SharePoint 2013: Building Custom Forms

Description

In this article I am going to walk through the process of building custom forms using SharePoint Designer 2013. We are going to create three separate forms for a custom list. First a custom new item form, second a display item form and finally an edit item form.

Setting the Scene

I have created a custom list called **Request Form** which a student will fill to submit an event request. The counselor will use the edit item form and either approve or deny the request.

Building the List

Below is a screenshot of the columns created in the custom list.

Column (click to edit)	Type	Required
Title	Single line of text	✓
Student Name	Single line of text	✓
Student Comment	Multiple lines of text	
Student Date Request	Date and Time	✓
Counselor Name	Single line of text	✓
Counselor Comment	Multiple lines of text	
Counselor Date	Date and Time	
Approved By Counselor	Choice	
Event Type	Choice	✓
New Event Description	Multiple lines of text	
Previous Event Description	Multiple lines of text	
Address Line 1	Single line of text	✓
Address Line 2	Single line of text	
City	Single line of text	✓
State	Choice	✓
Zip Code	Single line of text	
Phone Number	Single line of text	✓
Fax Number	Single line of text	
Email Address	Single line of text	✓
Current Status	Choice	
Modified	Date and Time	
Created	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	

The columns I have shown above are self-explanatory, however, I am going to provide the choices I have added to the Choice column. The default value of the below choice columns are blank.

Approved By Counselor

Name and Type	Column name:		
Type a name for this column.	Approved By Counselor		
	The type of information in this column is:		
	Single line of text		
	Multiple lines of text		
	Choice (menu to choose from)		
	Number (1, 1.0, 100)Currency (\$, ¥, €)		
	O Date and Time		
Additional Column Settings	Description:		
Specify detailed options for the type of information you selected.			
	Require that this column contains information:		
	○ Yes ● No		
	Enforce unique values:		
	○ Yes ● No		
	Type each choice on a separate line:		
	Approved Denied		
	Display choices using:		
	Drop-Down Menu		
	O Radio Buttons		
	Checkboxes (allow multiple selections)		

Event Type

Name and Type	Column name:
Type a name for this column.	Event Type
	The type of information in this column is:
	○ Single line of text
	Multiple lines of text
	 Choice (menu to choose from)
	O Number (1, 1.0, 100)
	Currency (\$, ¥, €)
	O Date and Time
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Additional Column Settings	Description:
Specify detailed options for the type of information you selected.	
	Require that this column contains information:
	● Yes ○ No
	Enforce unique values:
	○ Yes ● No
	Type each choice on a separate line:
	New Event Previous Event
	Display choices using:
	Drop-Down Menu
	O Radio Buttons
	O Checkboxes (allow multiple selections)

State

Name and Type	Column name:	
Type a name for this column.	State	
	The type of information in this column is:	
	○ Single line of text	
	Multiple lines of text	
	 Choice (menu to choose from) 	
	O Number (1, 1.0, 100)	
	O Currency (\$, ¥, €)	
	O Date and Time	
Additional Column Settings	Description:	
Specify detailed options for the type of information you selected.		
	Require that this column contains information:	
	Yes ○ No	
	Enforce unique values:	
	○ Yes ● No	
	Type each choice on a separate line:	
	Alabama	^
	Alaska Arizona	
	Arkansas	
	California	
	Display choices using:	
	Drop-Down Menu	
	Radio Buttons	
	O Checkboxes (allow multiple selections)	

