



Virto List Form Designer Web Part for Microsoft SharePoint



Installation and User Guide

Release Version 1.3.25

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Virto List Form Designer 1.0 for Microsoft SharePoint

Key Features

1. Creating list forms for SharePoint lists
2. Designing new item form view with “Up”, “Down”, “Left” “Right” buttons.
3. Grouping fields into sections.
4. Structure templates for forms, fields and sections view.
5. Using forms on any SharePoint site page.

System Requirements

Operating System

Microsoft Windows Server 2003 and 2008

Server

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 List Form Designer.

Expected Outage

The expected outage time is from 2 minutes to several hours depending on your hardware and number of SharePoint sites. Though we recommend all Virto users to upgrade on a weekend.

Installing Virto List Form Designer

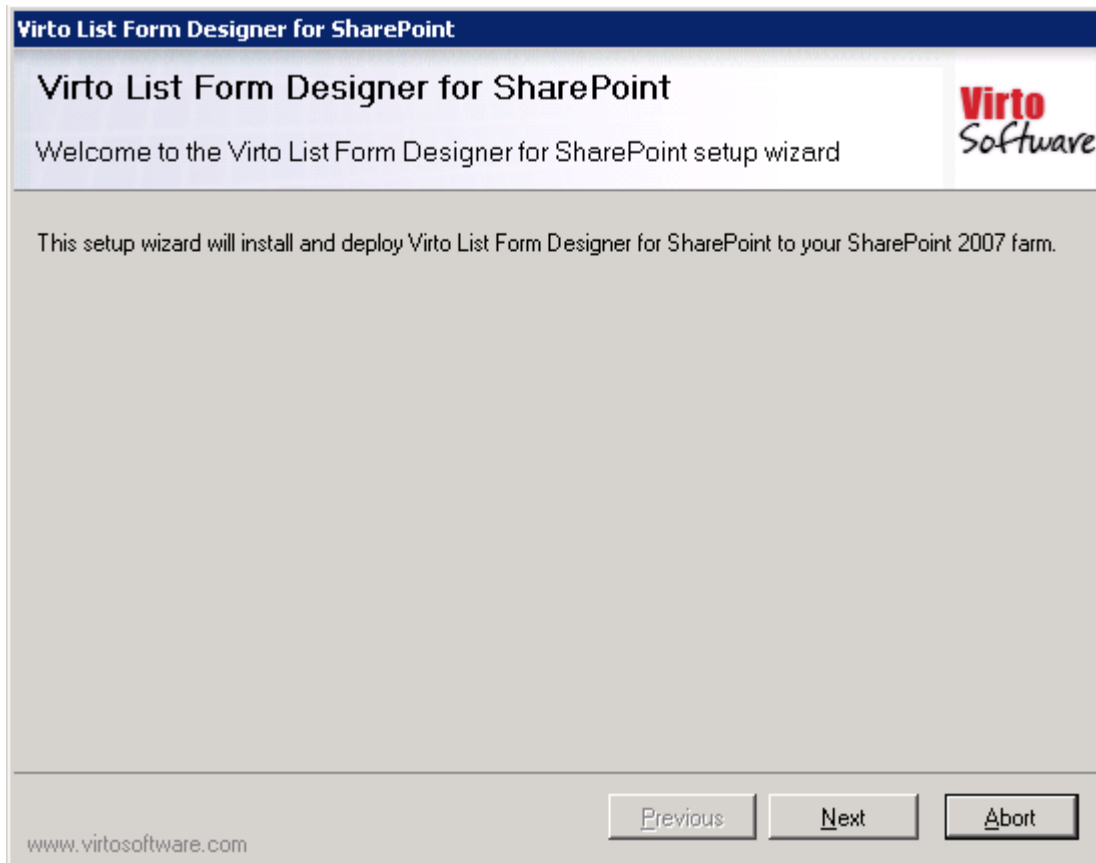
Before you begin, you need to make sure you have access to the server and your account has the appropriate administrative privileges to install applications.

Virto List Form Designer setup program provides links to the various installation components for Virto

