List In-Line Editor

User Guide
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INTRODUCTION

GENERAL

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

- Introduction
- Installation Guide
- Administrator Guide
- User Guide
- FAQ
PRODUCT OVERVIEW

Need to bulk-update SharePoint lists and having issues with the Datasheet View?

Cannot use the Datasheet view because your list includes custom columns?

Cannot use the Datasheet view because you are not using Microsoft Internet Explorer?

**KWizCom’s List in-line editor is the solution for you!**

**KWizCom’s List in-line editor** allows users to easily update fields while viewing a list view, without having to edit the entire list item.

Moreover, the List in-line editor overcomes major issues users encounter while trying to work with SharePoint out-of-the-box Datasheet view:

- **You can use any browser!**
  Unlike the Datasheet view, which uses Microsoft’s proprietary ActiveX technology, the In-line editor uses standard JavaScript which works in all browsers.

- **You can edit custom columns!**
  Unlike the Datasheet view that displays custom fields as read-only cells, the In-line editor enables you edit custom fields just like any other SharePoint fields!
Now you can quickly & easily update selected fields, bulk-edit multiple items and add new items by copy & paste from excel – by using any browser, and with your custom fields!

WHY DID WE BUILD IT?

SharePoint content editors and contributors often require a way to bulk-add/update SharePoint list items. SharePoint does provide a solution in the form of the Datasheet view, but this solution does not work for users that work with other browsers than Microsoft Internet Explorer, and does not support custom columns.

The purpose of the KWizCom In-line editor is to overcome those limitations, and provide all users with a quick & easy way to bulk-update list items, by using any type of browser!

KEY FEATURES

<table>
<thead>
<tr>
<th></th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Cross-browser</td>
<td>✓</td>
<td>Works in Internet Explorer only</td>
</tr>
<tr>
<td>Allow editing of custom columns</td>
<td>✓</td>
<td>Read-only</td>
</tr>
<tr>
<td>Quick navigation between cells using keyboard only</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Bulk edit of a column in multiple items</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Bulk-add items by copy &amp; paste from MS Excel</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Web technology</td>
<td>Standard JavaScript</td>
<td>Proprietary Microsoft ActiveX</td>
</tr>
</tbody>
</table>
INSTALLATION GUIDE

SOFTWARE REQUIREMENTS

SERVER REQUIREMENTS
- SharePoint 2007 / WSS 3.0 or
- SharePoint Server/Foundation 2010/2013

CLIENT REQUIREMENTS
- Windows 7/8 or MAC OSX v10.9
- Microsoft Internet Explorer 9+, Mozilla Firefox (Latest version), Google Chrome (Latest version), Safari (Latest version).

INSTALLATION PROCEDURE

SHAREPOINT 2007

1. Log in as SharePoint administrator account to your SharePoint front-end server.
2. Download the product’s latest evaluation version from KWizCom’s internet web site. This evaluation version is fully functional for 30 days. Further details about product activation can be found in the Administrator guide (next section).
3. Unzip the product’s zip file on your SharePoint server.
4. Double-click the .msi file in order to begin the web installation.
5. When the installation process is complete it will recycle all application pools automatically.

SHAREPOINT 2010/2013

1. Log in as SharePoint administrator account to your SharePoint front-end server.
2. Browse the product’s page on KWizCom’s website and click the “Go” link under the “Install using our Web Installer” section.
   This will start the KWizCom web installer.
3. **Note**: The KWizCom Web Installer will automatically offer you to upgrade other existing KWizCom products on your farm, in case you have old versions installed. You can check which products you wish to update at this time.
In case you prefer just to download the relevant .wsp packages and manually deploy them, then in the web installer UI check the “Download only” option (3rd page in the installer’s wizard). When the installer finishes you will be able to go to the installer’s folder on your server, and install the KWizCom packages by simply running the “SP-WSPInstaller” powershell script.

4. At the end of the installation process, you should see all packages deployed in the Central Admin >System settings>Manage Farm Solutions page, and the KWizCom SharePoint Foundation package should be deployed also in the Central Admin’s web application.
POST INSTALLATION

1. Make sure the “KWizCom SharePoint List Inline Editor” farm feature is active (by default it should be active).
2. If you wish to limit the in-line editing functionality to specific site collections, deactivate the “KWizCom SharePoint List Inline Editor” farm feature, and activate the “KWizCom SharePoint List Inline Editor” site collection feature in site collections where you want the in-line editing functionality to be available.

