

KWizCom Corporation

SharePoint Aggregated Calculation Field Type

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

PRODUCT OVERVIEW

The *SharePoint Aggregated Calculation field type* display calculated summary functions and KPI's*, based on aggregated data from a required list & View.



Unlike out-of-the-box SharePoint calculated column which can display calculated values based on the current item's columns, the Aggregated Calculation column enables you to display summary calculated values based on many aggregated items from any other list.

* Together with the KWizCom KPI field type.

WHY DID WE BUILD IT?

The most common scenario for using the aggregated calculation column would be an Enterprise Project Management (EPM) portal.

A typical EPM portal is required to display various aggregated summary data and KPI's*, based on multiple project sites.

With the Aggregated Calculation column one can easily display calculated values and KPI's* such as:

- Number of delayed tasks in each project
- % of completed milestones
- Total sum of remaining payable milestones

All these examples require running a summary function on a filtered list of items.

* Together with the KWizCom KPI field type.

KEY FEATURES

Feature
Display summary functions (Count, Sum, Avg etc.) on remote list views.
Add C#-style formulas
Use current list column values as dynamic properties.
Optionally allow end-user to change the configured summary function.
Enable configuring cache priod.
Enable configuring auto-refresh period.
Integrate with KWizCom KPI column and Conditional formatting column.
Cross-browser
Multi-lingual

INSTALLATION GUIDE

SOFTWARE REQUIREMENTS

SERVER REQUIREMENTS

- SharePoint Server/Foundation 2010/2013/2016

CLIENT REQUIREMENTS

- Microsoft Internet Explorer 9.0 +, Firefox (latest version), Google Chrome (latest version), Safari (Latest version).
- Windows 7+, Mac OS X V10.9

INSTALLATION PROCEDURE

SHAREPOINT 2010/2013/2016

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.

POST INSTALLATION

SHAREPOINT 2010/2013/2016

1. After completing the package installation and deployment new “Aggregated Calculation” column type will be available when you add a new list column.

UN-INSTALLATION PROCEDURE

SHAREPOINT 2010/2013/2016

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 KWizCom Aggregated Calculation field type, including: product localization, product configuration and customization.

PRODUCT ACTIVATION

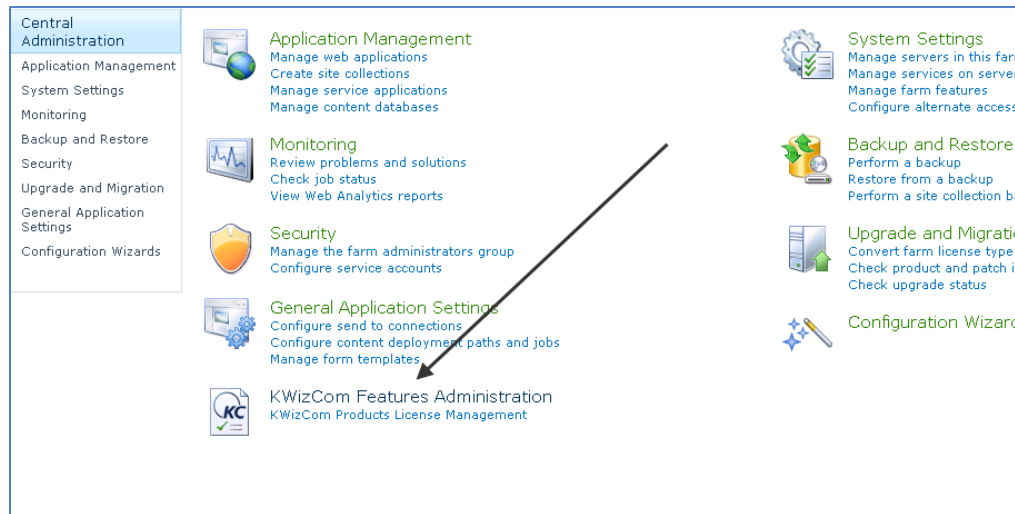
KWizCom products are available for evaluation prior to purchase.

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.

