

Dynamic Forms

Release 10.1 – Release Notes

Release 10.1 Summary

- Appointment and Events (free upgrade)
- API Changes
 - Sharing Library
 - Static Tables
- Other New Features
 - Improvements to the Dynamic Forms User Portal
 - Texting now available for Rejected/Returned Forms
 - Added support for Nelnet's Campus Commerce product

Release 10.1

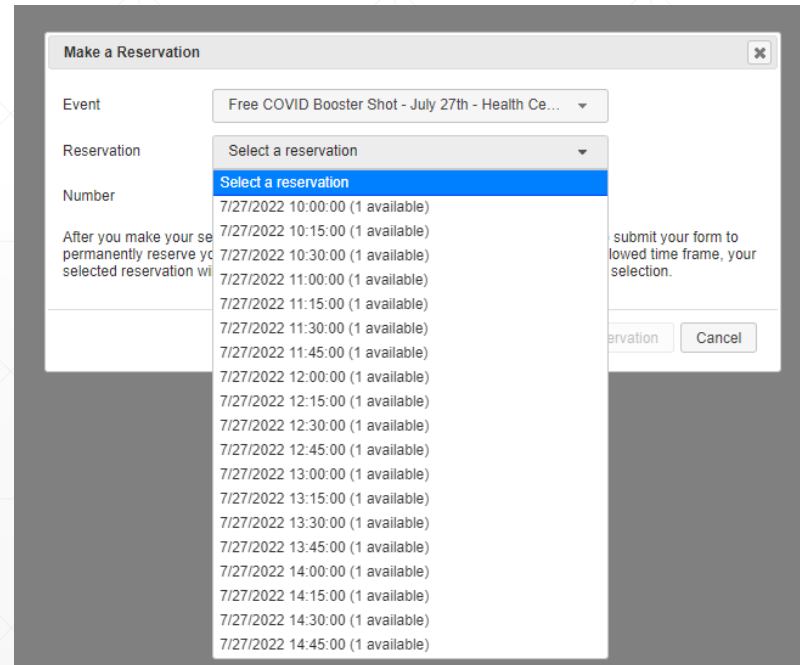
Appointments & Events

New Enhancements

What is a Dynamic Forms Appointment?

Allows a user to schedule a specific time and place for meeting/action.

In the example below, a user is selecting a time to receive a free COVID Booster shot. Appointments can be used for many things including parent school visits, interviews with employers, professor office hours, gym trainers schedules, etc.



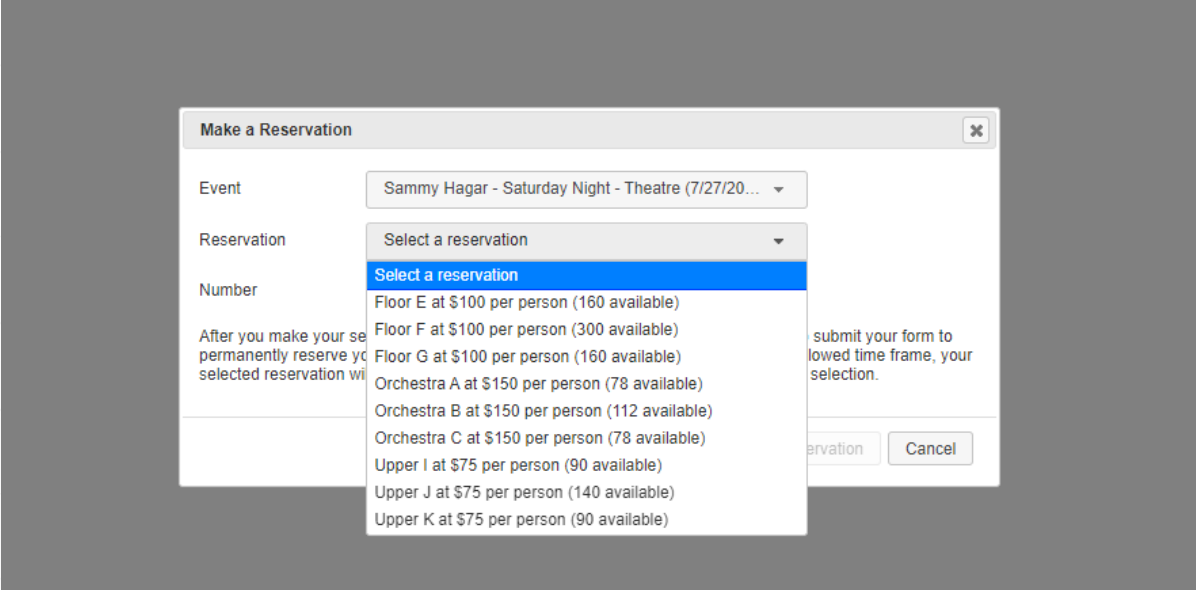
The screenshot shows a web form titled "Make a Reservation". The "Event" dropdown is set to "Free COVID Booster Shot - July 27th - Health Ce...". The "Reservation" dropdown is open, showing a list of available times for 7/27/2022, each with "(1 available)" next to it. The times range from 10:00:00 to 14:45:00 in 15-minute increments. The "Number" field is empty. Below the "Reservation" dropdown, there is a note: "After you make your se permanently reserve yo selected reservation wi". To the right of the dropdown, there is a note: "submit your form to lowed time frame, your selection." and a "Cancel" button.

Reservation
Select a reservation
7/27/2022 10:00:00 (1 available)
7/27/2022 10:15:00 (1 available)
7/27/2022 10:30:00 (1 available)
7/27/2022 11:00:00 (1 available)
7/27/2022 11:15:00 (1 available)
7/27/2022 11:30:00 (1 available)
7/27/2022 11:45:00 (1 available)
7/27/2022 12:00:00 (1 available)
7/27/2022 12:15:00 (1 available)
7/27/2022 12:30:00 (1 available)
7/27/2022 12:45:00 (1 available)
7/27/2022 13:00:00 (1 available)
7/27/2022 13:15:00 (1 available)
7/27/2022 13:30:00 (1 available)
7/27/2022 13:45:00 (1 available)
7/27/2022 14:00:00 (1 available)
7/27/2022 14:15:00 (1 available)
7/27/2022 14:30:00 (1 available)
7/27/2022 14:45:00 (1 available)

What is a Dynamic Forms Event?

Allows a user to sign up for (or purchase) one or more accesses for an experience at a specific venue.

In the example below, a user is purchasing tickets to a concert at a school theatre. Money does not need to be part of an event. Events can be things like limited seating lectures, school outings, etc.



The screenshot shows a web form titled "Make a Reservation" with a close button (X) in the top right corner. The form has three main sections: "Event", "Reservation", and "Number".

- Event:** A dropdown menu is open, showing "Sammy Hagar - Saturday Night - Theatre (7/27/20..." as the selected option.
- Reservation:** A dropdown menu is open, showing "Select a reservation" as the selected option. Below this, a list of reservation options is displayed, each with a price and availability:

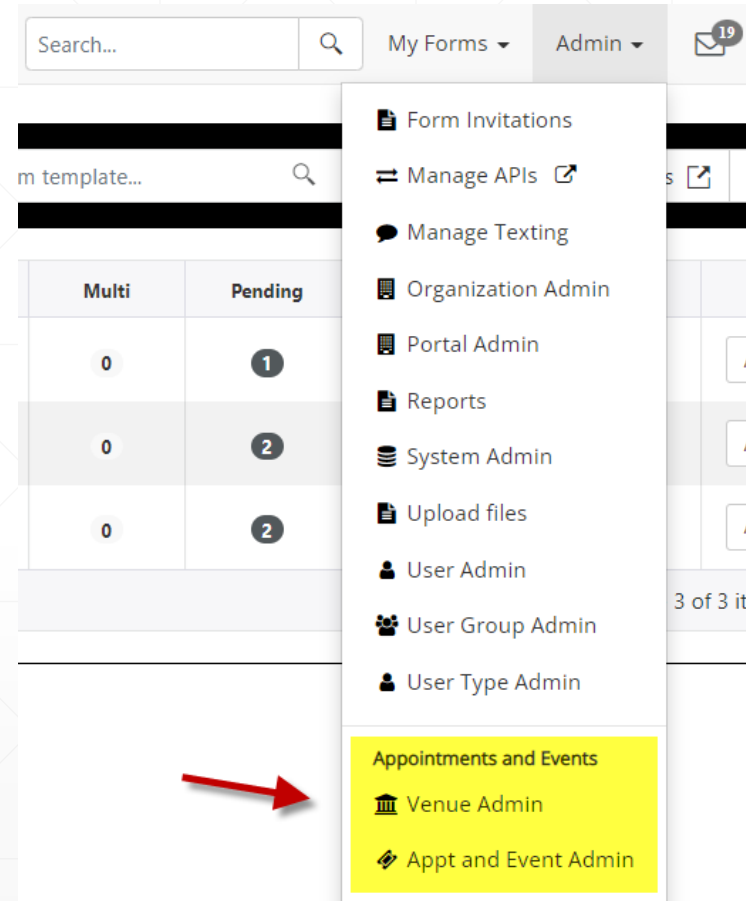
Reservation Option	Price	Availability
Floor E	\$100 per person	160 available
Floor F	\$100 per person	300 available
Floor G	\$100 per person	160 available
Orchestra A	\$150 per person	78 available
Orchestra B	\$150 per person	112 available
Orchestra C	\$150 per person	78 available
Upper I	\$75 per person	90 available
Upper J	\$75 per person	140 available
Upper K	\$75 per person	90 available

Below the reservation options, there is a "Reservation" button and a "Cancel" button. To the right of the reservation options, there is a text prompt: "submit your form to lowered time frame, your selection."

New Admin Menu Options

Appointments and Events Management can be found as a new item on the main menu Admin dropdown.

Venues are the places where Appointments and Events take place (stadium, theatre, classroom, etc.) and there is a separate Admin page for Venues also.



Venues

New Enhancements

Venues

Before starting to use Appointments or Events, you will want to create the places where either of these things will take place – Venues.

Here we have created five venues.

Maybe we have a famous artist coming to speak with limited seating in the Arts School and they will be speaking in Room 203.

Or a performance of ***Stomp*** will be coming to the college and the Theatre will be used.

Venue Admin

Venues	
Active	Venue Name
Yes	Boardroom - Business School - 320
Yes	Classroom - 203 Arts School - U shape
Yes	Classroom - 209 Science School - Standard
Yes	Health Center - Room 8
Yes	Theatre

Venues

Venues are easy to create:

Step 1: Name the venue

Classroom - 203 Arts School - U shape

Details

Image

Sections

Name

Classroom - 203 Arts School - U shape

Update Venue


Step 2: Provide a picture of the venue, if desired

Details

Image

Sections

☐ Use venue image



Venue Image

Choose your file...

Update Image

Step 3: Detail the capacity of the venue and if there are different sections or even specific seats that you want to allow people to choose.

Classroom - 203 Arts School - U shape

Details

Image

Sections

Venue Sections

Venue sections identify the seating sections that are available for events, appointments, and the capacity within each section. You must have at least one section per venue.

+ Add new section

Name	Capacity	Actions
U Shape	13	<div>Edit</div> <div>Delete</div>

1

↻

Venues

For something like a theatre, Admins are able to add Venues with sections that have individual capacities in each section for users to choose.

Dynamic Forms will keep track of the available capacity and not oversell each of the different sections.



















Theatre





DetailsImageSections


Venue Sections

Venue sections identify the seating sections that are available for events, appointments, and the capacity within each section.
You must have at least one section per venue.

+ Add new section

Name	Capacity	Actions
Floor E	160	 Edit  Delete
Floor F	300	 Edit  Delete
Floor G	160	 Edit  Delete
Orchestra A	78	 Edit  Delete
Orchestra B	120	 Edit  Delete
Orchestra C	78	 Edit  Delete
Upper I	90	 Edit  Delete
Upper J	140	 Edit  Delete
Upper K	90	 Edit  Delete

  1  



Appointments

New Enhancements

Appointments

From the Main Menu, Appointments can be found under the Appointments and Events Admin selection.

Here, the Admin user will see all Appointments and Events that have been created. To the right, the Type will show if the entry is either an Appointment or an Event along with any Orders that have been taken (we'll get to that later).

Appointments and Events				
		Search in appointments and events...		Create new appointment or event
Active	Name	Type	Orders	Action
Yes	Free Booster Shots	Appointment	2	Action
Yes	Sammy Hagar Concert	Event	4	Action
Yes	Traffic School	Event	2	Action
1 50 items per page		1 - 3 of 3 items		

Creating a New Appointment

To create a new Appointment (or Event) click this button...

Appointments and Events				
		Search in appointments and events...		Create new appointment or event
Active	Name	Type	Orders	Action
Yes	Free Booster Shots	Appointment	2	Action
Yes	Sammy Hagar Concert	Event	4	Action
Yes	Traffic School	Event	2	Action
1 50 items per page 1 - 3 of 3 items				

Then provide the name of the Appointment and be sure to choose that it is an Appointment rather than an Event. In this example, we are creating office hours for a professor.

Add New Appointment or Event

Name

Professor Grace's Office Hours

Type

Appointment

Appointment

Event

Appointments - Details

Appointment - Professor Grace's Office Hours

Details Scheduled Appointments Organizations Custom Fields

Name

☒ Include calendar invite on confirmation email

Maximum number the user can choose per time slot

Time limit to submit order (in minutes)

Appointment Title

Seats Title

Numbers Title

Update

After you have named your Appointment, you will have four sections or tabs that allow you to customize how users interact with your appointment.

Details:

1. You can check the option to send a calendar invite to the user selecting an appointment time.
2. You can allow a user to select one or more appointments. Meaning you can limit the user to a single time slot or they can select multiple time slots.
3. You can limit the time that a user has to select a time slot – time will expire on their selection. For example if there are limited slots and slots are in high demand.

Appointments - Details

Appointment - Professor Grace's Office Hours

Details

Scheduled Appointments

Organizations

Custom Fields

Name

Professor Grace's Office Hours

☒ Include calendar invite on confirmation email

Maximum number the user can choose per time slot

1

Time limit to submit order (in minutes)

15

Appointment Title

Meeting:

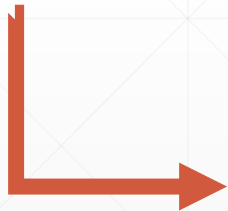
Seats Title

Time:

Numbers Title

Number:

Update



Make a Reservation

Meeting:

Select

Time:

Select

Number:

Select

After you make your selection and click the button below, you will have 15 minutes to submit your form to permanently reserve your selection. If your form has not been submitted within the allowed time frame, your selected reservation will be released and you must return to this form to make a new selection.

Cancel

Select This Reservation

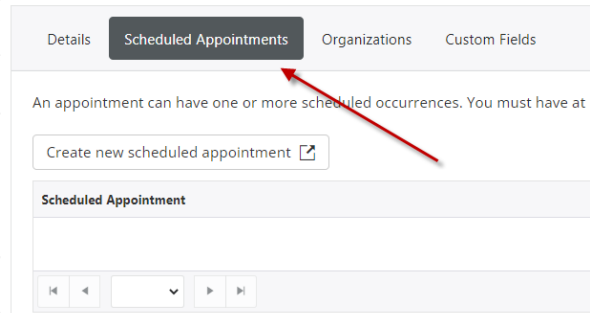
Other Details:

Admins can modify the titles of the Appointment/Event by customizing the titles that the end user will see when completing the form.