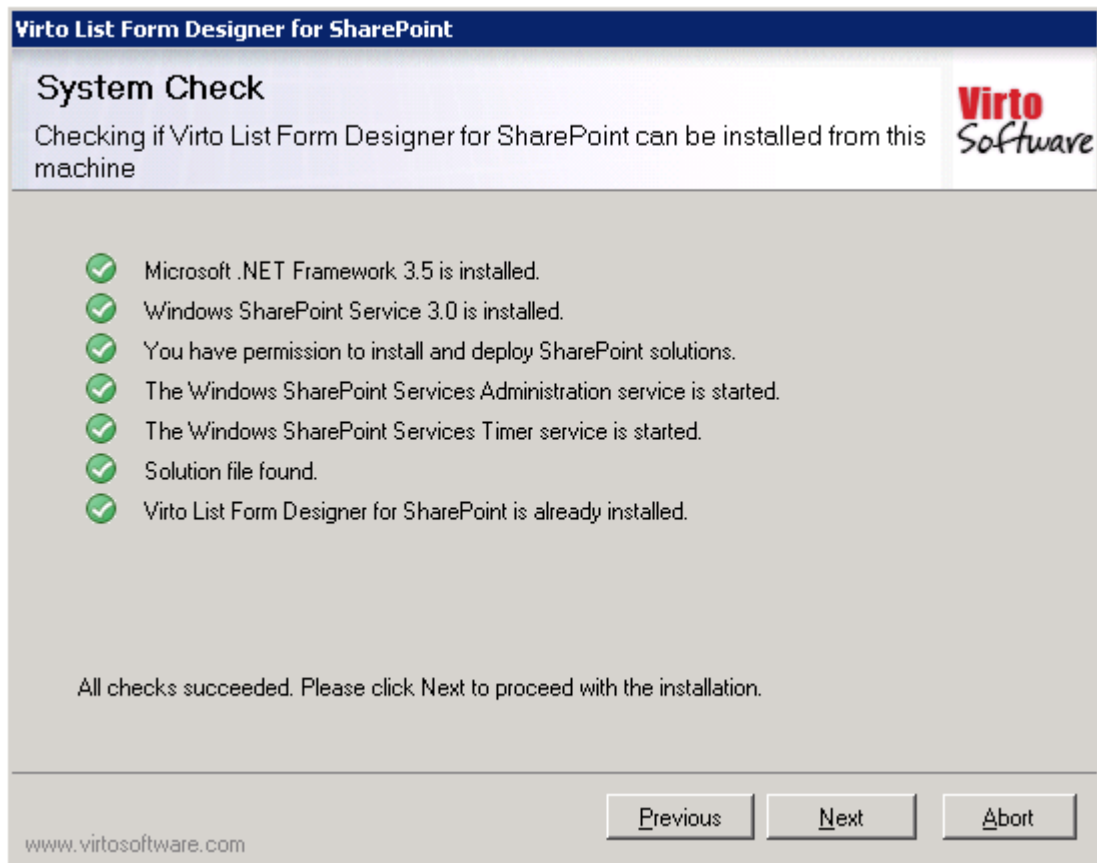
List Form Designer.

To access Virto List Form Designer Setup program download **Virto.SharePoint.ListFormDesigner.X.X.zip** file and unzip it. Open folder and run extracted Setup.exe file.

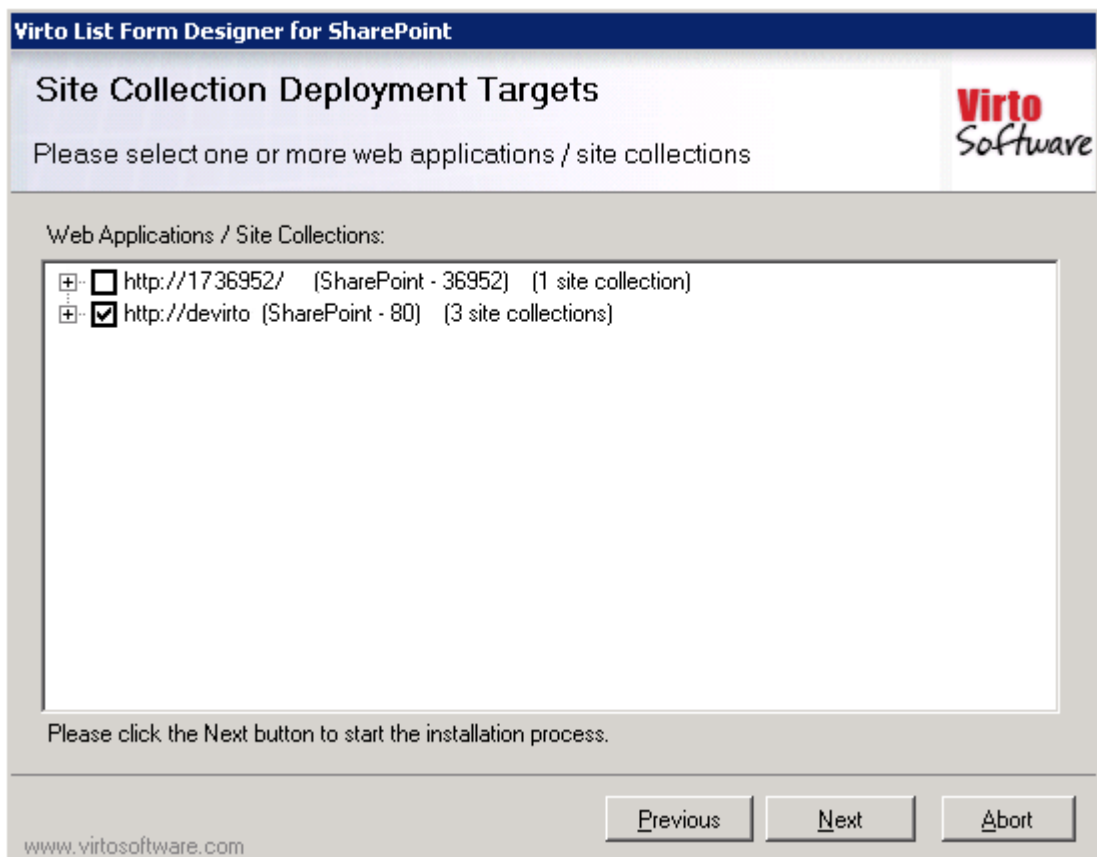
The setup wizard window will appear.



