

Form Setting Properties

Each form setting property is described below.

PROPERTIES

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Element Name i

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Loc. Timeout

Detailed Loc. Requires connection to google.com

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Save Save PDF

PDF Name

Printable Show Logo

Save/Load Captcha

Show in History Force Auth

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Allow Sign Pad

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Form Name

This is the name you see on the Forms home page where your forms are listed. We recommend changing the name to make it more meaningful than the arbitrary name assigned when you create it, but keep in mind it is a working name only, so users will not see it. Form names longer than 60 characters will be truncated. It is recommended that you name your form/flows using characters that are suitable for filenames. Following the [POSIX filename standard](#) (A–Z a–z 0–9 . _ -) will ensure it works.

Description

By default all form descriptions say, "Edit the form to change this description," but you can change this if you wish. The description appears as a tooltip when you mouse over the area just to the right of the form's share



icon on Forms home page. You also see this description when you view individual submission documents.

Element Name

The default value for the Element Name property is *form*. The root element name in the submission xml of a form created from the designer palette is determined by the value in this field. It needs to be a valid XML element name. The designer can now change the name of the form without impacting the element name. Form schema and the Live Forms generated xml file show the element name. When the form name is updated, and 'Element Name' is kept the same, previous submissions can be initialized successfully. When 'Element Name' is updated, previous submissions cannot be initialized.

If you change the element name, all existing submissions will become invalid and you will see the error message. "Submission is not valid. An incompatible change was made to the form/flow."

Visibility

The visibility field has been removed from the form/flow property pane in the Live Forms designers. Form Visibility is selected via the [Access Control List](#) wizard. You can access the wizard by clicking on the



icon on the [Forms Home Page](#) or the [Flows Home Page](#) for your form/flow. If you are in the form/flow designers, click the



icon in the toolbar to display the wizard.

The choices for form visibility are:

- Private - only the owner can edit, test or use the form. The owner must log in to Live Forms.
- Public In Tenant - the form is usable to anyone who has an account (username/password) and is logged in to your tenant.
- Public - anyone can use it even if they are not logged in.
- Custom - the designer may configure runtime access to a form for selected users and/or roles (i.e. users with these roles). Roles and users can be selected via an editable combo-box control. **Custom is not supported for flows because roles and users are assigned to the steps in a flow to indicate who has permission to perform that step. The owning designer always has access to the form/flow.**

Note that irrespective of the Visibility setting only the owner can edit or remove the form/flow.

Task Info

When you save a partially filled form to continue it later, the saved form is accessed via your task list. This field controls the name that gets displayed in the task list. For more details, see the [Tasks documentation](#). This field can use [templated strings](#) for dynamic content, e.g. the Task

Info can contain "Vacation Request for {FirstName} {LastName}" where FirstName and LastName are the names of fields in a form. Before putting the task on your task list, Live Forms will resolve the Task Info string using the actual values of the FirstName and LastName fields e.g. "Vacation Request for Tom Smith".

You access your [Task list](#) from your applications home page. You use the Task list to [perform tasks](#), complete a saved form or work flow, to [view a task's history](#), or [search for tasks you've participated in](#) — a tenant admin can also [search for other users' tasks](#).

Tracking Id

When your form loads it will send a page view event to your Google Analytics account if you enter your Google account tracking ID into this form property. Please refer to Google's documentation for information about finding your Google Analytics tracking ID.

Tracking Url

This property works in conjunction with the Tracking ID and was intended to make it easier to read the long URL's when trying to determine which form/flow is being tracked using Google Analytics. Full functionality will be available in a future release. Please contact [Customer Support](#) for the latest information on this feature. Tracking Url is not available for flows at this time.

Deployment

This field lets you toggle a form between two states: PRODUCTION and DEVELOPMENT. When a form is in the development state it contains a watermark. Deploying the form into the production state removes the watermark.



