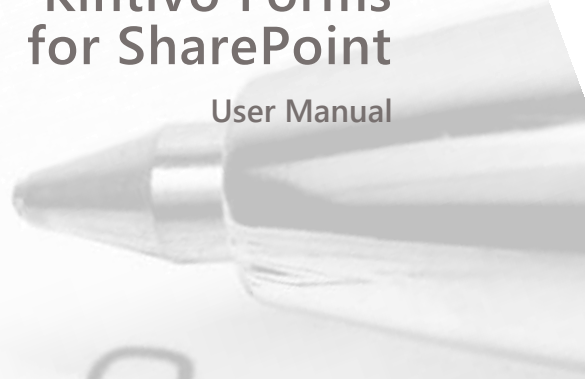


Kintivo Forms for SharePoint

User Manual



Contents

User Manual.....	2
For End Users	2
Web Part Edit Panel.....	3
Form Builder Tabs	4
List Tab	4
Fields & Widgets	6
Widgets.....	10
Submit & Cancel Widgets.....	10
Submit Button Widget	10
Cancel Button Widget	12
Attachment Widget.....	13
Display Attachment Widget.....	13
Spacer Widget	13
Captcha Widget	14
URL Data Widget.....	15
System Field Widget	16
Embed Code Widget.....	16
Embed Content Widget.....	17
Google Maps Widget	17
Geolocation Widget	17
Signature Widget	18
Security & Data Encryption	19
Using a Proxy Server (Advanced).....	19
Security Context.....	19
Data Encryption	19
Analytics.....	20
Run Workflow Asynchronously (Improve Performance).....	21
Dynamic Display Conditions (Conditional Logic / Dynamic Fields)	22
Auto Suggestion Settings	23
Integration with Kintivo Membership Manager.....	23
Display Tab.....	23



Email Tab	26
Publish Your Form.....	27
For Administrators	28
Import/Export Smart Forms	30
Look & Feel.....	31

User Manual

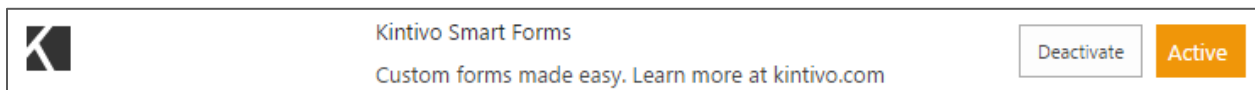
First of all, congratulations on being a person of high standards and fine tastes! Kintivo Forms is loaded with features which provide you with a super easy to use, yet very powerful SharePoint form building solution. *Now let's build some forms!*

-Add the Web Part to the SharePoint page.

-Point the Web Part to a SharePoint List.

-Pick the fields you want and click OK.

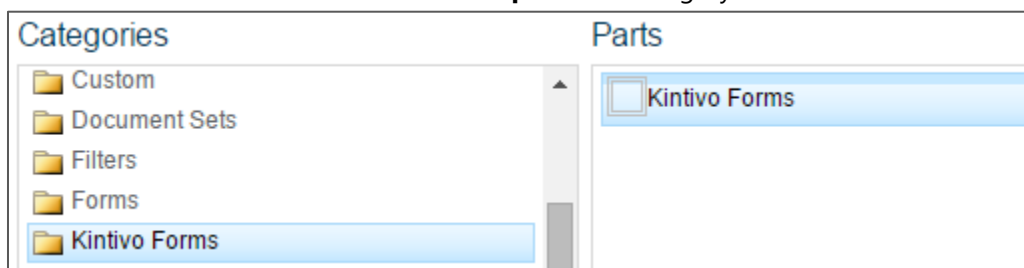
NOTE: Please ensure your Administrator has activated the "Kintivo Smart Forms" Feature on the site you wish to use. Instructions for activation are in this document.



For End Users

The Kintivo Form Web Part allows you to quickly add new forms to SharePoint pages, here's how:

1. Add the "**Kintivo Forms**" Web Part to the desired page.
It can be found in the "**Kintivo Smart Components**" category:



- Now that the Web Part is on the page, you can tell it which SharePoint List to submit to, which fields you want and many other options by clicking “Edit Web Part” located in its dropdown:

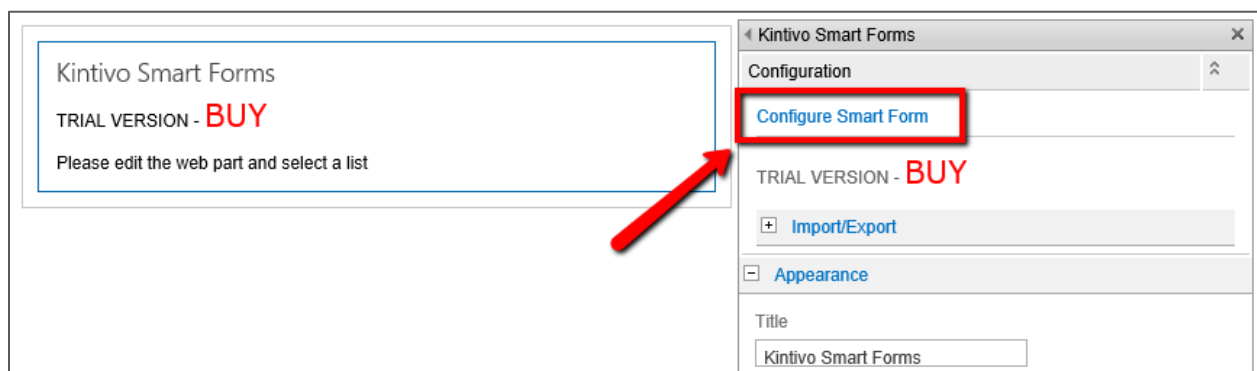


- Once the Web Part edit panel is open, specify which List to submit to, which fields you want, button types, Landing Page or Thank You Text, and many more options.

All of these options are visually described below.

Note: Be sure the SharePoint List you want to submit data to already exists. If the List *doesn't* already exist, go create it and return to this step.

Web Part Edit Panel



Clicking the “Configure Smart Form” link in the web part edit panel will pop-up the Form Builder Tabs.



Form Builder Tabs

LIST TAB

Use the List Tab to select the list you wish the form to post data to. The list may reside anywhere within the current Web Application and is not required to reside in the same site as your form. First, select the Site Collection, then the Site, then “Select Target List”.

The screenshot shows the 'List' tab selected in a sequence of five tabs: List, Fields, Display, Email, and Miscellaneous. Below the tabs are four configuration steps:

- STEP 1**: Select Site Collection:
- STEP 2**: Select Site:
- STEP 3**: Select Target List:
- MODE**: Form Mode:

Form Modes:

Add New Item (Mode) – forms for posting NEW items to a SharePoint List.

Update Existing Item (Mode) – pre-populated forms for UPDATING existing items in a SharePoint List. When using the update mode, be sure to fill in the “Url Parameter Name” field or the Cookie Parameter Name field. The web part will need to know where to get the Item ID value from. It will always look in the URL for this value, but needs to know what to look for. The “Url Parameter Name” field (sometimes called Query String Parameter Name) is used for just that. You can optionally tell the web part which Item ID to update using a cookie value (Cookie Parameter Name).



The below sample setting tells the web part to look for a cookie titled "SF_IF" or in the URL for a parameter called "**SF_ID**".

MODE	Form Mode <input type="text" value="Update Existing Item"/>
	URL Parameter Name: ⓘ <input type="text" value="SF_ID"/>
	Cookie Parameter Name: ⓘ <input type="text" value="SF_ID"/>

In the above example, if a cookie titled "SF_ID" does not exist, the web part will use the value of the "SF_ID" URL parameter to populate the form.

