



SMARTFORM INSPECTOR for K2 Five



User Guide

April 2020

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<http://www.bytezoom.com>



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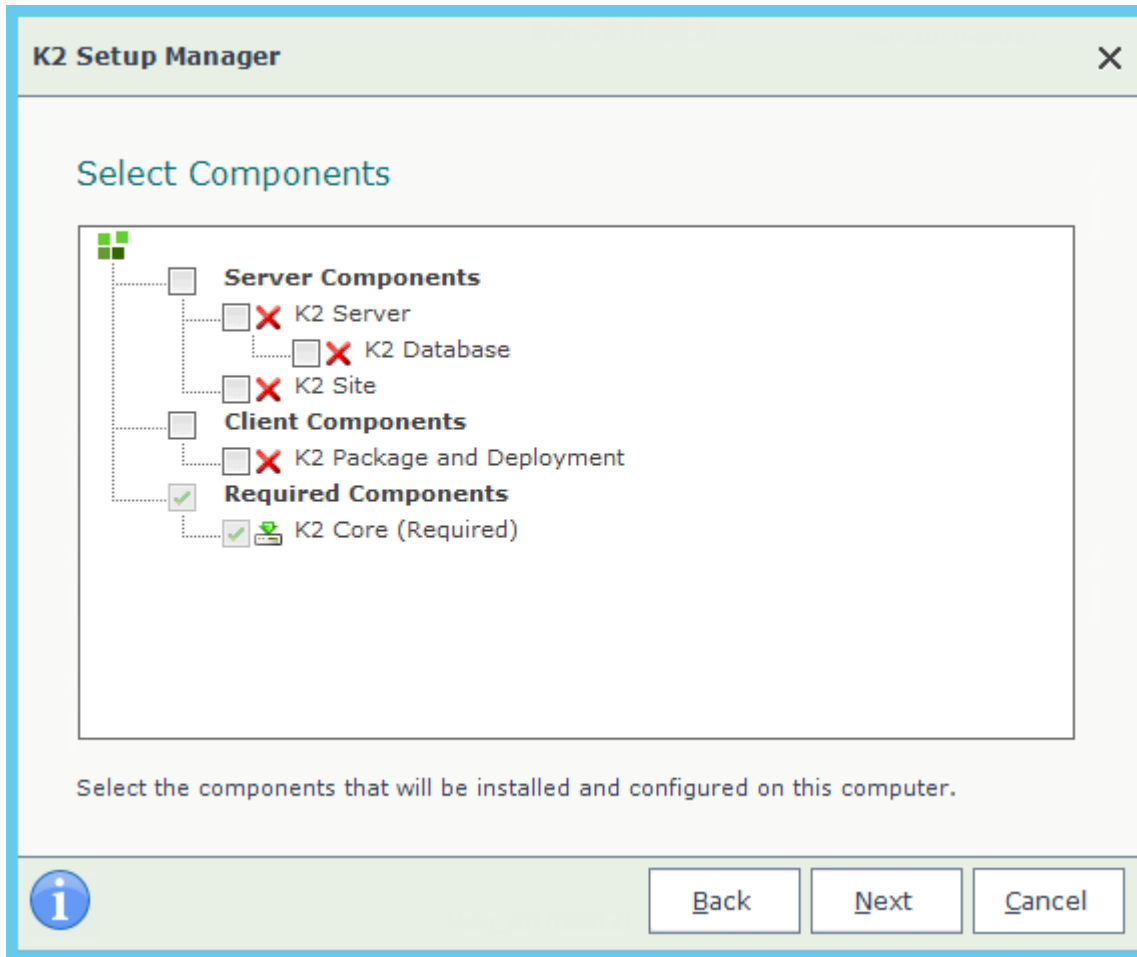
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Pre-requirements

If SmartForm Inspector will install to non K2 Server, it requires to install K2 client libraries same version as K2 Server.

Use K2 Setup Manager: [<https://help.k2.com/onlinehelp/k2five/icg/5.3/default.htm#Install/Manual/ClientTools.htm>]



Also, check is K2 Server available by TCP/IP and port 5555 is open.

CA: Administrator: Command Prompt

```
C:\Users\administrator.SMARTK2>ping 172.30.3.77

Pinging 172.30.3.77 with 32 bytes of data:
Reply from 172.30.3.77: bytes=32 time<1ms TTL=128
Reply from 172.30.3.77: bytes=32 time<1ms TTL=128
Reply from 172.30.3.77: bytes=32 time<1ms TTL=128
Reply from 172.30.3.77: bytes=32 time<1ms TTL=128

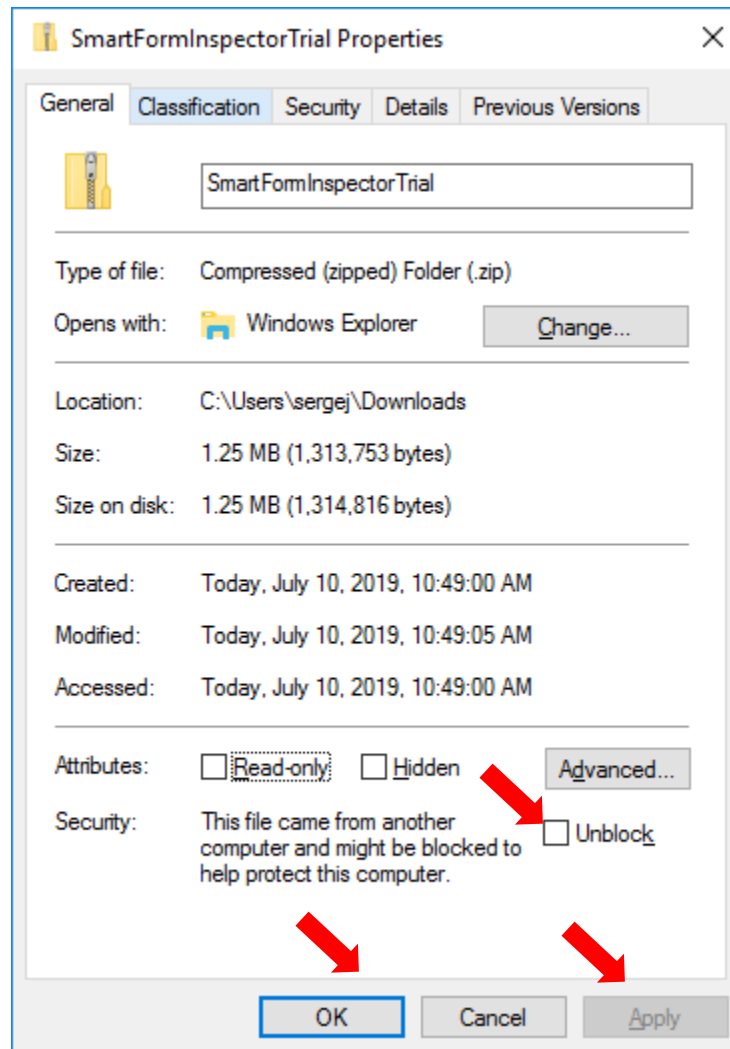
Ping statistics for 172.30.3.77:
    Packets: Sent = 4, Received = 4, Lost = 0 (0% loss),
    Approximate round trip times in milli-seconds:
        Minimum = 0ms, Maximum = 0ms, Average = 0ms

C:\Users\administrator.SMARTK2>telnet 172.30.3.77 5555
```



