



# **Virto SharePoint Forms Designer for SharePoint 2013**

## **Installation and User Guide**

# Table of Contents

<b>KEY FEATURES .....</b>	<b>3</b>
<b>SYSTEM REQUIREMENTS .....</b>	<b>3</b>
<b>INSTALLATION .....</b>	<b>3</b>
<b>INSTALLING VIRTO SHAREPOINT FORMS FOR SHAREPOINT 2013 .....</b>	<b>3</b>
<b>LICENSE ACTIVATION .....</b>	<b>6</b>
<b>UPGRADING VIRTO SHAREPOINT FORMS FOR SHAREPOINT 2013 .....</b>	<b>6</b>
<b>UNINSTALLING VIRTO SHAREPOINT FORMS FOR SHAREPOINT 2013 .....</b>	<b>7</b>
<b>VIRTO SHAREPOINT FORMS FOR SHAREPOINT 2013 ADMINISTRATION AND USAGE .....</b>	<b>8</b>
<b>SHAREPOINT FORMS FOR SHAREPOINT 2013 .....</b>	<b>8</b>
<b>ADDING NEW FORM .....</b>	<b>8</b>
<i>Permissions .....</i>	<i>12</i>
<i>Adding sections from basic controls .....</i>	<i>13</i>
Tabs .....	13
Accordions .....	13
Hyperlink .....	14
Button .....	15
Text .....	16
Image .....	16
HTML .....	17
Form name .....	17
White space .....	18
<i>Saving SharePoint form .....</i>	<i>18</i>
<i>SharePoint form templates .....</i>	<i>19</i>
<i>Other settings on ribbon .....</i>	<i>19</i>
Javascript editor .....	19
Css editor .....	20
General settings .....	20
Reset .....	22
Save .....	22
<b>USING DESIGNED FORM ON A SHAREPOINT SITE .....</b>	<b>22</b>
<b>VERSION RELEASE HISTORY .....</b>	<b>25</b>

# Virto SharePoint Forms for SharePoint 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 for SharePoint 2013

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.

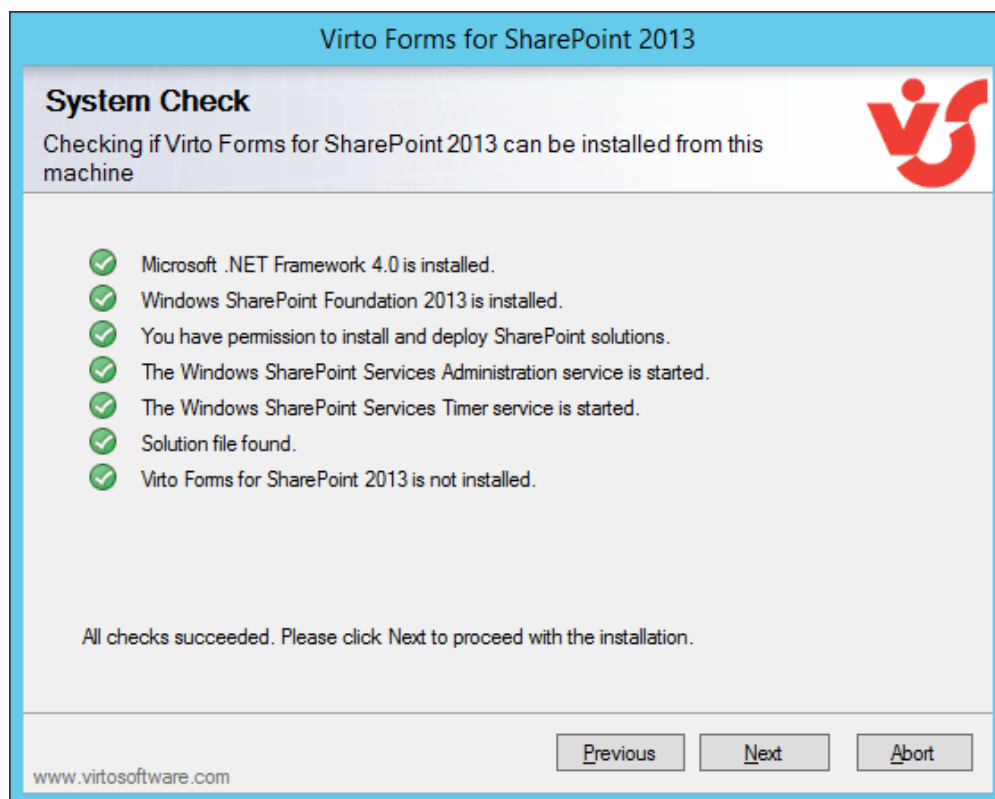
Virto SharePoint Forms for SharePoint 2013 setup program provides links to the various installation components for SharePoint Forms for SharePoint 2013.

To access SharePoint Forms for SharePoint 2013 Setup program download **Virto.SharePoint.FormsDesigner.X.X.zip** file and unzip it. Open folder and run extracted Setup.exe file.

