

# Dynamic Forms

---

Release 10

# Release 10 Summary

- Updated Home Page – Ability to see all orgs on Homepage
- Security by Org – now can assign permissions by organization
- Texting
- Other New Features
  - Third Party ADA Audit changes - Best Practices Guide (found in Online Help)
  - Preferred Name – See preferred name, instead of first name, in areas that are applicable
  - View Attachments – See attachments in the product rather than needing to download
  - Choice List Fixes – fixes to API refreshes for individual users

# Release 10

---


# Admin Home Page



---






New Enhancements


# Old Look




User could only see / interact with one organization







 Dynamic Forms University 



My Forms  Admin    









 All Form Items

 Warehouse  

 Form Templates 23

Folder Filter   Active Filter    

<input type="checkbox"/>	Active	Form Template Name	Returned	Multi	Pending	Processed	Archived	Action
<input type="checkbox"/>	Yes	*Dynamic Forms University Course Request Form 	0	0	0	21	0	Action 
<input type="checkbox"/>	Yes	*Dynamic Forms University Course Request Form UPDATE COPY 	0	0	1	125	0	Action 
<input type="checkbox"/>	Yes	Activating Forms Course Assessment 	0	0	13	0	0	Action 
<input type="checkbox"/>	Yes	Building a Complex Form Course Assessment 	0	0	13	0	0	Action 

# New Homepage

Many new changes to the homepage – most importantly, if users have access to more than one organization, they can see forms from all orgs on the new Homepage.



My Forms ▾

Admin ▾

12

## Form Templates 16


Selected 3 orgs

Add New FormFilters Actions ▾

<input type="checkbox"/>	Active	Invites	Form Name		Draft	Returned	Multi	Pending	Opted Out	Processed	Archived	Action
<input type="checkbox"/>	No	0	2021-2022 Verification of Assets - Flex DFU - Financial Aid	★	0	0	0	0	0	0	0	Action ▾
<input type="checkbox"/>	No	0	AA - Undergraduate Enrollment Application DFU - Admissions	SANDBOX ☆	0	0	0	0	0	0	0	Action ▾
<input type="checkbox"/>	Yes	2	Add/Drop Form Dynamic Fins University	☆	0	0	0	1	0	0	0	Action ▾

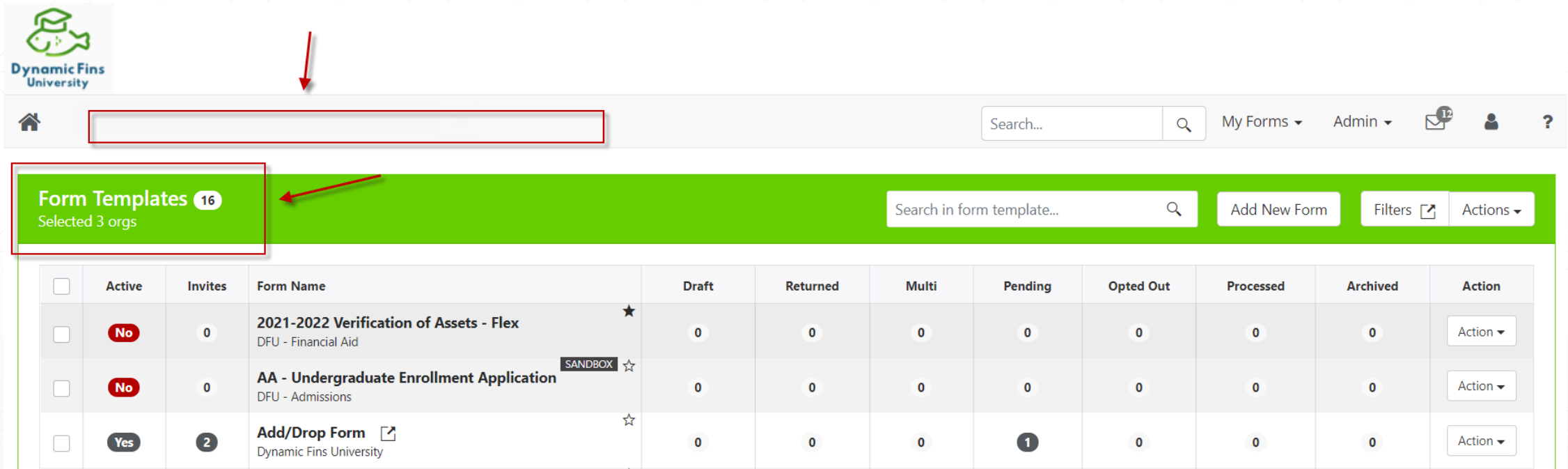
# New Homepage

A new format of the Homepage shows the name of the form in **Bold**, while the name of the organization is below the form name.

Form Templates 16						
Selected 3 orgs						
<input type="checkbox"/>	Active	Invites	Form Name		Draft	Returned
<input type="checkbox"/>	No	0	<b>2021-2022 Verification of Assets - Flex</b> DFU - Financial Aid	★	0	0
<input type="checkbox"/>	No	0	<b>AA - Undergraduate Enrollment Application</b> DFU - Admissions	SANDBOX ☆	0	0
<input type="checkbox"/>	Yes	2	<b>Add/Drop Form</b>  Dynamic Fins University	☆	0	0

# New Homepage

If users have access to only one org, that org will be selected for them upon login. Gone is the Organization dropdown in the Menu bar. Selected orgs are shown under the Form Templates menu heading.



The screenshot displays the Dynamic Fins University homepage. At the top left is the logo. A red arrow points to a search bar in the top navigation bar. Below this, a green banner for 'Form Templates' (16) is shown, with a red arrow pointing to it. The banner includes a search bar, 'Add New Form', 'Filters', and 'Actions' buttons. Below the banner is a table with columns for Active, Invites, Form Name, Draft, Returned, Multi, Pending, Opted Out, Processed, Archived, and Action. The table lists three forms: '2021-2022 Verification of Assets - Flex', 'AA - Undergraduate Enrollment Application', and 'Add/Drop Form'.