1. **Appointment Title** in this example is customized to be “Meeting”. In a concert example, it might be “Night of Performance” or other.
2. **Seats Title** in this example is renamed to Time – time of appointment, it can be Seat in a theatre or size in the case of a T-shirt, etc.
3. **Number Title** – Not customized here – just a title used to describe if one ticket, one seat, one T-shirt or other number of the above are desired.

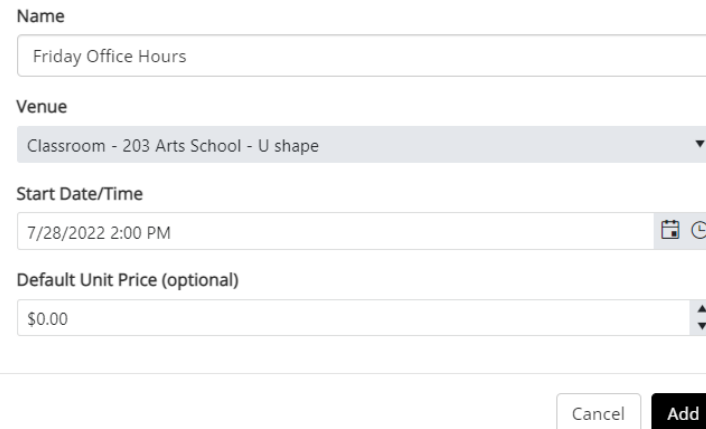
Appointments – Scheduled Appointments

Appointment - Professor Grace's Office Hours



Under Scheduled Appointments – Admins will be able to create the times allow for the Appointments.

Add New Scheduled Appointment



As the Professor might have multiple days Office Hours available with different times, you are now indicating the specific appointment start date, venue and start time for the Office Hours.

Appointments – Scheduled Appointments

The image shows two overlapping web forms. The top form, titled 'Update Scheduled Appointment', has fields for 'Name' (containing 'Friday Office Hours'), 'Venue' (a dropdown menu showing 'Classroom - 203 Arts School - U shape'), and 'Start Date/Time' (containing '7/28/2022 2:00 PM'). It includes 'Cancel' and 'Update' buttons. Below this is a light blue informational box stating: 'All of the sections listed below will be available for online appointments.' The bottom form, titled 'Add New Appointments', is accessed via a 'Create Appointments' link with an external icon, indicated by a red arrow. It features a '+ Add new record' button and a 'Reservation Start Time' selector. The main section contains fields for 'First Appointment' and 'Last Appointment' (both with clock icons), 'Minutes Between Appointments' (a numeric input set to 30), 'Appointments per Time Slot' (a dropdown set to 1), and 'Unit Price for Appointments (optional)' (a dropdown set to \$0.00). It also has 'Cancel' and 'Add' buttons.

Once the Admin has established the specific Appointment, now they can add the details related to the Appointment:

- First Appointment: When appointments start
- Last Appointment: When the appointments end
- Minutes between Appointments – Dynamic Forms will automatically create appointments based on this interval.
- How many individuals can be taken during that one Appointment time.
- If there is a price for the Appointment.

Appointments – Organizations

After that is complete, the Admin user can define which Dynamic Forms organizations can use this Appointment on a Form. You use the “Select all orgs” checkbox or select individual organizations.

Appointment - Professor Grace's Office Hours

Details Scheduled Appointments **Organizations** Custom Fields

Organizations

Select organizations for which this appointment will be available in the form designer. If no organizations are selected, then this appointment will be available to all organizations.

☒ Select all orgs

Graceland

Total orgs 1

Save

Appointments – Custom Fields

Finally, Admin can create custom fields to ask the user as they are signing up for the appointment.

For instance here, the Professor might want to know the First and Last name of the Student along with their E-mail address if something comes up and the Professor needs to cancel. Also the Professor might want to know which class the student is in if they are teaching several courses.

Appointment - Professor Grace's Office Hours

[Details](#) [Scheduled Appointments](#) [Organizations](#) [Custom Fields](#)

Custom Fields
Custom fields collect data per reservation.


[+ Add new custom field](#)

Name	Actions
Email Address	Edit Delete
Which course you are in?	Edit Delete
Last Name	Edit Delete
First Name	Edit Delete

[⏪](#) [⏴](#) 1 [⏵](#) [⏩](#) [Refresh](#)

Appointments – Example 1

Here is the example of signing up for a half hour session with Professor Grace.



Professor Pierce Grace
"Hello everyone, come visit with me!"

Please select your time to meet: *

Make a Reservation

Event

Friday Office Hours - Classroom - 203 Arts Scho... ▼

Reservation

7/28/2022 4:00:00 PM (1 available) ▼

Number

1 person ▼

Additional Information

Person 1

Email Address

First Name

Last Name

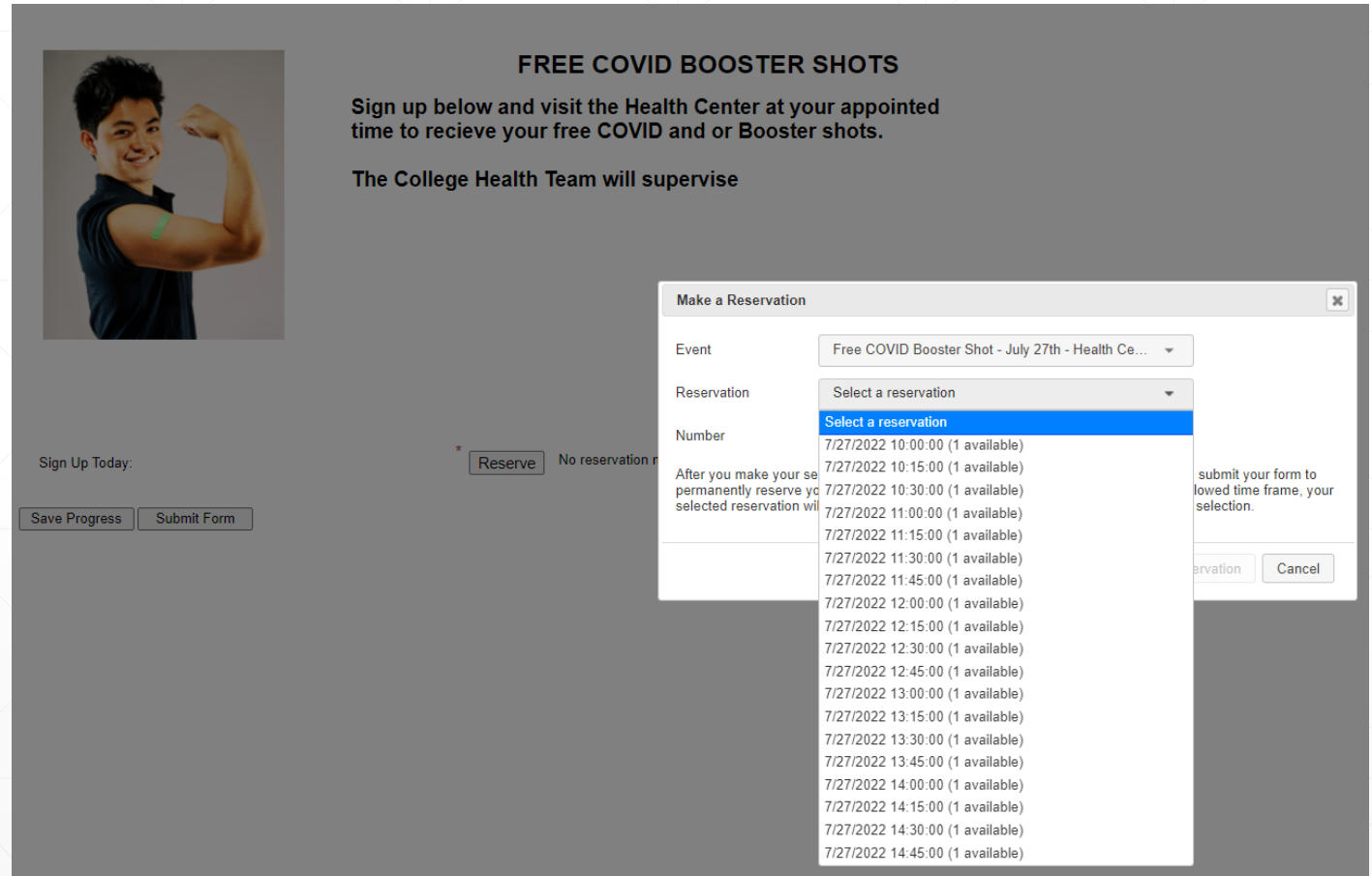
Which course you are in?

