Dynamic Forms

Release 9 Release Notes

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Release 9 Summary (Page 1 of 4)

Expected Production Date – December 10th – 7:00am

- First off, there are pages and pages of changes, so get some coffee.
  - The Dynamic Forms code infrastructure as been rewritten in .NET Core

    That is the reason for the length time between the last release and this release.

    We could not piecemeal this release, it was all or nothing.

    We will return for more frequent releases (about 3 per year) hereafter
- The core features of the form designer, form rendering, workflow remain relatively unchanged besides the new features described here
- User acceptance testing has hit the four major browsers(plus old I.E. 11 for end users only), the two main mobile device/browsers and JAWS, ZoomText and VoiceOver for ADA/Screen reading/Screen modification tools

Release 9 Summary (Page 2 of 4)

- Core Functionality Enhancements
  - Upgraded Home Page - more insight to drafts, opt-outs and deletes
  - Due to Client Feedback – “Rejected” has been renamed “Returned For Revision”
  - Modified Queues – search and reports options, auto archive, enhanced cosigner view
  - Improved Admin / Profile screens
  - Improved tenant infrastructure helps with current and future reporting
  - Upgraded Pending/History forms screens
    - Search within the pages
    - Delete Drafts for end users

Release 9 Summary (Page 3 of 4)

New Functionality being introduced

- Invitations! End user are invited to complete a form
  - File Upload – enables admins to upload a excel/text file of people and prefill a form in with data from the file
  - API invitations – begin the process with a trigger from an API
- End User Portal Functionality ($2,000 add-on / per year)
  - Forms portal for all users
    - Forms can be Assigned to individual Users
    - Users can find any forms available to that end user
    - Custom URL – myschool.dynamicforms.com

Release 9 Summary (Page 4 of 4)

New Functionality being introduced - continued

- End Form Logic
- Reject back more than one participant
- Group members only editable by the organization admins that created it
- Form Groups
- File upload limits – both on size and type
- Forms now Autosaved
- New Email Server – SendGrid – option to send your own emails
- New API functionality – map multiple rows – e.g. populating class schedule

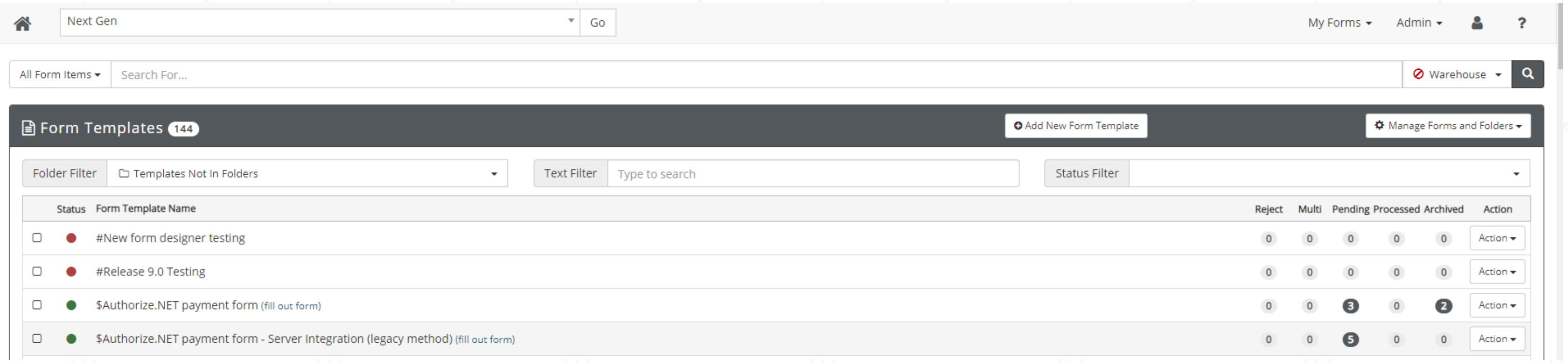
Release 9

December 8, 2020 Release Date

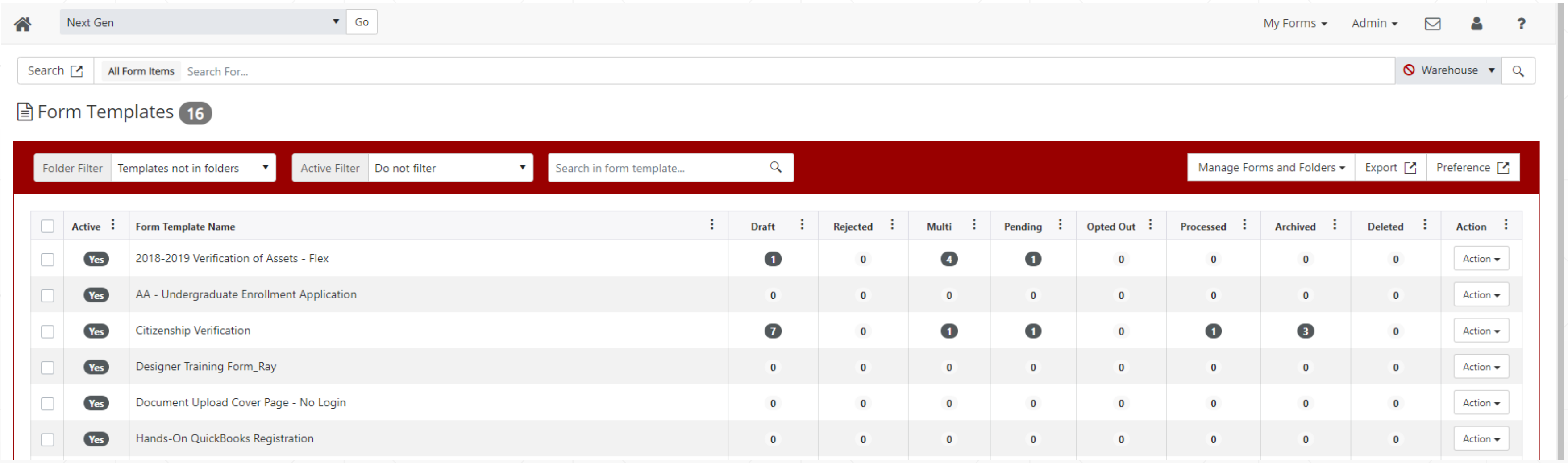
Admin Home Page

New Enhancements

New Look



We attempted to improve the site without completely overhauling and changing the current flow of the system.



The Homepage includes new items outlined in the next few pages, but overall the user experience minics the current production site – and new Help items are available also.

New Homepage – Small Differences

1 Column for Invitations See page 43.

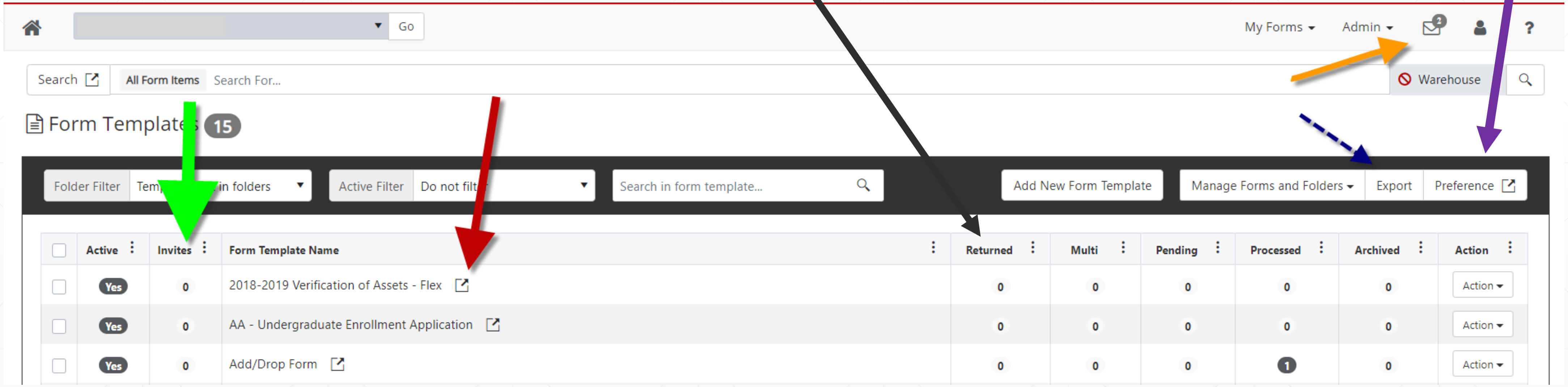
2 Rejected is now Returned

3 Fill out Form text is now an icon to help save space.

4 Message inbox shows status of file uploads introduced later.

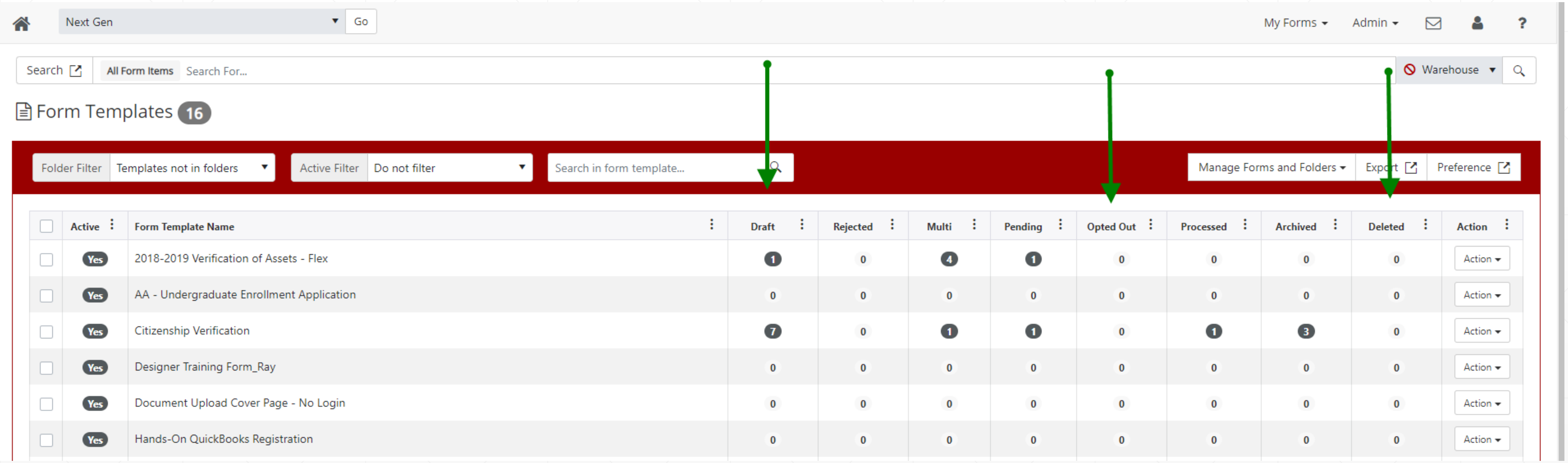
5 Export button enables printing of contents of this page.

6 Preferences Button See p11.



New Homepage Form Statuses

Using the Preferences Button all form statuses can be seen on the Homepage. This means that Form Administrators will never lose sight of a form in process (even Opt Outs and Deletions).   Also, with the addition of the Drafts forms status, Admins can now see progress of end users in the prior to form submission.

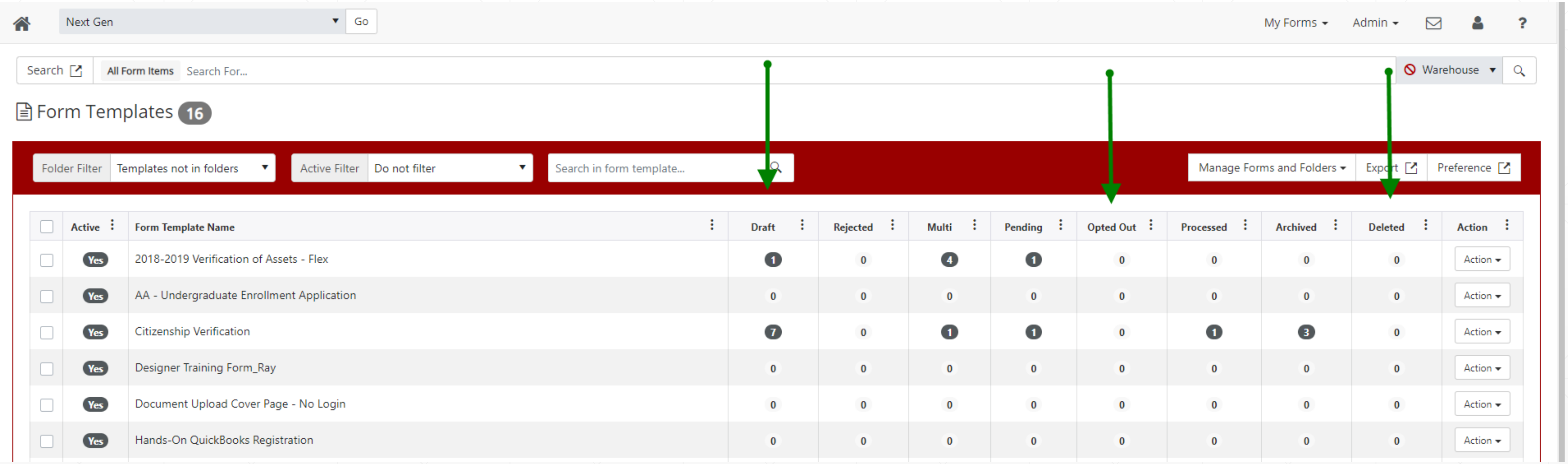


Active	Form Template Name	Draft	Rejected	Multi	Pending	Opted Out	Processed	Archived	Deleted	Action
Yes	2018-2019 Verification of Assets - Flex	1	0	4	1	0	0	0	0	Action
Yes	AA - Undergraduate Enrollment Application	0	0	0	0	0	0	0	0	Action
Yes	Citizenship Verification	7	0	1	1	0	1	3	0	Action
Yes	Designer Training Form_Ray	0	0	0	0	0	0	0	0	Action
Yes	Document Upload Cover Page - No Login	0	0	0	0	0	0	0	0	Action
Yes	Hands-On QuickBooks Registration	0	0	0	0	0	0	0	0	Action

Expanded Queues and Preferences

Admins users can customize their Homepage to see these additional Form Statuses. Changes made will only affect the individual user.

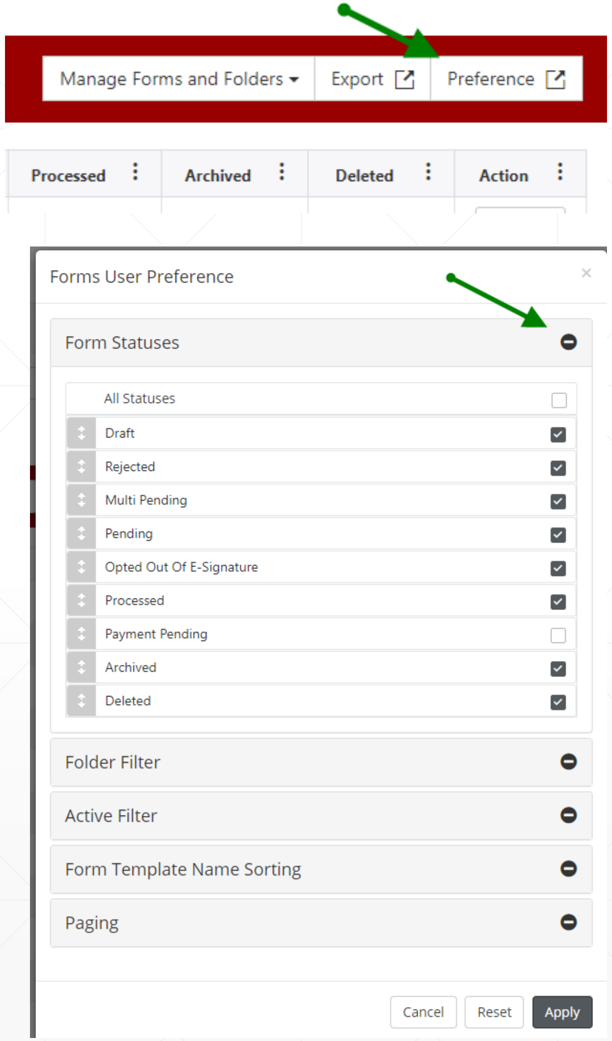
These form statuses can be shown in the order you prefer to see on the screen.



Expanded Queues and Preferences

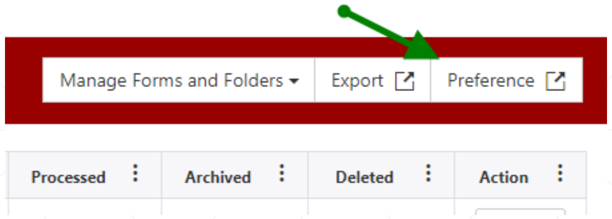
By clicking the Preference button on the Homepage, Dynamic Forms will open a screen that allows you to customize your Homepage a number of ways, including the seeing the additional form statuses.

Admin users can place a check mark next to the form statuses they would like to view on their homepage, then create the order that those statuses will be seen.   Just click Apply and your new customized Homepage is waiting for you.



