Business Charts 1.0

User Guide

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Our web site: http://www.boostsolutions.com

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1. Introduction

BoostSolutions Business Charts provides a quick and convenient way to create insightful business charts in a SharePoint Web Part or directly in SharePoint list. Business Charts supports multiple popular external databases that can be used as the data source. 5 types of charts are available to fulfill your different business requirements.

The user guide is used to instruct the users to configure and use this product.

For the latest copy of this and other guides, please visit the link provided:

http://www.boostsolutions.com/download-documentation.html

2. Installation

2.1 Product Files

After you download and unzip the Business Charts zip file from www.boostsolutions.com, you will find the following files:

Path	Descriptions
Setup.exe	A program that installs and deploys the WSP solution packages to the SharePoint farm.
EULA.rtf	The product End-User-License-Agreement.
Business Charts_V1_User Guide.pdf	User guide for Business Charts in PDF format.
Library\2.0\Setup.exe	The product installer for .Net Framework 2.0.
Library\2.0\Setup.exe.config	A file containing the configuration information for the installer.
Library\4.0\Setup.exe	The product installer for .Net Framework 4.0.
Library\4.0\Setup.exe.config	A file containing the configuration information for the installer.
Solutions\Foundtion\ BoostSolutions.FoundationSetup12.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Foundtion\ BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundtion\ BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\BusinessCharts\ BoostSolutions.BusinessCharts14.1.wsp	A SharePoint solution package containing Business Charts files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\BusinessCharts\ BoostSolutions.BusinessCharts15.1.wsp	A SharePoint solution package containing Business Charts files and resources for SharePoint 2013 or SharePoint Foundation 2013.

2.2 Software Requirements

Before you install Business Charts, ensure your system meets the following requirements:

SharePoint 2013

Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1
Server	Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5
Browser	Microsoft Internet Explorer 8 or above Mozilla Firefox Google Chrome

SharePoint 2010

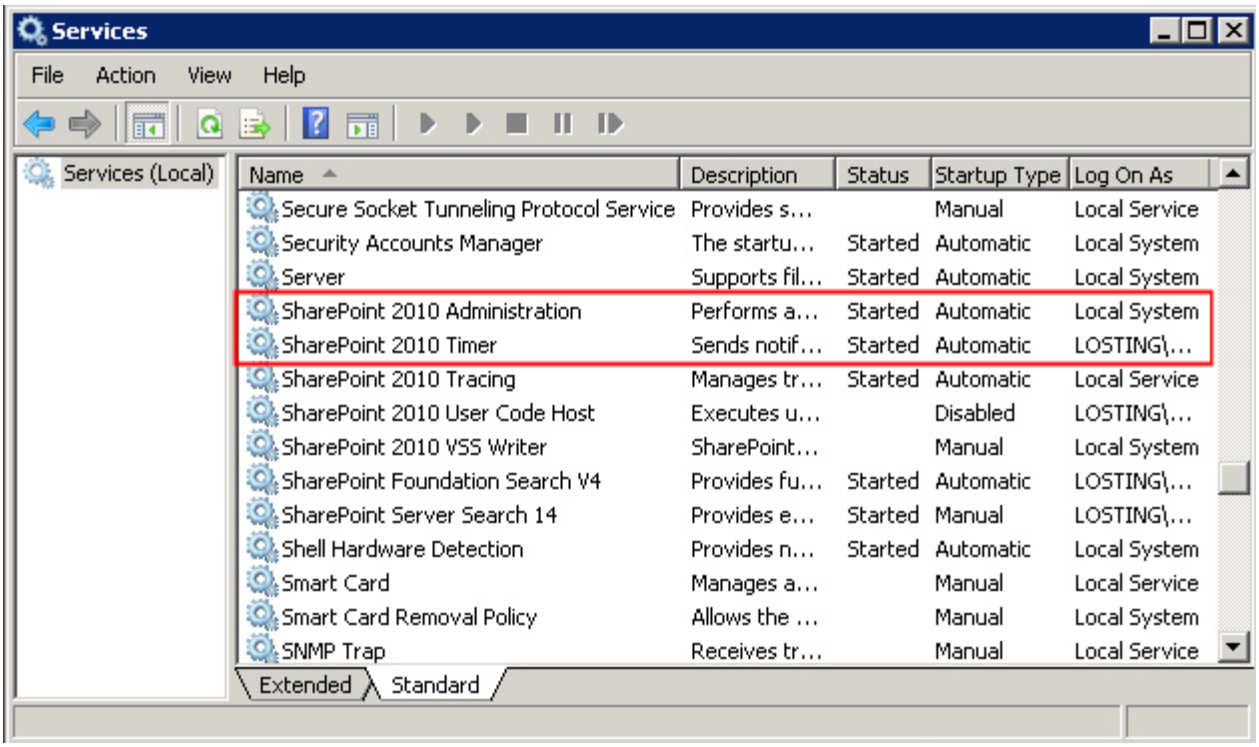
Operating System	Microsoft Windows Server 2008 x64 Microsoft Windows Server 2008 R2
Server	Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010 Microsoft .NET Framework 3.5
Browser	Microsoft Internet Explorer 8 or above Mozilla Firefox Google Chrome

2.3 Installation

Follow these steps to install Business Charts on your SharePoint servers.

Installation Preconditions

Before you start installing the product, please make sure these services are started on your SharePoint servers: **SharePoint Administration** and **SharePoint Timer**.



Business Charts must be run on one front-end Web server in the SharePoint farm where **Microsoft SharePoint Foundation Web Application services** are running. Check **Central Administration → System Settings** for a list of servers running this service.

Required Permissions

To perform this procedure, you must have specific permissions and rights.

- Member of the local server's **Administrators** group.
- Member of the **Farm Administrators** group.

To install Business Charts on SharePoint server.

a. Download the zip file (*.zip) of the product of your choice from the BoostSolutions website, then extract the file.

b. Open the created folder and run the **Setup.exe** file.

> ***Note*** If you cannot run the setup file, please right click the **Setup.exe** file and choose Run as administrator.

c. A system check is performed to verify if your machine meets all the requirements for installing the product. After the system check is finished, click **Next**.

d. Review and accept the End-User License Agreement and click **Next**.

e. In the **Web Application Deployment Targets**, select the web applications you are going to install and click **Next**.

> ***Note*** If you select **Automatically activate features**, the product features will be activated in the target site collection during the installation process. If you want to manually activate the product feature later, uncheck this box.

f. Upon completion of the installation, details are displayed showing which web applications you product has been installed to. Click **Close**.

2.4 Upgrade

Download the latest version of our product and run the **Setup.exe** file.

In the **Program Maintenance** window, select **Upgrade** and click **Next**.

2.5 Uninstallation

If you want to uninstall the product, double-click the **Setup.exe** file.

In the **Repair or Remove** window, select **Remove** and click **Next**. Then the application will be removed.

2.6 Command_Line Installation

The following instructions are for installing the solution files for Business Charts in SharePoint 2010 using the SharePoint STSADM command line tool.

Required permissions

To use STSADM, you must be a member of the local Administrators group on the server.

To install Business Charts to SharePoint servers.

If you have installed BoostSolutions products before, please skip the steps for the installation of Foundation.

a. Extract the files from the product zip pack to a folder on one SharePoint server.

b. Open a command prompt and make sure your path is set with the SharePoint bin directory.

- **SharePoint 2010**

  C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\BIN

- **SharePoint 2013**

  C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\BIN

c. Add the solution files to SharePoint in the STSADM command line tool.

stsadm -o addsolution -filename BoostSolutions.BusinessCharts14.1.wsp

stsadm -o addsolution -filename BoostSolutions.FoundationSetup14.1.wsp

d. Deploy the added solution with the following command:

stsadm -o deploysolution -name BoostSolutions.BusinessCharts14.1.wsp -allowgacdeployment –url [virtual server url] –immediate

stsadm -o deploysolution -name BoostSolutions.FoundationSetup14.1.wsp -allowgacdeployment –url [virtual server url] –immediate

e. Wait for the deployment to complete. Check the final status of the deployment with this command:

stsadm -o displaysolution -name BoostSolutions.BusinessCharts14.1.wsp

stsadm -o displaysolution -name BoostSolutions.FoundationSetup14.1.wsp

The result should contain a <Deployed> parameter for which the value is TRUE.

f. In the STSADM tool, activate the features.

stsadm -o activatefeature -name BoostSolutions.BusinessCharts –url [site collection url] –force

To remove Business Charts from SharePoint servers.

a. Removal is initiated with the following command:

stsadm -o retractsolution -name BoostSolutions.BusinessCharts14.1.wsp -immediate -url [virtual server url]

b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

stsadm -o displaysolution -name BoostSolutions.BusinessCharts14.1.wsp

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

c. Remove the solution from the SharePoint solutions storage:

```
stsadm -o deletesolution -name BoostSolutions.BusinessCharts14.1.wsp
```

To remove BoostSolutions Foundation from SharePoint servers.

