



Forms Administrators Dynamic Forms

User Manual

Last Updated: 9/8/2015



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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 our local imaging system, such as BDMS 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 Acrobat Reader 6.0 or higher.

Changing a Profile

Once the user is logged in, there is an **Update Profile** link located in the top right corner of the screen.



Home Search System Admin Reports Help My Forms **Update Profile** Logout

My institutions: Pellissippi State - Academic Affairs - Nursing Change Institution

Change Account Settings

NOTE: You are logged into Dynamic Forms using your institution credentials. As a result, some parts of your account may not be editable.

Name: [] Edit

User name: SS05MGACSK6ONTE4TQFAUIODL14C1AAE665aschulte Edit

Email: [] Edit

Password: [] Edit

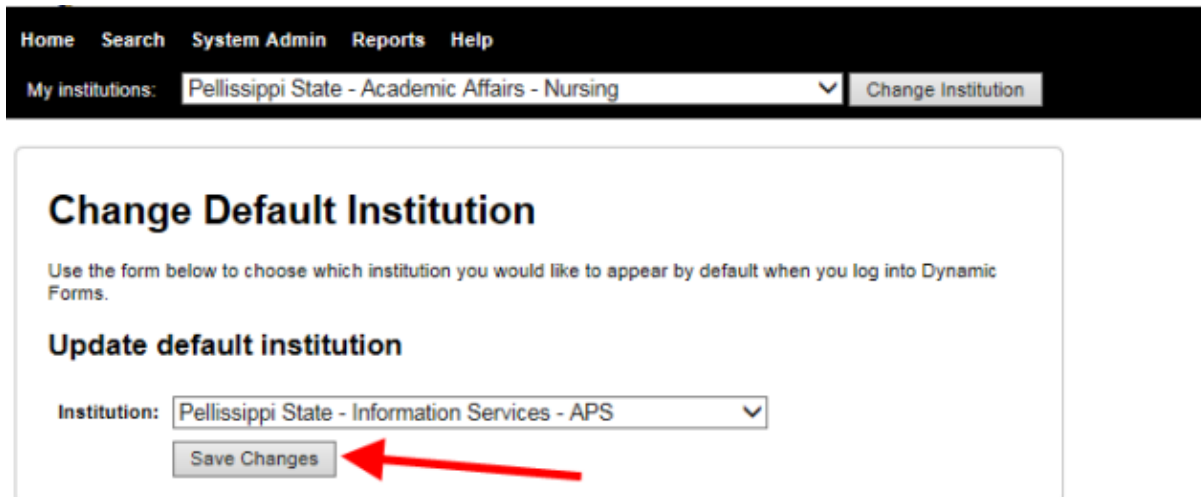
Secret Question: What is your mother's maiden name? [] Edit

Default Institution: Pellissippi State - Information Services - APS **Edit**

For all Pellissippi State Form users there is only one type of information that can be changed:

The Default Institution. This is for users assigned to multiple department forms.

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 Search System Admin Reports Help

My institutions: Pellissippi State - Academic Affairs - Nursing Change Institution

Change Default Institution

Use the form below to choose which institution you would like to appear by default when you log into Dynamic Forms.

Update default institution

Institution: Pellissippi State - Information Services - APS

Save Changes



Home Page Navigation

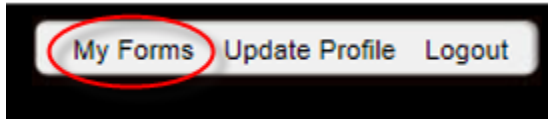
Throughout Dynamic Forms there are navigation tabs located at the top of each page, which are used for navigation purposes. These tabs include:

- **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 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.

The screenshot shows the top navigation bar with tabs: Home, Search, System Admin, Reports, Help. On the right, there are links for My Forms, Update Profile, and Logout. Below the navigation bar, the current institution is set to "PELLISSIPPI STATE - Academic Affairs - Business & Computer Tech". The main content area displays "PELLISSIPPI STATE - Academic Affairs - Nursing Forms" with a link to "See Page Help". Below this, there are three action buttons: "MOVE SELECTED TO FOLDER", "MANAGE FOLDERS", and "ADD A NEW FORM". A table titled "Forms/Folders" lists two forms:

	Multi	Pend	Prccd	Arch	
<input type="checkbox"/> Nursing Admission Application Bridge (fill out form)	0	0	0	0	URL X
<input type="checkbox"/> Nursing Admission Application Traditional Pathway (fill out form)	0	0	0	0	URL X

My Forms



There are additional options in the top right of your screen. **Update Profile** discussed in Page 4 above and **Logout** will do just that. If you click on **My Forms**, you will then be taken to the following screen.