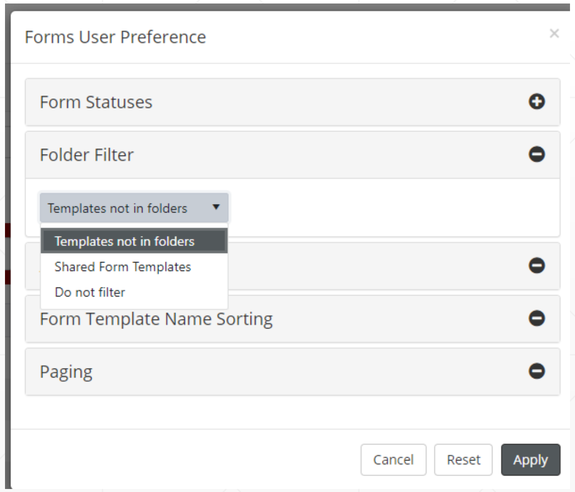
Other Homepage Preferences

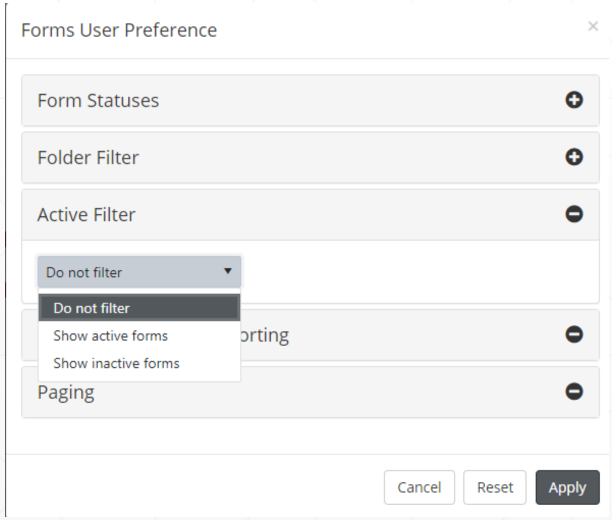
While we are here let's look at the other preferences



Folder Filter: If you are fan of putting forms in folders, your homepage can now default to a folder.

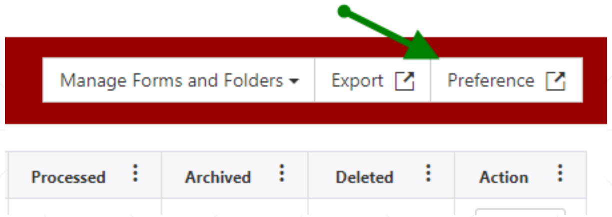
Active Filter: Now you can default the homepage to only show active forms if desired.



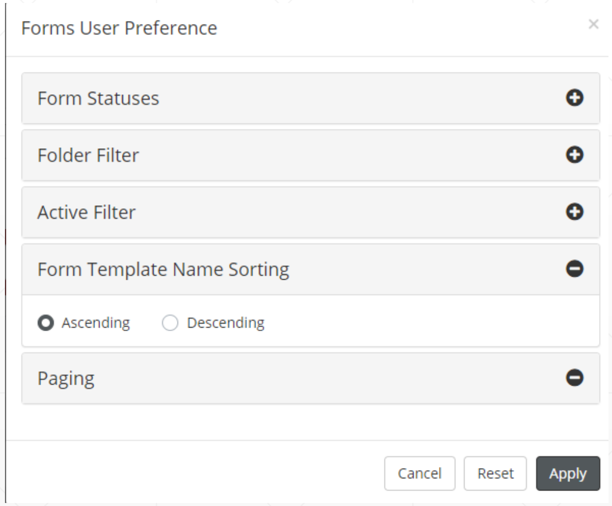


Other Homepage Preferences

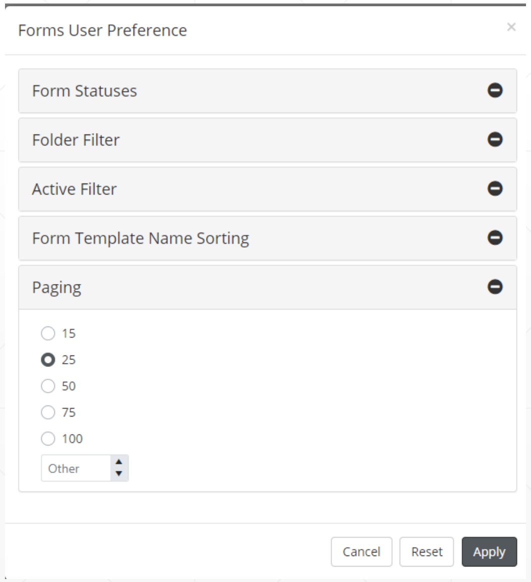
While we are here let’s look at the other preferences



Template Name Sorting: Maybe you like to see things Z-A instead of A-Z. If so, you can adjust how forms are sorted on the Homepage.

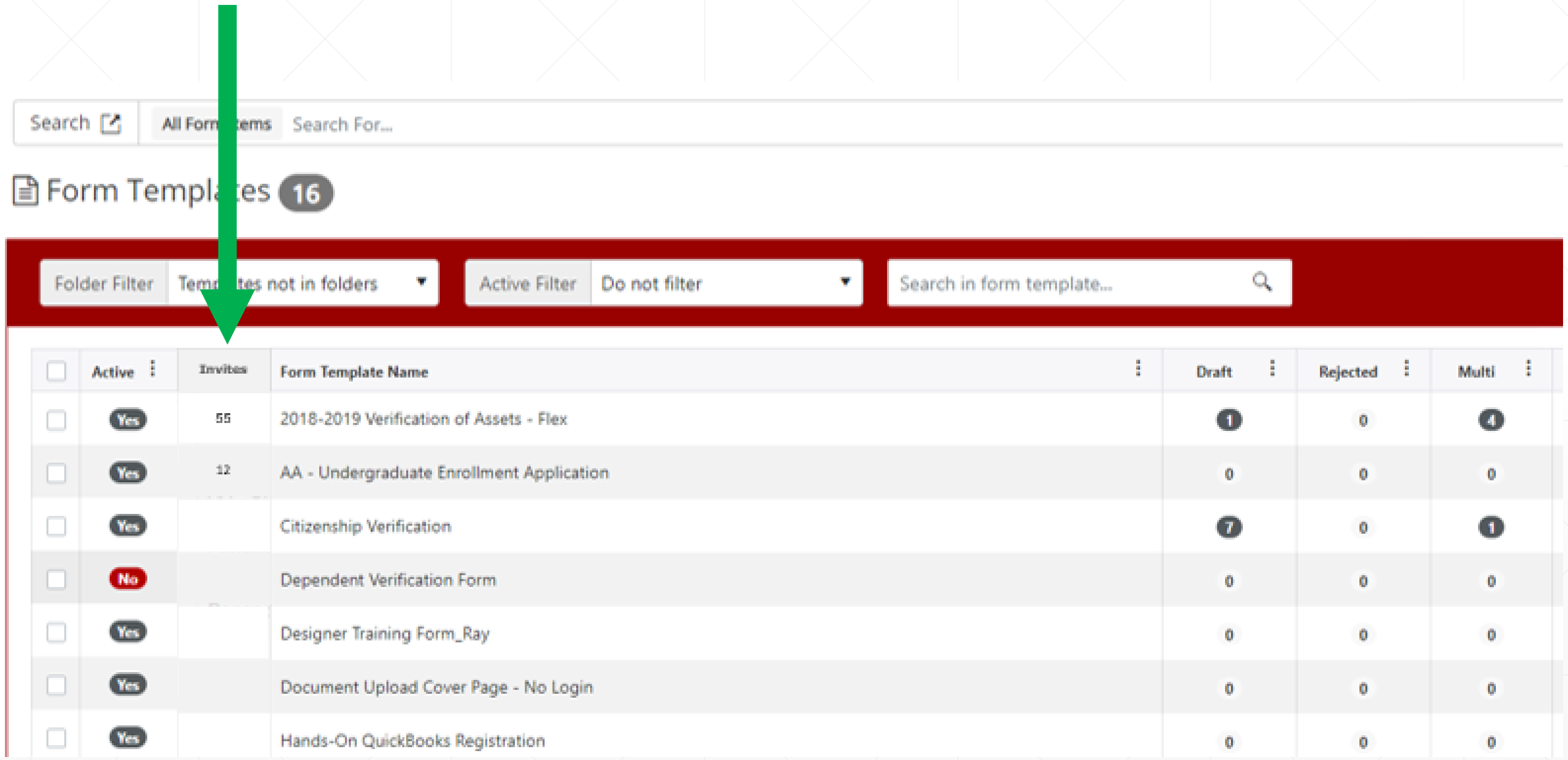


Paging: Instead of showing all forms on the Homepage, you can limit the templates you see.



New Column - Invitations

For colleges using invitations, there will be a new column on the Homepage that reminds you that this form template has invitations associated with it.   More about Invitations later….



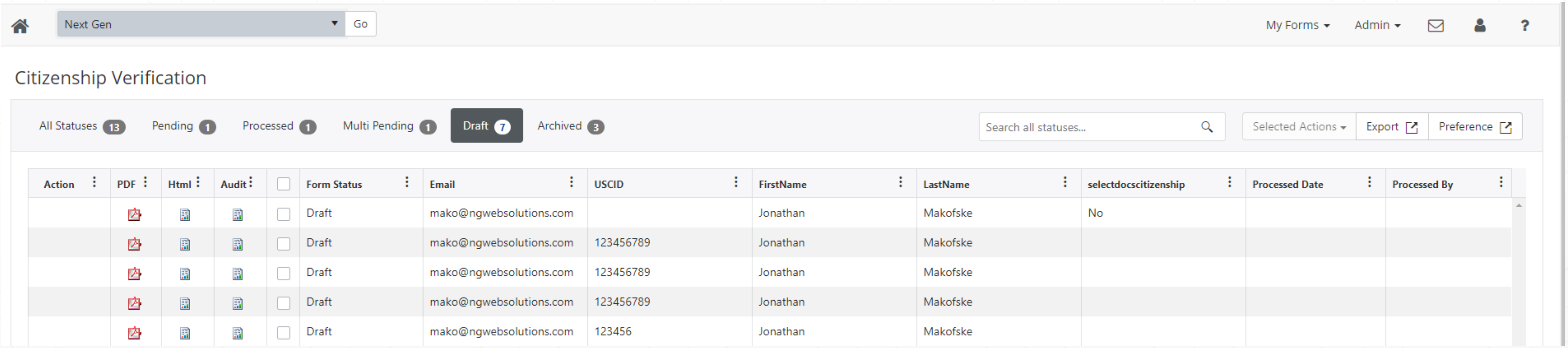
Form Queues

New Enhancements

Form Queues

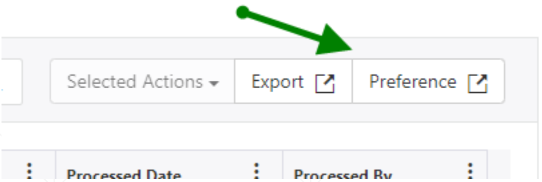
The forms queues have all been rebuilt and enhanced.
The big changes are

- Preferences – you choose the fields to be seen and in which order
- Search – you are now able to search in the queues
- All Statuses – you have the option to see all forms statuses on one screen



Form Queue - Preferences

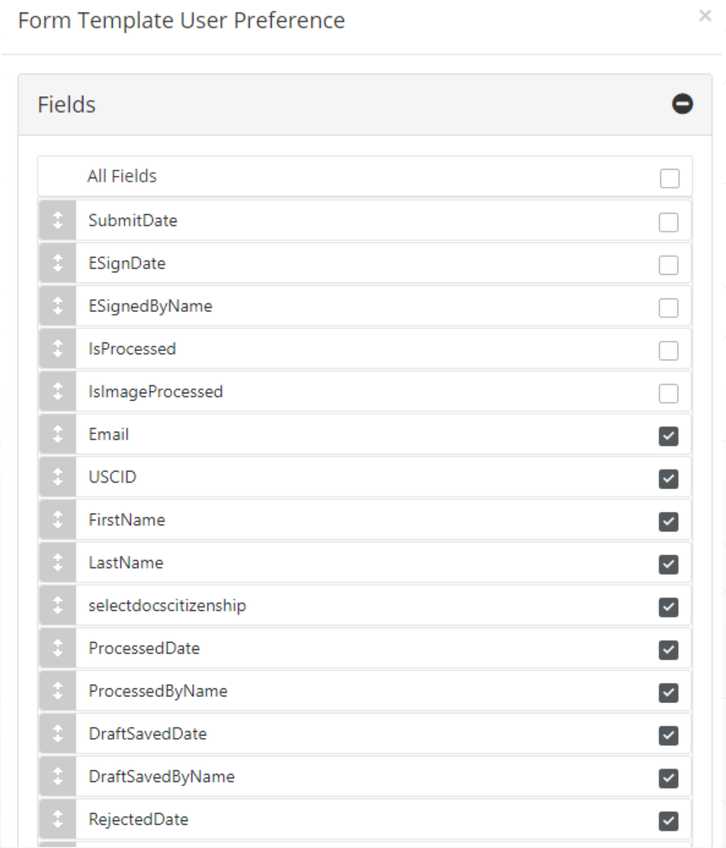
On the top right side of the queue, you will see the preference button.   There are three options:



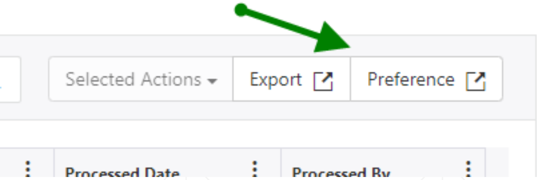
Fields: Here you are not only able to choose the fields you wish to see in the queue, but also the order they are in.

Just check the fields you wish to see and then drag and drop the field to the location you wish to see that field in the queue.

We have also enhanced the queues to allow sorting on Multi-sign status of “Complete” commonly used in with the School Use Only workflow.

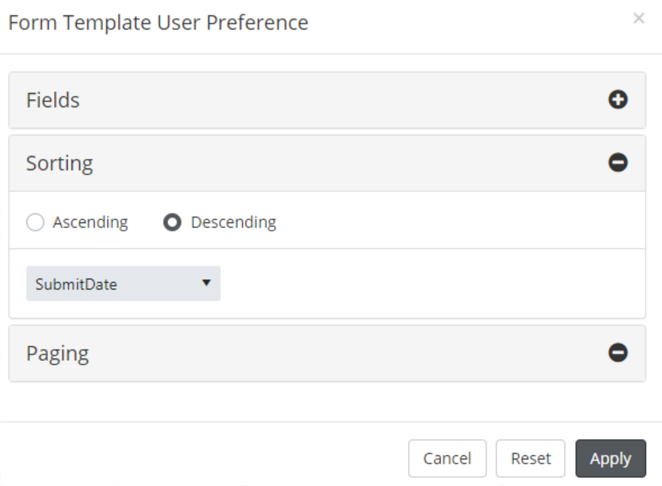


Form Queue - Preferences

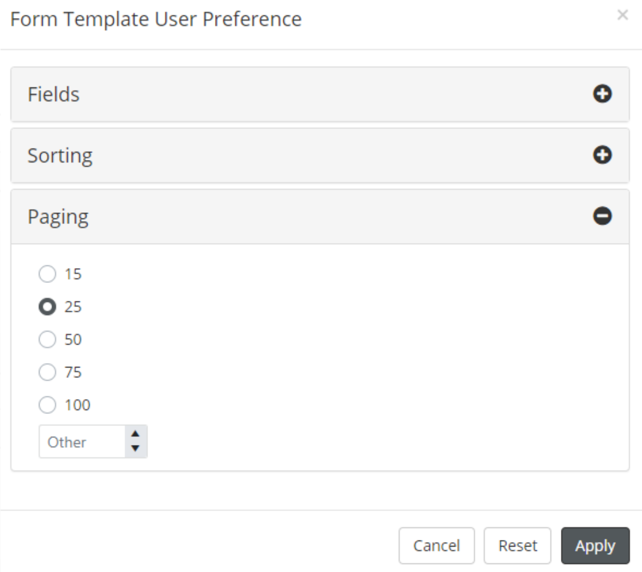


While we are here let's look at the other preferences

Form Sorting: Maybe you like to see things 9-1 or Z-A instead of 1-9 or A-Z. If so, you can adjust how forms are sorted in the queue.

