

# Dynamic Forms Basics

USER GUIDE

ADMISSIONS AND RECORDS

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# Log in

To login to Dynamic Forms use our ITS created login page and sign in with your AHC Username and Password.

<https://bit.ly/3FrizVw>

## Welcome to Dynamic Forms

### The User Interface

#### Dashboard

All of forms display with the following options:

- **Edit Form Template** – Users can update basic items such as form name
- **Activate / Deactivate** – Allow users to take forms offline
- **Copy Form Template** – Users can copy any existing form
- **URL Instructions** – Provides users embedding URL
- **Delete Form Template** – Deletes form from org unit
- **Fill out Form** – Users can view the form or fill out should they choose

**\*Note:** When a form is active and has submissions (**Reject / Multi / Pending / Processed / Archived**) the 'Edit Form Template' option is not available. To continue editing a form you will need to clear out all forms before the option to edit will be available or copy the form to update and make the updated form active. Make sure that you deactivate the original.

Multiple / Pending / Processed / Archived Signatures - Shows Form Administrators

Reject	Multi	Pending	Processed	Archived
0	1	0	0	0
0	0	0	0	0

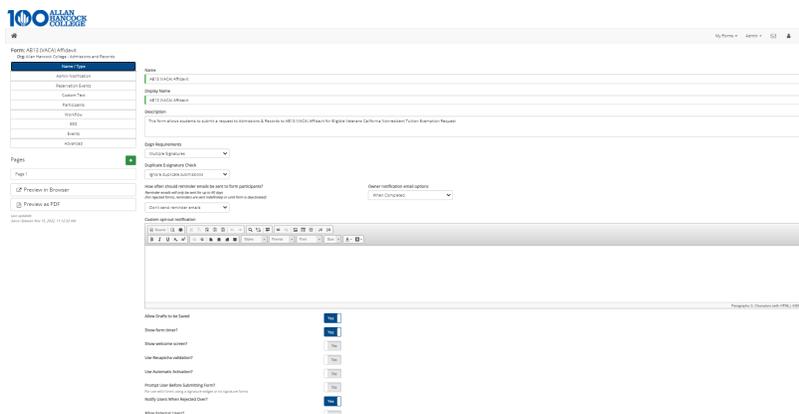
how many forms are at each stage of the process. The numbers in each column link users to a list of all submissions in each stage

Add New From – Users can start a new form. You can use a template or copy from another department or an existing one you've already created.



## Setting Up a New Form

### Form Name/Type Page



Name – Name of the form – this can be part of the subject line in emails  
Description – for your information only

### Sign Requirements

- **None** – Will not require a Form Submitter to login to fill out and submit the form.
- **Single-Signature** – Forces Form Submitter to login to Dynamic Forms and sign the form electronically before submitting it.
- **Multi-Signature** – Allows Form Administer to apply a multi-signature work flow to a form. (This topic will be covered in our **Advanced Designer–Dynamic Forms** training.)

Show the form timer?

A logout timer set to 45min. displays on Dynamic Forms by default. Once a Form Submitter has been inactive for 45 minutes, they will be logged out of Dynamic Forms. **We recommend leaving this set to**

**“yes”.**

Use Recaptcha

Validation?

Forces submitters to enter a security code before submitting. ***Please leave this set to “yes” if your form does not require a login complete.*** They will prevent robots from filling out your form.

## Admin Notification Page

Allows Form Administer to set up custom emails to be sent to self or other form administrators either at set intervals or each time a form has been submitted.

The screenshot shows the 'Admin Notification' configuration page for the 'AB13 (VACA) Affidavit' form. The page is titled 'Form: AB13 (VACA) Affidavit' and 'Org: Allan Hancock College - Admissions and Records'. On the left, there is a table with a 'Name / Type' column and several rows: 'Admin Notification' (highlighted in blue), 'Reservation Events', 'Custom Text', 'Participants', 'Workflow', 'SSO', 'Events', and 'Advanced'. Below this table is a 'Pages' section with a green plus icon, a 'Page 1' input field, and buttons for 'Preview in Browser' and 'Preview as PDF'. On the right side, there are settings for 'Notification Frequency' (set to 'Every form'), 'Notification email recipient(s)' (with the email 'admissions\_help@hancockcollege.edu' entered), and two toggle buttons for 'Only notify the admin after all signatures have been collected?' and 'Use custom email?', both currently set to 'No'. At the bottom left, it says 'Last updated: Aaron Stewart Nov 15, 2022, 11:12:32 AM'.

## Custom Text

Inactive Text

- This text displays when a Form Submitter has been timed out of your form.

Confirmation Text

- This text will display when the Form Submitter submits your form successfully.



