# Lightning Forms

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Lightning Tools

## **Table of Contents**

| 1. Introduction                     | 2    |
|-------------------------------------|------|
| 1.1. Deploying Lightning Forms      | 5    |
| 1.2. Licensing                      | 9    |
| 1.3. App Home Page                  | . 11 |
| 1.4. Start Customizing Form         | . 13 |
| 2. Form Editor                      | . 16 |
| 2.1. Rich Forms Tab                 | . 18 |
| 2.1.1. Tabs                         | . 29 |
| 2.1.2. Lock Contents                | . 30 |
| 2.1.3. Toolbars                     | . 31 |
| 2.1.4. Rich Text Box                | . 32 |
| 2.1.5. Insert Fields                | . 33 |
| 2.1.6. Insert Sub List              | . 35 |
| 2.1.6.1. Sublist Column Calculation | . 37 |
| 2.1.6.2. Aggregation over Sublists  | . 39 |
| 2.1.7. Insert Sublibrary            | . 41 |
| 2.2. Behavior Tab                   | . 43 |
| 2.2.1. Expressions                  | . 47 |
| 2.2.1.1. Expression Examples        | . 49 |
| 2.2.1.2. Expression Builder         | . 51 |
| 2.3. Actions Builder                | . 53 |
| 2.3.1. Add List Item                | . 55 |
| 2.3.2. Delete List Item             | . 57 |
| 2.3.3. Execute Script               | . 59 |
| 2.3.4. HTTP Request                 | . 60 |
| 2.3.5. Open List Form               | . 62 |
| 2.3.6. Open Web Page                | . 64 |
| 2.3.7. Redirect to URL              | . 66 |
| 2.3.8. Reload Page                  | . 68 |
| 2.3.9. Save Form                    | . 69 |
| 2.3.10. Send Mail                   | . 70 |
| 2.3.11. Show Message                | . 72 |
| 2.3.12. Start Workflow              | . 74 |
| 2.3.13. Update List Item            | . 76 |
| 2.4. Lookup Filtering               | . 78 |
| 2.5. Query Editor                   | . 80 |

|                 | 2.6. Embed List Form App Part | 81 |
|-----------------|-------------------------------|----|
| 3. <sup>-</sup> | Tutorials                     | 89 |

## 1. Introduction

## **Lightning Forms**

Lightning Forms is an app for SharePoint that provides an easy to use, yet powerful editor to customize list forms.

Building forms in SharePoint and Office 365 that look great and fulfil all the different purposes of your forms has never been easier!

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## **Deploy easily**

Lightning Forms is a SharePoint app that extends SharePoint's content editor. No need to use any separate tools or go to an external site. All form editing can be done seamlessly in your browser on your SharePoint site.

### Place form fields freely

Place your fields anywhere on the form using easy drag-and-drop or ribbon interface. Start out with the form layout as provided by SharePoint and then reposition fields, align field labels or change the label text where needed.

### Group vertically, horizontally or in tabs

Easily group fields and other elements in vertical/horizontal groups or tabs. Flexibly combine different group types to create the layout you want. You can even embed groups inside other groups, allowing for even the most complex layouts.

### **Rich text editing**

Use all the powerful features of SharePoint's content editor web part to add freely formatted text, tables, images, embedded scripts and media using the familiar Office ribbon-interface. And if the user-friendly editor is not enough for you, you can always resort to editing the HTML source to make almost anything a browser can handle possible.

## Edit sub items in a grid

Place a sub list on your form for any related SharePoint list. Thus users can fill out multiple entries quickly with SharePoint's familiar editable grid view. Lightning Forms will ensure that the items are saved with the form's other data. And it works even on new forms, so your users can fill out forms quickly even if multiple sub items need to be entered.

## Handle complex business logic

Implement even complex business logic using Lightning Forms' flexibly configurable, expression-based behaviours. Make a field or form section dynamically show or hide or become enabled or disabled

depending on other inputs. Set default values and even recalculate them while the user is entering data in the form.

#### Act on data

There is more to data then editing and storing. Users want more than just viewing data they entered. Lightning Forms let's users act on data, making data do more. Build completely new functionality using the freely configurable actions provided in Lightning Forms. Sending mail, adding or changing other list items, redirecting to a web page and much more can easily be done and can even be based on form data using highly flexible expressions.

#### Define complex validation rules easily

Use expression-based validation rules to specify required form input. These can even handle changes to entered data. For example: Make the entry of a reason required depending on the status selected.

### Embed any web part on your form

Using Lightning Forms you can embed any web part inside your form. For example display all related lists and libraries right inside your display form.

#### **Revert to older versions**

Whenever you need to go back to an older version of your form, rest assured Lightning Forms editor will automatically keep old versions and let you restore them easily.

### See the result while designing

Being able to see what the result will look like makes creating beautiful forms easy. No need to configure where you want your fields in an abstract editor. Immediately get feedback on how things look using the powerful drag-and-drop and ribbon interface provided by Lightning Forms WYSWYG editor.

## Seamlessly integrated in SharePoint

Because Lightning Forms only extends SharePoint's list forms and uses all out-of-the-box functionalities, the forms work and act as part of SharePoint and users are immediately familiar with them.

Site contents

## 1.1. Deploying Lightning Forms

Lightning Forms can be deployed to SharePoint On-Premises (2013 onwards) or SharePoint Online via the App Catalog. Once the App has been made available in the App Catalog, users can deploy the App within their SharePoint Team Sites, and begin to customize the forms.

| *      | To familiarize<br>by Microsoft <u>h</u> | yourself with the SharePoint App Catalog, please refer to the steps indicated<br>here. |
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## Adding Lightning Forms to a SharePoint Site

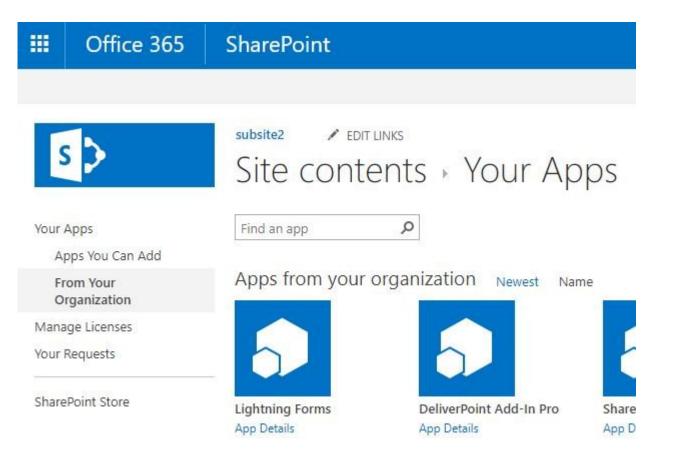
Once the Lightning Forms app is added to the SharePoint App Catalog, Users will be able to add Lightning Forms to their sites following these steps:

- 1. Navigate to the site where you would like to add Lightning Forms.
- 2. Click the Site Actions Cog in the top right hand corner of your site, and then choose Add an app.

| Edit page       | ? Lightning Tools Ad 🥠 |
|-----------------|------------------------|
| Add a page      | Ç SHARE ☆ FOLLOW [□]   |
| Add an app      |                        |
| Site contents   |                        |
| Change the look |                        |
| Site settings   |                        |
| Getting started |                        |

#### Add an app

- 1. From the left hand navigation pane under Your Apps, click **From Your Organization**.
- 2. Click the Lightning Forms tile to add Lightning Forms



#### Adding Lightning Forms

1. When prompted, choose **Trust It** from the Do you trust Lightning Forms? dialog.

| Do you trust Lightning Forms?                                 |              | ×      |
|---|--------------|--------|
| Let it have full control of this site.                        |              |        |
| Let it access basic information about the users of this site. | Lightning Fo | rms    |
| SHOW LANGUAGE OPTIONS   |              |        |
|   | Trust It     | Cancel |
|   | - LI         | ·      |

#### Trust Lightning Forms

Lightning Forms will now successfully be added to your SharePoint site.

<< 1. Introduction</p>
1.2. Licensing >>

## 1.2. Licensing

After installing Lightning Forms it is required to have a valid license file. A license file can be requested in order to trial Lightning Forms. This file can be requested by the license request form on the app homepage.

| LightningTögls  |  |  |
|---|--|--|
| ☑ Lightning Forms   |  |  |
| About this App<br>Customize your forms and reate<br>business solutions using the powerful<br>designer Lightning forms.<br>Version   Language: English<br>License<br>Support<br>Peel free to contact us by submitting a ticket.<br>Submit a Ticket | You have no valid license file  Request License  Please click on this button to request a new locense file, You can purchase a new locense file, or request a fully functional 30 days trial license.  If you already have a valid license file, please click this button to uplead if here.   | Instructions & Support   Community Learn more about Lightning Forms through our community ales.    F Feerbook  Twitter  Newsletter |
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By clicking on Request License a request form will open where you have to fill in some information and click send.

After requesting the license you receive a license file from us that you can upload by clicking on upload license.

The license is placed into the hidden document library called FormsStoreLibrary in the folder Licenses

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## **1.3. App Home Page**

#### 1. Forms List

In the list overview you can directly customize a form by selecting the appropriate form's icon under the New, Display and Edit headings. Alternatively the Select Form to Customize button provides a window to select the list and form to customize. Select Recent, All, Lists and Libraries to change which lists and libraries are shown or use the Find a list search box to filter the lists displayed.

| Configure Lightning Forms Recent All Lists Libraries |     |         |      |              |
|--|-----|---------|------|--------------|
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| SHOW MORE  |     |         |      |              |
|  |     |         |      |              |
|  |     |         |      |              |
| Customize Form                                       |     |         |      |              |

From the Application Page, you can Submit a Support Ticket to our Support Portal, Link to the documentation, join our Social Community, and view other accelerators from Lightning Tools.

| ightning Forms<br>D Lightning Forms  | Configure Lightning Forms     |                       | Instructions & Support   |
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| Customize your forms and create<br>business solutions using the powerful             | Recent All Lists Libraries D  |                       | Cocumentation  |
| designer Lightning Forms.<br>Version   Language: English<br>License<br>Release Notes | List Neme<br>FB_App Rackages  | New Disjoy foll More. | Community<br>Learn more about Lightning Forms through our communit<br>sites. |
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|  | SHOW MORE                     |                       |  |
|  | Customize Form                |                       |  |
|  | Customice Form.,              |                       |  |

## **1.4. Start Customizing Form**

You can start customizing a form by opening it in design mode process in 3 ways:

#### 1. From the Main App Page

| Co  | onfigure Lightning Forms   |     |         |      |      |
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| 8   | Site Pages                 |     | Ēđ      | B    |      |
|     |                            |     |         |      |      |
|     | Customize Form             |     |         |      |      |

Specify a list and select the form you want to customize. For more information, see Main App Page.

