Dynamic Forms
User Manual
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Overview

Dynamic Forms (https://dynamicforms.ngwebsolutions.com) is a fully hosted, powerful web application which also allows non-technical users to take any paper-based form and quickly build a sophisticated interactive form that can be published to the internet.

Dynamic Forms provides single and multiple electronic signature functionality along with a basic workflow feature to enable document processing. Its data/image exchange feature allows users to transfer the data captured on your forms into your SIS and/or imaging system in an automated fashion.

Dynamic Forms is an affordable way to realize tremendous savings at your institution by decreasing print, postage, processing and reprocessing costs. Its feature-rich process also allows clients to portray a more sophisticated, technology focused presence on the web for their institution.

System Requirements

To use Dynamic Forms, users need only use one of the four main web browsers, including Microsoft Internet Explorer, Firefox, Safari and Chrome. Next Gen will support versions of these browsers until they are two or three versions old. Also, Next Gen will do a prudent job of keeping track of the latest Beta and New releases of these browsers; however, we will have a specific schedule as to when certain browsers are supported.

Also, for users to view their Dynamic Forms in a PDF format, they will need Adobe Reader 6.0 or higher.
**Site Administrator**

**Introduction**

As a site administrator, you are responsible for setting up your site’s organizational structure. The flexibility and power provided by Dynamic Forms allows you to implement strict security levels across your organization, while also allowing separate business units to maintain and control their own forms and data.

A Next Gen Web Solutions installation specialist will be available to help you set up your structure. You can contact Next Gen support via email at ngsupport@ngwebsolutions.com

**Single Institution Model**

In the **Single Institution Model**, the school administrator is responsible for adding the different business units as outlined above. The administrators within those units can then control the user access within their own departments.
Adding an Organization

Click the **Org Admin** tab to display the **Organization Admin** page. To add a new organization, click the **+ Add new organization** link. The **Organization Details** page displays.

On the **Organization details** page type in the name of the organization in the **Name** field. If your school is using SSO please input the link to get to your dynamic forms site in the New Form Email Return URL field. If your school is not using SSO you can leave the default address that is currently listed.

To save the organization you just created, click the **Save new organization** button.
After you click the Save new organization button, the **Organization saved** page displays.

Then click on the **Back** button to go to the organization admin page, you must then click on the red circle below active to make the new organization live.
If you have subscribed to the multi-signature, SSO, or Payment features of Dynamic Forms, you will then need to enable those features for each organization you set up.

Simply go to the Organization Admin tab and then click on red circles as shown below.

SSO and/or Payments are reserved for schools using the Single Sign On and/or Payments features and should not be activated without completing SSO and/or Payments Testing.
Adding a User

Once your organization structure is in place, you can begin to add users and building forms.

Instruct your users to create an account on the Dynamic Forms Login page by clicking the Create Account button. The Create Account page displays.

On the Create Account page, complete all of the fields, and then click the Submit button. The Account creation complete page displays.
Create Account

Our enrollment process is fast, easy, and secure. Once enrolled, you will immediately have convenient online access to complete required forms, view pending forms, and review your completed forms history.

Please complete all of the information below.

Username:

Password:

Confirm password:

First name:

Last name:

E-mail address:

Confirm e-mail address:

Secret question:

Secret question answer:

Create Account
The **Account creation complete** page instructs the user that the account has been created.

![Account creation complete page](image)

Thank you.

Your account has been created.

[Login to Dynamic Forms](image)
Once the new user has created their account, the site admin must log into Dynamic Forms, and assign that user to an organization. Once logged in, click the User Admin tab. Then click on **Find an existing user to add to your organization** button circled below.

Now enter the user name you would like to add and click the Find User button.

Double check the first name, last name, and email address and then click the Add User button circled below.
You will then see that the user was successfully added. Now you can click on the Manage this User button to give them the correct access to one or several organizations.

*Note that whatever level of access you grant users for one organization, it will be the same for the other organizations to which they have access.*

Here is a chart showing the different user types available.

