

KWizCom Corporation

SharePoint Conditional Formatting Field Type

User Guide

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Company Headquarters

KWizCom

95 Mural Street, Suite 600

Richmond Hill, Ontario

L4B 3G2, Canada

E-mail: info@KWizCom.com

Web site: <http://www.kwizcom.com>

Sales

E-mail: sales@KWizCom.com

Telephone: +1-905-370-0333

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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
- FAQ

PRODUCT OVERVIEW

The *SharePoint Conditional Formatting field type* enables you to better visualize content in your lists and libraries.

Tasks							
<input type="checkbox"/>	@	Type	Title	Assigned To	Status	Priority	Due Date
			Option number-1 <small>NEW</small>		Not Started	(2) Normal	4/7/2014
			Option number-2 <small>NEW</small>		Not Started	(2) Normal	4/7/2014
			Option number-3 <small>NEW</small>		Not Started	(2) Normal	
			Option number-4 <small>NEW</small>		Not Started	(2) Normal	4/10/2014
			Option number-5 <small>NEW</small>		In Progress	(2) Normal	4/10/2014
			Option number-6 <small>NEW</small>		Not Started	(2) Normal	
			Option number-7 <small>NEW</small>		Not Started	(2) Normal	
			Option number-8 <small>NEW</small>		Not Started	(2) Normal	
			Option number-9 <small>NEW</small>		Not Started	(2) Normal	
			Option number-10 <small>NEW</small>		Not Started	(2) Normal	
			Option number-11 <small>NEW</small>		Not Started	(2) Normal	4/7/2014
			Option number-12 <small>NEW</small>		Not Started	(2) Normal	
			Option number-13 <small>NEW</small>		Not Started	(2) Normal	
			Option number-14 <small>NEW</small>		Not Started	(2) Normal	
			Option number-15 <small>NEW</small>		In Progress	(2) Normal	4/10/2014
			Option number-16 <small>NEW</small>		Not Started	(2) Normal	4/10/2014
			Option number-17 <small>NEW</small>		Not Started	(2) Normal	
			Option number-18 <small>NEW</small>		Not Started	(2) Normal	

Once you add this column to your list, you'll be able to configure logic rules that color your list's selected columns or entire data rows.

WHY DID WE BUILD IT?

Configuring conditional formatting rules requires technical skills - using SharePoint Designer.

By using the KWizCom Conditional Formatting field type you can easily and quickly configure conditional formatting display rules as part of your list views without any development.

KEY FEATURES

Feature	Conditional Formatting field type
User-friendly, non-technical UI	✓
Configure conditional formatting rules for specific column	✓
Configure conditional formatting rules for entire rows	✓
Support dynamic tokens such as [Me] and [Today]	✓
Cross-browser	✓
Multi-lingual	✓

INSTALLATION GUIDE

SOFTWARE REQUIREMENTS

SERVER REQUIREMENTS

- SharePoint Server/Foundation 2010/2013

CLIENT REQUIREMENTS

- Microsoft Internet Explorer 9.0 +, Firefox (latest version), Google Chrome (latest version), Safari (Latest version).
- Windows 7+, Mac iOS (latest version)

INSTALLATION PROCEDURE

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

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.

3. 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), OR download the product WSP packages by clicking their links under the "Download Installable Packages" section.

After you manually download and unzip the product's WSP packages or use the web installer to download the product's packages, install the KWizCom product by simply running the "SP-

WSPInstaller” powershell script.

POST INSTALLATION

SHAREPOINT 2010/2013

A new Conditional Formatting column is available when you add a new list column.

UN-INSTALLATION PROCEDURE

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 related to KWizCom Conditional Formatting field type, including: product localization, product configuration and customization.

