



Dynamic Forms

Release 10.3 – Release Notes

Release 10.3 Summary

- New User Portal
- Archive is back

Release 10.3

October 28th Release Date

Today's "Pending/Draft Forms"

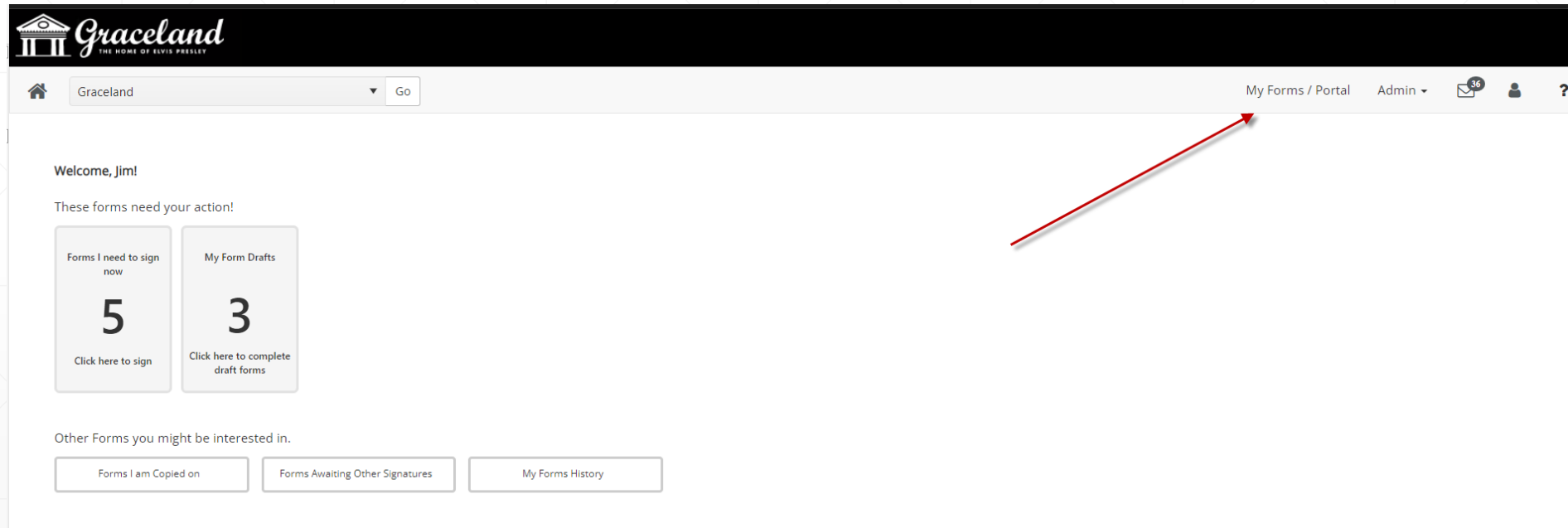
The existing User Page shows forms in all statuses (draft, pending, incomplete, rejected, etc.) and it becomes difficult to know which form needs your attention and action.

The screenshot shows the Graceland user interface. At the top left is the Graceland logo with the tagline 'THE HOME OF ELVIS PRESLEY'. Below the logo is a search bar with 'All Fields & Participants' and a search icon. The main content area is titled 'Pending / Draft Forms'. A table lists several forms with columns for Form Name, Status, Description, Date, PDF, HTML, and Action. A dropdown menu is open, showing options: Graceland, Pending / Draft Forms, Forms I'm Copied On, and Form History. A red arrow points to the 'Pending / Draft Forms' option in the dropdown menu.

