

KWizCom Corporation



Field Constraints 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 **Field Constraints app** you can easily configure field-validation rules to enforce input patterns according to your required form logic: Email, field length, IP address, zip code value ranges and any other custom pattern.

These field validation rules are processed when a user saved a list form (New Item or the Edit Item form).

KEY FEATURES

Feature	KWizCom Field Constraints app	SharePoint Online
Validate Lookup and Person columns.	✓	
Validate a field value comparing to a regular expression.	✓	
Manage and share custom validation rules across your organization.	✓	
Dynamic validation rules: validation rules that are conditionally applied, depending on values of other fields and current user.	✓	
Save field permission settings within site and list templates	✓	

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

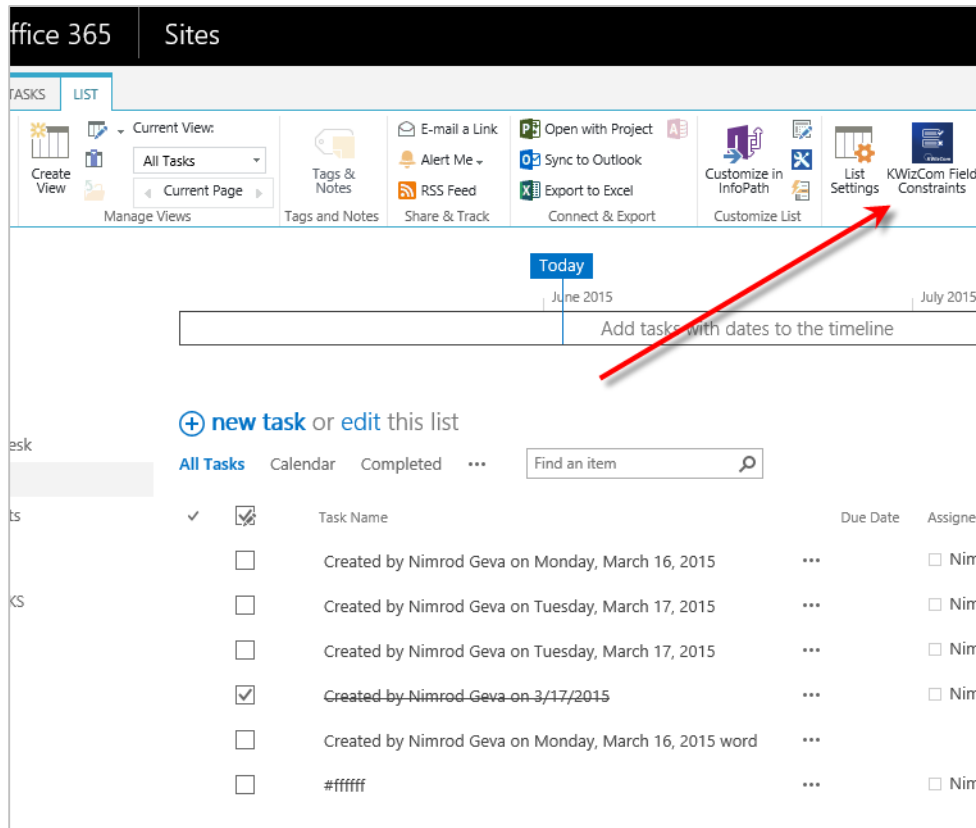
To download and install this app please follow these steps:

- Browse the product page on Microsoft's Office app store:
<https://store.office.com/kwizcom-field-constraints-WA104379411.aspx?assetid=WA104379411>
- Install the free version. This version includes a message that indicates that this is a free trial version.

ADMINISTRATION GUIDE

SETTING-UP A FIELD CONSTRAINT

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



Clicking this ribbon button will open the list's Field Constraints settings page:

Task1 › Settings › Field Constraints

Use this settings page to create validation rules to make sure forms are saved with valid field values, according to your business logic.

