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Introduction

**KWizCom Forms** wipes out the limitations of SharePoint list forms, adding exciting new features with advanced capabilities. KWizCom has turned SharePoint List Forms into powerful application forms, customizable to suite your needs!

This document provides all the information needed to install, evaluate and deploy KWizCom's SharePoint List Forms Extension Feature:

- Product Overview
- Installation Guide
- Component Activation
- Administrator Guide
- FAQ
Overview

Wipe out SharePoint List forms limitations,
Real sophisticated Forms - in SharePoint!

KWizCom Forms is a SharePoint add-on that turns your existing SharePoint list forms into rich, enhanced web & mobile forms.

KWizCom Forms includes the following web form features:

- Column level permissions
- Column level constraints
- Default values
- Form Layout
- View level permissions
- Navigation
Dynamic Column-Level Permissions

Now you can configure the visibility of specific list form fields depending on the current user and on dynamic field rules. We added a new "Column-Level Permissions" management page to every list. This enables the list owner to set up logic rules that make fields visible, hidden or disabled according to various conditions:

After the fields' permissions settings are saved, the form starts to behave in a dynamic way. In the screenshot above the "Hardware type" field was configured to become hidden for all users in the new/edit/view item form, if "Category" field is not equal to "Hardware".
Here’s the result, looking at the New Item form when user selects the “Hardware” category:

When the user selects any other category which is not “Hardware”, the “Hardware type” is no longer visible:
Column-Level Constraints

Easily configure Column-validation rules to enforce input patterns according to required form logic: Email, field length, ID, equals etc. These field validation rules are validated when user saves the New/Edit form.

In the following example:

We configured a rule that validates that “Issue closing date” field is not empty. This rule is checked only if “Issue status” field equals “Closed”. 
Dynamic Default Values

The Dynamic default values settings page allows you to configure default values for various field types (including those not supported by SharePoint OOTB, such as “Person” and “Lookup” columns). You can also configure different default values for different users/groups.

Dynamic default values feature also enables you to reload field’s default value when user changes other fields’ values in the form. This feature is often used when you need to display default values retrieved from external sources (such as SQL Server, ORACLE etc.), that also depend on user selections in the form.
Form Layout

Ever tried to create a SharePoint list with 20 fields/columns? You end up with an endless form with what could be called a large pile of fields, lacking any logical grouping/categorization. **No More!**

KWizCom Forms enables division of list fields into logical groups/sections displayed in different tabs, apply various themes and have exact control over field position and sizes.
View Level Permissions

Yes... you can also define list views access permissions:

We have defined that all users but one cannot see the "Active Tasks" view.

Configure the various messages presented to an unauthorized user trying to access a view.

In SharePoint, "Active Tasks" doesn't show in the list "Views" drop-down.
A configurable error page displayed to unauthorized users trying to directly browse the view page.
Navigation

Now you can also easily browse through list items by allowing the display of the navigation links on the ‘view item’ form:

Select the view that will be used to display items for users that did not start the browsing from a specific view of the list.
## Key Features & Benefits

<table>
<thead>
<tr>
<th>Feature</th>
<th>KWizCom Forms Pro. edition</th>
<th>KWizCom Forms Pro+ edition</th>
<th>KWizCom Forms Ent. edition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display/hide fields from list forms (New/Edit/View item) and list views to specific users or SharePoint groups.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Display/hide fields from list forms according to a dynamic criteria based on list fields’ values (the item’s status)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Support [Me] and [Today] SharePoint tokens in Column-based criteria for hiding/disabling fields</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enable defining default values for all types of fields (Including Person and Lookup types)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enable defining Dynamic default values: Different default depending on the current user and other fields’ default values.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enable defining field validation rules (constraints).</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enable defining field validation rules (constraints) including custom regular expressions.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enable defining field validation rules, depending on other field values (dynamic rules).</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enable defining custom field default values, depending on the current user.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Connect the form to external data</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enable dividing list form’s fields into several pages (tabs).</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Support list view permissions.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Server-side event handler that prevents the updating of defined document properties using webDav (thus bypassing the SharePoint web interface)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Support client-side events.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>True client-side logic (dependency between form fields) can be deployed with no postbacks!</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Support navigation between list items, in Edit and View modes</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Allow attaching multiple files in one-shot.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Feature</td>
<td>Available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>-----------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&quot;File upload&quot; form field</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ability to limit uploaded files (amount, size, format)</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cascaded look fields in your forms (Region &gt; Country &gt; City)</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multi-row forms</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Custom ribbon menus</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile forms and custom mobile pages</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compliant with the web accessibility standard (WCAG)</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multilingual (standard for all KWizCom components)</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cross-browser compatible (IE, Firefox &amp; Google Chrome)</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Installation

Software prerequisites

Server Requirements

1. SharePoint Server 2013-2019

Client PC Requirements

1. Microsoft Windows Windows 10+
2. Firefox/Chrome/Safari/Edge – All latest versions

Installation Procedure

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.