The screenshot shows a form interface with a yellow banner at the top that reads "Not for production use. To remove this message, please Deploy the form." Below the banner is a "print" icon and a logo for "Healthcare Solutions, LLC". The company address is listed as "500 East Main Street, Suite 330, Branford, CT 06405". Contact information includes "Phone (203) 208-3117" and "Fax (203) 208-3118". The form title is "Confidential Health History". At the bottom, there are three tabs: "General Info", "Medical Info", and "Foods". The "Foods" tab is currently selected. Below the tabs is a "Name" label and a text input field.

You can change the state of your form from the deployment dropdown or you can click on the deployed/undeployed button on the [forms home page](#).

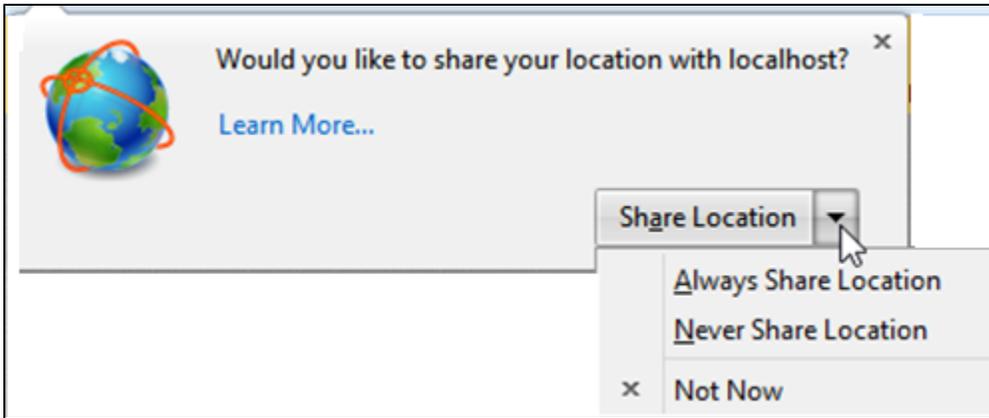
See the [deployment state](#) topic in the Administrator's Guide.

Geo Location

New Live Forms in-house installations must obtain an API key in order to use this feature. Follow the steps listed [here](#) to obtain the key.

You can capture the location where your form was filled in by turning on **Live Forms' Geo location** feature. A forms knows it's current location and will submit that information when the form is completed. Live Forms uses the HTML5 GeoLocation api. The geo api is well supported on tablet, phone and recent laptop/desktop browser versions. This feature works on a desktop or any GPS capable mobile device.

When the form loads in the browser, it will ask for the location. All browsers will show a pop up asking the user's permission to use their location, unless permission was Always granted or refused in a previous session. The user must give permission for **Geo location** to proceed. Here is an example of the request in the Firefox browser:



The **Geo Location** feature works in conjunction with rules that use the form.positionUpdated identifier. You can set up the rule to execute every time the position is updated. See [Business Rules](#) for examples of rules that will do this. Also see [Rules Position Data](#) for the complete list of available build-in data.

You can also collect additional information associated with your location. For example, a section of a Police Incident Report, shown in the image, captures the location where the form was filled in plus the address information associated with it. The last position update will be in the submission metadata of your form or flow but it is NOT automatically added to the XML document . You must create controls (perhaps hidden) and rules to add the location information to the form XML document. The Position Address section of the Police Incident Report has controls and rules to show longitude, latitude, accuracy and/or errors plus the address information.

Position Address	
Street Number	County
15	New Haven County
Street (Line 1)	State
Northeast Industrial Drive	Connecticut
Street (Line 2)	Country
	United States
City	Zip Code
Branford	06405
Complete Street Address	
15 Northeast Industrial Drive, Branford, CT 06405, USA	
Latitude	Accuracy
41.2990138	36
Longitude	Position Error
-72.769245	

Latitude and Longitude display the coordinates of the user location. The accuracy of the location in meters is represented by the value in the Accuracy field - a low Accuracy value means the position is more precise. You can display a position error code and the text description of error message in your form if desired. Error message codes can be 1, 2 or 3:

- 1 - Permission Denied - You will get this error code if the user says no to the access question.
- 2 - Position Unavailable - This error code means the device running the browser cannot get the GPS satellite signal (tunnel, underground).
- 3 - Timeout - The device running the browser times out trying to get the location information.