Installing SmartForm Inspector

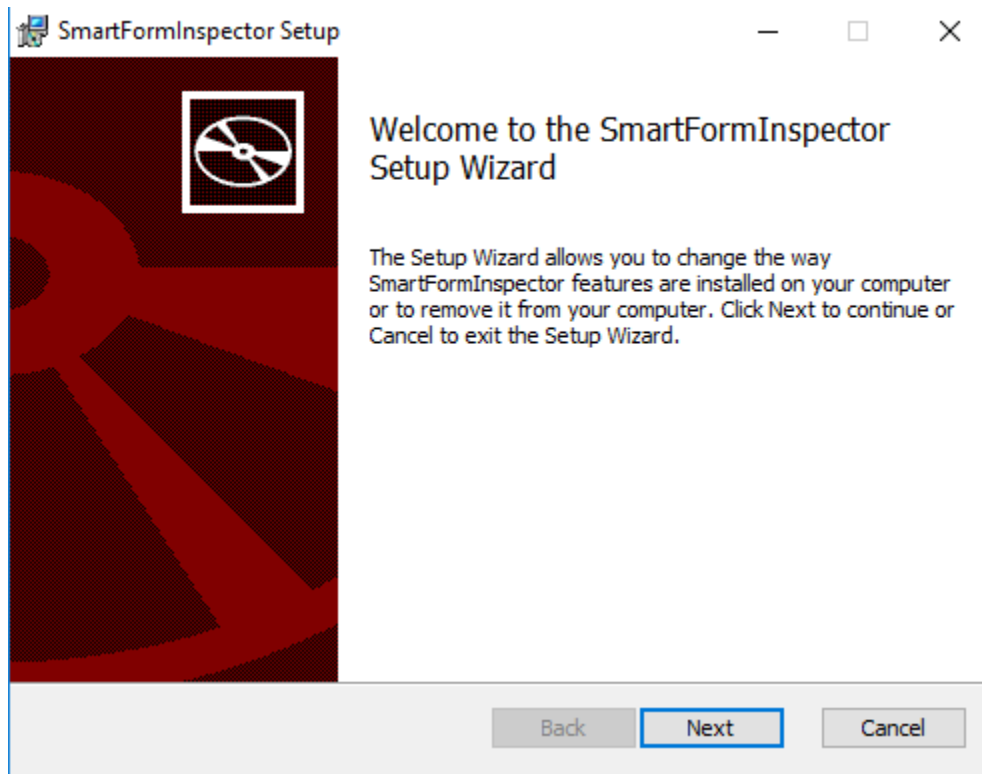
1. Download zip file
2. Right-click and choose properties
3. If necessary unblock the file
4. Click Apply and OK as shown on image below



5. Extract all from zip file
6. Run the SmartForm Inspector installer **SmartFormInspector.msi** from extracted folder



7. Click Next

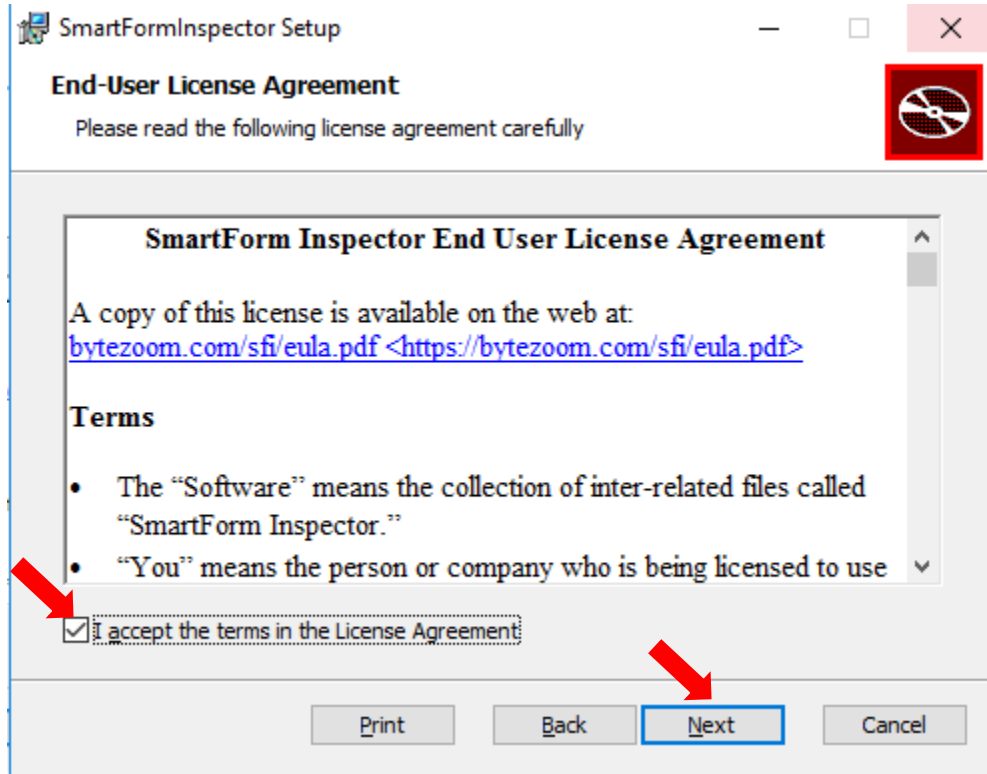


8. Check "I accept the terms in the License Agreement" check box and click **Next**.



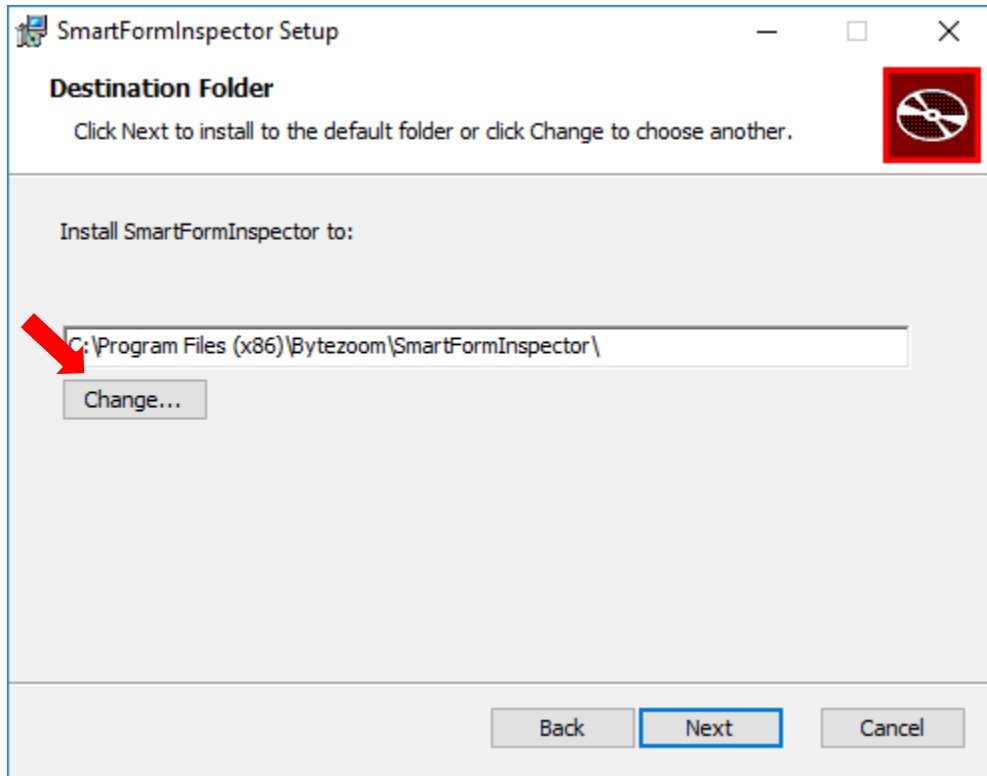
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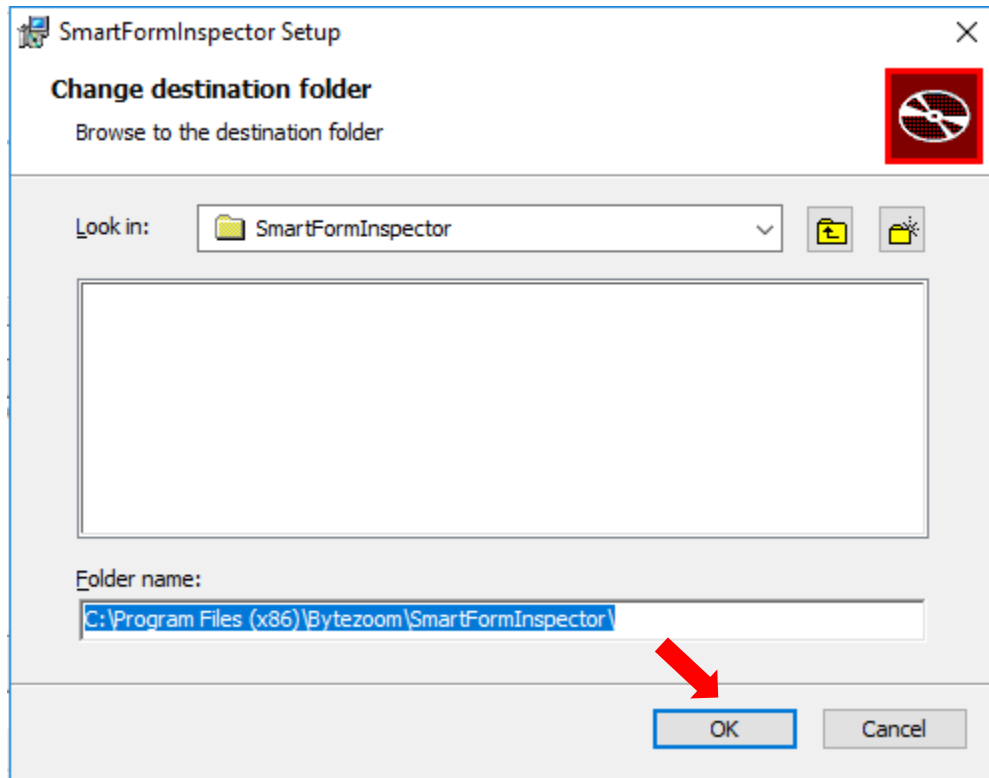




