



TEXAS A&M
UNIVERSITY
CENTRAL TEXAS™

Dynamic Forms:
Do you like saving
time and money?

Getting Started

- ▶ Meeting NextGen
- ▶ Demos
- ▶ Putting our first form to use
- ▶ Dynamic Forms took a nap
- ▶ VA office led the way



Sandbox

- ▶ Learning our way around the sandbox
- ▶ Form Names
- ▶ Library Of Objects

The screenshot shows the 'Form Templates' page in the sandbox environment. At the top left is the Texas A&M University Central Texas logo. Below it is a search bar with the text 'Can't find your form?'. A cookie consent banner is visible below the search bar. The main content area is titled 'Form Templates' with a count of 83 and 'Selected 1 orgs'. A search input field is on the right. Below this is a table with columns for 'Active', 'Form Name', and 'Returned'. The table lists several forms, each with a checkbox, an 'Active' status (Yes/No), the form name, a 'Sandbox' label, a star icon, and a 'Returned' count.

<input type="checkbox"/>	Active	Form Name ↑	Returned
<input type="checkbox"/>	Yes	** BDM DF Project Financial Aid Revision Request Form	0
<input type="checkbox"/>	Yes	**LIBRARY** do not delete	0
<input type="checkbox"/>	Yes	Accessibility Exception Request	0
<input type="checkbox"/>	Yes	Account Creation Form	0
<input type="checkbox"/>	Yes	Adjunct Form	0
<input type="checkbox"/>	No	Admissions Change of Semester form	0



Basic Form Layout



Office of the Provost
1001 Leadership Place
Founder's Hall, Suite 429
Killeen, TX 76549

Name:
Email:
Dear

Texas A&M University-Central Texas is pleased to offer you the position of Adjunct Faculty to teach the following course(s):

Course Name	Course Number and Section	Salary
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

This is a one semester position beginning:
This position ends:

Your salary will be available beginning the month after
your first full month of employment in the amount of:

Faculty teaching assignments may require various delivery systems, such as online and video conferencing, and a variety of locations and times. A outlined by the academic rules and procedures.

Please indicate your acceptance of the proposed terms of this appointment by checking the appropriate box, signing, and returning this letter.

If you believe you may need a reasonable accommodation to fulfill your job duties, please contact Tina Flores-Nevarez, Director of Human Resources.

Welcome to Texas A&M University-Central Texas.

Sincerely,

Provost and Vice President
for Academic and Student Affairs
Professor of Nursing
Distinguished Graduate Faculty

Please select your appointment decision:

Your Email:



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Adding Objects

Navigation tabs: Add Item, Add Item Template, Edit Item, Styles

Object selection buttons:

- Layout Table (highlighted with a yellow border)
- Text & HTML (highlighted with a yellow border)
- Short Answer
- Long Answer
- Image
- File Upload

TableLogo

	TEXAS A&M			
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Object selection buttons:

- Date Picker
- Choice List
- Check Box
- Radio Buttons
- Signature
- Existing Item

- ▶ Drag and Drop
- ▶ Layout Tables
- ▶ Text & HTML
- ▶ Short Answer
- ▶ Choice List



Layout Table

Add Item Add Item Template Edit Item Styles

Layout Table Short Answer Long Answer

Text & HTML Image File Upload

TableIntroduction

Name:	Field_name
Email:	Field_email
Dear	Choice_greeting ▾

Add Item Add Item Template Edit Item Styles

Name: TableIntroduction Width: 600

Rows: + Add - Remove Columns: + Add - Remove

Name:

Email:

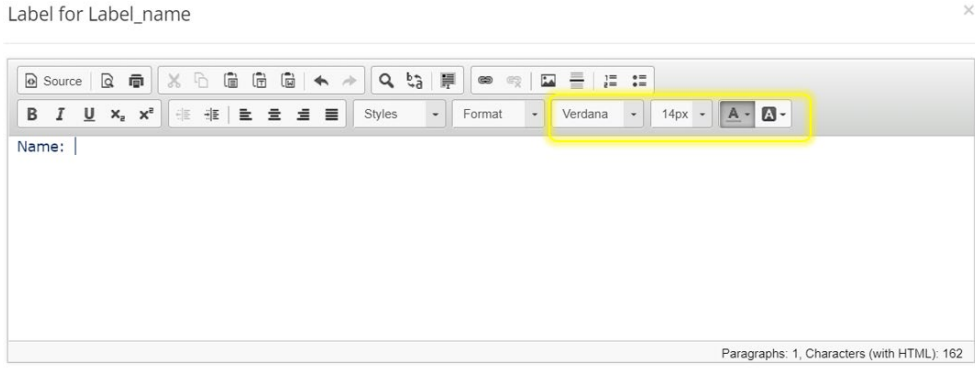
Dear:



Text and HTML

Name

Text Name:



Label for Label_name



TableIntroduction

Name:	<input type="text" value="Field_name"/>
Email:	<input type="text" value="Field_email"/>
Dear	<input type="text" value="Choice_greeting"/>

Name:

Email:

Dear



Short Answer

Add Item Add Item Template Edit Item Styles

Layout Table **Short Answer** Image

Text & HTML

TableIntroduction

Name:	Field_name
Email:	Field_email
Dear	-- Please Select --

Advanced Save Delete

Rules

Settings for Field_email

Field Type: Generic Answer

Minimum Length: []

Label Position: []

Custom CSS classes: Email address

Custom Validation Text: []

Tooltip: []

Tooltip Position: []

Mask input?

Name: []

Email: [L@_]

Dear: -- Please Select --

Name: []

Email: [dbrewer@_] **Please enter a valid email address.**

Dear: -- Please Select --

Name: []

Email: [dbrewer@tamuct.edu]

Dear: -- Please Select --

03d626c2-8fe0-4dfb-b7c7-5cb4087d1321

Cancel Save



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Choice List

Choice List

Choice List

TableIntroduction	
Name:	Field_name
Email:	Field_email
Dear	Choice_greeting ▾

Add Item | Add Item Template | Edit Item | Styles

Name: Choice_greeting | Width: 150 | Required? | **Advanced** | Save | Delete

Label: Greeting | Hide label? | Accessibility Label: Label_greeting

Settings for Choice_greeting

Default entry text: -- Please Select --

Items: Manual | API

Value	Description	<input type="checkbox"/>	<input type="checkbox"/>
Dr.	Dr.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mr.	Mr.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mx.	Mx.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ms.	Ms.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mrs.	Mrs.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Label Position: Left

Custom CSS classes:

Custom Validation Text:

Tooltip:

Tooltip Position:

Cancel Save

Name:

Email:

Dear:

- Dr.
- Mr.
- Mx.
- Ms.
- Mrs.
- Miss



Rules

Add Item Add Item Template Edit Item Styles

Name: Width: Required? Hide label? Accessibility Label:

Label:

Rules for Choice_greeting

You don't have any rules for this page item.

[Rules for Other Items](#)

Rules for Choice_greeting

New Rule

	Item	Treat Value As	Comparison	Value	
IF	<input type="text" value="Choice_greeting"/>	<input type="text" value="Text"/>	<input type="text" value="Equal To"/>	<input type="text" value="Dr."/>	<input type="button" value="x"/>
	<input type="button" value="OR"/>				
	<input type="text" value="Choice_greeting"/>	<input type="text" value="Text"/>	<input type="text" value="Equal To"/>	<input type="text" value="Mx."/>	<input type="button" value="x"/>
	<input type="button" value="OR"/>				
	<input type="text" value="Choice_greeting"/>	<input type="text" value="Text"/>	<input type="text" value="Equal To"/>	<input type="text" value="Ms."/>	<input type="button" value="x"/>
	<input type="button" value="OR"/>				
	<input type="text" value="Choice_greeting"/>	<input type="text" value="Text"/>	<input type="text" value="Equal To"/>	<input type="text" value="Mrs."/>	<input type="button" value="x"/>
	<input type="button" value="OR"/>				
	<input type="text" value="Choice_greeting"/>	<input type="text" value="Text"/>	<input type="text" value="Equal To"/>	<input type="text" value="Miss"/>	<input type="button" value="x"/>
	<input type="button" value="OR"/>				
THEN	<input type="text" value="SHOW"/>	<input type="text" value="[HtmlTable] TableDoctor"/>	<input checked="" type="checkbox"/> Show/Hide on PDF?		<input type="button" value="x"/>