Latitude	Accuracy
<input type="text"/>	<input type="text"/>
Longitude	
<input type="text"/>	
Position Code	
<input type="text" value="1"/>	
Position Error	
<input type="text" value="This site does not have permission to use the Geolocation API."/>	

You will never see coordinates and error codes in the same form. You get one or the other.

Click on the **Toolbar** in the Forms Designer to display the **Form Properties** panel. Select one of three options from the **Geo Location** dropdown to turn this feature on:

- None - (no location) - this is the default
- On Load - at start time
- Custom - allows the designer to specify a periodic refresh. The default value is 30 seconds. Choosing this method will fire a rule in the specified time. For example, if the field to the right of the **Geo Location** Dropdown was set to 10, the rule would fire every 10 seconds. See below for more details.

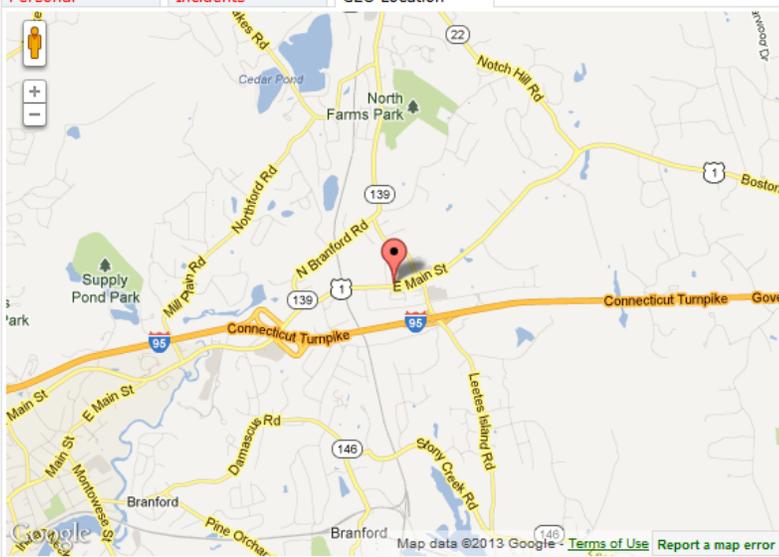
Geo Location	None	<input type="text" value="0"/>
Loc. Timeout	None	
Detailed Loc.	On Load	<input type="checkbox"/>
	Custom	<input type="checkbox"/>
		<input type="text" value="connection to google.com"/>
<input type="button" value="Collect Location"/>		

You can also turn on/off/modify the feature by clicking on a form activity in a flow which will display the form **Properties** panel. The **Loc Timeout** is the amount of time in seconds the location finder in the browser will search to find the location before it times out. The default value is 5 seconds. To capture additional information based on the location via a **Business Rule** or to embed a Google map in your form, you need a connection to **google.com** and you must check the **Detailed Loc.** checkbox on the **Properties** panel. You will need to put a message control in your form where you want the map to display. Type **f-map-div** in the css class field on the message control **Properties** panel. This is a built in java script that cannot be edited to display the map.

PROPERTIES	
Settings	Style
Message	Map will only display in use mode.
Name	Message20
CSS Class	f-map-div
Visible	<input checked="" type="checkbox"/>
Printable	<input checked="" type="checkbox"/>
Publish Control Template	
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	
Drop Submit buttons from the palette to add to the form.	

The map will only display in use mode.

Personal
Incidents
GEO Location



▼ Position Address

Street Number <input type="text"/>	County <input type="text" value="New Haven"/>
Street (Line 1) <input type="text"/>	State <input type="text" value="Connecticut"/>
Street (Line 2) <input type="text"/>	Country <input type="text" value="United States"/>
City <input type="text" value="Branford"/>	Zip Code <input type="text" value="06405"/>
Complete Street Address <input type="text"/>	
Latitude <input type="text" value="41.2986415"/>	Accuracy <input type="text" value="55"/>
Longitude <input type="text" value="-72.7688835"/>	Position Error <input type="text"/>

Setup Searchable Fields

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 the default value by adding the `frevo.max.searchable.fields` configuration parameter to the `<frevo-home>\tomcat\conf\Catalina\localhost\frevo.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.