For example, the following URL: "http://YourSite.com/pages/UpdatePage3.aspx?**SF_ID=725**"

...would tell the web part to pre-populate the form with the List Item which has the ID of "725".

Cookie Parameter Name

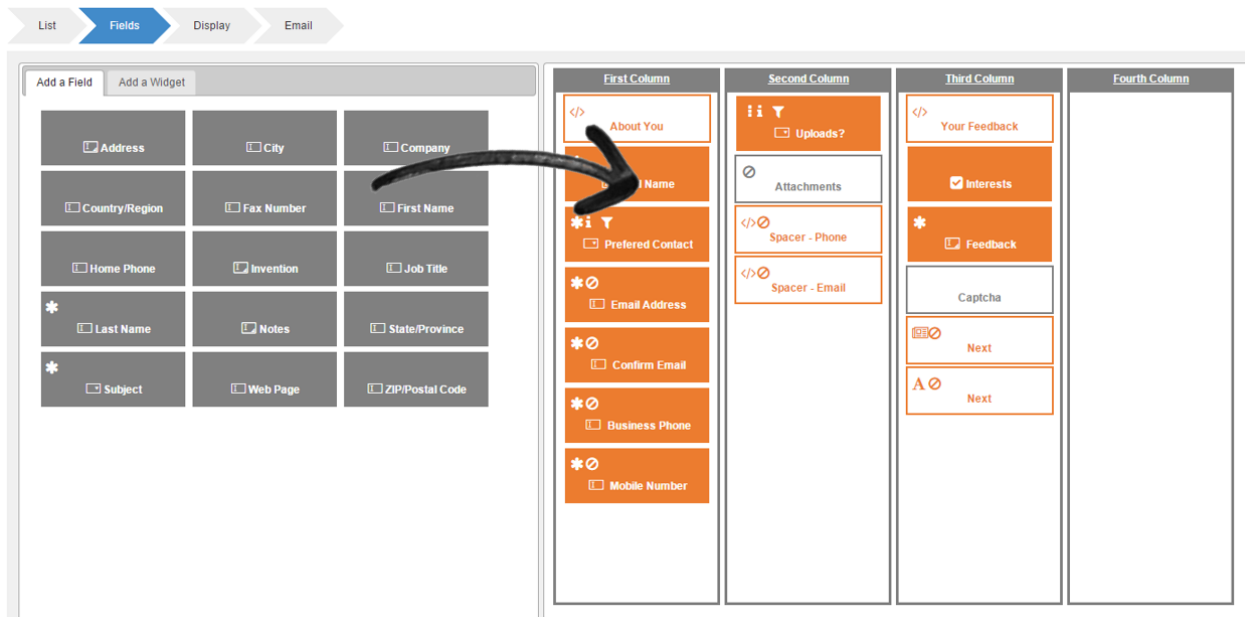
You may use cookie values to tell the form which List Item ID you want to update, just make sure the cookie exists and has the correct name and value assigned to it.

Tip: *There are many ways to populate the URL with the List Item ID you wish to use, including using the Smart Forms Web Part itself! For example, you may have the need to use multiple forms and multiple pages to satisfy your specific form based solution (think "wizard" based interfaces). To do this, you would start with a form in "Add New Item" mode, and specify the "Landing Page" as your "Step 2" page. You would also tell the first form (the one in "Add New Item" mode) to pass the "ID" to the Landing Page (this is a setting in the "Submit Options / Submit URL Fields" section). When you do this, the web part will automatically append the URL Parameter titled "**SF_ID**" to the specified Landing Page URL, and set the value of the "SF_ID" equal to the ID of the new Item being created. Your "Step 2" page would have the Smart Forms Web Part set to "Update Existing Item" mode, and you would fill in the "Url Parameter Name" with "SF_ID". **Note:** When passing the ID to your Landing Page, the Smart Forms Web Part will pass it using the URL Parameter Name = "SF_ID".*



Fields & Widgets

The Fields Tab is used to specify the fields and widgets to be displayed on your form. Fields come from the SharePoint list specified on the list tab. Drag n' drop fields and widgets onto your form as you see fit.



Mouse over the fields' little icons to view what it's telling you about the field. It might be a required field, it might be telling you the field is hidden, has a description, a default value, or has a show/hide condition.



Required Fields: Required fields are designated with an asterisk (*) on the resulting form. To make a field required, simply set the respective SharePoint List Column to required. You do not have to display a field on your form just because it is set to required within the respective SharePoint List. However, when you display a field that happens to be required within the SharePoint List, it will also be required on your form.

Field Validation: The Smart Forms Web Part provides field validation based on the List Column settings you are using. For example, if your list has a required field, that field will also be required on your form. If your list has a date/time field, the field will automatically be represented on your form as a date/time picker. The same is true for all SharePoint List Column types (text, yes/no, dropdowns, radio buttons, checkboxes, etc...).

More sophisticated field validation may also be used such as comparing fields (example: Email Address field needs to match the Confirm Email field). This type of validation is handled using regular expressions on your SharePoint List. If you are already using regular expressions on the Lists, rest assured the Smart



Forms Web Part will honor your settings. List validation settings can be found by navigating to your List, and then: List Settings / Validation Settings (located under the General Settings section).

This SharePoint List Validation setting would cause the Smart Forms Web Part to check on form submission that the “Email Address” field data is equal to the “Confirm Email” field data entered by the user. If they are not the same, the Smart Forms Web Part will display the specified User Message (above) to the user, and it will not submit the data to your list until the validation is satisfied.

Edit field settings by clicking the edit pencil icon.

Field Label (to show on form) – whatever you type in here will display on your form as the field label. The default label is the List Column name.

Description – if you flipped the “Display field descriptions” toggle (lower left of “Fields” tab), the field description will also appear on your form below your fields (if your fields have descriptions).



The screenshot shows the 'Fields' configuration tab. At the bottom, there is a checkbox labeled 'Display field descriptions' which is currently turned 'ON'. A red arrow points to this checkbox. The main area contains a grid of field options such as Address, City, Company, Country/Region, Fax Number, First Name, Home Phone, Invention, Job Title, Last Name, Notes, State/Province, Subject, Web Page, and ZIP/Postal Code. On the right, a preview of the 'First Column' shows a 'Description' box with the text 'About You' and several other fields like 'Full Name', 'Preferred Contact', 'Email Address', 'Confirm Email', 'Business Phone', and 'Mobile Number'.

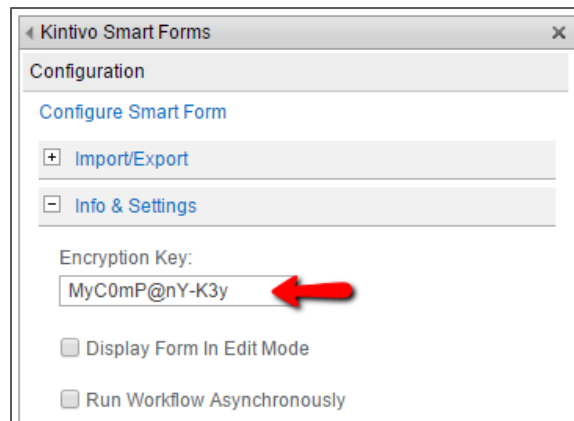
When ON, your form will display the List Column descriptions from your SharePoint List by default. You can overwrite the default value by adding your own field description to the “Description” box.

Default Display (dropdown) – the “Show” option (default) makes the field visible on your form. The “Hide” option will hide the field when the form first loads. You may cause a hidden field to appear based on the value selected during the form filling process. See “Dynamic Display Conditions”.

