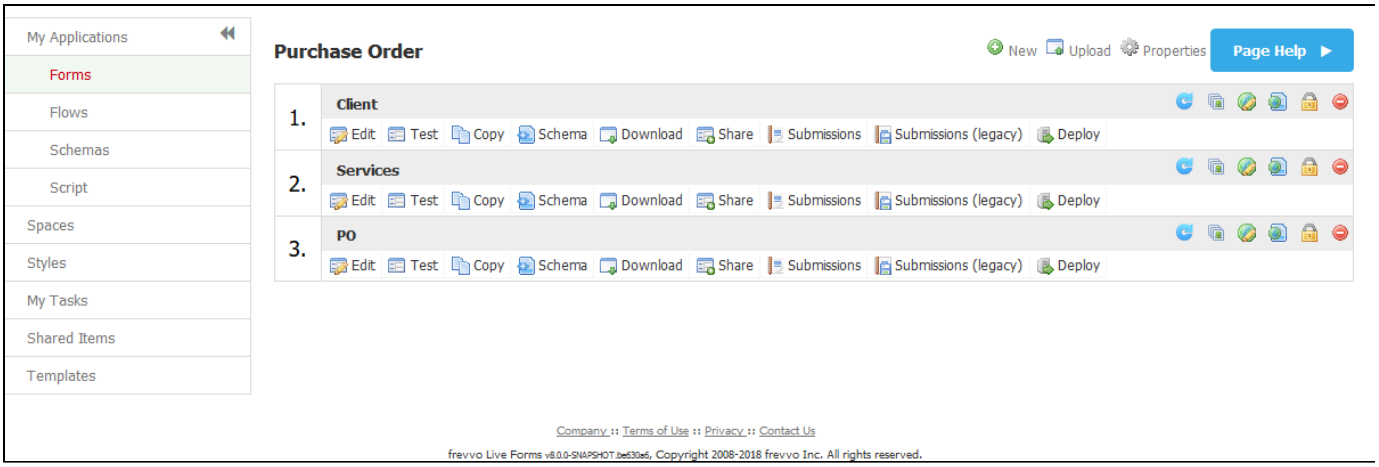
Forms Home Page

The forms home page appears after you create/edit an application or install a Form Template application.

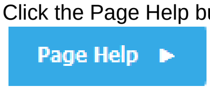


On This Page:

- Refresh Searchable Fields
- Assigning a Thumbnail Icon to a Form
- Production Forms
- Deleting Forms
- Uploading/Replacing Forms
- Designer ACL

You won't see any forms the first time you use Live Forms, but as you soon as you create some or you install a form template application you'll see them here. Forms are single page.

Click the Page Help button



for information about the features on the Forms Home page. This feature is only available for Cloud customers.

There are three icons at the top of the forms home page. Each is described below.

- Click the  icon to create a new form. Once you have created some forms, the forms will be displayed based on the creation date with the oldest form on top. You cannot change this default sort order.
- Click the  icon to upload a form zipfile previously downloaded to disk.
- Click the  icon to edit the application properties.

To the right of each form name are six icons. Each is described below.

- Click the  Refresh icon to update previous submissions when a change is made to the Searchable Fields in your form. Refer to Refresh Searchable Fields for the details.
- Click the  icon to attach a thumbnail icon to your form. You can select one of the icons provided by Live Forms or you can upload your own. The icons will display when you access your forms/flows from a Live Forms space on mobile devices (iPhone and iPad) mobile devices. See below.
- Click the  icon to internationalize a form with translations in different languages.
- Click the

icon to publish your form as a template that you can use when creating other new forms. See Templates.
- The next icon controls the Visibility of the form. Clicking on the
  icon brings up an enhanced Access Control wizard that allows the designer to specify runtime access for the form, configure selected users or roles that can execute the form and view/edit form submissions.
- Click the
  icon to delete the form. Keep in mind there is no Undo feature so this action is permanent.

> Deleting a form also deletes all associated form submissions and any saved in-process form instances. See replacing forms.

Below each form name are eight more icons. Each is described below.

- Click the
  icon to open your form and edit it in the Forms Designer.
- Click the
  icon to test your form. See Testing Forms.
- Click the
  to make a copy of your form. The newly copied form will be independent from the original; any changes you make to the copy won't affect the original and vice versa. Since the newly copied form will be your most recently created form, it will appear at the bottom of your list of forms. Access Control permissions assigned to the original form are retained in the copy.
- Click the
  icon to download the automatically generated schema associated with your form. This schema will contain all the controls added to your form from the Palette. This will not contain controls added to your form from your own schemas. See Schemas for more details.
- Click the
  icon to download a zipped version of the form to disk. A single zip file will be created with the name of your form, followed by _form.zip. This icon also appears on the Applications home page so you can zip your entire application, including all the forms it contains. The zip file name will be the name of your application, followed by _app.zip.
- Click the
  icon to share your forms in a number of different ways. Before you click this remember to mark your form public or you will not be able to share it with others. See Sharing Forms.
- Click the
  icon to view the submissions for this form. Click the
  icon to view submissions in the Legacy view.

  > The Export of submissions to Excel feature has been replaced by the Download to CSV. If you have not used the Export to Excel feature in the past, we recommend that you become familiar with the Download to CSV.
  > You can still use the Export to Excel feature by accessing it from the Submissions Legacy view. However, the Legacy Submissions view and the Export to Excel may be removed in a future release.