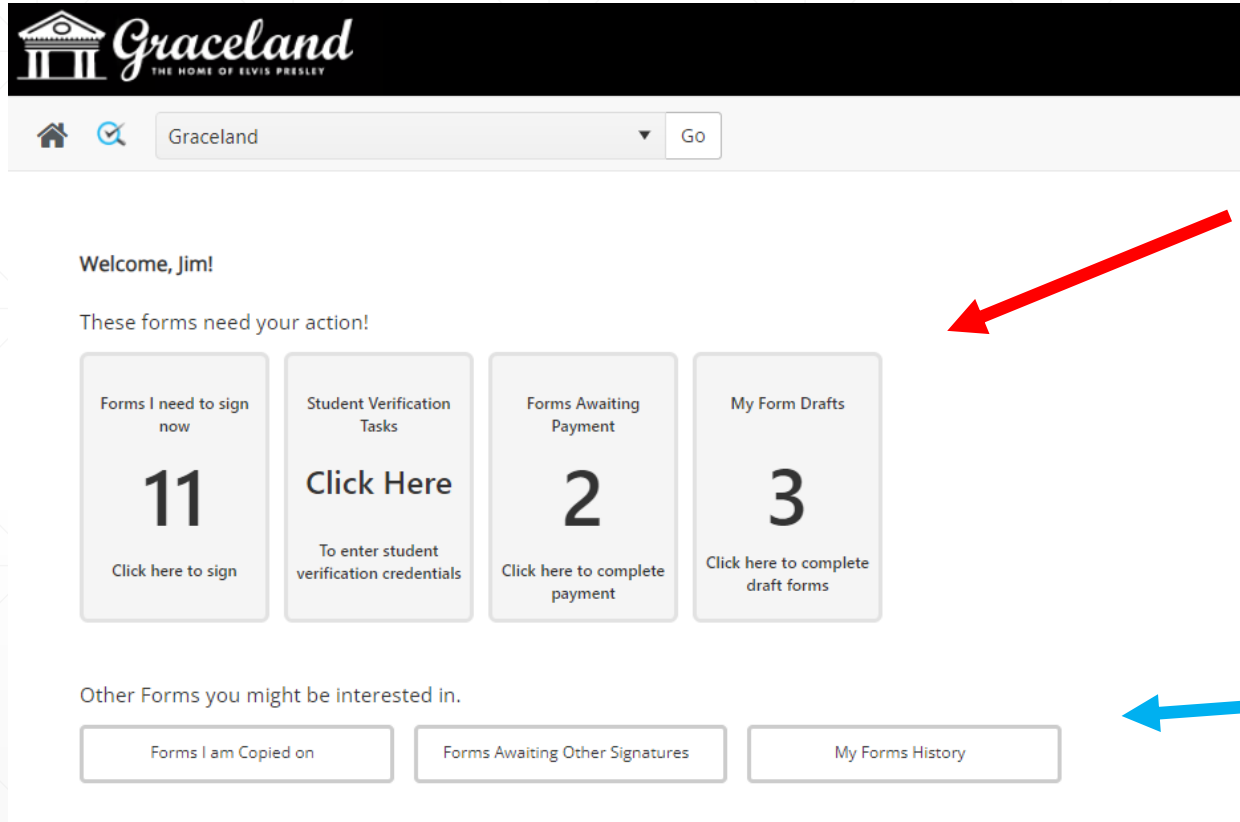
Form Name	Status	Description	Date	PDF	HTML	Action
Epic Employee Access Request - Next Gen Working 2	Incomplete	Started By: Donald Curtis	Signature Request Date: 9/10/2024 11:37:29 AM			Action ▾
Residency Reclassification Application	Pending	Started By: Jim Grace	Signature Request Date: 9/9/2024 11:32:06 AM			Action ▾
Residency Reclassification Application	Pending	Started By: Jim Grace	Signature Request Date: 9/9/2024 11:27:29 AM			Action ▾
Late Add	Incomplete	Started By: Lynne Garcia	Signature Request Date: 8/2/2024 7:46:42 PM			Action ▾
Late Add	Incomplete	Started By: Lynne Garcia	Signature Request Date: 5/16/2024 2:21:15 PM			Action ▾

NEW: “My Forms/Portal”

Users will now be placed into a new portal page which quickly provides them with the information needed to act quickly on forms that need their attention and/or get them to any other forms they need to see.



New Portal for Users



Shows Forms waiting for your action now! These are called Incomplete forms today. Soon, it will also show forms that need to be Approved (more on that in the next release). If you are a **Dynamic Verification** client, your users can quickly get to that work also.