Encrypt Field Value (checkbox) – this option causes the value to be encrypted prior to saving to the SharePoint list. The data will be encrypted and non-usable when viewing from the standard SharePoint List View, or from within the backend database for that matter. This is useful for satisfying compliance requirements such as HIPAA and others, including password storage.

Important Note on Encryption: You should supply your own unique and secret encryption key. Your key may be input into the web part from the web part properties dialog box (see below image). You can make up your own encryption key, or follow your company policy on the matter, but either way, do NOT lose it. The web part can NOT properly encrypt/decrypt values without your key. We can NOT help you if you lose your key. Do not change your encryption key once you have started encrypting values via the form.





See “Security & Data Encryption” for more details.

Required (checkbox) – this option forces the field to be entered prior to form submission. Enter a friendly message to be displayed should the user fail to supply a value for this required field into the “Required Error Message” box.

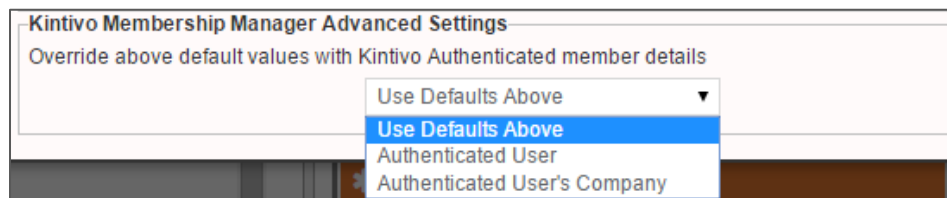
Read Only (checkbox) – the “Read Only” checkbox makes the field non-editable yet still displays the field on your form.

Default Value Settings – prepopulate your form field by specifying:

- URL Value – provide the URL parameter name that will contain the default value for this field.
- Default Value – type in the desired Default Value for this field.

If the SharePoint List Column has a default value, it will be used unless you are using one of the above two options.

Kintivo Membership Manager Advanced Settings (dropdown) – when used with other Kintivo products such as Kintivo Smart Login or Kintivo Membership Manager, you may control the default values based on the user that is currently logged in and accessing the form.

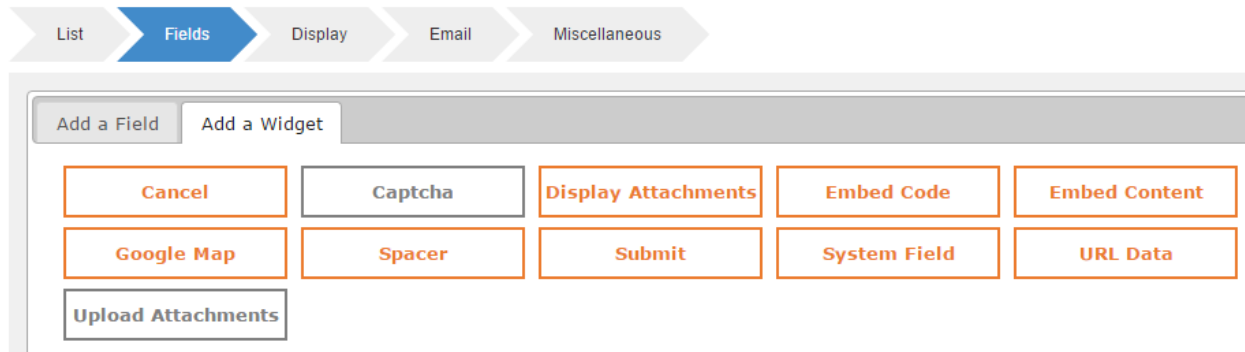


WIDGETS

Widgets are small applications with limited functionality that can be added to your form. A widget occupies a portion of your form and does something useful.

You can drag 'n drop widgets onto your form from the Fields / Add a Widget tab.

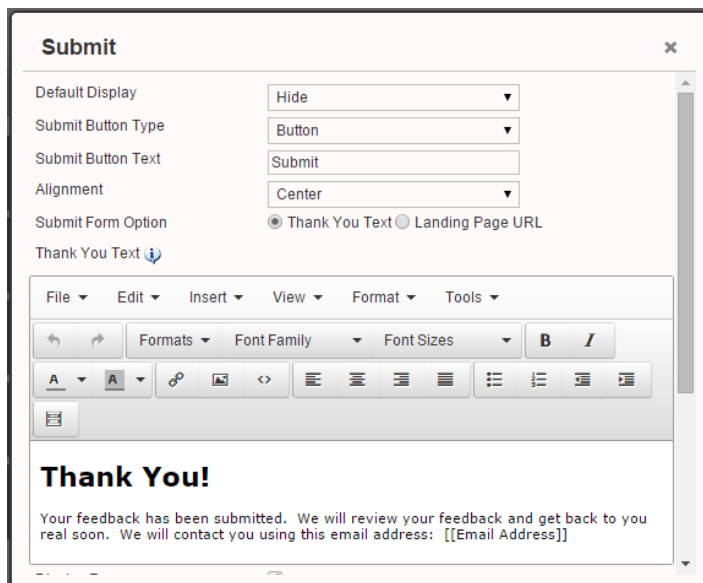
Note: You may use multiple instances of most widgets on your form. The widgets that can only be used once per form are gray (Attachment, Captcha).



SUBMIT & CANCEL WIDGETS

These widgets are used to control your forms submit and cancel buttons.

SUBMIT BUTTON WIDGET

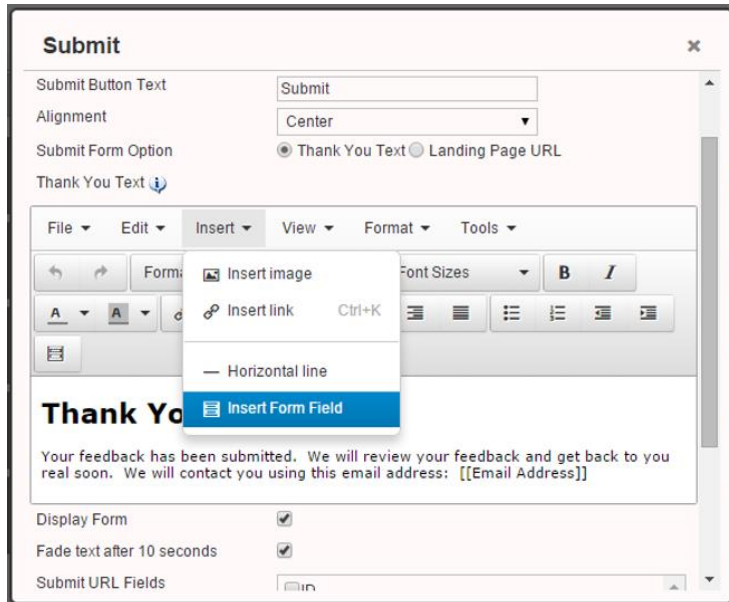


- **Default Display** - control if it should show or hide the button when the form page first loads.
- **Submit Button Type** – submit button, text or image.
- **Submit Button/Text/Image URL** – text to display for submit button or submit link (text).
- **Alignment** – position within the column to align button.



- **Submit Form Option:**

Thank you text – Submit Behavior: submits form data to list, resets to blank form and displays this text. You may use form field values within your Thank you text:



Insert Form Field(s)		
Full Name	Best Contact Method	Email Address
Confirm Email	Business Phone	Mobile Number
Uploads?	Interests	Feedback

- **Display Form** – clear and display the form after submit so the user may fill/submit again.
- **Fade text after 10 seconds** – only display the Thank You text for 10 seconds, then fade it away.
- **Landing Page URL:** Submit Behavior: submits form data to list and redirects user to this URL.
- **Submit URL Fields:** Submit Behavior: Submit data to list. Passes these values in the query string to your Landing Page URL (*Tip:* be sure to pass the ID if your landing page is part of a multi-part-form solution).



