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**

<table>
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<th>Feature</th>
<th>KWizCom Field Constraints app</th>
<th>SharePoint Online</th>
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<tr>
<td>Validate Lookup and Person columns.</td>
<td>√</td>
<td></td>
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<tr>
<td>Validate a field value comparing to a regular expression.</td>
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<tr>
<td>Manage and share custom validation rules across your organization.</td>
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<tr>
<td>Dynamic validation rules: validation rules that are conditionally applied, depending on values of other fields and current user.</td>
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<td>Save field permission settings within site and list templates</td>
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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:
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:
2. Create a new rule by clicking the “new rule” link:

![New Rule Section]

- When setting conditions for user fields you can utilize the `[Me]` token and it will be replaced at run time.
- When setting conditions for date time fields you can utilize the `[Today]` token and it will be replaced with current date using the `[Today]` token. For example, `[Today] + 5` would be replaced by today’s date.

A new rule definition section will appear:

![Rule Definition Section]

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

![Operator Selection]

**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:
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 patterns 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:

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:
- 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.