**Virto SharePoint Forms Designer
for Office 365**


**Installation and User Guide**

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# Virto SharePoint Forms for Office 365

## 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.

## Installing Virto SharePoint Forms for Office 365

1) Download the Forms Pro from the product page Link.

2) Add it in the app catalog on your site in "Apps for SharePoint".

You will find the app catalog library by navigating to your Office 365 admin center, selecting "SharePoint" under the "Admin" section, then the "apps" navigation link left, and then App Catalog under the listed links.

Depending on your O365 subscription plan you will need to navigate to your app catalog directly using the web address: https://[your_domain_name].sharepoint.com/sites/AppCatalog/.
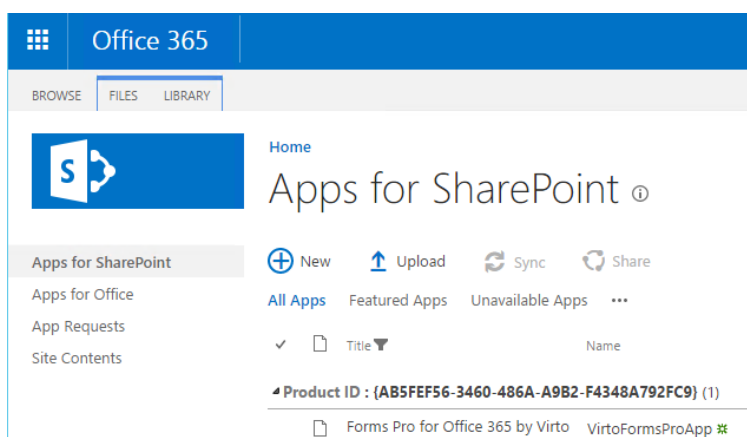
3) Go to the site where you will add Forms Pro for Office 365.

4) Click "Site content", add a new app and choose the link "From Your Organization", click "Forms Pro for Office 365 by Virto" icon, and trust it.
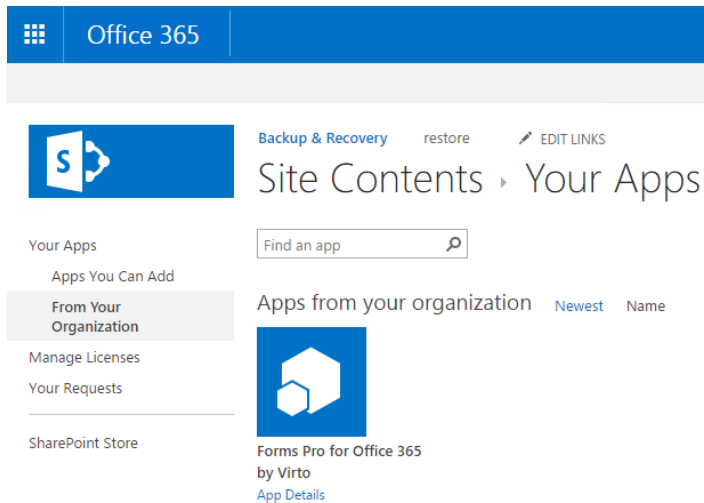


5) After that Virto Forms icon will be added on the Ribbon pane ("List" tab), so you can launch it directly from your Lists or Document Libraries. Or you can launch it from Site Contents on Site Collection where you've installed Forms Pro App.
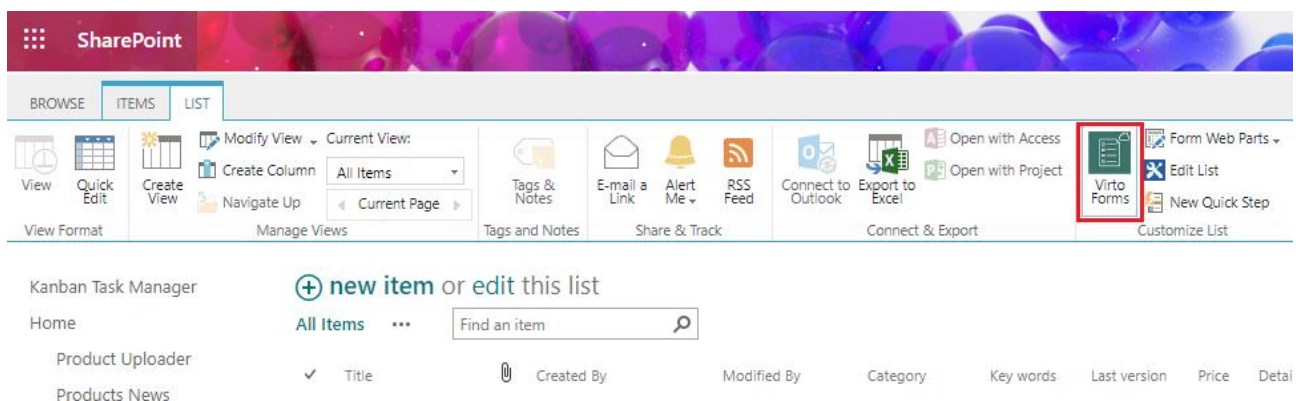


6) Now you are ready to create custom forms in your SharePoint!

The installation is completed.

## License Activation

To see full instructions for the successful activation of your component, please read "New Virto Web License Manager Update Launched" in our blog.

# Edit Settings Permissions of Virto SharePoint Forms Designer

## Using SharePoint Designer on the Root Site Collection

Even if a user has full control permission on the root site, he may not have permission to add and save SharePoint Forms Designer Add-in to SharePoint root site collection. This permission behavior can vary from tenant to tenant.

To check the user permission, open "Site Settings", then select "Site Permissions" under the "Users and Permissions" block.

Here you can check the user or group permissions for the root site. If you can`t add and customize pages, you can`t add and save SharePoint Forms Designer to the root collection as well. This issue with add-in saving doesn`t appear on subsites.



In order to fix this permission issue, do the following steps:

1. "Add and Customize Pages" permission on the previous screenshot is from the site level, not from the list permission level. Even if you have full control in the list permission level, you may not have the site level permission. Add a new permission level, that includes only the "Add and Customize Pages" permission and create a new SharePoint group with this permission level.
2. Then add yourself into the SharePoint group to get the "Add and Customize Pages" permission. You must have enabled Custom Scripting in the SharePoint admin center. Go to SharePoint admin center> Settings> Custom Script.

**Custom Script**

Control whether users can run custom script on personal sites and self-service created sites. Note: changes to this setting might take up to 24 hours to take effect.

For more information, see http://go.microsoft.com/fwlink/?LinkId=397546

○ Prevent users from running custom script on personal sites
● Allow users to run custom script on personal sites

○ Prevent users from running custom script on self-service created sites
● Allow users to run custom script on self-service created sites

*Note: Any change to the scripting setting made through the SharePoint Online admin center may take up to 24 hours to take effect. Or you can run in SharePoint online management shell the following command:*

*Connect-SPOService -Url https://<yoursitename>-admin.sharepoint.com*
*Set-SPOsite https://<your site url> -DenyAddAndCustomizePages 0*

If you have SharePoint Designer installed on a SharePoint site without SharePoint administrators, you have to run the command above to unblock permission to add and customize pages.

## Create and Edit Virto Forms Permissions

When you have permission to add and customize pages in SharePoint (see the instruction above), you can run Virto Forms Designer from an icon on the ribbon or Site Contents.

Open the forms designer settings Click on the button "Users" on the Virto Forms Designer ribbon.



The site administrator who added the add-in to current site collection is displayed in the list automatically. Users with site administrator permissions can't be deleted from this list.

