



KWizCom Corporation



File Upload field type

User Guide

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INTRODUCTION

GENERAL

This document provides all the information needed to install, evaluate and deploy this KWizCom product:

- Introduction
- Installation Guide
- Administrator Guide
- User Guide
- FAQ

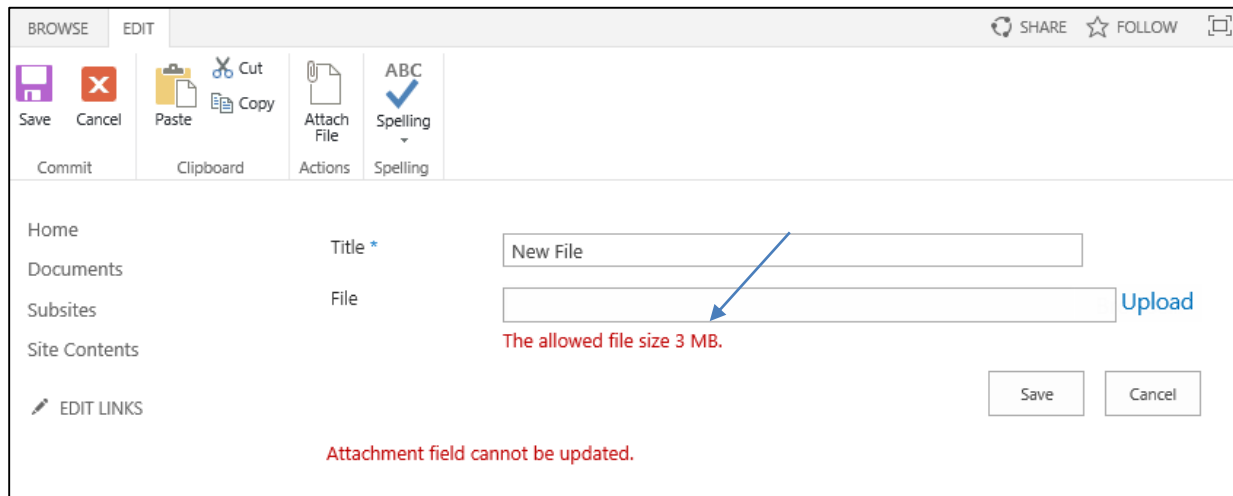
PRODUCT OVERVIEW

The *SharePoint File Upload field type* enables attaching a single file to a record (list item) while overcoming the issues related with out-of-the-box SharePoint attachments:

- No control over the attached file type
- No control over the attached file size
- No way to restrict the number of file attachments
- No way to configure file attachments as mandatory

While using the out-of-the-box file attachments you can easily find yourself dealing with records that include a pile of irrelevant file attachments, or with missing file attachments.

With the **File Upload field type** you have full control over the files that can or should be attached to SharePoint list items.



Records integrity and consistency become much easier to implement!

WHY DID WE BUILD IT?

Many business scenarios require attaching files to records in a controlled way, such as:

- **Sales lead record (in Sales CRM solution)**

A lead requires several file attachments that are a “must” in various stages of the lead’s lifecycle:

- RFP/RFI
- SOW
- Price Offer

We wish to validate the existence and format of each of these exact files.

- **Project Management/Contract Management**

A contract/project record may require attaching signed documents such as contract/agreement/SOW etc. We also may need to trigger a workflow once a specific file has been attached to the record.

KEY FEATURES

Feature	SharePoint File Upload field type	SharePoint 2007/2010/2013 out-of-the-box file attachments
Ability to configure a file attachment as required	✓	
Have control over the uploaded file type	✓	
Have control over the uploaded file size	✓	
A field restricts the number of attachments to 1	✓	
Cross-browser	✓	
Multi-lingual	✓	

INSTALLATION GUIDE

SOFTWARE REQUIREMENTS

SERVER REQUIREMENTS

- SharePoint 2007 / WSS 3.0 or
- SharePoint Server/Foundation 2010/2013

CLIENT REQUIREMENTS

- Windows 7/8 or MAC OSX V10.9
- Microsoft Internet Explorer 9+, Mozilla Firefox (Latest version), Google Chrome (Latest version), Safari (Latest version).