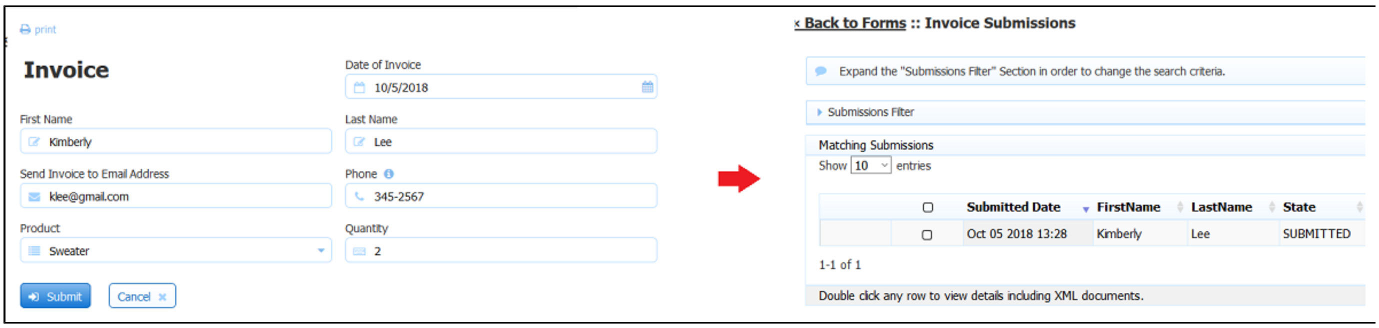
- Click the
  icon to deploy a form to Production state and remove the Development watermark. This toggles the icon to the
  undeploy icon. If your form server license enables a limited number of Production forms you will get an error message when you hit your license production form limit.
- Click the
  icon to undeploy a form and move it from the Production state back to the Development state.

Refresh Searchable Fields

Searchable Fields are fields in your form that can be used to search submissions and tasks. It is up to the forms designer to designate which controls should be set up as Searchable fields.

Form requirements may change over time. What happens if you need to add or delete Searchable fields and you want your previous submissions to reflect your changes? Designers, tenant or superuser administrators or any user given the permission to edit a form can initiate a Refresh Searchable Fields process for a particular form. Once the process completes, new submissions will reflect the changes made to the Searchable Fields but to show them in previous submissions you must run the Refresh Searchable Fields process for your form.

For example, let's say you have an Invoice form with the First Name and Last Name fields set up as searchable fields. You can search existing submissions or tasks by setting up a filter using the data in these fields.



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Your users have requested the ability to search submissions and tasks by product name in addition to the First and Last name of the customer. You must add the Product Name field to the list of Searchable Fields in your form.

1. Login as a designer user or your production account if the form is deployed.
2. Edit the Application where your form is located.
3. Edit your flow. Click on the toolbar to display the form properties.
4. Add the Product Name control in your form to the Searchable Fields list using the Setup Searchable Fields wizard.

Click here to to see how to do that.

Searchable fields configured for a form or flow are the fields that may be used to filter submissions in the submissions view. By default, all your data is saved as an XML document. This is the most efficient way to store/access your data both in terms of speed as well as storage. However, if you prefer to view your data via the submissions user interface, you can choose which fields are available to the user as search criteria in addition to the XML data.

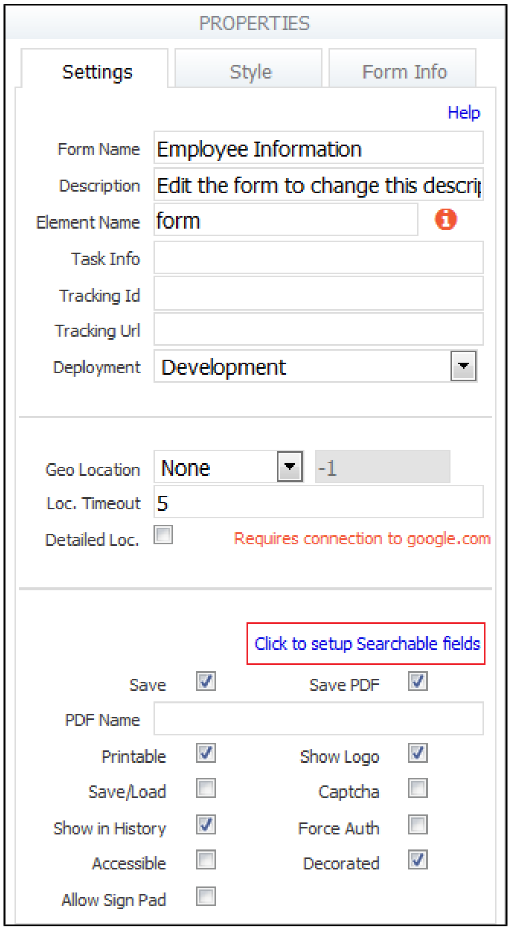
Considerations when deciding which types of fields to configure are listed below.

- Searchable fields are indexed for easy search of form/flow Submissions. They can also be used when searching Tasks on a user's Task List. You will see columns for the controls in your form/flow designated as Searchable fields in the Submissions table. This is helpful when trying to locate a particular submission from a long list. Searchable Fields are downloaded into the Submissions Download to a CSV file along with the submission default columns.
  - Cloud customers can configure up to 20 Searchable Fields.
  - In-house customers can change change the default value by adding the frevvo.max.searchable.fields configuration parameter to the <frevvo-home>\tomcat\conf\Catalina\localhost\frevvo.xml file.
- Saved fields do affect performance as they are independently stored in addition to XML data. This can significantly reduce performance, especially for large forms and require additional storage in the repository. Saved fields are not rendered in the submission table and cannot be used as search criteria for submissions. The **only** reason to configure Saved fields is if you want to use the Export to Excel feature which is available on the Legacy Submissions view

> The Export of submissions to Excel feature has been replaced by the Download to CSV. If you have not used the Export to Excel feature in the past, we recommend that you become familiar with the Download to CSV . You can still use the Export to Excel feature by accessing it from the Submissions Legacy view. However, the Legacy Submissions view and the Export to Excel may be removed in a future release.

Designers should carefully consider which fields to designate as Searchable fields. The selection of the correct fields as search criteria can be very helpful with submission and Task List searches.

