



# **Virto DataGrid Web Part for Microsoft SharePoint**

**Release 1.2.0**



**User and Installation Guide**

# Table of Contents

OVERVIEW .....	3
SHORTLIST OF VIRTO DATAGRID KEY FEATURES.....	3
SYSTEM REQUIREMENTS .....	4
OPERATING SYSTEM .....	4
SERVER .....	4
BROWSER.....	4
INSTALLATION .....	4
INSTALLING VIRTO DATAGRID WEB PART FOR SHAREPOINT.....	4
LICENSE ACTIVATION.....	8
UPGRADING VIRTO DATAGRID WEB PART .....	8
UNINSTALLING VIRTO DATAGRID WEB PART.....	8
ADMINISTRATION AND USAGE .....	8
ADDING THE WEB PART TO A PAGE .....	8
DATAGRID WEB PART ADMINISTRATION AND USAGE .....	9
<i>Using SharePoint List for DataGrid</i> .....	9
<i>Using SQL Table for DataGrid</i> .....	12
<i>Nested Data Grids</i> .....	15
<i>Applying Filters to DataGrid</i> .....	18
<i>Default Page Size</i> .....	21
<i>Default Order Parameters</i> .....	21
<i>Actions with DataGrid</i> .....	22
VERSION RELEASE HISTORY .....	25

## Overview

Virto DataGrid web part for Microsoft SharePoint 2007, presented today by Virtosoftware, provides users with a wide range of tools for displaying items of SharePoint list and SQL items in a single grid view. With the new easy-to-install and simple-to-use web part users do not need to work with SharePoint Designer to make custom grids anymore.

Virto DataGrid is a ready-to-use Ajax-enabled JavaScript control that displays items from SharePoint lists (from a site or a site collection) or SQL items in a single grid. The web part enables displaying of any field from a list or a table, allowing for flexible ordering, sorting and resizing with drag & drop, supporting sub grids (2-nested level) and SharePoint Access Level, that prevents users with, for instance, “read only” rights for a specific list from editing the list data through the grid.

With the new Virto Ajax-based control SharePoint users get a plenty of interface-related features that make the work with data items effective and convenient. In addition to complex filtering, search as well as default and custom CSS themes you can easily change column order, resize column and the web part width, collapse and expand the grid, display and hide column footers, edit data and add new items with a few clicks.

## Shortlist of Virto DataGrid Key features

Feature	Status
Displaying SharePoint List or SQL Table items across SharePoint site or site collection	1.0.0
Showing 2-level nested sub grids within the parent grid	1.0.0
Inline and pop-up cell editing	1.0.0
Column ordering and resizing with a drag & drop	1.0.0
Ascending, descending and dynamic data sorting	1.0.0
Deleting and adding new rows	1.0.0
Deleting and adding new rows	1.0.0
Summary footer row (automatically calculated sums, averages, counts, min or max)	1.0.0
Exporting data to MS Excel	1.0.0
Default and custom CSS themes	1.0.0
Complex filtering	1.1.0
Search	1.0.0

## System Requirements

### Operating System

Microsoft Windows Server 2003 SP2 and 2008

### Server

#### Server

*SharePoint Release 2010:*

- Microsoft Windows SharePoint Foundation 2010 or Microsoft Office SharePoint Server 2010;
- Microsoft .NET Framework 3.5;

SharePoint Release 3:

- Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007;
- Microsoft .NET Framework 3.5.

**Note:** *This product is not compatible with SPS 2003 and WSS v2.*

### Browser

Microsoft Internet Explorer 7 or higher is required.

## Installation

This section describes how to install, upgrade, uninstall, or contact Support for the Virto DataGrid Web Part.

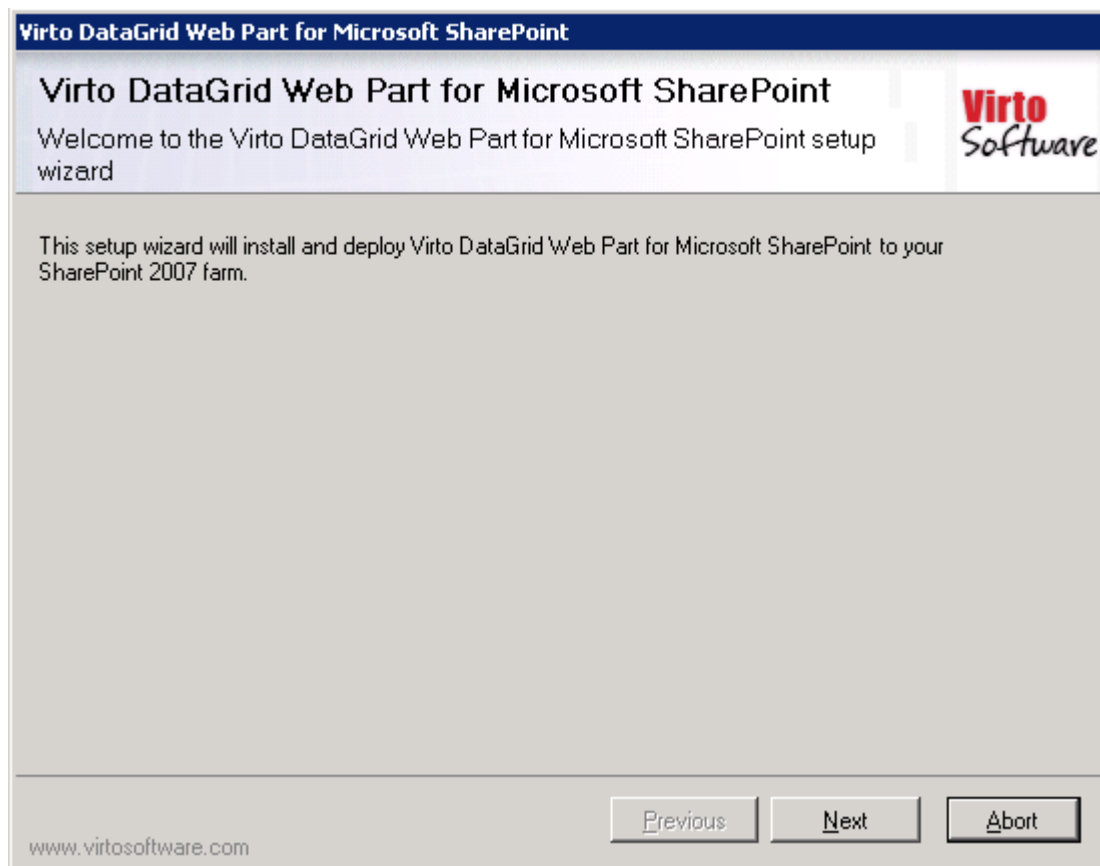
### Installing Virto DataGrid Web Part for SharePoint