The screenshot shows the 'PROPERTIES' panel for a form named 'Employee Information'. The 'Settings' tab is selected. The form name is 'Employee Information', the description is 'Edit the form to change this descri...', and the element name is 'form'. The deployment is set to 'Development'. There are also fields for 'Geo Location' (None), 'Loc. Timeout' (5), and 'Detailed Loc.' (Requires connection to google.com). A red box highlights the 'Click to setup Searchable fields' link. Below this are various checkboxes for form settings: Save (checked), Save PDF (checked), Printable (checked), Show Logo (checked), Save/Load (unchecked), Captcha (unchecked), Show in History (checked), Force Auth (unchecked), Accessible (unchecked), Decorated (checked), and Allow Sign Pad (unchecked).

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.

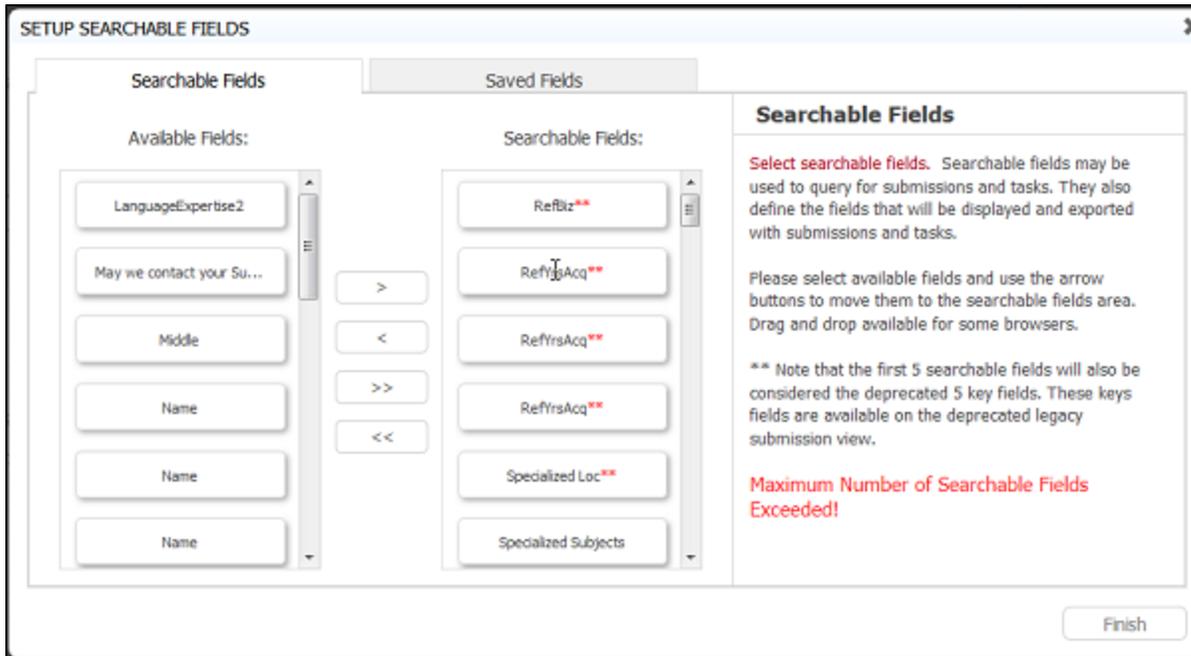
Controls are listed in the Available and Searchable Lists using control labels. If you change the label of a control in your form that was previously added to the Searchable Fields list the control will remain in the list reflecting the new label. In a Live Forms flow, the label can be different for 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 add or remove a field from the Searchable Fields tab, the change will only affect new submissions. In-house customers can manually run the **Insight Batch job** to update older submissions so the field can be used as search criteria.

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. Refer to [Submissions Stored Inside of Live Forms - Legacy View](#) for the details about the Legacy Submission view and the Export to Excel feature.

