

VIKE FORMS

Installation and Settings

Abstract

Installation and general settings guidelines to provision Vike Forms solution into your SharePoint Online environment.

Vike Solutions
<https://vikesolutions.com>

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Provisioning Vike Forms

Download and add the Vike Forms Solution Add-In to Your SharePoint Tenant App Catalog

- Navigate to your **App Catalog site** → **Apps for SharePoint** library and upload the **Vike Forms for SharePoint Add-In** package. *Note: The version number may differ depending on the latest release available for download.*

Product ID : {} (1)

	Vike Forms for SharePoint	VikeFormsSolutions	...	1.0.0.1	
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- Click **Deploy**.

Do you trust Vike Forms for SharePoint?



The client-side solution you are about to deploy contains full trust client side code. The components in the solution can, and usually do, run in full trust, and no resource usage restrictions are placed on them.

This client side solution will get content from the following domains:

SharePoint Online

Please go to the API Management Page to approve pending permissions. These are the permissions that need to be reviewed: 9592c710-d81c-498f-b82c-d4621ab886fc, access_as_user; Microsoft Flow Service, Flows.Read.All



Vike Forms for SharePoint

Deploy

Cancel

API permissions requested by this solution

Resource	Scope	Purpose
VikeSolutionsAPI (9592c710-d81c-498f-b82c-d4621ab886fc)	access_as_user	Delegated access used to validate the organization's license status for this solution.
Microsoft Flow Service	Flows.Read.All	Delegated, read-only access to Power Automate's flow listing API.

- Both permissions are delegated — the solution only ever acts with the current signed-in user's own access, with no independent or background access of its own.
- Microsoft Flow Service is a Microsoft service principal used to read flow details in the target environment.
- Approving these permissions grants nothing beyond what each user already has individually, as determined by their existing Power Automate and Dataverse access.

Setup step for admins

After deploying the app, a Global Administrator or Application Administrator must visit the [Admin consent URL](#) in the same tenant and accept the consent prompt, before approving the pending API permission for this app in SharePoint Admin Center → API access. This creates the required service connection for license verification.

Note: The app checks license status no more than once every 24 hours. This check only occurs while the app is being used by a signed-in person — there is no background or scheduled process, consistent with the delegated (not application-level) nature of this permission. This is a periodic health-check rather than a hard access-control gate; a temporary failure to reach the licensing service does not block use of the app. Each check transmits only the minimum information required to validate license status (i.e., the tenant identifier).



Permissions requested

Review for your organization

VikeSolutionsAPI

Vike Solutions 

This app would like to:

✓ Sign in and read user profile

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

Accepting these permissions means that you allow this app to use your data as specified in their [terms of service](#) and [privacy statement](#). You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Does this app look suspicious? [Report it here](#)

Cancel

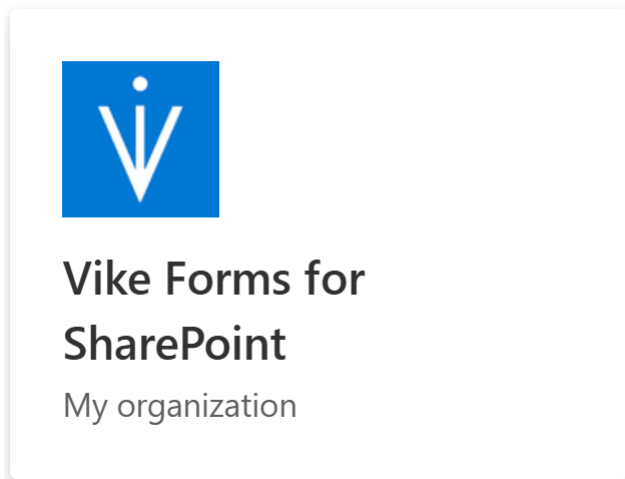
Accept

The admin consent screen also lists "Sign in and read user profile." This is the standard baseline permission automatically included with every Entra ID app registration's sign-in flow — it is not an additional, functionality-specific permission requested by this solution.

Add Vike Forms Solution to Target Site

In the target SharePoint site where you want to create and manage forms, add the **Vike Forms Solution** add-in:

Site Contents → Add an App → Vike Forms Solution



Once the app has been added to your SharePoint site, you can use the **Vike Form Designer**, **Vike Form**, and **Vike Form Grid** web parts, each suited to a specific purpose:



Vike Form
Designer



Vike Form



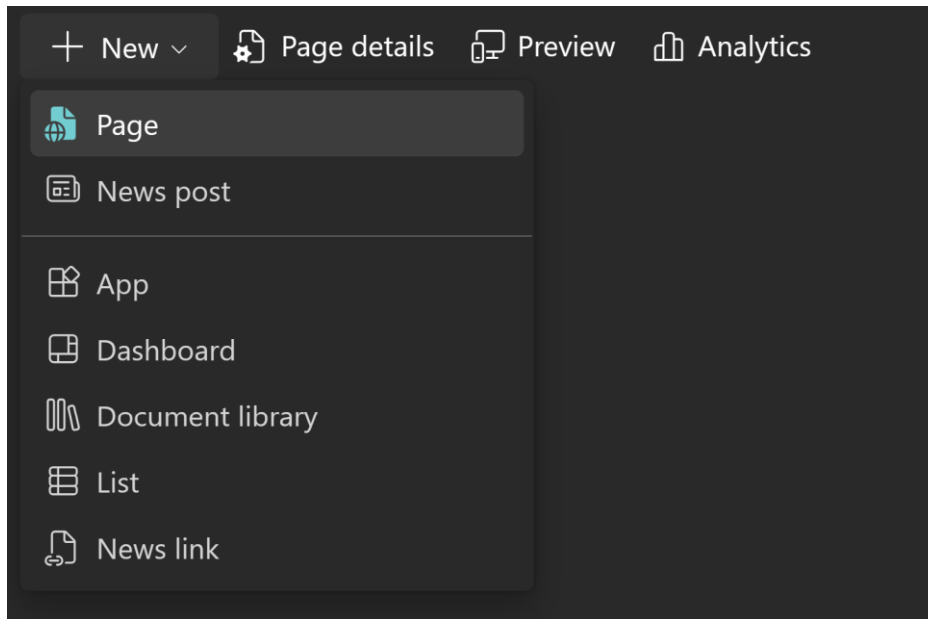
Vike Form
Grid

Web Part	Purpose	Required Permissions
Vike Form Designer	Design, save, and publish forms.	Edit permissions
Vike Form Grid	Perform full CRUD operations (create, read, update, delete) on list items through a published form. Includes additional layout options for managing data views.	Permission to manage lists and add/edit list items
Vike Form	A single-page data submission web part where users can visit and submit data through a published form.	Permission to manage lists and add/edit list items

All three web parts can be added either as a **full-width page app** (recommended) or as a **regular web part** on a target SharePoint page.

Add the App as a Full-Page App (Recommended)

1. From the SharePoint site **Home Page**, go to **New → Page**.



2. Select the app you want to add and click **Use this template**.

Full-page apps



Vike Form



Vike Form Designer



Vike Form Grid



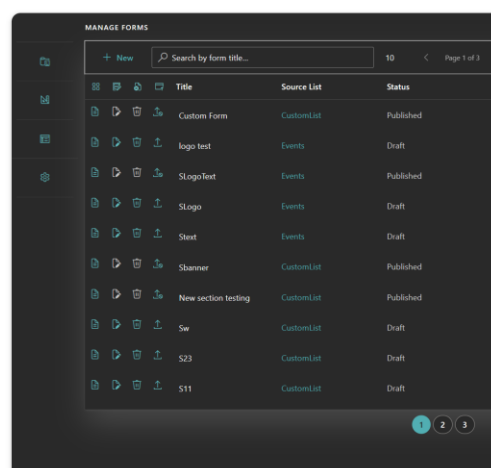
Vike Form Designer

Full-page apps

Description

Vike Form Designer to design, save and publish professional forms for SharePoint lists

Use this template | ▾



3. Set a title for the page and click **Save**.

Add the App to a SharePoint page

1. Edit a SharePoint page and click the **Add a new web part** button in the page section.
2. The Vike Form web parts are listed under the **Advanced** section.

Advanced



Code snippet



Dashboard



Embed



Kindle Instant
Preview



Markdown



Microsoft
PowerApps (...)



Vike Form



Vike Form
Designer



Vike Form Grid

Vike Form Designer

The Vike Form Designer enables site owners/admins to:

- Manage forms
- Design new forms
- Edit, publish, and unpublish forms
- Enable or disable list extensions

Left Navigation Buttons/Screens:

#	Screen	Description
1	Manage Forms	Manage all draft and published forms.
2	Form properties	Design a new form and open the properties pane during design.
3	List Extensions	Enable list extensions for custom (generic) lists.
4	Settings	General settings section for additional features to be added in the future. Paging values for grids can be configured here.