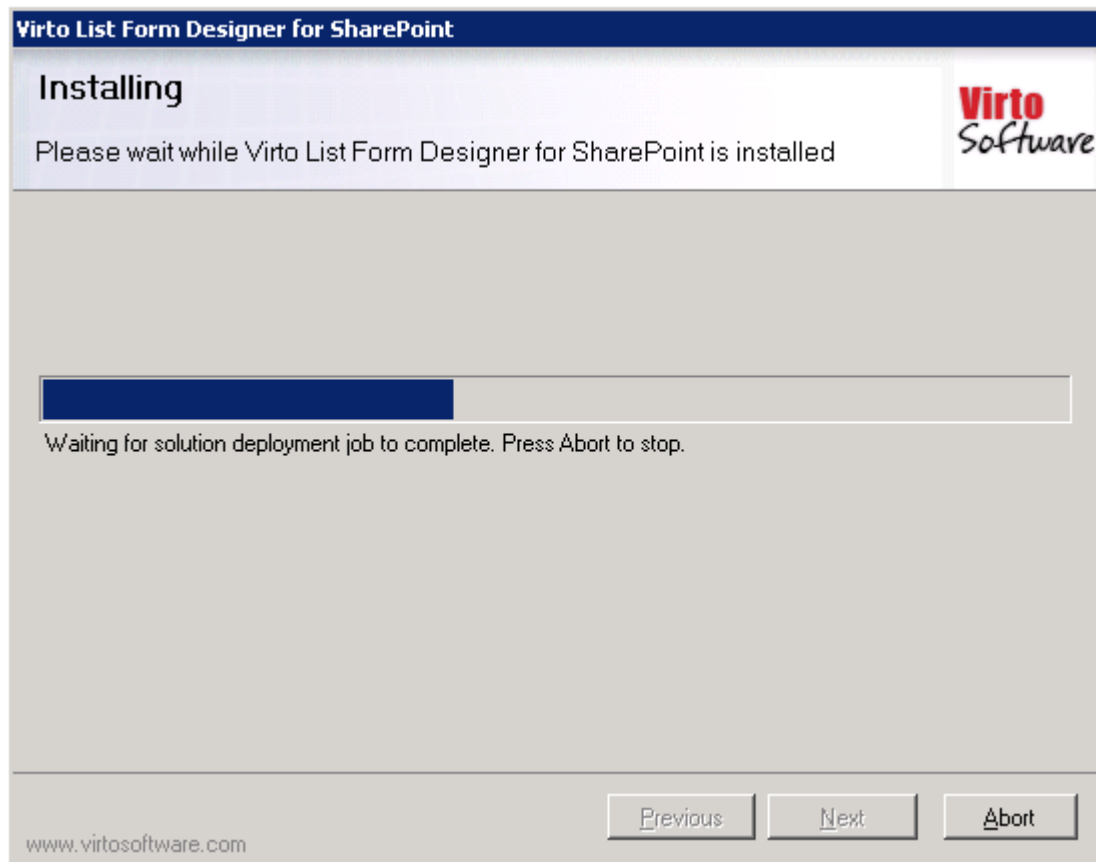
Virto List Form Designer setup wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click "Next".



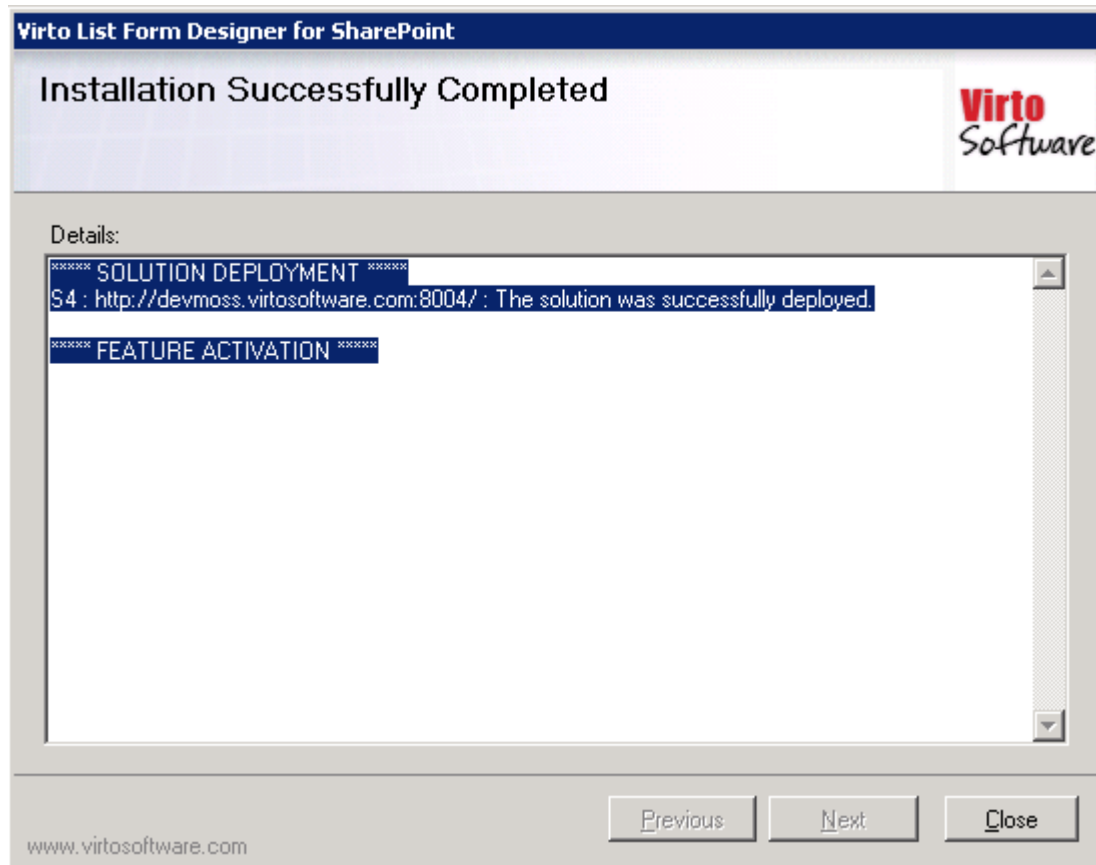
Select the web application(s) where you want to install the product.