<input type="checkbox"/>	Active	Invites	Form Name	Draft	Returned	Multi	Pending	Opted Out	Processed	Archived	Action
<input type="checkbox"/>	No	0	2021-2022 Verification of Assets - Flex DFU - Financial Aid	0	0	0	0	0	0	0	Action ▾
<input type="checkbox"/>	No	0	AA - Undergraduate Enrollment Application DFU - Admissions	0	0	0	0	0	0	0	Action ▾
<input type="checkbox"/>	Yes	2	Add/Drop Form Dynamic Fins University	0	0	0	1	0	0	0	Action ▾



# Changing your Homepage

Clicking the Selected Orgs title on the Homepage will pop up the Homepage filters screen.

If you want to remove or add Orgs you are viewing on the Homepage, just highlight or un-highlight the Org name on the left hand side of the screen.

In this screenshot, all of the Orgs are highlighted so all will be presented on the Homepage.

Filters ×

Organizations

☒ Select all orgs

Filter organizations...

DFU - Admissions

DFU - Financial Aid

Dynamic Fins - Main Org

Total orgs 3

Statuses

All Statuses ☐

↕

Draft☒

↕

Returned☒

↕

Multi-Pending☒

↕

Pending☒

↕

Processed☒

↕

Archived☒

↕

Payment Pending☐

↕

Opted Out Of E-Signature☐

↕

Deleted☐

Folder Filter Do not filter ▼

Active Filter Do not filter ▼

Favorite Filter Do not filter ▼

Sorting Form name ▼

Paging 50 ▲▼

Cancel

Reset

Save As Preference

Apply

# Changing your Homepage

Filters

Organizations

☐ Select all orgs

Filter organizations...

DFU - Admissions

**DFU - Financial Aid**

Dynamic Fins - Main Org

Total orgs 3

Statuses

All Statuses

☒ Draft

☒ Returned

☒ Multi-Pending

☒ Pending

☒ Processed

☒ Archived

☐ Payment Pending

☐ Opted Out Of E-Signature

☐ Deleted

Folder Filter Do not filter

Active Filter Do not filter

Favorite Filter Do not filter

Sorting Form name

Paging 50

Cancel Reset Save As Preference Apply

In this case, the User has highlighted only one Org – DFU Financial Aid.

With this setting, the User's Homepage will only show the DFU Financial Aid org which only has one form in it.

Go Search...

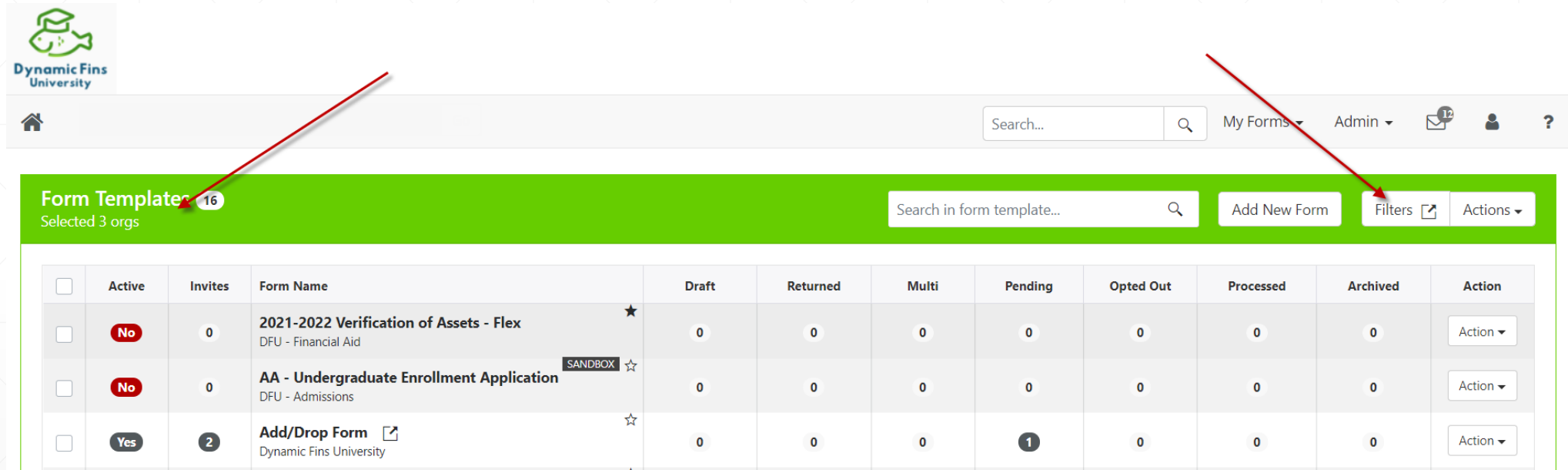
Search in form template...

			Name	Draft	Returned	Multi	Pending	Opte
<input type="checkbox"/>	No	0	2021-2022 Verification of Assets - Flex DFU - Financial Aid	0	0	0	0	

1 50 items per page

# The Other Homepage Filters

Homepage Filters can be found either by clicking the Selected Orgs or by clicking the Filters button on the Form Template menu.



The screenshot shows the Dynamic Fins University homepage. At the top left is the logo. A navigation bar contains a home icon, a search bar, and links for 'My Forms', 'Admin', a notification bell with '12', a user profile, and a help icon. Below this is a green 'Form Templates' header with a badge for '16' and the text 'Selected 3 orgs'. To the right of the header is a search bar 'Search in form template...', an 'Add New Form' button, a 'Filters' button with a link icon, and an 'Actions' dropdown. A table below lists three form templates. Red arrows point from the text above to the 'Selected Orgs' badge and the 'Filters' button.