The BoostSolutions Foundation is designed to provide a centralized interface to manage licenses for all BoostSolutions software from within SharePoint Central Administration. If are still using BoostSolutions product on your SharePoint server, DO NOT remove Foundation from the servers.

a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.FoundationSetup14.1.wsp –immediate –url [virtual server url]
```

b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

```
stsadm -o displaysolution -name BoostSolutions.FoundationSetup14.1.wsp
```

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

c. Remove the solution from the SharePoint solutions storage:

```
stsadm -o deletesolution -name BoostSolutions.FoundationSetup14.1.wsp
```

2.7 Feature Activation

Activate features in site collection

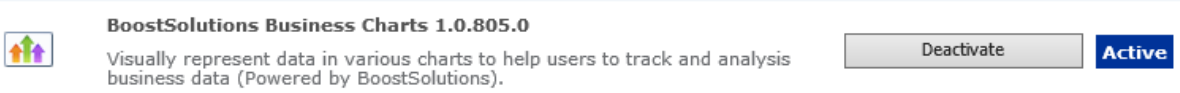
By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually.

a. On the Site Actions menu

click **Site Settings**.

b. Under **Site Collection Administration** click **Site collection features**.

c. Find the application feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.

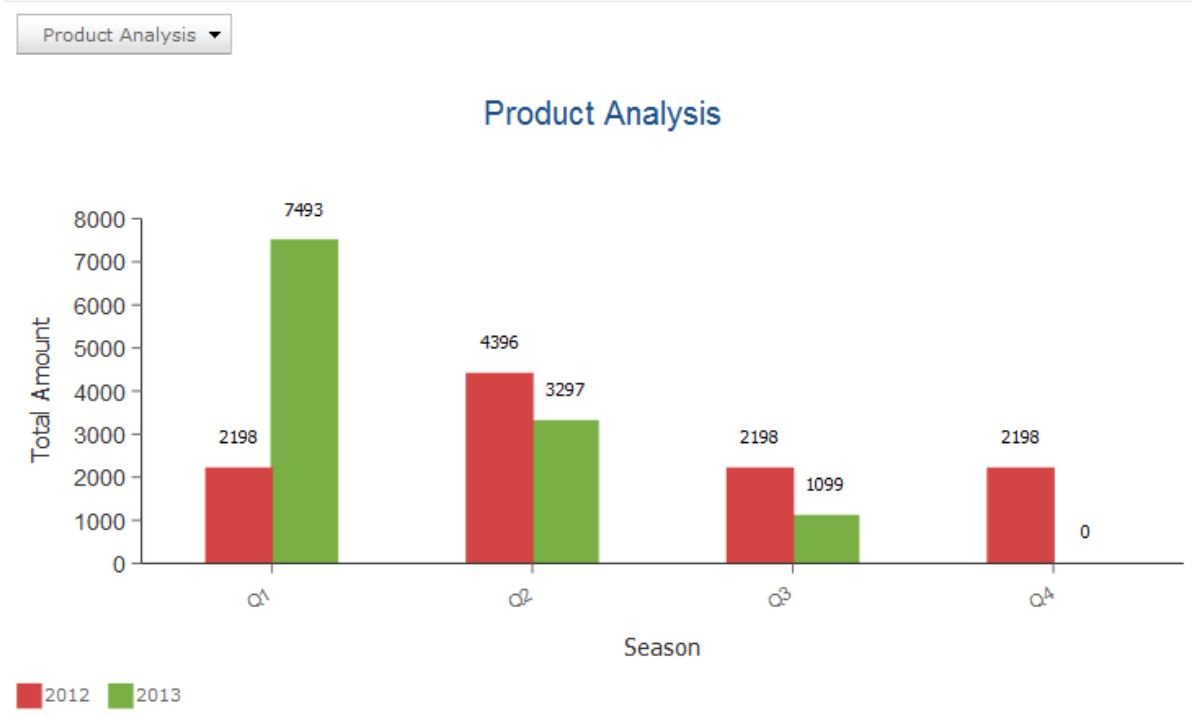


3. About Business Charts

Business Charts gives you an easy way to manage your business data with charts. You can create charts in the web part or analyze list data directly in every individual list.

3.1 Business Charts Web Part

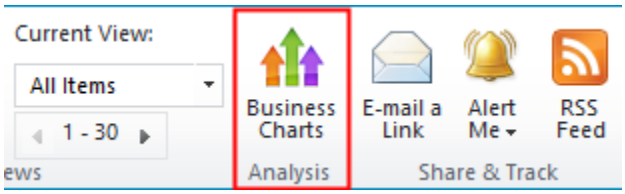
The Business Charts Web Part is just like the SharePoint Web Part, you can create it by inserting the web part in a page and connect it to the specified data source to create a chart, including SharePoint list, MS SQL and ORACLE.

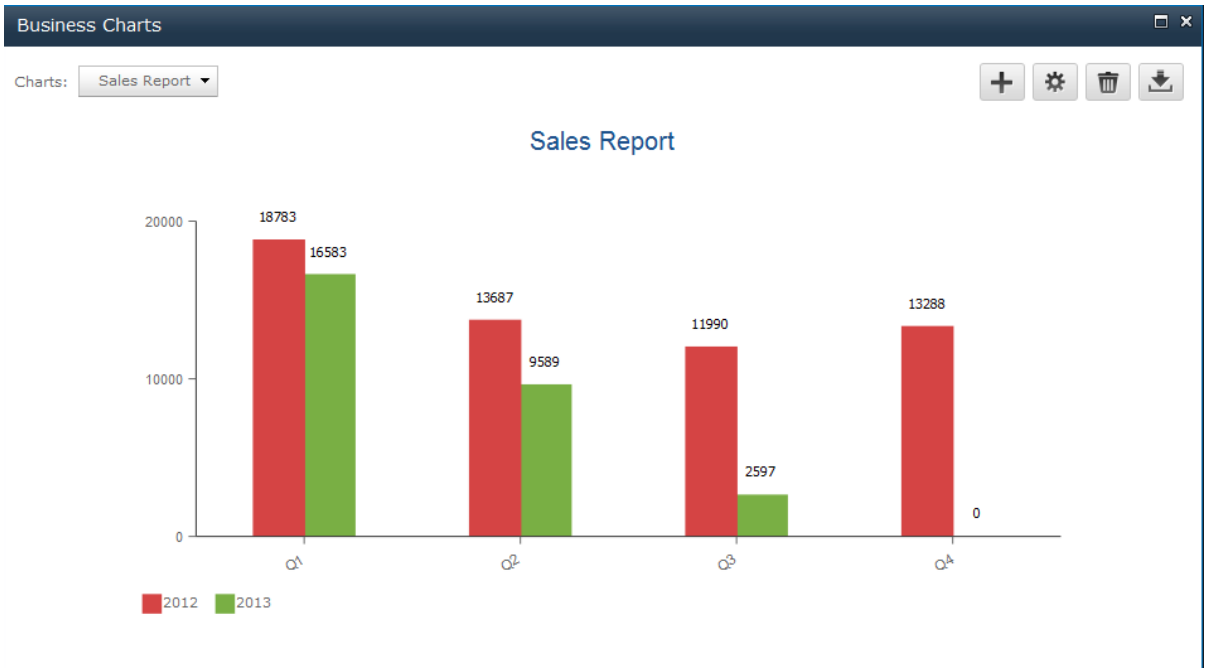


Note End users who have **View Only** permission level for the site page can view charts that they created in the web part.

3.2 Business Charts Dialog

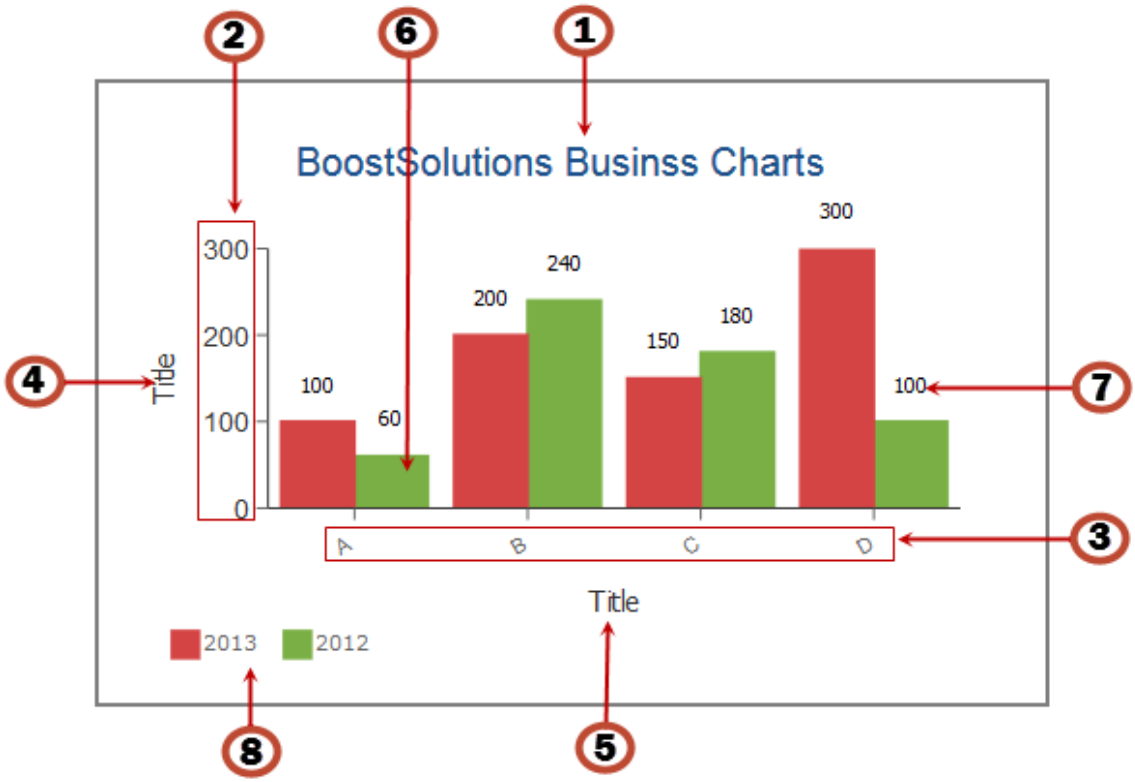
Business Charts gives you a flexible way to analyze business data directly in a list and you can view charts for the current list with a simple click on the Ribbon.





3.3 Chart Elements

Business Charts is composed of various elements such as Chart Name, Title, Axis, etc. The following image shows the common chart elements:



① Chart title.

② Value (Y) Axis: Associated with the values you selected in the Value (Y) Axis section.

③ Category (X) Axis: Associated with the values you selected in the Category (X) Axis section.

④ Value (Y) Axis Title: A short description of the Value (Y) Axis.

⑤ Category (X) Axis Title: A short description of the Category (X) Axis.

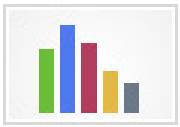
⑥ Chart Series: Visual representation of the individual values of a chart.

⑦ Label: Alpha-numeric representation of data values.

⑧ Legend: Icons with the data series names and colors.

3.4 Chart Types

Business Charts provides 5 types of charts (Column, Area, Line, Bar and Pie). You can easily change chart types from one type to another.

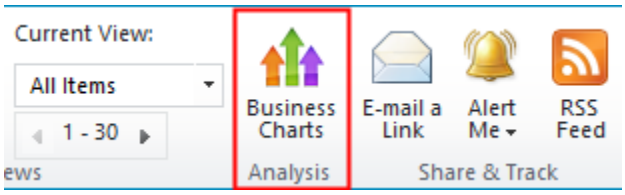
Chart Type	Description
Bar chart	A Bar Chart displays a sequence of vertical or horizontal bars of lengths proportional to the value that they represent. Bar charts are usually used for comparing two or more values or representing the contribution of each value to a total.
Line chart	Line charts are usually used to show a trend or how a value contributes to a trend total (stacks).
Area chart	Area charts are usually used for comparing two or more values or representing the contribution of each value to a total.
Pie chart	A Pie Chart is a circular chart divided into sectors, where the arc length of each sector is proportional to the quantity it represents. Group by is not supported by pie charts.