Clicking on the **Click to setup Searchable fields** link displays the setup wizard. This link is on the form's properties as shown below. If you have navigated away from the form's properties and instead see a control properties panel, just click anywhere on the toolbar to return to the form's properties.



Searchable Field wizard

The wizard displays the fields from your form/flow. Only controls that are considered form data will be listed. For Example, the link, signature, image, upload, trigger, section, PageBreak, Message, Form Viewer and video controls will not show up in the Searchable field lists as there is no value to save or query against. Also, group controls (tabs, panels, repeats) will not show up on the list of Available Fields.

- We do not recommend using columns from Tables or Repeats as Searchable fields. The data will be hard to interpret since there can be multiple data values for the same field.
- Do not select a Textarea field as a Searchable Field if the amount of text stored in the field is greater than 32k.
- Searching submissions using a Repeat control from schema is not supported.
- If the value of a field contains the < sign, the data in the Submissions Table will be incomplete. For example, if the value = a<b only the "a" will show in the Submission Table.

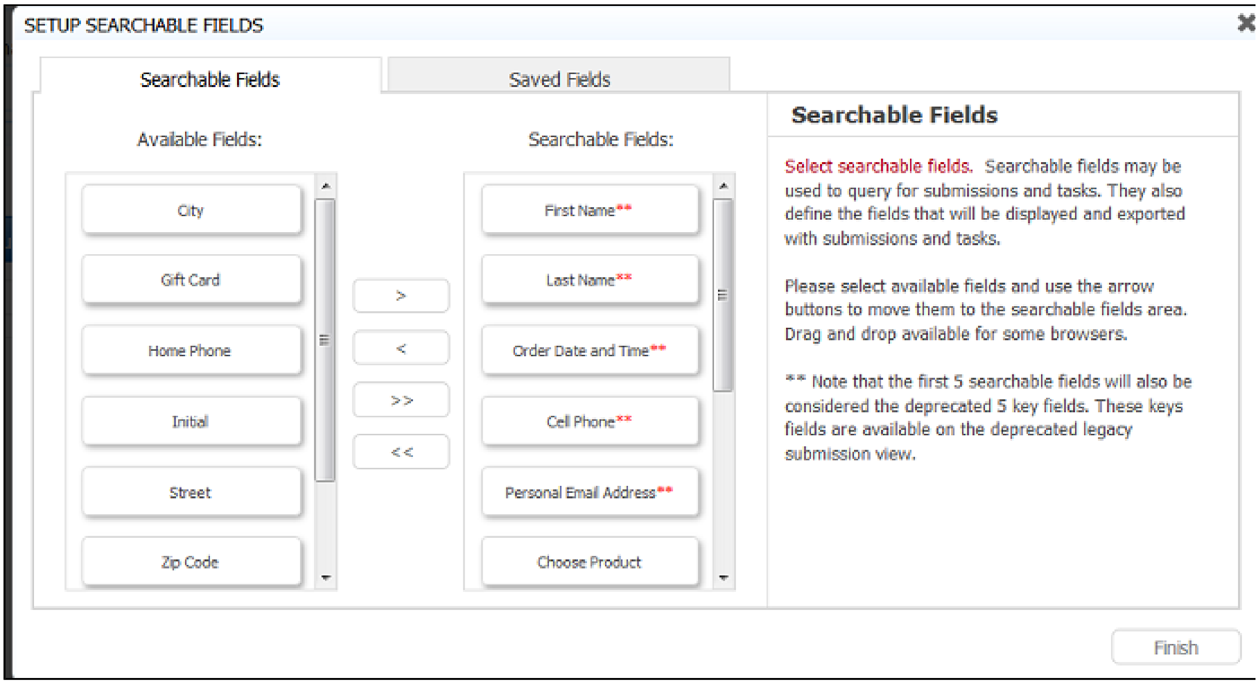
Move the the fields listed in the **Available Fields** tab that you want to use as search criteria to the **Searchable Fields tab**. You can change the order of the fields when you move them into the **Searchable Fields** area. The order of the form fields will be reflected in the Submission Table and the export to a csv file once existing submissions are resubmitted or a new submission is created.

There are two ways to select/unselect or reorder Searchable fields :

- Drag and Drop - You can drag the fields from the **Available Fields** list and drop them into the **Searchable Fields** list if you re using Firefox, Chrome or Safari browsers. Items may be dragged between lists and within the Searchable Fields list. Items may be dropped between existing items and before the top-most item and below the bottom item. Only a single item may be dragged. Currently, the drag and drop function will not work in the Internet Explorer browsers. This issue will be addressed in a future release.
- Center **arrow** buttons
  - The > right arrow moves the selected field from the **Available Fields** list to the bottom of the **Searchable Fields** list.
  - The < left arrow moves the selected field from the **Saved Fields** list to the bottom of the **Available Fields** list.
  - The >> double right arrows move all the form fields in the **Available Fields** list to the **Searchable Fields** list.
  - The << double left arrow moves all the form fields in the **Saved Fields** list to the **Available Fields** list.

Click **Finish** to save. Selecting the **X** in the upper right corner cancels any changes. Remember to save your changes when you exit out of the designer.

Controls are listed in the Available and Searchable Lists using control labels. If you change the label of a control in your form that was previously added to the Searchable Fields list the control will remain in the list reflecting the new label. In a Live Forms flow, the label can be different for controls with the same name in different activities. Controls are listed using the control name. If the name changes, it will unset the Searchable field. The newly renamed control will now show on the Available list and the designer must move it to the Searchable List again.

