

KWizCom Corporation

# **KWizCom Forms App**

## **User Guide**

Copyright © 2005-2017 KWizCom Corporation. All rights reserved.

**Company Headquarters**

KWizCom

95 Mural Street, Suite 600

Richmond Hill, ON

L4B 3G2 Canada

E-mail: [info@KWizCom.com](mailto:info@KWizCom.com)

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

**Sales**

E-mail: [sales@KWizCom.com](mailto:sales@KWizCom.com)

Telephone: +1-905-370-0333

## CONTENTS

Contents .....	3
introduction .....	4
General .....	4
Product Overview .....	5
Key Features .....	5
Installation .....	7
Software Requirements .....	7
Server Requirements .....	7
Client Requirements .....	7
Installation Procedure .....	7
Administration Guide .....	8
Overview .....	8
Import/Export KWizCom Forms Settings .....	11

## 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

KWizCom Forms App wipes out the limitations of SharePoint Online list forms, adding exciting new features with advanced capabilities, turning SharePoint list forms into powerful application forms, customizable to suite your needs!

## KEY FEATURES

Feature	KWizCom Forms App		
	Std.	Pro.	Ent.
Display/hide fields from list forms (New/Edit/View item) to/from specific users or SharePoint groups.	+	+	+
Display/hide columns in list views	+	+	+
Display/hide fields from list forms according to some dynamic criteria based on list fields' values (the item's status)	+	+	+
Support [Me] and [Today] SharePoint tokens in field-based criteria for hiding/disabling fields	+	+	+
Enable defining default values for all types of fields (Including Person and Lookup types)	+	+	+
Enable defining Dynamic default values: Different default depending on the current user and other fields' default values.	+	+	+
Enable defining field validation rules (constraints).	+	+	+
Enable defining field validation rules (constraints) including custom regular expressions.	+	+	+
Enable defining field validation rules, depending on other field values (dynamic rules).	+	+	+
Enable defining custom field default values, depending on the current user.	+	+	+
Enable dividing list form's fields into several pages (tabs).	+	+	+
Support list view permissions.		+	+
Support navigation between list items, in Edit and View modes		+	+
Cascaded lookup fields in your forms (Region > Country > City)		+	+

Multi-row forms		+	+
Custom actions			+
Cross-browser compatible (IE, Firefox & Google Chrome)	+	+	+

## INSTALLATION

### SOFTWARE REQUIREMENTS

#### SERVER REQUIREMENTS

- SharePoint Server 2013/2016 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

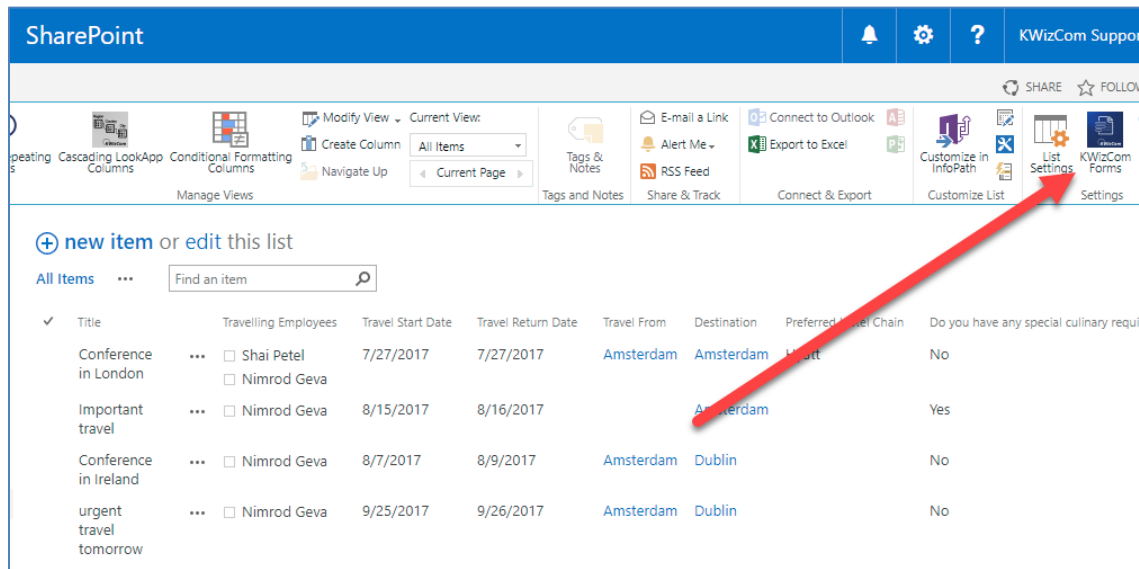
To download and install this app please follow these steps:

- Browse the product page on Microsoft's Office app store:  
<https://appsource.microsoft.com/en-us/marketplace/apps?src=office&search=kwizcom&page=1>
- Install the free version. This version includes a message that indicates that this is a free trial version.