After you make your selection and click the button below, you will have 15 minutes to submit your form to permanently reserve your selection. If your form has not been submitted within the allowed time frame, your selected reservation will be released and you must return to this form to make a new selection.

Appointments – Example 2

Need a free COVID Booster?

Sign up today on campus!



FREE COVID BOOSTER SHOTS

Sign up below and visit the Health Center at your appointed time to receive your free COVID and or Booster shots.

The College Health Team will supervise

Sign Up Today:

No reservation

After you make your se permanently reserve yc selected reservation wil

Make a Reservation

Event: Free COVID Booster Shot - July 27th - Health Ce...

Reservation: Select a reservation


Number: Select a reservation

- 7/27/2022 10:00:00 (1 available)
- 7/27/2022 10:15:00 (1 available)
- 7/27/2022 10:30:00 (1 available)
- 7/27/2022 11:00:00 (1 available)
- 7/27/2022 11:15:00 (1 available)
- 7/27/2022 11:30:00 (1 available)
- 7/27/2022 11:45:00 (1 available)
- 7/27/2022 12:00:00 (1 available)
- 7/27/2022 12:15:00 (1 available)
- 7/27/2022 12:30:00 (1 available)
- 7/27/2022 12:45:00 (1 available)
- 7/27/2022 13:00:00 (1 available)
- 7/27/2022 13:15:00 (1 available)
- 7/27/2022 13:30:00 (1 available)
- 7/27/2022 13:45:00 (1 available)
- 7/27/2022 14:00:00 (1 available)
- 7/27/2022 14:15:00 (1 available)
- 7/27/2022 14:30:00 (1 available)
- 7/27/2022 14:45:00 (1 available)

submit your form to lowed time frame, your selection.

Appointments – User Receipt

After signing up the user will be presented with a PDF of their transaction including a Order Number for tracking purposes.




Professor Pierce Grace
"Hello everyone, come visit with me!"

Please select your time to meet: *

	Order: 25
Professor Grace's Office Hours	
Classroom - 203 Arts School - U shape on 7/28/2022 at 3:00 PM (1)	

Appointments – Admin Side

Admins will return to the Appointments & Events Admin page to see the activity in these areas. Admins can click on the number in the Orders column to see the details of the specific Appointment or Event.



Appointments and Events				
Search in appointments and events...		Create new appointment or event		
Active	Name	Type	Orders	Action
Yes	FIRST-GENERATION WORKSHOPS	Event	1	Action
Yes	Free Booster Shots	Appointment	4	Action
Yes	Professor Grace's Office Hours	Appointment	1	Action
Yes	Sammy Hagar Concert	Event	6	Action
Yes	Traffic School	Event	2	Action
1		50 items per page		
		1 - 5 of 5 items		

Appointments – Admin Side

Here we can see each of the different appointment times that have been chosen along with the details of the student who signed up for the appointment (these were the custom fields we added). Also, the Admin can export this list to be processed further or printed as desired.



















Appointment - Professor Grace's Office Hours

[Back to Appointments and Events](#)

Appointment Orders

Search in appointment orders...

Export

PDF	Html	Audit	Order Id	Appointment Name	Appointment Instance	Appointment Time	Venue	Reserved Count	Unit Price	Total Cost	Form	Email Address	First Name	Last Name	Which cour
			25	Professor Grace's Office Hours	Friday Office Hours	7/28/2022 3:00:00 PM	Classroom - 203 Arts School - U shape	1	0	0	A&E - Professor Grace's Office Hours Sign-Up Form	mako@ngwebsolutions.com	Jonathan	Makofske	Comp Sci
			33	Professor Grace's Office Hours	Friday Office Hours	7/28/2022 3:30:00 PM	Classroom - 203 Arts School - U shape	1	0	0	A&E - Professor Grace's Office Hours Sign-Up Form	Jim.Grace@ngwebsolutions.com	Jim	Grace	Math 101
			42	Professor Grace's Office Hours	Friday Office Hours	7/28/2022 4:00:00 PM	Classroom - 203 Arts School - U shape	1	0	0	A&E - Professor Grace's Office Hours Sign-Up Form	Jim.Grace@ngwebsolutions.com	Jim	Grace	Math 101
			63	Professor Grace's Office Hours	Friday Office Hours	7/28/2022 4:30:00 PM	Classroom - 203 Arts School - U shape	1	0	0	A&E - Professor Grace's Office Hours Sign-Up Form	mako@ngwebsolutions.com	Jonathan	Makofske	Comp Sci
			67	Professor Grace's Office Hours	Saturday Office Hours	8/6/2022 1:30:00 PM	Classroom - 203 Arts School - U shape	1	0	0	A&E - Professor Grace's Office Hours Sign-Up Form	samveller@bellsouth.net	Jim	Grace	Math 101
			68	Professor Grace's Office Hours	Saturday Office Hours	8/6/2022 2:30:00 PM	Classroom - 203 Arts School - U shape	1	0	0	A&E - Professor Grace's Office Hours Sign-Up Form	samveller@bellsouth.net	Jim	Grace	Math 101

1 25 items per page 1 - 6 of 6 items

Events

New Enhancements

Events

From the Main Menu, Events can be found under the Appointments and Events Admin selection.

Here, the Admin user will see all Appointments and Events that have been created. To the right, the Type will show if the entry is either an Appointment or an Event along with any Orders that have been taken (we'll get to that later).

Appointments and Events				
		Search in appointments and events...	Create new appointment or event	
Active	Name	Type	Orders	Action
Yes	Free Booster Shots	Appointment	2	Action
Yes	Sammy Hagar Concert	Event	4	Action
Yes	Traffic School	Event	2	Action
1 50 items per page		1 - 3 of 3 items		

Creating a New Event

To create a new Event click this button...

Appointments and Events				
		Search in appointments and events...	Create new appointment or event	
Active	Name	Type	Orders	Action
Yes	Free Booster Shots	Appointment	2	Action ▾
Yes	Sammy Hagar Concert	Event	4	Action ▾
Yes	Traffic School	Event	2	Action ▾
1 50 items per page 1 - 3 of 3 items				

Then provide the name of the Event and be sure to choose that it is an Event rather than an Appointment. In this example, we creating a sign-up for a workshop.

Add New Appointment or Event

Name

First Generation Seminars

Type

Event

Appointment

Event

Events - Details

Event - First-Generation Workshops

Details

Scheduled Events

Organizations

Custom Fields

Name

First-Generation Workshops

☒ Include calendar invite on confirmation email

Maximum number the user can choose per event

3

Time limit to submit order (in minutes)

20

Event Title

Workshops:

Seats Title

Location:

Numbers Title

Number of Attendees:

Update

After you have named your Event, you will have four sections or tabs that allow you to customize how users interact with your Event.

Details:

1. You can check the option to send a calendar invite to the user selecting the event. The form must have an email address selected on it.
2. You can allow a user to select one or more people to attend the event.
3. You can limit the time that a user has to submit the form and register for the event. For example if there are limited seats and seats are in high demand.

Events - Details

Event - First-Generation Workshops

Details

Scheduled Events

Organizations

Custom Fields

Name

First-Generation Workshops

☒ Include calendar invite on confirmation email

Maximum number the user can choose per event

3

Time limit to submit order (in minutes)

20

Event Title

Workshops:

Seats Title

Location:

Numbers Title

Number of Attendees:

Update

Make a Reservation

Workshops:

First-Generation Student Panel - Classroom - 20...