Manage Forms

The Manage Forms dashboard is where you manage all forms within the site. From here, you can review, edit, delete, publish, and unpublish forms, attach flows to the form, and set the final render size for a form.

- **Draft forms** — Saved forms remain in draft mode and can be edited by clicking the **Edit** button next to the form in the grid.
- **Published forms** — Published forms are not editable. To edit a published form, it must first be unpublished.

Forms can be searched by title, and paging and sorting are enabled by default. The number of items shown per page can be changed from the dropdown in the header section (the default paging value for all grids in the solution can be set in the [Settings](#) section).

MANAGE FORMS										
+ New 🔍 Search by form title... 10 < Page 1 of 2 >										
	📁	📄	🗑️	🔄	🔗	Title	Source List	Status	Created by	Modified by
	📄	📄	🗑️	🔄	🔗	Sections Demo	Employee onboarding	Published	Sunil Ubale	Sunil Ubale
	📄	📄	🗑️	🔄	🔗	Layouts Demo	Expense tracker	Draft	Sunil Ubale	Sunil Ubale
	📄	📄	🗑️	🔄	🔗	Header Type Demo	Environments	Published	Sunil Ubale	Sunil Ubale
	📄	📄	🗑️	🔄	🔗	Expense Tracker form	Expense tracker	Published	Sunil Ubale	Sunil Ubale
	📄	📄	🗑️	🔄	🔗	SectionRules	DemoList	Draft	Sunil Ubale	Sunil Ubale
	📄	📄	🗑️	🔄	🔗	RulesCheck	DemoList	Published	Sunil Ubale	Sunil Ubale
	📄	📄	🗑️	🔄	🔗	RemovedFields	DemoList	Published	Sunil Ubale	Sunil Ubale
	📄	📄	🗑️	🔄	🔗	AllFieldsSection Form	CustomList	Draft	Sunil Ubale	Sunil Ubale
	📄	📄	🗑️	🔄	🔗	AllFieldsForm	CustomList	Published	Sunil Ubale	Sunil Ubale
	📄	📄	🗑️	🔄	🔗	LogoText	DemoList	Published	Sunil Ubale	Sunil Ubale

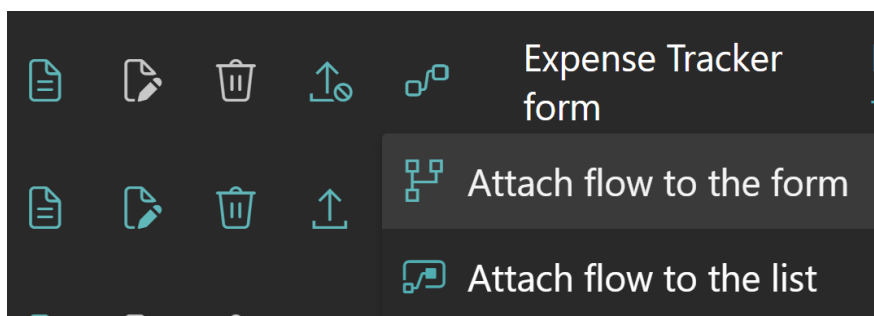
Attach Flows to Form

Flows can be linked to published forms through the **Attach flow to the form** functionality, allowing a Power Automate flow to run automatically when that form is submitted.

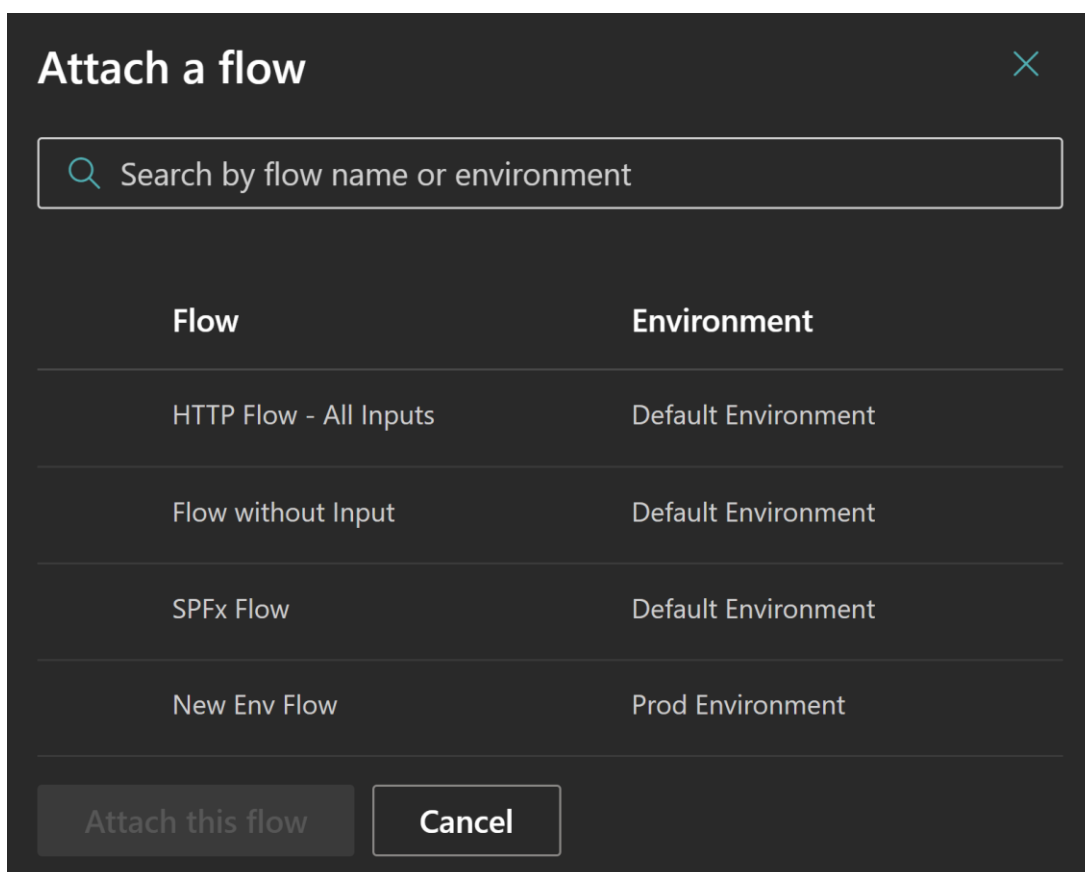
Note: the form's action menu also offers a separate **Attach flow to the list** option. This is unrelated to the custom feature and it simply navigates to the underlying SharePoint list, where flows can be attached through SharePoint's own native, built-in flow functionality.

Opening the Attach Flow dialog

From the form's action menu, select **Attach flow to the form**.



This opens the **Attach a flow** dialog, showing a searchable list of flows available to you, each shown alongside its environment's display name (as configured under Settings → Power Platform Environments).



Only flows with an HTTP request trigger (When an HTTP request is received) appear in this list — other trigger types cannot be invoked from a form submission and are not shown.

Selecting and mapping a flow

1. Use the search box, or scroll the list, to find the flow you want. Each row shows the flow's name and the environment it belongs to.
2. Click a row to select it — the selected flow is marked with a checkmark, and the **Attach this flow** button becomes enabled.

Attach a flow ✕

🔍 Search by flow name or environment

Flow	Environment
HTTP Flow - All Inputs	Default Environment
Flow without Input	Default Environment
☒ SPFx Flow	Default Environment
New Env Flow	Prod Environment

Attach this flowCancel

3. Click **Attach this flow**.
4. If the selected flow expects specific inputs, a **Map form fields to "[flow name]"** screen appears, listing each expected field. For each one, choose either:
 - **A form field** — select it from the dropdown, and the flow receives that field's value whenever the form is submitted, or

- **Static value** — the flow always receives the same fixed, manually entered value, regardless of what's entered on the form.

Attach a flow ✕

Map form fields to "SPFx Flow"

This flow expects the following inputs. Enter the form field name that supplies each one.

title * — expects string

Item (string) ▼

requestedBy * — expects string

Static value ▼

Enter a static value

priority — expects string

Static value ▼

Enter a static value

Save mapping and Attach

Back

5. Click **Save mapping and Attach** to confirm. (If the flow has no inputs to map, the attachment completes immediately after step 3.)

Viewing or changing an attached flow

Once a flow is attached, the dialog shows a **Currently attached** summary with the flow's name and environment, along with its input mapping. Hovering over the mapping summary shows the full field-by-field breakdown.

- To attach a different flow, select a new one and click **Attach this flow** (the button relabels to confirm the replacement).
- To remove the attachment entirely, click **Detach**.

Who can search and attach flows

This involves two separate checks — both matter, and they don't grant equivalent levels of access.

a. Which flows a logged in user actually sees

This is **not controlled by this app in any way**. The flow list is retrieved using each signed-in person's own individual Power Automate delegated token — the same identity and access they'd have if they opened `make.powerautomate.com` directly. Two different people opening the same picker, in the same environment, will see different flows, based entirely on their own Power Automate / Dataverse permissions, outside this app's control.

