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DFFS v4

How to set up Dynamic Forms for SharePoint v4

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Compatibility

DFFS v4 is compatible with WSS / Moss 2007, SP 2010 and 2013 – both foundation, server and online 365.

Upgrading from a previous version

Dynamic Forms for SharePoint v4 is backwards compatible with DFFS v3.x, but if you are upgrading from an early 3.x version, you should read the change log to see if some of the bug fixes in later 3.x versions may affect how your rules are processed. You find the change log where you download the code.

As a precaution, you should always test a new version in your setup to ensure it works as expected.

If you have trouble, look at the troubleshooting section at the bottom of this document.

Please note that you no longer use this keyword in the URL to enter setup:

```
?dfsetup=1
```

If you have hidden the enter setup link, you must use a dedicated "enter setup page". You can find a code example in the DFFS pages in my blog.

1. Quick start guide

Download the DFFS files from here

<http://spjsfiles.com>

Download spjs-utility.js from here

<http://spjsfiles.com>

Download jQuery from here

<http://jquery.com>

Upload files to SharePoint and update script and CSS references

Upload to SharePoint and fix the links in "DFFS_frontend_CEWP.js.aspx" and "DFFS_backend_CEWP.js.aspx".

Add code to the backend

Create a web part page and add a CEWP linking to "DFFS_backend_CEWP.js.aspx" using the content link option. Add the link to the backend page to the variable "spjs_dffs_backend" in the file "DFFS_frontend_CEWP.js.aspx".

Add code to the frontend

Add "DFFS_Overlay.js.aspx" above and "DFFS_frontend_CEWP.js.aspx" below the form web part in NewForm, DispForm and EditForm using a CEWP and the content link option.

Create web part templates from the overlay and the frontend CEWPs for use in other forms.

Save as template and upload to the web part gallery.

2. In depth step-by-step guide

All pictures are from SharePoint 2013. If you cannot recognize the appropriate steps for SP 2007 or 2010, please contact me by the email found in the last section of this document.

2.1. Download the files

<http://spjsfiles.com/index.php?dir=SharePoint%20JavaScripts/DynamicFormsForSharePoint/v4>

You will also need spjs-utility.js from here:

<http://spjsfiles.com/index.php?dir=SharePoint+JavaScripts%2F>

In addition, get jQuery from here: <http://jquery.com>

Please note that you will want to download jQuery v1.x to ensure compatibility with older IE versions. I have used v1.11.1 in my examples.

Ensure you download the correct version, and save the files to your local computer before uploading them to the SharePoint site where you want the solution activated.

2.2. Upload the files to SharePoint

Either use SharePoint Designer (SPD) to create a folder on the root of the site, or create a document library in the site and upload the files like in figure 1 below.

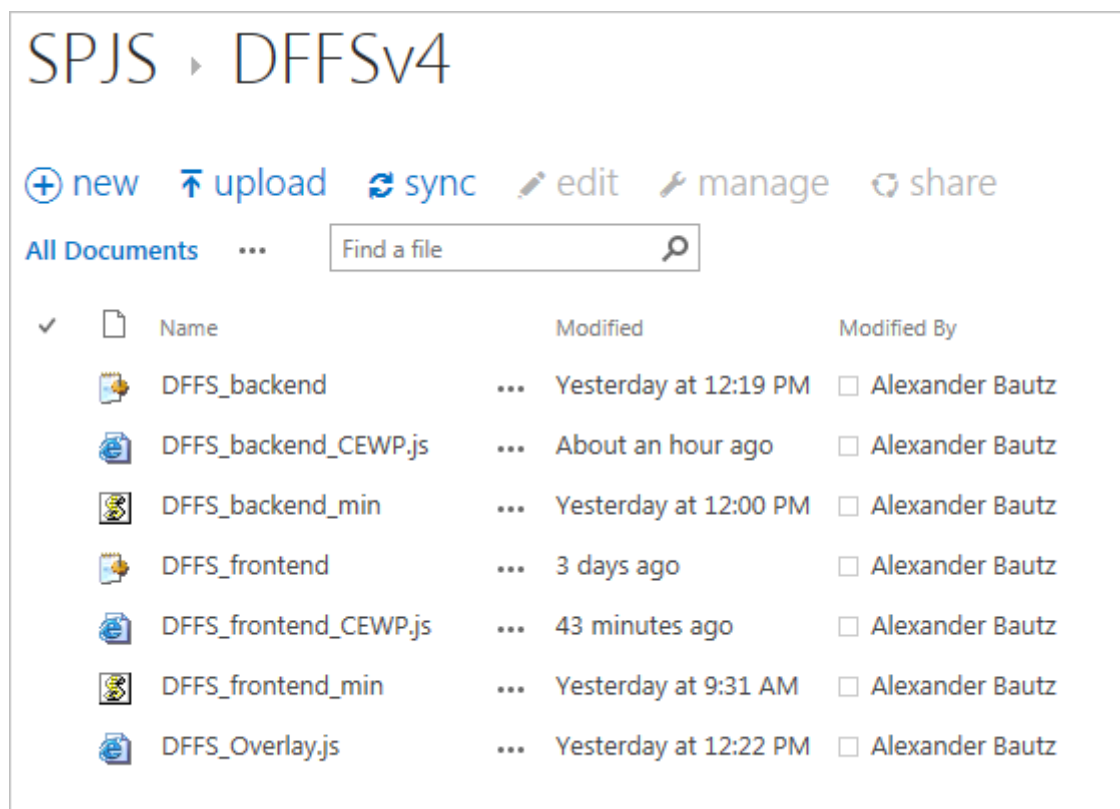


Figure 1: Document library containing all the DFFS files.

