Introduction:

This software can be accessed from the myCanisius Portal under the MyApplications section as myElectronicForms or at the following link: DynamicForms.

The Dynamic Forms environment is setup with organizations like folders representing departments. Individuals are granted access to specific folders or organizations based on where they work within Canisius. Should you need administrative access to process forms please contact your ITS support programmer.

To logon to Dynamic forms, click on myElectronicForms in the myCanisiusPortal.

Main Dynamic Forms Portal Screen

If you are an administrator you will see a list of all the forms and folders you have access to. Clicking on Canisius College Portal will take you to the screen that non-administrators get to.
If you are not an administrator, you will see the following screen:

There are 3 sections to this screen.
1) Forms assigned to you to complete is located in the upper left corner. If you have specifically been assigned a form to complete, you will see that here.

2) The Pending Action section in the lower left corner lists any forms that are pending for you to complete. Click on actions to complete the form.

3) The "Other Forms" section in the upper right corner of the screen is where new forms that anyone can fill out when needed will reside. For example, if you need to fill out a vendor request form, you will find that form in the pulldown section here.

**Setting a default organization folder:**

If you have access to multiple organization folders, you may select a default by clicking on the person silhouette icon in the upper right corner of your screen.

Choose update profile.
Click in the Default Organization. A drop down list appears for you to select from all organizations you have access to.

Click Update Default Organization. Now, every time you logon, that organization will be your default.

*Note, this is not a requirement. All forms you have access to will be displayed. However, if that list is too long to manage, you can utilize this functionality to limit the list.

**The Main Administration Screen:**
Administering work queues

Clicking into one of the queues such as Multi, Pending, Processed or Archive, the user will be presented with a listing of individual forms submitted (form instances). The default order of these forms is based on the date that the form was submitted. You can reorganize the order of these forms by clicking on the column headings or setting your preferences for the queue area.

Each form submission (instance) will show as one line in the queue. On that line, the user will be able to see the PDF of the form captured the HTML view of the form captured, the audit of the form instance and all of the data collected about the form including the IP address of user who submitted the form.
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**Queue Definitions:**

<table>
<thead>
<tr>
<th>Queue Definition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Returned</td>
<td>A form that has been returned to a participant for revisions. This form will remain in the 'Returned' queue until the participant re-submits the form, or returns it to someone else.</td>
</tr>
<tr>
<td>Multi</td>
<td>Forms that are still expecting a signature from at least 1 participant will be in this queue.</td>
</tr>
<tr>
<td>Pending</td>
<td>Forms that have gathered all signatures are within this queue. An administrator can select &quot;Mark Processed&quot; to move forms from this queue to the processed queue.</td>
</tr>
<tr>
<td>Processed</td>
<td>This queue contains forms that an administrator has &quot;Marked Processed,&quot; or signed as a &quot;School Section&quot; participant. Administrators typically use this queue to indicate a form is complete, and reviewed.</td>
</tr>
<tr>
<td>Archived</td>
<td>This is another queue available for administrators to place older completed / reviewed forms.</td>
</tr>
<tr>
<td>Payment Pending</td>
<td>Payment forms that have not had the payment portion completed, or are currently waiting for a payment confirmation from the 3rd-party vendor will remain here.</td>
</tr>
<tr>
<td>Draft</td>
<td>Forms with the &quot;Allow Drafts to be Saved&quot; setting turned on will allow users to save their progress and return to their pending / draft area to complete the form. The form will remain in this queue until they do.</td>
</tr>
<tr>
<td>Opted Out</td>
<td>When a user is signing a form, they have to have the option to &quot;Opt-Out.&quot; By Opting-Out, the user is declining to sign the form or acknowledge the data within the form. The form will then move to this queue, and be null. Forms cannot be moved from this queue, and the form will need to be restarted.</td>
</tr>
<tr>
<td>Deleted</td>
<td>Form submission that are deleted by administrators can be found within this queue.</td>
</tr>
</tbody>
</table>

**Search feature**

The search feature gives you the ability to search on a form owner name or data collected from fields on the form such as student ID, email address, etc. This option will search all statuses of the form template.