   **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.

3. 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. After you have successfully deployed the required .WSP packages, a new feature is added both to the farm level and to site collection level. By default the Farm level feature should be active, enabling you to start using this feature immediately:

2. If you had a previous version installed, and have been deploying the List Forms Extensions Feature is site collection level, you will need to deactivate the farm level feature (because it is automatically activated during installation). If you leave both the farm-level and the site collection-level features active, you will have duplicated links to the List Forms Extensions settings pages at the list settings pages.
Uninstallation procedure

1. Retract and delete the solution using SharePoint central admin or by using stsadm/powershell command line.
Component Activation

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

Once you decide to order a KWizCom component, you will need to follow the following steps:

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:

   ![Diagram showing Central Administration with KWizCom Features Administration icon highlighted]

   b. Click the KWizCom Features Administration icon. You will be redirected to a page that allows you to manage all your installed KWizCom products’ licenses.
After installing KWizCom Forms Standard Edition, you should see the “List Forms Extensions Feature” plus all its sub features, all appear as separate products:

- SharePoint List Forms Extensions – Default Field Values
- SharePoint List Forms Extensions – View Permissions
- SharePoint List Forms Extensions – Field Permissions
- SharePoint List Forms Extensions – Field Constraints
- SharePoint List Forms Extensions – Form Layout
- SharePoint List Forms Extensions – Item Navigation

You can order and activate the entire KWizCom Forms suite by activating the “List Forms Extensions Feature”, or you can order and activate selected features.

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 now” link, under the required license type. A product code will be generated and displayed as in the following screenshot:

![Product Code Screenshot]

- **Name:** SharePoint File Controller Feature
- **Version:** 11.0.0

Farm License

- Farm license applies to all site collections in your farm.
- **Product Code:** 7B23C4F5-24B4-4A0A-82B0-A7FB52D7E465

License Notifications:

- Optionally enter your email address to get notified when your license is exceeded or about to expire. To enter more than one email address, separate email addresses with a comma.
- **Expiration:** Thursday, November 18, 2010

Web Application License

- **Product Code:** Not requested

Site Collection License

- **Product Code:** Not requested

e. Copy the product code.

f. Browse the **Product Activation Request page** on KWizCom’s website: [http://www.kwizcom.com/ProductReg](http://www.kwizcom.com/ProductReg).
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.
Administration Guide

Introduction

This section describes the KWizCom Forms configuration pages that enable you to enhance the SharePoint list forms with advanced web form features.

To configure a required list’s forms, go to list settings page and click the “KWizCom forms settings” link:

You can also get to the KWizCom Forms settings page by clicking the “List” tab and then click the “KWizCom Forms Settings” button located at the “Settings” ribbon group:
This will open the KWizCom Forms configuration interface which includes the following configuration pages:

- Column-level permission
- Column-level constraints
- Dynamic Default values
- Form Layout
- View-level permissions
- Navigation
Column-Level Permissions

Use this page to configure Column-level permissions rules.

Each rule includes the following definitions:

- Fields/fields to show/hide/disable
- In which list forms to apply the rule (New, Edit. View)
- To which users/group* to apply the rule
- Dynamic conditions – set of Column-conditions that only if they become valid then the rule is enforced.

After you define a rule, you add it to the current list’s rules. All the rules are processed in run-time one after another.

* IMPORTANT COMMENT

When the new/edit/view item form is loaded, all these Column-permission rules are processed. In order to enhance performance, KWizCom Forms caches user-group membership information for a period of 5 minutes; this way there no need to query AD tens or hundreds of times for each form load, which could impact load time of the form.

This means that if a user was taken off a group, only 5 minutes later it will be applied in KWizCom Forms.

Example:
You can set up a rule that enables only a user to whom the current task is assigned, to be able to see and update the “Status” field.
The Column-Level Permissions settings page includes the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field</td>
<td>Pick a field or several fields (by holding down the CTRL key) that you wish to define permissions for.</td>
</tr>
<tr>
<td>Permission type</td>
<td>Choose the permission type you want to define for the selected field:</td>
</tr>
<tr>
<td></td>
<td>• Show – show that field</td>
</tr>
<tr>
<td></td>
<td>• Hide – the field will not be displayed</td>
</tr>
</tbody>
</table>
• Disable – the field will be visible but inactive (read only).