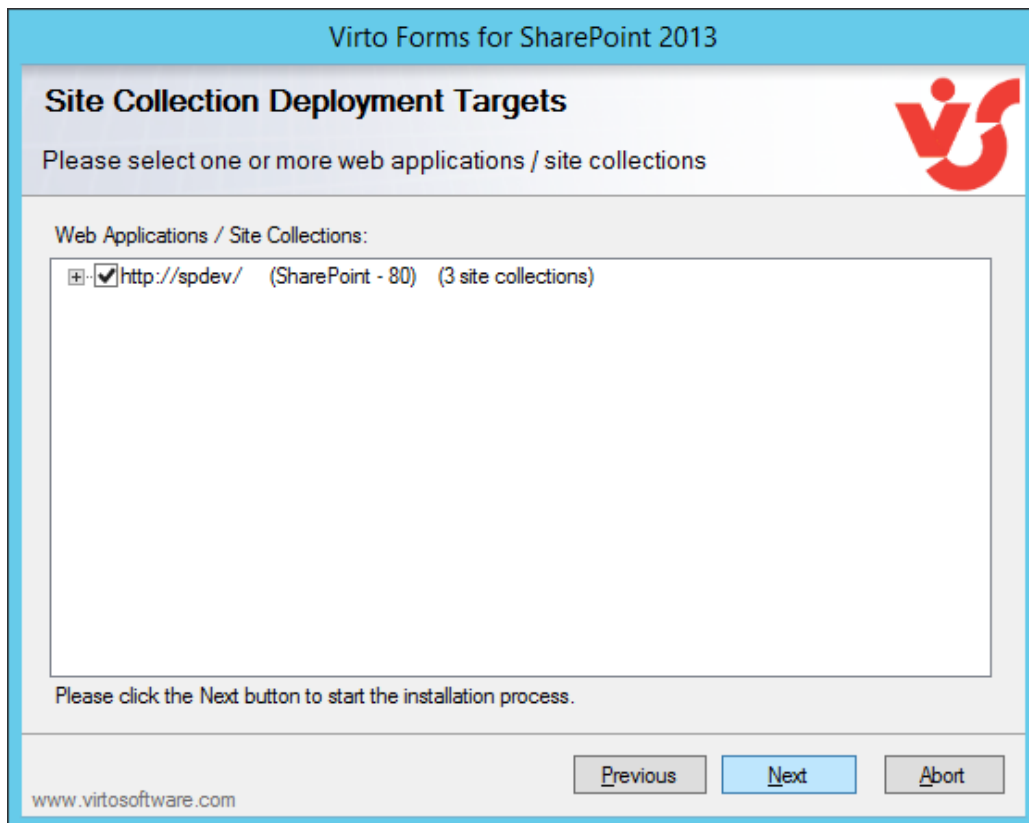
The setup wizard window will appear.



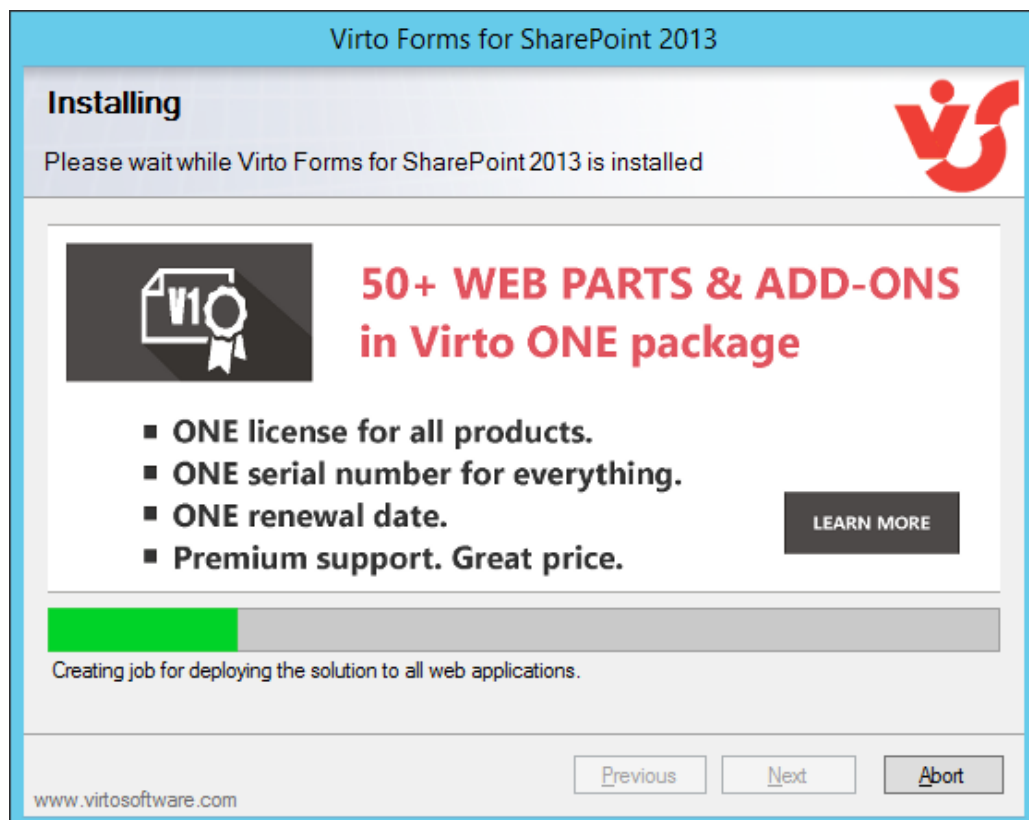
SharePoint Forms Designer setup wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click "Next".



