Getting Started with Dynamic Forms:
How to build your first form
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Support Contact: Daniel VanZant (vanzantd@etsu.edu; 439-8613)
Log in

To login to Dynamic Forms use our ITS created login page and sign in with your ETSU Username and Password.

https://etsupws.etsu.edu/DynamicForms

Welcome to Dynamic Forms

Welcome to Dynamic Forms

Let's get started, Aaron. The Bucky's Food Pantry - Returning form needs to be completed. To do this, please click Complete This Form. You can check back here anytime to view your Pending / Draft Forms and review your completed Forms History.

Thank you for using Dynamic Forms!

The User Interface

Dashboard

All your forms are displayed with the following options:
Edit Form Basic Items – Users can update basic items such as form name

Edit Page Items – Users can edit all the form controls

Activate/Deactivate – Allows users to take forms offline

Form Copy - Users can copy any existing form

Fill out form – Users can view the form or fill it out should they choose.

Multiple Signature / Pending/ Processed / Archived – Shows users how many forms are at each stage of the process. The numbers in each column link users to a list of all submissions in each stage.

URL Button - Users can click this button to view the url for a particular form

Delete Form – Allows users to delete forms

Add a New Form – Users can start a new form.

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Setting Up a New Form

Form Name/Type Tab

<table>
<thead>
<tr>
<th>Name</th>
<th>Training - 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>This form is created for training purposes.</td>
</tr>
<tr>
<td>Esign Requirements</td>
<td>None</td>
</tr>
<tr>
<td>Show the form timer?</td>
<td>Yes</td>
</tr>
<tr>
<td>Use Recaptcha Validation?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Name

Description

Esign Requirements

None – Will not require a user to login to fill out and submit the form.

Single – Signature - Forces users to login to Dynamic Forms and sign the form electronically before submitting it.

Multi-Signature – Allows users to apply a multi-signature workflow to a form. (This topic will be covered in our Advanced Designer – Dynamic Forms training.)

Show the form timer?

A logout timer set to 45min. displays on Dynamic Forms by default. Once a user has been inactive for 45min they will be logged out of Dynamic Forms. We recommend leaving this set to “yes”.

Use Recaptcha Validation?

Forces submitters to enter a security code before submitting. Please leave this set to “yes” if your form does not require a login to complete. This will prevent robots from filling out your form.
Admin Notification Tab

Allows users to set up custom emails to be sent to the form owner either at set intervals or each time a form has been submitted. Use

![Admin Notification Tab Image]

Single Sign On

Allows users to set up custom SSO messages for submitters who did not login successfully. At the bottom of this tab is an option to set the owner notification emails to include SSO links to the forms. *Change this to “yes” for any forms that will be only internal to ETSU.*

![Single Sign On Tab Image]

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**Inactive Text**

This text displays when a user has been timed out of your form.

**Confirmation Text**

This text will display when the submitter submits your form successfully.

**Rules/Conditions**

Rules/Conditions will be covered in our *Advanced Designer – Dynamic Forms*

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**Building Your Form**

[Image of a form editor interface]

**Add New Item**  – Users can create new items

[Image of add new item options]

This button allows you to create a new form item for your form. You can add items such as Tables, Long Answers, Short Answers, Check Boxes, Choice Lists, Images, Text & HTML, and Master Items.

Or,

This button allows you to copy an existing item from this or any other form. Copying an existing form item can save time if you want to add a similar item.
Add New Form Item

After clicking on Add a New Form Item you are presented with the following options:

Table

Tables can be added to the form for greater formatting flexibility. You have full control over the number of rows and columns in a table.

Long Answer

This provides an area where a user can type in a block of information. A text area field displays as:

The text area allows the user to input a lot of textual information

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Short Answer

These are used to display text and to accept text entry from users. A text box displays as:

Last Name: Smith
Choice List

These are used to display a list of specific options that a user can select from when completing an online form. A drop-down list displays as:
Add New Choice List (See Page Help)

Enter field label, if needed:

Choice List Label

Add items to your list:

<table>
<thead>
<tr>
<th>Value (What gets saved)</th>
<th>Description (What the user sees)</th>
<th>Delete</th>
</tr>
</thead>
</table>

Click here to add a new choice.