# Virto SharePoint Forms for Office 365 Administration and Usage

## 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 Office 365 will be opened in the new window.
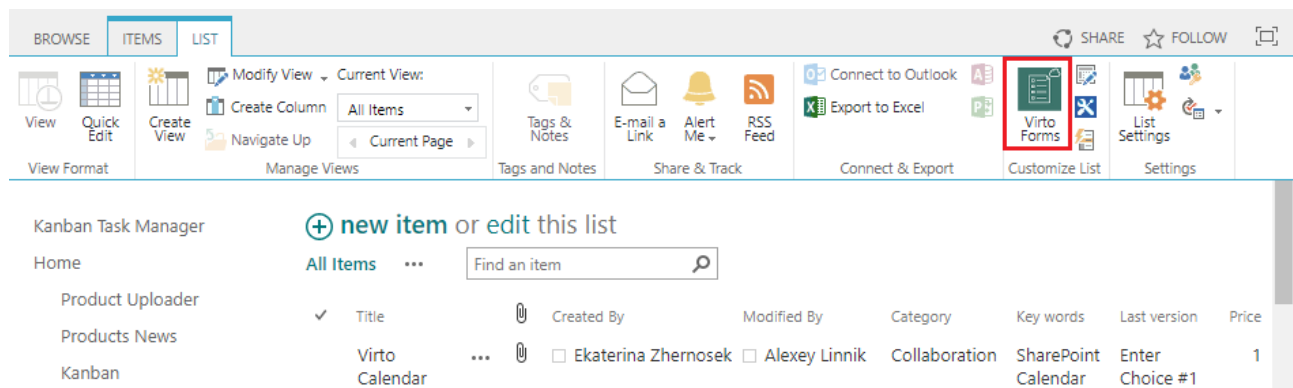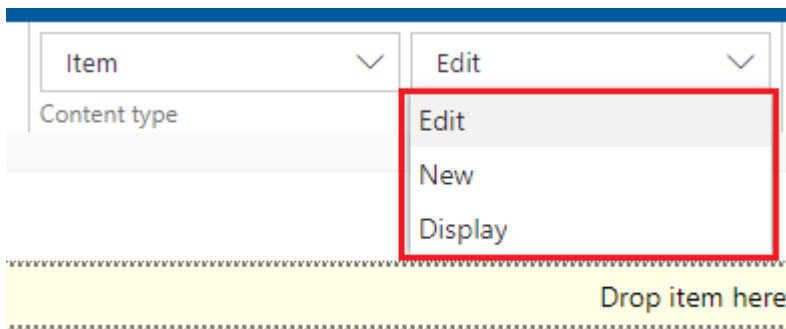


On the page of Virto SharePoint Forms for Office 365 you can create a form view for a folders structure or create a form view for list items in a SharePoint library.
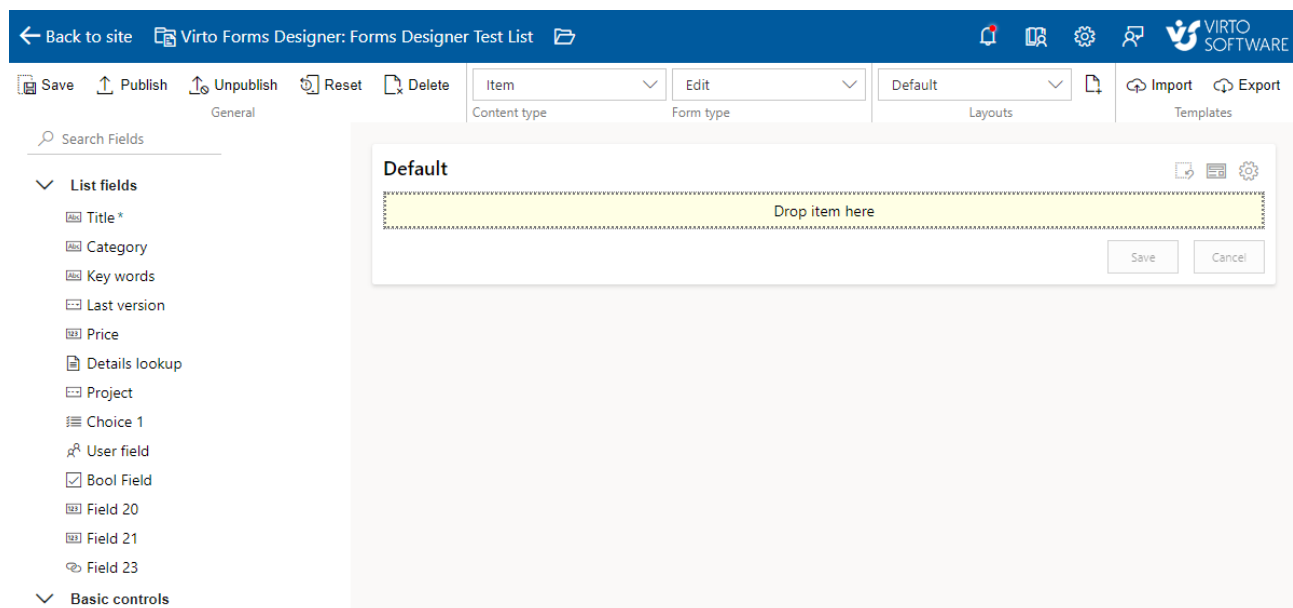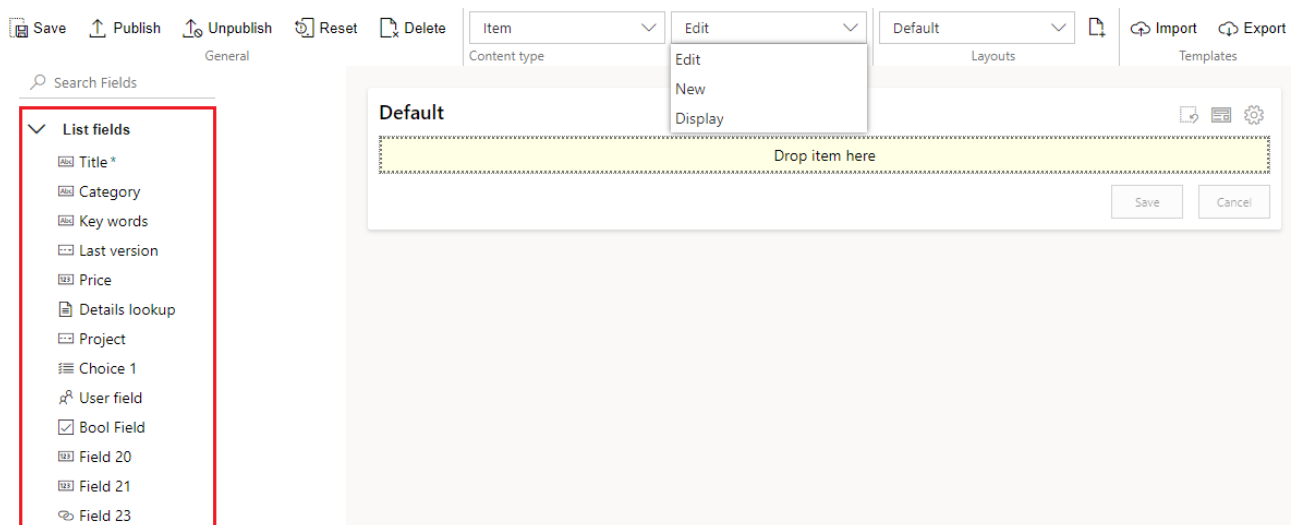


