Dynamic Forms

Release 10.2

Release 10.2 Summary

- CC or Carbon Copying individuals on form submissions.
- The ability to use ANDs + ORs in Rules and Workflow Conditions
- Reporting – New standard reports, will continue to add new reports as needed
- Designer code base updated – faster performance
- File Upload – Users can now add multiple files in one upload, plus they are able to view the files prior to submission
- New option for Payment Vendor Integration - Nelnet’s “Checkout” Service

Release 10.2

May Release Date

CC or Carbon Copying

New Enhancements

CC or Carbon Copying Forms

There is a great history of carbon copying on wiki - https://en.wikipedia.org/wiki/Carbon_copy

Before the development of photographic copiers, a **carbon copy** was the under-copy of a typed or written document placed over carbon paper and the under-copy sheet itself (not to be confused with the carbon print family of photographic reproduction processes).[1] When copies of business letters were so produced, it was customary to use the acronym "CC" or "cc" before a colon and below the writer's signature to inform the principal recipient that carbon copies had been made and distributed to the parties listed after the colon.[2] With the advent of word processors and e-mail, "cc" is used as a merely formal indication of the distribution of letters to secondary recipients.

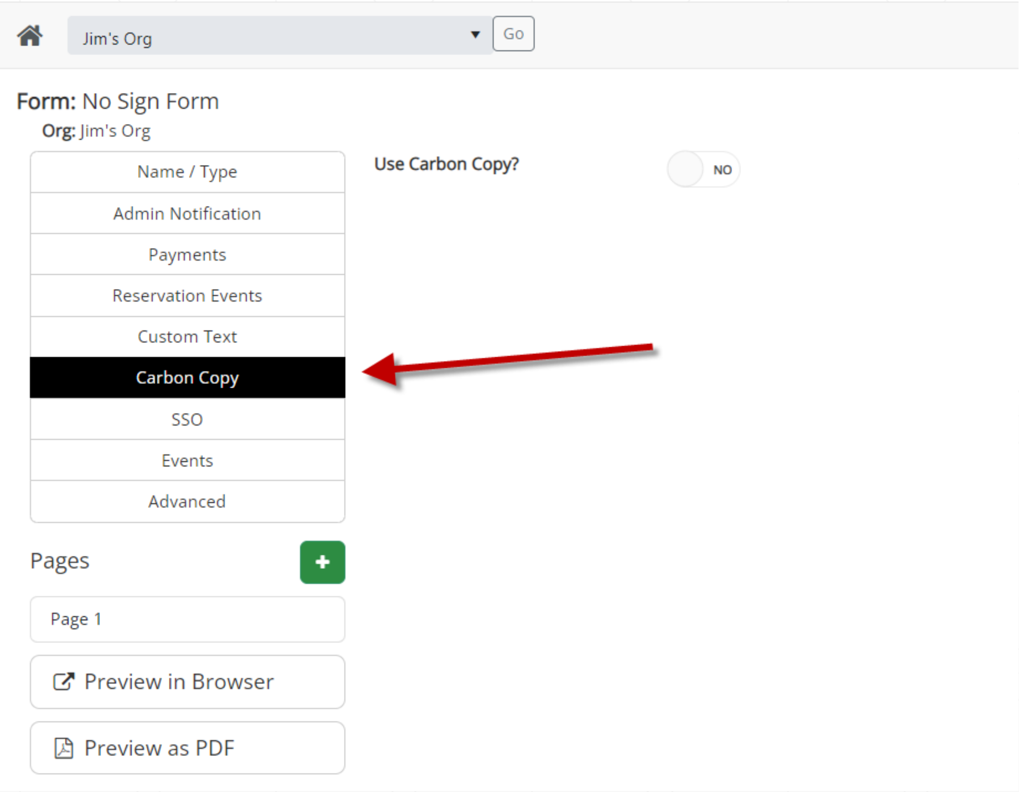
A copy made with carbon paper

That's what Dynamic Form is bringing in Release 10.2 –

A way for users (not included in the workflow of a form) to see the results of a completed form.

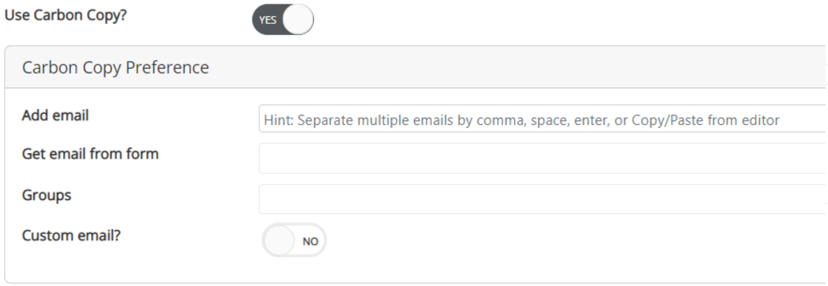
CC for No Sign and Single Sign Forms

To use CC on No Sign or Single Sign Forms, there is a new button on the left navigation for you to indicate this form should use CC.   You will configure the CC on this page also.



CC Options Explained – No Sign / Single Sign

More details related to the No Sign or Single Sign forms….



Add E-mail: Here Admin Users are manually keying in the email addresses of the users that should be CCed on this form submission.

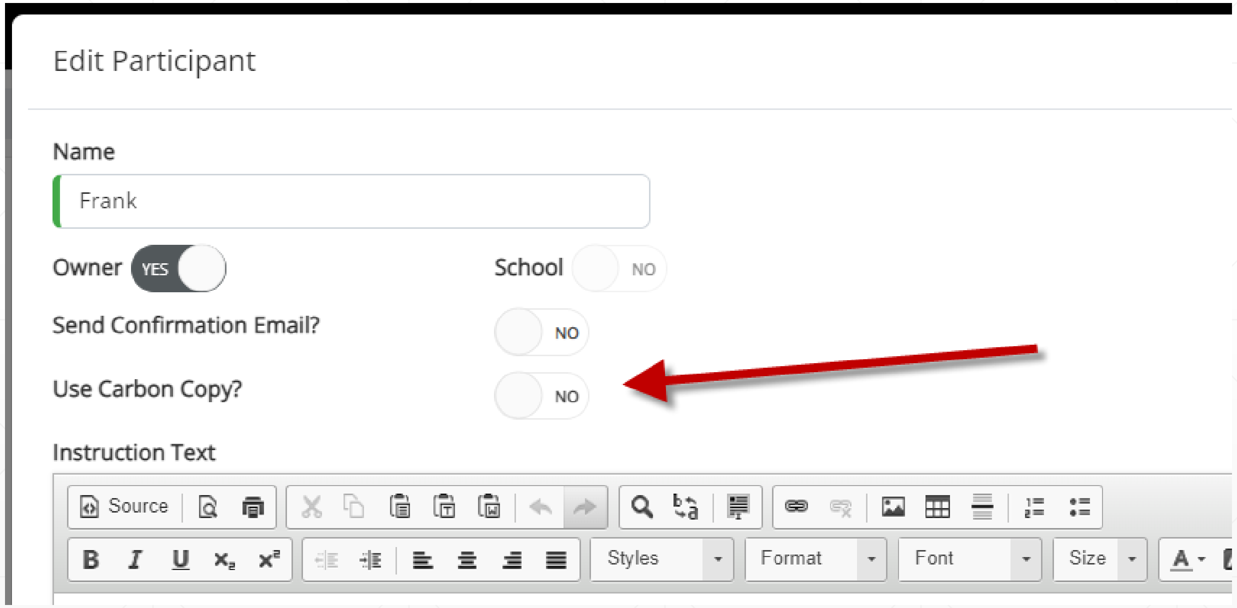
Get E-mail From Form: Here Admin Users can define fields on the form (that are e-mail addresses) that should be CCed on this form submission.

Groups: Here Admin Users are selecting User Groups that should be CCed on this form submission.

Custom E-mail: Like most all emails in Dynamic Forms, here Admins are allowed to customize the CC e-mail the CC user will receive.