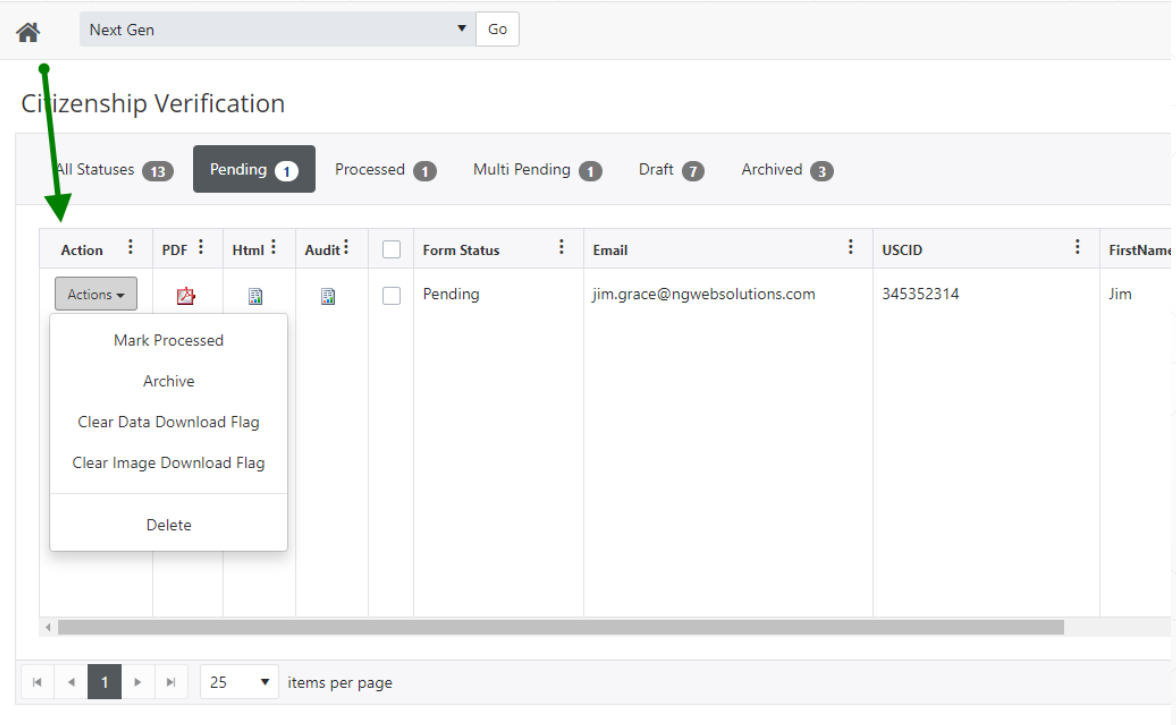


Paging: You can now determine the number of forms to be seen per queue page.



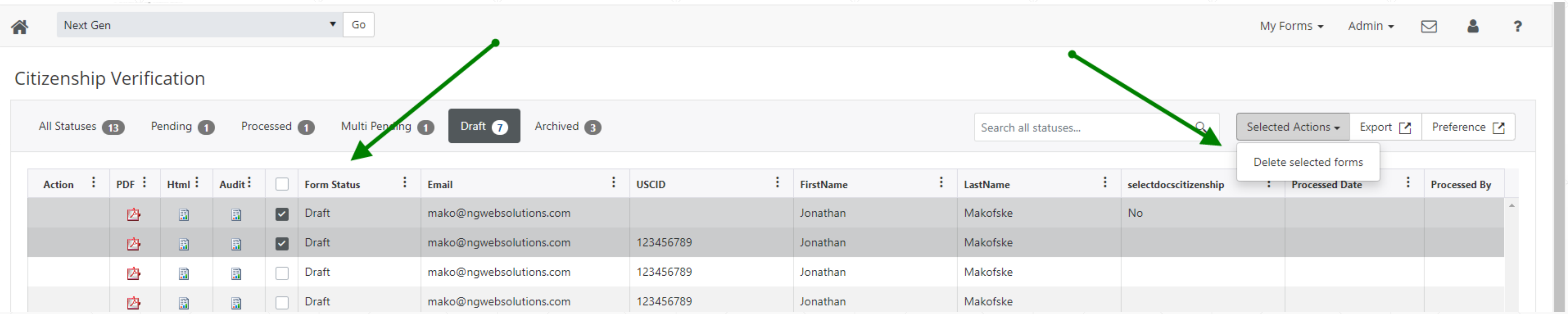
Queue Actions – Single Form

Admin Users (with permissions) can now see possible actions associated with all forms in queues.   For single form changes, use the column on the left.



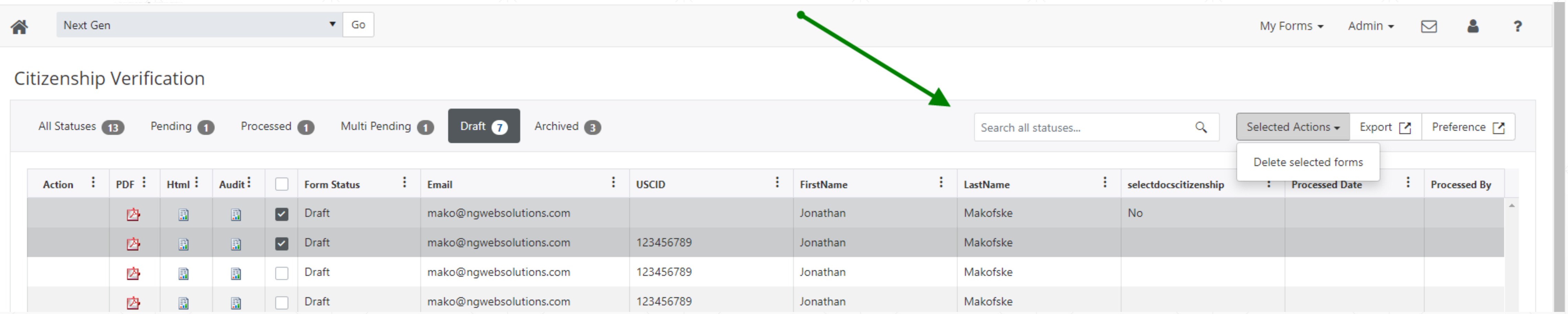
Queue Actions – Multiple Forms

Admin Users (with permissions) can select multiple forms to take action on and use the "Select Actions" button on the menu to make those changes.



Queue Search

Admin Users can search from the Homepage to find forms.   However they can also now search from any queue to find data within that queue. In the example below, if there was a search for Smith – the draft forms queue for the form template Citizen Verification would be searched for any field populated with “smith” (results from other queue or other form templates will not be shown).

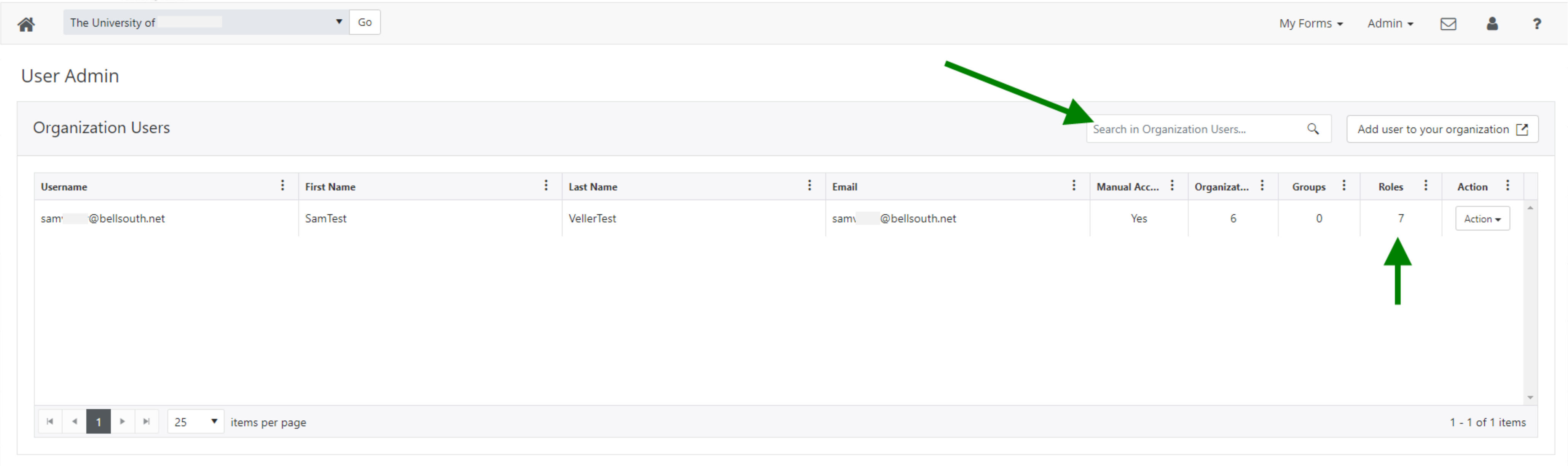


User Admin Screens

New Enhancements

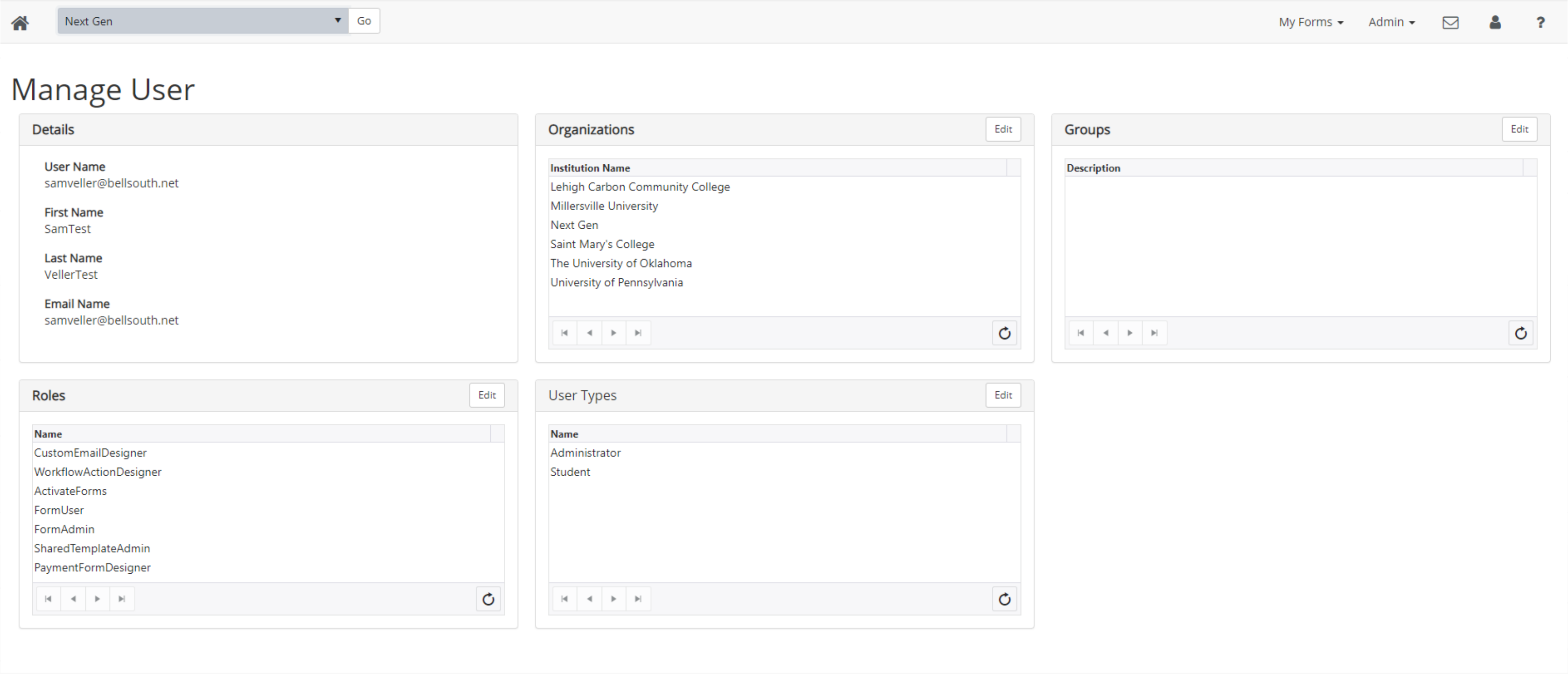
User Admin Screens

User Admin Screens have been modified with search functionality and we expect to be much more intuitive to use.   Admins can find users by using the top search areas now.   Also, admins can still get a glimpse of that user’s profile by mousing over the institutions, groups and roles numbers displayed.



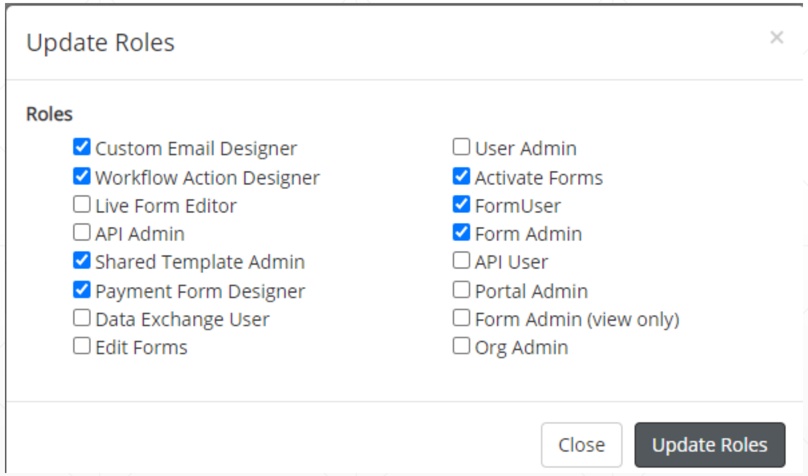
User Admin Screens (continued)

When editing a user, we are now presenting a screen that enables the admin to see all attributes of that user on one screen. The Use Admin can then modify any of the qualities of the user by clicking on the Edit button by the category to be changed.



User Admin Screens – Edit Roles

By clicking the Edit button in the Roles category, Dynamic Forms will pop a box which gives the Admin the ability to check off the roles that are desired for this User. The same functionality exists for the other Categories – Organizations, Groups and the new User Type role we will be discussing later.

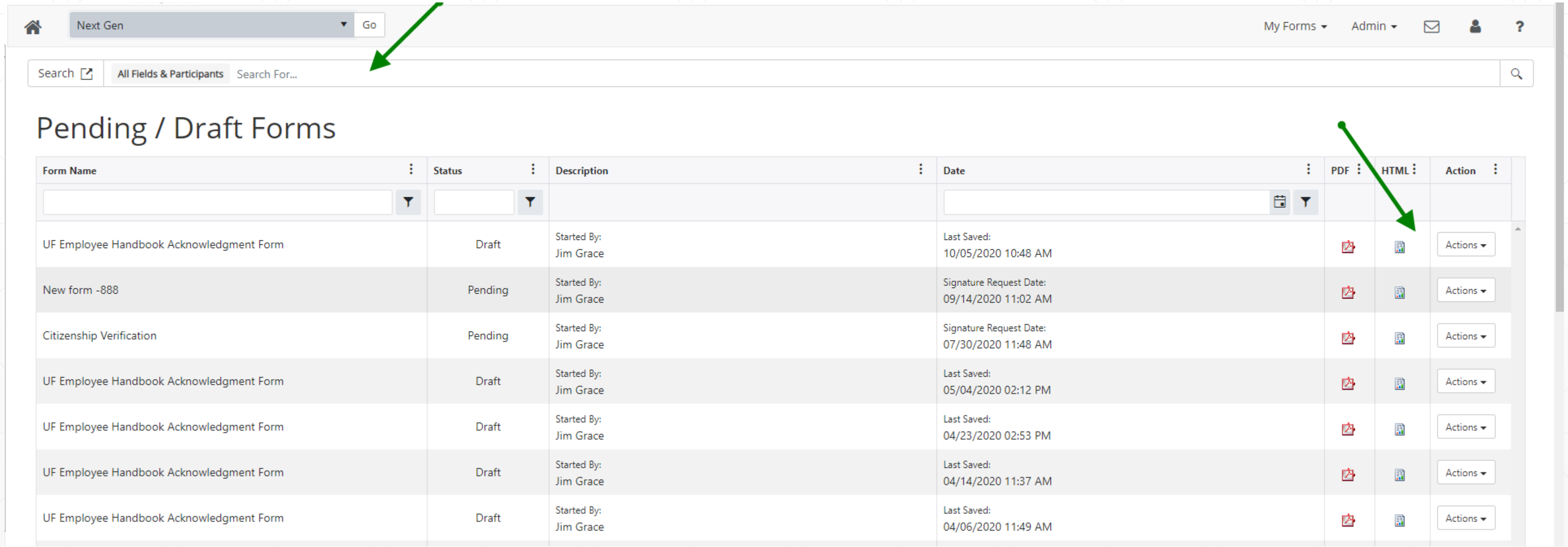


End User Form Screens

New Enhancements

End User Changes – Pending Forms

Existing end users can log into Dynamic Forms and see their Pending/Draft forms along with their forms History. These two screens have also been modified with Search capabilities. This means the user can search all the forms for any value on the form. End Users can now also delete their own draft forms (not drafts in a workflow).



New Features

User Portal

User Portal

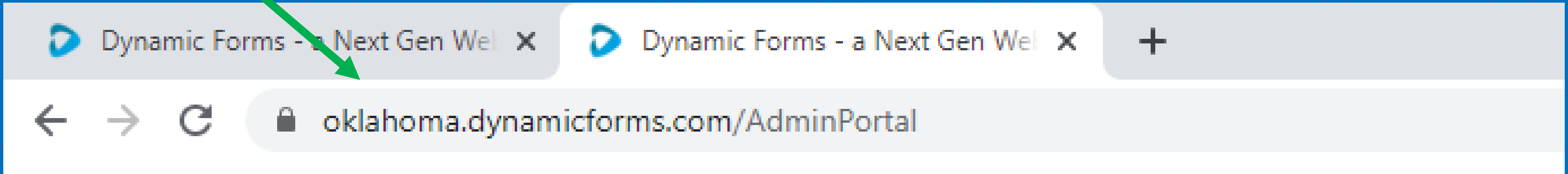
For many years, clients have asked us for a true user portal – an area that users can visit and see forms that applied to them and/or any forms that are available at the college that they might need. With the advances in technology/API we now can provide a portal that is meaningful and useful.

