

KWizCom Corporation



Default Values App

User Guide

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INTRODUCTION

GENERAL

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

- Product Overview
- Installation Guide
- Administration Guide

PRODUCT OVERVIEW

With the **Default Values app** you can configure default values for column types which do not have default values support with SharePoint out-of-the-box. You can also configure **dynamic default values**, meaning: different default values for different users/groups, and default values which depend on default values of other columns.

KEY FEATURES

Feature	KWizCom Default Values app	SharePoint Out-of-the-box
Configure default values for column types such as <i>Person</i> and <i>Lookup</i> (out-of-the-box SharePoint doesn't enable you to configure default values for these column types).	✓	
Configure different default values for different users/groups.	✓	
Use dynamic token and reference other columns' default values.	✓	

INSTALLATION

SOFTWARE REQUIREMENTS

SERVER REQUIREMENTS

- SharePoint Server/Foundation 2013 configured for app hosting
- SharePoint online (Office 365)

CLIENT REQUIREMENTS

- Windows 7+
- Microsoft Internet Explorer 9+, Mozilla Firefox (Latest version), Google Chrome (Latest version).

INSTALLATION PROCEDURE

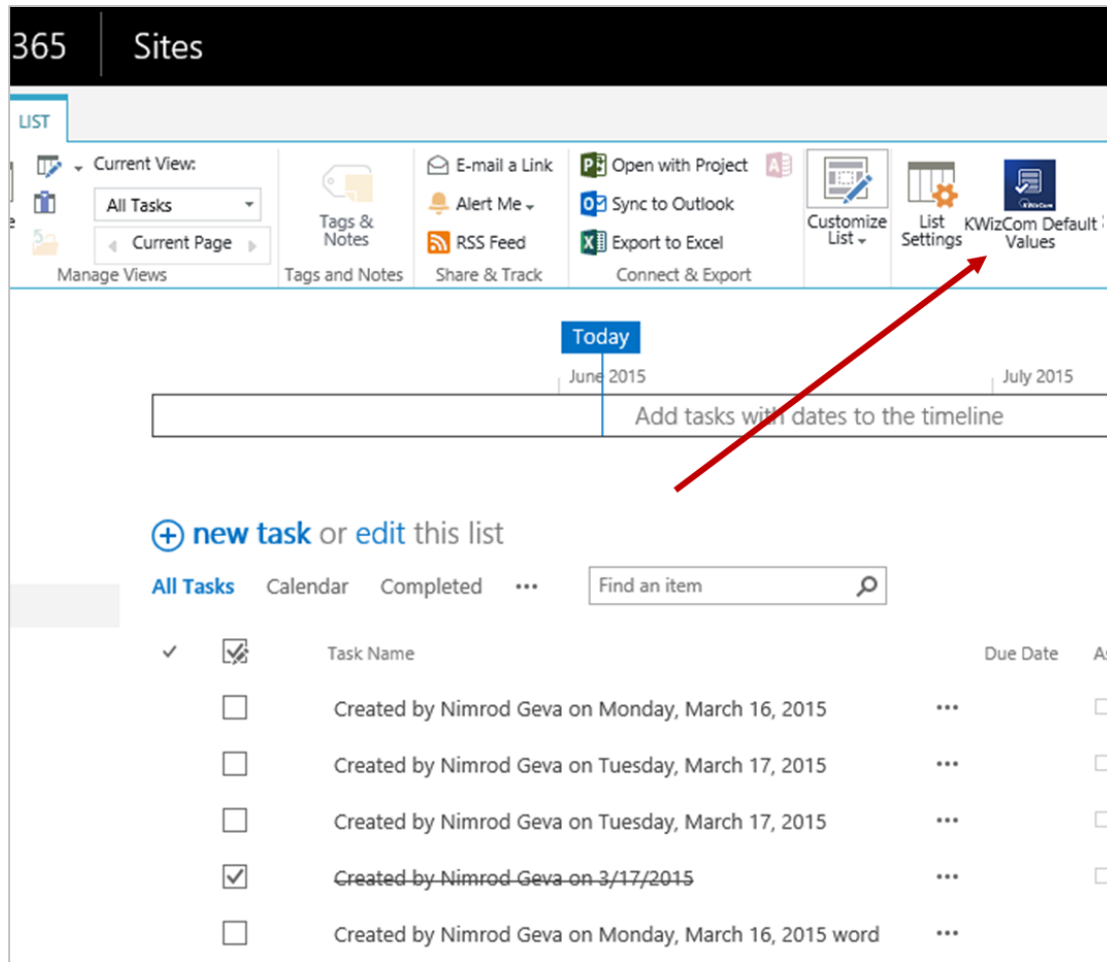
To download and install this app please follow these steps:

- Browse the product page on Microsoft's Office app store:
<https://store.office.com/kwizcom-default-values-WA104379376.aspx?assetid=WA104379376>
Install the free version. This version includes a message that indicates that this is a free trial version.