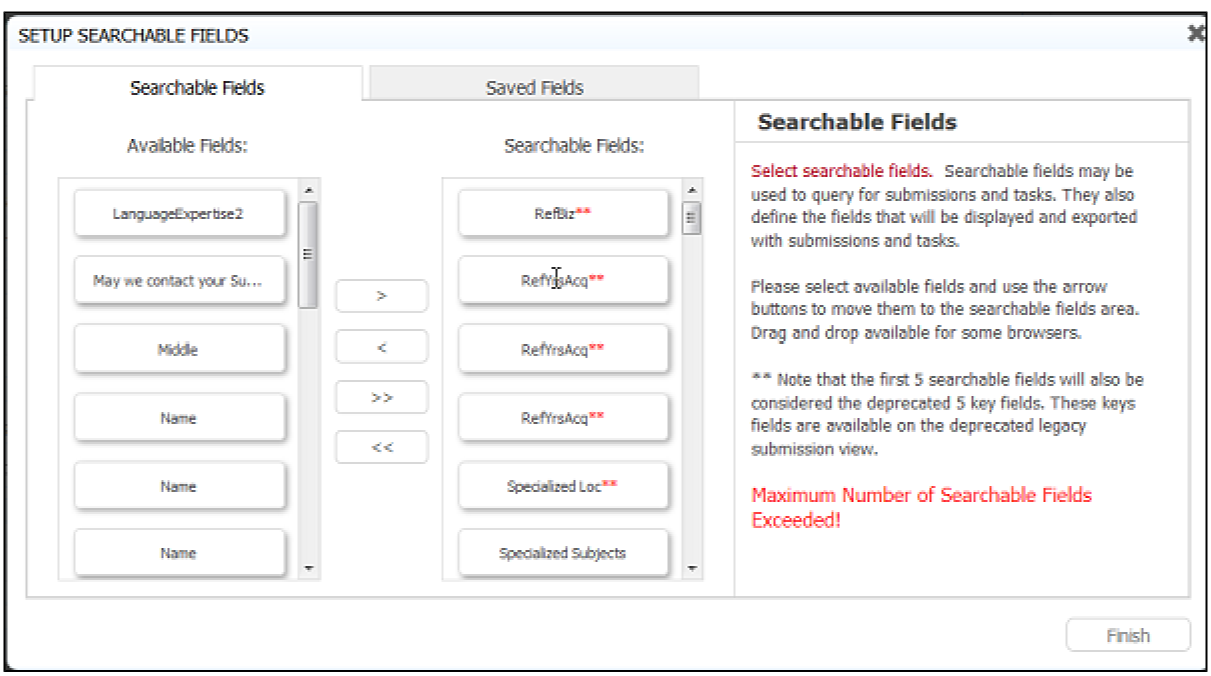


Note the first five fields in the Searchable Fields list are marked with double asterisks. These 5 searchable fields will be the key fields for the submission in the legacy view.

Maximum Number of Searchable Fields

Cloud customers can configure up to 20 Searchable fields. In-house customers can change the maximum number of Searchable Fields with a configuration parameter.

When an attempt is made to add more than the maximum configured number of Searchable fields, an error message ("Maximum Number of Searchable Fields Exceeded!"). displays on the lower right of the screen and will disappear after a short time. Any fields in excess of the maximum configured number will not be allowed.



Adding/Removing Searchable Fields

If you make changes to Searchable Fields in a form or flow, the changes will take affect for new submissions. If you want to update existing submissions to reflect your changes, run the Refresh Searchable Fields process.

Searchable fields can be refreshed for:

- All forms/flows in all tenants (in-house) or a specific tenant (Cloud or in-house) - must be initiated by the frevvo Cloud or customer in-house superuser administrator. Cloud customers must contact frevvo to request a refresh of Searchable fields for your entire tenant.

  > frevvo will run the Refresh process during a time when your users are NOT using Live Forms.

  In-house superuser administrators should refer to the Refresh Searchable Fields topic for the instructions.
- An individual form - can be initiated by Designers (owners), Tenant Admins or any designer user given permission to edit forms/flows for a Live Forms Cloud or in-house installation. Refer to Refresh Searchable Fields for a Form for the details.
- An individual flow - can be initiated by Designers (owners), Tenant Admins or any designer user given permission to edit forms/flows for a Live Forms Cloud or in-house installation. Refer to Refresh Searchable Fields for a Flow for the details

> **If refreshing production forms or flows, run the job during a time period when the forms or flows are not being used.**

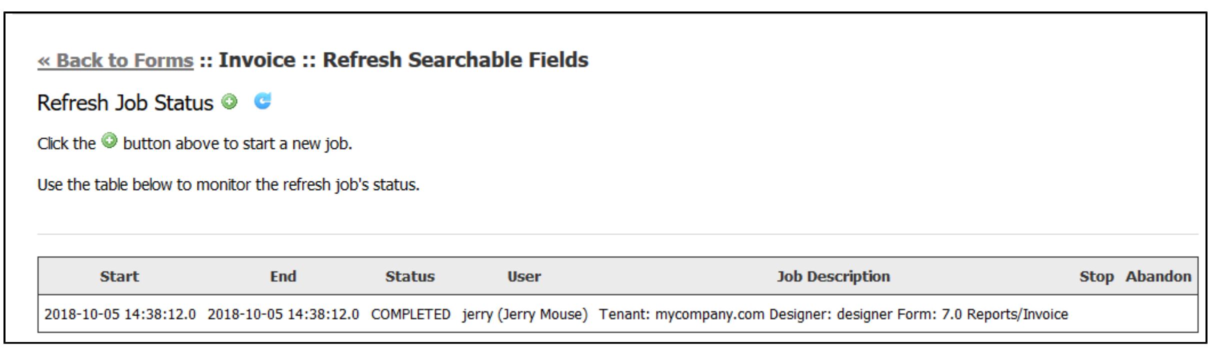
Saved Fields tab

You will see a Saved Fields tab in addition to the Searchable Fields tab. This tab displays only when the Legacy Submissions view is configured as it is in the Live Forms cloud. The only reason to configure Saved Fields for a form/flow is if you want to use the Export to Excel which is only available in the Legacy Submissions view. Remember**, Saved Fields** are stored in the database when the form/flow is completed. This can significantly reduce performance, especially for large forms and require additional storage in the repository.

