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.
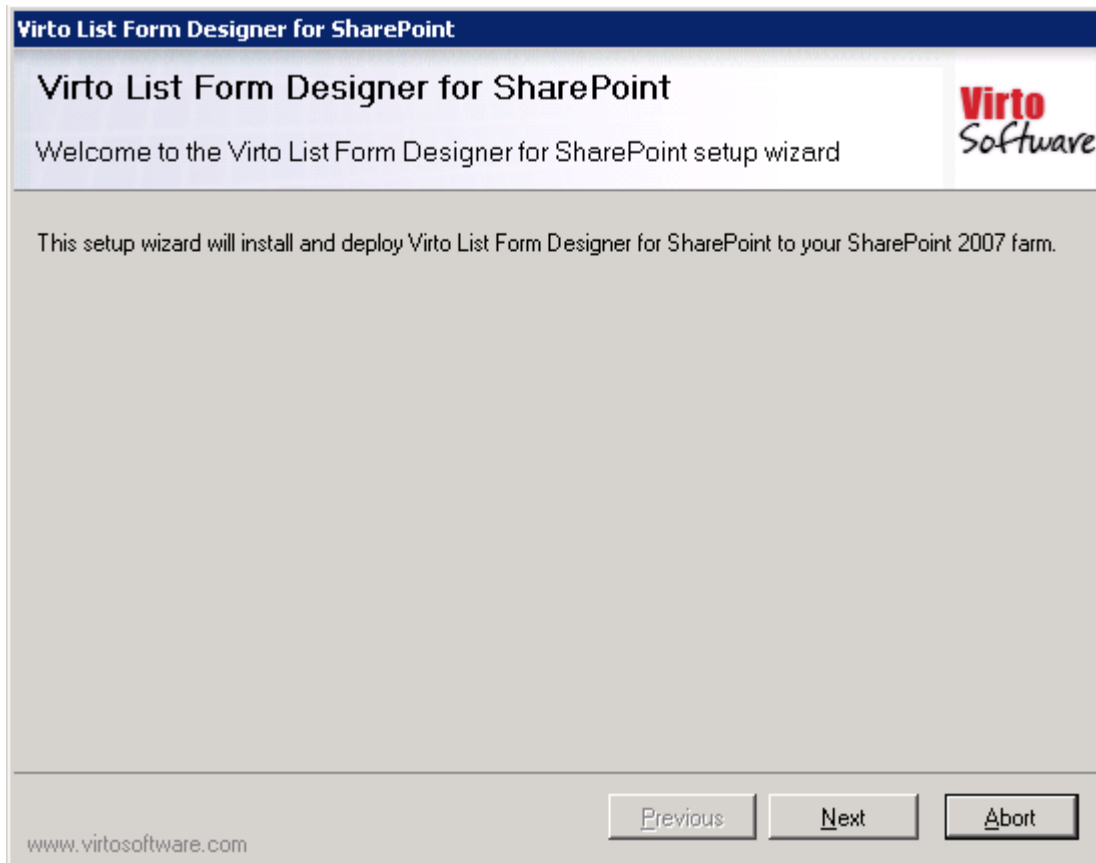
Installing Virto List Form Designer