9. You can change the installation folder by clicking **Change**

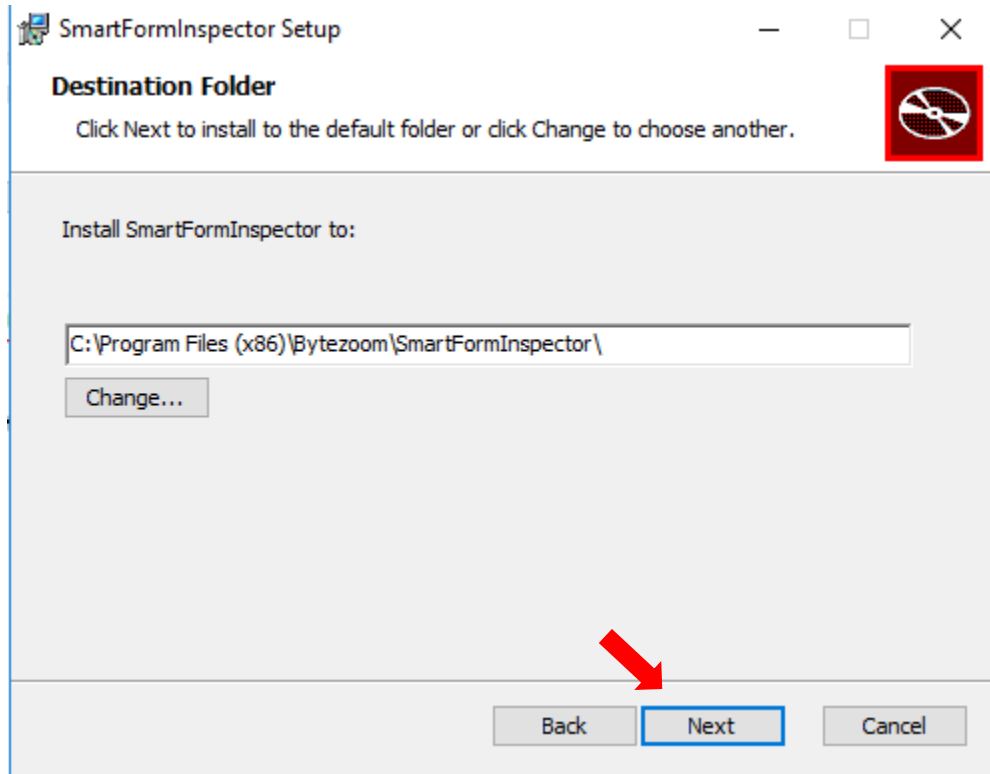


10. Select a different folder if you need and click **OK**

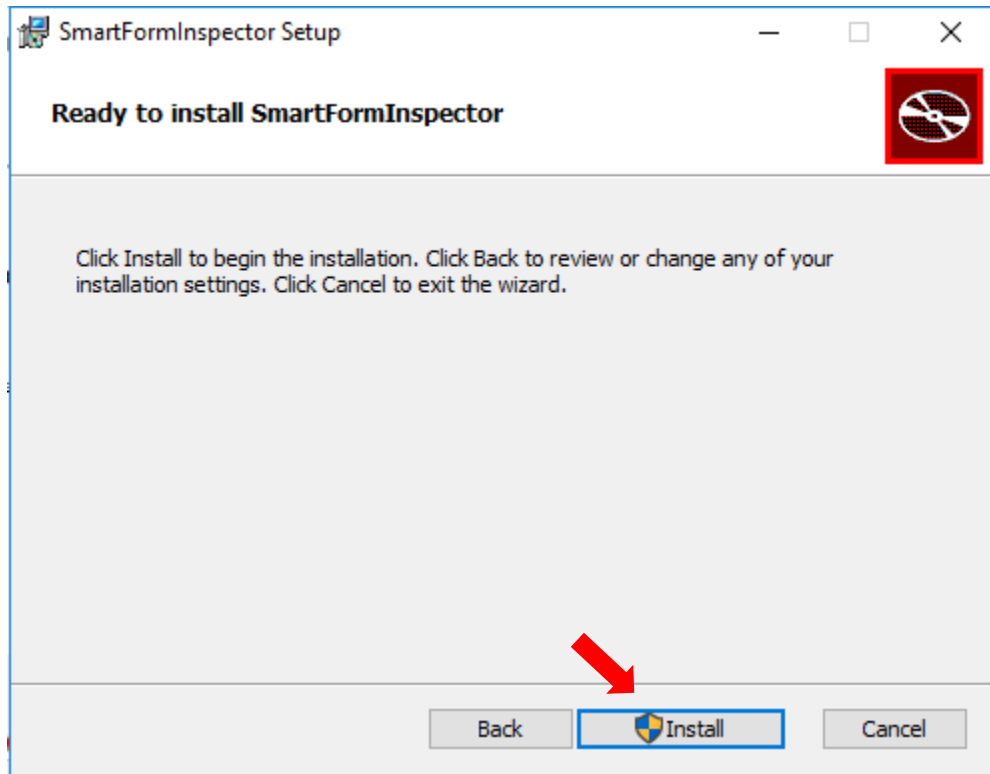




11. Click **Next**

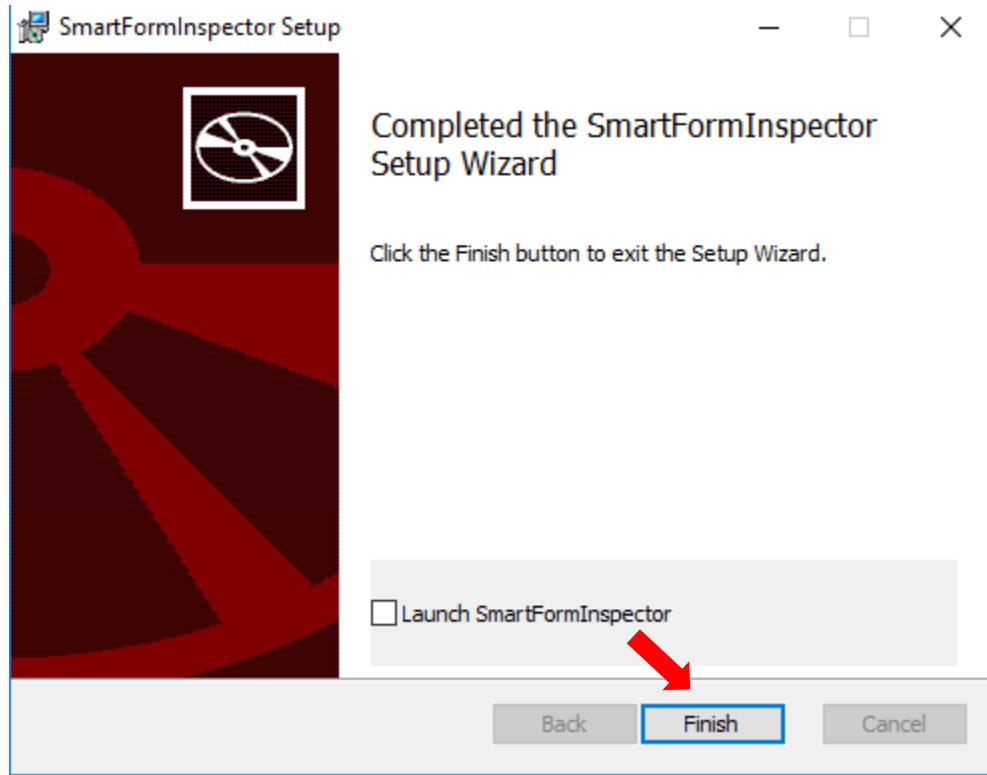


12. Click **Install** and wait until the installation is finished.





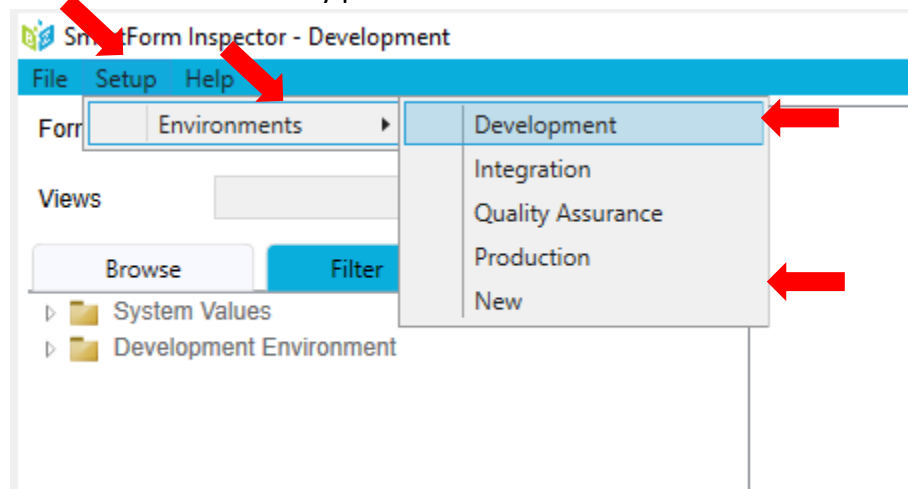
13. Click **Finish**.



Configure Connection to K2 Server

Before SmartForm Inspector you need to configure a connection to a K2 Server, as described below:

1. Launch SmartForm Inspector.
