

# Information Technology Services

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## **Getting Started with Dynamic Forms:**

*How to build your first form*

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# 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 of forms display with the following options:

- **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.

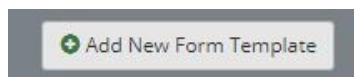
Multiple / Pending / Processed / Archived Signatures - Shows Form Administrators

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

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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 creating a new form. On the left is a sidebar with a list of form types: Admin Notification, Payments, Custom Text, SSO, and Events. Below this 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 "Esign Requirements" set to "None". There 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 it.
- **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*

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“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 Administrator to set up custom emails to be sent to self or other form administrators either at set intervals or each time a form has been submitted.

The screenshot shows a web interface for configuring admin notifications. On the left is a vertical menu with options: Name / Type, Admin Notification (selected), Payments, Custom Text, SSO, and Events. Below the menu are 'Pages' and a '+ Start Designing' button. The main area contains a 'Notification Frequency' dropdown menu, a 'Notification email recipient(s)' field with a note 'Note: Separate email addresses with a semicolon (;)', and a 'Use custom email?' checkbox with a 'No' button.

Last updated:  
Stephen Fields Oct 9, 2017,  
12:45:02 PM

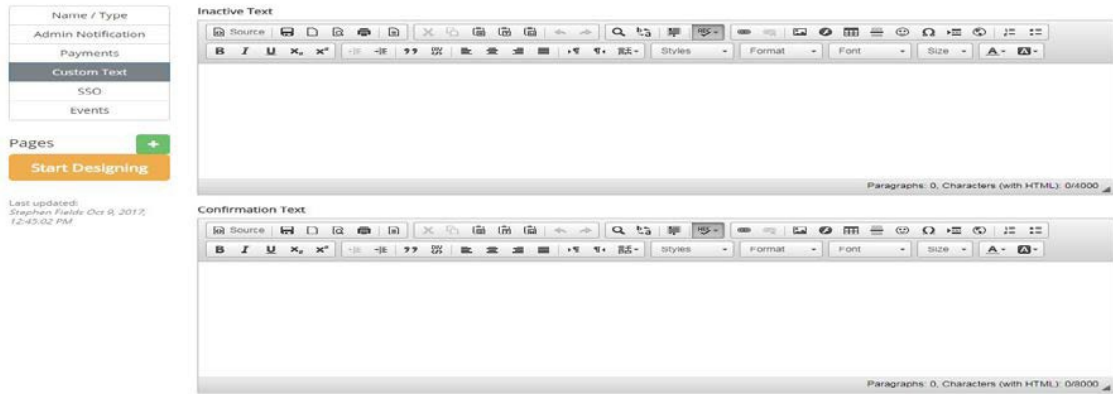
## Custom Text

### Inactive Text

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

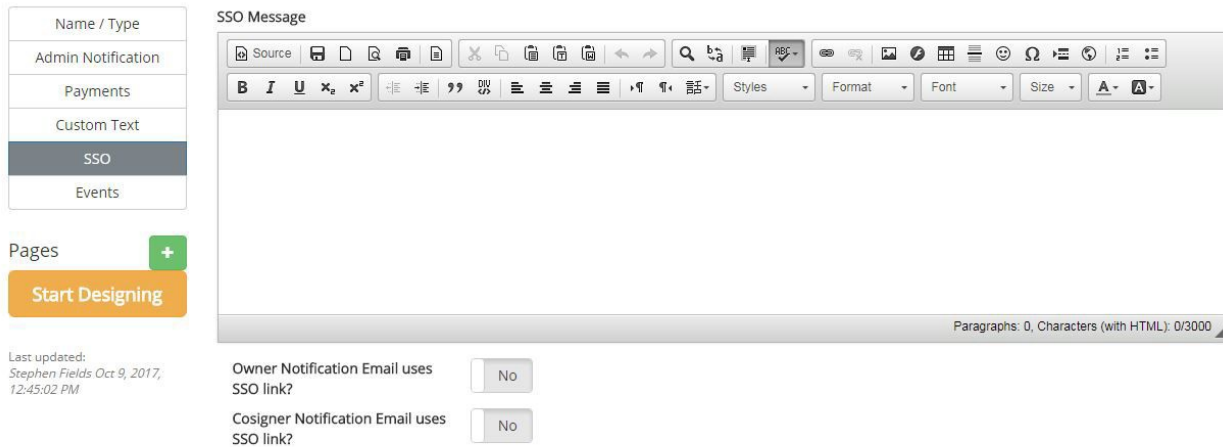
### Confirmation Text

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



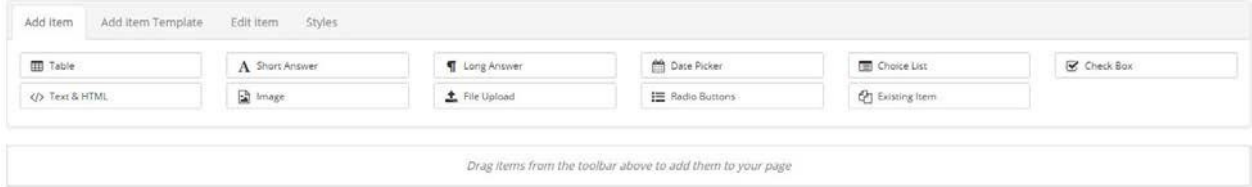
## Single Sign On (SSO)

Allows Form Administrator 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 will be only internal to ETSU.***

