

Quest Web Parts for SharePoint

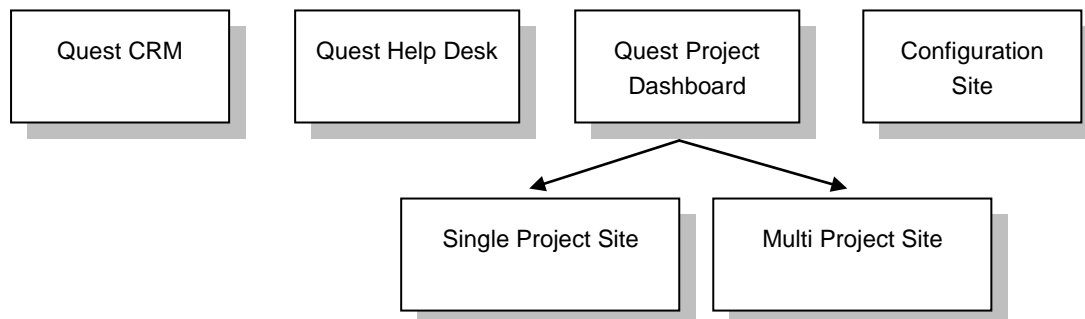
Quest Web Parts for SharePoint enables you to build line-of-business applications on the SharePoint Platform while overcoming the limitations of SharePoint forms, lists, etc.—all without coding. While this walkthrough will not cover all Quest Web Parts features, it will highlight the features you are most likely to use first. The following sections will show you how to use Quest Web Parts for SharePoint:

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Environment Information

Quest Web Parts for SharePoint are installed on all SharePoint web applications. If you edit a page and select “Add a Web Part”, you will see all of the Quest Web Parts in a folder named, “Quest Web Parts”. As you navigate to different subsites, you can always return to the top level web site by entering the following URL in a browser: <http://sharepoint/qwp/default.aspx>. Note the QuestDrive environment does not have access to the Internet.

Six Quest Web Parts sample application templates are installed: CRM, Help Desk, Project Dashboard, and Multi and Single Project Sites, which rollup to the Project Dashboard. Here is the site structure:



To become familiar with Quest Web Parts for SharePoint, we recommend that you first explore the CRM sample application template included with the product. Using the CRM application to create Customers, Contacts and Conversation records will demonstrate how a completed Quest Web Part application works and will show you a few of the Quest Web Parts in action. After you finish exploring the CRM Application, the walkthrough will give you hands on experience configuring Quest Web Parts and should give you some ideas how Quest Web Parts can be used in your organization.

Explore the Sample CRM Application Template

1. Locate the folder on the desktop labeled “Quest Web Parts for SharePoint”. Open the folder and click “Launch QWP”. If you are prompted for a login, you can use:

user name: **QSFTDEMO\quest** and password: **Pa\$\$word**.
2. Click “Quest CRM” on the Top link bar. Click the web page refresh icon on the browser (located at the top of browser to the right of the page URL). After the page refresh, you will see three companies listed. Note a Company can have one or more Contacts and a Contact can have one or more Conversation Records. This represents a relationship where a child record can also be a parent to a child records. Many applications built with Quest Web Parts will have one or more parent/child relationships.
3. Explore the CRM Application by clicking the “New” button on the Companies List.
4. Enter a company name, a location and a time difference (e.g., -3). Optionally, complete other fields.
5. Click the “Save and View Detail” button on the Company form toolbar.
6. Scroll down the page and create a new Contact by clicking the “New” button on the Contacts list.
7. Enter a First Name and a Last Name for the Contact. Optionally, complete other fields.
8. Click the “Save and View Contact Detail” button on the Contact form toolbar.
9. Scroll down the page and create a new Conversation Record by clicking the “New” button on the Conversation Records list.
10. Enter any text in the Notes section of the Conversation Record form (e.g., “this contact is ready to make a purchase”). Notice the Company and Contact information on the form are read only. Displaying parent values ensures that the data entry is performed under the correct parent record.
11. Optionally, click on other sections of the CRM application like the “Search Tasks” and “Search Sales Funnel”.