Add or Edit Field Constraints -

Select a Column. ⓘ

Due Date

Rules ⓘ

+ new rule

Operator	Value
is greater than	[StartDate]

Error Message
Due Date must be later than Start Date

Highlight field

Conditions
● new condition

ⓘ validate Due Date is greater than '[StartDate]'. If not valid show 'Due Date must be later than Start Date' and highlight Due Date

ⓘ 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: validate Task Name matches pattern 'HTML Color Codes'. If not valid show 'your title must be an html color code in the format #xxxxxx' and highlight Task Name

Edit: validate Due Date is greater than '[StartDate]'. If not valid show 'Due Date must be later than Start Date' and highlight Due Date

CLEAR SETTINGS CANCEL APPLY SAVE

This settings page allows you to create field validation rules, each rule validates an input pattern for a selected field. After you have configured your rules and saved them, these rules will be processed according to their order every time user saves a list form.

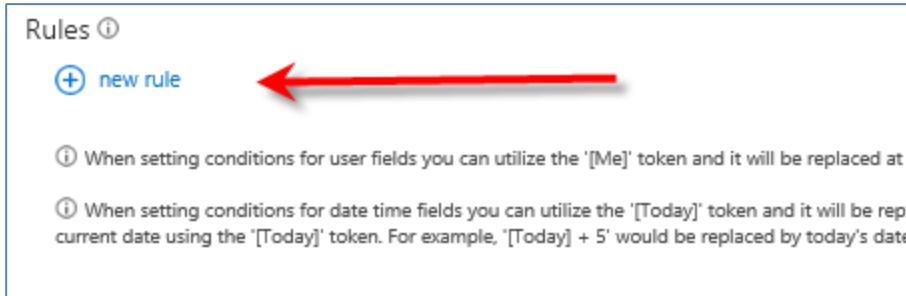
To setup a field constraints rule, follow these steps:

1. Select a column that you wish to validate in the “Select a column” drop-down:

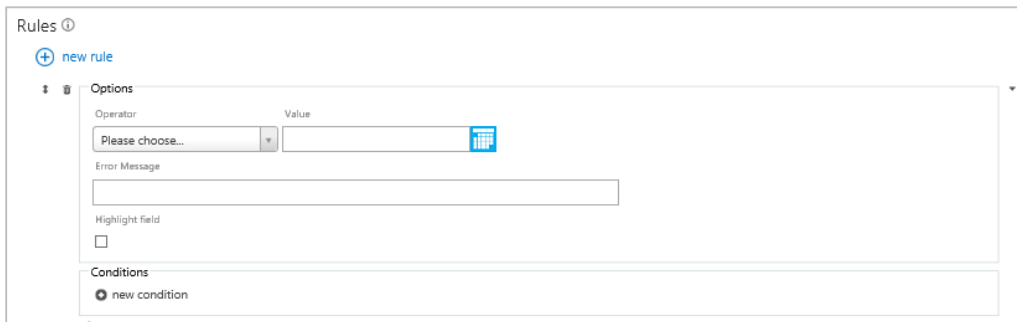
Select a Column. ⓘ

Description

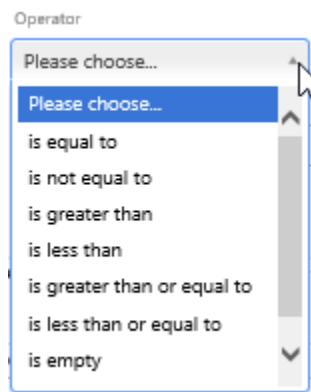
2. Create a new rule by clicking the “new rule” link:



a new rule definition section will appear:



3. To setup a rule you need to:
 - a. Select validation operator



COMMENT: depending on the current column type, different validation operators will be available.

- b. Select/type the value for the validation rule



The validation control depends on the validated column type. In the screenshot above you see a textbox with a date picker because the validated column in this rule is a date column.