Location:

Select

Number of Attendees:

First-Generation Student Panel - Classroom - 203 Arts School - U shape (8/16/2022 6:00:00 PM)

After you make your selection, you will be redirected to the reservation details page. Once you are on the reservation details page, you can click on the reservation to permanently reserve it. Once you click on the reservation, your selected reservation will be released and you must return to this form to make a new selection.

Testing new Occurance - Classroom - 203 Arts School - U shape (8/6/2022 3:47:00 PM)

Cancel

Select This Reservation

Other Details:

Admins can modify the titles of the Appointment/Event by customizing the titles that the end user will see when completing the form.

1. **Event Title** in this example is customized to be “Workshops”. In a concert example, it might be “Night of Performance” or other.
2. **SeatsTitle** in this example is renamed to Location, it can be Seat in a theatre or size in the case of a T-shirt, etc.
3. **Number Title** – Customized for clarity – Number of Attendees – can be a title used to describe one ticket, one seat, one T-shirt or other number of the above are desired.

Events – Scheduled Events

Event - FIRST-GENERATION WORKSHOPS


Details

Scheduled Events

Organizations

Custom Fields





An event can have one or more scheduled occurrences. You must have at least one scheduled event.

Create new scheduled event 

Scheduled Event

First-Generation Student Panel

Career Exploration

  1  

Update Scheduled Event

Name

First-Generation Student Panel


Venue





Classroom - 203 Arts School - U shape

Date/Time

8/16/2022 6:00 PM

All of the sections listed below will be available for online events.

Name	Capacity	Unit Price	Actions
U Shape	13	\$0.00	 Edit

  1  

Under Scheduled Events – Admins will be able to create the single event or if there are multiple events within the bigger event, those can be created here. In this case, there are two workshops, but on different days and in different rooms.

As show to the left, when editing the specific event, Admin users can define the venue for the event, define the start time for the event and define pricing (if any) for the event along with the venue sections (if any).


Events – Organizations

After that is complete, the Admin user can define which Dynamic Forms organizations can use this Event on a Form. You use the “Select all orgs” checkbox or select individual organizations.

Organizations

Select organizations for which this event will be available in the form designer. If no organizations are selected, then this event will be available to all organizations.

☐ Select all orgs

Filter organizations...

Graceland

Total orgs 1

Save

Events – Custom Fields

Finally, Admin can create custom fields to ask the user as they are signing up for the event.

For instance here, the college Department providing the Workshop might want to know the First and Last name of the Student along with their E-mail address if something comes up and the workshop needs to be cancelled or moved to a different venue. Also the Department might want to know which major the student is signed up for or considering to understand more about First Generation students.

Event - FIRST-GENERATION WORKSHOPS

[Details](#) [Scheduled Events](#) [Organizations](#) [Custom Fields](#)

Custom Fields

Custom fields collect data per reservation.

[+ Add new custom field](#)

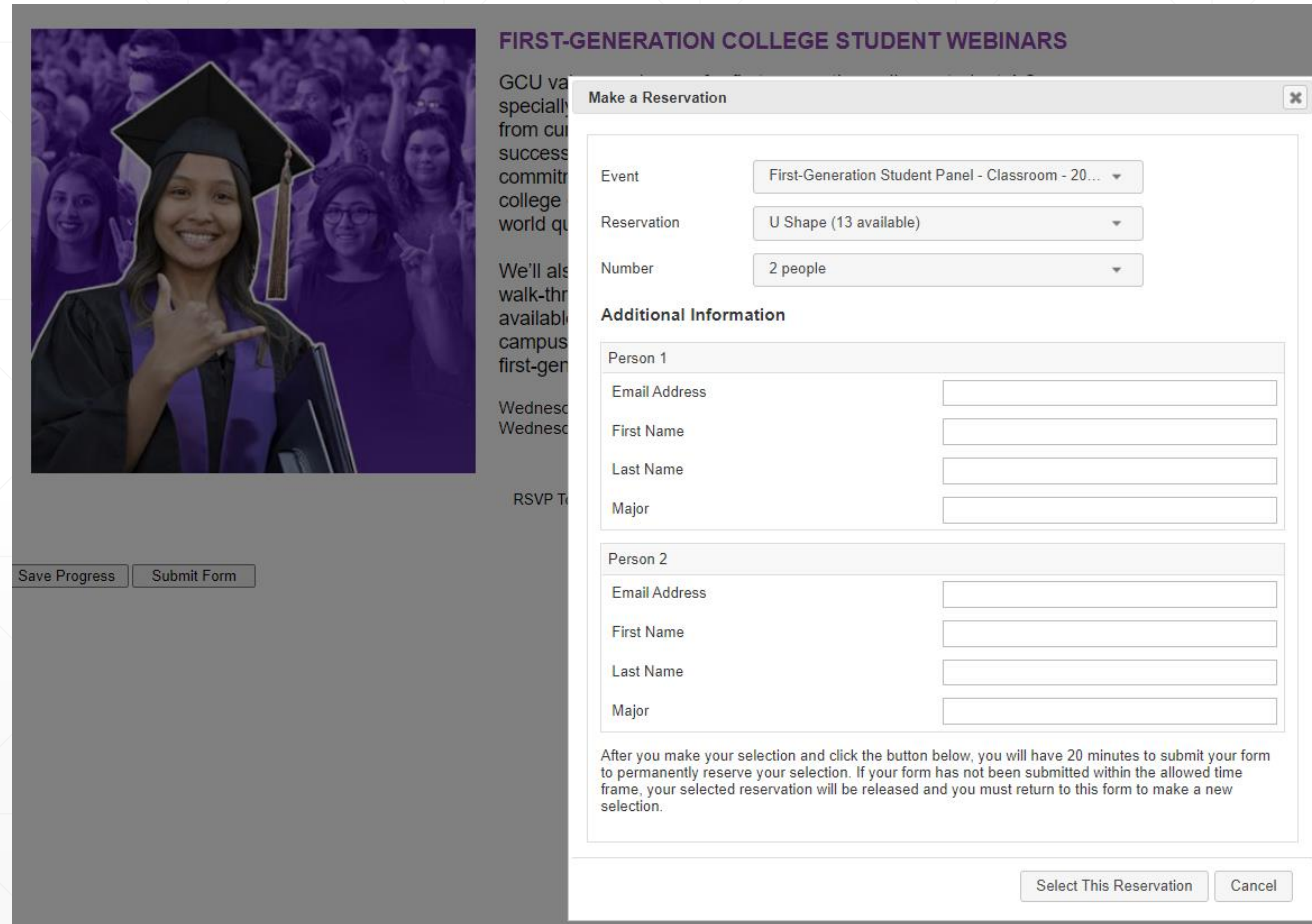
Name	Actions
Major	Edit Delete
Email Address	Edit Delete
Last Name	Edit Delete
First Name	Edit Delete

[⏪](#) [⏴](#) [1](#) [⏵](#) [⏩](#) [Refresh](#)

Events – Example 1

Here is a look at the event we created – First Generation students signing up for a workshop.

We are collecting the custom fields on this event as well.



The screenshot displays a web application interface for "FIRST-GENERATION COLLEGE STUDENT WEBINARS". On the left, there is a purple-tinted image of a smiling female student in a graduation cap and gown. To the right of the image, text describes the event: "GCU va speciall from cu success commit college world q", "We'll als walk-thr availab campus first-gen", and "Wednes Wednes". Below this text are two buttons: "Save Progress" and "Submit Form".

The main content area features a "Make a Reservation" modal window. This window includes the following fields:

- Event:** A dropdown menu showing "First-Generation Student Panel - Classroom - 20..."
- Reservation:** A dropdown menu showing "U Shape (13 available)"
- Number:** A dropdown menu showing "2 people"
- Additional Information:** Two sections, "Person 1" and "Person 2", each containing four input fields: "Email Address", "First Name", "Last Name", and "Major".