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

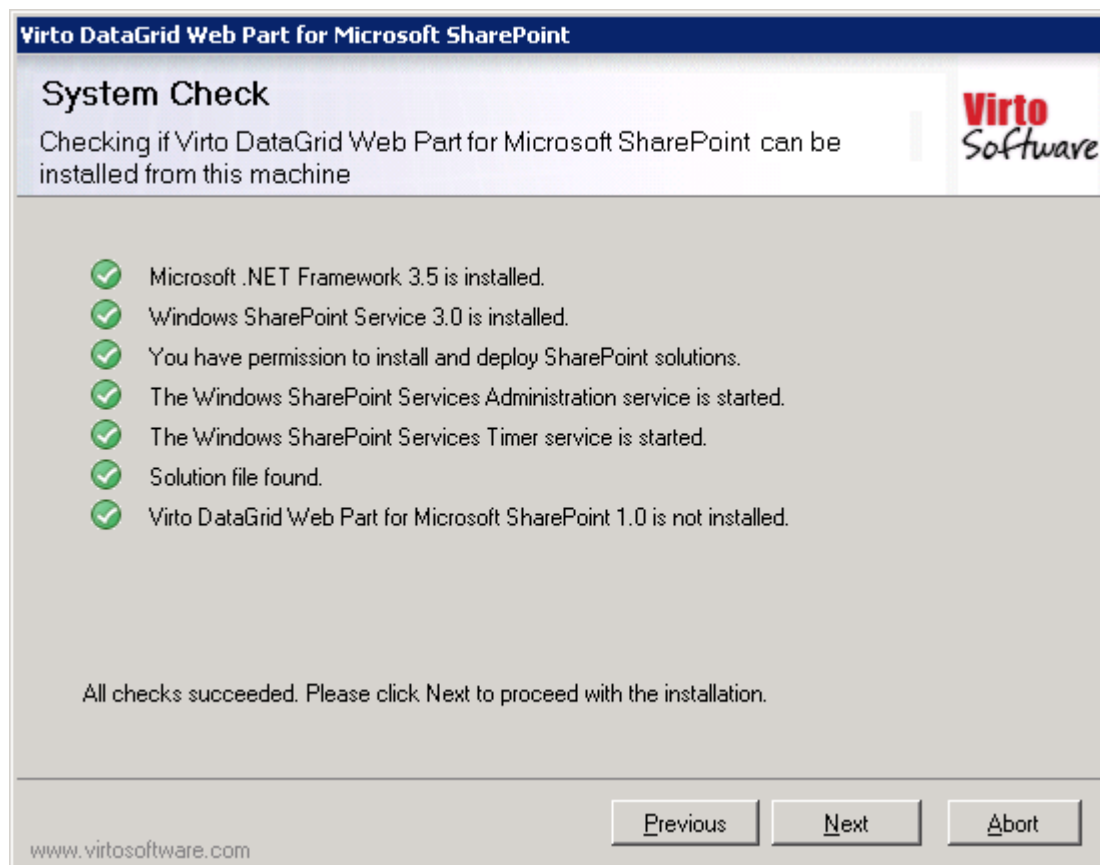
The Virto DataGrid Web Part setup program provides links to the various installation components for the DataGrid.

To access the Virto Alerts Customizer Setup program download **Virto.SharePoint.DataGrid.WebPart.zip** file and unzip it. Open **Virto.SharePoint.DataGrid.WebPart** folder and run extracted **Setup.exe** file.

The setup wizard window will appear.

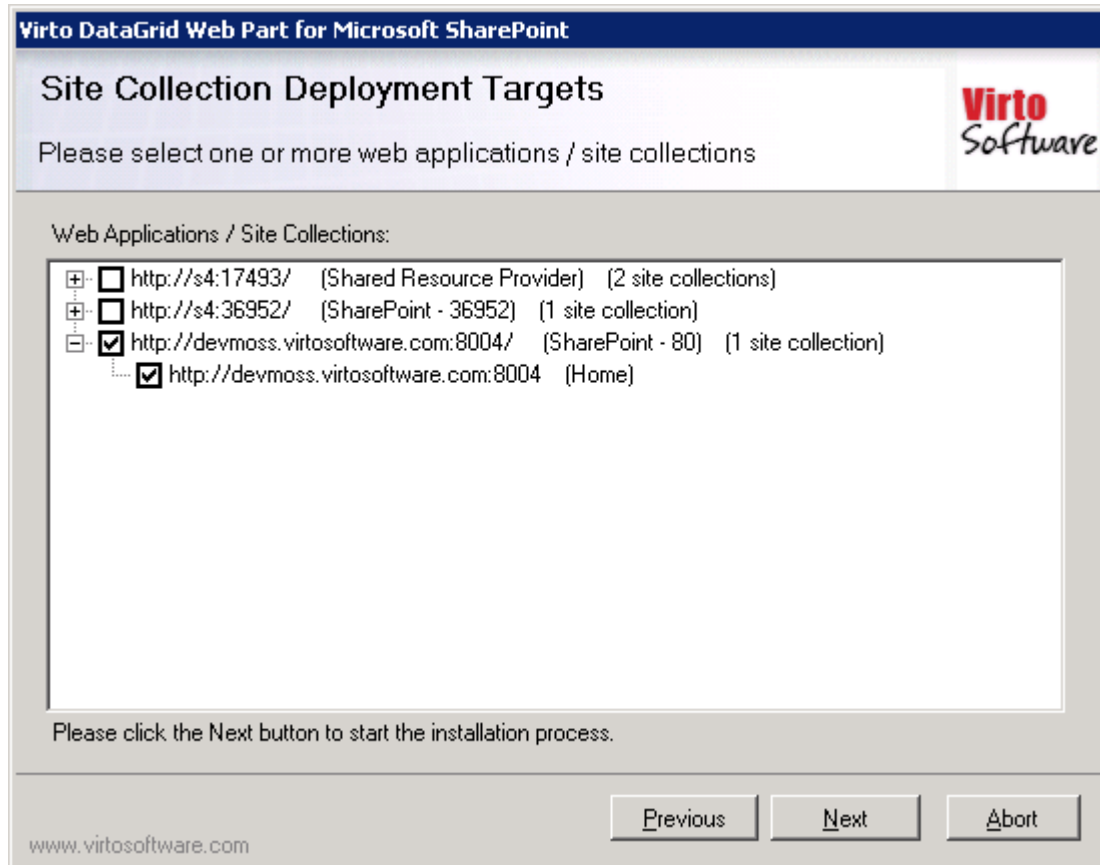


Virto DataGrid Web Part Setup wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click “Next”.