<input type="checkbox"/>	Active	Invites	Form Name	Draft	Returned	Multi	Pending	Opted Out	Processed	Archived	Action
<input type="checkbox"/>	No	0	2021-2022 Verification of Assets - Flex DFU - Financial Aid	0	0	0	0	0	0	0	Action ▾
<input type="checkbox"/>	No	0	AA - Undergraduate Enrollment Application DFU - Admissions	0	0	0	0	0	0	0	Action ▾
<input type="checkbox"/>	Yes	2	Add/Drop Form Dynamic Fins University	0	0	0	1	0	0	0	Action ▾

# Other Homepage Filters

The screenshot shows a 'Filters' modal window with two main sections: 'Organizations' and 'Statuses'. The 'Organizations' section on the left includes a 'Select all orgs' checkbox, a search bar labeled 'Filter organizations...', and a list of three organizations: 'DFU - Admissions', 'DFU - Financial Aid', and 'Dynamic Fins - Main Org' (which is highlighted). Below the list, it says 'Total orgs 3'. The 'Statuses' section on the right has a list of status options with checkboxes: 'All Statuses', 'Draft', 'Returned', 'Multi-Pending', 'Pending', 'Processed', 'Archived', 'Payment Pending', 'Opted Out Of E-Signature', and 'Deleted'. Below this list are three filter dropdowns: 'Folder Filter' (set to 'Do not filter'), 'Active Filter' (set to 'Do not filter'), and 'Favorite Filter' (set to 'Do not filter'). At the bottom of the 'Statuses' section are 'Sorting' (set to 'Form name') and 'Paging' (set to '50'). At the very bottom of the modal are four buttons: 'Cancel', 'Reset', 'Save As Preference', and 'Apply'.

All filters and preferences can be found on one screen now.


As in the current version of Dynamic Forms, Admin Users can still filter on Statuses, Folders and Active/Inactive Forms.

Some new options for filtering include by Organization, by Sandbox Forms and by Favorite forms.

You can click the **Apply** button to use this configuration just for this session OR click the **Save As Preference** to see this configuration each time you log into Dynamic Forms.

# Favorites

You will notice a new star next to the Form Template Name – if you check the star, it will remain highlighted and that form now is considered one of your favorites. Click the star again and it no longer is a favorite. Favorites are great for Homepage filtering.

Form Templates 16			
Selected 3 orgs			
<input type="checkbox"/>	Active	Invites	Form Name
<input type="checkbox"/>	No	0	2021-2022 Verification of Assets - Flex DFU - Financial Aid
<input type="checkbox"/>	No	0	AA - Undergraduate Enrollment Application DFU - Admissions
<input type="checkbox"/>	Yes	2	Add/Drop Form  Dynamic Fins University



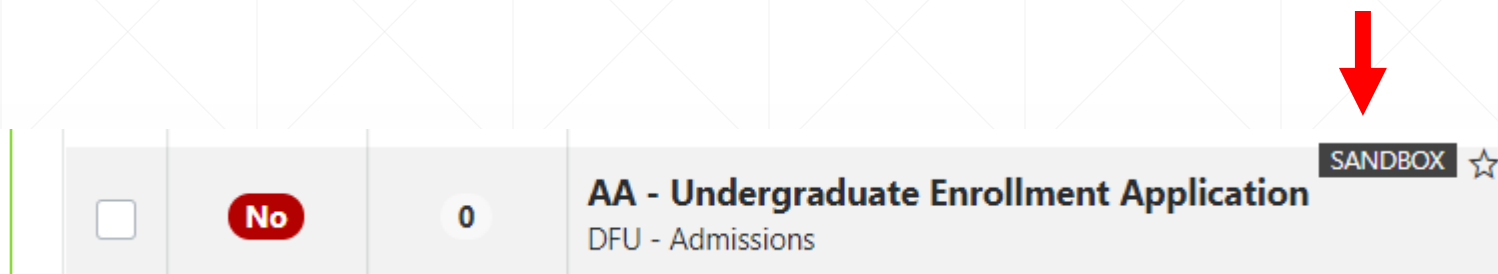
SANDBOX



# Sandbox

Form Template names can also have a “Sandbox” tag next to them. This designates this form template as one belonging to a Sandbox org. Org Admin Users can now designate an organization as a “Sandbox” org. Once that is done, Dynamic Forms will provide this “Sandbox” tag to the Form Template on your Homepage.

Any “Sandbox” or “Development” org has been designated as such for you, if we have not configured correctly, or you wish to change, you can do this yourself or we can help.



# Permissions by Organization

---

New Enhancements

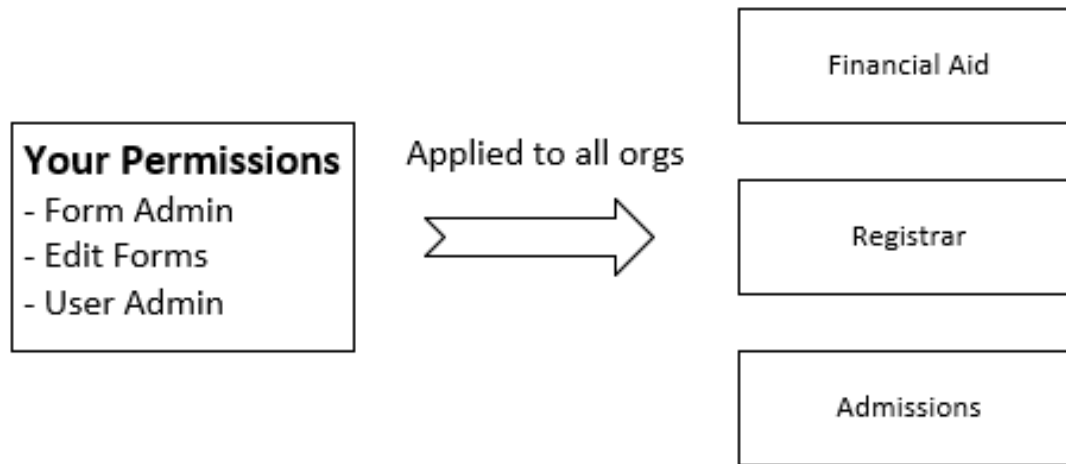
# Permissions by Organization

This is functionality that has been missing in the product for some time, so not only did we add this but also expanded the levels of permissions with each category of permissions.



