



Kaldeera Advanced Forms 2009

User's guide

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## Kaldeera Advanced Forms

Kaldeera Advanced Forms (KAF) is a tool that allows you to **modify the standard SharePoint® forms** and to create powerful web form-based applications. Hide fields, display non-editable fields grouping and display the information in a more intuitive adding static text, images, Web Parts.

With KAF you will achieve the results you expect **without additional development costs** through its technology based on the application of rules. No need to buy multiple solutions and components. Get **all the functionality in one product!**



### **Custom forms**

Modify SharePoint forms as you needed is now possible. Immediate results!



### **No .Net knowledge required**

Reduced cost of development. Ability to combine and reuse existing systems.



### **Create powerful forms-based applications**

Web forms based applications without requiring custom development.



### **Easy to use**

Ideal tool for business users

## Features

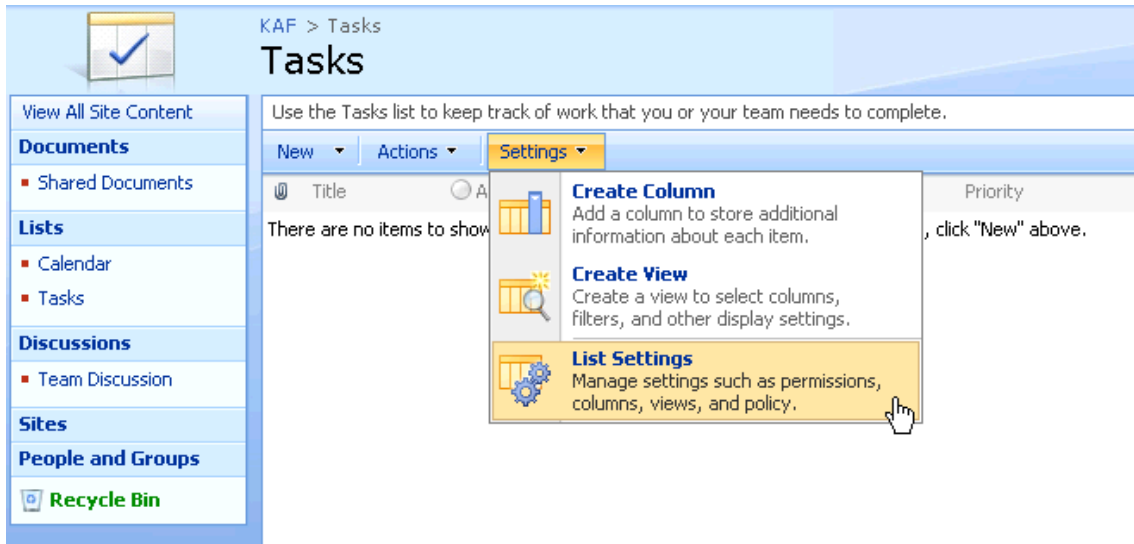


- Edition of the standard SharePoint list forms (**new/edit/display**).
- **Multiple form definitions** for the same list
- Multiple **application rules** based on:
  - The user who access the element
  - The values of element
  - The user profile properties
  - The security groups to which the user belongs
  - Page parameters
  
- **Modify the forms layout** allowing to introduce the following elements:
  - Text and HTML content
  - Images
  - WebParts
  
- Grouping of areas through tabs
- Column protection (view/edit)
- Content type definitions
- Minimal installation and configuration.
- Supports any farm architecture of Microsoft SharePoint
- 100% Microsoft SharePoint technology based.
- Total integration with MOSS 2007 + WSS 3.0

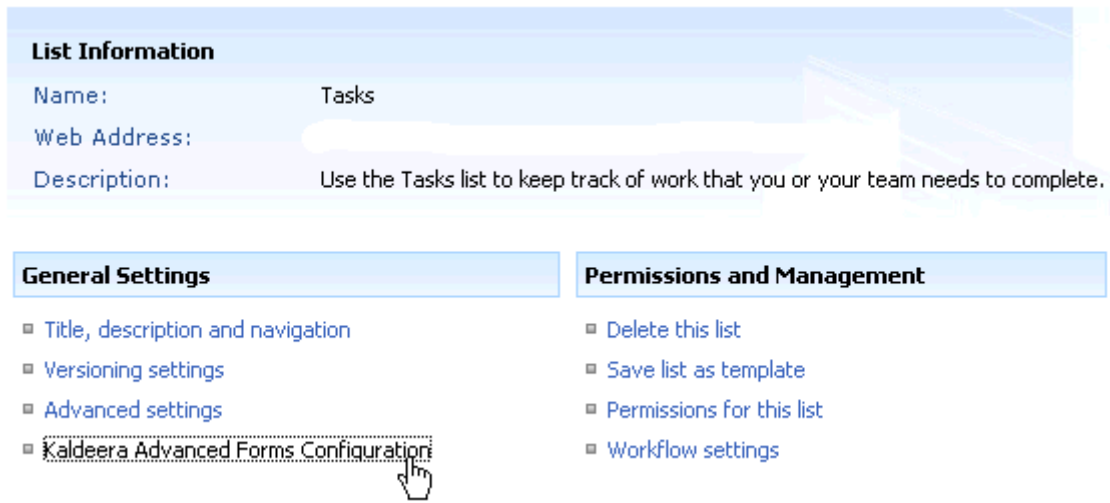
## Using Kaldeera Advanced Forms

### Accessing settings page

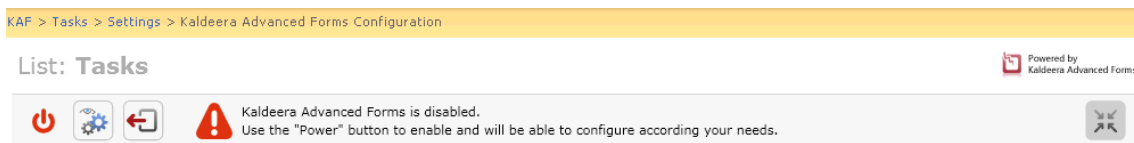
First navigate to a list or document library and click “Settings”.



Select “List Setup”. The list setup page will load. Click on “Kaldeera Advanced Forms Configuration” link under column “General settings”.

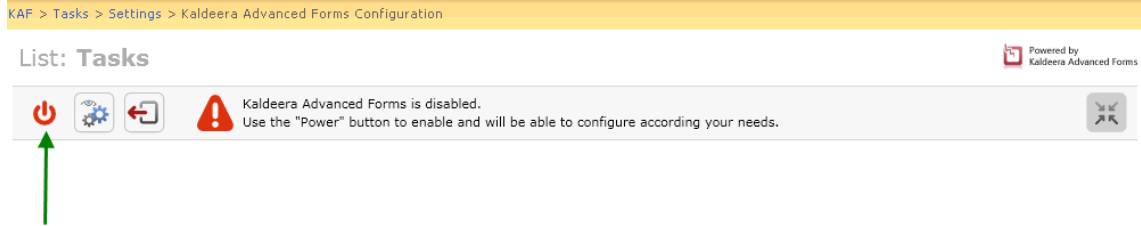


Once the link has been selected, Kaldeera Advanced Forms will load.

