links to open in a new tab or window

You can configure external links to open in a new tab or window in IEG forms. By default, links open in the current tab.

#### About this task

For security reasons, HTML in rich text is sanitized to remove certain attributes before display, including the HTML target attribute. You must configure the rich text to leave the target attribute in the sanitized content so that the link opens in a new tab or window.

For example, the <a href="myurl">my link</a> link in rich text opens in the current tab as intended. The <a href="myurl" target="\_blank">my link</a> link is intended to open in a separate tab or window. However, because the rich text is sanitized with DOMPurify before display, the target attribute is removed and the link opens in the current tab by default.

To configure DOMPurify to leave specific attributes, you must add <code>dompurify</code> to the dependencies and specify a DOMPurify persistent configuration in any JavaScript or JSX code that runs when the app is loaded. For example, <code>App.js</code>. For more information about DOMPurify, see <a href="https://github.com/cure53/DOMPurify#persistent-configuration">https://github.com/cure53/DOMPurify#persistent-configuration</a>.

Only one active configuration at a time is allowed. After you set the configuration, any extra configuration parameters that are passed to <code>DOMPurify.sanitize</code> are ignored. The <code>DOMPurify</code> configuration persists until the next call to <code>DOMPurify.setConfig</code>, or until <code>DOMPurify.clearConfig</code> is called to reset it.

# **Procedure**

1. Add dompurify to the dependencies in the package. json file.

```
npm install dompurify
```

**2.** To configure DOMPurify to leave the target attribute, specify the following DOMPurify persistent configuration in any JavaScript or JSX code that runs when the app is loaded.

```
import DOMPurify from 'dompurify';
DOMPurify.setConfig({ ADD_ATTR: ['target'] });
```

# **Chapter 9 Configuring hint text for forms**

You can use short sentences of hint text to explain the expected input format or content in IEG forms. For example, you can explain the expected format for a telephone number.

#### About this task

Hint text is suitable for short sentences and does not support HTML tags. If you want to add more text or format text with HTML tags, use the help-text or explainer elements instead. For more information, see the *Authoring Scripts using Intelligent Evidence Gathering Guide*.

**Note:** Specific globalization considerations apply to the date format when it is used in hint text and messages. Ensure that you have the same date format in the REACT\_APP\_DATE\_FORMAT environment variable, and in the DateAdapter\_DateFormat and Errors\_date messages in the intelligent-evidence-gathering-locales package.

#### **Procedure**

In your IEG script, you can add the hint-text element to any container, question or list-question element.

## For example:

Container

Question

List question

# **Chapter 10 Configuring explainer text for forms**

You can use the explainer element to provide extra text in IEG forms that is initially hidden and that can be expanded to show further explanation. For example, you can provide background information that a user can choose to expand only if needed.

#### About this task

You can use the explainer element to provide a large amount of text without cluttering up the form. For more information, see the *Authoring Scripts using Intelligent Evidence Gathering Guide*.

#### **Procedure**

In your IEG script, add the explainer element to any cluster, question-page, or relationship-page element.

# For example:

• cluster

• question-page

```
<question-page>
<explainer>
  <title id="ExplainerSSN.Title">Why do we ask for your Social Security Number?</title>
     <description id="ExplainerSSN.Description">Your Social Security Number ensures that your application is unique to you and reduces processing time.</description>
     </explainer>
  </question-page>
```

relationship-page

```
<relationship-page>
<explainer>
  <title id="ExplainerSSN.Title">Why do we ask for your Social Security Number?</title>
  <description id="ExplainerSSN.Description">Your Social Security Number ensures that your application is unique to you and reduces processing time.</description>
  </explainer>
  </relationship-page>
```

# Chapter 11 Configuring the 'Help' label for forms

You can change or remove the 'Help' label from the help icon for input controls in the application by overriding the default text. To remove the label, override the default text with a single space character in a custom messages file.

#### **Procedure**

1. Create a src/locale/messages\_en.json messages file with a single space character as the value for the help label message ID, WidgetHelp helpToggleText.

```
{
    "WidgetHelp_helpToggleText": " "
}
```

2. Update the src/config/intl.config.js file in the English locale to point to the custom messages file.

```
// [...] {
    locale: 'en',
    displayName: 'English',
    localeData: () => {
        require('@formatjs/intl-pluralrules/locale-data/en');
        require('@formatjs/intl-relativetimeformat/locale-data/en');
    },
    messages: require('../locale/messages_en'),
    },// [...]
```

**3.** Rebuild and deploy the application to see your changes.

# Chapter 12 Configuring required or optional labels for form fields

You can choose whether to indicate the required fields or the optional fields in IEG forms. As the majority of questions in a typical form should be required, indicating the optional questions rather than the required questions typically results in a less cluttered form. By default, optional fields are highlighted in IEG forms.