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
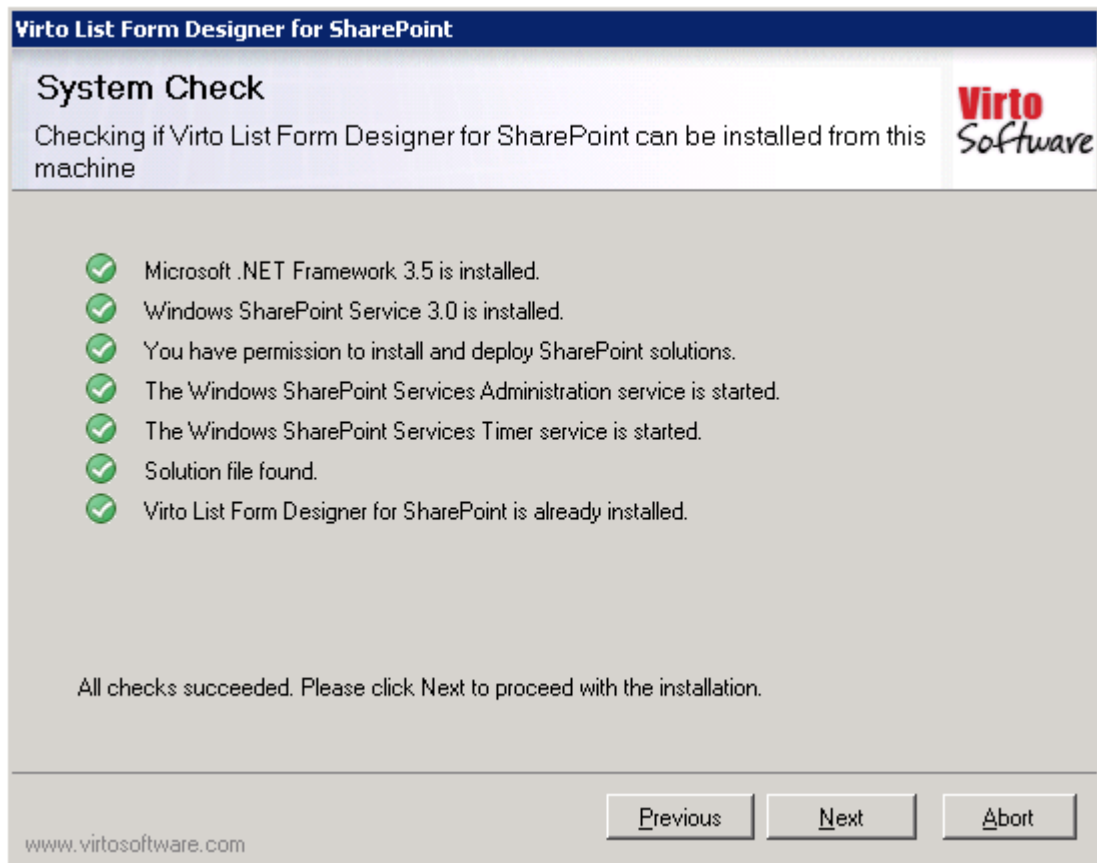
List Form Designer.

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.
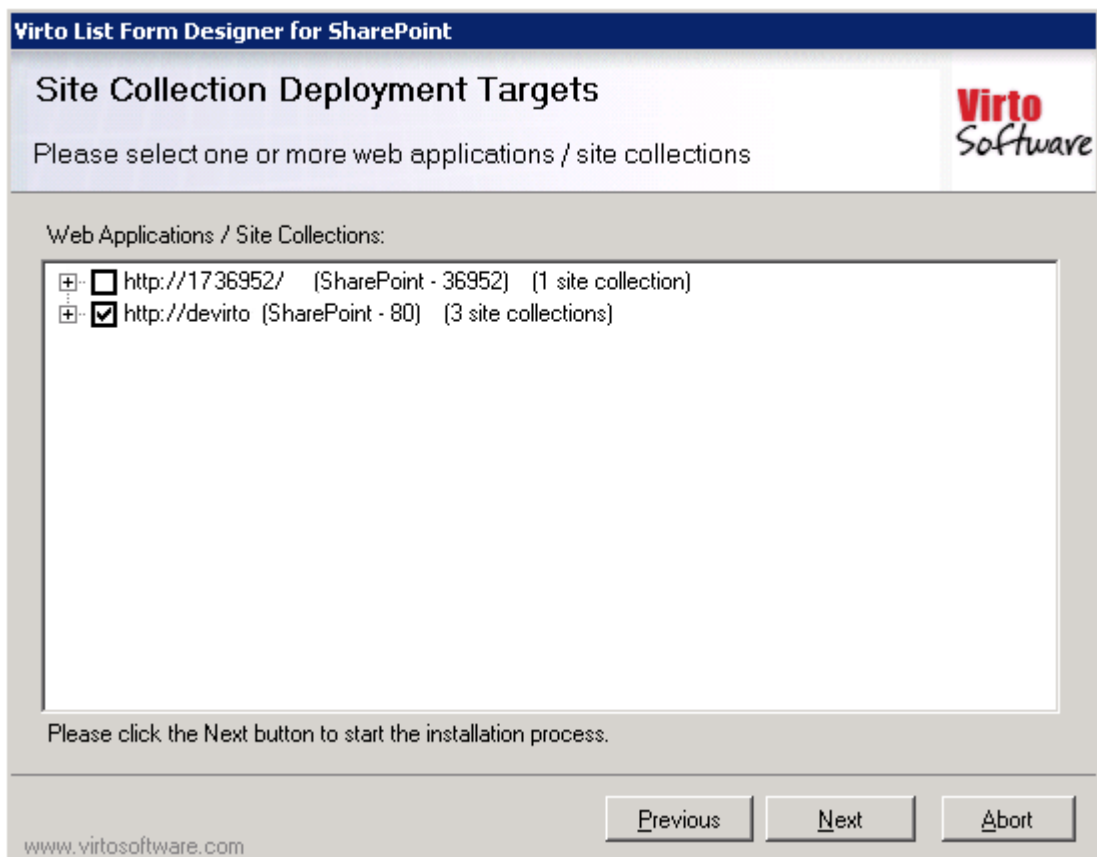
The setup wizard window will appear.