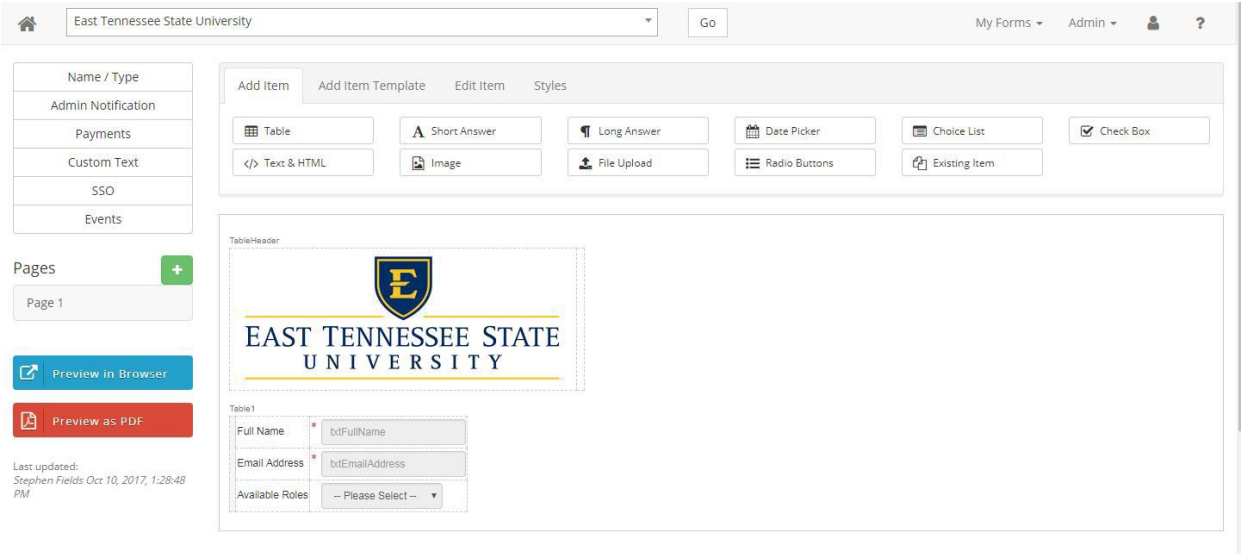


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# Building Your Form

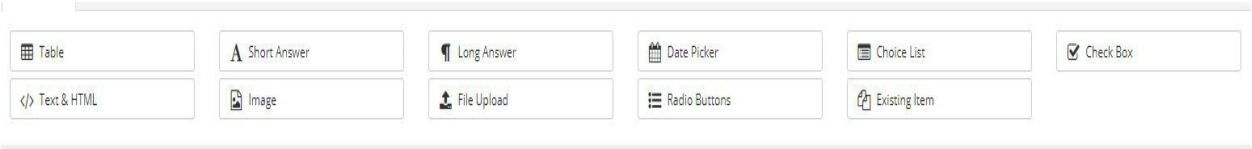


Once a Form Administer creates a new form, they will be taken to the form’s configuration page. The forms configuration page includes the form designer.



## Add New Form Item

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



Once you have 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– DynamicForms* training.

### Save

Save button saves your selections.

### Delete

Delete button removes the Add Item.

### Add Items

### 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

A simple rectangular text area field with a thin border, intended for user input.



Add Item   Add Item Template   **Edit Item**   Styles

Name    Width     Required?

Label    Height     Hide label?

*Add some content using the "Text" field above.*

TextArea1

## Long Answer – Advanced Options

Settings for TextArea1 ×

Maximum Length     Prefill from API?

0f93fdc5-2e95-40b1-a851-e6dcddb9c541

## Short Answer

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