2. Click **Setup**→**Environment** and select any predefined environment or create **New**



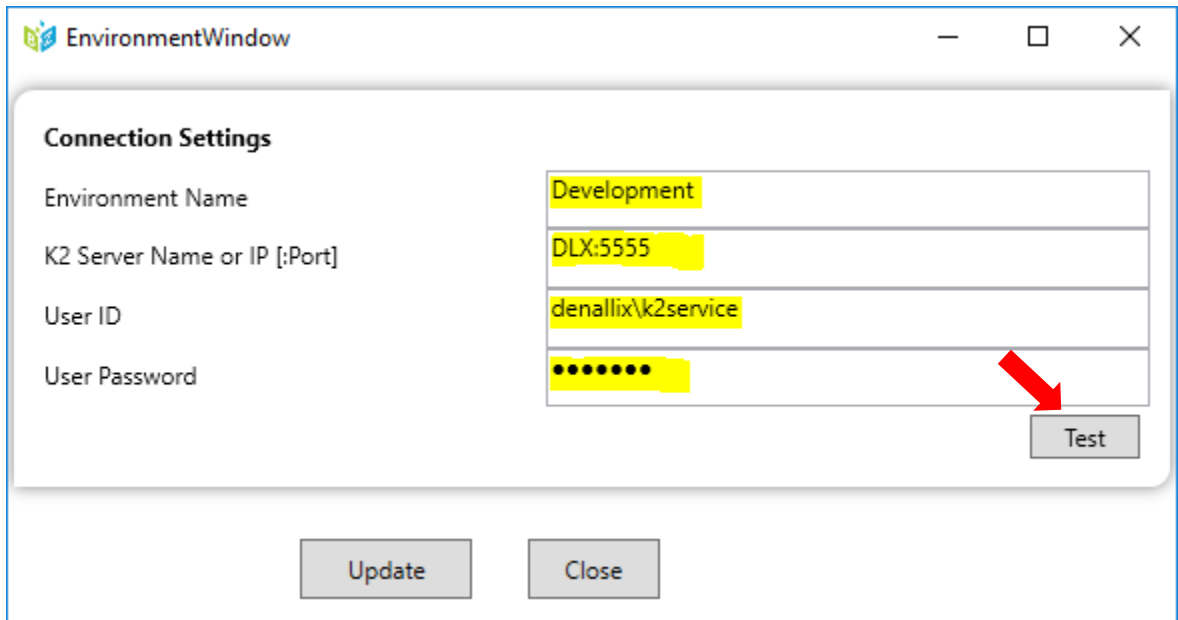


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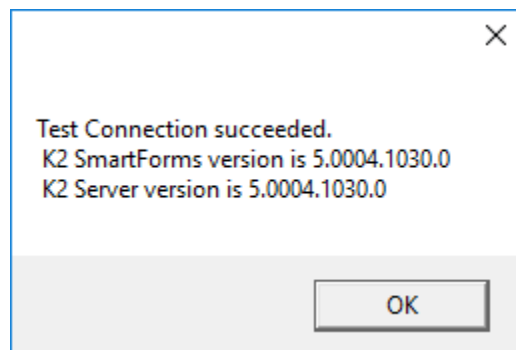
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3. In the Environment Window specify
 - Environment Name
 - K2 Server Name or IP [:Port]
 - User ID (This should be the user's Windows login)
 - User Password

And click **Test** to ensure that entered data is correct.

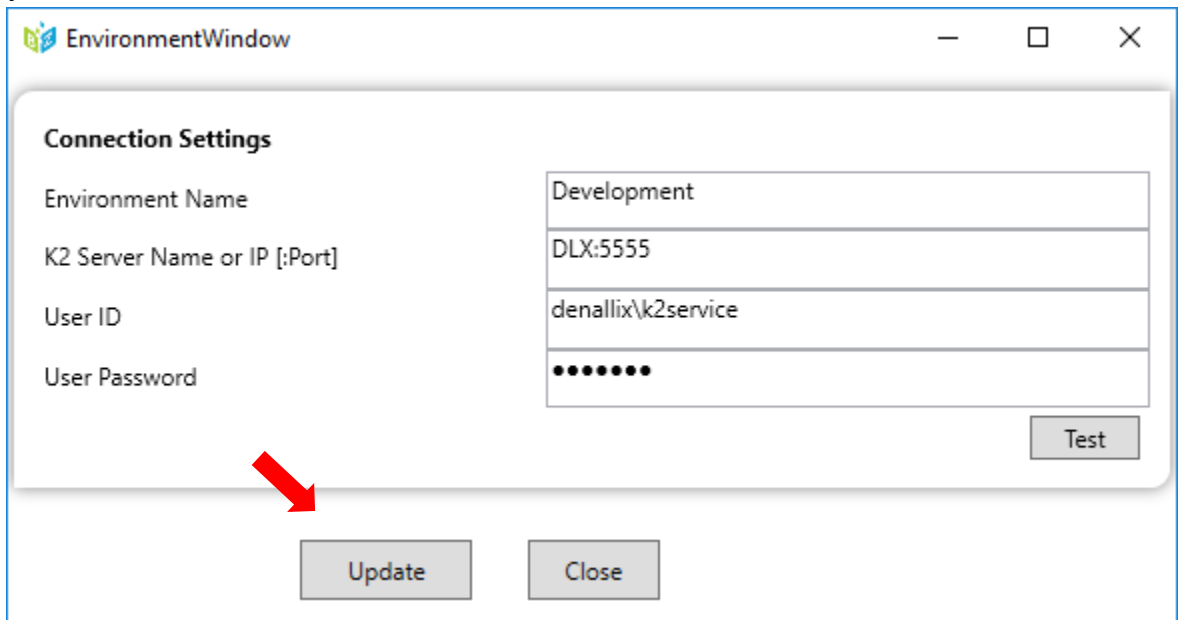


You should see message below that connection settings are correct otherwise provide correct data.