<table>
<thead>
<tr>
<th>User Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forms Administrator</td>
<td>Allows the user to view submitted forms within the organizations they are assigned</td>
</tr>
<tr>
<td>Edit Forms</td>
<td>Allows the user to add forms, edit forms and delete forms with the organizations they are assigned</td>
</tr>
<tr>
<td>Manage Users</td>
<td>Allows the user to add and edit users with the organizations they are assigned</td>
</tr>
<tr>
<td>Manage Organizations</td>
<td>Allows the user to add and edit organizations</td>
</tr>
<tr>
<td><em>Special – Exchange User</em></td>
<td>Allows the user to utilize the Dynamic Forms Exchange tool – given as needed</td>
</tr>
</tbody>
</table>

The above chart also appears when you are editing a user.
On the manage user’s page there are a few fields to complete. First choose the role or roles you would like this user to have. Reference the chart to give correct access. If you are the admin of more than one institution you can give the user access to those other institutions as well. Then click the **Done** button to complete the process.

You can then make a user active, reset the user’s password, or edit the user’s roles or institutions by clicking on the buttons circled below.
Changing a Profile

Once the user is logged in, they can update their profile at any time by clicking the Change Profile link located in the top right corner of the screen.

There are three types of information that can be changed: username/password, secret question, and demographics. To modify your profile information, select the tab that corresponds to the information you wish to change. Add or change the information then click the Save changes button.
Home Page Navigation

Throughout Dynamic Forms there are navigation tabs located at the top of each page, which are used for navigation purposes. These tabs include:

- **Home** - Displays a list of all forms, including **Multi-Signature**, **Pending** and **Processed** forms, and **Archived** forms. It also displays a **Recent Updates** section that provides users with product release notes and other information.

- **Search** - Allows users to take advantage of the **Search** functionality within the **Dynamic Forms** application.

- **User Admin** - Allows users to control who within the organization has access to the administrative functions. **Only User Admins can use this tab**

- **Organization Admin** - Allows users to create, edit, and delete organizations. **Only User Admins can use this tab**

- **Reports** - Allows users to view school activity. **Only User Admins can use this tab**

- **Help** - This page contains a link to a .PDF of this Screen User Guide document, as well as contact information for additional support.
**My Forms**

There are additional options in the top right of your screen. Update profile allows you to change your password and logout will do just that. If you click on My Forms, you will then be taken to the following screen.

This is very handy should you also be submitting forms as part of your role. Pending Forms will allow you to see a list of forms that are awaiting your signature, for example. Perhaps you have been listed as a co-signer by a student, you will see that form listed.

In addition, Forms History will show you all forms that you have previously submitted.

Manage Account offers the same functionality as update profile on the administration screens. To return to the admin pages, simply click on
Forms Search

The Form Search tab is used to search for specific records. This allows users to choose one or more forms to search, a field within the form(s) to search, and a specific value on which to search.

To search your forms database, simply select from the drop down list any form(s) you want to include in your search and click Next.

You can select more that one form my using your ctrl key and your mouse. You can also select all forms by simply clicking on Select All.

Then, select the field you would like to search and click Next. You may notice that the list of available fields is limited to only those fields associated with the form(s) you selected in the previous step.
Next, simply select the field you wish to search by. It is important that you are consistent in how you name fields across different forms.

For example, you should always use the same name for fields that you wish to search by.

e.g.

StudentLastName

StudentSchoolID

*Note:* When searching for a check box value, use True as a value to locate records that are checked, and False to search for unchecked boxes.
Finally, enter the value* for which you wish to search and click **Search**. Dynamic Forms will return the search results in the bottom half of the window.

**Note:** To search for an exact value, such as the last name Smith, enter the full text string *Smith* in the **Value to search** field. To search for a partial value, simply enter one or more letters into the **Value to search** field. The search tool will perform a wildcard search and return any value containing the letter(s) you entered.