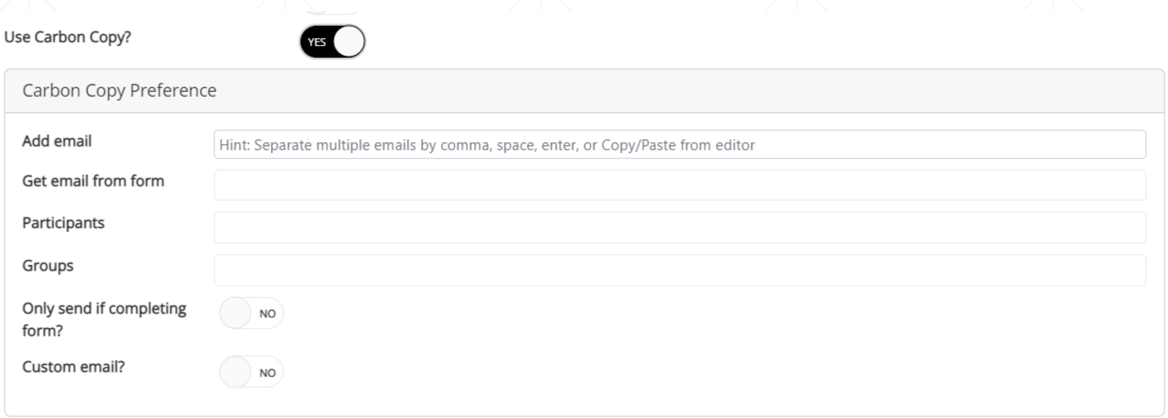
CC for Multiple Signature Forms

To use CC on Multiple Signature Forms, there is a new “Use Carbon Copy” on each participant’s profile (as shown below). Therefore, along each step of the workflow, you can define different (or the same) individuals getting CCs on the progress. You will configure the CC on this page also.



CC Options Explained – Multiple Sign

More details related to the Multiple Sign forms….



Add E-mail: Here Admin Users are manually keying in the email addresses of the users that should be CCed on this form submission.

Get E-mail From Form: Here Admin Users can define fields on the form (that are e-mail addresses) that should be CCed on this form submission.

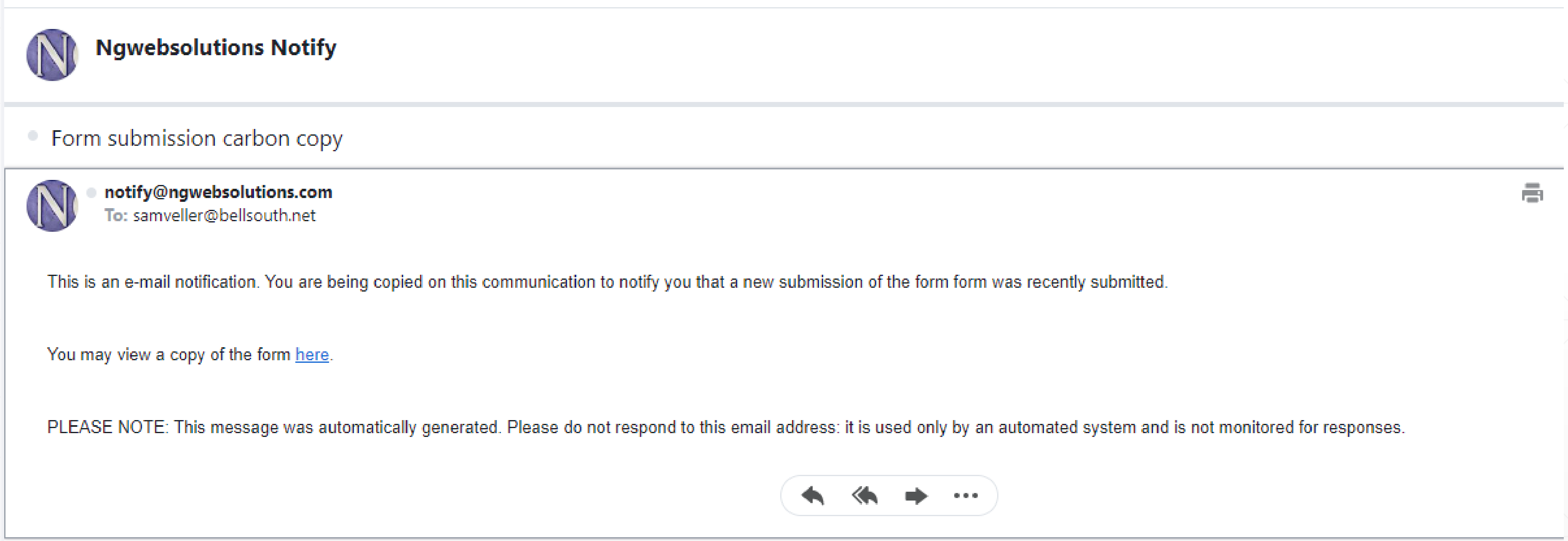
Groups: Here Admin Users are selecting User Groups that should be CCed on this form submission.

Only send if completing form: This option can be used if you are needing CC to happen when the last person has signed the form. This only applies to forms with a conditional workflow.

Custom E-mail: Like most all emails in Dynamic Forms, here Admins are allowed to customize the CC e-mail the CC user will receive.

CC E-mail Example

When a User has forms that they have been copied on, they will be able to see them over time in the NEW “Forms I’m Copied” section.



Ngwebsolutions Notify

Form submission carbon copy

notify@ngwebsolutions.com
To: samveller@bellsouth.net

This is an e-mail notification. You are being copied on this communication to notify you that a new submission of the form form was recently submitted.

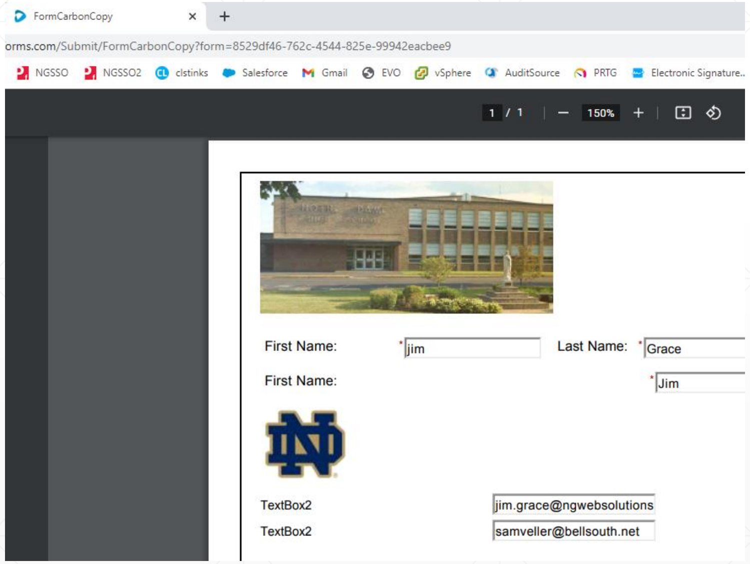
You may view a copy of the form here.

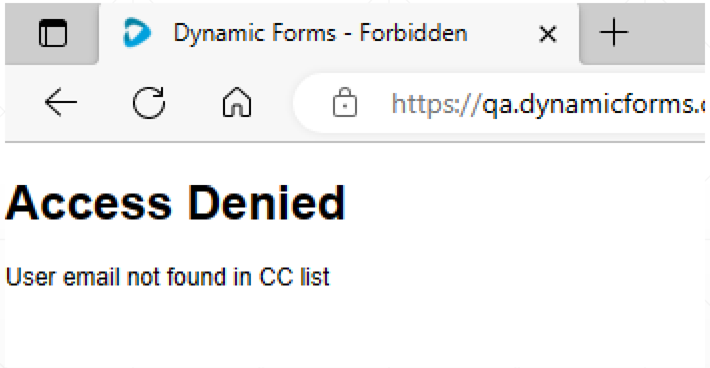
PLEASE NOTE: This message was automatically generated. Please do not respond to this email address: it is used only by an automated system and is not monitored for responses.

CC E-mail Access

Here are the outcomes of the attempted to access CC E-mails.

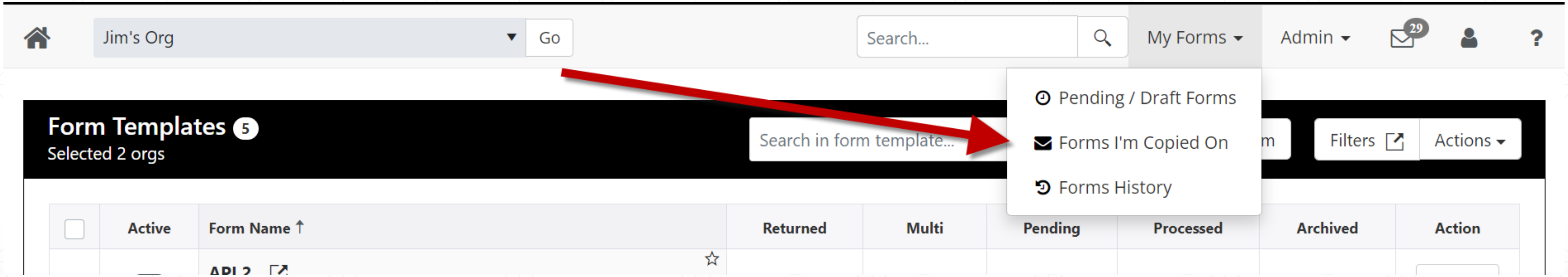
Successful Outcome – User sees the Form	Unsuccessful Outcome – Access Denied Screen





New Form Status Area

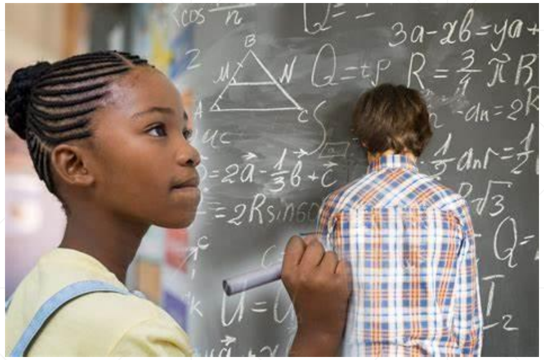
When a User has forms that they have been copied on, they will be able to see them over time in the NEW "Forms I'm Copied" section.