CANCEL BUTTON WIDGET

- **Default Display** - control if it should show or hide the button when the form page first loads.
- **Cancel Button Type** – button, text, image or don't display cancel button.
- **Cancel Button/Text/Image URL** – text to display for cancel button or cancel link (text).
- **Alignment** – position within the column to align button.
- **Landing Page URL**: Cancel Behavior: does not submit form data to list, redirects user to this URL.
- **Cancel URL Fields**: Cancel Behavior: does not submit data to list. Passes these values in the query string to your Landing Page URL (*Tip*: be sure to pass the ID if your landing page is part of a multi-part-form solution).



ATTACHMENT WIDGET

If the SharePoint List allows attachments, you can allow users to attach multiple files to a single form submission by adding the Attachment Widget to your form.

The screenshot shows a 'Feedback' form with several input fields: 'Your Name *', 'Email Address *', 'Confirm Email *', and 'Business Phone'. To the right, there is a 'More Info' section with 'Affiliation *' (checkboxes for Partner, Vendor, Customer, Employee, Concerned Party), 'Related Department' (dropdown menu), and 'Priority' (radio buttons for Low, Medium, High). At the bottom, there is an 'Attachment' widget consisting of a text input field and a 'Browse...' button, which is highlighted with a red rectangular box. Below the attachment widget are 'CANCEL' and 'SUBMIT' buttons.

DISPLAY ATTACHMENT WIDGET

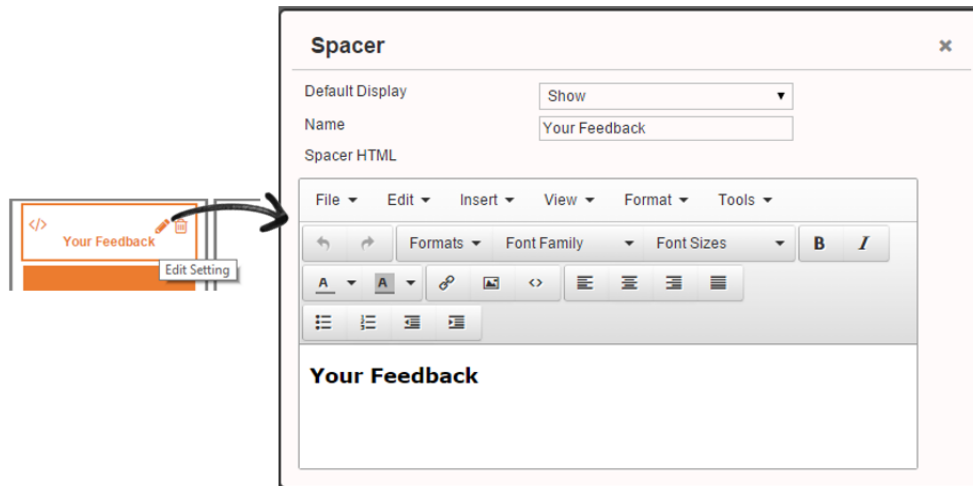
Display existing item attachments on forms that are in Edit Mode by adding the Display Attachment Widget to your form.

SPACER WIDGET

The spacer widget allows you to add text, images and HTML to your form. Drag 'n drop as many spacer widgets as you need to get your form looking just right. Use the Spacer widget to separate sections of your form.

The screenshot shows a form titled 'Share your feedback with us.' divided into two main sections: 'About You' and 'Your Feedback'. The 'About You' section includes fields for 'Full Name *', 'Preferred Contact *' (with a dropdown menu), 'Business Phone *', 'Mobile Number *', and 'Uploads?' (with a dropdown menu). The 'Your Feedback' section includes a list of 'Interests' (checkboxes for Forms, Data Standards, Framework, Tools, Maintenance Requests & Process) and a large text area. A 'Spacer Widget' is highlighted with a red box and a red arrow points to it from the 'About You' section. Another red arrow points from the 'Spacer Widget' to a promotional banner at the bottom left that says 'Cool, we will use a phone to contact you.' with an image of a person on a phone. A third red arrow points from the 'Spacer Widget' to a 'NEXT' button at the bottom right. There is also a checkbox for 'I'm not a robot' and a 'RECAPTCHA' logo.





Click the "edit pencil" icon on the Spacer to access its pop-up dialog.

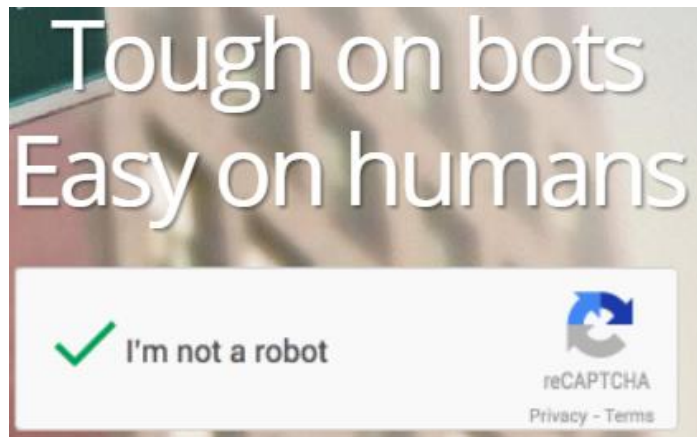
- **Default Display** - control if it should show or hide the Spacer Widget when the form page first loads.
- **Name** - name given to your Spacer to help you keep them sorted out, does not display on form.
- **Spacer HTML** – text or html to be displayed on your form.

CAPTCHA WIDGET

You can ensure data being entered into your form is from a real human (and not a spam-bot) by optionally allowing Captcha Control Validation.

The Smart Forms Web Part uses ReCaptcha: <http://www.google.com/recaptcha> - ReCaptcha is a free anti-bot service that helps digitize books.

If you check the box "Allow Captcha Control Validation" – you will also need to supply your ReCaptcha keys (public and private). You can very quickly get these free keys from: <http://www.google.com/recaptcha>



Note: If your SharePoint environment is using a proxy server, it's imported to have your SharePoint Administrator follow the steps outlined within the "Using a Proxy Server" sub-section of "Security & Data Encryption".



Once you have your keys, paste them into the appropriate boxes.

Captcha ✕


Default Display

Captcha Public Key (Site key)

Captcha Private Key (Secret key)

Captcha Validation Message

Get your free keys from Google: <http://www.google.com/recaptcha>

I'm not a robot 
reCAPTCHA
[Privacy](#) - [Terms](#)

URL DATA WIDGET

The URL Data Widget allows you to display data on your form that comes from a URL parameter. Specify the name of the URL parameter in the "URL Parameter" box and the widget will display the value of that parameter.

Display URL Data ✕

Default Display

Label Text

URL Parameter

Hide if URL string missing

Default Text



SYSTEM FIELD WIDGET

The System Field Widget displays system fields from your SharePoint List on your forms (Modified, Modified By, Created, Created By, and Version).

System Field		Save & Close
Name	<input type="text" value="Last Modified By"/>	
Field	<input style="border-bottom: 1px solid black;" type="text" value="Modified By"/>	

EMBED CODE WIDGET

The Embed Code Widget allows you to paste in existing embed code generated from sites like YouTube, or even your own JS scripts.