**Setting your preferences**
A video explaining the new preference function under version 10 of dynamic forms can be found here: https://vimeo.com/671375428/b43bdd852e

Change of Address and/or Emergency Contact Info

Just as you are able to set your preferred view in the organization, you are also able to set your preferred view in the queue by form. Your set preference will be saved for the next time you go into the queue of the form template. The Preference button allows you to set the following:

- **Fields** - you may choose the fields/columns you would like to see in the queue. This can be system fields (i.e. signature dates) or fields from the form. **Please note you can only select up to 20 form items to be viewed in the queue. If you need access to more data, you may export the queue data to excel by clicking the Export button next to the Preference button.

- **Sorting** - you may select which column you would like to sort on.

- **Paging** - you may select how many items/submissions you would like to see per page.

Administrative actions in the queue

As an administrator, you have the option to review and take action on form submissions. For example, if you are in the Pending queue and you would like to move forms from pending to processed you may do so by using the Actions menu next to a submission or checking the box next to the submission and clicking the Selected Actions drop down in the upper right corner.
Auto archiving of form submissions

You have the option to auto archive forms if you choose not to manually move them. You can select your desired preferences on which forms are to be archived. Once set the site will automatically archive the forms based on your preferences at 10pm EST. You may still access these archived forms by clicking on the Archive tab in the queue. If the Dynamic Forms Exchange (DFE) software is automatically archiving for you when exporting the data, do not archive them manually. That will prevent the DFE from picking up the form for export.

Auto Archive Old Forms

You are changing your setting for all forms in the current organization.

<table>
<thead>
<tr>
<th>Status</th>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rejected</td>
<td>Do not auto archive</td>
</tr>
<tr>
<td>Multi Pending</td>
<td>Do not auto archive</td>
</tr>
<tr>
<td>Payment Pending</td>
<td>Do not auto archive</td>
</tr>
<tr>
<td>Pending</td>
<td>Do not auto archive</td>
</tr>
<tr>
<td>Opt Out</td>
<td>Do not auto archive</td>
</tr>
<tr>
<td>Processed</td>
<td>Archive forms older than 60 days</td>
</tr>
</tbody>
</table>
Return for revision as an administrator

A form administrator can return a form for revision from within the PDF view of a submitted form within a work queue.

After launching the PDF view, the form administrator accesses the action drop down menu from the upper right corner. To return the form, select Return for Revision.

The form administrator is now able to create a custom email for the selected form participant. This action allows the form administrator to choose any form participant aligned to the form, provide customized instructions for revision, and choose to include a direct link to the form within the email.
Revising routing of an in-progress form:

In this scenario, what you can do is for the forms that are in progress, you can go into the Multi-Pending queue, click Action.
Manage Co-signers.

From there, you can update the co-signer information and click Re-send email to send a new email to the updated Co-signer.

You can edit the co-signer and/or re-send an email from here.
Form Invitations

Some forms require an invitation to complete. HR Appraisals are a good example of that. In this situation a csv file containing pertinent information is uploaded and invitations are emailed to individuals identified in that file to complete the form. The email contains a link to the form. Some level of personalization is completed in this process. In the example of the HR Appraisal, the csv file contains the employee data and the supervisor data so that the appraisal routing can be completed.

What are invitations?

Invitations are a way to invite users to complete forms. Administrators can manually create an invitation to invite users (via email) to complete forms. For example, if the college had 50 faculty members who were required to sign a confidentiality form, Administrators will be able to upload a file of those 50 faculty members, along with any information they would like to prefill into the form template and then email invitations to those 50 faculty members to complete their respective form. Faculty members would be able to click into the invitation (sign in if necessary) and then complete the form which might include some prefilled data for them. Administrators will be able to track the uploaded 50 faculty members, see which faculty members started the form and which might need an additional push.

You can view which forms have had invitations to sent to be completed by viewing the Invites column in the organization.
Invitations via File Upload

Administrators have an option from the Admin menu from the organization called Upload Files. This will allow administrators to initiate sending a group of people an invitation to complete a form.
After selecting the option to upload a new file, the Administrator will be taken through a Wizard where they are able to select the form template, select the file to be used and then select the fields to be mapped to enable prefilling the form template. You will be taken through 6 steps. You can click Next to move onto the next step. You are also able to click Previous if you need to go back to a previous step.

