

# Dynamic Forms

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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](https://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

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December 8, 2020 Release Date

# Admin Home Page

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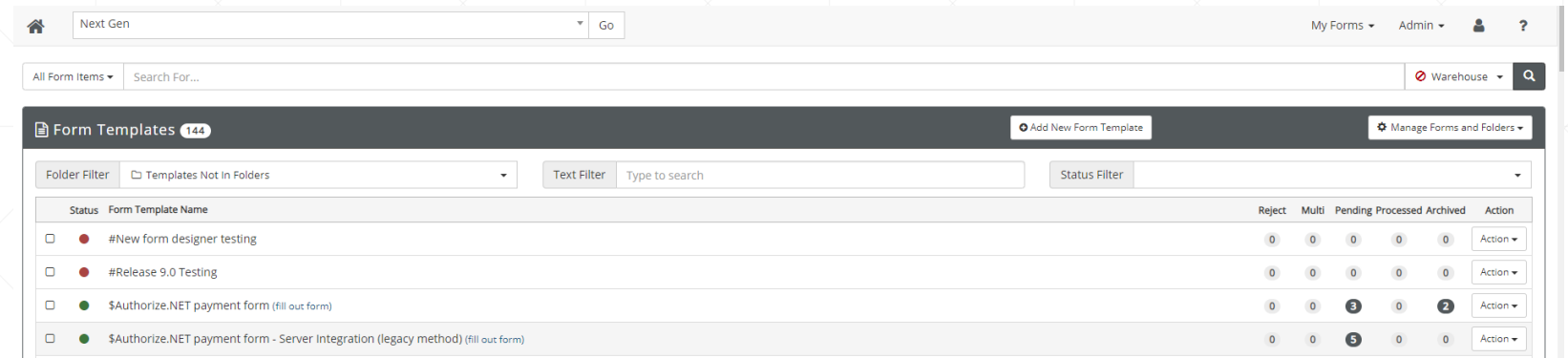
New Enhancements



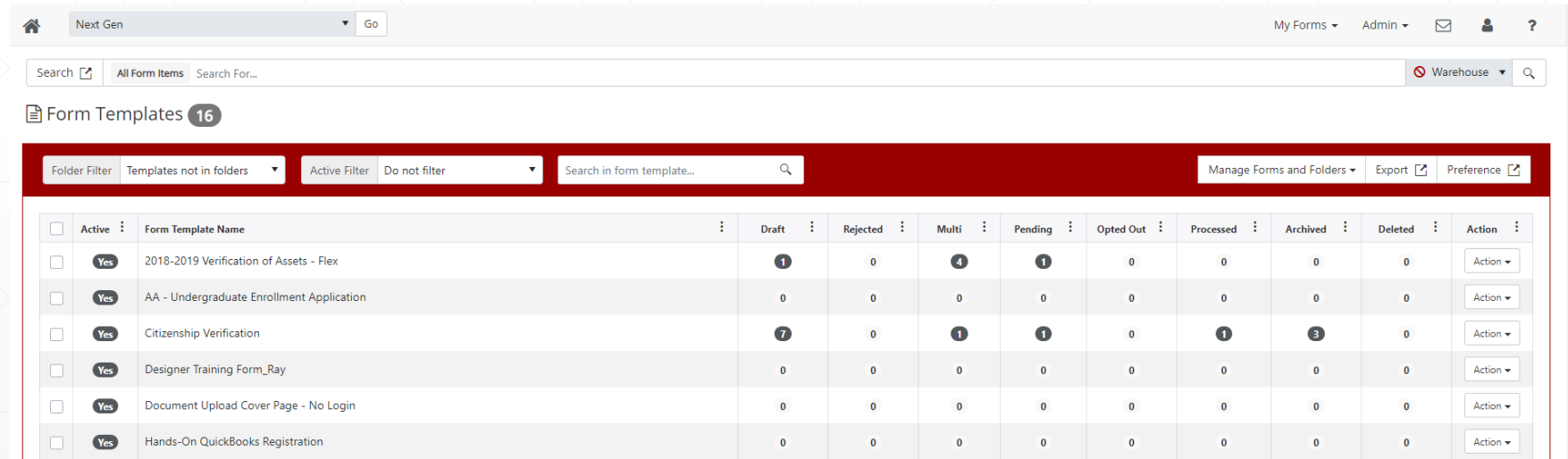
# New Look

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.



Status	Form Template Name	Reject	Multi	Pending	Processed	Archived	Action
<input type="checkbox"/>	#New form designer testing	0	0	0	0	0	Action
<input type="checkbox"/>	#Release 9.0 Testing	0	0	0	0	0	Action
<input type="checkbox"/>	\$Authorize.NET payment form (fill out form)	0	0	3	0	2	Action
<input type="checkbox"/>	\$Authorize.NET payment form - Server Integration (legacy method) (fill out form)	0	0	5	0	0	Action



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

# 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.

The screenshot shows the 'Form Templates' page. At the top, there's a navigation bar with 'My Forms', 'Admin', and a message icon. Below it is a search bar and a 'Warehouse' link. The main content area has a table of form templates. Annotations with arrows point to specific features: a green arrow points to the 'Invites' column header; a red arrow points to the 'Fill out Form' icon in the table; a black arrow points to the 'Returned' column header; a blue arrow points to the 'Export' button; and a purple arrow points to the 'Preference' button.

	Active	Invites	Form Template Name	Returned	Multi	Pending	Processed	Archived	Action
<input type="checkbox"/>	Yes	0	2018-2019 Verification of Assets - Flex	0	0	0	0	0	Action
<input type="checkbox"/>	Yes	0	AA - Undergraduate Enrollment Application	0	0	0	0	0	Action
<input type="checkbox"/>	Yes	0	Add/Drop Form	0	0	0	1	0	Action

# 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.

The screenshot shows the 'Form Templates' section of the Next Gen web application. The interface includes a top navigation bar with 'Next Gen' and 'Go' buttons, and a sidebar with 'My Forms' and 'Admin' links. The main content area displays a table of form templates with columns for Draft, Rejected, Multi, Pending, Opted Out, Processed, Archived, and Deleted. Green arrows point to the 'Draft', 'Opted Out', and 'Deleted' columns, highlighting the new statuses.

Active	Form Template Name	Draft	Rejected	Multi	Pending	Opted Out	Processed	Archived	Deleted	Action
<input type="checkbox"/> Yes	2018-2019 Verification of Assets - Flex	1	0	4	1	0	0	0	0	Action
<input type="checkbox"/> Yes	AA - Undergraduate Enrollment Application	0	0	0	0	0	0	0	0	Action
<input type="checkbox"/> Yes	Citizenship Verification	7	0	1	1	0	1	3	0	Action
<input type="checkbox"/> Yes	Designer Training Form_Ray	0	0	0	0	0	0	0	0	Action
<input type="checkbox"/> Yes	Document Upload Cover Page - No Login	0	0	0	0	0	0	0	0	Action
<input type="checkbox"/> 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.

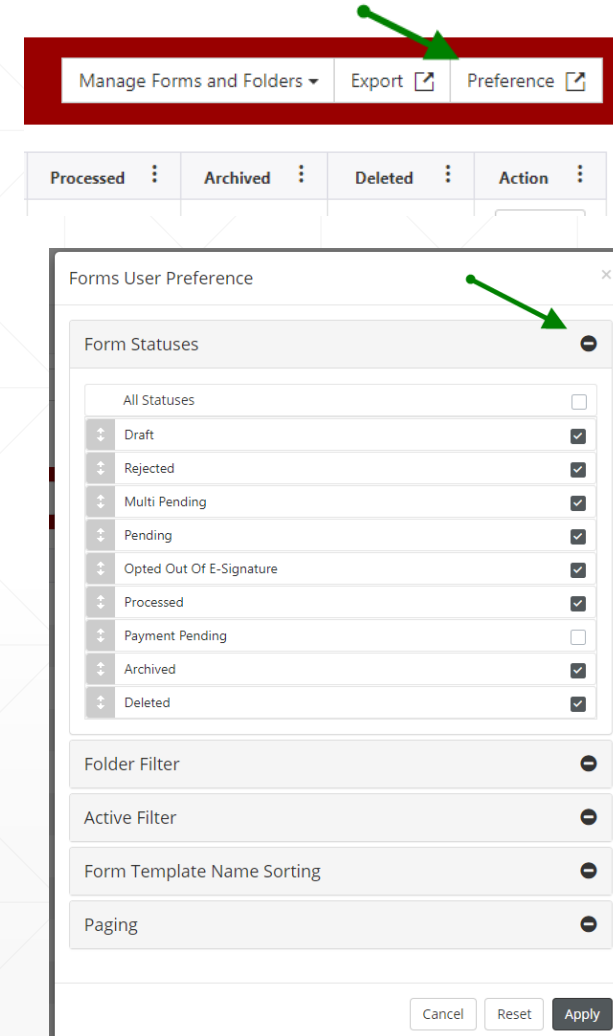
The screenshot displays the 'Form Templates' section of the Next Gen application. The interface includes a search bar, a filter section, and a table of form templates. The table has columns for 'Active', 'Form Template Name', and various statuses: Draft, Rejected, Multi, Pending, Opted Out, Processed, Archived, Deleted, and Action. The 'Draft' column is highlighted with a green arrow, and the 'Opted Out' and 'Deleted' columns are also highlighted with green arrows. The 'Deleted' column shows a count of 3 for the 'Citizenship Verification' template.

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

# 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.



The screenshot shows the 'Forms User Preference' dialog box. At the top, there is a red box highlighting the 'Preference' button in the top navigation bar. Below this, the dialog box is titled 'Forms User Preference'. It contains a section for 'Form Statuses' with a list of statuses and checkboxes. A green arrow points to the minus icon in the top right corner of the 'Form Statuses' section. Below the statuses, there are sections for 'Folder Filter', 'Active Filter', 'Form Template Name Sorting', and 'Paging'. At the bottom right, there are 'Cancel', 'Reset', and 'Apply' buttons.

