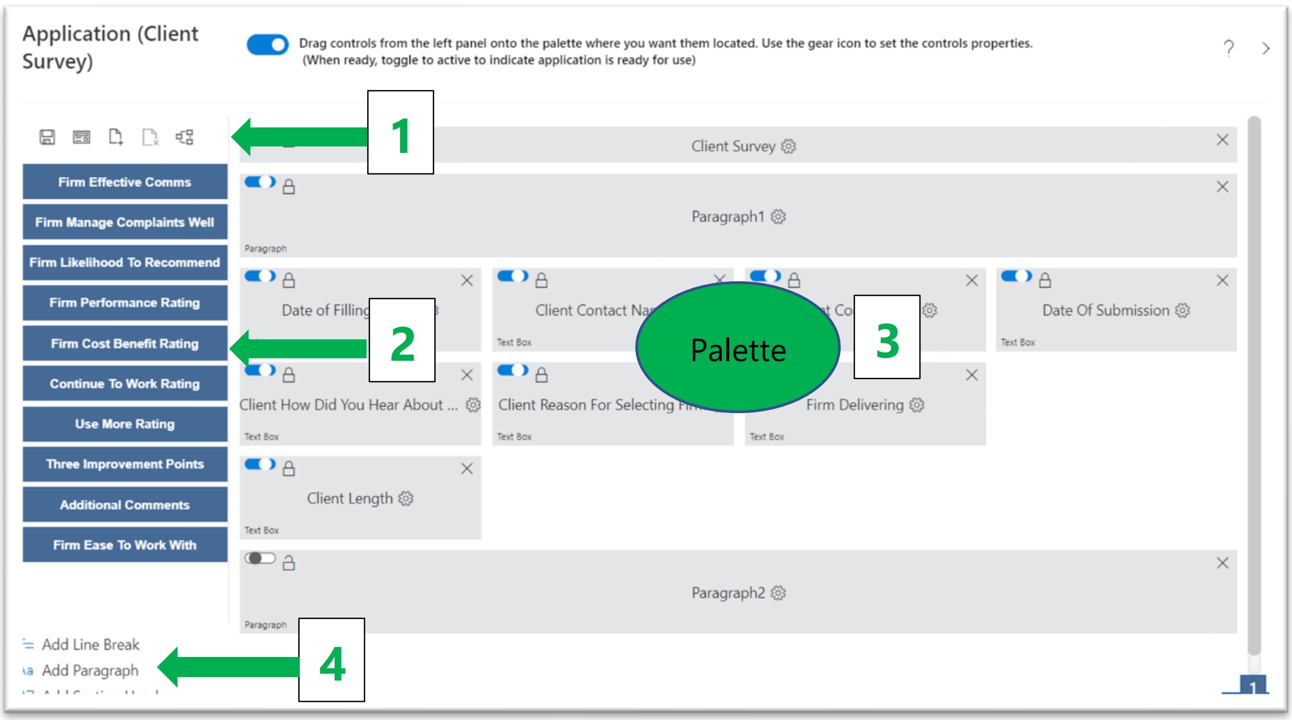
How To Configure a Webform Wizard

Webform Wizard Basics

The Wizard has four key layout elements:



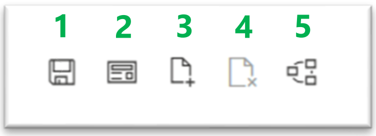
1. Commonly used **commands** including Save, Preview, Create Additional Pages, Remove Additional Pages as well as the ability to create Expressions

2. **Tag** List

3. Wizard **Palette**

4. Wizard Palette **Format Modifiers**

Commonly Used Commands



1. **Save** which allows you to save the Wizard throughout and after the build process.

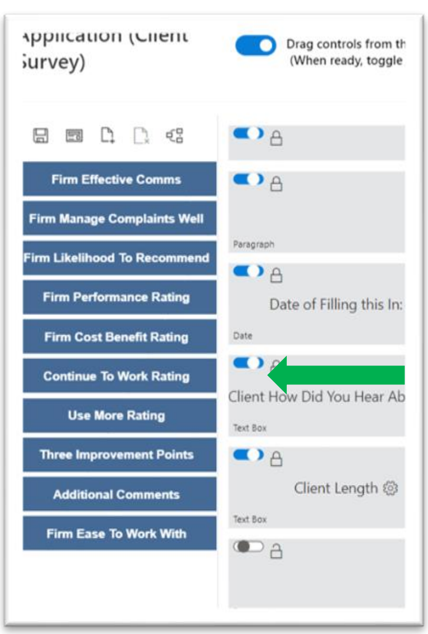
2. **Preview** which allows you to preview the form as it would appear to an end user.

3. **Create additional pages** (tabs) which allows you to separate out the form into different pages.

4. **Remove additional pages** (tabs) which allows you to remove a page you have created. Please ensure you navigate to the relevant page prior to removing it.

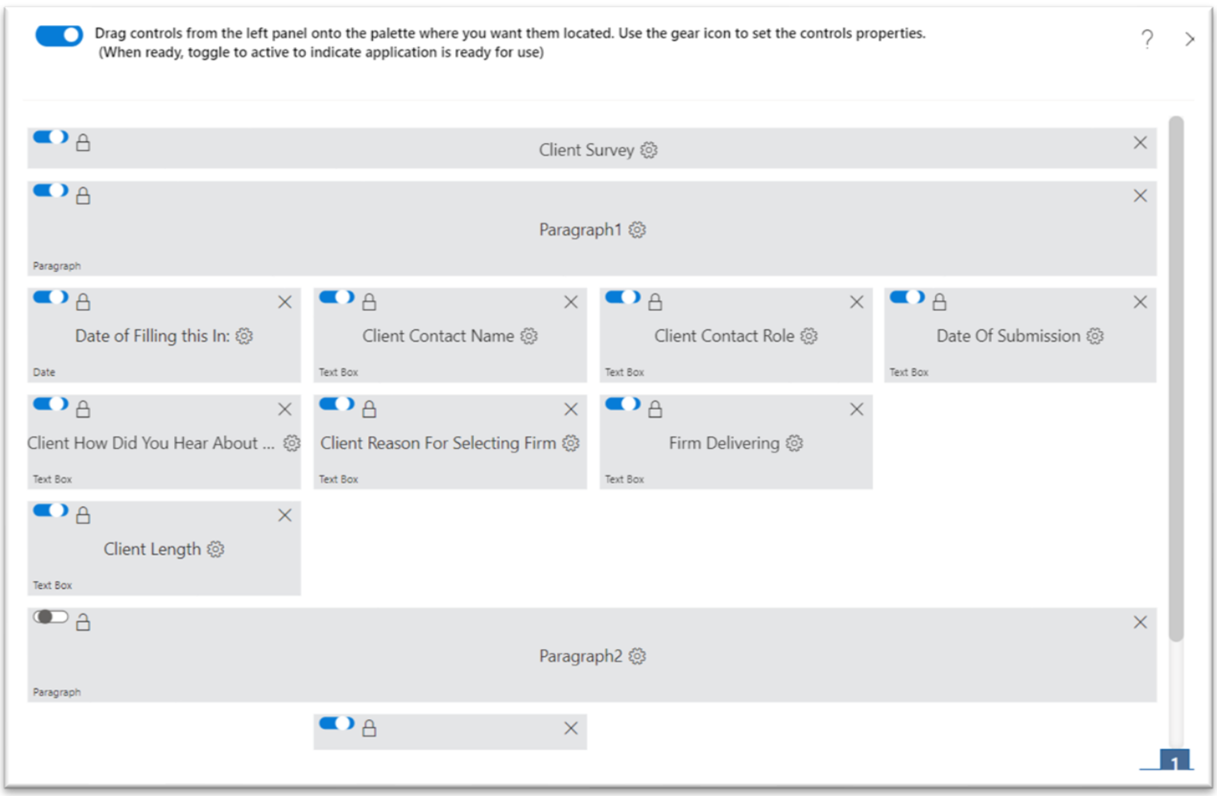
5. **Create Expressions** which, when created, performs calculations across a document (see "**Expressions**" below for further information).

Tag List



A tag list is a list of the tags that were created in the wizard when the tagged Word document was uploaded. These tags can be dragged and dropped into the Wizard Palette and configured depending on your requirements.

Wizard Palette



The Wizard Palette is where the various tags can be placed. Each tag represents a data field that feeds into the output document that is generated when a form is completed and submitted. The Wizard Palette is compatible with a standard browser only however the end user experience when filling in the form is responsible to standard browsers, tablets and mobile devices.

The various Properties available for a field depend on the field type specified, as follows:

Drop Down Lists

1. **Field Label** – The text displayed to end user on web form.

2. **Field Type** – Drop Down List for the purposes of this example.

3. **Tooltip Text** – Guidance language for the end users when hovering the mouse over the field.

4. **Tooltip Url** – Opens a separate tab to the specific target Url.

5. **Control Column Span** – Span can be set of a maximum of 4 columns.

6. **Required** – Specify here if filling in this field is mandatory for the end user.

7. **Read-Only** – Value is pre-set and the end user will not be able to select an option.

8. **Static List** – Enter the values separated by commas that the end user can select. Note that static lists should begin with "," before other list items when using Required property so that value will not pre-set for that drop down list.

9. **My Lists** – Is available by deselecting Static List. My Lists are shared lists that can be uploaded in "Settings" under "Lists" (see the Kim Document Guide for further information). These lists can be shared across applications.

10. **Default Value** – Use the default value to pre-set a value in the field when an end user initially opens the webform.