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".

Virto List Form Designer for SharePoint

System Check

Checking if Virto List Form Designer for SharePoint can be installed from this machine

Virto Software

- ✅ Microsoft .NET Framework 3.5 is installed.
- ✅ Windows SharePoint Service 3.0 is installed.
- ✅ You have permission to install and deploy SharePoint solutions.
- ✅ The Windows SharePoint Services Administration service is started.
- ✅ The Windows SharePoint Services Timer service is started.
- ✅ Solution file found.
- ✅ Virto List Form Designer for SharePoint is already installed.

All checks succeeded. Please click Next to proceed with the installation.

www.virtosoftware.com

[Previous] [Next] [Abort]

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

Virto List Form Designer for SharePoint

Site Collection Deployment Targets

Please select one or more web applications / site collections

Virto Software

Web Applications / Site Collections:

☐ http://1736952/   (SharePoint - 36952)   (1 site collection)
☑ http://devirto (SharePoint - 80)   (3 site collections)

Please click the Next button to start the installation process.

www.virtosoftware.com

[Previous] [Next] [Abort]

Warning: *You must be logged in to the SharePoint server with a Site Collection Administrator account to automatically activate this feature.*
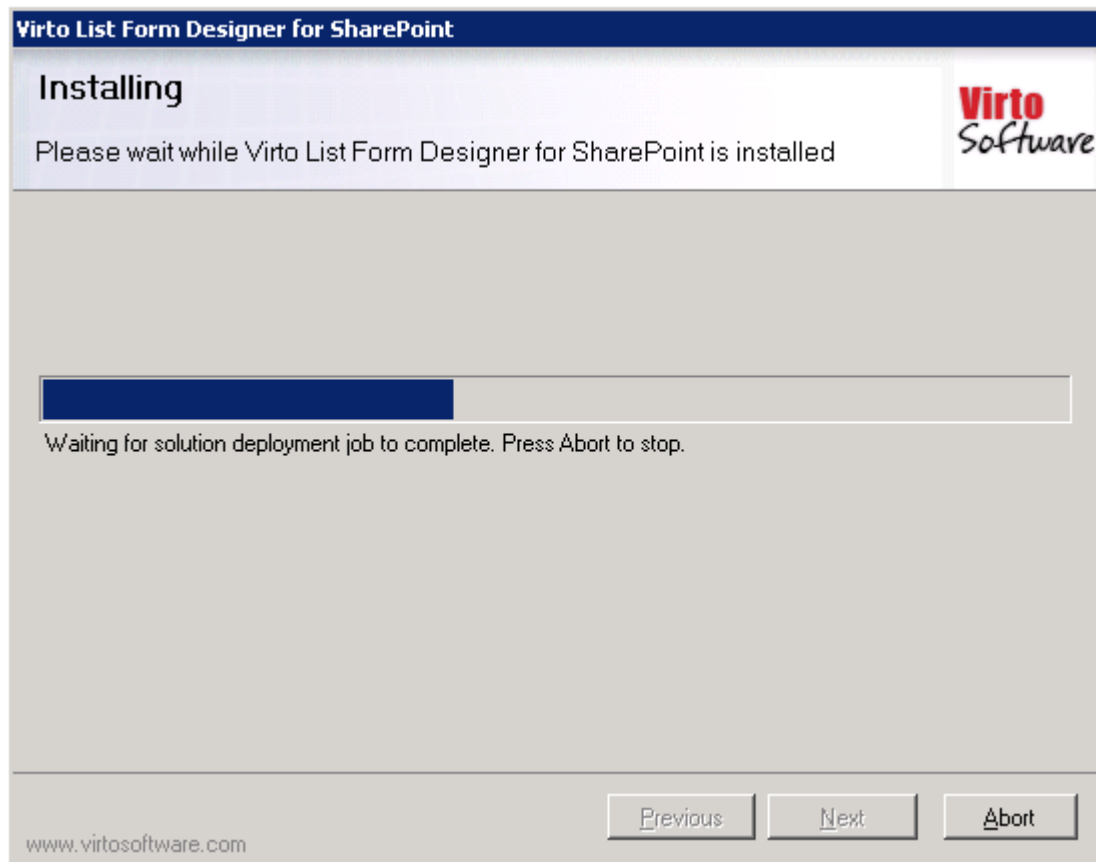
Then click "Next".
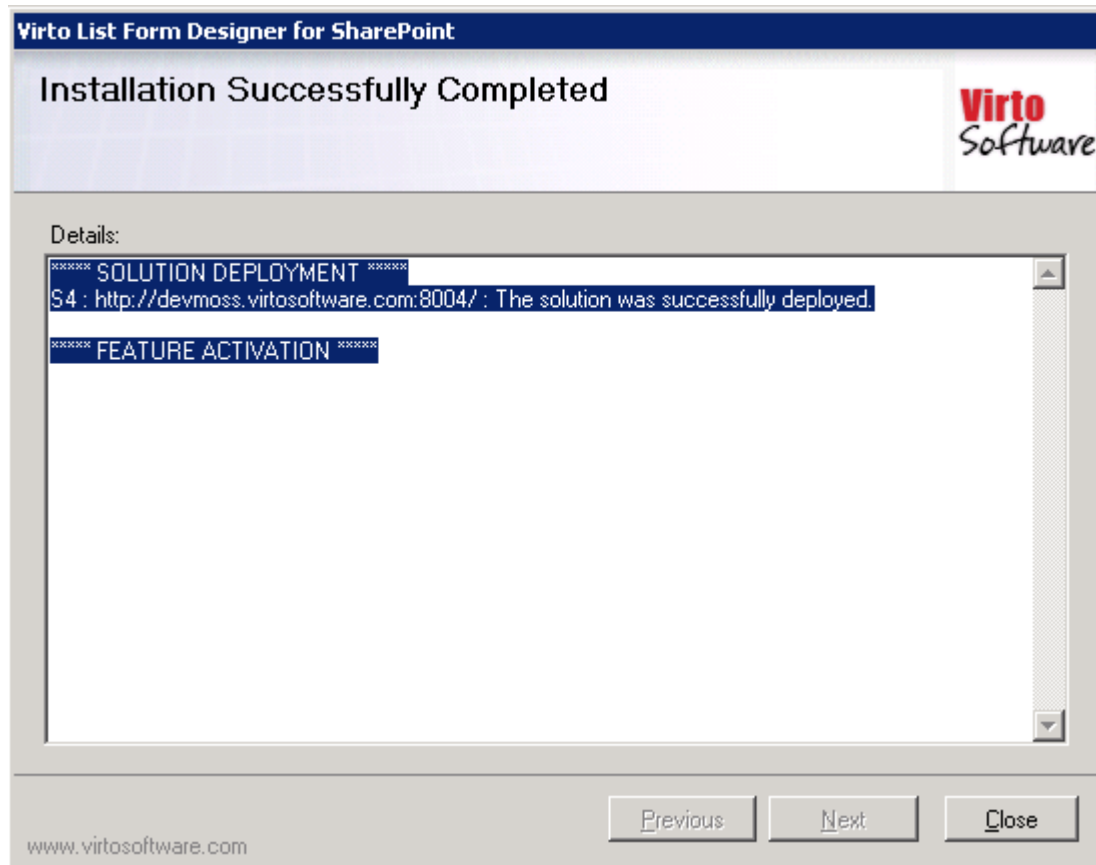
Click "Close". The installation is completed.