Form Statuses	Checkmark
All Statuses	<input type="checkbox"/>
Draft	<input checked="" type="checkbox"/>
Rejected	<input checked="" type="checkbox"/>
Multi Pending	<input checked="" type="checkbox"/>
Pending	<input checked="" type="checkbox"/>
Opted Out Of E-Signature	<input checked="" type="checkbox"/>
Processed	<input checked="" type="checkbox"/>
Payment Pending	<input type="checkbox"/>
Archived	<input checked="" type="checkbox"/>
Deleted	<input checked="" type="checkbox"/>

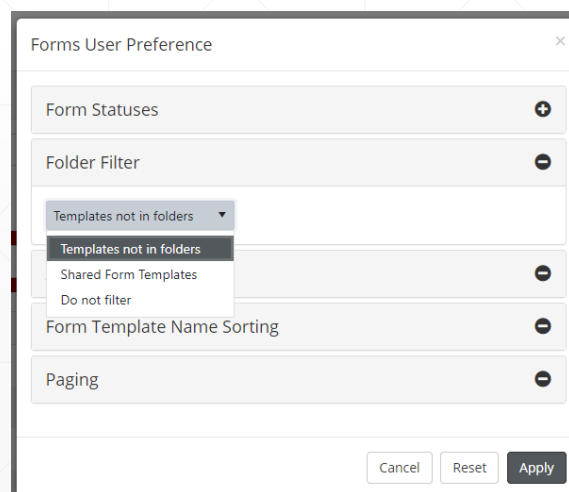
Folder Filter: [minus icon]  
Active Filter: [minus icon]  
Form Template Name Sorting: [minus icon]  
Paging: [minus icon]

Buttons: Cancel, Reset, Apply

# Other Homepage Preferences

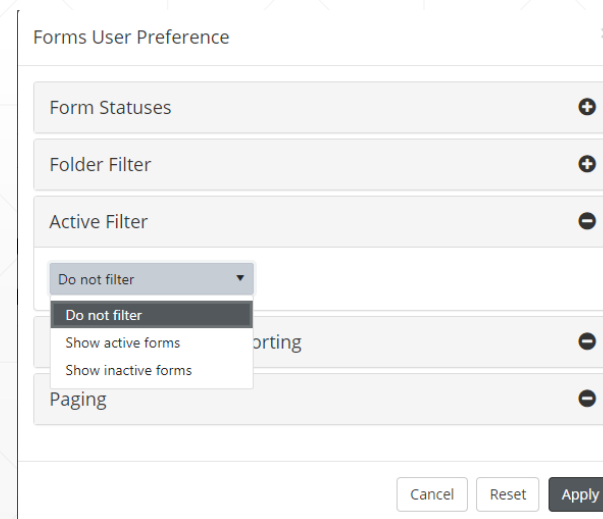
While we are here let's look at the other preferences

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

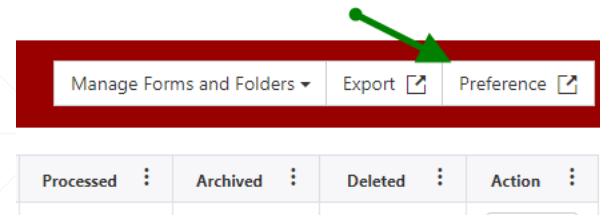


The 'Forms User Preference' dialog box is shown with the 'Folder Filter' section expanded. It contains a dropdown menu with the following options: 'Templates not in folders', 'Shared Form Templates', and 'Do not filter'. The 'Apply' button is highlighted in dark grey.

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



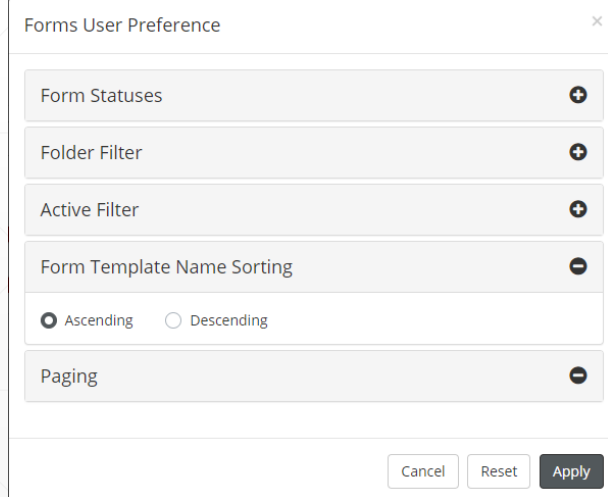
The 'Forms User Preference' dialog box is shown with the 'Active Filter' section expanded. It contains a dropdown menu with the following options: 'Do not filter', 'Show active forms', and 'Show inactive forms'. The 'Apply' button is highlighted in dark grey.



# Other Homepage Preferences

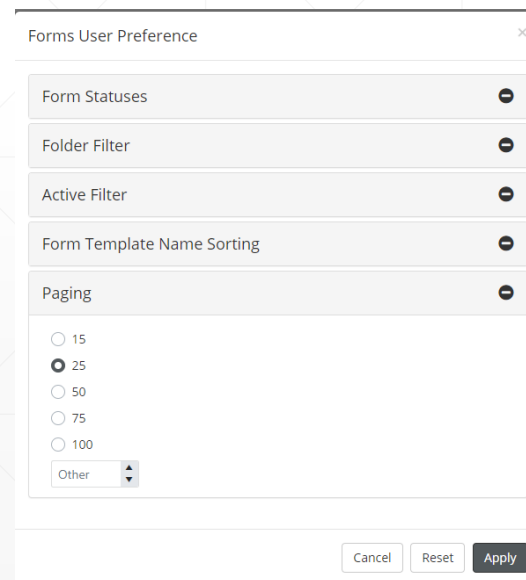
While we are here let's look at the other preferences

**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.

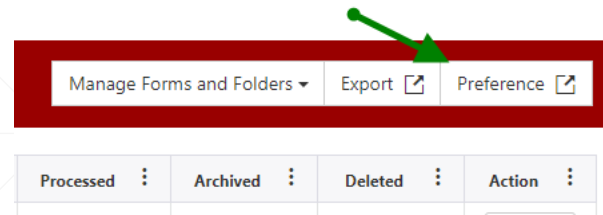


A dialog box titled "Forms User Preference" with a close button (X) in the top right corner. It contains five expandable sections: "Form Statuses", "Folder Filter", "Active Filter", "Form Template Name Sorting", and "Paging". Each section has a plus icon on the right. The "Form Template Name Sorting" section is currently expanded, showing two radio buttons: "Ascending" (selected) and "Descending". At the bottom, there are three buttons: "Cancel", "Reset", and "Apply".

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



A dialog box titled "Forms User Preference" with a close button (X) in the top right corner. It contains five expandable sections: "Form Statuses", "Folder Filter", "Active Filter", "Form Template Name Sorting", and "Paging". Each section has a minus icon on the right. The "Paging" section is currently expanded, showing a list of radio buttons: "15", "25" (selected), "50", "75", and "100". Below these is an "Other" option with a small input field and a dropdown arrow. At the bottom, there are three buttons: "Cancel", "Reset", and "Apply".







# Form Queues

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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





Next Gen


Go

My Forms

Admin







### Citizenship Verification
















All Statuses 13 Pending 1 Processed 1 Multi Pending 1 Draft 7 Archived 3

Search all statuses...

Selected Actions

Export

Preference

Action	PDF	Html	Audit	<input type="checkbox"/>	Form Status	Email	USCID	FirstName	LastName	selectdocscitizenship	Processed Date	Processed By
			<input type="checkbox"/>	Draft	mako@ngwebsolutions.com		Jonathan	Makofske	No			
			<input type="checkbox"/>	Draft	mako@ngwebsolutions.com	123456789	Jonathan	Makofske				
			<input type="checkbox"/>	Draft	mako@ngwebsolutions.com	123456789	Jonathan	Makofske				
			<input type="checkbox"/>	Draft	mako@ngwebsolutions.com	123456789	Jonathan	Makofske				
			<input type="checkbox"/>	Draft	mako@ngwebsolutions.com	123456	Jonathan	Makofske				

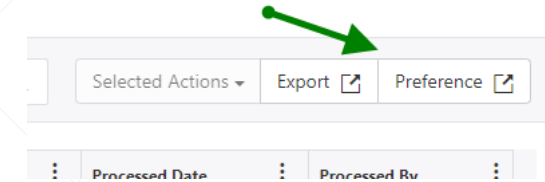
# Form Queue - Preferences

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 Template User Preference

Fields

All Fields

SubmitDate

ESignDate

ESignedByName

IsProcessed

IsImageProcessed

Email

USCID

FirstName

LastName

selectdocscitizenship

ProcessedDate

ProcessedByName

DraftSavedDate

DraftSavedByName

RejectedDate

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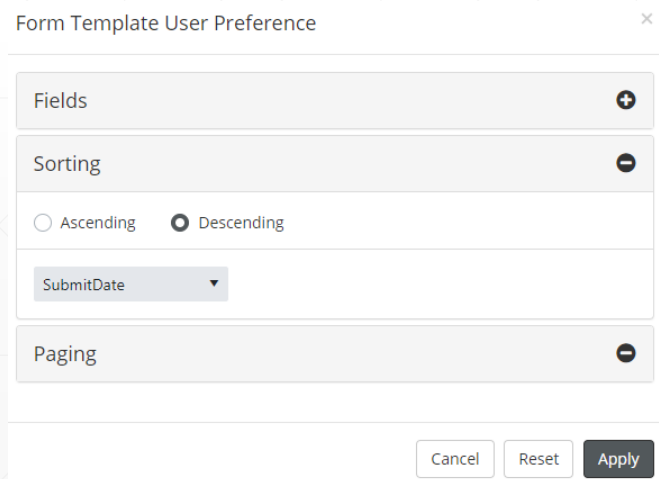
☒