Our new User Portal includes the following functionality:

- Customized URL branding (e.g. myschool.dynamicforms.com)
- Portal Page that includes:
  - Assigned forms – forms that belong individually to the user signing in
  - Active forms – forms the user is currently working on or needs to be
  - Forms history – forms the user has completed already
  - Other forms – forms that the school desires this user to see
- Schools can have multiple portals (Health, Grad, etc.)

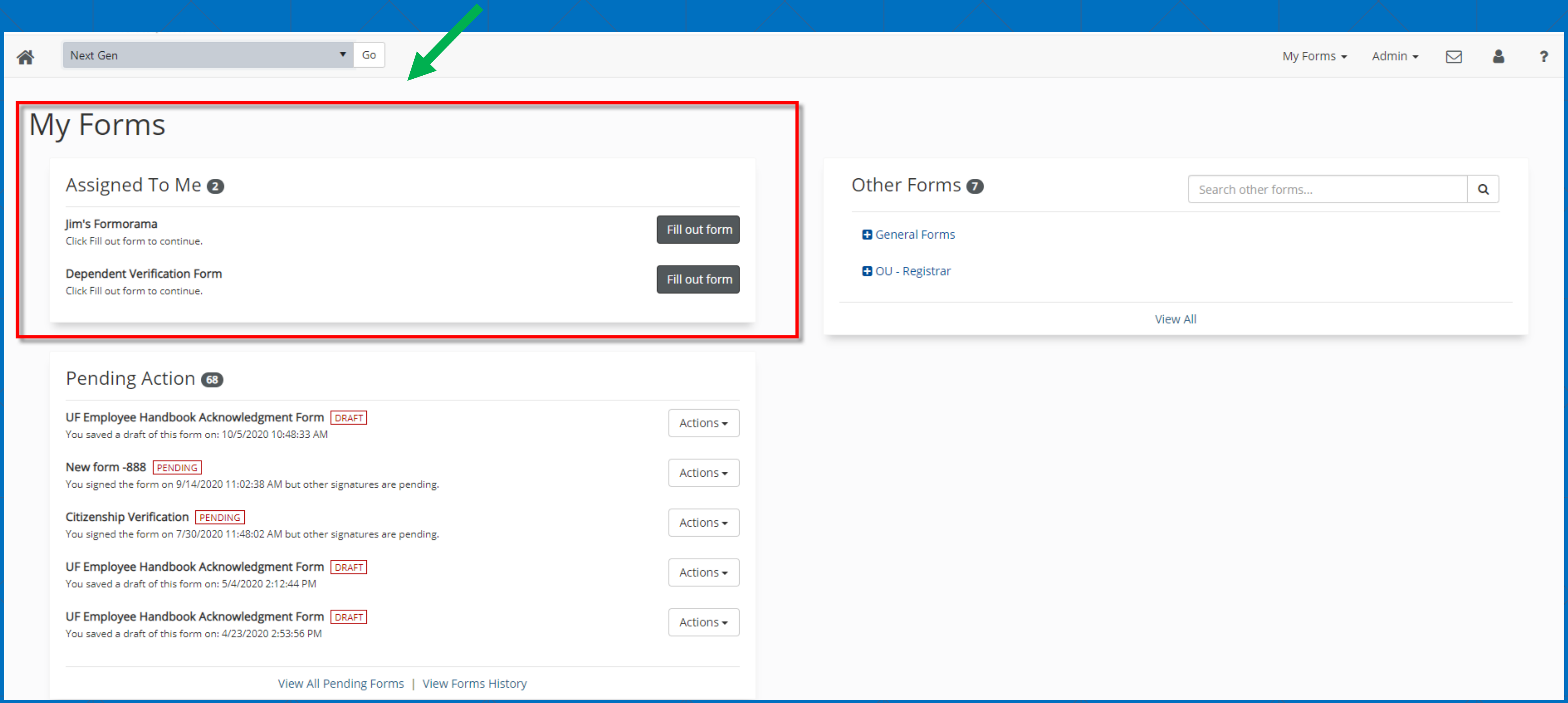
The New Portal – Components

Custom URL – portal clients can define their own URL in front of the our dynamicforms.com domain. In the example below, we took the state of Oklahoma and created a URL for them. This is a great way to direct students to a specific url that has the name of your institution in the url (i.e. – for any forms needs visit ourcollege.dynamicforms.com).



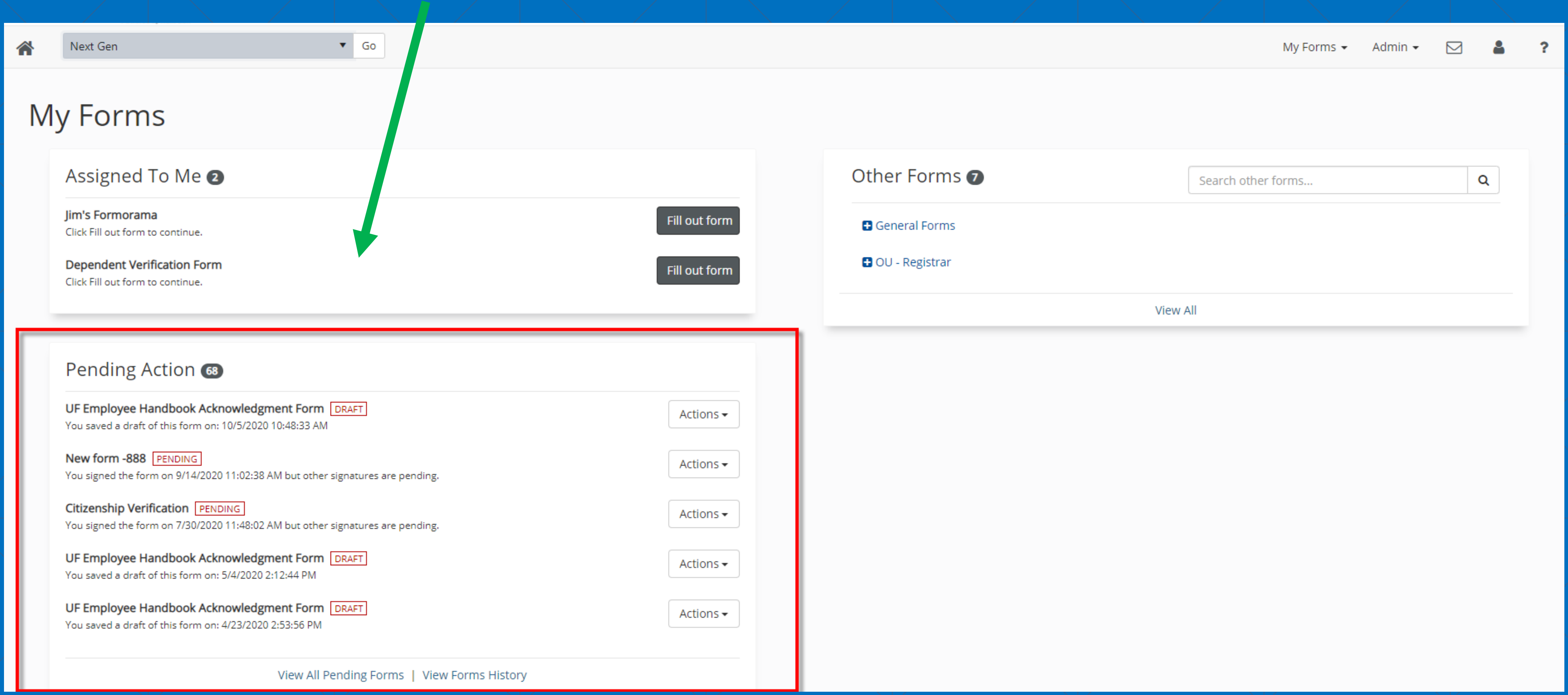
The New Portal – Components

Assigned to Me – is a To Do list for the student that has a forms list that can be populated via API, via batch files or assigned manually by an admin. This list can match your SIS required document lists and update statuses.



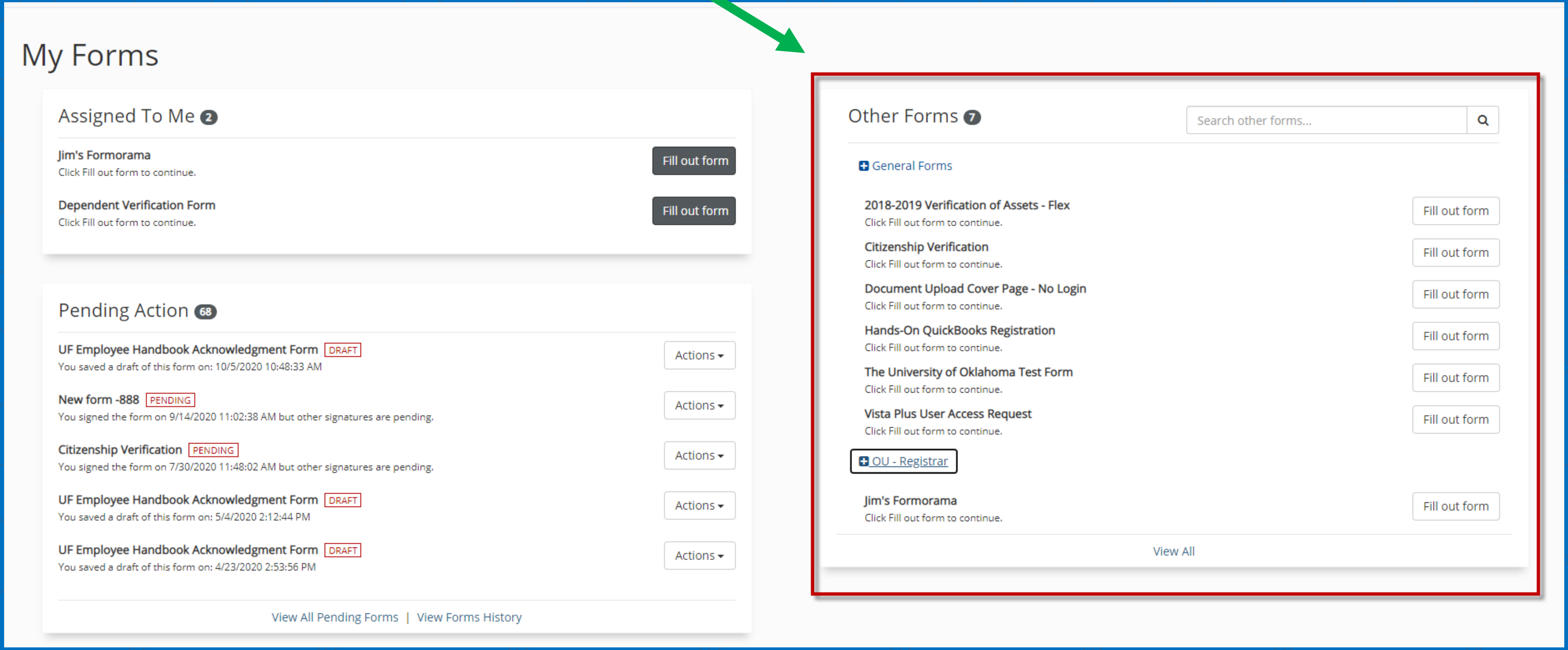
The New Portal – Components

Pending Action– is an area the user can see any forms that are in a draft status or any other type of pending status (awaiting their signature or another person's signature). They can also get to their forms history (complete forms) from here also.



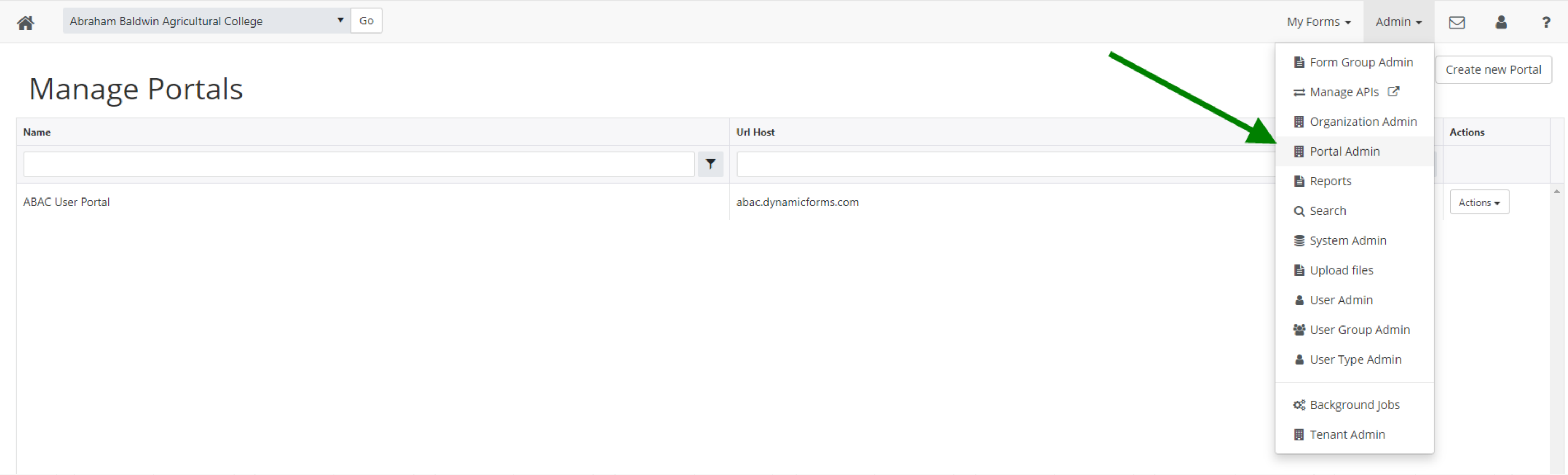
The New Portal – Components

Other Forms– the Portal Manager can place forms in this area to be seen by End User Type. These might be categorized by school department (Registrar, Financial Aid, etc.). These might be able to be seen by students, but not by faculty or parents or other user types.



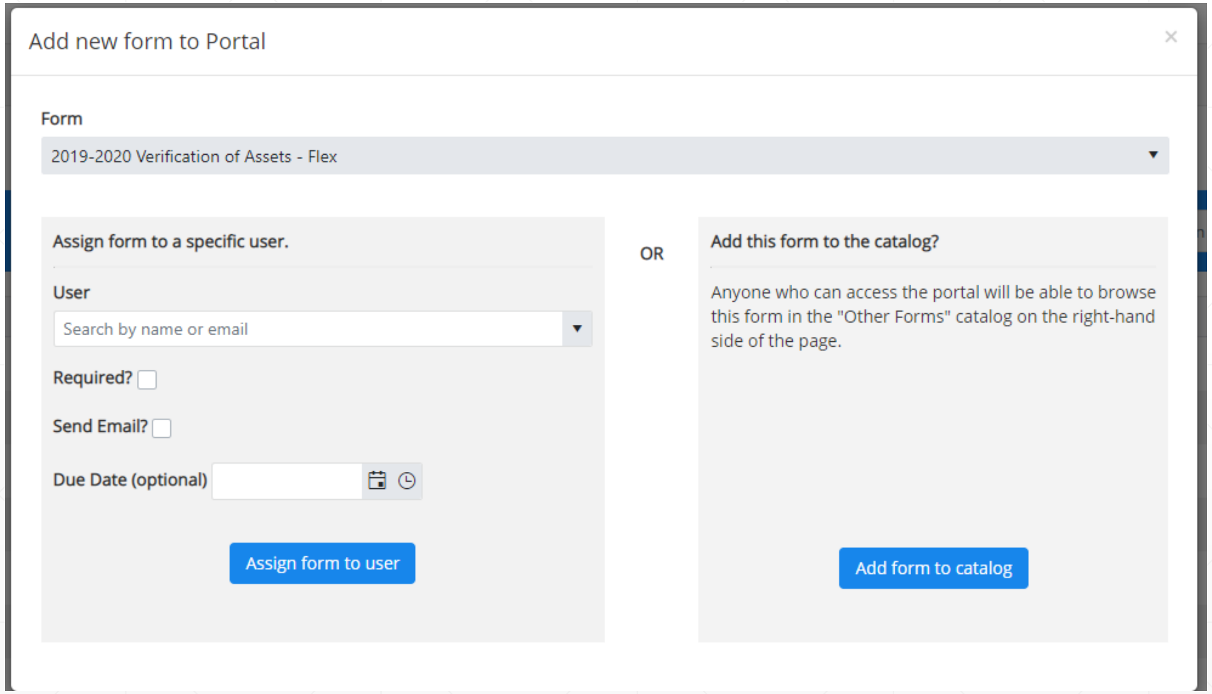
Portal Manager – New role

The college will want to appoint one or more users as a Portal Manager. This user will have the ability to determine the number of portals, which orgs, which forms in those orgs and which user types will be able access the forms on the portal(s).