Form statuses that are not ready for immediate action can be found here. Current statuses of these forms are Draft, CCed, Multiple Signature, and Completed.

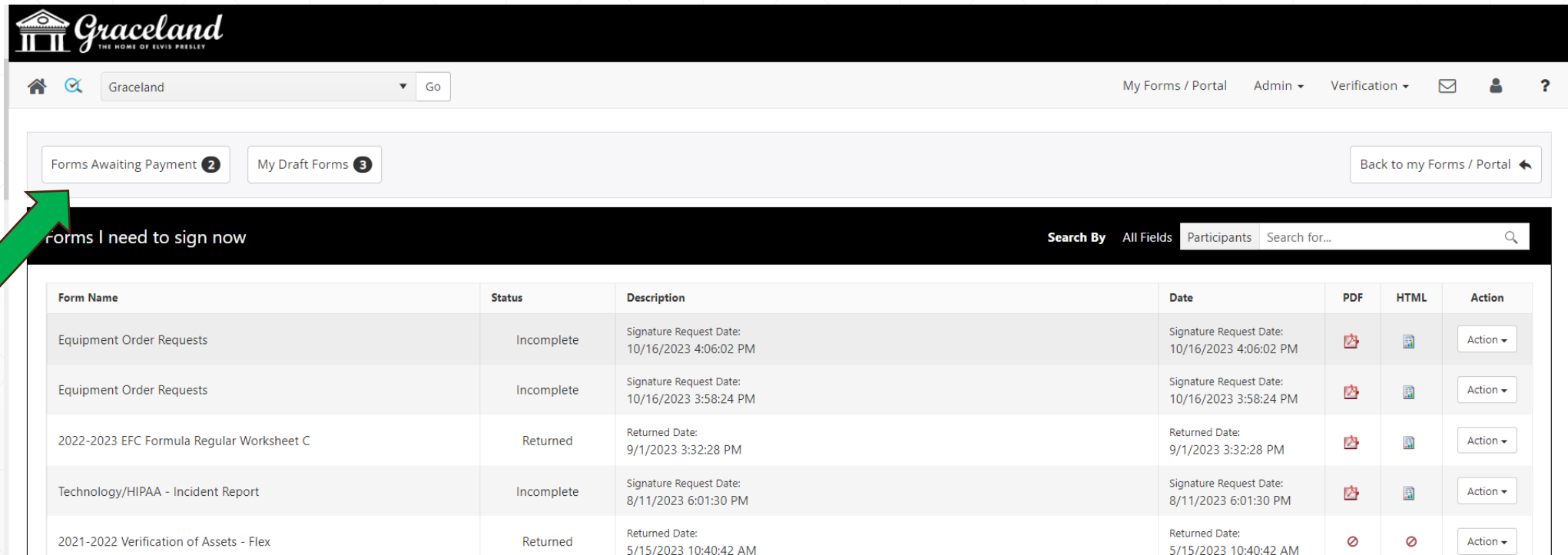
Existing Portal Users

For our premium portal users, the screens will also get a facelift. The same look and feel will be shown next to the other campus forms.

The screenshot displays the Graceland portal user interface. At the top left is the Graceland logo with the tagline "THE HOME OF ELVIS PRESLEY". Below the logo is a search bar containing "Graceland" and a "Go" button. On the right side of the header, there are navigation links for "My Forms / Portal", "Admin", a notification bell with "36", a user profile icon, and a help icon. The main content area is divided into two sections. The left section, titled "Welcome, jim!", contains a heading "These forms need your action!" and two large cards. The first card, "Forms I need to sign now", shows the number "5" and a "Click here to sign" link. The second card, "My Form Drafts", shows the number "3" and a "Click here to complete draft forms" link. Below these cards are three buttons: "Forms I am Copied on", "Forms Awaiting Other Signatures", and "My Forms History". The right section is a sidebar titled "Other Forms 4" with a search bar "Search other forms...". It lists two categories: "Graceland - Registrar" and "Graceland - Bursar". Under "Graceland - Registrar", there are three items: "Add/Drop Form", "Change / Declare Major Form", and "Change of Address Form", each with a "Fill out form" button. The "Graceland - Bursar" section is currently collapsed.