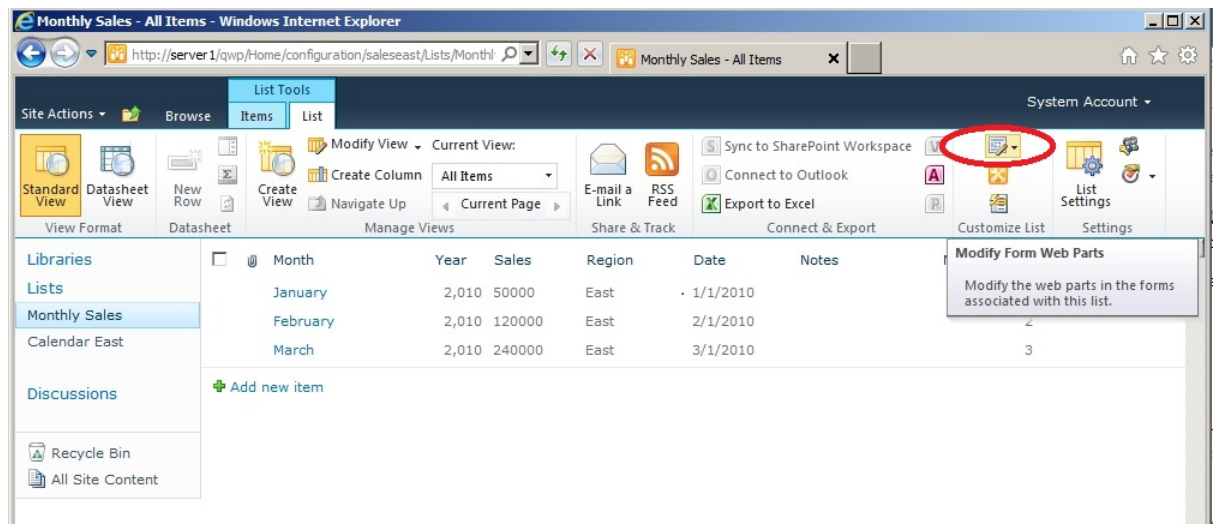
Aggregating Data in the qListView Web Part

1. Click “Configuration Site” on the Top link bar. Notice the site has two subsites displayed on the Quick Launch area on the left side of the browser under Sites. The preconfigured qChartView on the page charts “Monthly Sales” for both subsites. We will configure a qListView to show the sales in a grid.
2. Click the subsite “Sales East Region” and click the “Monthly Sales” list. This custom list has sales amounts for the East Region. Optionally, view the “Sales West Region” subsite and the “Monthly Sales” for the West Region. Note, both “Monthly Sales” lists have the same columns, but different sales amounts for the given region.
3. Click the “Configuration Site” on the Top Link bar.
4. Click the “Page” tab on the upper left corner of the browser and click “Edit Page”.
5. Click the “Add a Web Part” link on the page. This displays the Web Part Categories.
6. Click the “Quest Web Parts” folder under the Categories. Notice all Quest Web Parts begin with the letter “q”.
7. From the list of Quest Web Parts, click qListView, select the “Add Web Part to: Left” option and click the “Add” button.
8. The qListView Web Part appears on the page and four bulleted options are shown that will quickly get you started with the web part—note the Quest Drive environment does not have access to the Internet so the links will work. All Quest Web Parts need to be configured before they can be used.
9. Click the upper right corner of the Web Part. You should notice that a small triangle and a square appear. Click the small triangle to popup the qListView Web Part Menu. Note all menu options from Minimize to Export are the same for all SharePoint web parts. Quest Web Parts add the following custom menu options: Help, ezWizard, ezEdit and About.
10. Click “ezEdit”. Note the configuration editor dialog pops up. The tabs at the top of the dialog may be partially hidden. Resize the dialog to show the tabs by clicking one side of the dialog box and pulling the side slightly inwards. While there are a lot of tabs, the three tabs you will use most often are “Appearance”, “Display” and “Toolbar Appearance”.
11. Click the “Appearance” tab and replace qListView with “Sales Rollup”.
12. Click the “Display” Tab. Note the large text areas. The text areas show XML settings for that section. Manipulating XML directly is an advanced feature that you don’t have to use to work with the Quest Web Parts. Each section (e.g., Viewed Lists, Display Fields, etc.) has an “Edit” button that enables you to configure the section by just using your mouse.
13. Click the “Edit” button to the right of Viewed List. Here is where we indicate which lists should be included in the rollup. Note the two “Monthly Sales” lists we want to rollup are subsites and not on the current site. So, click the “Select lists from another site” button.

