

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 and editing SharePoint list forms.
- 2. Designing a form item layout with a drag and drop feature.
- 3. Grouping fields into tabs and accordions.
- 4. Layout templates for form, field, and section view.

System Requirements

Browser

Microsoft Internet Explorer 9 or higher is required.

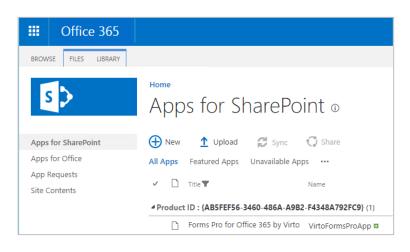
Installing Virto SharePoint Forms for Office 365

1) Download the Forms Pro app. Link

2) Add the app to your site App Catalog in "Apps for SharePoint".

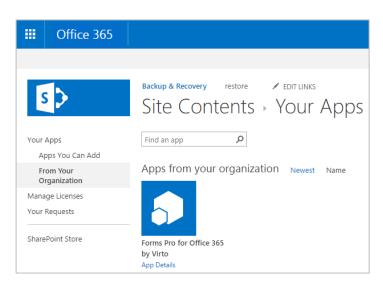
You will find the app catalog library by navigating to your Office 365 admin center, selecting "SharePoint" under the "Admin" section, then the "apps" navigation link left and then App Catalog under the listed links.

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/.

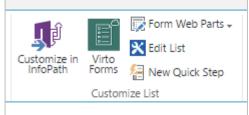


3) Go to the site where you will add Forms Pro for Office 365.

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, 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 beautiful custom forms in your SharePoint!

The installation is completed.

License Activation

To see full instruction for successful activation of your component, please read our blog.

Virto SharePoint Forms for Office 365 Administration and Usage

SharePoint Forms for Office 365

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.

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BROV	VSE ITT	EMS LI	ST												<u>.</u>		
		*	🗾 Modify View 🗸	Current View:		\bigcirc		2	6	o	100	Open with Access	J î	Ē	😿 Form Web Parts 🗸		•
View	Quick Edit	Create	Treate Column		Tags & Notes	E-mail a	Alert	RSS	Virto	Connect to E	port to	Open with Project	Customize in	Virto	🔀 Edit List	List Settings	Shared
		View	Navigate Up			Link	Me +	Feed	Alert	Outlook	Excel		InfoPath		Rew Quick Step	Settings	
View F	ormat		Manage V	lews	Tags and Notes		Share &	l Track			Connect	& Export		Customi	ize List		Settings
Hom	ie		÷) new item or	edit this lis	st											
Note	ebook		All	Items ••• Fi	nd an item		Q										
Docu	uments		~	Title		Connobil	lin .		Deer	mentation					Bundl		Free t
App	s in Testir	ng	Ŷ			Compabil	÷										
Sam	ples			Calendar Web Pa	art	SharePo or 2007	int 201	3, 2010	http:	//www.virtos	oftware	.com/manual/calend	dar-web-part		Colla	ooration	Yes

On Virto SharePoint Forms for Office 365 page use dropdown "Change form" to create a new form.

6 form types are available according to content item and folder types:

- Item edit form
- Item new form
- Item display form
- Folder edit form
- Folder new form
- Folder display form

In other words, you can create a form view for a folders structure or create a form view for list items in a SharePoint library.

In the following examples the item form will be used.

E Pack to site	Forms for Off	ico 26E by Virte		
← Back to site	Change form: (Item) Edit Form (Item) Edit Form (Item) New Form (Item) Display Form (Folder) Edit Form (Folder) New Form	ice 365 by Virto	JavaScript ACSS General Reset	Import & Export Subscription
 Choice Date and Time lookup 	(Folder) Display Form			
Number col				
Ĩ⊐ Title				
📁 text column				

As an example, you can open edit form to start creating a new form for list items editing. Actually, you can use any other form view to start working with Virto SharePoint Forms for Office 365.