As you can see in this example, you can also use tokens, including column names, surrounded by brackets “[]”.

- c. Type the validation error message



This error message will be displayed to the user who tries to save the form with value that does not match the validation rule.

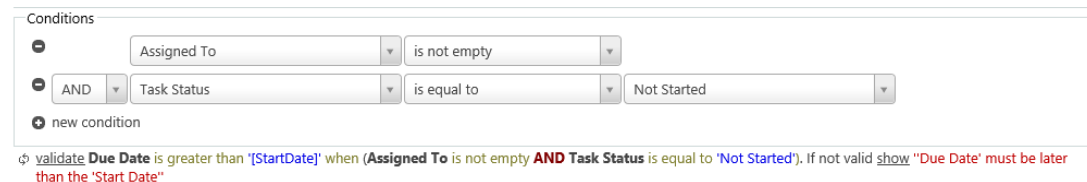
- d. Highlight field



Check this checkbox if you want the field to be highlighted when the validation error occurs.

- e. Setup conditions

These conditions define when the field validation rule should be applied. You can create several conditions as you can see in the following screenshot:



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

The screenshot shows a rule configuration window. At the top, there is a rule definition: "AND Task Status is equal to Not Started". Below this, there is a "new condition" button and a rule text: "validate Due Date is greater than [StartDate] when (Assigned To is not empty AND Task Status is equal to 'Not Started'). If not valid show 'Due Date' must be later than the 'Start Date'".

Below the rule text, there are two informational notes:

- ① When setting conditions for user fields you can utilize the '[Me]' token and it will be replaced at runtime by the current user.
- ① 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.

Below the notes, there is a section titled "All Rules" with a dropdown arrow. Under this section, there are two rules listed, each with an "Edit" link on the left:

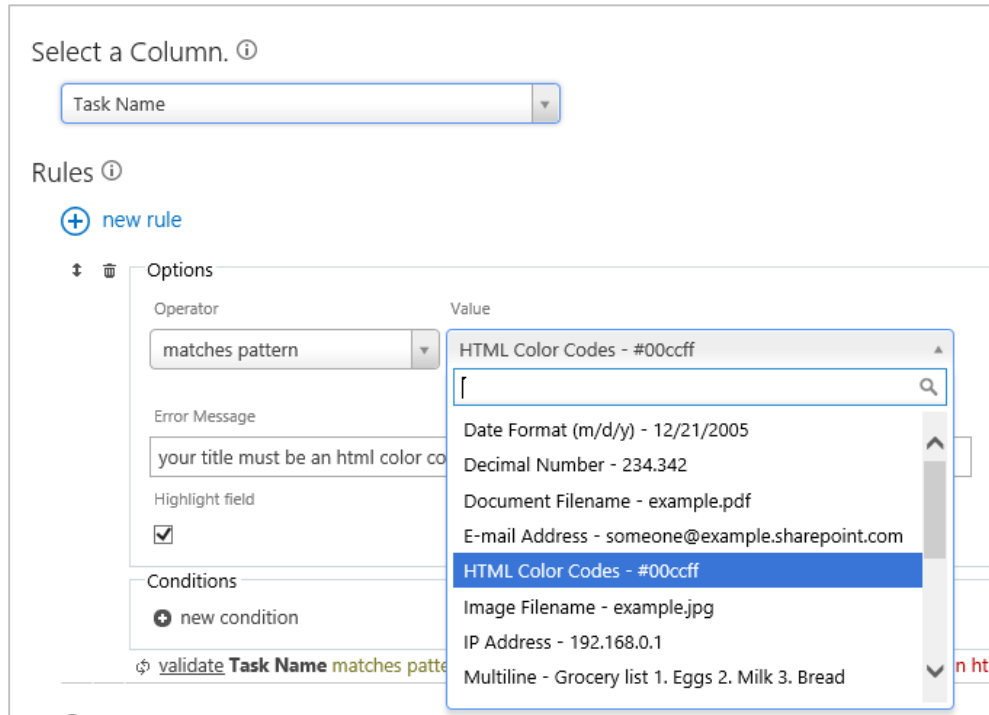
- Edit** validate Task Name matches pattern 'HTML Color Codes'. If not valid show 'your title must be an html color code in the format #xxxxxx' and highlight Task Name
- Edit** validate Due Date is greater than [StartDate] when (Assigned To is not empty AND Task Status is equal to 'Not Started'). If not valid show 'Due Date' must be later than the 'Start Date'