14. Enter "Monthly Sales" for the List Name and click the check box in front of "Search of Subsites". Click the "Get Lists" button.
15. Select the Sales West Region (./saleswest) by clicking the checkbox in front of Monthly Sales. Select the Sales East Region (./saleseast) by checking the checkbox in front of the second Monthly Sales. Click the "OK" button. Click the "Save" button to continue configuring the web part.
16. Notice how the XML in the text area is automatically filled in. Click the "Edit" button for the Display Fields to select which fields you want the web part to display.
17. Click the check boxes in front of the following fields: Month, Year, Sales, Region and Date. Click the "Save" button.
18. Copy and paste the Display fields XML to the Searched Fields text area. Copying and pasting the XML is a shortcut approach to configuring search fields. As an alternative, you can click the 'Edit' button next to the "Searched Fields" box and select each search field one at a time.
19. Click the "Toolbar Appearance" tab. Notice the drop down list of names next to the "Toolbar Skin Name". You can leave the skin name with default "Quest". Later, you can change the skin name to another selection to see which color combination you like the best. Quest Web Parts also allows you to create your own skins based on your corporate color pallet. Creating skins is beyond the scope of this walkthrough; however, your custom skins will also appear in the drop down list of available skins. Click the "Show Export Button" checkbox. Click the "OK" button.
20. The qListView Web Part is now configured and you should see a rollup of sales from both the West and the East Regions.
21. Click the "Actions" button and the "Filter" option. Enter "East" for the Region filter and change the Region dropdown from "Exclude from search" to "Equals". Click "Go!" to filter the list and show only sales in the East Region. Optionally, click "Reset" and try different filter criteria.
22. Click the "Actions" button and the "Export" option. Whereas out-of-box SharePoint only allows you to export to Excel, Quest Web Parts allows you to export to Excel, PDF, Word and CSV. Select Export to PDF and click the "Go!" button to export the filtered rows to Adobe Reader. Click the "Open" button when prompted by Adobe Reader.
23. Optionally, try exporting to Word, Excel or CSV. Click the "Close" link when you are finished trying out the qListView export feature.

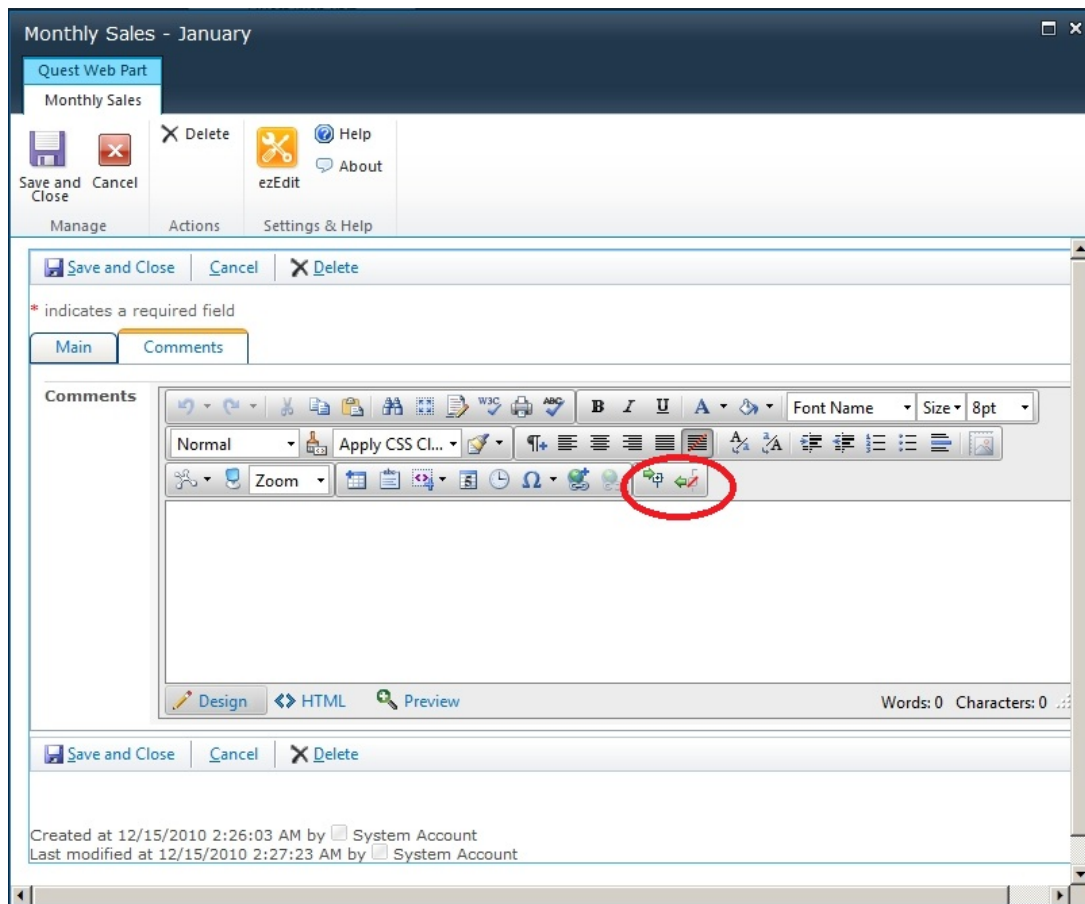
Basic qListForm Configuration

1. In the upper left corner of the browser to the right of "Site Actions", click the site navigation, icon--displayed as a folder with a green arrow on it. Click "Quest Web Parts for SharePoint", Click "Configuration Site". Click the "Sales East Region" on the SharePoint quick launch on the left. You should be on the Sales East Region subsite. Click "Monthly Sales" on the SharePoint quick launch. Under "List Tools", click the "List" tab on the SharePoint ribbon on top of the browser. Click the "Form" icon shown circled in red in the screen snapshot below.