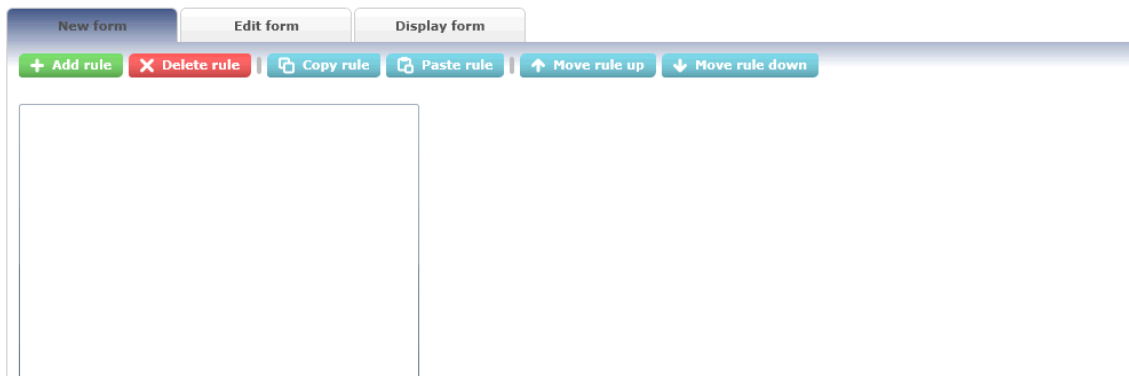


## Enabling or disabling Kaldeera Advanced Forms functionality

Click on the “Power” button to enable Kaldeera Advanced Forms functionality on a list or documents library from the editor.



Once enabled conditions and fields editor will be displayed.



To disable Kaldeera Advanced Forms functionality simple click again the “Power” button.

### **Saving settings**

Once you configured Kaldeera Advanced Forms for a list, you can save the settings by clicking in the save button.



### **Import/Export settings**

Kaldeera Advanced Forms can export the current configuration for a list to a file. To do it click in the export button and save the file into a directory.



To import a configuration setting from a file into the current configuration click the import button and select the file.



## Configuring Kaldeera Advanced Forms for a list

### Setting fields to display

Before creating rules with conditions and establishing lists fields to be displayed on a form, the view from the lists' item to be set has to be selected.

A list's item has three views:

- **New:** view displayed when user creates a new item on the list. Usually by clicking "create" from the list.
- **Display:** view displayed when user selects and item previously created to see its fields.  
**Edit:** view displayed to edit an already created item's fields.

Item's views examples:

- **New**

**Tasks: New Item**

Attach File \* indicates a required field

**Title \***

**Priority** (2) Normal

**Status** Not Started

**% Complete**  %

**Assigned To**

**Description**

**Start Date** 2/24/2010

**Due Date**

OK Cancel



## Selecting the view

On the top side of the editor three tabs are displayed with the three different item's views.

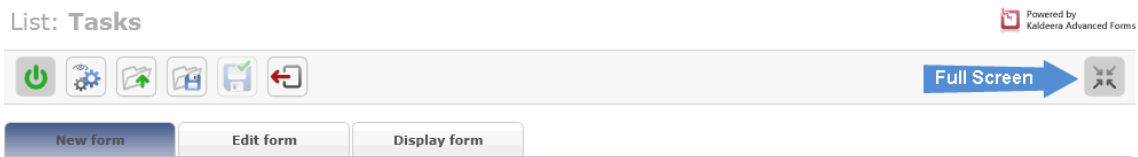


Select the view to be set. Unset views will display default SharePoint fields.

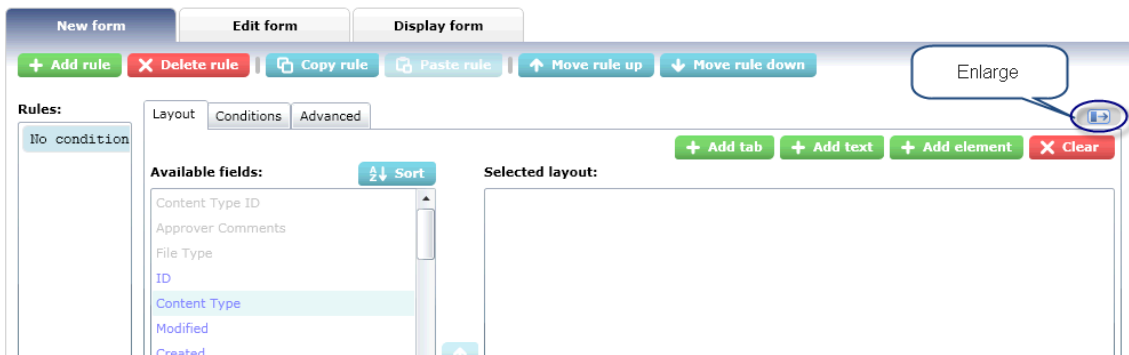
Remember to copy the rule/s from view to view if you want to display the same item's fields for more than one view.

## Editing option

“Full screen” button expands the overall size of the editor to full screen.



The editing area maximize button enlarges the size of the setting and fields editing area for an ease of use.

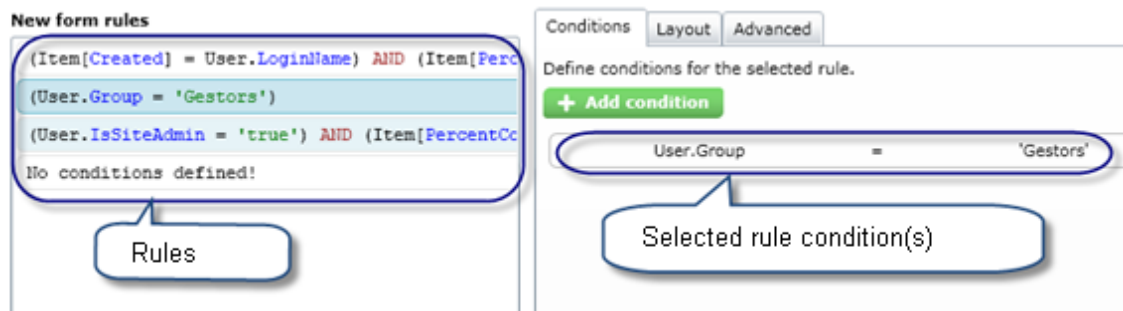


## Rules

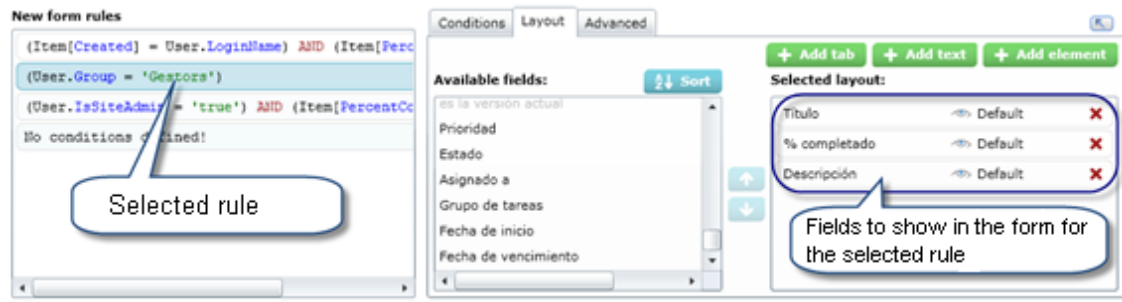
With Kaldeera Advanced Forms items' fields are displayed on the form according to a set of rules set by the administrator.

For example:

- If user belongs to the "Managers" group then display "Title" and "Description" fields
- If the item has "Project Status" field set as "closed" then display "Title", "Description" and "Status" fields.
- On the rest of cases, displayed "Title" field only.