Drop Down (Multiple Selection)

1. **Field Label** – The text displayed to end user on web form.

2. **Field Type** – Drop Down (Multiple Selection) for the purposes of this example.

3. **Tooltip Text** – Guidance language for the end users when hovering the mouse over the field.

4. **Tooltip Url** – Opens a separate tab to the specific target Url.

5. **Control Column Span** – Span can be set of a maximum of 4 columns.

6. **Required** – Specify here if the field must be filled in by the end user or not.

7. **Read-Only** – Value is pre-set and the end user will not be able to select an option.

8. **Static List** – Enter values separated by commas that the end user can select. Note that static lists should begin with "," before other list items when using Required property so that a value will not be pre-set for that drop down list.

9. **My Lists** – Is available by deselecting Static List. My Lists are shared lists that can be uploaded in "Settings" under "Lists" (see the Kim Document Guide for further information). These lists can be shared across applications.

10. **Default Value** – Use the default value to pre-set a value in the field when an end user initially opens the webform.

Text Box

1. **Field Label** – The text displayed to end user on web form.

2. **Field Type** – Text Box for the purposes of this example.

3. **Tooltip Text** – Guidance language for the end users when hovering the mouse over the field.

4. **Tooltip Url** – Opens a separate tab to the specific target Url.

5. **Control Column Span** – Span can be set of a maximum of 4 columns.

6. **Required** – Specify here if the field must be filled in by the end user or not.

7. **Read-Only** – Value is pre-set and the end user will not be able to input an entry.

8. **Max Length** – Control the number of characters the end user can input.

9. **Default Value** – Use the default value to pre-set a value in the field when an end user initially opens the webform.

10. Additional controls may be applied by selecting **Mask or Pattern** as follows:

    a. Mask is an input specifier such as ##.##.

    b. Pattern supports regular expressions and an error message displays when the end user's input does not match the pattern.

Text Area

1. **Field Label** – The text displayed to end user on web form.

2. **Field Type** – Text Area for the purposes of this example.

3. **Tooltip Text** – Guidance language for the end users when hovering the mouse over the field.

4. **Tooltip Url** – Opens a separate tab to the specific target Url.

5. **Control Column Span** – Span can be set of a maximum of 4 columns.

6. **Required** – Specify here if the field must be filled in by the end user or not.

7. **Read-Only** – Value is pre-set and the end user will not be able to input an entry.

8. **Max Length** – Control the number of characters the end user can input.

9. **Default Value** – Use the default value to pre-set a value in the field when an end user initially opens the webform.

Rich Text Editor

1. **Field Label** – The text displayed to end user on web form.

2. **Field Type** – Rich Text Editor for the purposes of this example.

3. **Tooltip Text** – Guidance language for the end users when hovering the mouse over the field.

4. **Tooltip Url** – Opens a separate tab to the specific target Url.

5. **Control Column Span** – Span can be set of a maximum of 4 columns.

6. **Required** – Specify here if the field must be filled in by the end user or not.

7. **Read-Only** – Value is pre-set and the end user will not be able to input an entry.

8. **Max Length** – Control the number of characters the end user can input.

9. **Default Value** – Use the default value to pre-set a value in the field when an end user initially opens the webform.

Date

1. **Field Label** – The text displayed to end user on web form.

2. **Field Type** – Date for the purposes of this example.

3. **Tooltip Text** – Guidance language for the end users when hovering the mouse over the field.

4. **Tooltip Url** – Opens a separate tab to the specific target Url.

5. **Control Column Span** – Span can be set of a maximum of 4 columns.

6. **Required** – Specify here if the field must be filled in by the end user or not.

7. **Read-Only** – Value is pre-set and the end user will not be able to input an entry.

8. **Date Format** – Control the type of value that displays in the field. Use “dddd” to specify the Day of Week, “MMMM” to specify the Month, and “L” to specify month, day and year.

9. **Default Value** – Use the default value to pre-set a value in the field when an end user initially opens the webform.

Checkbox

Note: Document tags must begin with “[$chk” for checkboxes to apply to the output form as displayed in the screen capture below. See Special Tagging below for further information.

1. **Field Label** – The text displayed to end user on web form.

2. **Field Type** – Check Box for the purposes of this example.

3. **Tooltip Text** – Guidance language for the end users when hovering the mouse over the field.

4. **Tooltip Url** – Opens a separate tab to the specific target Url.

5. **Control Column Span** – Span can be set of a maximum of 4 columns.

FRATERNAL COMPANIES BEGIN FILING LIFE/FRATERNAL STATEMENT EFFECTIVE WITH FIRST QUARTER, 2019.

(1) Checklist	(2) Line #	(3) REQUIRED FILINGS FOR THE ABOVE STATE	(4) NUMBER OF COPIES* Domestic State	Domestic NAIC	Foreign State	(5) DUE DATE	(6) FORM SOURCE**	(7) APPLICABLE NOTES
		I. NAIC FINANCIAL STATEMENTS						
☒	1	Annual Statement (8 ½”x14”)	0	EO	xxx	3/1	NAIC	F, G
☒	1.1	Printed Investment Schedule detail (Pages E01-E29)	0	EO	xxx	3/1	NAIC	
☐	2	Quarterly Financial Statement (8 ½” x 14”)	0	EO	xxx	5/15, 8/15, 11/15	NAIC	G
☒	3	Separate Accounts Annual Statement (8 ½”x14”)	0	EO	xxx	3/1	NAIC	

Currency

1. **Field Label** – The text displayed to end user on web form.

2. **Field Type** – Currency for the purposes of this example.

3. **Tooltip Text** – Guidance language for the end users when hovering the mouse over the field.

4. **Tooltip Url** – Opens a separate tab to the specific target Url.

5. **Control Column Span** – Span can be set of a maximum of 4 columns.

6. **Required** – Specify here if the field must be filled in by the end user or not.

7. **Read-Only** – Value is pre-set and the end user will not be able to input an entry.

8. **Max Length** – Control the number of characters the end user can input. When prescribing a max length for a Currency field also account for commas and decimals. If up to 99,000.00 is desired, the length must be specified as 9.

9. **Default Value** – Use the default value to pre-set a value in the field when an end user initially opens the webform.

Integer

1. **Field Label** – The text displayed to end user on web form.

2. **Field Type** – Integer for the purposes of this example.

3. **Tooltip Text** – Guidance language for the end users when hovering the mouse over the field.

4. **Tooltip Url** – Opens a separate tab to the specific target Url.

5. **Control Column Span** – Span can be set of a maximum of 4 columns.

6. **Required** – Specify here if the field must be filled in by the end user or not.

7. **Read-Only** – Value is pre-set and the end user will not be able to input an entry.

8. **Max Length** – Maximum digits the end user can enter.

9. **Default Value** – Use the default value to pre-set a value in the field when an end user initially opens the webform.

Image

Note: Images require a Word content control to be placed on the source document and that a default image be placed into that content control. See Special Tagging for futher information.

1. **Field Label** – The text displayed to end user on web form.

2. **Field Type** – Image for the purposes of this example.

3. **Tooltip Text** – Guidance language for the end users when hovering the mouse over the field.

4. **Tooltip Url** – Opens a separate tab to the specific target Url.

5. **Required** – Specify here if the field must be filled in by the end user or not.

6. **Inline Help Text** – Guidance language that that displays to the end user in the field when filling in the webform.

Grid

Note: Grids require special tagging and to be placed with a table within the Word document. See Special Tagging for further information.

1. **Field Label** – No entry allowed for a Grid.

2. **Field Type** – When a grid is dropped onto the palette, the Field Type is automatically populated with the tagged list name.

3. **Tooltip Text** – Guidance language for the end users when hovering the mouse over the field.

4. **Columns** – The Wizard automatically identifies the columns specified within the Grid.

Each column value can be set as follows:

1. **Custom Label** – Enter the column field name..
2. **Column Type** – Options available are Integer, Currency, Text, Date, Dropdown List. See above for the detailed descriptions of each type of field.
3. **Required** – Specify here if the field must be filled in by the end user or not.
4. **Read-Only** - Value is pre-set and the and user will not be able to input an entry.

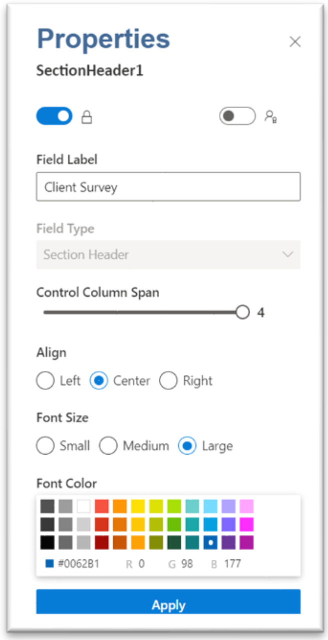
Wizard Palette Format Modifiers

Section Headers

Section Headers allows you place titles, subtitles and labels on the wizard palette to help guide the respondent through the form.

Section Header Properties include:

1. **Field Label** – The text displayed to end user on web form.
2. **Field Type** – Automatically defaulted to Section Header and cannot be changed.
3. **Control Column Span** – Span can be set of a maximum of 4 columns.
4. **Align** –Set alignment to the left, centre or right and defaulted to left for Section Headers.
5. **Font Size** – Options include small, medium and large and defaulted to medium for Section Headers.
6. **Font Colour** – Set the colour of the header text and defaulted to blue for Section Headers.



Paragraphs

Paragraphs allow a user to include text in the Wizard to help guide the user through the form.

Paragraph Properties include:

1. **Field Label** – This field is auto populated and does not appear on the form however a name can be included for administrative purposes.