Visibility works differently depending on the flow's type — this distinction matters for anyone administering access.

Technical description

- **Standard (non-solution) cloud flows:** visibility follows Power Automate's classic sharing model — a person sees a flow if they are its owner, have been added as a co-owner, or have been granted "Run only" access (granted individually or to an AD-backed security group).
- **Solution-aware (Dataverse-backed) flows:** visibility follows **Dataverse security roles and business unit membership** within that environment — a structured, role-based authorization model, not a simple sharing list. A person sees a solution flow if they (directly, or via an AD-group-backed Dataverse team) hold a security role that grants access to the underlying workflow table — commonly bundled into broad-purpose roles such as Environment Maker (a Power Platform-level role) or Basic User / System Administrator (Dataverse-level roles), among others. Holding a role that merely grants visibility into the solution itself is not the same as holding a role that grants access to the workflow records inside it.
- **Both flow types are retrieved through the same API call** using the same delegated token, which can make the distinction easy to overlook — but the underlying authorization check behind that visibility is genuinely different per type, and is managed in different places

within Power Platform admin tooling (Power Automate's sharing dialog for standard flows; the Power Platform admin center's security role assignments for solution flows).

- **This API behaviour is not formally documented by Microsoft;** it has been determined through empirical testing in a live tenant. Organizations relying on this distinction for access decisions should verify current behaviour in their own tenant (e.g., testing with a user holding only a minimal role, such as Basic User with no other assignments, to confirm whether solution flows become visible) rather than treating this document as a permanent guarantee.

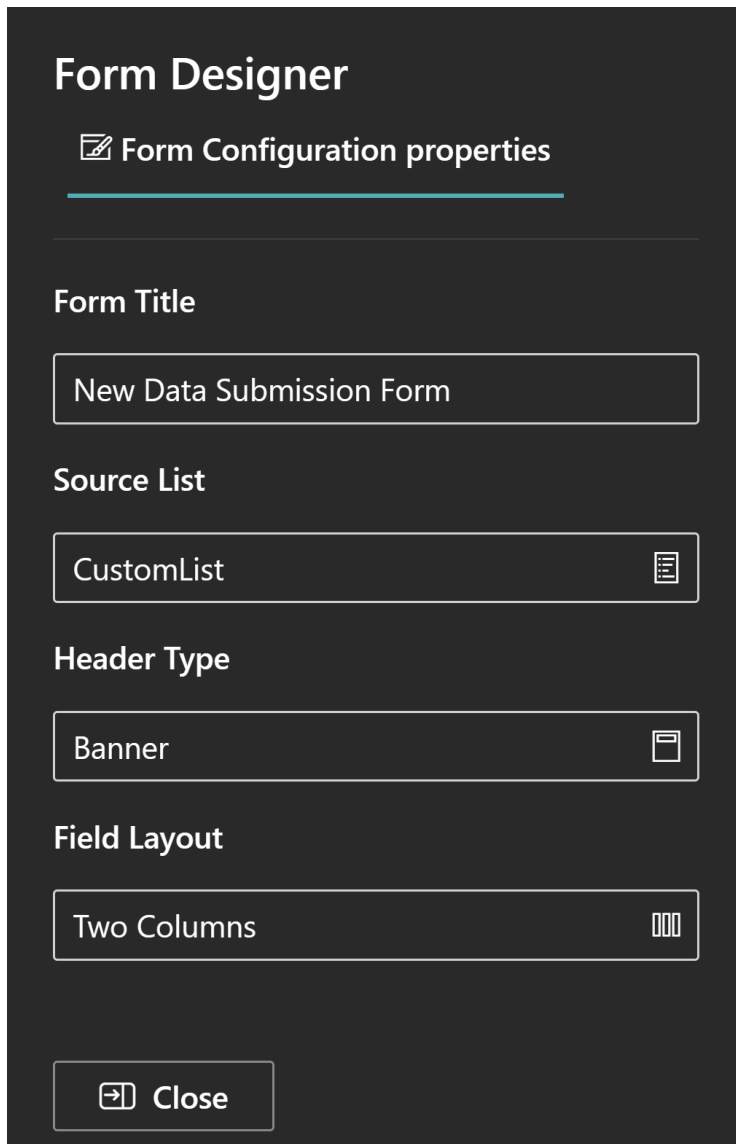
Who can run (trigger) an attached flow

it is governed entirely inside the flow itself, independent of SharePoint or this app.

Each flow's "When an HTTP request is received" trigger has its own security setting — either "Specific users in my tenant" or "Any user in my tenant." This is the real, final authorization boundary for execution.

Form properties

New forms are provisioned by configuring the form properties:

A dark-themed configuration panel titled "Form Designer". It contains several sections for configuring a form: "Form Configuration properties" (with a pencil icon and a blue underline), "Form Title" (with a text input field containing "New Data Submission Form"), "Source List" (with a dropdown menu showing "CustomList" and a list icon), "Header Type" (with a dropdown menu showing "Banner" and a header icon), "Field Layout" (with a dropdown menu showing "Two Columns" and a grid icon), and a "Close" button at the bottom left with a square icon.

Form Designer

 Form Configuration properties

Form Title

New Data Submission Form

Source List

CustomList 

Header Type

Banner 

Field Layout

Two Columns 

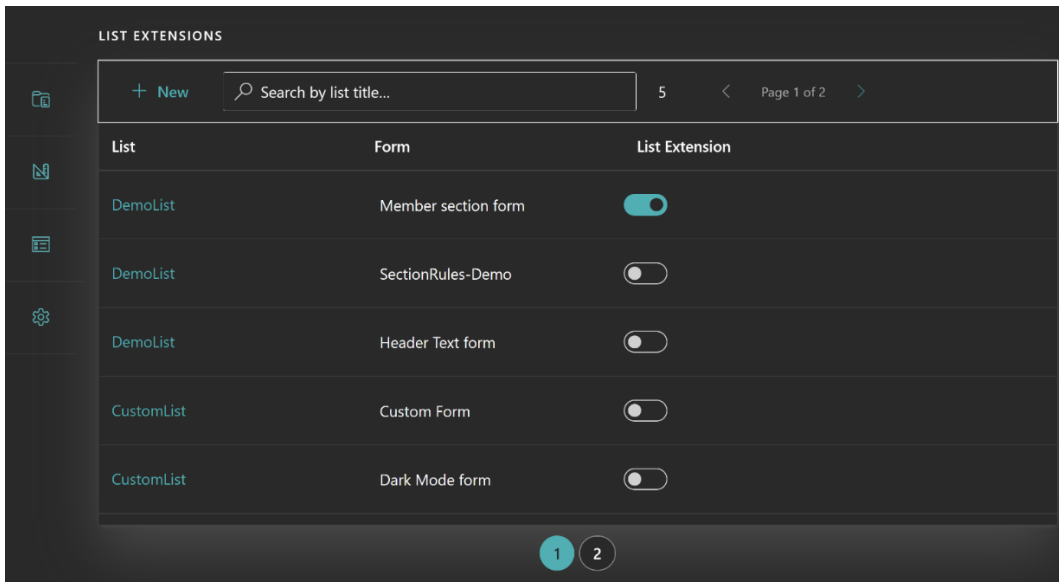
 Close

Detailed guidance on creating a new form and configuring styles, branding, borders, and rules can be found in the [Design New Form](#) section.

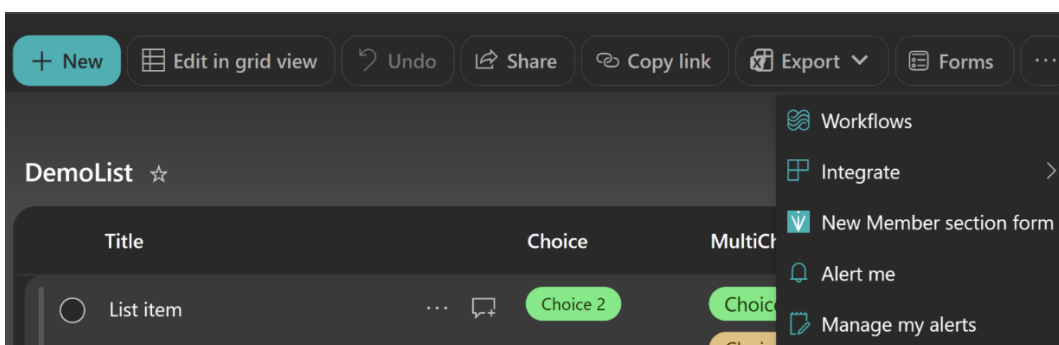
List extensions

List extensions allow users to open a published/linked form directly from the custom list's menu bar. Check the toggle button next to a form to enable the extension for that list.