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". The installation is completed.

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 List Form Designer

If you already use Virto List Form Designer 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 List Form Designer* section.

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

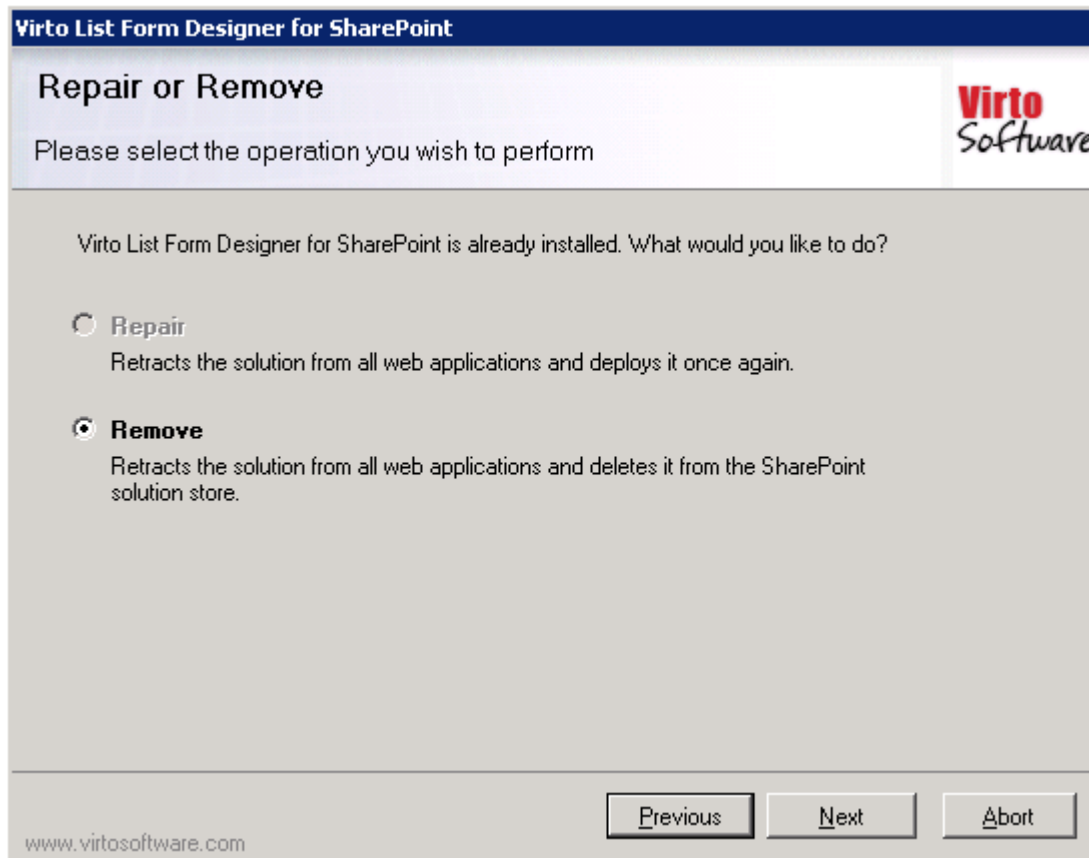
On the step check the box "Upgrade" and click "Next".

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

Uninstalling Virto List Form Designer

To uninstall the Web Part:

1. Double click the Setup.exe extracted from downloaded **Virto.SharePoint.ListFormDesigner.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 Form Designer, all the settings applied to SharePoint lists with the component will be removed.

Virto List Form Designer Administration and Usage

Before you start working with Virto List Form Designer, do the following actions in **Sharepoint web.config** file:

Enable session state in "pages" node

```
<pages enableSessionState="true" enableViewState="true" enableViewStateMac="true"
validateRequest="false"
pageParserFilterType="Microsoft.SharePoint.ApplicationRuntime.SPPageParserFilter,
Microsoft.SharePoint, Version=12.0.0.0, Culture=neutral, PublicKeyToken=71e9bce111e9429c"
asyncTimeout="7">
```

uncomment the following line in "httpModules" section

```
<add name="Session" type="System.Web.SessionState.SessionStateModule" />
```

Virto List Form Designer for SharePoint allows users to create list forms with required set of fields and then use them on SharePoint site.

