



KWizCom Forms



User Guide

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Introduction

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

This document describes the capabilities added to the SharePoint list forms, enabling you to implement enhanced & powerful web forms.

Overview

True SharePoint-Native
Forms & Mobile Solution

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

The product enable site owners/administrators to configure the SharePoint list forms and add various types of form features.

As an end-user you will see the same SharePoint list forms, but this time with more features.

KWizCom Forms includes the following exciting web forms features:

- [Field level permissions](#)
- [Field level constraints](#)
- [Dynamic Default values](#)
- [Field grouping](#)
- [View level permissions](#)

Dynamic Field-Level Permissions

SharePoint out-of-the-box allows configuring item level permissions, which means: a site owner can define access permissions for a whole list item.

So what's the problem?

Sometimes, you need to configure read permissions to a part of a list item, at the field level.

In such case, you would like some users to be able to view some fields, while other users should be able to see a different set of fields.

SharePoint does not allow you to configure permissions in field-level, which means: you can configure permissions only for a whole list item and not for some fields in that item.

With KWizCom Forms a site owner can define which fields should be visible/active to specific users/groups, so the result is: the same list form displays different fields to different users!

Example:

Using the KWizCom Forms, a site owner configured the *Tasks* list to display the "Due Date" field disabled, so that end-users won't be able to change their assigned tasks' due date value:

The screenshot shows a window titled "Tasks - My Task" with a standard Windows-style title bar. Below the title bar is a ribbon menu with the following groups: "Commit" (Save, Cancel), "Clipboard" (Paste, Copy), "Actions" (Delete Item, Attach File), and "Spelling" (Spelling). The main form area contains the following fields:

- Title *: My Task
- Predecessor: [Dropdown]
- Priority: (2) Normal [Dropdown]
- Status: In Progress [Dropdown]
- % Complete: [Text] %
- Assigned To: sales1 ;
Enter users separated with semicolons.
- Description: [Text Area]
- Start Date: 12/5/2013 [Calendar Icon]
- Due Date: 12/12/2013
- Created at 12/5/2013 7:09 AM by A
Last modified at 12/5/2013 7:10 AM

At the bottom right of the form are "Save" and "Cancel" buttons. A blue callout bubble with white text points to the "Assigned To" and "Due Date" fields, stating: "Users can't change their assigned tasks due date".

When a manager edits the same task; the "Due Date" will be visible and active:

The screenshot shows a window titled "Tasks - My Task" with an "Edit" tab. The interface includes a ribbon with "Commit", "Clipboard", "Actions", and "Spelling" groups. The form fields are as follows:

Title *	My Task
Predecessor	
Priority	(2) Normal
Status	In Progress
% Complete	
Assigned To	sales1 ;
Description	
Start Date	12/5/2013
Due Date	12/12/2013

Created at 12/5/2013 7:09 AM by Administrator
Last modified at 12/5/2013 7:10 AM by Administrator

So as you can see – the same Tasks Edit form behaves now differently for different types of users!

Field-Level Constraints

With Field-level constraints, site owner can easily define field-validation constraints to enforce field input patterns according to required form logic. This enables validating the user input, and to enforce various input patterns such as:

- Email
- Social security number
- Credit card number
- Any other custom pattern

Example:

In this example, the site owner configured a constraint in the *Tasks* list that enforces "Due Date" field to be later than the "Start Date" field. When an end-user tries to update a Task item, where the Start Date field value is later than the Due Date field value, he will get the following validation error:

The screenshot shows a form with the following fields and values:

Assigned To	<input type="text"/>
Description	<div style="border: 1px solid #ccc; padding: 5px;"><p>Rich text editor toolbar with icons for bold, italic, underline, list, link, etc.</p><div style="height: 100px;"></div></div>
Start Date	12/15/2010 <input type="button" value="Calendar"/>
Due Date	12/13/2010 <input type="button" value="Calendar"/>
Approved	<input type="checkbox"/>

Below the Due Date field, a red error message is displayed: "Due date must be later than the task's starting date". A red arrow points from the error message back to the Due Date field.

At the bottom of the form are two buttons: "Save" and "Cancel".

Dynamic Default Values

With SharePoint out-of-the-box, site owner can configure default values for various list fields. These default values appear when an end-user creates a new list item.

