

# Information Technology Services

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

*Adding Signatures, Rules and Conditions.*

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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 page 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 a user interface for configuring rules and conditions. It consists of three vertically stacked rule cards, each with a header, an 'IF' condition, and a 'THEN' action. Each card has edit and delete icons in the top right corner.

- Rule 1:** IF choice (as text) is equal to 'Yes' THEN Show [DatePicker] date\_start, show on PDF
- Rule 2:** IF choice (as text) is equal to 'Yes' THEN Show [DatePicker] date\_end, show on PDF
- Rule 3:** IF choice (as text) is equal to 'Yes' THEN Show [LiteralText] text\_section2notes, show on PDF AND Show [HtmlTable] show on PDF

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

Once you have selected the multi-signature option you will need to click on the Participants link in the left navigation to add the form participants.

Name / Type
Admin Notification
Payments
Custom Text
<b>Participants</b>
SSO
Events

Choose your form workflow type: Broadcast to all form participants

Owner may cosign? No

Form Participants						Add New Participant
Participant Name	Owner	Payer	School	Edit	Delete	

## 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 include 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, the form designer is given options for how a form is routed at each step.

How will this participant be designated?

- The 'Student' user will specify the user
- I will specify the user
- The 'Student' user will choose from a list I provide
- The 'Student' user will choose from a list obtained from an API call
- I will specify multiple users / groups

## Participant Summary

The participant view provides a summary of the created workflow that has been created thus far. In this view, you are given the option to add additional participants to the workflow, or to save the workflow as is.

## Multi-Signature - Communications

### Instructions

As you complete the Workflow participant form 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 form process.

As you continue to add more participants (make more complex forms), it is important for Forms Designers (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.

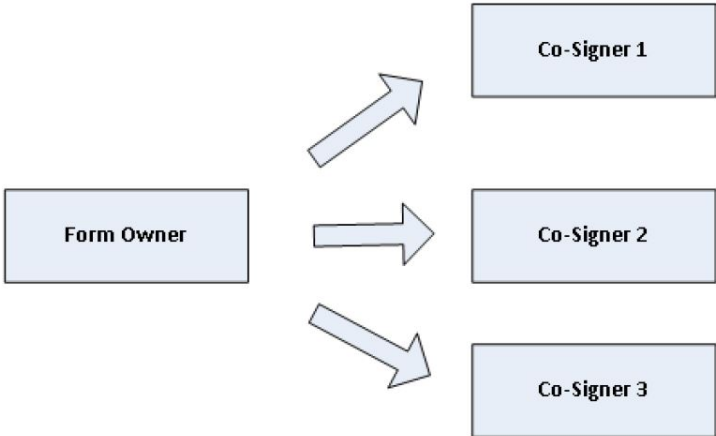
### Confirmation Text

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 -Workflows

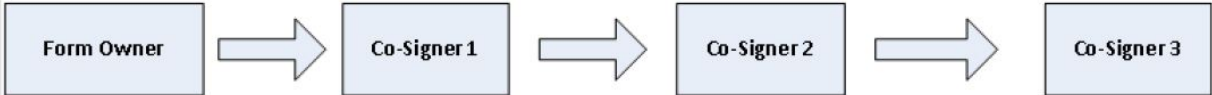
## Broadcast

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.



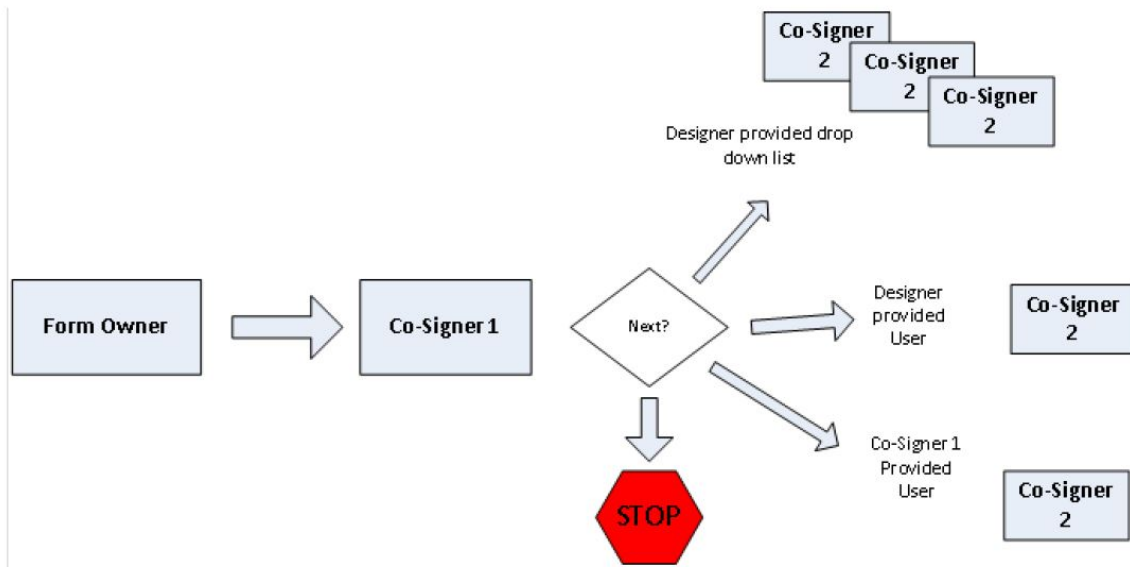
## Sequential

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 that have been assigned to them.

Assigning a field to a participant is done on the “Save your item” page. You assign the field name and set whether or not a field is required in this same page.