

# ACADEMIC TECHNOLOGY SUPPORT



## **Dynamic Forms: Advanced Form Building**

*Adding Signatures, Rules and Conditions.*

[ats@etsu.edu](mailto:ats@etsu.edu) | 439-8611

[www.etsu.edu/ats](http://www.etsu.edu/ats)

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## Rules and Conditions

Once you have added fields to a form or created at least one field and multiple pages you can begin to add Rules and Conditions to your form via the Rules/Conditions tab in the form basics interface.

Rules and Conditions are set up as IF/THEN statements and can be based on any fillable field you have included on your form. These statements allow you to hide or show elements in real time as a form is filled out.

The screenshot displays the 'Form Rules / Conditions' configuration page. At the top, there are navigation tabs: 'Form Name / Type', 'Admin Notification', 'Payments', 'Single Sign On', 'Inactive Text', 'Cosigners', and 'Rules/Conditions'. The main heading is 'Form Rules / Conditions' with a red error icon. Below the heading are two buttons: '+Add a New Rule' and 'Save Rules'.

There are three rules defined:

- Rule 1 (Yellow background):** Labeled 'Rule 1' with a 'Delete Rule' link. The 'IF' condition consists of two items: 'choice\_highschool' and 'choice\_program', both set to 'Text' and 'Is Not Answered'. The logical connector is 'AND'. The 'THEN' action is '(none)'. There is a 'Save Rules' button at the bottom right.
- Rule 2 (Purple background):** Labeled 'Rule 2' with a 'Delete Rule' link. The 'IF' condition is 'choice\_program' set to 'Text' and 'Equal To' 'Biology'. The 'THEN' action is 'SHOW' for '[LiteralText] text\_biology', with a 'Show/Hide on PDF?' checkbox. There is a 'Save Rules' button at the bottom right.
- Rule 3 (Light Blue background):** Labeled 'Rule 3' with a 'Delete Rule' link. The 'IF' condition is 'choice\_highschool' set to 'Text' and 'Equal To' 'Science Hill'. The 'THEN' action is 'SHOW' for '[LiteralText] text\_sciencehill', with a checked 'Show/Hide on PDF?' checkbox. There is a 'Save Rules' button at the bottom right.

At the bottom left, there is a '<< Back' button and a '+Add a New Rule' button.

Your fields and any options you have included in those fields will automatically be available for use in this tool. You can add as many rules/conditions and as much complexity to each rule as you need.

# Single Signature

By choosing the Single Signature option from the Esign Requirements drop down on the Form Name/Type tab on any form you will force all submitters to first login to Dynamic Forms either through our ETSU Login or by creating a Dynamic Forms account and signing in before completing a form.

Once you have decided to require a login you **no longer need to include Recaptcha** validation in your form.

# Multi-Signature – Add/Edit

## The Wizard

The screenshot shows a web-based 'Workflow Wizard' interface. At the top, there are tabs for 'Form Name / Type', 'Admin Notification', 'Payments', 'Single Sign On', 'Inactive Text', 'Cosigners', and 'Rules/Conditions'. Below the tabs, there's a progress indicator with three checkboxes: 'Overall Progress' (checked), 'Form Routing', 'Owner', and 'Other Participants'. The main heading is 'Welcome to the Workflow Wizard!!'. A paragraph explains the wizard's purpose: 'This Wizard was developed to help you build these more complex multiple signature forms. If you do not wish to use the Wizard, click "Exit Wizard" and build the workflow through our traditional screens.' Under 'Form Workflow Options', there are three radio buttons and corresponding diagrams: 1. 'Workflow 1: Broadcast' with a diagram showing 'Form Owner' pointing to three parallel 'Co-Signer' boxes. 2. 'Workflow 2: Sequential' with a diagram showing a linear flow: 'Form Owner' -> 'Co-Signer 1' -> 'Co-Signer 2' -> 'Co-Signer 3'. 3. 'Workflow 3: Conditional' with a diagram showing 'Form Owner' -> 'Co-Signer 1' -> a decision diamond labeled 'User'. From the diamond, arrows point to 'Co-Signer 2' (labeled 'Designer provided the user ID') and 'Co-Signer 3' (labeled 'Co-Signer 3 Member User'). A red 'STOP' sign is at the end of the flow. At the bottom, there are 'Exit the Wizard' and 'Next' buttons, and a footer with '<< Back' and 'Update Form' buttons.

The Wizard walks the User through each form participant and summarizes the design status after each participant's profile is complete.

**If you are setting up Multi-signature before adding any content** to your form you will default to the Multi-signature Wizard when you click on the Cosigner Tab in form basics.

## Cosigner Tab

Once you have created a form or part of a form and wish to add or make changes to Multi-signature setup you will do so manually via the cosigner tab.

Edit	Name	Owner	Payer	School	Reorder	Delete
	Student	✓				✕
	Office Use Only			✓		✕

At any point you can abandon the current workflow and start from scratch by clicking on the “Start over (launch wizard again)” button at the top of the Cosigner Tab. **You will lose all participants and related info.**

Start over (launch wizard again)

## Multi-Signature – Participants

### Participant Definition

A **PARTICIPANT** is anyone who must sign or fill out any portion of the form before it can be processed. A participant can literally be anyone but by definition includes the form owner, and often the school.