Current Status

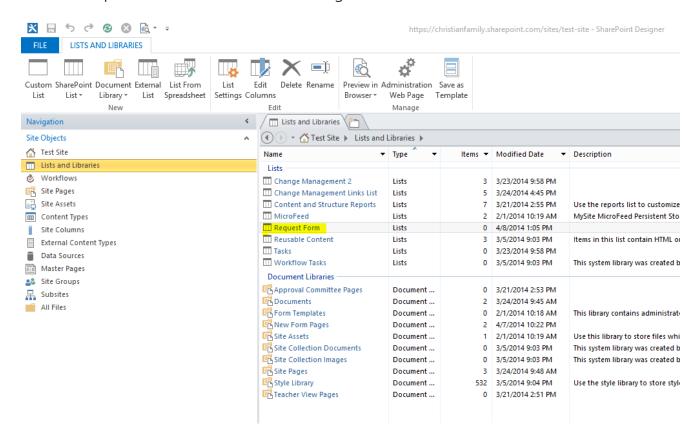
Name and Type	Column name:
Type a name for this column.	Current Status
	The type of information in this column is:
	○ Single line of text
	Multiple lines of text
	 Choice (menu to choose from)
	O Number (1, 1.0, 100)
	O Currency (\$, ¥, €)
	O Date and Time
Additional Column Settings	Description:
Specify detailed options for the type of nformation you selected.	Description
	Require that this column contains information:
	○ Yes ● No
	Enforce unique values:
	○ Yes ● No
	Type each choice on a separate line:
	Waiting on Counselor Completed
	Display choices using:
	Drop-Down Menu
	O Radio Buttons
	Checkboxes (allow multiple selections)

Building the Form

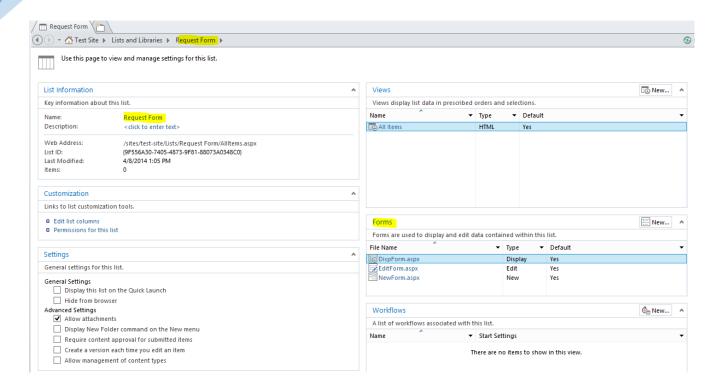
This section describes the process of building custom new, display and edit forms using SharePoint Designer 2013.

New Item Form

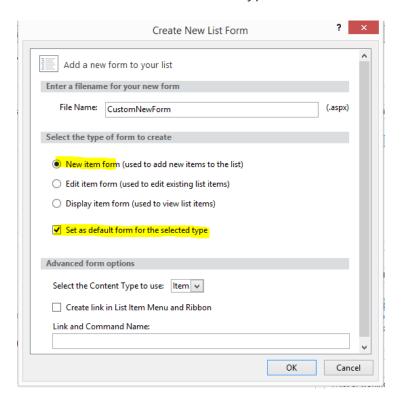
Below is a screenshot of what SharePoint Designer 2013 looks like when I have opened the site. Request Form is the list I am focusing on.



Below are the settings of the list. We are going to use the Forms section to build the custom forms.



Click on the Form's New button and fill the information as shown below. Select the 'Set as default form for the selected type'. Click OK.



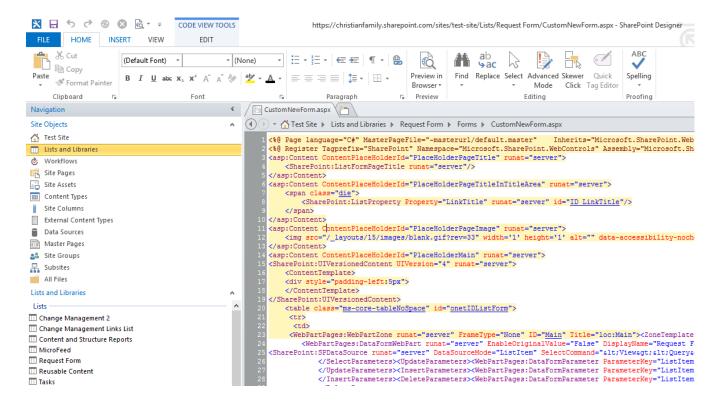
Now in Forms you should see your new custom form. Click on the form. You should

now be presented with the CustomNewForm code. Below is a screenshot.