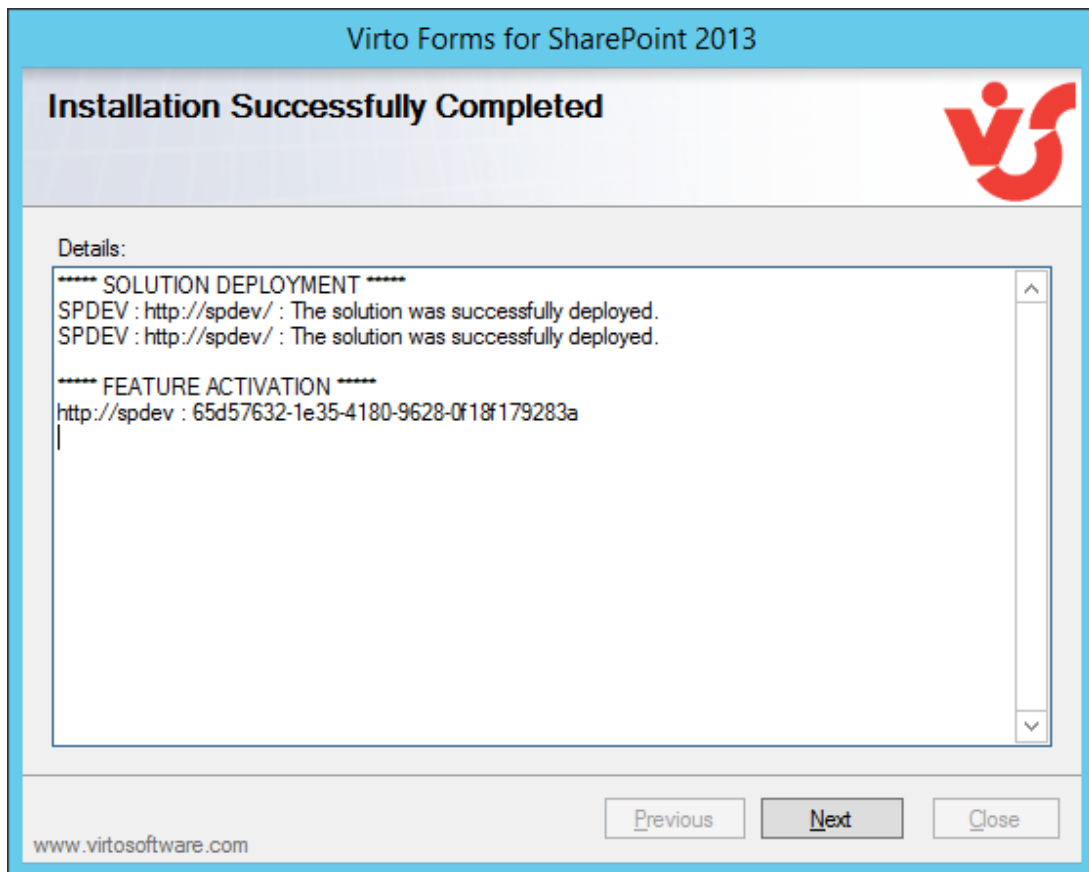
Select the web application(s) where you want to install the product.



**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 for SharePoint 2013

If you already use SharePoint Forms for SharePoint 2013 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.

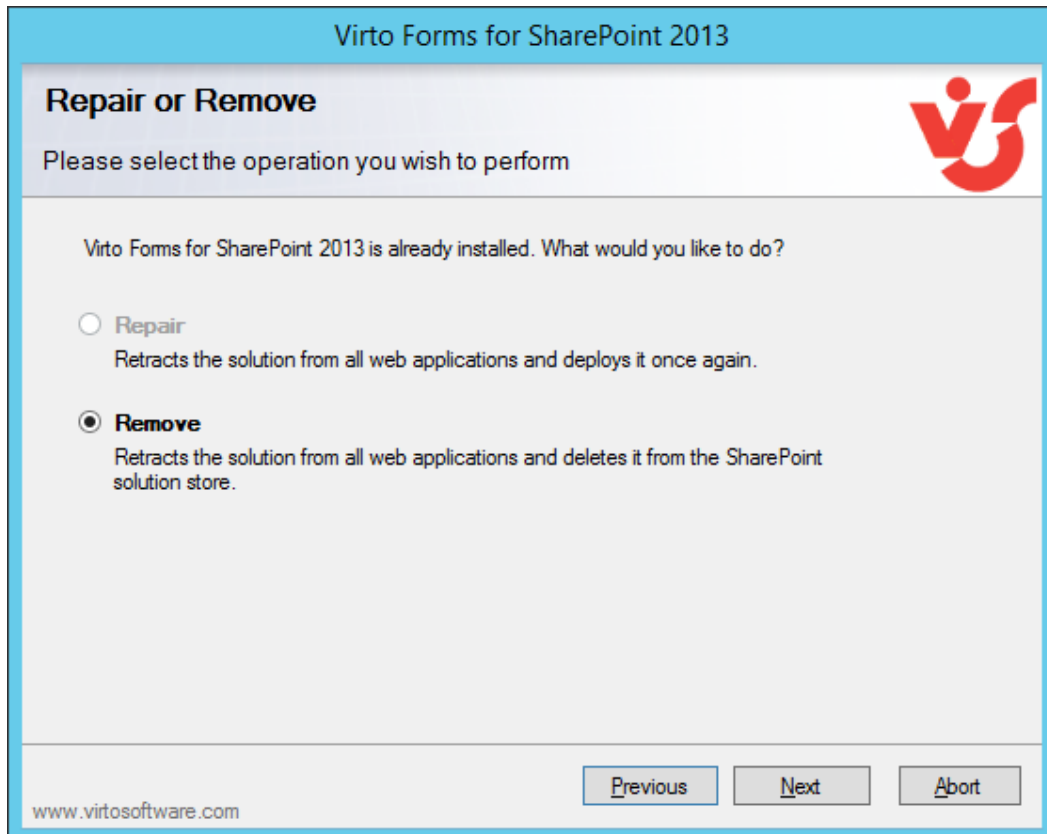
On the step check the box “Upgrade” and click “Next”.