The above picture shows the folder "DFFSv4". JQuery and spjs-utility.js is located in another folder in the same library.

If you go with option one, you do not have to worry about giving users read access to the files, and you (or other administrators) can easily edit the files using SPD. Performance wise there is no difference so if you do not have access to SPD you can upload the files to a document library.

If you go with the document library, you must ensure all users have READ access to the files.

Do NOT refer the files directly from spjsfiles.com, as this server is not a CDN.

2.3. Add the code to the forms and the backend

New in v4.x is that the code is split in two parts, one for the "backend" where you change the configuration, and one for the "frontend" in the form. The DFFS backend is set up in a web part page somewhere in the site collection. To prevent others from modifying the DFFS setup, you can have this web part page in a sub site where only site owners have access.

Start by creating this web part page, as you must use the URL to this page in the setup for the DFFS frontend.

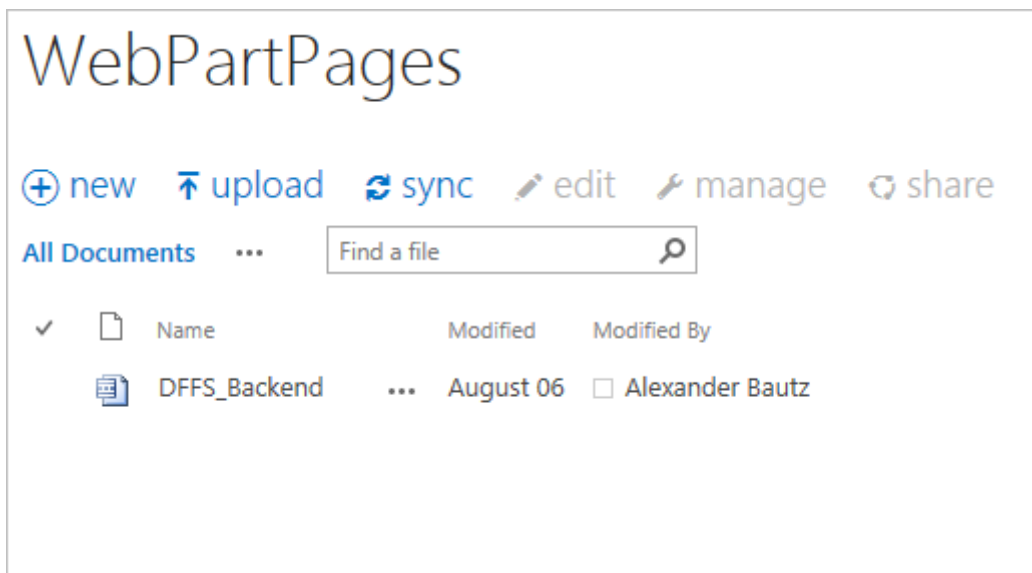


Figure 1: Document library containing a web part page for the DFFS backend

2.3.1. How to add a web part page in SP 2013

It can be a bit cumbersome to add web part page in SP 2013. If you have trouble, try writing the URL directly in the address bar of your browser:

http://example.com/_layouts/15/spcf.aspx

2.3.2. Manually set the location of the configuration list

By default, the configuration for the forms you activate DFFS for is stored in a list named "SPJS-DynamicFormsForSharePoint" on the same site as you set up the DFFS_frontend. When you enter the backend, the baseUrl of the frontend site is passed as a parameter in the URL. This way you can have the backend in a centralized location, but still save the configuration for your forms in a list in the site where the current form is located.

If you want set a fixed location of the configuration list in for example a sub site or the root site, you must add a variable to both the "DFFS_frontend.js.aspx" and the "DFFS_backend.js.aspx" files like this:

```
var dffs_configListBaseUrl = "/SubsiteForDFFSConfig";
```

"SubsiteForDFFSConfig" is the relative URL to the site where the configuration is located. If you want to use the root site (and you are not on a managed path), the variable would be an empty string like this:

```
var dffs_configListBaseUrl = "";
```

This will force all lists using this current backend location to share a configuration list.

Ensure all users have read access to this location.

Why would you want to do that?

You can use this option if you have DFFS configured for a list that is part of a site template, and you want all the new sites created from this template to share the configuration for the lists.

Pros:

You can manage the DFFS configuration for all sites created from this template in one location.

Cons:

You cannot add site-specific modifications to a list.

2.3.3. DFFS Backend

Update links

Modify the file "DFFS_backend_CEW.js.aspx" and change all the script references highlighted in figure 3 below so that they refer to your local copy of the files.

```
<div id="dffs_backend"></div>
<link type="text/css" href="/DFFS/SPJS/DFFSv4/DFFS_backend.css" rel="stylesheet">
<script type="text/javascript" src="/DFFS/SPJS/jquery-1.11.1.min.js"></script>
<script type="text/javascript" src="/DFFS/SPJS/spjs-utility.js"></script>
<!-- Optional plugins
<script type="text/javascript" src="/DFFS/SPJS/vLookup.js"></script>
<script type="text/javascript" src="/DFFS/SPJS/SPJS-Casc.js"></script>
-->
<script type="text/javascript">

// License key
var spjs_dffs_license = "Put the DFFS license code here";

</script>
<script type="text/javascript" src="/DFFS/SPJS/DFFSv4/DFFS_backend_min.js"></script>
```

Figure 2: Contents of the file "DFFS_backend.js.aspx".