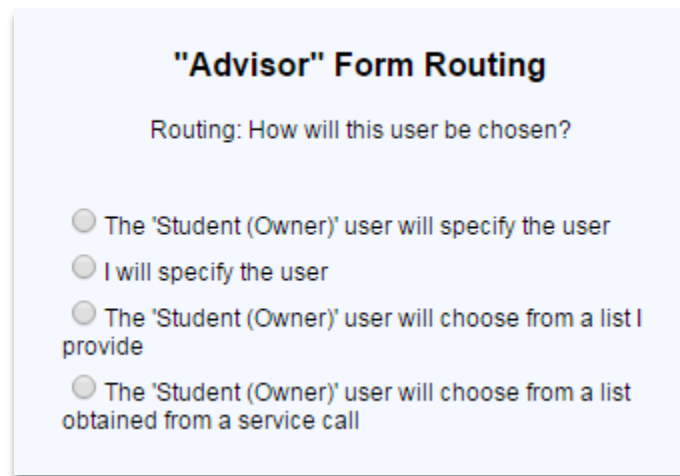
## Cosigner Definition

A **COSIGNER** is anyone who participates in a form after the initial form owner submission. *A form owner may also be a cosigner* for use in special cases where the form routes to a cosigner other than the owner for approval and back to the form owner for additional approval contingent information before the form can be processed.

## Assigned vs. Open

Form builders can predefine all or any cosigners for a given form as the form is being developed. Form builders can also allow the form owner or any participant to set their own cosigners in the process of completing a form. They will have to enter their cosigner's name and email address before signing the form themselves.

Within the form Wizard the form designer is given options for how a form is routed at each step.

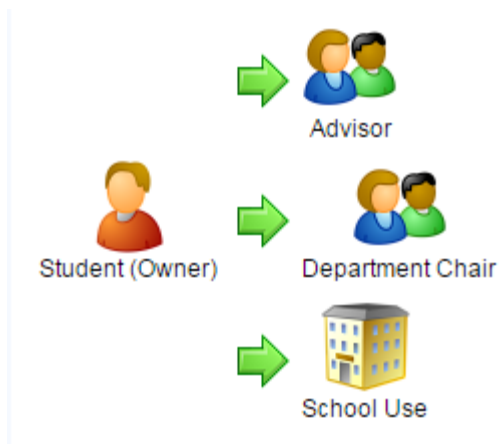


The image shows a screenshot of a dialog box titled "Advisor" Form Routing. The dialog box has a light blue background and a white border. The title is in bold black text. Below the title, the text "Routing: How will this user be chosen?" is displayed. There are four radio button options listed below:

- The 'Student (Owner)' user will specify the user
- I will specify the user
- The 'Student (Owner)' user will choose from a list I provide
- The 'Student (Owner)' user will choose from a list obtained from a service call

## Participant Summary

In the workflow wizard, after you have completed the first participant, the Wizard will show you a summary of the workflow you have created thus far. You are then given the option to add additional participants to the workflow, or to save the workflow as is.



## Multi-Signature – Communications

### Instructions

As you move through the Workflow Wizard, you will be asked to provide custom messaging to the End User to allow them to more easily and accurately complete the form. Instructions are messages that are shown to the End User at specific points in the forms process.

As you continue to add more participants (make more complex forms), it is important for the Forms Designer (the User) to add clear instructions for each of the participants. This will help eliminate errors on forms completion and help avoid the User getting calls to explain how to complete the form.

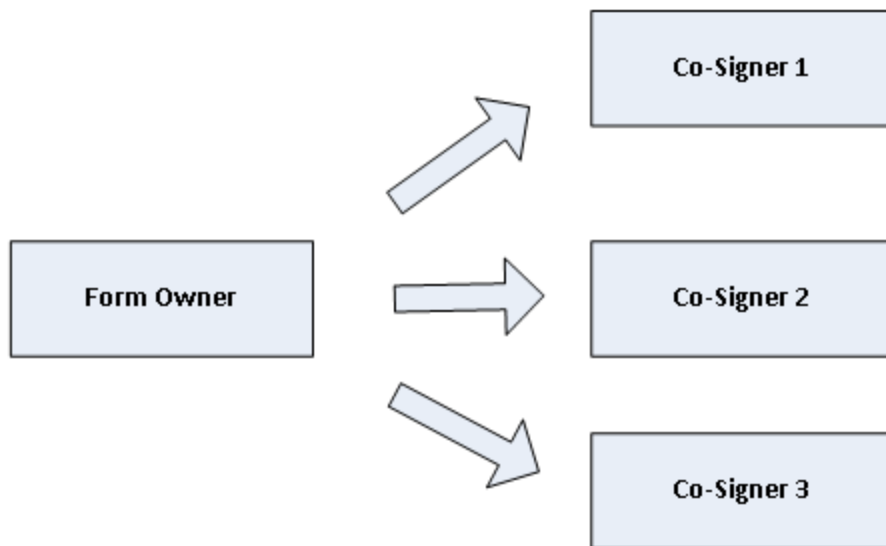
### Confirmation Text

The confirmation text is another method of delivering custom messages to your End Users. After the End User completes the form, the confirmation text will be shown. If you do not have any specific messaging for the End User, it is still always a good practice to include your logo, a thank you note (which confirms receipt of the form), and some instructions on what to do next.