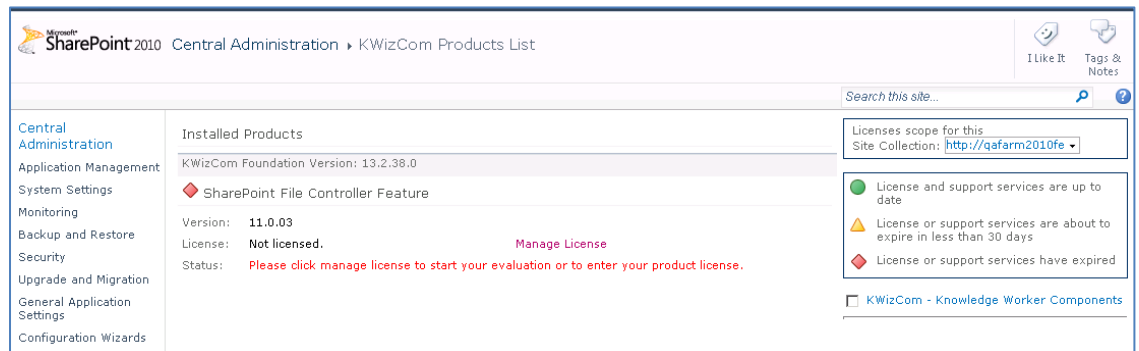
Once you decide to purchase a KWizCom component you will need to **order** and then to **activate** the product. The steps that need to be taken next are listed below.

SHAREPOINT 2010/2013/2016

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 Features Administration icon. You will be redirected to a page that allows you to manage all your installed KWizCom products' licenses:



- 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:

Product Information	
Name:	SharePoint File Controller Feature
Version:	11.0.03
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!
Web application or site collection license management	
If you have a license for one web application or site collection, you can enter it here. Simply choose the site collection you wish to activate the license on from the picker and enter the Site Collection: http://qafarm2010fe	
Use the form below to activate SharePoint File Controller Feature on one the selected site collection or web application only.	
Web Application License	
Web application license applies to all site collections under the same URL, for example: http://sharepoint, http://sharepoint/sites/sales etc...	
Product Code:	Not requested Request product code and start your evaluation license now!
Site Collection License	
Site collection license applies only to one specific site and it's sub sites.	
Product Code:	Not requested Request product code and start your evaluation license now!

- d. Click on the “Request product code and start your evaluation now” link. A product code will be generated and displayed as in the following screenshot:

Product Information	
Name:	SharePoint File Controller Feature
Version:	11.0.03
Farm License	
Farm license applies to all site collections in your farm.	
Product Code:	TNWXV07J8[07QZMJUVEVHJ8MMEVH7QMM57885VVV5JVM-.5VQMUM.MM]MVNXJX Copy to clipboard
Activation Code:	<input type="text"/> Activate now!
License Notifications:	<input type="text"/> Update
Optionally, enter your email address to get notified when your license is exceeded or about to expire. To enter more than one email	
License type:	Evaluation
Expiration:	Thursday, November 18, 2010
Web application or site collection license management	
If you have a license for one web application or site collection, you can enter it here. Simply choose the site collection you wish to activate the license on from Site Collection: http://qafarm2010fe	
Use the form below to activate SharePoint File Controller Feature on one the selected site collection or web application only.	
Web Application License	
Web application license applies to all site collections under the same URL, for example: http://sharepoint, http://sharepoint/sites/sales etc...	
Product Code:	Not requested Request product code and start your evaluation license now!
Site Collection License	

- e. Copy the product code.
- f. Browse the *Product Activation Request* page on KWizCom’s web site: <http://www.kwizcom.com/ProductReg>.

Product Activation Request

In order to deactivate a product please [click here](#).

This Product Activation Form is used to get your product activation key after you have purchased the product.

Please fill out the following form. Once we get your product activation request, a product activation key will be sent to you by email, along with the activation process description.