To ensure you get the correct URL go to the location you have uploaded the files, right click > copy / copy shortcut and paste in the "src" attribute for the script files, or the href attribute for the CSS files.

Add license code

Add the license code to the variable "spjs_dffs_license" by changing the text "put the license code here" with the license code string.

If you have a v3.x license, you can use this by using the old variable name like "spjs_license" instead of "spjs_dffs_license".

If you do not have a valid license, follow this link to purchase one:

<http://spjsblog.com>

Add CEWP to the backend page

In the web part page you created for the DFFS Backend, add a CEWP and link to the updated "DFFS_backend_CEWP.js.aspx" using the content link option.

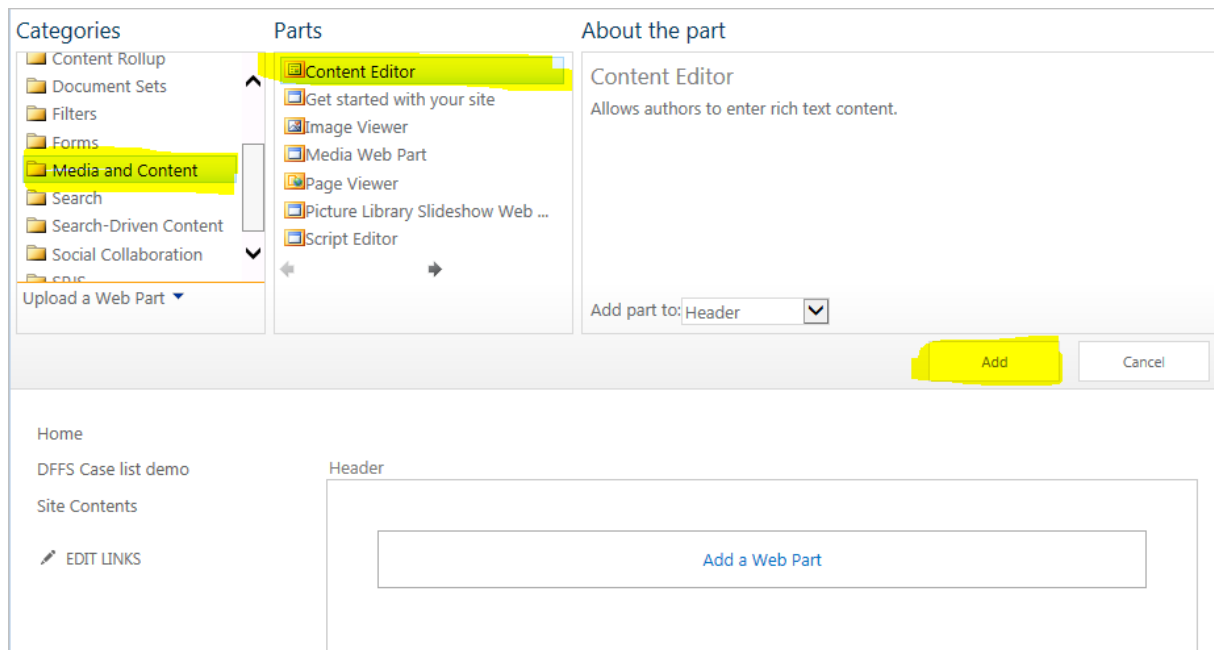


Figure 3: Add CEWP to hold the DFFS_backend.js.aspx

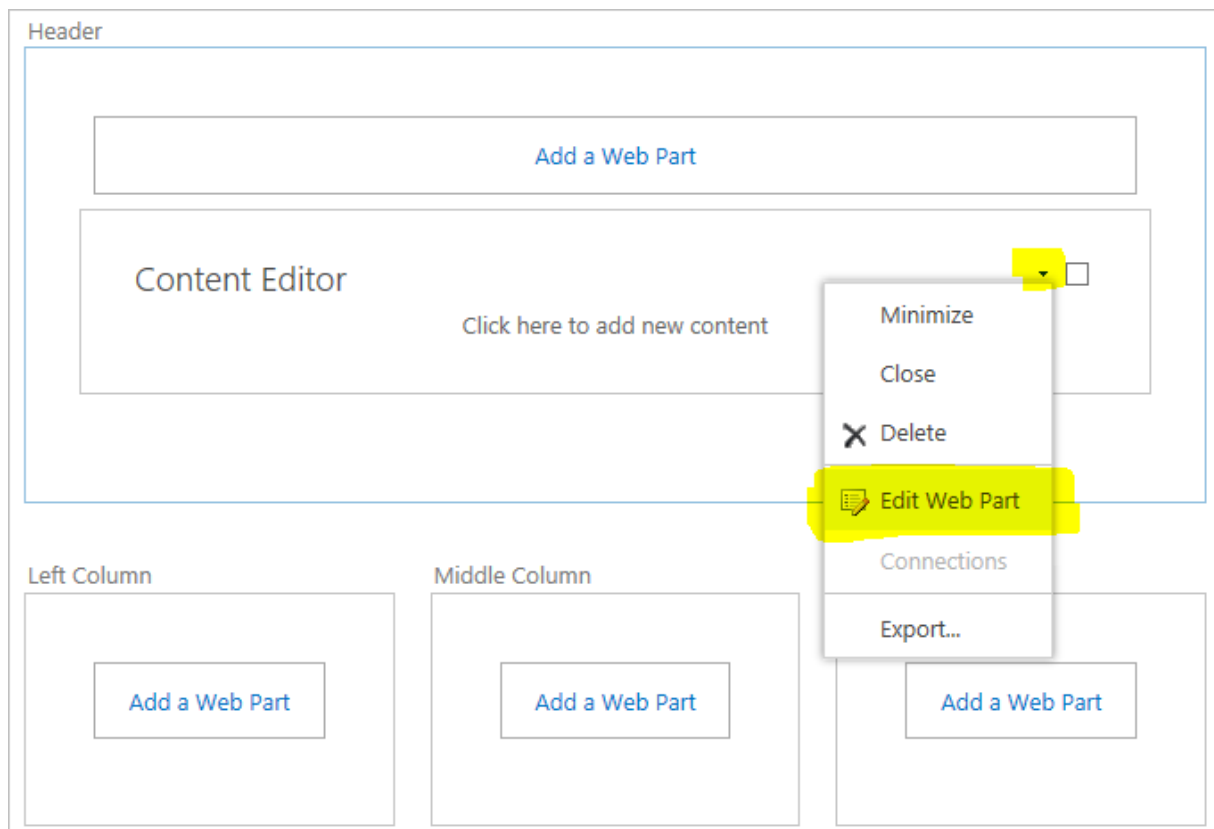


Figure 4: Edit the CEWP

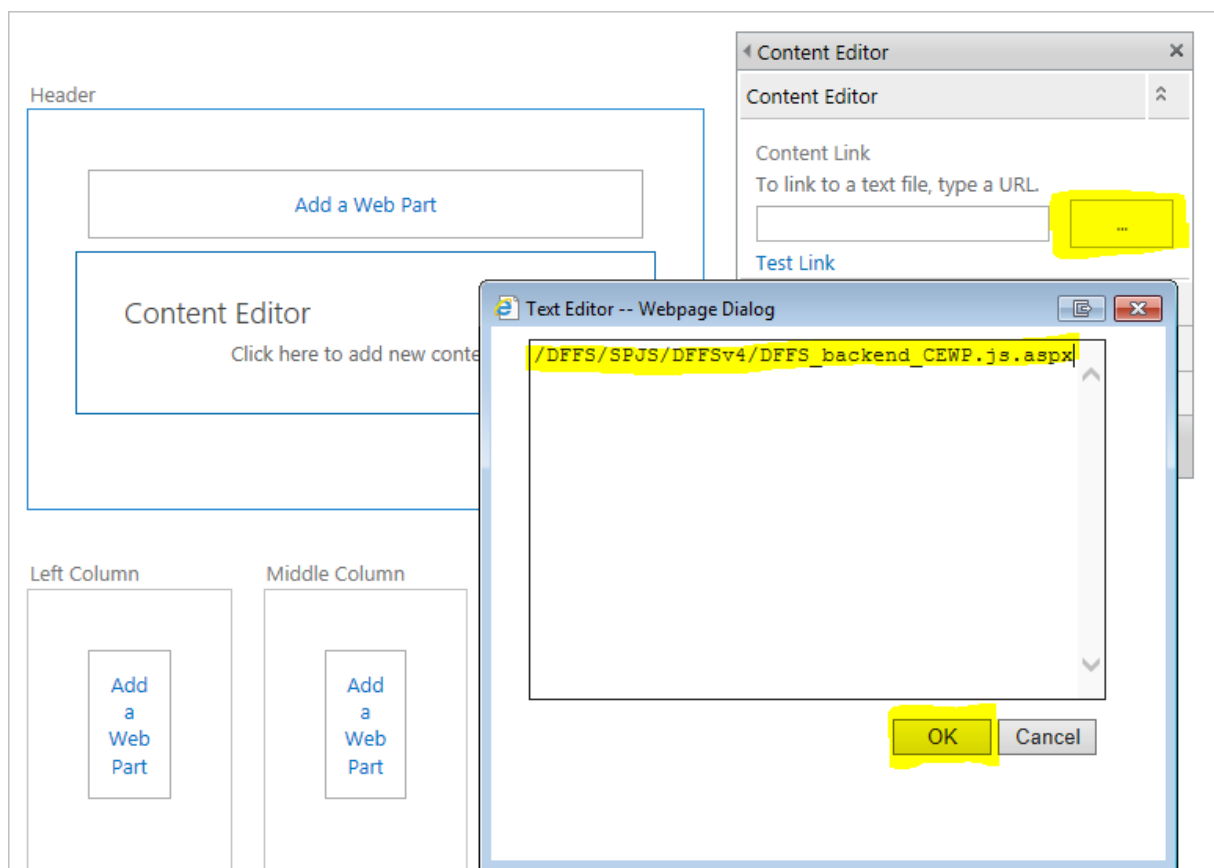


Figure 5: Add the URL to "DFFS_backend.js.aspx" to the "Content Link" field.

You will get a message telling you that you are missing some URL parameters. This is OK, as you must enter this page from the frontend to do the actual editing of the configuration.