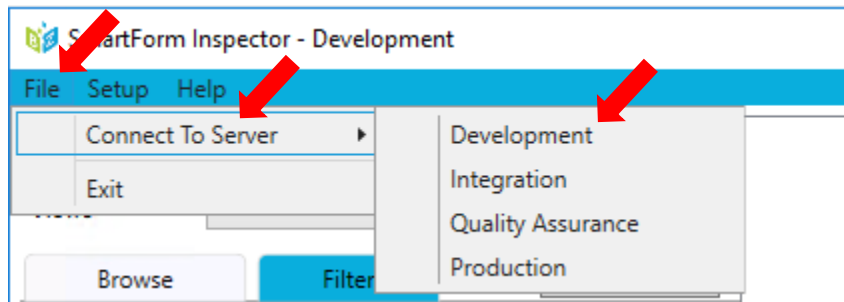
4. Click **Update**



Connecting to the server

After configuration step is completed you can start exploring the rules.

For this click **File**→**Connect to server** ->[Select configured server] as shown on the image below:



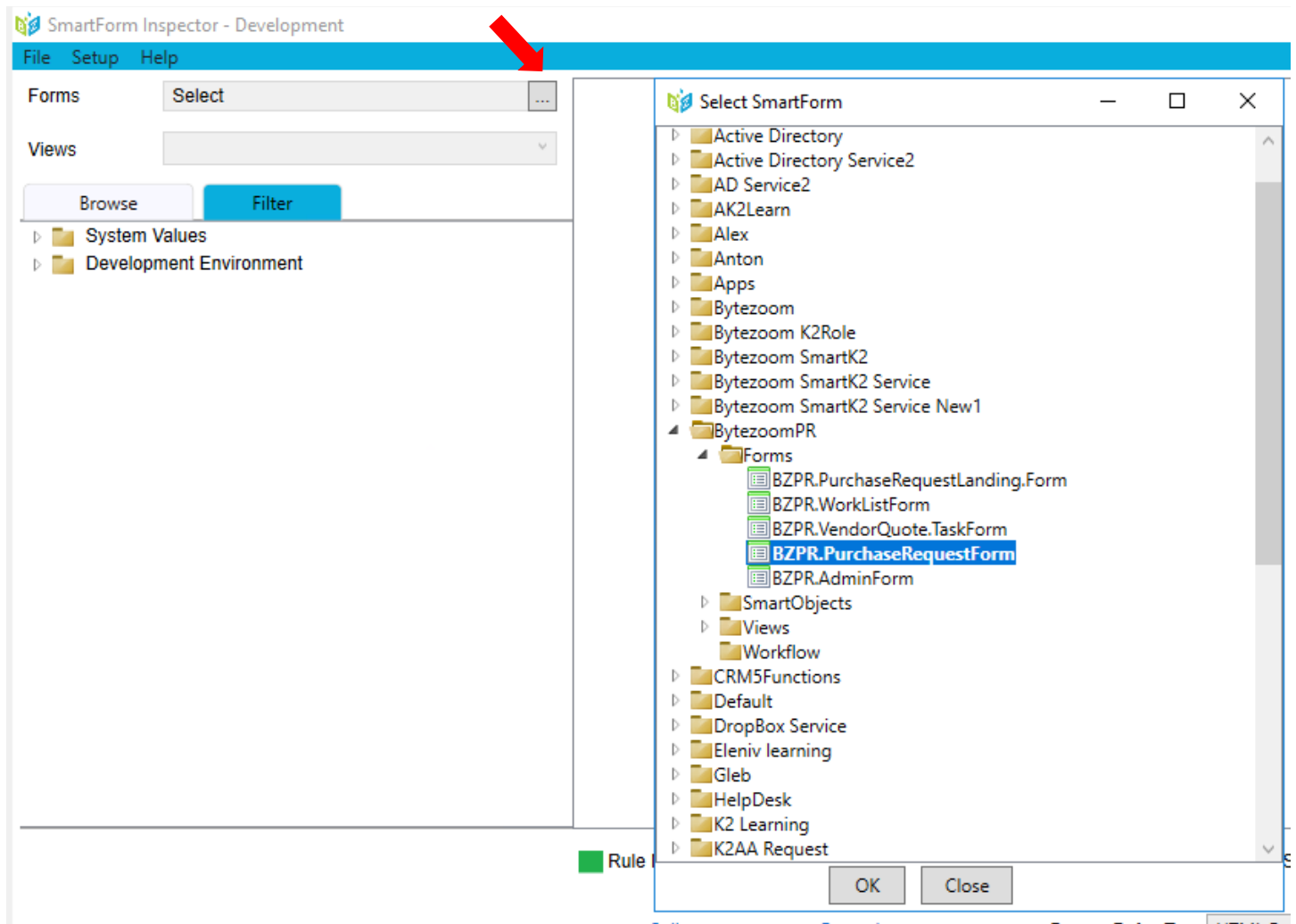


SmartForm Inspector for K2 Five

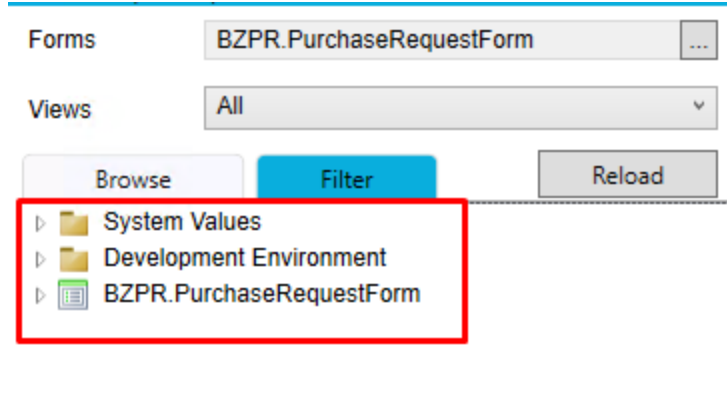
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Next click the ... button to select a form for inspecting.

In the opened window select a form and click **OK**.

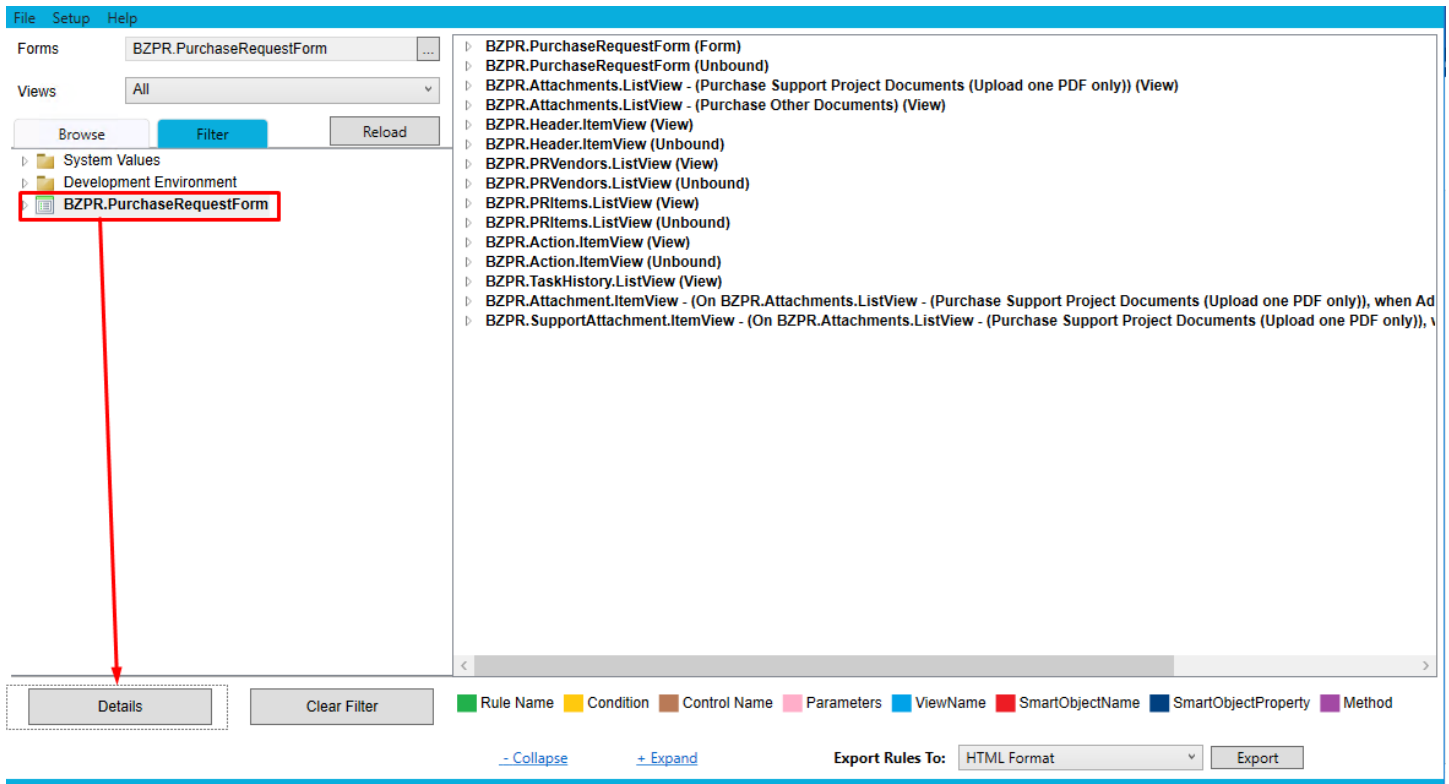


After this context of selected from will be loaded to the left panel.