☒

# 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.



Form Template User Preference

Fields +

Sorting -

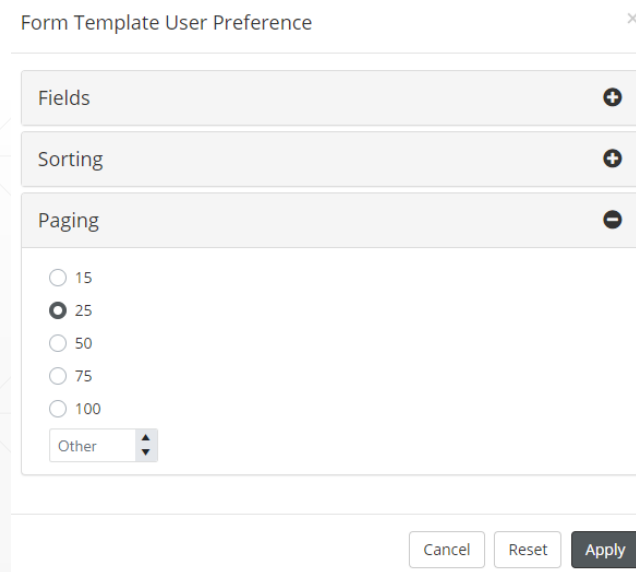
☐ Ascending ☒ Descending

SubmitDate ▾

Paging -

Cancel Reset Apply

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



Form Template User Preference

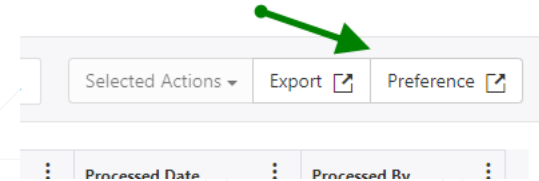
Fields +

Sorting +

Paging -

☐ 15  
☒ 25  
☐ 50  
☐ 75  
☐ 100  
Other ▴ ▾

Cancel Reset Apply



# 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.

The screenshot displays the 'Citizenship Verification' queue in a web application. At the top, there's a navigation bar with a home icon, a 'Next Gen' dropdown, and a 'Go' button. Below this, the title 'Citizenship Verification' is shown. A status filter bar includes tabs for 'All Statuses' (13), 'Pending' (1), 'Processed' (1), 'Multi Pending' (1), 'Draft' (7), and 'Archived' (3). The 'Pending' tab is selected. A table lists the forms in the queue. The first row shows a form with status 'Pending', email 'jim.grace@ngwebsolutions.com', and USCID '345352314'. The 'Action' column for this row has an expanded dropdown menu with the following options: 'Mark Processed', 'Archive', 'Clear Data Download Flag', 'Clear Image Download Flag', and 'Delete'. A green arrow points to the 'Action' column header. At the bottom, a pagination bar shows '1' of 1 items, with a '25 items per page' dropdown.

Action	PDF	Html	Audit		Form Status	Email	USCID	FirstName
Actions ▼ Mark Processed Archive Clear Data Download Flag Clear Image Download Flag Delete				<input type="checkbox"/>	Pending	jim.grace@ngwebsolutions.com	345352314	Jim

# 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.

The screenshot displays the 'Citizenship Verification' interface. At the top, there is a navigation bar with a home icon, a 'Next Gen' dropdown, a 'Go' button, and user information including 'My Forms', 'Admin', and icons for email, user profile, and help. Below the navigation bar, the 'Citizenship Verification' title is followed by a status filter bar. This bar includes buttons for 'All Statuses' (13), 'Pending' (1), 'Processed' (1), 'Multi Pending' (1), 'Draft' (7), and 'Archived' (3). A search bar labeled 'Search all statuses...' is also present. To the right of the search bar is a 'Selected Actions' dropdown menu, which is currently open, showing options for 'Export' and 'Preference', and a 'Delete selected forms' option. Below the filter bar is a table with columns: Action, PDF, Html, Audit, Form Status, Email, USCID, FirstName, LastName, selectdocscitizenship, Processed Date, and Processed By. The table contains four rows of data, all with 'Draft' status. Two green arrows point from the text above to the 'Draft' button and the 'Selected Actions' dropdown menu.

Action	PDF	Html	Audit	Form Status	Email	USCID	FirstName	LastName	selectdocscitizenship	Processed Date	Processed By
<input checked="" type="checkbox"/>				Draft	mako@ngwebsolutions.com		Jonathan	Makofske	No		
<input checked="" type="checkbox"/>				Draft	mako@ngwebsolutions.com	123456789	Jonathan	Makofske			
<input type="checkbox"/>				Draft	mako@ngwebsolutions.com	123456789	Jonathan	Makofske			
<input type="checkbox"/>				Draft	mako@ngwebsolutions.com	123456789	Jonathan	Makofske			

# 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).

Next Gen    Go    My Forms    Admin    ?

### Citizenship Verification

All Statuses 13   Pending 1   Processed 1   Multi Pending 1   **Draft 7**   Archived 3

Search all statuses...    Selected Actions    Export    Preference

Delete selected forms

Action	PDF	Html	Audit		Form Status	Email	USCID	FirstName	LastName	selectdocscitizenship	Processed Date	Processed By
				<input checked="" type="checkbox"/>	Draft	mako@ngwebsolutions.com		Jonathan	Makofske	No		
				<input checked="" type="checkbox"/>	Draft	mako@ngwebsolutions.com	123456789	Jonathan	Makofske			
				<input type="checkbox"/>	Draft	mako@ngwebsolutions.com	123456789	Jonathan	Makofske			
				<input type="checkbox"/>	Draft	mako@ngwebsolutions.com	123456789	Jonathan	Makofske			

# User Admin Screens

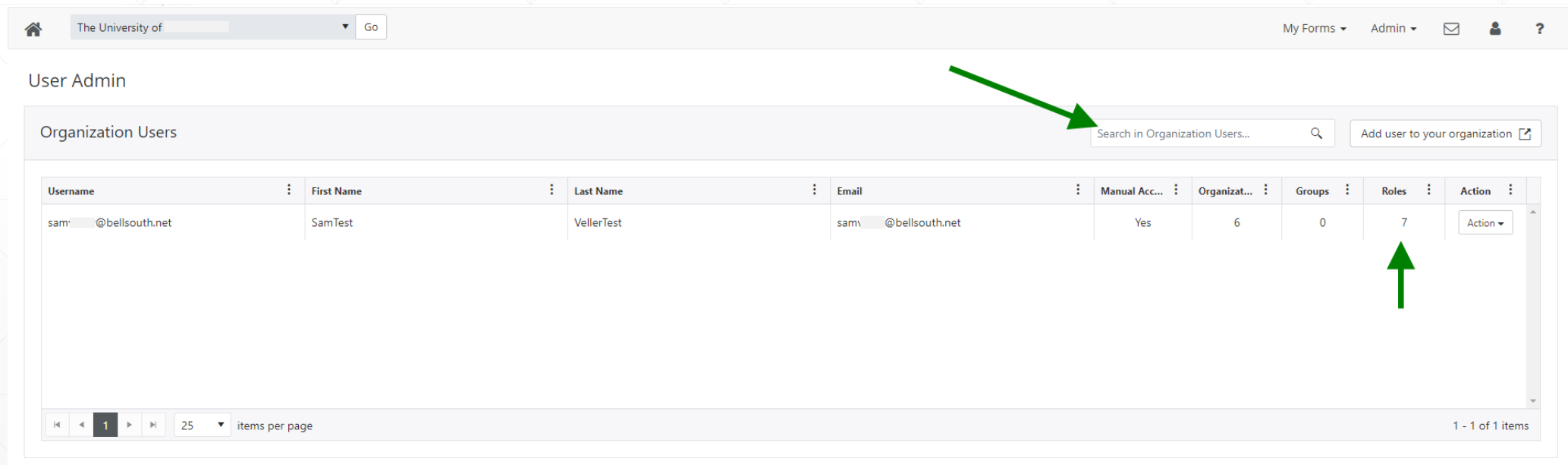
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New Enhancements



# 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.



The screenshot displays the 'User Admin' interface. At the top, there is a navigation bar with a home icon, a dropdown menu for 'The University of', a 'Go' button, and links for 'My Forms', 'Admin', email, user profile, and help. Below this, the 'User Admin' section is titled. A green arrow points to a search bar labeled 'Search in Organization Users...'. Another green arrow points to the 'Roles' column in the table, specifically to the number '7' in the first row, indicating a tooltip or profile view feature.

Organization Users

Username	First Name	Last Name	Email	Manual Acc...	Organizat...	Groups	Roles	Action
sam\ @bellsouth.net	SamTest	VellerTest	sam\ @bellsouth.net	Yes	6	0	7	Action

1 - 1 of 1 items

# User Admin Screens (continued)

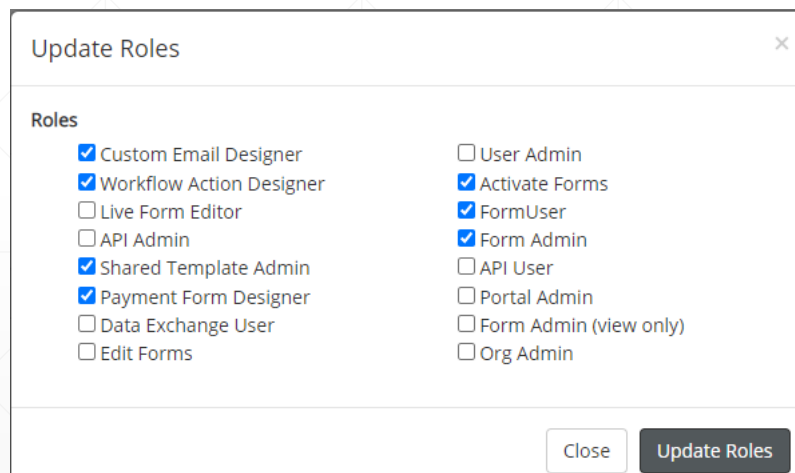
When editing a user, we are now presenting a screen that enables the admin to see all attributes of that user on one screen. The Use Admin can then modify any of the qualities of the user by clicking on the Edit button by the category to be changed.

The screenshot displays the 'Manage User' interface. At the top, there is a navigation bar with a home icon, a dropdown menu set to 'Next Gen', a 'Go' button, and links for 'My Forms', 'Admin', a mail icon, a user icon, and a help icon. The main content area is titled 'Manage User' and contains four panels, each with an 'Edit' button in the top right corner.

- Details Panel:** Displays user information: User Name (samveller@bellsouth.net), First Name (SamTest), Last Name (VellerTest), and Email Name (samveller@bellsouth.net).
- Organizations Panel:** Lists institutions: Lehigh Carbon Community College, Millersville University, Next Gen, Saint Mary's College, The University of Oklahoma, and University of Pennsylvania. It includes a pagination bar at the bottom.
- Groups Panel:** Features a 'Description' field and a pagination bar at the bottom.
- Roles Panel:** Lists various roles: CustomEmailDesigner, WorkflowActionDesigner, ActivateForms, FormUser, FormAdmin, SharedTemplateAdmin, and PaymentFormDesigner. It includes a pagination bar at the bottom.
- User Types Panel:** Lists user types: Administrator and Student. It includes a pagination bar at the bottom.

