

Dynamic Forms

Release 11 – Release Notes

Release 11

Release Notes

Release 11 Summary

Huge new release with the following changes:

- No Sign Workflow
- Proxy Functionality
- E-mail Distro functionality
- Auto-Escalation Functionality
- Conditional Emails
- And more!

Release 11 Summary

Do you need to request these features?

New Functionality	Must Request or Default?
No Sign Workflow	Given by Default
Proxy Functionality	Need to Request
E-mail Distro functionality	Given by Default
Auto-Escalation	Given by Default

No Sign Workflows!

Release 11 - Enhancements

No Sign Workflows

The Dynamic Forms team is introducing the ability to have a participant interact with a form without needing to electronically sign the form.

Important!!! This will enable our users to create new workflows which include:

- No sign workflows with authentication

(the user would still need to log into Dynamic Forms)

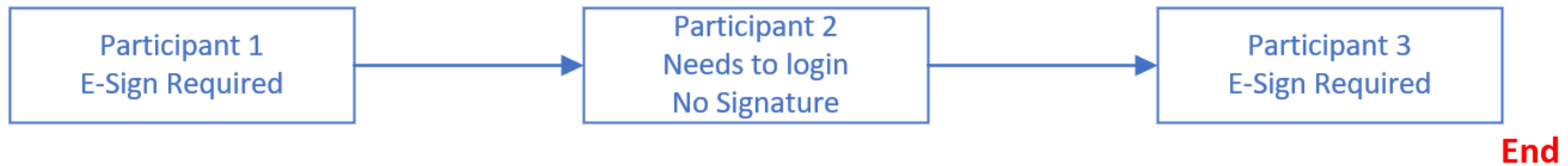
- No sign workflows without authentication

(anyone with the link to the form can use that link to interact with the form).

No Sign Workflows

Flavor 1: Authenticated User, no signature required

Start – Use Case 1



Start – Use Case 2



Start – Use Case 3



No Sign Workflows

Flavor 2: Non-authenticated User, no signature required

Start – Use Case 1



Start – Use Case 2



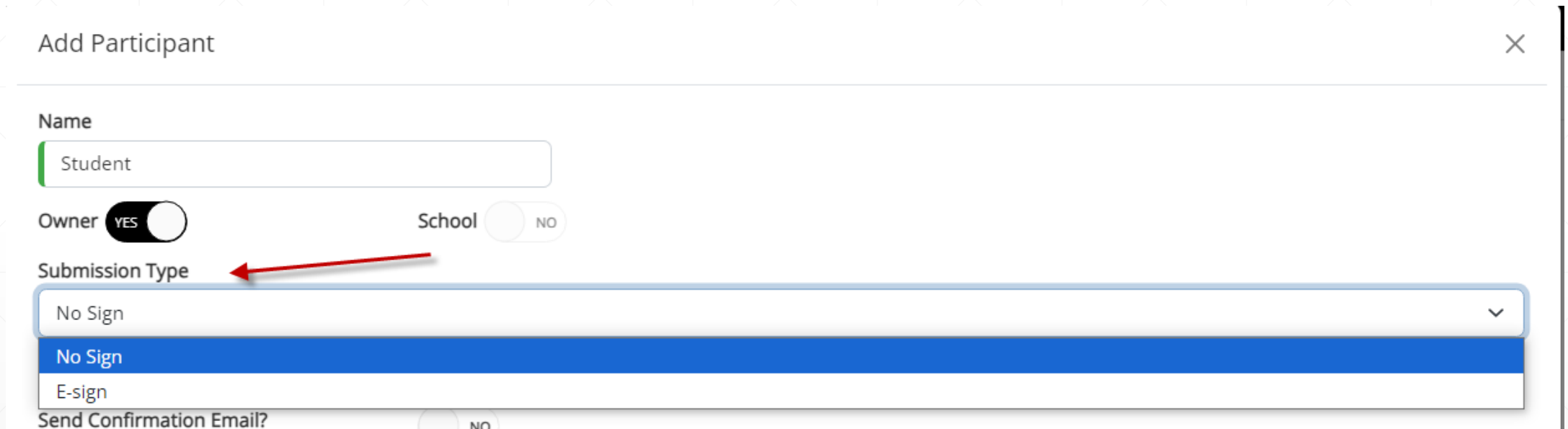
Start – Use Case 3



No Sign Workflows

On each workflow Participant profile, there are two new fields, the first:

Submission Type: Choose if the participant must sign or not sign the form



The screenshot shows a web form titled "Add Participant" with a close button (X) in the top right corner. The form contains several fields: a "Name" text box with "Student" entered; "Owner" and "School" toggle switches, both currently set to "YES"; a "Submission Type" dropdown menu; and a "Send Confirmation Email?" toggle switch set to "NO". The "Submission Type" dropdown is open, showing three options: "No Sign" (highlighted in blue), "No Sign", and "E-sign". A red arrow points to the "Submission Type" label.

Add Participant

Name

Student

Owner YES

School NO

Submission Type

No Sign

No Sign

E-sign

Send Confirmation Email? NO

No Sign Workflows

If No Sign is selected, you will see the second new field:

Requires Authentication? – you will choose whether this participant must sign in to complete the form


Add Participant

Name
Student

Owner ☒ YES School ☐ NO

Submission Type
No Sign

Requires Authentication? ☐ NO



No Sign Workflows

Important!!! Remember on this flow:

- No sign workflows ***without authentication***

(anyone with the link to the form can use that link to interact with the form).

- Dynamic Forms will only track the IP address of the computer completing the form, we cannot:
 - Track the individual who submitted the form
 - Verify that even that if the form went to a specific email address that that email address/person submitted the form (the person could have forwarded the email to another person, or other)
 - Most times the IP address is not specific to a person, so IP is not an identifier (even with a police warrant!)

If you need to track who submitted a form remember to use:

- No sign workflows **with authentication**

(the user would still need to log into Dynamic Forms)

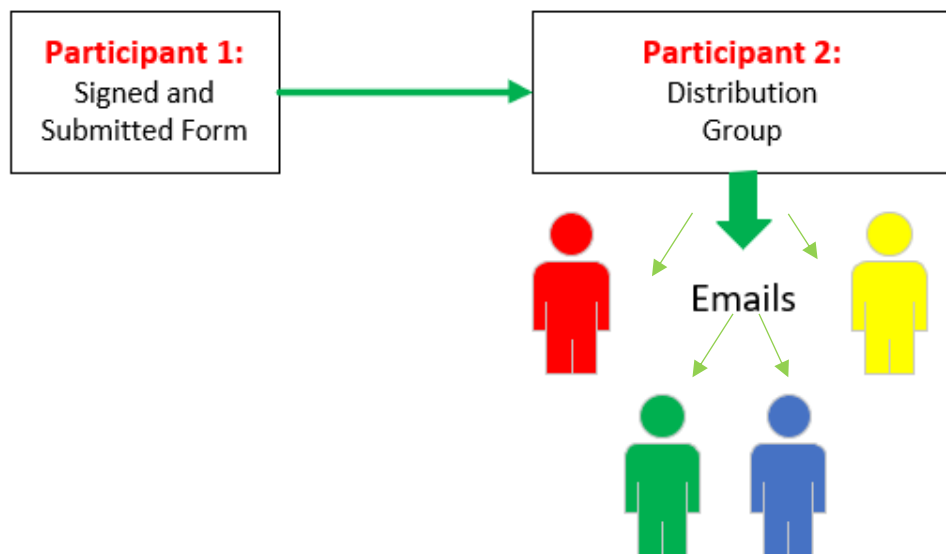
E-mail Distro Functionality

Release 11 - Enhancements

Distro Email Functionality

Currently, some clients are using email distribution groups to help workflow management. This is typically done one of two ways:

1. Using the Dynamic Forms User Group Functionality
2. Using a school-created Email Distro Group



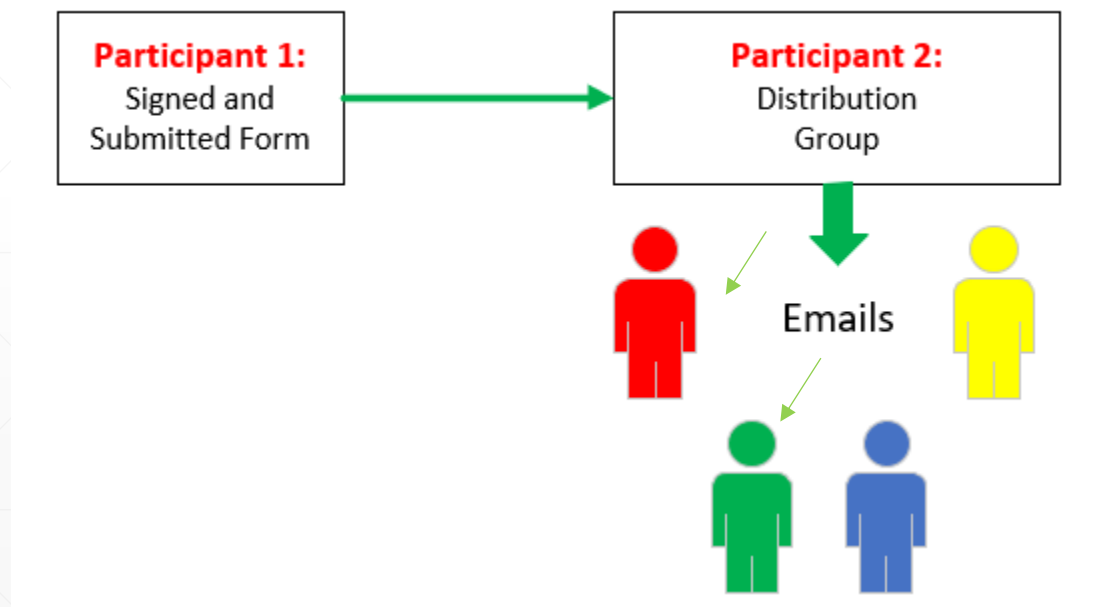
These distro groups help communicate to that group that there needs action to be taken on a form.

The problem is (in either scenario, school Distro or DF User Group) that all members of the Distro are getting emails instead of just that one Distro group email.

Distro Email Functionality

With this new release, Admin Users can create User Groups in Dynamic Forms that now allow you to control which of the users in the User Group will receive the email notifications.

Now in this case, we have created a User Group whereby only the users with holiday colors (red and green) will be emailed when there is action to be taken on the form.



Distro Email: Using Dynamic Forms User Groups

Below is an example of a Dynamic Forms User Group where instead of all group members being emailed to interact with the form, only Jim is going to be emailed as only he has the “Send Email” box checked in the User Group screen (see below).

User Group Details

[Back to User Groups](#)

User Group Name

Description

Owned By

Graceland

Save

User Group Members

[Add members](#)

First Name	Last Name	Email	Send Email	Action
Jim	Grace	jim.grace@ngwebsolutions.com	<input checked="" type="checkbox"/>	Action ▾
Jonathan	Makofske	mako@ngwebsolutions.com	<input type="checkbox"/>	Action ▾
SamTest	VellerTest	samveller@bellsouth.net	<input type="checkbox"/>	Action ▾

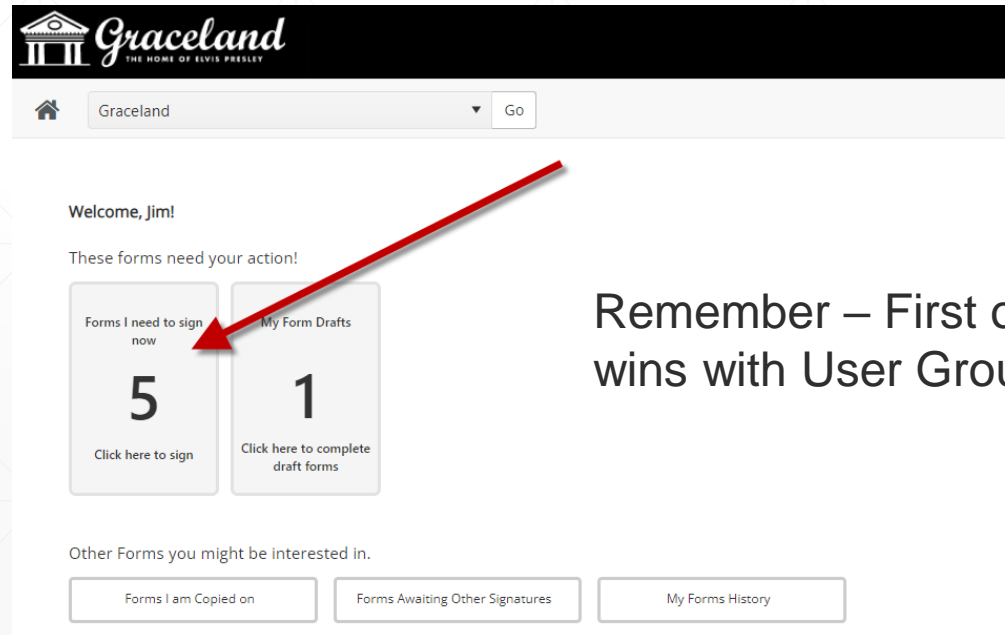
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50 items per page