At the bottom of the modal, there is a paragraph of text: "After you make your selection and click the button below, you will have 20 minutes to submit your form to permanently reserve your selection. If your form has not been submitted within the allowed time frame, your selected reservation will be released and you must return to this form to make a new selection." Below this text are two buttons: "Select This Reservation" and "Cancel".

Events – Example 2

Now for the fun stuff!! Here is an example of signing up for one of the weekend shows to see the Red Rocker Sammy Hagar at the college theatre.

Make a Reservation

Seat Numbers in
BLACK
Row Numbers in
BLUE

STAGE

C

B

A

G

F

E

K

J

I

PRIVATE
MOTORCOACH
ENTRANCE

BALCONY

Event

Sammy Hagar - Saturday Night - Theatre (7/27/...

Reservation

Select a reservation

Number

Select a reservation

Floor E at \$100 per person (160 available)

Floor F at \$100 per person (300 available)

Floor G at \$100 per person (160 available)

Orchestra A at \$150 per person (78 available)

Orchestra B at \$150 per person (112 available)

Orchestra C at \$150 per person (78 available)

Upper I at \$75 per person (90 available)

Upper J at \$75 per person (140 available)

Upper K at \$75 per person (90 available)

After you make your se
submit your form to per
submitted within the all
you must return to this

to
and

Select This Reservation













Cancel

Events – Admin Side

Like Appointments, Event Orders can be found in the under the A&E Admin screens. Clicking into the orders, we can see all of the Sammy orders and the individual sections/seats that were purchased.

Event - Sammy Hagar Concert

[Back to Appointments and Events](#) ↩

Event Orders												
Search in event orders... <input type="text"/> <input type="button" value="Export"/>												
PDF	Html	Audit	Order Id	Event Name	Event Instance	Event Time	Venue	Venue Section	Reserved Count	Unit Price	Total Cost	Form
			18	Sammy Hagar Concert	Sammy Hagar - Saturday Night	7/27/2022 8:00:00 PM	Theatre	Orchestra B	4	150	600	A&E - Sammy Tickets
			19	Sammy Hagar Concert	Sammy Hagar - Saturday Night	7/27/2022 8:00:00 PM	Theatre	Orchestra B	4	150	600	A&E - Sammy Tickets
			40	Sammy Hagar Concert	Sammy Hagar - Sunday Night	7/31/2022 9:00:00 PM	Theatre	Boardroom	1	0	0	A&E - Sammy Tickets
			41	Sammy Hagar Concert	Sammy Hagar - Saturday Night	7/27/2022 8:00:00 PM	Theatre	Floor E	2	100	200	A&E - Sammy Tickets

Enhancements to Portal

New Enhancements

Portal Enhancements

More great things for the Portal! Remember there are currently four sections on the portal:

- Right hand side shows any forms you want the target audience to see – for example if a faculty member logs in, they might see HR, other forms
- Bottom left is all forms that are in progress for the user

Top Right on the Portal shows all forms currently assigned to the user.

Forms can be assigned to a User by a single for assignment in batch and via API. With this release we added some more functionality to the API assignments.

Monster's U Forms

Assigned To Me 1

Search assigned forms...

Test 1
Sandbox

Fill out form

1 - 1 of 1 items

Pending Action 102

ETO Tracking Form_New 06/21/22 **INCOMPLETE**
Next Gen - ETO
This form is waiting for your signature.

Supplemental Application for Admission of Students in Grades K-12 v.2 Next Gen Copy **PENDING**
LAPC - K-12 Dual Enrollment
You signed the form on 7/21/2022 4:46:02 PM but other signatures are pending.

2022-2023 Adult Education Registration Form - Original Template **PENDING**
South Carolina Department of Education
You signed the form on 6/15/2022 10:45:51 AM but other signatures are pending.

VPN Access Request - *do not use* Jess Working version **INCOMPLETE**
UNCSA - Information Technology
This form is waiting for your signature.

VPN Access Request - *do not use* Jess Working version **PENDING**
UNCSA - Information Technology
You signed the form on 6/9/2022 10:23:06 AM but other signatures are pending.

View All Pending Forms | View Forms History

Other Forms 2

Search other forms...

Financial Aid

Admissions

Manage Portal Functionality

When the Portal Admin Edits the Setting on the specific portal, we have expanded the API setting as shown below. In this example, we are looking to pull form requirements for students in two unique Aid Years. You can pull from one year or both years depending on your need.

Portal Details

Org Selection

API

Portal Assignment API

Create new API

Name	Is Active	Action
Aid Year 22-23	Yes	Actions ▾
Aid Year 21-22	Yes	Actions ▾

⏮ ⏪ ⏩ ⏭

🔄

Editing the APIs

For example, on this School Portal, when the User logs in, an API will call back to the schools information system (Ellucian, PeopleSoft, etc.) and look for any forms that are required for the user and match them to the Dynamic Forms and place them in the “Form Assignments” area for the User to see.

Forms are kept in sync by Dynamic Forms and the School Information System talking to each other either via the User completing the form here or via the next time the User logs into the Portal.

Edit Assignment API

Name

Aid Year 22-23

Is Active?

☒

Multiple Records?

☒

User Type

Student × Staff ×

Error Notification Email

jim.grace@ngwebsolutions.com

School

MonstersU

Data Set

Requirements

Document Id Field

RequirementCode

Required Field

StatusCode

Due Date Field

Select field...

Criteria

Input Field	Source	Value	Commands
AidYear	I will enter value	2223	Edit
Id	User Profile	StudentID	Edit

1

Close

Save

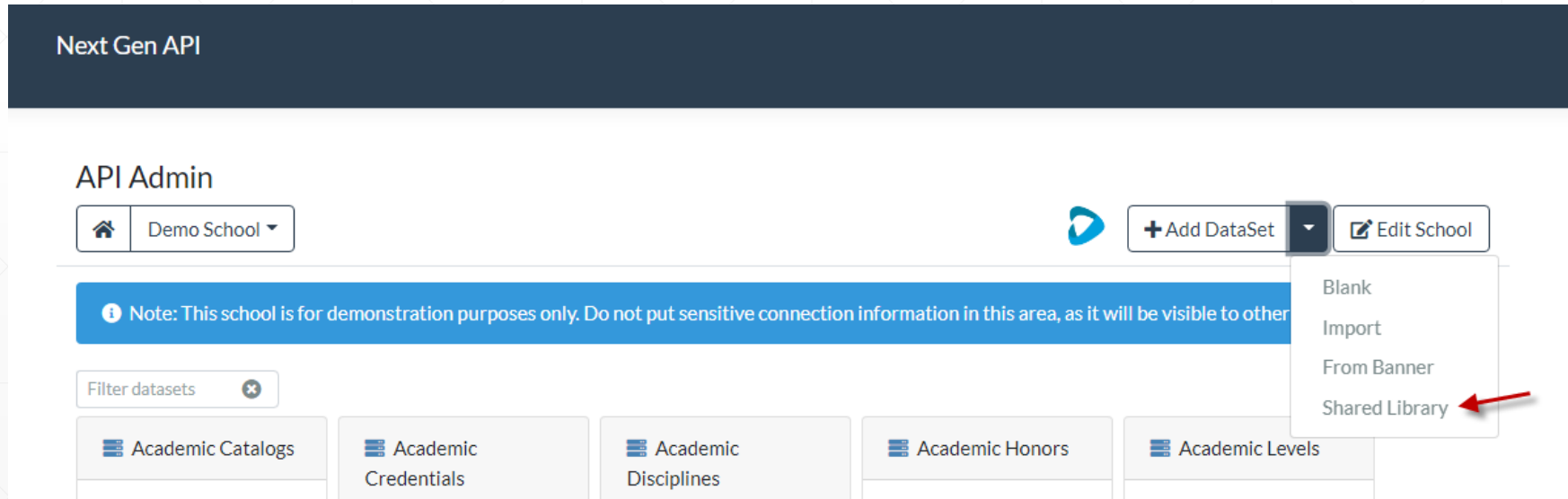
API Changes 1

Sharing Library

API Library and Sharing APIs

If you are an API Admin, you might have noticed a new option in the “Add DataSet” dropdown – Shared Library! **Usage and Participating in this feature is 100% optional.**

With the tremendous growth of API usage across all Next Gen platforms, our clients were asking for help in getting started with or sharing existing APIs. We see similar requests with Dynamic Forms templates – *Can you share your Payroll form?* with us or similar.