We would recommend you send a test invite to yourself or to a colleague prior to sending to a large group of users.

Step 1: Choose your form

- Pick the form from your organization that you would like to invite users to complete and click Next.

Step 2: Choose your file

- The file must be a CSV file. You may prep your file in Excel then save as a csv file.
  - It will give you a preview of the file that you have chosen.
A standard windows search screen is displayed and you navigate to where the .csv file is located.

Once a file is selected the preview pane will show the file data.

Click Next.

**Step 3: Map User Fields**

- You will next map the fields that will identify who will be invited to complete the form.
  - First Name, Last Name, Email are required fields that must be mapped.
Click Next.

**Step 4: Map Prefill Fields**

- You may map the fields that you would like prefilled on the form from data in your file.
  - You will pick the Form Field first then pick the File Column and click Add.

Click Next
Step 5: Customize Email

- You may customize the email that will be sent to your users.
- You may use tokens to insert dynamic values into the body of the email.
  - Make sure to include the Invitation URL as this is needed for the user to complete the form.
  - If your institution uses SSO, you will need to add your SSO prefix in front of the Invitation URL. Make sure there are no spaces between the prefix and Invitation URL.

Click Next
**Step 6: Upload**

- Next choose when to send the invitation.
  - Send the invitation immediately upon clicking 'Upload File' button
  - Pick a date and time to have the invitation sent.
- If you are sending an invitation for the same form to new users, but would also like to resend the existing invitations for the same form, you can check the box to re-send existing invitations.
- Once you have clicked Upload File you will receive a confirmation message that the invitation is complete.

**Form Invitations Dashboard**

Administrators are able to see and manage Invitations on the Form Invitations Dashboard. This page will enable them to track which invitations have been sent for which form templates, as well as see the total number of end users who have forms started and see how many might need an additional push.

You can access the Form Invitations Dashboard either by clicking on a form that you have sent an invitation for within the organization or by going to the Admin menu and selecting Form Invitations.
Manage Invitations

Administrators will be able to look at individual invitations and will be able to see the list of users who received the invitation by clicking the Actions menu next to the form and selecting Manage Invitations.

Administrators may view the list of users who received and invitation for the specific form. You will be able to see the following:

- First Name
- Last Name
- Email
- Status (if the form has been started or not)
- Last Email Sent

The Action menu will give you the option to Resend the invitation if the form has not been started or Delete the Invitation.

Create New Invitation

Administrators can create new invitations for the form you have selected to manage or from the Form Invitation Dashboard.

You can click the Create New Invitation button to send an invitation to a new user or overwrite an existing invite for a user by checking the Overwrite Existing Invitation box.
Administrators can also create a new form invitation from the Form Invitations Dashboard by clicking the Create New Invitation button. Then you would choose the form where you would like to send an invitation.

**Auto-Delete Invitations**

Administrators will also be given an option to set up an auto-delete frequency for invitations. You will click the Set Auto-Delete Frequency button, then you will choose the frequency you would like the invitations deleted then click Save.
Manage Custom Email

Administrators are able to edit or manage the custom email that you have created for an invitation. This will allow you to make changes to it if you would like to resend the invite or send to new users. You would click the Action menu next to the form and select Manage Custom Email. You may edit/customize the email and as a reminder you want to make sure you include the token for the Invitation URL.
Locating any pending forms

If you are a portal administrator, from the Main Administration Screen, Click on My Forms, then select Canisius College Portal.

This will take you to the same screen all non-administrators see.

A list of all pending forms is displayed in the Pending Action section.
You can view the form in PDF or HTML, or Complete the form.

When completing a form, if the form needs a signature, the form will open and prompt for that.
Assigning a form to a user

***Please contact ITS for assistance with this functionality.

**Frequently Asked Questions**

Can the opt-out line be removed from a signature block?

Unfortunately, this cannot be removed in case the student is not able to provide an e-signature and would like to opt out, print, and provide a “wet” signature instead.