ANDs + ORs

New Enhancements

ANDs + ORs in Rules



Some people are good at logic and math – so my silly examples below will not be tremendously helpful. However, since I hit my head against the blackboard during math class, I am hoping to make this section as easy as possible to understand!

Example 1:

You have 3 rolls of coins with 10 coins in them and 4 rolls of coins with 25 coins in each, how many coins do you have?

(3 * 10) + (4 * 25)

Here it is best to put things in groups and the groups are worked first, so I need to multiple 3x10=30 and 4x25=100 then add the numbers together 30+100=130 to get the answer.

ANDs + ORs in Rules

In this new Dynamic Forms example, I want to show some people a funny picture of my dog.

However, I only want to show people if they like dogs AND they need to answer what their Favorite Dog Breed OR they just don't like cats.

I can break this down into a group statement again.

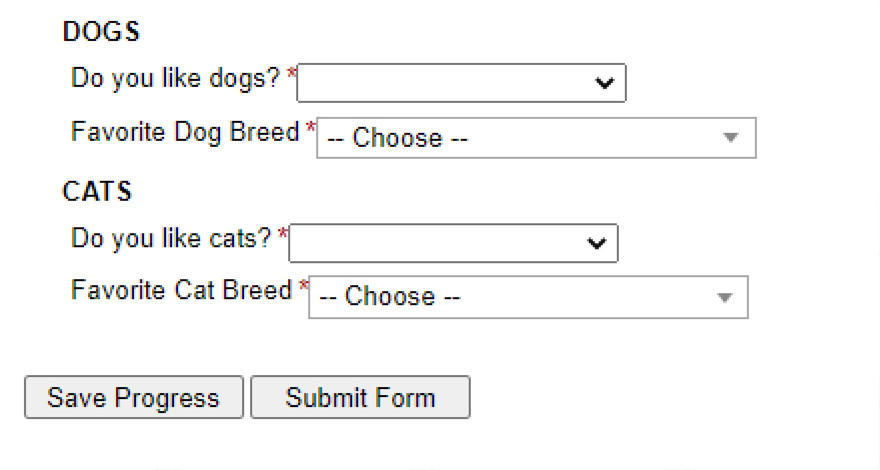
Group 1:

Must like Dogs **AND**
Must pick Breed

OR

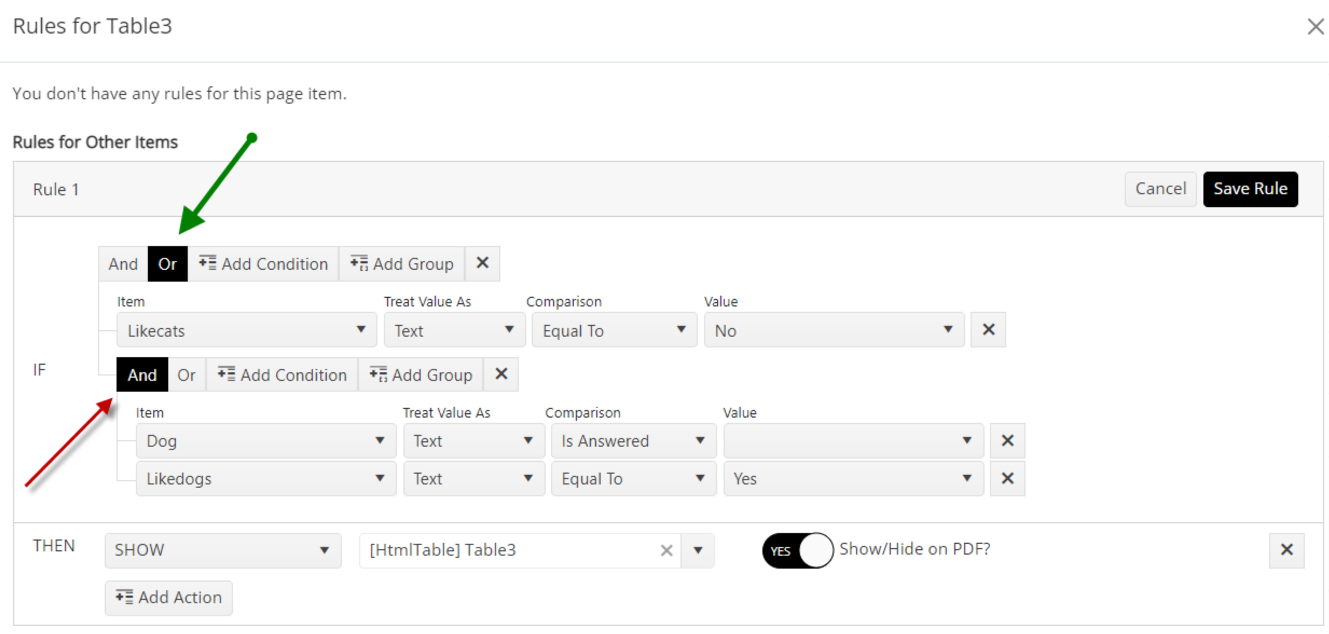
Group 2:

Must not like cats



ANDs + ORs in Rules

With the new Dynamic Forms
ANDs + ORs functionality this is easy!!



First, since it is an OR statement - I will choose my **OR** at the top (green arrow) – then I can add my groups.

Click “Add Group” to add my first group: User does not like cats.

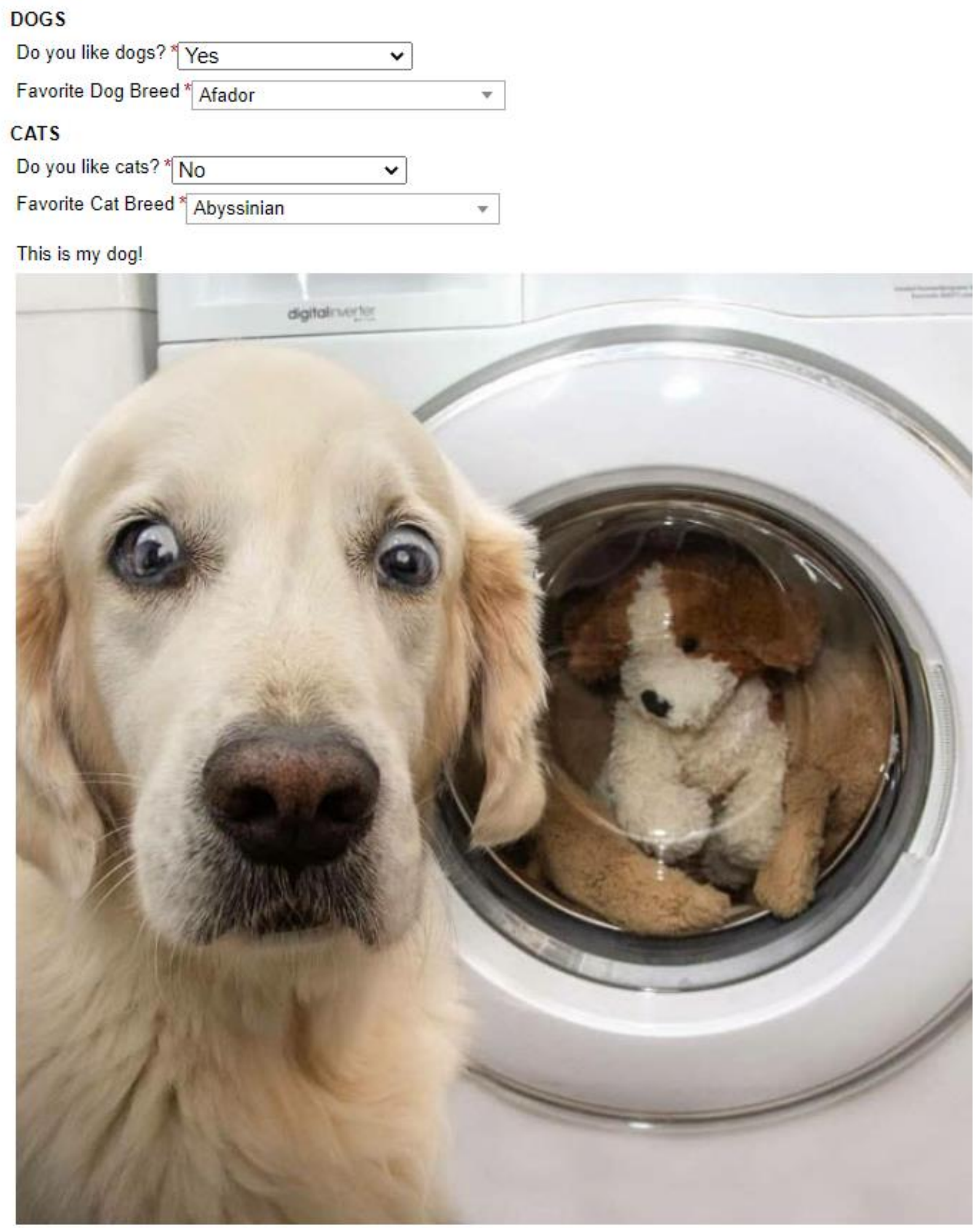
Then I would click “Add Group” again to finish. After adding the Dog is answered question, I would add another condition with the AND statement (red arrow). Then add the “Like Dogs” question.