Rules for Other Items

New Rule

	Item	Treat Value As	Comparison	Value	
IF	<input type="text" value="Choice_greeting"/>	<input type="text" value="Text"/>	<input type="text" value="Equal To"/>	<input type="text" value="Mr."/>	<input type="button" value="x"/>
	<input type="button" value="OR"/>				
	<input type="text" value="Choice_greeting"/>	<input type="text" value="Text"/>	<input type="text" value="Equal To"/>	<input type="text" value="Mx."/>	<input type="button" value="x"/>
	<input type="button" value="OR"/>				
	<input type="text" value="Choice_greeting"/>	<input type="text" value="Text"/>	<input type="text" value="Equal To"/>	<input type="text" value="Ms."/>	<input type="button" value="x"/>
	<input type="button" value="OR"/>				
	<input type="text" value="Choice_greeting"/>	<input type="text" value="Text"/>	<input type="text" value="Equal To"/>	<input type="text" value="Mrs."/>	<input type="button" value="x"/>
	<input type="button" value="OR"/>				
	<input type="text" value="Choice_greeting"/>	<input type="text" value="Text"/>	<input type="text" value="Equal To"/>	<input type="text" value="Miss"/>	<input type="button" value="x"/>
	<input type="button" value="OR"/>				
THEN	<input type="text" value="SHOW"/>	<input type="text" value="[HtmlTable] TableAdjunct"/>	<input checked="" type="checkbox"/> Show/Hide on PDF?		<input type="button" value="x"/>

Name:
Email:
Dear

We are offering you an Assistant Professor position.

Name:
Email:
Dear

We are offering you an adjunct position.



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Forms Administration

Form: Adjunct Form

Org: TAMUCT - Sandbox

Name / Type
Admin Notification
Payments
Custom Text
Participants
SSO
Events
Advanced

Pages



Page 1

Preview in Browser

Preview as PDF

Last updated:

Dawn Hill May 3, 2022, 9:42:05 AM

Name

Adjunct Form

Display Name

Adjunct Form

Description

Adjunct contract letter form

Esign Requirements

Multiple Signatures

Duplicate E-signature Check

Ignore duplicate submissions

How often should reminder emails be sent to form participants?

Reminder emails will only be sent for up to 90 days

(For rejected forms, reminders are sent indefinitely or until form is deactivated)

Don't send reminder emails

Owner notification email options

At Each Step

Don't send reminder emails

Custom opt-out notification

Rich text editor toolbar with options for Source, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Styles, Format, Font, Size, and Font Color.

Allow Drafts to be Saved

Yes

Show form timer?

No

Show welcome screen?

Yes

Use Recaptcha validation?

No

Use Automatic Activation?

No

Prompt User Before Submitting Form?

For use with forms using a signature widget or no signature forms

No

Notify Users When Rejected Over?

No

Allow External Users?

No

Your changes have not been saved.

Save



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Forms Administration



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We use cookies on our website to give you the most relevant experience by remembering your preferences and repeat visits. By

Form: Adjunct Form

Org: TAMUCT - Sandbox

Name / Type
Admin Notification
Payments
Custom Text
Participants
SSO
Events
Advanced

Notification Frequency

Every form

Notification email recipient(s) Note: Separate email addresses with a semicolon (;)

dbrewer@tamuct.edu; enterpriseapps@tamuct.edu

Only notify the admin after all signatures have been collected?