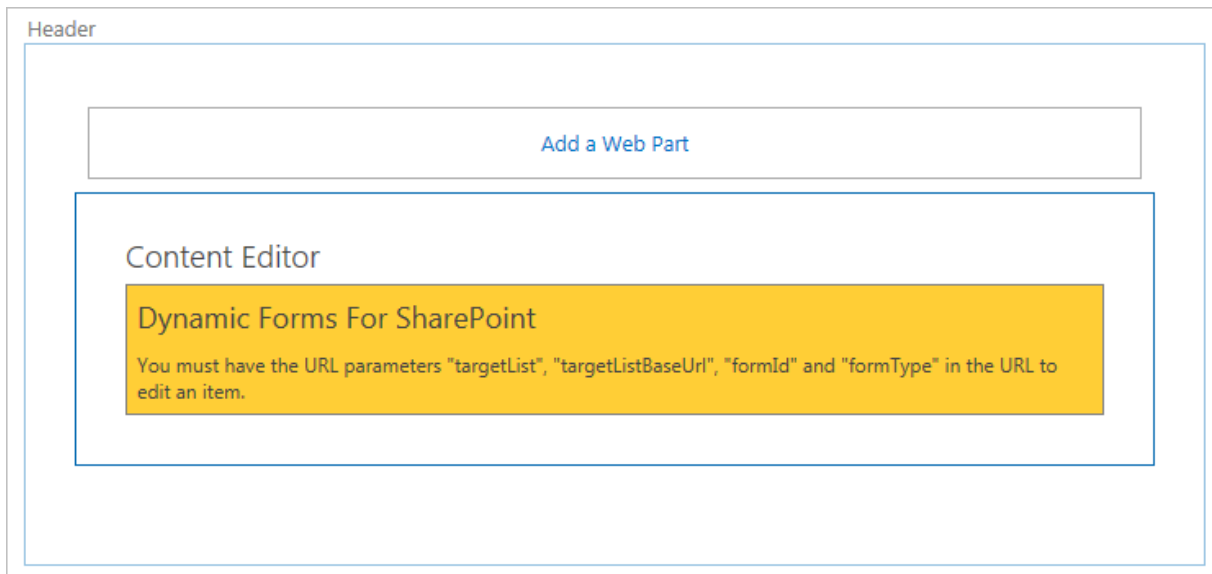


Figure 6: The backend is ready.

2.3.4. DFFS Frontend

Update links

Modify the file "DFFS_frontend_CEWP.js.aspx" and change all the script references highlighted in figure 7 below so that they refer to your local copy of the files.

```
<link type="text/css" href="/DFFS/SPJS/DFFSv4/DFFS_frontend.css" rel="stylesheet">
<script type="text/javascript" src="/DFFS/SPJS/jquery-1.11.1.min.js"></script>
<script type="text/javascript" src="/DFFS/SPJS/spjs-utility.js"></script>
<!-- Optional plugins -->
<script type="text/javascript" src="/DFFS/SPJS/vLookup.js"></script>
<script type="text/javascript" src="/DFFS/SPJS/SPJS-Casc.js"></script>
<script type="text/javascript" src="/DFFS/SPJS/SPJSRM/SPJSRM.js"></script>
<!-- Optional plugins -->
<script type="text/javascript">

var spjs_dffs_license = "Put the DFFS license code here";
var spjs_dffs_backend = "URL to the DFFS backend - refer the file How to set up DFFS v4 for details";

</script>
<script type="text/javascript" src="/DFFS/SPJS/DFFSv4/DFFS_frontend_min.js"></script>
```

Figure 7: Contents of the file "DFFS_frontend.js.aspx".

To ensure you get the correct URL go to the location you have uploaded the files, right click > copy / copy shortcut and paste in the "src" attribute for the script files, or the href attribute for the CSS files.

The variable "spjs_dffs_backend" contains the URL to the web part page you created in section 2.3 above.

Add license code

Also, add the license code to the variable "spjs_dffs_license" by changing the text "put the license code here" with the license code string.

If you have a v3.x license, you can use this by using the old variable name like "spjs_license" instead of "spjs_dffs_license".

If you have not already purchased a license, you can do it by following this link:

<http://spjsblog.com/license-code>

SharePoint 2007

If you are using SharePoint 2007, you must add one more variable to the "DFFS_frontend_CEWP.js.aspx" file. This because in SP 2007 the list GUID is not present in the form by default.

Add the variable to the CEWP like this:

```
_spPageContextInfo = {"pageListId":{"CE2C4401-0C2F-446B-944B-C28922BD0B42}}"
```

How to find the correct list GUID

Go to a list view of the list. Right click and select "view source". Search for "ctx.listName", and you will find it like this:

```
ctx.listName = "{CE2C4401-0C2F-446B-944B-C28922BD0B42}";
```

Please note that because the list GUID must be provided in the "DFFS_frontend.js.aspx" file, SP 2007 users cannot use the ability to add this web part as a template as described in the "Save the DFFS web parts as templates" section below.

2.3.5. Add a CEWP to a form

You must add the DFFS solution to all three forms: NewForm, DispForm and EditForm.

Follow these instructions to set up the first form. Then go to the "Save the DFFS web parts as templates" section to make it easier to set up the solution for additional forms.