2. **Field Type** – Automatically defaulted to Field Type and cannot be changed.

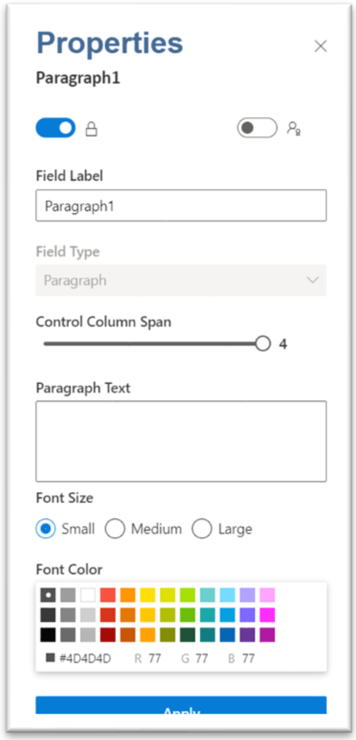
3. **Control Column Span** – Span can be set of a maximum of 4 columns.

4. **Paragraph Text** – Enter the text you would like displayed.

5. **Align** – Set alignment to the left, centre or right.

6. **Font Size** – Options include small, medium and large.

7. **Font Colour** – Allows you to set the colour of the text.



Line Breaks

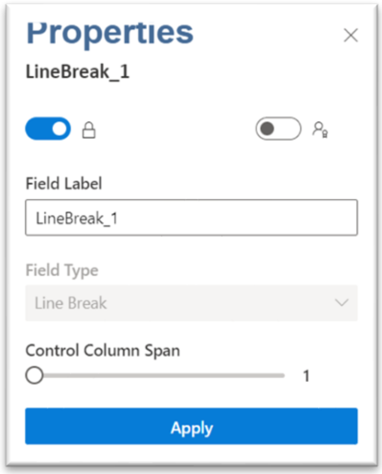
Line breaks enable a line break in the form which can be used to separate out different sections without the need for heads or paragraphs.

Line break properties include:

1. **Field Label** – This field is auto populated and does not appear on the form however a name can be included for administrative purposes.

2. **Field Type** – Automatically defaulted to Line Break and cannot be changed.

3. **Control Column Span** – Span can we set of a maximum of 4 columns.



Special Tagging

There are special tagging instructions that must be followed for Checkboxes, Grids, Reference Numbers, and Images. For Images and Reference Numbers, this requires use of Microsoft Word's Content Controls which can be accesses in the Developer ribbon

Checkboxes

On the Word document that you are tagging, checkbox tags must begin with "[$chk" for the Checkbox image to appear on the document generated from the webform. "[$chk" only impacts how the checkbox result displays on the generated document.

Here is an example of how you would upload the document into Kim:

FRATERNAL COMPANIES BEGIN FILING LIFE/FRATERNAL STATEMENT EFFECTIVE WITH FIRST QUARTER, 2019.

(1) Checklist	(2) Line #	(3) REQUIRED FILINGS FOR THE ABOVE STATE	(4) NUMBER OF COPIES* Domestic State	Domestic NAIC	Foreign State	(5) DUE DATE	(6) FORM SOURCE**	(7) APPLICABLE NOTES
		I. NAIC FINANCIAL STATEMENTS						
[SchkN1]	1	Annual Statement (8 ½"x14")	0	EO	xxx	3/1	NAIC	F, G
[SchkN1d1]	1.1	Printed Investment Schedule detail (Pages E01-E29)	0	EO	xxx	3/1	NAIC	
[SchkN2]	2	Quarterly Financial Statement (8 ½" x 14")	0	EO	xxx	5/15, 8/15, 11/15	NAIC	G
[SchkN3]	3	Separate Accounts Annual Statement (8 ½"x14")	0	EO	xxx	3/1	NAIC	
		II. NAIC SUPPLEMENTS						
[SchkN11]	11	Accident & Health Policy Experience Exhibit	0	EO	xxx	4/1	NAIC	

Here is an example of what the end user will see when filling in the webform:

2. Checklist Items

I. NAIC FINANCIAL STATEMENTS

☐ Annual Statement (8 ½"x14")

☐ Printed Investment Schedule detail (Pages E01-E29)

☐ Quarterly Financial Statement (8 ½" x 14")

☐ Separate Accounts Annual Statement (8 ½"x14")

Grids

When preparing the Word Document for upload into Kim, the Grids must be created in a Word table.

Multiple list types can be supported in a single grid. For example, you could have an Item List, Order List or a Service Schedule all within one grid.

Regardless of the type of list, Kim Document requires that all the list types follow this format:

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
[$Quantity_itemList]	[$Description_itemList]	[$UnitPrice_itemList]	[$Total_itemList]

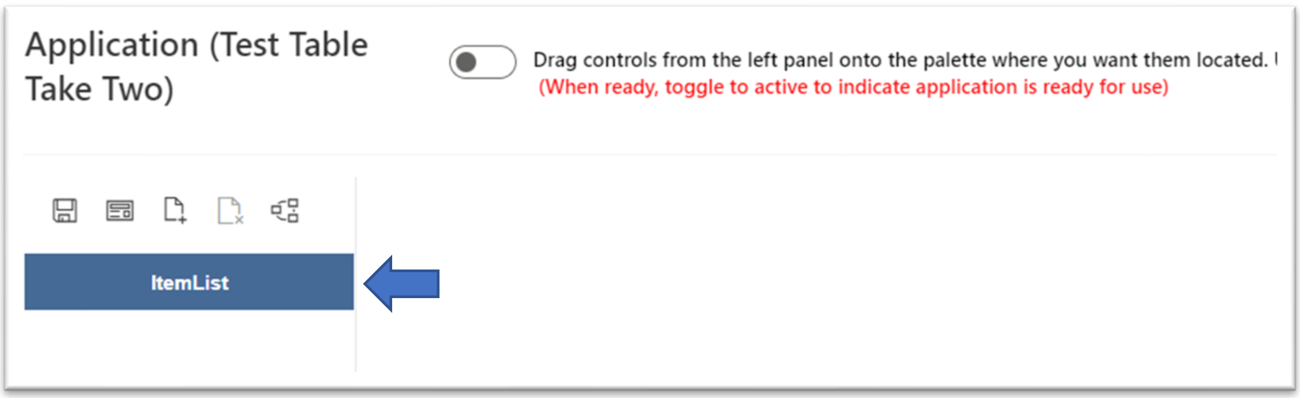
Grid Rules:

- All items in a list must start with the standard tagging format of [$;
- This is then followed by the relevant variable of that particular list. In the example above this could be the Quantity, Description, Unit Price and Total;
- All items in a list must end in the same list name. In the example above this is ItemList;
- Finally, always separate the variable and list name with an underscore.

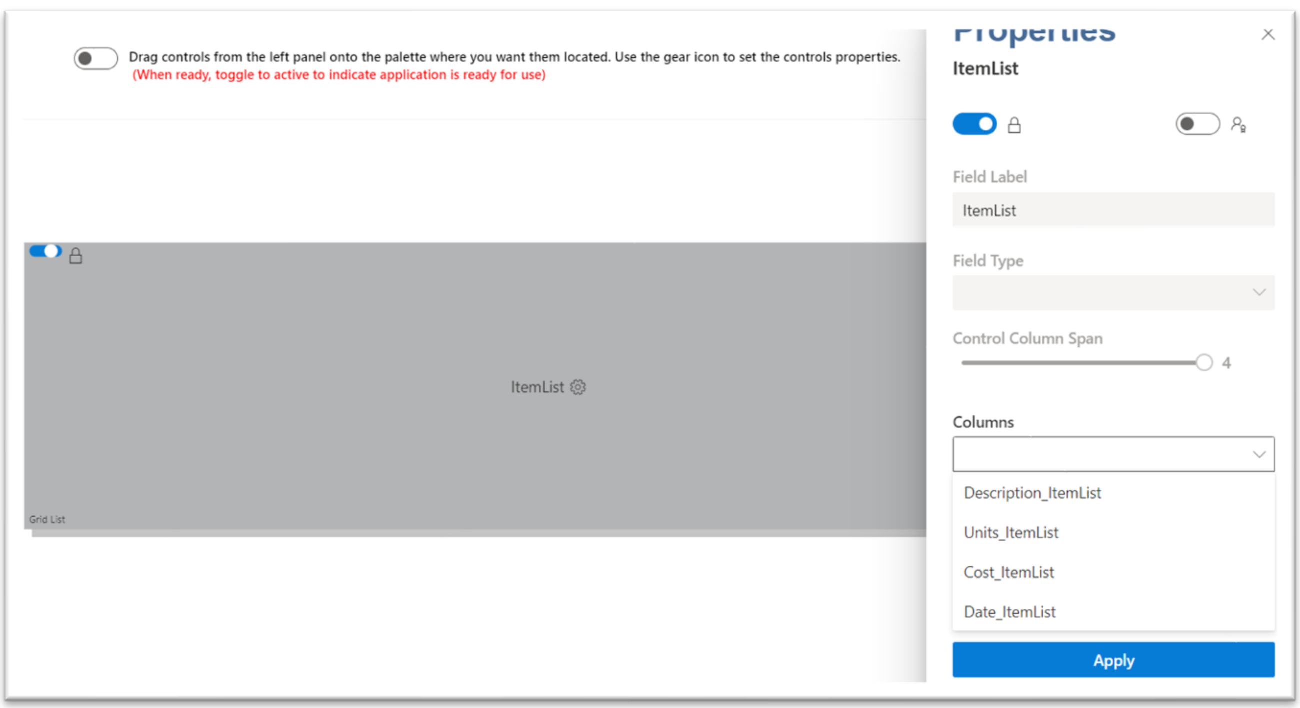
Point to note: Each tag item of a list is unique. Quantity, Description, Unit Price and Total are unique tags making up the "_itemList" so each column would have the following tags

[$Quantity_itemList], [$Description_itemList], [$UnitPrice_itemList], [$Total_itemList]

When the document is uploaded into Kim, the tag name will display as “item List” on the left-side as would a standard tag.



