VIRTO SOFTWARE

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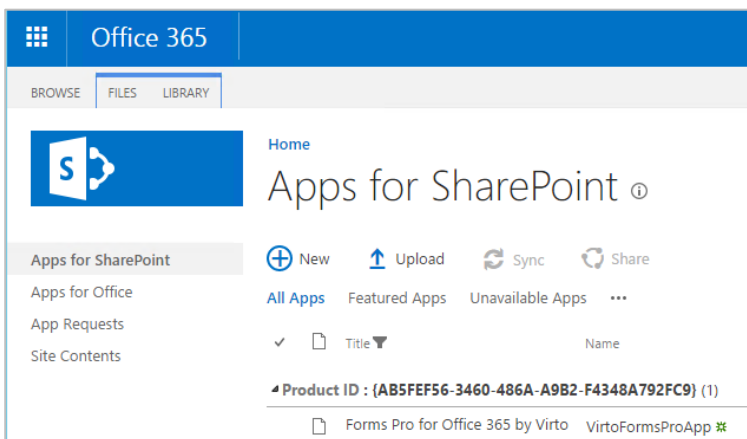
3) Go to the site where you will add Forms Pro for Office 365.

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.

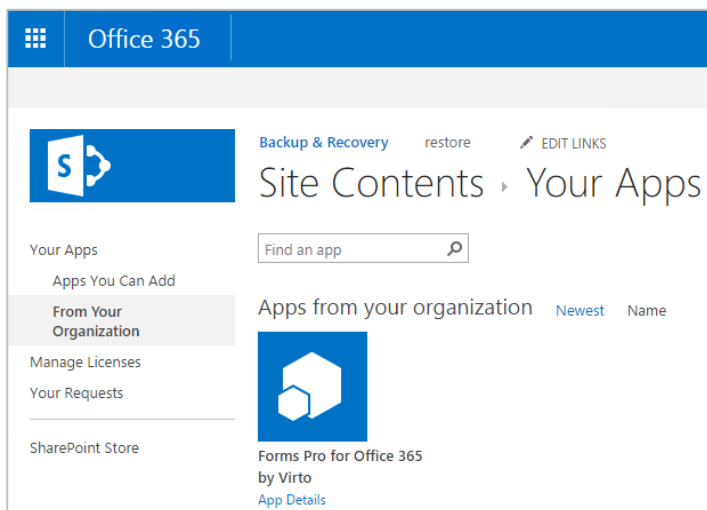5) After that Virto Forms icon will be added on the Ribbon pane, so you can launch it directly from your Lists or Document Libraries. Or you can launch it from Site Contents on Site Collection where you've installed Forms Pro App.
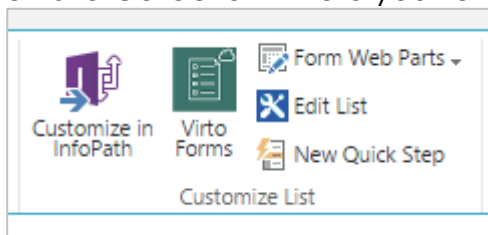
6) Now you are ready to create beautiful custom forms in your SharePoint!

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

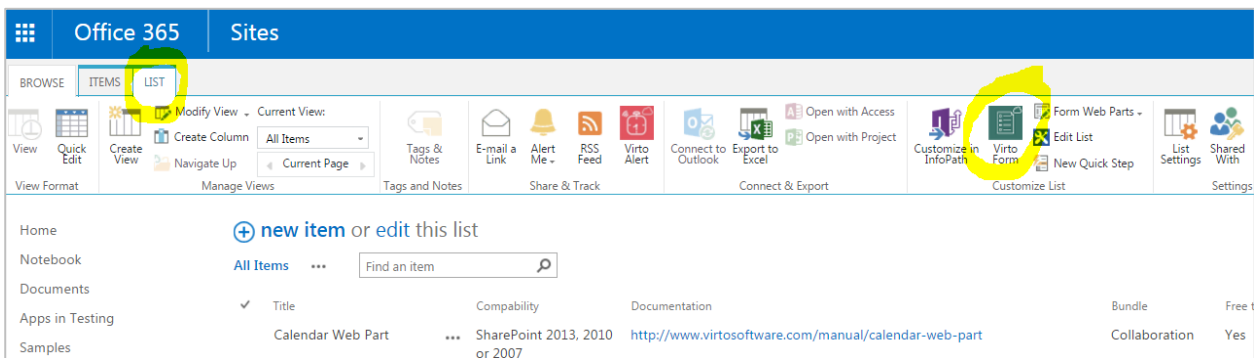Go to a required list in your SharePoint and switch to "Library" or "List" tab. Click on Forms Designer icon on the ribbon. SharePoint Forms for Office 365 will be opened in the new window.