ADMINISTRATION GUIDE

SETTING-UP A FIELD DEFAULT VALUE

After you install the Default Values app, you will see its ribbon button in every list's "List" ribbon:



Clicking this ribbon button will open the list's Default Values settings page:

Task1 › Settings › Default Values

Set default values based on the current user and values of other fields. End-user will see these default values when creating a new item, they will be applied after SharePoint's default values are processed.

Add or Edit Default Values ▾

Select a Column. ⓘ

Assigned To ▾

Rules ⓘ

[+ new rule](#)

Options

Default Value

[Me]

Conditions

new condition

[set Assigned To to \[Me\]](#)

ⓘ When setting conditions for user fields you can utilize the '[Me]' token and it will be replaced at runtime by the current user.

ⓘ When setting conditions for date time fields you can utilize the '[Today]' token and it will be replaced at runtime by the current date. It is also possible to add/subtract days to the current date using the '[Today]' token. For example, '[Today] + 5' would be replaced by today's date plus 5 days.

All Rules ▾

[Edit](#) [set Task Name to 'Created by \[Me\] on \[Today\]'](#)

[Edit](#) [set Assigned To to '\[Me\]'](#)

[Edit](#) [set Description to 'This is a task created by someone in the members group' when \(Current user in 'Members' AND Content type is equal to 'Task'\)](#)

[Otherwise set Description to 'This is a task created by someone NOT in the members group' when \(Current user not in 'Members' AND Content type is equal to 'Task'\)](#)

[CLEAR SETTINGS](#) [CANCEL](#) [APPLY](#) [SAVE](#)

This settings page allows you to create default value rules, each rule defines a default value for a field, depending on various conditions.

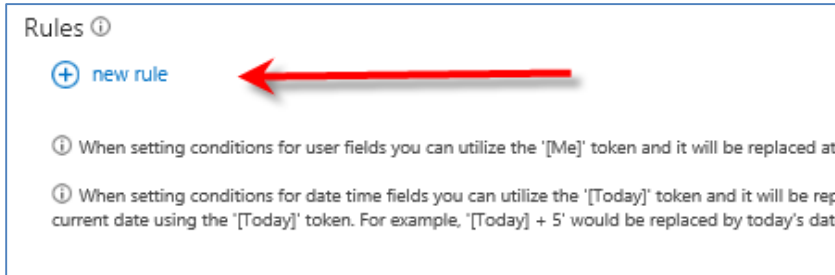
To setup a Default Value rule, follow these steps:

1. Select a column for which you wish to set up a default value, in the “Select a column” drop-down:

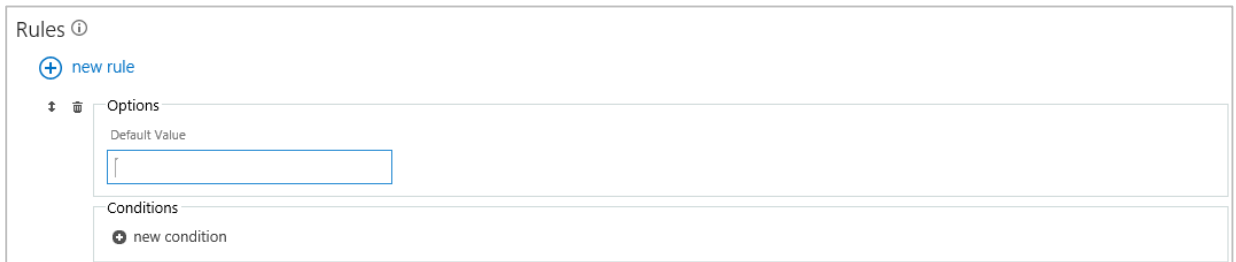
Select a Column. ⓘ

Assigned To ▾

2. Create a new rule by clicking the “new rule” link:



- a new rule definition section will appear:



3. To setup a rule you need to:

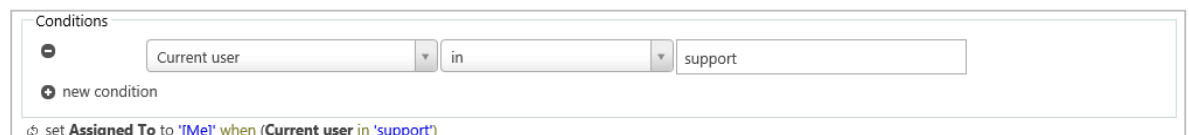
- a. Type/select a default value for the selected column.

Depending on the column type, the Default value control will display the appropriate control.

In this example, the column is of “Assigned To”, so a Person field control appears.

- b. Setup conditions

These conditions define when the field validation rule should be applied.



4. After you save the rule by clicking “Apply” or “Save” this rule will appear below the “All Rules” section:

All Rules ▾	
Edit	set Task Name to 'Created by [Me] on [Today]'
Edit	set Assigned To to '[Me]'
Edit	set Description to 'This is a task created by someone in the members group' when (Current user in 'Members' AND Content type is equal to 'Task')
Edit	Otherwise set Description to 'This is a task created by someone NOT in the members group' when (Current user not in 'Members' AND Content type is equal to 'Task')
Edit	set Due Date to '[StartDate]'

To edit an existing rule, simply click the “Edit” link appearing on the left side of each existing rule.