Dynamic Forms

Release 9.01

Release 9 Summary

Expected Production Date – April 1st – 7:00am

- The last release, was a once-a-decade major release, this release on the other hand is a very minor release

- The main aspects of the release include:

  - Tweaks for the User Portal and customized URLs

  - Broadcast workflow modification – see screens for details

  - Email configurations updates

  - Other minor bug fixes or enhancements as listed.

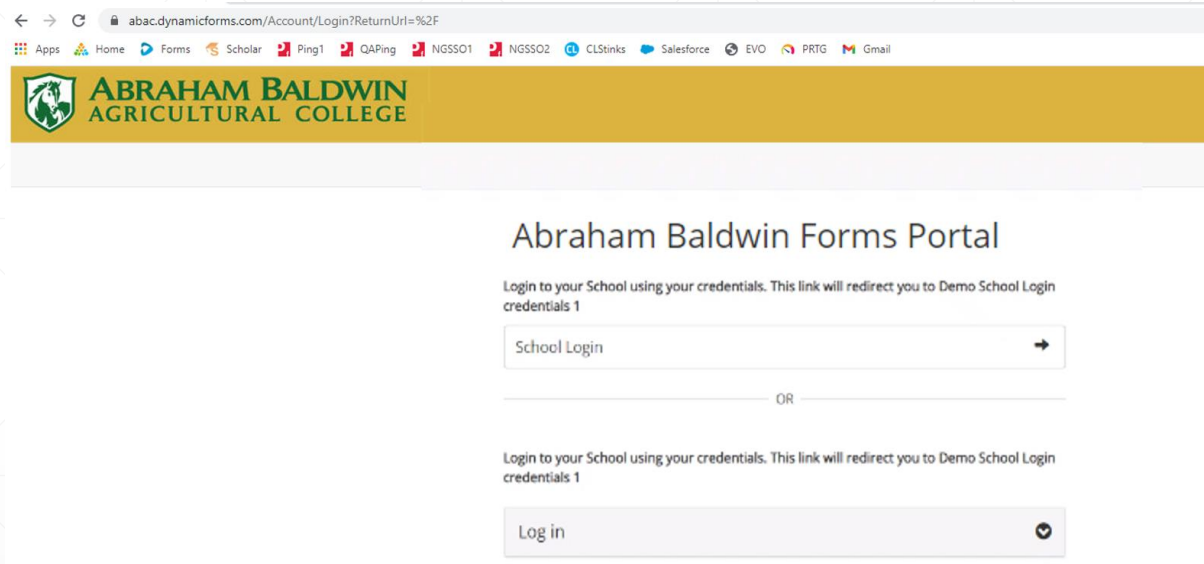# Release 9.01

March 31, 2021 Release Date

Portal Modifications

Portal Login Options

As today, many of your students/users will be given a link to go directly to a form to complete it, they would not need to visit the portal.

However, we wanted to be sure that users could be sent to a portal address and logged into the system in the appropriate fashion. So, the options of manual login and SSO Login have been retooled.

Portal Login Options

In this case, one of our clients has purchased the portal option.

If they wished to direct students to the portal, the would be able to utilize the custom url (again for this example):

https://abac.dynamicforms.com

Portal Login Options

At the portal login page, the user can be presented with one or two possible options:

1. Single Sign On – which links the user to the School's SSO solution(s)
2. Manual Dynamic Forms login – ability to create an account to login to the portal (like a parent or another third party)

Broadcast Workflow

New Treatment

What is a Broadcast Workflow

There are two scenarios that can create a broadcast workflow:

1. **Choose from Workflow Type**

Choose your form workflow type   Conditional Routing

Broadcast to all form participants ←
Route the form sequentially as each section is completed
Let each form participant decide where the form is routed next
Conditional Routing

Hide unused signature lines?

ipants

2. **Build it into a Conditional Workflow
   – in this case, Section C is
   a broadcast to several individuals**

A   Proposal Requestor

B   Provost Initial Receipt

C   Provost
Proposal Analysis Point Person
EEIR Point Person
Implementation Detail Point Person
Manager of Faculty Affairs
Dean
Associate VP of Enrollment Management
AA Budget Analyst
Assoc VP - Facilities
Chief Information Officer
University Budget

D   Academic Affairs Final Review
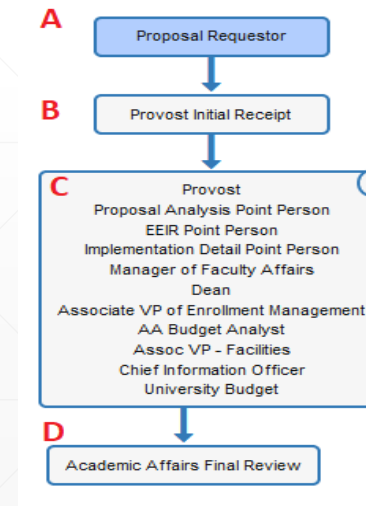
What's wrong with our Broadcast Flow- 1

Today, with Broadcast, there are two things that people do not like:

Broadcast flow was not independent of other broadcasters' actions.
So, in this use case below, B sends to Section C (a broadcast group).