Welcome to Dynamic Forms!

This page offers you access to your [Pending / Draft Forms](#) and your completed [Forms History](#). If you need to start a new form, please go to your college or university website to access a link to the proper form.

Thank you for using Dynamic Forms!



[Pending / Draft Forms](#)



[Forms History](#)

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.

To return to the admin pages, simply click on:

[Go To Forms Administration](#)

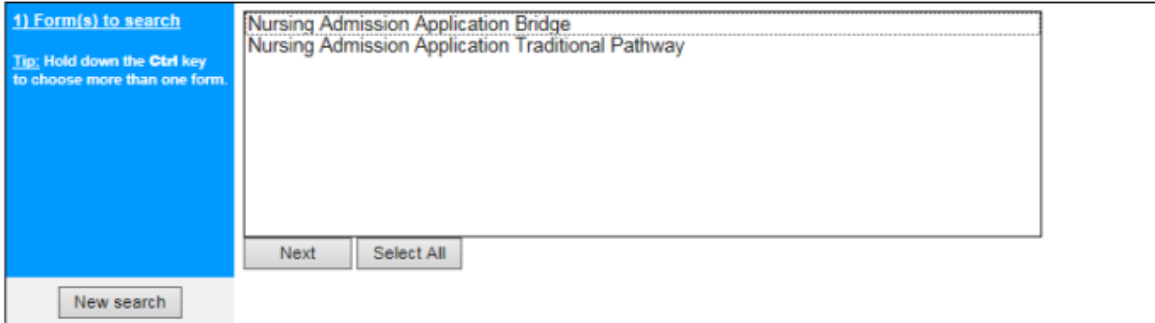
Forms Search


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 

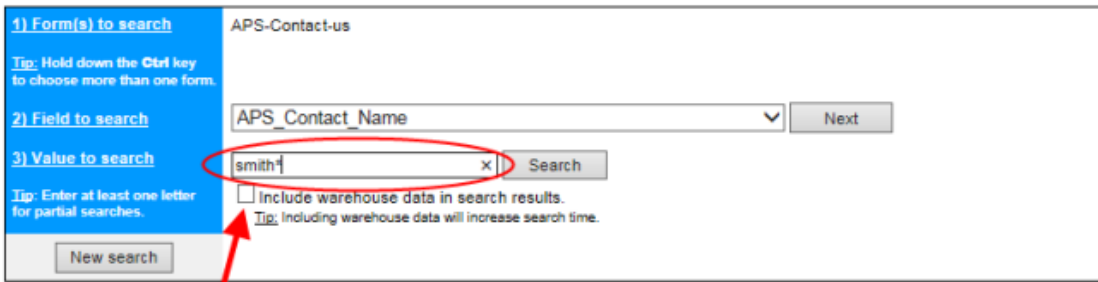
You can select more than one form by using your ctrl key and your mouse. You can also select all forms by simply clicking on Select All


Search [\(See Page Help\)](#)



Then, select the field you would like to search and click . 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. Field names from list of available fields to choose from might be confusing, this is due to naming conventions used during the Form Design process.

Search [\(See Page Help\)](#)

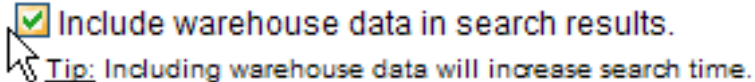


Next, simply select the field you wish to search by. Finally, enter the value, (use * for any value) for which you wish to search and click . Dynamic Forms will return the search results in the bottom half of the window.

Note:

To search for an exact value, such as the last name Smith, enter the full text string *Smith* in the field. To search for a partial value, simply enter one or more letters into the 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.