Add Forms to the Portal

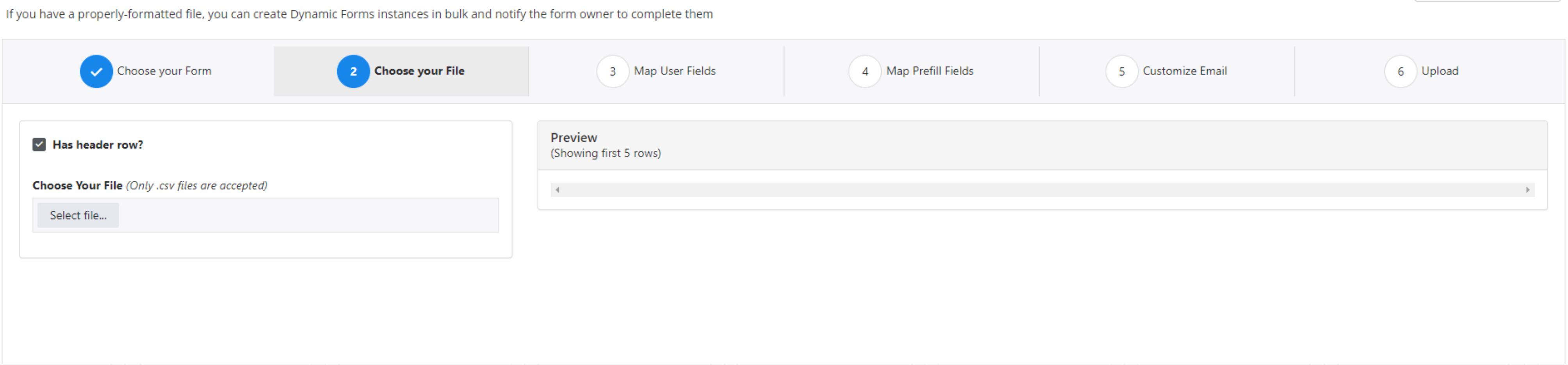
Besides being able to manage the orgs, forms and users that make up the portal, the Portal Manager will also be able to assign forms to specific users (manually, in batch or via API) or add forms to a catalog (the right hand side of the portal)



Assign Forms to Users in Batch

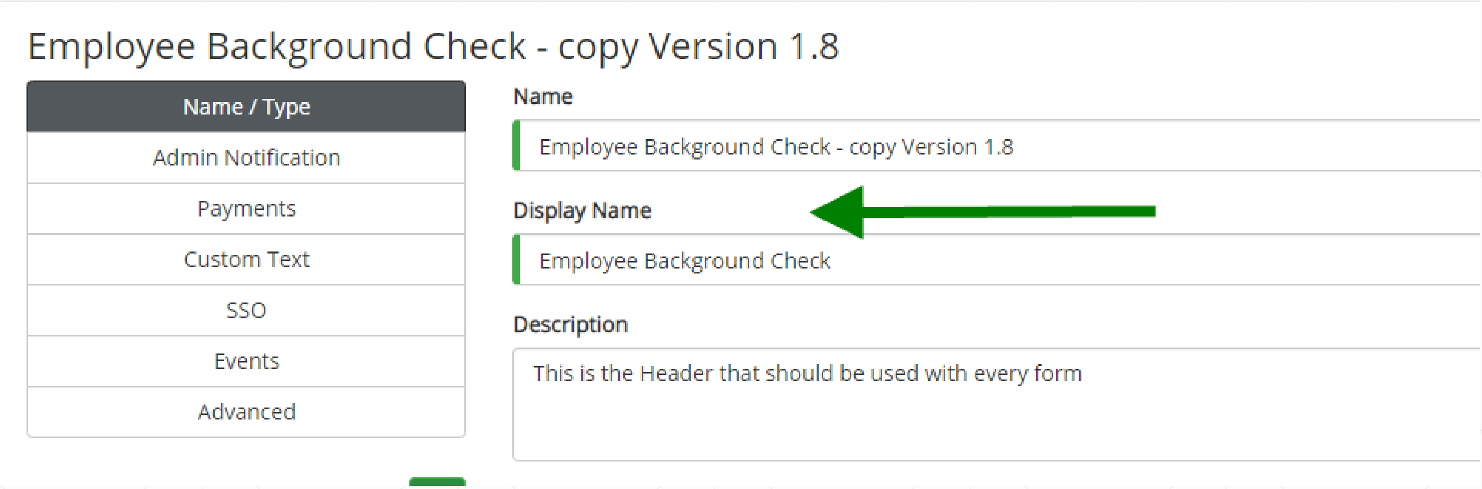
This means that Dynamic Forms will take in a spreadsheet full of users and data and send out a request to those users (if desired) to come in and complete the required forms. The data uploader will be taken through our upload wizard and walked through the process

Users would authenticate and then see the form and any data that was mapped to the form from the file.



Forms Template Changes (related to Portal)

A number of changes will be seen on the Designer Screens if you are a Portal User. We will go over these in the next few screens

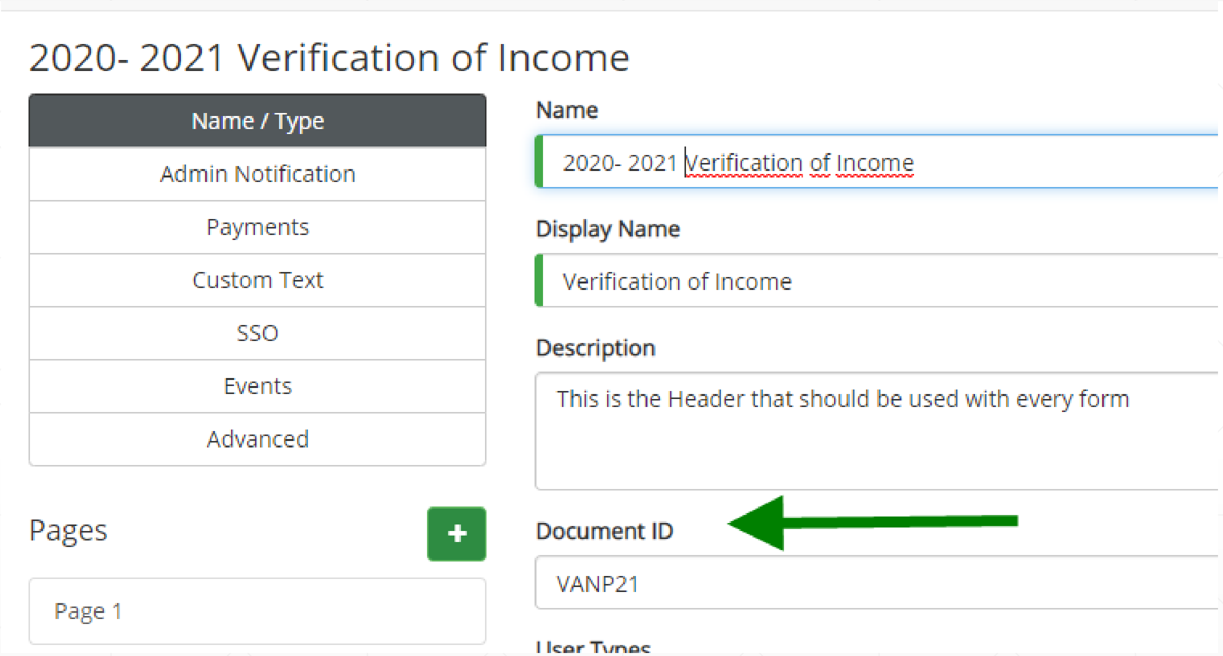


On the Name/Type Page, we have introduced a new value called **Display Name**. This can be used as a new more friendly name to be presented to the user. In the example above, Dynamic Forms shows a name with the extension of ***– copy Version 1.8***
You can use the Display Name to show the user a clearer name of the form.

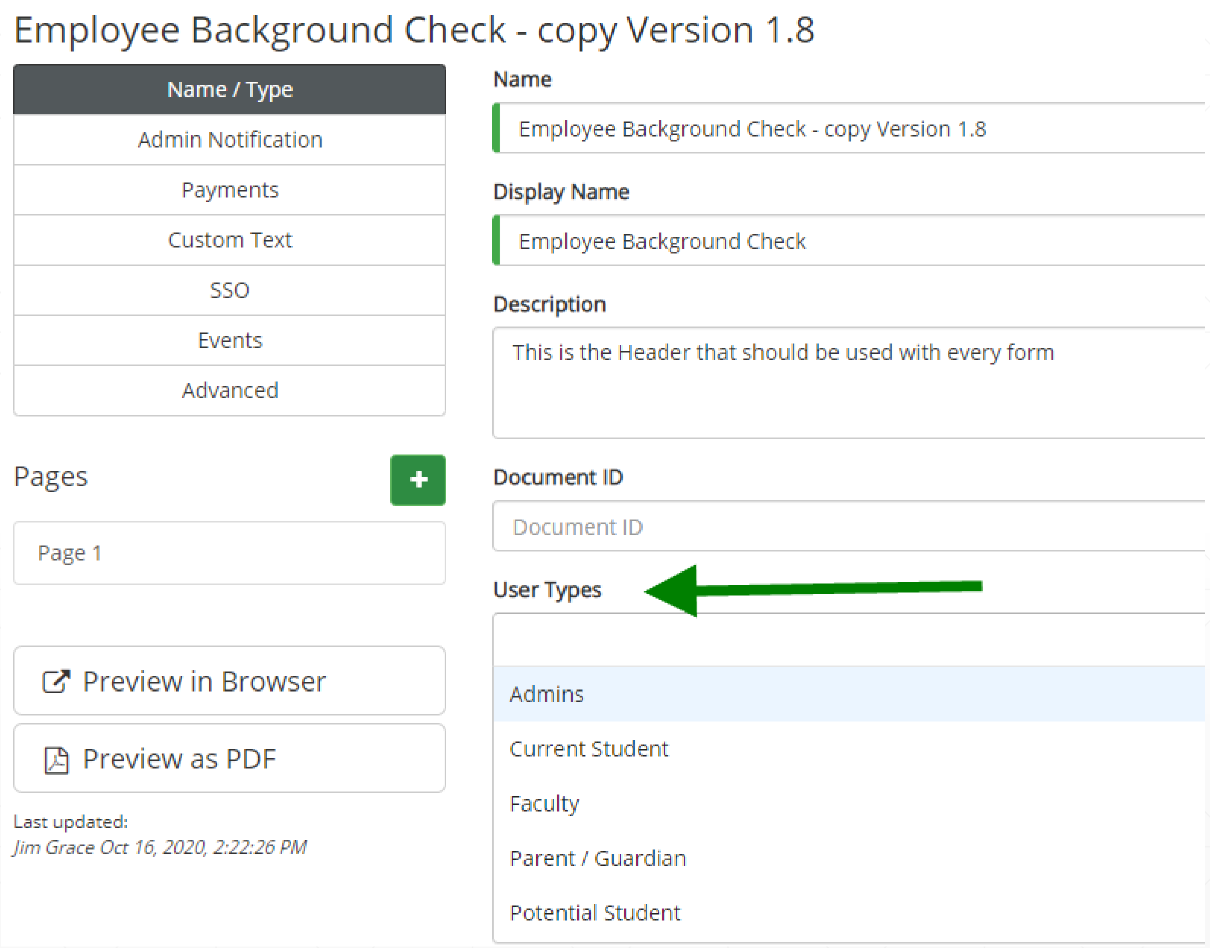
Forms Template Changes (related to Portal)

On the Name/Type Page, we have introduced a new value called **Document ID**. This can be used to better relate this Dynamic Form to your institution's required form and match against this document when updating via API or Batch processing.

In the example here, this year's Verification of Income form is better known in the system as VANP21 and is a requirement for some students.



Forms Template Changes (related to Portal)



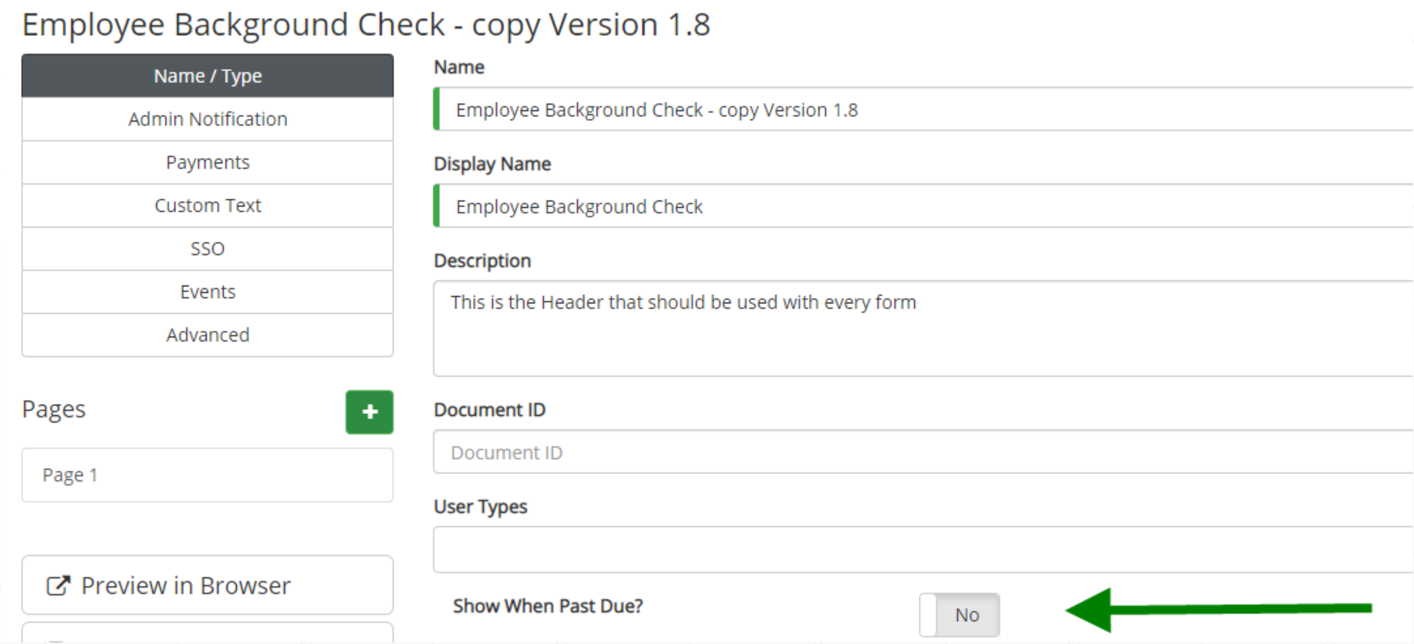
User Types is new concept to Dynamic Forms also. If used, Dynamic Forms can identify the type of user coming over to see and complete forms.

Admins can define User Types in the Use Type Admin screens. User Types are custom to your institution.

At the form level here, designers can define which users are allowed to see and complete this particular form. If left blank, all users will be able to see and complete the form.

Forms Template Changes (related to Portal)

Another new item is the **Show When Past Due** field. On the portal, Admins can define a due date related to the form assigned to that specific user. This field will determine whether or not the assigned form can be seen after the due date attached to the form.



Introducing - Invitations

What are invitations?

Invitations are a new concept in Dynamic Forms. In this flow, the Admin or a trigger from an API can invite users (via email and soon SMS) to complete forms.

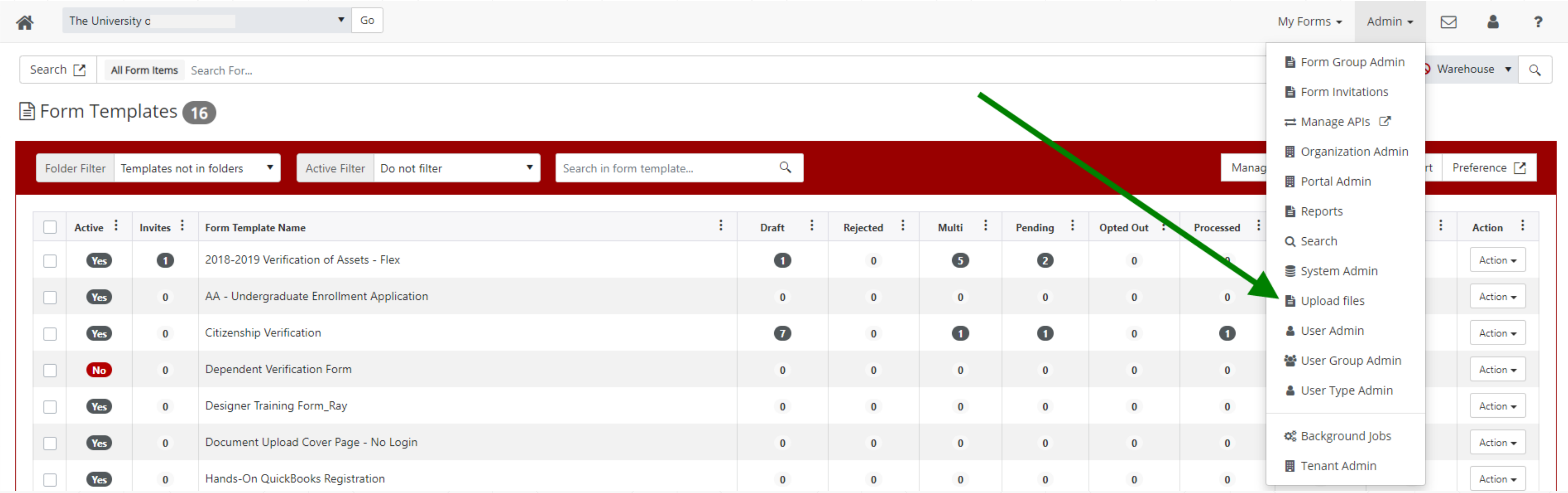
For example, if the college had 50 faculty members who were required to sign a confidentiality form, Admins will be able to upload a file of those 50 faculty members, along with any information they would like to prefill into the form template and then email invitations to those 50 faculty members to complete their respective form.

Faculty members would be able to click into the invitation (sign in if necessary) and then complete the form which might include some prefilled data for them.