INSTALLATION PROCEDURE

SHAREPOINT 2007

1. Log in as SharePoint administrator account to your SharePoint front-end server.
2. Download the product's latest evaluation version from KWizCom's internet web site. This evaluation version is fully functional for 30 days. Further details about product activation can be found in the Administrator guide (next section).
3. Unzip the product's zip file on your SharePoint server.
4. Double-click the .msi file in order to begin the web installation.
5. When the installation process is complete it will recycle all application pools automatically.

SHAREPOINT 2010/2013

1. Log in as SharePoint administrator account to your SharePoint front-end server.
2. Browse the product's page on KWizCom's website and click the "Go" link under the "Install using our Web Installer" section.
This will start the KWizCom web installer.
3. **Note:** The KWizCom Web Installer will automatically offer you to upgrade other existing KWizCom products on your farm, in case you have old versions installed. You can check which products you wish to update at this time.

In case you prefer just to download the relevant .wsp packages and manually deploy them, then in the web installer UI check the “Download only” option (3rd page in the installer’s wizard). When the installer finishes you will be able to go to the installer’s folder on your server, and install the KWizCom packages by simply running the “SP-WSPInstaller” PowerShell script.

4. At the end of the installation process, you should see all packages deployed in the **Central Admin >System settings>Manage Farm Solutions** page, and the KWizCom SharePoint Foundation package should be deployed also in the Central Admin’s web application.

POST INSTALLATION

N/A.

UN-INSTALLATION PROCEDURE

SHAREPOINT 2007

1. Log in as local admin to your SharePoint front-end server.
1. Go to Control Panel and double-click **Add or Remove Programs**.
2. Select KWizCom SharePoint File Upload filed type entry and click **Remove** button.
3. Click **Yes** to approve the removal of the component.
4. Once the product was un-installed, close the **Add or Remove Programs** screen.

SHAREPOINT 2010/2013

1. Retract the solution using SharePoint central admin or by using stsadm/powershell command line.

ADMINISTRATION GUIDE

This section describes all administration activities including: product localization, product configuration and customization.

PRODUCT ACTIVATION

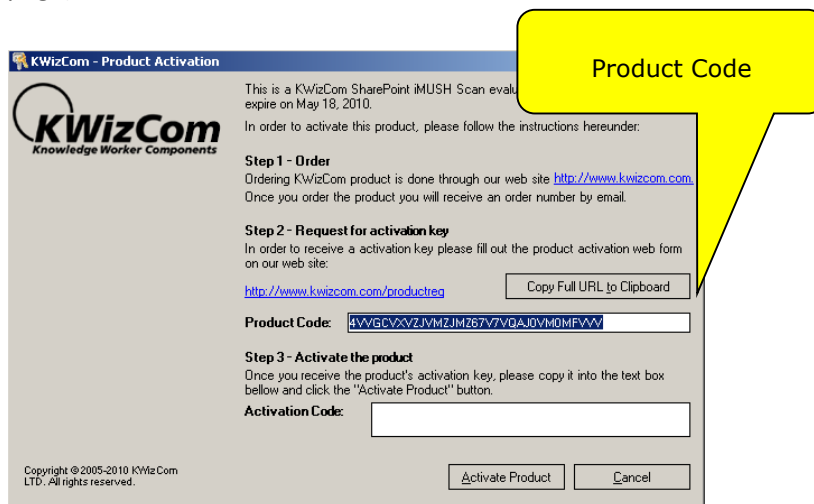
KWizCom products are available for evaluation prior to purchase.


This way you can try our components and verify that they indeed meet your needs. Each evaluation version contains all features of the component's production version. The only difference between the versions is that the evaluation version is time-limited and will operate for a period of one month.

Once you decide to purchase a KWizCom component you will need to **order** and then to **activate** the product. The steps that need to be taken next are listed below.