| Allow updates to hidden/disabled fields | When a rule hides or disables a field to a user, this means that this user is not able to update the field even if he tries to do it not through the SharePoint interface. Any process that runs using that user’s account will fail to update the field. For example: if a user triggers a workflow, this workflow will fail updating this field. If you wish to hide/disable a field from a user, but to enable other processes that run under the same user credentials (such as workflows) to update the field, check the “Allow updates to hidden/disabled fields” checkbox. |
| Users/Group | Enter user/SharePoint group names for which you wish to set the permission rule. |
| Apply permissions to the following page types | Select the list item form (New/Edit/View) where the defined field level permissions should be applied. You can also check the "List views” checkbox in case you want to show/hide a column in all list views. If you have a rule that disables a field, it doesn't apply to list views of course. |
| Conditions | Define property-based criteria for the selected permission rule. After you define a criteria, click the “Add” button: |

<p>| Conditions: | Value |</p>
<table>
<thead>
<tr>
<th>Column</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created</td>
<td>&lt;</td>
<td>Today</td>
</tr>
</tbody>
</table>

You can use "Today" or "[Today] + [Value]" with calculations.
To set for next week use: [Today] + 7.
To set to 30 minutes from now use: [Now] + 30.
External value |

| Add/Update Column-level permission rule | In order to add a rule, click the 'Add field permission rule" button. This will add the rule to the "Current list rules" grid at the bottom of the page. |
| Support client side validation | Normally all field permission rules are processed when the form loads. Check this checkbox if you have rules that should be processed as a result of user action in the browser as well, this makes the form dynamic: field are hidden/displayed when the user selects a value in other fields. |

After you have configured all the controls described above, click the "OK" button to apply this configuration.
Column-Level Permissions Example

In the following screenshot, we have 2 Column-level permission rules:

<table>
<thead>
<tr>
<th>Rule no. 1</th>
<th>Rule no. 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not show the “Resolution” field to anyone, in all list forms (New, Edit, View forms).</td>
<td>Show the “Resolution” field to everyone ONLY if the “Approved” field equals “True”.</td>
</tr>
</tbody>
</table>

Because rules are processed according to their order, the run-time behavior will be as follows:

When a user opens the 'New item' form, he will not see the “Resolution” field:

![New Item Form](image)

Now, if the user checks the "Approved" checkbox, the rules are re-processed and due to rule no. 2, the “Resolution” becomes visible:
So, as you can see, you can create dynamic forms in which fields dynamically appear/become hidden as a result of other fields’ values and user sections.
Column-Level Constraints

Use this page to configure Column-level validation rules.
These rules are processed when a user submits a list form, and once a field validation rule fails, the user will get the appropriate error message.
The validation rules are processed only for fields that appear (visible) in a form, so if for example a field is hidden (due to usage of Column-level permissions) – it will not be validated.
You can also define dynamic rules – rules that are conditioned upon some other fields’ values.

Each validation (constraint) rule includes the following definitions:
- The field you wish to validate
- Constraint definition
- The error message that is displayed if the validation fails
- To which users/group to apply the rule
- Dynamic conditions – set of Column-conditions that only if they become valid then the rule is enforced.

Field validation rule example:
- “Due Date” field value is greater than “Start Date” field value.
- “Description” field is not empty if “Status” field equals “Completed”
The Column-Level Constraints settings page includes the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Validate field</td>
<td>Pick a field that you wish to define a constraint for.</td>
</tr>
<tr>
<td>Matches this criteria</td>
<td>Define a field validation rule, using the available rules and operators.</td>
</tr>
<tr>
<td>Conditions</td>
<td>Define property-based criteria for the selected field constraints. You can add several conditions to a rule. The rule will then be processed only if those conditions become valid.</td>
</tr>
<tr>
<td>Add Column-level validation rule</td>
<td>In order to add a rule, click the 'Add field validation rule&quot; button. This will add the rule to the &quot;Current list rules&quot; grid at the bottom of the page.</td>
</tr>
</tbody>
</table>

After you have defined all the controls described above, click the "OK" button to apply the configuration you defined.
Column-Level Constraints Example

In the following screenshot, we have 2 Column-level constraints rules:

<table>
<thead>
<tr>
<th>Priority</th>
<th>Field</th>
<th>Rule</th>
<th>Operator</th>
<th>Value</th>
<th>Error Message</th>
<th>Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Resolution</td>
<td>String Length</td>
<td>Greater than</td>
<td>0</td>
<td>string cannot be empty</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Due Date</td>
<td>Value</td>
<td>Greater than</td>
<td>[Start Date]</td>
<td>Due date must be later than the task’s starting date</td>
<td></td>
</tr>
</tbody>
</table>

Rule no. 1 says: “Resolution” field’s string length must be greater than zero (which means: this field must not be empty).

Rule no. 2 says: “Due Date” field’s value must be greater than “Start Date” field’s value.

In run-time, if a user tries to save the following task (where the Due Date < Start Date), he will get the following validation error:

We did not get any validation error for rule no, 1 because the “Resolution” field does not appear in the form (it is hidden because of Column-level permissions).