The Admin will be able to track the uploaded 50 faculty members, see which faculty members started the form and which might need an additional push.

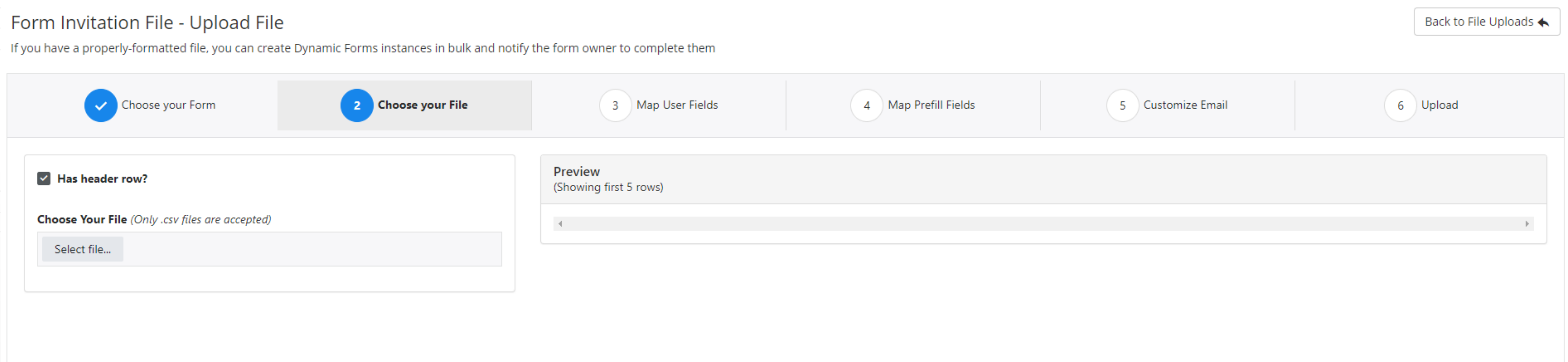
Invitations via File Upload

Admins (with permissions) will have a new option from the Admin menu from the Homepage – Upload Files This will allow admins to initiate sending a group of people an invitation to complete a form.



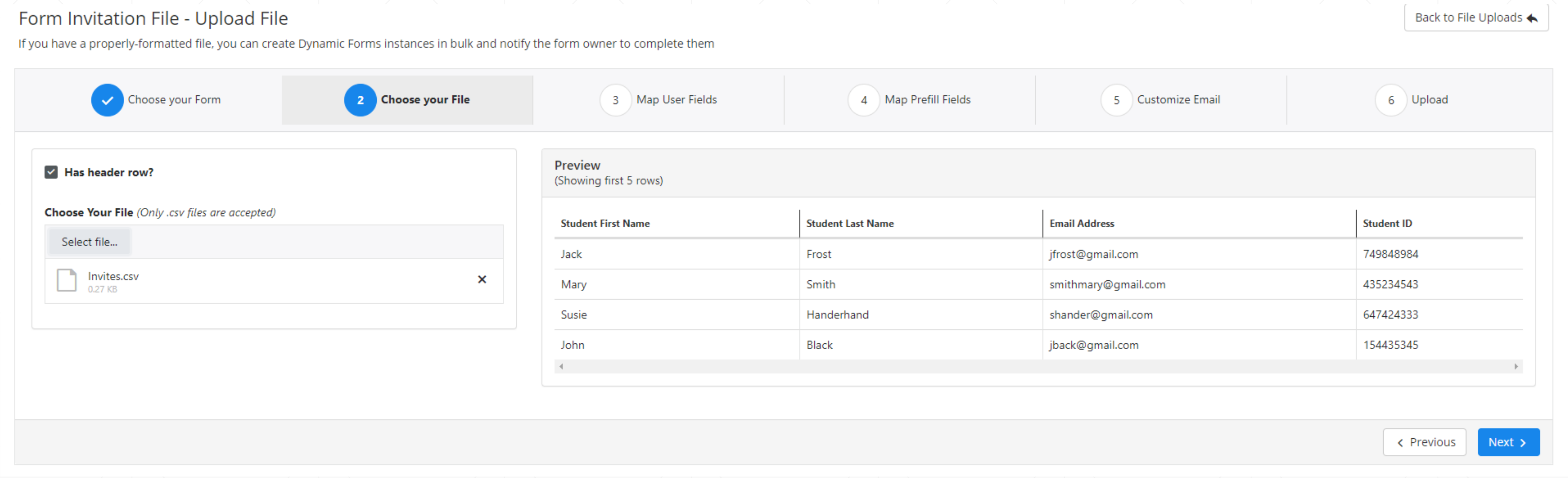
Invitations via File Upload

After selecting the option to upload a new file, the Admin will be taken through a Wizard where they are able to select the form template, select the file to be used and then select the fields to be mapped to enable prefilling the form template.



Invitations via File Upload

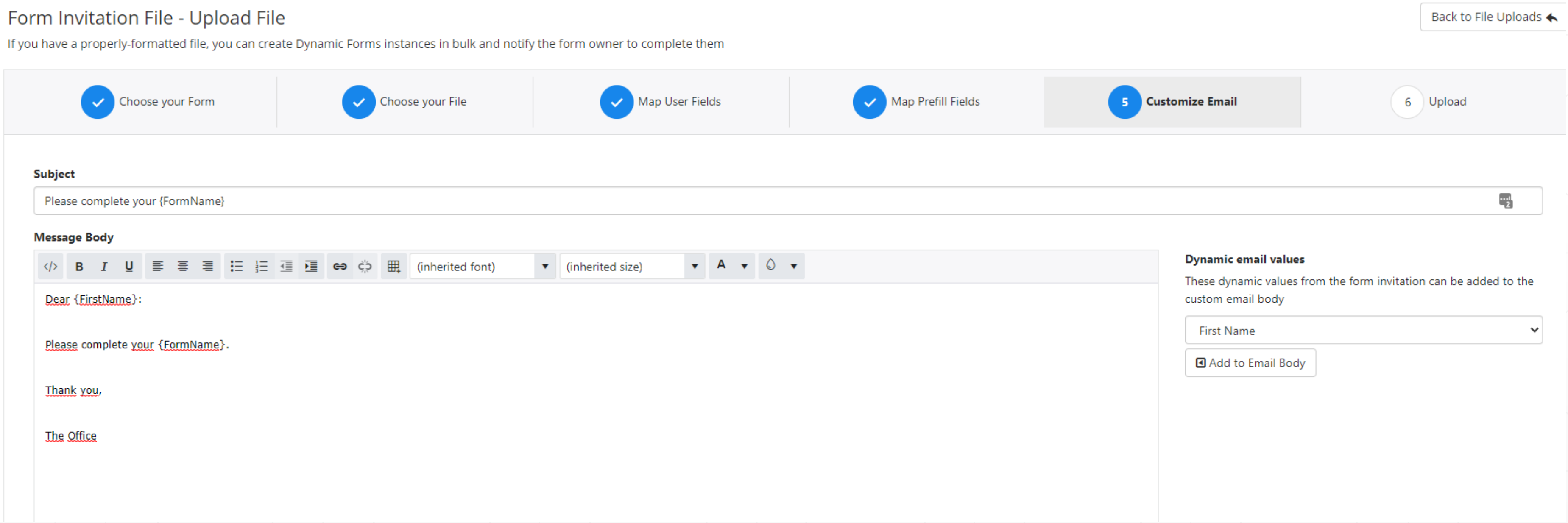
Admins will be able to identify to whom the invitation will be emailed to and be presented with a file mapper that enables them to pick the fields on the uploaded file and map them to individual fields on the form template.



Student First Name	Student Last Name	Email Address	Student ID
Jack	Frost	jfrost@gmail.com	749848984
Mary	Smith	smithmary@gmail.com	435234543
Susie	Handerhand	shander@gmail.com	647424333
John	Black	jback@gmail.com	154435345

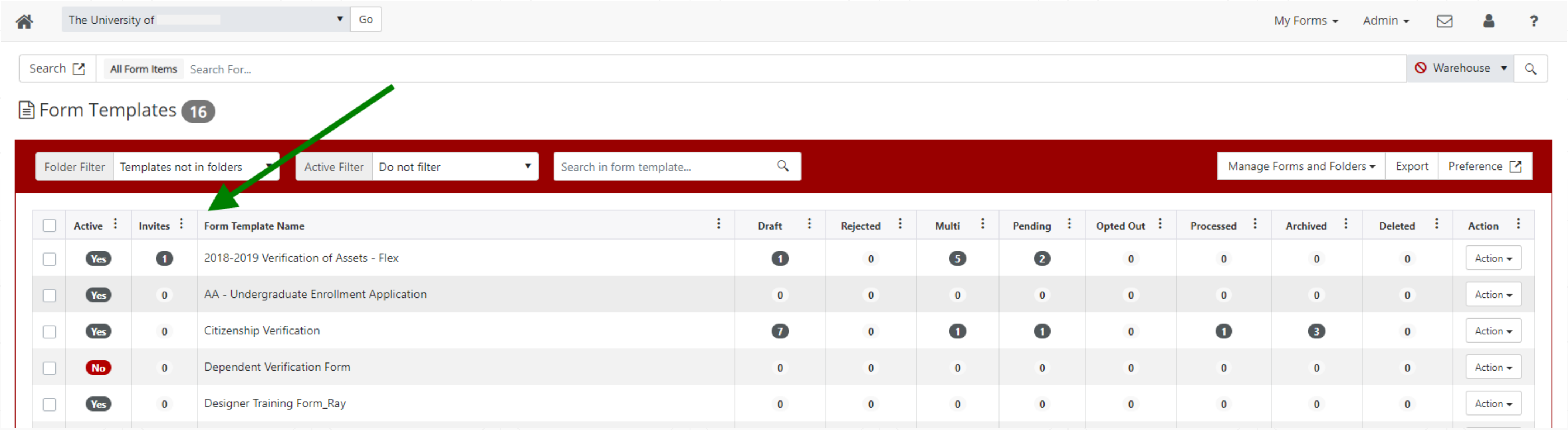
Invitations via File Upload

If that was not enough, Dynamic Forms will enable you do customize all form invitations emails that go out to the file list.   After this, you can send away or schedule when Dynamic Forms should send the email. Then all customized form invitations are headed out to your end users.



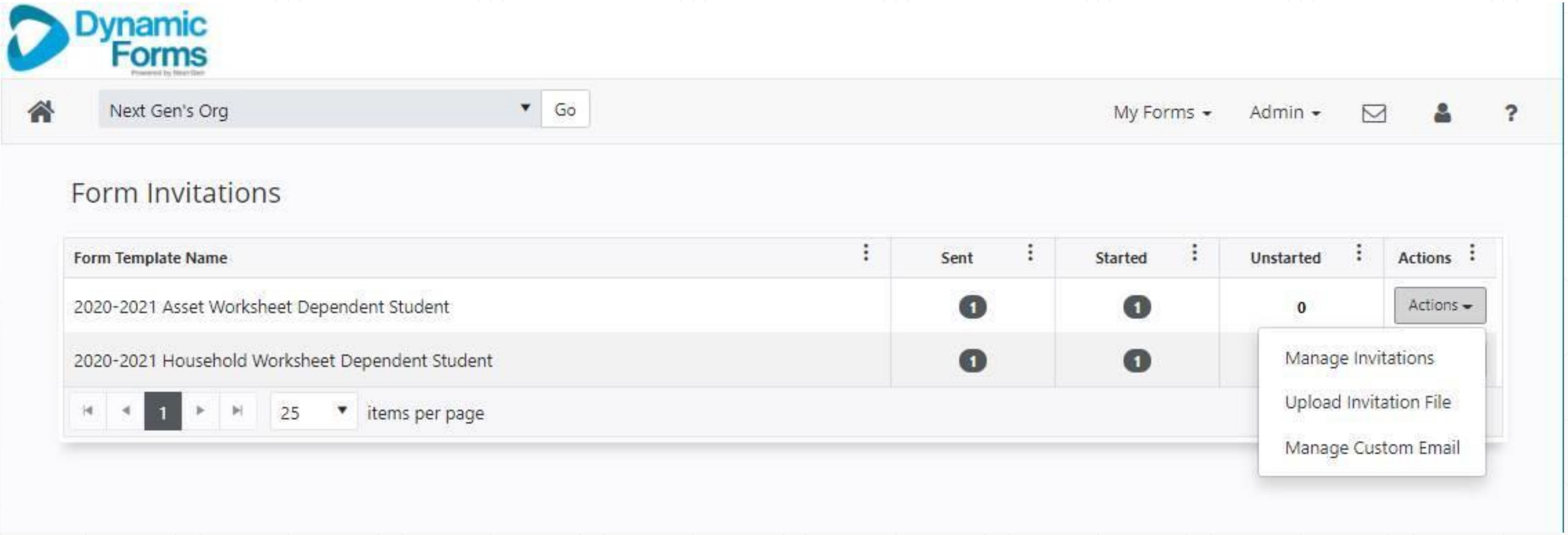
Invitations on the Homepage

For form templates that have invitations associated with them, a new column will appear on the Homepage left of the form template name. We have separated the invitations from the forms as invitations are not yet forms.



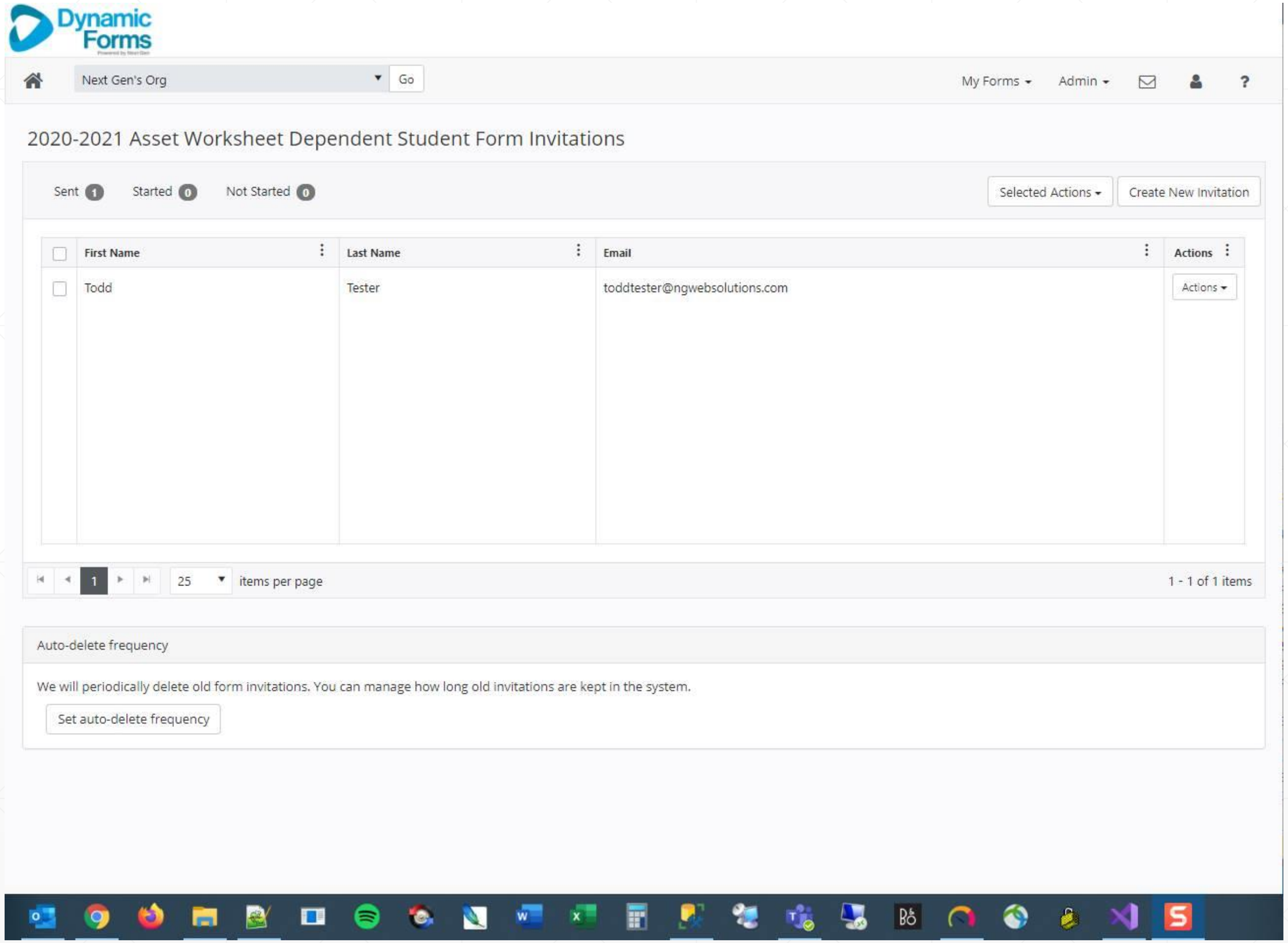
Invitations via File Upload

Admins will be able to seen and manage Invitations on a new Form Invitations page. This page will enable them to track which invitations have been sent for which form templates, and at the totals level – see the number of end users who have forms started and see how many might need an additional push.