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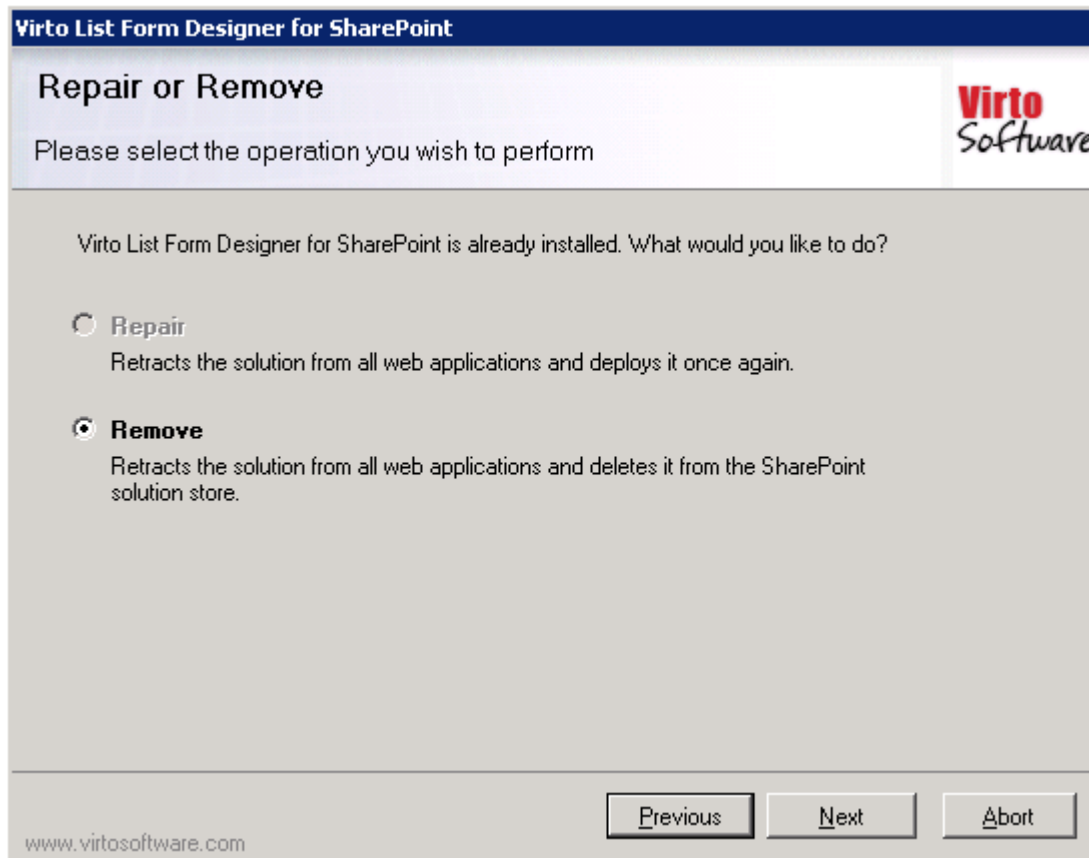
Note: after uninstalling Virto Form Designer, all the settings applied to SharePoint lists with the component will be removed.

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.

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.

On "Virto Form Designer Settings" page use "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.

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

New Form Design

Click "Design form" button opposite required list 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:

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.

Fill out fields in the open window: enter section title and select view type.
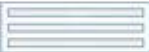
Add Section
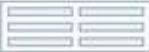
Title: Start date and End Date

☑ Show Section Border
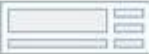
☑ Show Section Title

View Type:

○ One Col

◉ Two Cols 1:1

○ Two Cols 1:2

○ Two Cols 2:1

Cell Padding: 0

Save   Cancel

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.