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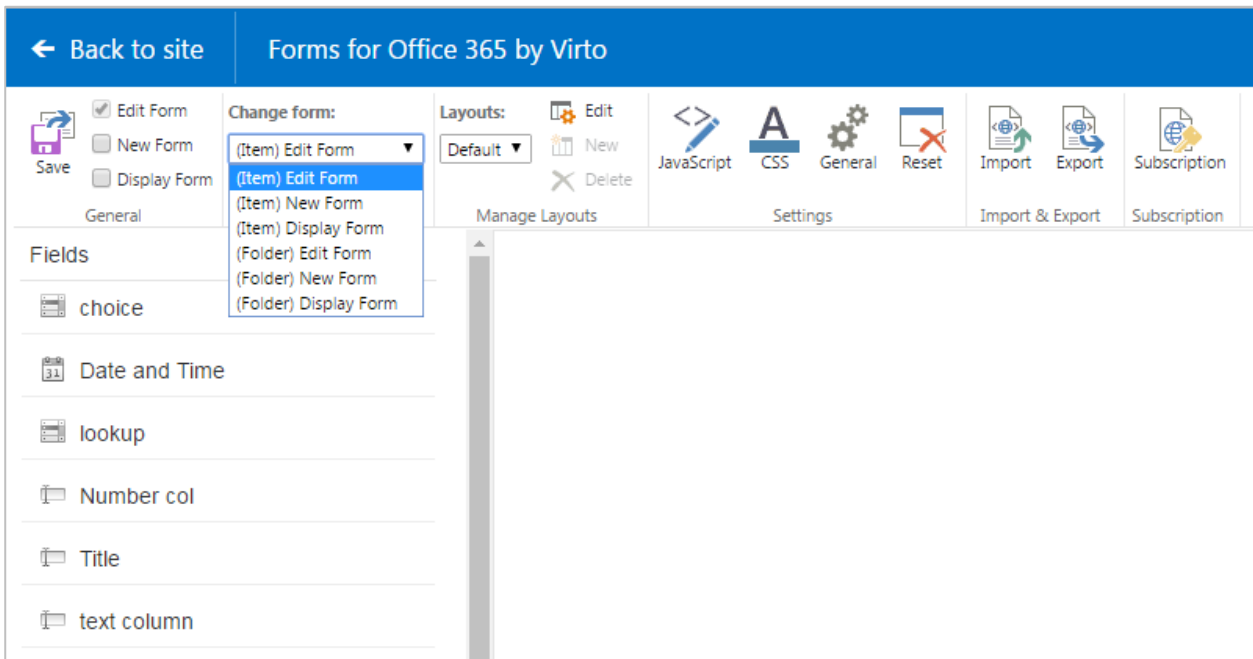
As an example, you can open edit form to start creating a new form for list items editing. Actually, you can use any other form view to start working with Virto SharePoint Forms for Office 365.

