



Virto SharePoint Forms Designer

Installation and User Guide

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Virto SharePoint Forms for SharePoint 2016, 2013

Key Features

1. Creating or editing forms for SharePoint lists
2. Designing item forms view with drag and drop feature.
3. Grouping fields into tabs and accordions.
4. Structure templates for forms, fields and sections view.

System Requirements

Operating System

Microsoft Windows Server 2008 and 2012

Server

SharePoint:

- Microsoft SharePoint Server 2013;
- Microsoft .NET Framework 4.5.

Browser

Microsoft Internet Explorer 9 or higher is required.

Installation

This section describes how to install, upgrade, uninstall, or contact Support for the Virto List Form Designer.

Installing Virto SharePoint Forms

Before you begin, you need to make sure you have access to the server and your account has the appropriate administrative privileges to install applications.

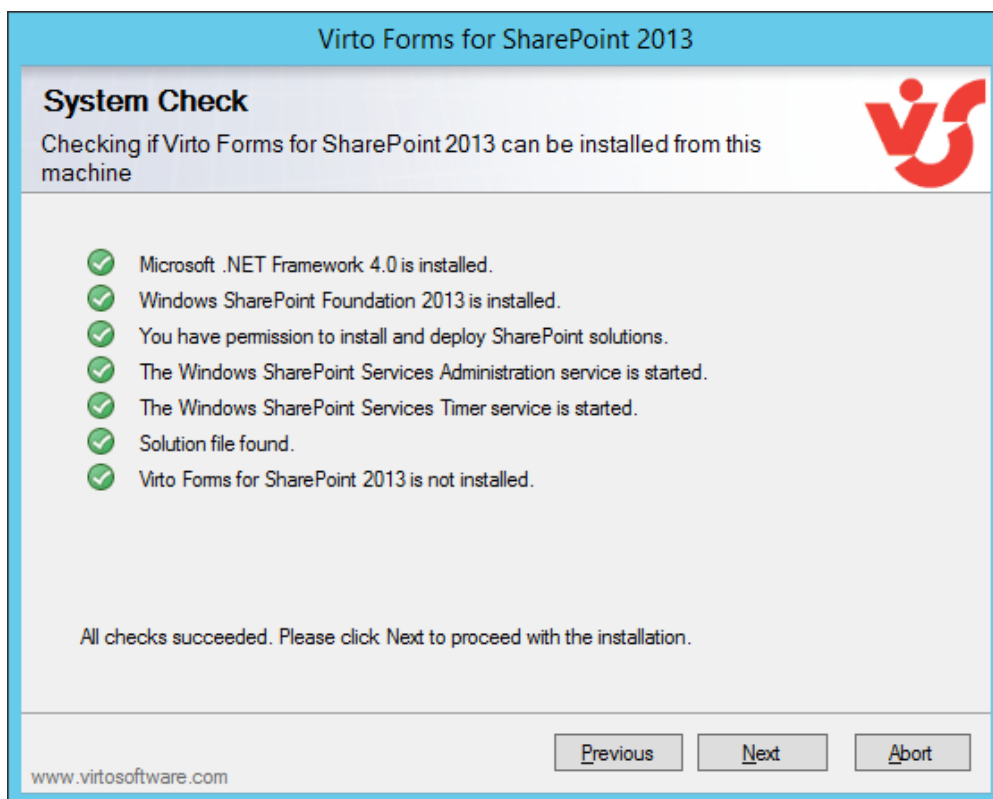
Virto SharePoint Forms setup program provides links to the various installation components for SharePoint Forms.

To access SharePoint Forms Setup program download **Virto.SharePoint.FormsDesigner.X.X.zip** file and unzip it. Open folder and run extracted Setup.exe file.

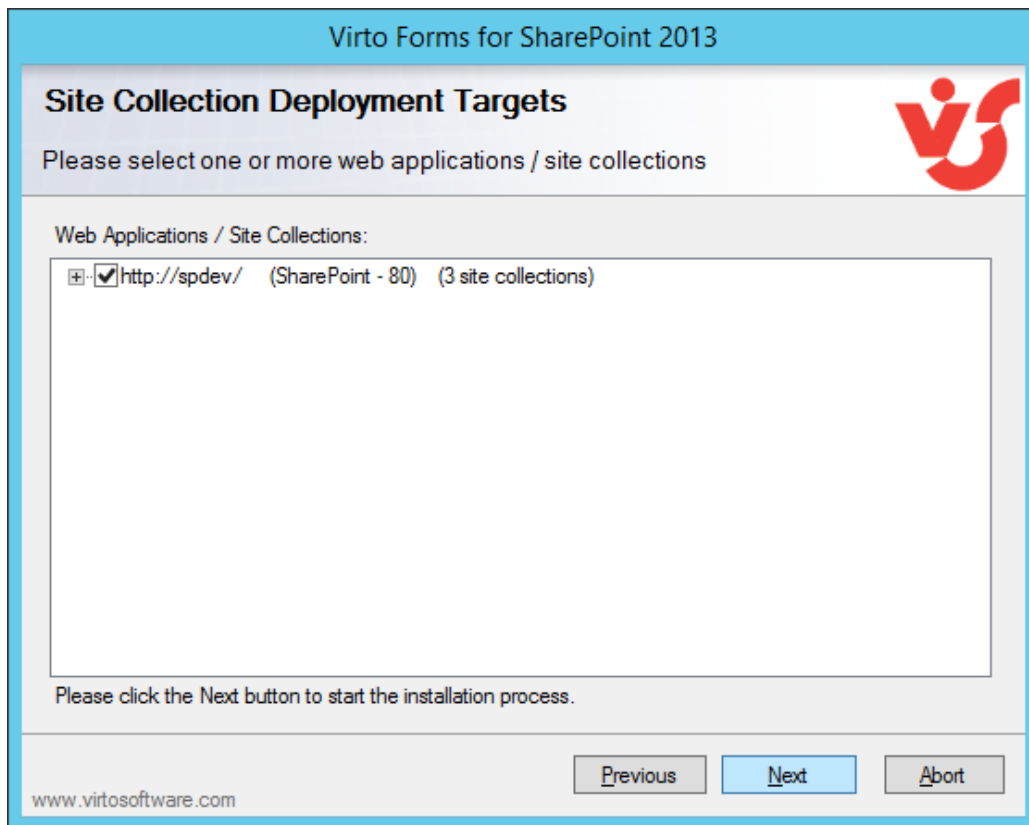
The setup wizard window will appear.



