

Information Technology Services



Getting Started with Dynamic Forms:

How to build your first form

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Contents

Log in	3
Welcome to Dynamic Forms	3
The User Interface	3
Dashboard.....	3
Setting Up a New Form	4
Form Name/Type Page	4
Admin Notification Page	5
Single Sign On (SSO)	6
Custom Text	6
Rules/Conditions.....	7
Building Your Form	7
Add New Form Item	7
Table.....	8
Long Answer.....	8
Long Answer – Advanced Options.....	8
Short Answer.....	8
Short Answer – Advanced Options.....	9
Choice List	9
Check Box.....	11
Text and HTML	11
Image.....	12
Master Item.....	12
File Upload	12
Save Your Form Item	12
Rearranging Form Items.....	13
Preview Form in Progress.....	13
Publishing Your Form	13
Accessing Form Responses.....	15

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

The User Interface

Dashboard

All forms display the following options under Actions:

- **Edit Form Template** – Users can update basic items such as form name
- **Activate / Deactivate** – Allow users to take forms offline
- **Copy Form Template** – Users can copy any existing form
- **URL Instructions** – Provides users embedding URL
- **Delete Form Template** – Deletes form from org unit
- **Fill out Form** – Users can view the form or fill out should they choose

***Note:** When a form is active and has submissions (**Reject / Multi / Pending / Processed / Archived**) the 'Edit Form Template' option is not available. To continue editing a form you will need to clear out all forms before the option to edit will be available or copy the form to update and make the updated form active. Make sure that you deactivate the original.

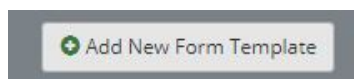
Multiple / Pending / Processed / Archived

Reject	Multi	Pending	Processed	Archived
0	1	0	0	0
0	0	0	0	0

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Shows Form Administrators 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

Add New From Template – Users can start a new form



Setting Up a New Form

Form Name/Type Page

A screenshot of a web application interface for setting up a new form. On the left is a sidebar with a 'Name / Type' menu containing 'Admin Notification', 'Payments', 'Custom Text', 'SSO', and 'Events'. Below the menu is a 'Pages' section with a green plus icon and an orange 'Start Designing' button. At the bottom left, it says 'Last updated: Stephen Fields Oct 9, 2017, 12:45:02 PM'. The main area has a 'Name' field with 'Training - 1', a 'Description' field with 'This form is being created for training purposes', and an 'Esign Requirements' dropdown set to 'None'. Below these are four toggle switches: 'Send confirmation email?' (No), 'Show form timer?' (Yes), 'Use Recaptcha validation?' (No), and 'Use Automatic Activation?' (No).

Name – Name of the form – this can be part of the subject line in emails

Description – for your information only

Esign Requirements

- **None** – Will **not** require a Form Submitter to login to fill out and submit the form.
- **Single-Signature** – Forces Form Submitter to login to Dynamic Forms and sign the form electronically before submitting.

Multi-Signature – Allows Form Administer to apply a multi-signature work flow 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 Form Submitter has been inactive for 45 minutes, they will be logged out of Dynamic Forms. *We recommend leaving this set to*

“yes”.

Use Recaptcha Validation?

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

Admin Notification Page

Allows Form Administer to set up custom emails to be sent to self or other form administrators at set intervals or each time a form has been submitted.

The screenshot shows the 'Admin Notification' page. On the left is a sidebar menu with options: 'Name / Type', 'Admin Notification' (selected), 'Payments', 'Custom Text', 'SSO', and 'Events'. Below the menu are buttons for 'Pages' (with a green plus icon) and 'Start Designing' (orange). The main content area has a 'Notification Frequency' dropdown menu. Below it is a 'Notification email recipient(s)' field with a note: 'Note: Separate email addresses with a semicolon (;)'. Underneath is a text input field labeled 'Email addresses'. At the bottom of the main area is a 'Use custom email?' toggle switch, currently set to 'No'. At the very bottom of the page, small text reads: 'Last updated: Stephen Fields Oct 9, 2017, 12:45:02 PM'.

Custom Text

Inactive Text

- This text displays when a Form Submitter has been timed out of your form.

Confirmation Text

- This text will display when the Form Submitter submits your form successfully.

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Single Sign On (SSO)

Allows Form Administer 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 (Form Submitter) notification emails to include SSO links to the forms. ***Change this to “yes” for any forms that are only internal to ETSU.***

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Building Your Form

This screenshot shows the 'Add Item' toolbar from the form designer. It features a tabbed interface with 'Add Item' selected. Below the tabs is a grid of 11 form item icons: Table, Short Answer, Long Answer, Date Picker, Choice List, Check Box, Text & HTML, Image, File Upload, Radio Buttons, and Existing Item. A message at the bottom reads: 'Drag items from the toolbar above to add them to your page'.

Once a Form Administer creates a new form, the form's configuration page will open. The forms configuration page includes the form designer.

This screenshot shows the form configuration page for East Tennessee State University. The top navigation bar includes a home icon, a dropdown menu for 'East Tennessee State University', a 'Go' button, and links for 'My Forms', 'Admin', a user icon, and a help icon. On the left sidebar, there are sections for 'Name / Type' (Admin Notification, Payments, Custom Text, SSO, Events), 'Pages' (Page 1), and buttons for 'Preview in Browser' and 'Preview as PDF'. The main area displays the 'Add Item' toolbar and a form preview. The preview shows a 'TableHeader' with the East Tennessee State University logo and name, and a 'Table1' with three rows: 'Full Name' with a text input 'txtFullName', 'Email Address' with a text input 'txtEmailAddress', and 'Available Roles' with a dropdown menu 'Please Select'.