Embed Code		Save & Close
Default Display	<input style="border-bottom: 1px solid black;" type="text" value="Show"/>	
Name	<input type="text" value="EmbedCode1"/>	
Embed Code	<div style="border: 1px solid #ccc; padding: 5px;"><div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"><></div><pre><iframe width="640" height="360" src="https://www.youtube.com/embed/6YqcjhwGLHk?rel=0" frameborder="0" allowfullscreen></iframe></pre></div>	







EMBED CONTENT WIDGET

The Embed Content Widget allows you to inject HTML5 content into your forms. Similar to how the native Content Editor Web Part works, you can target a pre-existing file (URL) and it will render inside the form when the form page loads.

Embed Content		Save & Close
Default Display	<input type="text" value="Show"/>	
Name	<input type="text" value="EmbedContent1"/>	
Content file URL	<input type="text" value="/Assets/MyFile.txt"/>	

GOOGLE MAPS WIDGET

The Google Maps Widget will display a Google Map on your form with a pre-populated address pin. The address/pin may be populated dynamically from the item being displayed on your form. Supply the “Location Field” dropdown with the column that contains the full address. **TIP:** If your list does not already have a column that contains the full address, it’s easy to automate this by adding a calculated column to your list. The calculated column should concatenate the address fields together to form a single address value (Ex: Street, City, State, Postal Code).



Google Map		Save & Close
Name	<input type="text" value="Map"/>	
Location Field	<input type="text" value="Address"/>	
Google API Key 	<input type="text"/>	Google Maps Usage Limit
Default Zoom Level 	<input type="text" value="8"/>	
Google Map Height (px) 	<input type="text" value="300px"/>	
Google Map Width (px or %) 	<input type="text" value="100%"/>	

GEOLOCATION WIDGET

Capture the location of the person filling out the form. Specify the SharePoint list column you wish to store the coordinates (latitude, longitude).

Note: The form may prompt the user to “Allow Location Sharing”.



Geo Location		Save & Close
Default Display	<input type="text" value="Hide"/>	
Name	<input type="text" value="Geo Location"/>	
Location Field	<input type="text" value="Location"/>	
Google Map Height (px) 	<input type="text" value="300"/>	
Google Map Width (px) 	<input type="text" value="400"/>	



Specify the desired list column for storing the coordinates (“Location Field”).

Optionally show or hide a map of users location on the form (“Default Display”).

If showing the map, specify map size dimensions (“Google Map Height”, “Google Map Width”).

SIGNATURE WIDGET

Hand written signatures may be captured on your forms using the Signature Widget. These signatures are stored in different ways based on the version of SharePoint.

Signature	
	
	<input type="button" value="NEXT"/>

SharePoint 2013 – Signatures are stored in the desired (user specified) column. The column must be of type Multiple Lines of Text (MLOT). The format of the signature markup is of type HTML 5 (SVG tags).

SharePoint 2010 – Signatures are stored as an attachment (.aspx file) to the list item. This is because SP 2010 does not natively support HTML 5 within Multiple Lines of Text (MLOT) columns.



Security & Data Encryption

USING A PROXY SERVER (ADVANCED)

The following steps may be required by your SharePoint Administrator when your SharePoint environment is using a proxy server:

Add the following three app settings entries into the Web.Config file:

- Proxy Server URL (with port) e.g. `<add key="KFormProxyServerAddress" value="http://PROXY_SERVER:PROXY:PORT"/>`
- Proxy Credentials UserName e.g. `<add key="KFormProxyServerUserName" value="DOMAIN\USERNAME"/>`
- Proxy Credentials Password e.g. `<add key="KFormProxyServerPassword" value="PASSWORD"/>`

If you specify the proxy server URL within your Web.Config file under app settings, Kintivo Forms will use the proxy server URL while making the Captcha validation call.

If you specify the proxy credentials within your Web.Config file under app settings, Kintivo Forms will use the specified credentials along with proxy URL so that the secured proxy server can be used.

SECURITY CONTEXT

The form will by default run under the system account. This is recommended as it allows you to lock down your SharePoint List and yet allow the form to post to it.

You may optionally run the form under the context of the current user. Use this option when you are positive that everyone filling out the form has permissions to the SharePoint List you are posting to.

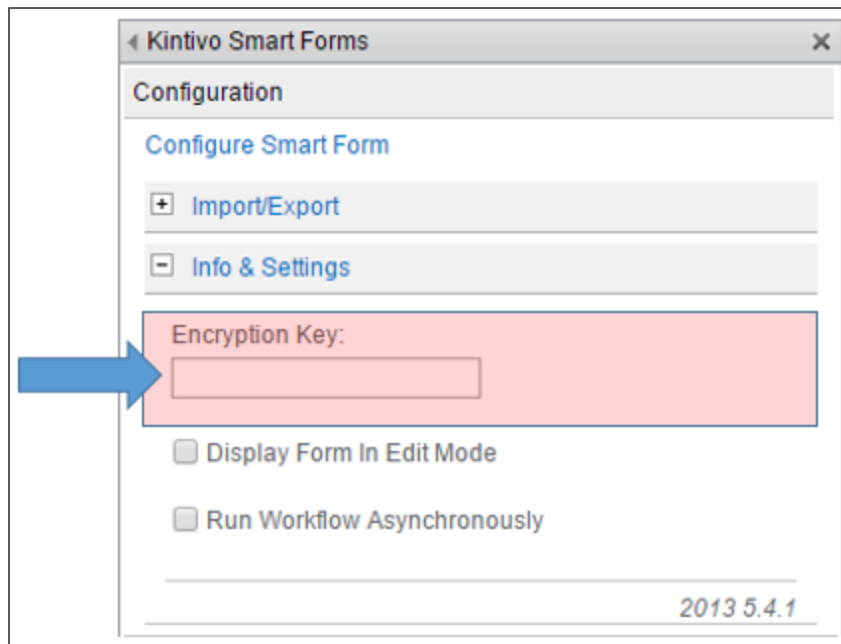
The screenshot shows the configuration interface for Kintivo Forms. At the top, there are tabs for 'List', 'Fields', 'Display', 'Email', and 'Miscellaneous'. The 'Miscellaneous' tab is selected and highlighted in blue. Below the tabs, there are several configuration fields: 'Record IP Address to:', 'Record User Agent to:', 'OnLoad Script Function:', and 'Pre-Submit Script Function:'. Each of these fields has a dropdown menu with the text '--- Select a Field ---'. A red arrow points from the 'Miscellaneous' tab to the 'Security Context (Advanced)' section below. This section contains two radio button options: 'System Account (Recommended) - Default security context used by the form to post to the SharePoint List. Allows you to lock down your SharePoint List and yet allow this form to post to it.' and 'Current User (Advanced) - Use this option when you are positive that everyone filling out the form has permissions to the SharePoint List you are posting to.'

DATA ENCRYPTION

Encrypt form field data before it even reaches your SharePoint List. The only way to read the encrypted value is Kintivo Forms.

Under "Info & Settings" of the web part properties dialog, provide your own "Encryption Key" to be used by the web part for encrypting and decrypting your data. This can be any alphanumeric string containing special characters – don't lose it (only you can decrypt your data).





After providing your Encryption Key, you may enable Encryption by checking the “Encrypt Field Value” within the field edit dialog.

The screenshot shows the 'Field Edit Dialog' for a field titled 'Security Phrase'. The dialog has a 'Title' field and a 'Save & Close' button. The 'Field Label (to show on form)' is 'Security Phrase', with a 'Reset' button next to it. The 'Description' field is empty. The 'Default Display' is set to 'Hide'. The 'Encrypt Field Value' checkbox is checked. The 'Required' checkbox is also checked. The 'Required Error Message' is 'You must provide a security phrase.'. The 'Read Only' checkbox is unchecked. The 'Default Value Setting' section includes 'URL Value' and 'Default Value' fields. The 'Kintivo Membership Manager Advanced Settings' section includes an 'Override above default values with Kintivo Authenticated member details' checkbox and a 'Use Defaults Above' dropdown.