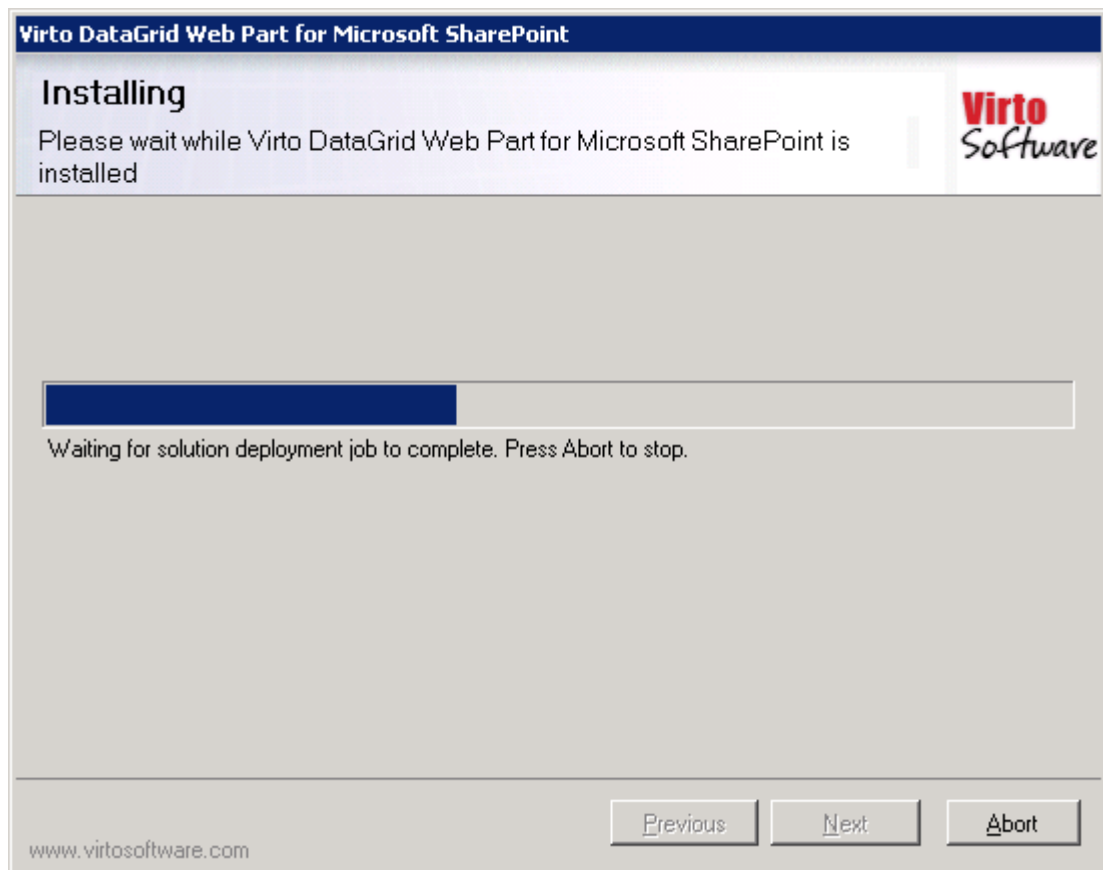


Select the web application(s) where you want to install the product.

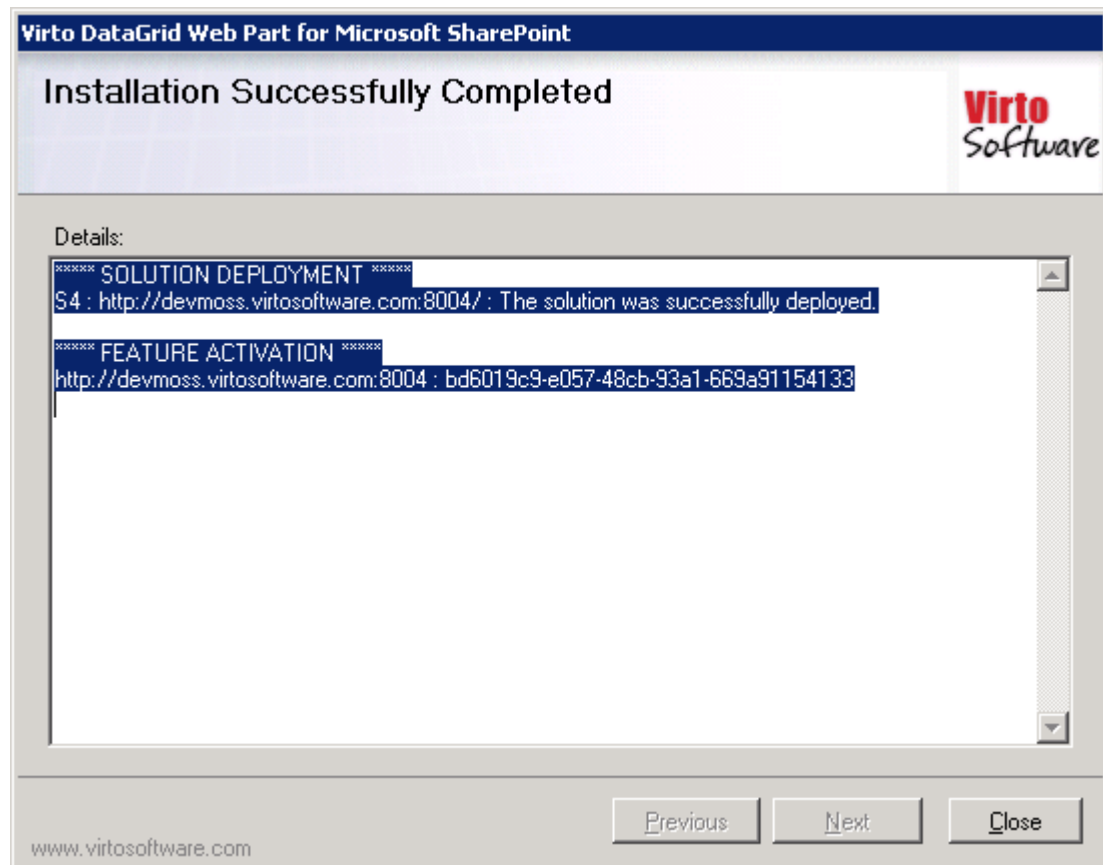
**Warning:** You must be logged in to the SharePoint server with a Site Collection Administrator account to automatically activate this feature.



Then click "Next".



Click "Close" to complete the installation.



## License Activation

To see full instruction for successful activation of your component, please download “Virto License Manager” PDF instruction from [Downloads](#) section of our site or read it in [Wiki](#).

## Upgrading Virto DataGrid Web Part

If you already use Virto DataGrid Web Part 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 Virto DataGrid Web Part* 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 3 check the box “Upgrade” and click “Next”.