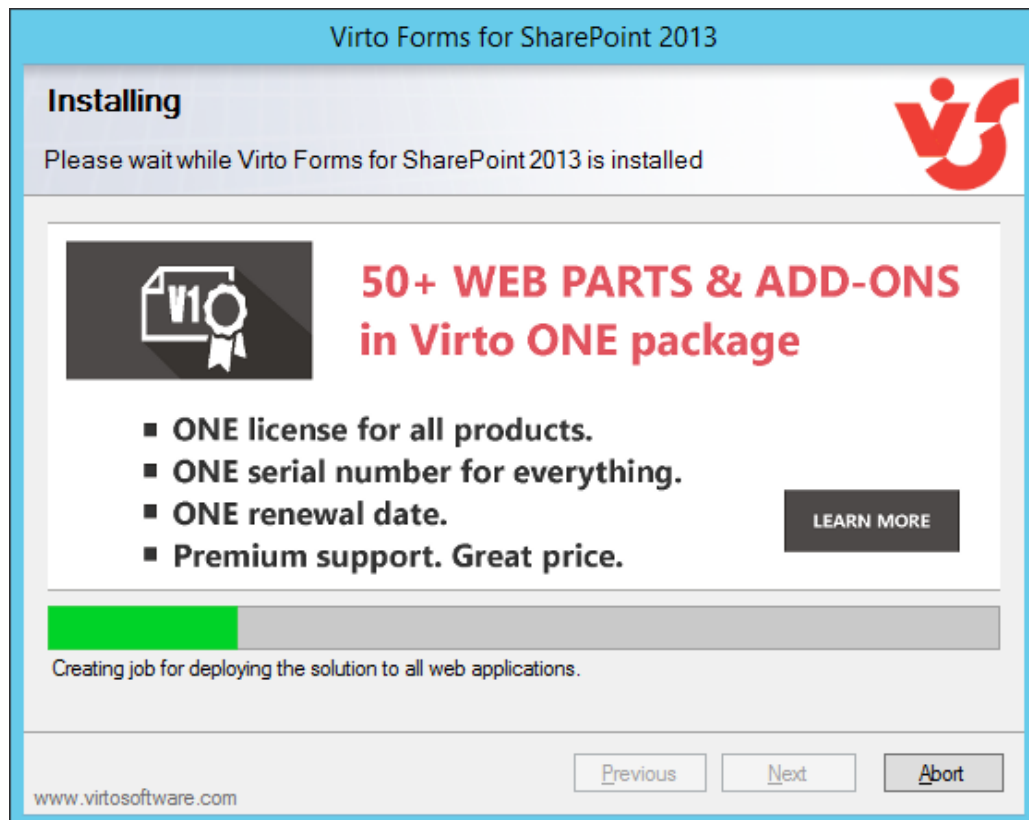
SharePoint Forms Designer setup wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click "Next".



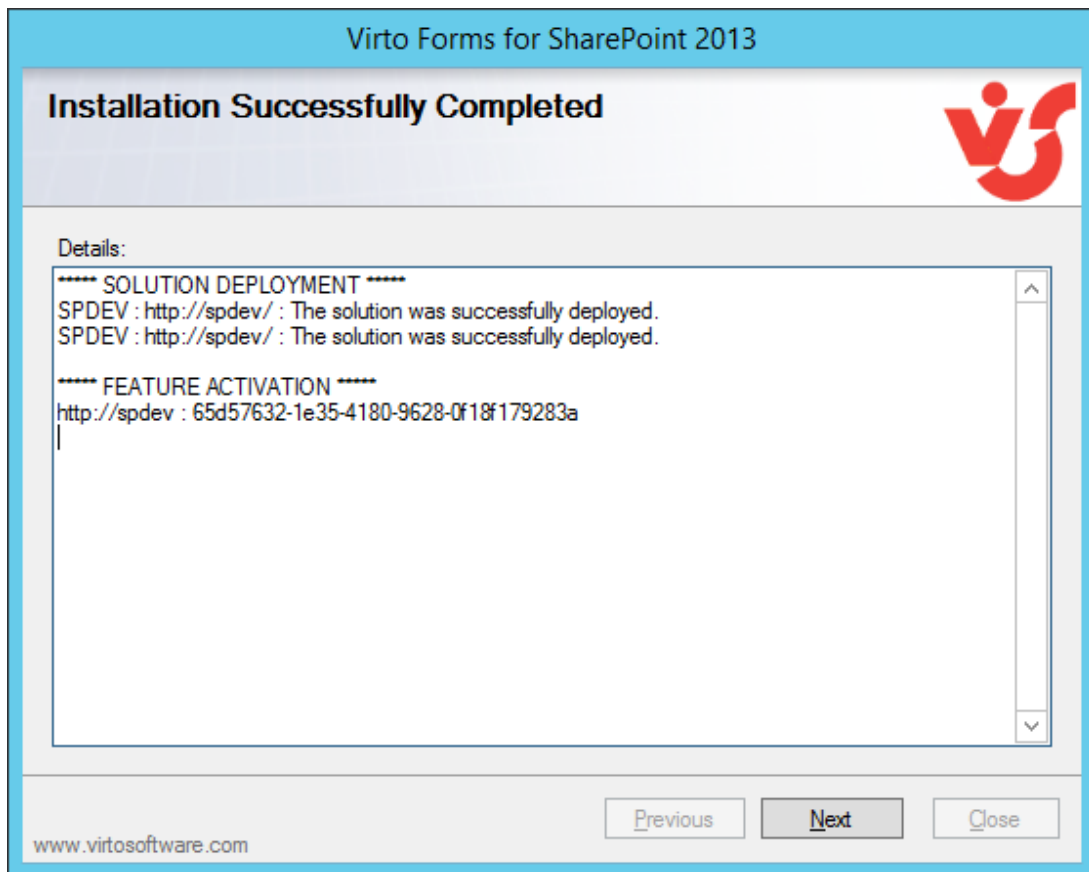
Select the web application(s) where you want to install the product.



Warning: You must be logged in to the SharePoint server with a Site Collection Administrator account to automatically activate this feature.



Then click "Next".



Click "Close".

License Activation

To see full instruction for successful activation of your component, please read our [blog](#).

Upgrading Virto SharePoint Forms

If you already use SharePoint Forms and need to upgrade it to the latest version, download the .zip file from <http://www.virtosoftware.com>. Unzip the file and run setup.exe as it is described in the *Installing SharePoint Forms for SharePoint 2013* section.

Note: it is highly recommended to exit License Manager before upgrading. If you need to use License Manager, run it after upgrading.