When dragged onto the Wizard Palette, you are then able to configure the tag/column settings:

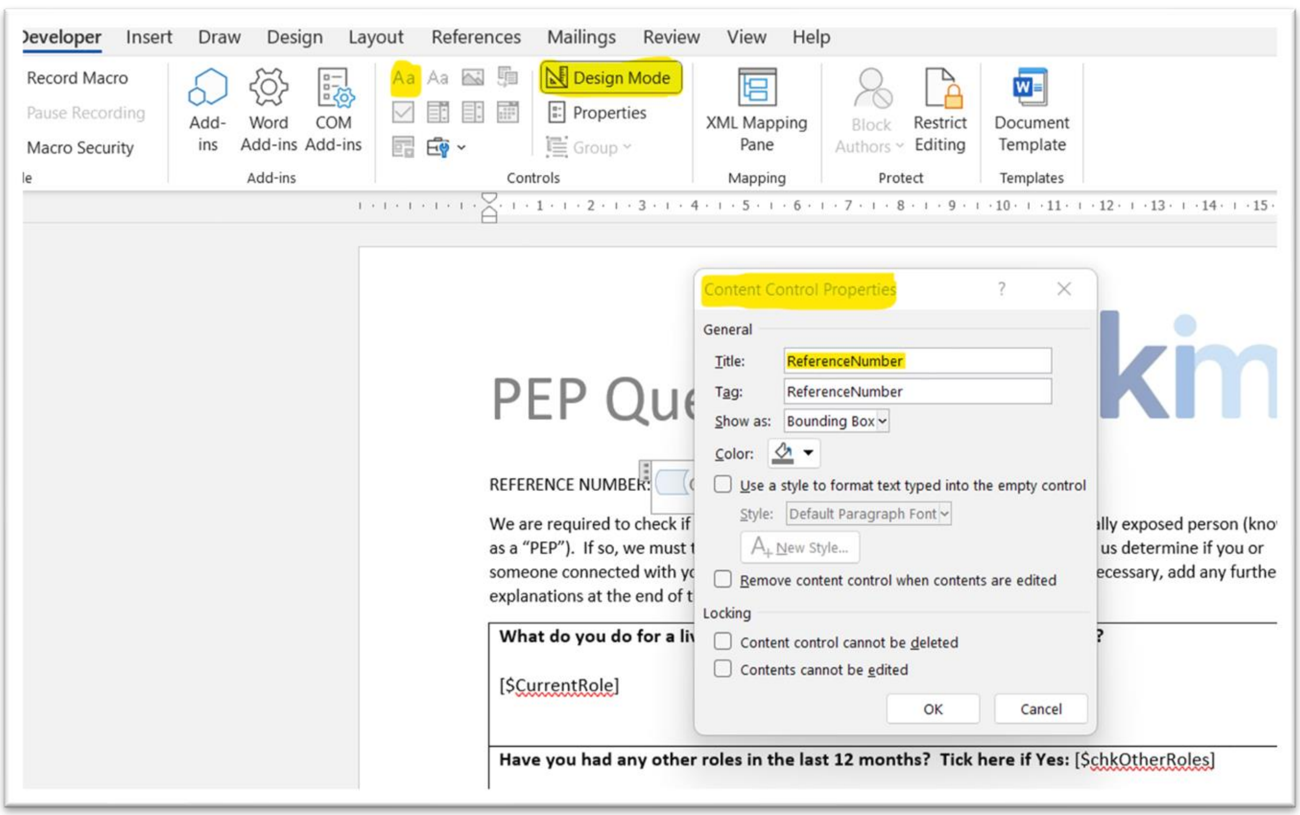


Reference Numbers

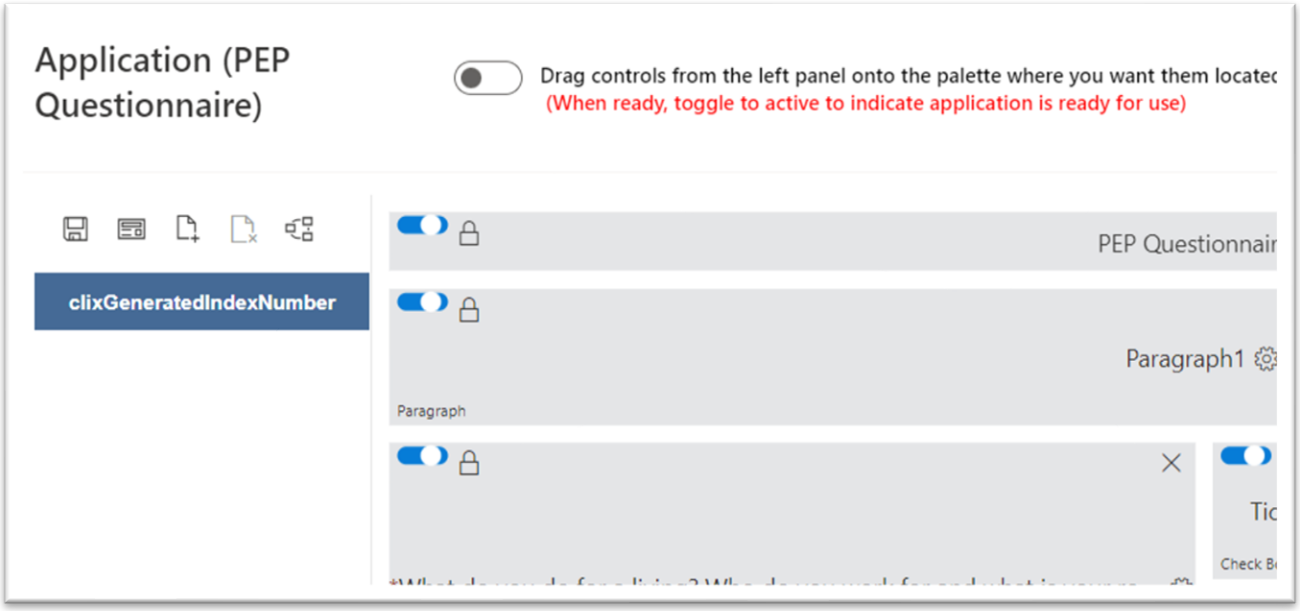
By default, every record created in Kim Document produces a unique reference number (as explained in the Kim Document Guide). The reference number format can be amended by applying such variables as [year], [month] and [day]. However, a reference number can also be displayed on documents and webforms.

The reference number is a system reserved constant called “clixGeneratedIndexNumber” and must be placed in a content control on the Word document by using the Developer Ribbon.

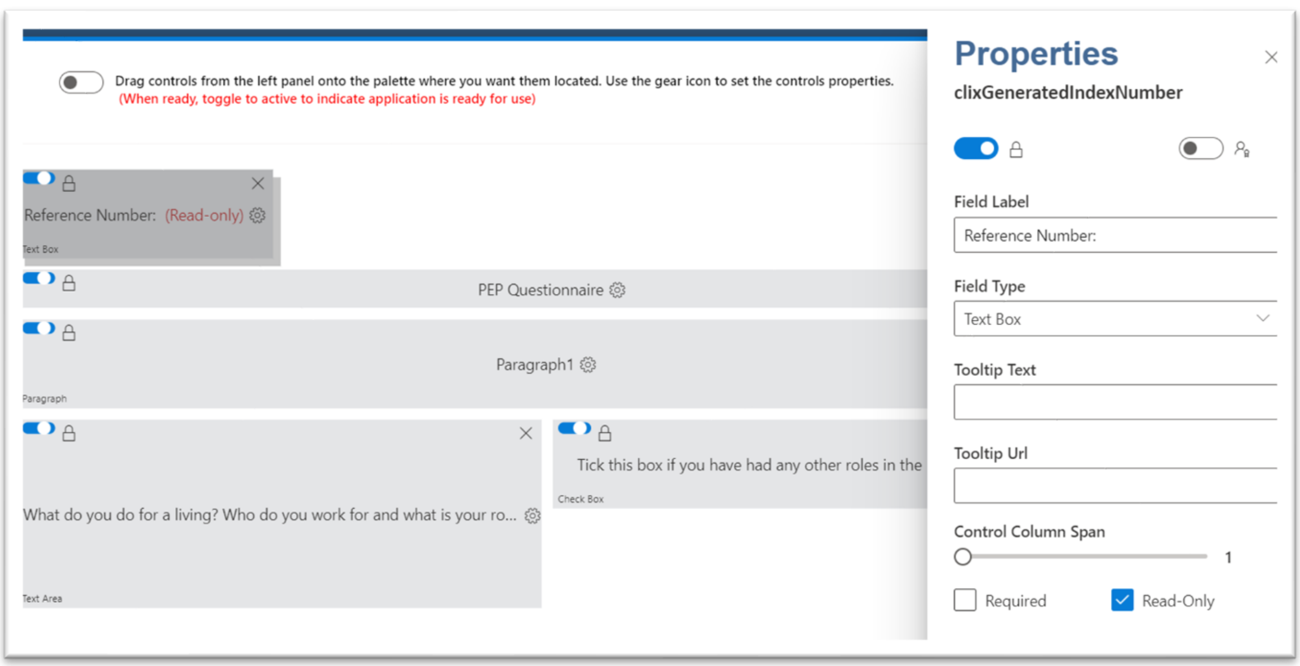
Note the four highlighted areas below. Using Word’s Developer Ribbon, select the content control AA from under reference, with cursor positioned at desired location on document and enter “clixGeneratedIndexNumber” for Tag. Click here for instructions how to activate Word developer ribbon.