# Multi-Signature - Workflow

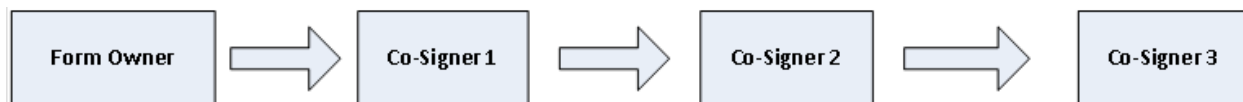
## Broadcast

This process enables users to build a form where after the initial user (or form owner) completes their part of the form, all subsequent co-signers are e-mailed a request to co-sign the form simultaneously.



## Sequential

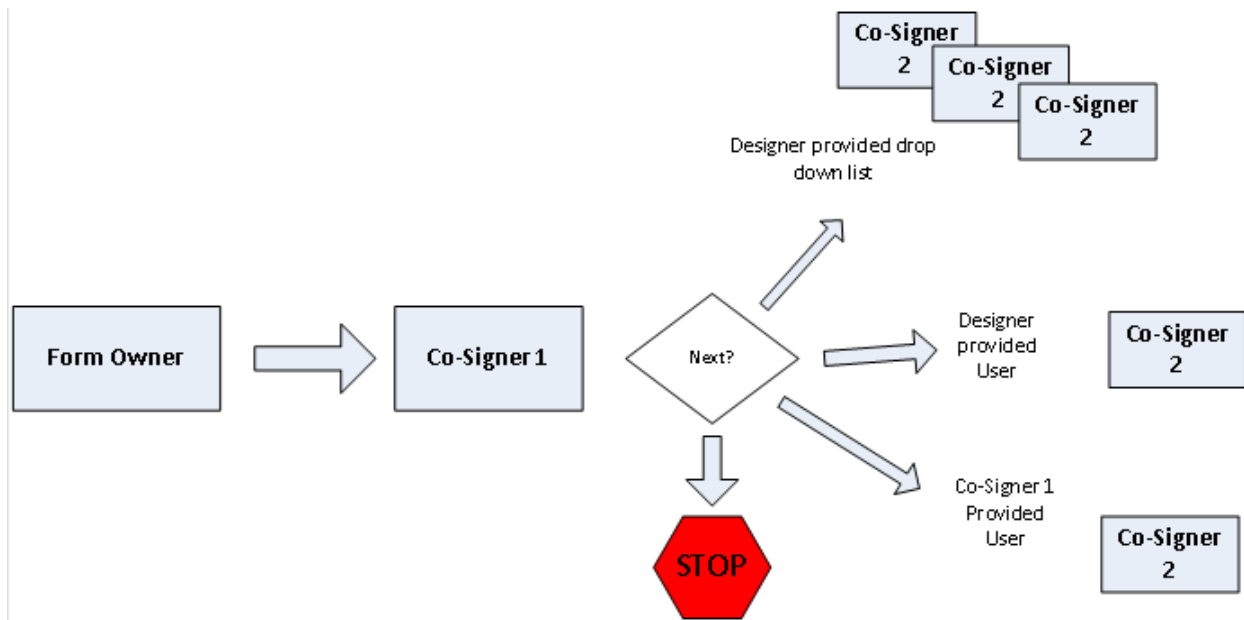
Sequential routing moves the form through pre-determined process one step at a time. All form participants are determined by the designer or identified by the form owner at the start of the form.



## Conditional

The conditional routing functionality provides for more flexibility in determining the co-signer flow. Under this process, the next step in the form routing is determined after the form is completed rather than upfront at the form owner stage.





## Assigning Fields to Participants

In forms requiring multiple signatures each fillable field must be assigned to one participant.

Once multi-signature has been turned on for a form the form designer must assign each fillable/editable field to one of the form participants. Participants are only able to fill in fields which have been assigned to them.

Assigning a field to a participant is done on the “Save your form item” page of the field/item wizard. This is the same page in which you assign the field name and set whether or not a field is required.

### Save your form item

Enter name for your form item:

(NOTE: The form item name must start with a letter and cannot contain spaces or special characters)

shortanswer\_firstname\_prefill

Keeping names consistent across forms helps when doing searches. So, for example, always use "LName" to represent Last Name on any form. Therefore, when searching for a student's form, if you select LName that ensures all forms submitted for student's with that Last Name will be picked up by the search. The list of controls below contains all of the names you have used so far to help you name this one.

Existing form item names:

(Check this list for existing names)

--Click here to see other form fields--

\* Indicates form fields already on this form.

Choose the section:

Student

Require this item?

<< Back Save