Yes

Use custom email?

No

Pages



Page 1

Preview in Browser

Preview as PDF

Last updated:
Dawn Hill May 3, 2022, 9:42:05 AM



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Participants

Form: Adjunct Form

Org: TAMUCT - Sandbox

Name / Type
Admin Notification
Payments
Custom Text
Participants
SSO
Events
Advanced

Choose your form workflow type

- Broadcast to all form participants
- Broadcast to all form participants
- Route the form sequentially as each section is completed**
- Let each form participant decide where the form is routed next
- Conditional Routing

Hide unused signature lines?

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

Add Participant

Name

Owner Yes School No

SSO Link in Notification? No

Send Confirmation Email? No

Instruction Text

Paragraphs: 0, Characters (with HTML): 0

Confirmation Text

Paragraphs: 0, Characters (with HTML): 0

Cancel Save



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Participants

Add Participant

Name

Faculty

Owner No

School No

Allow Repeat Signatures? No

Allow Return for Revision? No

SSO Link in Notification? Yes

How will this participant be designated?

- The 'Academic Affairs' user will specify the user
- I will specify the user
- The 'Academic Affairs' user will choose from a list I provide
- The 'Academic Affairs' 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
- The participant will be a group designated by API call

Participant Details

First Name

Field_name

Last Name

Email address

Field_email

Customize cosigner email?

Yes

Email Subject

{FORM_NAME}

Automatically insert cosigner link? Yes

Email Body

Rich text editor toolbar with options for Source, Undo, Redo, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Search, and Print. Below the toolbar are dropdown menus for Styles, Format, Font, and Size, along with font color and background color pickers.

Dear {Choice_greeting} {Field_name},

Texas A&M University-Central Texas Academic Affairs Office has completed your {FORM_NAME}. Please Click the link in this email to complete your section.

Paragraphs: 2, Characters (with HTML): 363

Dynamic Email values

Display data/text from your form in the email. Be careful not to use sensitive information!

Form Name

Add to Subject

Add to Body

User-entered form values

Field_name

Add to Subject

Add to Body

Send Confirmation Email? No

Customize Owner Notification Email? No

Cosigner Can End Form? No

Confirmation Text

Rich text editor toolbar with options for Source, Undo, Redo, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Search, and Print. Below the toolbar are dropdown menus for Styles, Format, Font, and Size, along with font color and background color pickers.

Paragraphs: 0, Characters (with HTML): 0/8000

Cancel

Save

Participants

Settings for Field_name ✕

Section

Field Type Mask input?

Minimum Length Maximum Length

Calculated field?

Label Position

Custom CSS classes

Confidential?

Confidential page items will only show to the participants in this list

Custom Validation Text

Tooltip

Tooltip Position

765d1414-546e-47cf-a302-e3ae7d9ba857

TableIntroduction

Name:	<input type="text" value="Field_name"/>
Email:	<input type="text" value="Field_email"/>
Dear	<input type="text" value="-- Please Select --"/>



Participants



Office of the Provost
1001 Leadership Place
Founder's Hall, Suite 429
Killeen, TX 76549

Name:

Email:

Dear ▼

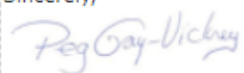
We are offering you an adjunct position.