Printable

If you check a form's printable checkbox a print



icon will be displayed at the top of your form. If you don't want users to print your form, uncheck the checkbox so users will not see the print icon. You can control which form fields are visible in the pdf print view via the [printable property](#) on each field in your form. Refer to [Printing Forms](#) for more information about Print View/submission pdfs, including how to support international characters.

Save

This property is checked by default. When check all submissions for this form will be stored in Live Forms' submission repository. If you uncheck the checkbox, the form submission will still be logged in the submission field repository and you will be able to view the metadata about the submission (time/date submitted, success/failure conditions, etc...) but NO form field data is saved.

The submissions repository can store your form data in three ways -- as data values; as an xml document; and as a pdf form image. By default for efficiency, data is only stored as xml. If you plan to export your form data to an Excel spreadsheet or plan to view your form

data in the submission repository detail view, you must configure your form to save the data field values. See the documentation for [setting up Searchable Fields](#). Also see the documentation for [viewing your data in submission repository](#).

Save PDF

This property can only be checked if you have the save property checked. When checked a PDF image of the file is also saved in Live Forms' submission repository or to [Google drive](#). See the documentation for the [submissions repository](#) for details on viewing the PDFs saved there. Notice all controls, including those disabled or in a signed section, are no longer grayed out in the pdf.

PDF Name

When you check Save PDF on the form Property panel, an optional PDF name field displays. It is only visible when the "Save PDF" property is checked and is disabled when the "Save" property is unchecked. If this new property is set, then it is used to name the generated PDF. You can use templates to name the pdfs .For example, let's say you have an Employee Onboarding form for new hires and you wanted the pdf in the submissions to be named using their last name. Simply add the name of the control in your form that collects the last name as a template ex:{LastName} in the PDF Name property. The pdf for each Employee Onboarding submission will then be named {LastName}.pdf.

If the PDF Name property is empty, then the form name is used as the pdf name. It is recommended that PDF Names use characters that are suitable for filenames. Following the [POSIX filename standard](#) (A–Z a–z 0–9 . _ -) will ensure it works.

PDF names can contain special characters with the exception of curly braces {}.

The screenshot shows the 'PROPERTIES' panel for a form named 'Employee Onboarding'. The 'Settings' tab is selected. The 'Form Name' is 'Employee Onboarding', the 'Description' is 'Edit the form to change this desc...', and the 'Element Name' is 'form'. The 'Deployment' is set to 'Development'. The 'Geo Location' is 'On Load' with a value of '-1' and a 'Loc. Timeout' of '20'. The 'Detailed Loc.' checkbox is checked, with a note 'Requires connection to google.com'. The 'Save' and 'Save PDF' checkboxes are both checked. The 'PDF Name' field is highlighted with a red box and contains the template '{LastName}'. Other settings include 'Printable' (checked), 'Show Logo' (checked), 'Save/Load' (unchecked), 'Captcha' (unchecked), 'Show in History' (checked), 'Force Auth' (unchecked), 'Accessible' (unchecked), and 'Decorated' (checked).

In the submissions, the pdf for the Onboarding of new hire Eric Armani is named as shown.

Attachments		
	Eric.JPG	<i>image/jpeg</i>
	Armani.pdf	<i>application/pdf</i>
	EmployeeSignature_signature.png	<i>image/png</i>
	_2014fw4_accessibledateadded.pdf	<i>application/pdf</i>