Column chart 	A Column Chart is usually used for comparing two or more values or representing the contribution of each value to a total. The column chart is the default chart used in Business Charts.

4. Create a Chart

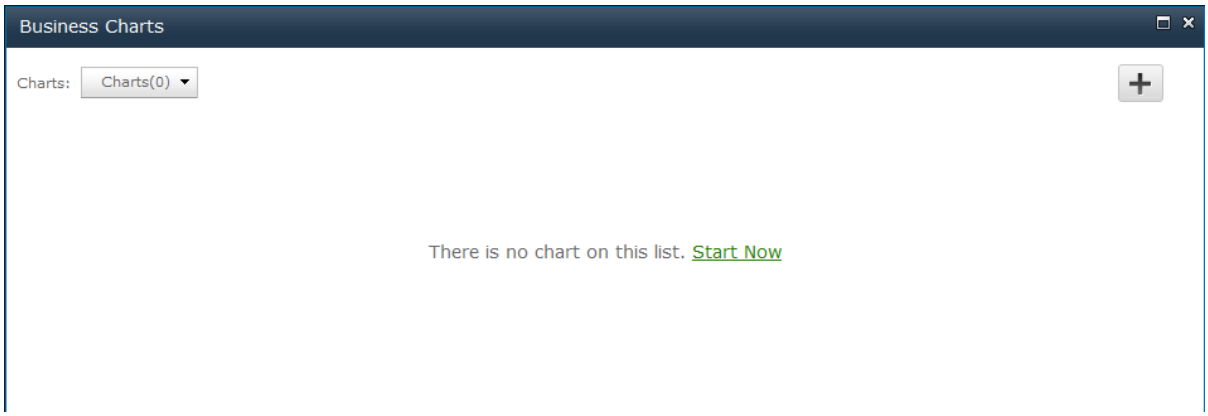
4.1 Create a Chart in List

Business Charts allows end users to create chart directly on list without adding any Web Parts. To complete this task and to view the chart you must have at least **Design** permission level in the current list.

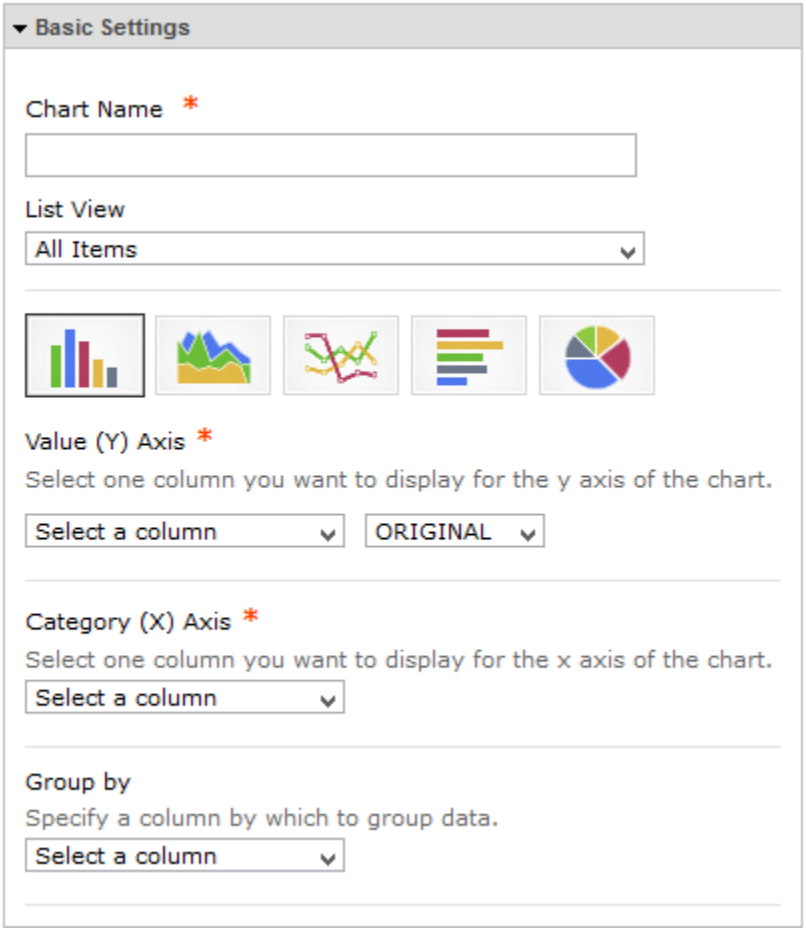
a. Enter the list which you want to create a chart for and click **Business Charts** under the **List** tab.



b. If you use the product for the first time, a message may appear indicating that there is no chart on this list. Click **Start Now** or click on the right top corner to create your first chart.



c. On the **Basic Settings** panel, you need to configure the Chart Name, List View, Chart Type, Value (Y) Axis, Category (X) Axis and Group by (optional) options.

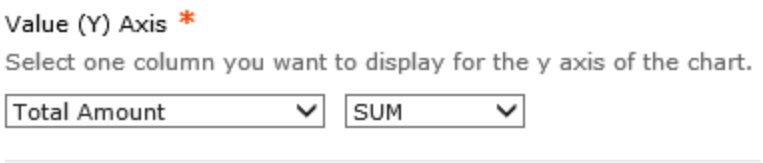


d. In the **Chart Name** section, specify a name. This option is required.

e. In the **List View** section, you can select one view to decide the data range you want to use to generate a chart. Personal view is not supported.

f. Select one chart type according to your needs or business goals. There are 5 types of chart you can choose from: Column, Area, Line, Bar and Pie chart.

g. In the **Value (Y) Axis** section, you can select a column or field to display on the y axis.



The drop-down only lists the columns contained in the selected view.

Supported columns: Single Line of Text, Yes/No, Choice, Number, Currency, Date and Time, Person or Group, Lookup, Cascaded Lookup, Cross-Site Lookup.

h. In the **Value (Y) Axis** section, specify one function you want to apply to the values on the Y axis. To show the value of the column, select **ORIGINAL**.

SUM	Gets the total of all the values in the column.
AVERAGE	Calculate the average for the values in the column.
COUNT	Get the count of the records for a particular category.
MIN	Gets the smallest numeric value in the column.
MAX	Gets the largest numeric value in the column.

i. In the **Category (X) Axis** section, select a column or field to display on the X axis.

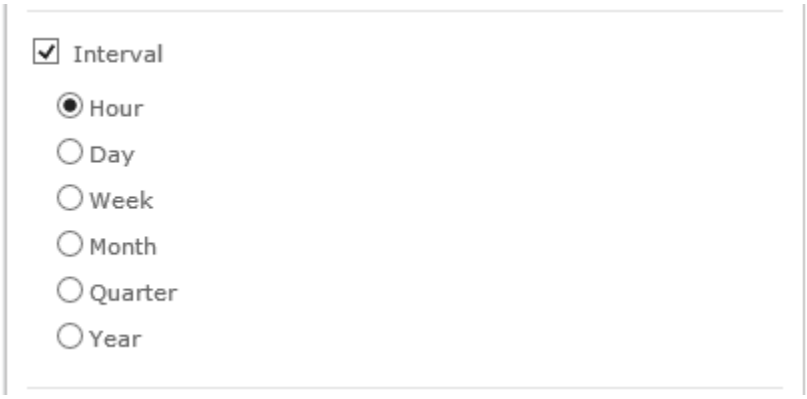
Supported columns: Single Line of Text, Yes/No, Choice, Number, Currency, Date and Time, Person or Group, Lookup, Cascaded Lookup, Cross-Site Lookup.

Interval

If you specify the Data and Time field as the Category (X) Axis, you can optionally specify the date or time interval to display on the chart.

For this option you will need to select one function in the **Value (Y) Axis** section.

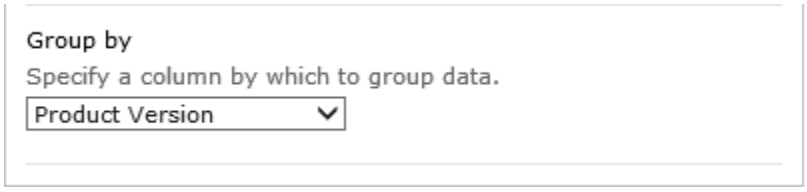
You can show the data by Hour, Day, Week, Month, Quarter or Year.



j. In the **Group By** section, specify a column by which to group data.

You can optionally summarize data values in groups using the Group by option. For example, if you want to compare the sales numbers for three products by month or by quarter then this is the best function to use.

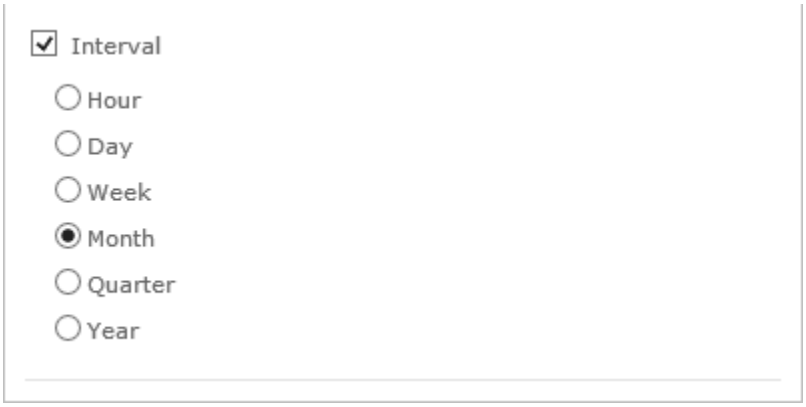
Please note, if you want to use the Group by function, you must select a function (SUM, COUNT, MAX, MIN, AVG) in the **Value (Y) Axis** section.



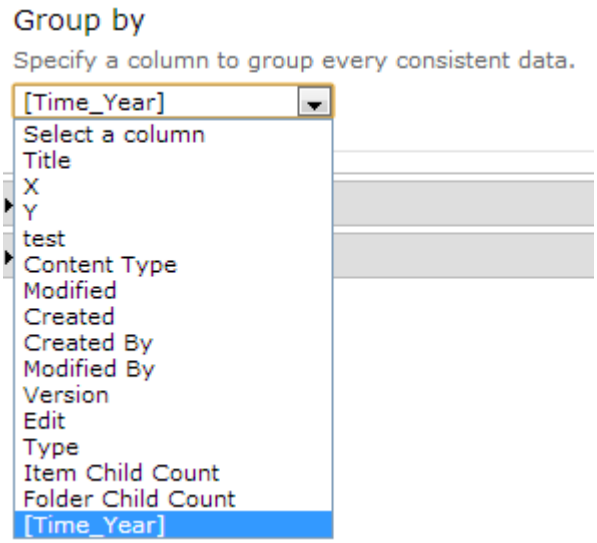
Supported columns: Single Line of Text, Yes/No, Choice, Number, Currency, Date and Time, Person or Group, Lookup, Cascaded Lookup, Cross-Site Lookup.

Interval

Once you select a Date and Time column in the **Group by** section, you can optionally group the data to a specified interval.