Configuring custom patterns
When you select the "Custom Pattern" validation rule you can to set up a custom regular expression*. A regular expression is a special text string for
describing a string pattern. It enables you to define the exact pattern you wish
to validate. For more information about the regular expressions syntax, please
browse:

http://www.regular-expressions.info/index.html
Dynamic Default Values

Use this page to configure dynamic default values rules.

There are several key differences between SharePoint’s default values, and the ones that are defined using KWizCom List Forms Extensions feature:

- You cannot configure SharePoint default values for Person and Lookup fields.
- SharePoint does not enable configuring different default values for different users, and default values which depends on values of other fields.
- The default values that are configured by using KWizCom Forms, are processed in run-time after the SharePoint’s default value are processed.
- KWizCom Forms enables configuring default values that are retrieved from external sources by using external values.
- KWizCom Forms enables configuring default values that will be reloaded also upon selecting values in other fields in the form.

**Dynamic Field default values rules examples:**

- “Start Date” equals [Today]
- “Assigned to” Equals [Me]
- “Due Date” equals “Start Date”+3
Default values settings page

Field:

- AssignedTo

Users/Groups:

Enter user names and SharePoint groups you wish to apply this rule for.
Leave this field empty to create a rule for all users.

Default value when a new item is created:

- [Me]

You can use [Me] or [Today] / [Now] with calculations.
To set to next week use [Today] + 7.
To set to 30 minutes from now use: [Now] + 30.

- external value

You can also use any other field from the current item using [field name].

Reload value

Add Default Value Rule

Current default value rules:

Rules are evaluated according to their priority.
Higher priority rules will overwrite previous rules.
To change a rule priority simply type the new priority in the table above.

The Default Values settings page includes the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field</td>
<td>Pick a field that you wish to configure default value for.</td>
</tr>
<tr>
<td>Users/Groups</td>
<td>Enter user/SharePoint group names.</td>
</tr>
<tr>
<td>Default value when a new item is created</td>
<td>Configure the default value for the field.</td>
</tr>
<tr>
<td></td>
<td>You can type a manual value or select an external value.</td>
</tr>
<tr>
<td></td>
<td>When typing a manual value, you can use dynamic tokens such as [Today], [Me] and other field names, such as [Due Date].</td>
</tr>
<tr>
<td></td>
<td>For a Date field, if configured to show date and time, you can also use the [Now] token which returns the current date and time.</td>
</tr>
<tr>
<td></td>
<td><strong>IMPORTANT</strong>: field names are case sensitive.</td>
</tr>
</tbody>
</table>
Reload value | This section includes the following properties enabling you to configure reload behavior of the default value:
---|---
Reload value when user changes other fields' values | If a field’s default value depends on other fields' values, it will be reloaded when user changes values of these fields.
Reload value when user clicks a link | Check this property if you want the default value to be reloaded when user clicks a link. When you check the property, you’ll be asked to configure that link’s caption and location in the form.
Display "Reload" icon next to the field | Check this if you wish to display a Reload icon next to the field, which enables users to reload the default value. This is relevant when the default value is taken from external sources (by using external values), and the value of that external source might have changed.
Display field as R/O | Check this property to have the field rendered as read-only. This does not change the field permissions, it just renders it as a label. This behavior is wanted when a field is used to display a value retrieved from an external source, so it’s just for viewing and not for update.
Add default value rule | In order to add a rule, click the 'Add default value rule" button. This will add the rule to the "Current default value rules" grid at the bottom of the page.

After you have defined all the controls described above, click the "OK" button to apply this configuration.

**Default Value Examples**

In the following screenshot, we have 2 default values rules:

![Current default value rules](image)

**Rule no. 1** says: “Start Date” field’s default value equals today’s date.

**Rule no. 2** says: “Due Date” field’s default value equals “Start Date” + 3 days.

**Rule no. 3** says: “Assigned to” field’s default value equals the current user.

Adding a new task item, displays the following default values:
### Task Details

**Status:** Not Started

**% Complete:**

**Assigned To:** System Account

**Description:**

**Start Date:** 12/15/2010

**Due Date:** 12/18/2010

**Approved:**

[Save] [Cancel]
Form Layout

Use this page to customize your list form’s layout to make it easier to fill-out:

- Create multi-column forms with custom field locations
- Group related fields and display them in a multi-tabbed form
- Group related fields into Accordion-style frames
- Customize the form’s style with themes and your own custom CSS