#### 2. From the List View Page

Select the Customize Rich Forms option on the List View ribbon.

| All contacts *  | Taos 8            |                                      | Open with Access                                |                             | 🔀 Form Web Parts 🗸  |   |
|-----------------|-------------------|--------------------------------------|---|-----------------------------|---|---|
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Customizing Lightning Forms

#### 3. From the Form Page

Click Edit Page action in the Settings menu of the form page.

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|                                  | Business Phone       | [Business Phone] | *************************************** |   |                 |                                  |    |                      |    |

Note: This will only allow further customizing the form using Lightning Forms features if the form has previously been customized by one of the other above ways.

After you perform one of the above actions, the form is opened in design mode and you can start customization using the Lightning Forms Editor features:

Field Group Tabs Toolbar Rich Text Box

<< 1.3. App Home Page 2. Form Editor >>

## 2. Form Editor

The main form editor features are organized into a series of tabs on the editor ribbon. Once you open your form in design mode, 2 additional tabs will appear after standard SharePoint tabs.

- Controls for adding, editing, and customizing content are prominently displayed on Rich Forms tab.
- Expression-based behaviours for configuring complex business logic are available on Behaviour tab.

#### **Drag and Drop**

The Form Editor uses a drag and drop interface. Items can be dragged and dropped to reposition them. When dragging an item, move it over the edge of an existing item. A border line will appear indicating the position where it will be inserted. You can drag and drop one item, as well as a group with multiple items in it.

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|                            |                                  |            |  |                |   |   |             |   |   |               |

Move your mouse over an item on your form. When the item becomes highlighted, press your left mouse button and drag the placeholder over an existing form item. Position the item so that border line appear to indicate that the position is valid. Release the mouse button.

For already selected items there is a Move selected element icon at the left side. When you click on it the cursor changes to the drop one until you release the left mouse button.

## Grippers

Grippers are those small icons that appear when you select an element inside the Forms Editor.

| 1 | 🕂 Rich Forms Ed | ditor - Contacts |
|---|-----------------|------------------|
| 2 | 🖽 Last Name *   | Last Name]       |
| 1 | First Name      | [First Name]     |

1. Move selected element

Is used to move items: items can be dragged and dropped to reposition them. When you click on it the cursor changes to the drop one until you release the left mouse button.

#### 2. Select surrounding group

Opens context menu with surrounding groups and allows to select the needed element without using a Select Element button on the Rich Forms ribbon.

| Rich Forms Edi    | tor - Contacts | - 🗸 |
|-------------------|----------------|-----|
| Group with heade  |                | •   |
| Horizontal Group  |                |     |
| Vertical Group    | D              |     |
| Group with Header |                |     |
| Main              | [First Name]   |     |
| Full Name         | [Full Name]    |     |

Group with Header

3. Revert to default label

Gripper that becomes available when label is selected. If some changes were performed on the label, clicking on it will revert to the default label state.

## 2.1. Rich Forms Tab

### **Rich Forms Ribbon Tab Features**

Rich Forms tab contains controls for adding, editing, and customizing content of the form. Once you open your form in design mode, it will appear after standard SharePoint tabs.

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| Apps in Testing  |                 | Add a Web Part  |  |  |
| Samples<br>Developer Center  | + Rich Forms Ed |   |  |  |
| Recent   | Last Name *     | [Last Name]   |  |  |
| skybow Rich Forms Pro<br>skybow Theme Designer   | First Name      | [First Name]  | G  |  |
| Contacts   | Full Name       | [Full Name]   |  |  |
| skybow List View Search  | Email Address   | [Email Address]   |  |  |

#### **Rich Forms Tab**

### 1. Reset to Version

Reset to Version action provides the ability to reset the form content to any saved version.

Whenever you need to go back to an older version of your form, rest assured Lightning Forms editor will automatically keep old versions and let you restore them easily.

### 2. Reset to Default

Reset Form action resets the form content to the initial form template.

### 3. Uncustomize Form

**Uncustomize Form** action removes Lightning Forms customization of the current form and reverts to the standard SharePoint form.

4. Field

Field is a custom action in the ribbon toolbar to add fields into the content editor web part. It allows to add any field available for the current form.

It also provides an ability to add new fields directly from the current page: clicking Add New button initiates opening of Create Column dialog. New field is immediately added to the form.

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| М   | ain              | Inser      |                            |          | e form editor. | 19       |  |
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|     | First Name       | 10/2010    | Number<br>t Name           |          |                |          |  |

## 5. Group

Group is a custom action in the ribbon toolbar to add groups into the content editor web part.

Since positioning of fields is essential for designing your forms to match the structure of the data represented, Lightning Forms provides Groups functionality that allows to manipulate form field positions, flexibly combine different group types to create the layout you want. You can even embed groups inside other groups, allowing for even the most complex layouts.

There are 3 available group types: vertical, horizontal and group with header.

| Grou  | p Table                                       | Tabs  | Toolbar Rich Text |  |
|-------|---|-------|-------------------|--|
| [9] } | Vertical Grou<br>Horizontal G<br>Group with I | iroup | Insert            |  |

#### Lightning Forms Group

Vertical group allows to place form fields in vertical stack one below another.

| First Name     | [First Name] |  |
|----------------|--------------|--|
| Last Name *    | [Last Name]  |  |
| Vertical Group | [Full Name]  |  |
| Main           |              |  |

#### Vertical Group

Horizontal group allows to place form fields in horizontal stack one after another.

| Rich Forms Ed    | itor - Contacts |             | - 🗸 |
|------------------|-----------------|-------------|-----|
| Horizontal Group | ]               | Last Name * |     |
| Main             |                 |             |     |

**Group with header** allows to place form fields in vertical stack one below another and to display a header for it. Group with header follows the layout rules of vertical group. There is a setting on the ribbon to define if it will be collapsible: **Collapsible** checkbox allows to specify if an icon should appear to collapse/expand the content of this group.

| Name              |               | Ŧ |
|-------------------|---------------|---|
| Last Name *       | [Last Name]   |   |
| First Name        | [First Name]  |   |
| Gull Name         | E [Full Name] | c |
| Group with Header | d             | E |

#### Group with Header

#### 6. Table

**Table** is a custom action in the ribbon toolbar to add table layout into the content editor web part. Table layout allows placing fields or other elements in a familiar table grid even more easily and user-friendly. Making designing your forms as you want even faster.

Table can be inserted by selecting the needed number of rows and columns. When table is inserted, the additional ribbon tab appears with standard table options.

| Table     |                                |                 |  |   |         |
|-----------|--------------------------------|-----------------|--|---|---------|
| 4x3 Table |                                |                 |  |   |         |
|           |                                |                 |  |   |         |
|           | _                              |                 |  |   |         |
|           | PAGE FOR                       | MAT TEXT INSERT | INSERT WEB PART                              | RICH FORMS BEHAVIOUR                    | R TABLE |
|           |                                |                 |  |   |         |
|           |                                |                 |  |   |         |
|           | Merge Split<br>Cells - Cells - |                 | sert Insert Delete<br>eft Right <del>,</del> | Show Table Align Table<br>Border Cell + |         |
|           | Merge                          | Rows &          |  | Layout                                  |         |

#### Table

| Aain                         | Main           |                              |            |              |           |             |  |  |
|------------------------------|----------------|------------------------------|------------|--------------|-----------|-------------|--|--|
| Add a Web Part               |                |                              | Add        | a Web Part   |           |             |  |  |
| Rich Forms Editor - Contacts | Rich Forms Ec  | Rich Forms Editor - Contacts |            |              |           |             |  |  |
|                              | di Last Name * | [Last Name]                  | First Name | [First Name] | Full Name | [Full Name] |  |  |
| Last Name * [Last Name]      | Email Address  | [Email Address]              | Company    | [Company]    | Job Title | [Job Title] |  |  |
| First Name [First Name]      | Business Phone | [Business Phone]             |            |              |           |             |  |  |

#### Table Layout

#### 7. Tabs

Tabs is a custom action in the ribbon toolbar to add tabs into the content editor web part.

Tabs are styled by default to fit well for forms in SharePoint 2013 look, therefore they appear natural in your forms design. This group is very handy to use: tabs can be easily reordered, fields are moved to the tabs by simple drag & dropping. Each tab follows the layout rules of vertical group.

| Name × Adre | ss 🗙 Phone 🗙 🕀 |            |
|-------------|----------------|------------|
| Full Name   | [Full Name]    |            |
| First Name  | [First Name]   |            |
| Tabs        | [Last Name]    | :<br> <br> |
| Main        |                |            |

Tabs

## 8. Toolbar

**Toolbar** is a custom action in the ribbon toolbar to add the form toolbar into the content editor web part. You can manage buttons separately in ungrouped toolbar.



Toolbar

### 9. Rich Text Box

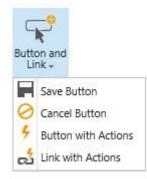
**Rich Text Box** is a custom action in the ribbon toolbar to add rich text box into the form. Rich Text Box is generally used for displaying, entering and manipulating text with formatting. Now your form can be extended with the freely editable text, hyperlinks, tables or media. Fields are moved to the editable area by simple drag & dropping.

| AC20071 #210-00047555-00050 |                |
|-----------------------------|----------------|
| ditor - Contacts            |                |
| the form below              |                |
|                             |                |
|                             |                |
|                             |                |
|                             |                |
|                             |                |
|                             | the form below |

Rich Text Box

### **10. Button and Link**

Button is a custom action in the ribbon toolbar to add the different buttons into the content editor web part. Actions executed on buttons click can be configured in Actions section of Behaviour tab.



#### Button and Link

### 11. Insert Sublist

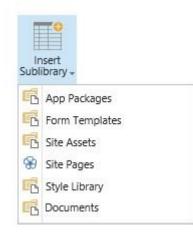
Related list view can be inserted as editable grid on new and edit form, and as non-editable grid – on display form. Available sub lists are displayed as the options of Insert sub list custom action in the ribbon toolbar. Related items are displayed based on the lookup column in the inserted list or document library.

| t sub<br>t +     |
|------------------|
| Company Projects |

#### Insert Sublist

### 12. Insert Sublibrary

Insert Sublibrary allows providing a document library view with folders and drag and drop functionality anywhere inside your form. The sub library is editable and can be used on display and edit forms. Available sublibraries are displayed as the options of Insert Sublibrary custom action in the ribbon toolbar.





#### 13. Reordering and delete actions

Lightning Forms provides an easy way of moving and deleting any UI element on the form. The following options on the ribbon allows to move a form field, as well as remove it in the design mode.



**Reordering and Deleting Actions** 

p(banner tip).Note: In a horizontal group Move Up moves element to the left and Move Down to the right.

#### 14. Select Element

Select Element option provides a drop-down list of all elements on the form. Selecting the option in the drop-down highlights the corresponding element on the form.

| Main                 |
|----------------------|
| Group with Header    |
| Field Row(Last Name) |
| Vertical Group       |
| Toolbar              |

Select Element

### **15. Lock Contents**

Rich Forms editor provides ability to lock / unlock grouped contents. This can be done by clicking one of the options under Lock Contents section. Lock action locks the selected element content: disables editing ability.