**Note:** if you had activated the license while installing the previous Virto SharePoint Forms for SharePoint 2013 version, you do not need to activate it now.

## Uninstalling Virto SharePoint Forms for SharePoint 2013

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".



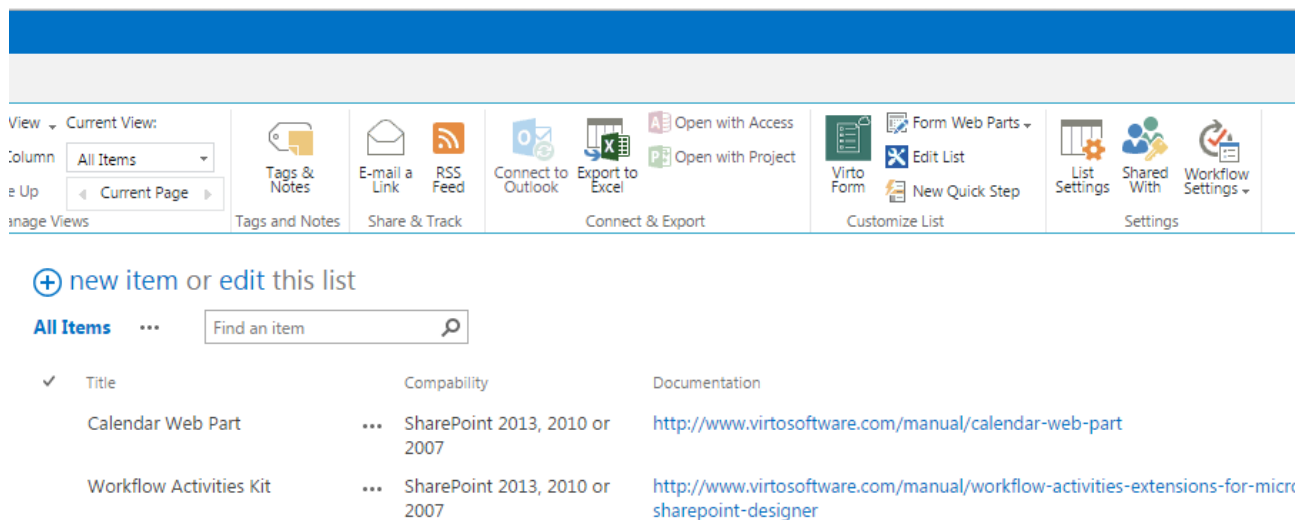
**Note:** after uninstalling Virto SharePoint Forms for SharePoint 2013, all the settings applied to SharePoint lists with the component will be removed.

# Virto SharePoint Forms for SharePoint 2013 Administration and Usage

## SharePoint Forms for SharePoint 2013

### *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 for SharePoint 2013 will be opened in the new window.

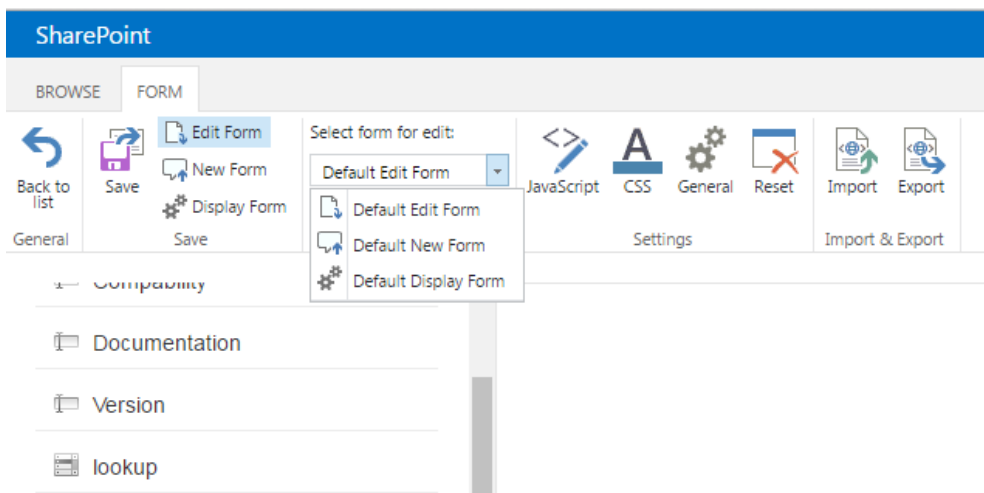


On Virto SharePoint Forms for SharePoint 2013 page use dropdown “Select form for edit” to create a new form.