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

## Uninstalling Virto DataGrid Web Part

To uninstall the Web Part:

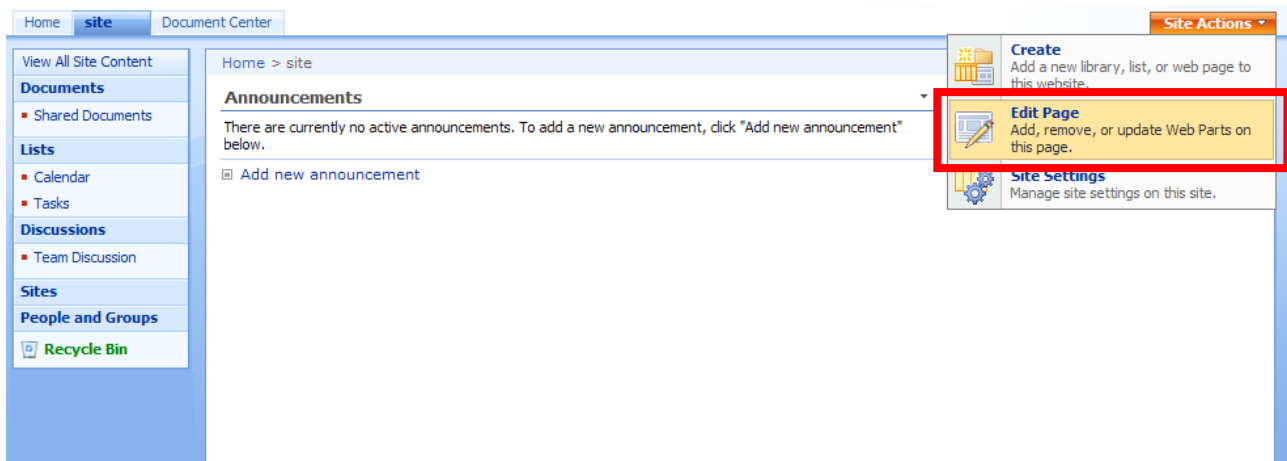
1. Double click the Setup.exe extracted from downloaded **Virto.SharePointData.Grid.WebPart.zip** file.
2. The program performs the system checks again. Once that has successfully completed, the program prompts you to Repair or Remove the solution. Select Remove, and click “Next”.

## Administration and Usage

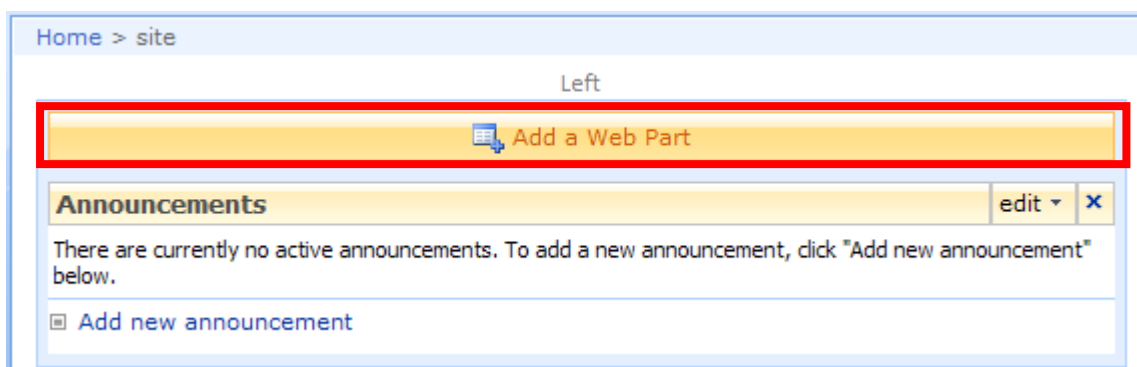
### Adding the Web Part to a Page

Go to SharePoint site where you want to add the web part and open “Site Actions - Edit page”.





You will switch to edit mode. Click “Add a Web Part”.



Select Virto DataGrid Web Part for SharePoint at the bottom of the list and click “Add”.

Once you have clicked “Add” button, use “Exit edit mode” button.

## DataGrid Web Part Administration and Usage

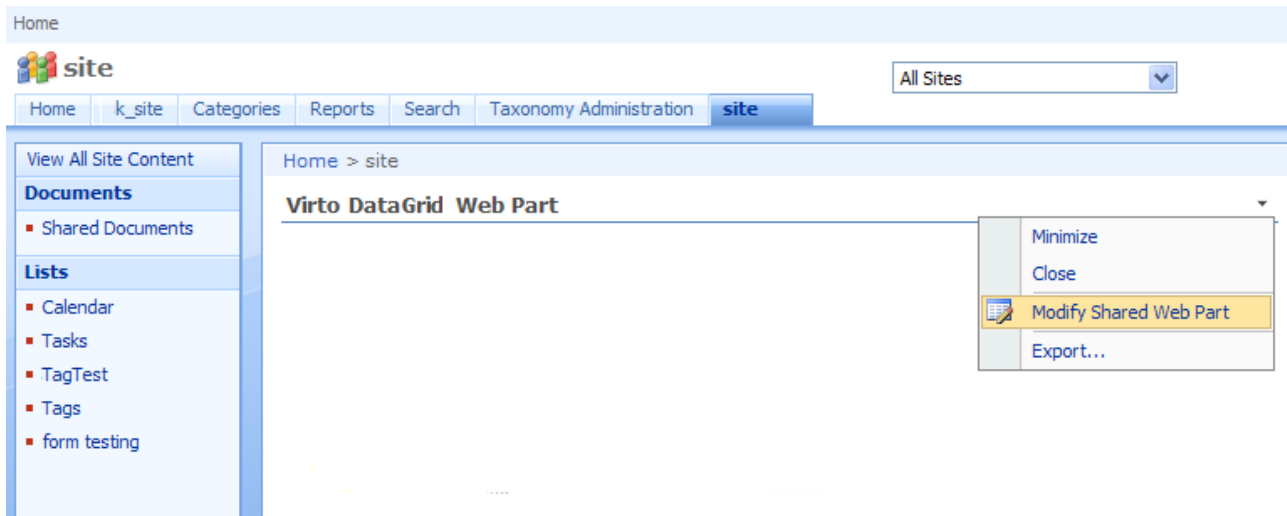
Virto DataGrid Web Part allows users to display items of a SharePoint list or SQL table. Applying filters to displayed items can help to sort information and view only required data. Moreover users can relate two SharePoint lists of two SQL tables and display required data from both of them.

This section includes detailed instructions of how to use DataGrid Web Part and display items from SharePoint lists and SQL tables.