SHAREPOINT 2007

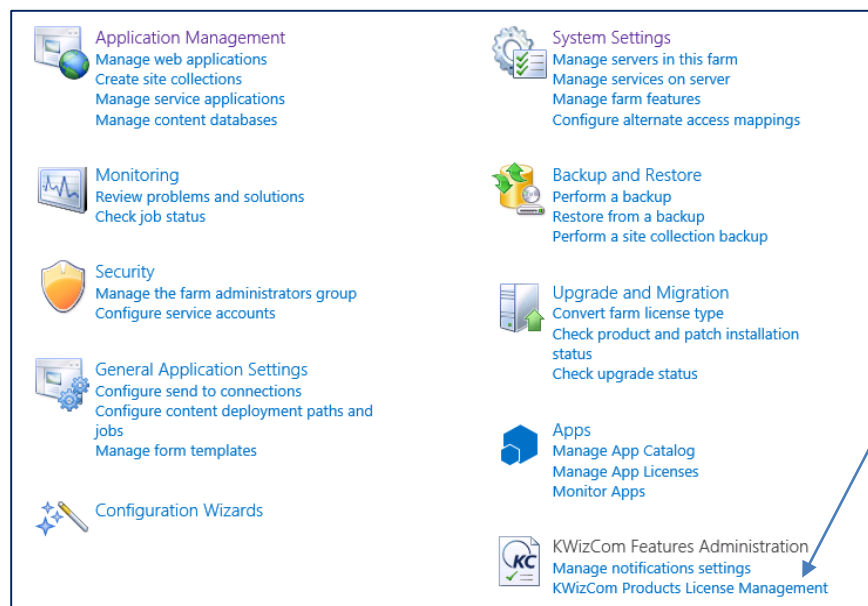
1. Order the product on the KWizCom website – www.KWizCom.com, or contact our sales team at sales@kwizcom.com.
2. After the order was made, activate your installed evaluation version through the Product Activation Request page on KWizCom's web site: <http://www.kwizcom.com/ProductReg>. You will have to copy your *Product Code* (you will see the product code on the "About" product page):



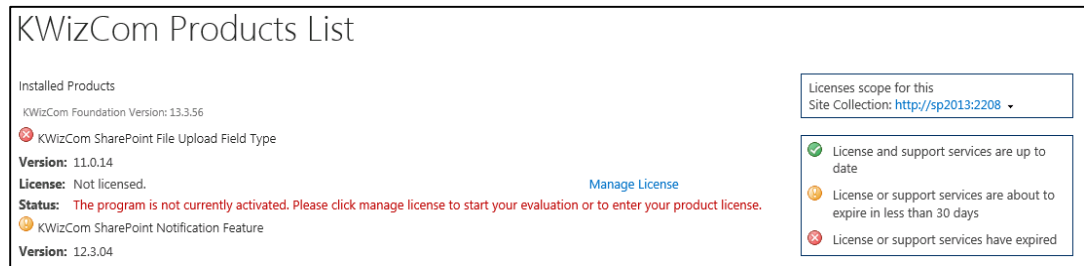
3. Get the component activation key – this key will be sent to you by email once your order is processed.
4. Activate your installed evaluation version -
click **Start -> All Programs -> KWizCom -> KWizCom SharePoint File Upload field type ->  Activate KWizCom SharePoint File Upload field type.**

SHAREPOINT 2010/2013

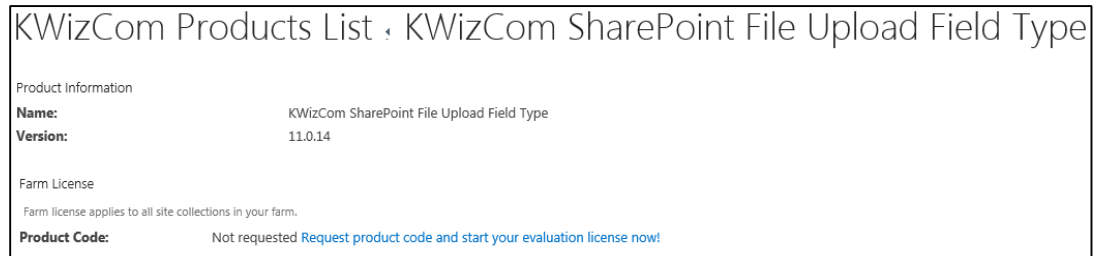
1. Order the product on the KWizCom website – www.KWizCom.com, or contact our sales team at sales@kwizcom.com.
2. After the order was made, you can activate your installed evaluation version. Activation is done by the following steps:
 - a. Open SharePoint Central Admin. On the main “Central Administration” page, you will see the “KWizCom Features Administration” icon:



- b. Click the “KWizCom Products License Management”. You will be redirected to a page that allows you to manage all your installed KWizCom products:



- c. Click the “Manage License” link next to the product that you wish to activate. You will be redirected to that product’s license management page:



- d. Click on the “Request product code and start your evaluation license now!” link
A Farm product code will be generated and displayed as in the following screenshot:



- e. Copy the product code.
- f. Browse the *Product Activation Request page* on KWizCom’s web site:
<http://www.kwizcom.com/ProductReg>.

