

KWizCom Corporation



Field Groups/Tabs App

User Guide

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Company Headquarters

KWizCom

95 Mural Street, Suite 600

Richmond Hill, ON

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:

- Product Overview
- Installation Guide
- Administration Guide

PRODUCT OVERVIEW

With the Field Groups App for SharePoint 2013/Office 365, end-users can easily create great-looking, multi-tab forms in no more than a few minutes!

KEY FEATURES

Feature	KWizCom Field Constraints app	SharePoint 2013/ Online
Target audience	Non-technical end-users	Power-users using technical tools such as InfoPath
Create multi-tab forms	√	
Create forms with collapsible frames (Accordion)	√	
Tab permissions: Tabs can be displayed only to specific users/groups	√	
Flexible multi-column layout	√	
Inherit SharePoint theme	√	if using InfoPath or other external form tool - you'll need to design your form manually

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

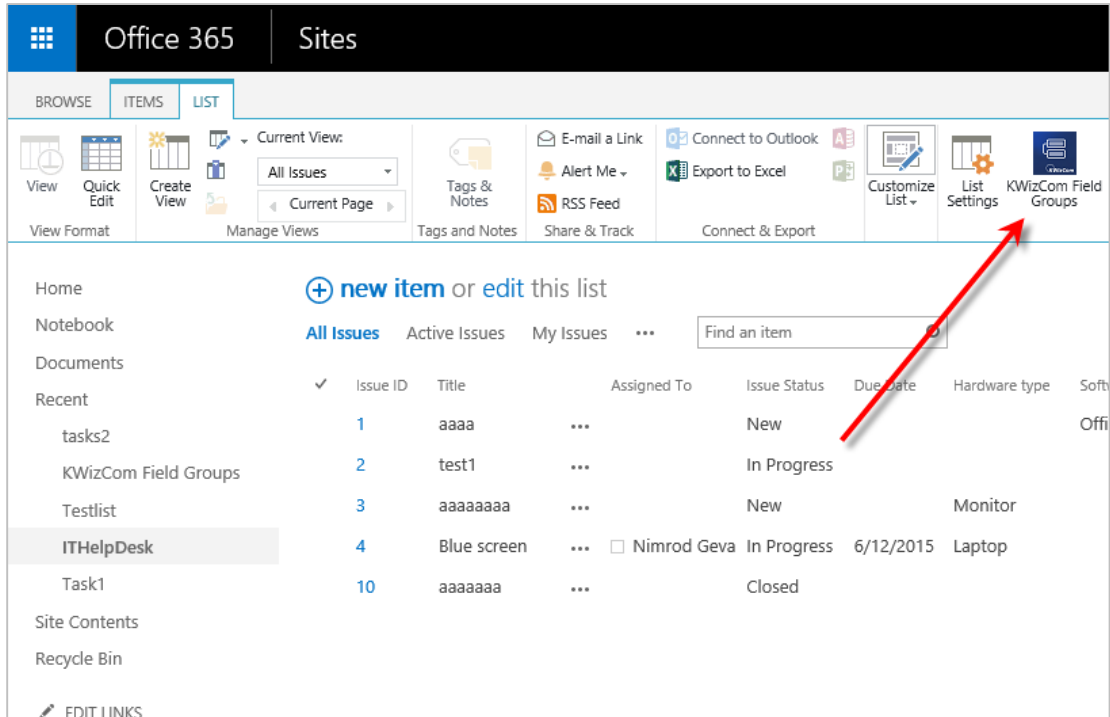
To download and install this app please follow these steps:

- Browse the product page on Microsoft's Office app store:
<https://store.office.com/kwizcom-field-groups-WA104379507.aspx?assetid=WA104379507>
- 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 Groups settings page:

ITHelpDesk > Settings > Field Groups

Arrange your form fields in groups, configure how these groups will be displayed and set permissions for groups. You can also customize the layout of each tab separately.

Add or Edit Field Groups ▾

General Group Settings ⓘ

Field caption location:

Default number of fields per row: ⓘ

Display groups as:

Hide group if all fields invisible to user

Add "All fields" group

Groups ⓘ

[+ new group](#)

- show Issue details
- show Issue resolution

ⓘ 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.

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

This settings page allows you to customize the form’s layout and to divide your form into groups. Each group includes columns, and these groups can be then configured to be displayed as tabs or collapsible sections.

GENERAL DISPLAY SETTINGS

These properties affect the entire New/Edit/View forms:

General Group Settings ⓘ

Field caption location:

Default number of fields per row: ⓘ

Display groups as:

Hide group if all fields invisible to user

Add "All fields" group

Property	Description
Field caption location	By default SharePoint field captions appear near their fields. You can setup the field captions to appear above their fields.
Default number of fields per row	This property allows you to turn your form to a multi-column form by increasing the number of fields in a row.