List Forms Design

Adding New Form

Go to a required list and use "Settings – List Settings" menu.

The screenshot shows a SharePoint site interface. The top navigation bar includes 'Home', 'site', 'Categories', 'Reports', 'Search', and 'Taxonomy Administration'. The main content area displays a list titled 'VList'. The list has columns for 'Title', 'VStart', and 'Content Type'. The 'Settings' dropdown menu is open, showing options: 'Create Column', 'Create View', and 'List Settings'. The 'List Settings' option is highlighted with a red box. The list items are as follows:

Title	VStart	Content Type
Welcome to VList!	4/17/2010 5:38 PM	Item
weekends party	4/25/2010 5:40 PM	Item
Vlist test	5/14/2010 11:45 PM	Item
Abocarso, Mellaton	5/18/2010 11:50 PM	Item
test1111	4/16/2010 11:16 AM	Item

Note: by default only SharePoint site administrator can manage forms though he can allow groups/users to manage forms by themselves.

Then use “Virto SharePoint List Form Designer” link.

Home > site > VList > Settings

Customize VList

List Information
 Name: VList
 Description:

General Settings	Permissions and Management	Communications
<ul style="list-style-type: none"> ▣ Title, description and navigation ▣ Versioning settings ▣ Advanced settings ▣ Audience targeting settings ▣ SharePoint list forms extensions ▣ Virto SharePoint List Form Extender ▣ Virto SharePoint List Form Designer 	<ul style="list-style-type: none"> ▣ Delete this list ▣ Save list as template ▣ Permissions for this list ▣ Workflow settings ▣ Information management policy settings 	<ul style="list-style-type: none"> ▣ RSS settings

On “Virto Form Designer Settings” page use “Click here to add new form”.

Home > site > List settings > Virto Form Designer Settings

Virto Form Designer Settings

Available forms for the selected list.
 You can add, delete, and edit list forms in this section.

Form Name

▣ [Click here to add new form](#)

A new window will open. Type form name in it, select corresponding list, define view type and enter cell padding. Click “Save” when all required fields are filled out.

SharePoint.ListFormDesigner/FormDo

List Name: VList

Form Type: New Item Form

Form Name: Vlist form 1

ViewType:

- Two Cols 1:1
- Two Cols 1:2
- Two Cols 2:1
- Three Cols

CellPadding: 0

Save Cancel

Done Internet 100%

New form will appear in the list of forms for this list.

site

Home site Categories Reports Search Site Actions

List settings > Virto Form Designer Settings

Virto Form Designer Settings

Available forms for the selected list.

You can add, delete, and edit list forms in this section.

Form Name
Vlist form 1

Click here to add new form

New Form Design

Click "Design form" button opposite required list form.

site

Home site Categories Reports Search Taxonomy Administration Site Actions

List settings > Virto Form Designer Settings

Virto Form Designer Settings

Available forms for the selected list.

You can add, delete, and edit list forms in this section.

Form Name
Vlist form 1

Click here to add new form

In the open window you can adjust the view of list form (new form in our case). To move a field click it (it will be green-highlighted). And use “Up”, “Down”, “Right”, “Left” buttons on the right to move field to another place.

For example use “Down” button twice for “Title” field and the form will look as follows:

FormName: Vlist form 1

<VList>

VStart [calendar] 12 AM 00

VEnd [calendar] 12 AM 00

Title *

Manage fields and sections

↑

← →

↓

Edit Form

Add Section

Adding Sections

You can add any amount of sections and add more fields from the current list to them. Click “Add section” on the right.

FormName: Vlist form 1

<VList>

Title *

Manage fields and sections

↑

← →

↓

Edit Form

Add Section

Fill out fields in the open window: enter section title and select view type.

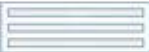
Add Section

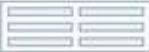
Title:


Show Section Border

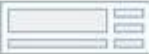
Show Section Title

View Type:

One Col 

Two Cols 1:1 

Two Cols 1:2 

Two Cols 2:1 

Cell Padding:

New section will appear on the form.


FormName: vlist form 1

<VList>

Title *

<Start date and End Date>

Manage fields and sections



- Edit Form
- Add Section

Adding Fields

Use "Add field" button to add fields to new section.


FormName: Vlist form 1

<VList>

Title *

<Start date and End Date>

Manage fields and sections



- Edit Form
- Add Section

Selected Elements:

- Edit Section
- Add Field
- Edit Field
- Remove Section
- Remove Field

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.

Select field from the list and define view.

Add New Field

Field:

VStart
Title
VStart
VEnd

Label Width: 120 px

TabIndex: 0

ViewType:

Col Span 1

Col Span 2

Rows: 1

Save Cancel

Click "Save&Close" to save settings and finish adjustment.