# About this task

By default, fields that are not configured as required in the IEG script are labeled as **Optional** and required fields are not labeled. If you choose to indicate required fields instead, fields that are configured as required in the script are labeled **Required** and optional fields are not labeled.

#### **Procedure**

Show labels for required questions only by adding the REACT\_APP\_DISPLAY\_REQUIRED\_LABEL environment variable to your .env file with a value of true. For example:

REACT APP DISPLAY REQUIRED LABEL=true

# **Chapter 13 Configuring input formats and constraints** for form fields

You can customize field inputs and constraints on IEG forms, such as phone numbers, social security numbers (SSN), dates, currencies, and percentages. You can adjust the width of form fields to match the length of the expected input, and choose to use a date picker for dates where appropriate.

# About this task

Where users need to type confidential information, you can obscure the input values to ensure privacy. This configuration is done in the data store schema by setting a new data type and cannot be used with masks. Instead of using a mask, you can also implement any extra constraints, such as the number of characters, in the data store schema by creating a custom domain, see 13.4 Configuring inputs to be obscured for privacy on page 37.

Masked input fields increase input field readability by formatting or constraining typed data. You can apply input masks with the IEG class-names element, which is a child element of the layout element. The class-names element adds the content of the element to the HTML that is generated for the component, this element accepts multiple values that are separated by a space. For more information about the IEG layout element, see the *Authoring Scripts using Intelligent Evidence Gathering Guide*.

You might need a custom mask that is not supported by the class-names element, such as variants of the Social Security Number (SSN) or Social Insurance Number (SIN). To create a custom mask, use the mask-format element, which is a child element of the layout element, to set custom masks with Cleave.js format.

## • Input field masks

If the class name matches any of the reserved input mask class names, that class name is applied to the HTML control input. If the class name does not match a reserved input mask class name, the class name is applied to the <div> element that contains the HTML element (cluster, question, or list-question). You can use the following design system CSS classes as input masks to format and constrain input values for questions:

wds-js-input-mask-currency

Masks input for currencies. The character limit is 21 characters. You can also set optional environmental variables for currency symbols, see <u>13.3 Configuring currency symbols on page 37</u>.

• wds-js-input-mask-numeral

Masks input for numerical input.

• wds-js-input-mask-yyyy-mm-dd

Masks input for the YYYY-MM-DD date format.

• wds-js-input-mask-percentage

Masks input for percentage characters.

• wds-js-input-mask-phone

Masks input for phone number fields according to the defined locale for the application. Configuring the phone number input mask requires some additional steps and you can also set optional environmental variables for delimiters and country codes, see <u>13.1 Configuring phone numbers on page 35</u>.

wds-js-input-mask-postal-code

Masks input for 2 groups of 3 characters that are separated by a space, XXX XXX, such as a Canadian postal code. Alphabetic characters are converted to uppercase.

• wds-js-input-mask-sin

Masks input for 3 groups of 3 characters that are separated by spaces, XXX XXX XXX, such as a Canadian Social Insurance Number (SIN).

wds-js-input-mask-ssn

Masks input for digits that are separated by dashes and grouped as follows, XXX-XX-XXXX, such as a US social security number (SSN).

• wds-js-input-layout-size--field size

Adjusts the width of form fields to match the length of the expected input. Where field size is one of the following sizes:

• x-small

Use for 2 - 3 characters, such as DD, MM, or title.

• small

Use for 4 - 6 characters, such as ZIP code, postal code, or CVV number.

• medium

Use for around 8 characters, such as SSN or DD/MM/YYYY.

large

Use for around 16 characters, such as credit card numbers.

x-large

Use for around 24 characters, such as email addresses.

## · Form field width

To avoid confusion about expected inputs, always match the width of form fields to the expected input. For example, use a form field that matches the length of the SSN.

# Date picker

For date questions, in addition to the masked input, you can choose to add a date picker for dates by setting the value of the type child element of the layout element to date-picker. For those questions, you can then use the calendar or type the date. By default, date questions are displayed with the masked input field if no layout type is specified.

#### **Procedure**

1. In your IEG script, add the appropriate CSS classes to the layout element for the question. For example:

2. If you want to add a custom mask, use a mask-format element in the layout element. Define the mask-format text value by using an XML CDATA section with a JSON object with reference to the <u>Cleave.js</u> documentation, For example,

# 13.1 Configuring phone numbers

You can configure an input mask class name to format phone number fields in IEG forms according to the defined locale for the application. You can also configure a phone number delimiter or a country prefix if needed.