Last Name:

Add Item   Add Item Template   **Edit Item**   Styles

Name    Width     Required?

Label     Hide label?

*Add some content using the "Text" field above.*

TextBox1

## Short Answer – Advanced Options

## Settings for TextBox1

✕

Field Type   Mask input?

Minimum Length  Maximum Length

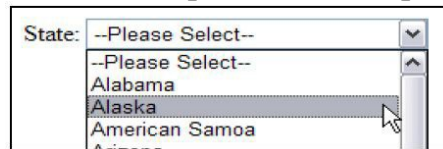
ed6ff075-0cae-42c6-b2c4-59535a7ca472

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	
<input type="text" value="Value"/>	<input type="text" value="Description"/>	<input type="button" value="+"/>

Include in library?  No

Active?  No

ba00afca-6e39-47d4-b690-e7d2511f6cdb

Cancel

Save

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?  No

Active?  No

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

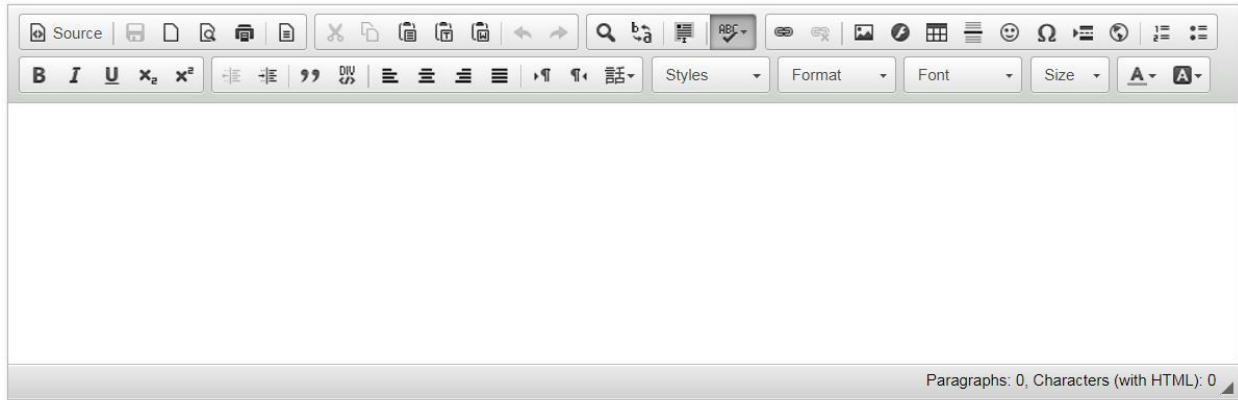
Add Item	Add Item Template	Edit Item	Styles
Name	<input type="text" value="CheckBox1"/>	<input type="checkbox"/> Required?	 Advanced
Label	<input type="text" value="Checkbox"/>	<input type="checkbox"/> Hide label?	 Rules
			 Save
			 Delete

Add some content using the "Text" field above.