Advanced Forms Kaldeera assesses the conditions established for each rule from top to bottom. If the rule condition is met (or if all conditions are met if there are several of them), the established fields for that rule will be displayed. The rest of the rules will not be evaluated.

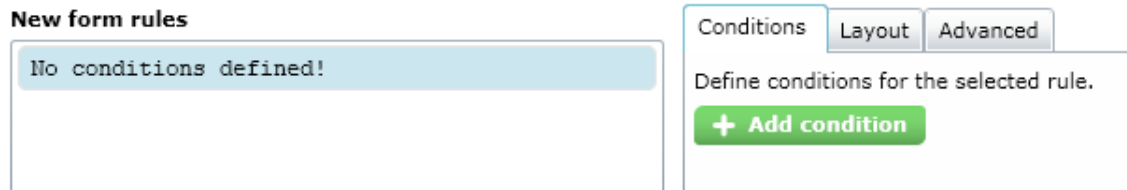


## Adding rules

When setting a view, the first thing to be done is add “rule”. Click the “add rule” button.



When adding a new rule, the conditions and fields editor side will be activated.



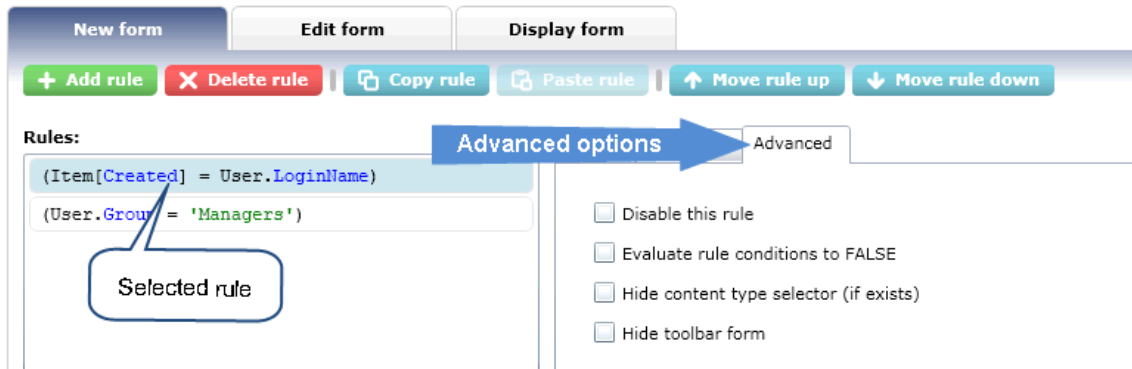
If you want a group of fields to display always, go directly to the fields editing section of this manual, without adding a rule, to set the fields to be displayed on the form.

## Order of rules

The order of the rules is important because if the conditions of a rule are met the rest of the rules are not evaluated. If a user meets the conditions of several rules, only the fields of the first one whose conditions are met will be display.

## Advanced rules options

On “Advanced” tab from the editor you can set some special option of the selected rule.

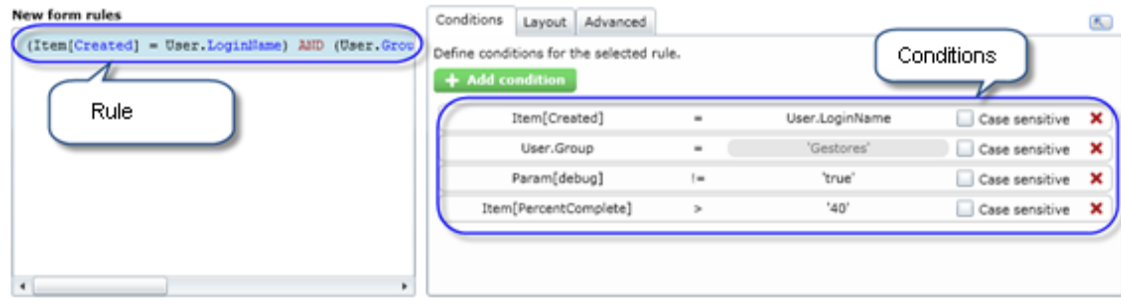


- The option “Disable this rule” disables the rule. The selected rule will not be taken into account when evaluating the rules to determine which fields are displayed. This option is used during the setting for testing and when wanting to disable a part without having to delete it altogether.
- The option “Evaluate rule conditions to FALSE” reverses the result of the evaluation of the rule. That is, if the evaluation of the conditions is false, the end result will be “true” and the other way around. The resulting reversal is done after evaluating all the conditions rather than each condition of the rule separately.
- The option “Hide content type selector” hides the field “content type” when creating or editing lists with several content types.
- The option “Hide toolbar form” hides the SharePoint toolbar with the “New”, “Edit” and other options, to prevent the user from using them.

## Conditions of a rule

The conditions of a rule are the logical expression Kaldeera Advanced Forms will evaluate to determine which fields to visualize on the form.

A rule can have several conditions. (E.g. A user to be in the administrators group and the author of the item).

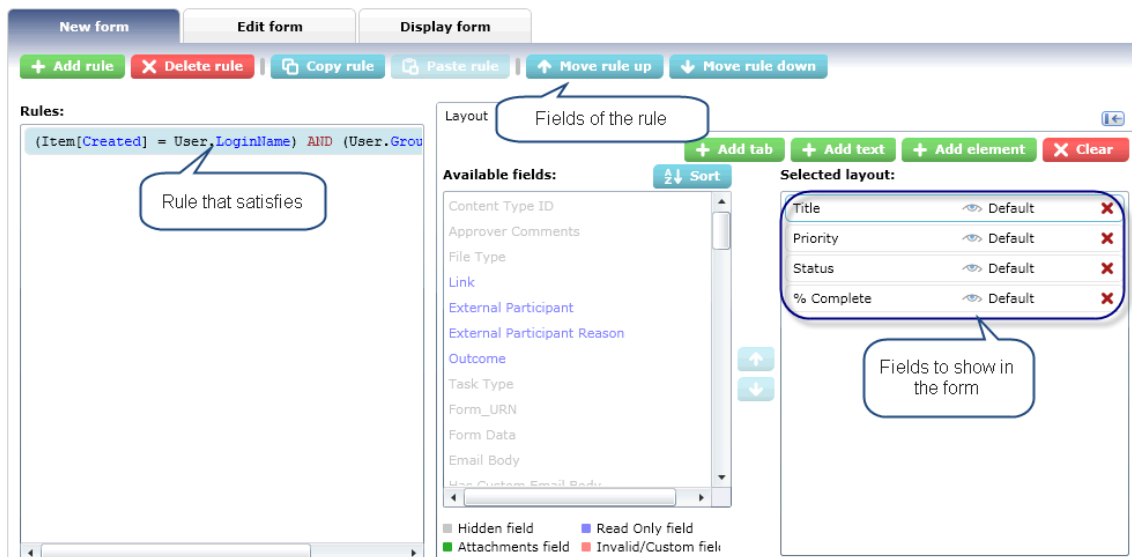


The result of the condition can only be true if the conditions are met and false if they are not met.

If the evaluation of the condition is true then the fields established by that rule will be displayed on the form.

If the rule has several conditions, *all of them* must be met in order for the fields of that rule to be displayed.