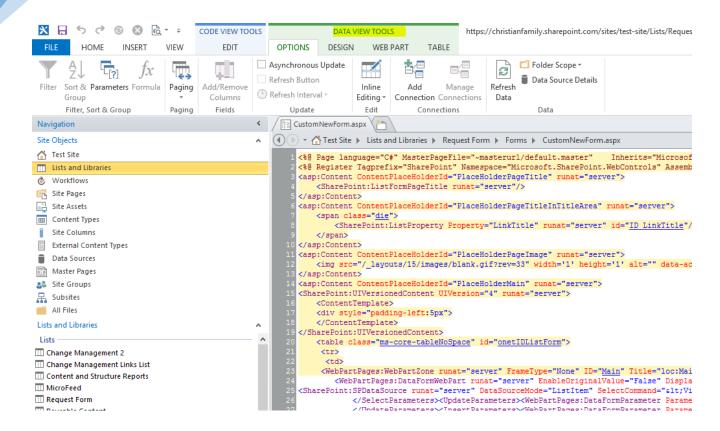


Click on 'CustomNewForm.aspx' to view the code. The first 23 lines are highlighted yellow which you *cannot* edit and hence when you click on it, the Data View Tools will not be available. I have provided screenshots of what the ribbon looks like with and without the tools.

Below is as screenshot without Data View tools. This is because the cursor is on the highlighted yellow code.



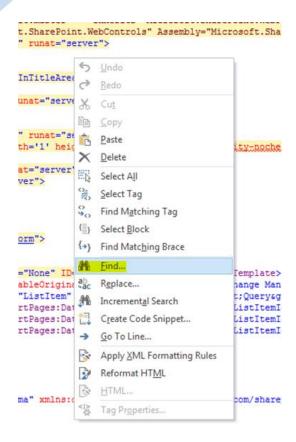
Below is a screenshot with Data View Tools

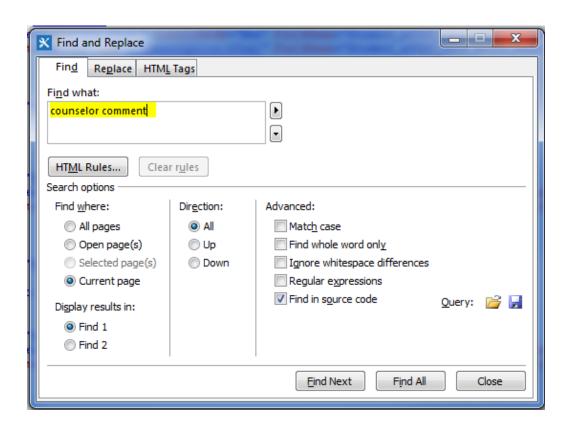


The below table contains the columns that the new form should contain, the rest can be deleted.

List Columns	Student
Title	X
Student Name	X
Student Comment	X
Student Date Request	X
Counselor Name	X
Counselor Comment	delete
Counselor Date	delete
Approved By Counselor	delete
Event Type	X
New Event Description	X
Previous Event Description	X
Address Line 1	X
Address Line 2	X
City	X
State	X
Zip Code	X
Phone Number	X
Fax Number	X
Email Address	X
Current Status	X

In the code right-click and choose 'Find...' from the drop-down list. Type in 'Counselor comment'. Below are screenshots





We need to delete both the ms-formlabel and the ms-formbody for this column. Below is the code that **NEEDS TO BE DELETED**. I have also provided a screenshot as well.

```
<H3 class="ms-standardheader">

<nobr>Counselor Comment</nobr>

</H3>

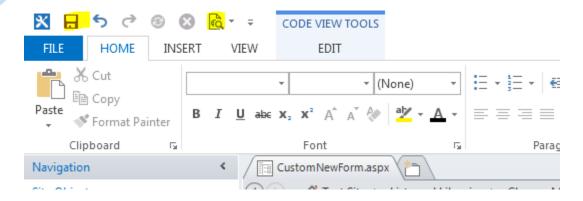
</d>

<p
```