# Permissions by Organization

Before: Users were provided permissions and those permissions applied to all organizations that they had access to.



# Permissions by Organization

Post Release: Different permissions can be applied per organization.

## **Your Permissions for Financial Aid**

- Form Admin

## **Your Permissions for Registrar**

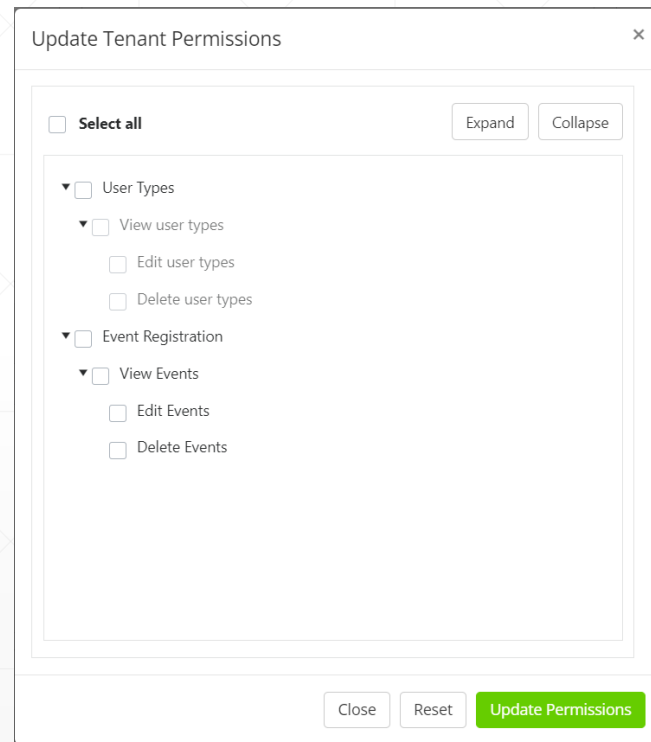
- Form Admin
- Edit Forms

## **Your Permissions for Admissions**

- Forms Admin
- Edit Forms
- User Admin

# New – Tenant Level Permissions

Post Release: Users have control over UserTypes, Portals and soon Event Registrations



The screenshot shows a modal dialog titled "Update Tenant Permissions" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Select all" with an unchecked checkbox and two buttons, "Expand" and "Collapse". Below this, there are two main categories, each with a dropdown arrow and an unchecked checkbox: "User Types" and "Event Registration". Under "User Types", there is a sub-category "View user types" with a dropdown arrow and two unchecked checkboxes: "Edit user types" and "Delete user types". Under "Event Registration", there is a sub-category "View Events" with a dropdown arrow and two unchecked checkboxes: "Edit Events" and "Delete Events". At the bottom of the dialog, there are three buttons: "Close", "Reset", and "Update Permissions" (which is highlighted in green).

# User Admin Screens

Old Screen - Slight adjustment for User Admins – we have moved the Orgs and Roles (Permissions) tiles together at the bottom and moved User Types up.

Manage User

[Back to Organization Users](#) ↩

Details

**User Name**  
samveller@bellsouth.net

**First Name**  
SamTest

**Last Name**  
VellerTest

**Email Name**  
samveller@bellsouth.net

Organizations

Edit

**Name**

ABAC - Copied Forms

ABAC - Admissions


ABAC - Admissions Archived Forms

ABAC - Business Office

ABAC - Financial Aid

ABAC - Form Samples East GA

ABAC - Housing




Groups

Edit

**Name**

Admissions Users

Senior Director Group



Roles

Edit


**Friendly Name**

Activate Forms

Edit Forms


Form Admin

Form User



User Types

**Name**



Confidential and Proprietary of Next Gen Web Solutions - Do not share without permission

20

# User Admin Screens

New Screen – Orgs and Permission are combined (details on next screens) and something new called Tenant Permissions has been added.

Dynamic Fins University 

Go

Search...

My Forms

Admin

12

Manage User

Copy User Settings

Back to Organization Users

Details

User Name

samveller@bellsouth.net

First Name

SamTest

Last Name

VellerTest

Email Name

samveller@bellsouth.net

Groups

Edit

Name

Admissions Users

User Types

Name

Tenant Permissions

Edit

Tenant Permission	Permissions
User Types	0
Portals	0
Event Registration	0

Org Permissions

Edit

Organization	Permissions
Dynamic Fins University	23

# Tenant Permissions

New Screen – Orgs and Permission are combined (details on next screens) and something new called Tenant Permissions has been added.

Tenant Permissions		Edit
Tenant Permission	Permissions	
User Types	0	
Portals	0	
Event Registration	0	