Field row is a horizontal group of field label and vertical group of field input and field description. Field row unlocking allows to manage its elements (field label, field input, field description) independently.

|    | 17 |        | ++    | k Contents 🗸                  |          |
|----|----|--------|-------|-------------------------------|----------|
| Na |    | Name * | 正 ast | ck Contents<br>nlock Contents | 2.4      |
| Va |    | Name * | 语具ast |                               | Lo<br>Lo |

Lock Contents

## 16. Show grid lines

Show grid lines is a custom action in the ribbon toolbar to show/hide grid lines in the design display mode. It is turned on by default.

| Rich Forms I   | ditor - Contacts |   |
|----------------|------------------|---|
| Group with hea | der              | ▼ |
| Last Name *    | [Last Name]      |   |
| New tab 🗙 ᠂ 🕀  | 6                |   |
|                |                  |   |
| First Name     | [First Name]     |   |

Show Grid Lines

#### 17. Label

Label is a custom action in the ribbon toolbar to align field labels into the content editor web part. In addition to simple editing of field label text and label resizing, labels also can be placed in different positions: to the left / to the right of the field, at the top / at the bottom of the field. Setting **Align Default** specifies alignment of the field label according to the context of the field row:

**Horizontal / Vertical group**: align setting applied to the horizontal group determines alignment of nested elements (field rows, groups, tabs).



Any non-default alignment setting overrides the default one.

| 3          | Label +       |
|------------|---------------|
| Alig       | ment          |
|            | Align Default |
| <b>a</b> = | Align Left    |
| -3         | Align Right   |
| a          | Align Top     |
| а          | Align Bottom  |
| Disp       | lay           |
| a×         | Hide          |
| -          | Show          |



### 18. Only Display

Only Display action is used to set the selected form field to only display mode, so it cannot be edited. It is useful on Edit form to have some field values in read only mode.

| Rich Forms | Editor - Contacts | - 🗸 |
|------------|-------------------|-----|
| First Name | [First Name]      |     |
| First Name | [First Name]      |     |

Only Display

## 19. Collapsible

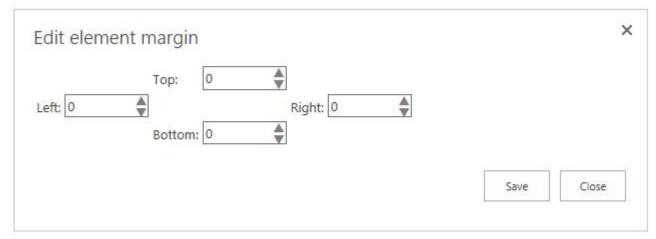
Collapsible checkbox allows to defines if Group with header will be collapsible: if an icon should appear to collapse/expand the content of this group.

### 20. Height, Width

Formatting actions allows to set height and width of the element, as well as of the group of elements.

## 21. Margin, Padding

Margin and Padding values can be set in more visual way using the Edit dialog.



Margin, Padding

## 22. Export, Import

Allows exporting customized forms to a file which can be imported on the same or any other site. **Export** produces a .RFF file that contains the schema of all web parts on the form page and some additional metadata. This file can be saved and imported into another form. This is the quickest way to backup your forms and restore them on another environment.

The list where the file is imported should have the same structure (columns) as the exported list. If there are lookups, sublists, sublibraries or other webparts on the exported form, there also should be the corresponding items on the site where the form is imported.

## 2.1.1. Tabs

Tabs is a custom action in the ribbon toolbar to add tabs into the content editor web part.

Tabs are styled by default to fit well for forms in SharePoint 2013 look, therefore they appear natural in your forms design. This group is very handy to use: tabs can be easily reordered, fields are moved to the tabs by simple drag & dropping. Each tab follows the layout rules of vertical group.

| Rich Forms  | - 🗸            |  |
|-------------|----------------|--|
| Name × Adre | ss 🗙 Phone 🗙 🕀 |  |
| Full Name   | [Full Name]    |  |
| First Name  | [First Name]   |  |
| Tabs        | [Last Name]    |  |
| Main        |                |  |

Tabs

## 2.1.2. Lock Contents

Lightning Forms editor provides ability to lock / unlock form contents. This can be done by clicking one of the options under Lock Contents section.

Lock action locks the selected element content: disables editing ability.

Field row is a horizontal group of field label and vertical group of field input and field description. Field row unlocking allows to manage its elements (field label, field input, field description) independently.

| Lock Contents +                  | ++         |             |  |
|----------------------------------|------------|-------------|--|
| Lock Contents<br>Unlock Contents | ast Name * | [Last Name] |  |
|                                  | Last Name  | [Last Name] |  |

Lock Contents

## 2.1.3. Toolbars

Toolbar is a custom action in the ribbon toolbar to add toolbar into the content editor web part.

You can manage buttons separately in ungrouped toolbar.

| Rich Forms Editor - Contac | ts _ |      |          |
|----------------------------|------|------|----------|
|                            | U    | Save | Cancel Q |
|                            |      |      |          |

Toolbars

## 2.1.4. Rich Text Box

Rich Text Box is a custom action in the ribbon toolbar to add rich text box into the form.

Rich Text Box is generally used for displaying, entering and manipulating text with formatting. Now your form can be extended with the freely editable text, hyperlinks, tables or media. Fields are moved to the editable area by simple drag & dropping.

|              | Add a Web Part    |
|--------------|-------------------|
| Rich Forms E | ditor - Contacts  |
|              | It the form below |
| 1            |                   |
|              |                   |
| 8884         |                   |
|              |                   |
| First Name   | [First Name]      |
| Last Name *  | [Last Name]       |

Rich Text Box

## 2.1.5. Insert Fields

**Field** is a custom action in the ribbon toolbar to add fields into the content editor web part. It allows you to add any available for the current form field.

It also provides an ability to add new field directly form the current page: clicking **Add New** button initiates opening of **Create Column** dialog. New field is immediately added to the form.



Insert Field

| Create Column  |   |  |
|--|---|--|
| Name and Type  | Column name:                                      |  |
| Type a name for this column, and select<br>the type of information you want to store |   |  |
| n the column.  | The type of information in this column is:        |  |
|  | Single line of text                               |  |
|  | O Multiple lines of text                          |  |
|  | O Choice (menu to choose from)                    |  |
|  | O Number (1, 1.0, 100)                            |  |
|  | O Currency (\$, ¥, €)                             |  |
|  | O Date and Time                                   |  |
|  | O Lookup (information already on this site)       |  |
|  | O Yes/No (check box)                              |  |
|  | O Person or Group                                 |  |
|  | O Hyperlink or Picture                            |  |
|  | O Calculated (calculation based on other columns) |  |
|  | O Task Outcome                                    |  |
|  | ○ External Data                                   |  |
|  | ○ Managed Metadata                                |  |
| Additional Column Settings   | Description:                                      |  |
| Specify detailed options for the type of<br>nformation you selected.                 |   |  |
| nensen mennybalt förstade tärtige ännat i k  |   |  |
|  | Require that this column contains information:    |  |
|  | 🔿 Yes 💿 No  |  |
|  | Enforce unique values:                            |  |
|  | 🔿 Yes 💿 No  |  |

Field Type

# 2.1.6. Insert Sub List

Using a sublist allows providing a grid view of a related list anywhere inside your form. Related lists are lists that contain a lookup column to the list or library the current form is for. The sublist is editable and can be used on new, edit and display forms.

Available sublists are displayed as the options of Insert sublist custom action in the ribbon toolbar. Only lists or libraries are displayed with a lookup to the form's list.

|   |  | 5 115 115 1101                             |            | le griu.        |             |           |   |
|---|--|--|------------|-----------------|-------------|-----------|---|
| Cffice 365  |  |  |            |                 |             |           |   |
| BROWSE PAGE FORMAT TEXT   |  | B PART RICH EORMS                          | Move Up    | Show grid lines | Uidth: 1 px | C Margin: | 5 |
| Home<br>Notebook<br>Documents<br>Apps in Testing                      | Main                                   | Add  | a Web Part |                 |             |           |   |
| Samples<br>Developer Center<br>Recent<br>Company Projects<br>Contacts | Company Pro                            | ditor - Contacts<br>ojects<br>ription      |            |                 |             |           |   |
| Ardevia Rich Forms Pro<br>Site Contents                               | Last Name *<br>First Name<br>Full Name | [Last Name]<br>[First Name]<br>[Full Name] |            |                 |             |           |   |

#### Insert Sublist

The view of the inserted sublist can be edited in the same way as an out-of-the-box list view web part (to change things like query, fields, etc.):

- · Select the row on the list view
- Click Modify View on the List tab of the ribbon.

| Coffice 365                   |  |                |                |      |                      |                |
|-------------------------------|--|----------------|----------------|------|----------------------|----------------|
| BROWSE EDIT                   | TEMS LIST                                |                |                |      |                      |                |
|                               | 🅎 Modify View 🥃 Current View:            |                | $\bigcirc$     | 2    | Open with Access     | =              |
| View Quick Create             | Modify View                              | Tags &         | E-mail a Alert | RSS  | Connect to Export to | Customize Rich |
| Ědit View                     | Modify in SharePoint Designer (Advanced) | Notes          | Link Me +      | Feed | Outlook Excel        | Forms +        |
| View Format                   | Manage Views                             | Tags and Notes | Share & Tr     | ack  | Connect & Export     | 1              |
| Home<br>Notebook<br>Documents | ✓ Title Descriptio                       | on             |                |      |                      |                |
| Apps in Testing               | Last Name *                              |                |                |      |                      |                |
| Samples                       | First Name                               |                |                |      |                      |                |
| Developer Center              | in structure                             |                |                |      |                      |                |
|                               |  |                |                |      |                      |                |

Modify View

\* If tabular view is turned off on a list view used in a sub list, editing items in sub lists is disabled.

| 1 Office 365                              |   |            |                      |  |
|---|---|------------|----------------------|--|
| BROWSE EDIT                               |   |            |                      |  |
| Save Cancel Paste Cut<br>Commit Clipboard | Delete Attach<br>Item File Spelli<br>Actions Spelli | ng         |                      |  |
| Home                                      | ✓ Title   |            | Description          |  |
| Notebook<br>Documents                     | SIMA #  |            | Management system    |  |
| Apps in Testing                           | FLY Incorpo   | rated #    | Sale tracking system |  |
| Samples<br>Developer Center               |   |            |                      |  |
| Recent                                    | Last Name *   | Dardington |                      |  |
| Ardevia Rich Forms Pro<br>Contacts        | First Name  | Anne       |                      |  |

#### Grid View

On new and edit forms the data edited in the sublist is only stored when the whole form is saved.

# 2.1.6.1. Sublist Column Calculation

Lightning Forms supports calculated and enabled expressions for column cells in a sublist grid. They can be configured on Behaviour tab in Sublist Column section when a column is selected in the form editor and can be used on all available form types.