3 form types are available:

- Default edit form
- Default new form
- Default display form

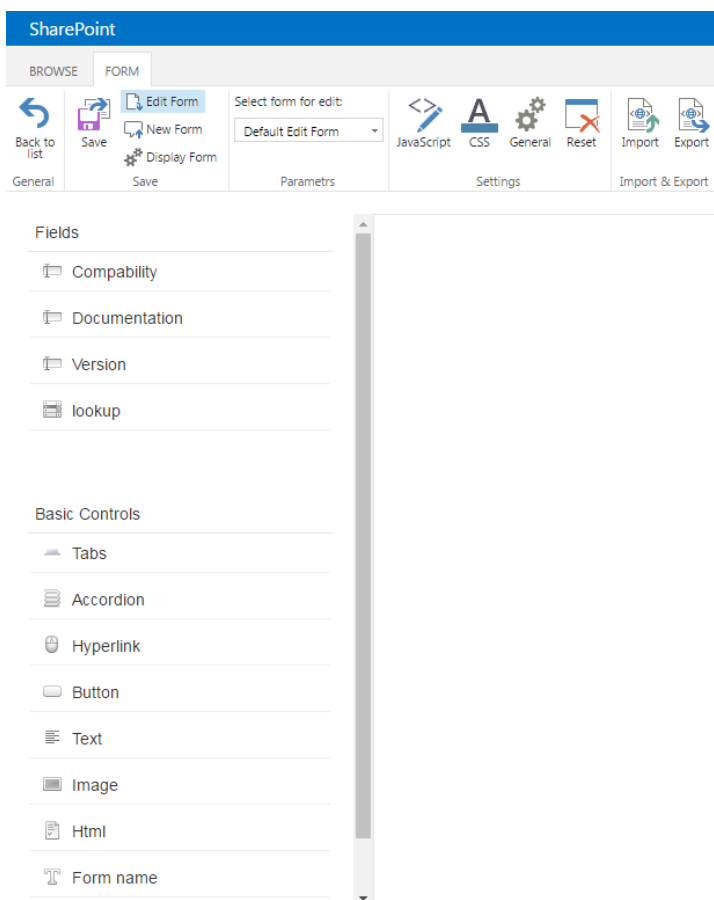




For example, you can open edit form to start creating a new form for list items editing. Actually, you can use any other default form view to start working with Virto SharePoint Forms for SharePoint 2013.

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

Basic controls for SharePoint form creating are located below.



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

The interface is divided into two main sections. On the left, there is a list of fields and basic controls. The 'Fields' section includes: Text, Documentation, Bundle, Free trial, Key words, Price, Version, Last release date, and Lookup. The 'Basic Controls' section includes: Tabs, Accordion, and Hyperlink. On the right, a preview of a 'Tabs' control is shown. It has two tabs: 'Tab one' and 'Tab two'. The 'Tab two' is selected and contains a text input field with the text 'Title \*' and a text input field with the value 'www.virtossoftware.com'.

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

For example, you can type titles for both tabs and press “Save” button to save changes.

The 'Add tab' dialog box is open. It has a list of tabs on the left: 'general' and 'Tab two'. The 'Tab two' tab is selected. The dialog box contains the following fields and options:


- Control properties:**
  - Name:
- Security properties:**
  - ☒ Show to all users
  - ☐ Show to selected groups and users
  - Allowed User Groups:
  - Allowed User(s):

At the bottom of the dialog box, there are three buttons: 'Save', 'Cancel', and 'Remove'.

Also, you can change text color, style and size or add JavaScript link and CSS styles to chosen control to change its appearance.


**Field name:**

Text:

Font size:  

Font weight:

Font style:

Font color:  

Visibility: ☒

**Control properties:**

JS link:

CSS class:

CSS style:

Save

Cancel

[Remove](#)

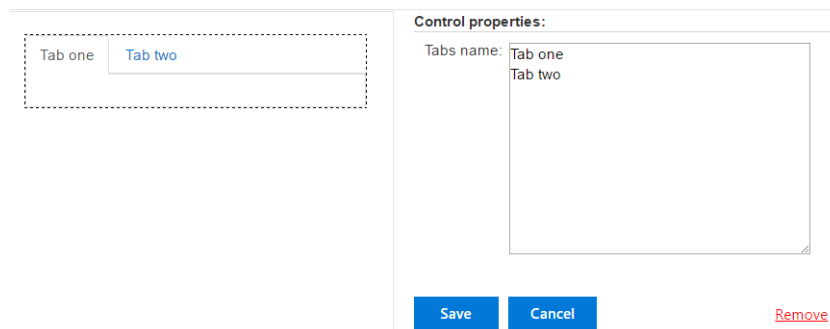
SharePoint Forms Designer allows you to define label text appearance of the list fields, using css class and custom styles. Also, you can hide label text by unchecking box “Visibility”.

You can add any amount of sections and fields from the current list and place them in several rows under each other or locate 3 elements in a single row.

You are able to locate in one row no more than 3 controls. But you can place only one control in a row inside Tabs and Accordions.



Remove chosen controls from your form by clicking “Remove” button or using drag and drop feature.



**Note:** You can't put accordion form in any tab, as well as it is forbidden to place a tab in accordion form.

**Note:** you can add any fields from the current list with no Read-only rights.

**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.

## 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

Allowed  
User  
Groups:

Allowed  
User(s):

Save

Cancel

[Remove](#)

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

Allowed  
User  
Groups:

B&R Members × B&R Visitors ×  
 B&R Owners ×

Allowed  
User(s):

ale

Alex Shell

Save

Cancel

[Remove](#)

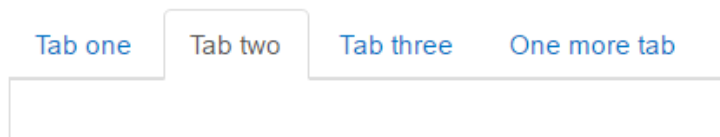
**Note:** The required fields marked with \* are always visible for all users.