> The Export of submissions to Excel feature has been replaced by the Download to CSV. If you have not used the Export to Excel feature in the past, we recommend that you become familiar with the Download to CSV .
> You can still use the Export to Excel feature by accessing it from the Submissions Legacy view. However, the Legacy Submissions view and the Export to Excel may be removed in a future release.

In-house customers can choose to hide the Legacy Submissions view with a configuration parameter. If the Legacy submission view is not visible, the Saved Fields tab is not displayed in the Form/Flow designers and the Export to Excel feature is not available.

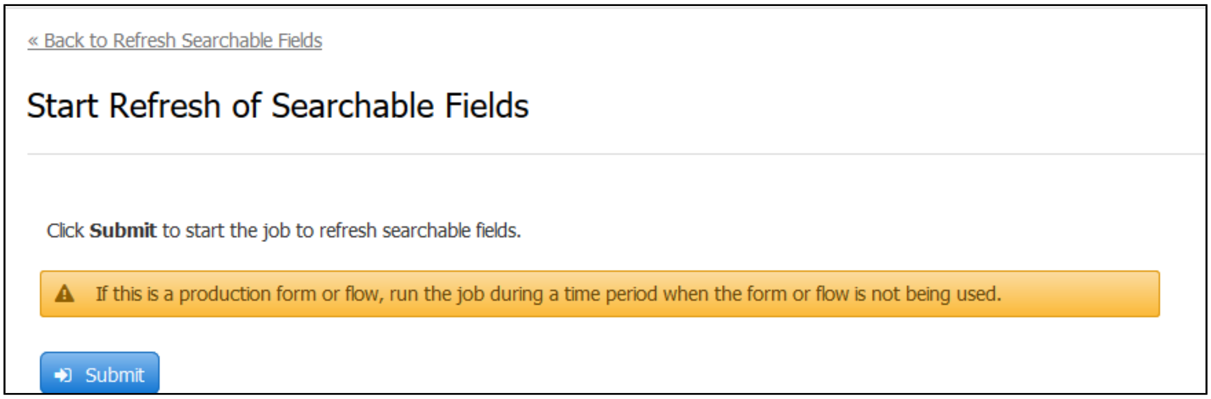
5. Follow these steps to run the Refresh Searchable Fields process.
   a. Click the
      Refresh icon for the form you want to update.
   b. Information about previously run Refresh processes for the form display in a table.



- Starting and Ending date/Time of the process
- Status of the process - completed/failed/stopped
- The user id and name of the process initiator
- A description providing the Application/Form Name

   c. Click the

icon to start the Refresh Process.



« Back to Refresh Searchable Fields

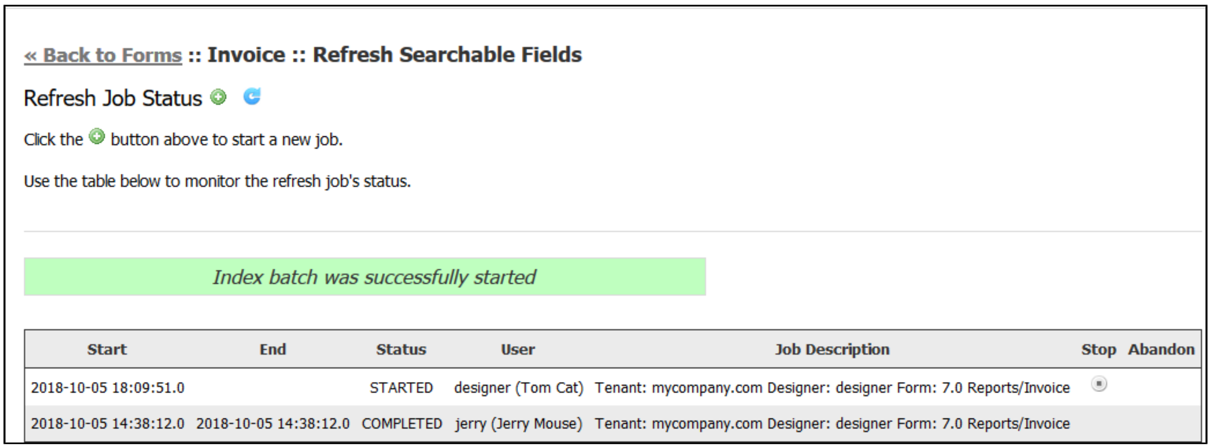
Start Refresh of Searchable Fields

Click **Submit** to start the job to refresh searchable fields.

If this is a production form or flow, run the job during a time period when the form or flow is not being used.

Submit

d. Click Submit.
e. The message "Index batch was successfully started" displays and the submitted process shows in the Refresh Process list table.



« Back to Forms :: Invoice :: Refresh Searchable Fields

Refresh Job Status

Click the button above to start a new job.

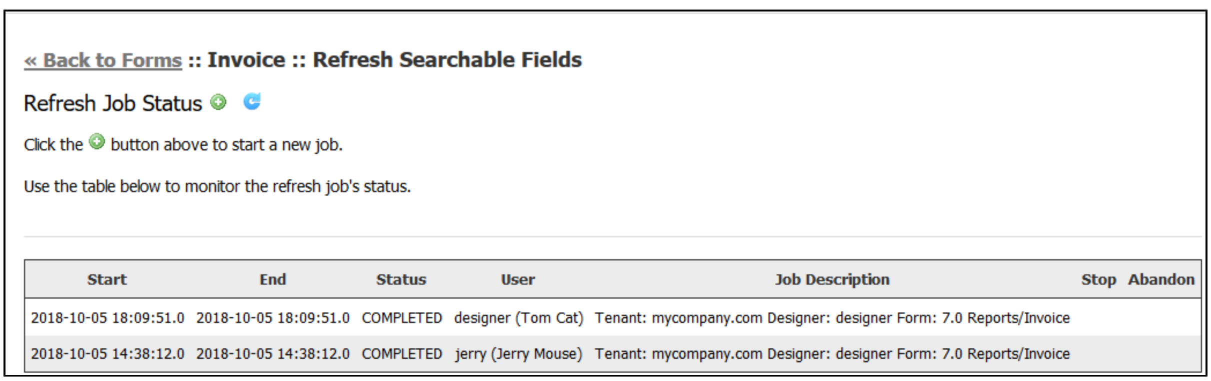
Use the table below to monitor the refresh job's status.