In order to search forms in the data warehouse, ensure you check the box highlighted. The data warehouse includes all forms that are older than 12 months.
Search results are displayed at once, along with some basic information such as the form name and the date submitted. From this screen you can choose to mark the form as **Processed** (green) or **Unprocessed** (red) by clicking on the colored circle in the **Processed** column. You may also view the PDF/HTML version of the form.
Retrieving Your Data

The Home tab displays a list of all of the forms. Each form contains three columns, Pending, Processed, and Archived. If you subscribe to the multi-signature feature, you will also see the Multi-Signature queue.

Multi-Signature Queue

Forms with multiple-signatures but no school section

If a student has submitted their section of the form but the parent has not, that form will appear in the Multi-Signature queue. Once the parent completes and signs the form, the form will go to the pending queue.

Forms with multiple-signatures and a school section

If a student has submitted their section of the form but the parent has not, that form will appear in the Multi-Signature queue. If both student and parent have completed their sections of the form, but the form is still waiting for the school section to be completed, that form will appear in the Multi-Signature queue. Once the school section has been completed, the form will move to the processed queue.

Pending Queue

Forms with a single electronic signature will appear in this queue once they have been submitted. Multiple signature forms without a school section will also appear in this queue once all signatures have been completed on the form.

Processed Queue

Forms with a School use only section will automatically move to this queue once the school use only section has been completed. Forms without a School use only section must be moved manually to this queue.

Archived Queue

Forms are manually moved to the Archived Queue. Click here for more details.
To view the data for pending forms, click on the number link located in the Pending column.
For the **School Application** form shown below, **Dynamic Forms** displays the PDF and HTML version of the form. The user can scroll to the right to see the rest of the form’s data.

View PDF  
To view a .pdf image of the form as it was completed by the student, click on Adobe logo in the **PDF** column. This opens a .pdf file that can be saved or stored in an imaging system.

View HTML  
To view an .html page of the form as it was completed by the student, click on page icon in the **HTML** column. This displays the form data in .html format in a different browser.

Process form(s)  
Once the data has been processed in your office, select the check box, and then click the **Process selected forms** button. This moves the form to the **Processed** queue.

The **Processed** queue has similar functionality. If a form needs to be revised or if it was moved into a processed status inadvertently, simply check the same box, and then click the **Pend selected forms** button. The form is moved back to the **Pending** queue.
Delete form(s)
It may be necessary to delete a form. The most common reason for deleting a form is so that a user can re-submit an e-sign form that has been set up for duplicate e-signature prevention (for more information about this, refer to Updating a Form’s Characteristics). To delete a form, simply select the checkbox beside the form in question, and click the Delete selected forms button.

Archiving Forms

Processed and Pending forms can be moved into an Archive queue at any time. The system can also be used to archive all forms that are older than 60 days, 90 days, or 120 days.

To archive a form, select the check box for the form you want to archive, and then click the Archived selected items button.

To archive all forms that are greater than 60 days, 90 days, or 120 days, simply select the day range from the drop-down list, and then click the Archive old forms button.

When forms are archived, the number of Archived forms displays with the number of Multi-Signature, Pending and Processed forms on the Home tab.
You can click on the **Export to Excel** button to create an excel file with all the form data.
**Reporting**

Dynamic Forms allows Administrators (3000 level only) to view the number of forms submitted for a given date range, as well as generate .PDFs for the reports.

To generate activity reports, click the **Reports** tab.
The School Activity page displays a Start date field and an End date field. Complete these fields with the data range you want and click the Run report button.
After you click the **Run report** button, the system generates a report displaying the number of forms submitted for the date range you selected.

To generate a .PDF of the report, click the **View PDF version of report** link.

![School activity](image)

<table>
<thead>
<tr>
<th>Name</th>
<th>Forms Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>NextGen DForms</td>
<td>0</td>
</tr>
<tr>
<td>NextGen DForms - Financial Aid</td>
<td>1</td>
</tr>
<tr>
<td>NextGen DForms - Registrar</td>
<td>0</td>
</tr>
<tr>
<td><strong>GRAND TOTAL</strong></td>
<td><strong>1</strong></td>
</tr>
</tbody>
</table>