Form Layout settings page
The Form Layout settings page includes the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content type</td>
<td>This drop-down displays the content types that are inherited by the current list. When you define a Column-group, you can associate it with a content type, or create it under the “All” option. If you associate the Column-group with a specific content type, it means that this field group will be visible only for list items that belong to this content type. If you do not associate the field group with any content type (create it under the “All” option), then this field group will be visible for all content types. What happens if you define several field groups, some under the “All” option, and some others under some content type? The answer is: For an item which belongs to that content type, you will only see the Column-groups that were associated with that content type, and you will not see the ones defined for “All” (the content types groups override the generic ones).</td>
</tr>
<tr>
<td>Field caption location</td>
<td>By default field captions in SharePoint list forms appear let to their fields. Using this property, you can change that and have each field’s caption appear above its field.</td>
</tr>
<tr>
<td>Column description location</td>
<td>Choose where to display the column description: - Below the field (like SharePoint does) OR - Clicking an info icon, description will be displayed in a tooltip.</td>
</tr>
<tr>
<td>Default # fields in a row</td>
<td>By default SharePoint list forms display 1 field in each row. Using this property you can create multi-column forms and have multiple fields in a row.</td>
</tr>
<tr>
<td>Custom CSS path</td>
<td>If you wish to override the list forms styles with your own custom styles, enter the URL of your custom CSS file. For more guidelines click the “Sample CSS file” link, next to the property.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Show “Apply” button in</td>
<td>You can optionally display the “Apply” button in the New Item and the Edit Item forms. Clicking the “Apply” button will save the form and keep the user in the form to continue editing it.</td>
</tr>
<tr>
<td>Show groups as</td>
<td>Select the way these fields group will be displayed to the users: Tab - each field group will be displayed as a tab (separate page)</td>
</tr>
<tr>
<td></td>
<td>Accordion - each field group will be displayed as a collapsible frame, all in the same page.</td>
</tr>
<tr>
<td>Theme</td>
<td>Select a theme to be applied on the current list forms.</td>
</tr>
<tr>
<td>Hide group if all fields are invisible to a user</td>
<td>Check this checkbox to hide a field groups from a user that has no permissions to see the fields that are included in that field group.</td>
</tr>
<tr>
<td></td>
<td>Leaving this checkbox unchecked will display an empty group (with no fields) to a user that doesn't have any permissions to see the included fields.</td>
</tr>
<tr>
<td>Add “All fields” group</td>
<td>Check this checkbox to display an additional field group (tab) that includes all list fields.</td>
</tr>
</tbody>
</table>

2. Column grouping and group settings
   Use this section to create field groups.

| Groups                                    | List of existing field groups associated with the selected content type.                                                                     |
|                                          | You can delete a field group and reorder the existing field groups.                                                                             |
|                                          | To configure a group, you need to select a group in that list.                                                                               |
| Add                                       | To add a new field group type its name in the textbox and then click the “Add” button.                                                       |
| Group title                               | Use this textbox to rename the selected field group.                                                                                           |
| Group is visible on                       | In case you have KWizCom Forms Enterprise installed (which includes KWizCom Mobile), you can target a selected field group to web, mobile or both. |
| User/Groups                               | Use this field to define which users/groups will be able to see the selected Column-group.                                                   |
| # Columns in a row                        | This property allows you to set the number of columns for the selected group, and override the form's defined |
### Field Description

number of columns. Select "use default" to use the value defined for the entire form.

3. **Group columns & layout**
   Use this grid to create rows in your form and then select in each cell which field you want to be displayed.

4. **Form preview & advanced layout settings**
   Use this section to customize the layout of the selected group. You can configure the exact location and width of each of the fields in the field group.

<table>
<thead>
<tr>
<th>Fields table</th>
<th>Using this grid you can also configure for each field:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Width (in pixels)</td>
</tr>
<tr>
<td></td>
<td>Column span</td>
</tr>
</tbody>
</table>

After you have defined all the properties described above, click the "OK" button to apply this configuration.
View Level Permissions

Use this page to configure view-level permissions, which means: you can define which list views are visible to different groups of users.

View-level permissions settings page

**Configuration**

**View:**
- All Issues
- Support tickets assigned to me
- Active support tickets
- My open support tickets

You may select multiple views by holding down the [Ctrl] key.

**Permission type:**
- Show
- Hide

**Users/Groups:**

Enter user names and SharePoint groups you wish to apply this rule for. Leave this field empty to create a rule for all users.

Add View-Level Permission Rule

**Current list view rules:**

<table>
<thead>
<tr>
<th>Priority</th>
<th>View</th>
<th>Permission type</th>
<th>Users/Groups</th>
<th>Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Active support tickets</td>
<td>Hidden</td>
<td>Everyone</td>
<td>Delete</td>
</tr>
</tbody>
</table>

Rules are evaluated according to their priority. Higher priority rules will override previous rules. To change a rule priority simply type the new priority in the table above.