# 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.



The screenshot shows a modal dialog titled "Update Roles" with a close button (X) in the top right corner. Below the title bar, the word "Roles" is displayed. A list of roles follows, each with a checkbox. The roles are arranged in two columns. The first column contains: Custom Email Designer (checked), Workflow Action Designer (checked), Live Form Editor (unchecked), API Admin (unchecked), Shared Template Admin (checked), Payment Form Designer (checked), Data Exchange User (unchecked), and Edit Forms (unchecked). The second column contains: User Admin (unchecked), Activate Forms (checked), FormUser (checked), Form Admin (checked), API User (unchecked), Portal Admin (unchecked), Form Admin (view only) (unchecked), and Org Admin (unchecked). At the bottom right of the dialog, there are two buttons: "Close" and "Update Roles".

Role	Selected
Custom Email Designer	Yes
Workflow Action Designer	Yes
Live Form Editor	No
API Admin	No
Shared Template Admin	Yes
Payment Form Designer	Yes
Data Exchange User	No
Edit Forms	No
User Admin	No
Activate Forms	Yes
FormUser	Yes
Form Admin	Yes
API User	No
Portal Admin	No
Form Admin (view only)	No
Org Admin	No

# End User Form Screens

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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).

Next Gen

My Forms Admin

Search All Fields & Participants Search For...

### Pending / Draft Forms

Form Name	Status	Description	Date	PDF	HTML	Action
UF Employee Handbook Acknowledgment Form	Draft	Started By: Jim Grace	Last Saved: 10/05/2020 10:48 AM			Actions
New form -888	Pending	Started By: Jim Grace	Signature Request Date: 09/14/2020 11:02 AM			Actions
Citizenship Verification	Pending	Started By: Jim Grace	Signature Request Date: 07/30/2020 11:48 AM			Actions
UF Employee Handbook Acknowledgment Form	Draft	Started By: Jim Grace	Last Saved: 05/04/2020 02:12 PM			Actions
UF Employee Handbook Acknowledgment Form	Draft	Started By: Jim Grace	Last Saved: 04/23/2020 02:53 PM			Actions
UF Employee Handbook Acknowledgment Form	Draft	Started By: Jim Grace	Last Saved: 04/14/2020 11:37 AM			Actions
UF Employee Handbook Acknowledgment Form	Draft	Started By: Jim Grace	Last Saved: 04/06/2020 11:49 AM			Actions

# New Features

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# User Portal

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# 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.

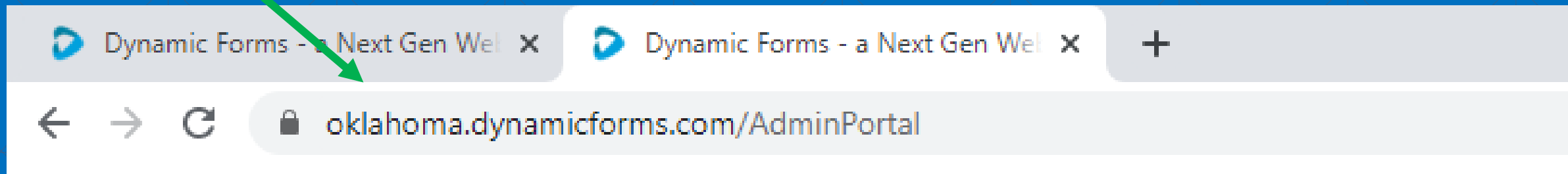
Our new User Portal includes the following functionality:

- Customized URL branding (e.g. [myschool.dynamicforms.com](https://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.

Next Gen ▼ Go

My Forms ▾ Admin ▾

### My Forms

#### Assigned To Me 2

**Jim's Formorama**  
Click Fill out form to continue. [Fill out form](#)

**Dependent Verification Form**  
Click Fill out form to continue. [Fill out form](#)

#### Other Forms 7

Search other forms...

[+ General Forms](#)

[+ OU - Registrar](#)

[View All](#)

#### Pending Action 68

**UF Employee Handbook Acknowledgment Form** DRAFT  
You saved a draft of this form on: 10/5/2020 10:48:33 AM [Actions ▼](#)

**New form -888** PENDING  
You signed the form on 9/14/2020 11:02:38 AM but other signatures are pending. [Actions ▼](#)

**Citizenship Verification** PENDING  
You signed the form on 7/30/2020 11:48:02 AM but other signatures are pending. [Actions ▼](#)

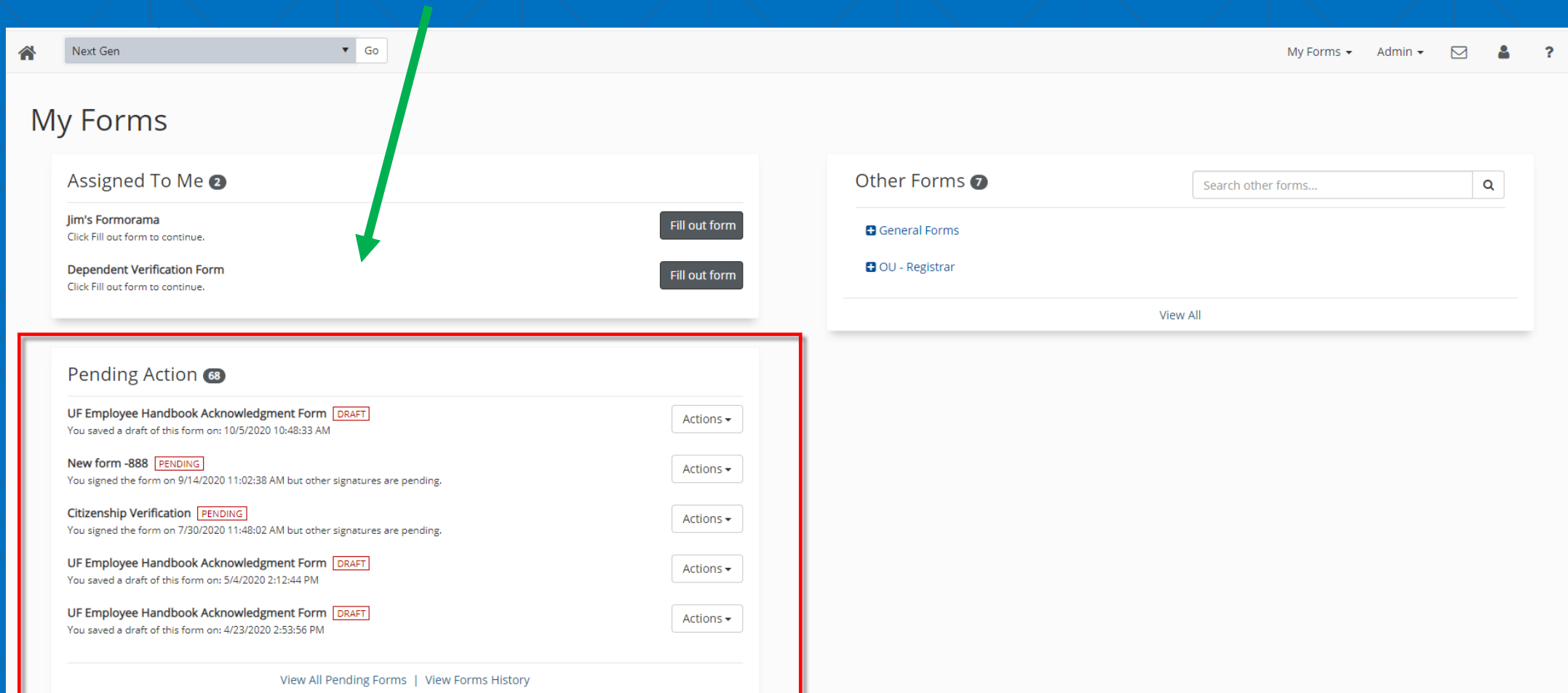
**UF Employee Handbook Acknowledgment Form** DRAFT  
You saved a draft of this form on: 5/4/2020 2:12:44 PM [Actions ▼](#)

**UF Employee Handbook Acknowledgment Form** DRAFT  
You saved a draft of this form on: 4/23/2020 2:53:56 PM [Actions ▼](#)

[View All Pending Forms](#) | [View Forms History](#)

## 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 screenshot displays the 'My Forms' portal interface. At the top, there is a navigation bar with a home icon, a search bar containing 'Next Gen' and a 'Go' button, and user options including 'My Forms', 'Admin', an email icon, a user profile icon, and a help icon. The main content area is divided into three sections: 'Assigned To Me' (2 items), 'Other Forms' (7 items), and 'Pending Action' (68 items). The 'Assigned To Me' section lists 'Jim's Formorama' and 'Dependent Verification Form', both with 'Fill out form' buttons. The 'Other Forms' section includes a search bar and links for 'General Forms' and 'OU - Registrar', with a 'View All' link at the bottom. The 'Pending Action' section, highlighted with a red border, lists four forms: 'UF Employee Handbook Acknowledgment Form' (DRAFT), 'New form -888' (PENDING), 'Citizenship Verification' (PENDING), and another 'UF Employee Handbook Acknowledgment Form' (DRAFT). Each form entry includes a brief description and an 'Actions' dropdown menu. At the bottom of the 'Pending Action' section, there are links for 'View All Pending Forms' and 'View Forms History'.

**My Forms**

**Assigned To Me 2**

- Jim's Formorama  
Click Fill out form to continue.
- Dependent Verification Form  
Click Fill out form to continue.

**Other Forms 7**

Search other forms...

