fintech OS

FintechOS Studio 21.1.0

Release Notes

TOC

Overview

> **IMPORTANT!**
> FintechOS Studio 21.1.0 requires .NET Framework 4.7.2.
> When upgrading from previous versions:
>
> - Update the *web.config* file to support .NET Framework 4.7.2. For details see "What's New" on the next page.
>
> - Configure any system parameters that have replaced *web.config* settings. For details, see "What's New" on the next page.

FintechOS Studio 21.1.0 delivers powerful new features and improvements that were developed to simplify and improve the work experience of FintechOS developers and consultants and also to respond to our customers and partner's needs.

These release notes give you a brief, high-level description of the newly developed features and the enhancements implemented to existing features. For detailed information regarding features, capabilities, and examples, refer to the Technical Documentation.

If you have questions about your FintechOS license or wish to purchase an upgrade to FintechOS 21.1.0, please contact support@fintechos.com or your local FintechOS partner for more information.

If you have questions regarding features or you have encountered issues, submit tickets in the FintechOS Service Desk portal.

What's New

Search bar in the Menu

FintechOS Portal and FintechOS Studio now accommodate a search bar. It is possible to search for the menu items, not the records inserted. For more details, see Overview.

Clone a Form Driven Flow

In order to save time and effort, it is now possible to duplicate a Form Driven Flow effortlessly. The duplicate will have all the configurations of the original, including all of its characteristics. To only difference is the name. After the cloning process is done, it is possible to change any of the configurations and tail the form to the desired look and functionality. To duplicate a form with all of its data and configurations, click on the pre-existing from, on the General page and click on the button ''Clone form''. For more details, see Creating Form Driven Flows.

Steps triggering Actions on a Form Driven Flow

A complex Form Driven Flow is made up of several steps which lead a client through mandatory information gathering and business processes. For example, add an action step to trigger the generation of a contract once the client has reached that step. To add steps and configure them no-code, several types of steps are available on the platform:

- default

- processor. For more information, see Custom Processor Step.

- action. For more information, see Action step.

The Action step calls a Form Action configured beforehand and it is called by attaching it to a step and deciding the navigation flow afterwords.

Form Action in a step

After having added an action in Flow Control, a user is able to set multiple formActions that automatically will be triggered after save, before navigation, if a specified condition (similar to navigation rule) is true. There are two grids displayed for configurations After Load and After Save. For example, insert a condition to calculate the eligibility of a potential client in the after save grid. For more details, see Adding and Configuring Steps.

UI Designer

There are several new features in the release in the UI Designer capability of FintechOS Studio. The buttons inserted in the UI Designer can call:

- custom

- call custom processor (and endpoints)

- call form action.

For example, add a button to call the eSign processor and have it be triggered when the client clicks on the button that reads ''Sign agreement''. For more details, see STEP 4. Working with Buttons.

Endpoints input and output mappings in UI designer

When adding a pre-defined endpoint to a button in UI Designer, the output has the Server Automation Script with an output structure set as "Boolean". For example, the output structure bool could be for a true value bool of a ''Agree to data processing by third-party partner''.

Flow control rule can trigger Checking with custom processor

It is possible to create a rule that checks the attribute mappings of an endpoint to return the values true or false from the bool attribute. For details, see Flow Control.

Business Formulae Object Collection

In an argument data of a complex type with properties A,B,C of type string and D,E of type numeric. The result will be a collection of items with properties A, B and C, where C will be the SUM for the group determined by the content of properties A and B. For details, see Formula Editor.

Example

```
var result = FROM(data).GROUPBY(["A","B"]).SUM("D");
```

Data Config Deployment

To achieve an import, a package can be xml placed in a zip type archive and import it. It is available from the interface of the FintechOS Studio or through the Package Deployer.

E-sign with tags or coordinates or both

To configure the signing of a document that was either configured with FintechOS' Digital Documents Processor or a document generated externally by a bank of insurance company, it is possible to sign it by placing a tag or with coordinates or both on a PDF file by creating a request. In order to correctly identify where we are adding the signature via coordinates, the SigntureCoordinates object contains: FileName, PageNumber and coordinates X and Y.

Business Workflows transition message

A FintechOS user is able to write a message to be displayed when a transition from a status to another is performed for the user on the FintechOS Portal to read it and be notified of the change. For example, set the message to be displayed in the UI ''Your application has been approved'' to be shown when the application's status has been changed from potential client to approved by an insurance officer. For more details, see Edit Workflow Transition Configuration.

Fixed Issues

No.	Summary	Module
FSD-5966	A user needed permission to read from customAction entity.	FintechOS Studio FintechOS Portal
FSD-5000	This release addresses a security issue in the FintechOS environment.	FintechOS Portal
N/A	Access to the name of the report on the header of each simple grid report was denied.	FintechOS Portal
FSD-6146	In processor step on a Form Driven Flow or Digital Journey, it was not possible in General tab of the processor step to set the ''Fail Navigation Step'' to the same processor step.	FintechOS Studio
FSD-2148	HTML attribute that was read-only could be altered.	FintechOS Studio
FSD-4876	The Business workflow design diagram showed the name of the status, not the label of it.	FintechOS Portal FintechOS Studio
FSD-1767	In a view which had a where condition on it and was used on a form, and the main entity in the fetch did not have the character ''a'' as alias, the system generated an error.	FintechOS Studio

Known Issues

Summary	Module

During the OCR process done with Computer Vision on a device with Andriod 11, the screen freezes after the photo is taken on screens smaller than 6 inches.
 	
As a workaround, if the user scrolls on the screen so that the address bar is no longer visible, then the bug does not reproduce and they can advance to the next step.
 	
In addition, use the following code snippet to eliminate the issue:
 	
``css
html, body {
 	
    height: 100%;
}
 	
#ebsContainer {
 	
    height: 100%;
 	
    overflow-y: auto;
}
 	
.main-container {
 	
    height: 100%;
 	
    overflow-y: auto;
}
``
	FintechOS Studio and FintechOS Portal

Plugin assemblies must be copied and pasted in the `PortalPluginStore\AddIns` folder after import in FintechOS Studio in order to be functional.	FintechOS Studio
The Save Changes prompt does not appear when the Insert button is clicked.	FintechOS Studio and FintechOS Portal
Inline editing in views doesn't work if the view columns are created with attribute aliases from the fetch.	FintechOS Portal