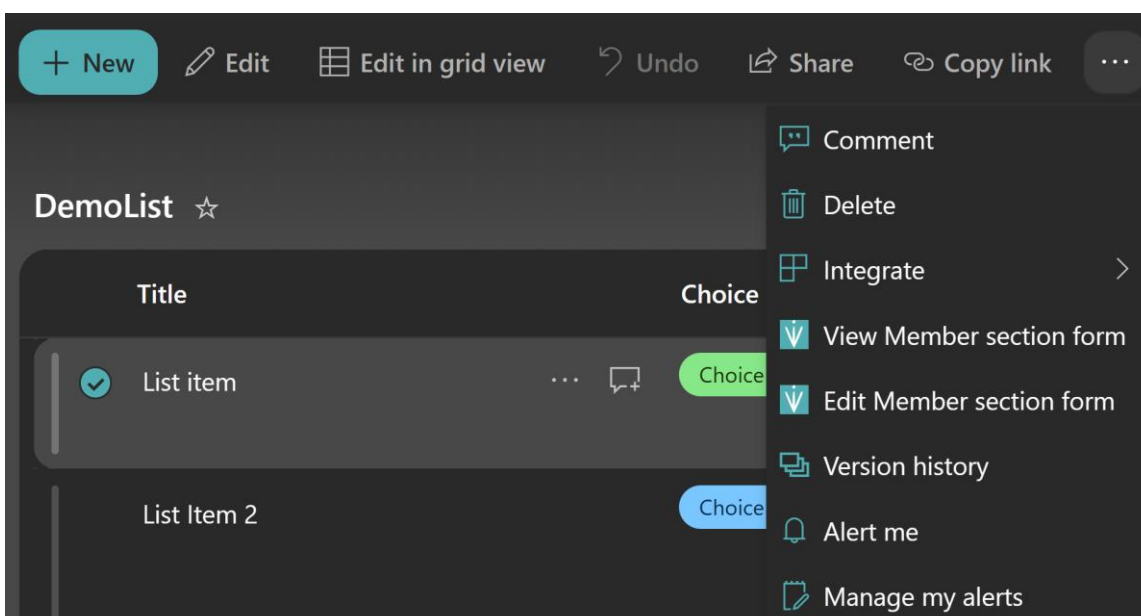
Note: List extensions are currently supported only in the Modern experience and for custom (generic) lists — not for default list types such as Announcements, Events, or Contacts.



When the extension is enabled, a **New [Form Title]** button with the Vike logo is added to the list toolbar. Clicking it opens a new item in the linked form.



When an item is selected from the list view, **View [Form Title]** and **Edit [Form Title]** buttons with the Vike logo appear in the toolbar. These open the list item in display or edit mode, respectively, within the linked form.



Settings

The App Settings section controls features activated at the site level. The following settings can be configured on this page:

- **Items per page** — paging values for grids used in the application.
- **Power Platform Environments** — the Power Platform environments to search for flow attachment, each identified by its environment ID and a friendly display name.
- **Remove app data** — permanently deletes the app's SharePoint lists and data from this site. This only affects the current site; if the app is installed on other sites, this must be repeated on each one. Skip this step if you plan to reinstall later and want to keep existing data.

APP SETTINGS

Tenant Id

[REDACTED]

License

Active

Items per page

10

Power Platform Environments

Title	Display Name	Actions
[REDACTED]	Prod Environment	
[REDACTED]	Default Environment	

+ Add Environment

Remove app data

Run this before removing the app if you want its data deleted. This only affects **this site**. If the app is installed on other sites, repeat these steps on each one. If you plan to reinstall later and keep your data, skip this step.

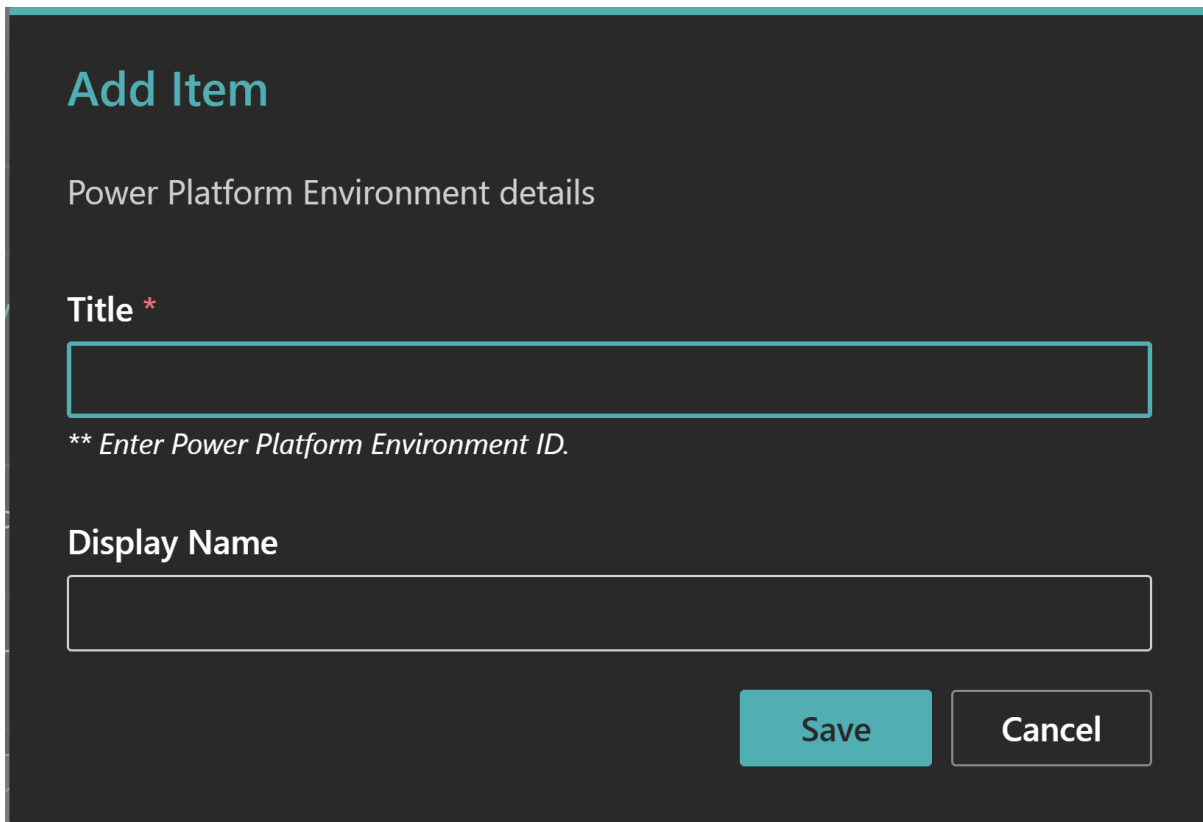
Remove app data

Configure Power platform environments

Flows are only searchable within environments that have been explicitly added here - this is a manually maintained list, not an automatically generated.

To add an environment:

1. Click **Add Environment**.
2. In the **Title** field, enter the environment's ID — found in the Power Platform admin center, under the environment's details. The default environment's ID is typically formatted as Default-<tenant-GUID> (e.g., Default-00000000-0000-0000-0000-000000000000); named environments use a shorter plain GUID.
3. In **Display Name**, enter a friendly label to show in the environment picker (e.g., "Production," "Dev/Test"). If left blank, the raw environment ID is shown instead.
4. Click **Save**.



The screenshot shows a dark-themed dialog box titled "Add Item" in teal. Below the title is the subtitle "Power Platform Environment details". There are two input fields: "Title *" with a red asterisk and a teal border, and "Display Name" with a white border. Below the "Title" field is a hint text: "** Enter Power Platform Environment ID.". At the bottom right are two buttons: "Save" in teal and "Cancel" in white.