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

Basic controls for SharePoint form creating are located below.
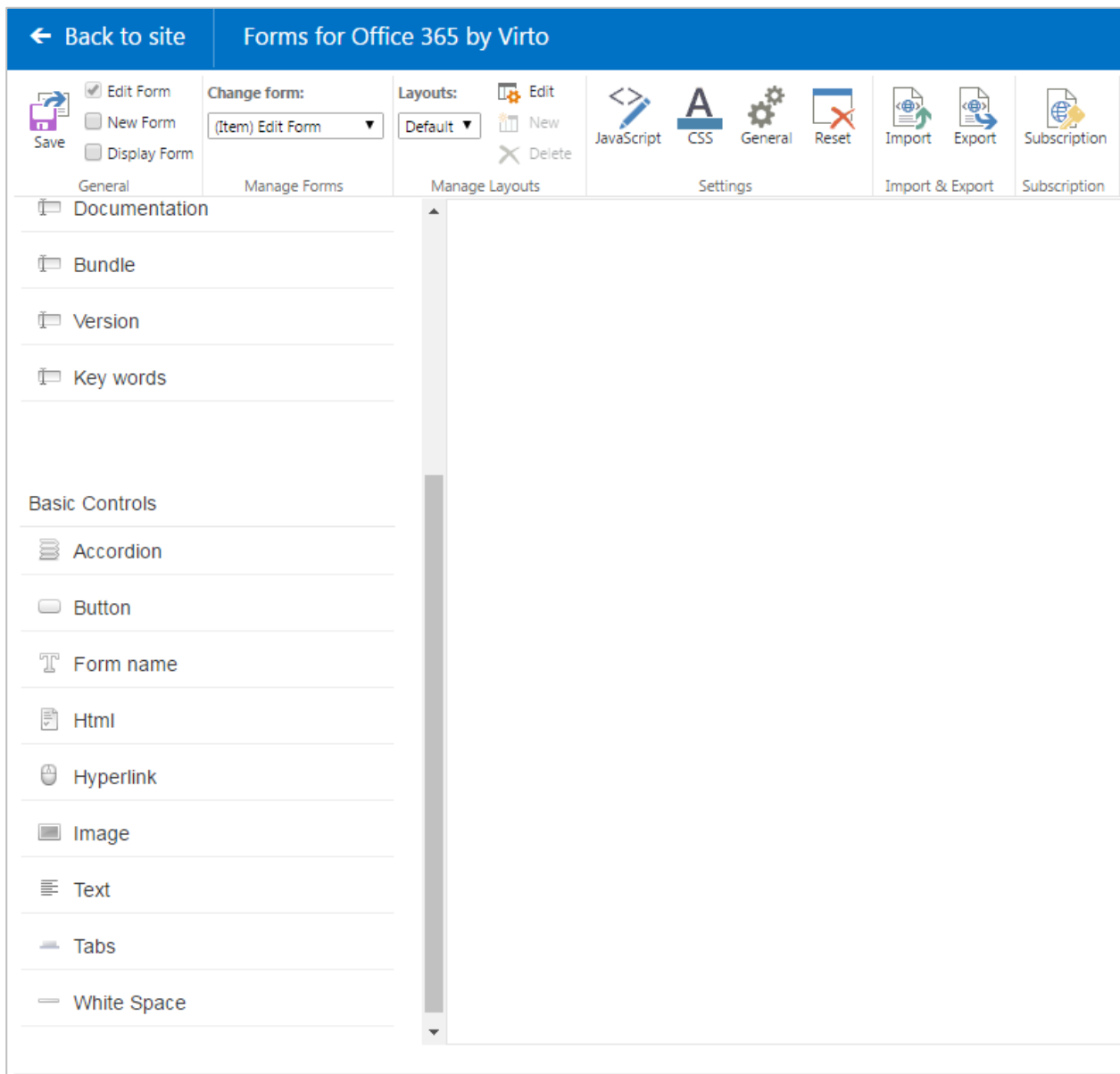
Now you can design a SharePoint form, using drag and drop function. New section will appear on the form.

Fields

　　Text

　　Documentation

　　Bundle

　　Free trial

　　Key words

　　Price

　　Version

　　Last release date

　　Lookup

Basic Controls

　　Tabs

　　Accordion

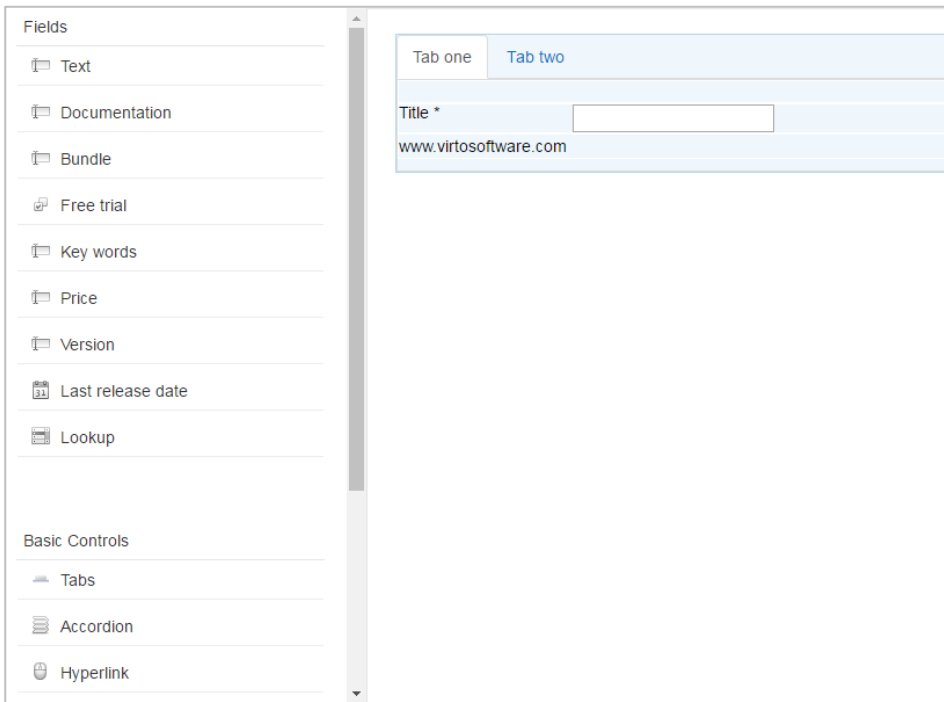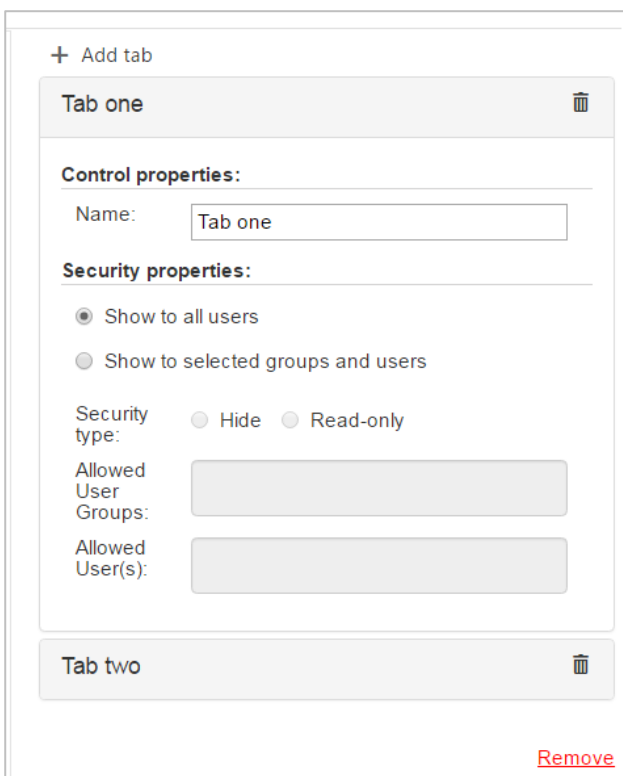　　Hyperlink