ANDs + ORs in Rules

First Form Submission!

In this case, the user gets to see my dog, because all conditions are met –

1. They like dogs
2. They selected a breed
3. They did not like cats



ANDs + ORs in Rules

Second Form Submission!

In this case, the user gets to see my dog, because:

1. They like dogs
2. They selected a breed
3. They like cats

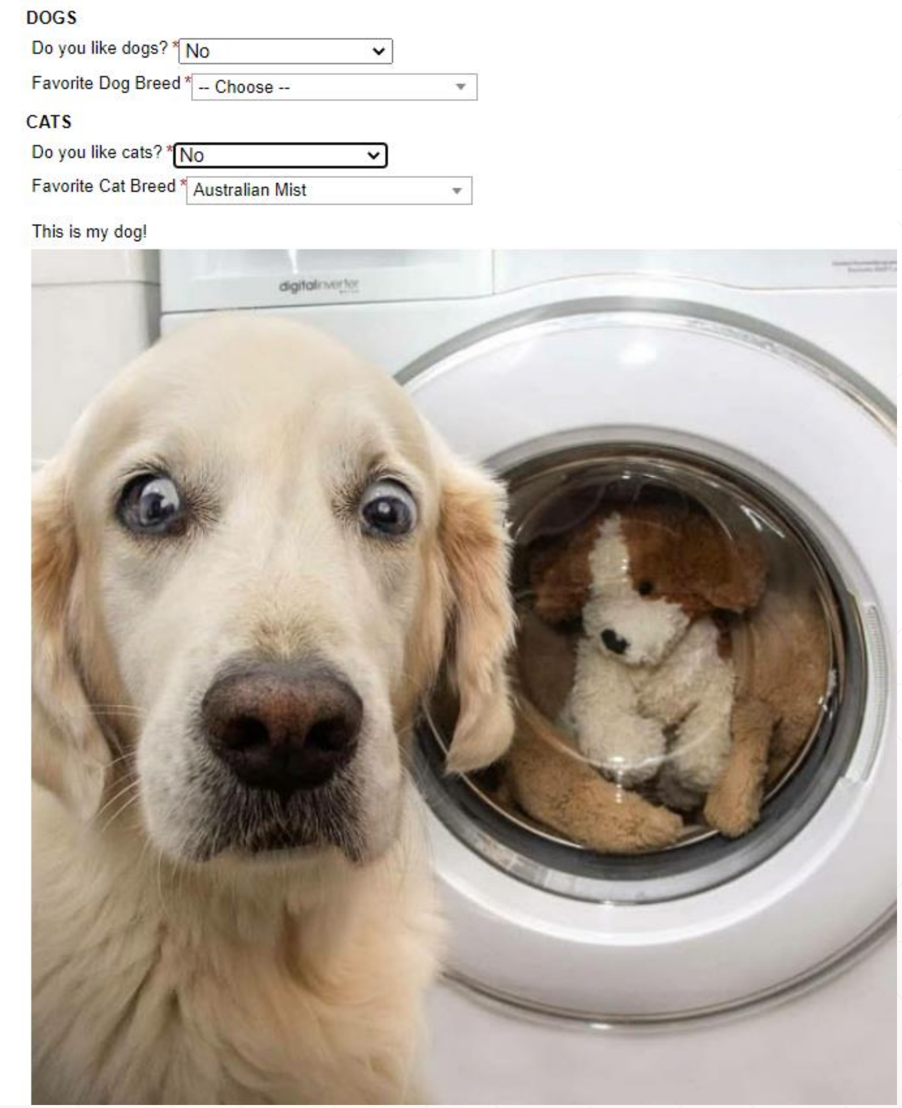
They like cats, but that’s OK, they meet the first two conditions.

ANDs + ORs in Rules

Third Form Submission!

In this case, the user gets to see my dog, because this condition is met –

1. They like dogs
2. They selected a breed
3. They did not like cats



ANDs + ORs in Rules

Finally the fourth Form Submission!

In this case, the user does not get to see my dog, because none of the conditions are met –

1. They like dogs
2. They selected a breed
3. They did not like cats

Reporting

Enhancements/Changes

Reporting

Dynamic Forms has implemented a new Reporting interface which will come with 20+ canned reports.

Reports are available to users who have reporting permissions plus have access to see the reports.

For example if you are a Registrar, you might have access to see the Reporting scene and see Registrar related information, but you may not have access to see information on Financial Aid forms (if you do not have access to the Financial Aid org).

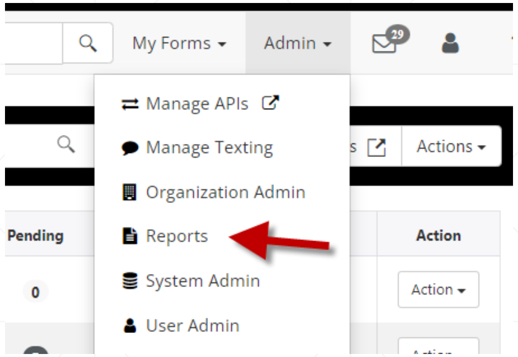
We will continuously review the reports available and take requests for missing reports three months after the release, but custom reports after that time period may be an upcharge.

Admin Reports

Reports List

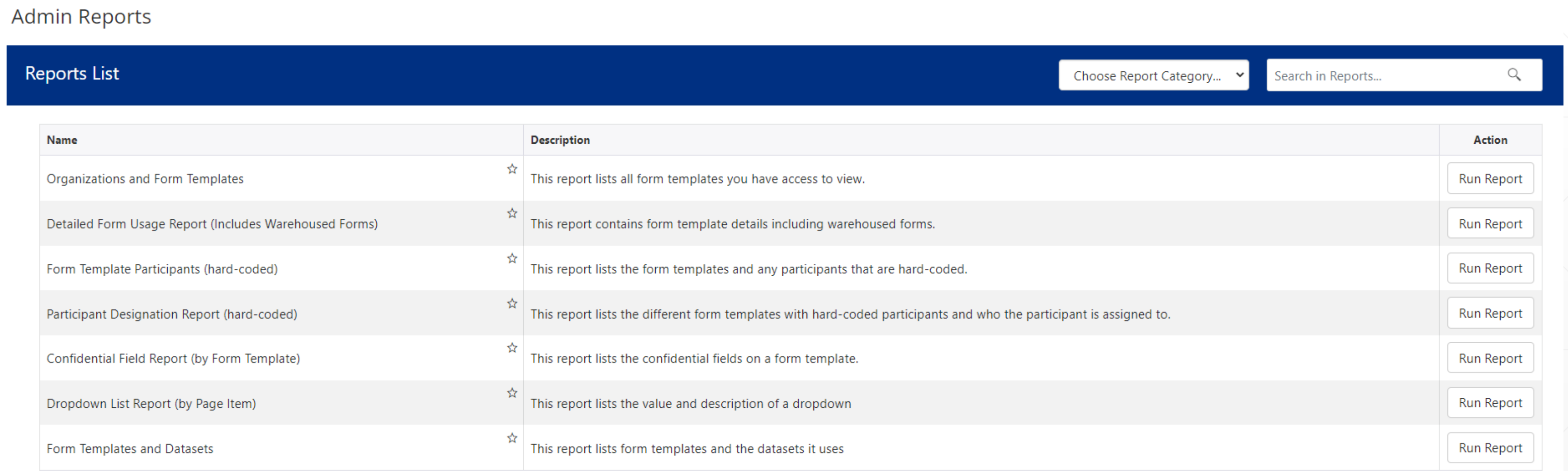
Active	Name
Yes	All admins
Yes	Admin Report - Permissions and Orgs
Yes	Organizations and Form Templates
Yes	Detailed Form Usage Report (Includes Warehoused Forms)
No	Form Template Participants (hard-coded)
No	Participant Designation Report
Yes	User Group Report
No	Form Templates using User Groups
No	Form Templates using Appointment/Event Report
No	Appointments/Events Report
No	Venue Report
No	Payment Form Report
No	Invitations Report
No	All Users (SSO clients)
Yes	Submitted Forms (by date range)
Yes	Confidential Field Report (by Form Template)
Yes	Dropdown List Report (by Page Item)
Yes	Page Item Report
Yes	Mako Test
No	Form Status Report (by Form Template)
Yes	Form Templates and Datasets

Reporting



As mentioned, to access the Reporting feature, you must have Reporting permissions. If you do, click the Admin menu item, then the Reports menu selection.