- + General Forms
- + OU - Registrar

View All

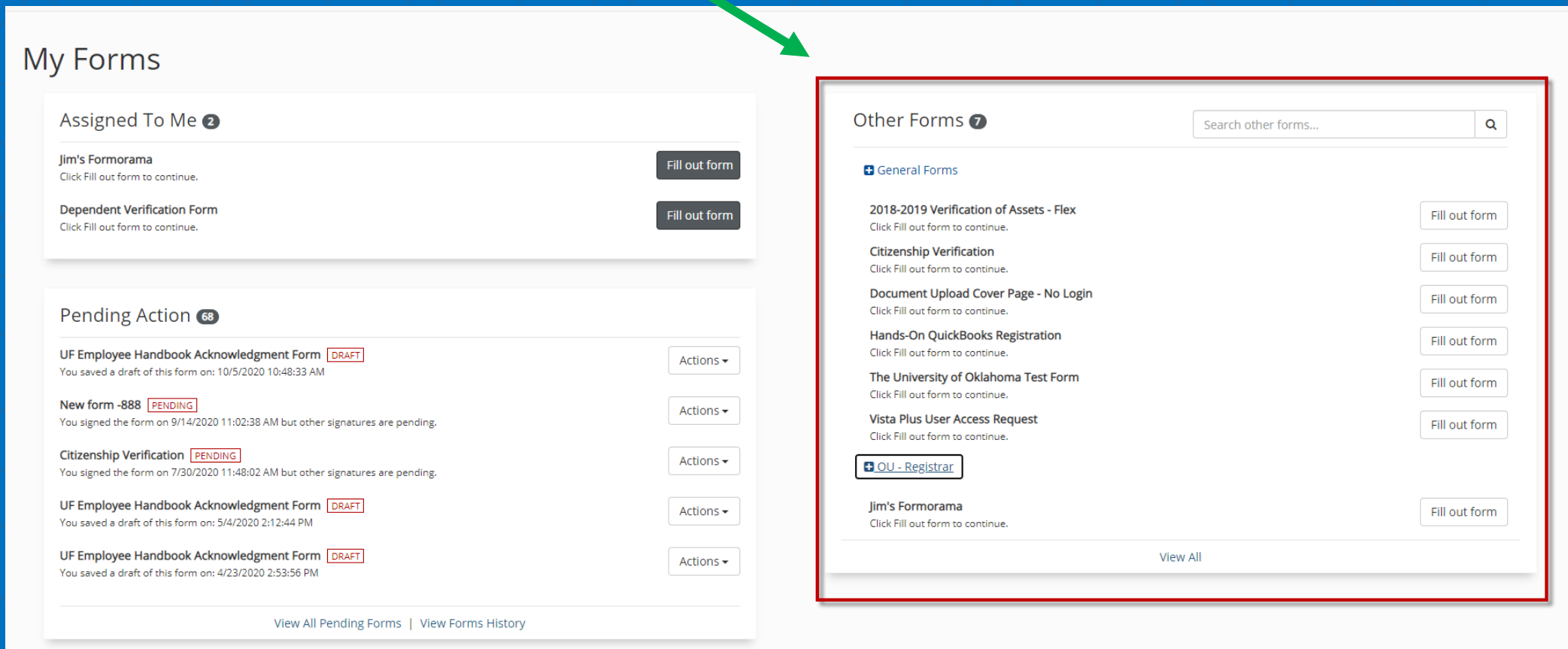
**Pending Action 68**

- UF Employee Handbook Acknowledgment Form **DRAFT**  
You saved a draft of this form on: 10/5/2020 10:48:33 AM
- New form -888 **PENDING**  
You signed the form on 9/14/2020 11:02:38 AM but other signatures are pending.
- Citizenship Verification **PENDING**  
You signed the form on 7/30/2020 11:48:02 AM but other signatures are pending.
- UF Employee Handbook Acknowledgment Form **DRAFT**  
You saved a draft of this form on: 5/4/2020 2:12:44 PM
- UF Employee Handbook Acknowledgment Form **DRAFT**  
You saved a draft of this form on: 4/23/2020 2:53:56 PM

View All Pending Forms | View Forms History

## 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.



**My Forms**

**Assigned To Me 2**

- Jim's Formorama**  
Click Fill out form to continue. [Fill out form](#)
- Dependent Verification Form**  
Click Fill out form to continue. [Fill out form](#)

**Pending Action 68**

- UF Employee Handbook Acknowledgment Form** DRAFT  
You saved a draft of this form on: 10/5/2020 10:48:33 AM [Actions ▼](#)
- New form -888** PENDING  
You signed the form on 9/14/2020 11:02:38 AM but other signatures are pending. [Actions ▼](#)
- Citizenship Verification** PENDING  
You signed the form on 7/30/2020 11:48:02 AM but other signatures are pending. [Actions ▼](#)
- UF Employee Handbook Acknowledgment Form** DRAFT  
You saved a draft of this form on: 5/4/2020 2:12:44 PM [Actions ▼](#)
- UF Employee Handbook Acknowledgment Form** DRAFT  
You saved a draft of this form on: 4/23/2020 2:53:56 PM [Actions ▼](#)

[View All Pending Forms](#) | [View Forms History](#)

**Other Forms 7**

[Q](#)

**General Forms**

- 2018-2019 Verification of Assets - Flex**  
Click Fill out form to continue. [Fill out form](#)
- Citizenship Verification**  
Click Fill out form to continue. [Fill out form](#)
- Document Upload Cover Page - No Login**  
Click Fill out form to continue. [Fill out form](#)
- Hands-On QuickBooks Registration**  
Click Fill out form to continue. [Fill out form](#)
- The University of Oklahoma Test Form**  
Click Fill out form to continue. [Fill out form](#)
- Vista Plus User Access Request**  
Click Fill out form to continue. [Fill out form](#)

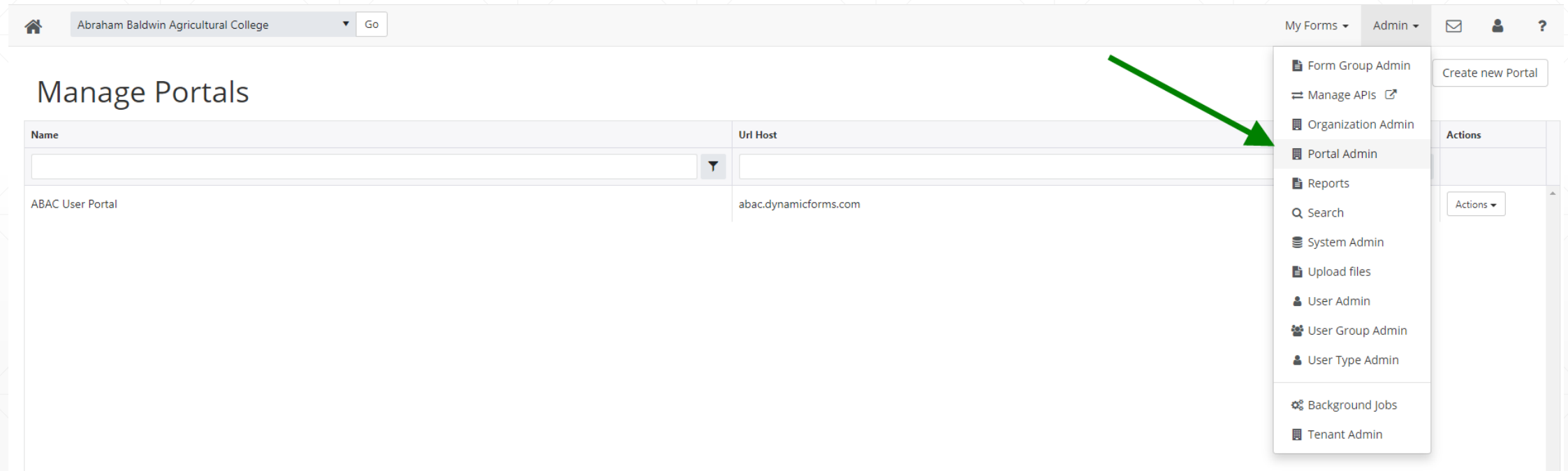
**OU - Registrar**

- Jim's Formorama**  
Click Fill out form to continue. [Fill out form](#)

[View All](#)

# 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).

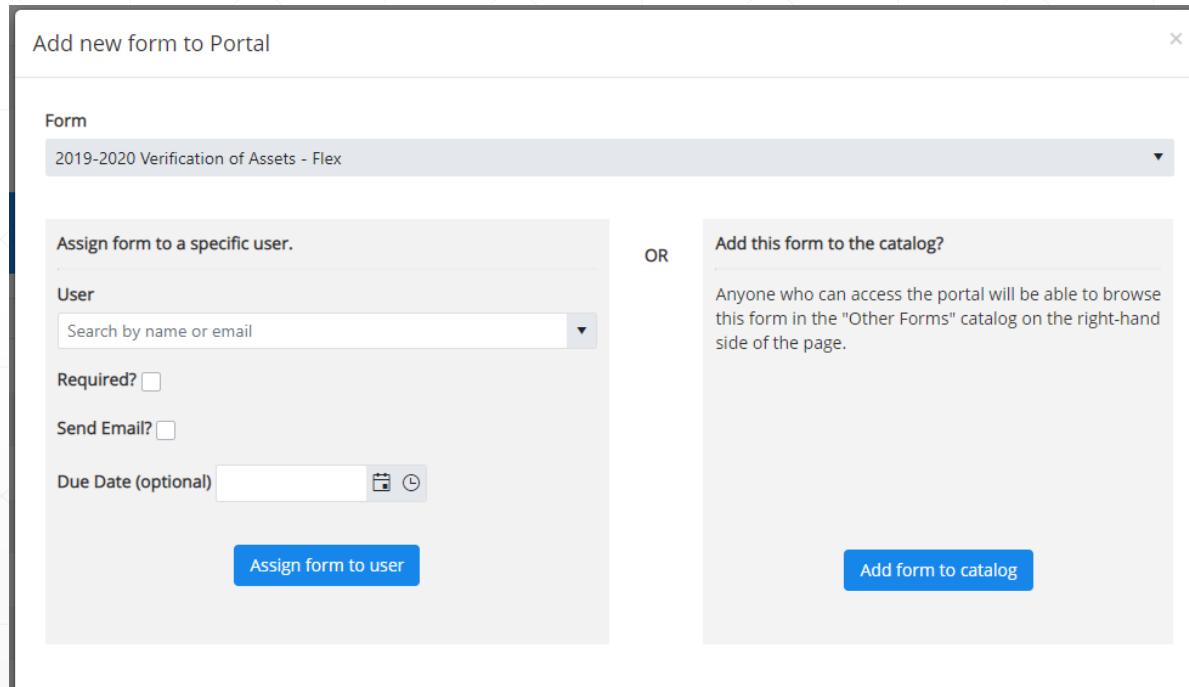


The screenshot displays the 'Manage Portals' interface. At the top, there is a header bar with a home icon, a dropdown menu showing 'Abraham Baldwin Agricultural College', a 'Go' button, and a 'My Forms' dropdown. To the right of the header is an 'Admin' dropdown menu, which is currently open, showing a list of administrative roles: Form Group Admin, Manage APIs, Organization Admin, Portal Admin, Reports, Search, System Admin, Upload files, User Admin, User Group Admin, User Type Admin, Background Jobs, and Tenant Admin. A green arrow points from the 'Admin' dropdown to the 'Portal Admin' role. Below the header, the 'Manage Portals' section features a table with two columns: 'Name' and 'Url Host'. The table contains one entry: 'ABAC User Portal' with the URL 'abac.dynamicforms.com'. To the right of the table is a 'Create new Portal' button and an 'Actions' dropdown menu.