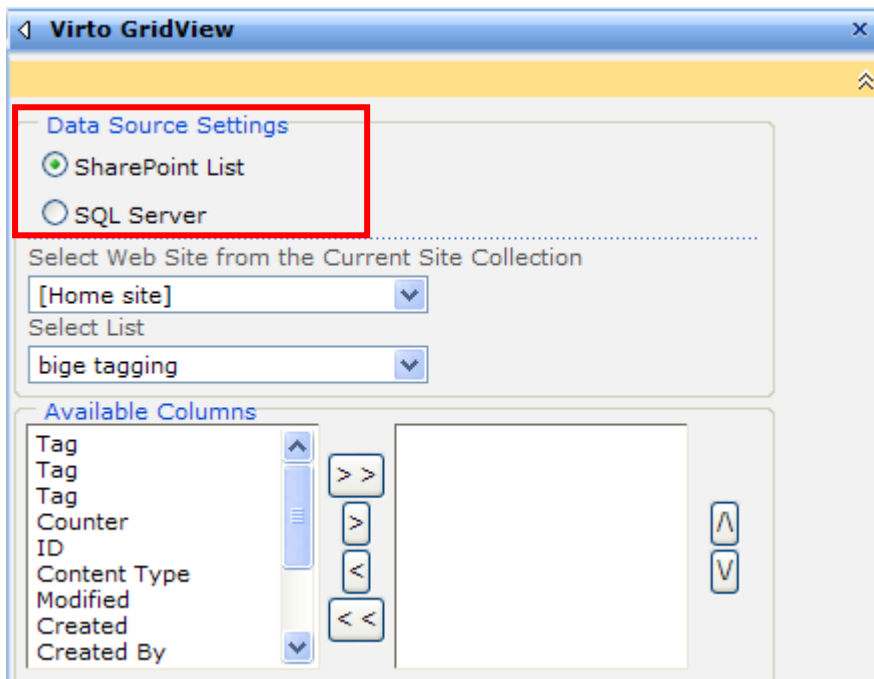
Go to the SharePoint site where the Virto DataGrid Web Part is installed. Use “Modify Shared Web Part” to open the block of web part settings and adjust web part.

### Using SharePoint List for DataGrid

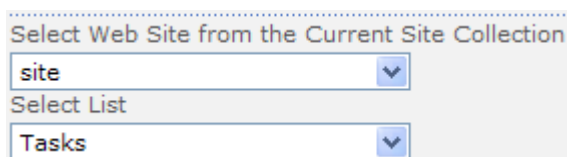
Click “Modify Shared Web Part”.



Select SharePoint list as a data source.



Then select a site or a site collection which the list belongs to and a list you want to use for DataGrid.



Now you need to define which columns will be displayed in your DataGrid. Use buttons on the right to change the order of columns in DataGrid table.

Select Web Site from the Current Site Collection  
 ak\_site

Select List  
 Tasks

Available Columns

Priority	>>	Title
Task Group	>	Status
Description	<	% Complete
Start Date	<<	
Due Date		
Tags		
ID		
Content Type		
Modified		

▲  
▼

**Note:** only users with list edit rights can adjust the web part.

Click "OK" to finish adjustment or click "Apply" to save the settings and continue.

Virto GridView

Data Source Settings

SharePoint List  
 SQL Server

Select Web Site from the Current Site Collection  
 site

Select List  
 Tasks

Available Columns

Priority	>>	Title
Task Group	>	Status
Description	<	% Complete
Start Date	<<	
Due Date		
Tags		
ID		
Content Type		
Modified		

▲  
▼

+ Nested Data Settings

+ Appearance


+ Layout

+ Advanced

OK Cancel Apply

As a result items from selected SharePoint list will be displayed in the DataGrid Web Part and available for users with view/edit rights.

Home > site > Shared Documents > GridView

 **GridView**

**Virto GridView**


Title	Status	PercentComplete	Priority
Prepare Documentation	Not Started	0.3	(2) Normal
Submit Application	Not Started	0.04	(1) High
Check Application	Not Started		(3) Low
Release	Not Started	0.25	(2) Normal
Announcement	Not Started	1	(2) Normal
Release 1.5	Not Started	0.15	(2) Normal
Testing	Not Started		(2) Normal
Check Links	Not Started	0.82	(2) Normal

Page 1 of 2 10 View 1 - 10 of 15

## Using SQL Table for DataGrid

Click “Modify Shared Web Part”.

Home

 **site** All Sites

Home k\_site Categories Reports Search Taxonomy Administration **site**

View All Site Content

**Documents**

- Shared Documents

**Lists**

- Calendar
- Tasks
- TagTest
- Tags
- form testing

Home > site

**Virto DataGrid Web Part**

Minimize  
Close  
Modify Shared Web Part  
Export...

Select SQL server as a data source.

**Virto GridView**

**Data Source Settings**

SharePoint List

SQL Server

Server Name  
server\\sqlexpress

User Name  
[Empty]

Password  
[Empty]

Windows Authentication

Connect

Database Name  
cs\_virto

Sql Table  
cs\_Posts

Available Columns

PostID  
ThreadID  
ParentID  
PostAuthor  
UserID  
SectionID  
PostLevel  
SortOrder  
Subject

OK Cancel Apply

Enter SQL server name, user name and password. Then click “Connect” to connect to SQL server.

**Data Source Settings**

SharePoint List

SQL Server

Server Name  
server\\sqlexpress

User Name  
admin

Password  
●●●●●●●

Windows Authentication

Connect

Enter data base name on selected SQL server and choose and SQL table to display items in your DataGrid.

Database Name

Sql Table

Now you need to define which columns will be displayed in your DataGrid. Use buttons on the right to change the order of columns in DataGrid table.

Available Columns

Priority  
 Task Group  
 Description  
 Start Date  
 Due Date  
 Tags  
 ID  
 Content Type  
 Modified

>>  
 >  
 <  
 <<

Title  
 Status  
 % Complete

▲  
 ▼

OK Cancel Apply

Click "OK" to finish adjustment or click "Apply" to save the settings and continue.

Available Columns

Priority  
 Task Group  
 Description  
 Start Date  
 Due Date  
 Tags  
 ID  
 Content Type  
 Modified

>>  
 >  
 <  
 <<

Title  
 Status  
 % Complete

▲  
 ▼

OK Cancel Apply

As a result items from selected SQL table will be displayed in the DataGrid Web Part.