Analytics



Optionally capture and retain important analytics related to the form submission such as the IP Address of the person submitting the form and User Agent (browser) information. SharePoint already tracks the Date/Time, so all you need to do is specify the columns you wish to store the IP Address and User Agent details captured during form submission.

The screenshot shows a navigation bar with five tabs: 'List', 'Fields', 'Display', 'Email', and 'Miscellaneous'. The 'Miscellaneous' tab is selected and highlighted in blue. Below the tabs, there are two configuration rows. The first row is 'Record IP Address to:' with a dropdown menu showing 'IP Address'. The second row is 'Record User Agent to:' with a dropdown menu showing 'User Agent'. Two green arrows point to the right from the dropdown menus, indicating the selection of the respective columns.

Specify where to store the IP Address and User Agent details from the “Miscellaneous” tab. The dropdowns represent columns from the list specified on the “List” tab. You may want to create new columns for storing this information. In the above picture, the list has a column called “IP Address” and another column call “User Agent”. The column name does not matter, but for usability purposes it is wise to name them in a manner that makes sense to someone viewing the list item.

Once the columns are specified on the “Miscellaneous” tab, the IP Address and User Agent information will be captured during form submission and posted to the specified columns:

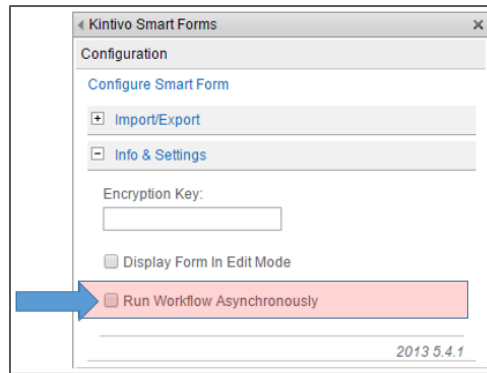
User Agent	Mozilla/5.0 (Windows NT 10.0; WOW64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/49.0.2623.87 Safari/537.36
IP Address	66.229.16.184
Created at 3/14/2016 9:52 AM by	<input type="checkbox"/> [Redacted]
Last modified at 3/14/2016 9:52 AM by	<input type="checkbox"/> [Redacted]

Run Workflow Asynchronously (Improve Performance)

If your form is submitting to a list that has one or more workflows, you may run workflow asynchronously. When running workflow asynchronously, workflow(s) may run in parallel to the form submission process and these workflows often take much longer to process than the form submission. This will allow the form to post data without waiting for the workflow(s) to complete. This can improve the end user experience when a form is submitted by decreasing the wait time.

Under “Info & Settings” of the web part properties dialog, check the box titled “Run Workflow Asynchronously”.





Dynamic Display Conditions (Conditional Logic / Dynamic Fields)

It is often helpful to only show form fields when the person filling out the form answered a question in a certain way. For example, if the person says the best way to contact them is by phone, you might want to display the “Business Number” and “Mobile Number” fields. If they say the best way to contact them is by email, you might want to hide the phone fields and only display the “Email Address” fields.

Dynamic Display Conditions can be applied to **dropdown fields**. You can show or hide parts of your form based on the answer. This includes any number of fields or widgets that are already on your form.

If answer is	then	this field or widget
Phone	Show	Business Phone
Phone	Show	Mobile Number [-] Remove
Phone	Hide	Email Address [-] Remove
Phone	Hide	Confirm Email [-] Remove
Email	Show	Email Address [-] Remove
Email	Show	Confirm Email [-] Remove
Email	Hide	Business Phone [-] Remove
Email	Hide	Mobile Number [-] Remove
Phone	Show	Spacer - Phone [-] Remove
Phone	Hide	Spacer - Email [-] Remove
Email	Show	Spacer - Email [-] Remove
Email	Hide	Spacer - Phone [-] Remove

[+] Add another

In the below example, if the person filling out the form selects “Yes” in the “Uploads?” dropdown field, the form will display the “Attachments Widget” for them to use.



Uploads?

Field Label (to show on form) Uploads? Reset

Description Do you have any files to upload?

Default Display Show

Required

Read Only

Default Value Setting

URL Value

Default Value --- Select Default Value ---

Use default value: No

Dynamic Display Condition(s)

Enable

Show or hide parts of your form based in answer.

If answer is	then	this field or widget
No	Hide	Attachments
Yes	Show	Attachments [-] Remove

[+] Add another

Note: Dynamic Display Conditions may be enabled on any dropdown field.

Auto Suggestion Settings

Auto Suggestions are available on Lookup fields. They are also available on People Picker fields if you are using Kintivo Smart Login product. Auto Suggestions allow the person filling out the form to start typing and it will auto-suggest based on existing values in your lookup/people picker.

Suggestions Settings

Provide Suggestions Yes No

Default Display Text

Show Add New Item

Add New Item Url (Leave blank for List Default)

Add New Item Display Text

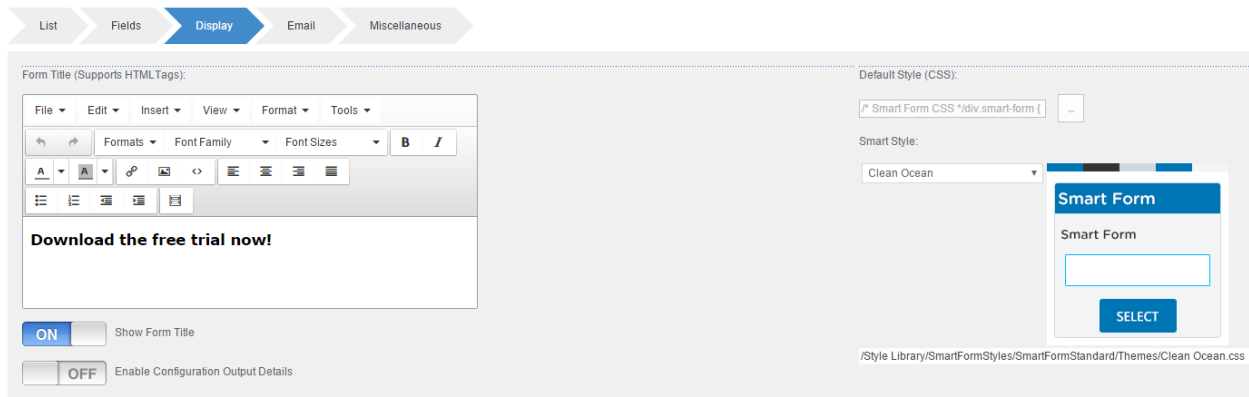
Integration with Kintivo Membership Manager

When using our Membership Manager product to organize, track and maintain people, companies and roles, this integration allows your forms to default lookup and people picker fields to current user or current user's company.

Display Tab



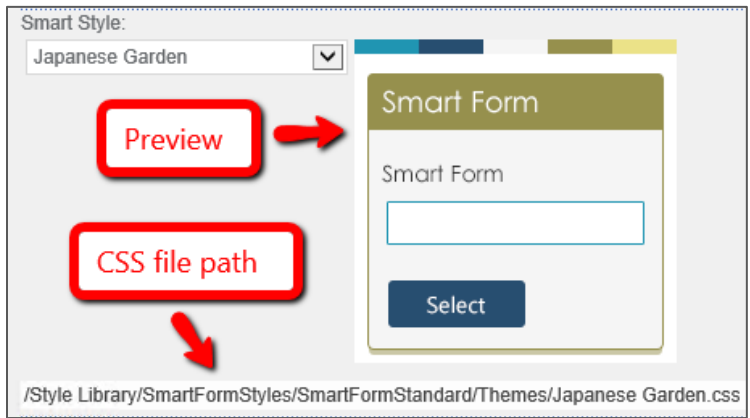
Use the Display Tab to control the look and feel of your form. Select from one of the professionally designed mobile friendly “Smart Style” options or take full control with your own CSS file.