1 - 3 of 3 items

Distro Email: Using Dynamic Forms User Groups

Since all the other users are still in the User Group however, each of these other group members would be able to log into Dynamic Forms and interact with any forms sent to this group. They would see them in the “Forms I need to Sign” area if the form has not already been signed by another member of the group.



Remember – First one in wins with User Group signings.

Distro Email: Client created Distro Groups

If a client does have the ability to create an email group that does not automatically send emails to its distribution group, the User Group could look like something below. Here the distribution group email is created as a Dynamic Forms account and will be sent the email. The other members are also in the group to allow them to interact with the form with their own individual use account.

User Group Details

[Back to User Groups](#)

User Group Name

Description

Owned By

Graceland

Save

User Group Members

[Add members](#)

First Name	Last Name	Email	Send Email	Action
NextGen	Distro	ngdistro@ngwebsolutions.com	<input checked="" type="checkbox"/>	Action
Jim	Grace	jim.grace@ngwebsolutions.com	<input type="checkbox"/>	Action
SamTest	VellerTest	samveller@bellsouth.net	<input type="checkbox"/>	Action

1

50

items per page

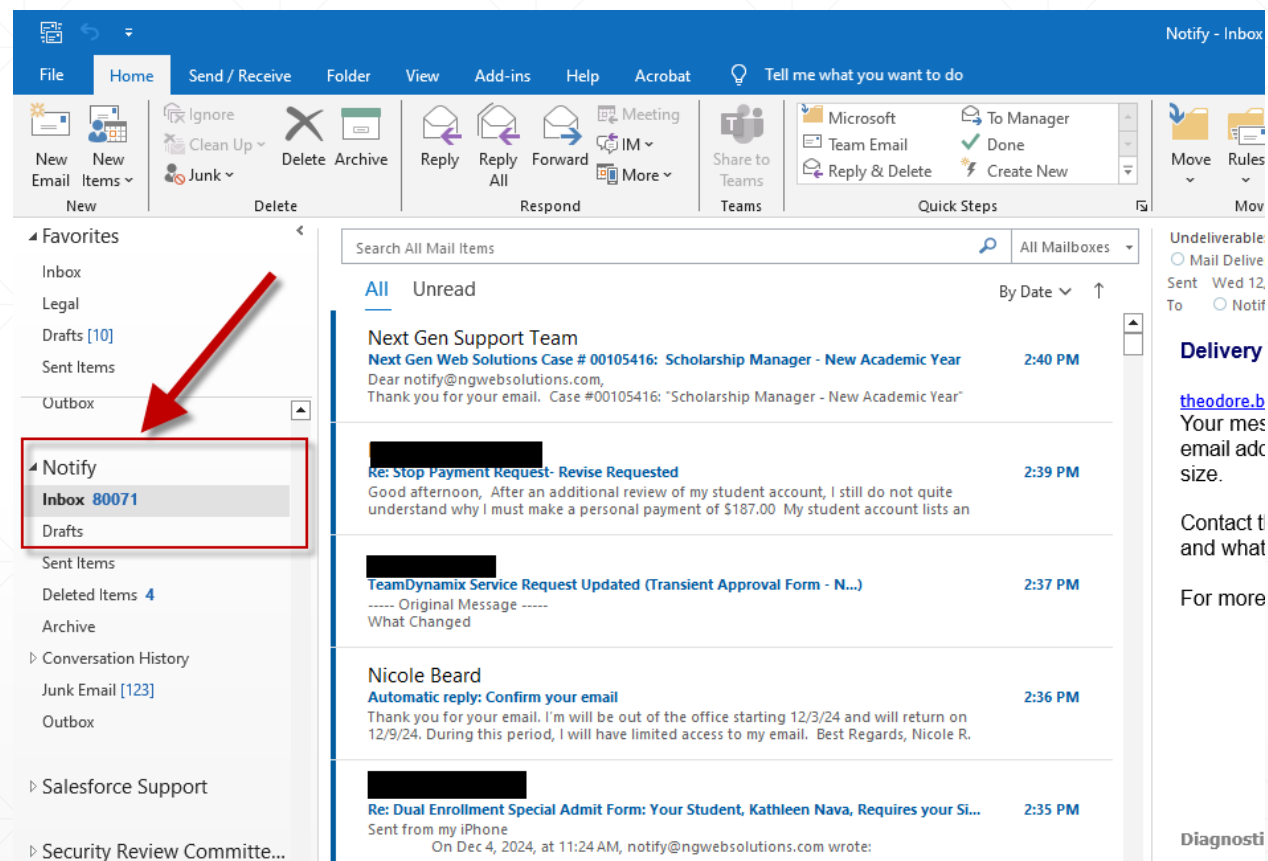
1 - 3 of 3 items

Distro Email: Client created Distro Groups

As an example, I am a member of a couple of Outlook Distros whereby I do not get an email each time the group gets an email, but can log into the mailbox and see the activity.

See the Notify group to the right here.

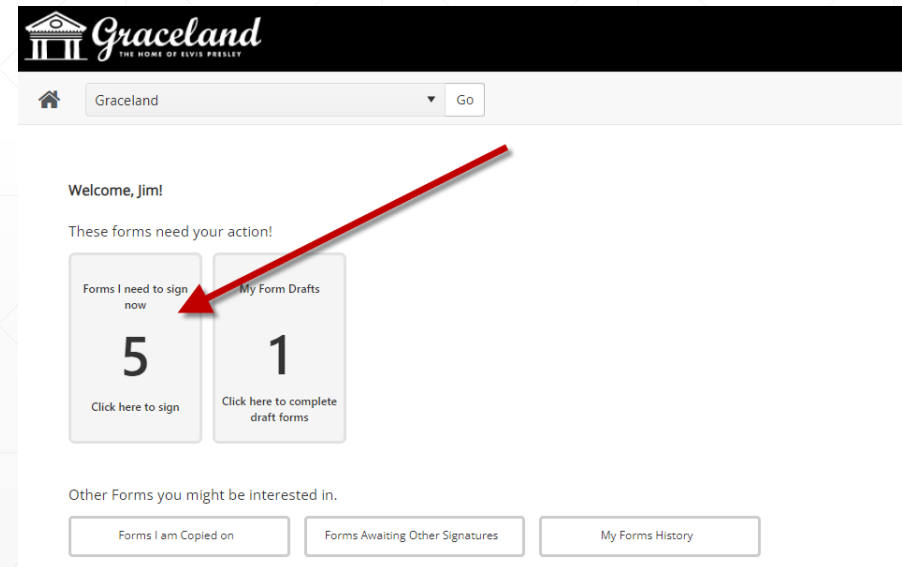
This is the way clients can consider setting up their distro group also.



Distro Email: Client Created Distro Groups

As with the Dynamic Forms User Group setup, since all the other users are still in the User Group however, each of these other group members would be able to log into Dynamic Forms and interact with any forms sent to this group (they would not need to goto their Distro Group mailbox, just log into Dynamic Forms).

Again, they would see them in the “Forms I need to Sign” area if the form has not already been signed by another member of the group.