Home > site > Shared Documents > GridView

GridView

Virto GridView

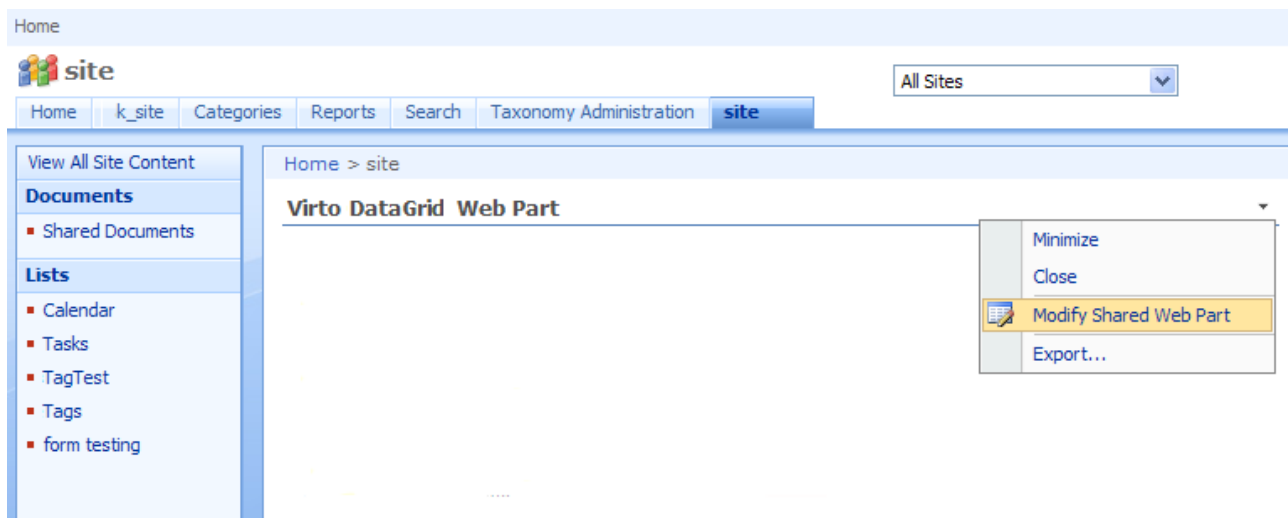
Title	Status	PercentComplete	Priority
Prepare Documentation	Not Started	0.3	(2) Normal
Submit Application	Not Started	0.04	(1) High
Check Application	Not Started		(3) Low
Release	Not Started	0.25	(2) Normal
Announcement	Not Started	1	(2) Normal
Release 1.5	Not Started	0.15	(2) Normal
Testing	Not Started		(2) Normal
Check Links	Not Started	0.82	(2) Normal

Page 1 of 2 10 View 1 - 10 of 15

## Nested Data Grids

Virto DataGrid Web Part allows users to relate two SharePoint lists or two SQL tables selected as data source and create **nested Data Grids**. This can be applied when you need to display information from both sources. It is required to select a field in each of lists (SQL tables). These fields should be of the same type (for example, text or URL). If selected fields have different types, the system will leave these fields empty.

Use “Modify Shared Web Part”.



Move to “Nested Data Settings” block. Select *child* SharePoint list or *child* SQL table (see **Using SharePoint List for DataGrid** and **Using SQL Table for DataGrid** sections).

**Nested Data Settings**

**Nested Data Settings**

Show Nested Data

Child List

Events

Child Field

Status

Parent Field

Status

Content Type ID  
Approver Comments  
File Type  
Status  
ID  
Content Type  
Modified  
Created  
Created By

Title  
Priority

>>  
>  
<  
<<

^  
v

Now define parent field and child field to display in DataGrid. If values of these fields are the same, child data grid will display corresponding items.

**Nested Data Settings**

**Nested Data Settings**

Show Nested Data

Child List

Events

Child Field

Status

Parent Field

Status

Content Type ID  
Approver Comments  
File Type  
Status  
ID  
Content Type  
Modified  
Created  
Created By

Title  
Priority

>>  
>  
<  
<<

^  
v

Select columns from child list to display in the data grid and define their order.



**Nested Data Settings**

Show Nested Data

Child List  
 Events

Child Field  
 Status

Parent Field  
 Status

Content Type ID  
 Approver Comments  
 File Type  
 Status  
 ID  
 Content Type  
 Modified  
 Created  
 Created By

Title  
 Priority

Click "OK" to finish adjustment or click "Apply" to save the settings and continue.

**Nested Data Settings**

Show Nested Data

Child List  
 Events\_11

Child Field  
 Status

Parent Field  
 Status

Content Type ID  
 Approver Comments  
 File Type  
 Status  
 ID  
 Content Type  
 Modified  
 Created  
 Created By

Title  
 Priority

**Appearance**

**Layout**

**Advanced**

OK Cancel Apply

Now you can view events from parent and child lists (SQL tables) in a single Data Grid. Click "+" opposite an item and you will see related data from child data grid. Just click opposite a required time.

Home > site > Shared Documents > mypage

Home > site > Shared Documents > mypage

mypage

**Virtto GridView**

	Title	Status	PercentComplete									
-	Report for April	Draft	0.5									
<table border="1"> <thead> <tr> <th></th> <th>Title</th> <th>Priority</th> </tr> </thead> <tbody> <tr> <td>+</td> <td>Meeting with Clients</td> <td>(2) Normal</td> </tr> <tr> <td></td> <td>Overview Meeting</td> <td>(2) Normal</td> </tr> </tbody> </table>					Title	Priority	+	Meeting with Clients	(2) Normal		Overview Meeting	(2) Normal
	Title	Priority										
+	Meeting with Clients	(2) Normal										
	Overview Meeting	(2) Normal										
+	New list of projects	Final	1									
+	Presentation for RuMeg	Draft	0.3									
+	Technical Requirement	Draft	0.5									
+	Report for October	Not Started	0									
+	New Working Scheme	Draft	0.6									
+	List of Participants	Final	1									
+	Ent Review	Draft	0.8									

Page 1 of 1 10 View 1 - 8 of 8

## Applying Filters to DataGrid

You can use different filters to display in DataGrid only required information.

**Note:** filters settings can be applied only for SharePoint lists. It is impossible to filter information from SQL server.

If you try to define filter for SQL data source, you will see the notification as follows:

**Filters Settings**

Sql Data Source is not supported

Click “Modify Shared Web Part” and move to “Filters Settings” block.

**Virto DataGrid Web Part ...**

Data Source Settings

SharePoint List  
 SQL Server

Select Web Site from the Current Site Collection  
 [Home site] ▾

Select List  
 dvlist ▾

Available Columns


Title  
 2009  
 2010  
 ID  
 Content Type  
 Modified  
 Created  
 Created By  
 Modified By

+ Nested Data Settings

- Filters Settings

And

+

To define the conditions for displayed items click . Now use special operators and values to define the filter.