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

Basic controls for SharePoint form creating are located below.

← Back to site Forms for Off	ice 365 by Virto				
✓ Edit Form Change form: New Form (Item) Edit Form ▼ Save Display Form Manage Forms General Manage Forms T Documentation	Layouts: Edit Default Control Defection Defection Manage Layouts	JavaScript ACS General Settings	Reset Impo	ን 🖹	Subscription Subscription
Version Key words Basic Controls					
 Accordion Button Form name 					
 Html Hyperlink Image 					
 Text Tabs White Space 					

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

Fields	A
Text	Tab one Tab two
Documentation	Title *
Dundle	www.virtosoftware.com
Free trial	
E Key words	
Price	
Version	
Last release date	
📕 Lookup	
asic Controls	
- Tabs	
Accordion	
Hyperlink	

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

For example, you can type titles for both tabs, add new tab or adjust security settings.

8

		Ō
Control pro	perties:	
Name:	Tab one	
Security pr	operties:	
Show t	o all users	
Show t	o selected groups and users	
Security type:	Hide Read-only	
Allowed User Groups:		
Allowed		
User(s):		

Also, you can make changes for fields. Choose text color, style and size to change its appearance.

You can hide label text by unchecking box "Visibility".

The control properties size function allows you to customize the field width.

Field name:		
Text:	Title	
Font size:	14px	•
Font weight:	Normal	T
Font style:	Normal	•
Font color:	#000000	
Visibility:	•	
Control prope	erties:	
Size:	230	
		<u>Remove</u>

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.

Title *	S	Tab one Tab two

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

	+ Add tab	
Tab one Tab two	Tab one	Ô
Title *	Control properties: Name: Tab one	
	Tab two	Î
		Remove

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 pr	operties:
Show t	o all users
Show to a start of the start	o selected groups and users
Security type:	Hide Read-only
Allowed User Groups:	
Allowed User(s):	

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

Security properties:							
Show to all users							
Show to	o selected groups and users						
Security type:	Hide Read-only						
Allowed User Groups:	Dev Owners ×						
Allowed User(s):	Alex Shell ×						

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 required field is visible, but section 2 can be hidden.

Adding sections from basic controls

Tabs

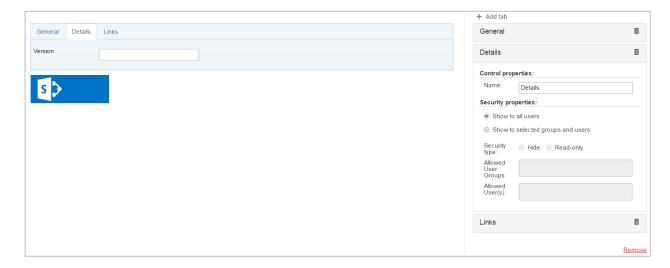
You can create multiple tabs to optimize your SharePoint form view.

Tab one	Tab two	Tab three	One more tab

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, including other tabs and accordions.



Accordions

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

Section one
Free trial 🕜 www.virtosoftware.com
Section two
The last section

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.

You are also able to define security permissions for 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 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 required field is visible, but section 2 can be hidden.

Section or		Ū				
Control pro	operties:					
Name: Section one						
Security p	operties:					
Show	to all users					
Show	to selected groups and users					
Security type:	Itide Read-only					
Allowed User Groups:						
Allowed User(s):						
Section tw	/0	ជី				
The last s	ection	ជ				

Hyperlink

You are able to add links to your SharePoint Forms.



In hyperlink properties you can define following settings:

- a link name in required format <u>http://yoursite</u>

- Label text of hyperlink

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

- Font color

Control prop	erties:	
URL:	http://www.virtosoftware.com	
Text:	www.virtosoftware.com	
Font size:	14px	•
Font weight:	Normal	•
Font style:	Normal	•
Font color:	#000000	
Security pro	perties:	
Show to	all users	
Show to	selected groups and users	
Security type:	Hide Read-only	
Allowed User Groups:		
Allowed User(s):		
		Remove

Button

With this function you can execute a JavaScript event when a button is clicked.