Name	Url Host
ABAC User Portal	abac.dynamicforms.com

# 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)



The screenshot shows a modal dialog titled "Add new form to Portal" with a close button (X) in the top right corner. The dialog is divided into two main sections by a vertical line, with the word "OR" centered between them.

**Form Selection:** At the top, there is a dropdown menu labeled "Form" with the selected option "2019-2020 Verification of Assets - Flex".

**Left Section: Assign form to a specific user.**

- User:** A dropdown menu with the placeholder text "Search by name or email".
- Required?:** A checkbox that is currently unchecked.
- Send Email?:** A checkbox that is currently unchecked.
- Due Date (optional):** A date input field with a calendar icon and a clock icon.
- Action:** A blue button labeled "Assign form to user".

**Right Section: Add this form to the catalog?**

- Description:** A text block stating "Anyone who can access the portal will be able to browse this form in the 'Other Forms' catalog on the right-hand side of the page."
- Action:** A blue button labeled "Add form to catalog".

# 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.

If you have a properly-formatted file, you can create Dynamic Forms instances in bulk and notify the form owner to complete them

The screenshot displays a multi-step wizard interface for uploading a CSV file. The progress bar at the top shows six steps: 1. Choose your Form (completed), 2. Choose your File (current step), 3. Map User Fields, 4. Map Prefill Fields, 5. Customize Email, and 6. Upload. The main content area is divided into two sections. On the left, there is a checkbox labeled 'Has header row?' which is checked. Below it, the text 'Choose Your File (Only .csv files are accepted)' is followed by a 'Select file...' button. On the right, a 'Preview' section titled 'Preview (Showing first 5 rows)' contains a horizontal scrollbar, indicating a table of data is being displayed.

# 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

Employee Background Check - copy Version 1.8

Name / Type
Admin Notification
Payments
Custom Text
SSO
Events
Advanced

Name  
Employee Background Check - copy Version 1.8

Display Name  
Employee Background Check

Description  
This is the Header that should be used with every form

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.

2020- 2021 Verification of Income

Name / Type
Admin Notification
Payments
Custom Text
SSO
Events
Advanced


Pages +

Page 1

Name  
2020- 2021 Verification of Income

Display Name  
Verification of Income

Description  
This is the Header that should be used with every form

Document ID   
VANP21

Header Text


# Forms Template Changes (related to Portal)


## Employee Background Check - copy Version 1.8

Name / Type
Admin Notification
Payments
Custom Text
SSO
Events
Advanced

Pages +

Page 1

 Preview in Browser

 Preview as PDF


Last updated:  
Jim Grace Oct 16, 2020, 2:22:26 PM

Name  
Employee Background Check - copy Version 1.8

Display Name  
Employee Background Check

Description  
This is the Header that should be used with every form

Document ID  
Document ID

User Types 

- Admins
- Current Student
- Faculty
- Parent / Guardian
- Potential Student

**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.

Employee Background Check - copy Version 1.8

Name / Type
Admin Notification
Payments
Custom Text
SSO
Events
Advanced

Pages +

Page 1

[Preview in Browser](#)

Name

Employee Background Check - copy Version 1.8

Display Name

Employee Background Check


Description

This is the Header that should be used with every form

Document ID

Document ID

User Types

Show When Past Due?  

# Introducing - Invitations

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# 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.

The screenshot displays the Admin interface. At the top, there's a navigation bar with 'The University of' and a 'Go' button. Below it, a search bar and a 'Form Templates' section with a count of 16. A table lists various form templates with columns for Active, Invites, Form Template Name, Draft, Rejected, Multi, Pending, Opted Out, and Processed. A green arrow points to the 'Admin' menu, which is open, showing options like 'Form Group Admin', 'Form Invitations', 'Manage APIs', 'Organization Admin', 'Portal Admin', 'Reports', 'Search', 'System Admin', 'Upload files', 'User Admin', 'User Group Admin', 'User Type Admin', 'Background Jobs', and 'Tenant Admin'.

	Active	Invites	Form Template Name	Draft	Rejected	Multi	Pending	Opted Out	Processed
<input type="checkbox"/>	Yes	1	2018-2019 Verification of Assets - Flex	1	0	5	2	0	0
<input type="checkbox"/>	Yes	0	AA - Undergraduate Enrollment Application	0	0	0	0	0	0
<input type="checkbox"/>	Yes	0	Citizenship Verification	7	0	1	1	0	1
<input type="checkbox"/>	No	0	Dependent Verification Form	0	0	0	0	0	0
<input type="checkbox"/>	Yes	0	Designer Training Form_Ray	0	0	0	0	0	0
<input type="checkbox"/>	Yes	0	Document Upload Cover Page - No Login	0	0	0	0	0	0
<input type="checkbox"/>	Yes	0	Hands-On QuickBooks Registration	0	0	0	0	0	0

# 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.

## Form Invitation File - Upload File

[Back to File Uploads ↩](#)

If you have a properly-formatted file, you can create Dynamic Forms instances in bulk and notify the form owner to complete them

✓ Choose your Form

**2 Choose your File**

3 Map User Fields

4 Map Prefill Fields

5 Customize Email

6 Upload

☒ **Has header row?**

**Choose Your File** *(Only .csv files are accepted)*

Select file...

Preview  
(Showing first 5 rows)

# 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.

## Form Invitation File - Upload File

[Back to File Uploads](#)

If you have a properly-formatted file, you can create Dynamic Forms instances in bulk and notify the form owner to complete them

1 Choose your Form

2 Choose your File

3 Map User Fields

4 Map Prefill Fields

5 Customize Email

6 Upload

☒ Has header row?

**Choose Your File** (Only .csv files are accepted)

Select file...

Invites.csv  
0.27 KB

Preview  
(Showing first 5 rows)

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

< Previous

Next >



# 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.

## Form Invitation File - Upload File

If you have a properly-formatted file, you can create Dynamic Forms instances in bulk and notify the form owner to complete them

[Back to File Uploads](#)

✓ Choose your Form

✓ Choose your File

✓ Map User Fields

✓ Map Prefill Fields

5 Customize Email

6 Upload

**Subject**

**Message Body**  

</> B I U [align] [list] [link] [table] [undo] [redo] [grid]

(inherited font) (inherited size) A [link]

Dear {FirstName}:

Please complete your {FormName}.

Thank you,

The Office

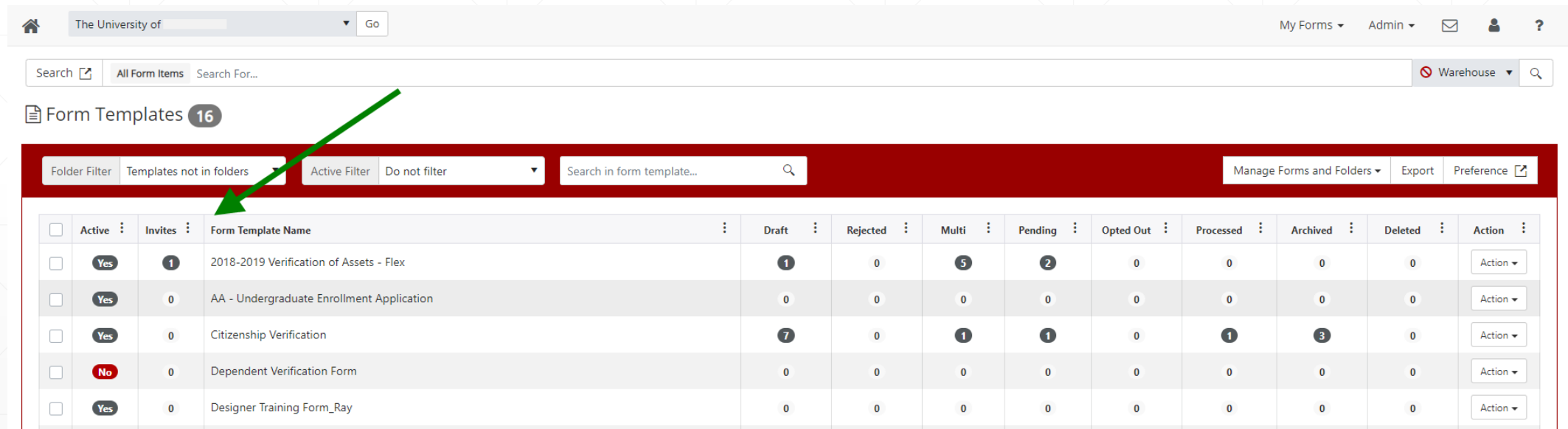
**Dynamic email values**  
These dynamic values from the form invitation can be added to the custom email body  

First Name

Add to Email Body

# 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.



The screenshot shows the 'Form Templates' page with a table of form templates. A green arrow points to the 'Invites' column header. The table has columns for 'Active', 'Invites', 'Form Template Name', 'Draft', 'Rejected', 'Multi', 'Pending', 'Opted Out', 'Processed', 'Archived', 'Deleted', and 'Action'.

	Active	Invites	Form Template Name	Draft	Rejected	Multi	Pending	Opted Out	Processed	Archived	Deleted	Action
<input type="checkbox"/>	Yes	1	2018-2019 Verification of Assets - Flex	1	0	5	2	0	0	0	0	Action
<input type="checkbox"/>	Yes	0	AA - Undergraduate Enrollment Application	0	0	0	0	0	0	0	0	Action
<input type="checkbox"/>	Yes	0	Citizenship Verification	7	0	1	1	0	1	3	0	Action
<input type="checkbox"/>	No	0	Dependent Verification Form	0	0	0	0	0	0	0	0	Action
<input type="checkbox"/>	Yes	0	Designer Training Form_Ray	0	0	0	0	0	0	0	0	Action

# Invitations via File Upload

Admins will be able to see 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.