- Filters Settings

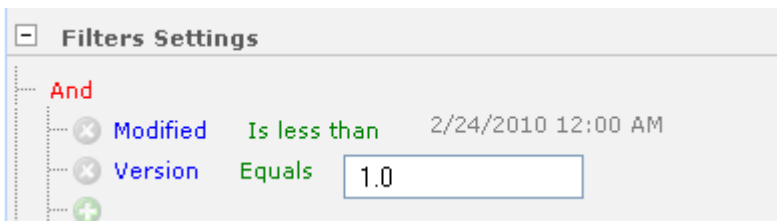
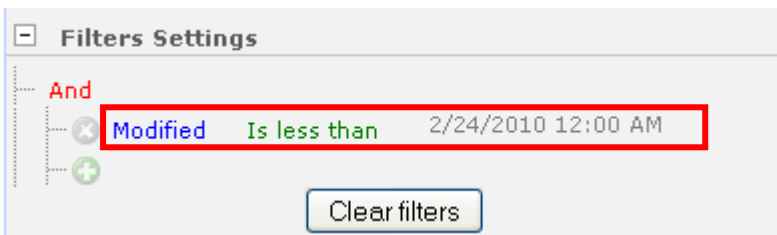
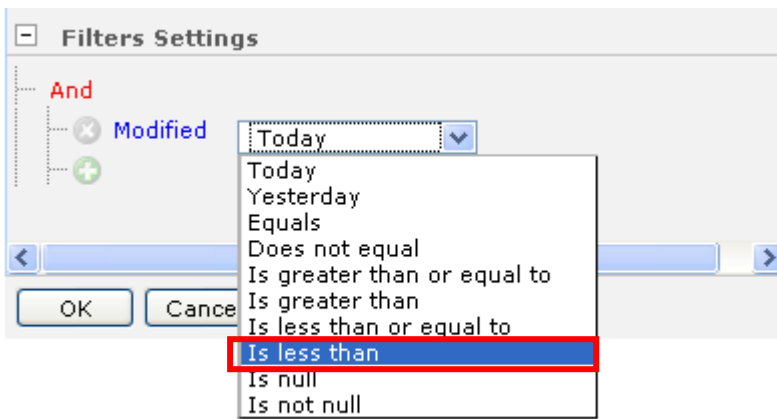
And

Choose ▾

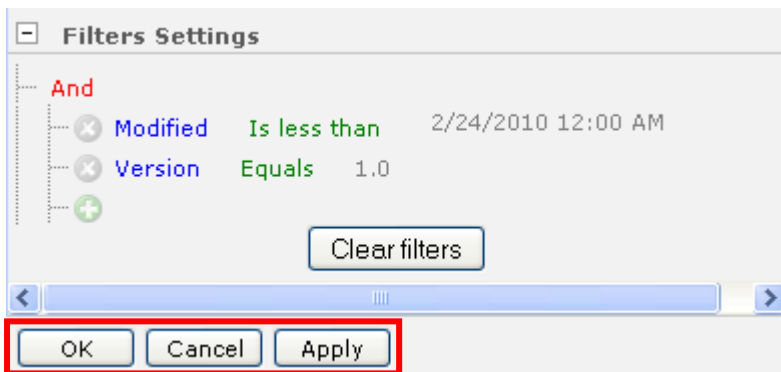
Choose  
 And  
 Or  
 2009  
 2010  
 Content Type  
 Created  
 Created By  
 ID  
 Modified  
 Modified By  
 Title  
 Version

+ App  
 + Lay  
 + Adv

<



Click "OK" to finish adjustment or click "Apply" to save the settings and continue.



Now if an item satisfies defined filter, it will be displayed in the DataGrid.

Team Site

Welcome

Team Site

Home

Site Actions

Team Site > Library > grid

grid

Virtio DataGrid Web Part for Microsoft SharePoint 1.0

Title	2009	2010	ID	Content Type	Modified	Created	Version
Test record 1	0	1	1	Item	2/12/2010 11:05:42 AM	2/10/2010 11:36:51 AM	1.0
Test record 2	0	1	2	Item	2/12/2010 11:06:01 AM	2/10/2010 11:36:54 AM	1.0
One more test	10	20	3	Item	2/12/2010 11:06:09 AM	2/10/2010 11:37:01 AM	1.0
And even	15	10	4	Item	2/10/2010 11:37:16 AM	2/10/2010 11:37:16 AM	1.0

Page 1 of 1

## Default Page Size

You can set default page size for the data grid (amount of displayed items). Go to Data Grid settings and select required page size from the drop down. Click "OK" or "Apply" to save the settings.

**Virtio GridView**

Data Source Settings

SharePoint List  
 SQL Server

Select Web Site from the Current Site Collection

ak\_site

Select List

Tasks

Available Columns

Due Date  
Status  
Task Group  
Description  
ID  
Content Type  
Modified  
Created  
Created By

Title  
Start Date  
Priority  
% Complete

Page size:  
10  
25  
50

ASC

Nested Data Settings

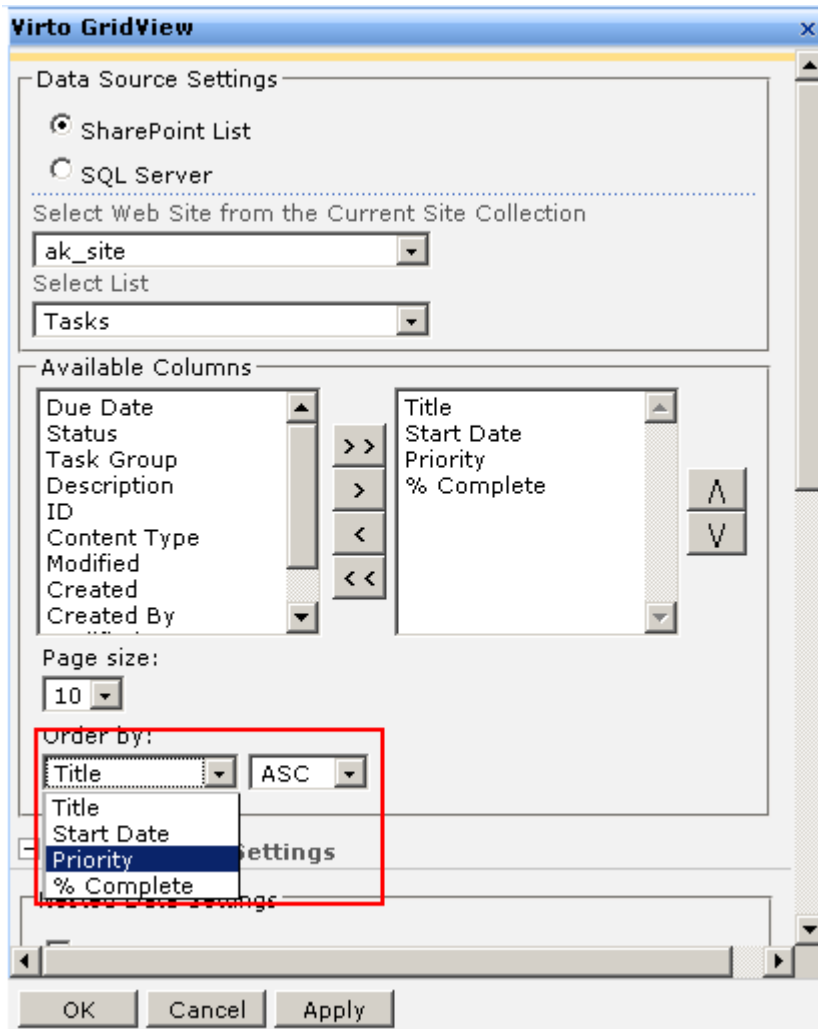
Filters Settings

OK Cancel Apply

## Default Order Parameters

You can set default order parameters for Data Grid.

