**TA/RA Application Tracker – Application Form Creation, Editing, and Integration Tutorial**

This guide provides an in-depth overview of how to **create**, **edit**, **delete**, and **manage** application forms using Microsoft SharePoint, including how the forms connect to SharePoint Lists. The tutorial also explains **branching logic**, how form responses populate list data, and best practices for maintaining your forms and list structure.

**1. Navigating to the SharePoint List**

To get started, log into your SharePoint site.

* On the **left navigation panel**, click **“TA RA Application Tracker”**.
* This will take you to a SharePoint List, where all submitted form responses are stored.
* Think of the list as a **spreadsheet-style database** that’s automatically updated when applicants submit forms.

**2. Accessing and Understanding the Forms Panel**

Once you’re in the tracker list:

* At the top of the page, locate the **toolbar (command bar)**.
* Click on the **“Forms”** button. This opens the Forms Panel where all forms associated with this list are shown.

Each form listed here is directly linked to this SharePoint list. This means:

* Any data entered into a form will immediately appear as a **new row in the list**.
* Each **column in the list** corresponds to a **field on the form**.

**3. Creating a New Form**

To create a new form:

1. Click the **“New Form”** button.
2. A split-view editor will appear:
   * **Left side**: Shows a live preview of your form.
   * **Right side**: Contains the list of available fields and configuration tools.

**Important Tips:**

* Only fields with a **checkmark** next to them will appear on the form.
* Unchecked fields remain in the SharePoint list but are hidden from the form.
* Fields can be rearranged later in the list, but their order in the form matters for usability.

**4. Editing Fields and Customizing the Form**

**➤ Adding a New Field**

Scroll to the bottom of the form and click **“Add new field”**. You’ll be presented with different input types:

* **Text Line** – For single-line entries like Name, Email.
* **Text Area** – For multi-line input like Personal Statements.
* **Choice** – Dropdowns or multiple choice questions.
* **Number**, **Date**, **Yes/No**, etc.

After choosing a field type:

* Set a **Title** (the label the user sees).
* Provide a **Description** (help text for clarification).
* Decide whether the field is **Required**.

You can always change the field type later using the dropdown inside the field settings.

**5. Previewing & Sending the Form**

After configuring the form:

* Click **“Send Form”** in the upper-right corner.
* Copy the link generated. This is the URL you distribute to applicants (TAs or RAs).

When an applicant visits this link:

* They will see a **user friendly version** of the form you built.
* Upon submission, the form’s data is instantly stored in the SharePoint list.

**6. Controlling Form Availability**

Each form has a status:

* **Open** – Accepting responses.
* **Closed** – Not accepting submissions.

To toggle this:

1. Click the **three-dot menu (⋮)** next to a form.
2. Select **“Stop accepting responses”** or **“Start accepting responses”**.

This allows you to control the form availability during application windows.

**7. Using Branching (Conditional Logic)**

**Branching** allows you to customize the form experience based on previous answers — similar to using “if/else” statements in programming.

**How to Add Branching:**

1. Click the **three-dot menu (⋮)** on a field and select **“Add Branching”**, or
2. Use the **DNA icon** in the left panel to access branching controls.

**Example Use Case:**

**Question:** *Do you have prior experience at GMU?*

* If **Yes** → Skip onboarding questions and jump to the RA/TA preference.
* If **No** → Continue with onboarding-related questions (I-9, background checks, etc.).

Branching ensures applicants only see **relevant questions**, improving both UX and data quality.

**8. Real-Time List Integration**

As applicants submit their forms:

* Each **form response populates the SharePoint list** as a new entry (row).
* Each **field in the form is a column** in the list.

**Example:**

Form has fields:

* First Name
* Prior GMU Experience
* TA or RA Role Preference

All these fields are saved as **columns in the SharePoint list**. You can open the list to see and manage all applicant data in one place.

**9. Editing or Deleting Form Fields**

If you want to change the form later:

**To Edit a Field:**

* Click the field in the form preview.
* Use the field settings on the right to change its title, type, or requirements.

**To Delete a Field:**

* Open the field settings.
* Click **Delete**.

When a field is deleted:

* It is also removed from the SharePoint list.

When a new field is added:

* It appears at the **end of the list**, but you can **drag and reorder** it.

**10. Best Practices**

* Use **branching** to simplify the user experience and collect only relevant information.
* Keep your form layout intuitive and grouped logically (e.g., Personal Info, Academic Info, Availability).
* Frequently **review form fields** and clean up any unused or outdated ones.
* Name each form clearly and update status regularly to avoid confusion.

**Summary**

Here’s what this tutorial covered: ✅ How to access the SharePoint List and Forms Panel  
✅ Creating new forms and customizing fields  
✅ Setting form availability (open/closed)  
✅ Adding conditional logic using branching  
✅ Linking form submissions directly to SharePoint list columns  
✅ Editing, deleting, and reordering form fields