Form: AB13 (VACA) Affidavit  
Org: Allan Hancock College - Admissions and Records

Name / Type
Admin Notification
Reservation Events
<b>Custom Text</b>
Participants
Workflow
SSO
Events
Advanced

Pages +

Page 1

[Preview in Browser](#)

[Preview as PDF](#)

Last updated:  
Aaron Stewart Nov 15, 2022, 11:12:32 AM

Inactive Text

Source | Undo | Redo | Bold | Italic | Underline | Text Color | Background Color | Bulleted List | Numbered List | Indent Left | Indent Right | Decrease Indent | Increase Indent | Search | Styles | Format | Font | Size | Text Color | Background Color

## Single Sign On (SSO)

Allows Form Administer to set up custom SSO messages for submitters who did not login successfully. At the bottom of this tab is an option to set the owner (Form Submitter ) notification emails to include SSO links to the forms. ***Change this to “yes” for any forms that will be only internal to ETSU.***



Form: AB13 (VACA) Affidavit  
Org: Allan Hancock College - Admissions and Records

Name / Type
Admin Notification
Reservation Events
Custom Text
Participants
Workflow
<b>SSO</b>
Events
Advanced

Pages +

Page 1

[Preview in Browser](#)

[Preview as PDF](#)

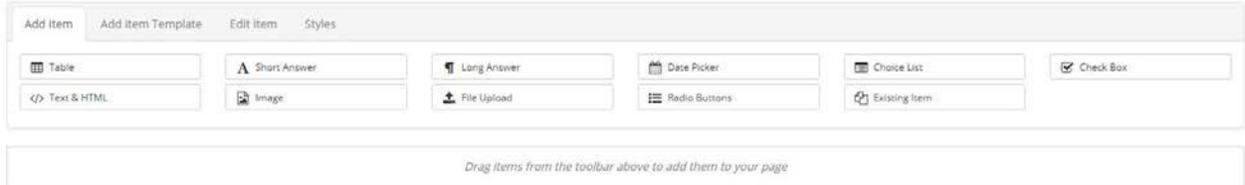
Last updated:  
Aaron Stewart Nov 15, 2022, 11:12:32 AM

SSO Message

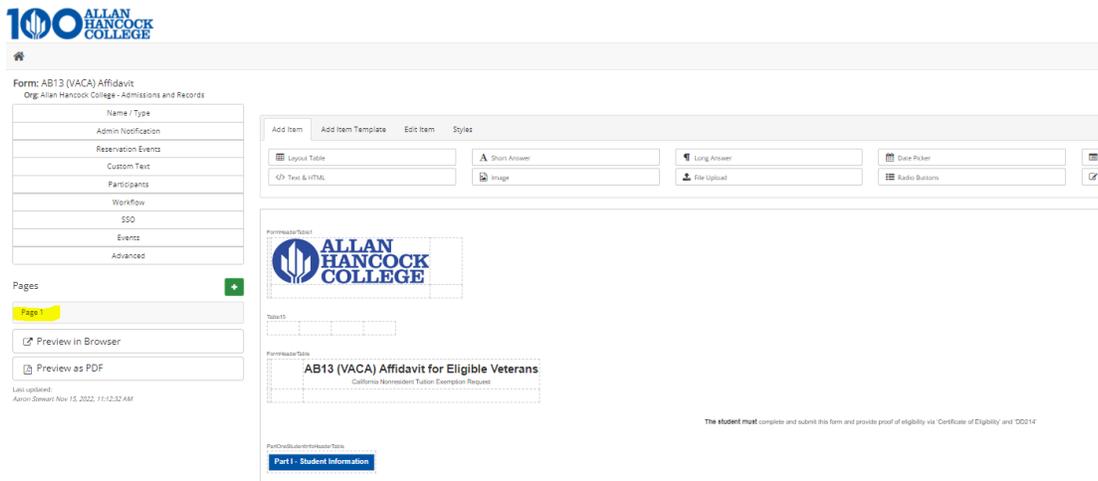
Source | Undo | Redo | Bold | Italic | Underline | Text Color | Background Color | Bulleted List | Numbered List | Indent Left | Indent Right | Decrease Indent | Increase Indent | Search | Styles | Format | Font | Size | Text Color | Background Color

Owner Notification Email uses SSO link?