You can define the form for a list item or folder:
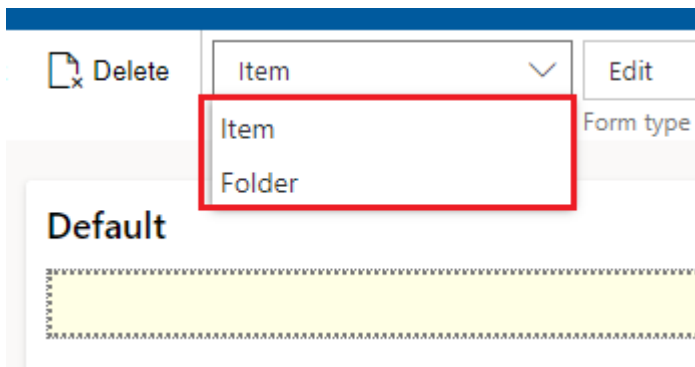
You can define the edit, view or display dorm:



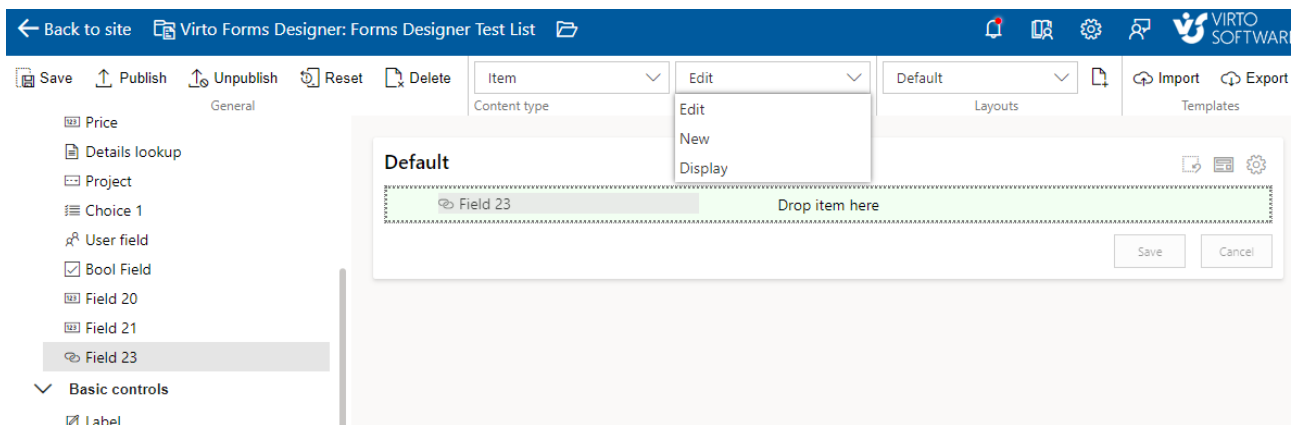All the existing fields of the list are displayed on the right.



Basic controls for the SharePoint form are under the list fields.
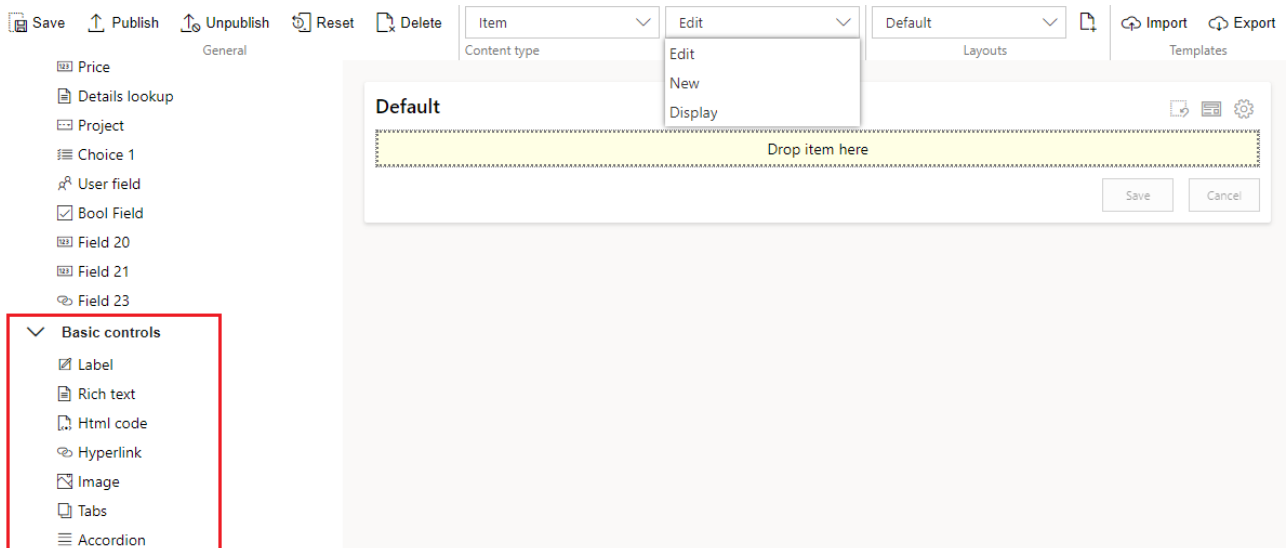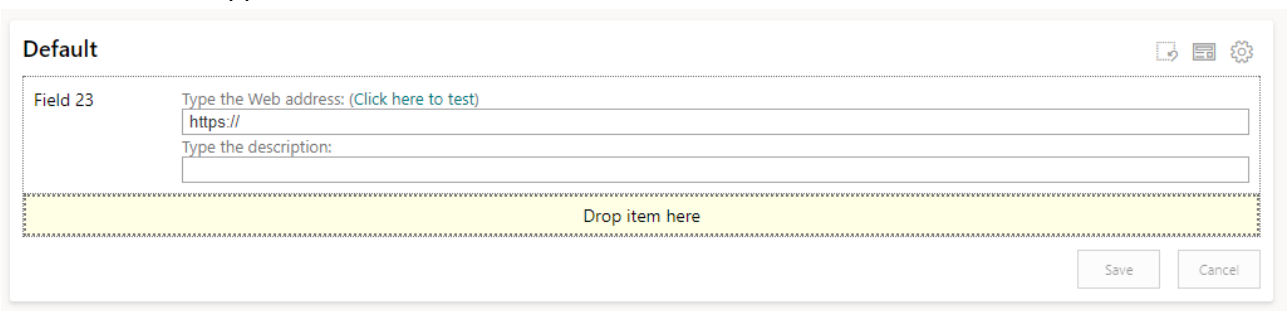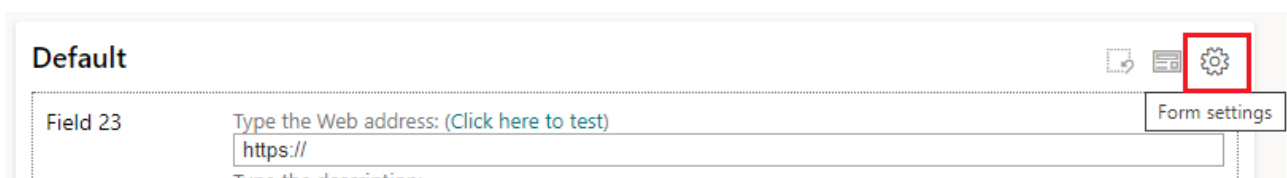
Now you can design a SharePoint form, using drag and drop function. Pick an item and drag and drop it to the form.



The chosen item appears in the form.



To define additional parameters of the chosen controls, click the gear icon in the right top corner of the form.

Here you can define the title of your form, its priority, width and permissions.



To make changes for the fields, just click the added field. Here you can change the title, define the label properties and control properties.



You can also adjust the appearance of controls, for example, tabs. Click the control and make the required changes: title, text color, style and size as you wish.

Accordion, tab, and panel have additional field ID. This code is used, when you enhance your forms with build-in JavaScript editor.



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.

*Note*: no more than 3 controls should be located in a single row.



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



*Note*: you can add any fields from the current list if you have more rights than "Read-only".

*Note*: you can't add fields of "Attachment" type.

*Note*: fields from the 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. Click the item and scroll down to the "Permission" block to define the visibility.