Unlike the value and validation expressions for form fields, calculated and enabled expressions for sublist columns are available on Display forms too, since the grid is editable.

| 1 Office 365   |          |                         |                    |   |                  |           |                               |      |                                 |
|--|----------|-------------------------|--------------------|---|------------------|-----------|-------------------------------|------|---------------------------------|
| BROWSE PAGE FORMAT TEXT                                    | INSERT   | INSERT W                | EB PART RICH FORMS | BEHAVOUR  |                  |           |                               | _    | i .                             |
| 6 Enabled:<br>Wisble:                                      | f.<br>f. | Initiat:<br>Calculated: |                    | <ul> <li>Required:</li> <li>Validation:</li> <li>Validation Term</li> </ul> | 1<br>            | Calculate | f: [ if( ]]@SubListCurrentRov | s.Ex | C. 5v Est<br>C. Copy<br>□ Paste |
| Control Status   |          | F.                      | eid Value          |   | Field Validation |           | Subilist Column               | _    | Actions                         |
| Home   | Main     |                         |                    |   |                  |           |                               |      |                                 |
| Notebook<br>Apps in Testing<br>Samples<br>Developer Center | + Ri     | ch Forms E              | ditor - Expense    | Report [1]  |                  |           | Add a Web Pa                  | rt   | 0                               |
| Recent   |          | Date                    | Project            | Code  | Description      | Pay Typ   | pe Bill                       | sble | Receipt Total 👻                 |
| Employees<br>Ardevia Rich Forms Pro<br>Expence Receipt     | B        |                         |                    |   |                  |           |                               |      |                                 |
| Site Contents  | τi       | itle "                  | [Title]            |   |                  |           | Manager                       |      | [Manager2]                      |
| Recycle Bin  | Re       | eport Total             | [ReportTotal]      |   |                  |           | Department                    |      | [Department]                    |
| ✓ EDIT LINKS   | Ad       | ivance To Em            | P [AdvanceToEmp]   |   |                  |           | Total To Employ               | /ee  | [TotalToEmployee]               |

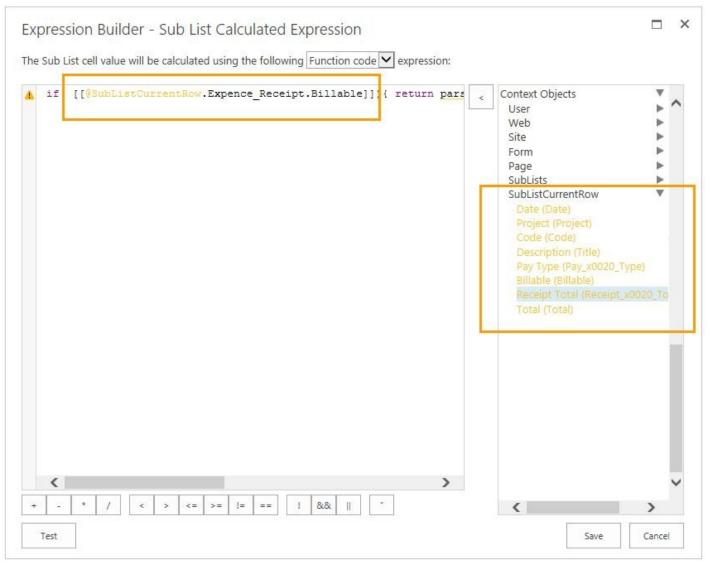
Sublist Column Calculation

#### 1. Calculated

Calculated expression provides a flexible way to dynamically recalculate the value in the column while the user is entering data in the form or other columns of the sublist. Whenever the value of a field referenced in the calculated expression is changed the expression is recalculated and the dependent field's value updated with the result.

The calculation can be based on form field values, as well as on values of other cells in the current row. To reference other cells in the current row SubListCurrentRow placeholders are available under the Context Objects.

### It is possible to set initial value for sublist column using calculated expression relied on main list field (New form).



Sublist Calculated Expression

#### 2. Enabled

Enabled expression allows to enable or disable any cell in the sublist at run-time based on some condition. For example, you can disable cells that are not allowed to be edited depending on other cell values in the current row or form values.

For more information about expressions used for configuring behaviours, see Expressions topic.

# 2.1.6.2. Aggregation over Sublists

There is often a need to perform some operations over all values of a sublist column. Using aggregation functions in expressions sums, counts, mins, maxs, averages or custom logic can be calculated over all values in a column of a sublist. These expressions can be used as field values or to set fields visible or enabled depending on values in the sublists.

| WGE FORMAT TEXT IN | KSERT INSERT WE    | PART RICH FORMS            | BEHAVIOUR        |                |                     |                         |                  |                    |         |       |  |
|--------------------|--------------------|----------------------------|------------------|----------------|---------------------|-------------------------|------------------|--------------------|---------|-------|--|
| ſ                  | 📹 Initial:         | ſ                          | · Required:      |                | f 📄 Calcula         |                         | 5,               |                    | 🐓 Edit  |       |  |
| 5.                 | Calculated: [[@Sul | oLists.Expence_Receipt. fr | ✓ Validation:    |                | f. <u>f</u> Enables | 51                      | f.               |                    | Copy    |       |  |
| Control Status     | -                  | d Value                    | Validation Text: | eld Validation | f.                  | Sublist Column          |                  | Actions            | 🔅 Paste |       |  |
| Joro Salis         | re                 | u voluc                    |                  | eu valgation   |                     | Subisi Column           |                  | PLOOTS             |         |       |  |
| M                  | ain                |                            |                  |                |                     |                         |                  |                    |         |       |  |
|                    |                    |                            |                  |                |                     |                         |                  |                    |         |       |  |
| 1                  |                    |                            |                  |                |                     | Add a Web P             | art              |                    |         |       |  |
| 1                  | Rich Forms Edi     | tor - Expense Re           | nort [1]         |                |                     |                         |                  |                    |         |       |  |
| enter              | Tuerri onna cui    | tor expense ne             | porc[i]          |                |                     |                         |                  |                    |         |       |  |
|                    | ✓ Date             | Project                    | Code             | Description    | Pay Ty              | or 8                    | Table            | Receipt Total      |         | Total |  |
| es                 |                    |                            |                  |                |                     |                         |                  |                    |         |       |  |
| tich Forms Pro     |                    |                            |                  |                |                     |                         |                  |                    |         |       |  |
| Receipt            |                    |                            |                  |                |                     |                         |                  |                    |         |       |  |
| s                  | Title *            |                            |                  |                |                     |                         |                  |                    |         |       |  |
|                    | TITLE -            | (Title)                    |                  |                |                     | Manager                 | [                | [Manager2]         |         |       |  |
| s                  | Report Total       | [ReportTotal]              |                  |                |                     | Department [Department] |                  |                    |         |       |  |
|                    | Advance To Emp     | [AdvanceToEmp]             |                  |                |                     | Total To Emplo          | TotalToEmployee] |                    |         |       |  |
|                    | Billable Total     | [BillableTotal]            |                  |                |                     | Non-Billable T          | otal [           | [NonBillableTotal] |         |       |  |
|                    | Period Start       |                            | -                |                | -                   |                         |                  |                    |         |       |  |
|                    | Period Start       | [PeriodStart]              |                  |                |                     | Period End              | [[               | [PeriodEnd]        |         |       |  |
|                    | Description        | [Description]              |                  |                |                     |                         |                  |                    |         |       |  |
| 1                  | 6                  |                            | 0                |                |                     |                         |                  |                    |         |       |  |
|                    | Total              | [Total]                    |                  |                | -                   |                         |                  |                    |         |       |  |

Aggregation over Sublists

| Expression Builder - Calculated Value The field value will be calculated using the following Template express | ion:   |             |
|---|--|-------------|
| [[@SubLists.Expence_Receipt.Total.Sum]]   | <ul> <li>Context Objects         User         Web         Site         Form         Page         SubLists         Expence Receipt         Date (Date)         Project (Project)         Code (Code)         Description (Title)         Pay Type (Pay_x0)         Billable (Billable)         Receipt Total (Receipt Tota) (Receipt Total (R</li></ul> | 020_Type) ► |
| Test  | Save   | Cancel      |

Expression Builder Sublist

# 2.1.7. Insert Sublibrary

Using a sublibrary allows providing a document library view with folders and drag and drop functionality anywhere inside your form. Rich Forms will automatically organize all documents in a folder per parent item generated on the document library.

All available libraries are displayed to be inserted using the Insert Sublibrary custom action of the ribbon toolbar.

| Save Concertorize Form Field Group Table Tabs Toolbar Rich Text Button and Insert Box Link - Sublist - Sub |   |
|--|---|
| Image: Provide and Series (Control of the series of the                                |   |
| Home<br>Documents<br>Apps in Testing<br>Samples<br>Developer Center<br>Recent<br>Tasks Documents<br>Tasks Documents<br>Tasks Documents<br>Add a Web P<br>P<br>P<br>P<br>P<br>P<br>P<br>P<br>P<br>P<br>P<br>P<br>P<br>P   | Image: Select Element -       Image: Select Element - |
| Recent Tasks Documents Tasks Documents Tasks Ardevia Rich Forms Pro  | Image: State Assets   |
| Site Contents There are no documents in this view.   | Modified By   |
| EDIT LINKS     Task Name*     [Task Name]  |   |
| Start Date [Start Date] Due Date [Due Date]  |   |

Insert Sublibrary

The view of the inserted sublibrary can be edited in the same way as an out-of-the-box list view web part (to change things like query, fields, etc.):

- Select some document
- Click Modify View on the List tab of the ribbon.

The view behaves at run-time just like the out-of-the-box view, including filtering, sorting and adding columns functionalities.

The items are saved without saving the form.

| SharePoint  |   |       |        |  |
|---|---|-------|--------|--|
| BROWSE VIEW   |   |       |        |  |
| Version History<br>Edit<br>Item Manage Actions  |   |       |        |  |
| Home<br>Documents<br>Apps in Testing<br>Samples<br>Developer Center<br>Recent<br>Tasks Documents<br>Tasks | <ul> <li>New Dupload</li> <li>Name</li> <li>Goals and Object</li> <li>Tools B</li> </ul>  |       |        |  |
| Ardevia Rich Forms Pro<br>Site Contents   | Task Name * Prepa<br>Start Date 8/10/7<br>Due Date 8/15/7<br>Assigned To<br>% Complete 60 %<br>Description<br>Predecessors        |       |        |  |
|   | Priority (1) His<br>Task Status In Pro<br>Created at 8/12/2015 4:52 PM I<br>Last modified at 8/12/2015 4:54<br>Content Type: Task | gress | Cancel |  |

Sublibrary saving

#### **Folder structure**

Folders per list item in the sublibraries are created automatically when the corresponding item's form is opened. All related files are saved inside this folder.