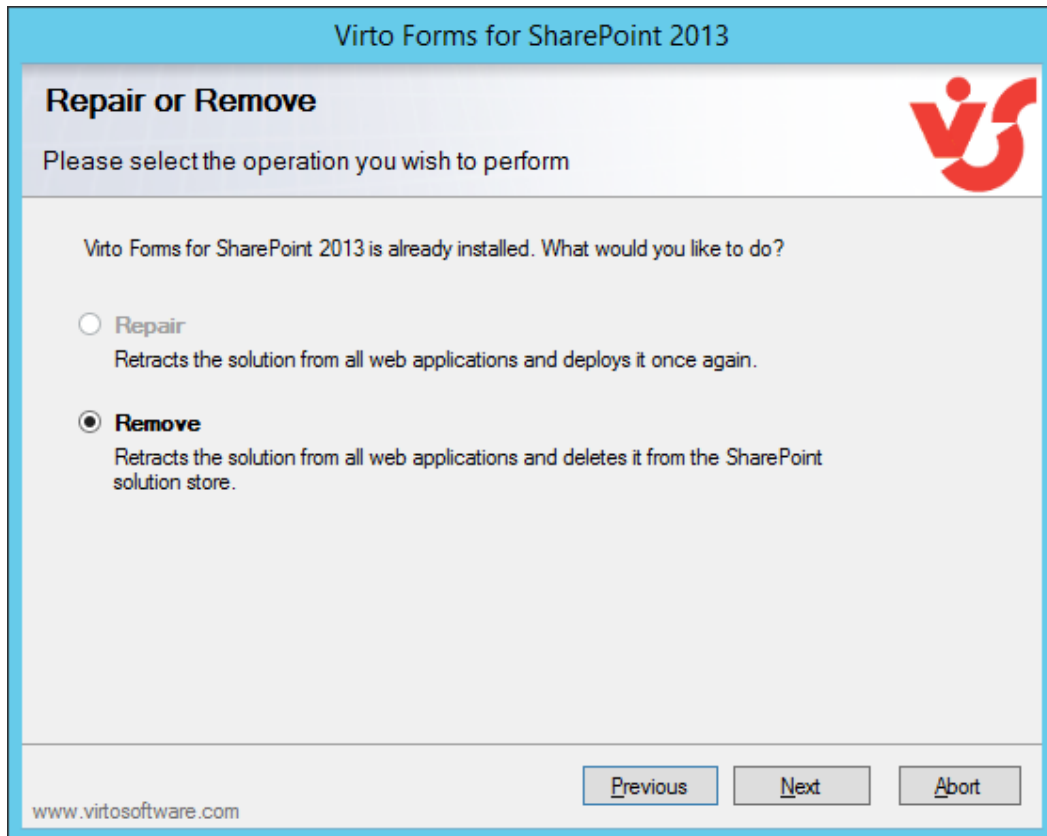
On the step check the box "Upgrade" and click "Next".

Note: if you had activated the license while installing the previous Virto SharePoint Forms version, you do not need to activate it now.

Uninstalling Virto SharePoint Forms

To uninstall the solution:

1. Double click the Setup.exe extracted from downloaded **Virto.SharePoint.FormsDesigner.X.X.zip** file.
2. The program performs the system checks again. Once that has successfully completed, the program prompts you to Repair or Remove the solution. Select Remove, and click "Next".



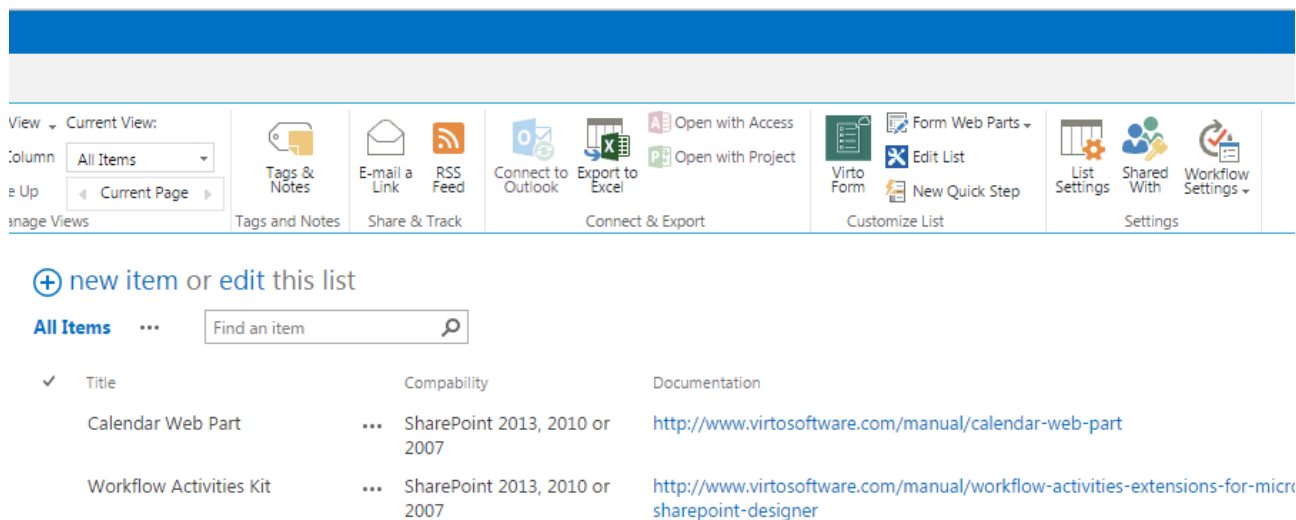
Note: after uninstalling Virto SharePoint Forms, all the settings applied to SharePoint lists with the component will be removed.

Virto SharePoint Forms Administration and Usage

SharePoint Forms

Adding New Form

Go to a required list in your SharePoint and switch to “Library” or “List” tab. Click on Forms Designer icon on the ribbon. SharePoint Forms will be opened in the new window.



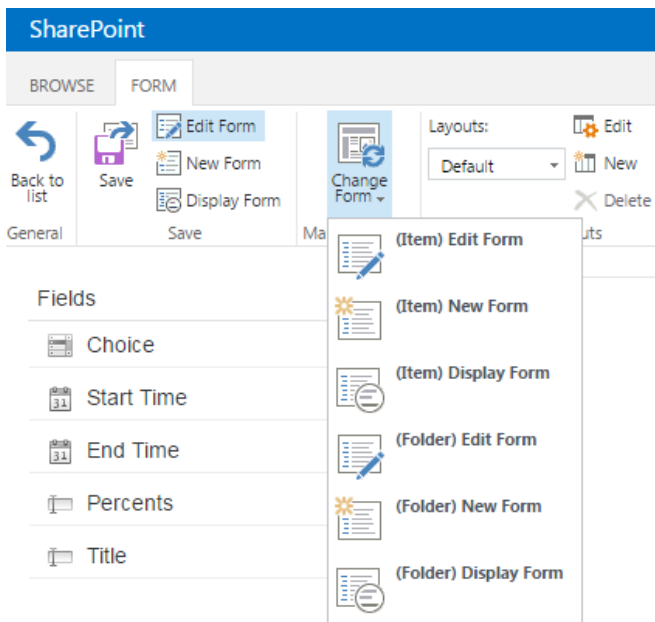
On Virto SharePoint Forms page use dropdown “Change form” to create a new form.

