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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:

- Introduction
- Installation guide
- Administrator guide
- User Guide
- FAQ
- Version release notes
PRODUCT OVERVIEW

KWizCom SharePoint Notification Feature

Be on time – always!

KWizCom SharePoint Notification Feature is a SharePoint feature that allows you to create smart notifications for any SharePoint list/library.

Now you can get Time-based and Rule-based Reminders for upcoming/delayed tasks, project deadlines and milestones, risk mitigations and any other SharePoint item.

The Notification feature consists of three parts:

- The Notification Web Part
- The List notification settings page
- The Notifications action menu

The Notification web part enables users to view and manage their personal notifications:

![My Notifications](image)
The **List notifications settings page** enables list administrator to define notification rules for a list/library:

### Notifications Settings: Customers

**Notification Name**
Provide a descriptive name for the notification.

**Notification Start Date**
Specify the date and time on which the notification manager should start processing this notification.

**Notification Recurrence**
Specify the frequency in which a notification is sent. Not selecting any of the recurrence options will trigger a one-time notification and then the notification rule will become inactive.

**Target Audience**
Specify who should get the defined notification.

**Notification Type**
Specify the way in which users will be notified - email message/web part display.

**Apply notification on the following items**
Specify a property-based criteria which will define the items on which a notification will be activated.

**Conditions**

- **View**
  - All Items
  - Custom Condition

**Users will be notified via**

- Send reminder by Email
- Display in the notifications web part
  
  (Web part notifications only target specific users not groups)

**Define target notification audiences by**

- Users/Groups
- Users/email addresses defined by a field in the current list
- Users/email addresses defined by a field in another list
- Static list of email addresses

---

Add Notification Rule
The **notification action menus** enable users to define personal notifications on requested list items:

---

**THE BUSINESS NEED**

Time-based and rule-based notifications are needed in many business processes, such as:

**Task management** - Define a notification rule which sends users a reminder 3 days before their assigned task is due, then on the same day and after that set a recurrent daily remainder for all the delayed tasks of the team.

**Project management** - Define notification rules to remind a project manager a week before a project milestone is about to end, and a recurrent notification when a project milestone is delayed (This can be...
a personal or a group notification). Notify billing about project milestones that should be invoiced in the upcoming week/month.

**Billing notifications** - Use the ability of the product to send notifications to users outside of the organization by defining notification rules to send reminders to a specific list of customers (by e-mail) about invoices they should pay in the upcoming week/month and a recurrent notification about delayed payments.

**Annual support services notification** - Send reminders to customers regarding the renewal of their support program.
## KEY FEATURES

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Define notifications per list/library</td>
<td>✓</td>
<td>Alerts only</td>
</tr>
<tr>
<td>Schedule and send recurrent notifications</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Choose between on screen and e-mail notifications</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Send notifications by email to users outside the organization</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Define property-based notification rules</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Notification options action menu</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Personal notifications web part</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Allow definitions of notifications in content types</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Cross browser - IE, Firefox and Google Chrome</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Multilingual support</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>
SOFTWARE REQUIREMENTS

SERVER REQUIREMENTS

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

CLIENT REQUIREMENTS

- Windows 7/8
- Microsoft Internet Explorer 9+, Mozilla Firefox (Latest version), Google Chrome (Latest version), Safari (Latest version).
INSTALLATION PROCEDURE

SHAREPOINT 2007

1. Log in using 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.
6. Reset the SharePoint timer service.

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

SHAREPOINT 2007

1. After completion of the installation, you will see a new KWizCom entry in Windows Start -> All Programs -> KWizCom containing the following programs:
   - **About KWizCom SharePoint Notification Feature**
     Display General Information about the component.
   - **Activate KWizCom SharePoint Notification Feature**
     This utility enables you (the SharePoint Administrator) to activate the downloaded evaluation version.
   - **KWizCom SharePoint Notification Feature Resource Editor**
     This utility enables you (the SharePoint Administrator) to translate the component to your local language.
     Please review the next sections for further details about component localization and activation.