Exploring SmartForm Rules








Select the form and click **Details**. It will load all the rules for form.



You can view what a rule consists of by clicking on the arrow to the left or by **double-clicking** the rule





- ▲ BZPR.PurchaseRequestForm (Form)
 - ▲  When the Form is Initializing
 - ▶ then complete the following one after another
 - ▲  if on BZPR.PurchaseRequestForm Form, PurchaseRequestId parameter has been specified
 - ▲  then transfer data
 - ▲ Input Mappings - (Action Definition)
 - PurchaseRequestId Data Label = PurchaseRequestId
 - ▶  When Save Button is Clicked
 - ▶  When Cancel Button is Clicked
 - ▶  When SendEmailToQuote Button is Clicked
 - ▶  When Button Submit is Clicked



You can also **Expand** or **Collapse** all rules by one level using corresponding buttons at the bottom of the application.

■ Rule Name ■ Condition ■ Control Name

- Collapse

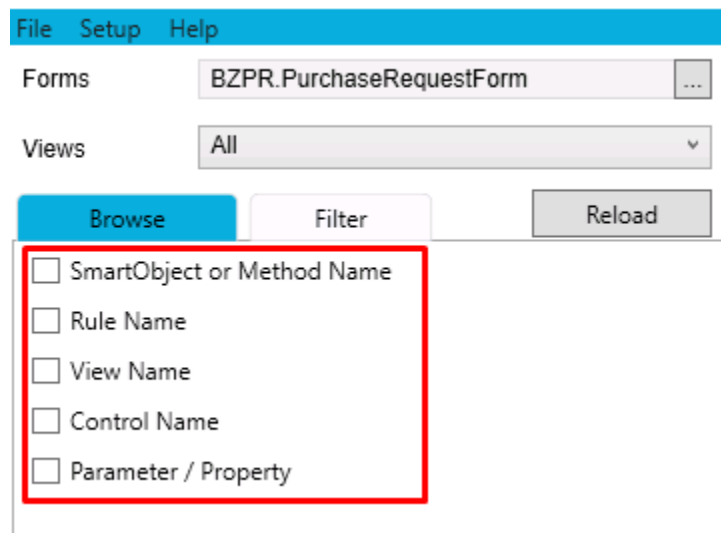
+ Expand

All K2 artifacts are colored for easy distinct. You can check which color corresponds to which at the bottom of the program.

■ Rule Name ■ Condition ■ Control Name ■ Parameters ■ ViewName ■ SmartObjectName ■ SmartObjectProperty ■ Method

Using the Filter

Select filter tab, you will see 5 filtering methods.





SmartObject or Method Name

Select “SmartObject Or Method Name”, select SmartObjects and Methods and click Details. SFI will show all the Rules where your chosen SmartObject Or Method is used.

The screenshot shows the SmartForm Inspector interface. On the left, there are filters for Forms (BZPR.PurchaseRequestForm) and Views (All). Below these are buttons for Browse, Filter, and Reload. A list of filter options is shown, with "SmartObject or Method Name" selected. Underneath, there are sections for SmartObjects (BZPR.PRVendors.Smo) and Methods (All). At the bottom left, a "Details" button is highlighted. On the right, a tree view shows the rule structure for "BZPR.PRVendors.ListView (Unbound)", including "SaveData - (BZPR.PRVendors.ListView)" and its associated actions: "for Added rows on BZPR.PRVendors.ListView List View", "for Changed rows on BZPR.PRVendors.ListView List View", and "for Removed rows on BZPR.PRVendors.ListView List View". A legend at the bottom right identifies colors for Rule Name (green), Condition (yellow), Control Name (brown), Parameters (pink), ViewName (blue), and SmartObjectN (red).



Rule Name

Select Rule Name, enter rule name in Search Keyword and click Details. SFI will show all the View, Rules where your chosen Rule Name is used.

The screenshot displays the SmartForm Inspector interface. At the top, there is a menu bar with 'File', 'Setup', and 'Help'. Below it, the 'Forms' dropdown is set to 'BZPR.PurchaseRequestForm' and 'Views' is set to 'All'. There are buttons for 'Browse', 'Filter', and 'Reload'. A list of search filters is shown, with 'Rule Name' checked and highlighted by a red box. Below the filters is a 'Search Keyword' field containing 'SaveForm', also highlighted by a red box. At the bottom left, a 'Details' button is highlighted by a red box. On the right side, a tree view shows the rule structure for 'BZPR.PurchaseRequestForm (Form)'. The tree is expanded to show three 'When' conditions: 'When Save Button is Clicked', 'When SendEmailToQuote Button is Clicked', and 'When Button Submit is Clicked'. Each condition lists several actions, including 'then execute the SaveForm rule', 'then show a message to the user', and 'then execute the NavigateToLandingForm rule'. The 'SaveForm' rule name is highlighted in yellow in the original image. At the bottom right, a legend identifies the colors used in the tree view: green for Rule Name, yellow for Condition, brown for Control Name, pink for Parameters, blue for ViewName, and red for an unlabeled category.



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View Name

Select View Name, enter view name in Search Keyword and click Details. SFI will show all the View, Rules where your chosen View Name is used.

The screenshot shows the SmartForm Inspector interface. On the left, the 'Forms' dropdown is set to 'BZPR.PurchaseRequestForm' and 'Views' is set to 'All'. The 'View Name' checkbox is checked. The 'Search Keyword' field contains 'Header'. The 'Details' button is highlighted. The main pane displays a tree view of rules and views, with a red box highlighting the search results. A legend at the bottom identifies the colors used in the tree view.

File Setup Help

Forms: BZPR.PurchaseRequestForm

Views: All

Browse Filter Reload

SmartObject or Method Name

Rule Name

View Name

Control Name

Parameter / Property

Search Keyword: Header

Details Clear Filter

Legend: Rule Name (Green), Condition (Yellow), Control Name (Brown), Parameters (Pink), ViewName (Blue), SmartObjectName (Red), SmartObjec (Dark Blue)

- BZPR.PurchaseRequestForm (Form)
 - When the Form is Initializing
 - then complete the following one after another
 - then on BZPR.PR.Vendors.ListView View, execute the Initialize method
 - then on BZPR.PR.Items.ListView View, execute the Initialize method
 - then on BZPR.Header.ItemView View, execute the Initialize method
 - if on BZPR.PurchaseRequestForm Form, PurchaseRequestId parameter has been specified
 - then complete the following one after another
- BZPR.PurchaseRequestForm (Unbound)
 - CreateNewRequest
 - if an advanced condition is true [PurchaseRequestId <= 0 Or PurchaseRequestId = ""]
 - then complete the following one after another
 - then on BZPR.Header.ItemView View, execute the Create method
 - then transfer data
- BZPR.Header.ItemView (View)
 - When BZPR.Header.ItemView executed Initialize
 - then complete the following one after another
 - then on BZPR.Header.ItemView View, populate Department Drop-Down List with data
 - then transfer data
 - then execute the LoadData - (BZPR.Header.ItemView) rule
- BZPR.Header.ItemView (Unbound)
 - SaveData - (BZPR.Header.ItemView)
 - if on View BZPR.Header.ItemView, view parameter PurchaseRequestId has been specified
 - then on BZPR.Header.ItemView View, execute the Update method
 - else
 - then on BZPR.Header.ItemView View, execute the Create method
 - LoadData - (BZPR.Header.ItemView)
 - if on View BZPR.Header.ItemView, view parameter PurchaseRequestId has been specified
 - then on BZPR.Header.ItemView View, execute the Read method



Control Name

Select Control Name, enter view name in Search Keyword and click Details. SFI will show all the Form, View, Rules where your chosen Control Name is used.