#### **Procedure**

1. Add cleave. js as a dependency in your package. json file.

```
"cleave.js": "<version>"
```

Where *version* is the version that you want to use.

2. Import the region-specific . 7s file in your initializing . 7s file.

For example:

```
import 'cleave.js/dist/addons/cleave-phone.[country]';
```

Where *country* is the locale that you want to use.

3. Add a REACT APP PHONE MASK FORMAT environment variable to your .env file.

```
REACT_APP_PHONE_MASK_FORMAT=[country]
```

Where *country* is the locale that you want to use.

**4.** In your IEG script, add the wds-js-input-mask-phone class name to the question. For example:

**5.** Optional: You can set a custom delimiter for phone numbers by adding the REACT\_APP\_PHONE\_MASK\_DELIMITER environment variable to your .env file. For example, to convert 1 636 5600 5600 to 1-636-5600-5600, set the environment variable as follows:

```
REACT_APP_PHONE_MASK_DELIMITER=-
```

**6.** Optional: You can set a fixed country code for phone numbers by adding the REACT\_APP\_PHONE\_MASK\_LEFT\_ADDON environment variable to your .env file. For example, to convert 1-636-5600-5600 to +1-636-5600-5600, set the environment variable as follows:

```
REACT_APP_PHONE_MASK_LEFT_ADDON=+
```

# 13.2 Configuring date formats

You can configure the date format in IEG forms by setting the REACT\_APP\_DATE\_FORMAT environment variable.

## About this task

By default, the date format is MM/DD/YYYY if you do not set a value for the REACT\_APP\_DATE\_FORMAT environment variable. If you set an invalid value, the default date format is used.

The valid values are:

```
dd-mm-yyyy
mm-dd-yyyy
yyyy-mm-dd
```

**Note:** Specific globalization considerations apply to the date format when it is used in hint text and messages. Ensure that you have the same date format in the REACT\_APP\_DATE\_FORMAT environment variable, and in the DateAdapter\_DateFormat and Errors\_date messages in the intelligent-evidence-gathering-locales package.

# **Procedure**

Change the date format by adding the REACT\_APP\_DATE\_FORMAT environment variable to your .env file.

For example, to change the date format to DD/MM/YYYY, set the environment variable as follows:

```
REACT_APP_DATE_FORMAT=dd-mm-yyyy
```

**Note:** The date display format supports the forward slash (/) date separator character only. However, when you specify the date configuration you must use the dash (-) character. For example, yyyy-mm-dd. The use of a custom date separator character is not supported.

## 13.3 Configuring currency symbols

You can configure the currency symbol that is displayed for currency fields in IEG forms. Configure the REACT\_APP\_CURRENCY\_MASK\_ADDON environment variable to specify a currency symbol to display either before or after the currency amount. The alignment of the currency symbol is based on the locale.

#### About this task

For more information about how the currency symbol is aligned based on locale, see the developer.mozilla.org documentation.

The value of the REACT\_APP\_CURRENCY\_MASK\_ADDON environment variable takes precedence over the deprecated REACT\_APP\_CURRENCY\_MASK\_LEFT\_ADDON and REACT\_APP\_CURRENCY\_MASK\_RIGHT\_ADDON environment variables.

#### **Procedure**

Use the following option to configure and align the currency symbol based on the locale by configuring the REACT APP CURRENCY MASK ADDON environment variable.

• Add the REACT\_APP\_CURRENCY\_MASK\_ADDON environment variable to your .env file. For example, to set the currency symbol to US dollars, enter the following command:

```
REACT_APP_CURRENCY_MASK_ADDON=$
```

Use the following deprecated option to explicitly align the currency symbol on either the left side or the right side.

•

Add a currency symbol for currency fields by adding the REACT\_APP\_CURRENCY\_MASK\_LEFT\_ADDON or REACT\_APP\_CURRENCY\_MASK\_RIGHT\_ADDON environment variables to your .env file. For example, to set the currency symbol for US dollars, enter the following command to set the environment variable:

```
REACT_APP_CURRENCY_MASK_LEFT_ADDON=$
```

If both environment variables are set, REACT\_APP\_CURRENCY\_MASK\_LEFT\_ADDON takes precedence.

## 13.4 Configuring inputs to be obscured for privacy

Where users need to type confidential information, you can obscure the input values to ensure privacy. Users can show or hide the text as they type. The user input is obscured when they type the confidential information, such as their Social Security Number (SSN). By default no constraints are applied, but you can create a custom domain to apply custom constraints where needed. For example, you can restrict the number of characters.

#### About this task

You can obscure inputs by setting the data type for a specified attribute of an entity to <code>IEG\_OBSCURED</code> in the data store schema. This configuration cannot be used with masks. Instead of using a mask, you can also implement any extra constraints, such as the number of characters, in the data store schema by creating a custom domain.