Checkbox 

## Text and HTML

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






Cancel Save

### Image

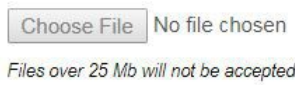
This is used to add images/logos to a form.

#### 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.



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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 move 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.

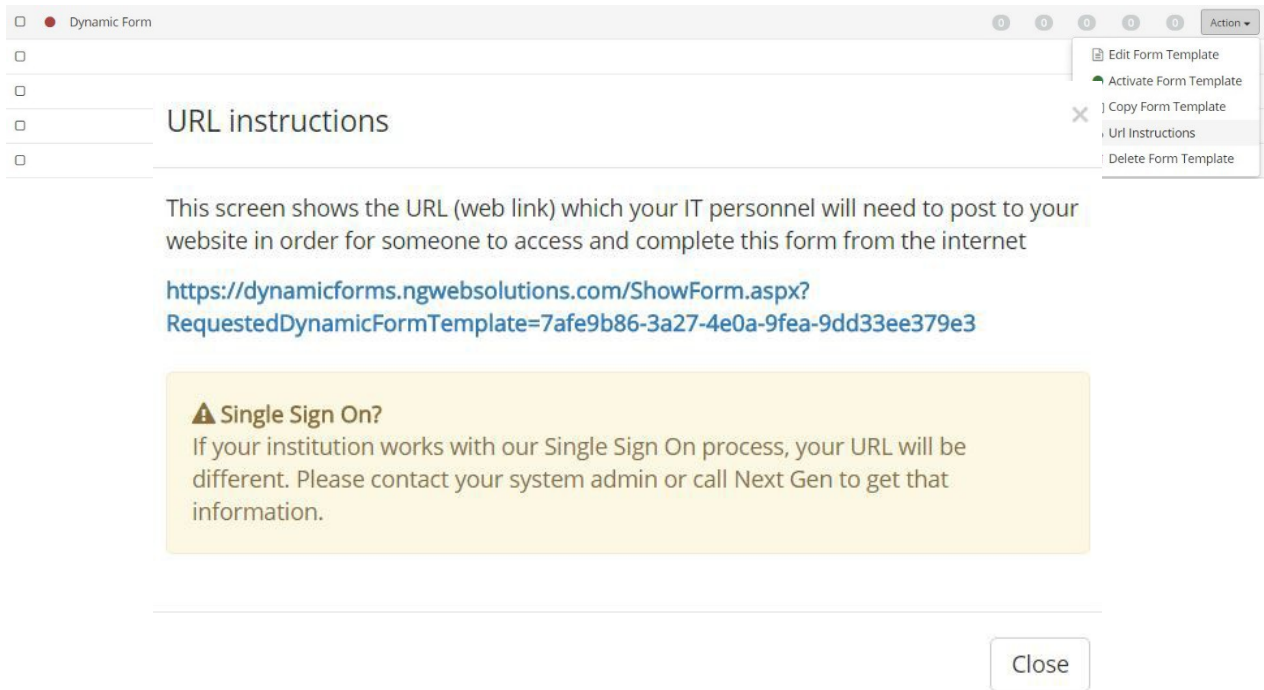
Once you are satisfied with your form, click the home button to return to your department folder.

## 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**, 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=>

## 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

test form - Multi-signature forms  
(Pending | Processed | Archived)

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

Export to Excel

PDF	HTML	Action	Submit Date	Esign Date	Esigned 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		

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 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.

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