The folders are named using the list's name and item's ID.

| Tasks  | Tasks Documents   | Tasks Documents - Tasks-1   |
|--|---|---|
| rew task or edit this list     All Tasks Calendar Completed ··· Find an item | New      Upload      Sync      Share More      All Documents      Find a file      P      Name Modified | ⊕ New         ▲ Upload            All Documents           ✓           Name           Modified |
| Prepare a conference presentation to Saturday     Planning and scheduling to | Tasks-1 ··· About an hour ago<br>Tasks-2 ··· A few seconds ago  | Goals and Objectives # ···· About an hour ago     Tools # ··· 15 minutes ago                  |

Folder Structure

### 2.2. Behavior Tab

### **Behaviour Tab Features**

Behaviour tab contains controls for configuring complex business logic. Once you open your form in design mode, it will appear after standard SharePoint tabs and the Rich Forms tab.

Flexibly configurable, expression-based behaviours provide an easy way to make a field or form section dynamically show or hide or become enabled or disabled depending on other inputs, set default values and even recalculate them while the user is entering data in the form.

For more information about expressions used for configuring behaviours, see Expressions topic.

| PAGE FORMAT TEXT INSERT   | RICH FORMS BEHAVIOU | UR 3                    | 4                            | 5         |       |                   |         |              |        |           |    |
|---|---------------------|-------------------------|------------------------------|-----------|-------|-------------------|---------|--------------|--------|-----------|----|
| Enabled:  | 🖍 🎬 Initial:        |                         | fx Required:                 | 6         | fre   | 8                 | ₩ Edit  |              | W Edit |           | fi |
| Visible:  | f. 🔒 Calculated:    |                         | f <sub>x</sub> ✓ Validation: | -         | f.    | r                 | 🖉 Сору  |              | Copy   | 1         |    |
| 2   |                     | 4                       | Validation Text:             | k         | fx    |                   | 🔁 Paste | 9            | Paste  |           |    |
| Control Status  | Fi                  | ield Value              | Field                        | Validatio |       | Button/Link Actio | ns      | Form Load Ar | tions  | 10 Filter |    |
|   |                     |                         |                              |           |       |                   |         |              |        |           |    |
| Home  | Main                |                         |                              |           |       |                   |         |              |        |           |    |
|   | Main                |                         |                              |           | _     |                   |         |              |        |           |    |
| Notebook  | Main                | Ar                      | dd a Web Part                |           |       |                   |         |              |        |           |    |
| Notebook<br>Apps in Testing   |                     |                         |                              |           |       |                   |         |              |        |           |    |
| Notebook<br>Apps in Testing<br>Samples  |                     | Ai<br>Editor - Contacts | s                            |           |       |                   |         |              |        |           |    |
| Notebook<br>Apps in Testing<br>Samples<br>Developer Center  |                     |                         |                              |           | 0-0-  |                   |         |              |        |           |    |
| Home<br>Notebook<br>Apps in Testing<br>Samples<br>Developer Center<br>Recent<br>skybow Rich Forms Pro | Rich Forms E        | Editor - Contacts       | s                            |           | 0-0-0 |                   |         |              |        |           |    |

#### Behaviour Tab

#### 1. Enabled

Enabled expression allows to enable or disable any selectable controls at run-time based on some condition.

For example, you can disable controls that are not allowed to be edited depending on other field values or disable a button to prevent the user from clicking it depending on his group memberships.

This option is available on all form types: New, Edit, Display.

### 2. Visible

Visible expression allows to change the visibility of any selectable controls at run-time based on some condition.

For example, you can hide or show form controls based on conditions. As an example, a field can be shown only when the field 'Status' is set to 'Active': =[[Status]]=='Active'

This option is available on all form types: New, Edit, Display.

### 3. Initial

Initial value expression allows to assign a default value to a field. This can be a constant or a calculated expression.

For example, you can set current date as a default value: '= new Date()'

This option is available only on New forms.

#### 4. Calculated

Calculated expression provides a flexible way to dynamically recalculate the value while the user is entering data in the form. Whenever the value of a form field referenced in the calculated expression is changed the expression is recalculated and the dependent field's value set with the result.

For example, you can use it to perform a mathematical calculation – multiplying the values contained in two fields in order to produce a Total Amount in the current field: '=[[Price]]\*[[Count]]'

This option is available only on New and Edit forms.

#### 5. Required

Required expression is used to specify the condition when a field's value must be set before the form can be submitted.

For example, you can specify that users must fill in an "Explanation" field when the leave requests "Reason" field is "Other": = [[Reason]] == "Other"

This option is available only on New and Edit forms.

### 6. Validation

Validation expression provides an easy way to define a validation rule. Using expressions even complex rules can be defined to specify required form input. These can depend on the entered data. When the validation expression evaluates to false the form can not be saved and the message evaluated using Validation Text (see below) is shown.

For example, when the "Reason" field is "Compensation" the "Duration" field can not be higher than 3 days: = ([[Reason]] != "Compensation") || ([[Duration]] <= 3)

This option is available only on New and Edit forms.

### 7. Validation Text

Validation Text expression is used to specify the text that is shown when the Validation expression (see above) fails (t.i. returns false).

### 8. Button/Link Actions

Actions can be defined on buttons or links to specify what should happen when these are clicked.

The Actions Builder allows you to edit which actions in which order and under which conditions should be executed.

The following action types are available:

Actions Builder Add List Item Delete List Item Execute Script HTTP Request Open List Form Open Web Page Redirect to URL Reload Page Save Form Send Mail Show Message Start Workflow Update List Item

Most actions require some parameters which can be configured in the Actions Builder. In most cases this configuration can depend on form data or contextual information using expressions. Thus even complicated data-dependent logic or navigation can easily be implemented without any programming knowledge.

### 9. Form Load Actions

It is also possible to define actions that are executed when the form is loading. All previously described action types are available.

### **10. Lookup Filtering**

Filter criteria can be set when some lookup field is selected.

CAML Query Editor is accessible when Edit Query button is clicked.

### **11. Sublist Column Expressions**

Rich Forms supports calculated and enabled expressions for column cells in a sublist grid. They can be configured when a column is selected in the form editor and can be used on all available form types.

For more information see here.

## 2.2.1. Expressions

### Introduction

Business and UI-logic on forms need to be flexible to fulfil all the possible needs and wishes. Rich Forms provides a powerfull expression language to enable configuring forms freely. Throughout the forms editor expressions can be used to dynamically calculate a value or text given a specific context.

To cater for different uses any expression can be defined in any of the following forms: Template Expressions, Value Expressions, Function Expressions.

### **Template expressions**

Text templates are a special form of expressions in which placeholders are replaced by string representation (always returns a string, placeholders are always converted to string before inserted). Placeholders can contain field paths [[CaseFile.Title]] or expressions [[= Context.Web.Title]] (begin with equals sign).

This form allows to define textual values in a simpler, more abreviated and suitable manner than the other forms. As an example, we can write '[[Firstname]] [[Lastname]]' for a calculation of a text field value, instead of needing the more complex value expression ('=[[Firstname]] + " " + [[Lastname]]').

Syntax: Use plain text containing placeholders to insert dynamically calculated text. Example: Use the expression 'Welcome [[Firstname]] [[Lastname]]!' to calculate the text 'Welcome Mary Hunter!' when the values of field Firstname and LastName are 'Mary' and 'Hunter'

### Assignment expressions

With value expressions we can define texts and values to be calculated using JavaScript-based assignment terms.

Syntax: The "=" sign at the beginning of expressions signals that it is an assignment expression, otherwise it is evaluated as a template expression. When the assignment expression type has been selected in the expression builder the preceding equals does not need to be typed though. Use placeholders in double square brackets to access a field value or context object that is dynamically evaluated. Example: = [[MyTest]] + ' is calculated value'

### **Function Expressions**

Using function expressions more complex calculations can be defined. The expression allows using the full scope of JavaScript code as in bodies of JavaScript functions. Values must be returned using 'return ;' statements.

Syntax: Starting with "{" signals that it is a function body expression. In the expression builder the curly brackets don't need to be typed though. Except for the use of placeholders in double square brackets to inject field values and context information the syntax is the same as used in JavaScript function bodies. Example: { var myValue = [[Title]]; if (myValue.indexOf('Test') > -1) return "Is Test"; else return myValue; }

# 2.2.1.1. Expression Examples

### Initially setting date time fields

| = new Date()                 | Set the current date time (can also be done just by using SharePoint default column value available in column's configuration) |
|------------------------------|--|
| = new Date(2014,<br>5, 3)    | Set the date to 3rd June 2014. Note: The month (2nd) parameter is 0-based, so January is 0 and December is 11.                 |
| = new<br>Date().addDays(10)  | Set the date to current date (and time) plus 10 days. Use addDays(-n) to subtract n days.                                      |
| = new<br>Date().addHours(4)  | Set the date to 2 hours in future.   |
| = new<br>Date().addYears(-1) | Set the date a year ago from today.  |

### Calculating date time fields

| =[[SomeOtherDate]]  | Get the date time field of another date time field. Note: Use value expression when setting fields using calculated expressions.  |
|---|---|
| =[[SomeOtherDate]].addDays(10)  | Get the date time field of the SomeOtherDate column plus 10 days.   |
| <pre>{ if ([[ContractType]] "Monthly") return<br/>[[StartDate]].addMonths(1); else if<br/>([[ContractType]] "Quarterly") return<br/>[[StartDate]].addMonths(3); else if<br/>([[ContractType]] "Semi-Annually") return<br/>[[StartDate]].addMonths(6); else if<br/>([[ContractType]] "Annually") return<br/>[[StartDate]].addYears(1); else return null;<br/>}</pre> | Get a date depending on value of field ContractType and<br>StartDate. When ContractType is "Monthly" the date is calculated<br>as StartDate plus 1 month, when ContractType is "Quarterly" the<br>date is calculated as StartDate plus 3 months, etc. If<br>ContractType does not match any of the checked values no date<br>is returned.As an example this function expression could be used<br>as a calculated expression to set the RenewalDate field of a<br>contract item. |

### **Retrieving information for current user**

| [[@User.Email]]     | Get the email address of the currently signed in user. |
|---------------------|--|
| [[@User.LoginName]] | Get the login name of the currently signed in user.    |

### Retrieving information for the user selected for a field

| [[SomeUserField.Email]]     | Gets the email address of the user selected for the field SomeUserField. |
|-----------------------------|--|
| [[SomeUserField.LoginName]] | Gets the login name of the user selected for the field SomeUserField.    |

# 2.2.1.2. Expression Builder

Use the Expression Builder to easily write and verify expressions.

