Getting Started with Dynamic Forms:
How to build your first form
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.

<table>
<thead>
<tr>
<th></th>
<th>Reject</th>
<th>Multi</th>
<th>Pending</th>
<th>Processed</th>
<th>Archived</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Support Contact: Sherry Martinez (martines@etsu.edu; 439-8249)
Shows Form Administers 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 Form Template** – Users can start a new form

---

**Setting Up a New Form**

**Form Name/Type Page**

<table>
<thead>
<tr>
<th>Name/Type</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Notification</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Custom Text</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SSO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Events</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Pages**

**Start Designing**

Last updated: Stephen Fields Oct 8, 2013 12:45:02 PM

- **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 submitters 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 administers at set intervals or each time a form has been submitted.

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.
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.
Building Your Form

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

Add New Form Item

After clicking on Add Item you are presented with the following options:
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
Long Answer – Advanced Options

Settings for TextArea1

- Maximum Length
- Prefill from API?

Short Answer

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

Last Name: Smith

Short Answer – Advanced Options
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:

![Drop-down list example]

**Settings for DropDownList1**

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

- **Items:**
  - Manual
  - API

- **Value**
  - Description

- **Include in library:** No
- **Active:** No
Check Box
This element can be turned on or off using a mouse click. A check box displays as:

![Check Box]

Text and HTML
This item is used to display written instructions or information to the user who will complete the online form.
Image
This is used to add images/logos to a form.

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

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.

Support Contact: Sherry Martinez (martines@etsu.edu; 439-8249)