This will open the reporting interface.


Admin Reports

Reports List

Choose Report Category...

Search in Reports...

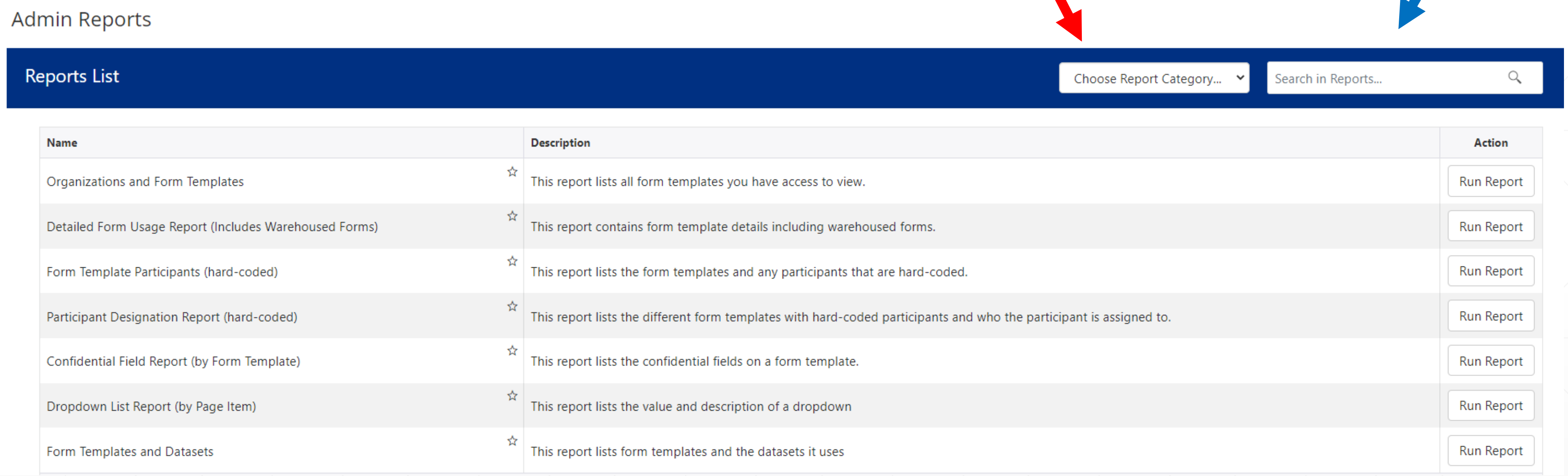
Name	Description	Action
Organizations and Form Templates	This report lists all form templates you have access to view.	Run Report
Detailed Form Usage Report (Includes Warehoused Forms)	This report contains form template details including warehoused forms.	Run Report
Form Template Participants (hard-coded)	This report lists the form templates and any participants that are hard-coded.	Run Report
Participant Designation Report (hard-coded)	This report lists the different form templates with hard-coded participants and who the participant is assigned to.	Run Report
Confidential Field Report (by Form Template)	This report lists the confidential fields on a form template.	Run Report
Dropdown List Report (by Page Item)	This report lists the value and description of a dropdown	Run Report
Form Templates and Datasets	This report lists form templates and the datasets it uses	Run Report

Reporting

Features:

Or by searching for a specific report.

Reports can be found by looking at specific categories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Dropdown List Report (by Page Item)	This report lists the value and description of a dropdown	Run Report
Form Templates and Datasets	This report lists form templates and the datasets it uses	Run Report

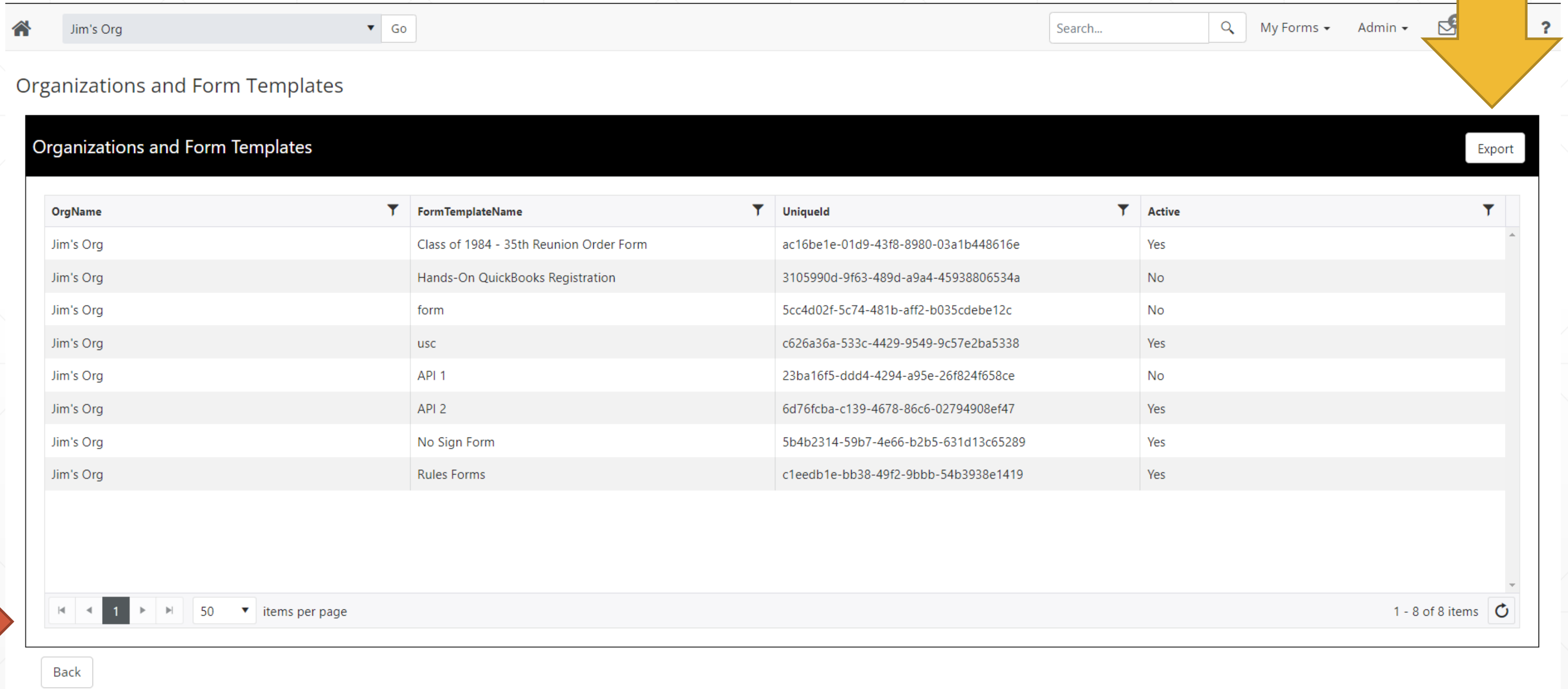
Reports are run, by clicking Run Report button to the right of the report name.

Reporting

Report Features:

Data from the report can be downloaded to Excel via the Export button.

Users can control the number of items seen on the page by adjusting the “items per page” number here

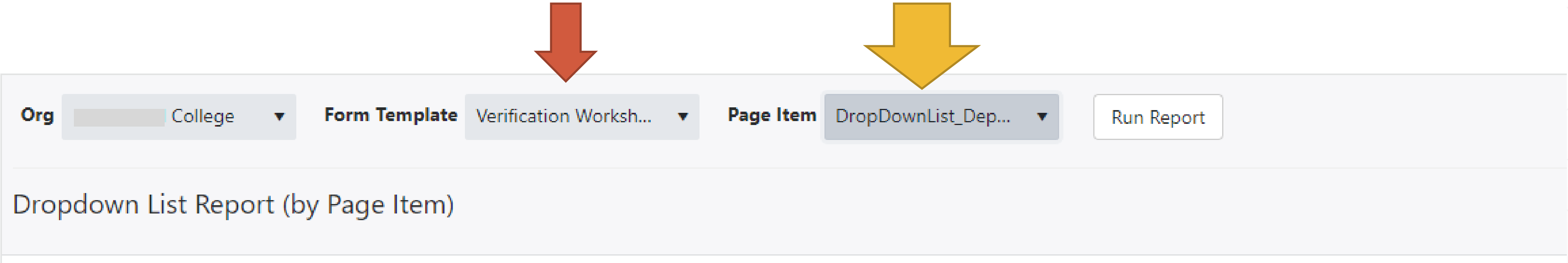


OrgName	FormTemplateName	UniqueId	Active
Jim's Org	Class of 1984 - 35th Reunion Order Form	ac16be1e-01d9-43f8-8980-03a1b448616e	Yes
Jim's Org	Hands-On QuickBooks Registration	3105990d-9f63-489d-a9a4-45938806534a	No
Jim's Org	form	5cc4d02f-5c74-481b-aff2-b035cdebe12c	No
Jim's Org	usc	c626a36a-533c-4429-9549-9c57e2ba5338	Yes
Jim's Org	API 1	23ba16f5-ddd4-4294-a95e-26f824f658ce	No
Jim's Org	API 2	6d76fcba-c139-4678-86c6-02794908ef47	Yes
Jim's Org	No Sign Form	5b4b2314-59b7-4e66-b2b5-631d13c65289	Yes
Jim's Org	Rules Forms	c1eedb1e-bb38-49f2-9bbb-54b3938e1419	Yes

Reporting

Some reports will need additional detail to get you the right results.
In the example below, the report is supposed to show all possible answers on a selected dropdown list.