Search (See Page Help)

<p>1) Form(s) to search</p> <p><small>Tip: Hold down the Ctrl key to choose more than one form.</small></p> <p>2) Field to search</p> <p>3) Value to search</p> <p><small>Tip: Enter at least one letter for partial searches.</small></p> <p><input type="button" value="New search"/></p>	<p>Exit Questionnaire</p> <p>Exit Name <input type="button" value="Next"/></p> <p>harmon <input type="button" value="Search"/></p> <p><input type="checkbox"/> Include warehouse data in search results. <small>Tip: Including warehouse data will increase search time.</small></p>
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Search Results:

View PDF	HTML	Processed	Searched value matches	Form Name	SubmitDate
		●	Joannie Harmon	Exit Questionnaire	8/18/2015 7:58:00 AM



Retrieving Your Data

The **Home** tab displays a list of all of the forms. Each form contains three columns, **Multi-Signature**, **Pending**, **Processed**, and **Archived**.

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.

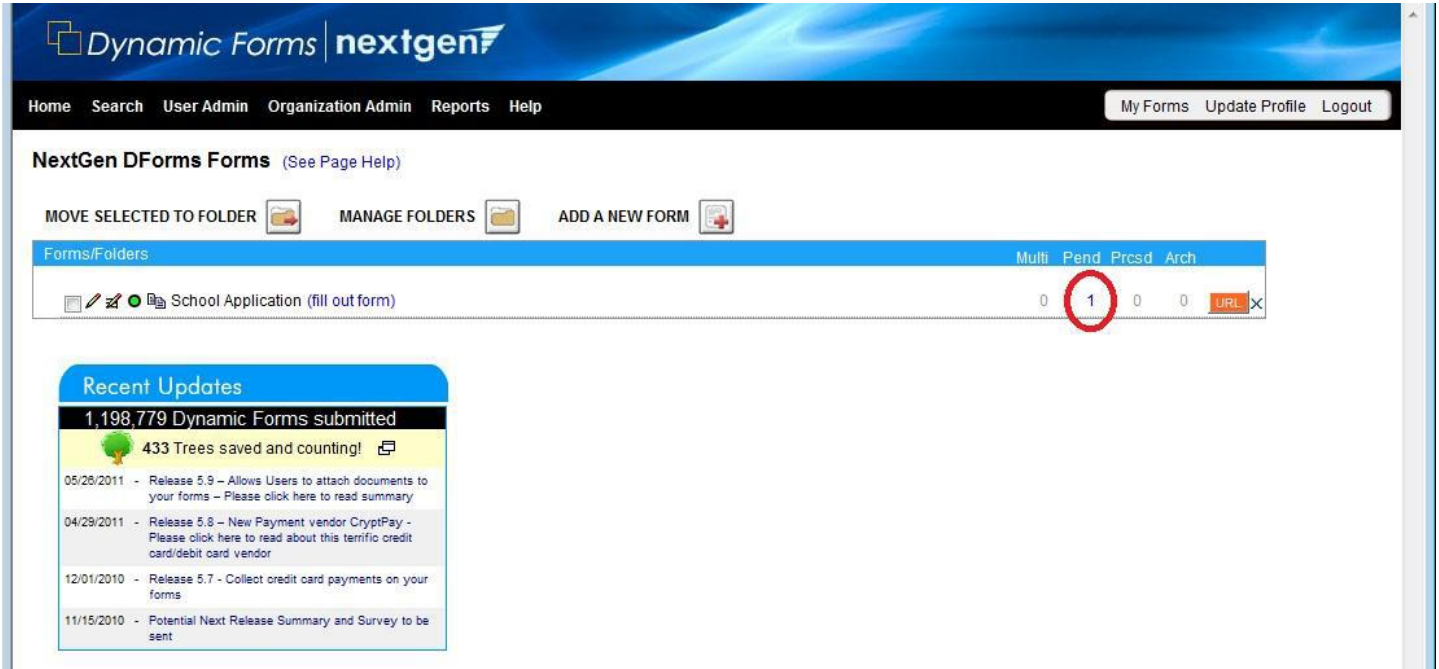
Processed Queue

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.