Forms: BZPR.PurchaseRequestForm

Views: All

Browse Filter Reload

- SmartObject or Method Name
- Rule Name
- View Name
- Control Name
- Parameter / Property

Search Keyword
Id Data Label

Details Clear Filter

```
▲ BZPR.PurchaseRequestForm (Form)
  ▲ When the Form is Initializing
    ▸ then complete the following one after another
      ▲ if on BZPR.PurchaseRequestForm Form, PurchaseRequestId parameter has been specified
        ▲ then transfer data
          ▲ Input Mappings - (Action Definition)
            PurchaseRequestId Data Label = PurchaseRequestId
        ▸ then complete the following one after another
      ▲ BZPR.PurchaseRequestForm (Unbound)
        ▲ SaveForm
          ▸ then complete the following one after another
            then execute the SaveData - (BZPR.Header.ItemView) rule
          ▲ then transfer data
            ▲ Input Mappings - (Action Definition)
              PurchaseRequestId = PurchaseRequestId Data Label
            then execute the SaveData - (BZPR.PR.Vendors.ListView) rule
            then execute the SaveData - (BZPR.PR.Items.ListView) rule
          ▲ CreateNewRequest
            ▲ if an advanced condition is true [PurchaseRequestId <= 0 Or PurchaseRequestId = ""]
              ▸ then complete the following one after another
                then on BZPR.Header.ItemView View, execute the Create method
                  ▸ Input Mappings - (Action Definition)
                  ▲ Output Mappings - (Action Definition)
                    PurchaseRequestId Data Label = Id
                then transfer data
                  ▲ Input Mappings - (Action Definition)
                    PurchaseRequestId = PurchaseRequestId Data Label
            ▲ StartVendorWorkflow
              then on CopyPRItemsForEachVendor.Smo SmartObject, execute its Execute method
                ▲ Input Mappings - (Action Definition)
                  PurchaseRequestId = PurchaseRequestId Data Label
```

Legend: Rule Name (Green), Condition (Yellow), Control Name (Brown), Parameters (Pink), ViewName (Blue), SmartObjectName (Red), SmartObject (Dark Blue)



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Parameter/Property

Select Parameter/Property, enter view name in Search Keyword and click Details. SFI will show all the Form, View, Rules where your chosen Parameter/Property is used.

The screenshot displays the SmartForm Inspector interface. On the left, the 'Forms' dropdown is set to 'BZPR.PurchaseRequestForm' and 'Views' is set to 'All'. The 'Filter' section has 'Parameter / Property' checked. The 'Search Keyword' field contains 'RequestID'. The 'Details' button is highlighted. The main pane shows a tree view of rules for 'BZPR.PurchaseRequestForm (Form)'. The tree is expanded to show the 'When the Form is Initializing' rule, which contains several sub-rules. The 'RequestID' parameter is highlighted in yellow throughout the tree, indicating its usage in various views and conditions. A legend at the bottom identifies the colors used for different rule components: Rule Name (green), Condition (yellow), Control Name (brown), Parameters (pink), ViewName (blue), SmartObjectName (red), SmartObjectProperty (dark blue), and Method (purple).

```
graph TD
    Root[BZPR.PurchaseRequestForm (Form)]
    Root --> Rule1[When the Form is Initializing]
    Rule1 --> SubRule1[then complete the following one after another]
    SubRule1 --> SubRule1_1[then on BZPR.PR VENDORS.ListView View, execute the Initialize method]
    SubRule1 --> SubRule1_2[then on BZPR.PR ITEMS.ListView View, execute the Initialize method]
    SubRule1 --> SubRule1_3[then on BZPR.Header.ItemView View, execute the Initialize method]
    SubRule1 --> SubRule1_4[if on BZPR.PurchaseRequestForm Form, PurchaseRequestID parameter has been specified]
    SubRule1 --> SubRule1_5[then complete the following one after another]
    SubRule1_5 --> SubRule1_5_1[then on BZPR.Attachments.ListView - (Purchase Support Project Documents (Upload one PDF only)) View, execute the Initialize method]
    SubRule1_5 --> SubRule1_5_2[then on BZPR.Attachments.ListView - (Purchase Other Documents) View, execute the Initialize method]
    SubRule1_5 --> SubRule1_5_3[then on BZPR.Action.ItemView View, execute the Initialize method]
    SubRule1_5 --> SubRule1_5_4[then on BZPR.TaskHistory.ListView View, execute the Initialize method]
    SubRule1_5 --> SubRule1_5_5[then execute the formruleShow/Hide rule]
```



Export Rules

You can export rules to HTML Format or XML Format.

Select a format to export and click export.

The screenshot shows the SmartForm Inspector - Development application window. The main area displays a tree view of rules for the form 'BZPR.PurchaseRequestForm'. The rules list includes various views and items, such as 'BZPR.PurchaseRequestForm (Form)', 'BZPR.PurchaseRequestForm (Unbound)', 'BZPR.Attachments.ListView - (Purchase Support Project Documents (Upload one PDF only)) (View)', and 'BZPR.SupportAttachment.ItemView - (On BZPR.Attachments.ListView - (Purchase Support Project Documents (Upload one PDF only)))'. At the bottom of the window, there is a legend for rule components: Rule Name (green), Condition (yellow), Control Name (brown), Parameters (pink), ViewName (blue), SmartObjectName (red), SmartObjectProperty (dark blue), and Method (purple). Below the legend, there are buttons for '- Collapse' and '+ Expand'. The 'Export Rules To:' dropdown menu is open, showing options for 'HTML Format' and 'XML Format'. The 'Export' button is also visible.

You can open the document immediately or later.



HTML Document

The exported document is stored at the address C:\Users\UserName\Documents\SmartFormInspector\Exported to HTML\

SmartFormInspector - Development Select Level : Select ▾

Form Name : BZPR.PurchaseRequestForm View Name : All

- System Values
 - Current Date
 - Current Date and Time
 - Current Date
 - Current Time
 - Current User
 - FQN
 - DisplayName
 - Name
 - Description
 - Email
 - Manager
 - Client
 - Screen Height
 - Screen Width
 - Platform
 - User Agent
 - Browser Culture
 - Error
 - Error Message
 - Error Details
 - Error Type
 - Mode
- Development Environment
 - Category Object Server
 - Category Server
 - Integrated=True
 - IsPrimaryLogin=True
 - Authenticate=True
 - EncryptedPassword=False
 - Host=k2.denallix.com
 - Port=5555
 - Mail Server
 - From Address
 - k2service@denallix.com
 - Mail Server (default)
 - dx.denallix.com
 - Miscellaneous Field
 - BZauth0SecurityProvider ClientID
 - BZauth0SecurityProvider ClientSecret
 - BZauth0SecurityProvider Domain
 - BZauth0SecurityProvider LicenseKey
 - BZauth0SecurityProvider MachineKey

- BZPR.PurchaseRequestForm (Form)
 - When the Form is Initializing
 - then complete the following one after another
 - then on BZPR.PRVendors.ListView View, execute the Initialize method
 - Input Mappings - (Action Definition)
 - PurchaseRequestId = PurchaseRequestId
 - then on BZPR.PRItems.ListView View, execute the Initialize method
 - Input Mappings - (Action Definition)
 - PurchaseRequestId = PurchaseRequestId
 - then on BZPR.Header.ItemView View, execute the Initialize method
 - Input Mappings - (Action Definition)
 - PurchaseRequestId = PurchaseRequestId
 - if on BZPR.PurchaseRequestForm Form, PurchaseRequestId parameter has been specified
 - then transfer data
 - Input Mappings - (Action Definition)
 - PurchaseRequestId Data Label = PurchaseRequestId
 - then complete the following one after another
 - then on BZPR.Attachments.ListView - (Purchase Support Project Documents (Upload one PDF only)) View, execute the Initialize method
 - Input Mappings - (Action Definition)
 - PurchaseRequestId = PurchaseRequestId
 - pType = Support Documents
 - then on BZPR.Attachments.ListView - (Purchase Other Documents) View, execute the Initialize method
 - Input Mappings - (Action Definition)
 - PurchaseRequestId = PurchaseRequestId
 - pType = Other Documents
 - then on BZPR.Action.ItemView View, execute the Initialize method
 - Input Mappings - (Action Definition)
 - SN = SN
 - then on BZPR.TaskHistory.ListView View, execute the Initialize method
 - Input Mappings - (Action Definition)
 - requestID = PurchaseRequestId
 - then execute the formruleShow/Hide rule
 - When Save Button is Clicked
 - then complete the following one after another
 - then execute the SaveForm rule
 - then show a message to the user
 - Properties - (Action Definition)
 - BodysLiteral = False
 - Input Mappings - (Action Definition)
 - Size = small
 - Type = message
 - Body = Purchase Request Form Saved successfully!!
 - then execute the NavigateToLandingForm rule
 - When Cancel Button is Clicked
 - then execute the NavigateToLandingForm rule
 - When SendEmailToQuote Button is Clicked ..