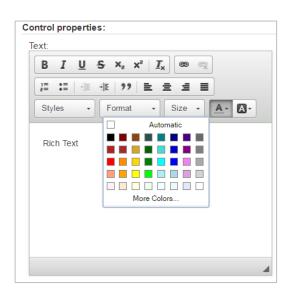


The button appearance can be also customized with css styles.

Control prop	erties:
Title:	Button
JS OnClick:	1 2 i 3 4 5
CSS class:	
CSS style:	color:red

Text

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



Image

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



Also, can add custom CSS styles to images.

Control properties:								
URL:	/Content/images/SITEICON.PNG							
CSS class:								
CSS style:								

HTML

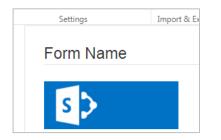
You can create in this field any interactive HTML-based controls.

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ntrol p	roper	ues.				
ltml:						
1						
2 3			Html			

Form name

You can use this field to display form name or type any other header.



White space

Use this control to add empty space to your SharePoint Form. For example, if you need to divide some fields from others.

General	Details	Links	
Title *			
VIRTO SOF	o tware		

You are able to define white space size manually.

Control properties:						
Height (px):	15					

Saving SharePoint form

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You can create SharePoint forms for following item or folder views:

- Edit form
- New form
- Display form.

Check the boxed with required views and click save to appoint a created form to chosen view. You can choose two of views if you will make them identical, or you can apply your form to all views.

In the example below, the created "Edit" form will be also applied to the "New" (create new) item form.

← 8	ack to site	Forms for Offic	2
Save	 Edit Form New Form Display Form 	Change form: (Item) Edit Form	
	General	Manage Forms	
Fields	S		
-	Eree trial		

Click "Save" to save the form views.

SharePoint form templates

You can 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.

: 365 by Virto		
🦻 A 💰 🔽		Export ×
vaScript CSS General Reset Settings	Import Export Import & Export	Name of backup file: SharePoint Forms Template
General Details	Links	
		Save Close
Download trial		
www.virtosoftware.com		

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

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	17	
	Import ×	C Open
t Import Export Import & Export	Choose File No file chosen	Organize New folder Favorites Desktop Downloads
	Save Close	Secent Places (Secent Places (Libraries Documents Music ■
		Pictures Videos Computer Local Disk (C:)
		Local Disk (D:) Local Disk (D:) File name:

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.

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It is possible to hide certain fields or tabs according to user/group permissions. If defined conditions allow a user to have access to several views, the view with highest access priority will be displayed.

For example, let's create a form for Dev department. You can start with default view and align all form controls as needed.

← Back to site	Forms for Offi											
	Change form:	Layouts:	Edit	<>	Α	ô I		B	Layout			×
Save Display Form General	(Item) Edit Form Manage Forms		Delete	JavaScript	CSS	General I	Reset In	import	Layout name:	Dev	Priority: 2	
Fields									Allowed User Groups:	Dev Members ×		
Free trial			Section	one								
Last release da	ite										Save	Close
🔳 lookup			Section	i two							Save	Close

Then click Save.

On the next step click "New" in the Layouts on ribbon 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.

← B	ack to site	Forms for Off	ice 365 b	y Virto	
	🕑 Edit Form	Change form:	Layouts:	Edit	<
	New Form	(Item) Edit Form	Default 🔻	🛅 New	1-1-1
Save	Display Form		Default	🗙 Delete	Java
	General	Manage Forms	Dev SEO	e Layouts	
Fields	Fields			1	
19-191					

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

Other settings on ribbon

Javascript editor

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

	JavaScript Editor ×	
JavaScript CSS General Reset Import Export Settings Import & Export General Details Links VIRTO SOFTWARE Download trial www.virtosoftware.com Dev	<pre>1 2 * 3 function foo(items) { var x = "All this is syntax highlighted"; 4 return x; 5 } 6</pre>	
Compability Version Release date	Save Close	

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.