**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

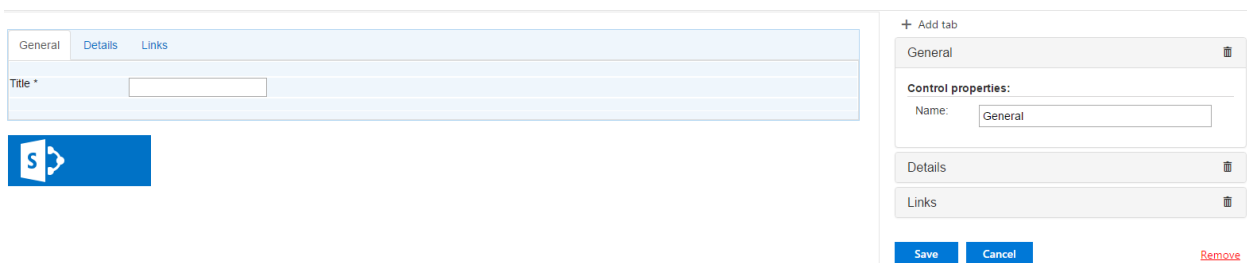
You can create multiple tabs to optimize your SharePoint form view.



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, excepting Accordions.



### Accordions


An accordion can contain any other controls, excepting Tabs.



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  
 Allowed User Groups:   
 Allowed User(s):

Section two 

[Remove](#)

## Hyperlink

You are able to add links to your SharePoint Forms.

Tab one

Tab two

[www.virtossoftware.com](http://www.virtossoftware.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:

Text:

Font size:  

Font weight:

Font style:

Font color:  

**Security properties:**

☒ Show to all users

☐ Show to selected groups and users

Allowed User Groups:

Allowed User(s):

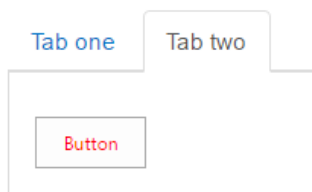
Save

Cancel

[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:**

JS-On Click:

Title:

CSS class:

CSS style:

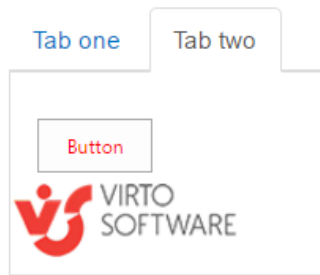
Save

Cancel

[Remove](#)







Also, can add custom CSS styles to images.

#### Control properties:

URL:

CSS class:

CSS style:

Save

Cancel

[Remove](#)

## HTML

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

#### Control properties:

Html: 

1	
2	
3	

CSS class:

CSS style:

Save

Cancel

[Remove](#)

## 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.

You are able to define white space size manually.

### Control properties:

Height (px):

Save

Cancel

[Remove](#)

## Saving SharePoint form

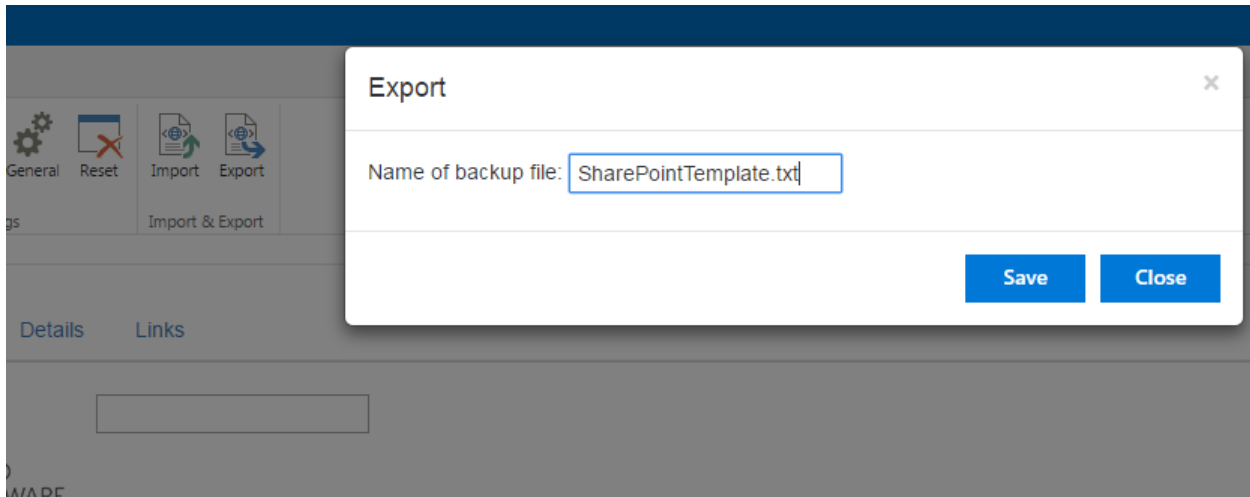
You can create SharePoint forms for following form views:

- Edit form
- New form
- Display form.