2. Clicking the triangle next to the form with a pencil icon displays three form fields that you can edit: "Default New Form", "Default Display Form" and "Default Edit Form". Click "Default Edit Form".
3. Click "Add a Web Part" on the page. Click the "Quest Web Parts" folder. Click qListForm and select the "Add Web Part to: Main" option and click the "Add" button. The un-configured qListForm is added to the page.
4. Configure qListForm by clicking the small triangle in the upper right corner of the web part and selecting the "ezEdit" menu choice.
5. Click the "Display" and enter a "." Period (without quotes) for the Site URL and enter "Monthly Sales" for the list name.
6. Click the "Edit" button for the "Form Layout" section. Click the "Add Tab" button and enter "Main" for the ID and "Main" for the Label. Click "Add Tab" and enter "Notes" for the ID and "Notes" for the Label. Click the "OK" button.
7. Click the "Edit" button for the Display Fields and check the box in front of the following fields: Month, Year, Sales, Region, Date and Comments. For the "Comments" field, select the drop down choice "Comments" for the "Container ID". Click the "OK" button.
8. On the tabs at the top, click the right triangle to show more tabs. Click the "Control Appearance" tab when it appears. Next to the "Rich Text Editor Toolbar Settings", click the "Edit" button. Click the "Enhanced Rich Text" tab and then click the checkbox in front of "Collapsible Section". Click the "OK" button. Click the "Display" tab.

9. Scroll down the page and enter a "." Period (without quotes) for the "Next Page URL". Click the "OK" button. The qListForm is now configured, but you will see an error message that says, "The HTTP Parameter is required". You can ignore this message.
10. Hide the SharePoint Monthly Sales Form by clicking the small triangle in the upper right corner of the SharePoint Monthly Sales web part and selecting the "Edit Web Part" menu choice. On the right side of the browser, click the "+" next to the Layout option in the web part configuration pane. Click the checkbox in front of "Hidden". Click the "OK" button. The SharePoint Monthly Sales will be hidden and the qListform will be shown in its place.
11. Go back to the Configuration Site by entering the following URL in the Internet Explorer browser: <http://server1/qwp/Home/configuration/default.aspx>
12. Click a row in the East region. Using your right mouse button, right click the row and select the "Edit Properties" menu choice. Note the qListForm is displayed and the standard SharePoint form is hidden. Optionally, click the "Comments" tab on the form. Look at the picture below, the red circle shows rich text buttons that allow you to create and remove text sections that expand and contract.



In the Comments text box, type the words, "Section 1", enter a return, then type "Section 2". Highlight "Section 1" with your mouse by clicking the "S" in section and dragging your mouse across the word to the end of the word, "1". Click the "Apply Section" toolbar button—it is the button with the green arrow pointing to the right. A section will be created in the rich text called,

“New Section” which you can rename to anything you want (e.g. Section 1). Under the new section you created, you can type over the word “Section 1” and add as much collapsible text as you want to add. By clicking the “+” or “-” sign in front of the section, the text will expand or collapse the text under the section. Experiment with “Section 2”.

This expand/collapse capability in a rich text field is commonly found in a Lotus Notes applications and the capability is now available on SharePoint when qListForm is used. If you are migrating from Lotus Notes to SharePoint using the Quest Notes Migrator for SharePoint (NMSP) product, NMSP will preserve the collapsible sections and qListForm will render the sections without loss of section data.

Note each SharePoint custom list has three forms associated with it: DispForm.aspx, NewForm.aspx and EditForm.aspx. In this walkthrough you hid the EditForm.aspx on the Monthly Sales for the East Region and replaced it with the qListForm web part. To use qListForm for all pages, you would repeat the steps above for NewForm.aspx and the DispForm.aspx for both the East and West Region. To speed up the configuration of qListForm, you can copy and paste the EditForm.aspx, XML sections to the corresponding NewForm.aspx and Dispform.aspx XML sections.

Get More Information

The above scenarios briefly demonstrate just a few of the features that Quest Web Parts for SharePoint provides to help your organization.

To get more information about Quest Web Parts for SharePoint, select one of these options in the upper right hand corner of the screen:

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