**Additional settings**

**Redirect page settings:**

- Show access denied page
- View unavailable message: According to current view permissions this view is not available
- All views unavailable message: According to current view permissions no list views are available
- ‘Go to next view’ button caption: Go to next available view
- ‘Return to homepage’ button caption: Return to homepage

When a user tries to open a view he is not permitted to see, he can be redirected to a page with proper messages. The above settings define the text on this page.
The View-level permissions settings page includes the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Select the view/s for which you want to define permissions.</td>
</tr>
<tr>
<td>Permission type</td>
<td>Select the type of permission (hide or show).</td>
</tr>
<tr>
<td>Users/Group</td>
<td>Enter users/groups for which you wish to define the permissions.</td>
</tr>
<tr>
<td>Add View-Level Permissions Rule</td>
<td>In order to add a rule, click the &quot;Add View-Level Permissions Rule&quot; button. This will add the rule to the &quot;Current list view rules&quot; grid at the bottom of the page.</td>
</tr>
<tr>
<td>Redirect page settings</td>
<td>This section enables you to define a custom error page to which users trying to access a view they are not authorized to view, will be redirected.</td>
</tr>
</tbody>
</table>

After you have defined all the controls described above, click the "OK" button to apply this configuration.
Navigation settings page

Use this page to configure navigation options between Edit/view item forms, without having to go through the list view. This saves a lot of time when having to go over many items’ View or Edit item forms.

The Navigation settings page includes the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display ‘Next’ &amp; ‘Previous’ navigation links in ‘View Item’ form</td>
<td>Check this checkbox to allow navigation between View Item forms.</td>
</tr>
<tr>
<td>Display ‘Next’ &amp; ‘Previous’ navigation links in ‘Edit Item’ form</td>
<td>Check this checkbox to allow navigation between Edit Item forms.</td>
</tr>
<tr>
<td>‘Previous’ link caption</td>
<td>Choose a different title for the previous item button.</td>
</tr>
<tr>
<td>‘Next’ link caption</td>
<td>Choose a different title for the next item button.</td>
</tr>
<tr>
<td>Check this if you wish to keep the current tab when you navigate through items</td>
<td>In order to browse a certain tab of the items’ View/Edit forms check this checkbox, Otherwise clicking next or previous will bring you back to the first tab of the next or previous View/Edit form.</td>
</tr>
<tr>
<td>Navigation through view:</td>
<td>This section enables you to define a view using which the items will be displayed in navigation if the user did not start browsing the items from a certain view in the list.</td>
</tr>
</tbody>
</table>

After you have defined all the controls described above, click the "OK" button to apply this configuration.
Example

After configuring navigation for a Tasks list, when editing a task item end-user will see the “Previous” and “Next” links:

By clicking these links, user can quickly navigate to the next item’s Edit form without having to close the current form, go back to the list view and open the next item’s edit form. This way we save 2 page refreshes and several clicks for each form!
Export/Import of form settings

Export/Import function enables you to move your form settings from one environment to another. This way you can create and check your forms in your test environment, and when ready – move these settings to your production environment.

KWizCom forms settings are saved in xml files in the list. Each settings page (Field permissions, Field Constraints etc.) has its own xml file.

In order to export a specific settings page, or to import settings from to a specific settings page, 1st click the “Import & export” collapsible section in the settings page:

To export your existing page settings:
Click the “Export” button and save the produced xml file in your preferred location.

To import settings from KWizCom Forms settings file:
Click the ”Browse...“ button and select the file that you wish to import and then click “import”.

IMPORTANT:
Export & import are per-settings page, so to export/import all your forms settings make sure to repeat the export/import process for each one of the KWizCom Forms setting pages.
External values

With KWizCom Forms, you can connect your forms to external data. KWizCom Forms can retrieve and update external data in any source which is available via web request (http/https).

As the one who creates/configures the forms you can connect your form to external data by:

• Loading external data as field default value
• Using external data in conditions (in all settings pages)
• Updating external data by using custom actions
  (KWizCom Forms Enterprise edition)

The following section provides details about configuring and using external data in your forms.
Terms

External source
any system that is available via web request.

External value
an encapsulation of a specific web request made to some external source. An external value may include dynamic parameters which are sent to the external source, and it returns a value which is returned from the external source.
Using external values as default values

In the Default Values settings page you can enter a value or select an external value for a selected field:

Clicking the “external value” picker icon will open the “Select external value” popup:
In this popup window you will see all the available external values that match your field type.

In the screenshots above we are selecting an external default value for the “Due Date” field, so we are offered only with the external values of type DateTime.

For each external value you can see the following details:

- **Name** – An external value looks like a function, optionally with parameters (in the screenshot above, name is GetDateByID)
- **Return type** – that’s the type of value returned by the external value. You can use only external values that their return type matches the current column type.
- **Description** – description provided by the one who created the external value.
- **Cacheability** – Indicates if the external value is a cached value, and what is the cache period.
After you select an external value by clicking it, it will appear in the “Value” textbox:

As you can see, the external value expects a parameter [ID]. You can replace it with a fixed value such as GetDateByID(5), or you can provide a dynamic token such as [Today], [ListId], [ListTitle], [Me], or any column from your list surrounded by [].