**Dynamic Forms**  
Powered by Next Gen

Next Gen's Org Go My Forms Admin

### Form Invitations

Form Template Name	Sent	Started	Unstarted	Actions
2020-2021 Asset Worksheet Dependent Student	1	1	0	Actions
2020-2021 Household Worksheet Dependent Student	1	1		

1 25 items per page

- Manage Invitations
- Upload Invitation File
- Manage Custom Email

# Invitations via File Upload

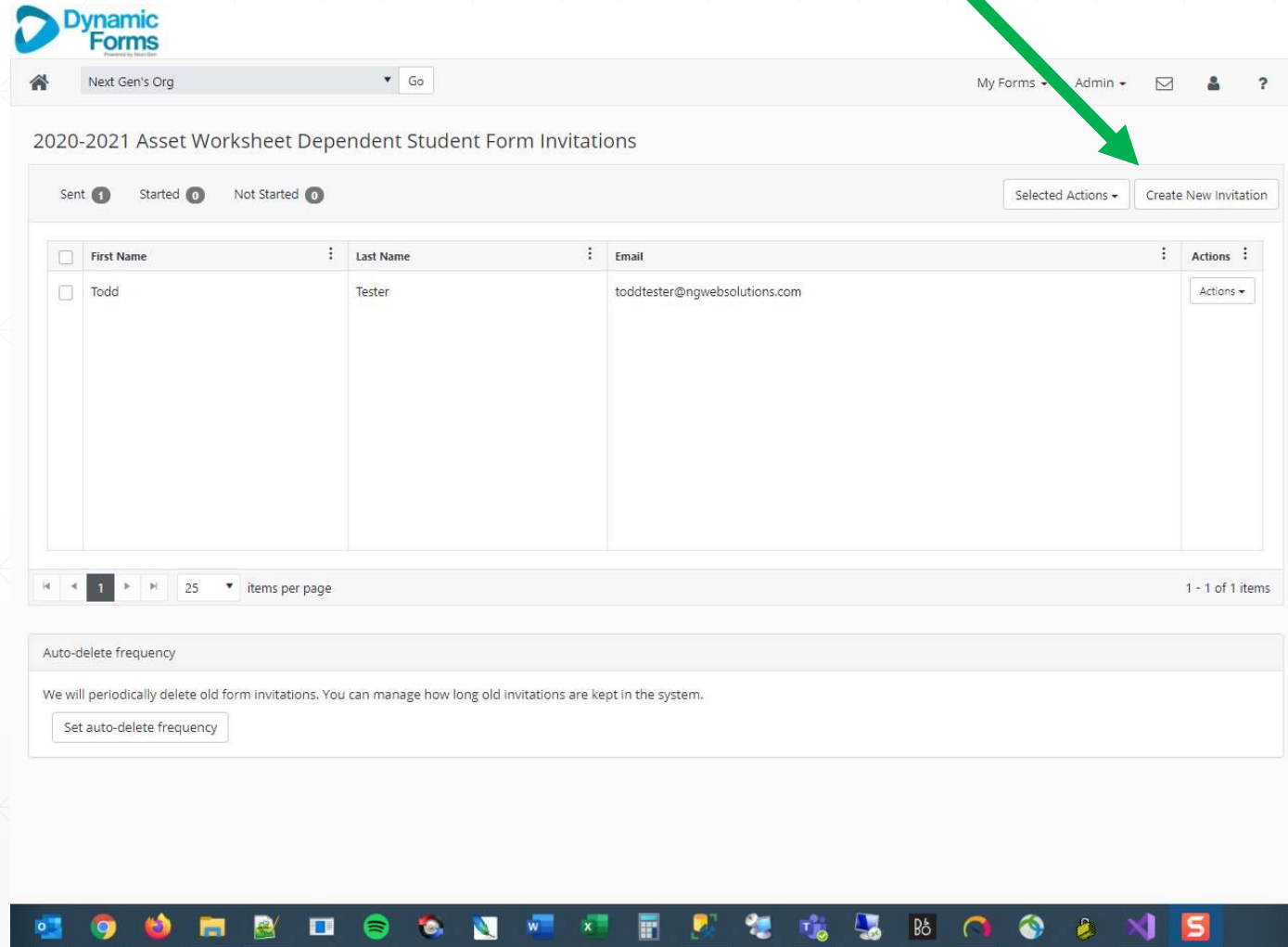
Diving down deeper, Admins will be able to look individually at specific users who have been sent invitations and resend or delete those invitations.

The screenshot displays the Dynamic Forms web application interface. At the top, the logo for Dynamic Forms is visible. Below the header, the page title is "2020-2021 Asset Worksheet Dependent Student Form Invitations". The interface includes a navigation bar with "Next Gen's Org" and a "Go" button. On the right, there are links for "My Forms", "Admin", and a user profile icon. The main content area shows a table of invitations. The table has columns for "First Name", "Last Name", "Email", and "Actions". A single row is visible for "Todd Tester" with the email "toddtester@ngwebsolutions.com". Above the table, there are filters for "Sent" (1), "Started" (0), and "Not Started" (0). To the right of the filters are buttons for "Selected Actions" and "Create New Invitation". Below the table, there is a pagination bar showing "1" of "1" items, with a "25" items per page dropdown. At the bottom of the page, there is a section titled "Auto-delete frequency" with a text box containing the message "We will periodically delete old form invitations. You can manage how long old invitations are kept in the system." and a button labeled "Set auto-delete frequency". The Windows taskbar is visible at the very bottom of the screenshot.

<input type="checkbox"/>	First Name	Last Name	Email	Actions
<input type="checkbox"/>	Todd	Tester	toddtester@ngwebsolutions.com	Actions

# 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.



The screenshot displays the Dynamic Forms web application interface. At the top, the logo 'Dynamic Forms' is visible. Below it, a navigation bar shows 'Next Gen's Org' and a 'Go' button. On the right, there are links for 'My Forms', 'Admin', and a user profile icon. The main heading is '2020-2021 Asset Worksheet Dependent Student Form Invitations'. Below this, there are filters for 'Sent' (1), 'Started' (0), and 'Not Started' (0). A 'Selected Actions' dropdown and a 'Create New Invitation' button are located in the top right of the table area. The table has columns for 'First Name', 'Last Name', 'Email', and 'Actions'. One row is visible with the name 'Todd Tester' and email 'toddtester@ngwebsolutions.com'. At the bottom, there is a section for 'Auto-delete frequency' with a 'Set auto-delete frequency' button. A Windows taskbar is visible at the very bottom of the screen.

<input type="checkbox"/>	First Name	Last Name	Email	Actions
<input type="checkbox"/>	Todd	Tester	toddtester@ngwebsolutions.com	Actions

# 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

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# 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.**

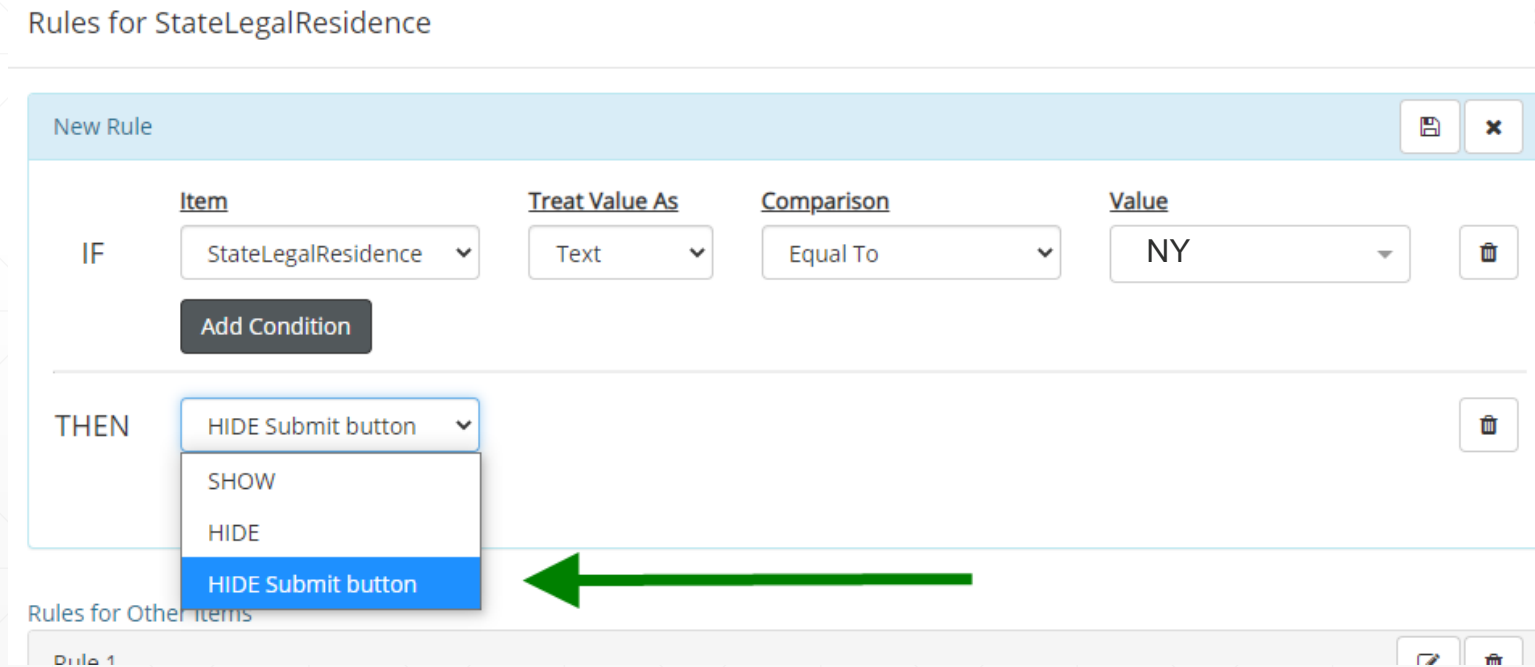
Rules for StateLegalResidence

New Rule

	Item	Treat Value As	Comparison	Value	
IF	StateLegalResidence	Text	Equal To	NY	
Add Condition					
THEN	HIDE Submit button				
SHOW					
HIDE					
HIDE Submit button					

Rules for Other Items

Rule 1





# 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.

## Edit Participant

Name

Final Approval System Budget Office

Owner ☐ No

Payer ☐ No

School ☐ No

Allow Repeat Signatures? ☐ No

Allow Return for Revision? ☒ Yes

Change Return for Anyone? ☐ No

SSO Link In Notification? ☐ No

States.

\* ☒ I hereby attest and certify, under penalty of perjury, that I am a c  
that.