Enter edit mode

SP 2007

Go to the form you want to add the solution to, and modify the URL like this:

```
/Sites/MySite/Lists/MyList/NewForm.aspx?toolpaneview=2  
/Sites/MySite/Lists/MyList/DispForm.aspx?toolpaneview=2  
/Sites/MySite/Lists/MyList/EditForm.aspx?toolpaneview=2
```

SP 2010 and 2013

Go to the list and use the ribbon controls under "List" > "Form Web Parts" and select the form you want to edit.

Add the code

Add two Content Editor Web parts, one above the form web part, and one below. Look at the section "Add CEWP to the backend page" for details on how to add the CEWP.

Code above the form web part

Edit the CEWP above the form, and use the "Content link option" to link to the file "DFFS_Overlay.js.aspx".

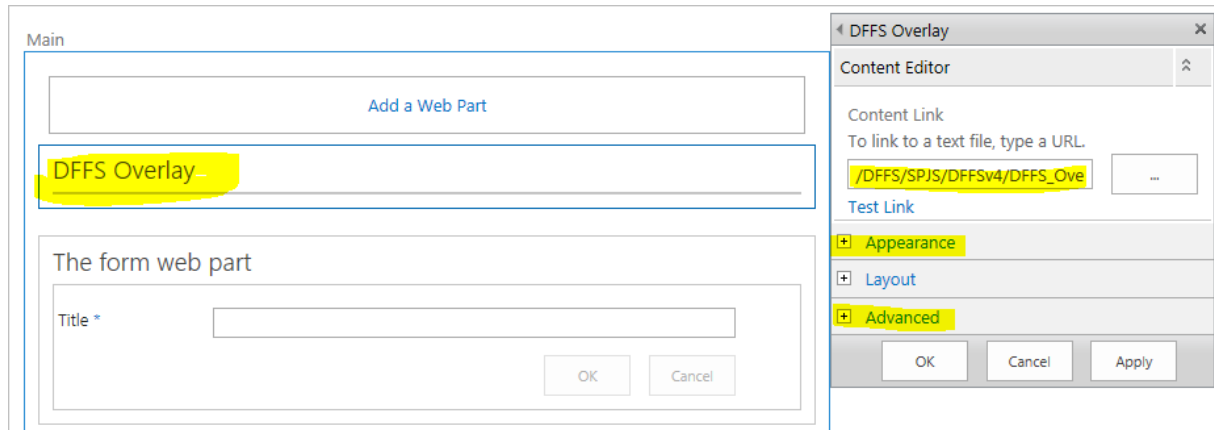


Figure 8: The overlay web part above the form web part.

Expand the "Appearance" section, and use this for "Title": DFFS Overlay.

Expand the "Advanced" section, and uncheck all the boxes for allow minimize etc.

Add this text as "Description": Add this web part above the form web part to prevent the form from flashing unformatted before DFFS is applied.

Do not hide the web part.

Code below the form web part

In the CEWP below the form, use the "Content link option" to link to the file "DFFS_frontend.js.aspx".

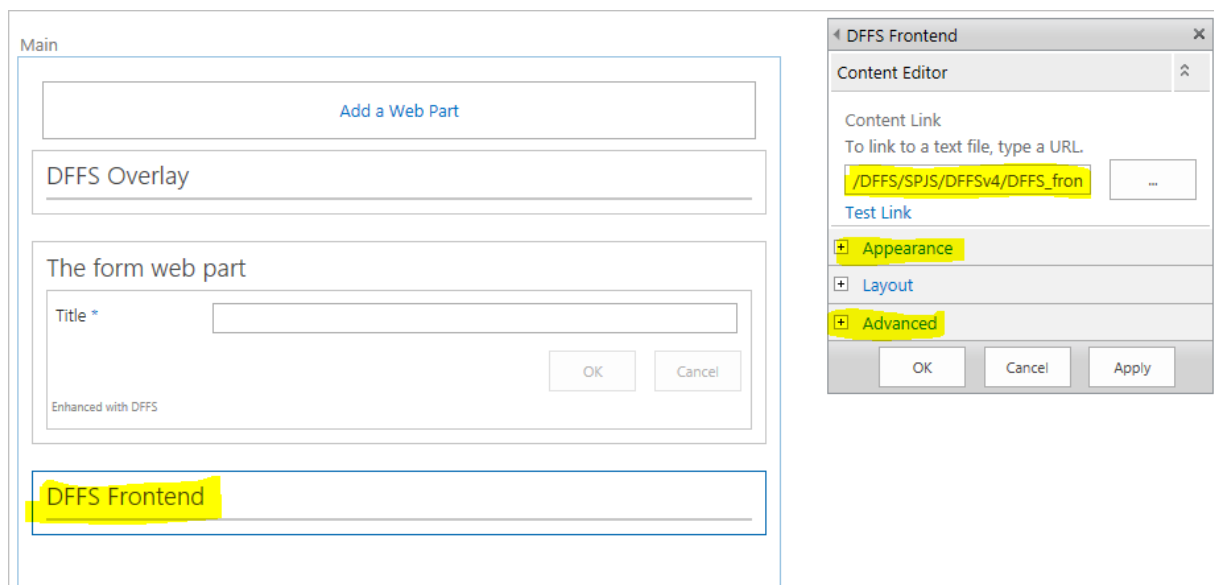


Figure 9: The DFFS frontend web part below the form web part.

Expand the "Appearance", and use this for "Title": DFFS Frontend.

Expand the "Advanced" section, and uncheck all the boxes for allow minimize etc.

Add this text as "Description": Add this web part below the form web part to activate DFFS for this form.