Field Preview
Choice List Label: -- Please Select --

Add New Choice List (See Page Help)

Add items to your list:

<table>
<thead>
<tr>
<th>Value (What gets saved)</th>
<th>Description (What the user sees)</th>
<th>Save</th>
<th>Cancel</th>
</tr>
</thead>
</table>

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## Add New Choice List

**Value** (What gets saved) | **Description** (What the user sees) | **Delete**
---|---|---
R | Red | [X]
G | Green | [X]
E | Blue | [X]

**Add items to your list:**

**Enter field label, if needed:**

**Choice List Label**

**Add items to your list:**

<table>
<thead>
<tr>
<th>Change</th>
<th>Value</th>
<th>Description</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>⬗ R</td>
<td>R</td>
<td>Red</td>
<td>[X]</td>
</tr>
<tr>
<td>⬗ G</td>
<td>G</td>
<td>Green</td>
<td>[X]</td>
</tr>
<tr>
<td>⬗ E</td>
<td>E</td>
<td>Blue</td>
<td>[X]</td>
</tr>
</tbody>
</table>

**Field Preview**

**Choice List Label**

- Please Select
- Red
- Green
- Blue
Check Box

This is an element that can be turned on or off using a mouse click. Note: You cannot make a check box field required on a form. A check box displays as:

![Check Box](image)

Text and HTML

This is used to display written instructions or information to the student/parent who will complete the online form

![Text and HTML](image)

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Image

This is used to add images/logos to a form.

Master Items

This allows you to select from Master Items such as State drop down list. There is a currently a somewhat short list of items which have not been modified for our school. *We recommend that you do not use these currently.*

File Upload Items

This allows you to add field so users can attach files to a form.
**Save your form Item**

Once you have chosen an item and entered in the options specific to that item, the following page asks you to name your item. This page also contains a drop down menu with listing Existing form item names for your department. Finally, there is a require this item box.

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Copy an Existing Form Item

This option lets users copy form items already created in other forms within the department. Once you choose this option you will first be asked to select the form containing the form item you wish to copy.
You will then be asked to choose the existing item from a drop down list.

Once you have selected an existing item from the field name list you will be given the opportunity to make modifications to that item. If you do make changes you will need to rename that item with a unique name before saving.

**Rearranging Form Items**

Click on the Re-Order Items button. You will then see the item list appear on the left hand of your screen as shown below.
Simply drag the item you wish to move up or down the list to the position you want.

**Preview Form in Progress**

[Preview Form as PDF] [Preview Form in Browser]

To preview your form while you are building it click either the **Preview form as PDF** or the **Preview Form in Browser** button located above the Form Designer window.

Once you are happy with your form, click the home button to return to your department folder.
Publishing Your Form

To publish your form you must first click the Activate the Form button next to your form in the dashboard.

Next you will click the URL button to the right of your form name in the dashboard. This will open up a window containing your url.

If this form is not internal you can copy and paste this form url into a hyperlink where you would like this form to be accessed from, or send it to the web team to be added as an iframe into a page on your website.

If this form is internal you will need to add the following url sting to the beginning of the url generated by dynamic forms before sharing or posting this link to your website.

https://etsupws.etsu.edu/DynamicForms?targetURL=

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## Accessing Form Responses

Once your form has a submission you can access the submissions from the dashboard by clicking on the numbers in the appropriate column to the right of your form name.

![Table of submission entries]

From this menu you can scroll through all submission entries in a table view.

You can also view a PDF or HTML version of each completed form by clicking on the corresponding icon to the left of the submission you would like to view.

![PDF and HTML icons]

You can also export all form submissions to an Excel file by clicking on the Export to Excel button located on the top right corner of the submissions table.