The form types are available according to content type. For example:

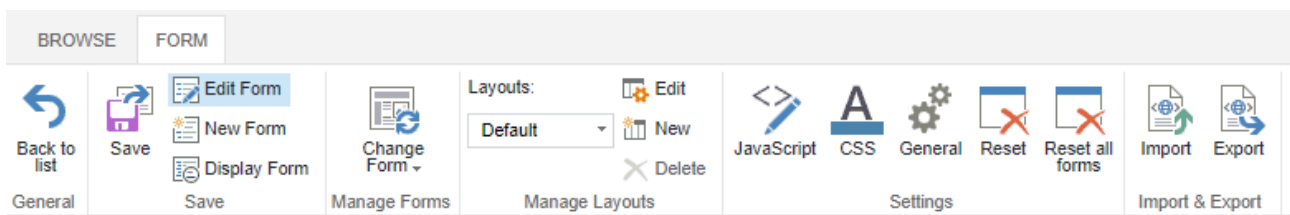
- Item edit form
- Item new form
- Item display form
- Folder edit form
- Folder new form
- Folder display form

In other words, you can create a form view for a folders structure or create a form view for list items in a SharePoint library.

In the following examples the item form will be used.



If you want to reset a form view, click “Reset” button on the ribbon. You may also use “Reset all forms” to reset forms for all views and content types.



You can open edit form to start creating a new form for list items editing. Actually, you can use any other default form view to start working with Virto SharePoint Forms.

All existing fields of the corresponding list are displayed on the top.

Basic controls for SharePoint form creating are located below.

SharePoint

BROWSE FORM

Back to list Save Edit Form New Form Display Form Change Form

Layouts: Default Edit New Delete JavaScript CSS General

General Save Manage Forms Manage Layouts Settings

Predecessors

Description

% Complete

Number

Task Name

Assigned To

Basic Controls

Accordion

Button

Form name

Html

Hyperlink

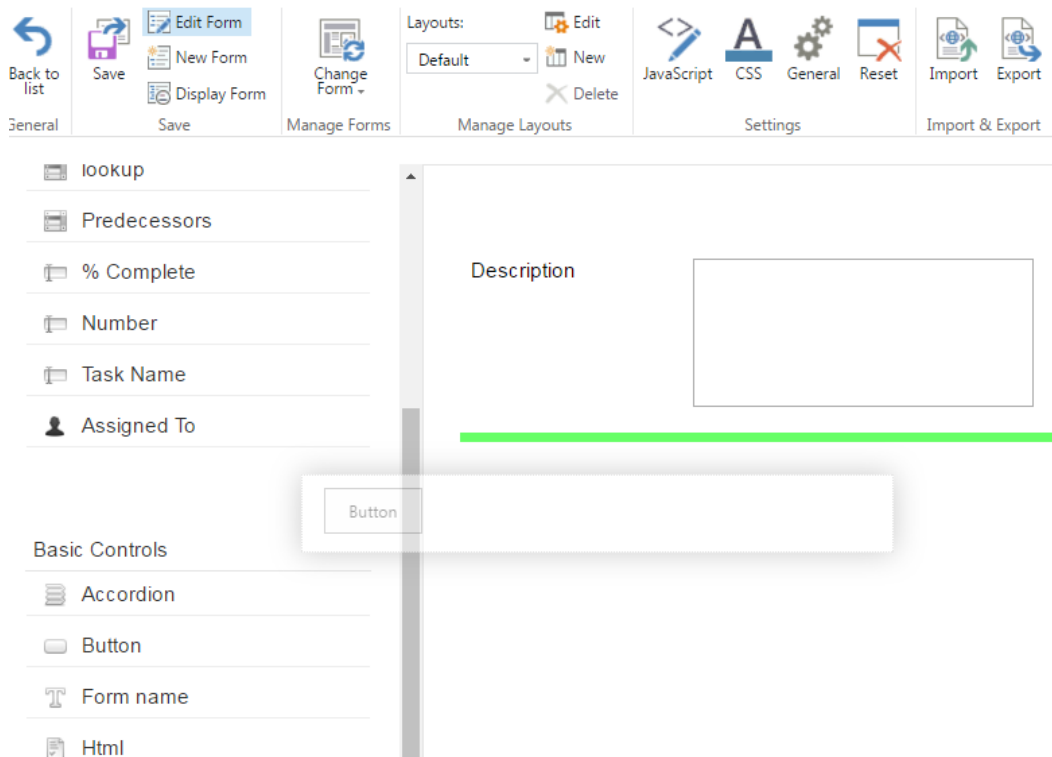
Image

Text

Tabs

White Space

Now you can design a SharePoint form, using drag and drop function. New section will appear on the form.



In the right part you can define additional parameters of chosen controls.

For example, you can type titles for both tabs, add new tab or adjust security settings.

+ Add tab

Tab one 🗑️

Tab two 🗑️

Control properties:

Name:

Security properties:

Show to all users

Show to selected groups and users

Security type: Hide Read-only

Allowed User Groups:

Allowed User(s):

[Remove](#)

Also, you can make changes for fields.

SharePoint Forms Designer allows you to define label text appearance of the list fields. Choose text color, style and size to change its appearance.

Note: it is impossible to add fields of “Attachment” type.

Note: fields from lists of “Document Library” types are not supported.

Note: “Recurrence” and “All day event” fields from lists of “Calendar” type are not supported.

Date and Time fields have an additional option to set a custom time format for date and hours.

The “Field name above the field value” option allows you to put the name of a field above the field box. For example, “Title” field is shown with this option applied.

Permissions

You can define custom permissions to the most of elements in your SharePoint Forms.

Security properties:

- Show to all users
- Show to selected groups and users

Security type: Hide Read-only

Allowed User Groups:

Allowed User(s):

The element can be visible for all users or you able to set custom permission for limited list of allowed users or SharePoint groups.

Security properties:

- Show to all users
 Show to selected groups and users

Security type: Hide Read-only

Allowed User Groups:

Allowed User(s):

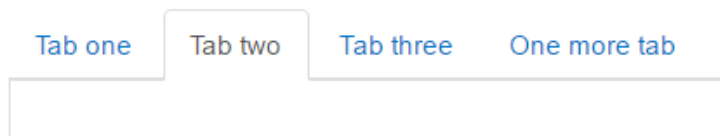
Note: The required fields marked with * are always visible for all users.