Get to all your forms easily

Once a user clicks into a form status (e.g. Forms I Need to Sign Now), they will see all those forms listed and ready for their action. Also, form status badges will be shown across the top of the screen to allow users to find other form statuses they need to take action on (in this example forms awaiting payment and Draft Forms).



The screenshot displays the Graceland Forms Portal interface. At the top, the Graceland logo is visible. Below the logo, there is a navigation bar with a search bar containing 'Graceland' and a 'Go' button. To the right of the search bar, there are links for 'My Forms / Portal', 'Admin', 'Verification', and a user profile icon. Below the navigation bar, there are two status badges: 'Forms Awaiting Payment 2' and 'My Draft Forms 3'. A green arrow points to the 'Forms I need to sign now' section. Below this section, there is a search bar with 'Search By' and 'All Fields' options, and a search input field containing 'Participants'. The main content area is a table with the following data:

Form Name	Status	Description	Date	PDF	HTML	Action
Equipment Order Requests	Incomplete	Signature Request Date: 10/16/2023 4:06:02 PM	Signature Request Date: 10/16/2023 4:06:02 PM			Action ▾
Equipment Order Requests	Incomplete	Signature Request Date: 10/16/2023 3:58:24 PM	Signature Request Date: 10/16/2023 3:58:24 PM			Action ▾
2022-2023 EFC Formula Regular Worksheet C	Returned	Returned Date: 9/1/2023 3:32:28 PM	Returned Date: 9/1/2023 3:32:28 PM			Action ▾
Technology/HIPAA - Incident Report	Incomplete	Signature Request Date: 8/11/2023 6:01:30 PM	Signature Request Date: 8/11/2023 6:01:30 PM			Action ▾
2021-2022 Verification of Assets - Flex	Returned	Returned Date: 5/15/2023 10:40:42 AM	Returned Date: 5/15/2023 10:40:42 AM			Action ▾

Archive Forms

Pre-conversion to the Azure platform, Dynamic Forms always held 2 years of form instances (individual forms submissions) on the Admin Home screen (see below).



The screenshot shows the Graceland Admin Home screen. The header includes the Graceland logo and navigation links. The main content area displays a table of Form Templates. A red arrow points to the 'Pending' column for the 'Document Upload Cover Page - No Login' form, which has a value of 2.

<input type="checkbox"/>	Active	Invites	Form Name	Multi	Pending ↓	Returned	Processed	Action
<input type="checkbox"/>	Yes	0	Document Upload Cover Page - No Login Graceland - Registrar	0	2	0	0	Action ▾
<input type="checkbox"/>	Yes	0	Jim's New Shirt Request Graceland	0	2	0	0	Action ▾
<input type="checkbox"/>	Yes	0	Sammy Graceland	0	2	0	0	Action ▾
<input type="checkbox"/>	Yes	0	Checkout Tests Graceland - Bursar	0	1	0	0	Action ▾

Archive Form Instances older than 2 years

Search Form Items

Search...

Organizations

Select all orgs

Filter organizations...

- Graceland
- Graceland - Admissions
- Graceland - Bursar
- Graceland - Conferences and Camps
- Graceland - Registrar

Total orgs 5

Search By Form Item Search By Participant

Form Item:

All Form Items

Warehouse

Folder Filter Do not filter

Active Filter Do not filter

Favorite Filter Do not filter

Cancel Search

Form instances older than 2 years (Years 3 through 7) are still in the system and can be found by searching the warehouse. To the left, we have checked the Warehouse checkbox to tell Dynamic Forms to search the warehouse for your search selection. With this checked, Dynamic Forms will check all years and find the appropriate matches.

Coming Soon! – 2024 December Testing

- New **Free** Branded User Portal
- No Sign Workflow
- Approval Workflow
- Proxy Functionality
- Auto-Escalation Functionality
- Enhanced Invitations
- Conditional Emails
- Active E-sign feature
- Suppress CC feature and more!