Update Tenant Permissions

☐ Select all

ExpandCollapse

☐ User Types

☐ View user types

☐ Edit user types

☐ Delete user types

☐ Event Registration

☐ View Events

☐ Edit Events

☐ Delete Events

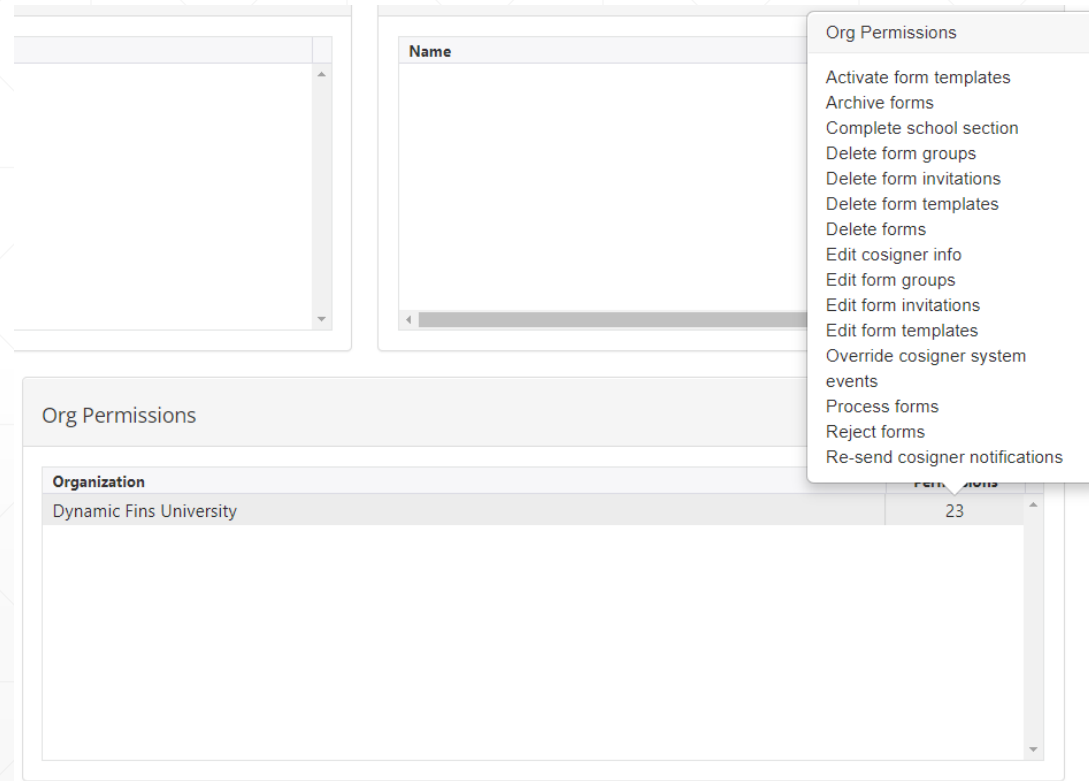
Close

Reset

Update Permissions

# Org Permissions

New Screen – Orgs and Permission are combined (details on next screens) and something new called Tenant Permissions has been added.



# Org Permissions

New Screen – Orgs and Permission are combined (details on next screens) and something new called Tenant Permissions has been added.

The screenshot shows a modal window titled "Update Org Permissions" with a close button (X) in the top right corner. The window is divided into two main sections: "Organizations" on the left and "Permissions" on the right.

**Organizations Section:**

- At the top left is a checkbox labeled "Select all".
- To its right is a search input field labeled "Filter organizations..." with a magnifying glass icon.
- Below these is a list of three organizations: "DFU - Admissions", "DFU - Financial Aid", and "Dynamic Fins University".
- At the bottom left of the list area, it says "Total orgs 3".

**Permissions Section:**

- At the top left is a checkbox labeled "Select all".
- To its right are two buttons: "Expand" and "Collapse".
- Below these is a list of permissions, each preceded by a right-pointing triangle and a checkbox:
  - Orgs
  - Users
  - Form Review
  - Form Design
  - Form Invitations
  - User Groups
  - API
  - DFE

**Footer:**

At the bottom right of the modal, there are three buttons: "Close", "Reset", and "Update Permissions".



# Org Permissions

User Admins can now select the appropriate organization on the left side of the screen and then apply the appropriate permissions to that organization.

Permissions have been categorized and several new permissions have been added.

*Note: In the cases where Edit and/or Delete are permissions, the user must have “View” permissions to Edit and/or Delete also. If “View” is not selected, then Edit and Delete will not work.*

Update Org Permissions

Organizations

☐ Select all

Filter organizations...

Dynamic Fins - Main Org 44

DFU - Admissions

DFU - Financial Aid

Total orgs 3

Permissions

☐ Select all

Expand

Collapse

☐ Orgs

☐ View Org information

☐ Edit Org information

☐ Delete Org

☐ Users

☐ Manage users by org

☐ Form Review

☐ View form data

☐ Complete school section

☐ Manage Cosigners

☐ View cosigner info

☐ Re-send cosigner notifications

☐ Edit cosigner info

☐ Override cosigner system events

Close

Reset

Update Permissions

# Org Permissions

Not only can you individually assign permissions at the org level, but this screen allows you to select multiple orgs and select the same permissions for those two organizations, but different for the non-selected organizations

Update Org Permissions

Organizations

☐ Select all

Filter organizations...

Dynamic Fins - Main Org 44

DFU - Admissions

DFU - Financial Aid

Total orgs 3

Permissions

☐ Select all

Expand

Collapse

☐ Orgs

☐ View Org information

☐ Edit Org information

☐ Delete Org

☐ Users

☐ Manage users by org

☐ Form Review

☐ View form data

☐ Complete school section

☐ Manage Cosigners

☐ View cosigner info

☐ Re-send cosigner notifications

☐ Edit cosigner info

☐ Override cosigner system events

Close

Reset

Update Permissions

# Org Permissions

Here is the full set of permissions in the system now. SCIM has also been updated.

- ▼ ☐ **Orgs**
  - ☐ View Org information
  - ☐ Edit Org information
  - ☐ Delete Org
- ▼ ☐ **Users**
  - ☐ Manage users by org
- ▼ ☐ **Form Review**
  - ☐ View form data
  - ☐ Complete school section
- ▼ ☐ **Manage Cosigners**
  - ☐ View cosigner info
  - ☐ Re-send cosigner notifications
  - ☐ Edit cosigner info
  - ☐ Override cosigner system events
- ▼ ☐ **Change Form Status**
  - ☐ Process forms
  - ☐ Un-process forms
  - ☐ Delete forms
  - ☐ Reject forms
  - ☐ Archive forms
  - ☐ Un-delete forms
  - ☐ Clear DFE flags
- ▼ ☐ **File attachments**
  - ☐ View file attachments
  - ☐ Download file attachments
- ▼ ☐ **Form Design**
  - ▼ ☐ **Design Forms**
    - ▼ ☐ **Basic Form Design**
      - ☐ Edit form templates
      - ☐ Edit live form templates
      - ☐ Delete form templates
    - ▼ ☐ **Custom Emails**
      - ☐ View custom email templates
      - ☐ Edit custom email templates
  - ▼ ☐ **API Design**
    - ☐ View API connections
    - ☐ Edit API connections
  - ▼ ☐ **Payments**
    - ☐ View payment configurations
    - ☐ Edit payment configurations
  - ▼ ☐ **Events**
    - ☐ View form event configurations
    - ☐ Edit form event configurations
- ▼ ☐ **User Groups**
  - ☐ View user groups
  - ☐ Edit user groups
  - ☐ Delete user groups
  - ☐ Assign users to groups
- ▼ ☐ **API Admin**
  - ☐ Manage API connections
- ▼ ☐ **DFE**
  - ☐ DFE access

# Texting

---

New Enhancements

# Texting

Release 10 will introduce the opportunity to provide a communications option to your users.