A *		CSS Editor ×	
JavaScript CSS General Reset Settings General Details VIRTO SOFTWARE Download trial www.virtosoftware.com	Import Export Import & Export Links	1 2 * #body{ 3 color:black; 4 } 5	
Dev			
Compability Version		Save Close	

General settings

Virto				
1 🗳 🔽	General settings			×
SS General Reset	Hide Ribbon: Show toolbar: Line spacing:	10		
one				
wo			Save	Close

You can customize line spacing to define vertical distance between elements in your form.

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 Office 365.

365	Sites
PAGE	
👗 Cut	Delete Attach Item File Spelling
pboard	Actions Spelling
	General Details Links
	Title * Calendar Web Part
	Price 899
	Dev
365 by	SEO
jner List	Managers
ard	Attachments
r for rto -	Created at 3/23/2016 8:51 AM by Last modified at 3/23/2016 8:51 AM by Save Cancel

Edit form in SharePoint Forms for Office 365 with toolbar and hidden ribbon.

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General D	Details Links	
Title *	Calendar Web Part	
Price	899	
Dev		
SEO		
Managers		

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.

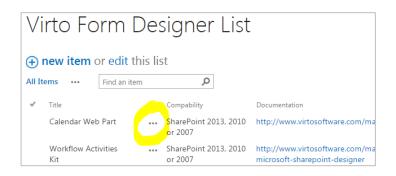
← 8	ack to site	Forms for Offi
Save	Edit FormNew FormDisplay Form	Select form for edit: Default Edit Form
	General	Parametrs

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



General Details	Links
www.virtosoftware.com	
Dev	
SEO	
Key words Documentation Free trial	sharepoint calendar, sharep http://www.virtosoftware.com
Managers	

Create form

General	Details	Links	
Title * Price			
Dev			
Compability Version Release da			12 AM • 00 •
SEO			
Managers	\$		
Created at 3/24/20 Last modified at 3		M by	Save

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Display form

Delete Item	ABC Spelling Spelling
	General Details Links
	VIRTO SOFTWARE
	Download trial vw.virtosoftware.com
	Dev
	SEO
	Managers
Att	achments . Close

This way you can organize adding information to SharePoint lists with a special form designed with Virto SharePoint Forms for Office 365.

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.

In order to check the user permission, open "Site Settings", then select "Site Permissions" under "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 sub sites.

Virtoway Team	n Site: Check Permissions		×
Check Permissions To check permissions user or group, enter t name or e-mail addre	their <u>Ekaterina Zhernosek</u> x		
		Check Now Close	
Permission levels given to	Ekaterina Zhernosek (🍂 👘 👘 👘 👘 👘 👘 👘 👘 👘		
Full Control, Limited Access	Given through the "Team Site Owners" group.		
Edit, Limited Access	Given through the "Team Site Members" group.		
Limited Access	Given through the "Style Resource Readers" group.		
Limited Access	Given through the "SharePointHome OrgLinks Viewers" group	p.	_
The following factors also	affect the level of access for Ekaterina Zhernosek (in the second state of the second state of the second state)	1
Deny Add Page	and Customize Add, change, or delete HTML pages or Web es Web site using a Microsoft SharePoint Foun		

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

"Add and Customize Pages" permission on the previous screenshot is from site level, not from list permission level. Even if you have full control in 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 new SharePoint group with this permission level. Then add yourself into the SharePoint group to get the "Add and Customize Pages" permission.

You must have enabled Custom Scripting in SharePoint admin center. Go to SharePoint admin center> Settings> Custom Script.

Custom Script	Prevent users from running custom script on personal sites
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.	Allow users to run custom script on personal sites
sites. Note: changes to this setting might take up to 24 hours to take effect.	Prevent users from running custom script on self-service created sites
For more information, see http://go.microsoft.com/fwlink/?LinkId=397546	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.