Product Activation Request

In order to deactivate a product please [click here](#).

This Product Activation Form is used to get your product activation key after you have purchased the product.

Please fill out the following form. Once we get your product activation request, a product activation key will be sent to you by email, along with the activation process description.

*Customer Name:

*E-mail address:

*Share-It Order/Invoice Number:

*Product Code:

*License Type:

Copy your *Product Code* into the “Product Code” field, and after you fill-out all other form fields, click “Send Activation Request button.

- g. Once your order is confirmed, you will receive the Activation Code for your product by email.
- h. Copy the activation code into the “Activation Code” field in the product’s license management page and click “Activate now!” link.

That’s it! Your product is now fully activated.

CONFIGURING THE SHAREPOINT FILE UPLOAD FIELD TYPE

The File Upload field type enables attaching a single file to a list item. When you set-up the field, you can define which file types will be allowed and you can also define a file size limitation.

After you install the product, a new “File Upload” field type will be available in the “Create Column” list page.

Once you select the File Upload field type, you’ll be able to configure the following properties:

Name and Type Type a name for this column.	Column name: <input type="text" value="File"/>
Additional Column Settings Specify detailed options for the type of information you selected.	The type of information in this column is: File Upload
File upload settings Use this section to define which files are allowed to be uploaded using this field.	Description: <input type="text"/>
Field display settings Use this section to configure the way the connected file is displayed in the item's Edit/View forms.	Require that this column contains information: <input type="radio"/> Yes <input checked="" type="radio"/> No
	Enforce unique values: <input type="radio"/> Yes <input checked="" type="radio"/> No
	Allowed file types: <input type="text" value="pdf"/> Type a "," delimited list of file types. Example: "docx,pdf"
	Max file size (MB): <input type="text" value="3"/>
	<input type="checkbox"/> Hide the OOTB "Attach files" menu

Property	Explanation
Allowed file types	<p>If you wish to restrict the allowed file types, type a comma (",") delimited list of file types.</p> <p>Example: to allow users upload only MS WORD documents and PDF documents, type the following:</p> <p><code>docx, pdf</code></p>
Max file size (MB)	<p>Type a positive number that defines the maximum allowed attached file size in MB.</p> <p>REMARK: you cannot allow a bigger size than the Web Application defined limit.</p>
Hide the OOTB "Attach files" menu	<p>Check this property to hide the out-of-the-box "Attach File" menu, so that users will be able to attach files only by using this field.</p>

FAQ

WHAT IS THE “SHAREPOINT FILE UPLOAD” FIELD TYPE?

This is a custom field that enables users to upload a single file. As an administrator you can configure the field to allow uploading a file of specific type/s and of a size smaller than a defined limit.

WHICH SHAREPOINT EDITIONS ARE SUPPORTED BY THIS PRODUCT?

All 2007/2010/2013 editions: WSS 3.0 /Foundation Server and MOSS 2007/SharePoint 2010/2013 Server.

CAN I USE THE PRODUCT WITH BROWSERS OTHER THAN MICROSOFT INTERNET EXPLORER?

Yes!

You can use the product with additional browsers such as Firefox and Google Chrome.

TECHNICAL SUPPORT

You can obtain technical support using any of the following methods:

The KWizCom Web site

The KWizCom website: www.KWizCom.com contains up-to-date, valuable information, including:

- Answers to frequently asked questions (FAQ's) about our products – usability and technical questions.
- Product updates, which provide you with bug fixes and new features.

The Web Form

For technical support through the Internet, please complete and submit our [support web form on our web site](#).

For more information on technical support, please review our [support programs page](#).

KWizCom's global network of experts is always standing by, waiting to provide a rapid response for each customer query.