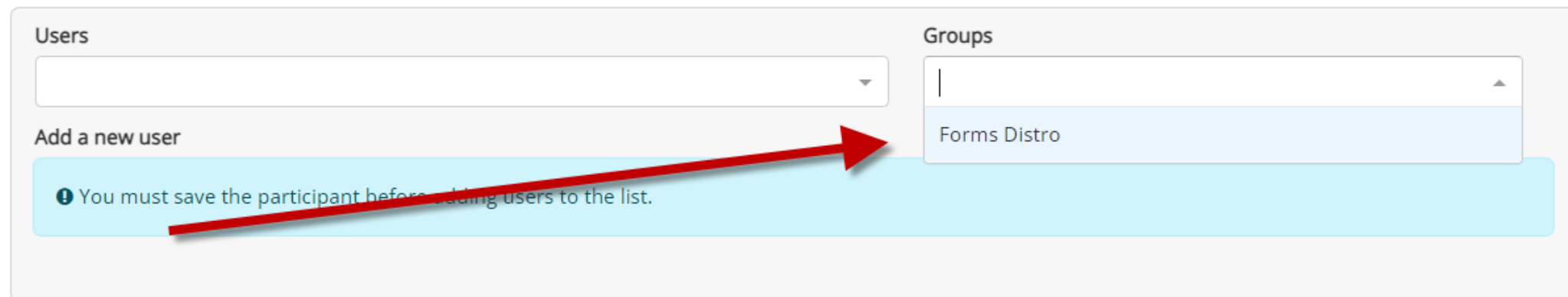


Distro Email Functionality

For those who have not used our User Groups before, its super simple to add that group as a participant to the workflow – see below....

How will this participant be designated?

- ☐ The 'Student' user will specify the user
- ☐ I will specify the user
- ☐ The 'Student' user will choose from a list I provide
- ☐ The 'Student' user will choose from a list obtained from an API call
- ☒ I will specify multiple users / groups
- ☐ The participant will be designated from values collected on the form
- ☐ The participant will be a group designated by API call



The screenshot shows the configuration interface for adding a participant to a workflow. It features two main sections: 'Users' and 'Groups'. The 'Users' section has a text input field and a dropdown arrow. Below it is a link 'Add a new user'. The 'Groups' section has a text input field with a dropdown arrow, and a list item 'Forms Distro' is visible. A light blue banner at the bottom contains a warning icon and the text 'You must save the participant before adding users to the list.'.

Users

Groups

Add a new user

! You must save the participant before adding users to the list.

Proxy!!

Release 11 - Enhancements

Proxy Functionality

An electronic signature proxy refers to the practice of allowing one individual to electronically sign a document on behalf of another person.

The signature proxy is commonly used in business, legal, and governmental contexts where a representative is needed to execute a document on behalf of a principal, ensuring that the signing process can continue without the direct involvement of the original signer.

The proxy is authorized to apply their electronic signature, with three things being true:

1. The client has agreed to allow proxy signatures
2. The user has agreed that an individual can have proxy rights to electronically sign for them
3. The form (and the body it represents) allows signature proxies

Proxy Designation



An example: Here Mother Nature is taking a well-deserved vacation to Mount Kilimanjaro where that area has neither internet nor cell phone service. Therefore, she would like her son the Heatmiser to handle matters for her when she is gone.