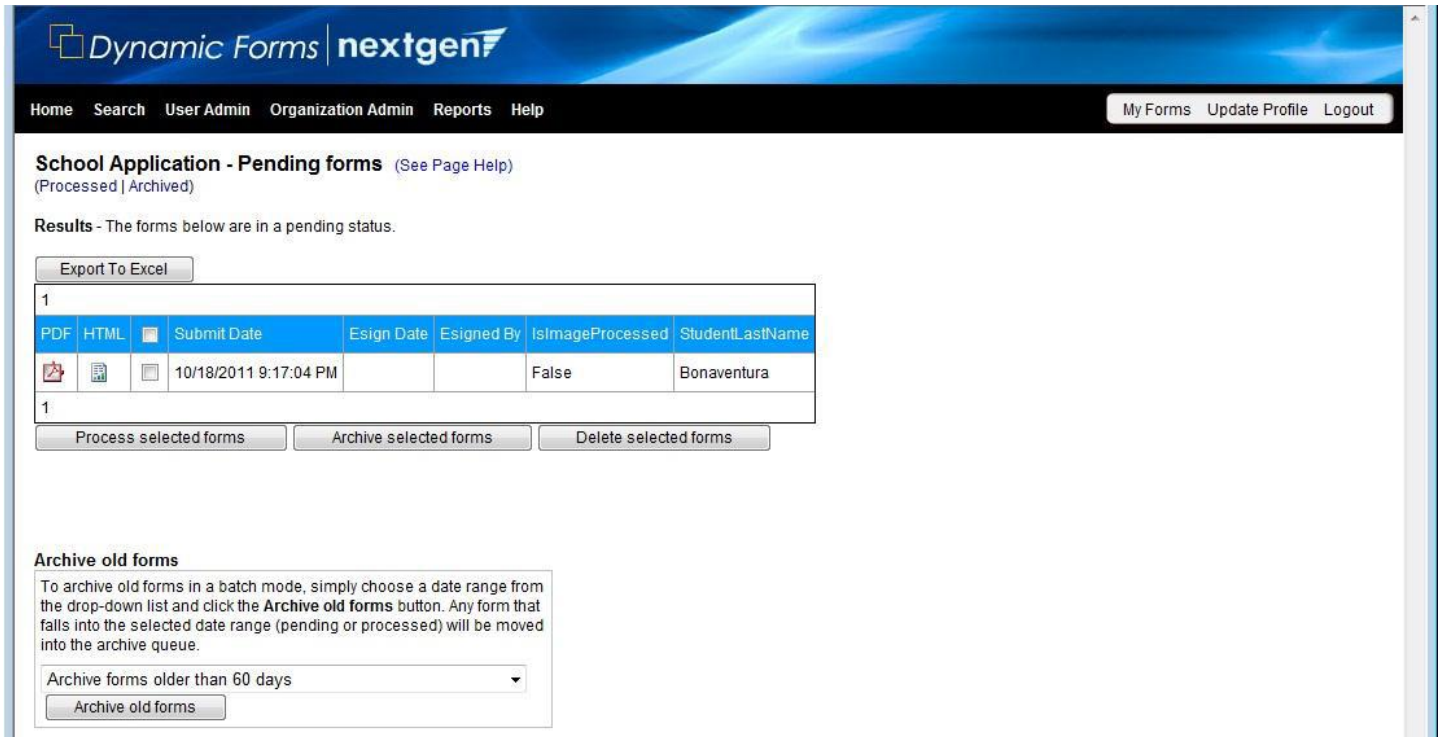
The screenshot shows the Dynamic Forms NextGen interface. At the top, there is a navigation bar with links for Home, Search, User Admin, Organization Admin, Reports, and Help. On the right side of the navigation bar, there are links for My Forms, Update Profile, and Logout. Below the navigation bar, the main content area is titled "NextGen DForms Forms (See Page Help)". There are three action buttons: "MOVE SELECTED TO FOLDER", "MANAGE FOLDERS", and "ADD A NEW FORM". Below these buttons is a table with the following structure:

Forms/Folders	Multi	Pend	Prsd	Arch
   School Application (fill out form)	0	1	0	0

The number "1" in the "Pend" column is circled in red. Below the table, there is a "Recent Updates" section with the following content:

- 1,198,779 Dynamic Forms submitted
- 433 Trees saved and counting!
- 05/26/2011 - Release 5.9 - Allows Users to attach documents to your forms - Please click here to read summary
- 04/29/2011 - Release 5.8 - New Payment vendor CryptPay - Please click here to read about this terrific credit card/debit card vendor
- 12/01/2010 - Release 5.7 - Collect credit card payments on your forms
- 11/15/2010 - Potential Next Release Summary and Survey to be sent

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.