Display groups as	If you create groups, you can display these field-groups as tabs or as collapsible sections.
Hide group if all fields invisible to user	Check this property if you want a field-group to be hidden in case all its included fields are hidden. This is relevant only if you have KWizCom Column app or KWizCom Forms app installed.
Add "All fields" group	Check this property if you want to have an additional group that displays all fields. This option is usually used for testing when you are creating your forms.

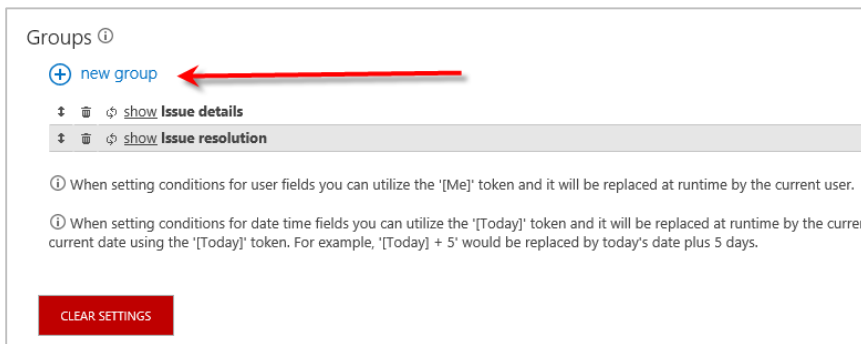
GROUPS

Use this section if you want to divide your form into sub-section/tabs.

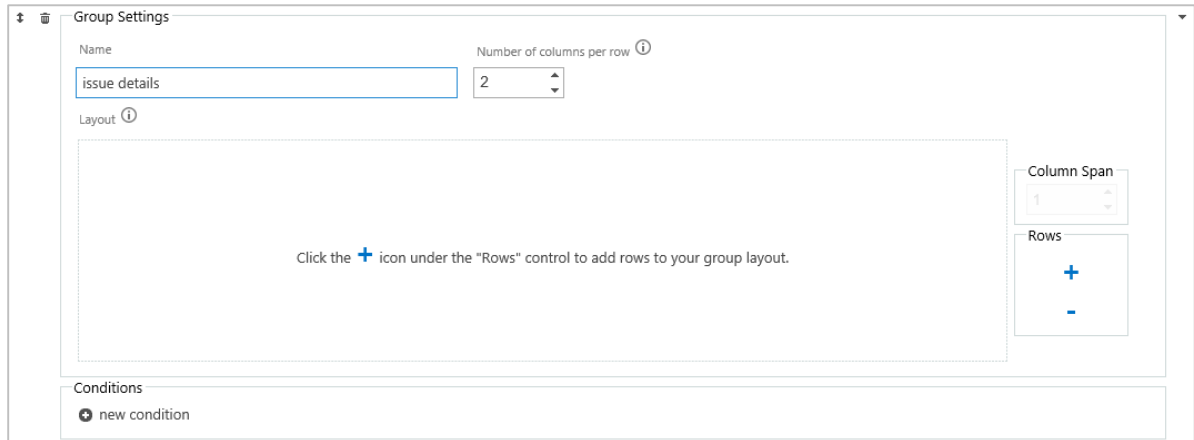
In order to do it you need to create groups. Each group includes selected fields, and a layout that you can configure.

To create a new group:

1. click the "new group" link:

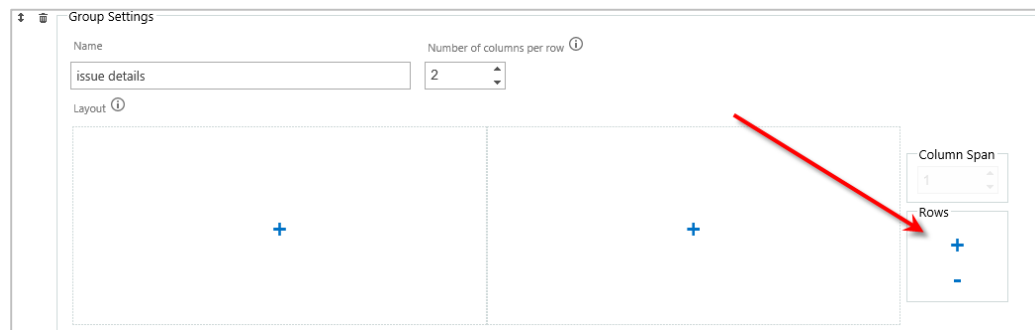


2. Give the group a name (will be displayed as the title of your group):



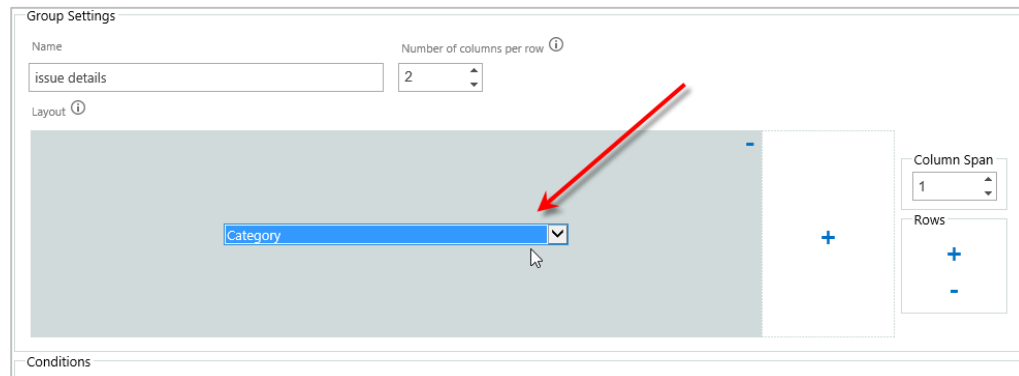
3. Now, under “Layout” you’ll see an empty grid that allows you to create cells and locate fields in them. Here’s how you should start configuring your field group’s layout:

- a. Setup the “Number of columns per row” property:
This defines how many fields will be displayed in a row. You can change this per-group.
- b. Add rows to your empty grid:
to add/remove rows click the “+” or “-” icons under the “Rows” control on the right side:

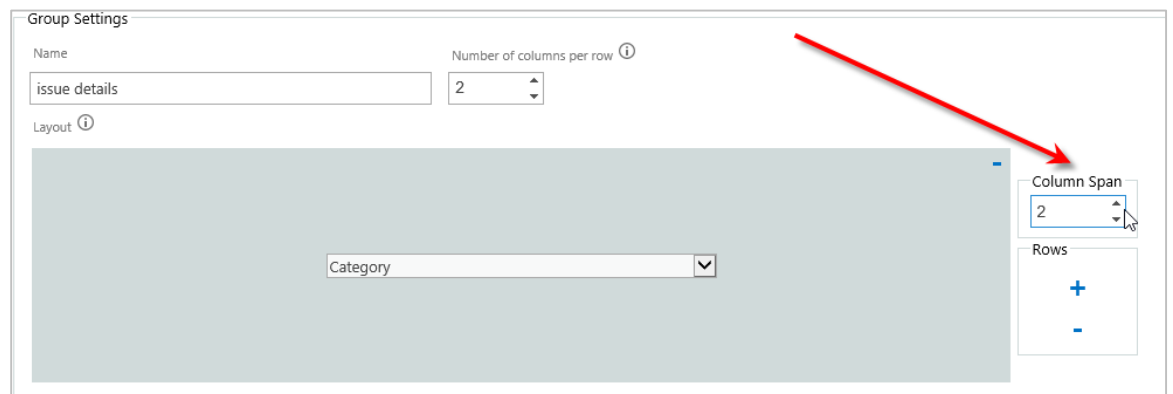


after you add a rows you will see the row’s empty cells with “+” icon in each one of them.

- c. To add a row below an existing row – click a row under which you want to add a new row and then click the + icon below the “Rows” section.
- d. To remove a row – click the row that you want to remove and then click the - icon below the “Rows” section.
- e. To display a field in a cell simply click the cell’s “+” icon, it’ll display a drop-down with all existing field – choose the field that you want to display in the cell:



- f. If you want a field to span over several columns because you want it to be wider, click the cell that contains the field and then use the “Column Span” control to configure the amount of column this field will span:



- g. To save your settings click “Apply” or “OK” at the bottom of the settings page.

To configure group's visibility:

Under each group's "layout" section you'll see the "Conditions" section:

The screenshot displays the 'Options' section of the KWizCom interface. It includes a 'Group Name' field with 'Issue details' entered. Below this is the 'Layout' section, which features a grid of fields: 'Columns' (set to 2), 'Column Span' (set to 2), 'Title', 'Description', 'Reported By', 'Category', 'Hardware type', and 'Software type'. A red arrow points from the 'Description' field to the 'new condition' link in the 'Conditions' section at the bottom. The 'Conditions' section also includes a '+ new condition' button.

Each group may have multiple conditions that define when the group will become visible.

To create a condition:

1. Click "new condition" link.
2. Configure your condition by select columns and operators to define a logic criteria.
You can have multiple conditions.
3. To save your settings click "Apply" or "OK" at the bottom of the settings page.