*Customer Name:

*E-mail address:

*Share-It Order/Invoice Number:

*Product Code:

*License Type:

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

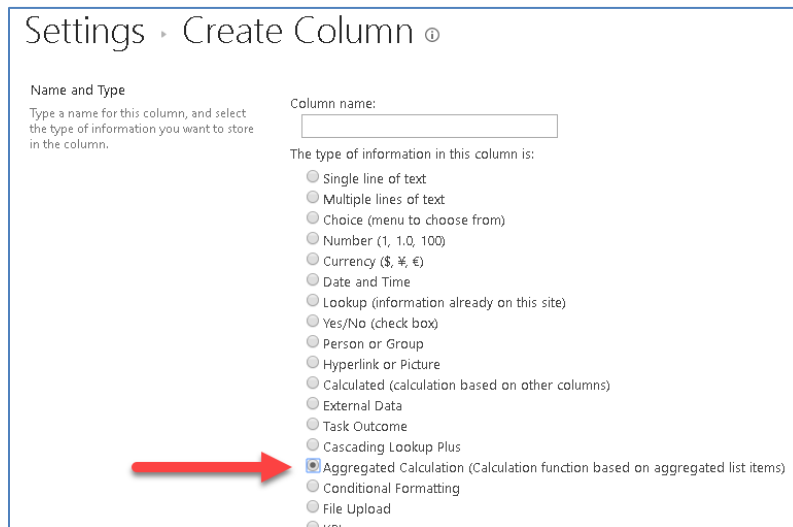
- g. Once your order is confirmed, you will receive the Activation Code for your product by email.
- h. Copy the activation code into the “Activation Code” field in the product’s license management page and click “Activate now!” link.

Product Information	
Name:	SharePoint File Controller Feature
Version:	11.0.03
Farm License	
Farm license applies to all site collections in your farm.	
Product Code:	TNWW07J8[07QZMJUVEVHJ8MMEVH7QJMM57885VVVV5JVM-.5VQMUM.MM]MVNXJX Copy to clipboard
Activation Code:	<input type="text"/> Activate now!
License Notifications:	<input type="text"/> Update
License type:	Evaluation
Expiration:	Thursday, November 18, 2010
Web application or site collection license management	
If you have a license for one web application or site collection, you can enter it here. Simply choose the site collection you wish to activate the license.	
Site Collection:	http://qafarm2010fe ▼
Use the form below to activate SharePoint File Controller Feature on one the selected site collection or web application only.	
Web Application License	
Web application license applies to all site collections under the same URL, for example: http://sharepoint, http://sharepoint/sites/sales etc...	
Product Code:	Not requested Request product code and start your evaluation license now!
Site Collection License	
Site collection license applies only to one specific site and it's sub sites.	

That's it! Your product is now fully activated.

AGGREGATED CALCULATION COLUMN SETTINGS PAGE

To create a new Aggregated Calculation column, create a new column and select the “Aggregated Calculation” type:



Settings > Create Column ⓘ

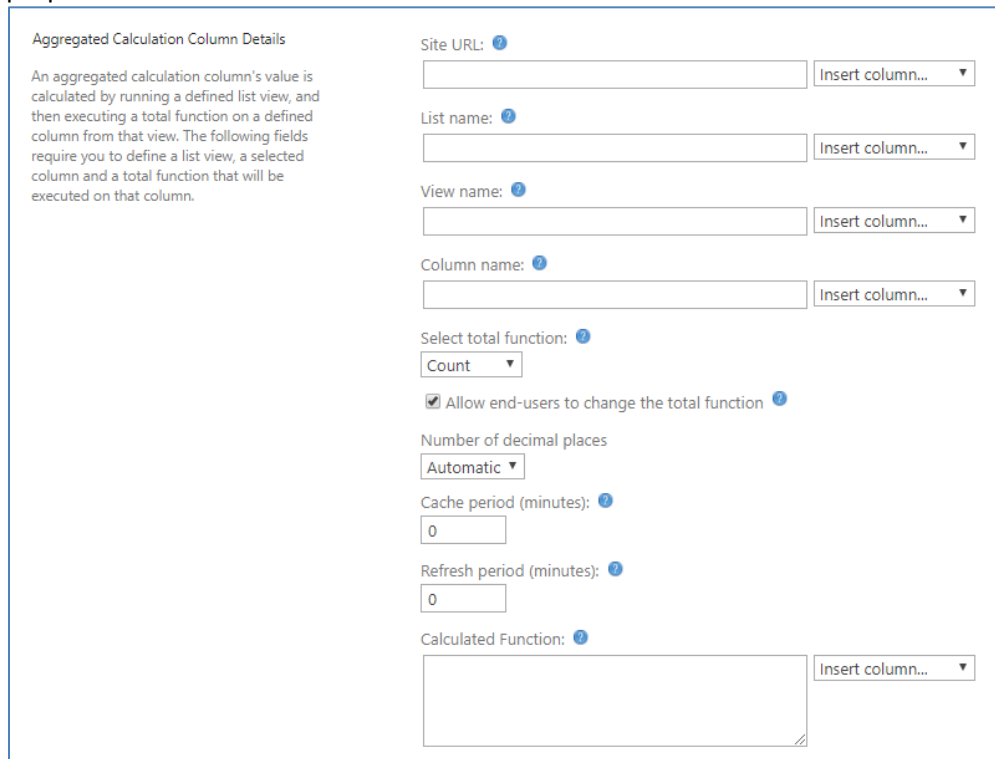
Name and Type
Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- External Data
- Task Outcome
- Cascading Lookup Plus
- Aggregated Calculation (Calculation function based on aggregated list items)
- Conditional Formatting
- File Upload
- ...