FormName: Vlist form 1

<VList>

Title *

<Start Date and End Date>

VStart 12 AM 00 VEnd 12 AM 00

Manage fields and sections

Edit Form
 Add Section

Selected Elements:

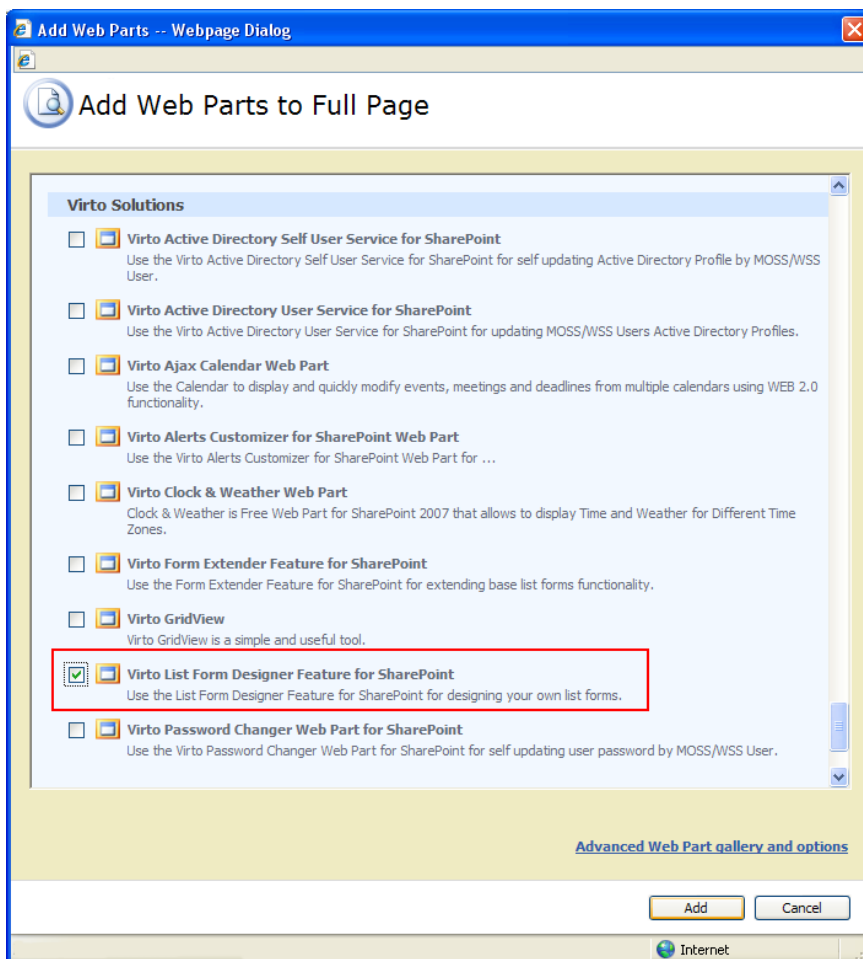
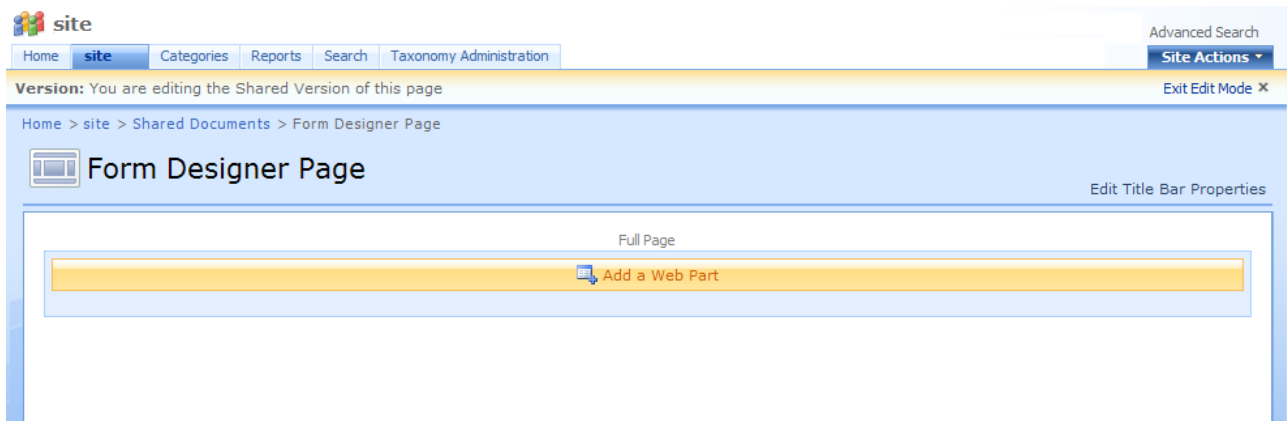
Edit Section
 Add Field
 Edit Field
 Remove Section
 Remove Field