Form Title (Supports HTML Tags) – similar to normal web part titles found in the appearance section of most web parts, but this one allows HTML to be used within the title and you have more control over the display via CSS and Smart Styles.

Default Style (CSS) – CSS used to control the form appearance.

Smart Style – choose from one of our professionally designed form Smart Styles or go cowboy with your own CSS file.





Select “Custom” to use your own CSS to control the form appearance.



Default Style (CSS):

Smart Style:



(e.g. http://{site}/{subsite}/_catalogs/masterpage/css/MyCustomCSS.css) 

Enable Configuration Output Details – ONLY used by our Support Team

Read more about customizing the look and feel of your forms in the “For Administrators” section of this document.



Email Tab

Sometimes it's helpful to send emails when a form is submitted. Use the Email Tab to configure your optional email.

The screenshot shows the 'Email' tab in the configuration interface. At the top, there are navigation tabs: 'List', 'Fields', 'Display', and 'Email' (which is highlighted). Below the tabs, there is a toggle switch for 'Send Email' which is currently turned 'ON'. The configuration fields include:

- To:** [[Email Address]]
- CC:** (empty)
- BCC:** bsmith@email.com
- Subject:** Your Feedback

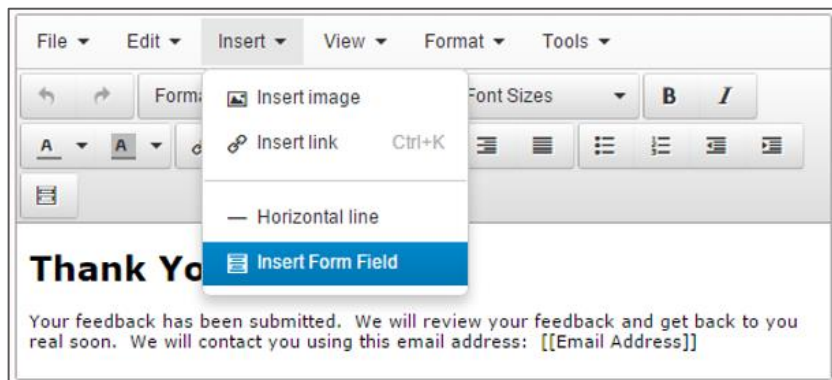
Below these fields is a rich text editor with a menu bar (File, Edit, Insert, View, Format, Tools) and various formatting options. The message content is:

Message: [[Full Name]],
Thank you for your feedback.
You said: [[Feedback]]
We will get back to you real soon.

Email Variables:

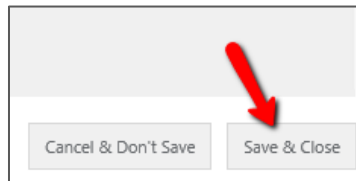
Form fields may be embed into your emails, including the To, CC, BCC and Subject lines. To embed form fields, use the Insert dropdown and select "Insert Form Field".

Double brackets "[[Field Name]]" are placed around field names to reference form data within your email. Form field names ARE case sensitive, so we recommend using the "Insert Form Field" option to avoid typos.

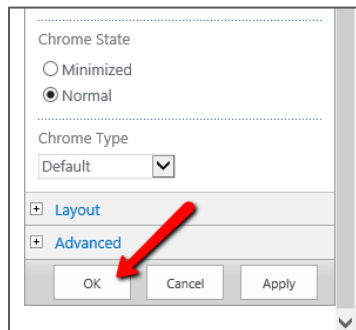


Publish Your Form

1. Click the "Save & Close" button from the **Form Builder Tabs**:



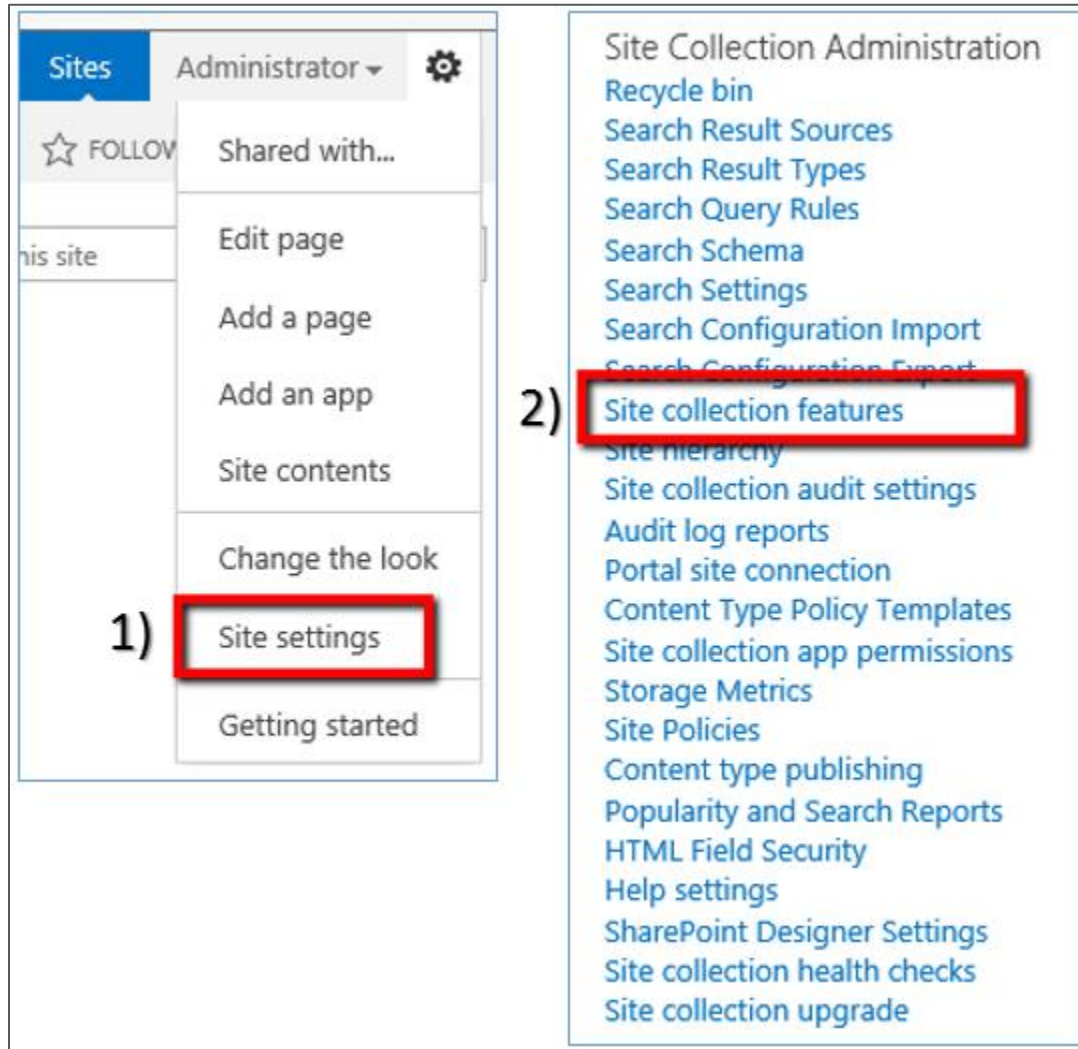
2. Click the "OK" button (if open still) on the **Web Part Edit Panel**: (remember to save your page)