For more information about data types and IEG domains, see the *Authoring Scripts using Intelligent Evidence Gathering Guide*.

For more information about data store schemas, see the *Authoring Scripts using Intelligent Evidence Gathering Guide*.

#### **Procedure**

- 1. In the entity, identify the attributes for which you want to obscure the input. For example, the ssn attribute for the social security number.
- Edit the data store schema .xsd file for the IEG script and in the entity, change the type of the attribute to IEG\_OBSCURED.
   For example,

```
<xsd:attribute name="ssn" type="IEG_OBSCURED"/>
```

- **3.** Optional: To apply further input constraints to the field, create a custom domain. For example, to constrain the user from typing more than 9 characters in the input field for an SSN, you can create a custom domain called SSN\_OBSCURED.
  - a) Create a custom domain like the following domain.

b) Edit the data store schema .xsd file for the IEG script and change the type of the ssn attribute to SSN\_OBSCURED.
 For example,

```
<xsd:attribute name="ssn" type="SSN_OBSCURED"/>
```

## Chapter 14 Configuring code-table hierarchies for form fields

You can use code-table hierarchies to add two related questions in IEG forms. When you answer the first question, the second question is enabled.

#### About this task

Any question where the data type is defined as a code table hierarchy is displayed as two separate questions in vertically aligned drop-down menus. The first question menu corresponds to the root code table in the hierarchy, and displays the label that is specified for the question. The second question menu corresponds to the second-level code table in the hierarchy, and displays a label that corresponds to the code table display name. The second menu is disabled until a selection is made in the first menu. Summary pages display both questions.

Displaying a code-table hierarchy value in a list, or the codetable-hierarchy-layout options, are not supported.

#### **Procedure**

To ensure that the label is displayed correctly for the second question, you must ensure that, for each code table name element, there is a corresponding locale element within the displaynames element in your code-table definition.

For example, see the following code-table definition.

```
<codetables package="curam.codetable" hierarchy_name="CountyCityHierarchy">
    <!-- Parent codetable - County -->
    <codetable java identifier="COUNTYCODE" name="CountyCode">
        <displaynames>
            <name language="en">County</name>
            <locale language="en">County</name>
        </displaynames>
        <!-- code items... -->
    </codetable>
    <!-- Child codetable - City -->
    <codetable java identifier="CITYCODE" name="CityCode"</pre>
parent_codetable="CountyCode">
        <displaynames>
            <name language="en">City</name>
            <locale language="en">City</name>
        </displaynames>
       <!-- code items... -->
   </codetable>
</codetables>
```

### Chapter 15 Implementing a combo box for form fields

You can implement a combo box question with an auto-complete search function to help you to complete form fields in IEG forms as you type. For example, known address fields can be automatically selected when you enter an address. You can implement the option to add new items if they are not found, for example, add an address.

#### About this task

You must implement a search function in the Cúram Universal Access Responsive Web Application and register the search function with <code>IEGRegistry</code>. The search function can point to an internal or external search service to provide the information. Then, update the datastore schema definition and your IEG script.

## 15.1 Implementing search functions for ComboBox components

You can implement the ComboBox component to search external data sources as you type in a form field, with a built-in filter function. Implement a search function and associated error handling, and make that search function available to the IEG form. If needed, you can implement an **Add New** option so that users can add an item if it is not found.

#### **Procedure**

1. Implement the search function. A search function is a JavaScript<sup>™</sup> function that receives one parameter that contains the value of the ComboBox, and returns an array of items to be displayed by the ComboBox.

The response of search-function is an array of items, {items}. Each item is an object with the following structure:

```
{
  id:"key"
  value:"value"
  item: { "attribute1": "value1", "attribute2": "value2" },
}
```

#### Where:

- id is a mandatory attribute to store the ID in the data store.
- value is the value of the question to store in the data store and to render in the list of options of the ComboBox.
- item is an optional complex object with the structure of the formData to be populated if that element is selected in the ComboBox component.