Today, Dynamic Forms communicates only via Email. If you elect to use texting, texting can now be opted to use at the Tenant Level, the Org Level, the Form Level and at the Participant Level.


Dynamic Forms will utilize vendor Twilio for sending messages. We use them currently in the multi-factor authentication process.

Texting messages will be able to be purchased in bundles (e.g 5,000 texts) and be able to be managed and added to from with Dynamic Forms.

We will provide as close as possible pass-through pricing for this service.

# Texting Step 1 – Purchase and Turn On

Next Gen will work with you to turn on Texting and make sure you have enough text messages to meet your goals.



[Home](#)
[Dynamic Fins University](#)
[Go](#)

[My Forms](#)
[Admin](#)

## Dynamic Fins University

[Name / URL](#)
[Hierarchy](#)
[Branding](#)
[Settings](#)
[User Attributes](#)
[Unique IDs](#)
[Email](#)
[Texting](#)
[Account Settings](#)
[SSO](#)
[API](#)

Is Texting Enabled?

Sender Short Name

DynamicFins

Texting Notification Preference

Form Invitation

Portal Assignment

Confirm Form Submission

Payment Confirmation

Owner Notification

Cosigner Notification

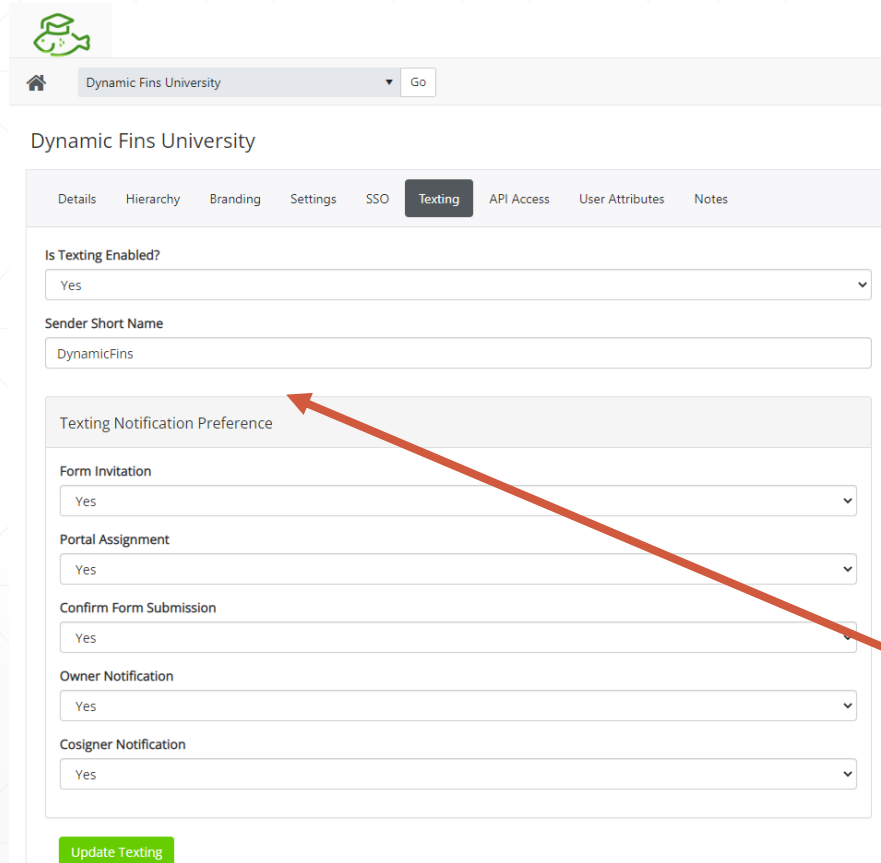
SMS block purchases

This is a list of SMS text messages that have been purchased by the school

Create Date	Block Size	Amount Paid	Actions
Tue Jan 11 2022 17:16:32 GMT-0500 (Eastern Standard Time)	5000	0	<a href="#">Edit</a> <a href="#">Delete</a>

[Update Texting](#)

# Texting Step 2 – Set up Orgs to use Texting



Dynamic Fins University

Details Hierarchy Branding Settings SSO **Texting** API Access User Attributes Notes

Is Texting Enabled?  
Yes

Sender Short Name  
DynamicFins

Texting Notification Preference

Form Invitation  
Yes

Portal Assignment  
Yes

Confirm Form Submission  
Yes

Owner Notification  
Yes

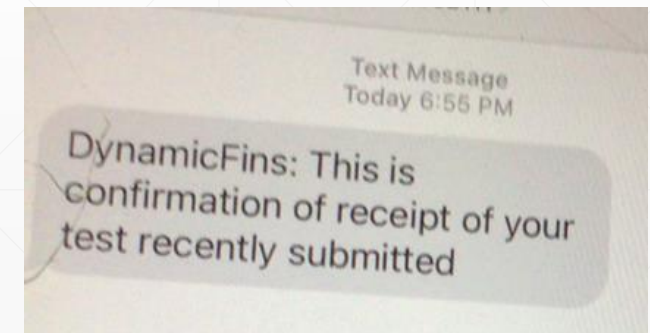
Cosigner Notification  
Yes

Update Texting

Clients may want some orgs/departments to use texting and some orgs not to. For each org that is ready to use texting, it will need to be set up at the organization level by an OrgAdmin.