For Administrators

Please ensure the Smart Forms Web Part installation has occurred, **and has been activated on the site you wish to use.**

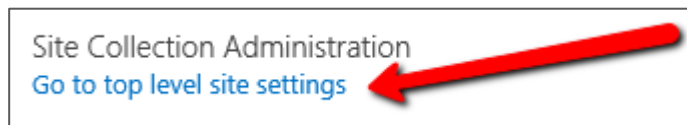
- A) Go to the site you wish to use.
- B) Ensure the following Feature has been activated: "Kintivo Smart Forms"
Go to: Site Actions / Site Settings / Site collection features



Note: If you go to Site Settings and don't see the Site Collection Administration Section as above #3, it's one of two things:

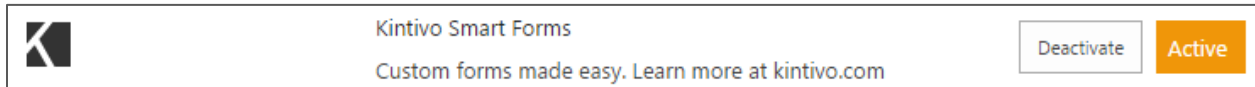
1. You are not at the Top Level Site Collection – Go to the Top Level Site Collection from the Site Settings page by clicking on "Go to top level site settings."





2. You are not signed-in as a Site Collection Administrator – Sign Out, sign back in as a Site Collection Administrator.

From the Site collection features page, scroll down to the “Kintivo Smart Forms” feature and ensure it says “Active” (see below).



Note: If the “Kintivo Smart Forms” Feature is not listed on the “Site collection features” page:

1. Make sure you are not accidentally on the “Site features” page, which is not the same as the “Site collection features” page. You need to be a Site Collection Administrator to see the “Site collection features” page.
2. Ensure the solution has been deployed to the correct Web Application from your Central Administration site (see Installation Instructions).

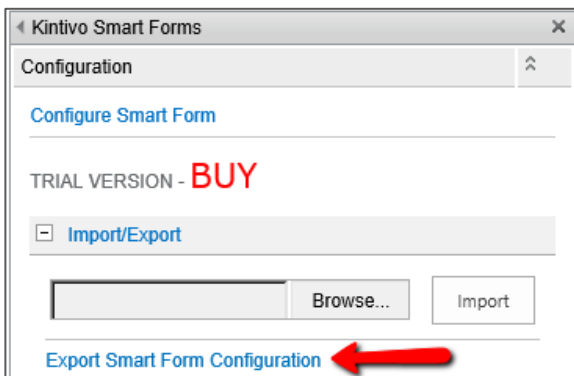


Import/Export Smart Forms

Smart Form configurations may be exported and imported as needed. Each Smart Form export will generate an XML file that you should keep in a safe place. This file should also be named in a way you will remember which form it represents.

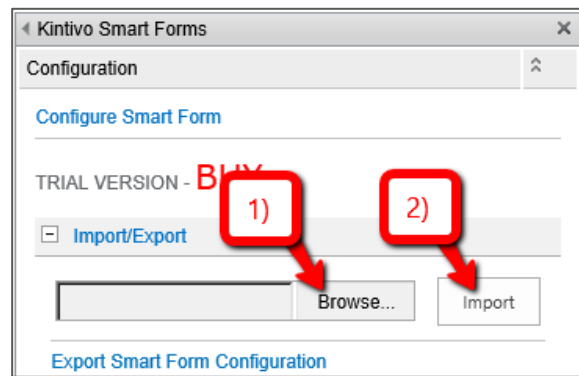
Export

Click "Export Smart Form Configuration".



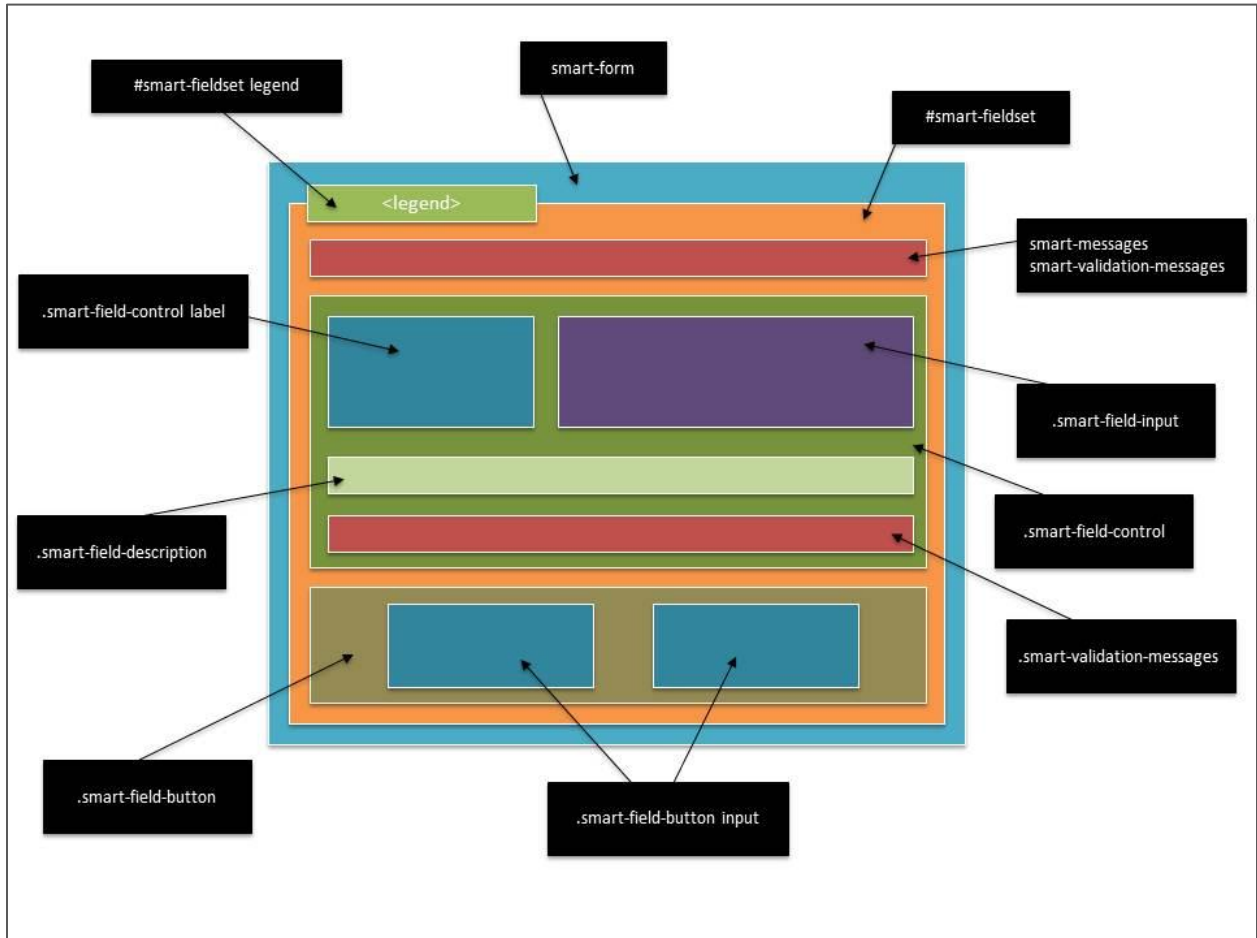
Import

Browse to your XML Export File. Click "Import".



Look & Feel

The default CSS is diagrammed below to help your designers more quickly make modifications.



CSS Diagram