2. When you browse your SharePoint server / Windows SharePoint services site, a new KWizCom SharePoint Notification web part will be available for you under "virtual Server Gallery".

3. **Before** implementers and end-users are able to use the SharePoint Notification Feature, the following configuration actions should be taken:
   - Go to Start< All Programs<Microsoft Office Server< SharePoint 3.0 Central Administration
   - Log on as the SharePoint administrator and go to the Operations tab
   - Scroll down to the **KWizCom SharePoint Notification Feature Settings** section

   ![Manage notifications settings]

   - Click the **Manage notifications settings**
     In this screen you need to choose a SharePoint site where all notification rules will be saved (in hidden lists).
Define the following settings:

- **Web Application** - select a Web application that hosts the site collection you want to support the notification feature.
- **Site Collection** - select the relevant site collection.
- **Web Site** - select a Web Site that should host all the internal notification data (not intended for use) - this site should be an administrative site that is not changed very often.
- **Maximum Logging Days** - select the maximum number of days to log the notification rule run.
- The Link [KWizCom SharePoint Notification Logging List](#) below opens the log list where you can review the logs created for each rule run.

That’s it! The Notification Feature is now ready for use.
1. Before implementers and end-users are able to use the SharePoint Notification Feature, the following configuration actions should be taken:
   
   - Go to Start > All Programs > Microsoft Office Server > SharePoint Central Administration
   - Log on as the SharePoint administrator and Scroll down to the **KWizCom Feature Administration** section

   - Click the **Manage notifications settings**
     In this screen you need to choose a SharePoint site where all notification rules will be saved (in hidden lists).

   ![SharePoint Notification Feature Settings](image-url)
Define the following settings:

- **Web Application** - select a Web application that hosts the site collection you want to support the notification feature.
- **Site Collection** - select the relevant site collection.
- **Web Site** - select a Web Site that should host all the internal notification data (not intended for use) - this site should be an administrative site that is not changed very often.
- **Maximum Logging Days** - select the maximum number of days to log the notification rule run.
- The Link [KWizCom SharePoint Notification Logging List](#) below opens the log list where you can review the logs created for each rule run.

2. Activate the **list notification web part feature** in site collections where you wish that web part to be available:
   - Go to the **Site Settings**
   - On **Site Collection Administration** select to navigate into the top level site settings (If it is not the current)
   - Select **Site collection features**
   - Activate KWizCom SharePoint Notification Web Part
UN-INSTALLATION PROCEDURE

SHAREPOINT 2007

1. Log in using SharePoint administrator account to your SharePoint front-end server.
2. Go to Control Panel and double-click Add or Remove Programs.
3. Select product 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 related to the product, 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):
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 SharePoint Notification Feature ->
   Activate KWizCom SharePoint Notification Feature.
b. Click the “KWizCom Products License Management”. You will be redirected to a page that allows you to manage all your installed KWizCom products:

![KWizCom Products List](image)

License scope for this Site Collection: http://sp2013/sites/notification-tests

- License and support services are up to date
- License or support services are about to expire in less than 30 days
- License or support services have expired

KWizCom - Knowledge Worker Components

---

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:

![KWizCom Products List](image)

KWizCom Products List · KWizCom SharePoint Notification Feature

Product Information

- Name: KWizCom SharePoint Notification Feature
- Version: 12.3.02

Farm License

Farm license applies to all site collections in your farm.

- Product Code: Not requested
- Request product code and start your evaluation license now!

---

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:

![KWizCom Products List](image)

KWizCom Products List · KWizCom SharePoint Notification Feature

Product Information

- Name: KWizCom SharePoint Notification Feature
- Version: 12.3.02

Farm License

- Farm license applies to all site collections in your farm.