If you want all Orgs to use texting, the Dynamic Forms team can help with that.

Clients can customize the first Name seen on the text – see below for an example.



# Texting Step 3 – Set up Forms and Participants (cont.)

Form: test Copy  
Org: Dynamic Fins University

Name / Type
Admin Notification
Payments
Custom Text
SSO
Events
Advanced

Pages +

Page 1

[Preview in Browser](#)

[Preview as PDF](#)

Last updated:  
Jim Grace Jan 12, 2022, 3:56:01 PM

Name  
test Copy

Display Name  
test

Description  
Form Description

Document ID  
Document ID

User Types  
▼

Show When Past Due? ☐ No

Esign Requirements  
Single Signature ▼

Is Texting Enabled? ☒ Yes

Texting Notification Preference

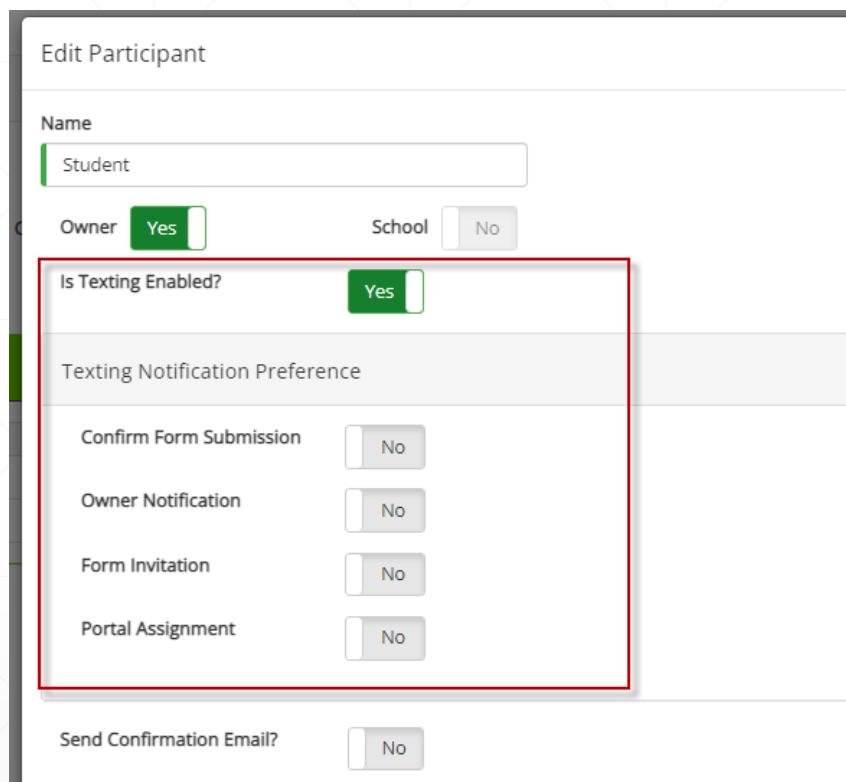
Confirm Form Submission	<input type="checkbox"/> No	Currently disabled
Form Invitation	<input type="checkbox"/> No	
Portal Assignment	<input type="checkbox"/> No	

On a single signature form, in the Name/Type area, Form Designers will see a new option for Texting Enabled?

When Yes is checked, the options for which types of texting is allowed. If the display shows Currently disabled, that option is turned off at the org or tenant level.



# Texting Step 3 – Set up Forms and Participants



The screenshot shows the 'Edit Participant' form. The 'Name' field contains 'Student'. The 'Owner' toggle is set to 'Yes' and the 'School' toggle is set to 'No'. The 'Is Texting Enabled?' toggle is set to 'Yes' and is highlighted with a red box. Below this, the 'Texting Notification Preference' section contains four toggles: 'Confirm Form Submission' (No), 'Owner Notification' (No), 'Form Invitation' (No), and 'Portal Assignment' (No). At the bottom, the 'Send Confirmation Email?' toggle is set to 'No'.

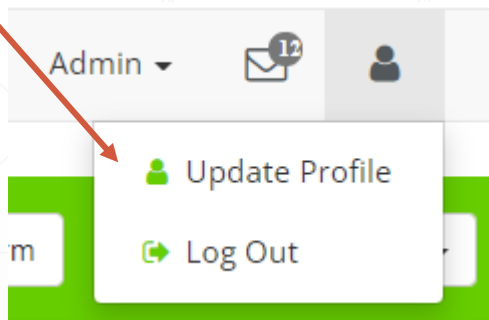
Texting Notification Preference	
Confirm Form Submission	<input type="checkbox"/> No
Owner Notification	<input type="checkbox"/> No
Form Invitation	<input type="checkbox"/> No
Portal Assignment	<input type="checkbox"/> No

For multiple signature forms, texting can be turned on at the participant level. For example, you might want to allow students to be texted, but not faculty and staff.

Like all options you have to turn on texting and the end user (e.g. student) must have elected to allow texting for the text to be received. If the student has not allowed texting and email will be sent instead.

# Final Step: End User Notification Preferences

Users will be able to update their Notification Preferences in the Update Profile area. To utilize texting, a valid cell phone number must be present in the system.



## Change Account Settings

User name

Name

Email

Password

Secret Question

Cell Phone

Notification preferences

# Final Step End User Notification Preferences

End users can now choose to be notified with Email, SMS or both for the different types of form notification processes.

Notification Preferences

If your school supports it, we can send you SMS text notifications rather than email. Please indicate your preferences below

Email	SMS	Both	Notification
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Form Invitation
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Portal Assignment
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Confirm Form Submission
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Payment Confirmation
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Owner Notification
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Cosigner Notification
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Returned Form

Update Preferences









# Texting Pricing

There are two components of texting pricing:

1. An annual fee of \$1,000 which includes 10,000 texts.
2. Plus, if you need more texts, you can purchase for \$.01 per text in blocks of 10,000.