When creating or updating a Kim Document application with a “clixGeneratedIndexNumber”, it will display on left-side as follows:



When this tag is dragged onto the palette, it is advised to leave Field Type as Text Box and select Read-Only attribute. For the purposes of this example, we have labelled the field "Reference Number:"



Only when an end user submits webform, the reference number is generated. In this example, reference number is 000000003:

PEP Questionnaire

REFERENCE NUMBER: 00000003

We are required to check if you, or anyone connected with you, might be a politically exposed person (known as a "PEP"). If so, we must take extra anti-money laundering precautions. To help us determine if you or someone connected with you is a PEP, please answer the questions below and if necessary, add any further explanations at the end of this questionnaire.

What do you do for a living? Who do you work for and what is your role?

CEO

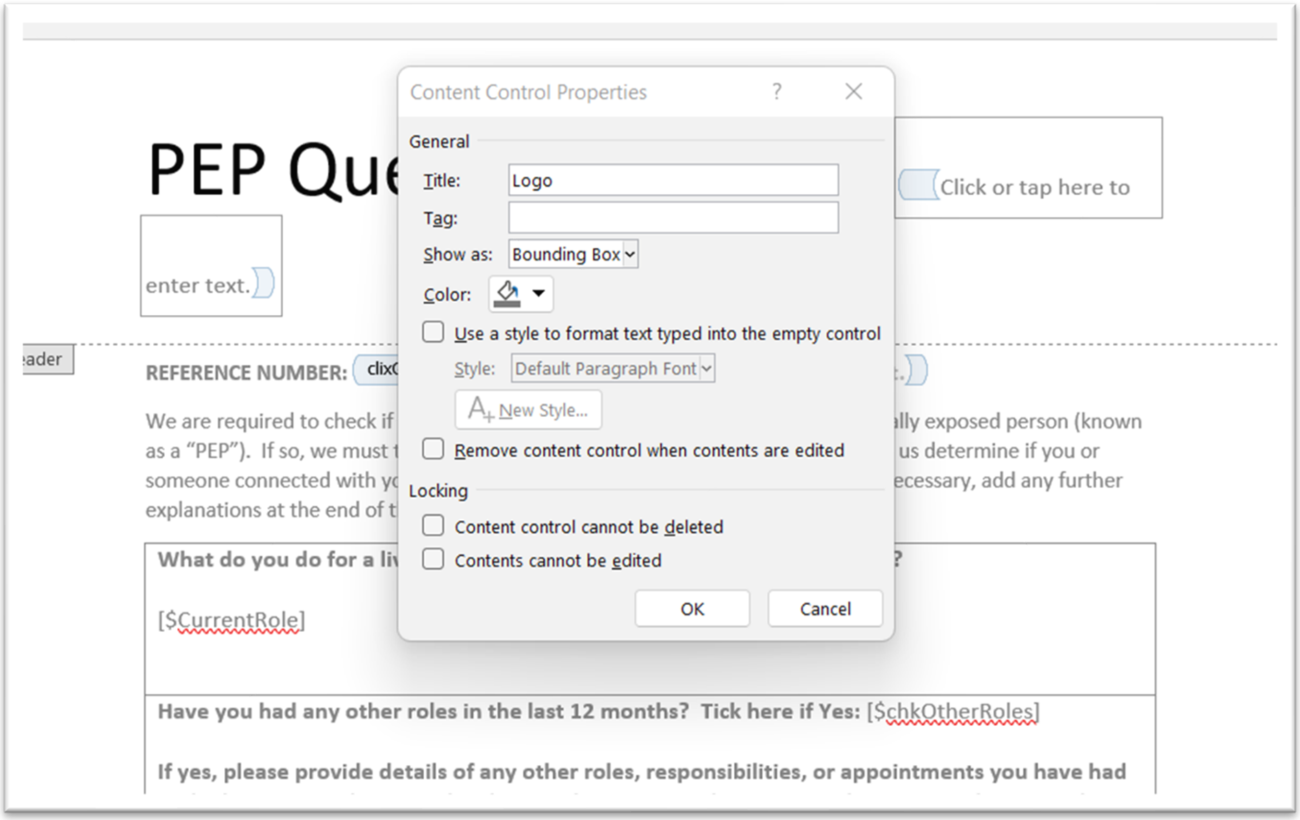
Note that when an end user updates the webform, the reference number will now display on the webform:

Images

Images have two configuration requirements:

1. Content control must be used when tagging; and
2. A reference image must be placed into the content control.

It is recommended to use a name to appropriately describe the content control. For example, the following content control is named logo:



When creating a new application, the document uploads and places the tag on the left-side of the workspace with all the other standard tags.

Expressions

Expressions can be used to add/subtract/multiply/divide numeric tag entries, sum grid column tags, link tag entries and adjust dates from tag entries.

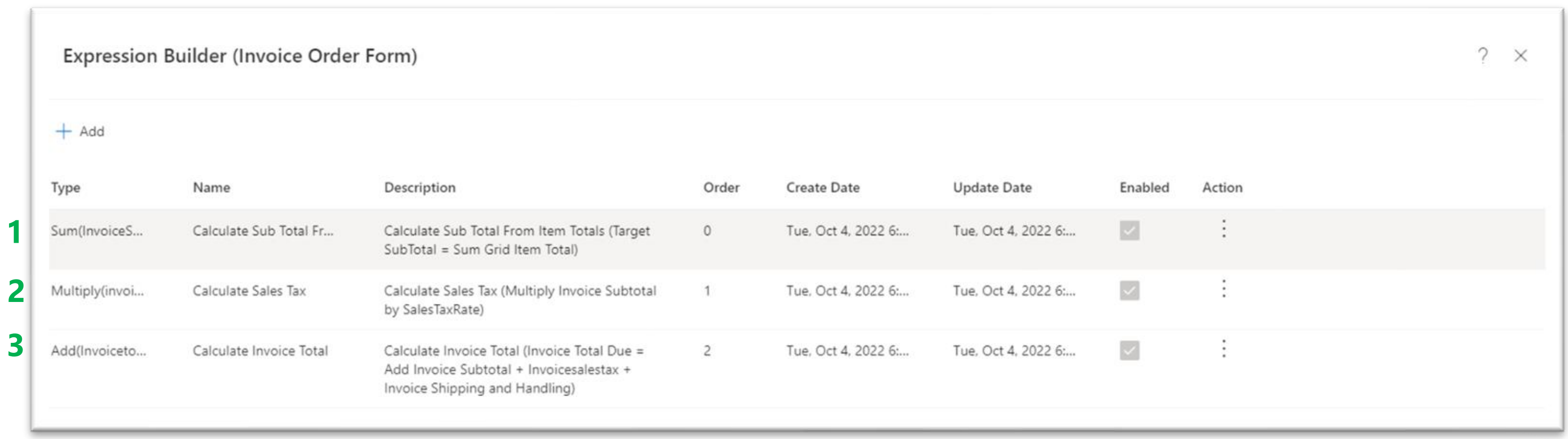
As an example:

A series of expressions need to be configured to generate an invoice. These expressions include:

1. Getting the subtotal by summing the total column from the grid.
2. Getting the tax due by multiplying the sales tax rate by the subtotal above.
3. getting the total amount due by adding the subtotal, tax and shipping and handling.

When creating the expressions, please note that an invoice requires an order of processing to get the correct total. Here are the various expressions required for this example:

Here are the expressions for an invoice order form:



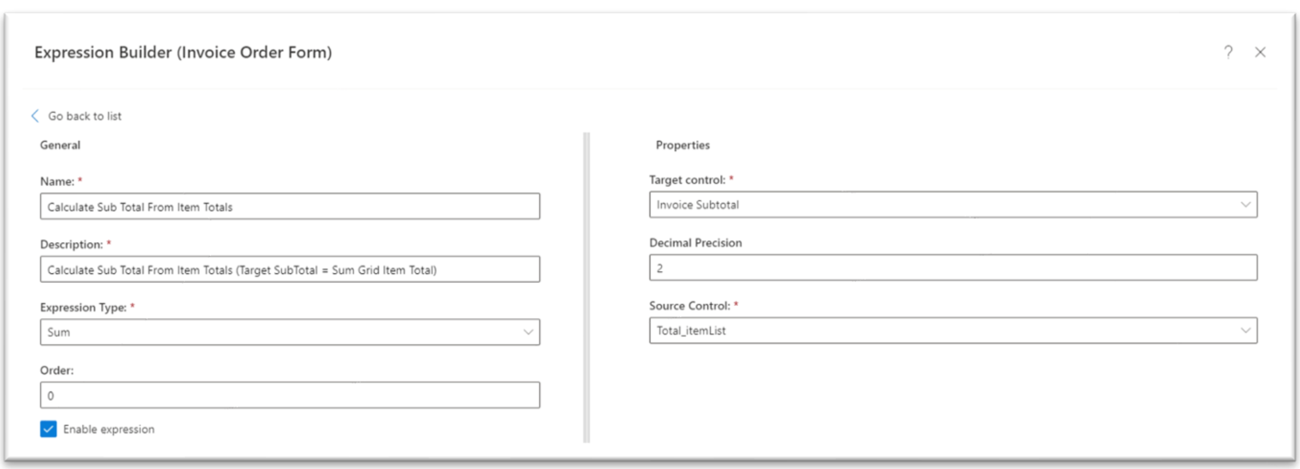
Expression Builder (Invoice Order Form)

+ Add

	Type	Name	Description	Order	Create Date	Update Date	Enabled	Action
1	Sum(InvoiceS...	Calculate Sub Total Fr...	Calculate Sub Total From Item Totals (Target SubTotal = Sum Grid Item Total)	0	Tue, Oct 4, 2022 6:...	Tue, Oct 4, 2022 6:...		
2	Multiply(invoi...	Calculate Sales Tax	Calculate Sales Tax (Multiply Invoice Subtotal by SalesTaxRate)	1	Tue, Oct 4, 2022 6:...	Tue, Oct 4, 2022 6:...		
3	Add(Invoiceto...	Calculate Invoice Total	Calculate Invoice Total (Invoice Total Due = Add Invoice Subtotal + Invoicesalestax + Invoice Shipping and Handling)	2	Tue, Oct 4, 2022 6:...	Tue, Oct 4, 2022 6:...		