- Product Code: V77ZG7S37PN710GV1T5VXMM9X9TMQ2JX0C1XAV5387-92Q8Y1AVJ277XX
- Copy to clipboard

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 simple separate them by ;
- Email will be sent every Monday 6:00 AM

License type: Evaluation
Expiration: Wednesday, September 18, 2013

Activate now
e. Copy the product code.


![Product Activation Request](image)

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.
LIST NOTIFICATIONS SETTINGS

INTRODUCTION

The List Notification Feature allows you as an administrator to configure notification/reminders for every required list. This section describes the notifications configuration steps.

SETTINGS PAGE PROPERTIES & CONFIGURATION OPTIONS

Go to the required list/library and choose Settings> List Settings> under General Settings click the KWizCom list notification settings

In SharePoint 2010/2013 you can get to the same settings page by going to the List’s “List” ribbon:
Once you click that link/menu the following settings page appears:

![SharePoint Notification Feature User Guide](image)
This page enables you to create several Notification Rules. To add a new notification rule you should configure the various properties (described hereunder) and then click the “Add Notification Rule” button to add the new rule. Below the “Add Notification Rule” button you can see all existing notification rules for the current list.

When adding/updating a notification rule you need to configure the following properties:

- **Notification name**- Give your notification rule a logical name that indicates the notification's purpose
- **Notification Start Date**- Select notification process start date
- **Notification Recurrence**- On the recurrence section choose the recurrence pattern:
  - **No Recurrence**- One time notification, after the notification runs the notification rule becomes inactive
  - **Immediate**- Choose to receive immediate notifications (similar to SharePoint alerts) with the following triggers: All changes, New items added, Existing items modified
  - **Daily**- Choose the number of days between the run of each notification
- **Weekly**: Choose the number of recurrences in one week and the days in which the notification will be run.

- **Monthly**: Choose the specific day of the month, and the number months between each notification.
For any recurrence option choose between the end date between the options:

- No end date
- End after: ___ occurrence(s)
- End By: (Date)
- Delete this rule when it becomes inactive- check this checkbox to remove the listing of a notification rule that reached its end date.
Target audience - Specify who should get the defined notification.

Choose the users which will receive the notification between:

- **Users/Groups** - add SharePoint or Active Directory groups, or specific users

- **Users/email addresses defined by a field in the current list** - Choose a field in the current list that contains email address or is a person-type field (such as “Assigned to” field in the Tasks list).

- **Users/email addresses defined by a field in another list** - This option enables you to define target email recipients for the notification rule, based on field located in another list, which is connected to the current list with a Lookup field.

  Example:
  You wish to configure a notification for your Orders list and send email notification to customers that have delayed payments. The customer email however, is not stored in the Orders list, it is stored in the Customers list which is connected to the Orders list with a Lookup field.
  By using this option, you can configure the notification to use the customer email field, taken from that Customers connected list.

  Choose the **Site** in which the list is located (it can be any site from the site collection)
- choose the List name
- choose the target Field containing the user/email information
- choose a rule "Where field:" = Tasks/field:" that connects the remote list with the current list that the notifications run on by comparing a field value from the remote list with a field value from the current list

Note that the condition may be true for more than one item in the remote list, but the field value used in the notification will be the first one returned by the condition,

**Example (cont.):** In customers list there are two items for the same company that contain different contacts, for a rule defined to lookup a contact's email when the customer in Orders list is equal to the customer name in Customers list, the email of the first contact only will be returned. This is demonstrated below:

**Orders list:**

<table>
<thead>
<tr>
<th>Order details</th>
<th>...</th>
<th>Customer</th>
<th>Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order1</td>
<td></td>
<td>KWizCom</td>
<td>Accepted</td>
</tr>
<tr>
<td>Order2</td>
<td></td>
<td>KWizCom</td>
<td>Delayed</td>
</tr>
<tr>
<td>Order3</td>
<td></td>
<td>KWizCom</td>
<td>Delayed</td>
</tr>
</tbody>
</table>