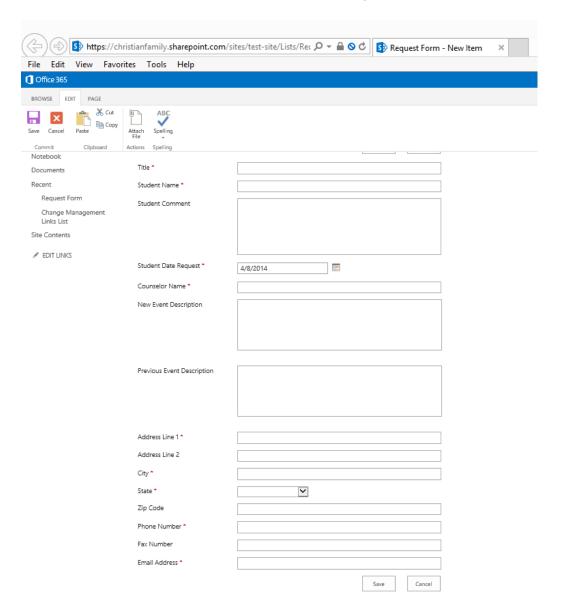
```
<pr
```

Do the same for the other columns that need to be deleted for this view.

Once you have deleted the columns, click Save and then Preview in Browser. Saving the changes you made in the form can take a few seconds.



Below is a screenshot of the CustomNewForm.aspx



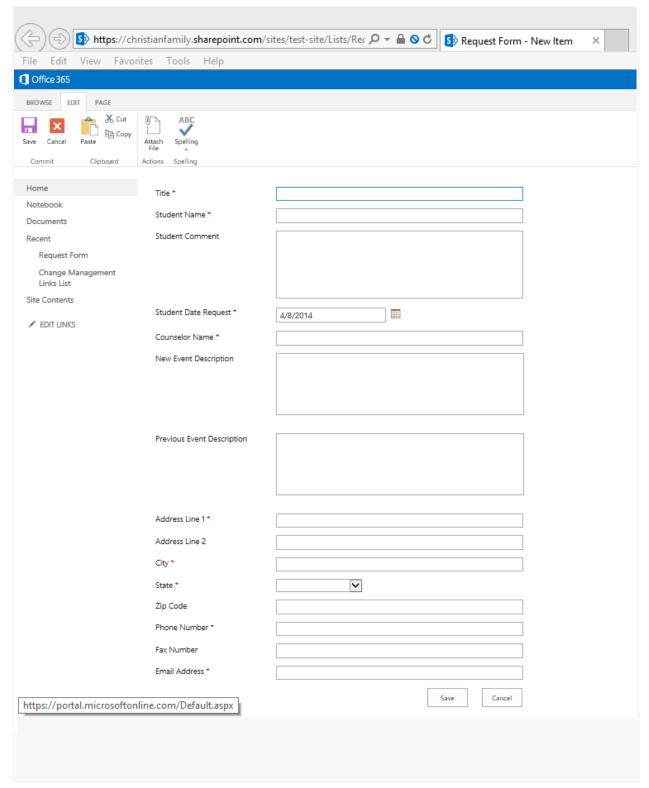
Remove the Save and Cancel button

I am now going to remove the Save and Cancel button from the top and give this form a title. In SharePoint Designer 2013, in the code right-click and choose 'Find...' from the drop-down list. Type in 'savebutton1'. Below is what you are looking for. Delete that code. I have also provided a copy of that code below.

```
>
\langle tr \rangle
<td width="99%" class="ms-
toolbar" nowrap="nowrap"><IMG SRC="/ layouts/15/images/blank.gif" width="1" heig
ht="18"/>
<SharePoint:SaveButton runat="server" ControlMode="New" id="savebutton1"/>

<SharePoint:GoBackButton runat="server" ControlMode="New" id="gobackbutton1"/>
<xs1:param name="kows"/>
     ctd class="ms-toolbar
                 nowrap
         <td class:
```

Again, click Save and then Preview in Browser. Now, as shown below, you should not see the Save and Cancel button on the top.