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XML Document

The exported file is stored at: C:\Users\UserName\Documents\SmartFormInspector\Exported to XML\

```
<?xml version="1.0" encoding="UTF-8"?>
- <SFIItems version="1.3.1.5">
  - <MenuItems>
    - <Item id="1bda9ded-b8f9-404d-a8d9-801a195d16f9" type="EnvironmentFieldCollection">
      Development Environment
      - <Item id="19dd6103-95a9-4f3a-88cf-7895642fe10b" type="EnvironmentFieldType">
        Category Object Server
        - <Item id="ddcda95b-b645-45ce-b21a-b1b7e78fb8ac" type="EnvironmentFieldName">
          Category Server
          <Item type="EnvironmentFieldValue">Integrated=True </Item>
          <Item type="EnvironmentFieldValue">IsPrimaryLogin=True </Item>
          <Item type="EnvironmentFieldValue">Authenticate=True </Item>
          <Item type="EnvironmentFieldValue">EncryptedPassword=False </Item>
          <Item type="EnvironmentFieldValue">Host=k2.denallix.com </Item>
          <Item type="EnvironmentFieldValue">Port=5555 </Item>
        </Item>
      </Item>
    - <Item id="2e9e9157-e34a-4891-ab65-03bdcbfc2cb8" type="EnvironmentFieldType">
      Mail Server
      - <Item id="a9616dde-ed8a-4d77-b641-26adbe5e80dd" type="EnvironmentFieldName">
        From Address
        <Item type="EnvironmentFieldValue">k2service@denallix.com </Item>
      </Item>
      - <Item id="7815c2a4-6456-4fd2-b012-713107280d37" type="EnvironmentFieldName">
        Mail Server (default)
        <Item type="EnvironmentFieldValue">dlx.denallix.com </Item>
      </Item>
    - <Item id="fb213825-7355-4599-b948-4e3466cfd830" type="EnvironmentFieldType">
      Miscellaneous Field
      - <Item id="68a24e5f-f752-4177-83ba-f0139cf270b1" type="EnvironmentFieldName">
        BZauth0SecurityProvider ClientID
        <Item type="EnvironmentFieldValue"> </Item>
      </Item>
      - <Item id="e53fe08f-77d2-4423-89ad-cc6b65eb35f7" type="EnvironmentFieldName">
        BZauth0SecurityProvider ClientSecret
        <Item type="EnvironmentFieldValue"> </Item>
      </Item>
      - <Item id="bceb34d6-35b0-4192-930f-4db0afbbdf90" type="EnvironmentFieldName">
        BZauth0SecurityProvider Domain
        <Item type="EnvironmentFieldValue"> </Item>
      </Item>
      - <Item id="eb357fa7-129f-4b7b-90d8-dc1249fb1b11" type="EnvironmentFieldName">
        BZauth0SecurityProvider LicenseKey
        <Item type="EnvironmentFieldValue"> </Item>
      </Item>
      - <Item id="f5bbf52e-f86a-46f3-8a8c-d7182bd29150" type="EnvironmentFieldName">
        BZauth0SecurityProvider MachineKey
        <Item type="EnvironmentFieldValue">7C29BF09B4D5BA44D9F7C4B73CF159D7 </Item>
      </Item>
      - <Item id="d0799f84-5c71-4a9e-b919-6b4e66003d20" type="EnvironmentFieldName">
        BZauth0SecurityProvider SecurityLabel
        <Item type="EnvironmentFieldValue"> </Item>
      </Item>
    </Item>
  </MenuItems>
</SFIItems>
```




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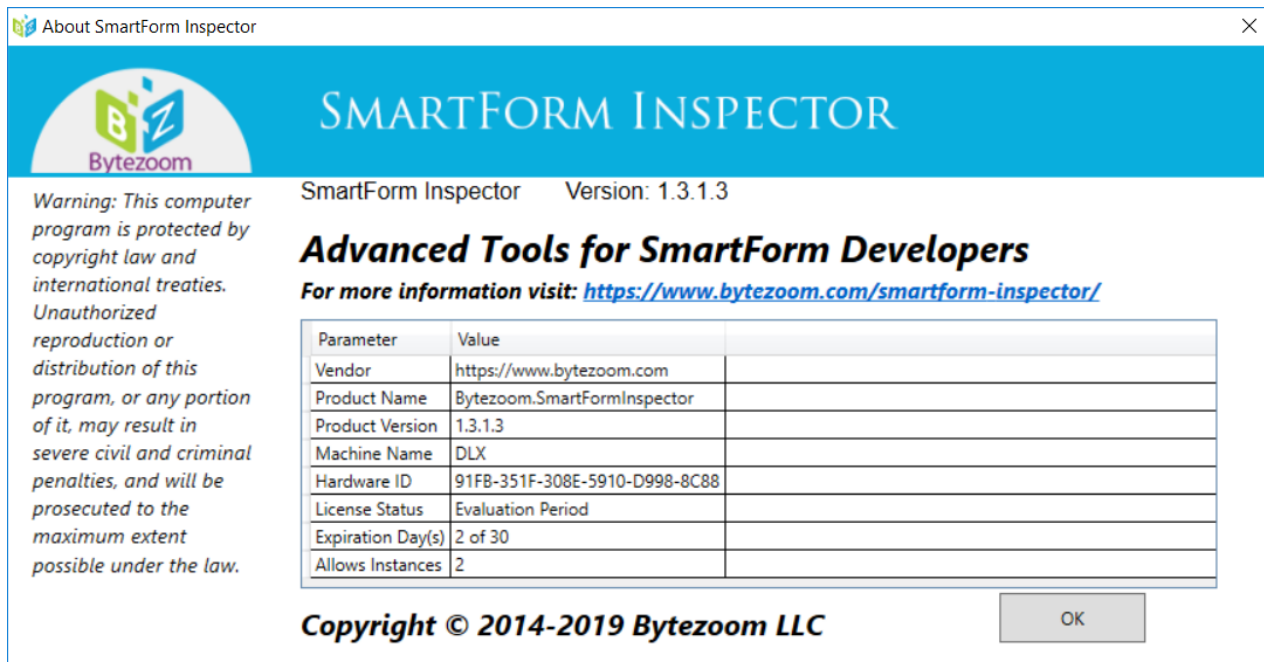
Licensing SmartForm Inspector

Bytezoom SmartForm Inspector Trial includes a free 30 day trial license. To continue using SmartForm Inspector beyond the initial 30 days, you need to purchase a permanent license. You can purchase a permanent license at:

<https://www.bytezoom.com/product/smartform-inspector/>

After purchasing a license

1. Run SmartForm Inspector
2. Click Help
3. Click About



4. Send the Machine Name and Hardware ID by email to info@bytezoom.com.
5. Receive a SFI.bzlic license file by email.
6. Copy a license file to SmartForm Inspector folder

SFI.bzlic

To:

C:\Program Files (x86)\Bytezoom\SmartFormInspector

Bytezoom LLC
 3307 Evergreen Way, #707 PMB 139
 Washougal, WA 98671
 Telephone: +1-866-888-9556
 Fax: 866-868-5550
 Email: Info@bytezoom.com
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