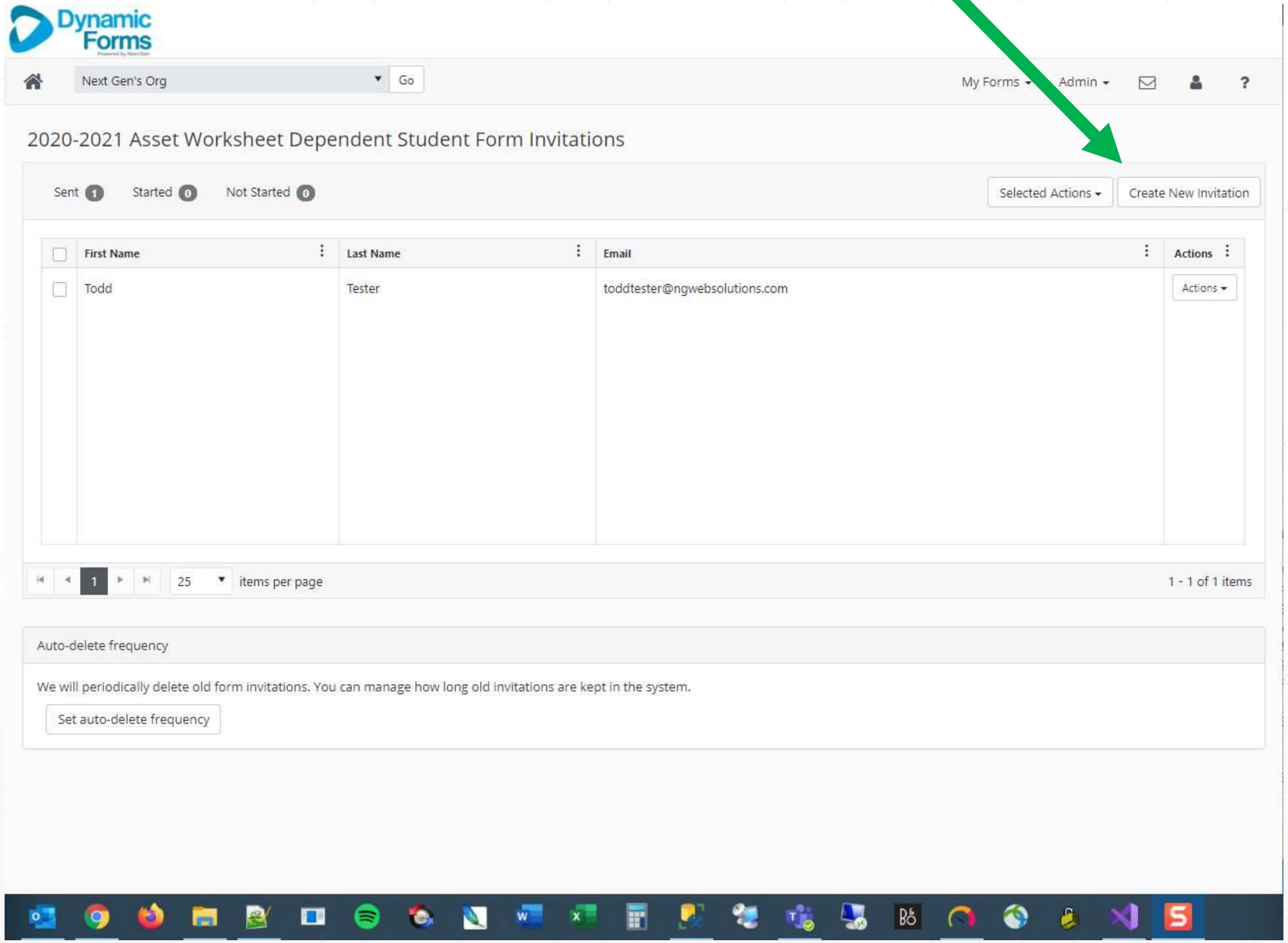
Invitations via File Upload

Diving down deeper, Admins will be able to look individually at specific users who have been sent invitations and resend or delete those invitations.



Invitations via Manual Intervention

Admins will also be able to create invitations individually to end users by clicking on the Create new invitations button both on this screen and on the main Invitations screen.



Invitations via an API

A new trigger has been created in Dynamic Forms that will enable an API Admin to establish an invitation to be emailed based on an event outside of Dynamic Forms but is then communicated to Dynamic Forms.

For example, let's say a new employee is extended a hire offer at the college and that event in Banner or PeopleSoft kicks off a trigger to Dynamic Forms to email an invitation for the new employee to complete the following forms:

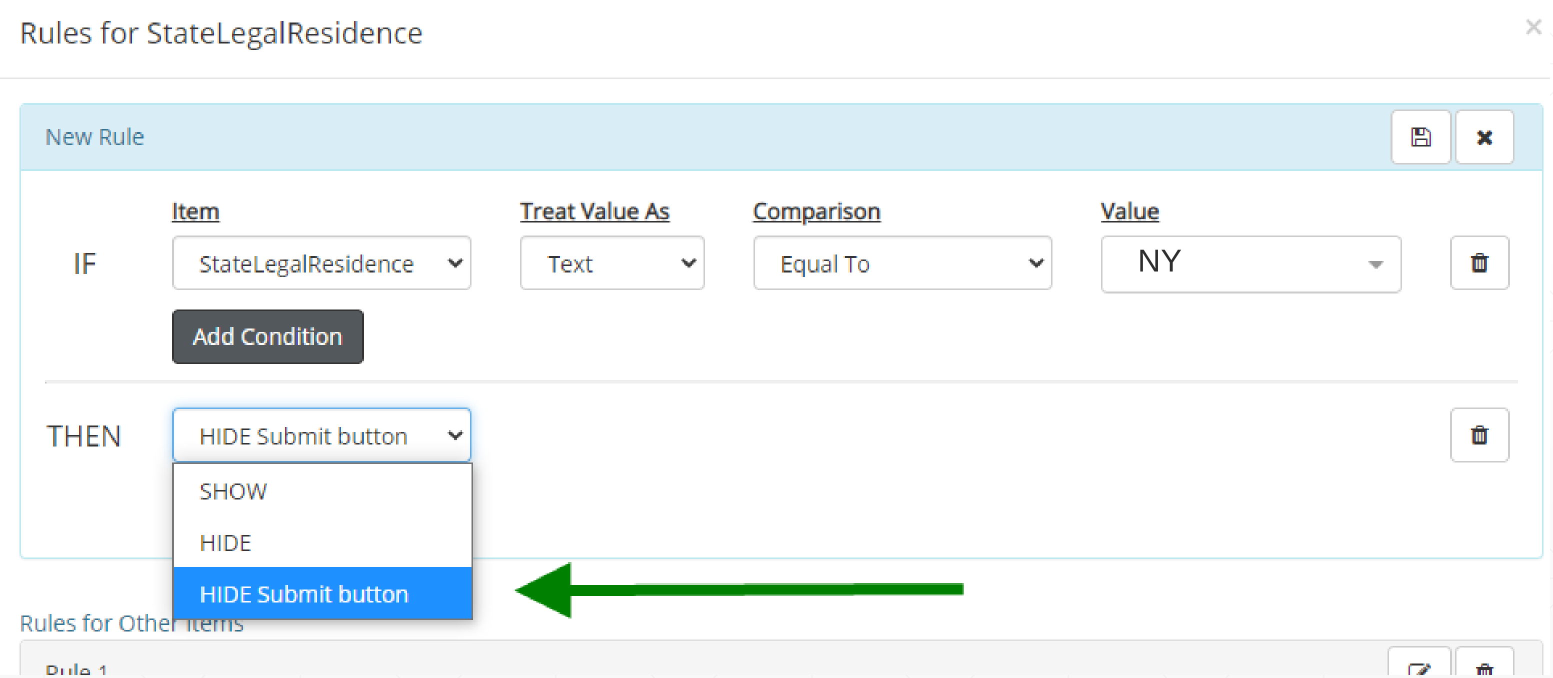
- W-4
- New Hire Worksheet
- Background check form
- Employee Handbook agreement

That trigger can now be built into Dynamic Forms to invite that new potential employee to complete the hiring package of forms. Schools can also take advantage of our new Forms Groups process that will track when all four forms are collected.

Other Important Enhancements

New Option – Hide submit button (End Form)

This new rule option allows you to hide the submit button for the user based on a certain condition. For example, if the user selects that they are from out of state then the form should not be submitted. **You should use this rule in addition to a conditional message to the user that they do not qualify and to close the browser.**

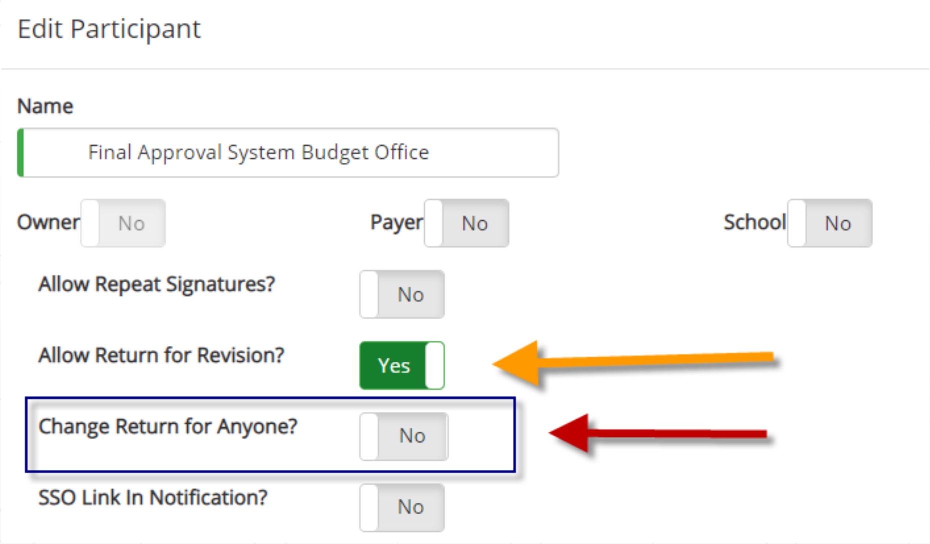


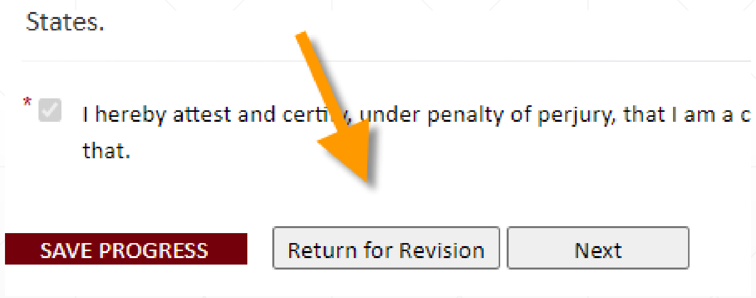
Return form back to more than one participant

Based on popular demand, we have added functionality to return (old reject) the form back more than one participant. If return is permitted for the user, that user can select the participant who to return the form to.

The first step is to allow returns at the participant profile. The new step is to also select “Change Return for Anyone?”

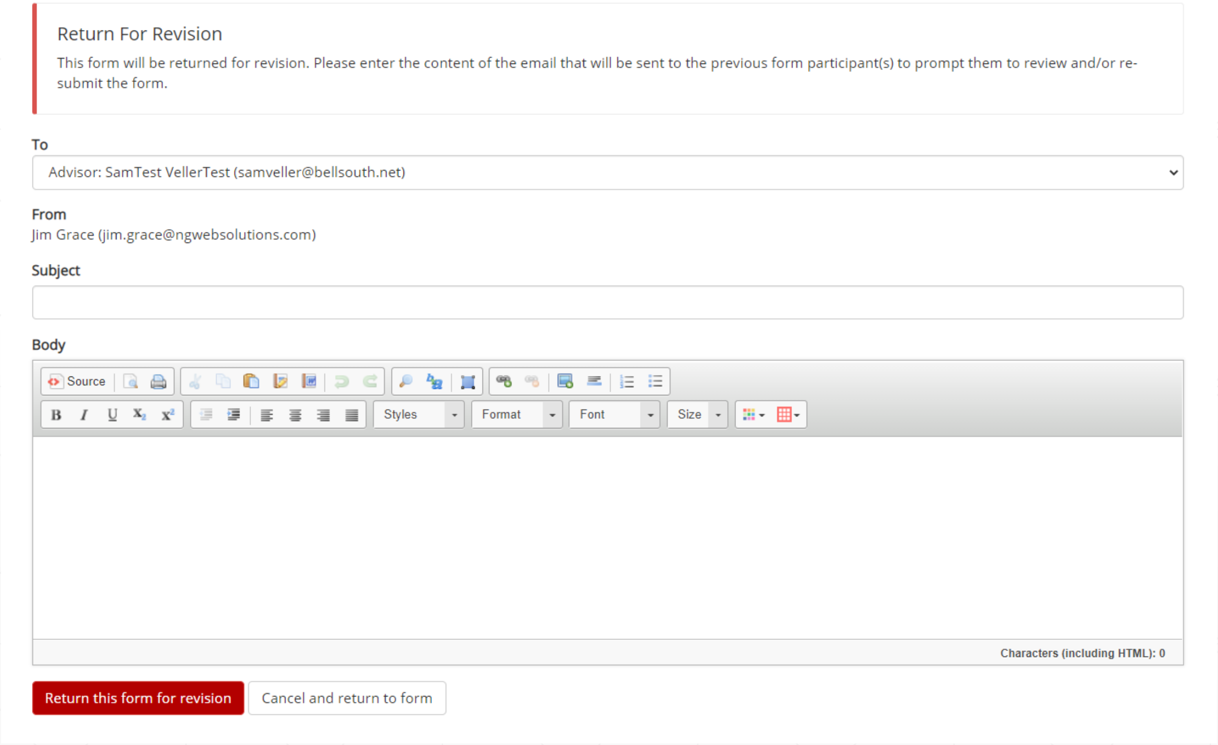
This enables the Return for Revision option for the participant.





Return form back to more than one participant

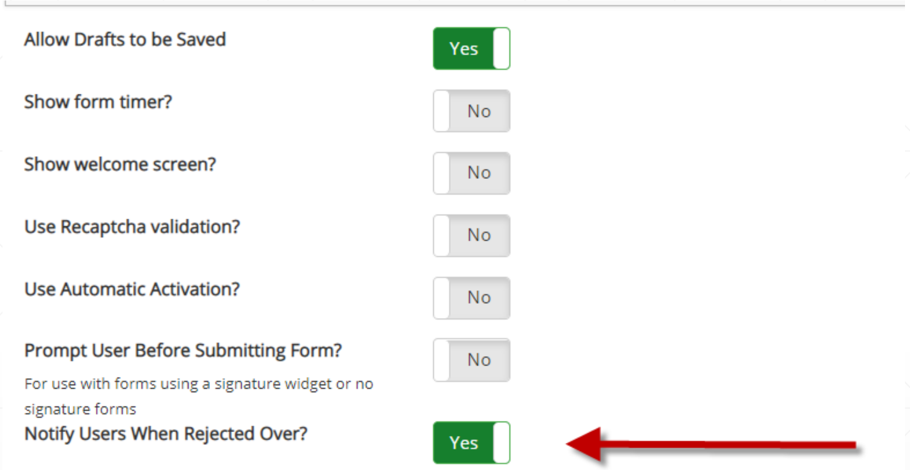
With the “Change Return for Anyone?” option selected; the participant now has the opportunity to select any other participant to return to by selecting that participant in the dropdown list shown below.



As before, the Returner can customize the email back to the person who they are returning the form to.

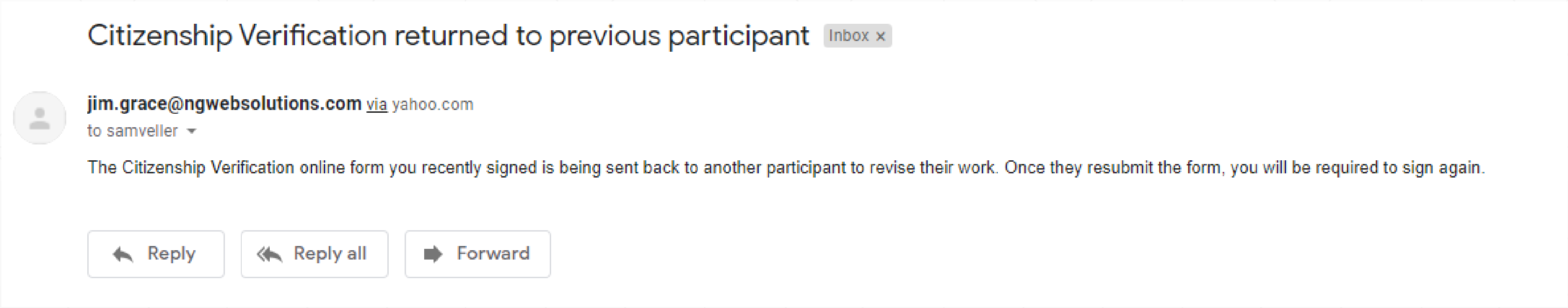
Return form back to more than one participant

If you wish to send an email to participants who have previously signed the form to alert them that the form has been returned, you can select this option on the Name/Type section in the Forms Designer.