Go to Data Grid settings and select required sorting field and order (ascending or descending) from the dropdown. Click “OK” or “Apply” to save the settings.



## Actions with DataGrid

When Virto DataGrid Web Part is adjusted and required data is displayed, you can change the width of displayed columns or define sorting order.

Drag and drop column's border to change its width.

Home Welcome ▾ | My Site

**site** Advanced Search

Home site Categories Reports Search Taxonomy Administration **site** Site Actions ▾

Home > site > Shared Documents > mypage

**mypage**

**Virto GridView**

Title	Status	PercentComplete						
- Report for April	Draft	0.5						
<table border="1"> <thead> <tr> <th>Title</th> <th>Priority</th> </tr> </thead> <tbody> <tr> <td>Meeting with Clients</td> <td>(2) Normal</td> </tr> <tr> <td>Overview Meeting</td> <td>(2) Normal</td> </tr> </tbody> </table>	Title	Priority	Meeting with Clients	(2) Normal	Overview Meeting	(2) Normal		
Title	Priority							
Meeting with Clients	(2) Normal							
Overview Meeting	(2) Normal							
+ New list of projects	Final	1						
+ Presentation for RuMeg	Draft	0.3						
+ Technical Requirement	Draft	0.5						
+ Report for October	Not Started	0						
+ New Working Scheme	Draft	0.6						
+ List of Participants	Final	1						
+ Ent Review	Draft	0.8						

Page 1 of 1 10 ▾ View 1 - 8 of 8

Home Welcome ▾ | My Site

**site** Advanced Search

Home site Categories Reports Search Taxonomy Administration **site** Site Actions ▾

Home > site > Shared Documents > mypage

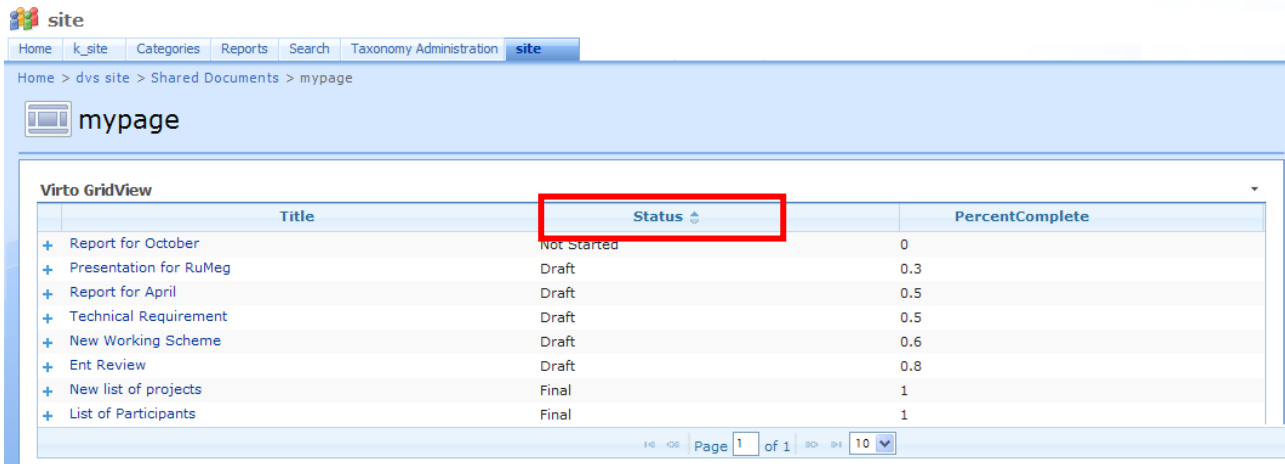
**mypage**

**Virto GridView**

Title	Status	PercentComplete						
- Report for April	Draft	0.5						
<table border="1"> <thead> <tr> <th>Title</th> <th>Priority</th> </tr> </thead> <tbody> <tr> <td>Meeting with Clients</td> <td>(2) Normal</td> </tr> <tr> <td>Overview Meeting</td> <td>(2) Normal</td> </tr> </tbody> </table>	Title	Priority	Meeting with Clients	(2) Normal	Overview Meeting	(2) Normal		
Title	Priority							
Meeting with Clients	(2) Normal							
Overview Meeting	(2) Normal							
+ New list of projects	Final	1						
+ Presentation for RuMeg	Draft	0.3						
+ Technical Requirement	Draft	0.5						
+ Report for October	Not Started	0						
+ New Working Scheme	Draft	0.6						
+ List of Participants	Final	1						
+ Ent Review	Draft	0.8						

Page 1 of 1 10 ▾ View 1 - 8 of 8

To change the sorting order of displayed items, just click the required parameter. For example, to sort items by status click "Status".



The screenshot shows a web application interface with a navigation menu at the top. The main content area displays a table titled "Virto GridView" with three columns: "Title", "Status", and "PercentComplete". The "Status" column is highlighted with a red box. The table contains seven rows of data, each with a plus sign in the first column. The status values are "Not Started", "Draft", "Draft", "Draft", "Draft", "Final", and "Final". The "PercentComplete" values are 0, 0.3, 0.5, 0.5, 0.6, 0.8, and 1. The page number "Page 1 of 1" and a dropdown menu with "10" are visible at the bottom of the table.

	Title	Status	PercentComplete
+	Report for October	Not Started	0
+	Presentation for RuMeg	Draft	0.3
+	Report for April	Draft	0.5
+	Technical Requirement	Draft	0.5
+	New Working Scheme	Draft	0.6
+	Ent Review	Draft	0.8
+	New list of projects	Final	1
+	List of Participants	Final	1

The items will be arranged according to corresponding values of "Status" fields.



## Version Release History

Release Date	Version	Description
05/11/2010	v. 1.2.0	<ul style="list-style-type: none"> <li>[+] Saving page size</li> <li>[+] Saving sorting</li> <li>[+] Saving columns' width</li> <li>[+] Ability to set default page size</li> <li>[+] Ability to set default order parameters</li> </ul>
02/19/2010	v. 1.1.0	<ul style="list-style-type: none"> <li>[+] Filters for SharePoint list data are added</li> </ul>
11/12/2009	v. 1.0.0	<p>First Public Release</p> <ul style="list-style-type: none"> <li>[+] DataSource SharePoint List user interface is added</li> <li>[+] DataSource SQL Server user interface is added</li> <li>[+] Standard edit form in window pop-up for SharePoibt List DataSource is added.</li> <li>[+] Nested Data settings are added</li> <li>[+] Paging and selecting items number from dropdown.</li> </ul>