UN-INSTALLATION PROCEDURE

SHAREPOINT 2007

1. Log in as local admin to your SharePoint front-end server.
2. Go to Control Panel and double-click Add or Remove Programs.
3. Select KWizCom SharePoint File Upload filed type entry and click Remove button.
4. Click Yes to approve the removal of the component.
5. Once the product was un-installed, close the Add or Remove Programs screen.

SHAREPOINT 2010/2013

1. Retract the solution using SharePoint central admin or by using stsadm/powershell command line.
ADMINISTRATION GUIDE

This section describes all administration activities including: product localization, product configuration and customization.

PRODUCT ACTIVATION

KWizCom products are available for evaluation prior to purchase. This way you can try our components and verify that they indeed meet your needs. Each evaluation version contains all features of the component’s production version. The only difference between the versions is that the evaluation version is time-limited and will operate for a period of one month.

Once you decide to purchase a KWizCom component you will need to order and then to activate the product. The steps that need to be taken next are listed below.

SHAREPOINT 2007

1. Order the product on the KWizCom website – www.KWizCom.com, or contact our sales team at sales@kwizcom.com.

2. After the order was made, activate your installed evaluation version through the Product Activation Request page on KWizCom’s web site: http://www.kwizcom.com/ProductReg. You will have to copy your Product Code (you will see the product code on the "About" product page):

   ![Product Code](image)
3. Get the component activation key – this key will be sent to you by email once your order is processed.

4. Activate your installed evaluation version -
   click Start -> All Programs -> KWizCom -> KWizCom List in-line editor -> Activate KWizCom List in-line editor.

SHAREPOINT 2010/2013

1. Order the product on the KWizCom website – www.KWizCom.com, or contact our sales team at sales@kwizcom.com.

2. After the order was made, you can activate your installed evaluation version. Activation is done by the following steps:
   a. Open SharePoint Central Admin. On the main “Central Administration” page, you will see the “KWizCom Features Administration” icon:
b. Click the “KWizCom Products License Management”. You will be redirected to a page that allows you to manage all your installed KWizCom products:

<table>
<thead>
<tr>
<th>Installed Products</th>
<th>Additional options</th>
</tr>
</thead>
<tbody>
<tr>
<td>KWizCom Foundation Version: 13.0.70</td>
<td>Activate multiple products</td>
</tr>
<tr>
<td>KWizCom SharePoint List Inline Editor Version: 11.1.59</td>
<td>This option allows selecting multiple products and activate them with a single activation key.</td>
</tr>
<tr>
<td>License: Not licensed.</td>
<td>Manage enterprise license</td>
</tr>
<tr>
<td>Status: The program is not currently activated. Please click manage license to start your evaluation or to enter your product license.</td>
<td>Use this management page if you have purchased the KWizCom Enterprise license, which includes all KWizCom products.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: KWizCom SharePoint List Inline Editor Version: 11.1.59</td>
</tr>
<tr>
<td>Farm License</td>
</tr>
<tr>
<td>Farm license applies to all site collections in your farm.</td>
</tr>
<tr>
<td>Product Code: Not requested Request product code and start your evaluation license now!</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: KWizCom SharePoint List Inline Editor Version: 11.1.59</td>
</tr>
<tr>
<td>Farm License</td>
</tr>
<tr>
<td>Farm license applies to all site collections in your farm.</td>
</tr>
<tr>
<td>Product Code: 5EBVNH0[OTS0U3UV1VJVM780T0X5M858QAMV10AMM-MM3QBTQM]VQEQQO Copy to clipboard</td>
</tr>
<tr>
<td>Activation Code:</td>
</tr>
<tr>
<td>License Notifications: Optionally, enter your email address to get notified when your license is exceeded or about to expire. To enter more than one mail separate them by ; or,. Emails are sent every Monday 6:00 AM.</td>
</tr>
<tr>
<td>License type: Farm license, evaluation period.</td>
</tr>
<tr>
<td>License status: Evaluation period expires at Friday, February 28, 2014</td>
</tr>
</tbody>
</table>

c. Click the “Manage License” link next to the product that you wish to activate. You will be redirected to that product’s license management page:

d. Click on the “Request product code and start your evaluation license now!” link

A Farm product code will be generated and displayed as in the following screenshot:
e. Copy the product code.