SAVE PROGRESS

Return for Revision

Next

## 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.

### Return For Revision

This form will be returned for revision. Please enter the content of the email that will be sent to the previous form participant(s) to prompt them to review and/or re-submit the form.

To

Advisor: SamTest VellerTest (samveller@bellsouth.net)

From

Jim Grace (jim.grace@ngwebsolutions.com)

Subject

Body

Source

B I U X A

Styles

Format

Font

Size

Characters (including HTML): 0

Return this form for revision

Cancel and return to form

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

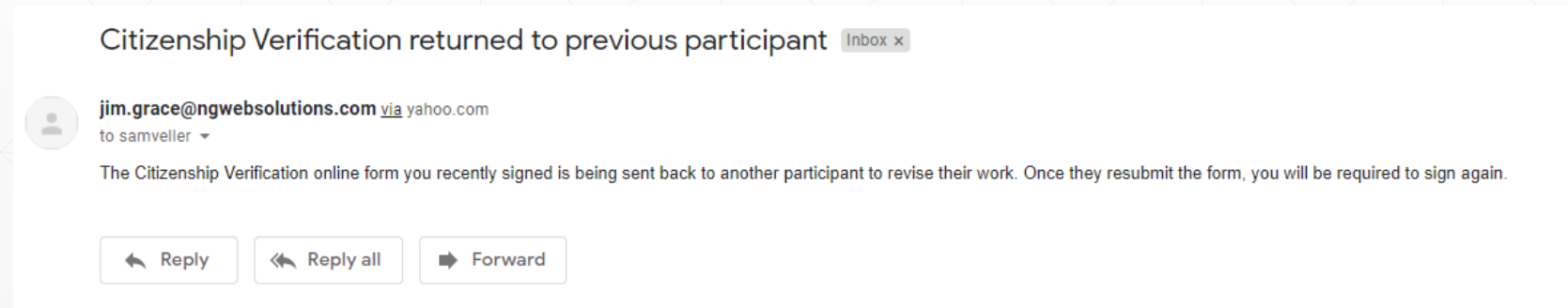
# Return form back to more than one participant

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.

Allow Drafts to be Saved	<input checked="" type="checkbox"/> Yes
Show form timer?	<input type="checkbox"/> No
Show welcome screen?	<input type="checkbox"/> No
Use Recaptcha validation?	<input type="checkbox"/> No
Use Automatic Activation?	<input type="checkbox"/> No
Prompt User Before Submitting Form? <small>For use with forms using a signature widget or no signature forms</small>	<input type="checkbox"/> No
Notify Users When Rejected Over?	<input checked="" type="checkbox"/> Yes

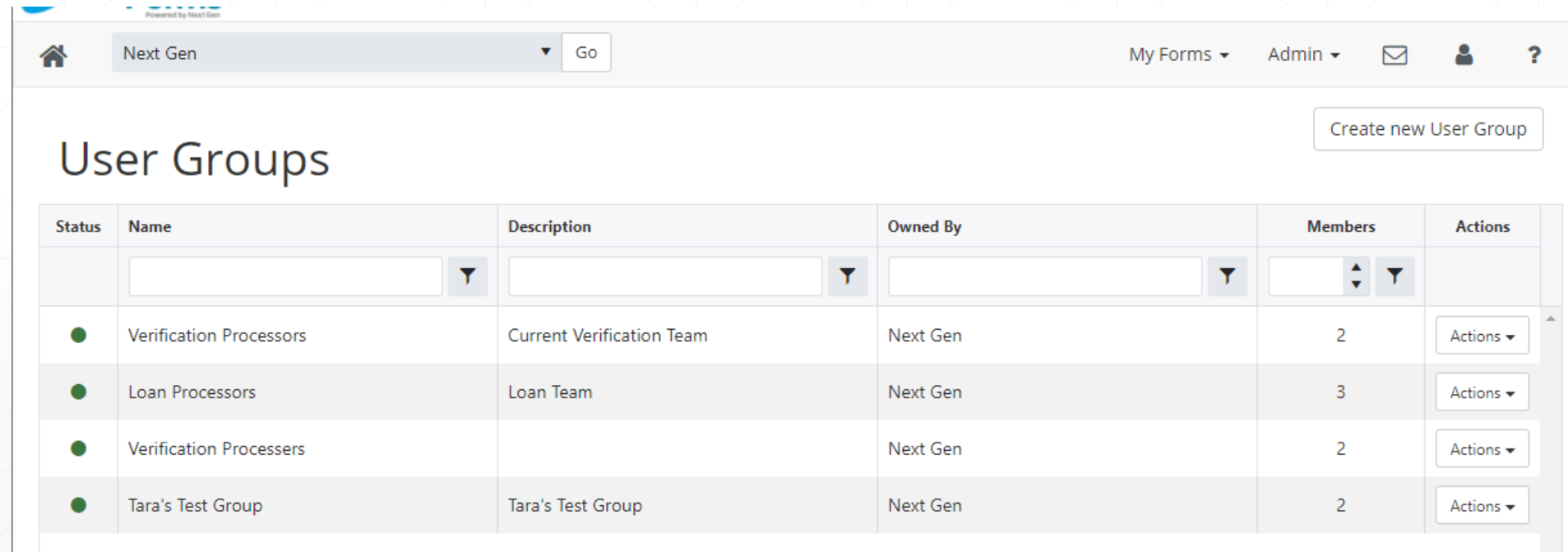
When clicked to Yes, all participants who have previously signed the form will receive an email notification that the form has been returned.

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.



The screenshot displays the 'User Groups' management interface in the Next Gen system. At the top, there is a navigation bar with a home icon, a dropdown menu set to 'Next Gen', and a 'Go' button. On the right side of the navigation bar are links for 'My Forms', 'Admin', an email icon, a user profile icon, and a help icon. Below the navigation bar, the title 'User Groups' is prominently displayed, followed by a 'Create new User Group' button. The main content area features a table with the following columns: Status, Name, Description, Owned By, Members, and Actions. The table lists four user groups, each with a green status indicator, a name, a description, the owner 'Next Gen', and a member count. Each row has an 'Actions' dropdown menu.

Status	Name	Description	Owned By	Members	Actions
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
●	Verification Processors	Current Verification Team	Next Gen	2	Actions ▾
●	Loan Processors	Loan Team	Next Gen	3	Actions ▾
●	Verification Processors		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.

### Form Group Details

**User Group Name**

**Description**

**Managed By Org**

Next Gen

Save

### Form Templates

Add Form Template

Org Name	Form Name	Actions
<div></div>	<div></div>	
Next Gen	CU - Labor Law Section 195(1)_DRAFT ONLY	Actions
Next Gen	Leave Request Form	Actions

# Introducing – Form Groups - Reporting

Administrators will be able to pull a completed Forms Group report

Forms Group completed by Date – most recent.

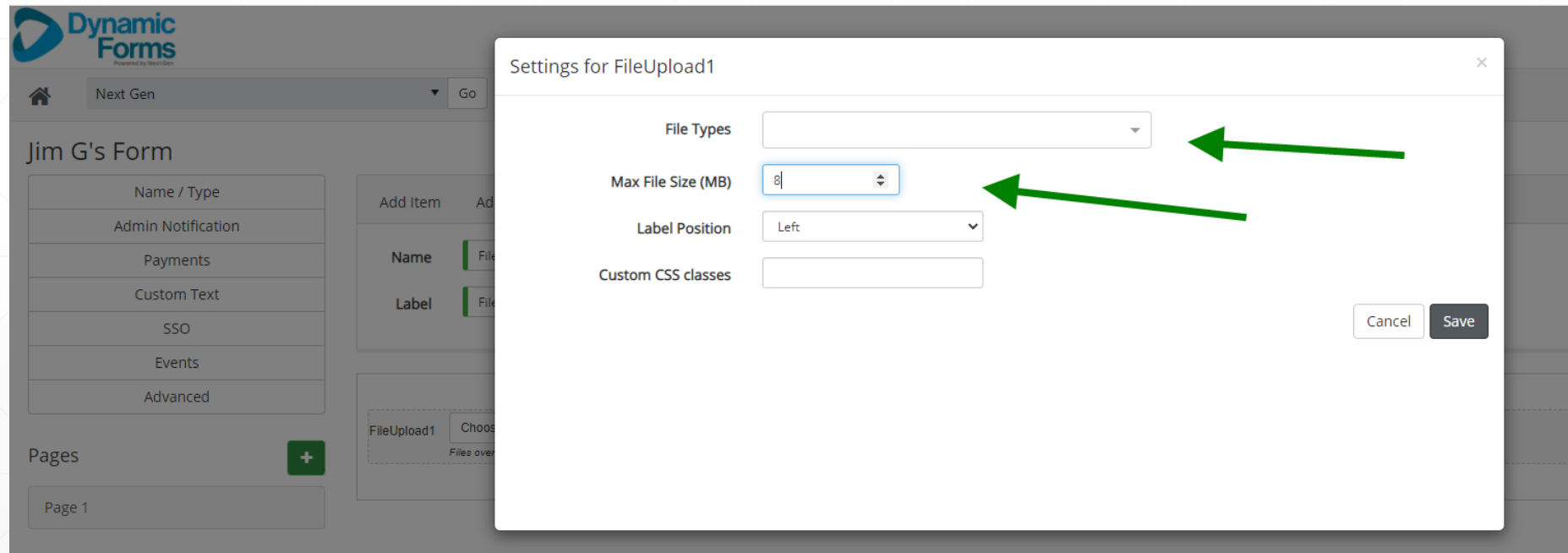
## Forms Report

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.

Table1

CRN	CRN1	Subject	Subject1	Course	Course1	Title	Title1
CRN	CRN2	Subject	Subject2	Course	Course2	Title	Title2
CRN	CRN3	Subject	Subject3	Course	Course3	Title	Title3
CRN	CRN4	Subject	Subject4	Course	Course4	Title	Title4
CRN	CRN5	Subject	Subject5	Course	Course5	Title	Title5

School

Demo School

Data Set

Student Courses

Action

Prefill form values from a data set.

Criteria

No criteria are required for this dataset.

Field Mappings

☒ Multiple Records

Record #	API Field	Form Field		
1	CRN	CRN1		
2	CRN	CRN2		
3	CRN	CRN3		
<div>3</div>	<div>-- Select a Field --</div>	<div>-- Select a Page Item --</div>	<div>Add</div>	

# 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!**

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