| I [[FirstName]]+* '+[[Title]]       Image: Second Se  | ne field value will b                            | be calculated using the following Assignment<br>Function code         |   |     |
|--|--|---|---|-----|
| First Name Mark Full Name Mark Smith Email Address Company Job Title Business Phone Mark Smith Mark Smith Attachments Context Objects ContextO | + - * /<br>Test                                  | >     >=     !=     !     &&     !       ucceeded!     Value: " John" | Title<br>FirstName<br>FullName<br>Email<br>Company<br>JobTitle<br>WorkPhone<br>HomePhone<br>CellPhone<br>WorkFax<br>WorkAddress<br>WorkCity<br>WorkState<br>WorkState<br>WorkZip<br>WorkCountry | *   |
| Full Name Mark Smith   Email Address Email   Email Address Title   Company Id   Profile Profile   AboutMe AccountName   Business Phone CellPhone   | .ast Name *                                      | Smin  |   |     |
| Email Address  Company  ob Title  Business Phone  Title  LoginName  Ld  Profile  AboutMe  AccountName  CellPhone  CellPhone  |  |   | Comments<br>Attachments   |     |
| Company<br>ob Title<br>Business Phone  | irst Name  | Mark  | Comments<br>Attachments<br>Context Objects<br>User  | 2.5 |
| ob Title AboutMe<br>AccountName<br>CellPhone CellPhone   | irst Name<br>ull Name                            | Mark  | Comments<br>Attachments<br>Context Objects<br>User<br>Email<br>Title  |     |
| Business Phone CellPhone   | irst Name<br>ull Name<br>mail Address            | Mark  | Comments<br>Attachments<br>Context Objects<br>User<br>Email<br>Title<br>LoginName<br>Id   | *   |
|  | irst Name<br>ull Name<br>mail Address<br>Company | Mark  | Comments<br>Attachments<br>Context Objects<br>User<br>Email<br>Title<br>LoginName<br>Id<br>Profile<br>AboutMe   | ¥   |

#### Expression Builder

Use the dropdown to select between the different expression types. Enter the expression in the text editing box.

To assist inserting placeholders all available fields and context object placeholders on the right hand panel are shown and can be added using the arrow button or double click. Afterwards expression can be checked

by clicking the Test button. The result is then shown along with the editable form. The forms buttons are disabled in this mode, but using the Test button again expression can be re-evaluated.

# 2.3. Actions Builder

Actions Builder is a tool that allows you to specify the actions for buttons and links controls. The dialog consists of 2 parts: list of actions and list of properties according to selected action.

| Save Form   | × | Title<br>Condition | Send Mail  |  | f  |
|-------------|---|--------------------|--|--|--|
| Redirection | x | Туре               | Select Action Type<br>Add list item<br>Delete list item<br>Execute Script<br>HTTP Request<br>Open List Form<br>Open a Web Page<br>Redirect to Url<br>Reload Page<br>Save Form<br>Send Mail<br>Show message<br>Start workflow<br>Update list item | from and to users in the current tenant. | f.           f.           f.           f.           f. |

#### Actions Builder

To add an action, click the 'Add Action' button.

All actions have the following general properties:

Title: Title to use for the action in the list of actions. Type: Choose the action type to use when executing the action. Depending on types, each action link has additional properties.

Actions are executed one by one as they are shown in the left hand list. To change order of the actions, use appropriate Up and Down arrow buttons.

The following action types are available:

Actions Builder Add List Item Delete List Item Execute Script HTTP Request Open List Form Open Web Page Redirect to URL Reload Page Save Form Send Mail Show Message Start Workflow Update List Item

## 2.3.1. Add List Item

Add List Item action allows adding a new item dynamically to the specified list.

When action link type "Add List Item" is selected, the following additional properties can be specified:

• List: a list where a new item should be added. It is possible to select the list from the current or any other site, by selecting the list in 'Select List or Library' dialog or typing the server relative URL to a list.

You cannot add an item (document) to a library using this action type.

- Content Type: Allows choosing the content type of the item to be added.
- Fields specific for Content Type: Depending on the content type, all relevant fields are displayed at the bottom, so that for each field the value to be set can be configured.

When the Add List Item action is executed, the new item is added immediately setting the configured field values.

Expression-based values for these fields can be easily set using the placeholders available in Expression Builder.

A Only specified fields will be updated. If you leave the field blank, it will not be changed.

| Add Second Contact | × | Title                   | dd Second Contact                   |              |   |
|--------------------|---|-------------------------|-------------------------------------|--------------|---|
| Reload Page        | × | Condition               |                                     |              | f |
|                    |   | Туре                    | dd list item                        |              |   |
|                    |   | List:                   | /sites/RichFormsTest/Lists/Contacts |              | ^ |
|                    |   | Content Typ             | e Contact                           |              |   |
|                    |   | Last Name *             | [[Title]]                           | f.           |   |
|                    |   | First Name              | Mrs                                 | f.           |   |
|                    |   | Fu <mark>ll</mark> Name |                                     | f.           |   |
|                    |   | Email Addre             | 55                                  | f.           |   |
|                    |   | Company                 | [[Company]]                         | f.           |   |
|                    |   | Job Title               |                                     | $f_{x}$      |   |
|                    |   | Business Ph             | [[WorkPhone]]                       | f.           |   |
|                    |   | Home Phon               | [[HomePhone]]                       | ∫ <i>f</i> ∗ |   |
|                    |   | Mobile Nun              | ber                                 | f.           |   |

Actions Builder On Click

### 2.3.2. Delete List Item

Delete List Item action allows deleting list items dynamically.

When the action type "Delete List Item" is selected, the following additional properties can be specified:

- List: a list where an item should be deleted. It is possible to select the list from the current or any other site, by selecting the list in 'Select List or Library' dialog or typing the server relative URL to a list.
- List Item Id: ID or expression to be evaluated as ID of an item.
- Move to Recycle Bin: specifies if the items should be moved to the recycle bin and not deleted completely

When the Delete List Item action is executed, the list item with the specified ID is moved to the recycle bin or deleted immediately depending on the configuration.

Expression-based values for these fields can be easily set using the placeholders available in Expression Builder.

| K Delete Contact    | × | Title       | Delete Contact   |            |
|---------------------|---|-------------|------------------|------------|
| Show Success Mesage | × | Condition   |                  | f.         |
| Reload Page         | × | Туре        | Delete list item |            |
|                     |   | List:       |                  |            |
|                     |   | List item I | d:               | ∫ <u>∗</u> |
|                     |   | Move to F   | Recycle Bin: 🔽   |            |
|                     |   |             |                  |            |
|                     |   |             |                  |            |
|                     |   |             |                  |            |
|                     |   |             |                  |            |
|                     |   |             |                  |            |
|                     |   |             |                  |            |
|                     |   |             |                  |            |
|                     |   |             |                  |            |

Delete List Item

## 2.3.3. Execute Script

Execute Script action allows executing JavaScript code.

When action type "Execute Script" is selected, the Script body property should be specified.

| Expressions an script with [[ID]                    | re supported, thus<br> ] inside. | making it possible e.g. to pass the current item ID to the                         |
|---|----------------------------------|--|
| Actions Builder - O<br>The following actions will b |                                  | n or link is clicked   |
| 🕒 JS Script   | × Title<br>Condition             | JS Script  |
| + Add Action  | Type<br>jQue                     | Execute Script         erry('[title^="Date2"]').closest('tr.ms-rteTableEvenRow-2') |
|   |                                  | Save Cancel  |

Actions Builder On Click

# 2.3.4. HTTP Request

HTTP Request action allows sending different types of requests:

- GET
- POST
- PUT
- DELETE
- JSONP

When action type "HTTP Request" is selected, the Data property can be specified. It is data to be sent to the server and is appended to the url or sent in the request body depending on the type of request. Object must be Key/Value pairs ({ name: "John", location: "Boston" }) or an XML document.

\* Expressions are supported, thus making it possible e.g. to pass the current item ID to the script with [[ID]] inside.

| GET Contacts AllItems.aspx 🛛 🗙 | Title GI     | T Contacts AllItems.aspx                   |            |
|--------------------------------|--------------|--|------------|
|                                | Condition    |  | f          |
|                                | Туре НТ      | TP Request                                 |            |
|                                | Url:         | [[@Site.Url]]/Lists/Contacts/AllItems.aspx | ∫ <u>s</u> |
|                                | Request Type | e GET                                      |            |
|                                | Data:        |  | f          |
|                                |              |  |            |
|                                |              |  |            |
|                                |              |  |            |
|                                |              |  |            |
|                                |              |  |            |
|                                |              |  |            |
|                                |              |  |            |

HTTP Request

# 2.3.5. Open List Form

Open List Form action allows opening a New, Edit or Display form dynamically in a popup, dialog, the same or a new window.

When action type "Open List Form" is selected, the following additional properties can be specified:

- 1. List: The list where the form is located. It is possible to select the list from the current or any other site, by selecting the list in 'Select List or Library' dialog or typing server relative URL to a list.
- Form: Drop-down list with form types: New, Edit or Display (if a library is selected as the list, only the Edit and Display options are available).
   According to selected form type, the following fields appears:
- List Item Id: ID or expression to be evaluated as ID of an item if a Display or Edit form is selected.
- Content Type: Provides option for choosing content type to be added if a New form is selected.
- 1. Additional Query String: Allows adding further text to query string (the question mark "?" or ampersand "&" does not need to be typed at the beginning).
- 2. Open in: Provides options for choosing how a form should be opened. There are four options available:
- Modal dialog: the user is able to specify Title, Width (600 pixels by default) and Height (800 pixels by default) as well.
- Parent frame
- New window
- Popup browser window: the user is able to specify Width (600 pixels by default) and Height (800 pixels by default) as well.

Expressions are supported, thus making it possible e.g. to pass the current item ID using the [[ID]] placeholder. You can use Expression Builder to easily assemble your expression.

| Open Contact Edit Form | × Title      | Open Contact   | Edit Form                |              |    |
|------------------------|--------------|----------------|--------------------------|--------------|----|
|                        | Condition [  |                |                          |              |    |
|                        | Туре [       | Open List Form | <b>v</b>                 |              |    |
|                        | List:        | /sites/Rich    | FormsTest/Lists/Contacts | g            |    |
|                        | Form:        | EditForm.a     | spx 🗸                    |              |    |
|                        | List Item Io | d: =[[ID]]     |                          |              | f. |
|                        | Additional   | Query String:  |                          |              | f. |
|                        | Open in      |                | Modal dialog             | $\checkmark$ |    |
|                        | Title:       |                | Edit Contact             |              | f. |
|                        | Width:       |                | 600                      |              | f. |
|                        | Height:      |                | 800                      |              | f  |
|                        |              |                |                          |              |    |
|                        |              |                |                          |              |    |
|                        |              |                |                          |              |    |

Modal Dialog

## 2.3.6. Open Web Page

Open Web Page action allows executing URL or expressions to be evaluated as URL for the link.

When action type "Open Web Page" is selected, the following additional properties should be specified:

- 1. Additional Query String: Allows adding further text to query string (the question mark "?" or ampersand "&" does not need to be typed at the beginning).
- 2. Open in: Provides options for choosing how a form should be opened. There are four options available:
  - Modal dialog: the user is able to specify Title, Width (600 pixels by default) and Height (800 pixels by default) as well.
  - Parent frame
  - New window
  - Popup browser window: the user is able to specify Width (600 pixels by default) and Height (800 pixels by default) as well.