The structure of the item object must match the formData of the target entity. The following simple example populates the ResidentialAddress entity:

```
{
  'street1': 'street1',
  'street2': 'street2',
  'city': 'city',
  'zipCode':' zipCode',
  'state': 'state',
}
```

- 2. Register the search function with the IEGRegistry object. IEGForm has access to IEGRegistry and all registered functions. IEGForm reads the custom functions from IEGRegistry and stores them on its formContext so IEGForm can call custom functions.
  - **1.** Implement the JavaScript<sup>TM</sup> function in any .js file.
  - 2. Import IEGRegistry in a JavaScript<sup>™</sup> initial file, such as App.js, and add the custom function to the registry. For example:

```
import { IEGRegistry } from '@spm/core';
import { searchCity, customFunction } from './examples/playground/
customFunctions';
...

const App = () => {
   IEGRegistry.registerComboBoxSearchFunctions({ searchCity, customFunction });
   ....
};
```

#### **Add New option**

If you want to render an **Add New** option in the menu that is displayed by the ComboBox, the response of the JavaScript<sup>TM</sup> function must follow the structure:

```
{
   newItem: { id: '-1', label: 'Add New', value: ' ', position: 'top' },
   items,
}
```

#### Where:

- newItem is a complex object with the definition of the Add New option.
- id is the ID of the new option.
- label is the label of the new option.
- value is the value of the new option.
- position is the position where the new option renders. The possible values are bottom and top.

#### **Error messages**

The search function must implement its own logic to handle errors if an error needs to be displayed on the UI, the response of the search function must be:

```
{errorMessage: 'Controlled Error Message'}
```

The error message is displayed underneath the ComboBox.

### 15.2 Configuring combo box scripts and schemas

Add the combo-box element to a question in your IEG script and configure the combo-box element attributes. Add a cluster after the question to display the information to the user when they select a menu item. Update the schema definition with the appropriate elements.

#### About this task

The question schema type must be a string. You cannot use a question with a combo-box child element as a control question.

You can review the design system usage guidance for the ComboBox component. In your development environment, open the Social Program Management Design System Storybook documentation at path>@govhhs/govhhs-design-system-react/doc/index.html and search for ComboBox.

For more information about the IEG combo-box element, see the *Authoring Scripts using Intelligent Evidence Gathering Guide*.

#### **Procedure**

1. Add the combo-box child element to the question element. For example:

```
<question-page id="AboutTheApplicant_GB" read-only="false" set-focus="false" show-back-button="true" show-exit-button="true" show-next-button="true" show-person-tabs="false" show-save-exit-button="true" entity="Person" >

<!-- ComboBox -->
<cluster entity="SearchAddress">
        <title id="SearchAddress.Title">Your address</title>
        <question id="fullAddress" mandatory="true" show-field-help="false">
        <label id="FullAddress.Label">Search for your address</label>
        <combo-box key="id" search-function="searchAddress" target-entity="ResidentialAddress" filter-items="true" />
        </question>
        </question-page>
```

#### Where:

- key is the id to be stored in the data store and renders as a hidden widget on the front end. It is mandatory and the entity must define this property in the schema definition. The key schema type must be a string.
- search-function is the name of the JavaScript $^{\text{TM}}$  search function to be called on each keydown event.
- target-entity is an optional attribute to show information to the user when they select a combo box menu item. In target-entity, specify the cluster entity to be populated with the value of the search-function result item attribute. Update the script to display the cluster entity on the page, the target entity must be shown on the same page as the combo box. If more than one cluster on the page is related to the same entity name, the first cluster that matches the entity attribute value with the target-entity value is populated.
- filter-items is an optional attribute that, if true, filters the items as you type with the built-in filter. By default, it is false.

2. Add a cluster to display the target-entity information when a user selects a menu item.

```
<question-page id="AboutTheApplicant_GB" read-only="false" set-focus="false" show-back-button="false" show-exit-button="true" show-next-button="true" show-person-</pre>
tabs="false" show-save-exit-button="true" entity="Person" >
<!-- ComboBox -->
<cluster entity="SearchAddress">
  <title id="SearchAddress.Title">Your address</title>
  <question id="fullAddress" mandatory="true" show-field-help="false">
  <label id="FullAddress.Label">Search for your address</label>
  <combo-box key="id" search-function="searchAddress" target-</pre>
entity="ResidentialAddress" filter-items="true" />
</question>
</cluster>
<!-- ComboBox -->
<cluster entity="ResidentialAddress">
        <title id="Address.Title">Enter address</title>
        <help-text id="ADHelp">You must enter the address in which you physically
reside (residential address).</help-text>
<question control-question="false" id="street1" mandatory="true" multi-</pre>
select="false" show-field-help="false">
          <label id="Street1.Label">Street 1</label>
        </guestion>
<label id="Street2.Label">Street 2</label>
        </question>
        <question control-question="false" id="city" mandatory="false" multi-
select="false" show-field-help="false">
          <label id="City.Label">City</label>
        </question>
        <question control-question="false" id="zipCode" mandatory="false" multi-
select="false" show-field-help="false">
          <label id="Zipcode.Label">ZIP code</label>
        </question>
</cluster>
 </question-page>
```