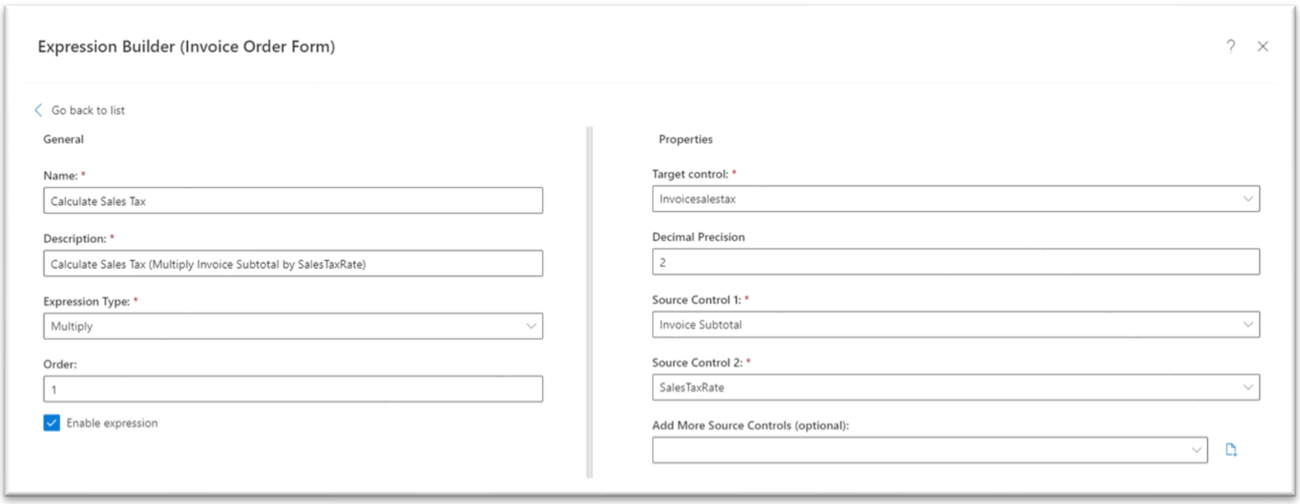
1. First Sum the grid total column. When expression type Sum is specified, the only Source Controls available are from the grid list items.

   This expression Sums “Total_itemList” Tag rounding to 2 decimal places and sets result into “Invoice Subtotal” Tag.



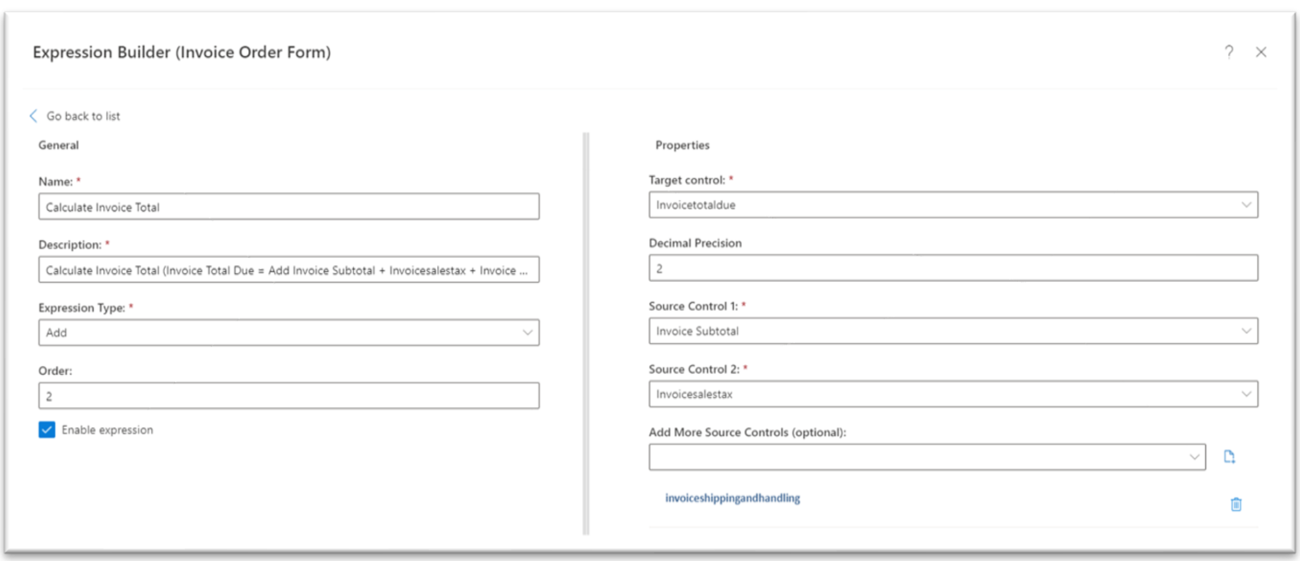
2. Then Multiply will calculate the sales tax. When expression type multiply is specified, there can be 2 or more source Tag controls.

This expression Multiplies the “Invoice Subtotal” Tag from #1 by “SalesTaxRate” Tag rounding to 2 decimal positions and sets the result in “Invoicesalestax” Tag.

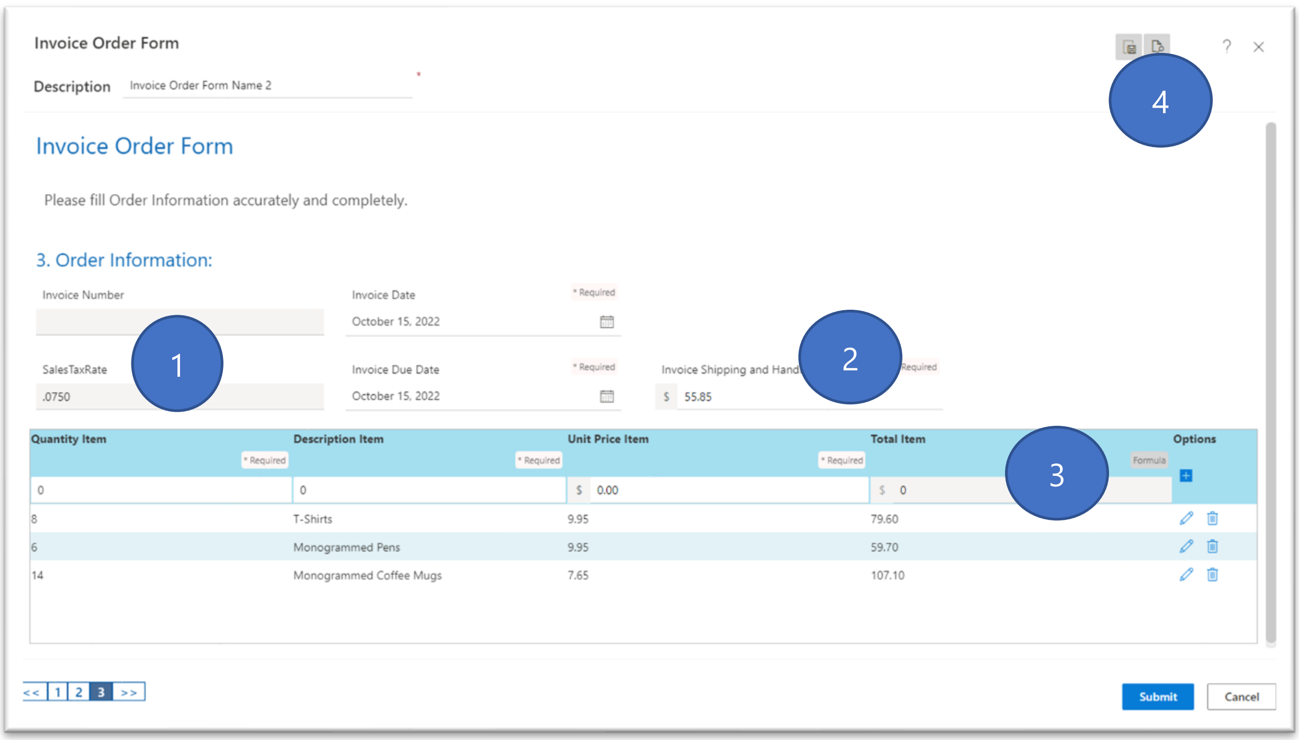


3. Then Add to get invoice total due. When expression type Add is specified, there can be two or more Source Tag controls.