The existing gaps are:

- For some types of fields you cannot configure default value (Lookup field, Person field).
- Sometimes you need different default values for different users.
- Sometimes you need to have a field reload its default value after user updates values of other fields in the form

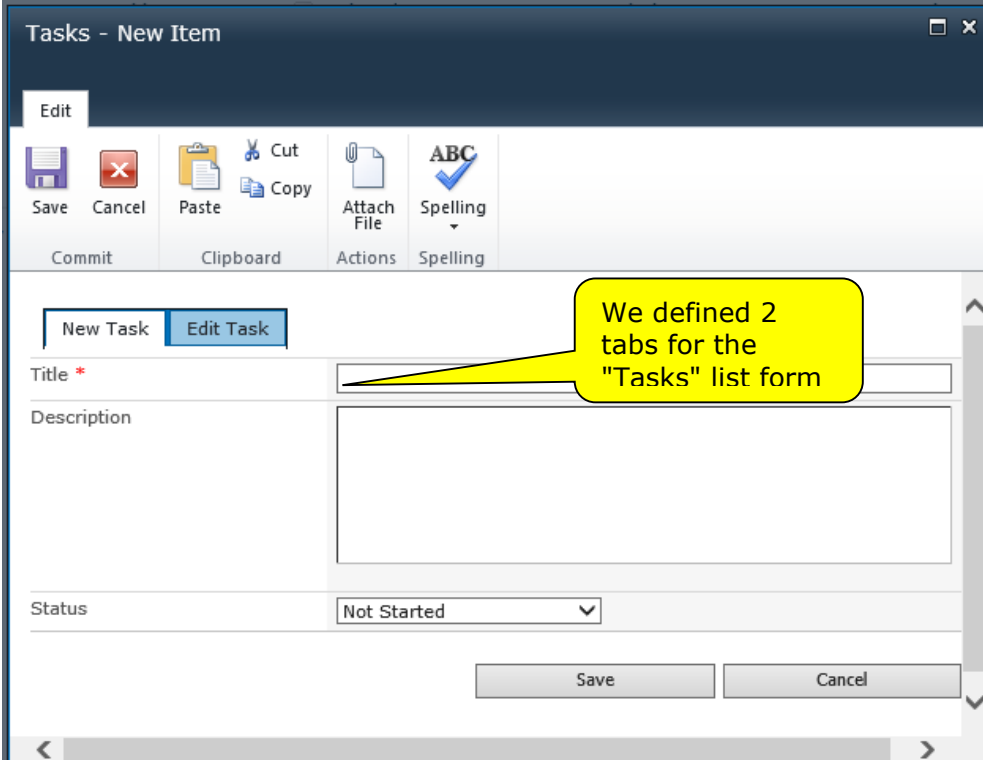
With KWizCom Forms, site owner can overcome those gaps.

You can configure default values for field types that out of the box SharePoint does not enable (such as "Person" or "Lookup" fields) and you can configure different default values for different users/groups as well. Also, site owners can implement more dynamic scenarios where default values are retrieved from external sources such as you company's CRM or ERP systems.

Field Grouping

Ever tried to fill-out a SharePoint list form with 20 fields? 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.



The screenshot shows a web browser window titled "Tasks - New Item". At the top, there is a ribbon with an "Edit" tab selected. The ribbon contains several groups of icons: "Commit" (Save, Cancel), "Clipboard" (Paste, Copy), "Actions" (Attach File), and "Spelling" (ABC, Spelling). Below the ribbon, there are two tabs: "New Task" and "Edit Task". The "Edit Task" tab is active. The form fields include: "Title *" (text input), "Description" (text area), and "Status" (dropdown menu with "Not Started" selected). At the bottom, there are "Save" and "Cancel" buttons. A yellow callout bubble with a pointer to the "Edit Task" tab contains the text: "We defined 2 tabs for the 'Tasks' list form".

and...now you can easily customize that form without any technical/power-user skills required!

You can now easily create multi-column forms where you define the exact location and width of each field, all in less than 2 minutes!

View Level Permissions

SharePoint views display list data, filtered by some criteria and also sorted and grouped by some fields. This enables displaying different set of items according to some logic.

For example: in a Tasks list, you have several pre-defined views such as:

“All Tasks” – displays all the tasks in the list

“My Tasks” – displays only tasks that are assigned to the current user

“Active Tasks” – displays only tasks that their status is not “Closed”

Sometimes you would like to hide a view from specific users/groups.

SharePoint does not support view-level permissions, so you cannot do that with SharePoint out-of-the-box.

With KWizCom Forms, a site owner can configure view visibility rules, and this way he can hide selected views from specific users/groups of users.

Example:

In this example the site owner configured the Tasks list, so that the “Active Tasks” view will be hidden for all employees:

KWizCom > Tasks

Tasks

Use the Tasks list to keep track of work that you or your team needs to complete.

New Actions Settings View: **All Tasks**

ID	Title	Assigned To	Status	Priority	Due Date	% Complete
	aaaa	SRV2K3\jnimrod	Not Started	(2) Normal		
	new	SRV2K3\jnimrod	Not Started	(2) Normal		

"Active Tasks" doesn't show in the list "Views" drop-down.

▶ Access to view is denied

A configurable error page displayed to unauthorized users trying to directly browse the view page.

According to current view permissions this view is not available. What would you like to do?

Go to next available view

Return to homepage