Texas A&M University-Central Texas is pleased to offer you the position of Adjunct Faculty to teach the following course(s):

Course Name	Course Number and Section	Salary

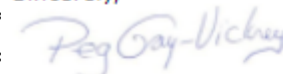
TableNameID

Sincerely,



Provost and Vice President
for Academic and Student Affairs
Professor of Nursing
Distinguished Graduate Faculty

Sincerely,



Provost and Vice President
for Academic and Student Affairs
Professor of Nursing
Distinguished Graduate Faculty

TableAccept

Please select your appointment decision:

Please select your appointment decision:

Your Email:

Your Phone Number:

Settings for Choice_accept ×

Section:

Default entry text: -- Choose --
 -- Please Select --
 (blank)
 Other

Items: *Drag and drop items to reorder*

Value	Description	
I accept this appointment	I accept this appointment	<input type="checkbox"/> <input type="checkbox"/>
I reject this appointment	I reject this appointment	<input type="checkbox"/> <input type="checkbox"/>

Value: Description:

Label Position:

Custom CSS classes:

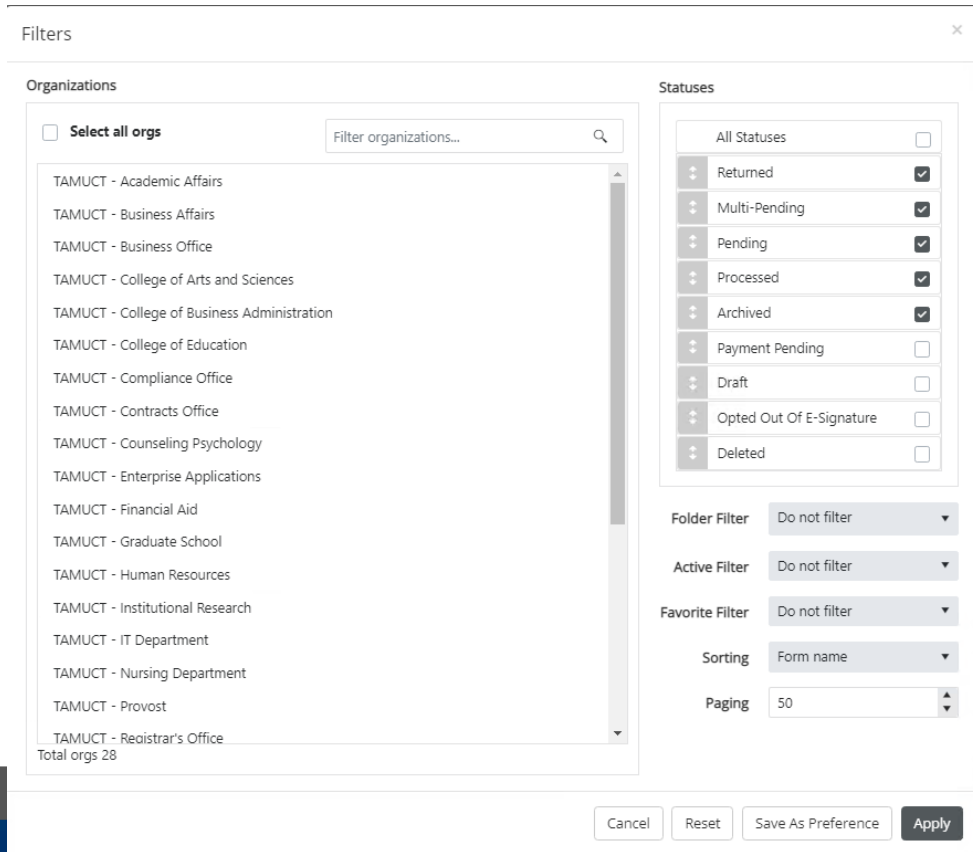
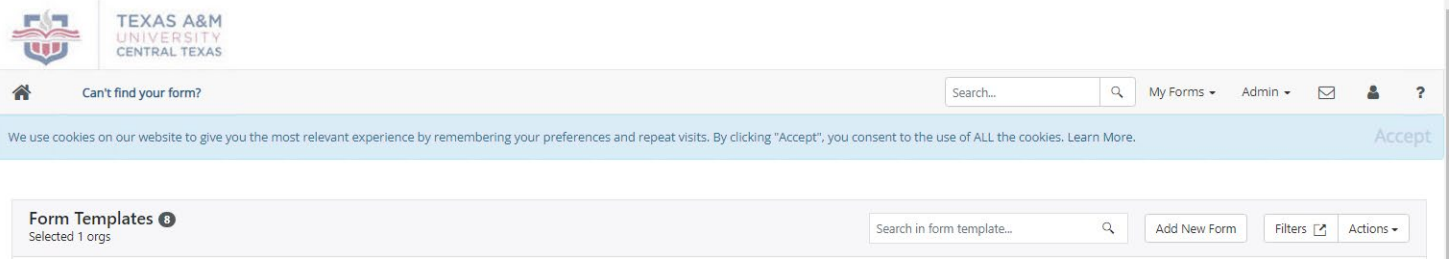
Confidential?:

Confidential page items will only show to the participants in this list



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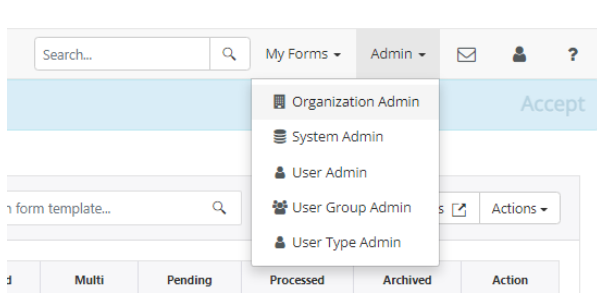
Basic Administration



- ▶ Filters
- ▶ Admin
 - Organization Admin
 - System Admin
 - User Admin
 - User Group Admin
 - User Type Admin



Organization Admin



This screenshot shows the 'Organization Admin' page. It features a search bar, a 'Create new organization' button, and a table of organizations. The table has columns for 'Active', 'Organization Name', 'Sandbox', 'SSO', 'Payment', and 'Action'.

Active	Organization Name	Sandbox	SSO	Payment	Action
Yes	Texas A&M University - Central Texas	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action ▾
Yes	TAMUCT - Academic Affairs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action ▾
Yes	TAMUCT - Business Affairs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action ▾
Yes	TAMUCT - Business Office	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action ▾
Yes	TAMUCT - College of Arts and Sciences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Action ▾
Yes	TAMUCT - College of Business Administration	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action ▾
Yes	TAMUCT - College of Education	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action ▾
Yes	TAMUCT - Compliance Office	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action ▾
Yes	TAMUCT - Contracts Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Action ▾
Yes	TAMUCT - Counseling Psychology	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action ▾
Yes	TAMUCT - Enterprise Applications	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action ▾
Yes	TAMUCT - Financial Aid	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action ▾
Yes	TAMUCT - Graduate School	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action ▾



Organization Admin

Search... My Forms ▾ Admin ▾ Accept

Search in Organizations... Create new organization

Sandbox	SSO	Payment	Action
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action ▾
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Action ▾
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> Edit Organization Deactivate Organization View Audits Delete Organization
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

TAMUCT - Academic Affairs

Details Hierarchy Settings SSO

Name

Display Name

Time Zone

Form History Behavior
 Allow forms to display in user's history

Logout URL
 Users will be redirected to this URL when they log out of Dynamic Forms (if left blank, we will search parent organizations for a value; if no logout URL is found, the user will remain on the Dynamic Forms website)

Reply-To Email Address


Return for Revision Email Address

New Form Email Return URL
 This is the URL that is used in the "New form data has been submitted..." emails


Update Org Details



System Admin



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We use cookies on our website to give you the most relevant experience by remembering your preferences and repeat visits.