Index batch was successfully started

Start	End	Status	User	Job Description	Stop	Abandon
2018-10-05 18:09:51.0		STARTED	designer (Tom Cat)	Tenant: mycompany.com Designer: designer Form: 7.0 Reports/Invoice		
2018-10-05 14:38:12.0	2018-10-05 14:38:12.0	COMPLETED	jerry (Jerry Mouse)	Tenant: mycompany.com Designer: designer Form: 7.0 Reports/Invoice		

f. Click the

Refresh icon to update the table with the most recent information.



« Back to Forms :: Invoice :: Refresh Searchable Fields

Refresh Job Status

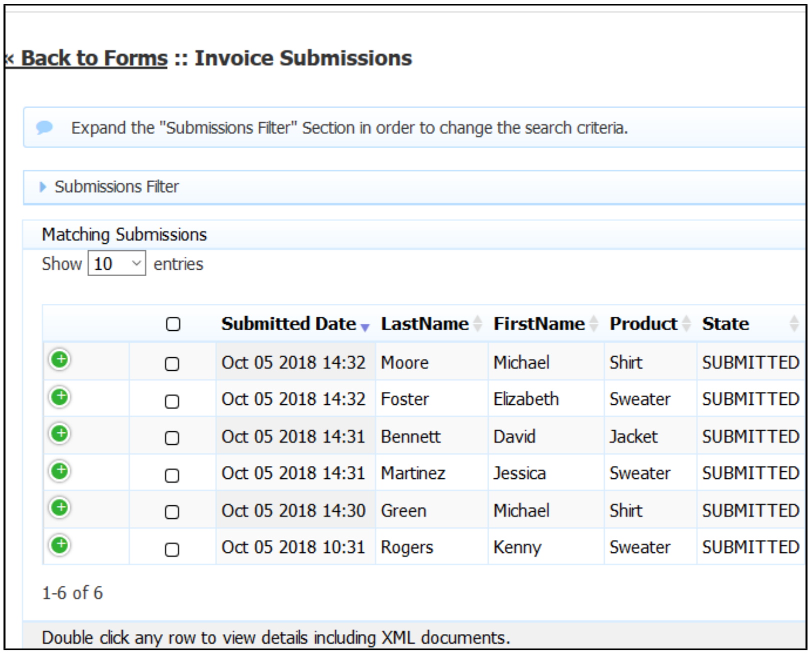
Click the button above to start a new job.

Use the table below to monitor the refresh job's status.

Start	End	Status	User	Job Description	Stop	Abandon
2018-10-05 18:09:51.0	2018-10-05 18:09:51.0	COMPLETED	designer (Tom Cat)	Tenant: mycompany.com Designer: designer Form: 7.0 Reports/Invoice		
2018-10-05 14:38:12.0	2018-10-05 14:38:12.0	COMPLETED	jerry (Jerry Mouse)	Tenant: mycompany.com Designer: designer Form: 7.0 Reports/Invoice		

g. Click the **Back to Forms** link to return to the Forms Home Page.

Once the Refresh Searchable Fields process for the form is completed, the Product control and the associated data displays as a column in the Submissions Table.



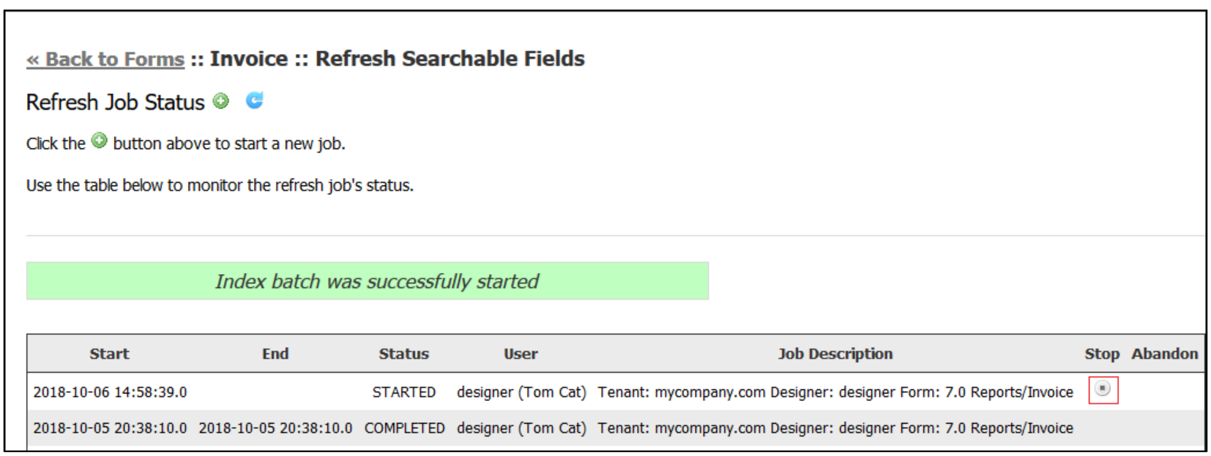
The Refresh Process can be stopped or abandoned once started.