**3.** Edit the schema definition and add an element for the combo box and the target entity, for example:

```
<!-- ComboBox -->
<xs:element name="SearchAddress">
      <xs:complexType>
           <xs:attribute name="id" type="IEG STRING" />
           <xs:attribute name="fullAddress" type="IEG STRING"/>
      </xs:complexType>
</xs:element>
<!-- Target Entity --> 
<xs:element name="ResidentialAddress">
  <xs:complexType>
   <xs:attribute name="street1" type="IEG_STRING"/>
<xs:attribute name="street2" type="IEG_STRING"/>
   <xs:attribute name="city" type="IEG_STRING"/>
   <xs:attribute name="zipCode" type="IEG STRING"/>
  </xs:complexType>
 </xs:element>
2. Associate that new element to a Person entity.
<xs:element name="Person">
 <xs:complexType>
  <xs:sequence minOccurs="0">
   <xs:element ref="SearchAddress" minOccurs="0" maxOccurs="1"/>
   <xs:element ref="ResidentialAddress" minOccurs="0" maxOccurs="unbounded"/>
  </xs:element>
</xs:complexType>
```

## Chapter 16 Customizing script behavior with BaseFormContainer

The behavior of scripts in the application is controlled by the <code>BaseFormContainer.js</code> container component. Each form calls this container component, which controls script behavior such as whether partial submission is allowed, or where to go on exiting the script. You can customize the behavior for individual scripts by modifying <code>BaseFormContainer</code> properties.

#### About this task

The following BaseFormContainer properties are available:

- iegFormId. (Mandatory) This property corresponds to the IEG execution ID that is obtained from one of the following options:
  - An API that starts the script, by creating the execution with the necessary script ID and data store schema.
  - Existing executions that can be resumed.

**Note:** Later, the ID is used on the server to ensure that the current user matches the user who is associated with the execution in the <code>CitizenScriptInfo</code> table. The ID also ensures that the execution is not completed.

- title. (Mandatory) The title to be displayed in the header. You can convert the property by using the formatMessage for react-intl.
- isLoginOrSignupAllowed. If the property is true when Save and exit is clicked and the user is not logged in, the log-in screen is displayed. The default value is **True**.
- isPartialSubmissionAllowed. Specifies that partially completed scripts can be submitted. The corresponding option must be added to the header. The default value is **False**.
- onExit. Specifies what happens when a user exits the script without saving. By default, it goes to the home page.
- onFinish. Specifies what happens when the last page of the script is submitted. By default, it goes to the home page.
- onPartialSubmission. Specifies what happens when a partial script is submitted. By default, it saves the current page and then starts the OnFinish handler.
- onSaveAndExit. Specifies what happens when a user saves and exits the script. By default, it saves the current page and determines what page to go to. If the user is not logged in, the login page is displayed. If the user is logged in, the dashboard is displayed.
- onRef. A function that receives the instance of the current BaseFormContainer to provide access to its defined functions and props. You can use this function to customize the default BaseFormContainer functions. For an example of using the onRef function to customize the behavior of Save and exit, see the SampleApplicationFormComponent in the sampleApplication.
- onBackForFirstPage. A function that is called on the back-button click event of the first page of a form to redirect back to another form. The function contains the code responsible

for the redirection. For example, you might want to go back to an application script from a submission script to change something before you submit an application.

#### **Procedure**

To modify the behavior for an existing form feature, follow the standard steps in Reusing existing features. For example, to customize the form that is loaded from the /eligiblity/form URL, do the following steps:

- Find the path variable in the node\_modules/@spm/universal-access-ui/ routes/Paths.js file.
   For example, search for /eligibilty/form to locate PATHS.ELIGIBILITY.FORM.
- 2. Search the Routes file for the path variable to find the location of the feature that it loads. For example, in the node\_modules/@spm/universal-access-ui/src/routes/Routes.js file search for the PATHS.ELIGIBILITY.FORM path variable that you located in the previous step. The path variable maps to the feature/Forms/Eligibility location.
- **3.** Copy the source code from the feature folder that you identified in the previous step to your custom folder.
  - For example, copy node\_modules/@spm/universal-access-ui/src/features/Forms/Eligibility to the your-custom-app/src/features/Forms/Eligibility folder.
- **4.** Add a route in the *your-custom-app/src/routes.js* file with the same path as the original PATHS.ELIGIBILITY.FORM feature.
  - a) Map the new route to your custom version of the form feature.
- **5.** Update the properties of the form container according to your requirements. For example, use custom functions to change the behavior of the on-exit and on-finish flows, as shown in the following code sample:

```
<BaseFormContainer
    iegFormId={formId}
    iegHookBindingKey={HookBindings.SCREENING}
    onExit={this.myCustomHandleExitForm}
    onFinish={this.myCustomHandleFinishForm}
    title={myCustomTitle || ''}
/>
```

## Chapter 17 Merging clusters with the cluster element grouping-id attribute

If you are developing pages in IEG, you can merge several clusters on summary pages by using the **cluster** element **grouping-id** attribute. The **grouping-id** attribute is not supported for standard Cúram web applications.