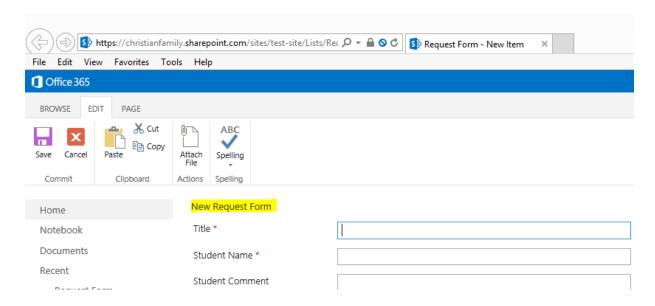


Add Title

In the CustomNewForm.aspx search for dvt_1.body. Below is what you should find.

Right below <xls:template name="dvt_1.body"> , type in a form name, for example 'New Request form'. Below is a screenshot

Again, click Save and then Preview in Browser. Below is what you will see.



To make the text look like a prominent title, go back to SharePoint Designer, highlight the 'New Request Form', click on the Home ribbon and select the font type and size. I selected my font type to be 'Times New Roman' and font size as x-Large which will automatically change the code. Below is what you will see

Again, click Save and then Preview in Browser. Below is what you will see.

Student Name * Student Comment

•

Below is a video which walks you through the steps show above. https://www.youtube.com/watch?v=780oeFDYSI4

4/8/2014

New Request Form

Student Date Request *

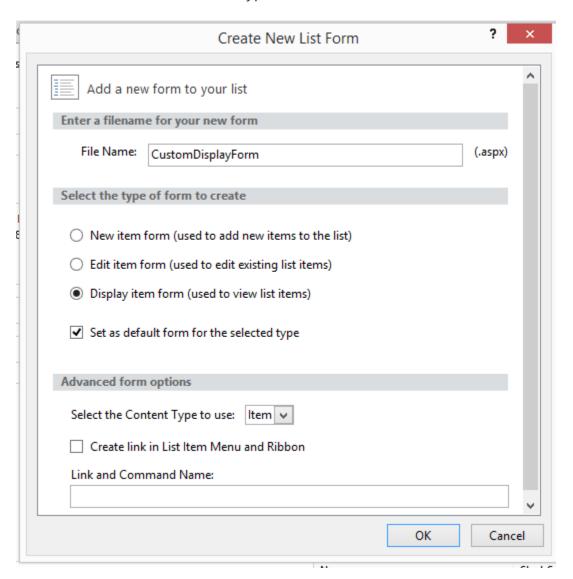
New Event Description

Counselor Name *

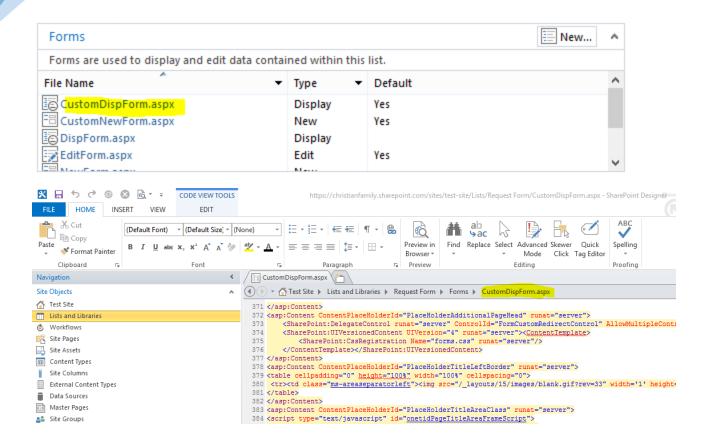
Display Item Form

In this section we are going to build the Display Form. In this form we are <u>not going to</u> <u>delete</u> any columns, however, we are going to remove the 'Close' button from the top and give the form a different name.

Click on the Form's New button and fill the information as shown below. Select the 'Set as default form for the selected type'. Click Ok.