## ADMINISTRATION GUIDE

### OVERVIEW

After you install the KWizCom Forms app, you will see its ribbon button in every list and document library “List” ribbon:




Clicking the ribbon button will redirect you to the KWizCom Forms settings page:




Travel Requests › Settings › Forms Settings


Let's then configure list forms to make them feature-rich, great looking web forms.




**Dynamic Column Permissions**  
Show/Hide/Disable fields based on dynamic conditions. This enables you to create a dynamic form that displays relevant fields, depending on the current user and context.




**Field Constraints**  
Configure dynamic field validation rules, based on various conditions.




**Default Values**  
Set default values based on the current user and values of other fields.




**Field Groups/Tabs**  
Arrange your form fields in groups, configure how these groups will be displayed and set permissions for groups.




**View Permissions (Professional Edition)**  
Hide selected list views from selected users/groups.




**Form Quick Navigation (Professional Edition)**  
Enable end-users to quickly navigate between the list's Edit/View forms and save a lot of time.




**Repeating Rows (Professional Edition)**  
Use this settings page to create and manage repeating rows columns in your list.




**Cascading LookApp (Professional Edition)**  
Use this settings page to add/edit KWizCom Cascading LookApp columns to lists on this site.



**Custom Actions (Enterprise Edition)**  
Create processes triggered by user-click or automatically by other events. Each custom action includes a series of conditioned activities, enabling you to implement your required use-case.



**Activities (Enterprise Edition)**  
Easily create customized activities to be used in custom actions.



**Export/Import Settings**  
Use these options to move this list's settings to another list, or import a settings file to this list.

CLEAR SETTINGS ↑

This settings page displays all the configuration options available, in accordance with your purchased edition (std., pro. or ent.).

The following table lists the available settings:

Settings	What does it do
Dynamic Column Permissions	Show/Hide/Disable fields based on dynamic conditions. This enables you to create a dynamic form that displays relevant fields, depending on the current user and context. <a href="#">More Details.</a>
Field Constraints	Configure dynamic field validation rules, based on various conditions. <a href="#">More Details.</a>

Default Values	Set default values based on the current user and values of other fields. <a href="#">More Details.</a>
Field Groups/Tabs	Arrange your form fields in groups, configure how these groups will be displayed and set permissions for groups. <a href="#">More Details.</a>
View Permissions (Pro.)	Hide selected list views from selected users/groups.
Form Quick Navigation (Pro.)	Enable end-users to quickly navigate between the list's Edit/View forms and save a lot of time.
Repeating Rows (Pro.)	Use this settings page to create and manage repeating rows columns in your list. <a href="#">More Details.</a>
Cascading LookApp (Pro.)	Use this settings page to add/edit KWizCom Cascading LookApp columns to lists on this site. <a href="#">More Details.</a>
Custom Actions (Ent.)	Create processes triggered by user-click or automatically by other events. Each custom action includes a series of conditioned activities, enabling you to implement your required use-case. <a href="#">More Details.</a>
Activities (Ent.)	Easily create customized reusable activities to be used in custom actions. <a href="#">More Details.</a>
Export/Import settings	Use these options to move this list's settings to another list, or import a settings file to this list. More details available later in this guide.
Clear Settings	Click this red button if you wish to reset your list and delete all KWizCom Forms settings for that list. This will NOT delete any data, just the enhanced form features. After you cleared settings your list/library forms will revert to the out-of-the-box SharePoint list layout without the additional KWizCom Forms features.

## IMPORT/EXPORT KWIZCOM FORMS SETTINGS

With KWizCom Forms you can export some configured list's forms settings and import it in another list (or in the same list if you want).

### When do we need to export/import list's forms settings?

- Apply KWizCom Forms settings configured in dev/test environment to your production environment.
- Manage forms settings versions – by exporting your list forms settings everytime you make changes, you can later revert to any saved settings by importing the required settings file.