B
Provost Initial Receipt

C
Provost   1
Proposal Analysis Point Person
EEIR Point Person
Implementation Detail Point Person
Manager of Faculty Affairs
Dean
Associate VP of Enrollment Management
AA Budget Analyst
Assoc VP - Facilities
Chief Information Officer
University Budget
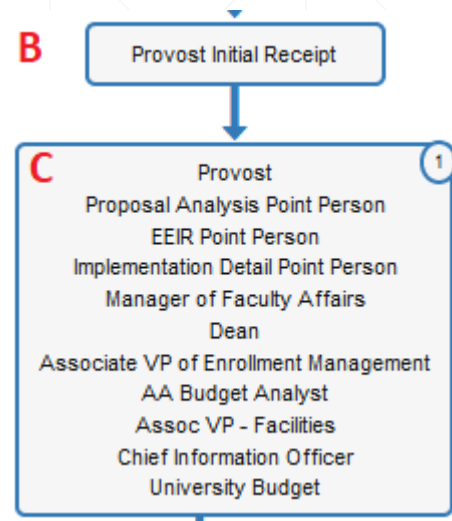
If a participant member of C looks at the form and then saves the form as a draft, we currently prevent the other participants from looking at and processing that form.

This release, we will make Broadcaster's actions independent from each other. This means if Broadcast Participant 1 saves the form as a draft, it will not stop Participant 2 from completing the form.

What's wrong with our Broadcast Flow- 2

The second piece that our users did not like was the lack of ability to return (reject) the form to the Broadcast group.   Again, using the case below, Dynamic Forms would currently not allow Section D to return the form to participants in Section C.
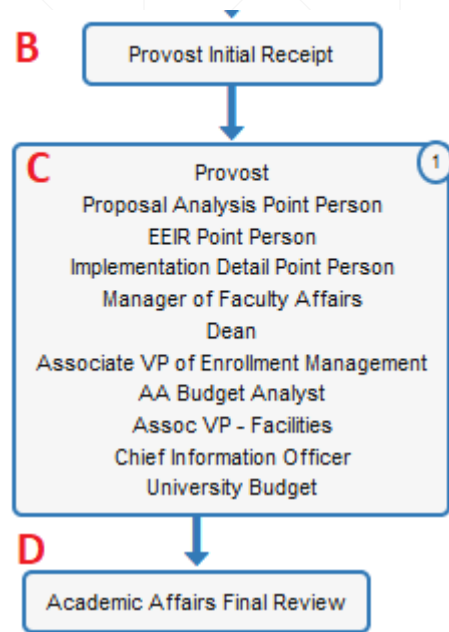
This release, we will have two changes:
1. Participants in Section C can return the form to Section B (could not do this before). If another Section C participant tries to sign the form, they will be alerted to the form's Returned status.
2. Also, Section D participants will now be allowed to return the form to a single Section C person at a time. As the form configuration makes the sign-off process independent of other Section C participants, so can the return process be independent.

Email Configurations
Minor Fixes

Emails

Dynamic Forms now has three emailing options:

1. Through the Dynamic Forms servers (as it has always been)
2. Through SendGrid – a more robust e-mail service – you can consider this if
   if you are sending thousands of invitations frequently
3. Dynamic Form can send email text to your email server for routing.

Email Fix

Dynamic Forms has many different types of email configurations, including reminder emails, confirmation emails, co-signer emails, etc.

The fixes included in this release ensure that all types of emails will be configurable to use the email choice of the school.

For instance, the Admin Notification e-mail was configured solely to go out with the Next Gen Server. So that, when the SendGrid option was chosen, the Admin Notification did not get sent.   This and all email configurations have been updated to use the School's choice of email platform for all emails.

Other Changes
Enhancements/Changes

Other Changes

1. Fix some areas of trouble with apostrophe characters - there are several "apostrophe" characters in use on different browsers and mobile devices – Our server-side code will now (where configured) replace all non-standard apostrophe characters with the standard apostrophe
2. User Audit display bug fix
   a. Should now be showing the proper UpdatedBy person name
   b. The update type should now show the UserAudit update types (was showing FormTemplate update type descriptions)
3. View PDF security by email
   a. Fixed a bug where a user requested to be a participant by email wasn't allowed to see the form PDF because their email didn't match exactly (case was different)
4. User changes
   a. School (SSO) accounts by default will require a unique email address, unless configured at the tenant to allow multiple accounts per email (new setting). Manual accounts will always require a unique email
   b. You can now choose, via the designer, whether a FormTemplate can be seen on a user's pending queue when they are a requested participant by email match (This is in addition to the other ways we allow).
5. Queues Preference Bug - Queues shows zero results. This is happening because a page item was deleted from the designer and put back again.
6. Added Option to send Invitation Link with an SSO Link as well as a Non-SSO link
7. Admin Dashboard - folder bug fix - Fixed an issue where form templates would appear multiple times on the admin dashboard