Information Technology Services

Dynamic Forms:
Advanced Form Building

Adding Signatures, Rules and Conditions.

Contents

Table of Contents

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.

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.

Electronic Signature

Single Signature and Multiple Signature forms two forms of flow
- A participant completes the form and is then presented with the electronic

signature page. On this page, the user can:

- Review the Consent and Disclosure Statement (per E-Sign Law)
- Opt-In and electronically sign the form – or –
- Opt-out, view and print the PDF perform a wet signature and turn the form in

- Electronic Signatures are encrypted/hashed and stamped on form – always at the bottom of the form

Current E-Sign Flow

Electronic Signature

Please read the Disclosure / Consent before you sign your form electronically.

Typing your name exactly as it appears below signifies you are completing this form using an electronic signature. By signing electronically, you are certifying that you have read and understand the Disclosure/Consent and agree to electronically sign. You also agree to receive required disclosures or other communications related to this transaction electronically.

To continue with the electronic signature process, please enter your name and click the "Sign Electronically" button to save your information and submit your electronic signature.

Jim

Grace

[Previous] [Sign Electronically]

Disclosure statement

Opt-In/Sign

Signing electronically above is the fastest, most efficient way to submit your information to Lee University. If you choose to opt out, processing time may be delayed by 2 to 3 weeks.

If you choose to opt out by clicking the "Opt out and print" link below, you understand that you must print and submit the form and accompanying documentation (if appropriate) and follow the instructions on the next page to submit the form to Lee University.
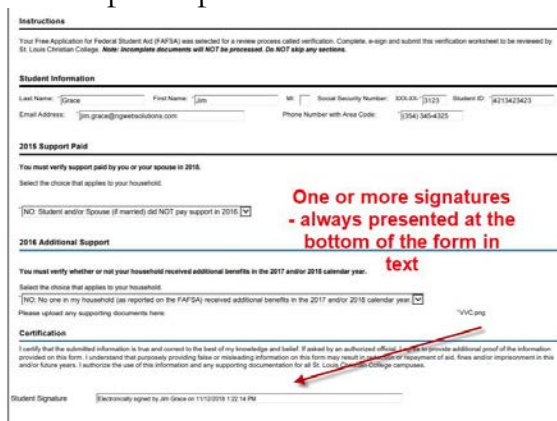Opt out and print

Opt-Out - Wet Sign

Now each participant goes through the exact same process and once the user opts in to the electronic signature process, the signature is:

- Represented as an unalterable text line at the end of the form
- Each additional participant's signature will be presented under the previous participant's

Instructions

Your Free Application for Federal Student Aid (FAFSA) was selected for a review process called verification. Complete, e-sign and submit this verification worksheet to be reviewed by St. Louis Christian College. **Note: Incomplete documents will NOT be processed. Do NOT skip any sections.**

Student Information

Last Name: Grace   First Name: Jim   MI: Social Security Number: XXX-XX- 3123   Student ID: 4213423423
Email Address: jim.grace@isgwebsolutions.com   Phone Number with Area Code: (354) 345-4325

2015 Support Paid

You must verify support paid by you or your spouse in 2016.

Select the choice that applies to your household.

[NO: Student and/or Spouse (if married) did NOT pay support in 2016 ▼]

One or more signatures - always presented at the bottom of the form in text

2016 Additional Support

You must verify whether or not your household received additional benefits in the 2017 and/or 2018 calendar year.

Select the choice that applies to your household.

[NO: No one in my household (as reported on the FAFSA) received additional benefits in the 2017 and/or 2018 calendar year ▼]

Please upload any supporting documents here   VVC.png

Certification

I certify that the submitted information is true and correct to the best of my knowledge and belief. If asked by an authorized official, I agree to provide additional proof of the information provided on this form. I understand that purposely providing false or misleading information on this form may result in denial or repayment of aid, fines and/or imprisonment in this and/or future years. I authorize the use of this information and any supporting documentation for all St. Louis Christian College campuses.