Stopping the Refresh Searchable Fields Process

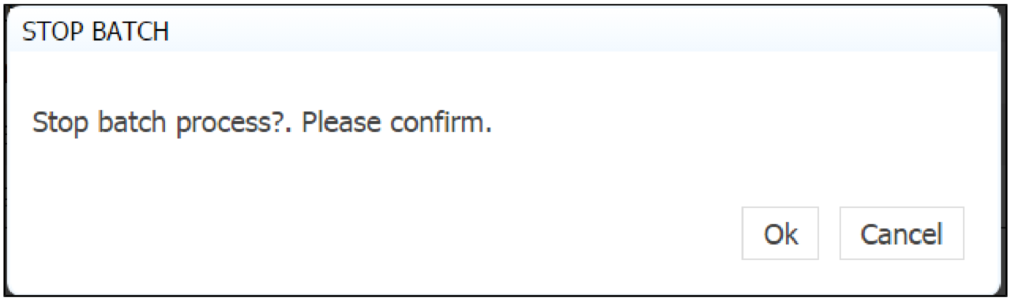
Once you have initiated the Refresh Searchable Fields process, the Live Forms UI allows for the job to be stopped or aborted. The process can be stopped if it is in the **STARTING** or **STARTED** state.

You will notice a **Stop** column in the row in the table for the process that was started. To stop the job:

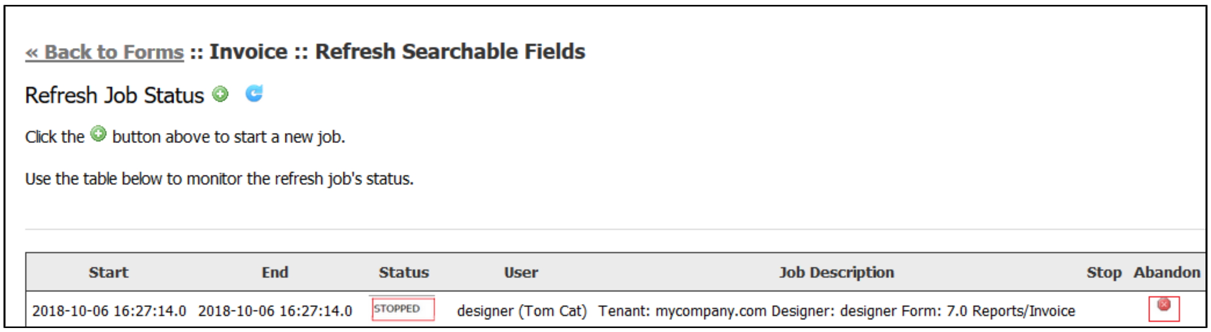
1. Click the **Stop** icon
   
   .



2. Click **Ok** to confirm.



3. When the process is stopped, the status column will update.



Restarting a Stopped Refresh Searchable Fields Process

When the Refresh process runs, tables that store the state of the process are created in the frevvo database. By default, if a process were to fail or be stopped, starting it again would restart the failed/stopped job from where it failed/stopped.

To restart a Stopped/Failed refresh process, simply start the batch job again with same tenant and it will resume the last stopped job.

To prevent the last stopped job from restarting, change the status to Abandoned.

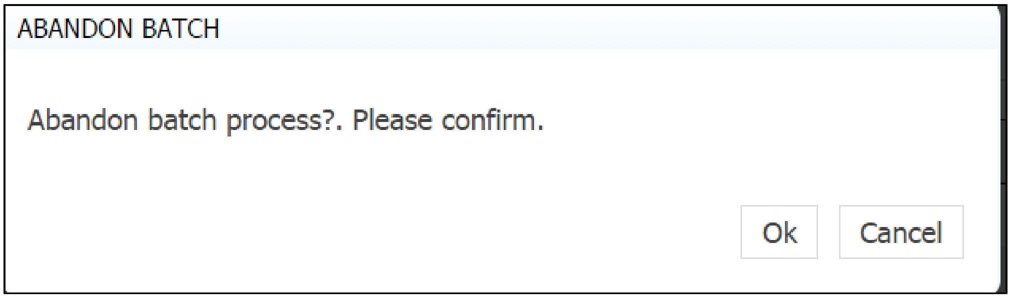
Abandoning the Refresh Searchable Fields Process

The Refresh Searchable Fields process can be abandoned if it is not in the **STARTING** or **STARTED** state. The process must be stopped to mark it as abandoned. This prevents it from being restarted. You may want to abandon a batch job if it failed and restarting it would result in another failure. Abandoning the batch job allows you to start over again with a new process.

When you stop a Refresh process, you will notice **Stop and Abandon** columns in the row in the table for the process that was started. To abandon the job:

1. Stop the Refresh Searchable Fields Process
2. Click the
   
   Abandon icon in the row in the **Abandon** column for the process you want to prevent from restarting.

3. Click **Ok** to confirm.



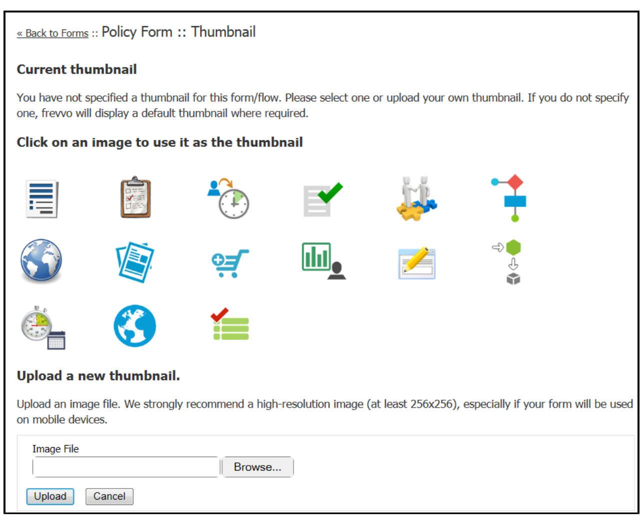
4. The Refresh Job Status screen will update.