PRODUCT ACTIVATION

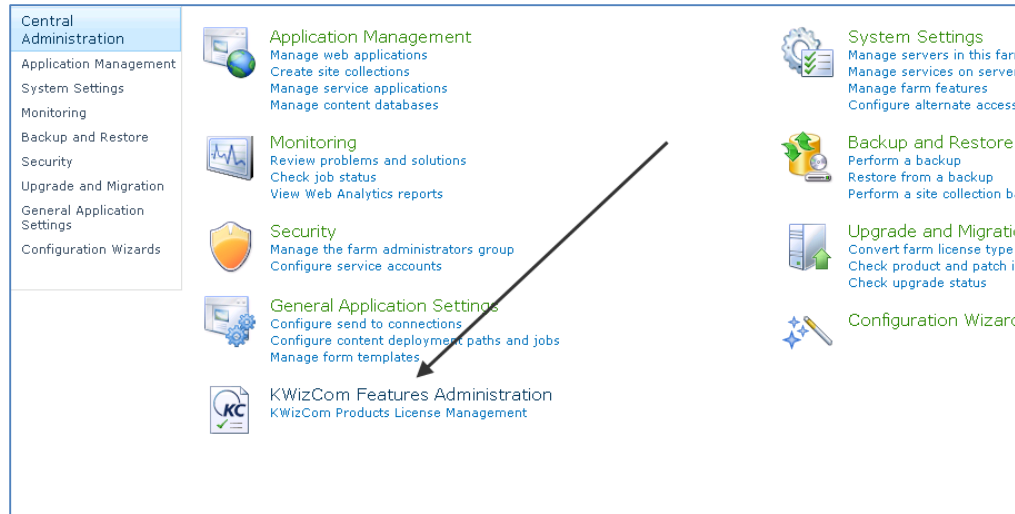
KWizCom products are available for evaluation prior to purchase.

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.

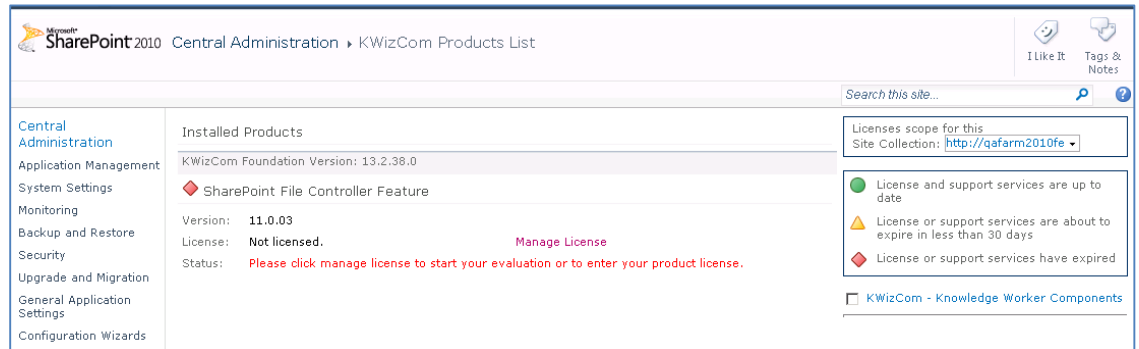
Once you decide to purchase a KWizCom component you will need to **order** and then to **activate** the product. The steps that need to be taken next are listed below.

SHAREPOINT 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 Features Administration icon. You will be redirected to a page that allows you to manage all your installed KWizCom products' licenses:



- 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:

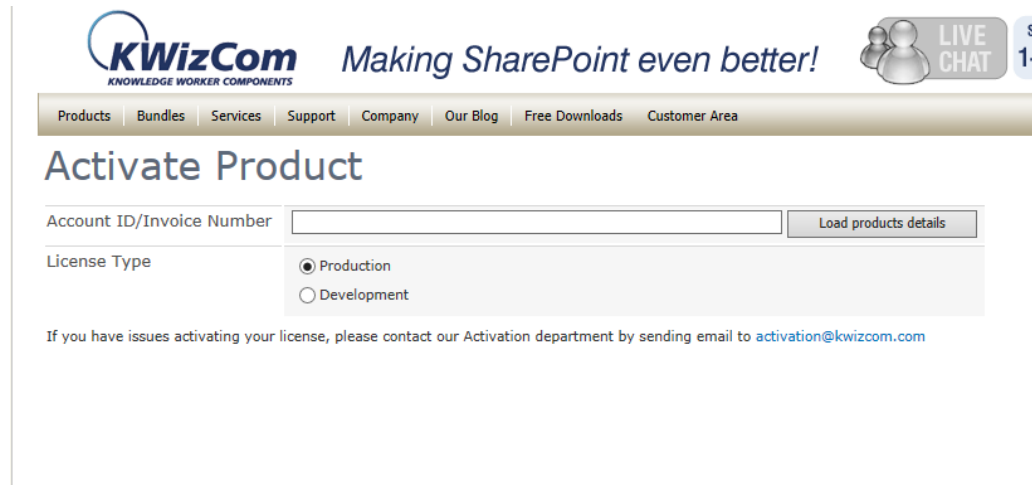
Product Information	
Name:	SharePoint File Controller Feature
Version:	11.0.03
Farm License	
Farm license applies to all site collections in your farm.	
Product Code:	Not requested Request product code and start your evaluation license now!
Web application or site collection license management	
If you have a license for one web application or site collection, you can enter it here. Simply choose the site collection you wish to activate the license on from the picker and enter the Site Collection: http://qafarm2010fe	
Use the form below to activate SharePoint File Controller Feature on one the selected site collection or web application only.	
Web Application License	
Web application license applies to all site collections under the same URL, for example: http://sharepoint, http://sharepoint/sites/sales etc...	
Product Code:	Not requested Request product code and start your evaluation license now!
Site Collection License	
Site collection license applies only to one specific site and it's sub sites.	
Product Code:	Not requested Request product code and start your evaluation license now!