# Building Your Form

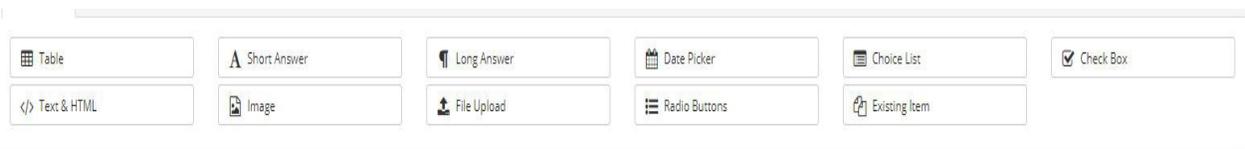


Once a Form Administer creates a new form, they will be taken to the form’s configuration page. The forms configuration page includes the form designer.



## Add New Form Item

After clicking on Add Item you are presented with the following



Once you have selected an Add Item and drag it to your form, you will see these options to the right of the edit item tab.



### Advanced

The advanced button gives you different options to modify the Add Item that you had selected.

### Rules/Conditions

Rules/Conditions will be covered in our **Advanced Designer– DynamicForms** training.

### Save

Save button saves your selections.

### Delete

Delete button removes the Add Item.

### Add Items

### Table

Tables can be added to the form for greater formatting flexibility. You have full control over the number of rows and columns in a table.

### Long Answer

This provides an area where a user can type in a block of information. A text area field displays as:

The text area allows the user to input a lot of textual information



Add Item   Add Item Template   **Edit Item**   Styles

Name    Width     Required?

Label    Height     Hide label?

*Add some content using the "Text" field above.*

TextArea1

## Long Answer – Advanced Options

Settings for TextArea1

Maximum Length

Prefill from API?

0f93fdc5-2e95-40b1-a851-e6dcd9c541

## Short Answer

These are used to display text and to accept text entry from users. A text box displays as:

Last Name:

Add Item   Add Item Template   **Edit Item**   Styles

Name    Width     Required?

Label     Hide label?

*Add some content using the "Text" field above.*

TextBox1

## Short Answer – Advanced Options

## Settings for TextBox1

×

Field Type   Mask input?

Minimum Length  Maximum Length

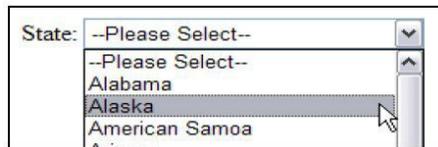
ed6ff075-0cae-42c6-b2c4-59535a7ca472

Cancel

Save

## Choice List

These are used to display a list of specific options that a user can select from when completing an online form. A drop-down list displays as:



## Settings for DropDownList1

×

Default entry text

- Please Select --
- Choose --
- (blank)
- Other

Items

Manual

API

Value	Description	
<input type="text" value="Value"/>	<input type="text" value="Description"/>	<input type="button" value="+"/>

Include in library?  No

Active?  No

ba00afca-6e39-47d4-b690-e7d2511f6cdb

Cancel

Save

Default entry text

-- Please Select --

-- Choose --

(blank)

Other

Items

Manual

API

*Drag and drop items to reorder*

Value	Description		
R	Red		
G	Green		
Y	Yellow		
<input type="text" value="b"/>	<input type="text" value="Blue"/>		

Include in library?  No

Active?  No

ba00afca-6e39-47d4-b690-e7d2511f6cdb

Cancel

Save

## Check Box

This element can be turned on or off using a mouse click. A check box displays as:

 Check Box

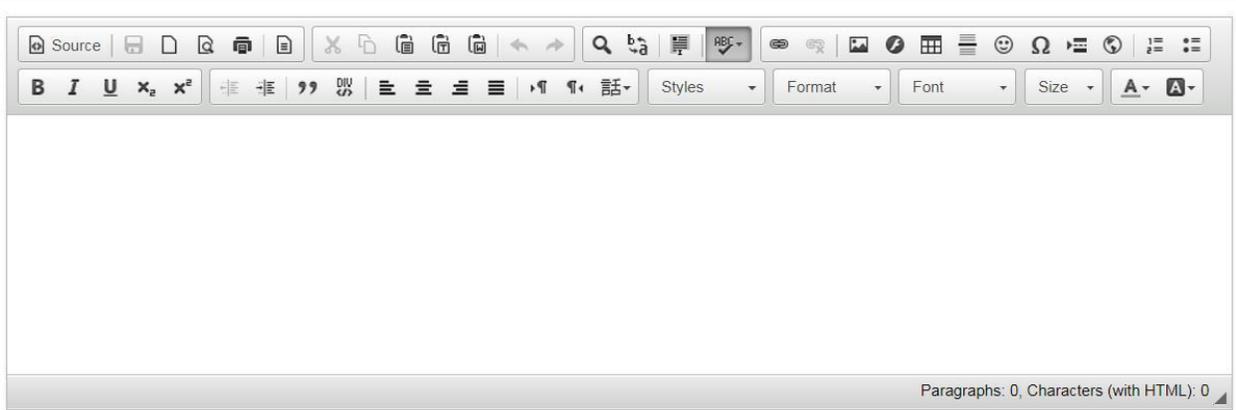
Add Item	Add Item Template	Edit Item	Styles
Name	<input type="text" value="CheckBox1"/>	<input type="checkbox"/> Required?	 Advanced
Label	<input type="text" value="Checkbox"/>	<input type="checkbox"/> Hide label?	 Rules
			 Save
			 Delete

Add some content using the "Text" field above.