## SMS block purchases

*This is a list of SMS text messages that have been purchased by the school*

+ Add new record			
Create Date	Block Size	Amount Paid	Actions
Tue Jan 11 2022 17:16:32 GMT-0500 (Eastern Standard Time)	5000	0	 Edit  Delete
<div>  1   </div> <div></div>			

# Other Updates

---

# ADA Audit

---

Updates

# ADA Audit

Next Gen engaged a company named Equal Entry (<https://equalentry.com/>) to perform an ADA audit on its forms and form building components (e.g. Short Answers, Choice Lists, etc.).

There are two direct outputs that will be produced from this relationship:

- A new VPAT, WCAG statement
- A best practices guide for Form Designers

Both of these will be available Post-Release. QA changes do not count for Equal Entry.

# Preferred Name

---

Updates



# Preferred Name

Dynamic Forms introduced Preferred Name functionality to help support Title IX and College decisions to allow signatures of the Preferred Name.

Colorado State University (among others) identified areas within Dynamic Forms that are not consistently utilizing the preferred name in the transaction process. For example, the Pending or Cosigner screens.





Shown below – we are using legal first name and last name on this page rather than a desired preferred name and last name.

Pending / Draft Forms			
Form Name	Status	Description	Date
ETO Tracking Form_New	Pending	Started By: Baker Griffith	Signature Request Date: 11/5/2021 2:24:12 PM
ETO Tracking Form_New	Pending	Started By: Mike Gidron	Signature Request Date: 11/4/2021 9:47:56 AM


# **Admin Queue - View Attachments**










# Admin Queue –View Attachments

Currently, if users click on an attached image in the queue, the image will download completely to be viewed. Now, the image will be viewed in a new tab, and be available for download if desired and permitted.

 Dynamic Fins University Go  My Forms ▾ Admin ▾  12  

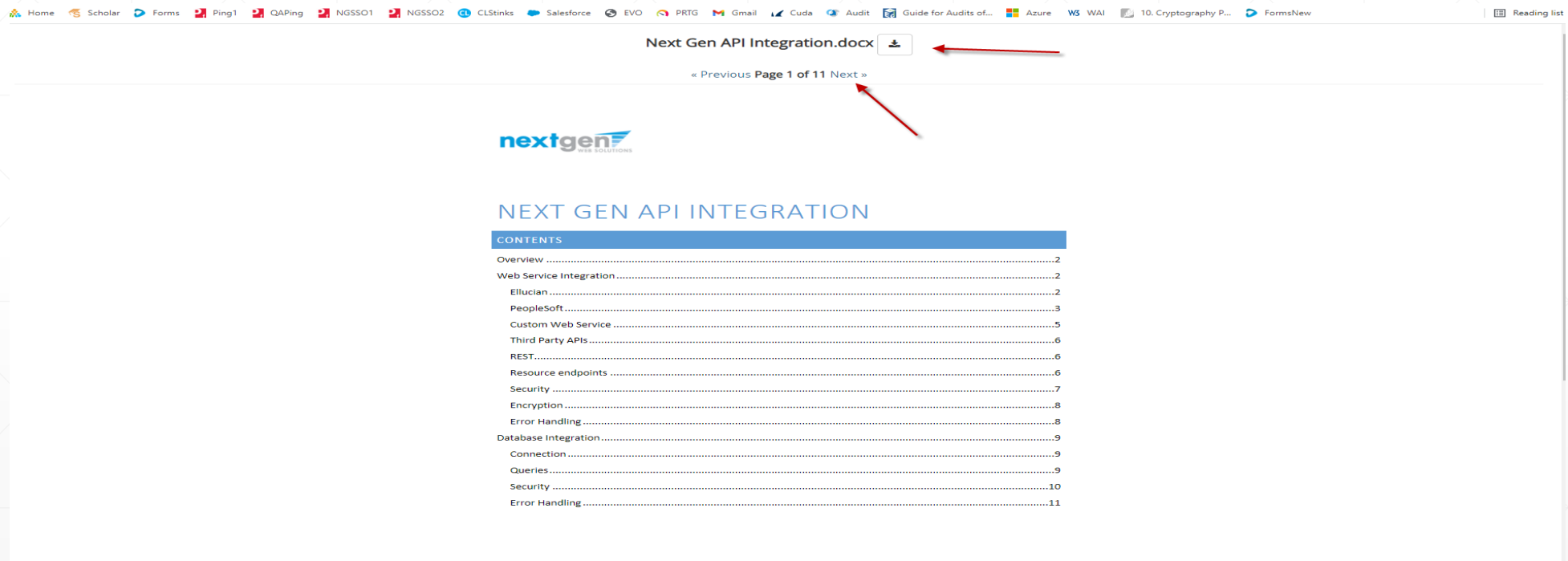
Document Upload Cover Page - No Login

All Statuses **3** Pending **3**  Selected Actions ▾ Export Preference 

Action	PDF	Html	Audit	<input type="checkbox"/>	Form Status	Submit Date ↓	ESign Date	ESigned By	Is Processed	Is Image Processed	FileUpload1
Actions ▾				<input type="checkbox"/>	Pending	8/30/2021 10:37:36 AM					<a href="#">download</a>
Actions ▾				<input type="checkbox"/>	Pending	12/12/2020 11:37:34 AM					<a href="#">download</a>
Actions ▾				<input type="checkbox"/>	Pending	4/24/2020 1:44:07 PM					<a href="#">download</a>

# Admin Queue – View Attachments

Here is a look at the new attachment viewer. Users can download the attachment after viewing it (if they have permissions to that enable downloads)



# Choice List Enhancement

---

# Choice List Enhancement

We're now storing the choice list entries that the user gets back from the API rather than updating a global list. We also fixed the triggers where "choice list from API" fires.

This fixes two issues:

1. That “Cap and Gown” form where everyone's list was different (so if someone else started filling out the form, the first person's list got overwritten)
2. Asif's issue where a slow API call was being made for every person who started filling out the form.

# End Release 10

---