Now in Forms you should see your new custom form. Click on the form. You should now be presented with the CustomDisplayForm code. Below are screenshots.



In the code right-click and choose 'Find...' from the drop-down list. Type in 'gobackbutton1'. Below is what you are looking for. Delete that code. I have also provide a copy of that code below.

```
<IMG SRC="/_layouts/15/images/blank.gif" width="1" heig
ht="18"/>

<SharePoint:GoBackButton runat="server" ControlMode="Display" id="gobackbutton1"/>

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```

```
</td>
```

Again, click Save and then Preview in Browser. Now, you should <u>not</u> see the Close button on the top.

Below is a video which walks you through the process of deleting the top Close button and adding a title.

https://www.youtube.com/watch?v=JZqk8IdfAoc

Edit Item Form

In this section we are going to build the Edit form. In this form we are <u>not going to</u> <u>delete</u> any columns, however, make changes so that some of them cannot be <u>edited</u>. We are also going to remove the Save and Cancel buttons from the top and change the title.

Below is a table which shows which columns can and cannot be edited.

List Columns	Edit View Form
Title	Read Only
Student Name	Read Only
Student Comment	Read Only
Student Date Request	Read Only
Counselor Name	Read Only
Counselor Comment	Edit
Counselor Date	Edit
Approved By Counselor	Edit
Event Type	Read Only
New Event Description	Read Only
Previous Event Description	Read Only
Address Line 1	Read Only
Address Line 2	Read Only
City	Read Only
State	Read Only
Zip Code	Read Only
Phone Number	Read Only
Fax Number	Read Only
Email Address	Read Only
Current Status	Read Only

In the CustomEditForm.aspx code, for all the columns we want to setup as read only, we need to replace the Edit code with the Display code i.e. replace the Edit code shown below (both text and screenshot are provided)

```
<tr>
```

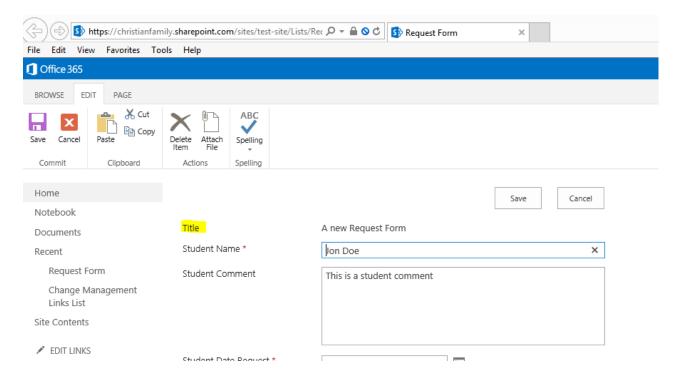
```
<H3 class="ms-standardheader">

<nobr>Title<span class="ms-formvalidation"> *</span>
```

```
</mobr>
</mathrewspace="mathrewspace-"></mathrewspace="mathrewspace-"></mathrewspace="mathrewspace-"></mathrewspace="mathrewspace-"></mathrewspace="mathrewspace-"></mathrewspace="mathrewspace-"></mathrewspace="mathrewspace-"></mathrewspace="mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-"></mathrewspace-">
```

With the Display code as shown below (both text and screenshot are provided)

Below is a screenshot of what the Edit view looks like when the Title column has been setup as display only.



Below is a video which walks you through the process of editing the edit item form to force some of the fields to be in display mode only. In this video I have first purposefully left the Title column as it is and also copied the code over from the display form to show you both. Then I have made all the changes to only allow the Counselor Comment, Counselor Date and Approved by Counselor fields to be editable.

https://www.youtube.com/watch?v=rhrxBzXUFBU

Conclusion

In this article I have not described the use of the Current Status column that we created. This column is primarily used for workflows i.e. you can use that choice field to setup workflow conditions to perform desired actions.

This article is to provide a quick, easy and little to no-code solution to create custom design forms for a SharePoint list or document library using only SharePoint Designer 2013. Once the custom forms have been built and set as default, it is at your discretion to delete the original three forms.