At the bottom of the window, there are four buttons: "CLEAR SETTINGS" (highlighted in red), "CANCEL", "APPLY", and "SAVE". A red arrow points from the top right towards the "Edit" link of the second rule in the "All Rules" list.

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

USING CUSTOM PATTERNS

When validating text fields, there's an additional operator that you can use called "matches pattern":

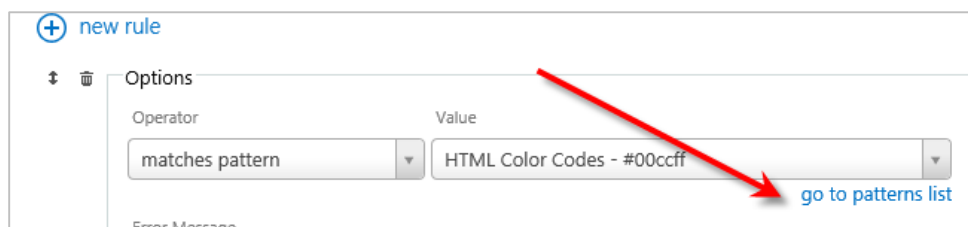


When selecting the "matches pattern" operator a list of various input pattern appear as possible values. These pattern enable you validate the text field's input pattern and compare it to common patterns such as Date, Email, file names and more.

All of these patterns are located in a list; this makes it easy to share these custom patterns, and also add a new custom pattern of your own.

CREATING A NEW CUSTOM PATTERN

To create a new pattern, click the "go to patterns list" link below the "Value" control:



The Regex editor popup will appear:

Regex editor

[+ new regular expression](#)

Name

Regular Expression ⓘ

Modifiers ⓘ
 Ignore Case (/i) Global (/g) Multiline (/m)

Test Value

Regular Expression Library ▾

Name	Regular Expression	Example
Edit Date Format (m/d/y)	<code>/^([d]{1}[0,1,2])/([0-9]{1}[0,1,2])/([0-9]{3}[0,1])/d{4}\$/i</code>	12/21/2005
Edit Decimal Number	<code>/^d+[0-9](\,d+[0-9])?\$/i</code>	234.342
Edit Document Filename	<code>/^[a-zA-Z0-9-_.\,]+\.(pdf txt doc csv)\$/i</code>	example.pdf
Edit E-mail Address	<code>/^([0-9a-zA-Z]+([_.-]?[0-9a-zA-Z]+)*)@[0-9a-zA-Z]+([0-9,a-z,A-Z,-]*){1}[a-zA-Z]{2,4}\$/i</code>	someone@example.sharepoint.com

This popup enables you to create new custom patterns (based on regular expressions), as well as to edit existing custom patterns.

To create a new custom pattern fill-out the following fields under the “new regular expression” section:

[+ new regular expression](#)

Name

Regular Expression ⓘ

Modifiers ⓘ
 Ignore Case (/i) Global (/g) Multiline (/m)

Test Value

- Name – the new custom pattern’s name (should be clear to other users)
- Regular Expression – A valid regular expression string.
- Modifiers – Check the relevant options for your custom pattern.
- Test value – Type a value that should match your pattern, you will see an immediate feedback if it does match or not.

To save your new custom pattern click the “SAVE” button at the top of the Regex editor popup.