You can also use pre-defined operators which are available for each external value type. To learn about which operators are available for a specific external value, simply click the ? icon next to the external value – you’ll see a popup with detailed description about the available operators:
**Example:**

To add 3 days to the date returned by `GetDateByID([ID])` external value, we can use the following operator: `GetDateByID([ID]).AddDays(3)`

After you’ve selected your external value, click validate to make sure your external value is formatted correctly before you click ok:
After you click OK, you’ll see the selected external value as the default value, all left to do is click the “Add Default Value Rule” to add this default value rule to your form:
Using external values in conditions

In most KWizCom Forms settings pages there’s the “Conditions” section, where you can configure property-based conditions for your rules. When comparing a column value to another value, you can use manual values or external values:

In the following example, we have added a Column-permission rule that hides the “Task Status” field if the “Assigned To” column’s value is not equal to the value returned by the “GetUserByID([ID])” external value:

Selecting an external value for your conditions is done exactly the same as selecting for default value, as described in the previous section.
Creating & managing external values

So far we’ve presented what external values are and how you can use them when configuring your forms. In this section we’ll show you how to create and manage external values that can be used by other users in their forms.

External values are stored in a hidden list in the site collection level. To add/edit external values, click the “Manage external values” link in the left navigation bar:

This will open a new page showing all the existing external values in the current S.C:
**COMMENT:**

This page is accessible only to users who have the permission to access this list. If you want to manage this list’s permissions to enable other users to access this list, click the link at the bottom of this page.

The External value management page displays all available external values, and allows you to edit, delete and add new external values.

To edit an external value click the external value’s link. To add a new external value – click the “add a new external value” button at the top of the page.
**Adding/editing an external value**

Clicking an external value or the “add a new external value” button will open the following form:

---

**KWizCom External Values Management**

Add External Value:
External values can be used anywhere in your site collection.

- **Name**
  - Required information

- **Description**

- **Url (with query string if needed):**
  - Required information

---

Built in services:
- Get value from remote list item by item ID
- Get value from remote list item by specific value
- Get value from SQL database
- Get value from Oracle database
- Get value from excel file

---

Request body/data (optional):

User name (optional):
Type to change

Password (optional):
Type to change

Expected data type returned:
- Text

Cacheability:
- No cache

---

Click here to manage edit permissions on the external values list

---

You need to fill-out the following fields:

- **Name**
  - Specify a clear and descriptive name for this external value.
  - The name must follow function naming convention (letters, numbers and _ only, no spaces or other special characters), example: GetProductFromCRM.
Once you create the external value, its name cannot be changed.

- **Description**
  Enter a description for this external value that will make it easier for other users to understand when and how to use it in their solutions.

- **Url (with query string if needed)**
  Please provide the URL address of the service you wish to get the data from. You can use tokens such as [Today], [ListID], [ListTitle], [Me] or any column from the item surrounded by [] anywhere in the URL or query string.

- **Built in services**
  KWizCom Forms includes 5 services that you can use right out of the box:
  - Get a value from a remote SharePoint list item
  - Get a value from a SQL database
  - Get value from Oracle database
  - Get value from an excel file

Clicking each of these links will populate the URL text area with the selected service’s url:

For a more detailed description and usage examples of these built-in services, see next section.
• **Request body/data**
  optionally, if your request requires a body to be sent - please provide the value for the request body here.
  You can use the same tokens as for URL parameter. Also, if your query string to our built-in services gets too long, you can drop it and place it here instead. Just move everything after the “?” character (without the “?” character) to the request body.

• **User name**
  optionally, if your request does not accept anonymous calls, provide the login information here. Both the user name and password will be encrypted in the database.
  * Some authentication providers are not supported. Contact our support if you are facing an issue with this.

• **Password**
  optionally, if your request does not accept anonymous calls, provide the login information here.
  Both the user name and password will be encrypted in the database.

• **Expected data type returned**
  Please select the data type this external value should return:
  o **Number** expects any valid number
  o **Percent** expects a value between 1-100 and will divide it by 100 before using it
  o **User login or email** will be validated as a SharePoint user for use with user fields
  o **Lookup ID** will expect a number that corresponds with an item ID
  o **Date & Time** - we recommend using ISO 2014 format (yyyy-MM-dd hh:mm:ss)
  o **Boolean** will return false if the value is 0, no or false. For all other values it will return true.
  o For all other uses or purposes - use Text. Using Text on a lookup will try to match an item with that display text.

• **Cacheability**
  this property defines for how long to cache the results of the external value.
  If your data does not change frequently, a higher number will get better performance.
After you have filled-out the form you need to validate your external value (make sure it really works as expected).
Click the “Validate” button:

A validation popup will appear:

You should provide values for your external value’s parameters and click “validate”:
And you will see the returned result from the external value:

Validation result

Service returned value: kwizlab\sales1

After you have validated your external value you can save it, and all users who create forms can use this external value.
External values built-in services
KWizCom Forms includes a set of services that enable you to connect your forms to external sources. This sections provide details on how to use each of these services, to create your external values.