However this school has 100s of form templates and likely most of those form templates have multiple dropdown lists.   So this slide is asking for more detail (Form Template and Page Item Name) to get the expected results.



Value	Description	Order
Dependent Student	Dependent Student (you were required to report parental information on the FAFSA)	2
Independent Student	Independent Student (you were not required to report parental information on the FAFSA)	1

Designer Update

Enhancements/Changes

Designer Update

Form Designers may notice a few things different about the designer. These things should be:

- Its faster!
- Some colors may have changed – like the pink save has turned golden
- Some toggle (Yes/No, On/Off) buttons look a little different

File Upload

Enhancements/Changes

File Upload

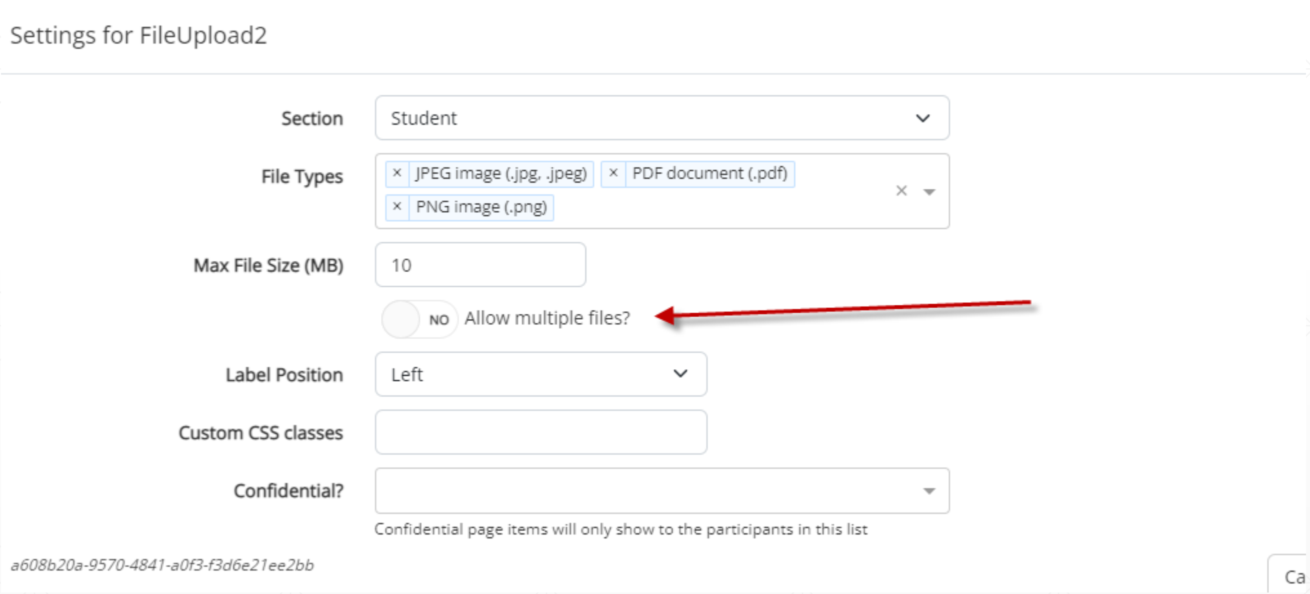
Many users have asked us to have the file upload be able to upload multiple files in the same transaction.

For example, if a student is uploading a three page 1040 tax form, and they have taken three pictures from their camera phone showing each page.   Now users are able to:

1. Optionally, select multiple files to upload
2. Review the upload prior to submitting it.

Turning on Multiple File Uploads

To allow users to upload multiple files, there is a new setting in the Advanced area of the Upload page item (see below). Just click the "Allow multiple files?" toggle switch to "Yes" to allow this users to upload multiple files.

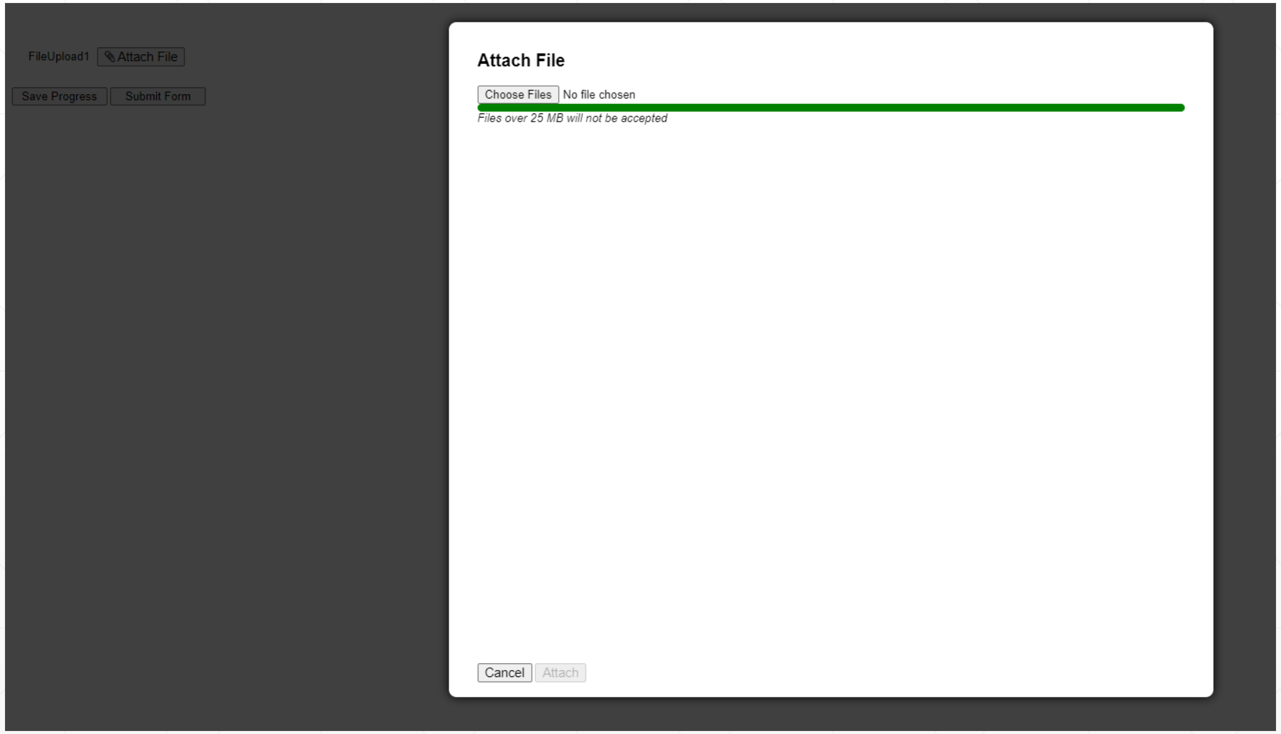


Note: This functionality is not automatically turned on as several clients have a one-to-one relationship with uploaded documents to required documents. Enabling this functionality by default would potentially break that relationship.

File Upload

For example:

In this transaction, I am uploading two Next Gen product logos and other dog picture to be submitted.
Notice the new upload modal appears.