API Library

Add Datasets From Banner

Filter

Academic Catalogs ✓
A valid academic catalog is a list that defines the programs and courses that are offered by an organization.

Academic Credentials ✓
An academic credential attests to a qualification, competence, or authority issued to an individual by an educational institution to recognize the completion of a specified course of study.

Academic Disciplines ✓
An academic discipline is a branch of knowledge that is researched and taught as a part of higher education. This entity is used to define academic programs.

Cancel

Save

As many API Admins are aware, we have already built out many if not all of the Ethos APIs in the system, so there already is a library of APIs for clients to use.

But many of the fields in Banner are not translated into Ethos, and there are many other systems PeopleSoft, Workday, and other third party systems that don't fit into this Ethos category.

That's why we creating the API Sharing Library.

API Shared Library

We will be small to start with, but grow rapidly.

The API Sharing Library is a place where Admins can visit and see APIs that have been shared by Next Gen or by other colleges. Imagine you need to push Scholarship Award data in your Banner instance or retrieve data from Peoplesoft to place into a form. We are building out an area where schools who have done this can share their work with other schools that are just starting.

Add Dataset From Shared Library

Filter

Address

Ethos

Shared by: Next Gen

Person

Ethos

Banner

Shared by: Next Gen

Select a dataset from the library to preview its settings.

Cancel

Add

API Shared Library

To use the Sharing Library, simply access the API you wish to share and click on the new Share button on the menu bar.

API Admin

Home Demo School Academic Disciplines

Help Copy Share Delete Test Save

Settings Caching Logs Change History


General Settings

Name Academic Disciplines Description An academic discipline is a branch of knowledge that is researched and taught as a part of higher education. This entity is used to define Type Web Service

Web Settings

Method GET URL https://bannerapi.demoschool.edu/api/academic-disciplines

Authentication Basic Credentials



API Shared Library

Now Dynamic Forms will show the API Admin the settings from the dataset that will be included in the shared version.

Dynamic Forms will automatically remove any settings which are sensitive and show the API Admin all other pieces of information that they might want to remove prior to sharing.

User can also tag the API dataset to make it easier for other API Admins to find – see below for examples.....

Tags

Add tags to make your dataset easy to discover for other users.

Banner X

Database X

Add Tag

Share Dataset

Review the below settings for your dataset. Be sure to edit or remove any potentially sensitive information before sharing. Some sensitive values have already been removed.

General Settings	
Name	Description
Academic Disciplines	
Type	
Web	

Web Settings	
Method	URL
GET	<input type="text" value="https://bannerapi.demoschool.edu/api/academic-disciplines"/>
Authentication	Credentials
Basic	<input type="text" value="[REMOVED]"/>
Headers	
No headers defined.	

Input Values	
No input parameters defined.	

Output				
Format	Is this API returning a collection?			
JSON	Yes			
Fields	Field Path	Field Type	Format	Default Value

Cancel

Share


API Shared Library



Academic Disciplines was successfully shared. A moderator will review and approve it before it appears in the library.

 Help

 Copy

 Unshare

 Delete

 Test

 Save

Dynamic Forms will show the API Admin a confirmation message that confirms that they have submitted the API for the Sharing Library.

To start, the Next Gen API team will review the submissions and make sure they are ready to be shared.

API Shared Library

Next Gen API

API Admin

Home Demo School Academic Disciplines

Help Copy Unshare Delete Test Save

Settings Caching Logs Change History

General Settings


Name Description Type

Academic Disciplines An academic discipline is a branch of knowledge that is researched and taught as a part of higher education. This entity is used to define Web Service

Web Settings

Method URL

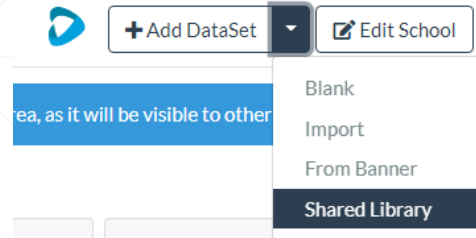
GET https://bannerapi.demoschool.edu/api/academic-disciplines



If, for whatever reasons, the API Admin wishes to remove that API from the Sharing Library, they can just click the “Unshare” button on the menu.

This will remove the API from the Sharing Library.

API Shared Library – Adding to your APIs



To start, click on the “Add Dataset” dropdown, then select Shared Library.

Add Dataset From Shared Library

A screenshot of the 'Add Dataset From Shared Library' dialog box. The dialog has a 'Filter' search bar at the top. On the left, there are two sections: 'Address' with a button 'Ethos' and 'Person' with buttons 'Ethos' and 'Banner'. The 'Person' section is highlighted. The main area is divided into 'General Settings' and 'Web Settings'. 'General Settings' has a table with columns 'Name', 'Description', and 'Type', showing a row for 'Person' with 'Web' type. 'Web Settings' has fields for 'Method' (GET), 'URL' (https://integrate.elluciancloud.com/api/persons?criteria=[{"credentials":[{"type":"bannerId","value":"\${Student}"}]}], Shared by: Next Gen), 'Authentication' (API Key), 'Ethos' ([REMOVED]), and 'Headers'. At the bottom right are 'Cancel' and 'Add' buttons.

In the Library, highlight the API you wish to add to your API list and then click the “Add” button.

The API will show up in your list of APIs for the organization that you are in.

API Shared Library – Using the new API

Add Dataset From Shared Library

Filter

Address

Ethos

Shared by: Next Gen

Person

Ethos Banner

Shared by: Next Gen

General Settings

Name	Description	Type
Person		Web

Web Settings

Method

URL

GET

https://integrate.elluciancloud.com/api/persons?criteria=[{"type":"bannerId","value":"\${Student

Authentication

API Key

Ethos

[REMOVED]

Headers

Cancel

Add

At this point, the API Admin is now ready to customize the API for their own purposes.

For example, the API Admin would add their school's authentication source and unique API Keys/passwords to enable the API to work at their school.

API Changes 2

Static Datasets

Static Datasets

What the heck is a Static Dataset and why in the world would I use should a thing?

Our team has continually tried to bring the power of API to all users – first with our core API services, next with the Atlas product that enables clients to use query languages that they are familiar with (SQL and stored procedures) to pull data that is ready to integrate with APIs. Now, with Static Datasets, API Admins may not even need to pull data back from an SIS system, they can store that data in Dynamic Forms

A Dynamic Forms static dataset is a table (group of rows and columns) that can be stored in Dynamic Forms and be referenced on a form.

Static Datasets are useful when you need to do simple lookups on data that will not be changing often. The data is loaded into our system and you can write SQL queries to filter and return the data for your forms. Static Datasets can be used to customize workflows, populate dropdown lists and in many other ways.

We will show how to build a static dataset and hope it might be used in the slides below.

Creating a Static Dataset - Wizard – Step 1

Add Dataset

Save As Draft

1 General Settings 2 Static Data 3 Query 4 Parameters 5 Output

Step 1: Enter basic details about the dataset: name, description (optional), and type.

Name
JimmyG API

Description
Optional

Type
Static Data

CONTINUE CANCEL

When adding the dataset, choose Type = Static Data to start the process.

Using the Wizard – Step 2

Now create the table you would like to reference along with the columns and rows.

The API Admin can either upload a file with the row and columns available in the file, or they can manually add the data as I have done in the image shown to the left.