Do not hide the web part.

2.4. Save the DFFS web parts as templates

This step is optional, but highly recommended!

Unfortunately, SP 2007 users cannot save the "DFFS_frontend.js.aspx" web part as a template because you must provide the unique list GUID in the CEWP.

When you have configured the CEWPs on the first form and verified they are correctly set up, go back into edit mode and from the edit menu on the web part, select "Export".

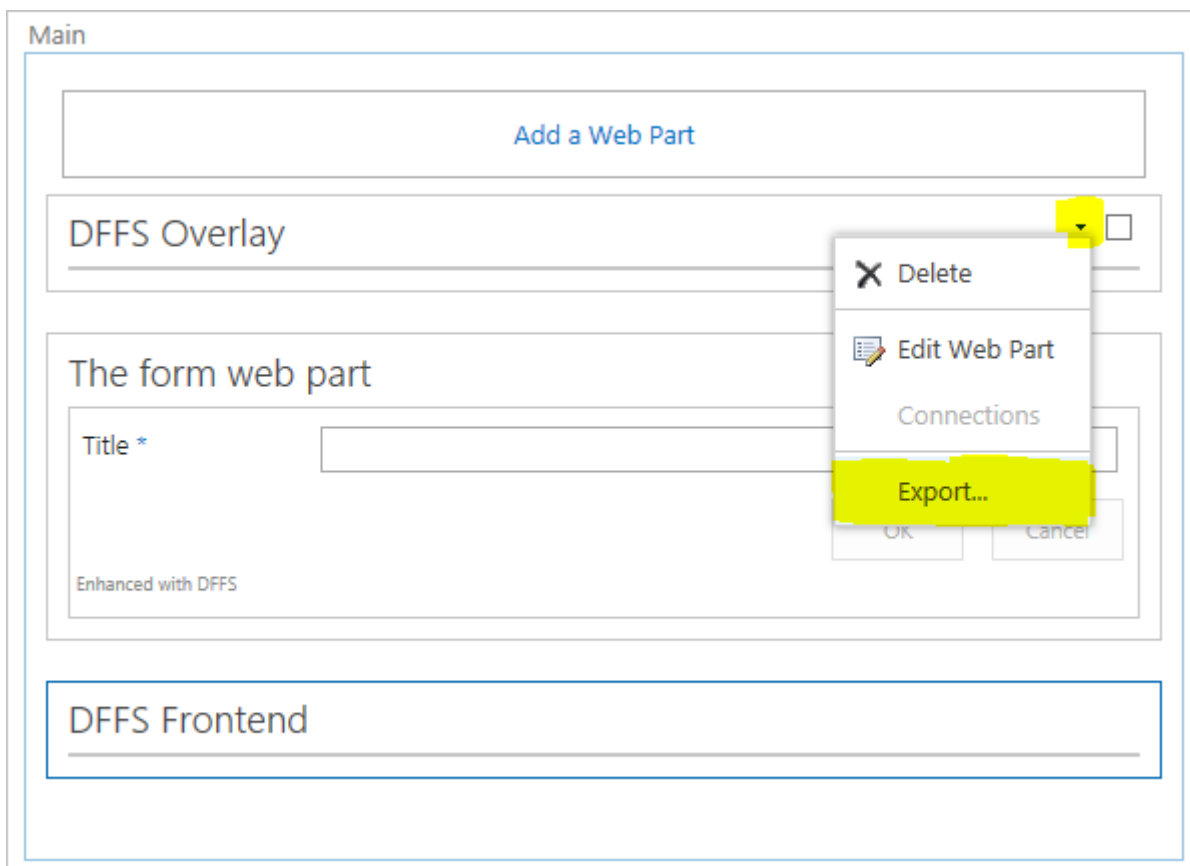


Figure 10: Export the web part.

Save the files locally, and upload them to the web part gallery on the root of your site collection by going to "Site Settings" on the top site, select "Web parts" under "Web Designer Galleries".

Upload the file to the library:

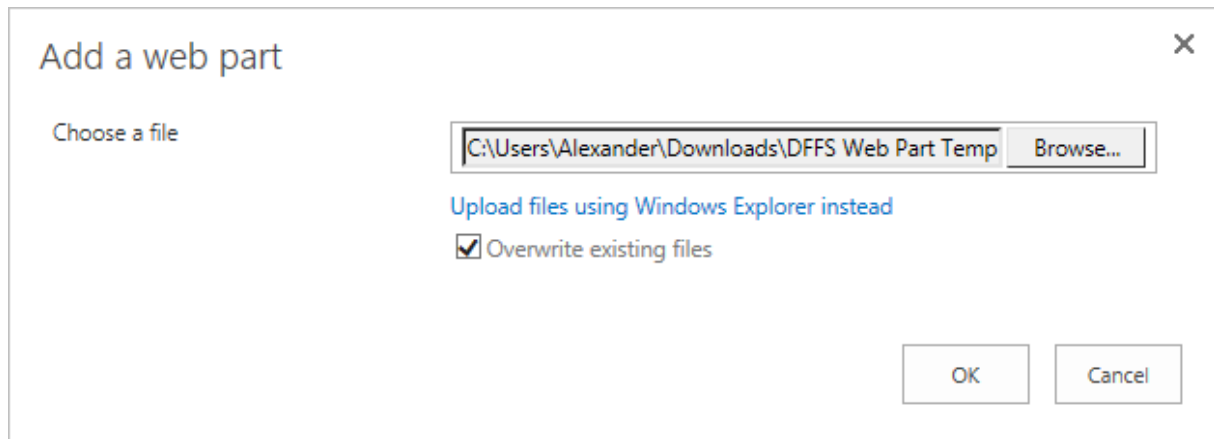


Figure 11: Upload file to the gallery.