Assigning a Thumbnail Icon to a Form

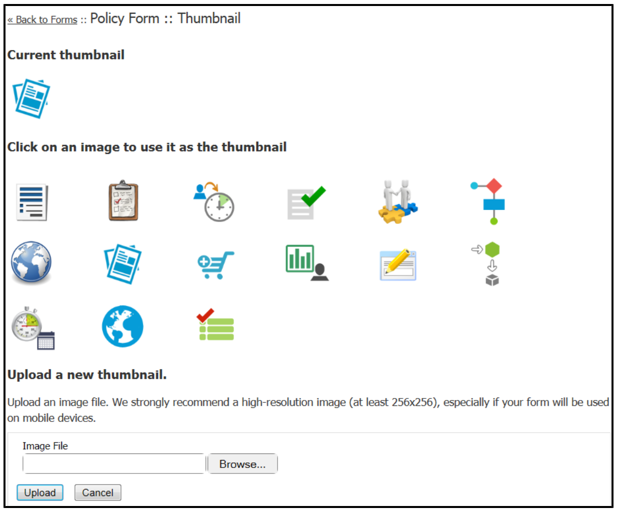
You can attach a thumbnail icon to a form/flow by clicking in the

icon or the Forms/Flows Home Page. You can select one of the icons provided by Live Forms or you can upload your own. The icons will display when you access your forms/flows from a Live Forms space on mobile devices (iPhone and iPad) mobile devices. See below. If you do not specify an icon for your form/flow, Live Forms will display a default thumbnail where required.

When you first click on the icon, you will see a list of icons provided by Live Forms.



Since the form/flow does not have an icon assigned at this time, the Current thumbnail section of the screen will display the message "You have not specified a thumbnail for this form/flow. Please select one or upload your own thumbnail. If you do not specify one, frevvo will display a default thumbnail where required." Once you select or upload a thumbnail, the Current thumbnail section will update with that icon. You will not be able to delete the current thumbnail once it has been assigned but if you update the form/flow icon by selecting another one from the list or by uploading an image file, the updated icon will be reflected in the Current thumbnail section.



If thumbnail changes are not reflected immediately, refresh the screen.

Production Forms

New forms have a default deployment state of either Production or Development. The

icon on each form toggles this state. Forms in the Development state have a watermark. Change them to Production to remove the watermark. Your license key controls the number of forms that can be set to Production.

The deployment state defaults to Development irrespective of the default deployment state set by your license key and by your tenant admin for the following scenarios:

- When a form is uploaded into your application from disk
- When you make a copy of your form
- When you create a new form from a form template other than the default template

To manage production forms go to your My Account -> Manage Production forms page. See managing production forms for more information

Deleting Forms

When you delete a form, by clicking the

icon the form is permanently removed and cannot be restored. The delete operation also deletes all submissions from Live Forms' submission repository and any saved in process form instances.

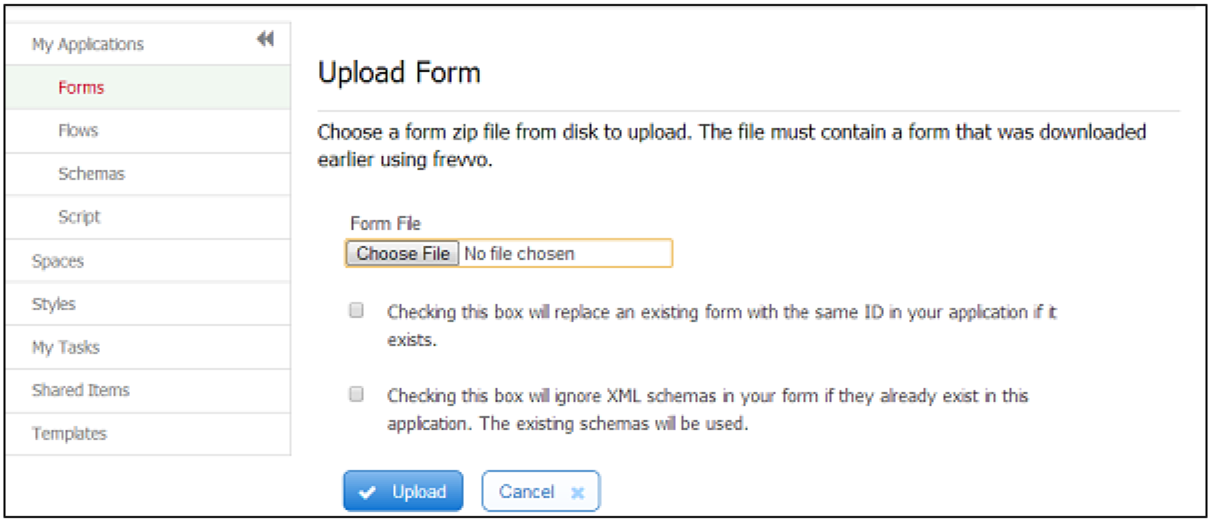
Before deleting you may wish to download a copy of the form to disk by clicking the

download icon. Click deleting an application and deleting/replacing flows for information on deleting applications and flows.

Uploading/Replacing Forms

If your goal is to update your form to a new version that you had previously downloaded to disk or to revert to an older version previously downloaded to disk, do not first delete the form since, as stated, this removes all associated saved/submitted/pending form instances. Instead leave the original as it is and upload the version from disk by clicking the

upload icon. A dialog will display that lets you browse to the form on disk and gives you the option of replacing the current with this new version. Checking the option to ignore XML schemas in the form being uploaded if those schemas already exist in the application, results in the existing schemas being used.



Designer ACL

Designer users can grant other users the ability to edit a form and access related submissions. The Access Control and Shared Items topic explains the details. This permission gives Users with this permission also can run the process to Refresh Searchable Fields.