Copy your Product Code into the “Product Code” field, and after you fill-out all other form fields, click “Send Activation Request button.

g. Once your order is confirmed, you will receive the Activation Code for your product by email.

h. Copy the activation code into the “Activation Code” field in the product’s license management page and click “Activate now!” link.

That’s it! Your product is now fully activated
USER GUIDE

GENERAL

With the List in-line editor you can edit specific fields, bulk edit multiple fields or copy & paste multiple rows from MS Excel, directly from the list view. Unlike the out-of-the-box Datasheet view, the List in-line editor works in all browsers, and also supports custom columns.

SWITCHING TO IN-LINE EDIT MODE

To start in-line editing a list view:

- Press F2
- Click the “In-line edit” ribbon button (SP2010/SP2013) or Actions menu (SP2007):
IN-LINE EDITING: HOW DOES IT WORK?

Once you switch the list view to in-line edit mode, you will see the following changes:

The **Legend bar** appears above the list view and displays explanations for all types of icons that you may see on the screen, plus some additional options.

You can also see that for every field there are 2 icons: ![icon](image).

**So how does this work?**

1st thing to do is click the ![icon](image) icon on the Legend bar. This will open a help window with detailed guidelines.

**To edit a field**

Click the field’s Edit icon ![icon](image), and the field will show its edit format:
Once you finished editing the field click the “Save” link, or press the keyboard’s “Enter” key.

**To edit a field in multiple items**

1st you have to select the fields that you want to bulk-edit. To add a field to the selected fields for editing, click the + icon.

Once you click it, the field becomes selected and appears surrounded with a blue dashed border:
This way, you can select a field in multiple rows:

Now, edit one of those selected fields (at this point you will see all the rows you're editing marked orange) and save – this will update all the selected fields in one shot!
“Datasheet user experience” – working with the keyboard

All editing functions described above can be done just by using the keyboard, to enable you a faster way, and very similar to the Datasheet view, way of work.

- To navigate between fields, use the keyboard arrow keys.
- To start editing a field – press Enter
- To select a range of fields (same column) – press SHIFT and use arrow keys to navigate between fields
- To add specific fields to selection – use CTRL and navigate to required fields
- To save edited field/s – Press Enter
- To stop editing a field without saving – press ESC

REMARK:

There are some fields/custom fields that have more than a single control and may be capturing the Enter key. In that case clicking ENTER while editing a field may not trigger the save operation, and you may have to press TAB to move the focus away from the control.
BULK-ADD ITEM BY COPY & PASTE FROM MS EXCEL

You can create multiple list items by copying data rows from MS Excel.

This is done according to the following steps:

1. Mark the data rows in MS Excel and copy (CTRL-C):

2. Click to set the focus in the “Paste here” textbox in the Legend bar:
3. Paste (CTRL-V) in the textbox.
   A popup window will appear, showing the pasted items:
4. In the popup window, select the target columns in the drop-down controls (in the screenshot above, the target list columns for the paste operation are **Title** and **Due Date**).

5. Click “Paste to list” link to import those data rows into new list items.
   At the end of the paste operation, new list items are created.
   In case there’s an error, the popup window will display an error message.

**REMARK:**

When pasting items into lookup fields, a specific format that includes the looked up item’s ID and value is needed: `<item ID>;<item value>`.

For example: The lookup field gets information from tasks list by task title. The looked up item title is “Task-6” and its ID is 8, the pasted input should be: `8;#Task-6`
## FAQ

**WHAT IS THE “KWIZCOM LIST IN-LINE EDITOR”?**

This solution enables users who cannot use the SharePoint Datasheet view, to easily update items, including bulk updates that so far you could do only with the Datasheet view. The List in-line editor works with all browsers and also enables updating custom columns (unlike the Datasheet view which does not support updating custom columns).

**WHICH SHAREPOINT EDITIONS ARE SUPPORTED BY THIS PRODUCT?**


**CAN I USE THE PRODUCT WITH BROWSERS OTHER THAN MICROSOFT INTERNET EXPLORER?**

Yes!

You can use the product with additional browsers such as Firefox and Google Chrome.