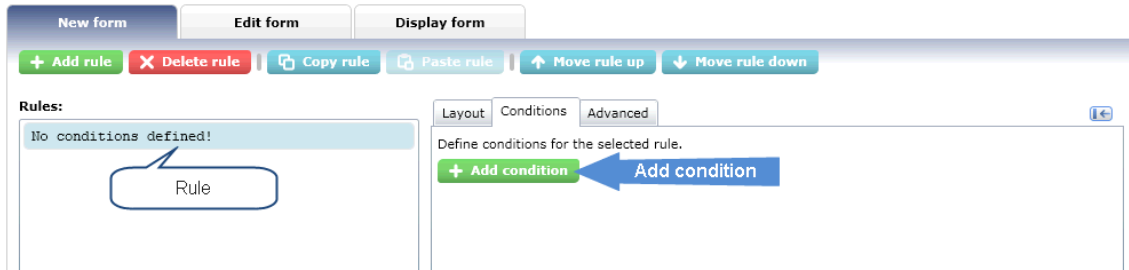
If the rule has no conditions, that rule will always be executed. Rules without conditions should be left at the end, after other rules, in case none of the previous ones are met.



To know how to establish the fields to be displayed for a rule go to section “displayable fields for a rule” of this manual.

## Adding conditions to a rule

To add a condition to a rule, click on the “Add condition” button.



The first condition of the rule being edited will be displayed.



A condition has two parameters or operands and one operator.

For example:

- A = B
- A > 3

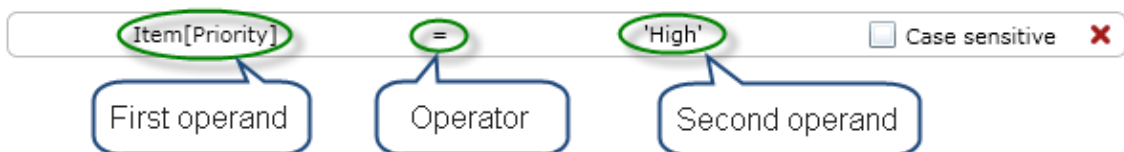
“A”, “B” and “3” are parameters or operands.

“=”, “>” are operators.

The result of the condition can only be true if the condition is met and false if it is not met.

If the evaluation of the conditions is true, the fields established by that rule will be displayed, or in case several conditions are established for that rule the following condition will be evaluated.

An established condition will be displayed on the editor as follows:

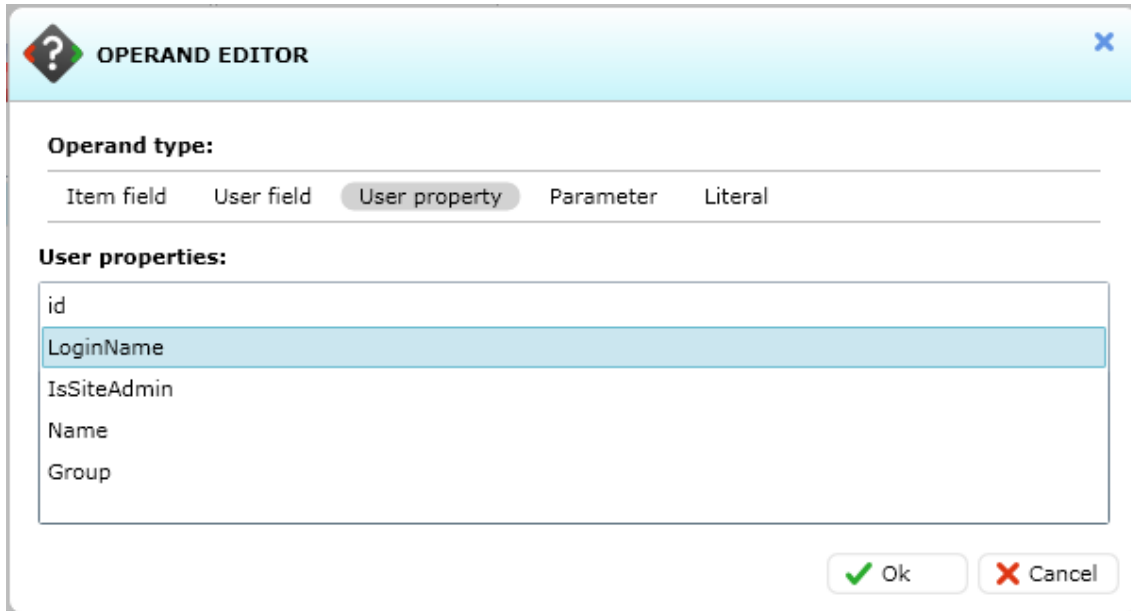


## Editing a condition

To establish operands of a condition click on the quotation marks icons:



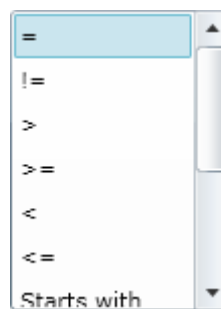
A new window will open on which we could choose one of the two parameters of the condition.



To establish the operand of a condition click on the condition's "="



A list with possible operands will be displayed.



## Deleting a condition

To delete a condition of a rule click on the **X** icon to the left of the rule.



## Parameters of a condition

On the operands' window you can choose different types of operands for the condition. The possible types are:

- **Item field:** represents the value of a field of the current item. For example, the field “status” of the item.
- **User field:** represents the value of a field of the current user. Taken from the fields of a list of SharePoint users for the current user.
- **User property:** represents data that cannot be obtained from the list of SharePoint users, like security groups for the current user or permission level
- **Parameter:** represents a variable in the URL of the navigation page.
- **Literal:** represents a string. *This is the default option.*

## Operators of a condition

The possible operators of a condition are:

- =
- !=
- <
- >
- <=
- >=
- Starts with
- Not starts with
- Ends with
- Not ends with
- Contains
- Not contains

The operators <, >, <= and >= are exclusively for math and date comparisons.

The operators “Starts with”, “Not starts with”, “Ends with”, “Not ends with”, “Contains” y “Not contains” are exclusively for text strings comparisons.

## Conditions examples

- **Example 1:**

Item[Created] = 'kaldeera\jlopez'  Case sensitive 

Type of first operand: "Item field".

Type of second operand: "Literal".

Operator: "="

This condition is met if the author of the item (the user which created the item) is 'kaldeera\jlopez'.

- **Example 2:**

Item[Created] = User.LoginName  Case sensitive 

Type of first operand: "Item field".

Type of second operand: "User property".

Operator: "="

This condition is met if the author of the item (the user which created the item) is the current user.

- **Example 3:**

Item[PercentComplete] > '40'  Case sensitive 

Type of first operand: "Item field".

Type of second operand: "Literal".

Operator: ">"

This condition is met if the field "% completed" of the item is higher than 40.

- **Example 4:**

User.Group != 'Managers'  Case sensitive 

Type of first operand: "User property".

Type of second operand: "Literal".

Operator: "!="

This condition is met if current user does *not* belong to the "Managers" group.

- **Example 5:**

User[Department] = 'Accounts'  Case sensitive 

Type of first operand: "User field".

Type of second operand: "Literal".

Operator: "="

This condition is met if the field "Department" of the current user is established to "Accounts".

## Advanced options for conditions

You can establish the condition to be case sensitive or not when comparing operands of a string.

By default, Kaldeera Advanced Forms is not case sensitive when comparing strings.

For example:

David Smith = david smith

To enable the differentiation between upper and lower cases, activate the box “Case sensitive” to the right of the condition.