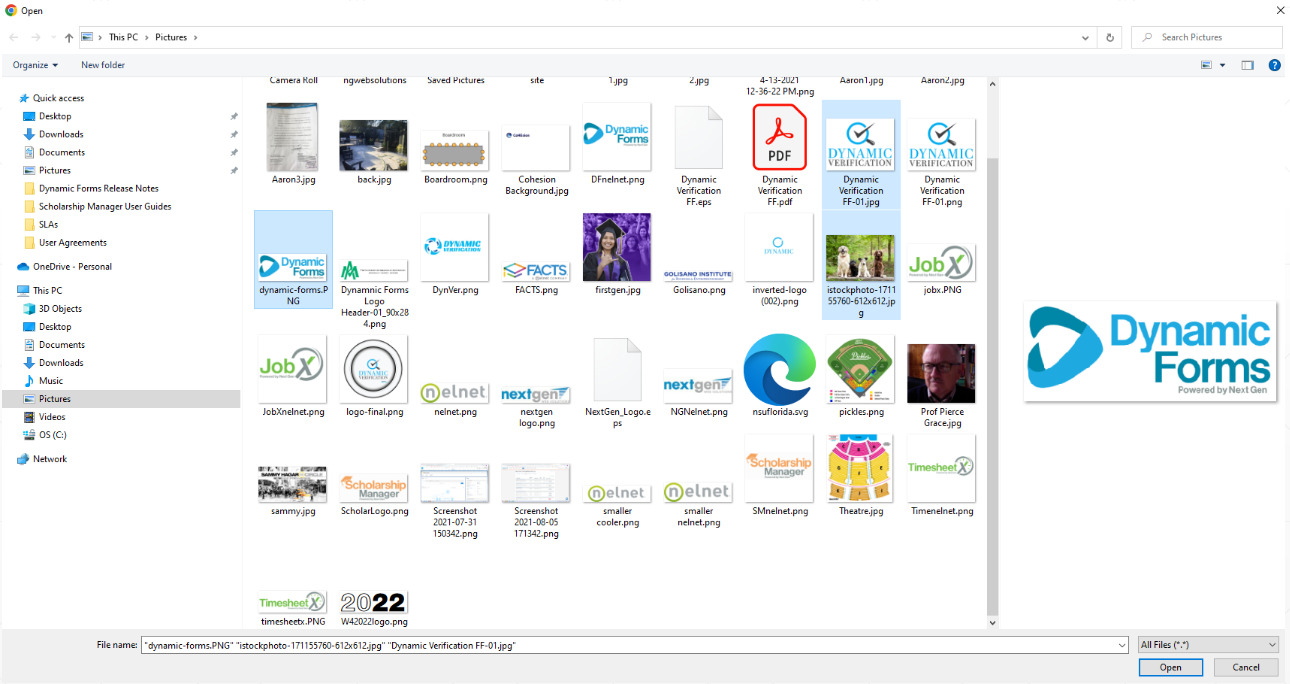


File Upload

For example:

Now when I am choosing files, I have the ability to select multiple files – this might be done by holding the “CTRL” key on a laptop or selecting the items on a phone (there may be other solutions based on device also.

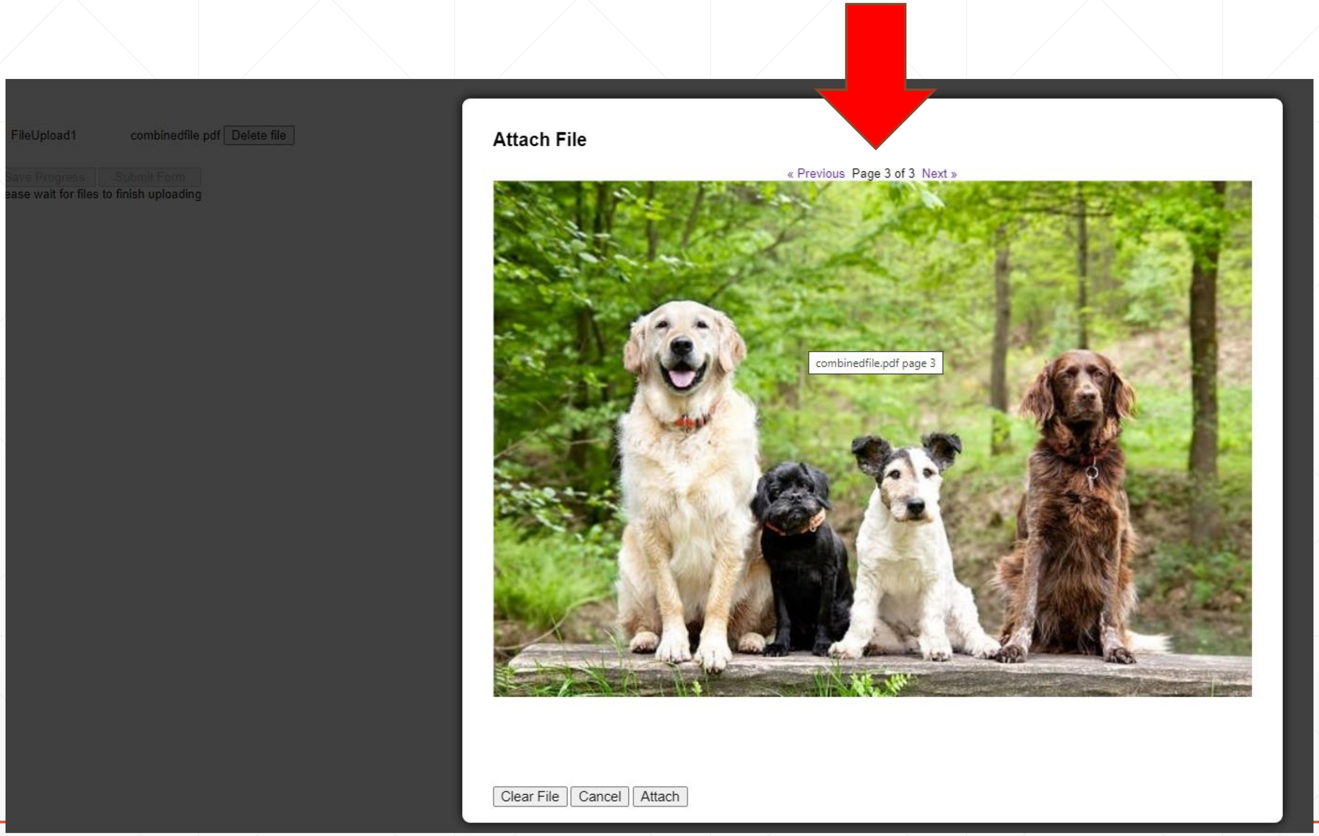
So, I have selected a copy of our Dynamic Verification logo *(new product coming later in 2023)*, a Dynamic Forms logo and finally a dog picture.



File Upload

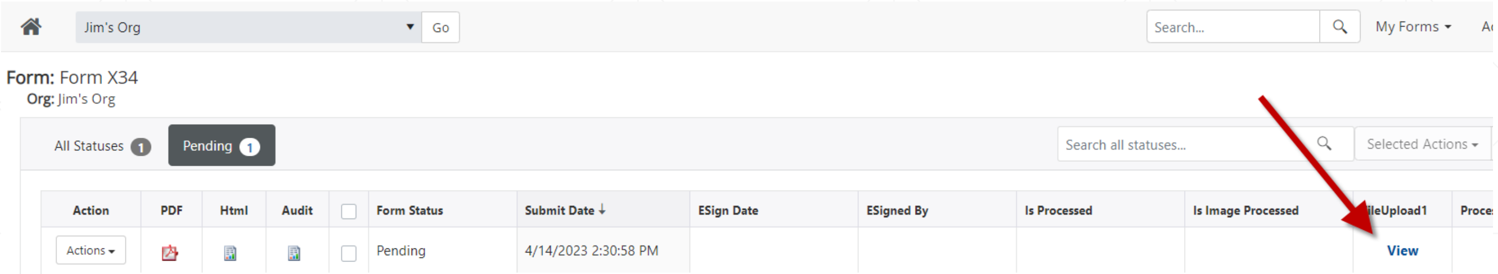
When the user is done selecting files, the modal changes to show my uploaded selections.   Notice the feature on top that allows the user to move from the first image to the third image to verify the selections.

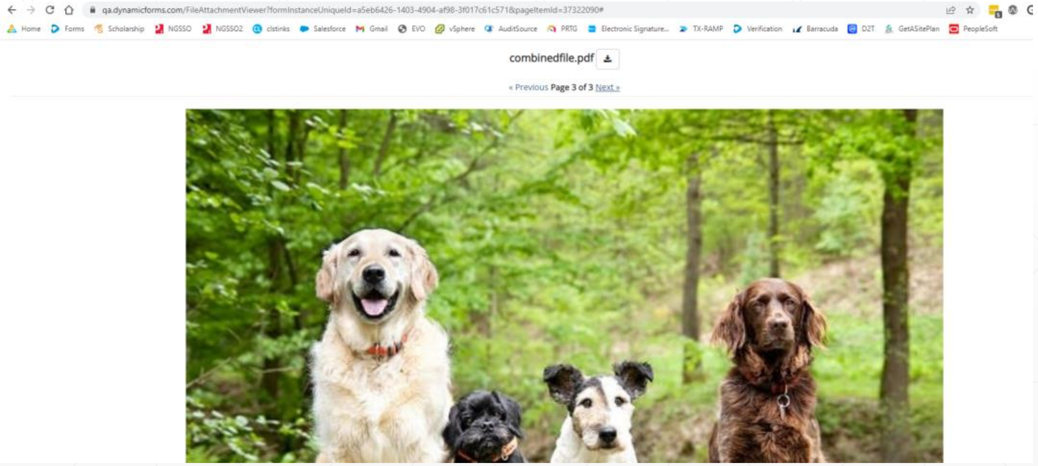
When the user satisfied with their selections, they can hit the Attach button to submit them to the form.   Otherwise the use can cancel or clear the file and start again.