Note: If a tab or accordion section contains the required fields marked with *, this tab or accordion section with all fields is always visible for all users. However, you are able to set permissions to other sections or tabs of the same element and apply them to hide other fields. For example, section 1 with an required field is visible, but section 2 can be hidden.

Adding sections from basic controls

Tabs

You can create multiple tabs to optimize your SharePoint form view.



You can add more tabs by clicking “+ Add tab” button and type tab names in the control properties in the right corner. Remove the tab by clicking delete icon on the end of a chosen tab row. Delete all tabs by clicking on red “Remove” link.

Then save changes to display created tabs.

All tabs can contain any other controls, including other accordions and tabs.

Theme: Default

+ Add tab

General 🗑️

Details 🗑️

Control properties:

Name: Details

Security properties:

Show to all users

Show to selected groups and users

Security type: Hide Read-only

Allowed User Groups:

Allowed User(s):

Links 🗑️

[Remove](#)

Tabs and accordions have Themes.

For example, you can color-code all form container headers in yellow color.

Theme: Yellow

+ Add section

Section one 🗑️

Section two 🗑️

[Remove](#)

Accordions

An accordion can contain any other controls, including other accordions and tabs.

Section one

Section two

Price
 Free trial

The last section

To add more accordions to existing form click “+ Add section”. Type new section name in the control properties. Remove the accordion section by clicking delete icon on the end of a chosen row. Delete all accordions by clicking on red “Remove” link.

Then save changes to display created accordions.

+ Add section

Section one 🗑️

Control properties:
 Name:

Security properties:
 Show to all users
 Show to selected groups and users
 Security type: Hide Read-only
 Allowed User Groups:
 Allowed User(s):

Section two 🗑️

The last section 🗑️

Remove

Hyperlink

You are able to add links to your SharePoint Forms.

Tab one Tab two

www.virtosoftware.com

In hyperlink properties you can define following settings:

- a link name in required format <http://yoursite>
- Label text of hyperlink
- Font size (optional). Choose text size from dropdown or with slider. Define font weight and style.
- Font color

Control properties:

URL:	<input type="text" value="http://www.virtosoftware.com"/>
Text:	<input type="text" value="www.virtosoftware.com"/>
Font size:	<input type="text" value="14px"/> <input type="range"/>
Font weight:	<input type="text" value="Normal"/>
Font style:	<input type="text" value="Normal"/>
Font color:	<input type="text" value="#000000"/> <input type="color" value="#000000"/>

Security properties:

- Show to all users
 Show to selected groups and users

Security type: Hide Read-only

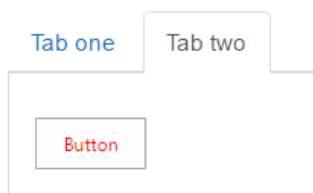
Allowed User Groups:

Allowed User(s):

[Remove](#)

Button

With this function you can execute a JavaScript event when a button is clicked.



The button appearance can be also customized with css styles.

Control properties:

Title:

JS OnClick:

```
1
2
3     alert('clicked')
4
5
```

CSS class:

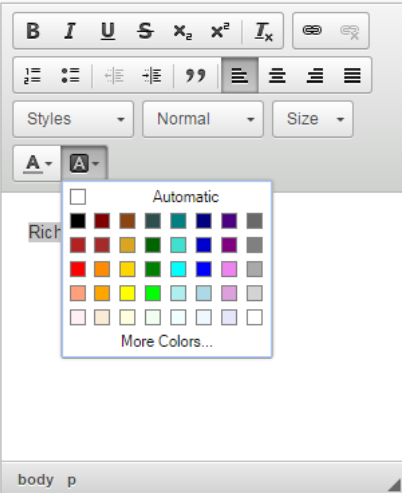
CSS style:

Text

Type your text and optionally change its style rich text formatting. You can add a link to your text as well.

Control properties:

Text:



The image shows a rich text editor toolbar with various icons for bold, italic, underline, strikethrough, subscript, superscript, and text color. Below the toolbar is a color picker dialog with a grid of color swatches and a 'More Colors...' link. The text area below the toolbar is empty.

Security properties:

Show to all users

Show to selected groups and users

Allowed User Groups:

Allowed User(s):

Image

SharePoint Forms for SharePoint 2013 allows you to add images to your SharePoint form. You need to paste the image address in the “URL” field.



Also, can add custom CSS styles to images.

Control properties:

URL:	<input type="text" value="/Content/images/SITEICON.PNG"/>
CSS class:	<input type="text"/>
CSS style:	<input type="text"/>

HTML


You can create in this field any interactive HTML-based controls.

Control properties:

Html:	<input type="text"/>
1	
2	Html
3	

Form name

You can use this field to display form name or type any other header.

Settings	Import & Ex
Form Name	
	

White space

Use this control to add empty space to your SharePoint Form. For example, if you need to divide some fields from others.

The screenshot shows a SharePoint form editor interface. At the top, there are three tabs: 'General' (selected), 'Details', and 'Links'. Below the tabs, there is a 'Title *' label followed by an empty text input box. At the bottom left of the form, there is the Virtosoftware logo, which consists of a red stylized 'V' icon followed by the text 'VIRTO SOFTWARE'.

You are able to define white space size manually.

Control properties:

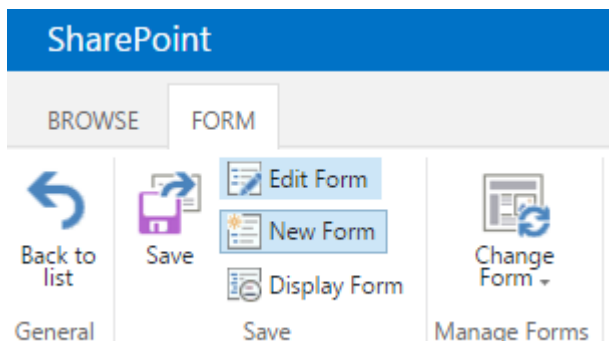
Height (px):

Saving SharePoint form

You can create SharePoint forms for following form views:

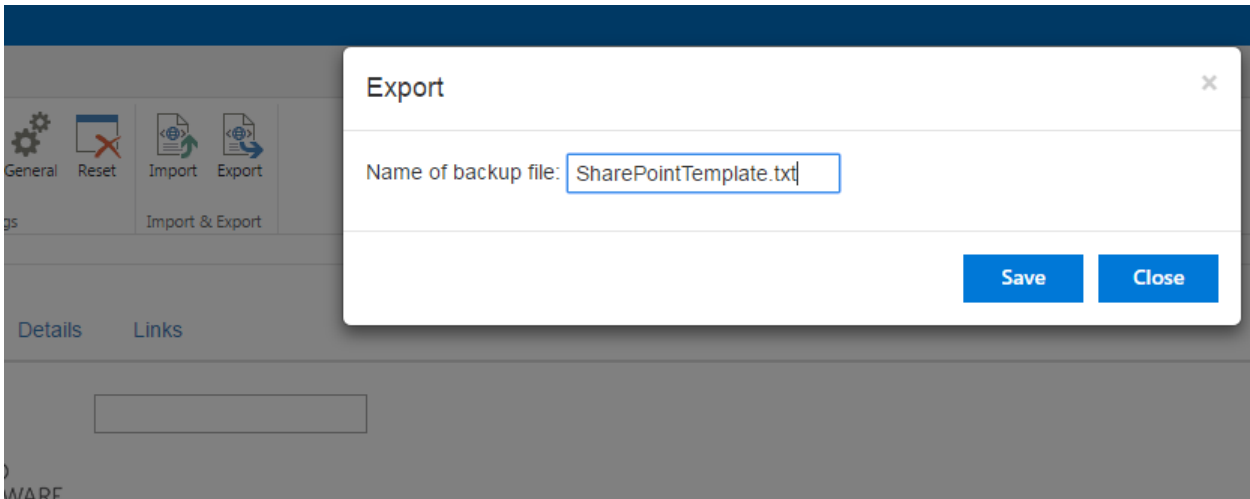
- Edit form
- New form
- Display form.

Select required views by clicking on them and save to appoint a created form to chosen view. You can choose two of views if you will make them identical or apply your form to all views.

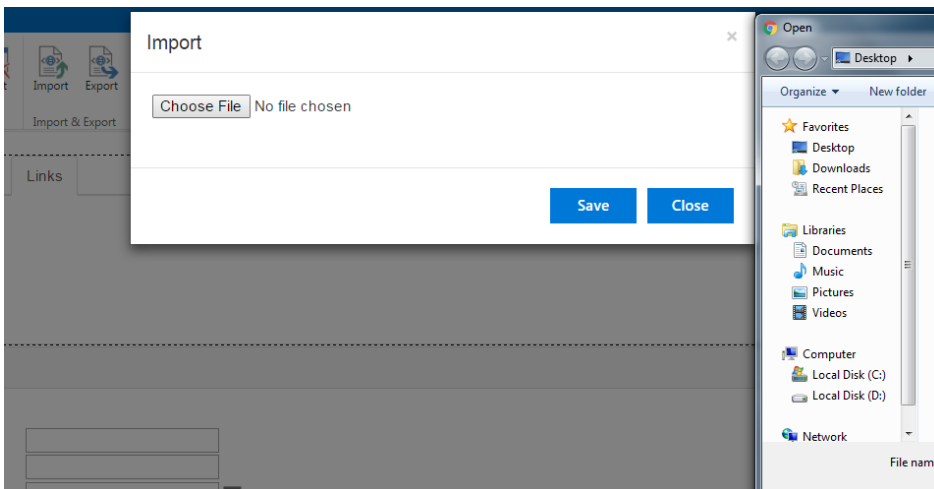


SharePoint form templates

You are able to save created SharePoint form template and use it later for any other list or library. Click “Export” button on the ribbon and save template in .txt format.



Choose “Import” button to apply saved form to a new form.



Other settings on ribbon

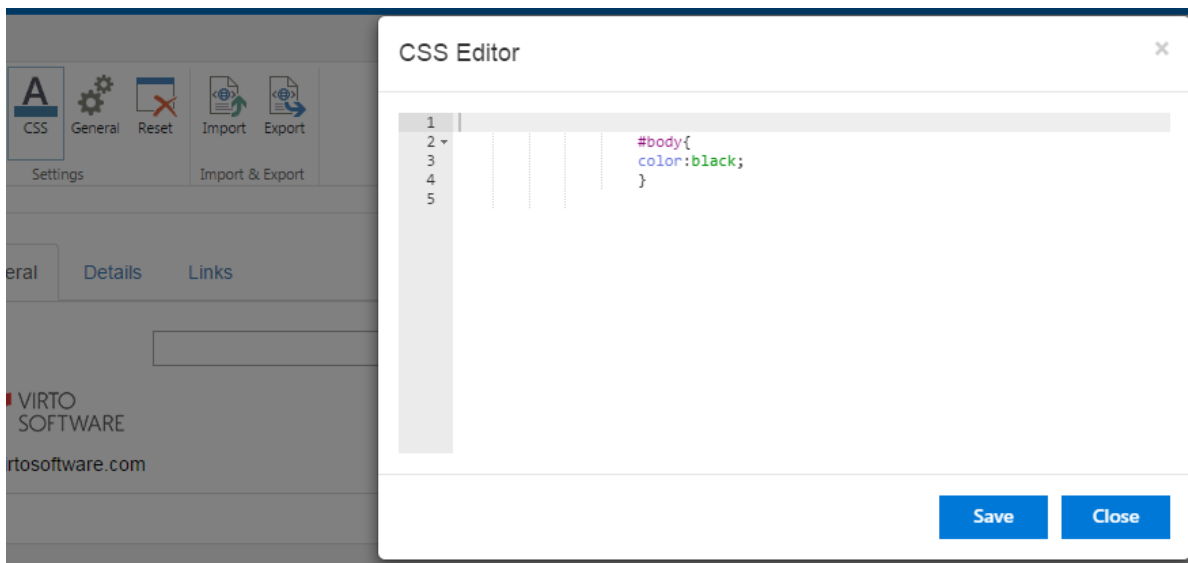
Javascript editor

Use Javascript editor to type and run your javascript code inside this editor.