**Customers list:**

<table>
<thead>
<tr>
<th>Customer name</th>
<th>contact name</th>
<th>Contact email</th>
</tr>
</thead>
<tbody>
<tr>
<td>KWizCom</td>
<td>Sales</td>
<td><a href="mailto:sales@kwizcom.com">sales@kwizcom.com</a></td>
</tr>
<tr>
<td>KWizCom</td>
<td>Support</td>
<td><a href="mailto:support@kwizcom.com">support@kwizcom.com</a></td>
</tr>
<tr>
<td>...</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Static list of e-mail addresses**- Enter the e-mail addresses (internal or external) to send receive the notification

- **Notification Type**- Choose between e-mail notification to on screen (Displayed in the notification web part):
Send reminder by e-mail - Define the subject and the body of the e-mail, you may apply tokens to add data from the current item using this format: {Item:FieldName} (replace FieldName with the desired field from the list)

When you choose to send notifications by email, you have 2 sending options:

- **Send an email message for every list item processed by the notification rule** – In this case a separate email message will be sent for each item that satisfies the notification rule.
- **Send a single email message for the notification rule** – In this case a single email message is sent per notification rule. That email message aggregates all items that satisfied that rule and displays all notifications in a table view in the email message’s body.

- **Show in personal notification web part** - Define the display text of the notification with free text and dynamic data using field tokens (to use the tokens apply the same format as for the e-mail reminders)
REMARK:
Both notification type checkboxes are active only after you select a valid target audience.

- Apply notifications on the following items-

In this section you define for which list items the notification should be sent. You do that by defining a query. This query is executed by the Notification engine to retrieve the list items that comply with the query, and for each of them a notification will be sent to the target audience.

You have 2 ways to define that query/condition:

- **View**- Choose the list view that will be used to filter the items

- **Custom Conditions**- To define a more specific rule-based condition for running the notifications create a custom condition by choosing a field from the current list, an operator (less than, equals to, etc.) and a value that can be calculated and supports the [Today] and [Me] tokens.

- **Add Notification Rule**: Click to save the current configured notification rule settings.
Current list rules:
This grid display all existing notification rules for the list.

- **Name** - The name of the notification rule
- **Active** - Checked by default, uncheck to make the notification rule inactive
- **Last Run** - The date and time of the last run of the notification rule **which is also a** link to a log list that documents all the notification rule runs and may be used from trouble shooting in case there was an unexpected result of a run.
- **Edit** - Click to change the notification rule settings
- **Delete** - Click to delete the notification rule
- **Notification Details** - Hover over the notification rule to see a summary of the notification rule settings (Who to notify, recurrence, conditions and rule status)
PERSONAL NOTIFICATIONS/REMINDERS

INTRODUCTION

As an end-user, you can create personal reminders on a specific list item. These personal reminders are displayed in the Notifications web part (more details in the next section).

CONFIGURING PERSONAL REMINDERS

If you wish to get a reminder notification for a specific list item, use the item’s drop-down menus to set a reminder to one of the following options:
If you are using SharePoint 2010/2013, you can also use the “Notify Me” ribbon button once you check a selected list item:
THE NOTIFICATION WEB PART

The notifications web part displays notifications/reminders to end-users. Before you can use this web part, you need to activate that web part’s feature at the site collection level:

1. Go to Site Settings
2. On Site Collection Administration select to navigate into the top level site settings (if it is not the current)
3. Select Site collection features
4. Activate KWizCom SharePoint Notification Web Part

To add the web part to a page:
1. Go to the required page, logged in as the site's administrator and click Site Actions> Edit Page
2. On the preferred web part zone click Add a Web Part
3. On the pop-up window that appears scroll to the Miscellaneous section
4. There you will find the KWizCom SharePoint Notification Web Part, check the check box near the web part's icon and click Add

Now you can see the web part in your page, all that's left is to configure the web part's settings.
WEB PART PROPERTIES & CONFIGURATION OPTIONS