In this case:

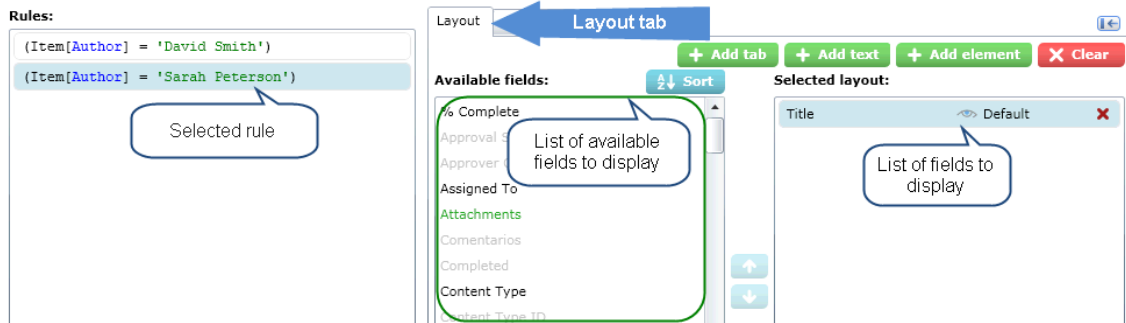
- David Smith != david smith
- David Smith = David Smith

To activate the box “Case sensitive” for comparisons different to the string type this will have no effect over the assessment of the condition.

## Displayable fields for a rule

Once a rule and its conditions are created, we have to set the fields of the item to be displayed in the event the conditions are met.

To do this, select the rule you want to edit and go to the “Layout” tab on the right hand side of the editor.



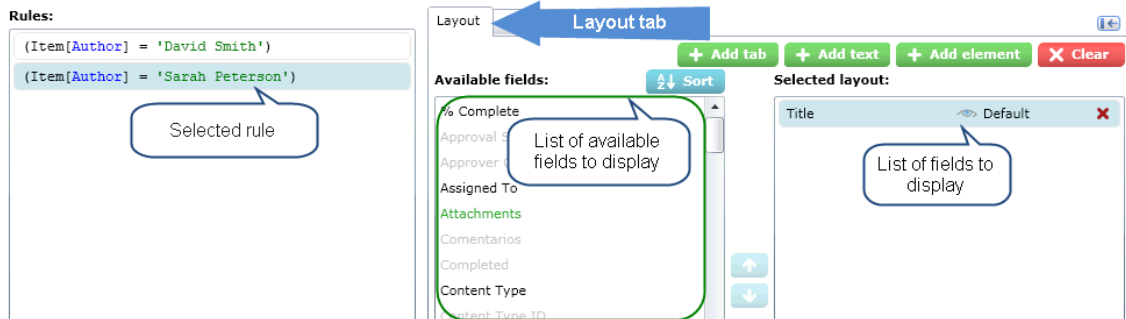
On the “Layout” tab, under the title “Available fields” you will find a list of the available fields to display for that item.

The fields displayed in black are normal fields of the item or ones created by the user. The fields displayed in grey are hidden fields of the item that would not show in the normal view of the item (without Kaldeera Advanced Forms). Some of these fields may not be displayed even when selected to do so because they are hidden fields of the system.

“Sort” button  allows sorting fields alphabetically.

### Adding displayable fields to a rule

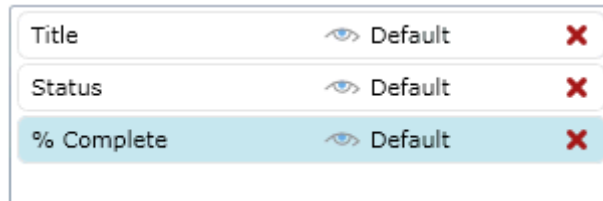
To add a field to be displayed on the view, select “Layout” tab and click on the field you want to display from the list of available fields. The selected field will then go down the list of fields to be displayed.



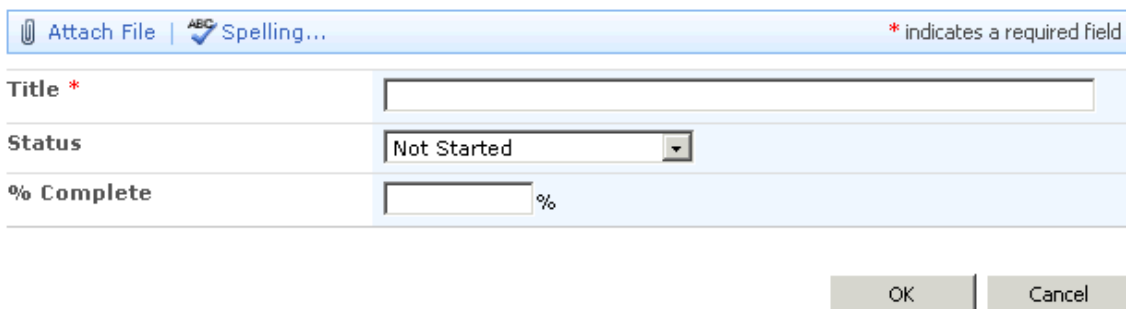
The fields will be displayed in the same order as they are on the list. To change the order of the fields use the up and down arrow buttons.



For example, if the following fields are chosen to be displayed.

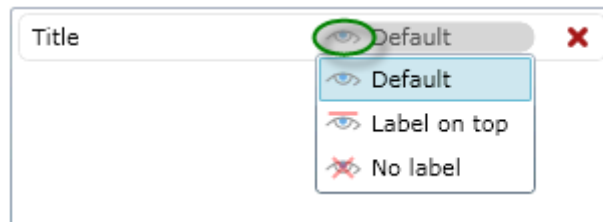


The view of the item will be displayed as follows:



## Displayable fields options for a rule

The image of an eye to the right of a field allows to select the way that field will be displayed.



- In normal mode (“Default”) the field will be displayed as it is on SharePoint by default.

**Title \***

- In “label on top” mode, the field name will be displayed over the control of the field.
- In “no label” mode the control of the field will be displayed without its name.


## Deleting displayable fields of a rule

To delete a field from the list of fields to be displayed, click on the **X** icon to the right of the field.

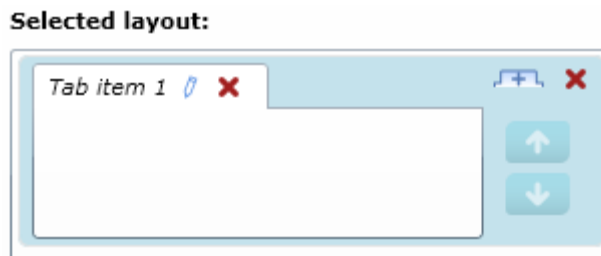


## Sorting displayable fields by tabs


If you have many fields to display in the view of the item it can be convenient to sort them by sections or tabs.

To add a section of tabs click  button on the list of fields from the fields to display.


In the list of fields to display there will be a view of the section:



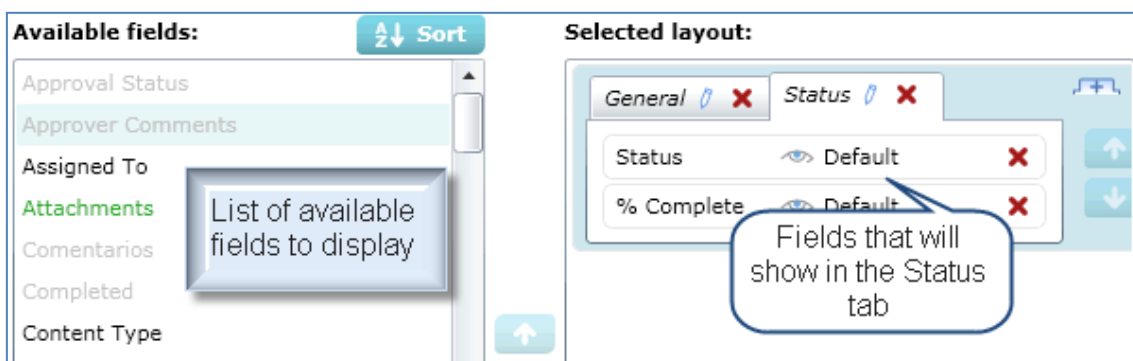
To edit the text from the tab, double-click the text or click on the pencil icon .