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



*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 can set permissions to other sections or tabs of the same element and apply them to hide other fields. For example, section 1 with required field is visible, but section 2 can be hidden.*

## Basic Controls

### Tabs

You can create multiple tabs to optimize your SharePoint form view. To add more tabs, click "Add section" and type tab title in the control properties.

To remove a tab, use delete icon.



Then save changes to display created tabs.



All the tabs may contain any other controls, including other tabs and accordions.

## Accordions

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

Accordion, tab, and panel have additional field ID. This code is used, when you enhance your forms with build-in JavaScript editor.

To add more accordions to the existing form, click "Add section" and type the name of it.



To remove the accordion section, click delete icon of a chosen row.



You Cal also define security permissions for the accordion sections.

*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 can set permissions to other sections or tabs of the same element and apply them to hide other fields. For example, section 1 with required field is visible, but section 2 can be hidden.*

## Panel

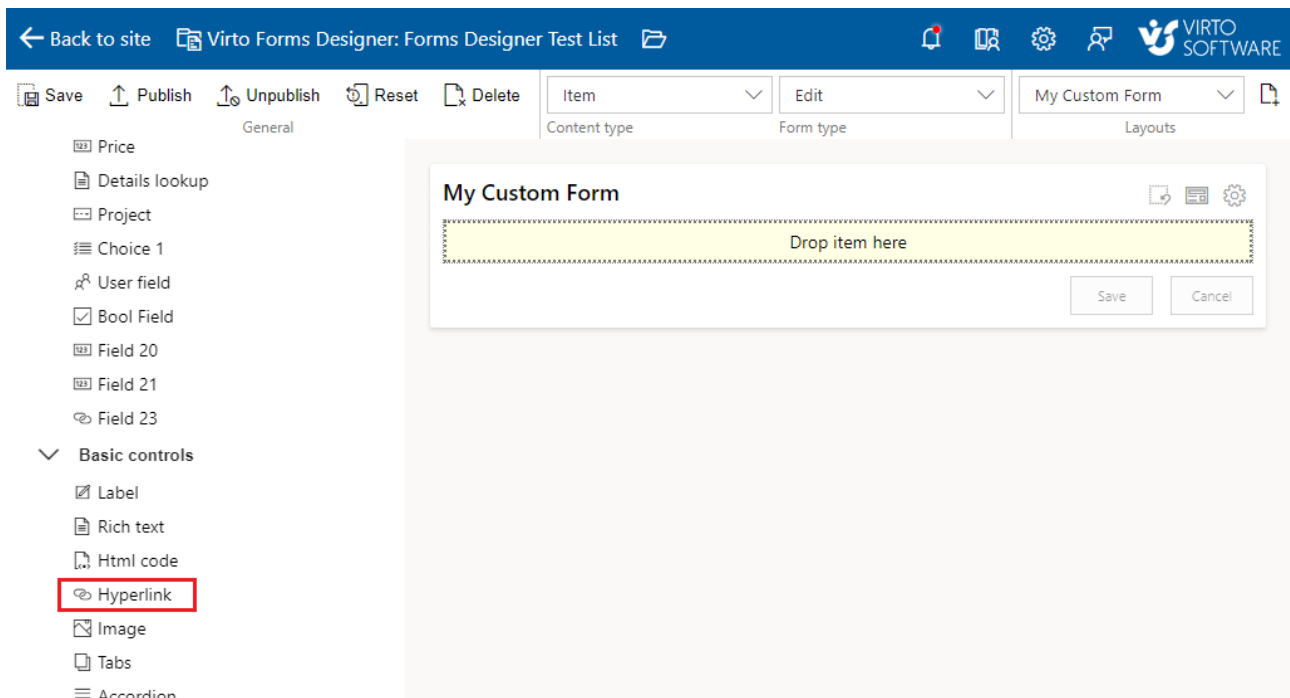A panel can contain any other controls, including accordions, tabs, and other panels.



You can also define security permissions for the panel the same way as for tabs and accordions.

## Hyperlink

You can add links to your SharePoint Forms. Pick "Hyperlink" in the list of controls and drop it to the form.
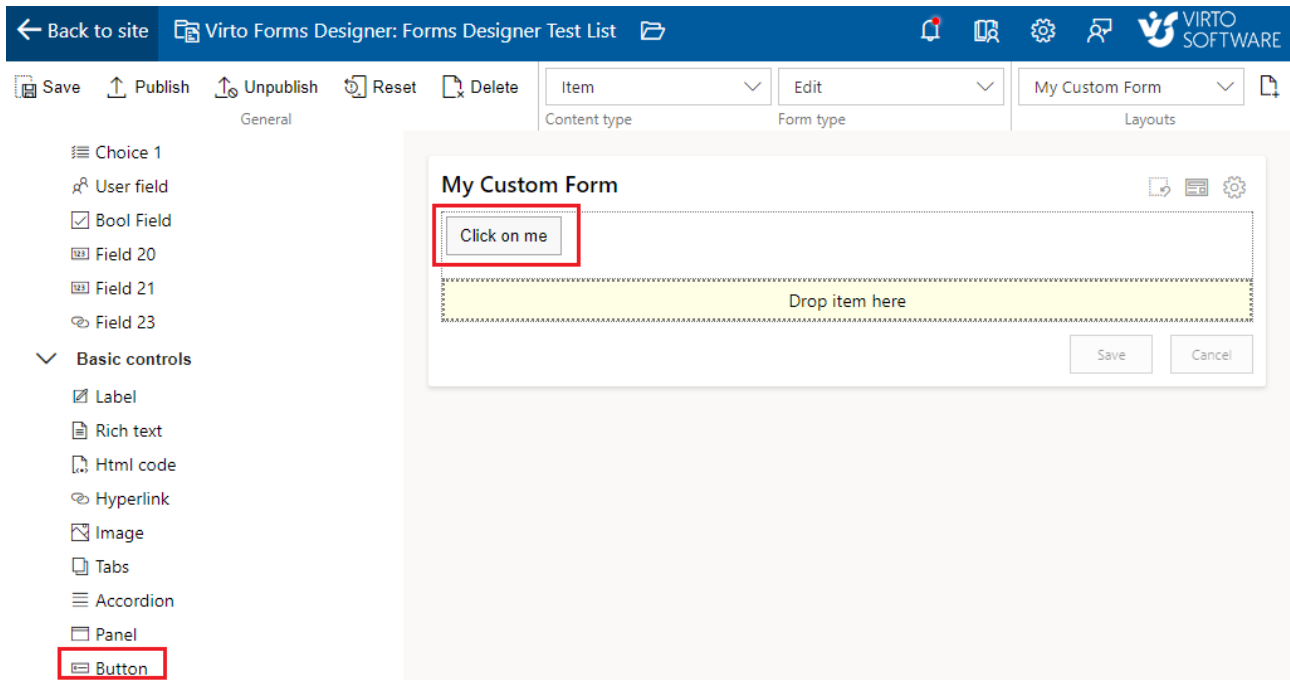
In the block of hyperlink properties, you can define the following settings:

- a link name in the format as follows: http://yoursite;

- label text of hyperlink;