***Note*:** If you select a Date and Time column in the **Category (X) Axis** section and select **Month** or **Quarter** in the **Interval** section, a **[<Date and Time Column Name>_Year]** option will appear in the **Group by** dropdown list.



This column helps to compare your business data within the same month or quarter for all previous years.

To understand how to use this column to anaylze your business data, please refer to section *10. Use Case* for details.

k. Click the **Save Settings** button to save the configurations.

l. Click the **Close Settings** button to close the setting panel.

4.2 Create Charts using the Business Charts Web Part

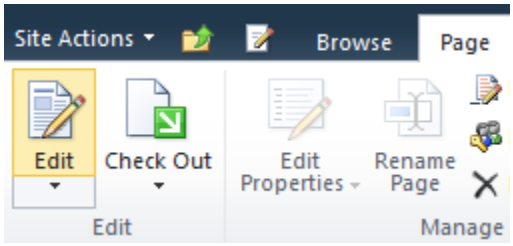
When you create charts using the Business Charts Web Part, you need to first add the Business Charts Web Part on your page and connect it to a data source. Then you can change the appearance of the chart.

Business Charts supports multiple popular external data systems as the data sources such as, Microsoft SQL Server 2000-2008 R2, Oracle Database and SharePoint 2010/2013.

4.2.1 Add a Business Charts Web Part

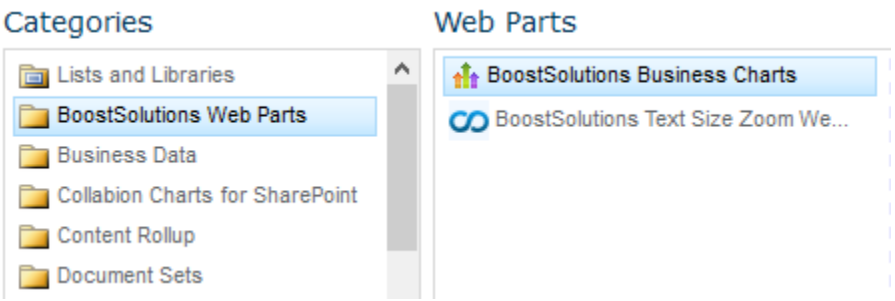
To add a Business Charts Web Part, you must have at least **Design** permission level.

a. From any page, click the **Page** tab on the ribbon and then click the **Edit** command.



b. Click on the page where you want to add the Web Part to and click the **Insert** tab followed by **Web Part**.

c. Under Categories, select **BoostSolutions Web Parts** category. Next select Business Charts under the Web Parts section and click **Add**.

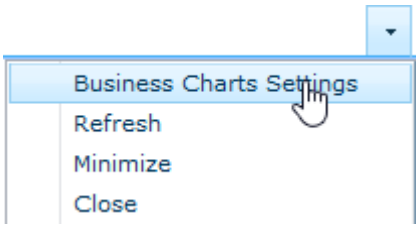


d. Then click **Save & Close** to save the page.

4.2.2 Connect to a Data Source

After the Business Charts Web Part is added on page, you can connect it to the specified data source.

a. Hover over the Business Charts Web Part to reveal the blue arrow on the top right corner of the web part. Click on the arrow to open a drop down menu and click on **Business Charts Settings**.

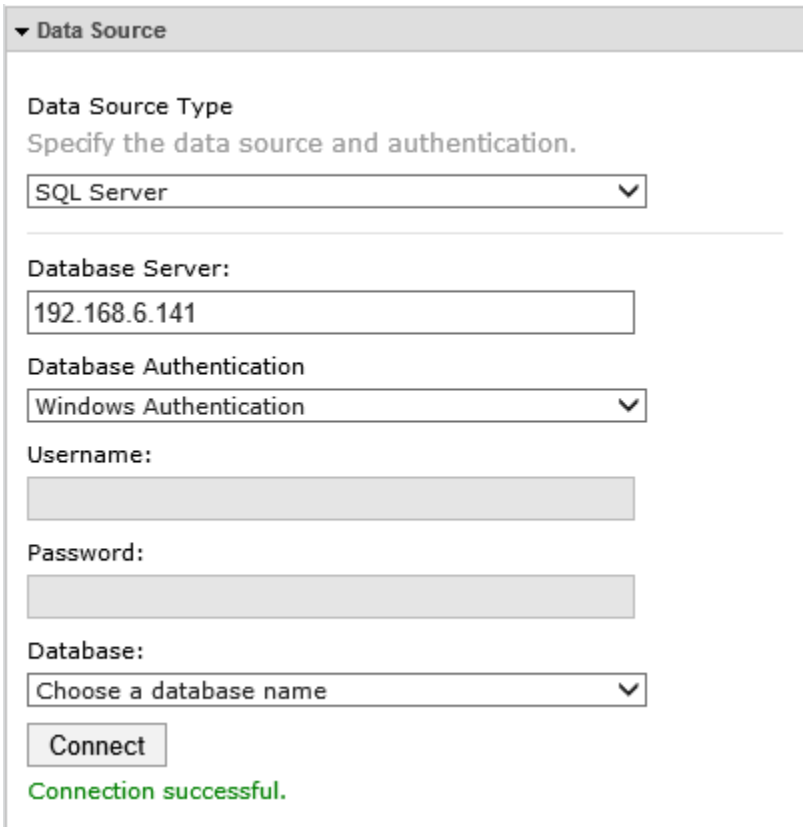


b. In the **Business Charts Settings** page, expand the **Data Source** panel.

c. In the **Data Source Type** section, select a data source type and configure the authentication.

Option	Description
SQL Server	Use this option to connect the web part to a SQL server database. Please see Connect to SQL Server.
ORACLE	Use this option to connect the web part to a oracle database. Please see Connect to ORACLE.
SharePoint 2010	Use this option to connect the web part to a SharePoint 2010 list, including the same site collection or other site collections. Please see Connect to SharePoint List.
SharePoint 2013	Use this option to connect the web part to a SharePoint 2010 list, including the same site collection or other site collections. Please see Connect to SharePoint List.

Connect to a SQL Server



a. **Data Source Type**: Select a SQL Server as the external data type.

b. **Database Server**: Enter the database server name or IP address.

c. **Database Authentication**: There are two types of authentication, Windows Authentication and SQL Server Authenticaiton.

   Windows Authentication: Use the application pool account to access the database server.

   To connect to a SQL Server using Windows authentication, you must identify the Windows identity under which your web application is running. You must also be sure that the identity has been granted access to the SQL Server database.

   SQL Server Authentication: If you select this authentication, you need to enter a SQL user name and password to access the database.

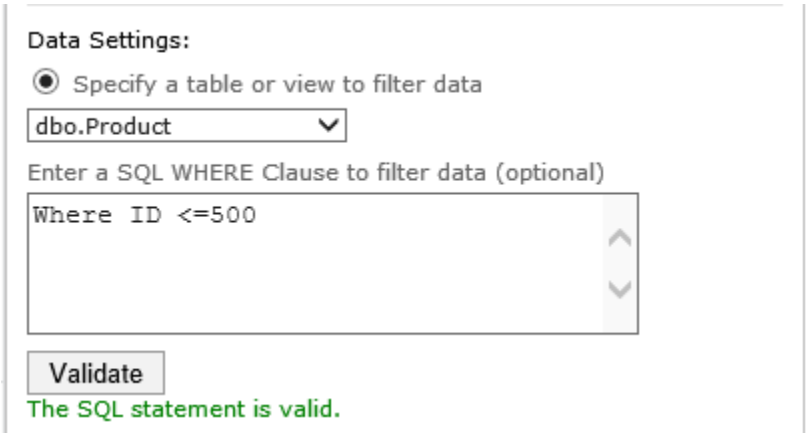
   To use this authentication, the Database Engine must use mixed mode authentication (**SQL Server and Windows Authentication mode**).

   - **Username**: Enter a SQL user name. The user should have at least **Read** permission.