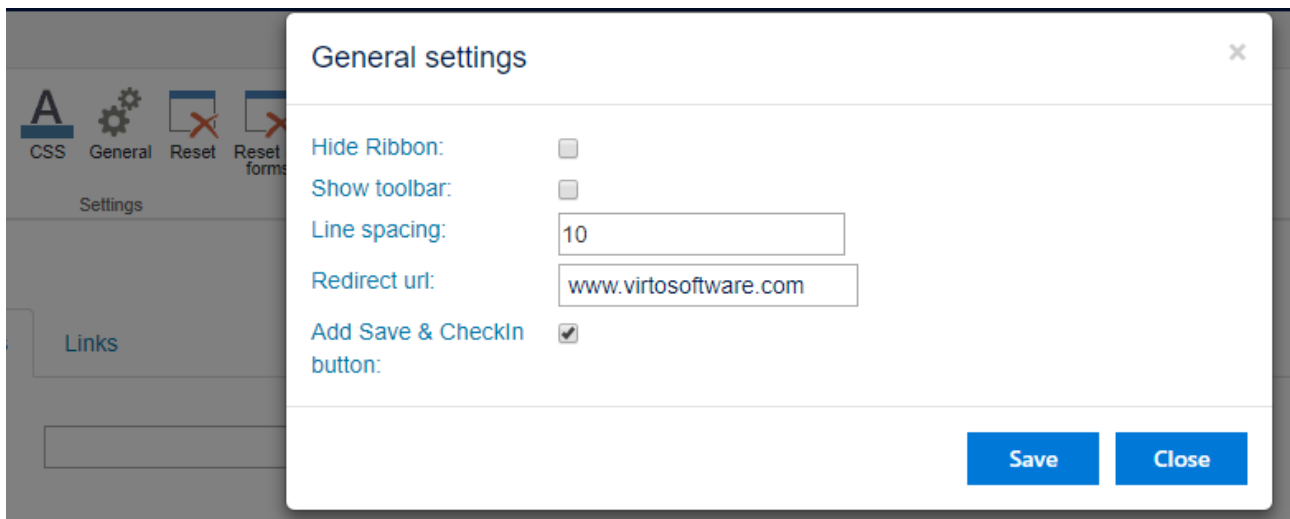


Css editor

Use Css editor to create your own css conditions and customize your SharePoint Form appearance. When you have finished editing your CSS, be sure to save changes.



General settings



You can customize line spacing to define vertical distance between elements in your form.

Checkbox “Hide ribbon” allows you to remove default SharePoint ribbon from a SharePoint site with designed form.

Checkbox “Show toolbar” to display default SharePoint managing settings above your form.


Standard Edit form in SharePoint Forms for SharePoint 2013.

Edit form in SharePoint Forms for SharePoint 2013 with toolbar and hidden ribbon.

Attach File | Delete Item | Spelling...

General Details Links

Title *

 **VIRTO SOFTWARE**
www.virtosoftware.com

Dev

SEO

Key words

Bundle

Price

Free trial

Sales

Created at 3/17/2016 6:19 AM by administrator
Last modified at 4/19/2016 2:57 AM by administrator

Redirect url option allow you to set an URL address for users to redirect them after saving a new or edit form. In other case, they will be redirected back to the edited SharePoint list.

General settings

Hide Ribbon:

Show toolbar:

Line spacing:

Redirect url:

Add Save & CheckIn button:

“Add Save & CheckIn button” option can be applied if a list where you add a form uses Check-Out feature. In this case, you can just save or save and check-in an item after working with it in form view.

Save Cancel Paste Copy Delete Item Bulk Upload Spelling

Commit Clipboard Actions Spelling

Home Documents Recent

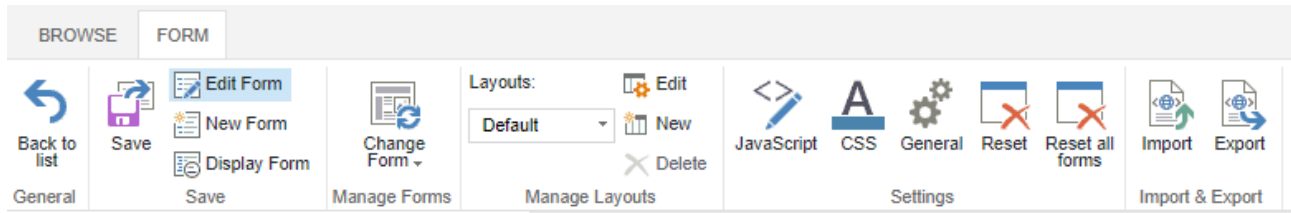
Name * .PNG

Date and Time 09: 10

Download Attachements Lib2

Reset

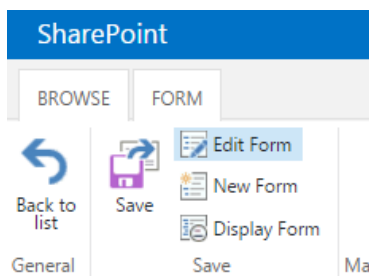
Reset button allows you to remove all controls from a current form view. “Reset all forms” helps to reset all existing form views for different content types.



Save

Click “Save” to save settings and finish adjustment of a chosen form.

Then go back to the SharePoint page with chosen list. New form will appear in all designed item views of chosen list.



Layouts

You can create custom form views for distinct users\groups. This feature is essential to secure the company's sensitive information and allow access to certain data for users with permissions only. Also, the layouts improve usability by displaying the same list's form for each department.

For example, create a form for Dev department. You can start with default view and align all form controls as needed.

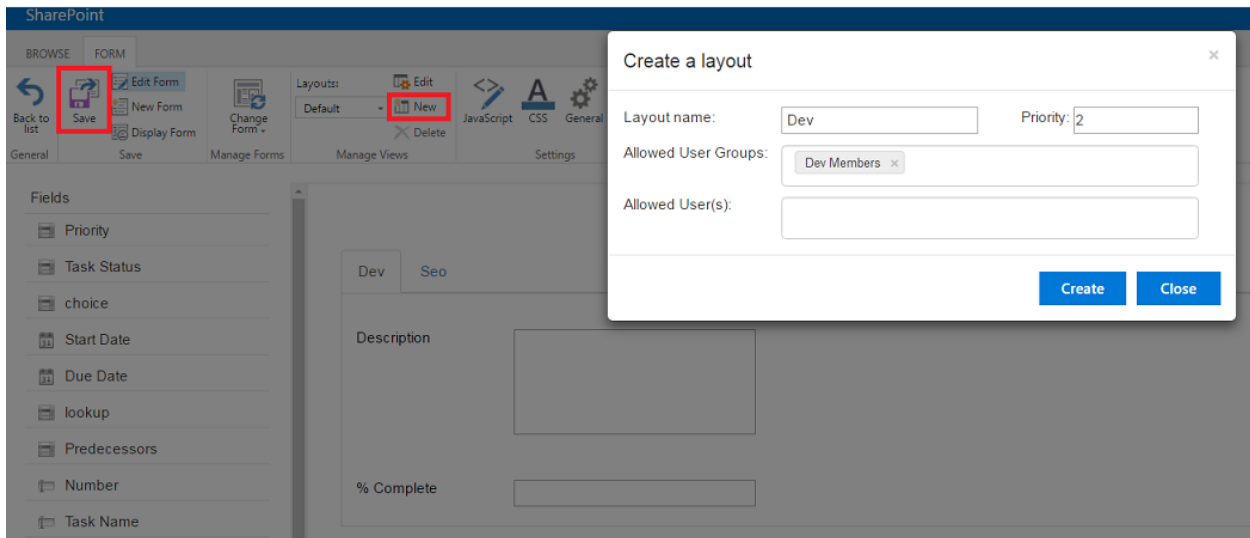
Then click Save.

On the next step click “New” in the Layouts on ribbon and create a layout.