Related data fields can be defined within different clusters under the following conditions. You can use the **grouping-id** attribute to merge these related data fields into a single cluster on IEG pages.

- Data is defined within different schema entities but a single cluster can be defined for a single entity only.
- Data is defined within a conditional cluster but it must be included in a non-conditional cluster when the condition is met.

All clusters with a specific grouping-id attribute are merged into the first cluster with that grouping-id attribute. Aside from the questions, the cluster elements are shown as defined by the first cluster. Ensure that the other cluster elements in the first cluster, such as the title or buttons, are suitable for the merged cluster.

Where possible, do not have a conditional cluster as the first cluster if you are merging conditional and non-conditional clusters. If the first cluster is conditional and the condition is not met, then the merged cluster is not displayed. If a conditional cluster must be positioned before non-conditional clusters in a merged cluster, then add a non-conditional cluster with no questions as the first cluster with the **grouping-id**.

This sample XML snippet merges three clusters into a single cluster with the **grouping-id** attribute. The three clusters have data fields from three different entities and the last cluster is conditional.

```
<edit-link
   skip-to-summary="false"
   start-page="AboutTheApplicant GB"
 <layout>
   <type>flow</type>
    <num-cols>2</num-cols>
   <label-alignment>left</label-alignment>
  </layout>
 <question
   id="street1"
   <label id="Street1.Label">Street 1:</label>
 </question>
</cluster>
<cluster entity="Person" grouping-id="100">
 <question
   id="applyToMailingAddress"
   <label id="ApplyToMailingAddress.Label">Mail to Same Address?</label>
</cluster>
<condition expression="Person.applyToMailingAddress==&quot;N2OITYN2&quot;">
        <cluster entity="MailingAddress" grouping-id="100">
    <question
      id="street1"
     <label id="Street1.Label">Street 1:</label>
   </question>
</cluster>
```

### **Chapter 18 Configuring relationship pages questions**

If you are developing pages in IEG, you can configure the text of the relationship questions on relationship pages.

By default, the question label is dynamic, in the first relationship question page, it renders as "What is [Name and Age of the Person related] to you?". On the following relationship question pages, it renders "What is [Name and Age of the Person related] to [Name and Age of the Person]?

The attribute name for the start date must be startDate.

To show age in the relationship question label, you must populate the date of birth, which is defined as the dateOfBirth attribute of the Person entity.

You can use the following IEG configuration property to configure the default text.

```
\# relationship question label on relationship page relationship.question.label={index, select, 0 {What is $2s$ to you?} other {What is $2s$ to $1s?}}
```

The example ICU template does the following:

In the first iteration:

```
What is %2s to you?
```

Where \$2s is the related person in the first iteration.

From the second iteration until the end:

```
What is \$2s to \$1s?
```

Where %2s is the new main person in the iteration and %2s is the related person in the iteration.

# **Chapter 19 Configuring relationship starting dates on relationship summary pages**

If you are developing pages in IEG, you can configure the start date of relationships for relationship summary pages. For example, Married since Jun 12, 2014.

You can use the following IEG configuration property to configure the default text.

```
# relationship type and start date label.
relationship.type.date.label=%1s since %2s
```

Where \$1s is the relationship type and \$2s is the relationship start date.

## Chapter 20 Configuring quick-add-list

The quick-add-list feature is enabled at the IEG script level. The quick-add-list component receives two parameters, entity with the Entity object is managed by the component and criteria with any specific criteria that the component might need to meet.