To delete a tab, click on the  icon of the tab.

To add new tabs, click on the  icon to the right of the tabs zone.

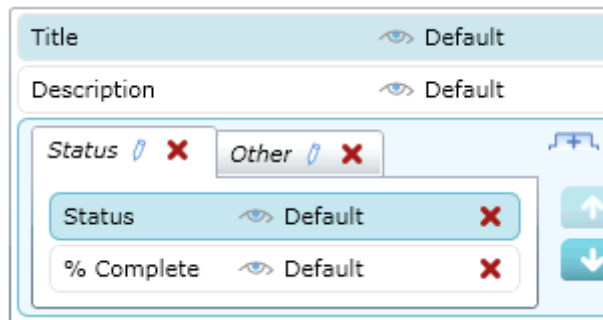
To delete the whole tabs section, click on the  icon to the right of the tabs zone.

Once the tabs to display in the view of the item are created, the fields to display on each tab have to be added. Select the tab to edit and click on the fields from the field list to add them to display.

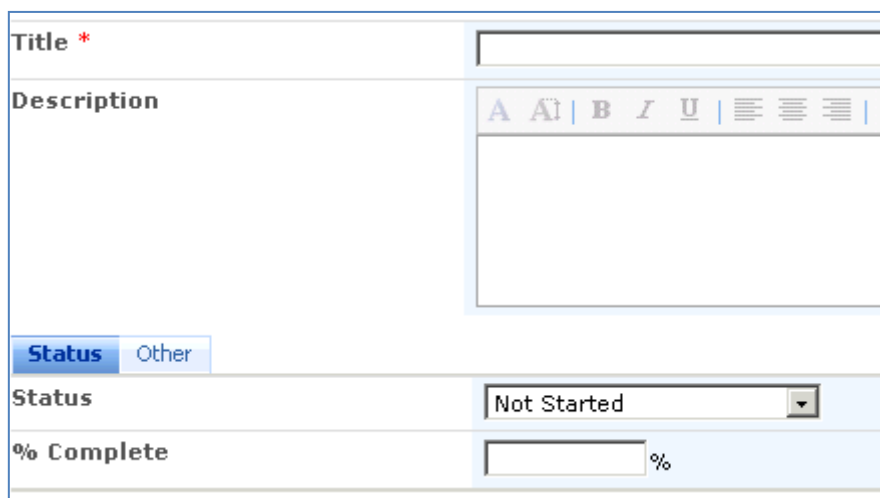


You can combine to display some of the fields of the item normally and the others by tab sections.

For example, a list of fields set this way:



Would display the items as follows:



You can add tab sections within other tab sections.

## Adding texts to the displayable fields lists

Sometimes it can be necessary to add text between the lists of fields.

The screenshot shows a form editor interface with three main sections: **General data**, **Task status**, and **Other**. Under **General data**, there are fields for **Title \*** and **Assigned To**. Under **Task status**, there is a **Status** dropdown menu set to "Not Started" and a **% Complete** input field. Under **Other**, there is a **Description** field with a rich text editor toolbar above it.

To add sections of text between the lists of fields click on “Add text” button.

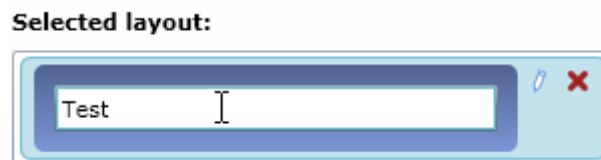


This will add a section of text as if it were another field. It can be sorted up and down like any field.

By clicking on the button a field will be displayed as follows:



Double-clicking on the blue area or the pencil icon you can edit the text to be displayed in the text section.



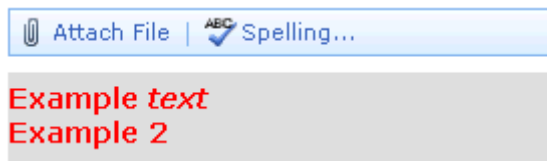
By clicking on the **X** icon you will delete the field of text from the list of fields to display.

If you want to display a text with a certain style, you can include html code in the field of the text to give it the desired format.

For example, an html code as follows:

```
<span style="color:Red;font-size:14px;">Example <i>text</i><br/>Example 2</span>
```

Put on a single line and inserted in a field of text, it would read as follows:



*The html code inserted in a field of text must be properly formed html text, with all tags properly closed and the properties of the tags in quotation marks, like XML or XHTML text.*

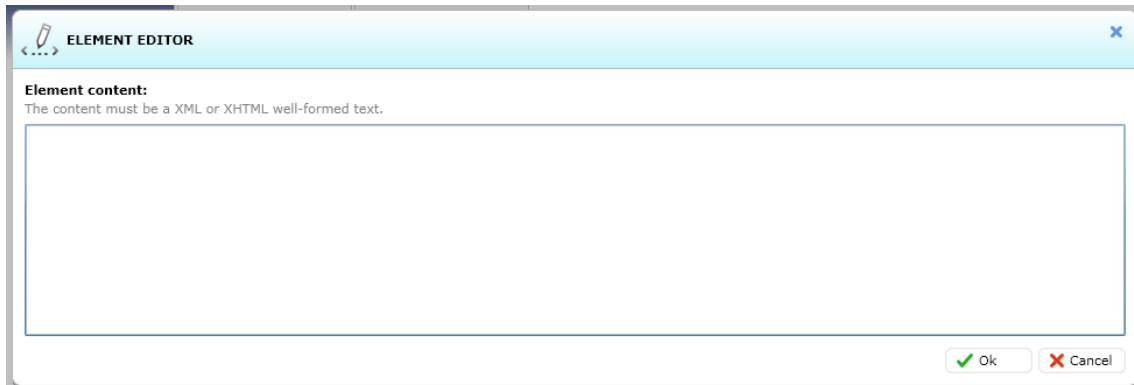
You can combine the standard fields of the item, text fields, tabs and fields sections of elements in any order.