File Upload

The Admin will see the form upload in the form queue as they do today.





Likewise, as today the admin will see the upload in the viewer and have the ability to download the attachment if needed.

Nelnet's Checkout Service

Enhancements/Changes

Add new Payment Option – Nelnet Checkout

Today, Dynamic Forms offers several payment options within the product, including:

- Paypal
- Touchnet
- Official Payments
- Cashnet
- Authorize.net
- Financial Payments
- Tuition Management Systems

We also have several versions of Nelnet products, including:

- Commerce Manager
- QuikPay

And now we are adding Checkout.

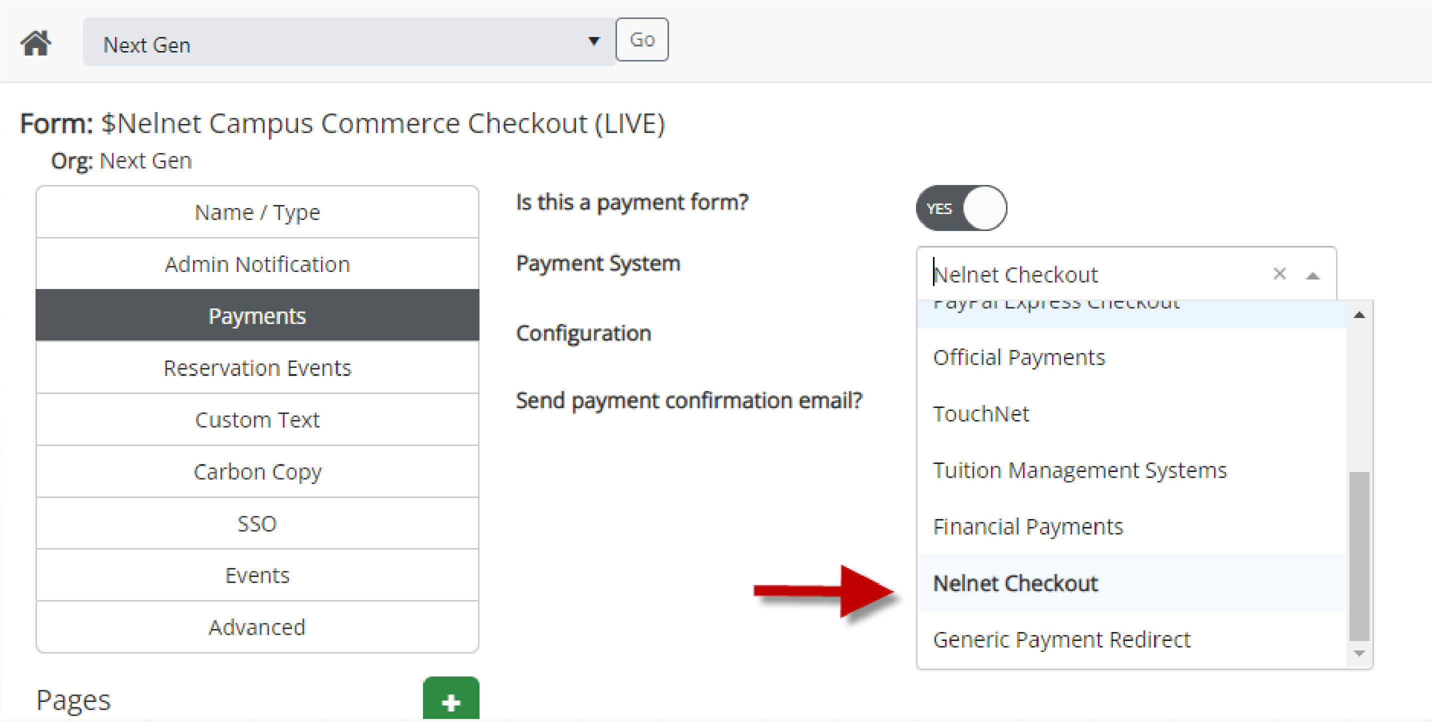
Nelnet Checkout

Streamline all payments, third parties or internal, through one system. Nelnet Checkout provides one common “make-a-payment” experience for any digital payment your students, supporters or staff may need to make. Since all payments go through one platform, reporting and order management capabilities flow nicely to your business office for end-of-day reporting and auditing. Your institution, and certified third-party partners, can integrate Checkout into your suite of products to send payers into an online checkout experience for the submission of single, real-time payments.

For more information: https://campuscommerce.com/payment-solutions/checkout/

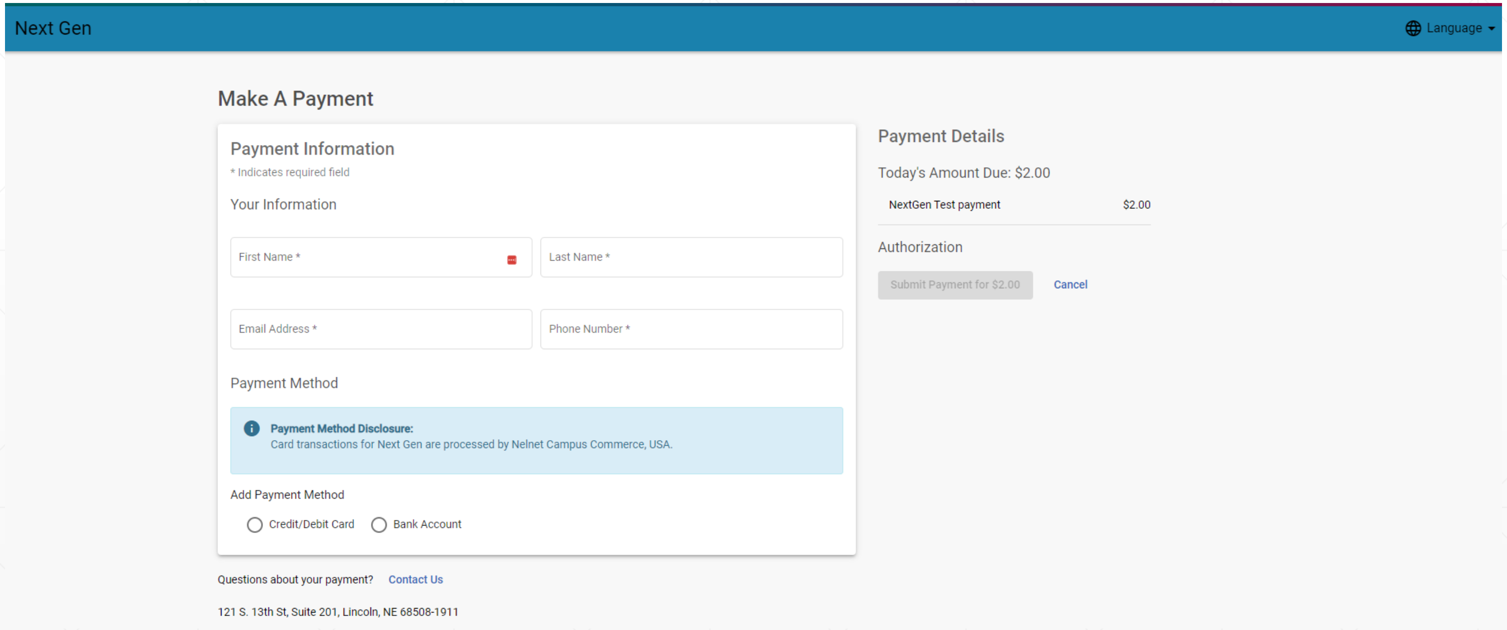
Nelnet Checkout

This would work as any payment vendor process works today – on the Payments button, select then configure your Nelnet Checkout options.



Nelnet Checkout

Again like all other payment vendors, the user will be redirected to a branded school page to make the payment. A huge enhancement for Checkout versus CommerceManager or other Nelnet product is an improved communication process after payment that assures Dynamic Forms receives a correct status of payment / confirmation of payment and details every time.



On-going and Future Work

Product Roadmap - 2023 Work

- Dynamic Forms Exchange 2 (DFE2) - May
- Dynamic Forms – Azure Platform – QA site Expected in June
- Dynamic Forms – Azure Platform – Production site – expected after successful QA site testing.
- Dynamic Verification – soon after successful Dynamic Forms Azure Production release.