   - **Password**: Enter the password.
   - Click **Connect** button to connect to the database and populate the database dropdown list.
   - **Database**: Select a database.

d. **Data Settings**: Specify the data which you want to display on the chart.

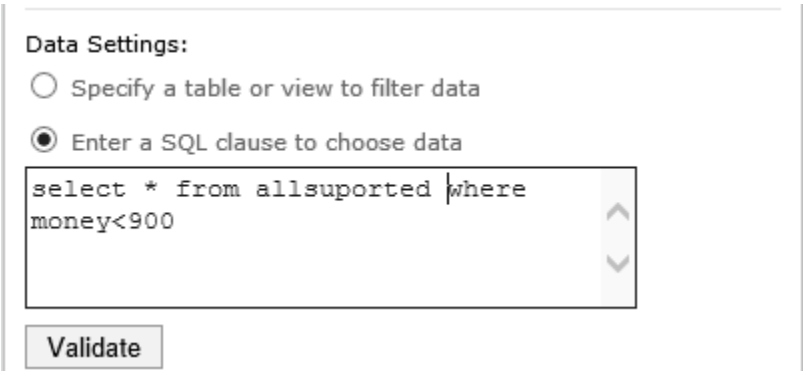
- **Specify a Table/View and filter**

Specify a table or view to use as a filter or optionally enter a SQL WHERE clause to filter records that fulfill a specified criterion from a database table or view.



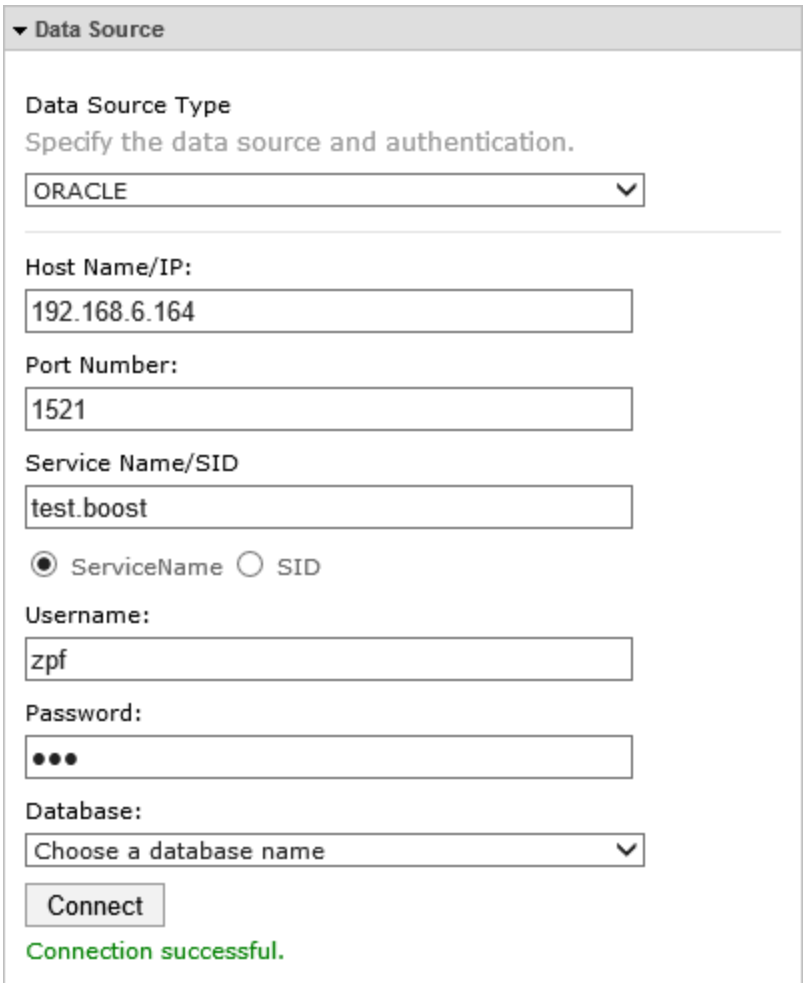
- **Enter a SQL Clause to choose data**

Enter a SQL clause to filter data from the database you selected and then click **Validate** to check the statement.



Connect to ORACLE

To connect to ORACLE, you must install the ORACLE client in SharePoint server.



a. **Data Source Type**: Select Oracle as the external data type.

b. **Host Name/IP**: Enter a host name where the database is situated or the IP address of the server.

c. **Port Number**: Enter the TCP/IP port number to connect to the database server (The default port number is 1521).

d. **Service Name/SID**: Enter the Service Name/SID for the connection and select the corresponding radio button.

e. **User Name**: Enter the user name. Ensure the user has at least **Read** permission to the database.

f. **Password**: Enter the passowrd.

g. Click **Connect** button to connect to the database and populate the database dropdown list.

h. **Database**: Select a database.

i. **Data Settings**: Specify the data which you want to display on the chart.

- **Specify a Table/View and filter**

  Specify a table or view to use as a filter or optionally enter a SQL WHERE clause to filter records that fulfill a specified criterion from a database table or view.

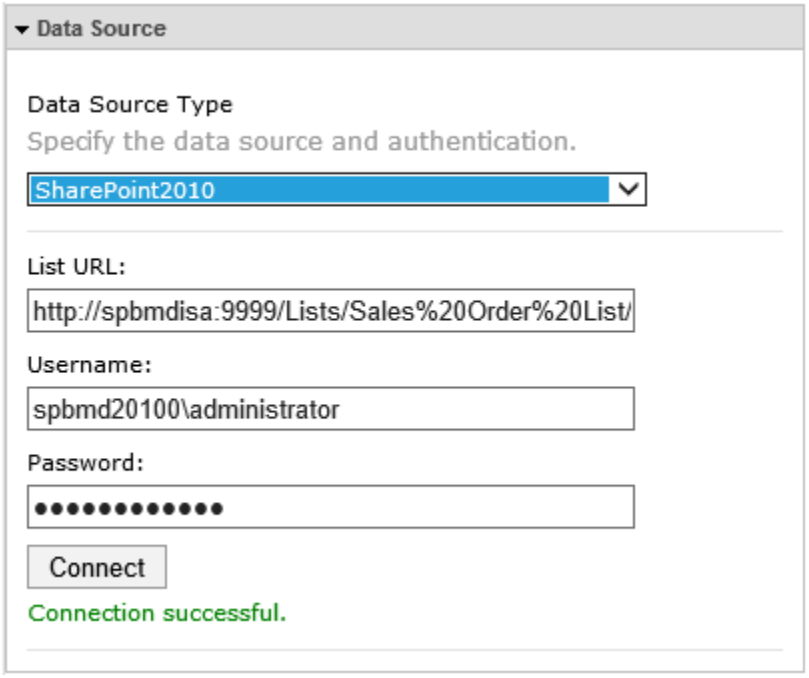
- **Enter a SQL Clause to choose data**

  Enter a SQL clause to filter data from the database you selected and then click **Validate** to check the statement.

Connect to a SharePoint List

The configuration for SharePoint 2010 and 2013 are the same. We will use SharePiont 2010 as an example in this section.

You can enter a URL for the list from another farm and corresponding User Name and Password.



a. **External Data Type**: Select SharePoint 2010 as the external data type.

b. **URL**: Enter a SharePoint list URL.

c. **User Name**: Enter a user name for a SharePoint2010 user. Ensure the user has at least **View only** permission for the target SharePoint list.

d. **Password**: Enter the password.

e. Click **Connect** button.

4.2.3 Create a Chart in the Web Part

Once you connect to a data source and select the data, you can create a chart in the web part.

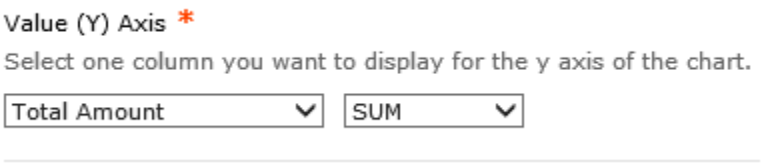
To create a chart, you need to configure the following: Chart Name, Chart Type, Value (Y) Axis, Category (X) Axis and Group by (optional).

a. In the **Business Charts Settings** page, expand the **Basic Settings** panel.

b. In the **Chart Name** section, specify a name. This option is required.

c. Select one chart type according to your needs or business goals. There are 5 types of chart you can choose from: Column, Area, Line, Bar and Pie chart.

d. In the **Value (Y) Axis** section, you can select a column or field to display on the y axis.



e. In the **Value (Y) Axis** section, specify one function you want to apply to the values on the Y axis. To show the value of column, select ORIGINAL.

SUM	Gets the total of all the values in the column.
AVERAGE	Calculate the average for the values in the column.
COUNT	Get the count of the records for a particular category.
MIN	Gets the smallest numeric value in the column.
MAX	Gets the largest numeric value in the column.