Tab one	Tab two

Title *

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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.

+ Add tab

Tab one　　🗑

Control properties:

Name: Tab one

Security properties:

⦿ Show to all users

◯ Show to selected groups and users

Security type: ◯ Hide   ◯ Read-only

Allowed User Groups:

Allowed User(s):

Tab two　　🗑

Remove

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 ▼
Font style:	Normal ▼
Font color:	#000000 ■
Visibility:	✔

Control properties:

Size:	230

Remove

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 *

Tab one   Tab two

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

Tab one   Tab two

Title *

+ Add tab

Tab one   🗑

Control properties:

Name: Tab one

Tab two   🗑

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.

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 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.
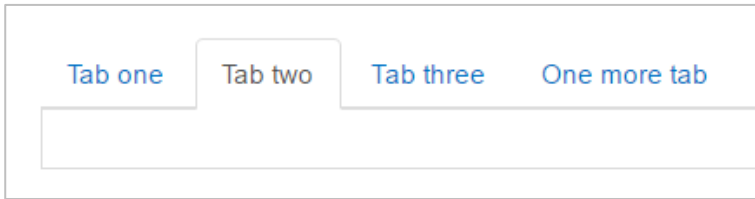
You can add more tabs by clicking "+ Add tab" button and type tab names in the control properties in the right corner. Remove the tab by clicking delete icon on the end of a chosen tab row. Delete all tabs by clicking on red "Remove" link.

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.

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.

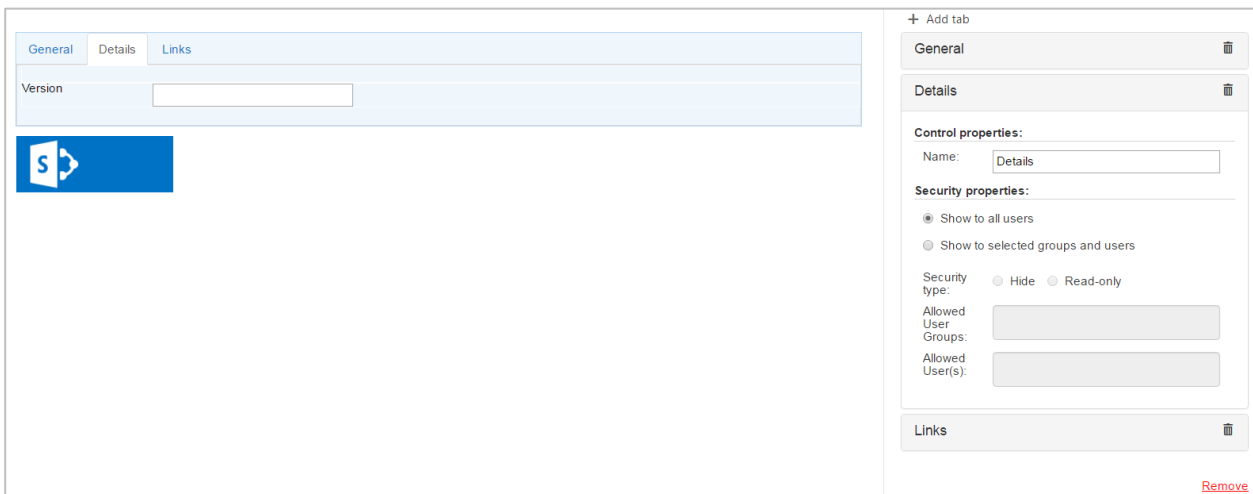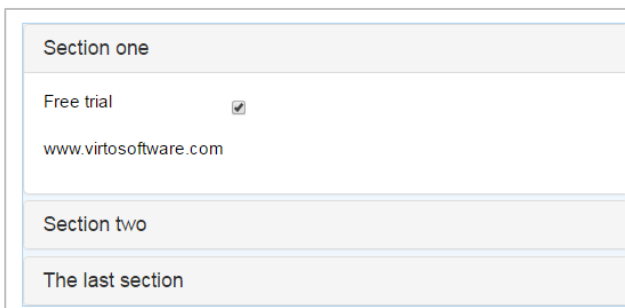You are also able to define security permissions for accordion sections.