User: Mother Nature
VP of Earth



*Wants to give
signature proxy
to Heatmiser*



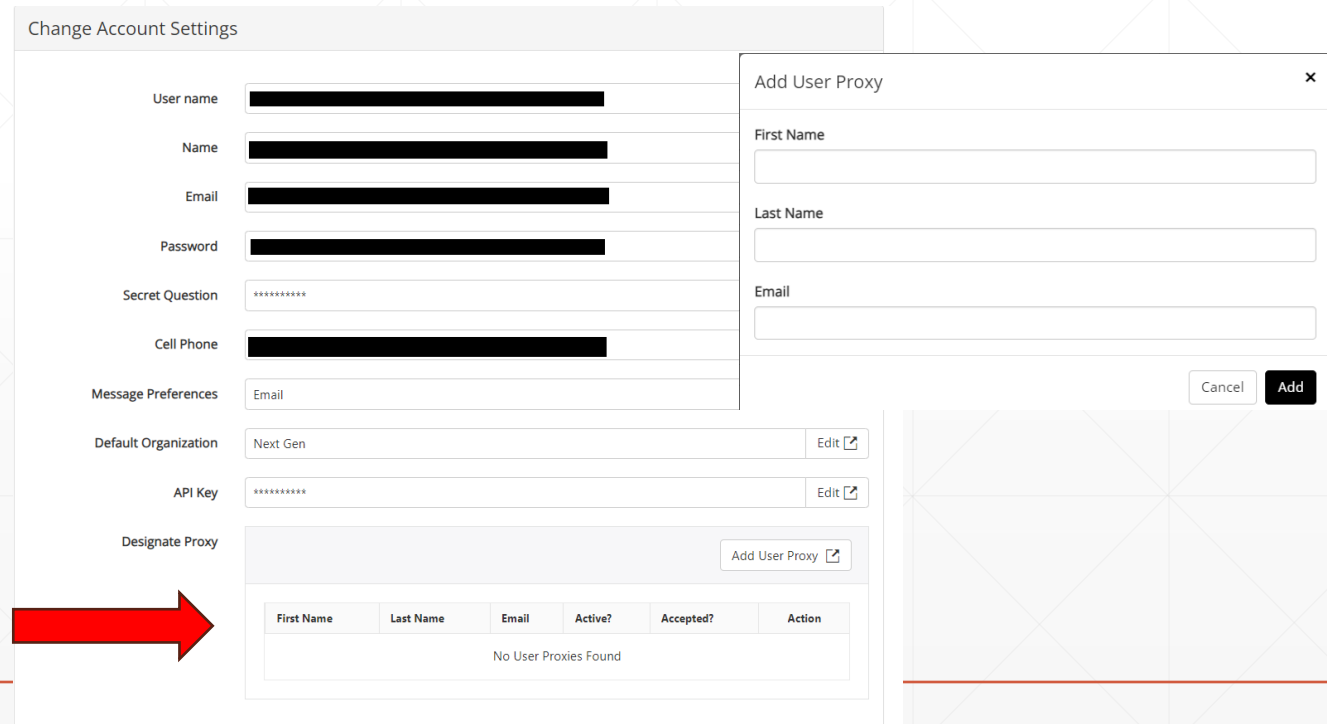
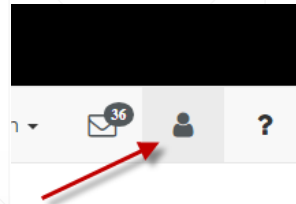
User: Heatmiser
Assistant to VP



Proxy Designation

1st Step: Mother Nature must designate Heatmiser as an approved proxy for her.


She would log into Dynamic Forms and click on the Update Profile icon from the Dynamic Forms main menu. Next she would click on the “Designate Proxy” area to enter her first proxy (we allow up to three proxies per user).

A screenshot of the "Change Account Settings" form. The form has several sections: "User name", "Name", "Email", "Password", "Secret Question", "Cell Phone", "Message Preferences", "Default Organization", "API Key", and "Designate Proxy". The "Designate Proxy" section is highlighted with a red arrow. It contains a table with columns: "First Name", "Last Name", "Email", "Active?", "Accepted?", and "Action". The table is currently empty, with the text "No User Proxies Found" below it. To the right of the table is a button labeled "Add User Proxy".


Proxy Designation

Still 1st Step – After keying in the proxy’s information, the screen will change and now Mother Nature can view the status of the proxy. In this case, the proxy has been emailed a request to be a proxy, indicated by the statuses of Active but not Accepted. Until the proxy accepts, they will not be able to sign for that User.

User: Mother Nature
VP of Earth



Designate Proxy

Add User Proxy 

First Name	Last Name	Email	Active?	Accepted?	Action
Heat	Miser	samveller@bellsouth.net	Yes	No	Action ▾

Proxy Designation

2nd Step: Heatmiser will receive an email requesting that he decide on whether he wishes to be a proxy for Mother Nature.

User: Heatmiser
Assistant to VP




Proxy Designation

3rd Step: Mother Nature will receive an email notification that Heatmiser has been validated as an approved proxy for her. If she logs into Dynamic Forms, she will also see that under the Designate Proxy area,

User: Mother Nature
VP of Earth



Designate Proxy

Add User Proxy 

First Name	Last Name	Email	Active?	Accepted?	Action
Heat	Miser	samveller@bellsouth.net	Yes	Yes	Action ▾

User: Heatmiser
Assistant to VP



Proxy Designation

When co-signer requests are sent to Mother Nature (the designated participant) the new proxy (Heatmiser) will also be sent that co-signer request. Both Mother Nature and Heatmiser have access to interact with that form.

And much like user groups today, the first one to the form wins. If Mother Nature signs the form, her proxy(ies), if they attempt to complete the form, will be notified that the form has already been signed.

Release 11

Release Notes – End of Notes