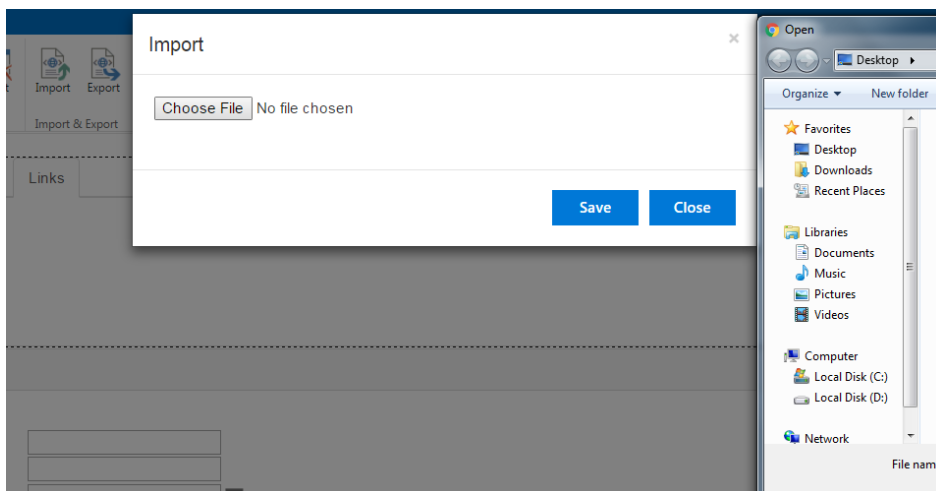
Select required views by clicking on them and save to appoint a created form to chosen view. You can choose two of views if you will make them identical or apply your form to all views.

## 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.



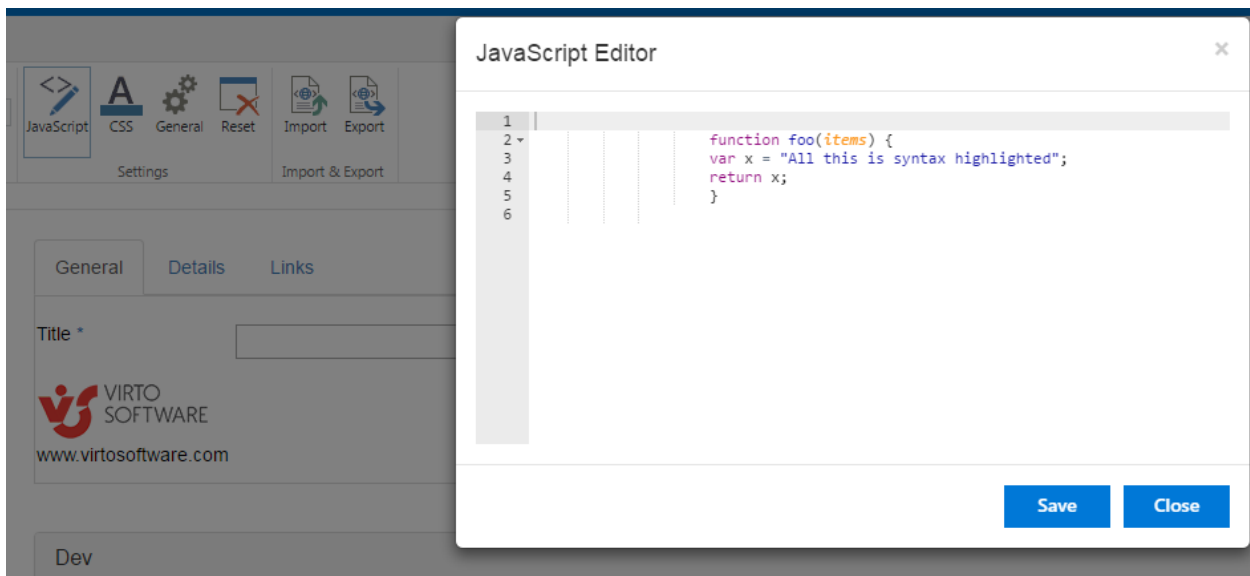
Choose “Import” button to apply saved form to a new form.