System Admin



Forms Migration

Manage forms across your organizations

Organization: TAMUCT - Business Office Select

Forms:

Copy To:

- TAMUCT - Academic Affairs
- TAMUCT - Business Affairs
- TAMUCT - Business Office**
- TAMUCT - College of Arts and Sciences
- TAMUCT - College of Business Administration
- TAMUCT - College of Education
- TAMUCT - Compliance Office
- TAMUCT - Contracts Office

Submit

Organization: TAMUCT - Business Office Select

Forms:

- **LIBRARY** do not delete
- Business Office Financial Responsibility Agreement Active Students
- Business Office Financial Responsibility Agreement Non Active Students
- Business Office Repayment Agreement**
- Business Office Short Term Loan Application
- Business Office Special Repayment Agreement
- Business Office Warrior Guarantee Enrollment Form
- xx_Admissions Academic Fresh Start
- xx_Business Office Special Repayment Agreement Copy

Copy To: TAMUCT - Student Affairs Select

Move the form and its submissions (DON'T make a copy)

Submit



User Admin

A screenshot of the top navigation bar of the User Admin interface. The 'Admin' dropdown menu is open, showing the following options: Organization Admin, System Admin, User Admin, User Group Admin, and User Type Admin. The 'User Admin' option is highlighted. The background shows a search bar and a cookie consent banner.

A screenshot of the 'User Admin' page. The page title is 'User Admin'. Below the title, there is a search bar and a button to 'Add user to your tenant'. A table lists the users, with columns for Active, Username, First Name, Last Name, Email, Manual Account?, Organizations, Groups, and Action. The table contains four rows of user data.

Active	Username	First Name	Last Name	Email	Manual Account?	Organizations	Groups	Action
Yes	businessaffairs	Business	Affairs	businessaffairs@tamuct.edu	Yes	1	0	Action
Yes	academic_affairs	Academic	Affairs	credentialing@tamuct.edu	Yes	2	0	Action
Yes	finaidtamuct	Financial	Aid	finaid@tamuct.edu	Yes	2	0	Action
Yes	EnterpriseApps	Enterprise	Applications	EnterpriseApps@tamuct.edu	Yes	3	0	Action

A screenshot of the 'Action' dropdown menu for a user. The menu is open, showing two options: 'Edit User' and 'View Audits'. The background shows a table with a 'Groups' column containing the value '0'.



User Admin

Manage User

Details

User Name
businessaffairs

First Name
Business

Last Name
Affairs

Email Name
businessaffairs@tamuct.edu

Groups

Name

User Types

Name

Tenant Permissions

Tenant Permission	Permissions
Orgs	0
Users	0

Org Permissions

Organization	Permissions
TAMUCT - Business Affairs	15

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System Requirements
Contact us: support@ngwebsolutions.com

Update Org Permissions

Organizations

Select all

Filter organizations...

- TAMUCT - Business Affairs (15)
- TAMUCT - Academic Affairs
- TAMUCT - Business Office
- TAMUCT - College of Arts and Sciences
- TAMUCT - College of Business Administration
- TAMUCT - College of Education
- TAMUCT - Compliance Office
- TAMUCT - Contracts Office
- TAMUCT - Counseling Psychology
- TAMUCT - Enterprise Applications
- TAMUCT - Financial Aid
- TAMUCT - Graduate School
- TAMUCT - Human Resources
- TAMUCT - Institutional Research
- TAMUCT - IT Department
- TAMUCT - Nursing Department
- TAMUCT - Provost
- TAMUCT - Registrar's Office
- TAMUCT - Sandbox
- TAMUCT - Social Work
- TAMUCT - Staff Council
- TAMUCT - Student Affairs

Total orgs 28

Permissions (You must have View permission to grant Edit permission)

Select all

Expand Collapse

- Orgs
 - View Org information
 - Edit Org information
 - Delete Org
 - Create sub-orgs
- Users
 - Manage users by org
- Form Review
 - View form data
 - Complete school section
- Manage Cosigners
 - View cosigner info
 - Re-send cosigner notifications
 - Edit cosigner info
 - Override cosigner system events
- Change Form Status
 - Process forms

Close Reset Update Permissions



User Admin



System Admin