Get value from remote list item
This service provide 2 url’s which enable you to retrieve a requested item’s value from a remote SharePoint list:

Get value from remote list item by item ID
This service returns item field’s value defined by its ID.

URL:
http://{your SharePoint server}/KWizComForms/_layouts/15/
KWizCom.SharePoint.Foundation/ExternalValueSPRemote.ashx?List=[ListName]&Item=[ItemID]&Field=[FieldName]

Parameters:
[ListName] = name of the list
[ItemID] = ID field’s value of the requested item
[FieldName] = name of the field that its value will be returned

Get value from remote list item by specific value
This service returns item field’s value defined by a value of another field.

URL:
http://{Your SharePoint server}/KWizComForms/_layouts/15/
KWizCom.SharePoint.Foundation/ExternalValueSPRemote.ashx?List=[ListName]&FindField=[FindField]&FindValue=[FindValue]&Field=[FieldName]

Parameters:
[ListName] = name of the list
[FindField] = Field name to search
[FindValue] = Value to look for in the search field
[FieldName] = name of the field that its value will be returned
Get value from SQL database
This service provides a URL that enables you to run SQL queries on SQL databases. The queries can be both SELECT, ADD, or UPDATE (or combination), so you can use this service to create external values that retrieve and/or update SQL server database tables.

**URL:**
http://{your SharePoint server}/KWizComForms/_layouts/15/
KWizCom.SharePoint.Foundation/ExternalValueSQL.ashx
?ConnectionName=[connection name]&Command=[command text]&Type=[type]

**Parameters:**
[connection name] = Connection string name.
This connection string encapsulates all connection details to the SQL database which should be stored in your web.config file.
Example of such connection string entry in the web.config file:
<ConnectionStrings>
<add name="crm" ConnectionString="server=sp2013; database=CRM; User id=crmlogin; Password=sun@sh!ne" />
</ConnectionStrings>

This way the connection details are not visible to all users who deal with creating external values.

[command text] = This is the actual SQL sentence which can be a combination of SELECT, ADD, and UPDATE queries.
The command should be

[type] = For future use, should be fixed on "Text", or removed from the url.
Get value from Oracle database

**IMPORTANT:**

Before you can use this service, please make sure your SharePoint farm is properly configured to connect to ORACLE database:

1. Install Oracle client tools 64 bit,
   http://www.oracle.com/technetwork/topics/winx64soft-089540.html
2. Configure Oracle client tools.
3. Add your connection string to the web.config file under the www root folder.

This service provides a URL which enables you to run SQL query on Oracle database.
The query can be both SELECT, ADD or UPDATE (or combination), so you can use this service to create external values that retrieve and/or update Oracle server database table.

**URL:**

http://{your SharePoint server}/KWizComForms/_layouts/15/
KWizCom.SharePoint.Foundation/ExternalValueOracle.ashx?ConnectionName=[connection name]&Command=[command text]&Type=[type]

**Parameters:**

[connection name] = Connection string name.
This connection string encapsulates all connection details to the ORACLE database which should be stored in your web.config file.
Example of such connection string entry in the web.config file:

```xml
<connectionStrings>
  <add name="myoracle" connectionString="Password=sun@sh!ne;User ID=SYSTEM;Data Source=\"(DESCRIPTION = (ADDRESS_LIST = (ADDRESS = (PROTOCOL = TCP)(HOST = Oracle)(PORT = 1521)) ) (CONNECT_DATA = (SERVICE_NAME = Products)))\";Persist Security Info=True" />
</connectionStrings>
```

This way the connection details are not visible to all users who deal with creating external values.

[Command text] = This is the actual SQL sentence which can be a combination of SELECT, ADD and UPDATE queries.
The command should be

[type] = For future use, should be fixed on "Text", or removed from the url.
Get value from Excel file

This service provides a URL which enables you to get a value of a defined cell from an Excel worksheet.

URL:
http://{your SharePoint server}/KWizComForms/_layouts/15/

Parameters:
[excel file url] = Full URL of the Excel file. The file can be located on any accessible web server (doesn’t have to be a SharePoint library).
[worksheet name] = the worksheet where the requested cell is located
[cell] = name of the requested cell

Example:
http://intranet.contoso.com/sales/KWizComForms/_layouts/15/
FAQ

What does the KWizCom Forms do?
KWizCom Forms is a SharePoint add-on that turns your existing SharePoint list forms into rich, enhanced web & mobile forms.

Does it work also with document libraries?
KWizCom Forms includes a server-side event handler that can prevent users from updating fields that are defined as hidden or disabled.

Can I also define permissions on views?
Yes!
You can define access permissions to list/library views.