Checkbox

## Text and HTML

This item is used to display written instructions or information to the user who will complete the online form



Cancel Save

### Image

This is used to add images/logos to a form.



Form: AB13 (VACA) Affidavit  
Org: Allan Hancock College - Admissions and Records

Name / Type
Admin Notification
Reservation Events
Custom Text
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Pages +

Page 1

Add Item   Add Item Template   Edit Item   Styles

Layout Table   Short Answer

Text & HTML   **Image**

An Image form item allows you to add an image to your form, i.e. your school logo.

FormHeaderTable1

Table15

### File Upload

This allows you to add field so users can attach files to a form.



## Rearranging Form Items

To rearrange form items, make sure that you are on the form designer view, click on the item that you would like move and drag it to the new position on the form.

## Preview Form in Progress



Either to preview your form while you are building it click the Preview form as PDF or the **Preview Form in Browser** button located above the Form Designer window.

Once you are satisfied with your form, click the home button to return to your department folder.

## Publishing Your Form

To publish your form you must first click the Activate the Form button in the action panel on the right side of the form in the dashboard



Next you will click the URL button in the action panel on the right side of the form in the dashboard. This will open up a window containing your URL.



	0	0	Action ▼
	0		Edit form template
	0		Deactivate form template
	0		Copy form template
	0		Url Instructions
	0		View Audits
	0		Delete form template
	0	0	Action ▼

### URL Instructions ✕

This screen shows the URL options (web links) which you or your IT personnel will need to post to your website in order for someone to access and complete this form from the internet.

**Form Template:**  
Application for a Degree-Graduation

**For Non-Single Sign On Forms:**  
<https://dynamicforms.ngwebsolutions.com/Submit/Start/df0cad73-10b3-4242-90c2-754744e5bce3?SSO=N>

**For Single Sign On Forms:**  
<https://federation.ngwebsolutions.com/sp/startSSO.ping?PartnerIdpid=https://hancockcollege.onbio-key.com&TargetResource=https%3a%2f%2fdynamicforms.ngwebsolutions.com%2fSubmit%2fStart%2fdf0cad73-10b3-4242-90c2-754744e5bce3>

Close

**If this form is *not* internal**, you can copy and paste this form URL into a hyperlink where you would like this form to be accessed from, or send it to the web team to be added as an iframe into a page on your website.

**If this form *is* internal** you will need to add the following url sting to the beginning of the URL generated by dynamic forms before sharing or posting this link to your website.

## Accessing Form Responses

Once your form has a submission you can access the submissions from the dashboard by click on the numbers in the appropriate column to the right of your form name.

Reject	Multi	Pending	Processed	Archived
0	0	0	0	0
1	9	44	0	0



Action	PDF	HTML	Audit	Form Status	Submit Date ↓	ESign Date	ESigned By	Is Processed	Is Image Processed	HomeFileUp...	EmailAddress3	PhoneExtension3	D
Actions ▾				Deleted	11/17/2022 8:59:57 AM	11/17/2022 8:58:05 AM	Pamela Storie			<a href="#">View</a>	pstorie@hancockcollege.edu	3363	U
Actions ▾				Processed	11/16/2022 3:51:52 PM	11/16/2022 3:46:10 PM	Dorine Mathieu				dmathieu@hancockcollege.edu	3446	M
Actions ▾				Processed	11/16/2022 11:41:41 AM	11/16/2022 11:41:37 AM	Lilian Ojeda			<a href="#">View</a>	lojeda@hancockcollege.edu	3645	E
Actions ▾				Processed	11/10/2022 1:57:49 PM	11/10/2022 1:57:43 PM	Stephanie Alvarado				stephanie.alvarado@hancockcollege.edu	3489	C

From this menu, you can scroll through all submission entries in a table view.

You can also view a pdf or html version of each completed from by clicking on the corresponding icon to the left of the submission you would like to view.



You can also export all form submissions to an excel file by clicking on the Export to Excel button located on the top right corner of the submissions table.

**Congratulations!**

**You have just built your first Dynamic Form.**