## Other settings on ribbon

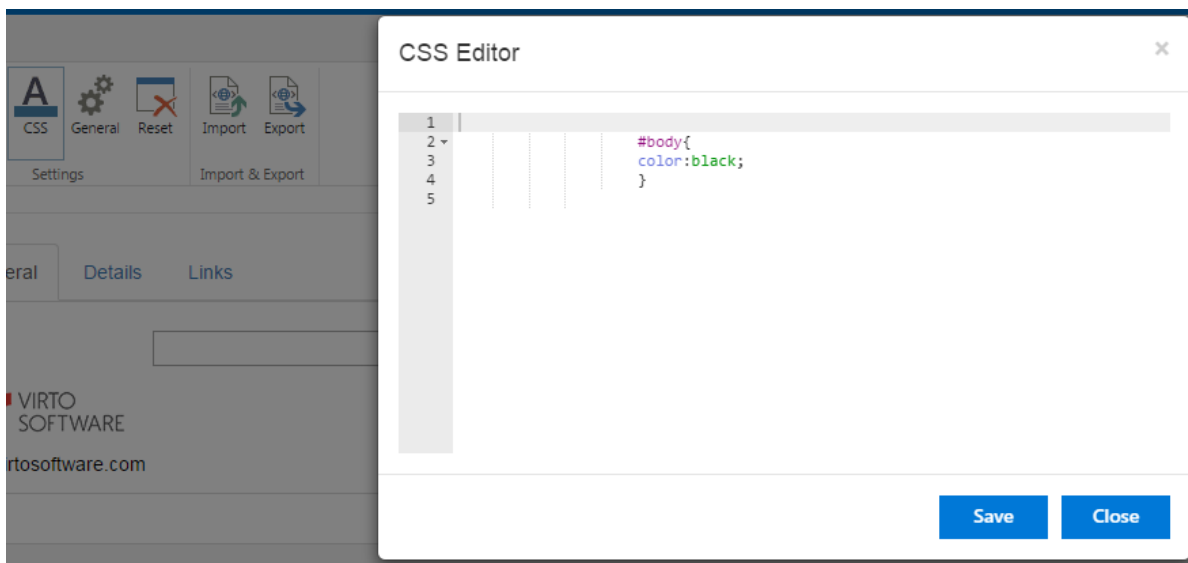
### Javascript editor

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

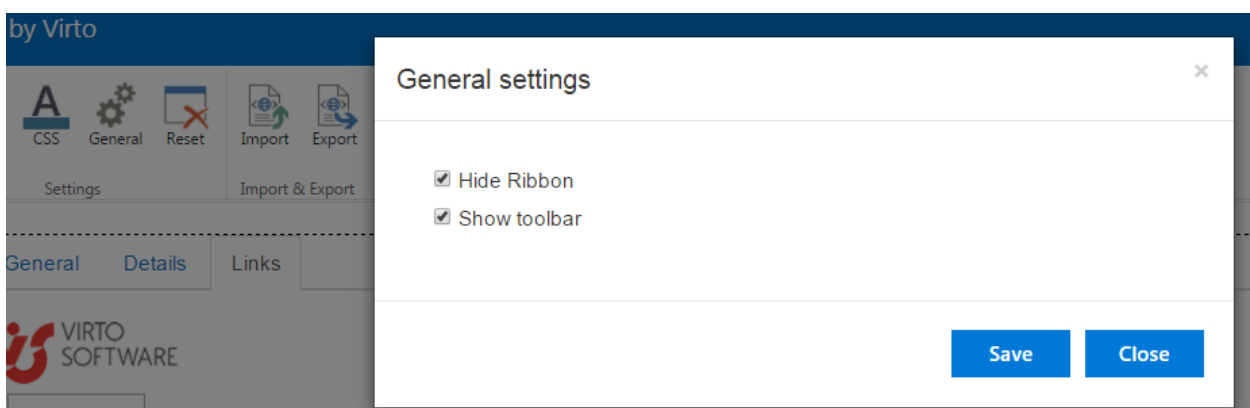


## Css editor

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



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.

Delete Item Attach File Spelling

Actions Spelling

General Details Links

Title \* Calendar Web Part

 VIRTO SOFTWARE  
www.virtosoftware.com

Dev

SEO

Key words sharepoint calendar

Bundle Collaboration

Price 899

Free trial ☒

Sales

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


Save Cancel

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

Attach File Delete Item Spelling...

General Details Links

Title \* Calendar Web Part

 VIRTO SOFTWARE  
www.virtosoftware.com

Dev

SEO

Key words sharepoint calendar

Bundle Collaboration

Price 899

Free trial ☒

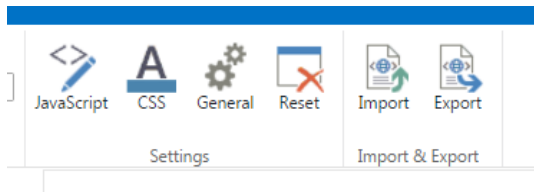
Sales

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

Save Cancel

## Reset

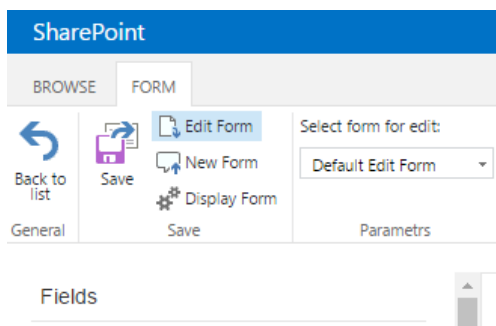
Reset button allows you to remove all controls from a current form view.



## 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.



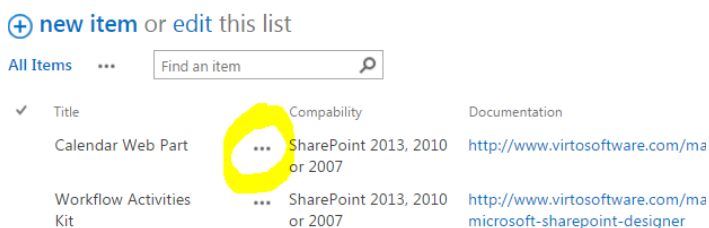
## Using Designed Form on a SharePoint Site

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



General Details Links



Download trial

[www.virtosoftware.com](http://www.virtosoftware.com)

Dev

SEO

Key words

Documentation

Free trial ☒

Managers

Attachments

Save Cancel

## Create form

General Details Links

Title \*

Price

Dev

Compability

Version

Release date



SEO

Managers

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

Save Cancel

## Display form


 Delete Item	 Spelling
Actions	Spelling

General

Details

Links

Download trial

  
[www.virtosoftware.com](http://www.virtosoftware.com)

Dev

SEO

Managers

Attachments

Close

This way you can organize adding information to SharePoint lists with a special form designed with Virto SharePoint Forms for SharePoint 2013.



## Version Release History

Release Date	Version	Description
03/25/2016	v. 1.0.0	First public release