- font size (optional). Choose text size from dropdown or with slider. Define font weight and style;
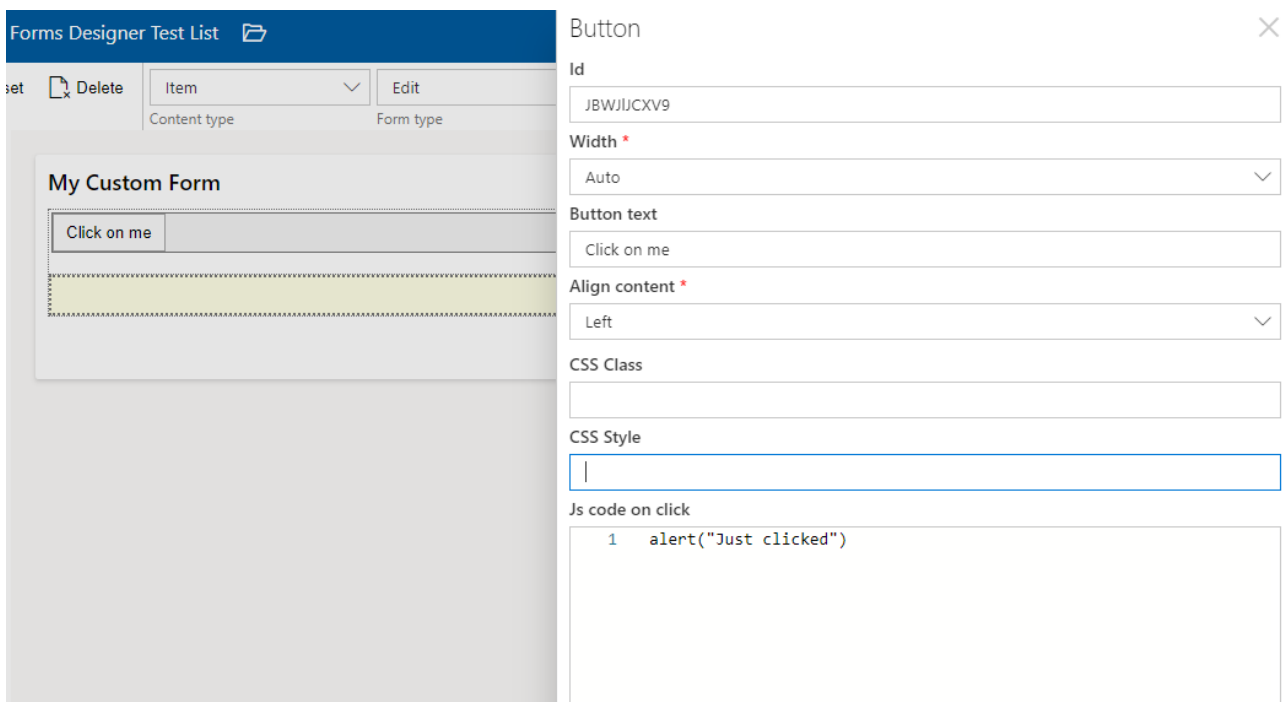
- font color.
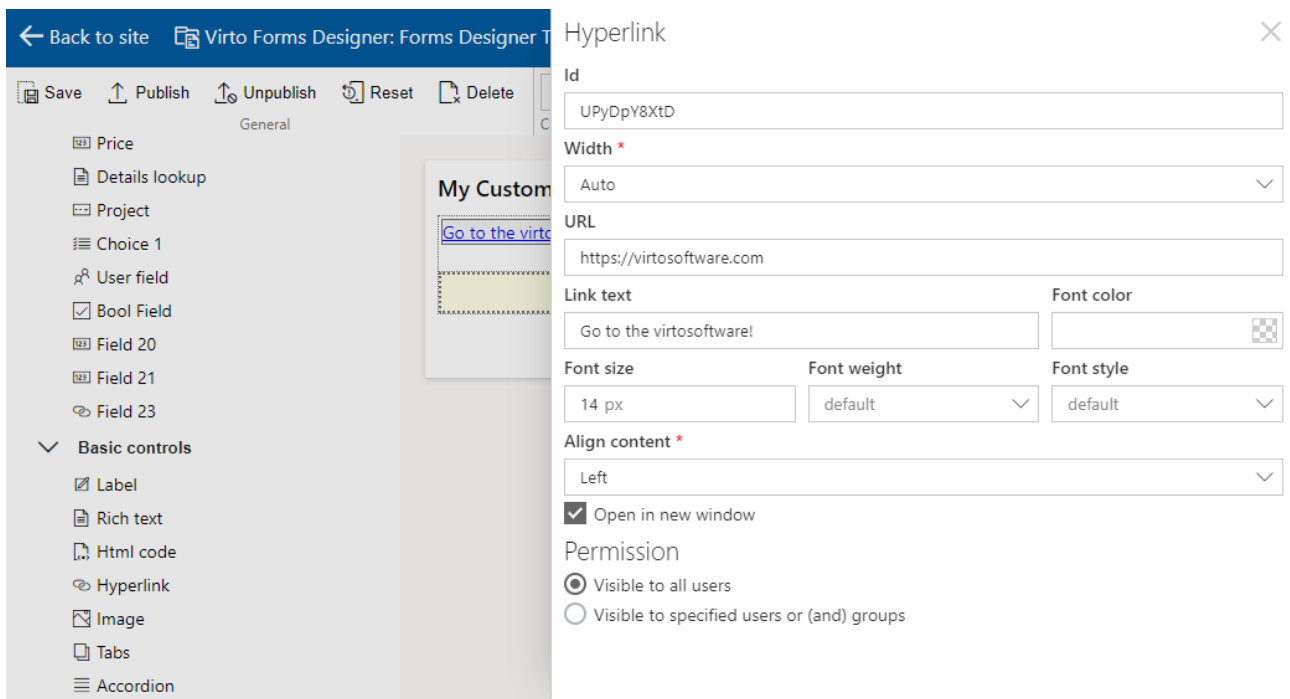


## Button

With this function, you can execute a JavaScript event by a click on this added button.

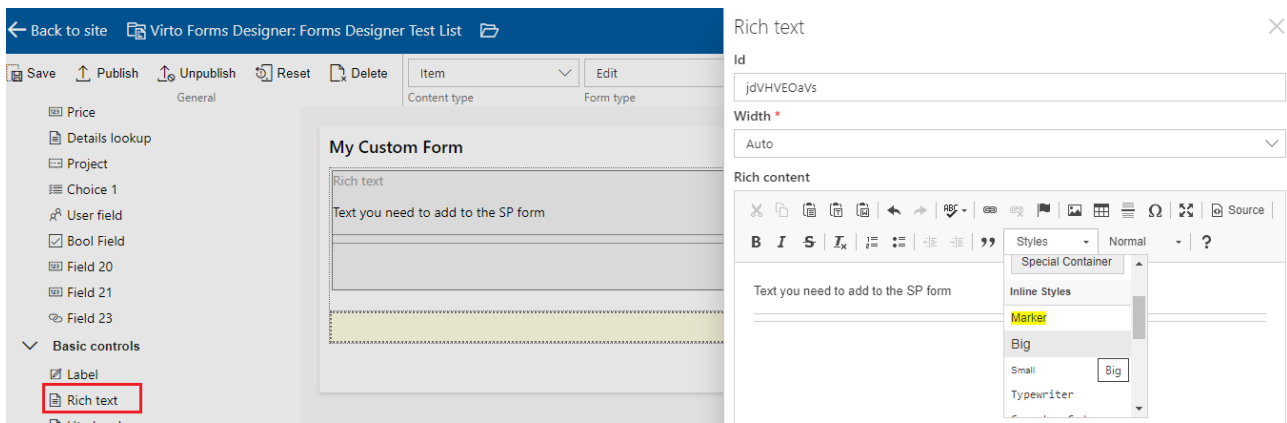You can customize the button appearance with the CSS styles.
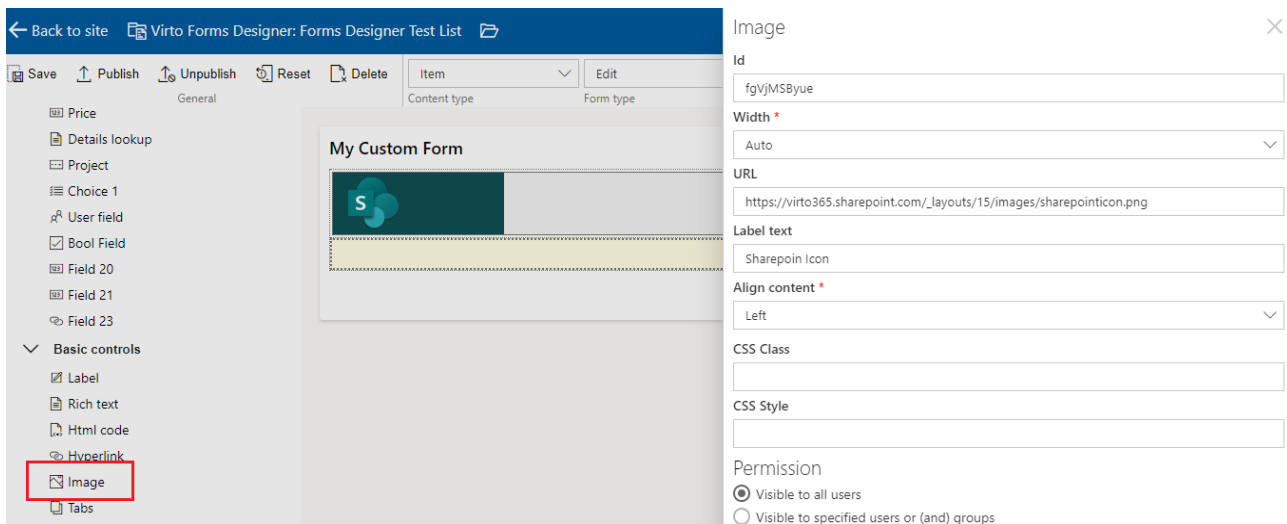