Student Signature   Electronically signed by Jim Grace on 11/12/2018 1:22:14 PM

New Signature Widget Includes initials and date also

Users will now have functionality to place a "signature widget" any place on the form rather than having the signature(s) at the bottom of the form.
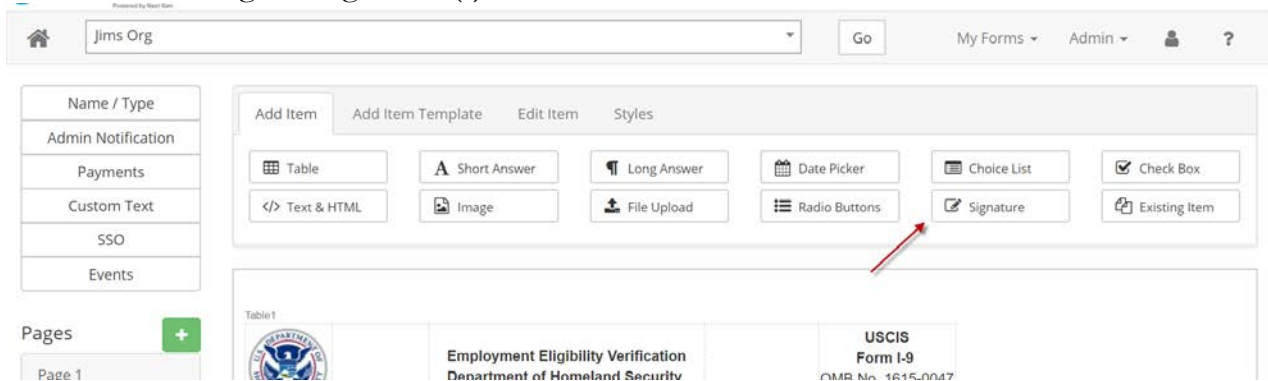
Features/Rules for the signature widget are:
- There is no need to "opt-in" for this feature – the only thing designers need to do is add a signature widget to a signature form.
- Form Designers cannot place a signature widget on a No Signature form
- If you choose, a date can be selected with that signature widget, and that date will be updated if forms are rejected, etc.
- Like all other page items, signature widgets must be assigned to a participant
- Form participants will be presented with the identical E-Sign compliant language when asked to electronically sign
- Opt-out: users will be shown a PDF of the form once they choose to opt-out – similar to today. Like today, there is a warning and then a no-going back option.
- There can be multiple signature widgets on a form – either because multiple participants are being requested to sign the form – or – you are asking one participant to sign the form in two or more different places on the form.
- If there is no signature widget placed on a signature form, the now "old" signature process will be performed – meaning participants will see the current electronic signature page. This also means that if you have a form with four signatures, and only three signature widgets are placed on the form, three participants will sign with the new widget and one participant will see the signature page. That also means that the single signature will show at the bottom of the form.
- On signature widget forms, the "Submit" button will appear – as once they are completed with that page of the form, they have submitted the form. We have added an optional "Are you sure?" prompt which can be turned off.

New yellow signature area

The same Opt-In / Opt-Out language is presented

User will see a representation of his/her signature on the form where the widget was placed

Employment Eligibility Verification
Department of Homeland Security
U.S. Citizenship and Immigration Services

?START HERE: Read instructions carefully before completing this form. The instructions must be availab̶ form. Employers are liable for errors in the completion of this form.

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employ̶ present to establish employment authorization and identity. The refusal to hire or continue to employ an i̶ expiration date may also constitute illegal discrimination

Section 1. Employee Information and Attestation (Employees must complete and sign Section 1 of F̶ day of employment, but not before accepting a job offer.)

Last Name *(Family Name)*	First Name *(Given Name)*	Middle Initial

Address *(Street Number and Name)*	Apt. Number	City or Tow̶

Date of Birth *(mm/dd/yyyy)*	U.S. Social Security Number	Employee's E-mail Address

I am aware that federal law provides for imprisonment and/or fines for false statements or use of ̶ form.
I attest, under penalty of perjury, that I am (check one of the following boxes):

...3837323933

Jim Grace
Signature

11/16/2018, 2:02 PM
Date

Submit Form

Signature Widget – More Options

- Add either a Signature to the form – or
- If more appropriate - Add Initials to the form

Add Signature   ×

Format	Signature ▾
	Signature
Include date?	Initials
Date Location	Right ▾

Cancel   Add Item

- Add a signature date field to the form – or not!
- If you do, you can add it to the right, left, above or below the signature or initials
- And once the date is added to the form, it can be moved to other parts of the form as well

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.

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 routs 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

How will this participant be designated?

- ○ The 'form submitter' user will specify the user
- ● I will specify the user
- ○ The 'form submitter' user will choose from a list I provide
- ○ The 'form submitter' user will choose from a list obtained from an API call
- ○ I will specify multiple users / groups
- ○ The participant will be designated from values collected on the form

step.