#### Common pattern

The code that follows is an example of a fully functional implementation of the quick-add-list component in a section of an IEG script:

```
<section>
    <question-page id="AnyMemberPage" show-back-button="true" show-exit-button="false"</pre>
 show-save-exit-button="true" show-person-tabs="false">
        <title id="AnyMemberPage.Title">Household</title>
 <description id="AnyMemberPage.Description">Please enter details about the other
 people besides yourself who live in your home including those who are not related to
 you. Once you're finished please check the box to confirm the number of other people
 living in your home (not including yourself).
         </description>
         <condition expression="false">
     <cluster entity="Application">
  <question id="dummy" default-value-expression="householdCount()"/>
     </cluster>
        </condition>
        <quick-add-list entity="Person" criteria="isPrimaryParticipant==false">
            <title id="HouseholdList.Title">Household members</title>
     <quick-edit-link >
        <page-title id="Edit.PageTitle">Edit %1s (%2s) <argument id="Person.firstName"/</pre>
><argument id="Person.age"/>
                </page-title>
     </quick-edit-link>
     <quick-delete-link>
         <page-title id="Delete.PageTitle">Remove %1s %2s (%3s) from the household?
<argument id="Person.firstName"/><argument id="Person.lastName"/><argument</pre>
id="Person.age"/></page-title>
         <confirm-message id="Delete.Message">Are you sure you want to remove %1s?
<argument id="Person.firstName"/></confirm-message>
         <confirm-button id="Delete.Button">Remove %1s<argument id="Person.firstName"/</pre>
></confirm-button>
     </quick-delete-link>
            <quick-add-link>
               <page-title id="Add.PageTitle">Add new person to household</page-title>
               <title id="Add.Title">Add new member</title>
            </guick-add-link>
            <page-content id="HouseholdMember"/>
        </quick-add-list>
        <condition expression="Application.householdCount != 0">
            <cluster>
                <question id="doneEditingHousehold" mandatory="true" control-</pre>
question="true" control-question-type="IEG BOOLEAN">
                <label id="HasOtherMembers.Label">There are %1s other people in your
home not including yourself<argument id="Application.householdCount"/></label>
                </guestion>
            </cluster>
        </condition>
        <condition expression="Application.householdCount == 0">
            <cluster>
                <question id="doneEditingHousehold" mandatory="true" control-
question="true" control-question-type="IEG BOOLEAN">
                <label id="HasOtherMembers.Label">There are no other people in your
household, just yourself</label>
                </question>
            </cluster>
        </condition>
    </guestion-page>
    <loop loop-type="hidden" entity="Person" criteria="isPrimaryParticipant==false">
        <question-page id="HouseholdMember">
            <title id="HouseholdMember.Title">Household</title>
            <cluster>
                <title id="HouseholdMember.Cluster.Title">Personal details</title>
                <question id="firstName" mandatory="true">
                    <label id="FirstName.Label">First Name</label>
                </question>
                <question id="lastName" mandatory="true">
                    <label id="lastName.Label">Last Name</label>
                </auestion>
                <question id="dateOfBirth" mandatory="true">
                    <label id="DateOfBirth.Label">Date of birth</label>
                </question>
            </cluster>
        </question-page>
    </100p>
</section>
```

The quick-add-list component uses a custom function householdCount that updates the number of household members. The logic for that custom function can be written as follows:

```
public Adaptor getAdaptorValue(final RulesParameters rulesParameters)
   throws AppException, InformationalException {
   final IEG2Context ieg2Context = (IEG2Context) rulesParameters;
   final long executionID = ieg2Context.getExecutionID();
   final long rootEntityID = ieg2Context.getRootEntityID();
   final IEGScriptExecution scriptExecution = IEGScriptExecutionFactory
     .getInstance().getScriptExecutionObject(executionID);
   Datastore ds = null;
   try {
     ds = DatastoreFactory.newInstance()
       .openDatastore(scriptExecution.getSchemaName());
   } catch (final NoSuchSchemaException e) {
     throw new AppException(IEG.ID SCHEMA NOT FOUND);
   final Entity rootEntity = ds.readEntity(rootEntityID);
   final Entity[] personEntities =
     rootEntity.getChildEntities(ds.getEntityType("Person"));
   rootEntity.setTypedAttribute("householdCount", personEntities.length - 1);
   rootEntity.update();
   return AdaptorFactory.getBooleanAdaptor(true);
```

# Chapter 21 Configuring how and when server-side validations are displayed

In Citizen Engagement, there are two phases of validation in IEG forms. They are client-side validations and server-side validations. Client-side validations occur first. They are displayed at the top of the page in the error section, with a link to the field with the error, and the message is repeated inline beneath the field. Examples are typically mandatory field validations. For example, Complete the field "Date of Birth". Server-side validations occur when a call is made to the backend to check the information provided by the user. Examples are where a person's date of birth can't be in the future, or where an SSN/SIN needs to be in a certain format and have a specific number of characters.

#### About this task

By default server-side error messages are displayed at the top of the page in the error section once all client-side errors have been corrected. Unlike client-side error messages, there is no link to the field with the error and the error is not repeated inline. You can choose whether client-side and server-side validations should operate the same way and display simultaneously with links to the field with the error.

#### **Procedure**

#### Set the environment variable

REACT\_APP\_ACCESSIBLE\_SERVER\_SIDE\_VALIDATIONS\_ENABLED in your .env file with a value of true to display all error messages at the same time whether they are as a result of client-side or server-side validations. When this is set to true, all error messages including server-side error messages are displayed with a link to the field where the error occurred. The field with the error is highlighted to the user and the error message is repeated inline.

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