Expression-based values for these fields can be easily set using the placeholders available in Expression Builder.

| Open Microsoft Official Ho 🗙 | Title Open Microso       | ft Official Home Page                       |    |
|------------------------------|--------------------------|---|----|
|                              | Condition                |   |    |
|                              | Type Open a Web P        | age 🗸                                       |    |
|                              | Url:                     | http://www.microsoft.com/uk-ua/default.aspx | f. |
|                              | Additional Query String: |   | f  |
|                              | Open in                  | Modal dialog                                |    |
|                              | Title:                   |   | f  |
|                              | Width:                   | 600   | f  |
|                              | Height:                  | 800   | f  |
|                              |                          |   |    |
|                              |                          |   |    |
|                              |                          |   |    |
|                              |                          |   |    |
|                              |                          |   |    |

Open a Web Page

# 2.3.7. Redirect to URL

Start Workflow action allows starting a SharePoint Workflow dynamically. When action type "Start Workflow" is chosen, the following additional properties can be specified:

- Work Flow Name: The name of workflow for the current list or content type.
- List Item Id: ID or expression to be evaluated as ID of an item.

Expression-based values for these fields can be easily set using the placeholders available in Expression Builder.

Only SharePoint 2013 workflows are supported.

| Add bonus item | × | Title       | Add bor          | nus item                         |            |
|----------------|---|-------------|------------------|----------------------------------|------------|
|                |   | Condition   |                  |                                  | f,         |
|                |   | Туре        | Start wor        | rkflow 🗸                         |            |
|                |   | Note: Only  | <u>SharePoir</u> | nt 2013 workflows are supported. |            |
|                |   | Work Flow   | v Name           | Add bonus item 🔽                 |            |
|                |   | List item I | d:               | =[[ID]]                          | ∫ <u>∗</u> |
|                |   |             |                  |                                  |            |
|                |   |             |                  |                                  |            |
|                |   |             |                  |                                  |            |
|                |   |             |                  |                                  |            |
|                |   |             |                  |                                  |            |
|                |   |             |                  |                                  |            |
|                |   |             |                  |                                  |            |
|                |   |             |                  |                                  |            |
|                |   |             |                  |                                  |            |
|                |   |             |                  |                                  |            |

Start Workflow

# 2.3.8. Reload Page

In some scenarios after some actions (i.e. updating or adding list item) it is necessary to reload the page. This can be done with the Reload Page action. It does not require any additional properties.

| * "Reload Page" ad<br>ignored as it relo                  | ction sh<br>ads the | ould be t<br>page. | he last in the       | e actions list | t. All followin | ng actions will b | e                |
|---|---------------------|--------------------|----------------------|----------------|-----------------|-------------------|------------------|
| Actions Builder - On (<br>The following actions will be e |                     | en the butto       | n or link is clicked | 8.             |                 |                   | □ ;              |
| * Add second contact                                      | ×                   | Title              | Reload Page          |                |                 |                   |                  |
| 🖸 Reload Page   | ×                   | Condition<br>Type  | Reload Page          | V              |                 |                   | $f_{\mathbf{x}}$ |
|   |                     |                    |                      |                |                 |                   |                  |
|   |                     |                    |                      |                |                 |                   |                  |
|   |                     |                    |                      |                |                 |                   |                  |
|   |                     |                    |                      |                |                 |                   |                  |
|   |                     |                    |                      |                |                 |                   |                  |
|   |                     |                    |                      |                |                 |                   |                  |
| •   |                     |                    |                      |                |                 |                   |                  |
| + Add Action  |                     |                    |                      |                |                 | Save              | Cancel           |

Reload Page

# 2.3.9. Save Form

Save Form action stores all modifications in the list form. It does not require any additional properties.

| Actions Builder - Or          |               |              |                      |            | × |
|-------------------------------|---------------|--------------|----------------------|------------|---|
| The following actions will be | executed wher | n the buttor | n or link is clicked |            |   |
| R Save changes                | ×             | Title        | Save changes         |            |   |
|                               | c             | Condition    |                      | f <u>x</u> |   |
|                               |               | Туре         | Save Form            |            |   |
|                               |               |              |                      |            |   |
|                               |               |              |                      |            |   |
|                               |               |              |                      |            |   |
|                               |               |              |                      |            |   |
|                               |               |              |                      |            |   |
|                               |               |              |                      |            |   |
|                               |               |              |                      |            |   |
|                               |               |              |                      |            |   |
|                               |               |              |                      |            |   |
|                               |               |              |                      |            |   |
|                               |               |              |                      |            |   |
| + Add Action                  | •             |              | ·                    |            |   |
|                               |               |              | Save                 | Cancel     |   |

Save Form

# 2.3.10. Send Mail

Send Mail action allows sending dynamically generated emails from your site.

When action type "Send Mail" is selected, the following additional properties can be specified:

- From: An email address or an expression to be evaluated as an email address to be used as the sender.
- To: Email addresses or an expression to be evaluated as the email addresses to be used as receivers of the email. If multiple receivers are defined the email addresses must be separated by semicolons (i.e. "support@skybow.com; test@test.com").
- **CC**: Email addresses or an expression to be evaluated as the email addresses to be used as "carbon copy" receivers of the email. If multiple receivers are defined the email addresses must be separated by semicolons (i.e. "support@skybow.com; test@test.com").
- BCC: Email addresses or an expression to be evaluated as the email addresses to be used as "blind carbon copy" receivers of the email. If multiple receivers are defined the email addresses must be separated by semicolons (i.e. "support@skybow.com; test@test.com").
- Subject: Subject of the email to be sent. Expressions can be used to dynamically generate this.
- Body: Actual email message to be sent. Expressions can be used to dynamically generate this.
- Send As Text: If enabled, email is sent in plain text otherwise it is sent as HTML mail.

Mails will be sent only from and to users in the current tenant.

| Send Email to the Contact | × Title     | Send Email to the Contact   |                |
|---------------------------|-------------|---|----------------|
| ■ Show Success Mesage     | × Condition |   |                |
|                           | Туре        | Send Mail   |                |
|                           | Note: Shar  | ePoint will only send mails from and to users in the current tenant.  |                |
|                           | From:       | [[@User.Email]]   | f <sub>x</sub> |
|                           | To:         | [[Email]]   | ∫ <b>f</b> ∗   |
|                           | CC:         |   | f.             |
|                           | BCC:        | sales.manager@skybow.com  | f.             |
|                           | Subject:    | New tasks   | f.             |
|                           | Body:       | Hi,<br>[[FullName]] from [[Company]] would like to order the items listed in the<br>The listed items are to be delivered to:<br>[[Address]]<br>[[City]], [[State]]. [[Country]] | ∫ <b>,</b>     |
|                           |             | < >>  | 1              |

Send Email

## 2.3.11. Show Message

Show Message action allows showing message dynamically as a dialog, status or notification. When action type "Show Message" is selected, the following additional properties can be specified:

- 1. Text: Template expression defining the message to be displayed (HTML tags can be used as well).
- 2. **Show as**: Provides options for choosing how a message should be shown. There are three options available:
  - **Dialog**: the user is able to specify Dialog Title, Width (400 pixels by default) and Height (150 pixels by default).
  - **Status**: the user is able to specify Status Title, Delay in seconds (if "0" is set, the message does not disappear until the page is refreshed), and Color (Information, Success, Warning, Error)
  - **Notification**: the user is able to specify Delay in seconds (if "0" is set, the message does not disappear until the page is refreshed).

Expression-based values for these fields can be easily set using the placeholders available in Expression Builder.

| Show success message     Ype     Type     Show message     Text: <a href="text:status"><a <="" a="" href="text:status"></a>      Show as Status   Status Status   Status Title:   Successfully Successfully</a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a></a> | Update company details | × Title   | Show success me          | ssage   |                |
|---|------------------------|-----------|--------------------------|---|----------------|
| Text: <b>[[FullName]]</b> contact details are updated         Show as       Status         Status Title:       Successfully   | Show success message   | × Conditi | on                       | 70  | t              |
| Show as     Status       Status Title:     Successfully   |                        | Туре      | Show message             | $\checkmark$                                    |                |
| Status Title: Successfully  |                        | Text:     |                          | <b>[[FullName]]</b> contact details are updated | <i>f</i> ∗     |
|   |                        | Shov      | v as                     | Status  |                |
| Delas is secondara formada  |                        | Statu     | is Title:                | Successfully                                    | f <sub>x</sub> |
| Delay in seconds(0 forever): 5  |                        | Dela      | y in seconds(0 forever): | 5   | f <sub>x</sub> |
| Status Color Success  |                        | Statu     | is Color                 | Success 🔽                                       |                |
|   |                        |           |                          |   |                |

Show Success Message

## 2.3.12. Start Workflow

Start Workflow action allows starting a SharePoint Workflow dynamically. When action type "Start Workflow" is chosen, the following additional properties can be specified:

- Work Flow Name: The name of workflow for the current list or content type.
- List Item Id: ID or expression to be evaluated as ID of an item.

Expression-based values for these fields can be easily set using the placeholders available in Expression Builder

Only SharePoint 2013 workflows are supported.

| Add bonus item | × | Title Add bonus item                                |                  |
|----------------|---|---|------------------|
|                |   | Condition   | $f_{\mathbf{x}}$ |
|                |   | Type Start workflow                                 |                  |
|                |   | Note: Only SharePoint 2013 workflows are supported. |                  |
|                |   | Work Flow Name Add bonus item                       |                  |
|                |   | List item Id: =[[ID]]                               | f <sub>x</sub>   |
|                |   |   |                  |
|                |   |   |                  |
|                |   |   |                  |
|                |   |   |                  |
|                |   |   |                  |
|                |   |   |                  |
|                |   |   |                  |
|                |   |   |                  |
|                |   |   |                  |
| Add Action     |   |   |                  |

Start Workflow

# 2.3.13. Update List Item

Update List Item action allows updating a list item immediately with configurable values.

When action type "Update List Item" is selected, the following additional properties can be specified:

- List: a list where the list item should be updated. It is possible to select the list from the current or any other site, by selecting the list in 'Select List or Library' dialog or typing a server-relative URL to a list.
- List Item ID: ID or expression to be evaluated as ID of an item.
- Fields specific for current list: At the bottom of the configuration all fields of the selected list are shown, so that for every field the value to be set can be specified.

Expression-based values for these fields can be easily set using the placeholders available in Expression Builder.

It is possible to set null (as Assignment expression "=null") and " " (empty string) values.