## Rich Text

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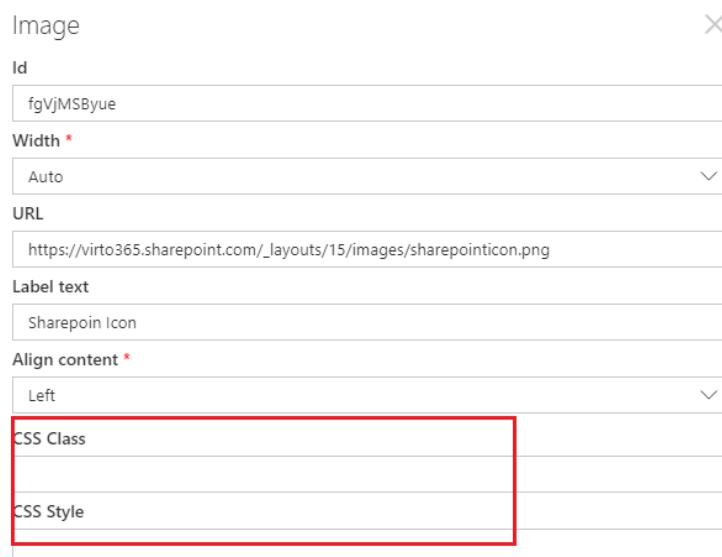
## Image

The SharePoint Forms for Office 365 app allows you to add images to your SharePoint form. You need to paste the image address in the "URL" field.



You can add custom CSS styles to the images as well.
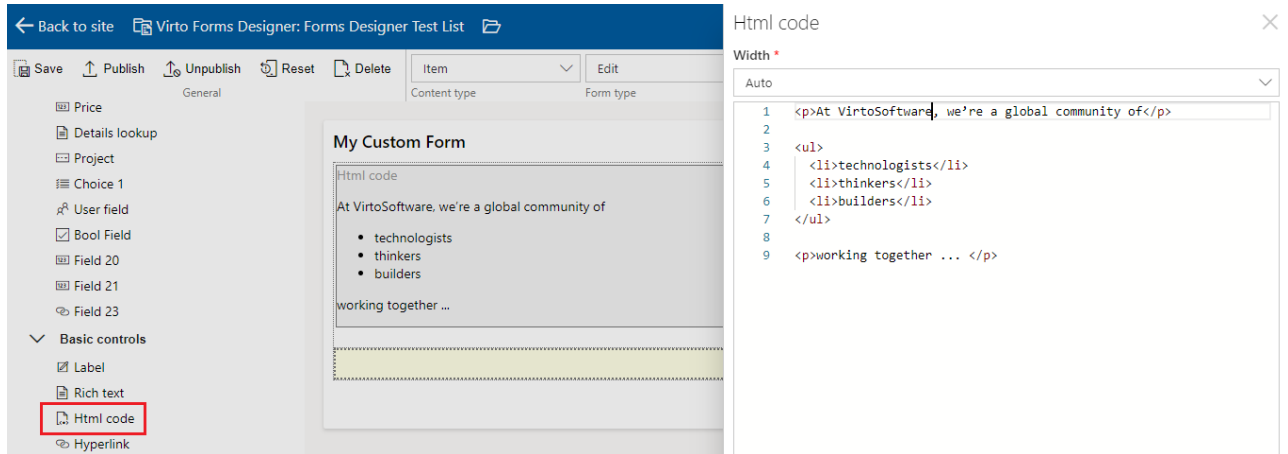
## HTML

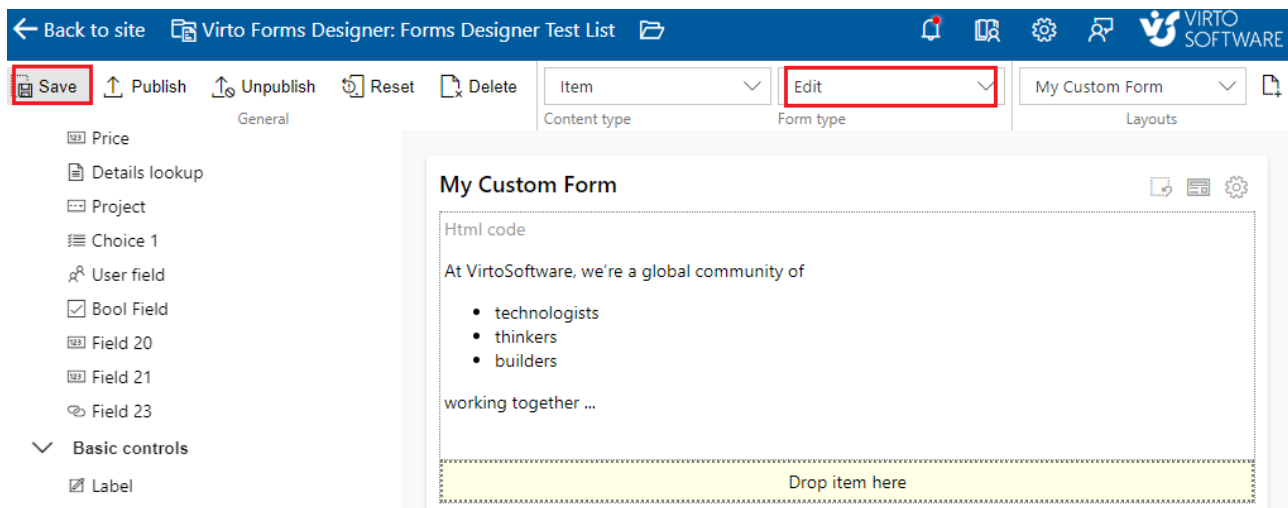You can create any interactive HTML-based controls in the form field.
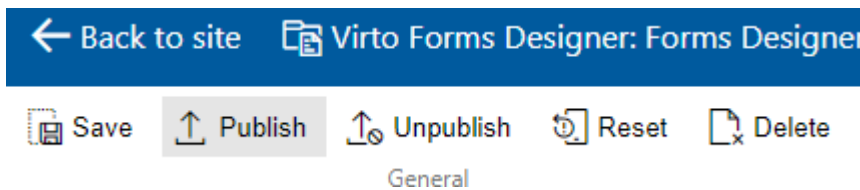


# Saving a SharePoint form

You can create SharePoint forms for the following views of an item or folder:
- Edit form;
- New form;
- Display form.