In this simple example, I am using the table to show the Parking Lot that the user will see in a dropdown. Once that value is chosen, Dynamic Forms can pull one or more pieces of data from the dataset and present it on the form.

Of course, if you have this information available in your SIS, we can pull that data via API also. But if that's too much work or and this information does not change frequently, this is a great option.

Add Dataset Save As Draft x

1 General Settings 2 Static Data 3 Query 4 Parameters 5 Output

Step 2: Add rows and columns to the table, and enter the values for each field.

Table Name
Parking Spot Approvals

Import File

Data

column1	column2
Science Building	frank@myschool.edu
Business School	julie@myschool.edu
Administrative Building	sally@myschool.edu
Parking Lot K	jimmy@myschool.edu

CONTINUE BACK CANCEL

Import Data File x

Upload Excel Spreadsheet or file with columns delimited by comma (,), pipe (|), or spaced with single tab.

Select a file to import
Choose File No file chosen

Upload File

Using the Wizard – Step 3

Step 3 is telling Dynamic Forms what data to pull when your key value is selected.

So in our example, if someone choose “Science Building” in a dropdown , the value in column 2 could be placed in a field on the form.

Then, if desired that value frank@myschool.edu could be chosen as the next participant in the workflow.

column1	column2
Science Building	frank@myschool.edu
Business School	julie@myschool.edu
Administrative Building	sally@myschool.edu
Parking Lot K	jimmy@myschool.edu

Add Dataset

Save As Draft

1 General Settings

2 Static Data

3 Query

4 Parameters

5 Output

Step 3: Query static data.

- Query:** Provide a query as a parameterized SQL statement. Parameters are defined by prefixing them with the '@' character, such as the following example:

`SELECT column1, column2 FROM Parking Spot Approvals WHERE column1 = @Id`

Query

`SELECT column1, column2 FROM Parking Spot Approvals WHERE column1 = @ParkLocation`

CONTINUE

BACK

CANCEL

Using the Wizard – Step 4

Add Dataset Save As Draft x

1 General Settings 2 Static Data 3 Query 4 Parameters 5 Output

Input Values

Input values are automatically determined using the other settings on the dataset. To add input values for static data queries, add them as parameters in the Query field. Parameters are defined by prefixing them with the '@' character in the query.

ParkLocation ☒ (required)

CONTINUE BACK CANCEL

Here Dynamic Forms is ensuring we have the right key value(s) an API Admin would want as the input value to search the dataset.

In other words, in this example, we want the Parking Location value to drive the look-up.

Using the Wizard – Step 5

Add Dataset Save Draft ×

1 General Settings 2 Static Data 3 Query 4 Parameters 5 Output

Output

Enter values for the input parameters, then click the button to load test data.

Id

Send Test Request

CREATE DATASET BACK CANCEL

Next, verify your work by entering a test value to ensure you have everything correct.

Integrating your Static Data Set into a Form

The first step in using it in a form, is to create a form! In this simple example, I have two text boxes on the form (you may want to use a drop down box instead).

I am expecting that if user enters a value in the Parking Area, the form will then query the Static Dataset and produce the Email address that I can now use in a workflow.



Parking Area

Email Address

Integrating your Static Data Set into a Form


Form: Static API


Org: |

Name / Type
Admin Notification
Payments
Custom Text
SSO
Events
Advanced

Pages

Page 1

 Preview in Browser

 Preview as PDF

Last updated:
Jim Grace Aug 10, 2022, 9:18:29 AM

The second step is using the Events area in the designer to build out the API process.

First we are choosing to do a look-up real-time “when the user is filling out the form”, then the API Admin or the Form Designer can choose the API and the value where the key value is – in this case Text Box1. Then I will map the other data in the Static Dataset to other fields in the form – in this case – column 2 data will go into Textbox 2.

Name

Parking Lots

Triggers

- ☐ After the form is created
- ☐ Before starting the form
- ☒ When the user is filling out the form
- ☐ When the e-sign page loads
- ☐ After submitting the form
- ☐ After the form is pending
- ☐ After the form is returned for revision
- ☐ After the form is processed
- ☐ After opting out of e-signature
- ☐ When the user saves a draft of the form

Details

School	Data Set	Action
Demo School	Jimmy GAPis	Pull form values real-time by API calls while filling c

Terms of Use

In order to use a real-time API, you must understand the risks associated with allowing a form user to access your institution data real-time. Please read the attached disclaimer [[here](#)] and accept the terms of use below.

Yes, I agree

Criteria

Id
Get the value when the user fills out the form

TextBox1

Field Mappings

☐ Multiple Records

API Field

Email

Form Field

TextBox2

Integrating your Static Data Set into a Form

Now, the end user will complete the form.
In this case I have entered “Business School” which is a valid entry and....

Dynamic Forms kicked off the event to do a lookup on the value provided in Text Box 1 and return a value for Text Box 2.

In this case, Business School will return the email address of [Julie@myschool.edu](mailto:julie@myschool.edu) and Julie can now be included in the workflow.

Parking Area	<input type="text" value="Business School"/>
Email Address	<input type="text" value="julie@myschool.edu"/>
<div><input type="button" value="Save Progress"/> <input type="button" value="Next"/></div>	

Texting – Returned

New Enhancements

Texting

No tricks here. When we first implemented texting, we overlooked the Returned action when sending texts. This change remedies that missed status.

Therefore, now when an Administrator returns a form to a user, a text message can also be sent to that user.

- Given that the Admin's org is allowed to send texts and
- Given that the User has signed up to receive texts.

New Payment Integration

Nelnet Campus Commerce

Nelnet Campus Commerce

With this release we are welcoming Nelnet Campus Commerce to our growing stable of integrated payment vendors.



Welcome



Nelnet Campus Commerce

To use Nelnet Campus Commerce within your form, firstly your organization must have payments turned on.

Next, of course, you must be a Nelnet Campus Commerce customer with valid credentials.

The rest is easy, maneuver to the Payments tab in Dynamic Forms, and choose Nelnet Campus Commerce in the drop-down.

Enter your Tenant ID and Order Definition ID for the integration to work. Choose if you want to test or use in production and that's it!

Form: A&E - Sammy Tickets
Org: Graceland

Name / Type
Admin Notification
Payments
Reservation Events
Custom Text
SSO
Events
Advanced

Pages +

Page 1

[Preview in Browser](#)

[Preview as PDF](#)

Is this a payment form? Yes

Payment System
Nelnet Campus Commerce

Configuration

Tenant Id

Order Definition Id

Use Testing Environment? No

Send payment confirmation email? No

Nelnet Campus Commerce

In this example, I have ordered two Sammy Hagar concert tickets and have been routed over the Nelnet Campus Commerce site (this would be your school's site) to make the payment. Like all payment forms, after the transaction has been completed, the user is routed back to the Dynamic Forms confirmation page to see their Order ID and payment results.

Next Gen

Make A Payment

Payment Information

* Indicates required field

Your Information

First Name *

Last Name *

Email Address *

Phone Number *

Payment Method

Payment Method Disclosure:

Card transactions for Next Gen are processed by Nelnet Campus Commerce, USA

Add Payment Method

☐

Credit/Debit Card

☐

Bank Account

Questions about your payment? [Contact Us](#)

121 S. 13th St, Suite 201, Lincoln, NE 68508-1911

Payment Details

Today's Amount Due: \$200.00

Event registration

\$200.00

Total

\$200.00

Authorization

Submit Payment for \$200.00

Cancel

© 2022 Nelnet

Get your seats for Sammy visiting the college now!!!!

Sammy Hagar Concert

Theatre | Floor F on 7/27/2022 at 8:00 PM (2)

Order: 87

SAMMY HAGAR AND THE CIRCLE

CRAZY TIMES AVAILABLE SEPTEMBER 30 • PRE-ORDER NOW

Payment Results

Transaction Total

Confirmation Number

Paid on 8/9/2022 2:20:35 PM

\$206.00

62f2ca5724648d7756a999dc8c

End Release 10.1