   This expression Adds the “Invoice Subtotal” Tag sets “Invoicesalestax” Tag plus “invoiceshippingandhandling” Tag, rounds the result to 2 decimal positions and sets result in “Invoicetotaldue”.



The webform will then appear as follows with (Note: 1-Sales Tax Rate, 2-Invoice Shipping and Handling, 3-Total Column, 4-Either preview the document or submit and the above expressions will execute):

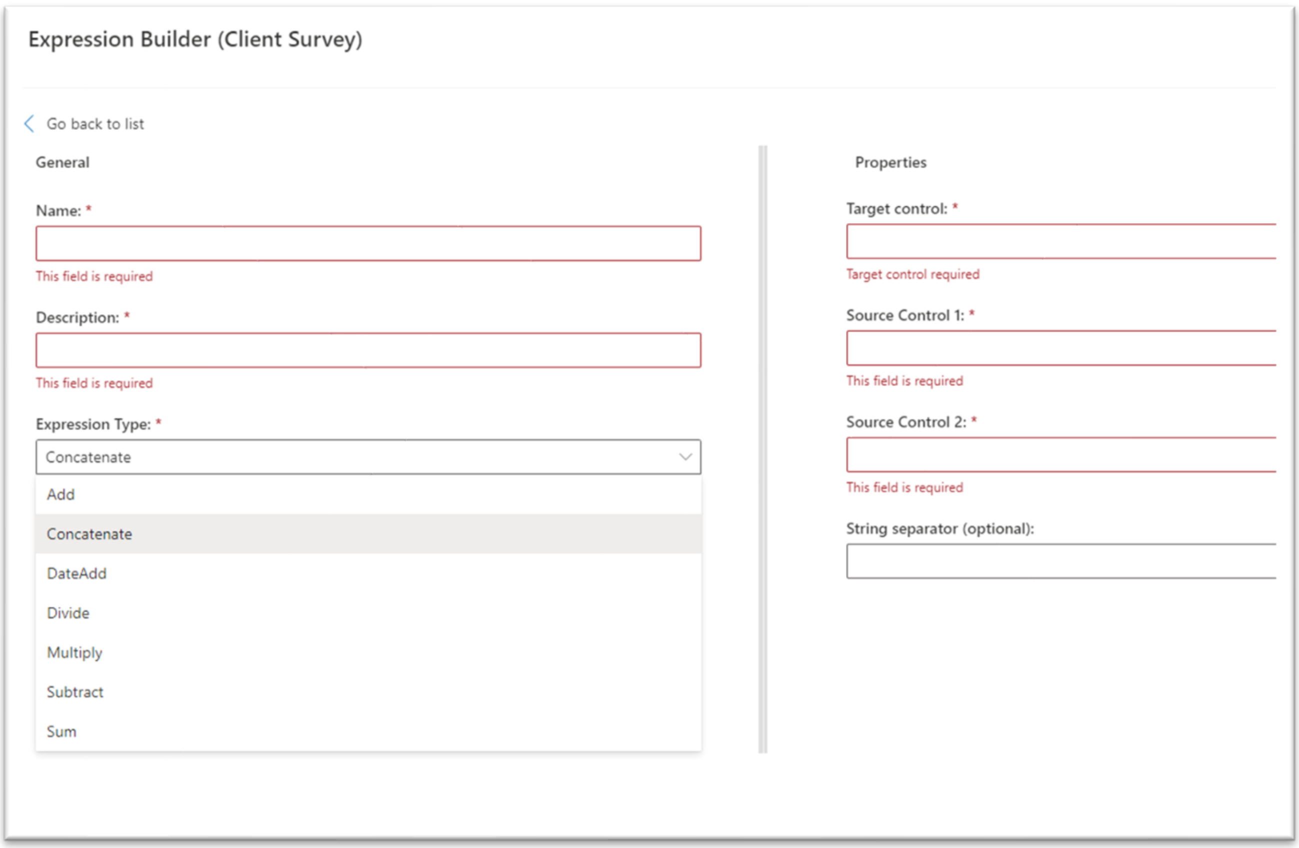


When submitted, the expression results will be applied to the document as follows:

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
8	T-Shirts	9.95	79.60
6	Monogrammed Pens	9.95	59.70
14	Monogrammed Coffee Mugs	7.65	107.10

SUB TOTAL	$246.40
SALES TAX	$18.48
SHIPPING & HANDLING	$55.85
TOTAL	$320.73
DATE	October 15, 2022

Expression Types



1. **Add -** Use Add to accumulate values by specifying two or more Source Control Tags, set decimal positions and apply to a Target Control Tag.

2. **Concatenate -** Use Concatenate to append two Source Control Tags using an optional String separator. E.g., Concatenate Source Control Tag "FirstName" with Source Control Tag "LastName" separated with a space and set result in Target Control "FullName".

3. **DateAdd -** Use DateAdd to derive a Target Control Tag date from a Source Control Tag date such as Date Due. Consider Date Due is one month from Date Submitted. Source Control Tag would be Date Submitted Tag, set Unit to month, Add/Subtract 1, select appropriate Date Format and set result in Target Control Tag Date Due. Instead of having the end user enter a future date, calculate it.

4. **Divide -** Use Divide for two or more Source Control Tags, set decimal position and set the result in a Target Control Tag.

5. **Multiply -** Use Multiply for two or more Source Control Tags, set the decimal positions and set the result in a Target Control Tag.

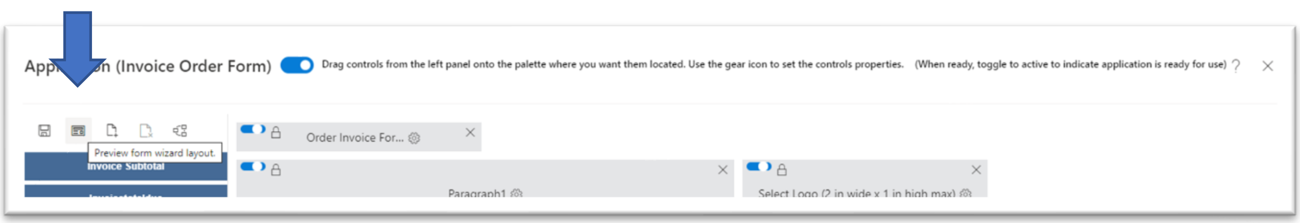
6. **Subtract -** Use Subtract for two or more Source Control Tags, set the decimal positions and set the result in Target Control Tag.

7. **Sum -** Different from all the other expressions, Sum Source Control will only come from Item Lists. Sum all rows for the specified Source Control Tag, set the decimal positions, and set result in the Target Control Tag.

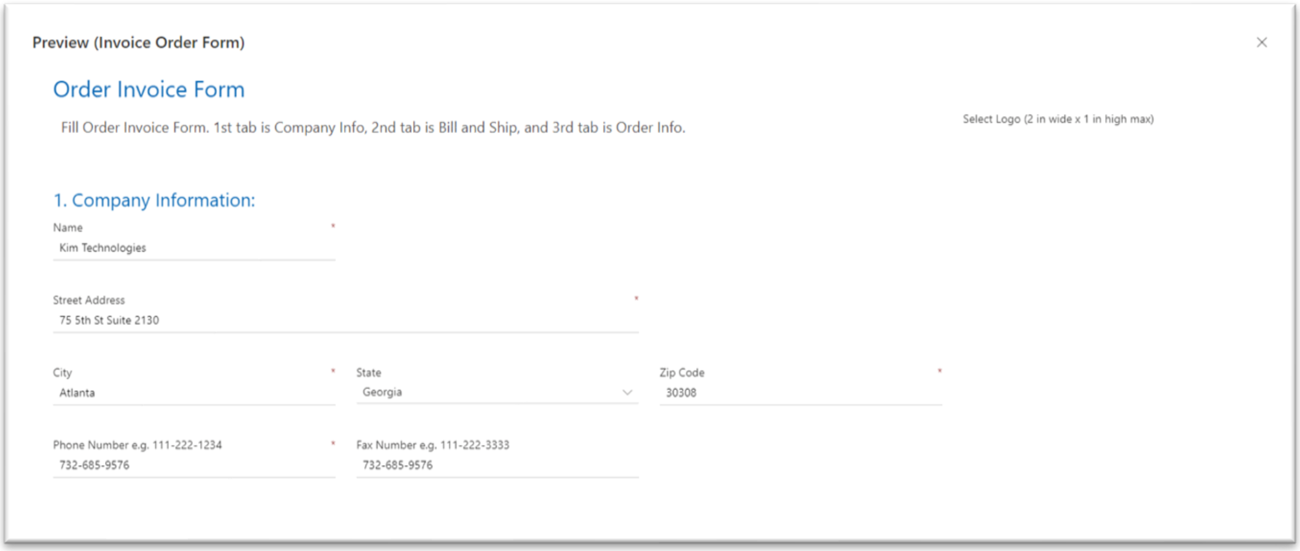
Testing the Wizard

Wizard Runtime Preview

This provides a basic output presentation when building the Wizard Palette. Please note that Required, mask, regular expressions and drop-down fields will interact but grids and images only identify location and do not function in this view.