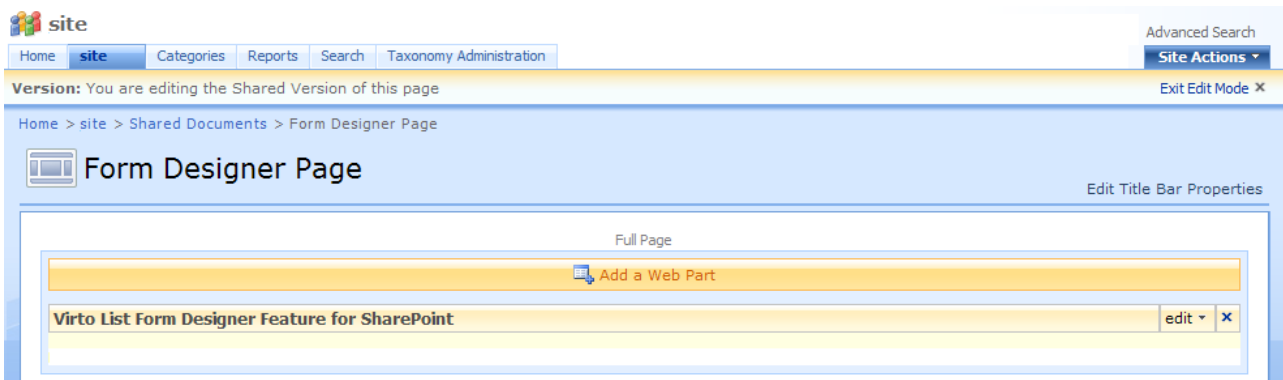
Save
 Save & Close
 Recreate Form

Adding Form to a SharePoint Site

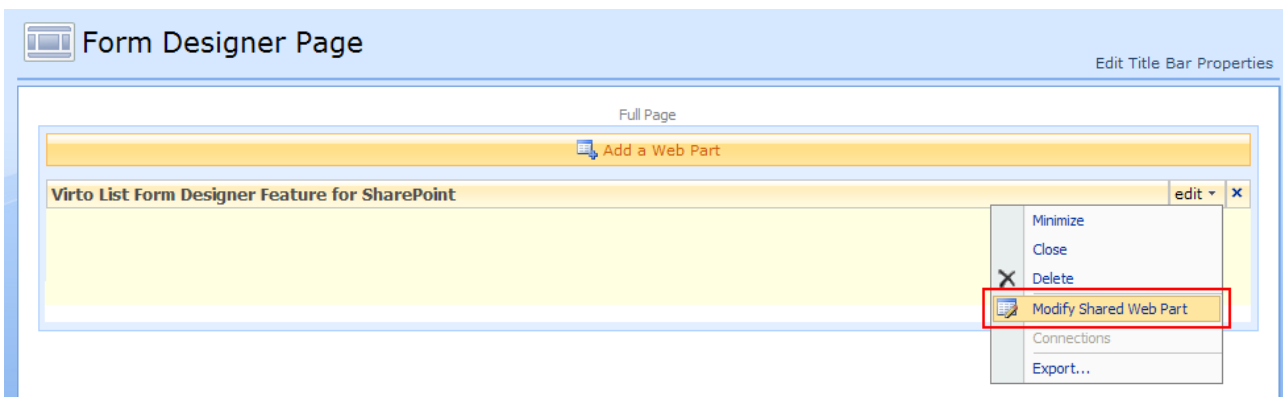
When you have adjusted a list form, you can add it to a SharePoint site. This form can be used by SharePoint site users according to the rights provided by site administrator.

Go to your SharePoint site and add new page where you want to publish your list form. Use “Add a Web Part” and select Virto List Form Designer from the list. Click “Add”.