After choosing the “Aggregated Calculation” column type, you need to configure the following field properties:



Aggregated Calculation Column Details

An aggregated calculation column's value is calculated by running a defined list view, and then executing a total function on a defined column from that view. The following fields require you to define a list view, a selected column and a total function that will be executed on that column.

Site URL: ⓘ

List name: ⓘ

View name: ⓘ

Column name: ⓘ

Select total function: ⓘ

Allow end-users to change the total function ⓘ

Number of decimal places

Cache period (minutes): ⓘ

Refresh period (minutes): ⓘ

Calculated Function: ⓘ

Property name	Description
Site URL	Type the full URL of the site where the target list is located. You can also use the following dynamic tokens: <ul style="list-style-type: none"> • [current site] • [site collection] You can also use current list column values as part of your URL string, simply select a column from the drop-down list.
List name	Type the name of the list which includes the aggregating view you wish to use. You can also use current list column values, simply select a column from the drop-down list.
View name	Type the name of the aggregating view. This view will be used to filter and sort items from the target list. You can also use current list column values, simply select a column from the drop-down list.
Column name	Type the name of the column that you wish to run a summary function on. You can also use current list column values, simply select a column from the drop-down list.
Select total function	This function will be executed on the items returned by the aggregating view, on the selected column. You can use one of the following functions: <ul style="list-style-type: none"> • Count - counts the number of items returned by the aggregating view. • Average - calculates the average of selected column. • Maximum - calculates the maximum value of selected column. • Minimum - calculates the minimum value of selected column. • Sum - summarizes the selected column value from all items returned by the aggregating view. • Value - returns the selected column value as-is from the 1st item returned by the aggregating view.
Allow end-users to change the total function	Check this property to enable end-users to switch between the total functions, by displaying a drop-down with all the available total-functions in New/Edit item. Once an end-user changes the column's summary function in a specific item, it will disconnect the column's displayed function from its settings for that specific item.
Number of decimal places	Select how many digits you want to be displayed in the decimal part of the displayed number.
Cache period (minutes)	Type a positive number that defines the number of minutes in which the result aggregated calculation value will be cached. Caching this value improves the page load time. "0" value means no caching performed.
Refresh period (minutes)	Check this property if you want the column value to refresh automatically every defined period of time. "0" value means no automatic refresh performed.
Calculated Function	In additiona to running a summary function, you can add another function that will be calculated based on the result number. You can use math, string and date function, written in C#-style.

INTEGRATION WITH OTHER KWIZCOM PRODUCTS

Aggregated Calculation field type support integration with the following KWizCom products:

- **KPI field type** you can shet up KPI display rules that rely on values of the Aggregated Calculation field.
- **Conditional Formatting field type** you can shet up Conditional Formatting display rules that rely on values of the Aggregated Calculation field.