- d. Click on the “Request product code and start your evaluation now” link, under the required license type (Farm, Web application, Site Collection).
A product code will be generated and displayed as in the following screenshot:

Product Information	
Name:	SharePoint File Controller Feature
Version:	11.0.03
Farm License	
Farm license applies to all site collections in your farm.	
Product Code:	TNWXV07J38[07QZMJUVEVHJ8MMEVH7QMM57885VVV5JVM-.5VQMUM.MM]MVNXJX Copy to clipboard
Activation Code:	<input type="text"/> Activate now!
License Notifications:	<input type="text"/> Update
Optionally, enter your email address to get notified when your license is exceeded or about to expire. To enter more than one email	
License type:	Evaluation
Expiration:	Thursday, November 18, 2010
Web application or site collection license management	
If you have a license for one web application or site collection, you can enter it here. Simply choose the site collection you wish to activate the license on from Site Collection: http://qafarm2010fe	
Use the form below to activate SharePoint File Controller Feature on one the selected site collection or web application only.	
Web Application License	
Web application license applies to all site collections under the same URL, for example: http://sharepoint, http://sharepoint/sites/sales etc...	
Product Code:	Not requested Request product code and start your evaluation license now!
Site Collection License	

- e. Copy the product code.

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



The screenshot shows the 'Activate Product' page on the KWizCom website. At the top, there is a navigation bar with links for Products, Bundles, Services, Support, Company, Our Blog, Free Downloads, and Customer Area. The main heading is 'Activate Product'. Below this, there is a form with two main sections. The first section is 'Account ID/Invoice Number', which includes a text input field and a 'Load products details' button. The second section is 'License Type', which has two radio button options: 'Production' (which is selected) and 'Development'. At the bottom of the form, there is a note: 'If you have issues activating your license, please contact our Activation department by sending email to activation@kwizcom.com'.

Fill-out and submit the form.

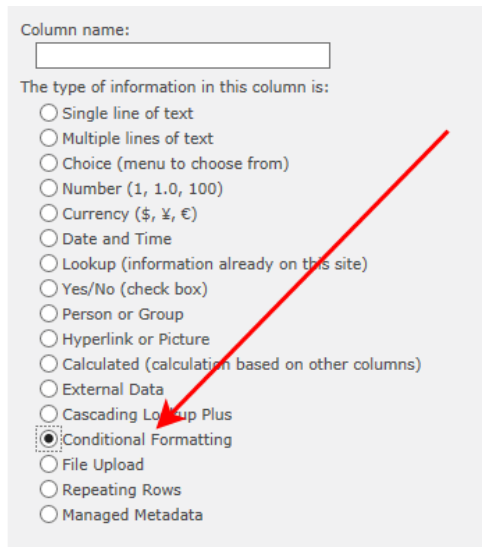
- g. Once your order is confirmed, you will receive the Activation Code for your product by email.
- h. Copy the activation code into the “Activation Code” field in the product’s license management page and click “Activate now!” link.

Product Information	
Name:	SharePoint File Controller Feature
Version:	11.0.03
Farm License	
Farm license applies to all site collections in your farm.	
Product Code:	TNWW07J8[07QZMJUVEVHJ8MMEVH7QJMM57885VVVV5JVM-.5VQMUM.MM]MVNXJX Copy to clipboard
Activation Code:	<input type="text"/> Activate now!
License Notifications:	<input type="text"/> Update
License type:	Evaluation
Expiration:	Thursday, November 18, 2010
Web application or site collection license management	
If you have a license for one web application or site collection, you can enter it here. Simply choose the site collection you wish to activate the license	
Site Collection:	http://qafarm2010fe ▼
Use the form below to activate SharePoint File Controller Feature on one the selected site collection or web application only.	
Web Application License	
Web application license applies to all site collections under the same URL, for example: http://sharepoint, http://sharepoint/sites/sales etc...	
Product Code:	Not requested Request product code and start your evaluation license now!
Site Collection License	
Site collection license applies only to one specific site and it's sub sites.	