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".
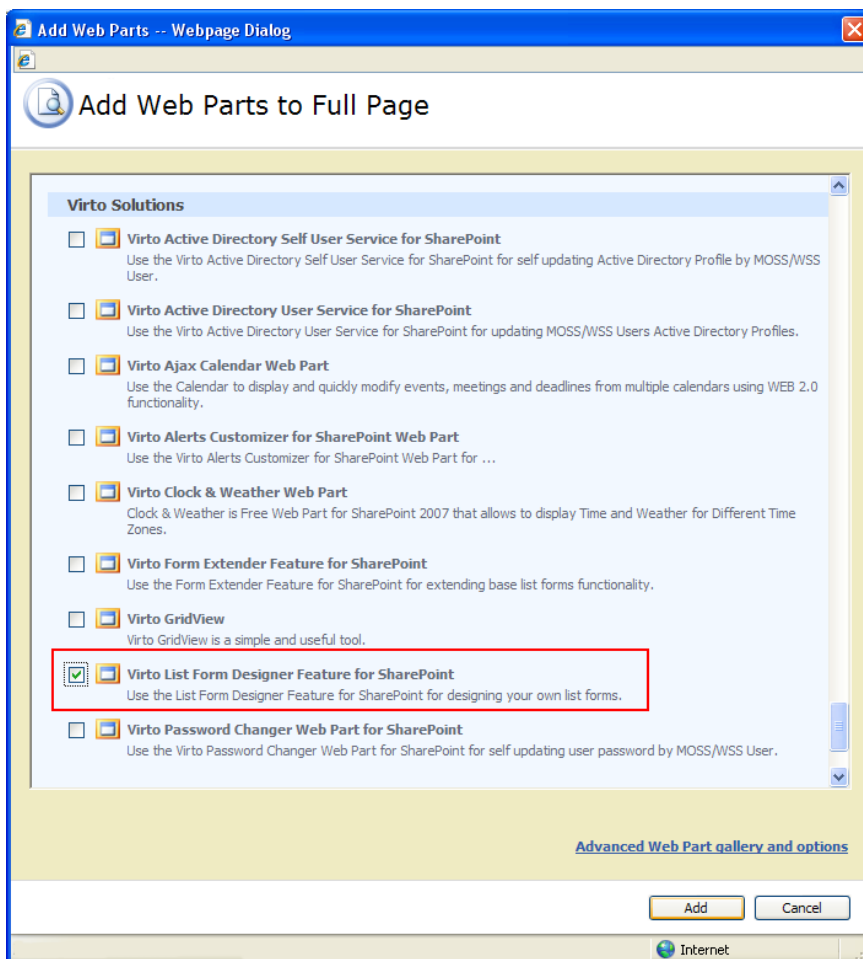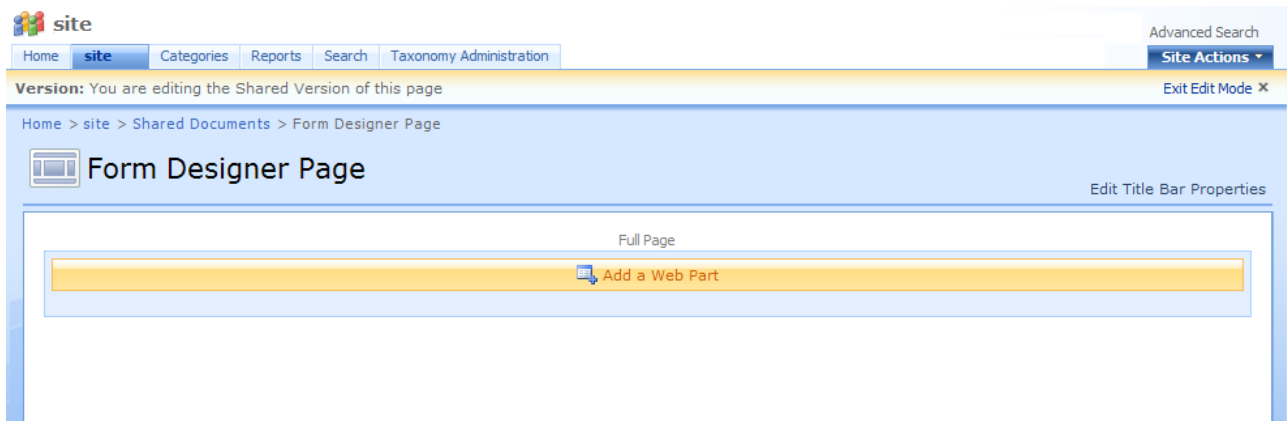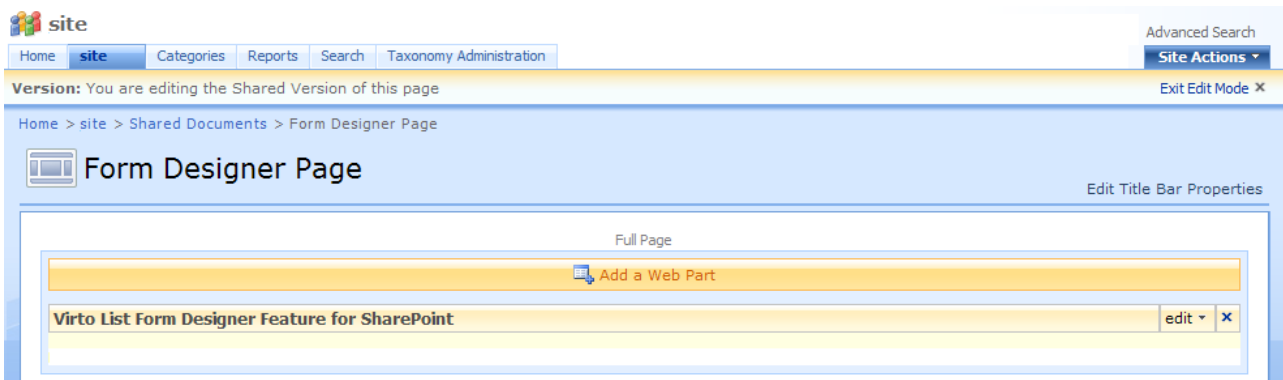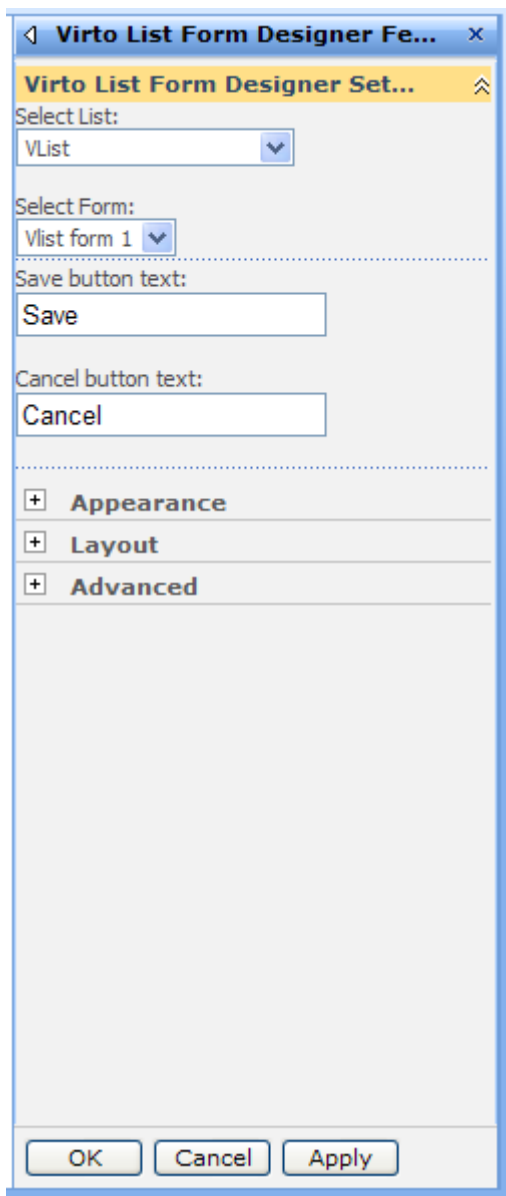
Click "Edit – Modify Shared web part".