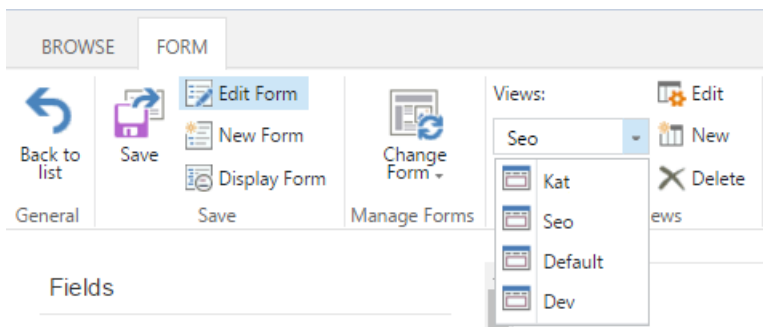
Here you can define the name of layout, set the list of groups and users with permission to view this layout.

Note: If defined conditions allow a user to have access to several layouts, the view with highest access priority will be displayed.

The smaller the number, the higher the priority.



Now you can edit several layouts in SharePoint Forms Designer.



Using Designed Form on a SharePoint Site

When you have adjusted a list form, it will be displayed on a SharePoint site in chosen list item views. This form can be used by SharePoint site users according to the rights provided by site administrator.

Now a SharePoint user can fill out this form on the page.

Edit Form


Virto Form Designer List

[+ new item](#) or edit this list

All Items ...

✓ Title	Compatibility	Documentation
Calendar Web Part	... SharePoint 2013, 2010 or 2007	http://www.virtosoftware.com/ma
Workflow Activities Kit	... SharePoint 2013, 2010 or 2007	http://www.virtosoftware.com/microsoft-sharepoint-designer

General Details **Links**



[Download trial](#)

www.virtosoftware.com

Dev

SEO

Key words

Documentation

Free trial

Managers

Attachments

Create form

General **Details** Links

Title *

Price

Dev

Compatibility

Version

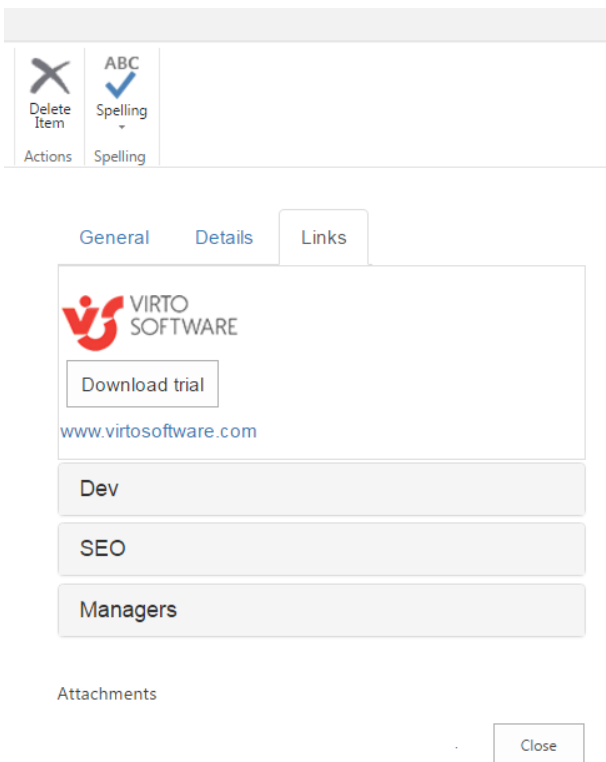
Release date

SEO

Managers

Created at 3/24/2016 11:42 PM by
Last modified at 3/24/2016 11:42 PM by

Display form



The screenshot shows a SharePoint display form for a list item. At the top, there is a header bar with two buttons: "Delete Item" (with a red X icon) and "Spelling" (with a blue checkmark and "ABC" icon). Below the header, there are three tabs: "General", "Details", and "Links". The "General" tab is active and displays the "VIRTO SOFTWARE" logo, a "Download trial" button, and the URL "www.virtosoftware.com". Below the URL, there are three text boxes containing the text "Dev", "SEO", and "Managers". At the bottom of the form, there is an "Attachments" section and a "Close" button.

This way you can organize adding information to SharePoint lists with a special form designed with Virto SharePoint Forms.

Version Release History

Version	Release Date	Description
v.1.3.14	08/21/2018	[+] Added ability to place field name above the field value
v.1.3.13	08/16/2018	[+] Added ability to reset all forms for all content types
v.1.3.11	05/17/2018	[+] Added DateTime format ability for Display Forms
v.1.3.10	05/07/2018	[+] Added Save & CheckIn button for documents Edit Form
v.1.3.0	07/13/2017	[+] Added themes for Tabs and Accordions.
v.1.2.16	04/14/2017	[-] Fixed the Rich Text box control
v.1.2.15	04/06/2017	[-] Fixed Comments field in new form
v.1.2.14	03/21/2017	[+] Added support for Comments field
v.1.2.13	03/09/2017	[+] Fixed the issue with button permission
v.1.2.12	03/07/2017	[+] Added support for "BusinessData" field type
v.1.2.11	03/03/2017	[-] Fixed the issue with checkbox styles
v.1.2.10	02/22/2017	[-] Fixed issue with read-only tabs
v.1.2.9	02/20/2017	[-] Fixed the feature of the security fields
v.1.2.8	02/15/2017	[-] Fixed a js code in button control
v.1.2.7	02/13/2017	[-] Fixed the js replace method for ie
v.1.2.6	02/08/2017	[-] Fixed js code in button control
v.1.2.5	01/26/2017	[-] Fixed form creation with special fields
v.1.2.4	01/19/2017	[-] Fixed a form after field removing
v.1.2.3	12/20/2016	[-] Added support for "TaxonomyFieldTypeMulti" field type
v.1.2.2	12/15/2016	[-] Fixed read only fields in the new form
v.1.2.1	12/13/2016	[-] Fixed read only permission
v.1.2.0	12/10/2016	[+] Added forms view.
v.1.1.0	10/12/2016	[*] Updated the "Drag & Drop" algorithm. [-] Fixed text component rendering
v.1.0.6	09/20/2016	[-] Fixed web parts connection on Edit Page
v.1.0.5	09/06/2016	[-] Fixed connection of web parts
v.1.0.4	08/16/2016	[-] Fixed save of data CSS and General settings [-] Fixed save Form Name control
v.1.0.3	08/11/2016	[-] Fixed registration feature activation
v.1.0.2	07/22/2016	[+] Added support "Virto cross site lookup" field type
v.1.0.1	02/06/2016	[-] Fixed user field bug
v.1.0.0	01/30/2016	First release