A Only specified fields will be updated. If you leave the field blank, it will not be changed.

| Update Company Deetails | × | Title Upda     | te Company Deetails                 |
|-------------------------|---|----------------|-------------------------------------|
| ■ Show Success Mesage   | × | Condition      | 1                                   |
| 2 Reload Page           | × | Type Updat     | e list item 🔽                       |
|                         |   | List:          | /sites/RichFormsTest/Lists/Contacts |
|                         |   | List item Id:  | =[[ID]] <b>f</b>                    |
|                         |   | Content Type   | Contact 🖌                           |
|                         |   | Last Name *    | f.c.                                |
|                         |   | First Name     | ∫.                                  |
|                         |   | Full Name      | f <u>r</u>                          |
|                         |   | Email Address  | ∫ <b>s</b> ∝                        |
|                         |   | Company        | Microsoft Corporation fe            |
|                         |   | Job Title      | f.                                  |
|                         |   | Business Phone | (213) 806-7300 × f                  |
|                         |   | Home Phone     |                                     |

Update List Item

# 2.4. Lookup Filtering

Lookup filtering greatly enhances default SharePoint's lookup functions. It reduces wait times as lookup results are filtered according to parameters that you set.

As well cascading lookups are now easy to implement using Filter functionality.

| BROWSE EI     | DIT                    |                           |  |           |
|---------------|------------------------|---------------------------|--|-----------|
| Save Cancel   | Paste Cut<br>Clipboard | Attach<br>File<br>Actions | ABC<br>Spelling<br>Spelling  |           |
| Home          |                        | Last                      | Name *   |           |
| Notebook      |                        | First Name                |  |           |
| Documents     |                        |                           | Name   |           |
| Apps in Testi | ing                    | T GIT                     | There is a second s |           |
| Samples       |                        | Cou                       | ntry   | Germany 🔽 |
| Developer Ce  | enter                  | City                      |  | (None)    |
| Recent        |                        | Ema                       | il Address   | Berlin    |
| City          |                        | Erne                      | an a loron coo   |           |
| Country       |                        | Con                       | npany  |           |

#### Lookup Filtering

Filter criteria can be set on **Filter** section of Behaviour tab when some lookup field is selected. CAML Query Builder is accessible when Edit Query button is clicked.

| Enabled             | <i>∫</i> , ≝ In | tial:     |             | f.       | Required:          | f.                             |                 | Se Edit |   | W Edit | <view><query><where><!--</th--><th>Ý</th></where></query></view> | Ý   |
|---------------------|-----------------|-----------|-------------|----------|--------------------|--------------------------------|-----------------|---------|---|--------|--|-----|
| Visible:            | <i>f.</i> 🗟 G   | iculated: |             | f.       | ✓ Validation:      | S.                             |                 | Copy    |   | Copy   |  |     |
|                     |                 |           |             |          | Validation Text:   | f.                             |                 | Paste   |   | Paste  |  |     |
| Control Status      |                 |           | Field Value | -        | Query Editor       |                                |                 |         |   |        |  | - × |
| Home                | Main            |           |             |          |                    |                                |                 |         |   |        |  |     |
| Notebook            | - Heading       |           |             |          | Configure the quer | y used to filter the list view | <i>I.</i>       |         |   |        |  |     |
| Documents           |                 |           |             | Add      | All 💙 of the fol   | llowing conditions evaluat     | e to true:      |         |   |        |  |     |
| Apps in Testing     |                 |           |             |          | City.Country       | Begins With                    | Form Input V Co | ountry  | V |        |  |     |
| Samples             | Rich            | Forms     | Editor - Co | ontacts  | ÷ <                |                                |                 |         |   |        |  |     |
| Developer Center    | Last N          | lame *    | [Last Na    | ame]     | 00                 |                                |                 |         |   |        |  |     |
| Recent              | First 1         | lame      | [First N    | amel     |                    |                                |                 |         |   |        |  |     |
| City                | Full N          |           |             |          |                    |                                |                 |         |   |        |  |     |
| Country             | FUILIN          | ame       | [Full Na    |          |                    |                                |                 |         |   |        |  |     |
| Contacts            | - Coun          | iry:      | (None)      | ~        |                    |                                |                 |         |   |        |  |     |
| skybow Tabbed Pages | Hicity          |           | (None)      | ~        |                    |                                |                 |         |   |        |  |     |
| list3               | Email           | Address   | [Email /    | (ddress) |                    |                                |                 |         |   |        |  |     |
| Site Contents       |                 |           |             |          |                    |                                |                 |         |   |        |  |     |
| Recycle Bin         | Comp            | any       | [Compa      | uny]     |                    |                                |                 |         |   |        |  |     |

Lookup Filtering

# 2.5. Query Editor

Complicate your queries quick and easy with CAML Query Editor.

Lightning Forms app uses a drag and drop interface. You can drag and drop one item, as well as a group with multiple items in it.

| Query Editor<br>Configure the query used to filter the list view.  |       | × |
|--|-------|---|
| All          ✓ of the following conditions evaluate to true:          Country.Title          ✓ Begins With          Form Input          Choose |       |   |
| Any       of the following conditions evaluate to true:         Country.Created By       Equals         Form Input       Choose                |       | × |
| $ \begin{array}{c} (\bullet) \\ (\bullet) \\ (\bullet) \end{array} $   |       |   |
|  |       |   |
|  |       |   |
|  |       |   |
|  |       |   |
|  |       |   |
| Save   | Cance | 4 |

Query Editor

# 2.6. Embed List Form App Part

Rich Forms provides a web part to embed a list form in any web page in your site collection.

| 1 Office 365                                  |  |
|---|--|
| BROWSE  |  |
| S >   | RichFormsTest Subsite Team Blog ProjectSite Community / EDIT LINKS   |
| Home<br>Notebook                              | Add new project  |
| Documents<br>Apps in Testing                  | Title *  |
| Samples<br>Developer Center                   | Description  |
| Recent<br>Ardevia Rich Forms Pro              |  |
| Contacts<br>Company Projects<br>Site Contents | Project Manager (None)   |
| EDIT LINKS                                    | Save Cancel  |
|   | • new item or edit this list   |
|   | All contacts ···· Find an item D   |
|   | Last Name     First Name     Company     Business Phone     Home Phone     Email Address     Dardington # ··· Anne |
|   |  |

Embed List Form Web Part

The app part provides the following configuration options:

Select any list form from any site

Define the ID of the list item to show in edit or display forms Show or hide the ribbon for the form (only for forms customized with Rich Forms) Define fixed height and width of form (only if not customized with Rich Forms) Define where to redirect on successfully saving the form It also provides a link to directly go to customizing the selected list form.

To insert a list form on any page, follow these steps:

### Add Embed List Form app part

Use the SharePoint functionality for adding an app part:

- Select the Embed List Form.
- Click Add to insert it.

| BROWSE PAGE ITEN   | MS LIS   | T INSERT V                    | WEB PART                        |                          |   |  |                            |  |       | 🗘 SHARE | [0]   |
|--|----------|-------------------------------|---------------------------------|--------------------------|---|--|----------------------------|--|-------|---------|-------|
| X  |          | ons E-mail a A<br>lage Link M | Alert Popularity<br>Me + Trends | Approve Reject           | Workflows<br>Workflow   | Edit Mobile<br>Page + Homepa<br>Page Actio | Title Bar<br>ge Properties | Tags &<br>Notes                                      |       |         |       |
| Categories   | F        | Parts                         |                                 |                          |   |  | About th                   | he part  |       |         |       |
| Apps Blog Business Data Community Content Rollup Document Sets Filters Filters Forms | <b>`</b> |                               |                                 | E Port<br>Mice<br>E Port | ExpenseReport1 Form Templates Leave Request MicroFeed Personal Details Projects |  |                            | List Form (Ardevia)<br>mbedding a list form on any p | page. |         |       |
| Upload a Web Part 🔻  |          |                               |                                 |                          |   |  | Add part                   | to: Main 🔽   |       |         |       |
|  |          |                               |                                 |                          |   |  |                            |  | Ad    |         | ancel |

Embed List Form

Configure List Form and App Part Properties In the dropdowns, select the list or library and form to be displayed.

| Select 🗸 |        |               |
|----------|--------|---------------|
| Select 🔽 |        |               |
|          |        |               |
|          |        |               |
|          |        | Apply Refresh |
|          | Select | Select        |

Configure List Form and App Part Properties

Embed List Form web part supports cross-site list selection. To use a list form from another site, set the server-relative URL in the corresponding input.

| Embed List Form (Ardevia)                           | 3   | • 🗆 |
|---|---|-----|
| Form to show<br>O from this site<br>I from any site |   |     |
| URL to form (server-relative)                       | Example: /sites/MySite/Lists/MyList/DispForm.aspx |     |
| Item to show  |   |     |
| ID of List Item                                     |   |     |
| Web part size                                       |   |     |
| Height  | 600   |     |
| Width   | 600   |     |
| Redirect on Success to                              |   |     |
| Hide ribbon   |   |     |
|   | Apply   |     |

Cross Site List Collection

- Set the ID of List Item, if Display or Edit forms are selected.
- Configure the app parts height and width. This will only be available and necessary if the selected form has not been customized using Rich Forms. Forms already customized will resize correctly automatically.
- Set the Redirect on Success to URL where the user should be redirected to after saving.
- If Redirect on Success to property is not set, the page will be refreshed (in case when the list is from the current site) or saving will navigate to the list view page (in case when the list is from another site).

Redirection to external sites is possible for customized forms.

• Uncheck Hide ribbon option, if you want ribbon to be displayed in the form. This only works for forms already customized with Rich Forms.

\* Uncustomized form always contains out of the box form ribbon.

| Embed List Form (Ardevia)  | *                                 |
|--|-----------------------------------|
| Form to show   |                                   |
| <ul> <li>from this site</li> </ul>   |                                   |
| ○ from any site  |                                   |
| List / Library   | Projects 🗸                        |
| Form   | NewForm.aspx                      |
| Web part size  |                                   |
| Height   | 600                               |
| Width  | 600                               |
| Redirect on Success to   |                                   |
| The selected form is not customiz<br>automatically resizing to fit will no<br>Customize form with Ardevia Rich |                                   |
| EDIT   |                                   |
| Save Cancel Paste  | ABC<br>Spelling<br>tions Spelling |
| Title *  |                                   |
| Description  |                                   |
| Project Manager  | Save Cancel                       |

#### Customize List Forms

#### Customize, refresh and save configuration

Clicking on the **Customize form with Lightning Forms** link navigates to the form page in design mode.

Edit the form in the Rich Forms editor Save the changes.

After clicking the **Refresh** button the customized form will be displayed.

Clicking on the **Apply** button saves the configuration in the app part's properties.

| Embed List Form (Ardevia)  |                          | ÷_[           |  |
|--|--------------------------|---------------|--|
| Form to show<br><ul> <li>from this site</li> <li>from any site</li> <li>List / Library</li> <li>Form</li> </ul> Redirect on Success to <ul> <li>Hide ribbon</li> </ul> | Projects<br>NewForm.aspx | Apply Refresh |  |
| Title * Description Project Manager  |                          | Save Cancel   |  |

### 3. Tutorials