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.*

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 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 when a button is clicked.
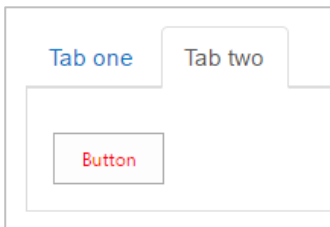
The button appearance can be also customized with css styles.

Text

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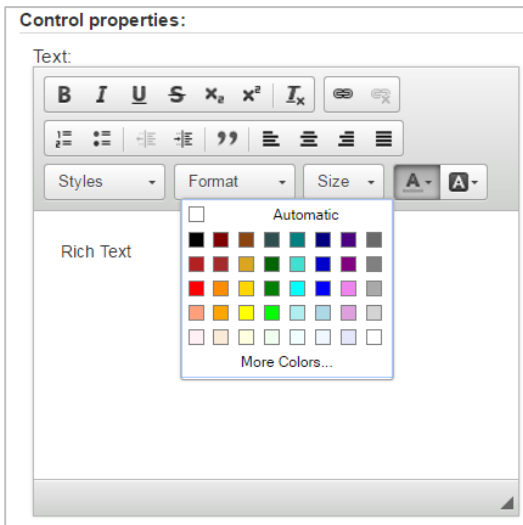
Image

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.

HTML

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

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.
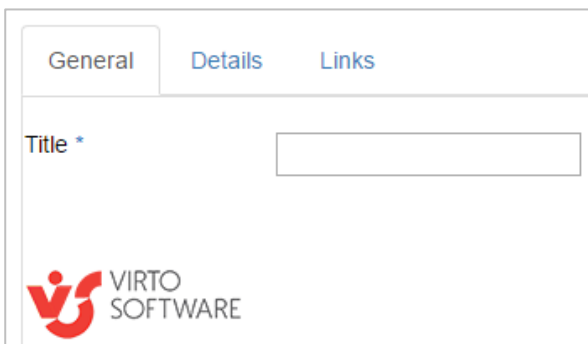
You are able to define white space size manually.

Saving SharePoint form

You can create SharePoint forms for following item or folder views:
- Edit form
- New form
- Display form.
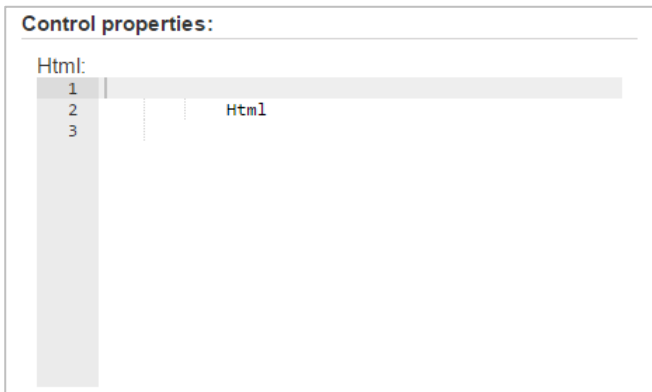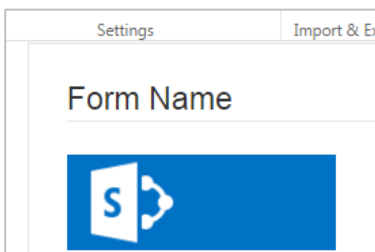
Check the boxed with required views and click save to appoint a created form to chosen view. You can choose two of views if you will make them identical, or you can apply your form to all views.

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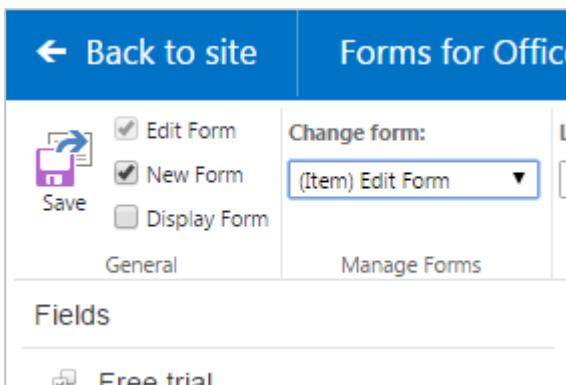
Click "Save" to save the form views.