## Adding images and html code

In case you want to add images or html code to the view of the item, you must use the button



Clicking the button will prompt out a text editor where you can insert html code



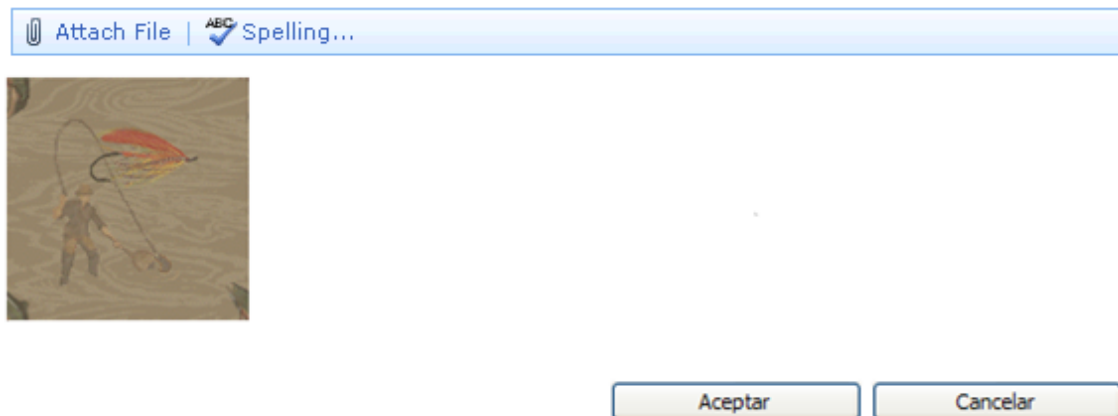
*In the editor the valid html code must be properly inserted like XML or XHTML text.*

If you insert html code to display an image, such as:

```

```

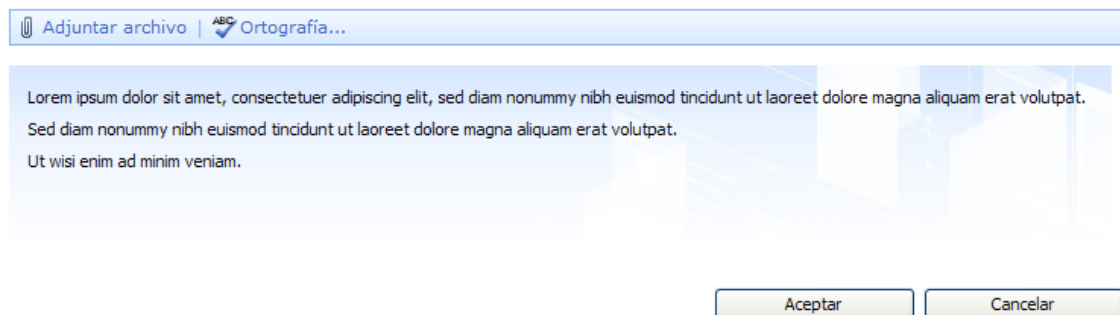
The image will be display like this:



If you insert html code (XHTML) as follows:

```
<table class="ms-pageinformation" cellpadding="0" cellspacing="0" width="100%">
  <tr>
    <td style="padding:10px 10px 10px 10px;background-repeat:repeat-x;" valign="top" width="100%">
      <table class="IdItemHoverTable" cellpadding="0" cellspacing="2" width="100%">
        <tr>
          <td valign="top">Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.</td>
        </tr>
        <tr>
          <td>Sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.</td>
        </tr>
        <tr>
          <td>Ut wisi enim ad minim veniam.</td>
        </tr>
      </table>
    </td>
  </tr>
</table>
```

The view of the item will be displayed like this:



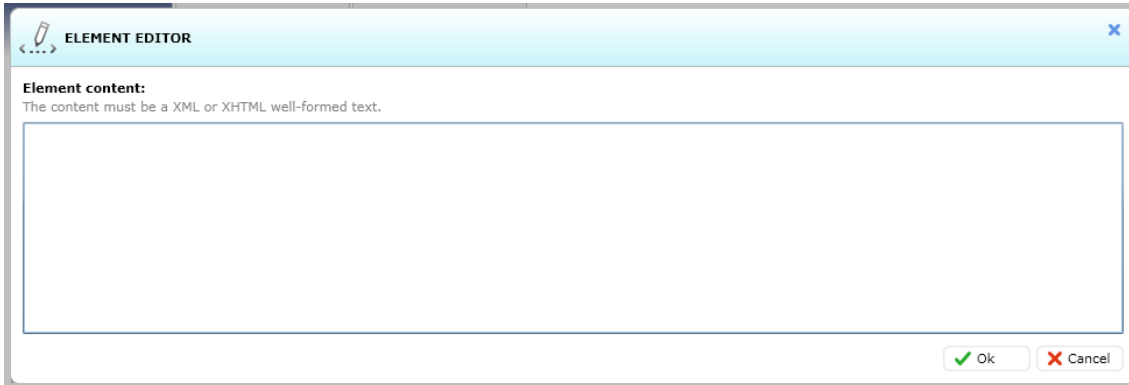
You can combine the standard fields of the item, text fields, tabs and fields sections of elements in any order.

## Adding WebParts

In case you want to add images or html code to the view of the item, you must use the button

 + Add element

Clicking the button will prompt out a text editor where you can insert html code



Open the exported web Part file (.webpart or .dwp) and copy the xml code into the editor.

```
<WebPart xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema"
  <Title>Kaldeera YearCalendar webpart</Title>
  <FrameType>Default</FrameType>
  <Description>Kaldeera YearCaldenar WebPart.</Description>
  <IsIncluded>true</IsIncluded>
  <ZoneID>Left</ZoneID>
  <PartOrder>0</PartOrder>
  <FrameState>Normal</FrameState>
  <AllowRemove>true</AllowRemove>
  <AllowZoneChange>true</AllowZoneChange>
  <AllowMinimize>true</AllowMinimize>
  <AllowConnect>true</AllowConnect>
  <AllowEdit>true</AllowEdit>
  <AllowHide>true</AllowHide>
  <IsVisible>true</IsVisible>
  <HelpMode>Modeless</HelpMode>
  <MissingAssembly>Cannot import this Web Part.</MissingAssembly>
  <PartImageLarge />
  <IsIncludedFilter />
  <GridCols xmlns="Kaldeera.WebParts">4</GridCols>
  <ListName xmlns="Kaldeera.WebParts">/Calendar</ListName>
  <CssFile xmlns="Kaldeera.WebParts">/KaldeeraStyles/CalendarWP.css</CssFile>
</WebPart>
```

The view of the web Part will be displayed like this:

📎 Attach File | ✖ Delete Item | ABC Spelling... \* indicates a required field

<b>Content Type</b>	<input type="text" value="Task"/> Track a work item that you or your team needs to complete.
<b>Title *</b>	<input type="text" value="Task example"/>
<b>Status</b>	<input type="text" value="In Progress"/>
<b>% Complete</b>	<input type="text" value="20"/> %

← **2010** →

January							February							March							April						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2	31	1	2	3	4	5	6	28	1	2	3	4	5	6	26	29	30	31	1	2	3
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13	4	5	6	7	8	9	10
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20	11	12	13	14	15	16	17
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27	18	19	20	21	22	23	24
24	25	26	27	28	29	30	28	1	2	3	4	5	6	28	29	30	31	1	2	3	25	26	27	28	29	30	1
31	1	2	3	4	5	6	7	8	9	10	11	12	13	4	5	6	7	8	9	10	6	7	8	9	10	11	12
														WebPart													
May							June							July							August						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1	30	31	1	2	3	4	5	27	28	29	30	1	2	3	25	26	27	28	29	30	31
2	3	4	5	6	7	8	6	7	8	9	10	11	12	4	5	6	7	8	9	10	1	2	3	4	5	6	7
9	10	11	12	13	14	15	13	14	15	16	17	18	19	11	12	13	14	15	16	17	8	9	10	11	12	13	14
16	17	18	19	20	21	22	20	21	22	23	24	25	26	18	19	20	21	22	23	24	15	16	17	18	19	20	21
23	24	25	26	27	28	29	27	28	29	30	1	2	3	25	26	27	28	29	30	31	22	23	24	25	26	27	28
30	31	1	2	3	4	5	4	5	6	7	8	9	10	1	2	3	4	5	6	7	29	30	31	1	2	3	4

## Using Kaldeera Advanced Forms for a content type

Kaldeera Advanced Forms can be configured to apply to a whole content type instead of a single list.