Add Item

Power Platform Environment details

Title *

*** Enter Power Platform Environment ID.*

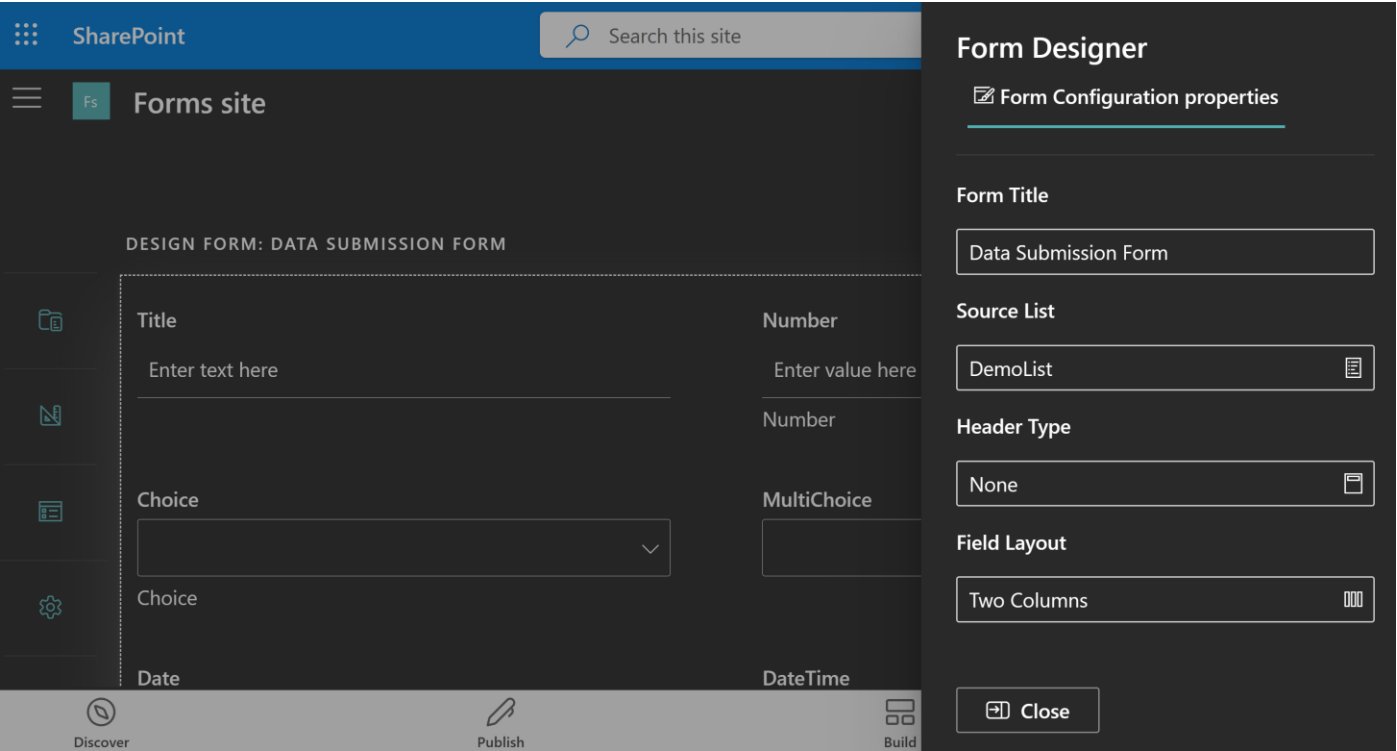
Display Name

Save **Cancel**

To edit or remove an environment: use the pencil (edit) or trash (delete) icons next to the relevant row. Removing an environment here only stops it from being searched for flow attachment — it does not affect the environment itself or any flows within it.

Design New form

Form properties



Configure following properties to provision new/edit form

Property	Description
Form Title	Title of the form.
Source List	The list on which the form is to be created.
Header Type	Header option for the form. Choose from: None, Banner, Logo, Logo and Banner, Text (rich text control), or Logo and Text (rich text control).
Field Layout	Layout option for the form. Choose from: Horizontal (one column), Two Columns, Three Columns, or Sections.

Header Type

Header options for the form. Choose from the following:

- **None** — No header displayed.
- **Banner** — Displays a banner image at the top of the form.
- **Logo** — Displays a logo at the top of the form.
- **Logo and Banner** — Displays both a logo and a banner.
- **Text (Rich Text Control)** — Displays custom rich text content as the header.
- **Logo and Text (Rich Text Control)** — Displays a logo alongside custom rich text content.

Header Configuration Options

Use the Designer to select banner and logo images, configure rich text content, and resize the header section using draggable handles (where applicable).

- **Banner** and **Text** types: resizable by height using the draggable handle.
- **Logo**: resizable by height and width using the draggable handle.
- **Two-column header types** (Logo and Banner, Logo and Text): drag the divider handle between elements to set the percentage width of each (logo, banner, or text control).
- All resizable headers have minimum and maximum height and width constraints, as applicable.

DESIGN FORM:

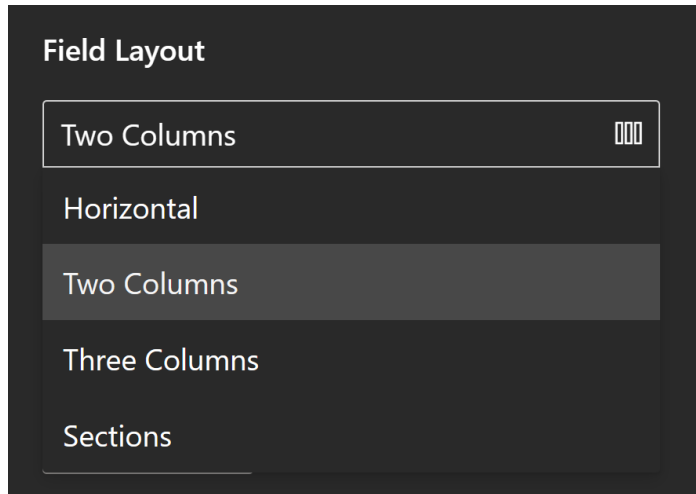


The screenshot shows a 'DESIGN FORM' interface. At the top, there's a header configuration area. On the left, there's a logo placeholder with a blue stylized 'V' icon. On the right, there's a banner image placeholder showing a landscape with water and hills. Below the header, there are two text input fields. The first field is labeled 'Title' with a red asterisk, and the second field is labeled 'Location'. Both fields have a placeholder text 'Enter text here'.

Field Layout

Field layout options for the form. Choose from the following:

- **Horizontal (One Column)**
- **Two Columns**
- **Three Columns**
- **Sections**

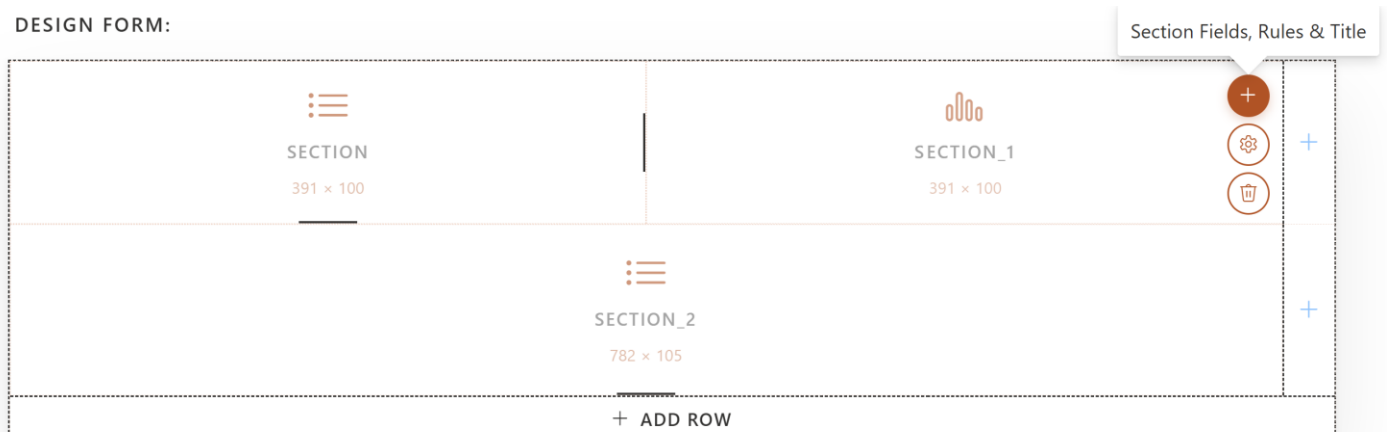


Sections

The Sections layout allows users to add multiple sections to a form, each with its own fields, layout, border, background color, and rules.

- Click **Add Section to This Row** to add a new section.
- New rows can be added at the bottom of the canvas, and each row can contain multiple sections.
- Sections are resizable with draggable handle to adjust section's width.
- Rows are resizable with draggable handle to adjust Row height.