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.

Choose "Import" button to apply saved form to a new 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.
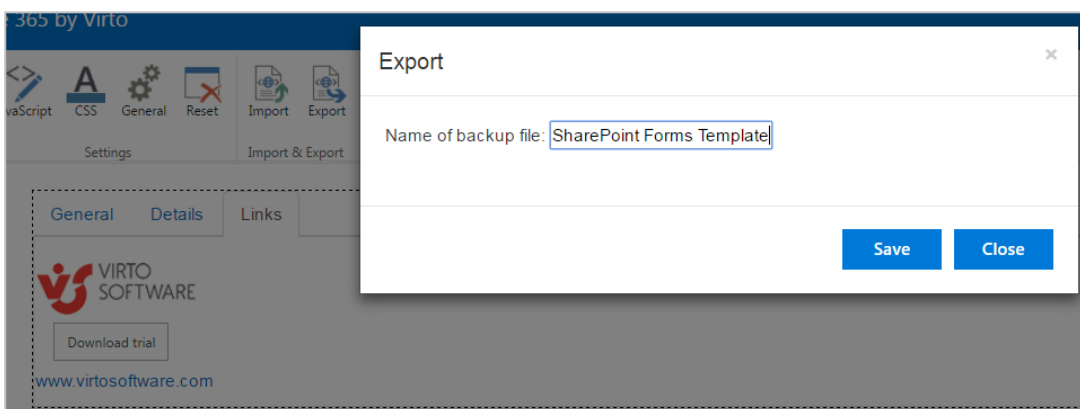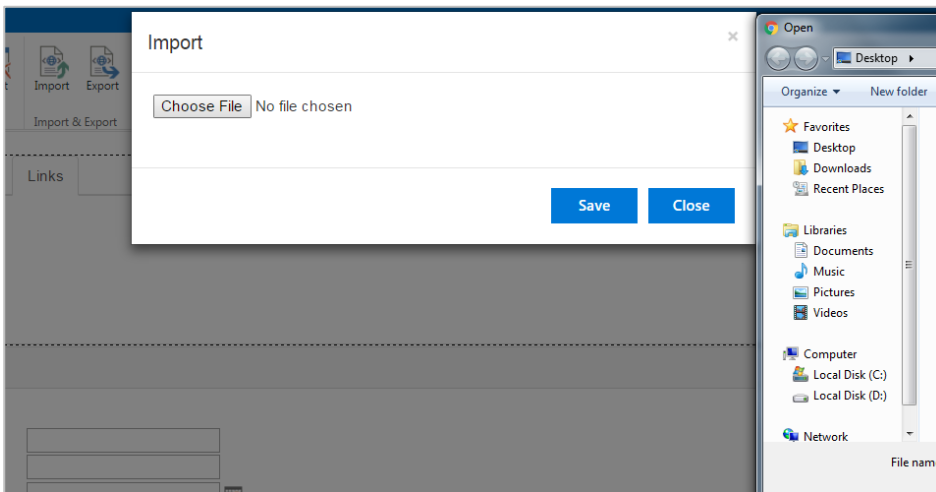
It is possible to hide certain fields or tabs according to user/group permissions. If defined conditions allow a user to have access to several views, the view with highest access priority will be displayed.
For example, let`s create a form for Dev department. You can start with default view and align all form controls as needed.
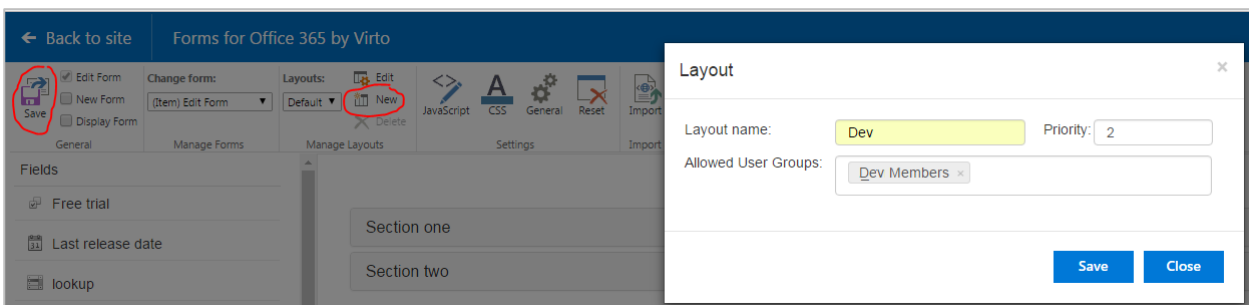
Then click Save.