Setting Margins, Headers and Footers for the PDF

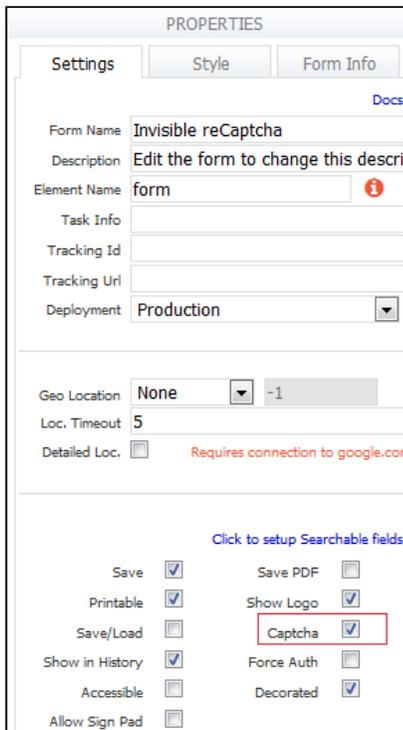
The Live Forms designer can specify the content of the headers, footers and the size of margins for the pdf in a form/flow. Refer to this [document](#) for the details.

Show Logo

This property is checked by default and causes the “powered by Live Forms” logo to appear on your form. Uncheck the checkbox to remove the logo from your form.

Captcha

This feature helps to protect your forms against spamming by automatic submitters. It is only supported for Forms. Check the Captcha checkbox to select it.



PROPERTIES

Settings Style Form Info

[Docs](#)

Form Name: Invisible reCaptcha

Description: Edit the form to change this descri

Element Name: form 

Task Info:

Tracking Id:

Tracking Url:

Deployment: Production

Geo Location: None -1

Loc. Timeout: 5

Detailed Loc. Requires connection to google.com

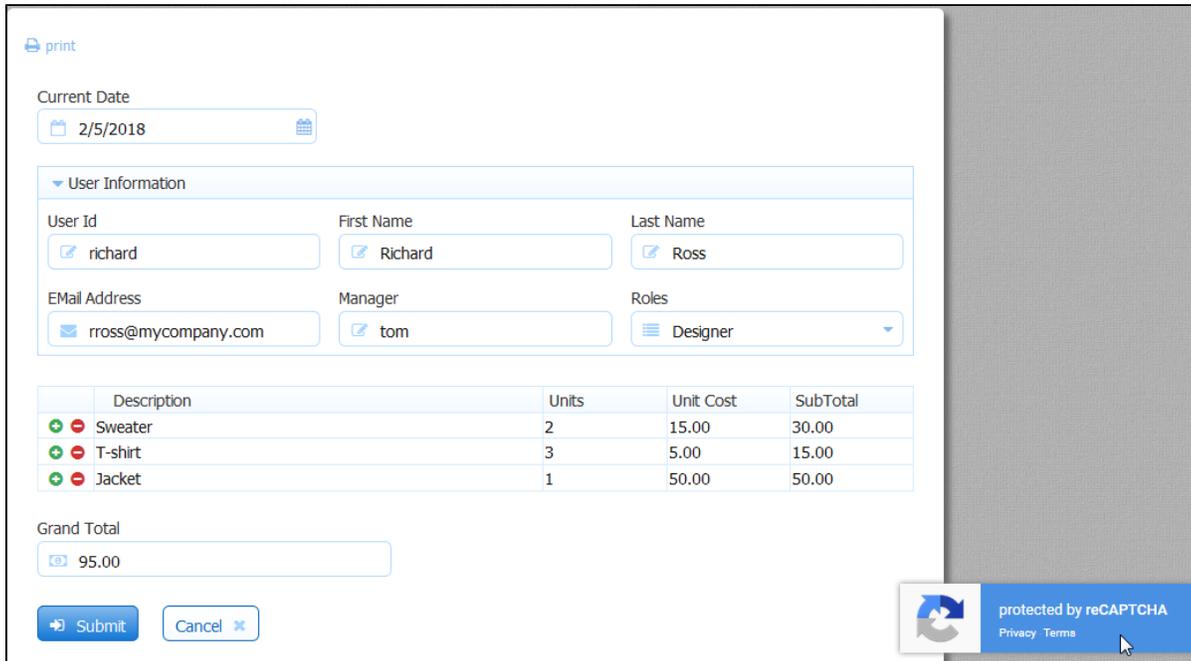
[Click to setup Searchable fields](#)