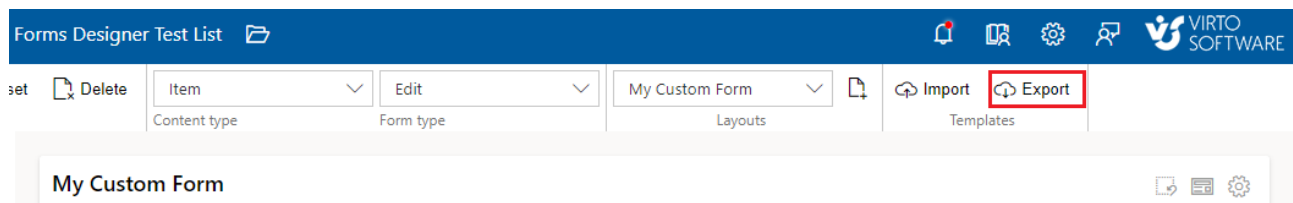Choose the required view and click save to apply the adjusted form for this view.



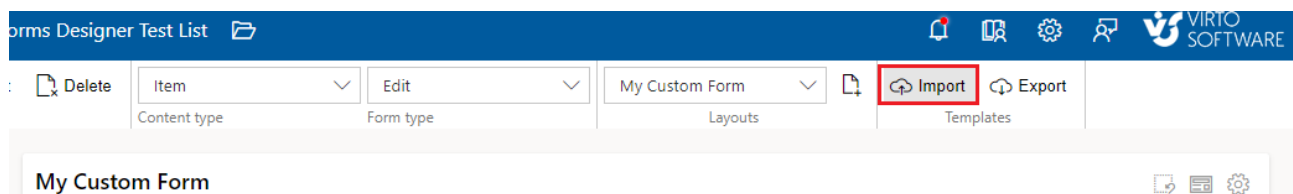Click "Publish" if your form is ready for publishing on your site.

← Back to site 🗋 Virto Forms Designer: Forms Designer

🗋 Save    ↑ Publish    ↑⊘ Unpublish    🕔 Reset    🗋 Delete

General

## SharePoint Form Templates

You can save created SharePoint form template and use it later for any other list or library.
Click the "Export" button and save the template in .txt format.

Forms Designer Test List   🗁          🔔 📖 ⚙ 🗗 **VIRTO SOFTWARE**

set   🗋 Delete   | Item ▾ | Edit ▾ | My Custom Form ▾ | 🗋 | ☁ Import | ☁ Export |

Content type     Form type     Layouts     Templates

**My Custom Form**

Choose "Import" button to apply the saved form template to a new form.

orms Designer Test List   🗁          🔔 📖 ⚙ 🗗 **VIRTO SOFTWARE**

:   🗋 Delete   | Item ▾ | Edit ▾ | My Custom Form ▾ | 🗋 | ☁ Import | ☁ Export |

Content type     Form type     Layouts     Templates

**My Custom Form**

## SharePoint Form Layouts

Virto Forms Designer allows users to create custom form views (layouts) 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.

It is possible to hide certain fields or tabs according to a user/group permission. If defined conditions allow a user to have access to several views, the view with the highest access priority will be displayed. Click "New" in the Layouts block 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.
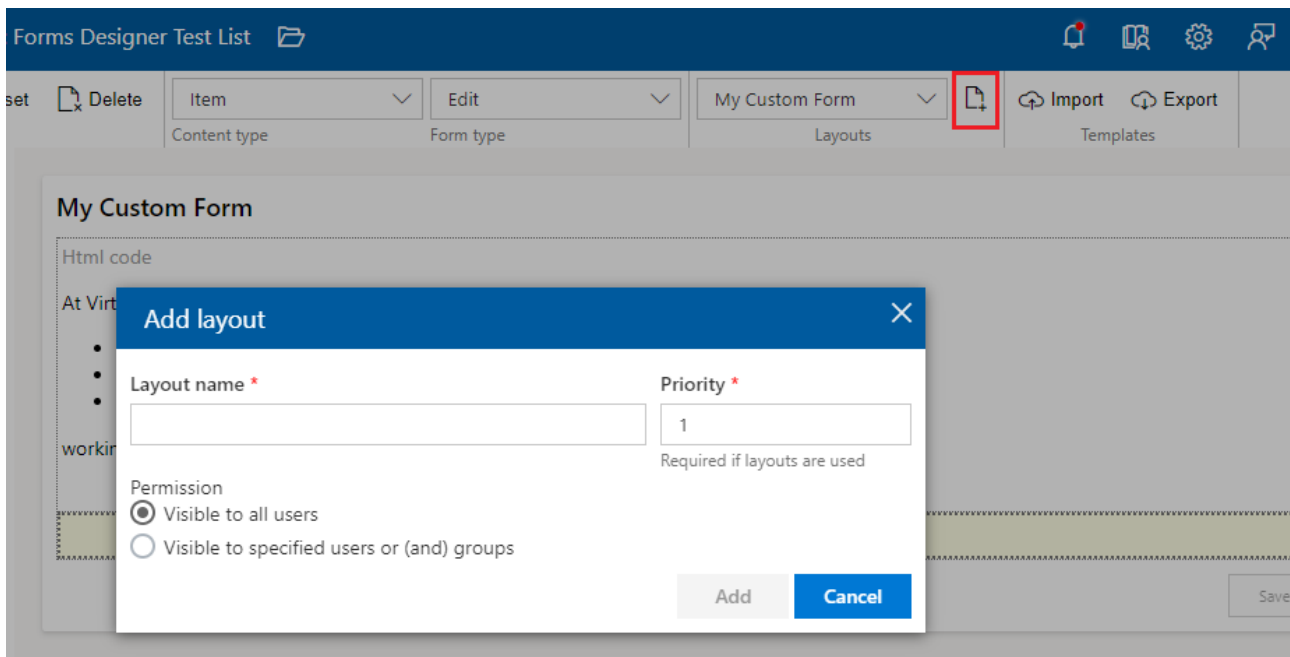
*Note: If defined conditions allow a user to have access to several views, the view with highest access priority will be displayed. The smaller is the number, the higher is the priority.*
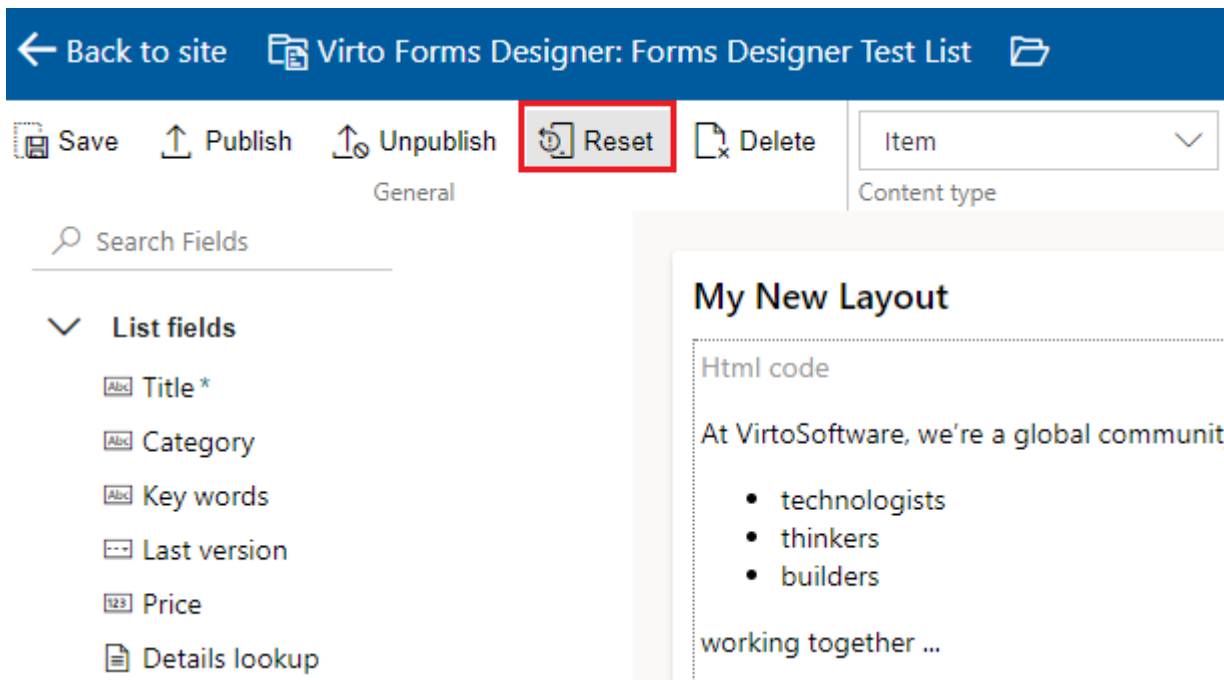
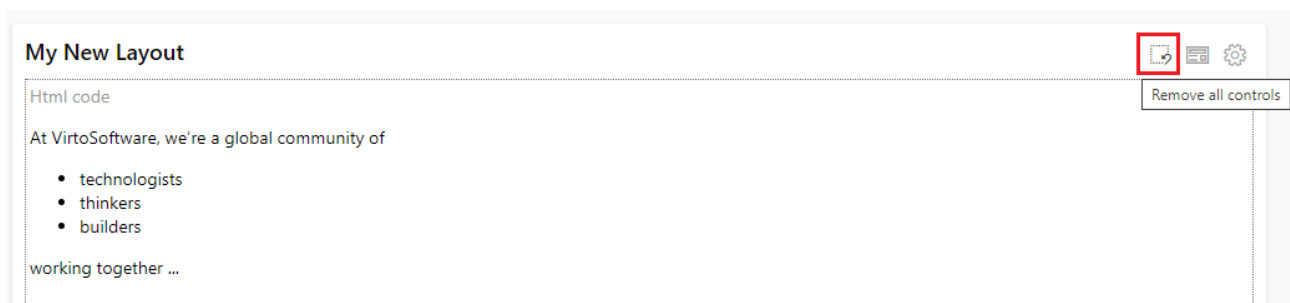Now you can edit several layouts in SharePoint Forms Designer.
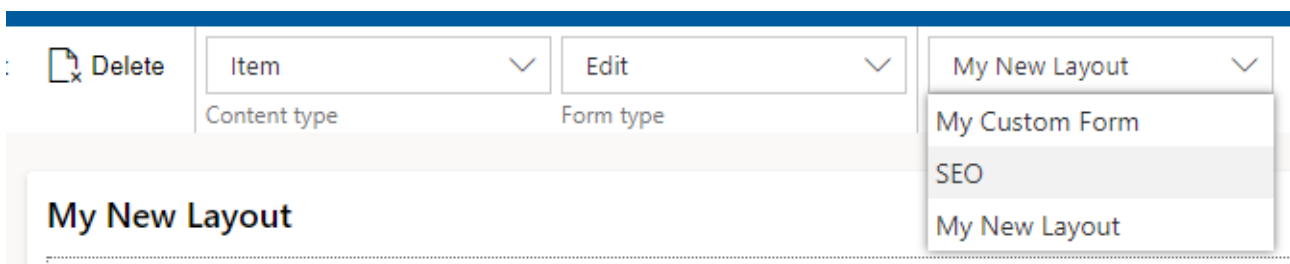