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.

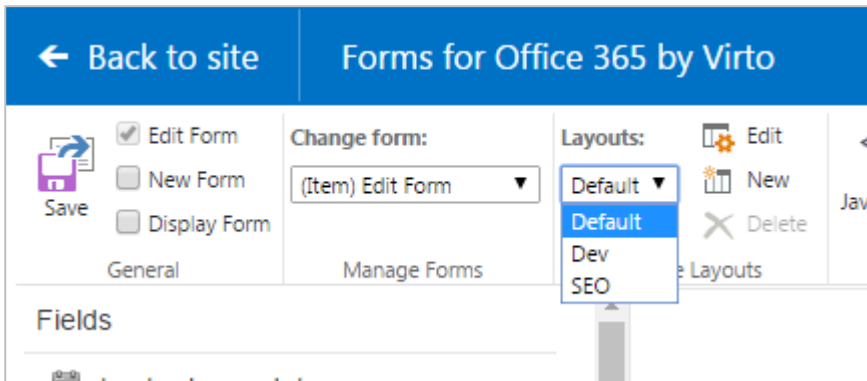Now you can edit several layouts in SharePoint Forms Designer.

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.
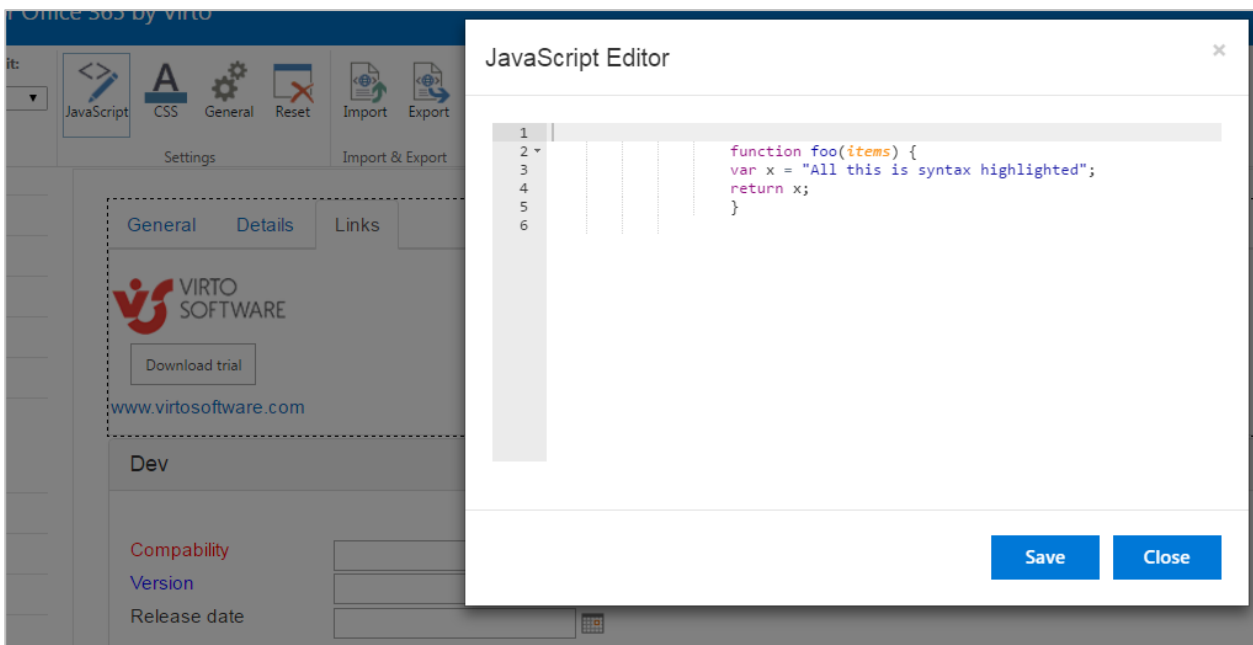
Css editor