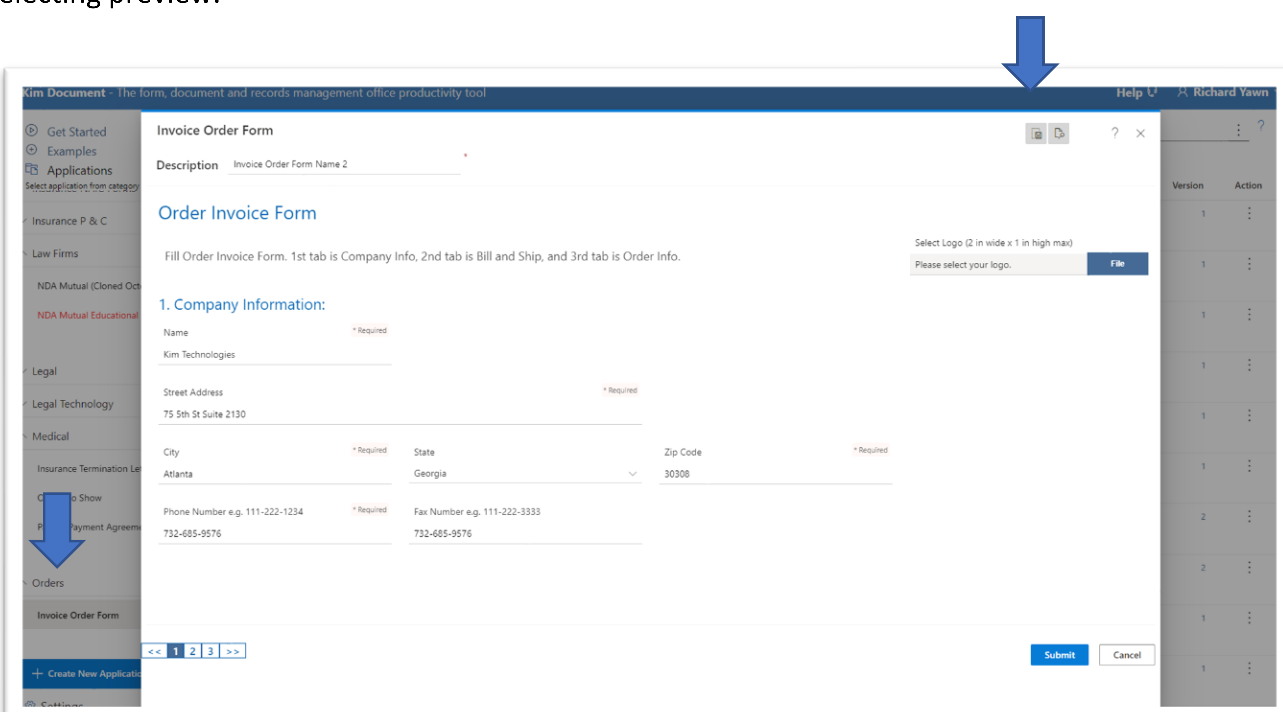


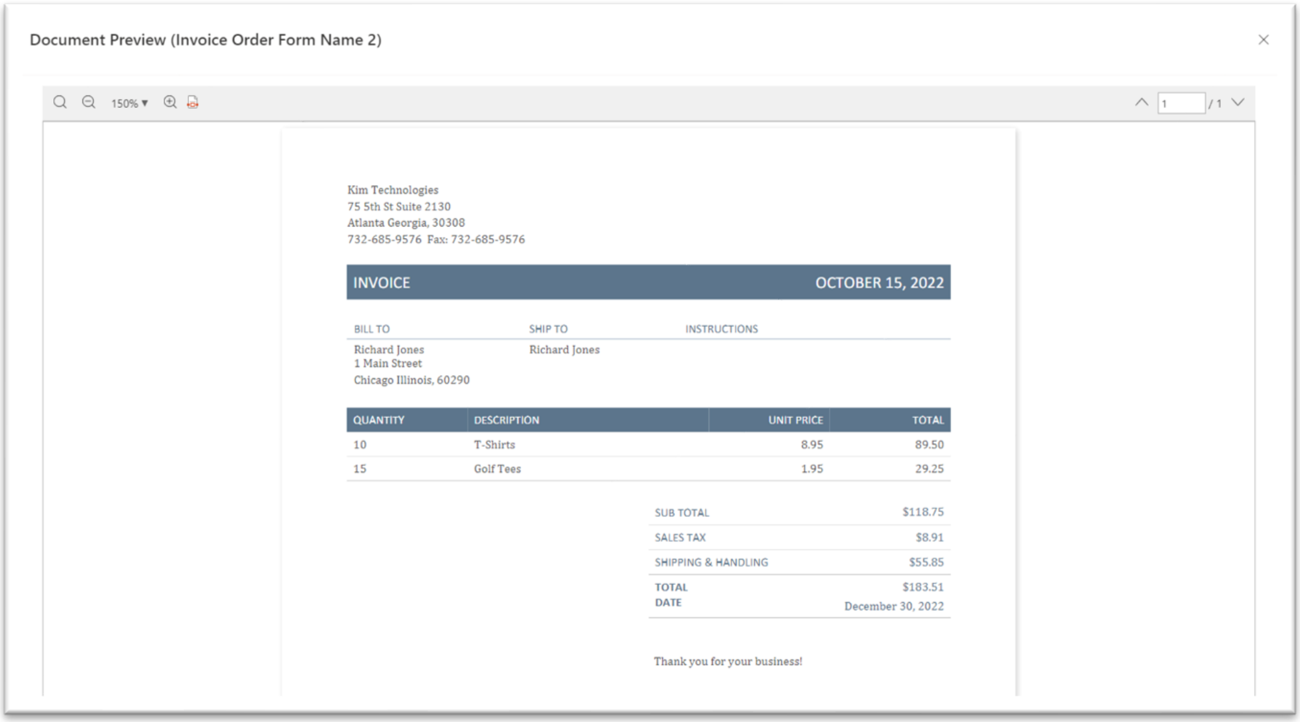
Grids and Image controls only show positioning in this preview that can be generated when the end user is filling in the webform (see below):



Webform Preview

The end user experience may be tested at any time even when there are fields with no responses. This can be done by selecting the application from your application menu and selecting preview.




Document Preview (Invoice Order Form Name 2)

150%

1 / 1

Kim Technologies
75 5th St Suite 2130
Atlanta Georgia, 30308
732-685-9576 Fax: 732-685-9576

INVOICE	OCTOBER 15, 2022

BILL TO	SHIP TO	INSTRUCTIONS
Richard Jones 1 Main Street Chicago Illinois, 60290	Richard Jones	

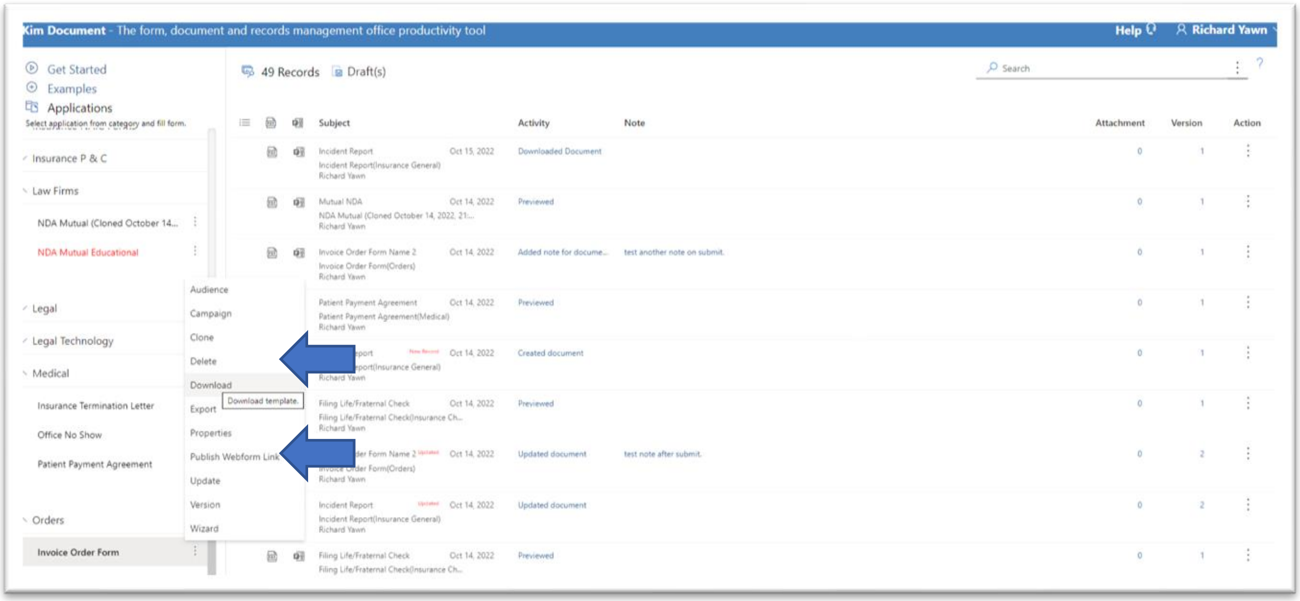
QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
10	T-Shirts	8.95	89.50
15	Golf Tees	1.95	29.25

SUB TOTAL	$118.75
SALES TAX	$8.91
SHIPPING & HANDLING	$55.85
TOTAL	$183.51
DATE	December 30, 2022

Thank you for your business!

Modifying a Document and Adding/Removing Tags

Any modifications to the document’s appearance, adding Tags or removing Tags requires that the document is first downloaded from the application menu and then updated from the same menu to complete. The application tracks these changes in Version history (see the Kim Document Guide under “Version”).



To change a documents format when needed, click on “Update” in the applications actions menu (see the Kim Document Guide under “Update”).

If additional tags have been uploaded they will be applied to the palette list of tags automatically.

Deletion of tags that were previously uploaded is not possible as when uploaded, they form part of the “Data Model”. This is required to allow for the reinstatement of previous versions of an application, ability to view and manage previously generated records and REST integration.