The web part's properties are set by clicking on the **Edit Web Part > Modify Web Part Settings:**

![Image of web part properties and configuration options]

You should cancel popup blocker for the current site in the tool part to work properly.
Display Settings

Display settings for KWizCom notification web part
- Show header
- Display a header on the top of the web part

Header text

My Notifications
Header text on the top of the web part

- Show overdue group
- Display overdue notifications group

- Expand overdue group
  Expand overdue notifications group by default

- Show today group
- Display Today notifications group

- Expand today group
  Expand today notifications group by default

- Show tomorrow group
- Display tomorrow notifications group

- Expand tomorrow group
  Expand tomorrow notifications group by default

- Show this week group
- Display this week notifications group

- Expand this week group
  Expand this week notifications group by default

- Show event group

OK  Cancel  Apply
<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show header</td>
<td>Check this checkbox to show a header text on top of the web part</td>
<td></td>
</tr>
<tr>
<td>Header text</td>
<td>Set the header text to be shown on top of the web part</td>
<td>Relevant only if the Show Header checkbox is checked</td>
</tr>
<tr>
<td>Show overdue group</td>
<td>Check this checkbox to show overdue notifications on the web part</td>
<td></td>
</tr>
<tr>
<td>Expand overdue group</td>
<td>Check this checkbox to expand this group by default on the web part</td>
<td></td>
</tr>
<tr>
<td>Show today group</td>
<td>Check this checkbox to show notifications due today on the web part</td>
<td></td>
</tr>
<tr>
<td>Expand today group</td>
<td>Check this checkbox to expand this group by default on the web part</td>
<td></td>
</tr>
<tr>
<td>Show tomorrow group</td>
<td>Check this checkbox to show notifications due tomorrow on the web part</td>
<td></td>
</tr>
<tr>
<td>Expand tomorrow group</td>
<td>Check this checkbox to expand this group by default on the web part</td>
<td></td>
</tr>
<tr>
<td>Show this week group</td>
<td>Check this checkbox to show notifications due this week on the web part</td>
<td></td>
</tr>
<tr>
<td>Expand this week group</td>
<td>Check this checkbox to expand this group by default on the web part</td>
<td></td>
</tr>
<tr>
<td>Show next week group</td>
<td>Check this checkbox to show notifications due next week on the web part</td>
<td></td>
</tr>
<tr>
<td>Expand next week group</td>
<td>Check this checkbox to expand this group by default on the web part</td>
<td></td>
</tr>
<tr>
<td>Open in current window</td>
<td>Open the notification details in the current window when clicking on the notification</td>
<td>Uncheck to open the notification in a new window</td>
</tr>
<tr>
<td>Confirm before remove</td>
<td>Prompt user to confirm the removal of an overdue notification</td>
<td></td>
</tr>
</tbody>
</table>
FAQ

DO I HAVE TO INSTALL ANYTHING ON MY COMPANY’S PCS?

No. The KWizCom SharePoint Notification Feature is a server installation. Once installed on the server, it can be used from any client-PC connected to it.

I INSTALLED THE FEATURE BUT WHEN I TRY TO CREATE A NOTIFICATION I GET A RED WARNING MESSAGE SAYING THE CONFIGURATION IS NOT COMPLETE, WHAT TO DO?

Go to the ACTIVATING KWIZCOM SHAREPOINT NOTIFICATION FEATURE section and follow the steps to complete the installation of the notification feature and then you will be able to create any desired notification rules.

I CONFIGURED ALL THE NOTIFICATION RULES SETTINGS I NEED AND CLICKED OK BUT NOTHING HAPPENED, HOW DO I FIX THIS?

After configuring all the desired settings, make sure you click the Add Notification Rule button, this saves your new notification rule's settings, you should be able to see, edit and delete your notification rule under the Current rules list.
VERSION RELEASE NOTES

Version release notes are available here:

http://www.kwizcom.com/sharepoint-add-ons/sharepoint-notification-feature/release-notes/