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

CONFIGURING THE CONDITIONAL FORMATTING COLUMN

After you install the product on the SharePoint server, a new “Conditional Formatting” column will be available in the “Add Column” list page:

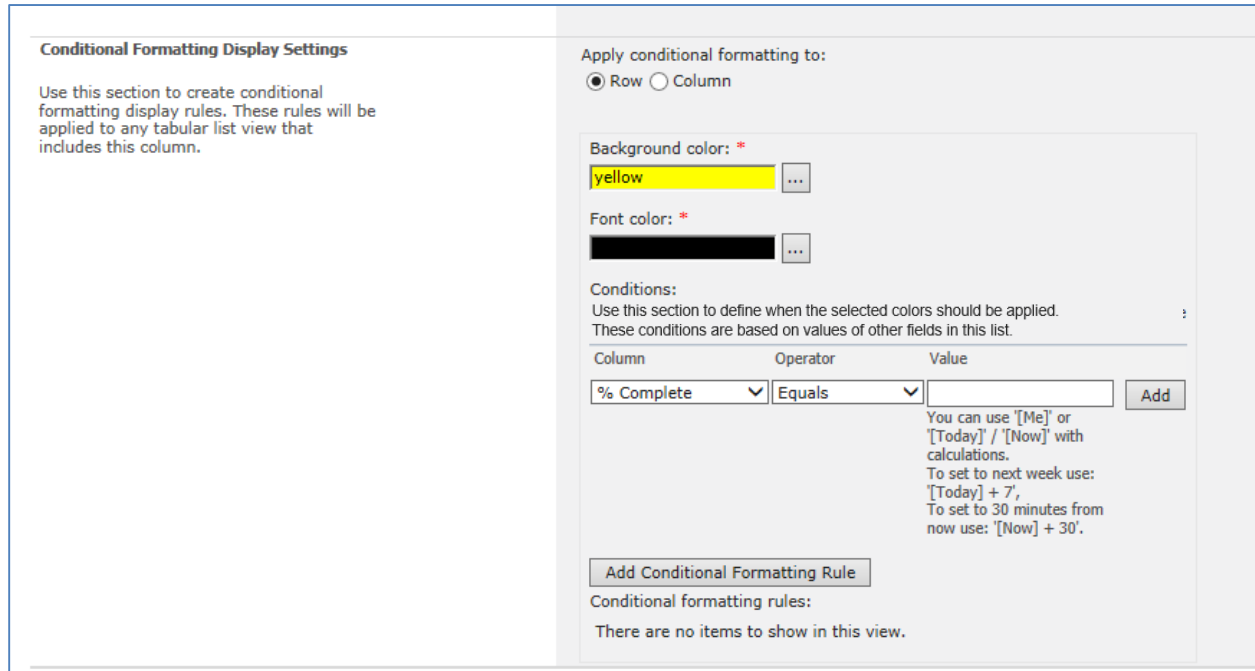


Column name:

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 (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- External Data
- Cascading Lookup Plus
- Conditional Formatting
- File Upload
- Repeating Rows
- Managed Metadata

Once you check this column type you will see the following settings page:



The following table describes each of the settings page properties:

Property	Description
Apply conditional formatting to	Select "Column" to apply all conditional formatting rules to a specific column in your list OR select "Row" to apply all conditional formatting rules to entire rows. If you select "Column" you'll be requested to select the column from a drop-down.
Background color	Background color that will be used in columns/rows that comply with the conditional formatting rule.
Font color	Font color that will be used in columns/rows that comply with the conditional formatting rule.
Conditions	Use this section to define logic conditions that will be tested against your list data.

Property	Description
Add Conditional Formatting Rule	<p>Click this button to add the configured rule.</p> <p>A Rule is a combination of several conditions. Data rows/columns that comply with these rules will get colored according to your configuration.</p> <p>You can configure several rules (each with its included conditions). In run-time, the conditional formatting rules are processed from the lower priority to the higher. If a row/column complies with several rules, that one with the highest priority number will be applied.</p>

FAQ

WHICH SHAREPOINT EDITIONS ARE SUPPORTED BY THIS PRODUCT?

All 2010/2013 editions (Foundation and Server).

CAN I USE KWIZCOM'S CONDITIONAL FORMATTING COLUMN WITH BROWSERS OTHER THAN MICROSOFT INTERNET EXPLORER?

Yes!

You can use the product with additional browsers such as Firefox, Safari 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.