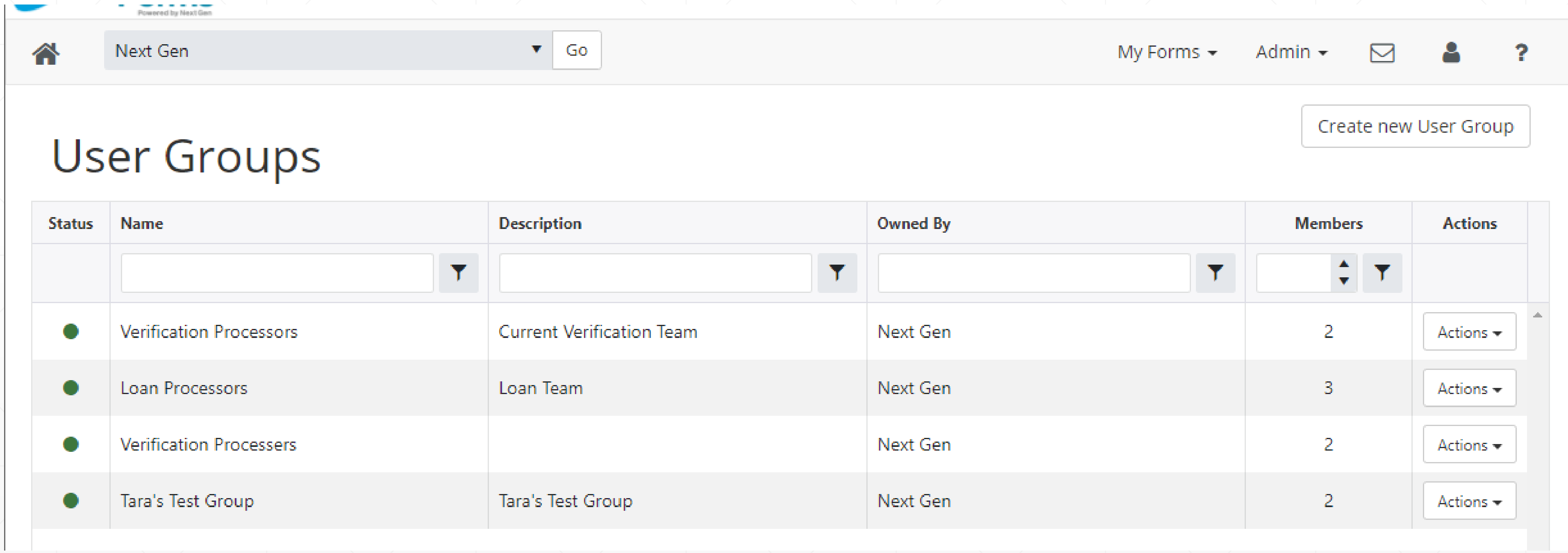
When clicked to Yes, all participants who have previously signed the form will receive an email notification that the form has been returned.

If you leave to the default of ‘No’, the participants will not be notified of the return.



Groups – Enhanced Security

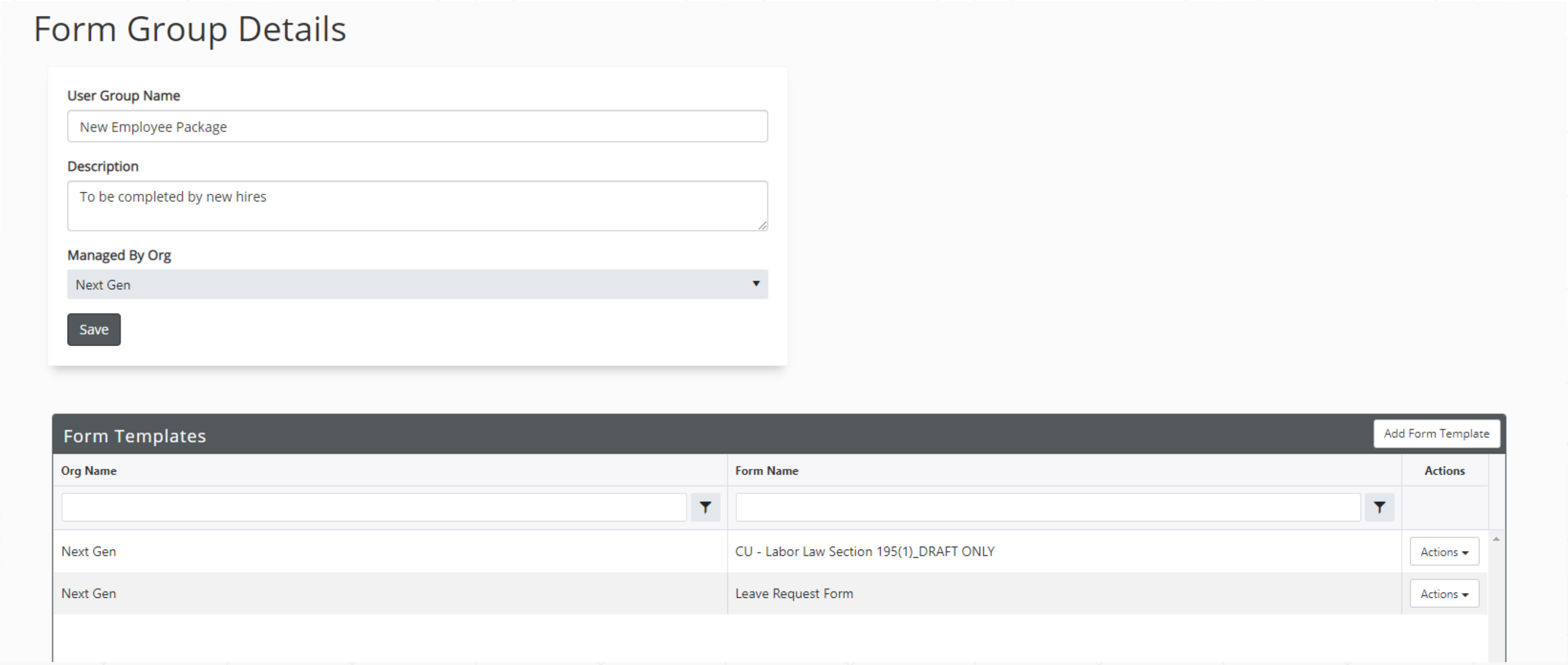
User Groups were introduced last year, and they have become very popular. One of the drawbacks on the use of User Groups was that they could be edited by organizations other than the organizations that originally created the group.   With this release, User Groups are only able to be modified by the organization that created the group.



Status	Name	Description	Owned By	Members	Actions
	Verification Processors	Current Verification Team	Next Gen	2	Actions
	Loan Processors	Loan Team	Next Gen	3	Actions
	Verification Processers		Next Gen	2	Actions
	Tara's Test Group	Tara's Test Group	Next Gen	2	Actions

Introducing – Form Groups

This new rule option allows you to hide the submit button for the user based on a certain condition.   For example, if the user selects that they are from out of state then the form should not be submitted.   You can use this rule in addition to a conditional message to the user that they do not qualify and to close the browser.



Introducing – Form Groups - Reporting

Administrators will be able to pull a completed Forms Group report

Forms Group completed by Date – most recent.

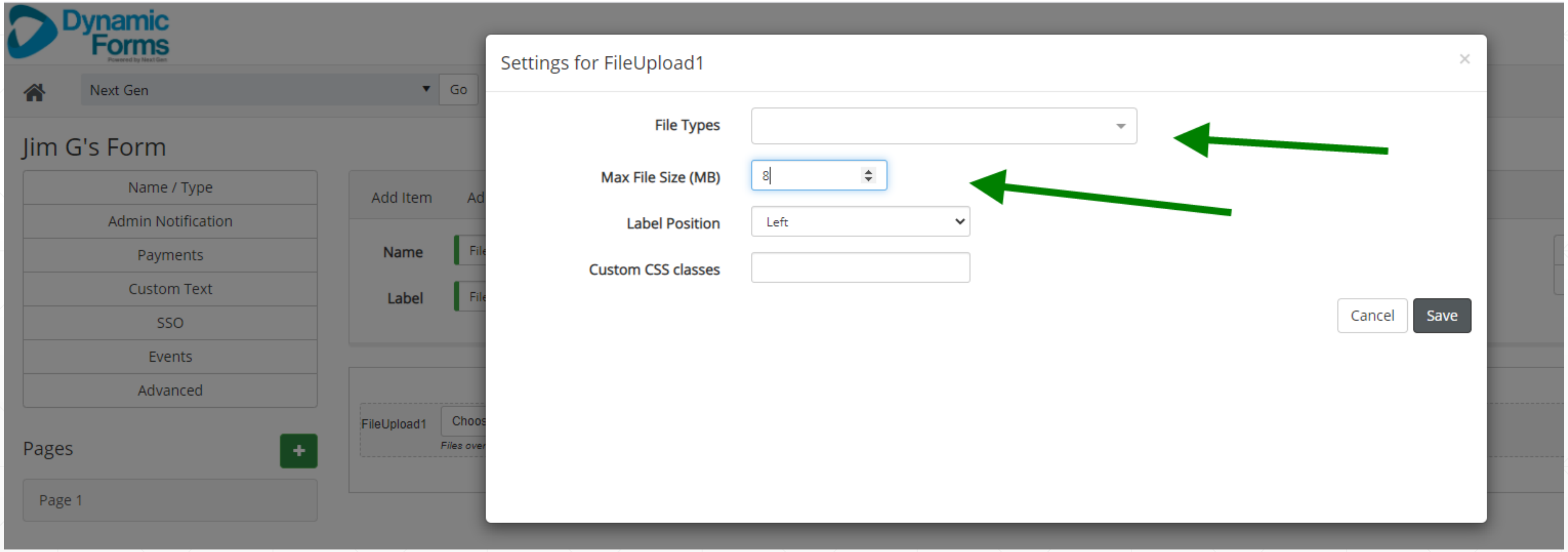
Forms Report

forminstance_id	Unique Id	Org Name	Form Name	Form Status Name	Created Date	Submit Date	Esign Date
15055553	faac8c4d-7ff3-486b-9c5b-2712c4d6fc73		2016-2017 Dependent Verification Form	Rejected	Sun May 01 2016 00:01:03 GMT-0400 (Eastern Daylight Time)	Mon Jan 01 1753 00:00:00 GMT-0456 (Eastern Standard Time)	Mon Jan 01 1753 00:00:00 GMT-0456 (Eastern Standard Time)
15055558	c9d3fc91-a685-4c26-9053-d6430795c91e		2016-2017 Title IV Authorization, Consent and Disclosures Form (Dependent) v1	Processed	Sun May 01 2016 00:02:56 GMT-0400 (Eastern Daylight Time)	Sun May 01 2016 00:07:39 GMT-0400 (Eastern Daylight Time)	Sun May 01 2016 00:07:39 GMT-0400 (Eastern Daylight Time)
15055559	f4c74611-6cb8-4ab4-bcc5-df36868ea9a1		2016-2017 Verification Worksheet - Dependent	Deleted	Sun May 01 2016 00:02:57 GMT-0400 (Eastern Daylight Time)	Sun May 01 2016 00:09:06 GMT-0400 (Eastern Daylight Time)	Sun May 01 2016 00:09:06 GMT-0400 (Eastern Daylight Time)
15055565	f3d8cbaa-9503-4222-a561-0e2d803d1acd		Academic Warning Certification Statement	Processed	Sun May 01 2016 00:04:13 GMT-0400 (Eastern Daylight Time)	Sun May 01 2016 00:05:22 GMT-0400 (Eastern Daylight Time)	Sun May 01 2016 00:05:22 GMT-0400 (Eastern Daylight Time)
15055568	238299f6-0a3c-4fb5-83b1-4bd7deec46ee		Summer Financial Aid Review Request 2016	Processed	Sun May 01 2016 00:06:06 GMT-0400 (Eastern Daylight Time)	Sun May 01 2016 00:07:40 GMT-0400 (Eastern Daylight Time)	Sun May 01 2016 00:07:40 GMT-0400 (Eastern Daylight Time)
15055569	f880affd-9420-46b8-ad6e-0064f552bbf4		2016-2017 Title IV Authorization, Consent and Disclosures Form (Dependent) v1	Processed	Sun May 01 2016 00:06:36 GMT-0400 (Eastern Daylight Time)	Sun May 01 2016 00:14:46 GMT-0400 (Eastern Daylight Time)	Sun May 01 2016 00:14:46 GMT-0400 (Eastern Daylight Time)

File upload Enhancements – limits on size and type

Form designers will now be able to limit both:

- Max File Size – this can be anywhere from 0 to 25 Meg
- File User Types - ??



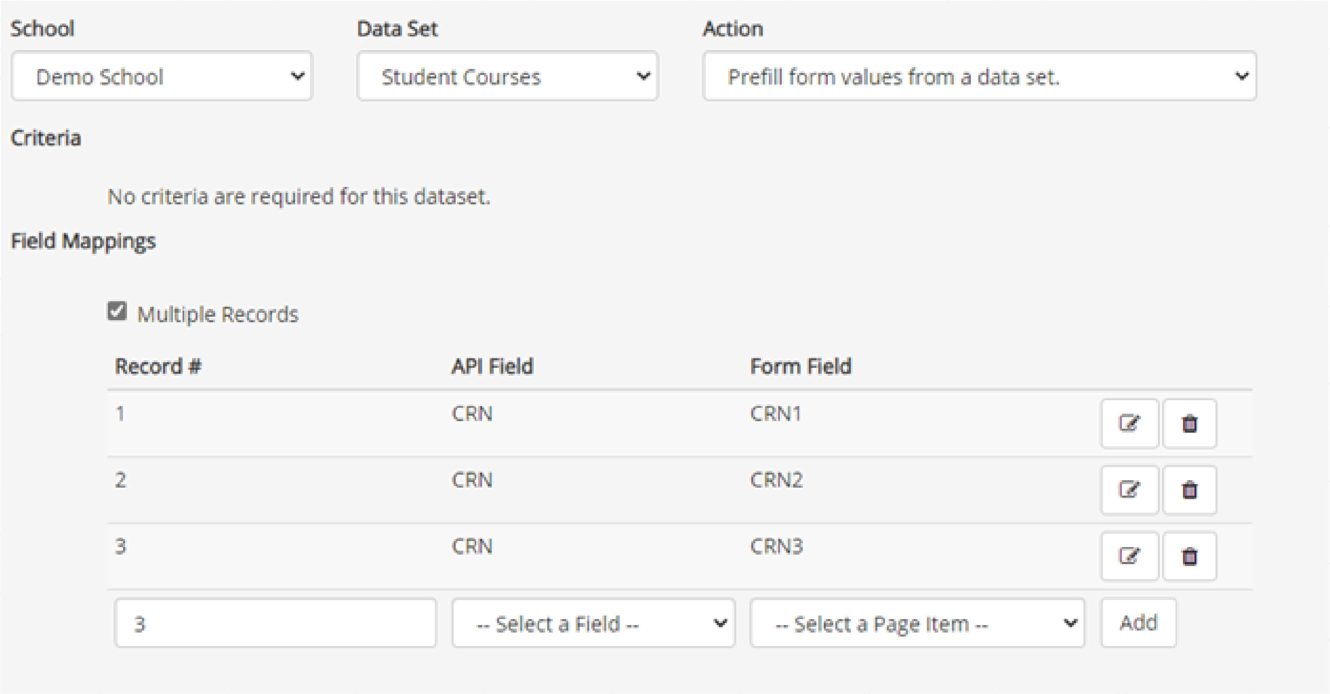
Forms now Autosaved

With the new infrastructure, all forms are automatically saved after any input field is changed.

No wonderful picture – just the new functionality!

New API Functionality – Multiple Rows

In the past when trying to create a table of values with multiple rows (e.g. Class Schedule) we batched together solutions for you. Now, with the “Multiple Records” option shown below, API Admin users are able to send a single response with multiple rows and map them within the API designer.



New API Functionality – Eliminate Vulnerability

Appalachian State University helped us identify a potential vulnerability within the API Admin Interface. After verifying the issue, we coded a solution to eliminate the issue. Here are the details.

There were two aspects to the vulnerability:

- Dataset details (including connection and authentication details) could be discovered by "enumerating" parameters in a url.
  - Users would need to have Dynamic Forms access and more importantly would need to have the role of APIAdmin
  - Example: https://api.ngwebsolutions.com/api/datasets/87?schoolid=22 – by changing the highlighted values and getting the correct combinations, another school's datasets could be retrieved

    This has been modified to hide all visible values: Example: https://api.ngwebsolutions.com/admin#/72440c4c-27de-4338-9810-72XXXXXXXXXX
  - Using the retrieved dataset details, API calls could potentially be initiated that could return data from the target school's system.
  - If the target school had implemented IP whitelisting (which all school do) to limit calls to only Next Gen API servers there is no risk here.
  - The potential for exposure is extremely low as due to all the factors above and specific data inputs would be needed to get any data through the API.
- The other scenario is that if a rogue Dynamic Forms API Admin provided this information to a user outside of Dynamic Forms they could possibly see datasets.

  All of the same potential risks and limitations as the first scenario apply with this.

New Email Server – SendGrid

Next Gen has entered into a new relationship with SendGrid/Twilio that will enable us to further build out our communications platform for the Dynamic Forms product. Here are the items related to the what this release has and what we will be doing in the future:

Release 9 Enhancements:

- Move away from Next Gen sending emails to a more reliable, robust email provider
- No charge for these email improvements
- Clients will need to modify email settings to use these new features
- Better reporting on the success of email delivery
- Choice to also send emails via your college email system

New Email Server – SendGrid

Future Enhancements:

- Texting – options for colleges
- Communications Options for Admins and End Users

Thank you for supporting our team!