Tag the web parts with a group name like "DFFS" to make it easy to find the web parts in the repository when you want to add DFFS to another form.

Web Part Gallery - DFFS Overlay.dwp

EDIT

Save

Cancel

Paste

Cut

Copy

Delete Item

Export

View Xml

Shared With

Commit

Clipboard

Actions

Name *
DFFS Overlay.dwp

Title
DFFS Overlay

Description
Add this web part above the form web part to prevent the form from flashing unformatted before DFFS is applied.

Group

☐

☒ Specify your own value:
DFFS

Recommendation Settings

☐ Filters
☐ Dashboard
☐ My Site
☐ Specify your own value:

Please specify site template names separated by ";#". Your web part will appear in "Recommended Items" category when a user tries to add a web part to any web part pages within sites using site templates mentioned here. Otherwise, for page level recommendations of web parts, you can include a tag in here and then add that same tag to "Recommended" property on the web part adder control on the page in question.

Created at 8/17/2014 7:51 AM by ☐ Alexander Bautz
Last modified at 8/17/2014 7:51 AM by ☐ Alexander Bautz

Save

Cancel

Figure 12: Add the web part to the gallery.

Repeat for the DFFS frontend web part.

Now you can add DFFS to additional forms by picking the preconfigured web parts from the web part gallery.

How to set up DFFS

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Troubleshooting

Problem	Solution
I have updated from a previous version and the configuration will not load.	<p>Hit F12 in the browser to bring up the developer console. Select "Console" and reload the web page to look for errors.</p> <p>Report any errors to the email address found in the "File a bug reports" section below.</p> <p>When you have filed the bug report, roll back to the previous version of the script while waiting for my response.</p> <p>If you have saved the configuration already, look at the next "problem" below.</p>
I have saved the configuration, but now it is corrupted.	<p>The "last good configuration" is automatically preserved. You can roll back like this:</p> <ul style="list-style-type: none"> • Go to the configuration list in all site contents. • Locate the correct form. • Edit the list item and copy from "lastGoodConfig" to "blob". • Reload the form to verify that it is OK.
I have an InfoPath form, or a form customized in SharePoint Designer and I cannot get DFFS to work.	<p>Sorry, but DFFS is designed for out of the box SharePoint forms and although you might get it working for a customized form, I cannot help you with it.</p>
Nothing happens, or the overlay shows "This took forever".	<p>Ensure you have referred all the scripts correctly. Try the script src or the css href link in the URL field of the browser to verify it is correct.</p> <p>Hit F12 in the browser to bring up the developer console. Select "Console" and reload the web page to look for errors.</p> <p>If you see '\$' is undefined you are missing a reference to jQuery.</p> <p>If you receive another error message that you do not know how to handle, please send it to the email address found in the "File a bug reports" section below.</p>
It works for me, but not for the other users.	<p>Ensure all users have read access to the library where you uploaded the *.js and *.css files.</p>
All the scripts are OK, the overlay flashes and disappears, but the button to enter the setup does not show.	<p>Ensure you have added the DFFS Frontend CEWP <u>below</u> the form web part.</p>
The tabs appear as bulleted lists.	<p>The CSS file is not loaded. Verify the href to the CSS file in the CEWP.</p>

The form flashes "unformatted" before DFFS kicks in.	You are missing the "DFFS Overlay" web part, or you have placed it below and not above the form.
I try to save the configuration in the DFFS Backend, but receive "ERROR: JSON.stringify is not supported in your browser!"	<p>You are using an older version of Internet Explorer. Either update the browser, or use a modern browser like Firefox or Chrome to configure the DFFS solution.</p> <p>If you are using SP2007 and your Internet Explorer version is above version 8, you can hit F12 and change the Document mode and User agent string to 9 or 10.</p> <p>You must switch this back when you have saved the configuration, as SP2007 does not behave well if the Document mode is not set to "Quirks".</p> <p>The frontend of DFFS is not affected.</p>
I have configured my form in the backend, but my frontend acts as if no configuration exists.	<p>There were a bug in v4.0 to 4.100 that caused this issue if you had the DFFS backend set up in a different site from where you configured the frontend.</p> <p>Resolution: Please upgrade to v4.101 or above of the DFFS_backend_min.js.</p> <p>Explanation: The backend defaulted to its current site for saving the configuration and did not read the current lists baseURL from the URL parameter. This caused the backend to save the configuration to its current site, while the frontend looked for the configuration in its current site.</p> <p>Please note that you can override the placement of the configuration list. Look at the section "Manually set the location of the configuration list" above.</p>

File a bug reports

To file a bug report, send the following:

- A detailed description of your problem.
- Any error messaged from the developer console (hit F12 and select "Console". Refresh the page and look for error messages).
- Information about your SharePoint version.
- Information about your browser version.
- Other information that may be relevant.

For priority support, please include the name of the person that holds the license to DFFS.

Use the subject "Bug", and send to alexander.bautz+DFFS@gmail.com (yes, the +DFFS is supposed to be in the address).