Add New Form Item

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

This screenshot shows the 'Add Item' toolbar, which is identical to the one in the first image. It contains 11 form item icons: Table, Short Answer, Long Answer, Date Picker, Choice List, Check Box, Text & HTML, Image, File Upload, Radio Buttons, and Existing Item.

Selected an Add Item and drag it to your form, you will see these options to the right of the edit item tab.



Advanced

The advanced button gives you different options to modify the Add Item that you had selected.

Rules/Conditions

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

Save

Save button saves your selections.

Delete

Delete button removes the Add Item.

Add Items

Table

Tables are 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



Settings for TextBox1

×

Field Type

Generic Answer

☐ Mask input?

Minimum Length

Maximum Length

ed6ff075-0cae-42c6-b2c4-59535a7ca472

Cancel

Save

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:

Settings for DropDownList1

×

Default entry text

☐ -- Please Select --

☐ -- Choose --

☒ (blank)

☐ Other

Items

Manual

API

Value

Description

Value

Description

+

Include in library?

No

Active?

No

ba00afca-6e39-47d4-b690-e7d2511f6cdb

Cancel

Save

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Settings for DropDownList1



- Default entry text
- ☒ -- Please Select --
 - ☐ -- Choose --
 - ☐ (blank)
 - ☐ Other

Items

Manual

API

Drag and drop items to reorder

Value	Description	
R	Red	 
G	Green	 
Y	Yellow	 
<input type="text" value="b"/>	<input type="text" value="Blue"/>	

Include in library?

Active?

ba00afca-6e39-47d4-b690-e7d2511f6cdb

Cancel

Save

Check Box

This element can be turned on or off using a mouse click. A check box displays as:

☒ Check Box

Add Item
Add Item Template
Edit Item
Styles

Name
☐ Required?

Label
☐ Hide label?

Add some content using the "Text" field above.

☐

Text and HTML

This item is used to display written instructions or information to the user who will complete the online form

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Label for LiteralText1

×

Cancel

Save









Image

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

Settings for Image1

×

Select from Image Library

Image	File Name	Size	
	uschool_letterhead.jpg <i>Uploaded 2016-03-03T14:01:41.42</i>	598x242	Select
	uschool_letterhead_375.png <i>Uploaded 2016-03-03T15:15:26.717</i>	375x152	Select
	joinusgraphic.png <i>Uploaded 2016-03-16T12:05:04.957</i>	668x467	Select
	joinusgraphic_1.png <i>Uploaded 2016-03-16T12:07:25.397</i>	485x467	Select
	tablesofcontent_instructions.png <i>Uploaded 2016-03-16T12:12:49.08</i>	666x451	Select
	tablesofcontent_instructions_b.png <i>Uploaded 2016-03-17T10:50:43.99</i>	685x573	Select
	tablesofcontent_instructions_c.png <i>Uploaded 2016-03-17T11:00:01.473</i>	600x502	Select
	tablesofcontent_instructions_d.png <i>Uploaded 2016-03-17T14:55:47.843</i>	678x594	Select

File Upload

This allows you to add field so users can attach files to a form.

Choose File No file chosen

Files over 25 Mb will not be accepted

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Rearranging Form Items

To rearrange form items, make sure that you are on the form designer view, click on the item that you would like moved and drag it to the new position on the form.

Preview Form in Progress



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

Once you are satisfied 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 in the action panel on the right side of the form in the dashboard



Next you will click the URL button in the action panel on the right side of the form in the dashboard. This will open up a window containing your URL.

URL Instructions

×

This screen shows the URL options (web links) which you or your IT personnel will need to post to your website in order for someone to access and complete this form from the internet.

Form Template:
2014-2015 Verification Worksheet - Standard Verification - Dependent Students

For Non-Single Sign On Forms:
<https://dynamicforms.ngwebsolutions.com/Submit/Start/8d27a9ff-9b7b-42f3-bd5b-f5fc9859417f?SSO=N>

For Single Sign On Forms:
<https://webapps.etsu.edu/DynamicForms?targetURL=https%3a%2f%2fdynamicforms.ngwebsolutions.com%2fSubmit%2fStart%2f8d27a9ff-9b7b-42f3-bd5b-f5fc9859417f>

Close


If this form is *not* internal, use the ‘For Non-Single Sign On Forms’ link.
(first link)

If this form *is* internal use the ‘For Single Sign On Forms’ link (second link)

Accessing Form Responses

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

Reject	Multi	Pending	Processed	Archived
0	0	0	0	0
1	9	44	0	0


EAST TENNESSEE STATE UNIVERSITY

ETSU - Training

Go

My Forms

Admin

?







test form - Multi-signature forms

(Pending | Processed | Archived)

Results - The forms below are pending one or more signatures.

Export to Excel

1

PDF	HTML	Action	Submit Date	Sign Date	Signed By	Co-Signers	short_advisorname	short_studentname	testtest	Advisor verified	Chair verified	Student IP address	Advisor IP address	Chair IP address
		Pending Signature(s)	5/9/2017 10:03:58 AM	5/9/2017 10:03:58 AM	Daniel Vanzant			Daniel Vanzant		False		151.141.188.13		
		Pending Signature(s)	2/22/2017 3:56:55 PM	2/22/2017 3:56:55 PM	Daniel Vanzant			Daniel Vanzant		False		151.141.113.21		

1

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

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 from by clicking on the corresponding icon to the left of the submission you would like to view.

PDF	HTML
	

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.

Congratulations!

You have just built your first Dynamic Form.

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