**Note:** you should save a default form view to add new layouts. For example, to add two layouts for edit form, you should save a standard edit form and then create layout 1 and layout 2.

## Reset

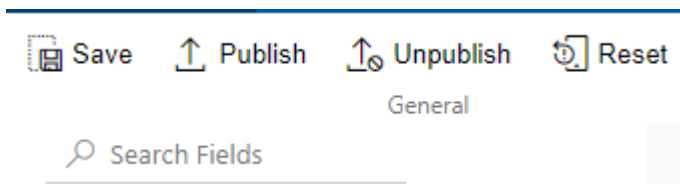Click the "Reset" button to remove all controls from a current form view.

Or you can also use the "Remove all controls" button.



## 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 the designed item views of the chosen list.



# Using the Designed Form on a SharePoint Site

When you have adjusted a list form, it appears on a SharePoint site in chosen list item views. SharePoint site users can use this form according to the rights provided by the site administrator. Go to the list and click three dots next to an item. The example of designed edit form is below.
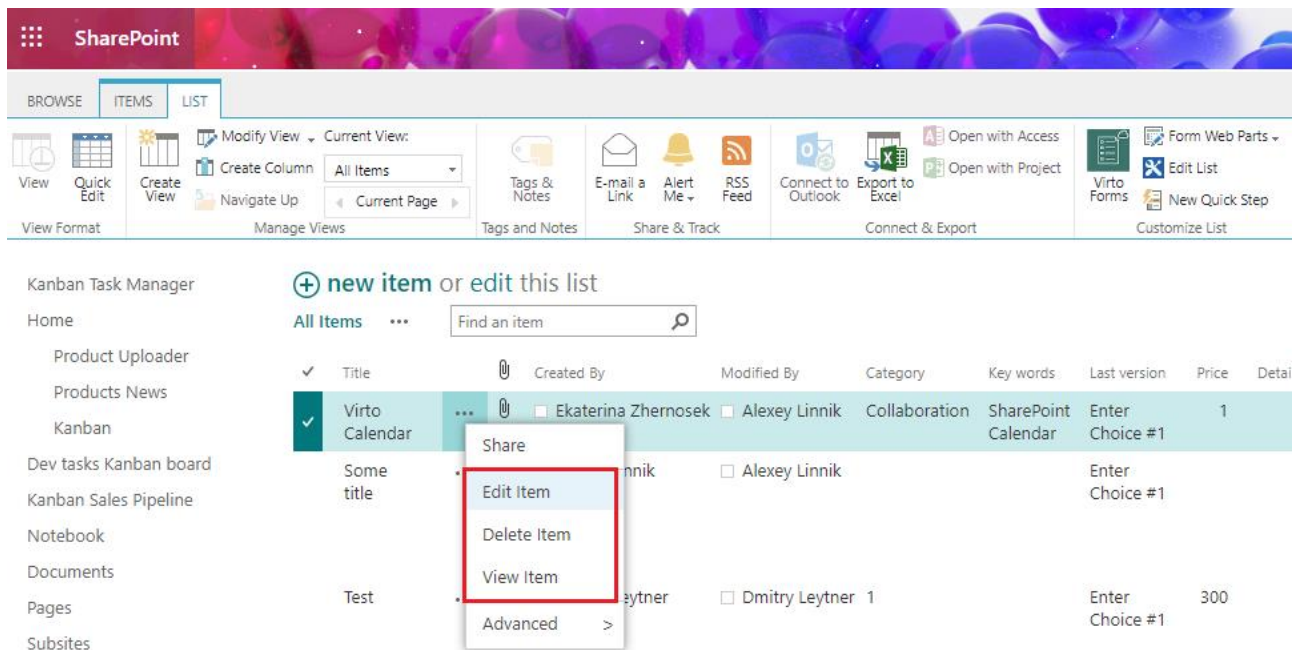


This is how the form looks after the testing adjustment.



Organize the information to appear in your SharePoint lists with a special online solution — **Virto SharePoint Forms for Office 365**.