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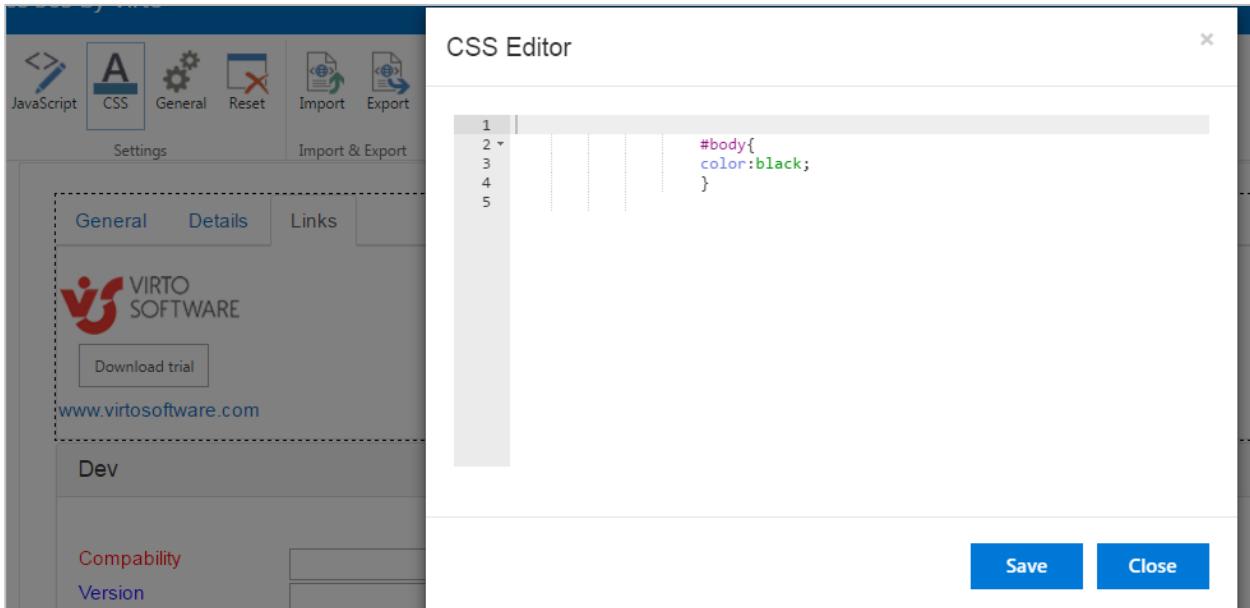
General settings
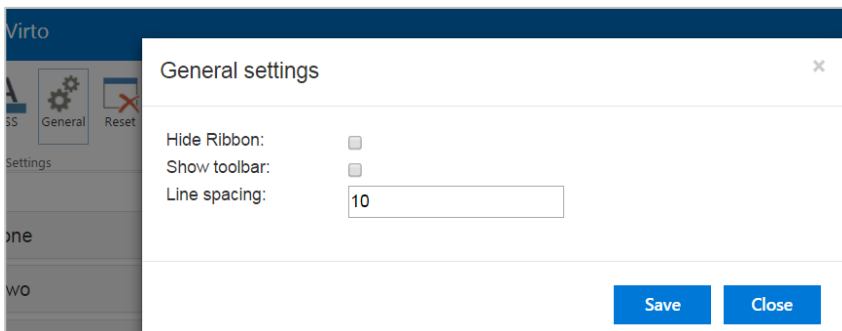
You can customize line spacing to define vertical distance between elements in your form.

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.

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

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.
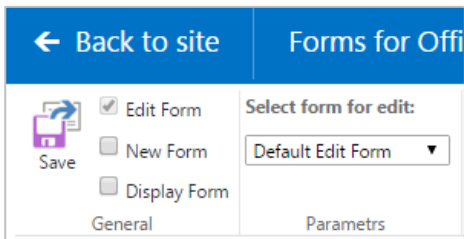
Using Designed Form on a SharePoint Site

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
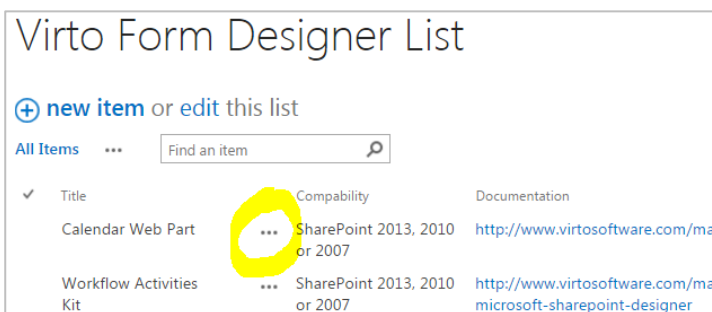
General   Details   Links

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Dev

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Key words   sharepoint calendar, sharep

Documentation   http://www.virtosoftware.com

Free trial   ☑

Managers

Attachments

Save   Cancel

Create form

General   Details   Links

Title *

Price

Dev

Compability

Version

Release date   📅 12 AM ▾ 00 ▾

SEO

Managers

Created at 3/24/2016 11:42 PM by
Last modified at 3/24/2016 11:42 PM by

Save   Cancel

Display form

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 Site: Check Permissions ✕

Check Permissions

To check permissions for a user or group, enter their name or e-mail address.

User/Group:

Ekaterina Zhernosek 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.

The following factors also affect the level of access for Ekaterina Zhernosek (   )

| Deny | Add and Customize Pages | Add, change, or delete HTML pages or Web Part Pages, and edit the Web site using a Microsoft SharePoint Foundation-compatible editor. |

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

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.