The forms configured with Kaldeera Advanced Forms for a content type will show all the lists with the content type or an inherited content type applied.

In case a list or an inherited content type has its own configured form, Kaldeera Advanced Form will show the list configuration or most inherited content type configuration.

### Accessing settings page

First navigate to the content type page settings. Click on “Kaldeera Advanced Forms Configuration” link.

## Site Content Type: Page

**Site Content Type Information**

Name: Page

Description: Page is a system content type template created by the Publishing Resources feature. Libraries created by the Publishing feature.

Parent: System Page

Group: Publishing Content Types

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**Settings**

- Name, description, and group
- Advanced settings
- Workflow settings
- Delete this site content type
- Document Information Panel settings
- Information management policy settings
- **Kaldeera Advanced Forms Configuration**

Once the link has been selected, Kaldeera Advanced Forms will load.

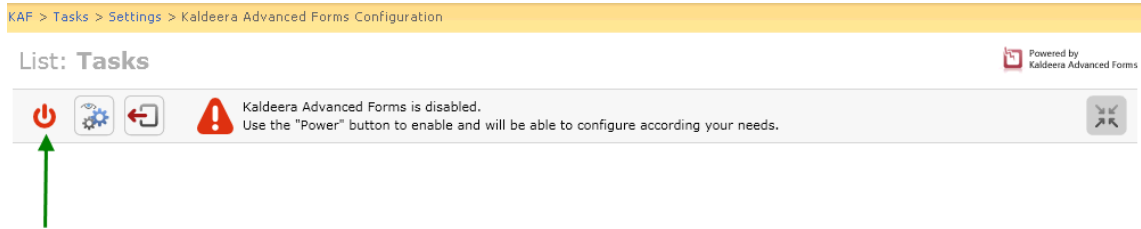
KAF > Tasks > Settings > Kaldeera Advanced Forms Configuration

List: **Tasks** Powered by Kaldeera Advanced Forms

    Kaldeera Advanced Forms is disabled. Use the "Power" button to enable and will be able to configure according your needs. 

## Enabling or disabling Kaldeera Advanced Forms functionality

Click on the “Power” button to enable Kaldeera Advanced Forms functionality on content type editor.



Once enabled conditions and fields editor will be displayed.



To disable Kaldeera Advanced Forms functionality simple click again the “Power” button.

## Configuring Kaldeera Advanced Forms for a content type

To configure a form for a content type use the same rules as for configuring a form for a list.

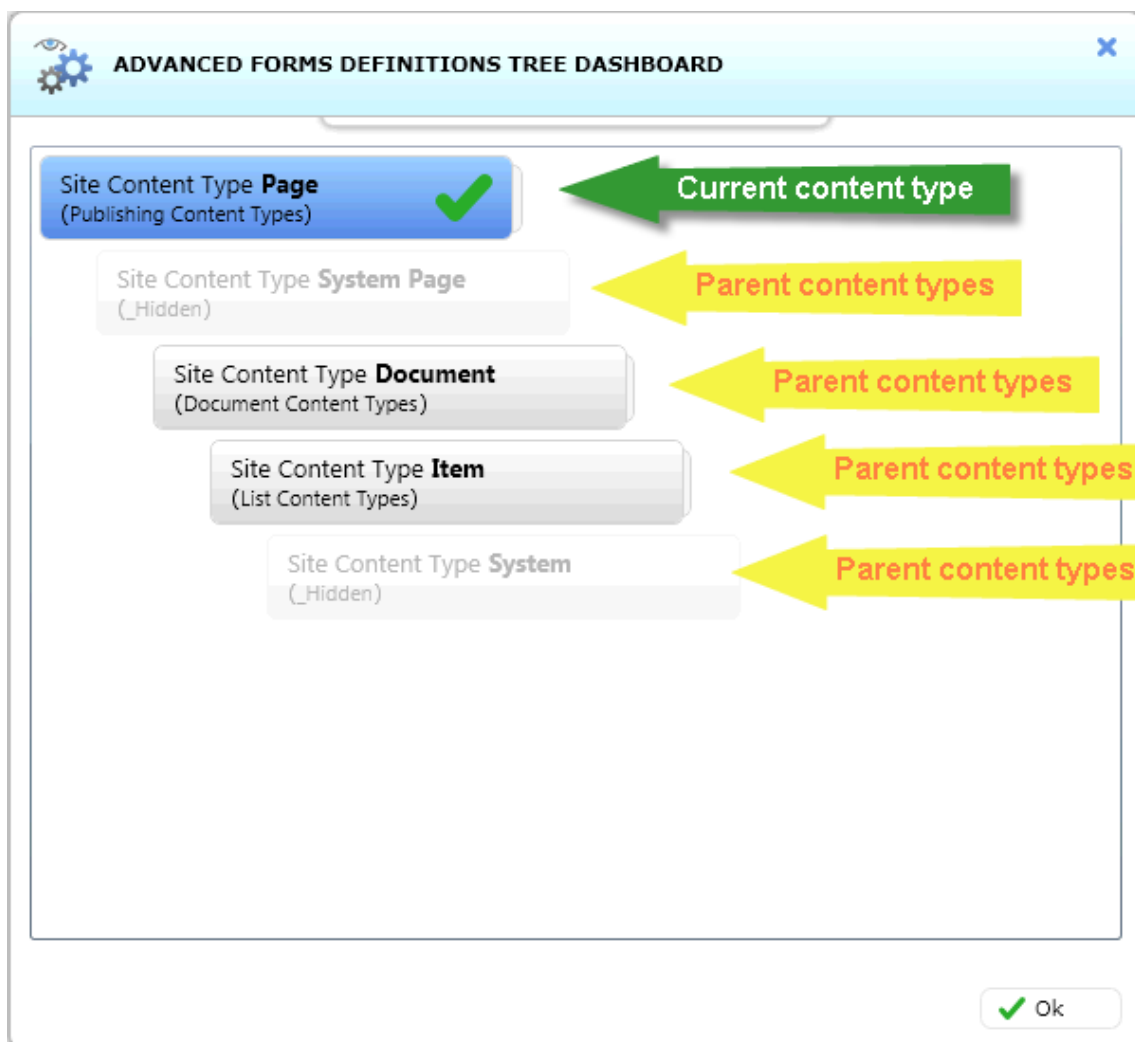
See “Configuring Kaldeera Advanced Forms for a list”.

## Manage Kaldeera Advanced Forms for a content type

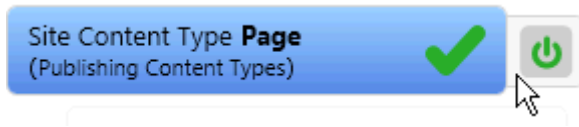
Clicking in the “Show Advanced Forms definition tree”



will show a structure of the current content type or list and the parent content type of which inherits.



From this panel it's possible to enable/disable the functionality of Kaldeera Advanced Forms for the different content types/list showed in the panel by clicking in the "power" button in the side of the content type.



### Manage Kaldeera Advanced Forms for different content types

The toolbar for the non-current content type/list includes a button to edit the settings for other content types and to import a definition from other content types.



Clicking in the "edit settings" button will open a new internet explorer window to edit the Kaldeera Advanced Forms settings for the content type/list selected.