Save <input checked="" type="checkbox"/>	Save PDF <input type="checkbox"/>
Printable <input checked="" type="checkbox"/>	Show Logo <input checked="" type="checkbox"/>
Save/Load <input type="checkbox"/>	Captcha <input checked="" type="checkbox"/>
Show in History <input checked="" type="checkbox"/>	Force Auth <input type="checkbox"/>
Accessible <input type="checkbox"/>	Decorated <input checked="" type="checkbox"/>
Allow Sign Pad <input type="checkbox"/>	

Live Forms uses Google provided [Invisible reCAPTCHA](#). When using and submitting a form configured with Captcha, the reCAPTCHA logo is displayed in the lower right corner. In most cases, no further action is required by the user

Some less trusted users may see one or more challenge screens when attempting to submit a reCAPTCHA protected form. The challenge screens are grids of images and users are asked to choose the images matching a certain criteria. These are standard reCAPTCHA challenge

screens and frevo has no control over what is presented and when.



The screenshot shows a web form with a 'print' icon at the top left. Below it is a 'Current Date' field with a calendar icon and the date '2/5/2018'. A 'User Information' section contains several fields: 'User Id' (richard), 'First Name' (Richard), 'Last Name' (Ross), 'E-Mail Address' (ross@mycompany.com), 'Manager' (tom), and 'Roles' (Designer). Below this is a table with columns 'Description', 'Units', 'Unit Cost', and 'SubTotal'. The table contains three rows: 'Sweater' (2 units, 15.00 unit cost, 30.00 subtotal), 'T-shirt' (3 units, 5.00 unit cost, 15.00 subtotal), and 'Jacket' (1 unit, 50.00 unit cost, 50.00 subtotal). At the bottom left is a 'Grand Total' field showing '95.00'. At the bottom right is a reCAPTCHA logo with the text 'protected by reCAPTCHA' and 'Privacy Terms'.

- Live Forms does not control the reCAPTCHA logo nor its placement.
- In some share link embedding scenarios, the logo may not show even though reCAPTCHA is active.

The frevo Cloud uses a custom reCAPTCHA key that is configured for **Domain Name Validation** providing maximum security. To implement the maximum possible protection from form spamming in your in-house environment, follow the steps listed in [Administration of reCAPTCHA Keys](#).

Save/Load

If you check this checkbox, a **Save** button will be displayed at the bottom of your form.

This feature is useful for lengthy forms where your users may not have all the information required to complete the form in a single session. By clicking on the Save button a copy of the form with all the current values is saved on the Live Forms form server. Later the user can re-open the form from their task list; see [Perform a task](#) for more information. The form will populate the fields with the saved values.

You can save your partially filled in forms as many times as you want.

Currently the **Save button label** for forms cannot be customized like it can for [flows](#). The ability to change this may be available in a future release.

Refer to the [Save and Load](#) feature for full details.

Show in History

If this checkbox is unchecked, tasks for the form or flow will not appear in [Tasks history searches](#). If you want them to appear, make sure this box is checked. Checking or Un-checking it affects all tasks including ones that were created prior to the action.

Force Auth

If this is checked and the Live Forms tenant supports SSO (single sign on) such as the LDAP Security Manager enabled tenants, then the Live Forms authentication mechanism will be in effect even when a user is already authenticated via SSO.

For example, if you leave force auth unchecked and your form is public in tenant, and you are already authenticated via SSO you will not have to login directly to Live Forms to use the form. If instead you check force auth Live Forms will force you to login directly even though you are already authenticated via SSO.

See [Working with LDAP and Single Sign On](#) for more details.

This property is currently ineffective for tenants with the default delegating security manager. However the delegating security manager may support SSO in the future.

Accessible

Live Forms can be used to build accessible forms/flows that meet Section 508 and WCAG 2.0 accessibility standards. Check the Accessible property to turn on this feature. Refer to this [documentation](#) for the details.

Decorated

Decorated is checked by default when you create a new form. If you uncheck Decorated at the form level, newly added controls will have their control level decorator property unset -- meaning no decorator. It will NOT remove the decorator from all controls already in the form. The decorated property can also be set at the [flow level](#). The designer can select a decorator for each of the steps in a flow that will display on the navigation bar.