### Where are KWizCom Forms settings saved?

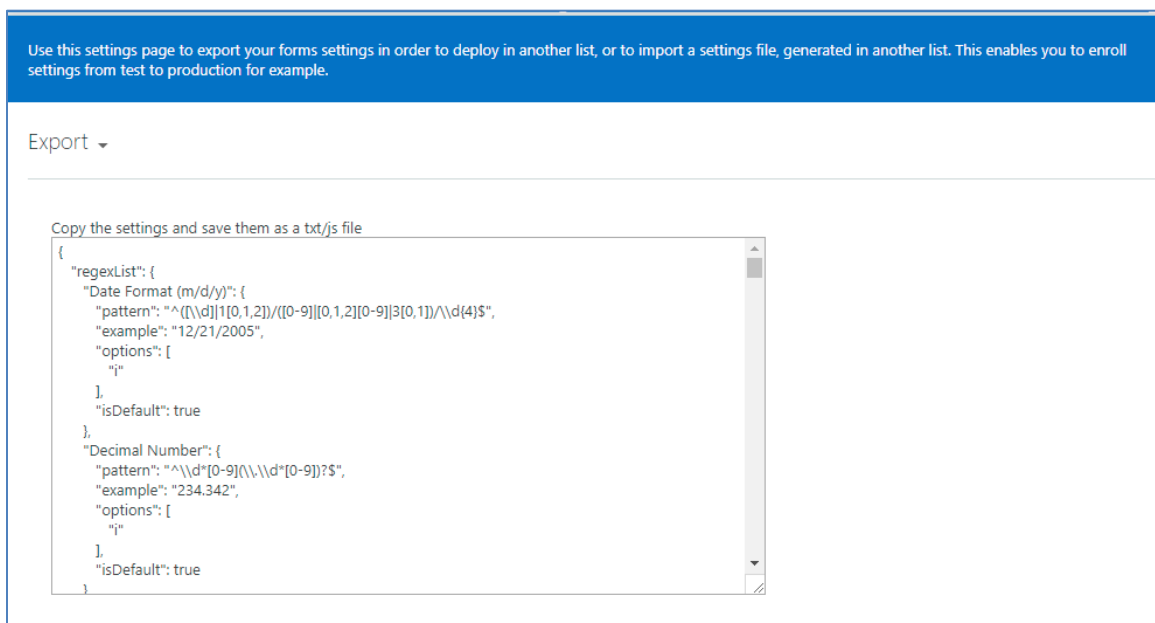
Before we describe how the export/import feature works, it's important to understand where KWizCom Forms settings are saved.

KWizCom Forms settings for each list are saved in the "Site Assets" library, under the "KWizCom/ APLFE" sub-folder, in a .json file.

This means that export/import actions are quite simple: it's all about moving the relevant .json file from one site to another, and connecting it to the relevant target list.

### Export list's forms settings

When you click the "Export/Import Settings" option in KWizCom Forms settings page, you will see 1<sup>st</sup> the .json file content in a multiline text area:



Use this settings page to export your forms settings in order to deploy in another list, or to import a settings file, generated in another list. This enables you to enroll settings from test to production for example.

Export ▾

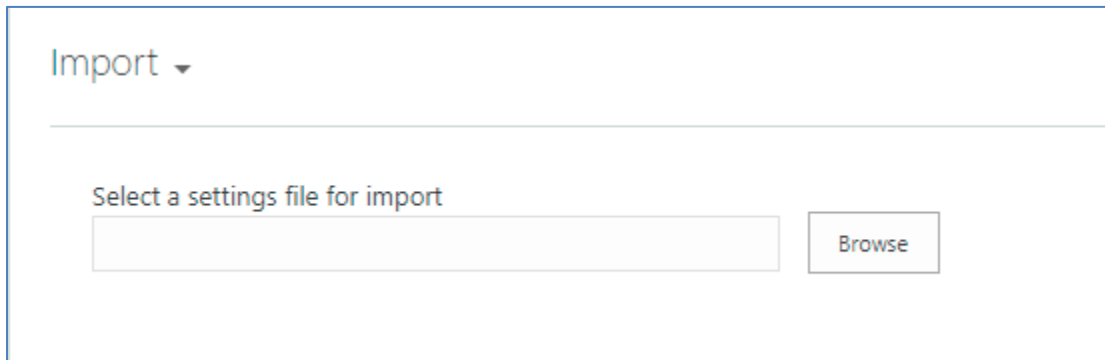
Copy the settings and save them as a txt/js file

```
{
  "regexList": {
    "Date Format (m/d/y)": {
      "pattern": "^((\\d){1[0,1,2]}|([0-9])|([0,1,2][0-9])|3[0,1])\\d{4}$",
      "example": "12/21/2005",
      "options": [
        "i"
      ],
      "isDefault": true
    },
    "Decimal Number": {
      "pattern": "^\\d*[0-9](\\d*[0-9])?$",
      "example": "234.342",
      "options": [
        "i"
      ],
      "isDefault": true
    }
  }
}
```

Now all you have to do is copy the .json file content from the multi-line textbox and paste it into a text file and save it locally.

### **Import list's forms settings**

Assuming you have exported a list's forms settings, to import it to a target list, simply go to your target list's "Export/Import Settings" page, and there click "Browse" under the "Import" section:



The screenshot shows a user interface for importing settings. At the top, there is a tab labeled "Import" with a downward arrow. Below this, there is a horizontal line. Underneath the line, the text "Select a settings file for import" is displayed. To the left of this text is an empty text input field. To the right of the input field is a button labeled "Browse".

Select your exported .json file and that's it, all settings will be applied to your current target list.

**IMPORTANT:** you need to make sure you import the forms settings into a list that is the same list as the source list where you exported the settings from.