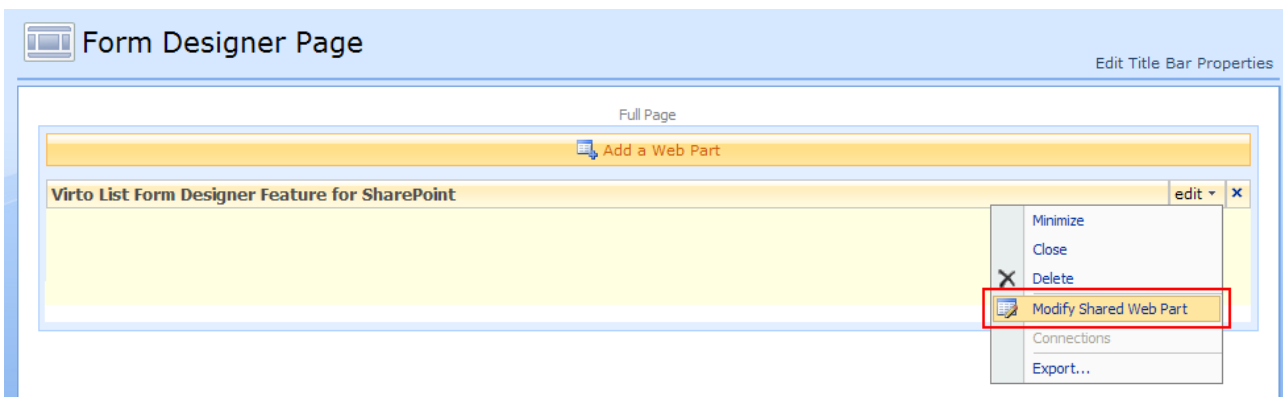
Now select list from your SharePoint site, select list form and define text for "Save" and "Cancel" buttons.
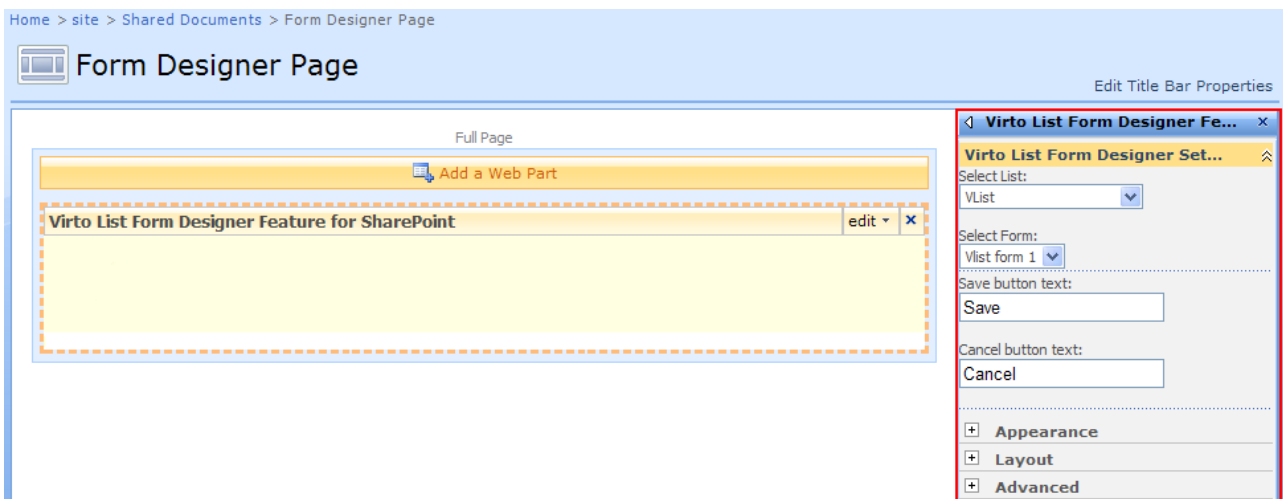
Click "OK" to save the settings and return to the page.

Working with List Forms on SharePoint Site Page

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

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

The note will appear in the corresponding SharePoint list.

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