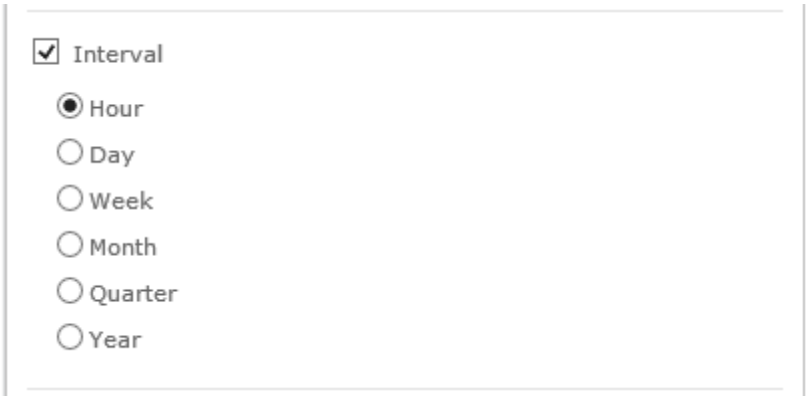
f. In the **Category (X) Axis** section, select a column or field to display on the X axis.

Interval

If you specify the Date and Time field as the Category (X) Axis, you can optionally specify the date or time interval to display on the chart.

For this option you will need to select one function in the **Value (Y) Axis** section.

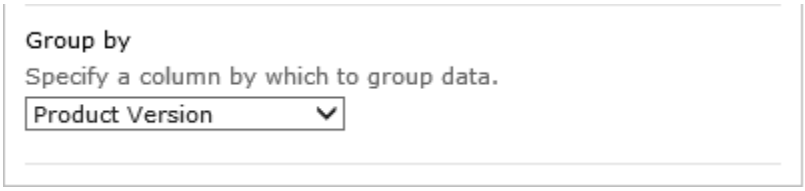
You can show the data by Hour, Day, Week, Month, Quarter or Year.



g. In the **Group By** section, specify a column by which to group data.

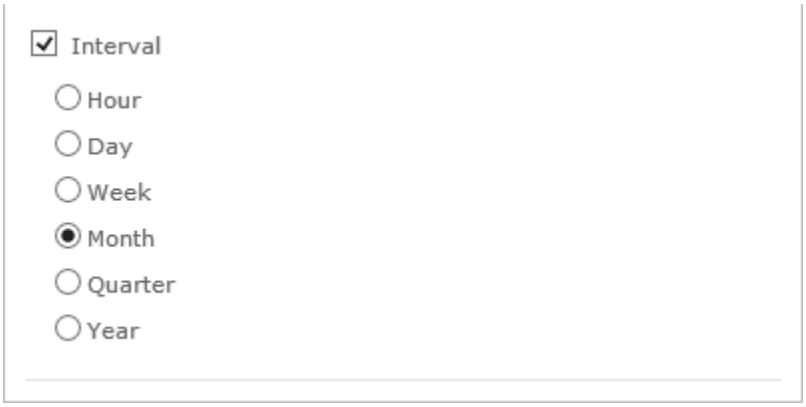
You can optionally summarize data values in groups using the Group by option. For example, if you want to compare the sales numbers for three products by month or by quarter then this is the best function to use.

Please note, if you want to use the Group By function, you must select a function (SUM, COUNT, MAX, MIN, AVG) in the **Value (Y) Axis** section.

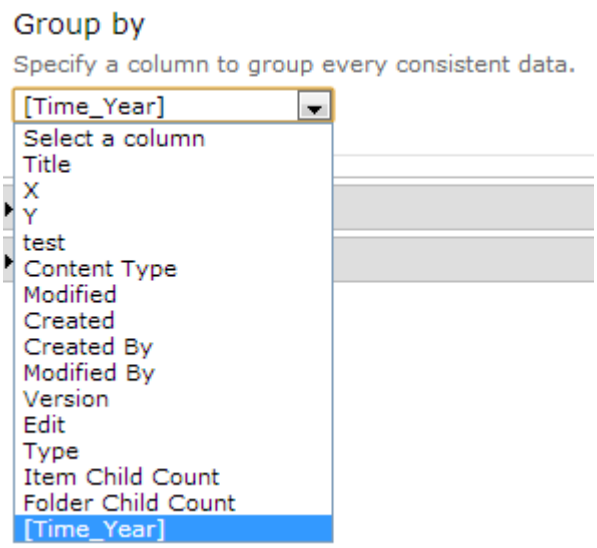


Interval

Once you select a Date and Time column in the **Group by** section, you can optionally group the data to a specified interval.



***Note*:** If you select a Date and Time column in the **Category (X) Axis** section and select **Month** or **Quarter** in the **Interval** section, a **[<Date and Time Column Name>_Year]** option will appear in the Group by dropdown list.



This column helps to compare your business data within the same month or quarter for all previous years.

To understand how to use this column to anaylze your business data, please refer to section *10. Use Case* for details.

h. Click the **Save Settings** button to save the configurations.

i. Click the **Close Settings** button to close the settings panel,

5. Modify or Delete a Chart

This section will show you how to modify or delete a chart in Business Charts Web Part or list.

5.1 Modify a Chart

To modify a chart, you must have at least **Design** permission level.

To modify a chart in list

a. Enter the list which you want to modify a chart and click **Business Charts** under the List tab.

b. Select the chart you want to change and click the button on the top right corner.

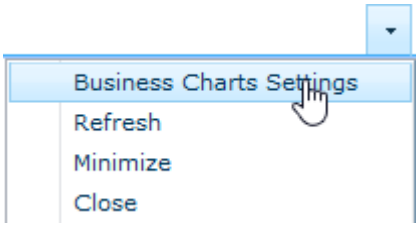
c. Make the changes as you want.

d. Click **Save Settings** to save changes.

e. Click **Close Settings** to close the settings panel.

To modify a chart on the Web Part

a. Hover over the Business Charts Web Part to reveal the blue arrow on the top right corner of the web part. Click on the arrow to open a drop down menu and click on **Business Charts Settings**.



b. In the **Business Charts Settings** page, select the chart you want to modify.

c. Make the changes as you want.

d. Click **Save Settings** to save changes.

e. Click **Close Settings** to return to the Web Part page.

5.2 Delete a Chart

To delete a chart you must have at least **Design** permission level.

To delete a chart in list

a. Enter the list which you want to modify a chart and click **Business Charts** under List tab.

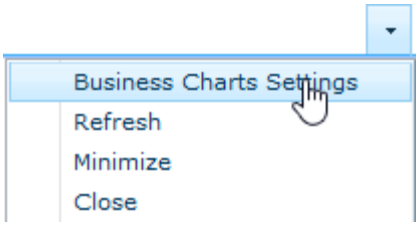
b. Select the chart you want to delete and click the button on the top right corner.

c. A message box will appear asking if you are sure you want to delete the chart.

d. Click **OK** to confirm the deletion.

To delete a chart on the Web Part

a. Hover over the Business Charts Web Part to reveal the blue arrow on the top right corner of the web part. Click the arrow to open a drop down menu and click on **Business Charts Settings**.



b. In the **Business Charts Settings** page, select the chart you want to delete.

c. Click the button on the top right corner.

d. A message box will appear asking if you are sure you want to delete the chart.