Dynamic Forms | nextgen

Home Search User Admin Organization Admin Reports Help My Forms Update Profile Logout

School Application - Pending forms (See Page Help)
(Processed | Archived)

Results - The forms below are in a pending status.

Export To Excel

1	PDF	HTML	Submit Date	Esign Date	Esigned By	IsImageProcessed	StudentLastName
1			10/18/2011 9:17:04 PM			False	Bonaventura

Process selected forms Archive selected forms Delete selected forms

Archive old forms

To archive old forms in a batch mode, simply choose a date range from the drop-down list and click the **Archive old forms** button. Any form that falls into the selected date range (pending or processed) will be moved into the archive queue.

Archive forms older than 60 days

Archive old forms

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

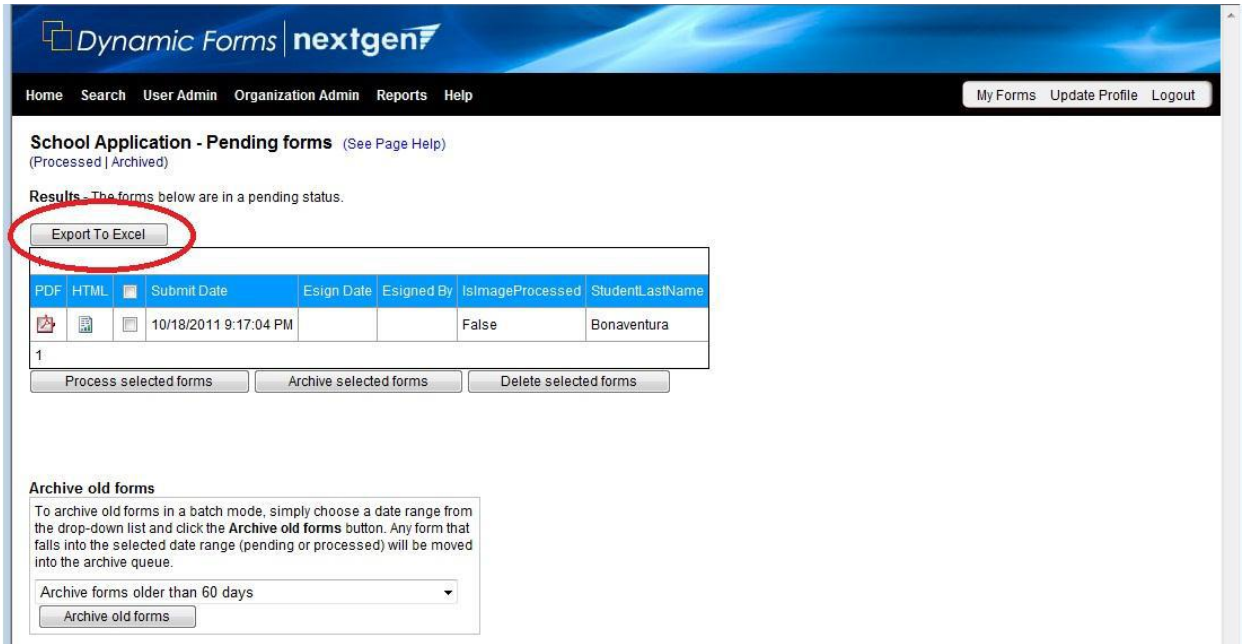
Processed and **Pending** forms can be moved into an **Archive** queue at any time. The system can also be used to archive all forms that are older than **60 days**, **90 days**, or **120 days**.

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.

Export to Excel



Dynamic Forms nextgen7

Home Search User Admin Organization Admin Reports Help My Forms Update Profile Logout

School Application - Pending forms (See Page Help)
(Processed | Archived)

Results - The forms below are in a pending status.

Export To Excel

PDF	HTML	Submit Date	Esign Date	Esigned By	IsImageProcessed	Student.LastName
		10/18/2011 9:17:04 PM			False	Bonaventura

1

Process selected forms Archive selected forms Delete selected forms

Archive old forms
To archive old forms in a batch mode, simply choose a date range from the drop-down list and click the **Archive old forms** button. Any form that falls into the selected date range (pending or processed) will be moved into the archive queue.

Archive forms older than 60 days

Archive old forms

You can click on the **Export to Excel** button to create an excel file with all the form data. Follow the onscreen instructions and Microsoft Excel should load with all your data in one file. This feature is not document specific; meaning all files in your que will be imported into Excel.