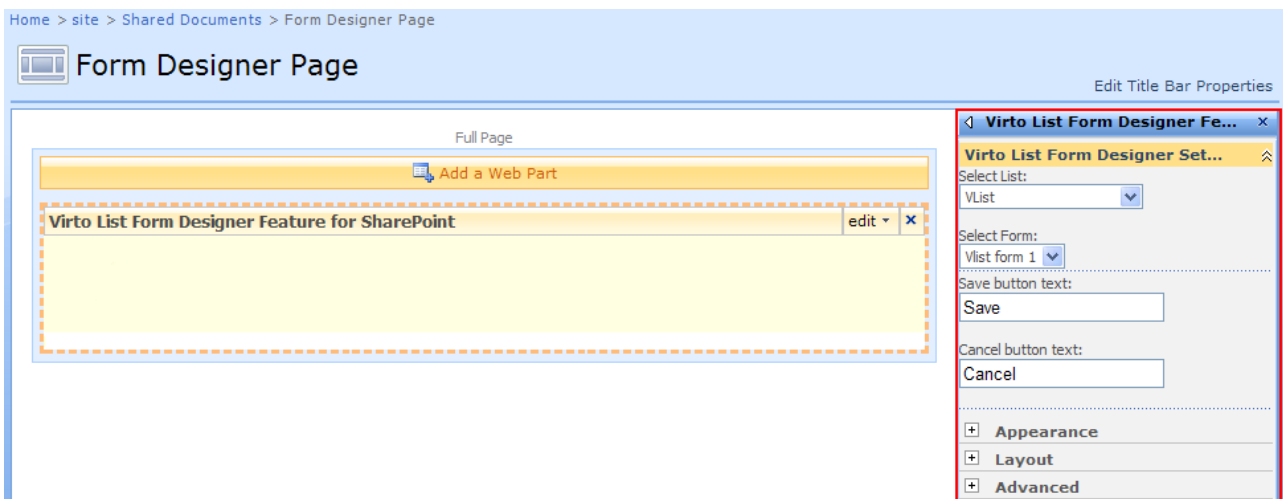




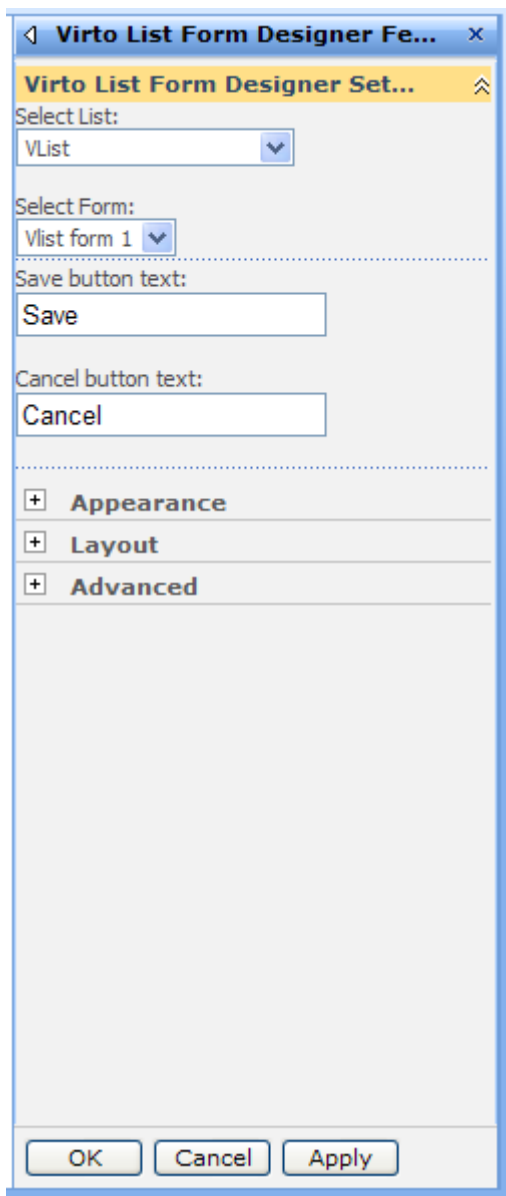
Click “Edit – Modify Shared web part”.



Now select list from your SharePoint site, select list form and define text for “Save” and “Cancel” buttons.



Click “OK” to save the settings and return to the page.



The image shows a dialog box titled "Virto List Form Designer Fe..." with a close button (X) in the top right corner. The dialog is divided into several sections:

- Virto List Form Designer Set...** (Section header)
- Select List:** A dropdown menu showing "VList".
- Select Form:** A dropdown menu showing "Vlist form 1".
- Save button text:** A text input field containing "Save".
- Cancel button text:** A text input field containing "Cancel".
- Appearance:** A section header with a plus sign (+).
- Layout:** A section header with a plus sign (+).
- Advanced:** A section header with a plus sign (+).

At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Apply".

Working with List Forms on SharePoint Site Page

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

site

Home site Categories Reports Search Advanced Search Site Actions

Home > site > Shared Documents > Form Designer Page

Form Designer Page

Virtolist Form Designer Feature for SharePoint

VList

Title * Task for project

Start Date and End Date

VStart [Calendar] 12 AM 00 VEnd [Calendar] 12 AM 00

Save Cancel

April, 2010

S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1

Today is Monday, April 19, 2010

When a new item is added, user will see the message as follows:

Virtolist Form Designer Feature for SharePoint
Item has been successfully created.

The note will appear in the corresponding SharePoint list.

site

Home site Categories Reports Search Taxonomy Administration

Home > site > VList

VList

New Actions Settings

ID	Title	VStart	VEnd	Created	Title	Title	Content Type
	Welcome to VList!	4/17/2009 5:00 PM	4/17/2009 6:00 PM	4/23/2009 5:38 PM	Welcome to VList!	Welcome to VList!	Item
	weekends party	4/25/2009 12:00 AM	4/27/2009 12:00 AM	4/23/2009 5:40 PM	weekends party	weekends party	Item
	Vlist test	5/14/2009 12:00 AM	5/16/2009 12:00 AM	5/4/2009 12:45 PM	Vlist test	Vlist test	Item
	Abocarso, Mellaton	5/18/2009 12:00 AM	5/19/2009 12:00 AM	5/4/2009 1:50 PM	Abocarso, Mellaton	Abocarso, Mellaton	Item
	Task for project NEW	4/19/2010 12:00 AM	4/20/2010 12:00 AM	4/19/2010 3:32 PM	Task for project	Task for project NEW	Item

View All Site Content

Documents

- Shared Documents
- Workbooks
- myWorkbooksDCL

Lists

- Calendar
- VList
- Calendar2
- test
- test 34
- test calendar

This way you can organize adding information to SharePoint lists with a special form designed with Virtolist Form designer.

Version Release History

Release Date	Version	Description
19/11/2020	v. 1.3.25	[-] Ribbon action on subsites has been fixed
2010-2020	v.1.01-1.3.25	Bug fixing
14/19/2010	v. 1.0.0	First public release