DESIGN FORM:

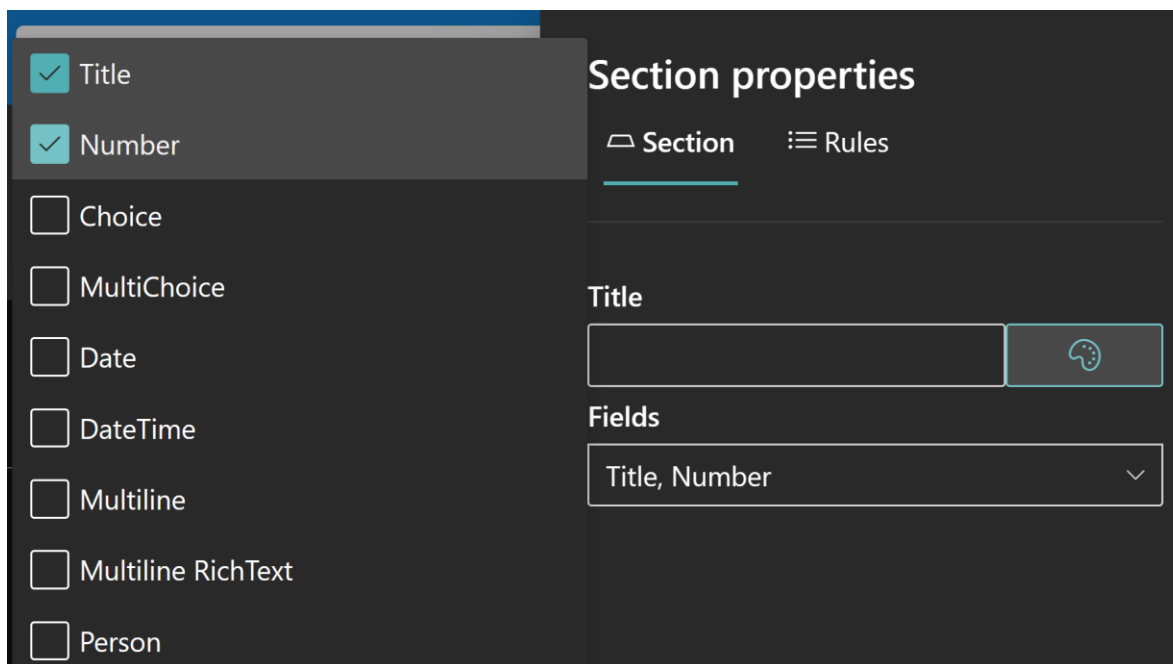


Each section includes buttons/options to:

- Map fields to the section
- Set an optional title
- Set display rules for the section
- Set styles (border, background, radius, etc.)

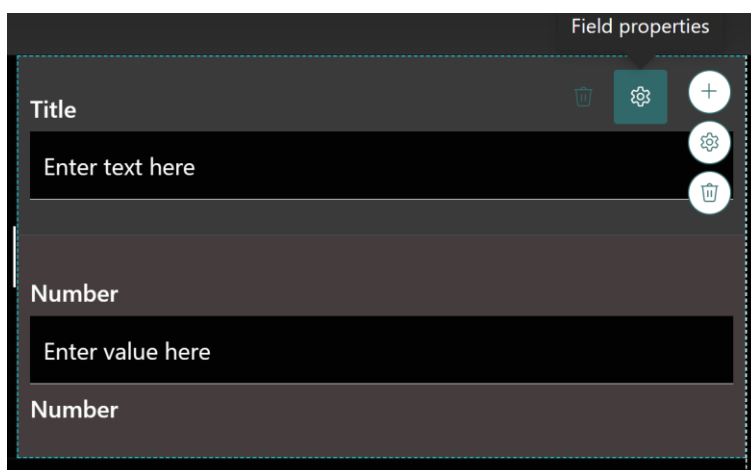
Section Title

Each section can have an optional title, with the option to set its color.



Field Mapping

You can select or deselect fields to map to a section. Fields mapped to a section can also be removed by Remove Field button. For details on setting field properties and rules, see the [Fields and Properties](#) section.



Section Rules

Sections can have visibility rules - configurable in the section's **Rules** option.

Section properties

▢ Section

☰ Rules

Default Display ☒ Visible

☐ Hide when

Title ▾

Equals ▾

Hide Section

Add

☐ Hide when

Title Equals Hide Section

✕

Section Styling

- **Border** — Width, style, color, and radius can be set for each section.

Section properties

▢ Border

🎨 Background

1 ▢

Dashed ▢

🎨

10 ▢

- **Background** — Background color can be set for each section.

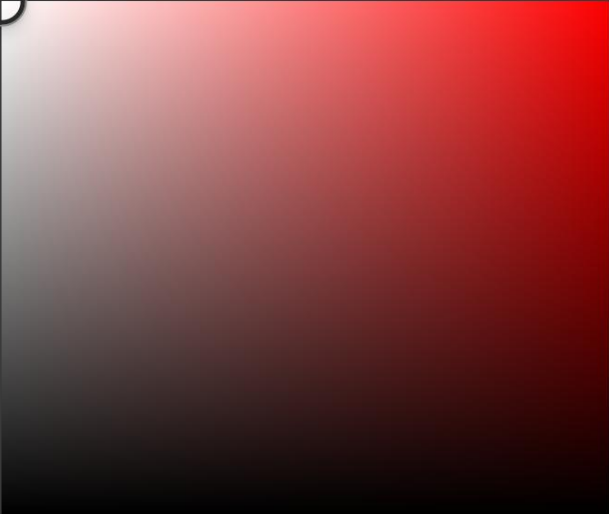
Section properties

☐ Border

☒ Background

 Colour









Hex	Red	Green	Blue	Alpha
ffffff	255	255	255	0

Fields and Properties

Once the form is configured and rendered in the web part body, fields can be rearranged by dragging and dropping them into a new position.

The screenshot displays the 'DESIGN FORM: DATA SUBMISSION FORM' interface. On the left is a sidebar with icons for adding fields: a document icon, a list icon, a choice icon, and a settings icon. The main canvas contains a grid of form fields:

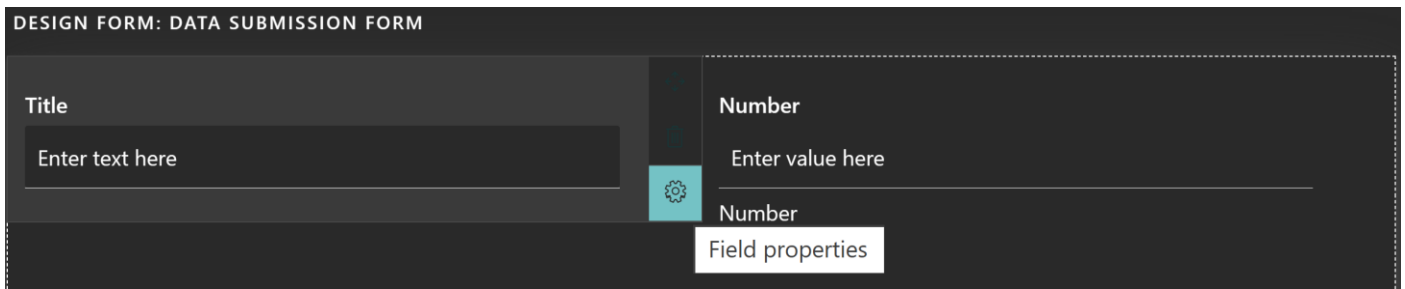
- Title**: A text input field with the placeholder 'Enter text here'.
- Number**: A text input field with the placeholder 'Enter value here'.
- Choice**: A dropdown menu with a downward arrow.
- MultiChoice**: A dropdown menu with a downward arrow.
- Date**: A date input field with a calendar icon and the placeholder 'Enter a date'.
- DateTime**: A date and time input field with a calendar icon, a time dropdown (showing '12 AM'), and a placeholder 'Enter a date'.
- Date Only**: A label for the date-only portion of the DateTime field.
- Multiline**: A text area with the placeholder 'Enter text here'.
- Multiline RichText**: A rich text area with the placeholder 'Enter text here'.
- Person**: A text input field for a person's name.
- ManagedMetadata**: A text input field with a placeholder 'Type term to tag' and a tag icon.
- Lookup**: A dropdown menu with '(None)' selected and a downward arrow.
- Attachments**: A section with a placeholder line and a link 'Add Attachment'.

At the bottom of the canvas is a toolbar with buttons: 'Save' (with a floppy disk icon), 'Publish' (with a document icon), 'Clear' (with an 'X' icon), 'Styles' (with a paintbrush icon), and a plus icon for additional options.

Fields can also be deleted from the form. Deleted fields can be re-added at any time using the **Removed Fields** menu button in form canvas.

Note: The field data shown while designing the form is for reference only. The Designer does not save or preserve any data — the Vike Form or Vike Form Grid web part is used to save data to the list(s).

Users can create multiple forms on a single SharePoint list, each with different fields. It's advisable to include all mandatory fields/columns from the source list on the form, although this is not enforced.



Field properties can be configured to control how each field behaves within the form. Click the **Field Properties** button for a field to set its title, description, and required-field validation.

This is a screenshot of the 'Field properties - Title' configuration panel. It has two tabs: 'Field' (active) and 'Rules'. Under the 'Field' tab, there are three sections: 'Title' with a text input containing 'Title', 'Description' with a larger text area, and 'Required:' with a toggle switch that is currently turned off.

Display (visibility) rules and value rules can be added for each field, and multiple rules can be applied to a single field:

- **Display rules** — The "Default Display" setting indicates the field's default visibility. If a field is visible by default, you can add rules to define when it should be hidden.