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.
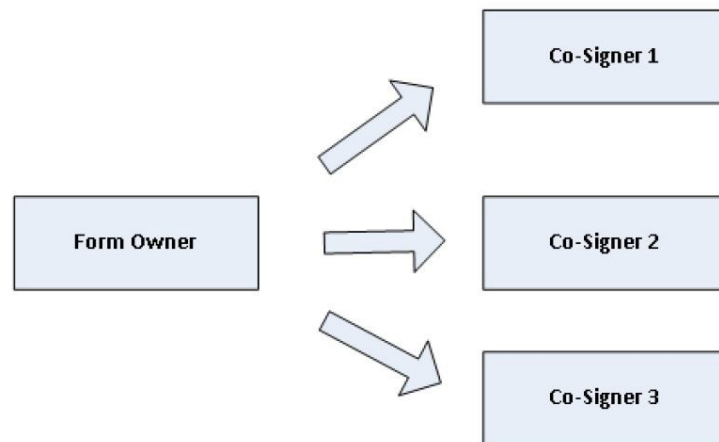

Sequential

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.
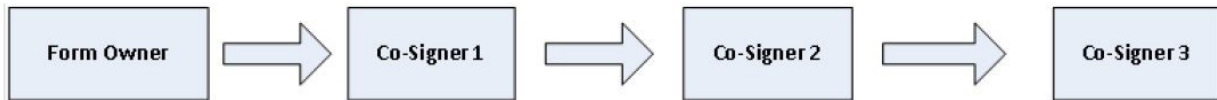
Conditional

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.
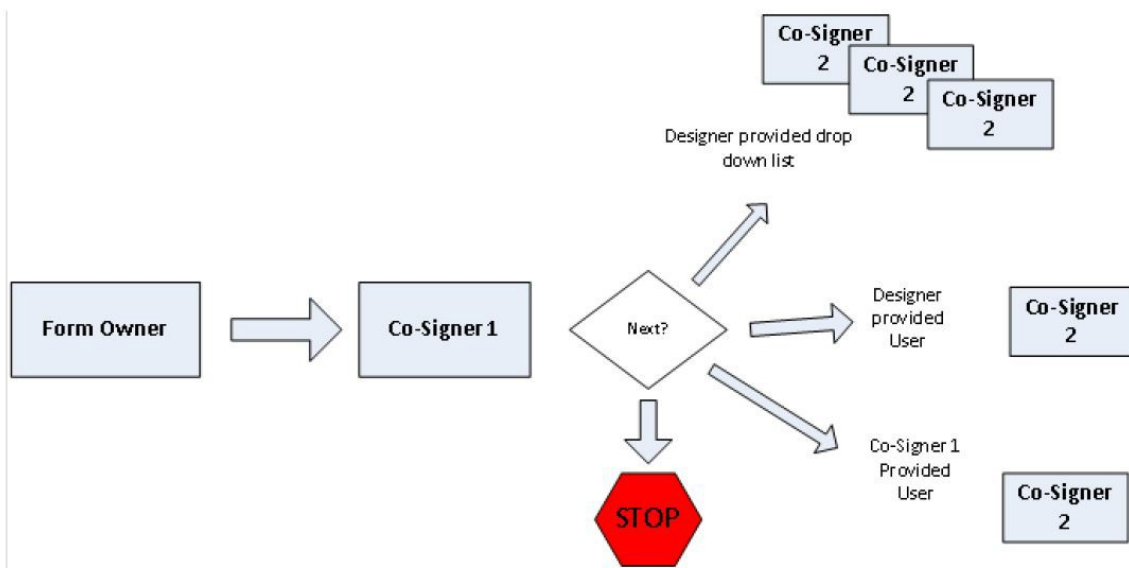
Assigning Fields to Participants

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.

New Button and New Prompt Options

- As designers use the new widget, end users will now be able to submit the form without going to the Dynamic Forms electronic signature page. Therefore we have replaced the button on the form page – it will now show "Submit" instead of "Next"

- Dynamic Forms still does field level requirement checks on the form before so users cannot submit a form without that check. However, we wanted to ensure that if the form designer wants to provide the user with a prompt before submitting the form, we have included that feature on the Name/Type tab on the Designer.

- We have set this to default to "Yes" on all forms including a signature widget and we have given the form designer two options:

    - Remove the prompt – so no prompt (you can see an example on the next page)

    - Customize the prompt displayed to the user (otherwise the default prompt text will be used)

Prompt User Before Submitting Form?	Yes	Use Custom Prompt Text?	No

- After hitting the "Submit" button, form designers have the option to include this customizable confirmation prompt.

- Again, Dynamic Forms will still perform all required field checks before allowing the user to submit the form.