e. Click **OK** to confirm the deletion.

6. Filter Data to Display on Chart

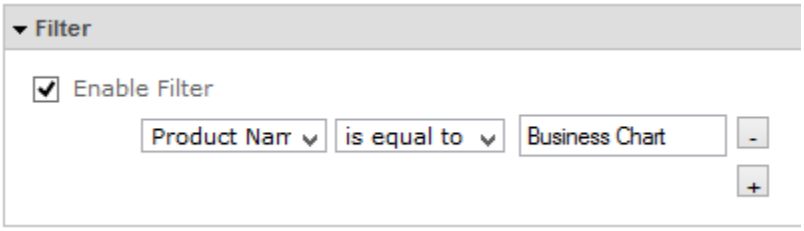
This function allows you to specify criterias to filter data to display on the chart. With this function, you can narrow your data selection.

For Business Charts Web Part, this function is only available when the data source is SharePoint list.

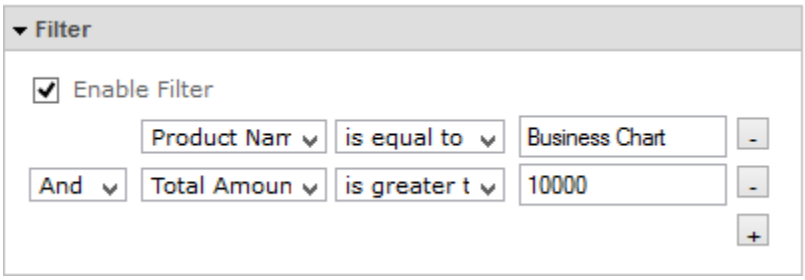
a. In the **Business Charts Settings** page, expand the **Filter** section.

b. Select the checkbox next to **Enable Filter** to enable this function.

c. Select one column or field and operator and then specify a value to compare.



d. To add more filters, click + to add a filter (click - to delete a filter).



e. Click the **Save Settings** button to save the configurations.

Supported columns and operators:

Operator	Description	Note
Equal to	Column value is equal to the specified value. **Columns:** Date and Time, Number, Currency, Single line of text, Hyperlink or Picture, Managed Metadata, Person or Group, Content Type, Yes/No, Attachment, Calculated, Lookup, Cascaded Lookup, Cross-Site Lookup	For Yes/No and Attachment columns, the value should be True or False.

Not equal to	Column value does not equal to the specified value. **Columns:** Date and Time, Number, Currency, single line of text, Hyperlink or Picture, Managed Metadata, Person or Group, Content Type, Calculated, Lookup, Cascaded Lookup, Cross-Site Lookup
Begins with	Begins with a specified character. **Columns:** Single line of text, Hyperlink or Picture, Managed Metadata, Person or Group, Content Type, Calculated, Lookup, Cascaded Lookup, Cross-Site Lookup
Contains	Contains specific characters anywhere in the text. **Columns:** Single line of text, Hyperlink or Picture, Managed Metadata, Person or Group, Content Type, Multiple line of text, Calculated, Lookup, Cascaded Lookup, Cross-Site Lookup
Less than	Column value is less than a specified value. **Columns:** Calculated, Date and Time, Number, Currency, Calculated, Lookup, Cascaded Lookup, Cross-Site Lookup
Greater than	Column value is greater than a specified value. **Columns:** Calculated, Date and Time, Number, Currency, Calculated, Lookup, Cascaded Lookup, Cross-Site Lookup

7. Change Appearance

After a chart is created, you can change the axis title, label and add animation effects.

a. Open the **Business Charts Settings** panel and expand the **Appearance** section.

b. In the **Value (Y) Axis Title** section, specify a short title to display on the x axis of the chart.

c. In the **Category (X) Axis Title** section, specify a short title to display on the y axis of the chart.

d. Specify if you want to display labels on the chart and specify the number of decimal places in the label.

e. Specify if you want to enable animation effects while loading the chart.

f. Click the **Save Settings** button to save the configurations.

8. Miscellaneous

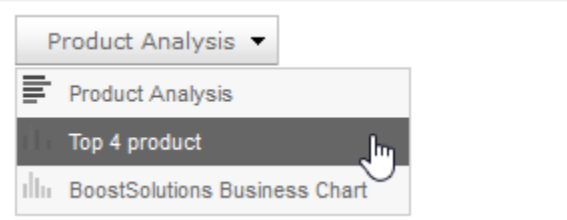
8.1 Default Chart

In Business Charts, you can create multiple charts based on your need. There is not option to specify the default chart to display.

Business Charts will consider the chart which was last modified as the default.

8.2 View Charts

Business Charts allows you to create multiple charts to meet your needs or business requirements. To view another chart, select the chart name in the **Charts** drop-down list.



8.3 Export Data to a CSV file

After a chart has been created, you can export the data to a CSV file.

X	Y	Time
A	100	2013
B	200	2013
C	150	2013
D	300	2013
A	60	2012
B	240	2012
C	180	2012
D	100	2012

a. Click the button on the right top corner of the page.

b. Specify the location to save the file to and click **OK**.

9. Use Case