This screenshot shows the 'Field properties - Title' configuration panel with the 'Rules' tab selected. It has two sub-tabs: 'Display rules' (active) and 'Value rules'. Under 'Display rules', there is a 'Default Display' section with a toggle switch set to 'Visible'. Below this, there is a list of rules. One rule is shown: 'Hide when' (toggle on) followed by a dropdown menu set to 'Number', a comparison operator dropdown set to 'Greater than', and a value input set to '100'. An 'Add' button is next to the rule. At the bottom, a summary bar shows the rule: 'Hide when Number Greater than 100' with a close icon.

- **Value rules** — Sets a field's value based on a condition defined in the rule. If conflicting values or conditions are created across rules, the most recently run rule takes precedence. Value rules are currently not supported on certain special field types, such as Managed Metadata, Users, and Lookup.

Field properties - Title

Field **Rules**

Display rules **Value rules**

Set Title Equals

Choice 1

When

Choice

Equals

Choice 1

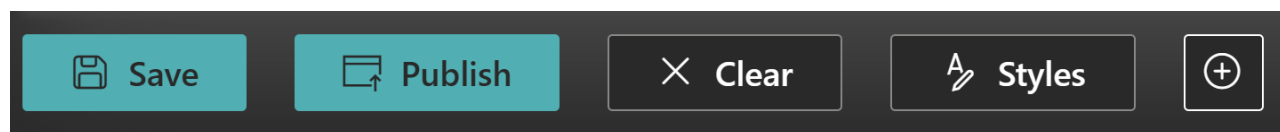
Add

Title equals Choice 1 when Choice Equals Choice 1 ✕

Note: Display and value rules are applied while submitting data through the relevant web parts. You can also see how rules work in practice in the [Manage Form - Review](#) section.

Form Controls and Styles

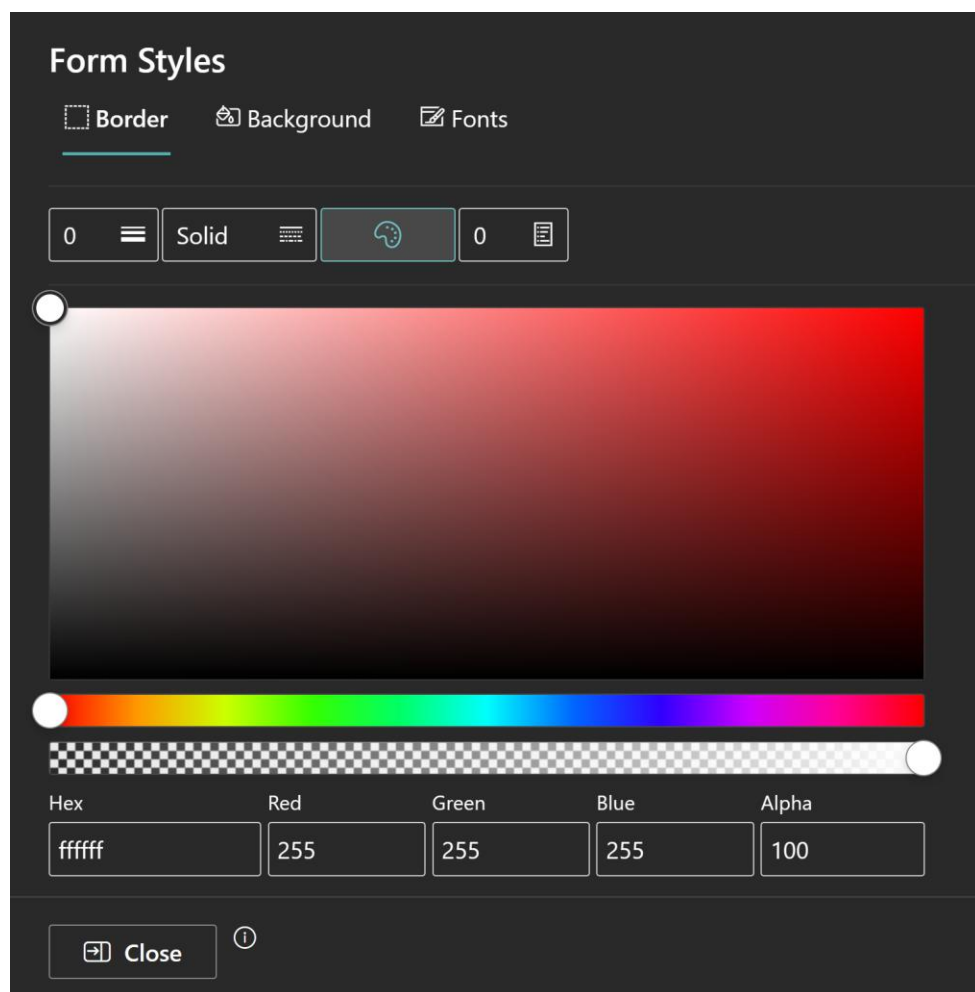
The Form Canvas includes the following buttons/controls:



Control	Description
Save	Saves the form for publishing later. A saved form can be edited at any time from the Manage Forms section.
Publish	Publishes the form. Published forms become available for configuration and data management in the Vike Form and Vike Form Grid web parts.
Clear	Clears all fields on the form.
Styles	Opens the Style panel to configure the form's styles. See the Form Styles section for details.
Removed Fields (menu button)	Visible when one or more fields have been removed during design. Allows users to re-add removed fields before saving or publishing the form.

Form Styles

Forms can be styled by clicking the **Styles** button in the Form Designer. This opens a panel where you can configure the form's border, background color, and fonts.



Section	Description
Border	Set border width, style, color, and radius.
Background	Set the background color.
Fonts	Set font family, weight, style, size, and color — configurable separately for labels and controls.

Font Family

Form Styles

 Border

 Background

 **Fonts**

Label Fonts

|

Use Google fonts ☐

Segoe UI Semibold 

400 

Normal 

14 



Controls

|

Google fonts ☐

Segoe UI 

400 

Normal 

14 



 Close



A set of standard, web-safe fonts is available by default.

Optionally, you can use open-source [Google Fonts](#) in the form. Toggle the **Google Fonts** button to enable this, then select a font from the available list (or type a font name directly into the dropdown).

Note: When using Google Fonts, it may take a moment to load information for the hundreds of available fonts into the dropdown. If this happens, close the Style panel and reopen it by clicking the **Style** button again.

Vike Form

A single-page data submission web part where users can visit and submit data through a published form.

The Vike Form web part is provisioned distinctly for each published form.

NEW BANNER FORM



Title *

Enter text here

Start Time *

Enter a date

12 AM

00

End Time *

Enter a date

12 AM

00

Category

Description

Enter text here

Save

Clear

Settings

Clicking the **Settings** button opens the Form Configuration panel, where the following properties can be set or updated:

Property	Description
Form	The currently mapped form.
Form Title	An optional title to display on the form.
Form Mode	Inline or Full Page

Note: Updating form properties updates the current page, its properties, and its version.

Form Properties

 Form Configuration properties

Form

New Banner form



Form Title

New Banner form

Form Mode

Inline



 Close

 Update

Vike Form Grid

Perform full CRUD operations (create, read, update, delete) on list items through a published form. Includes additional layout options for managing data views.

The Vike Form Grid web part is provisioned distinctly for each published form. You can select which fields are displayed in the grid.

Grid columns are resizable, and items can be searched by the Title field. Sorting and paging are enabled by default on displayed fields. The number of items shown per page can be set from the dropdown in the grid header section (the default value is configured in the Form Designer's Settings section).

The Forms dashboard allows users to view, create, read, update, and delete form data.

CUSTOM FORM

+ New

Search by title...

5

<

Page 1 of 12

>

	Title	Multiline	Number	Currency
	Test 2	Test 2	234	3453
	Title 2	Title 2	234234	123
	Title	title	12321	123
	Ext title	Ext title	23432	4564
	Test	Multiline text	123	123

1

2

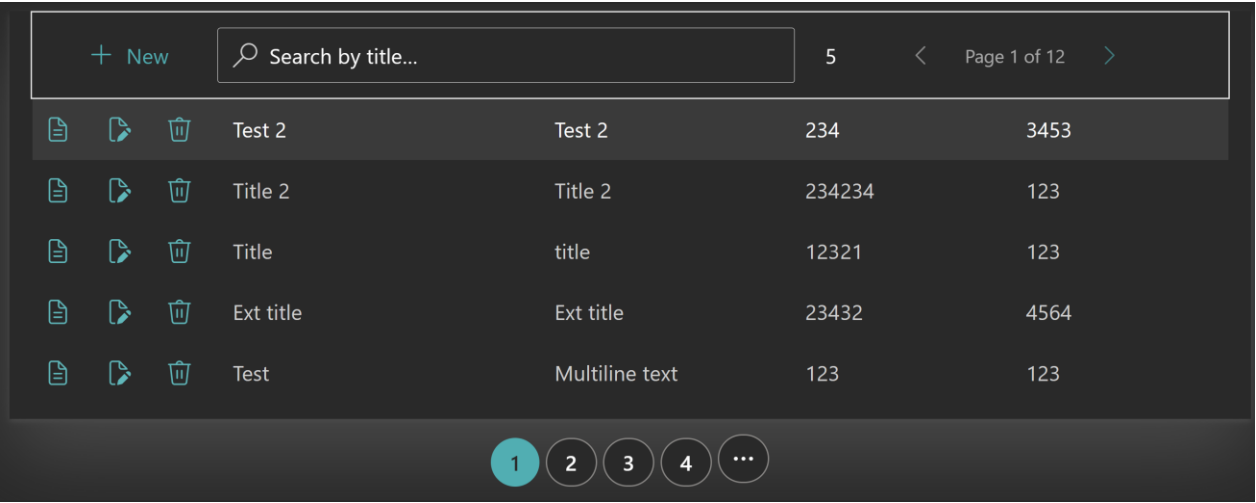
3

4

...