You are a sales specialist and you record product orders to a SharePoint list. Your supervisor wants you to compare the sales data, by quarter, for 2012 and 2013.

Order ID	Product Name	Total Amount	Date Fulfilled	Region
ORD-232- A3E2	DocShare	$799.00	1/4/2012 12:00 AM	Europe
ORD-232- A3E3	DocShare	$1,099.00	1/7/2012 12:00 AM	North America
ORD-232- A3E4	DocMerger	$699.00	1/9/2012 12:00 AM	Asia
ORD-232- A3E5	DocViewer	$1,099.00	1/10/2012 12:00 AM	Europe
ORD-232- A3E6	DocMerger	$699.00	1/8/2012 12:00 AM	North America
ORD-232- A3E7	DocShare	$799.00	1/9/2012 12:00 AM	Asia
ORD-232- A3E8	DocShare	$799.00	1/10/2012 12:00 AM	Europe
ORD-232- A3E9	DocViewer	$1,899.00	2/11/2012 12:00 AM	North America
ORD-106- L4N0	DocShare	$799.00	2/12/2012 12:00 AM	Asia
ORD-106- L4N1	DocViewer	$1,899.00	2/13/2012 12:00 AM	Europe
ORD-106- L4N2	DocMerger	$699.00	2/14/2012 12:00 AM	North America

To create a chart that meets your requirement, follow these steps:

a. First enter the Sales Order List and click on **Business Charts** under the List tab.

b. In the Business Charts dialog, click the **Add a new chart** button.

c. In the Basic Settings section, specify the following settings:

Chart Name: Specify a name for this chart.

List View: Select All Items to generate a chart.

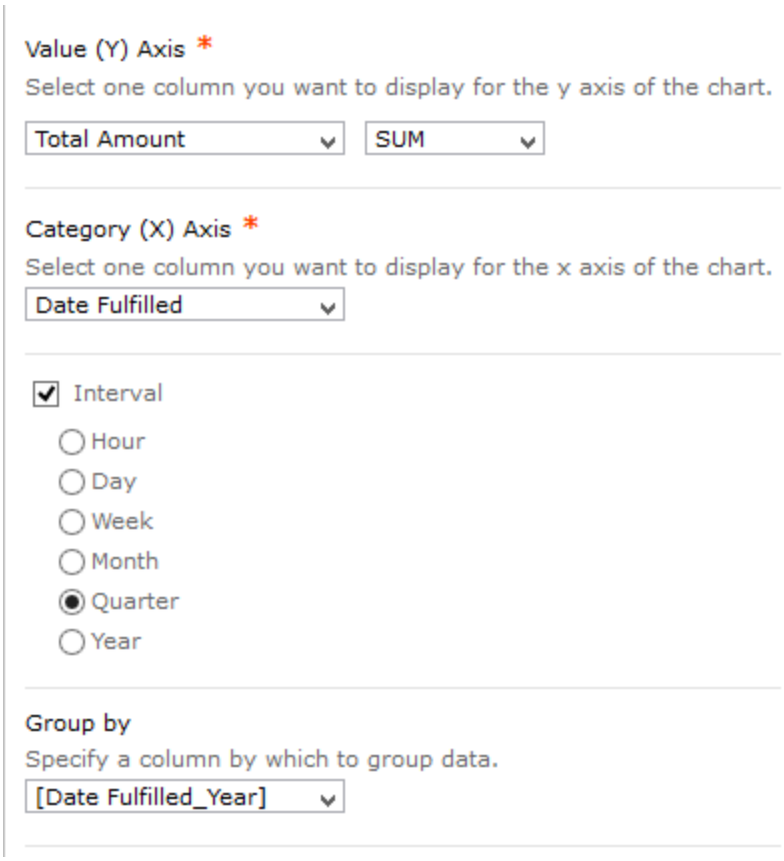
Chart Type: Select a column chart to display your data.

Value (Y) Axis: Select the Total Amount column and select the SUM function.

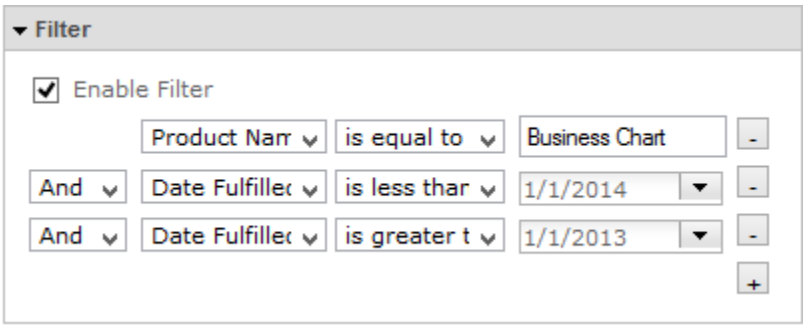
Category (X) Axis: Select the Date Fulfilled column to display on the x axis.

Interval: Specify the interval as Quarter.

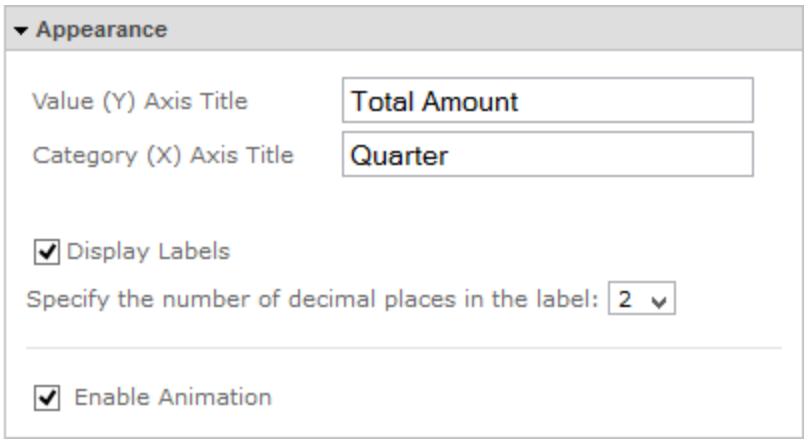
Group by: Select **[Date Fulfilled_Year]**.



d. In the Filter section, specify the criteria to filter data:



e. In the Appearance section, specify the title for the x and y axis as follows:



f. Click **Save Settings** to save the settings.

g. You will get a chart that looks like this:

10. Troubleshooting & Support

Troubleshooting FAQ:

http://www.boostsolutions.com/general-faq.html#Show=ChildTitle9

Contact Info:

Product & Licensing Inquires: sales@boostsolutions.com

Technical Support (Basic): support@boostsolutions.com

Request a New Product or Feature: feature_request@boostsolutions.com

Live chat:

http://www.boostsolutions.com/support/chat/livezilla.php?intgroup=U3VwcG9ydA==&reset=true

Appendix 1: License Management

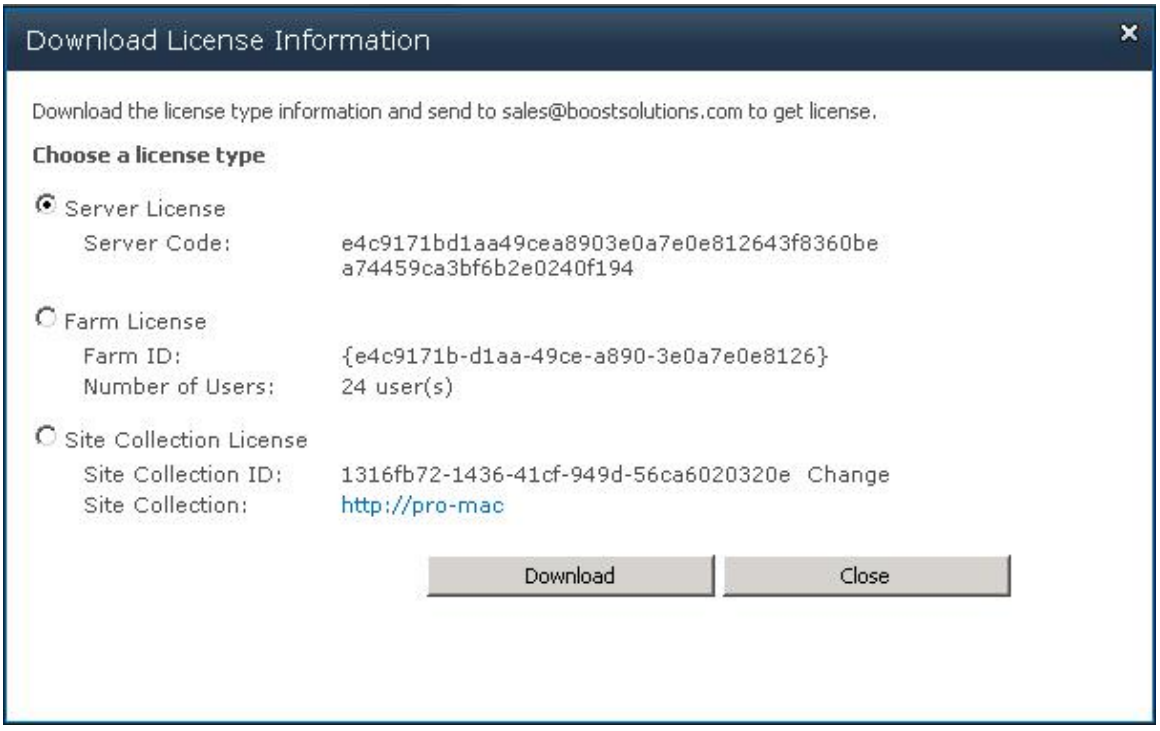
You can use Business Charts without entering any license code for a period of 30 days from when you first use it.

To use the product without limitation after expiration, you will need to purchase a license and register the product.

Finding License Information

a. Navigate to the **BoostSolutions Software Management** section in Central Administration. Then, click **License Management Center** link.

b. Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).



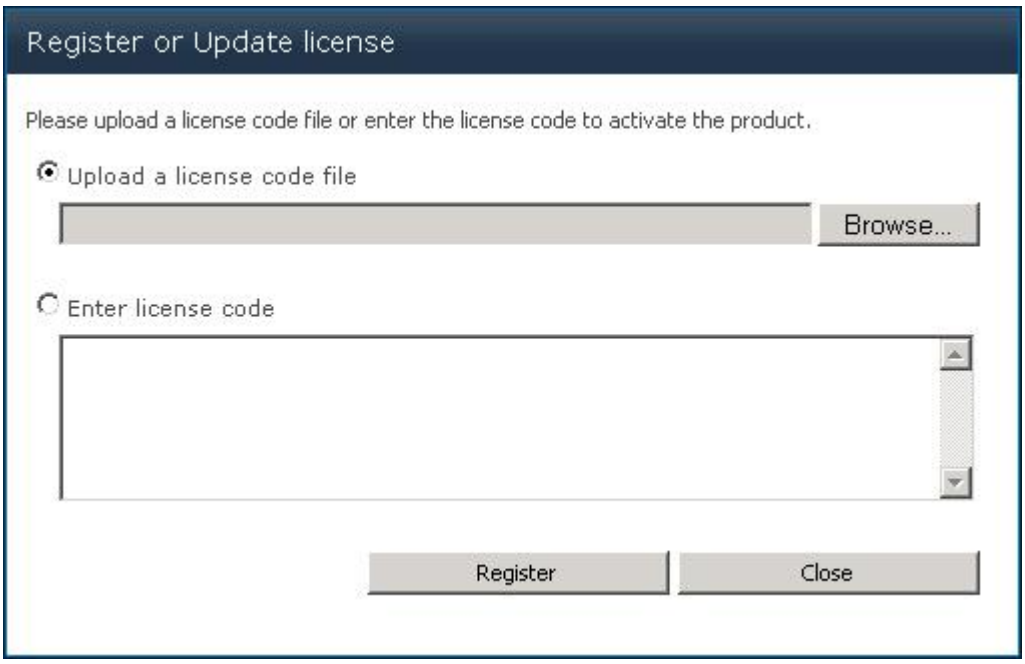
In order for BoostSolutions to create a license for you, you MUST send us your SharePoint environment identifier (Note: different license types need different information). A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection ID.

c. Send the above information to us (sales@boostsolutions.com) to generate a license code.

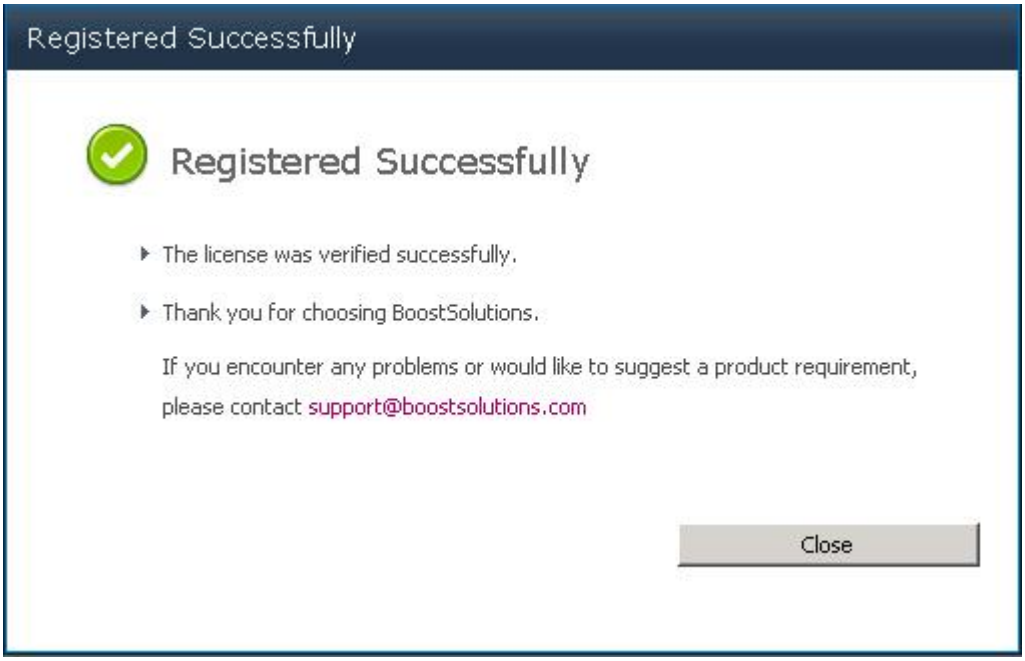
License Registration

a. When you receive a product license code, enter the **License Management Center** page.

b. Click **Register** on the license page and a **Register or Update license** window will open.



c. Upload the license file or enter the license code and click **Register**. You will get confirmation that your license has been validated.



For more details on license management, see the BoostSolutions Foundation.