Display Options

Compact Display — Hides the title and grid header.



Link Display — Renders only a link to add a new item to the form, along with an optional description field. The default link text is the form title, which can be changed.

Link Display is useful for adding a simple link on a SharePoint page, allowing users to submit form data without navigating to the web part or list directly.

Custom Form Link

Custom form link added on SharePoint page,
Opens underlying form for submission

Grid Controls

Control	Description
View Item	Opens a form item in display (read-only) mode.
Add Item	Opens an empty form for submitting new data.
Edit Item	Opens the form item in edit mode.
Delete Item	Prompts for confirmation before deleting the item.

Uninstalling – Vike Forms for SharePoint

You have two options. Choose based on whether you want to keep the data the app stores.

Option 1: Remove the app only (keep your data)

Use this if you may reinstall later or want to keep your data.

1. Go to **Site contents** on the site.
2. Hover over **Vike Forms for SharePoint**, select ... (More options), then select **Remove**.

The app's data (for example, Settings and Forms) stays on the site. If you reinstall the app later, your data will still be there.

Option 2: Remove the app and its data

Warning: This permanently deletes all custom forms and relevant settings stored by the app on this site. It cannot be recovered.

Note: Data is deleted from the current site only. If the app is installed on multiple sites, repeat these steps on each site where you want the data removed.

Important: Delete the data *before* removing the app. Once the app is removed, the Settings page is no longer available.

1. Open the **Vike Forms Designer → App Settings** page.
2. In the **Remove app data** section, select **Remove app data**.
3. Review the list of data that will be deleted (for example, *Forms: 10 item(s)*).
4. Type **DELETE** in the confirmation box and select **Delete data**.
5. When you see the "App data removed" message, remove the app from the site using the steps in Option 1.
6. This functionality does not delete any of your native SharePoint lists, libraries data

Who can do this: Site owners (anyone with Manage Lists permission). If you don't see the **Remove app data** option, your account doesn't have the required permission.

Additionally, also delete any Full-Page apps you have created for custom forms. (Full-Page apps may still retain custom forms data and the page properties/DOM).

Important Notes

1. List changes after publishing a form

If you change the structure of a SharePoint list after a form has been created and published, the form may no longer work or be able to save data. In technical terms, this is a change to the list definition (also called the list schema).

Structural changes include:

- Adding a new column to the list
- Deleting or renaming a column
- Changing a column's type (for example, from text to choice)
- Changing the list title or URL

If you make any of these changes, create a new form for the updated list.

2. Cache not refreshing after form changes

Each time you make any of the following changes, you'll need to refresh the cache to see updates reflected:

- Update or publish a form
- Attach a workflow
- Set the render type to Forms in Designer

To refresh:

1. Reset the form properties in the relevant 'Form' and 'FormGrid' web parts.
2. Disable and re-enable the List Extension (if it was previously enabled).

This overwrites any cached browser versions.

3. Permissions required to design and submit forms

- Users with Edit permissions on the list (Edit list items) can both design and submit forms. Users with Read-only access cannot view, design or submit forms in the Vike Forms web parts.
- Design access is not restricted separately from edit access, so consider who has Edit permissions before granting them.
- If a user sees “You do not have the required permissions to design or submit forms,” ask a site owner to review their permissions on the list.
- If a user has Edit permissions on the list but only Read access to the site, they may not be able to save a form design. Ask a site owner to grant them at least Contribute access to the site.

4. Lookup, person and managed metadata fields

Fields that depend on other lists or services

Lookup, Person or Group, and Managed Metadata fields read their values from other lists or from the tenant. If a user cannot access the source list or term store, they may see empty options in the form even though the form is configured correctly.

5. Moving or copying a site or list

Moving forms between sites or lists

Forms are linked to the list they were created for. If you copy or move a list to another site, or restore it from the recycle bin, create a new form for the new list rather than reusing the old one.

6. Web part page in edit mode / page changes

Editing the page that hosts a form

If you edit a page and republish it, the Form and FormGrid web parts keep their saved properties. If a web part shows “Please configure web

part properties,” its properties were reset or the list it pointed to was deleted, so reconfigure it.

7. Trial licence

A trial licence is active for 30 days. While it is active, a trial banner is shown on the Vike Forms web parts.

When the trial ends, the web parts show a cancelled or expired message and all Vike Forms functionality is blocked, including designing, viewing and submitting forms. A subscription must be purchased to continue.

Your SharePoint lists data is not affected when a trial expires. The list continues to work normally in SharePoint, independent of Vike Forms.

To continue using Vike Forms, contact Vike Solutions to purchase a subscription and activate your production licence.

Once the licence is active, forms should work again without further changes. In some cases, such as full-width app pages, you may need to reset the web part properties for the form to reappear.

8. Browser and tenant admin issues

Form not loading or showing an error

If a form does not load, try a hard refresh (Ctrl+F5) and a private browser window to rule out cached files. If the problem continues, check with your administrator that the Vike Forms solution is deployed in the App Catalog and has been added to the site.

Vike Forms must be added to each site where it is used, because it provisions assets (such as the form configuration list) on that site. Deploying the solution to the App Catalog makes it available to add, but does not add it to every site automatically.

9. Large lists and performance

Large lists

SharePoint limits how many items can be retrieved at once (the list view threshold, 5,000 items), and Vike Forms is subject to this limit.

The FormGrid loads data in pages, so only part of the list is retrieved at a time.

To find a specific item, enter text in the search by title box above the grid. The search matches titles that start with the entered text and covers the whole list, not just the current page.

Known Behaviours & Workarounds

General troubleshooting steps

Vike Forms runs in the browser as a SharePoint Framework (SPFx) solution, so many issues come from the browser or page rather than the form itself. Before raising a support request, try these steps in order:

1. Hard refresh the page (Ctrl+F5, or Cmd+Shift+R on Mac).
2. Open the page in a private or incognito window to rule out cached files and browser extensions.
3. Sign out and back in to Microsoft 365, then try again.
4. Try a different supported browser.

If the problem continues, contact your administrator.

Changes not appearing after an update or deployment

Browsers and SharePoint cache the files that web parts load. After a solution is upgraded, you may see the old version, or a mix of old and new behaviour, until the cache is cleared. Hard refresh the page, or clear the browser cache. If the web part still does not update, ask your administrator to confirm that the latest version is deployed in the App Catalog and updated on the site. See also *Changes not appearing after updating a form*.

Button or control does not respond

Occasionally a button, tab or menu does not respond on the first click, especially while a page is still loading. Wait for the page to finish loading, then try again. If it still does not respond, refresh the page. Avoid clicking Submit or Save repeatedly, as this may create duplicate items or repeat the action.

Property pane options are empty or out of date

The web part property panes loads lists and forms when it opens. If a list or form you have just created is missing, close the pane, refresh page and reopen the property pane. If it is still missing, save the page, refresh it, and edit it again.

Data looks out of date

Forms and grids show data as of the time they were loaded and do not

update live. If another user has changed an item, refresh the page to see the latest data.

Errors after a page has been open for a long time

If a page is left open for a long period (for example, overnight), your sign-in session may expire. Saving or loading may then fail with an error. Refresh the page, sign in again if prompted, and re-enter any unsaved changes.

Slow first load

The first time a page with Vike Forms opens in a browser, the files must be downloaded, so it can load more slowly. Later loads are usually faster because the files are cached.

Sign-in problems with multiple accounts

If your browser is signed in to several Microsoft accounts (for example, work and personal), SharePoint may use the wrong one and show permission or loading errors. Use a private window, or sign out of other accounts and try again.

Blocked by browser extensions or network security

Ad blockers, privacy extensions, firewalls and proxy servers can block scripts that SharePoint web parts need. If forms load in a private window with extensions disabled, or on a different network, an extension or network rule is the likely cause. Ask your administrator to allow Microsoft 365 and SharePoint content.