



Choice Indicator 1.0

User Guide

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

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1. Product Introduction

SharePoint Choice Indicator allows you to prioritize, organize and monitor list items by applying color-coded labels corresponding to selection criteria you specify. It is a very useful and easy to use tool to help you classify list elements.

This user guide will assist you to install and configure Choice Indicator on your SharePoint environment.

For latest version of this user guide or other user guides, please visit:

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

2. Installation

2.1 Product Files

After you download and unzip the Choice Indicator 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.
Choice Indicator _V1_User Guide.pdf	User guide for Choice Indicator 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.
Library\6.0\Setup.exe	The product installer for .Net Framework 4.6.
Library\6.0\Setup.exe.config	A file containing the configuration information for the installer.
Solutions\Foundation\BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundation\BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundation\BoostSolutions.FoundationSetup16.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2016.
Solutions\Foundation\Install.config	A file containing the configuration information for the installer.

Solutions\ChoicePro\BoostSolutions.ChoiceIndicatorSetup14.1.wsp	A SharePoint solution package containing Choice Indicator files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\ChoicePro\BoostSolutions.ChoiceIndicatorSetup15.1.wsp	A SharePoint solution package containing Choice Indicator files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\ChoicePro\BoostSolutions.ChoiceIndicatorSetup16.1.wsp	A SharePoint solution package containing Choice Indicator files and resources for SharePoint 2016.
Solutions\ChoicePro\ Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

Before you install Choice Indicator, ensure your system meets the following requirements:

SharePoint 2016

Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64
Server	Microsoft SharePoint Server 2016 Microsoft .NET Framework 4.6
Browser	Microsoft Internet Explorer 8 or above Mozilla Firefox Google Chrome

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

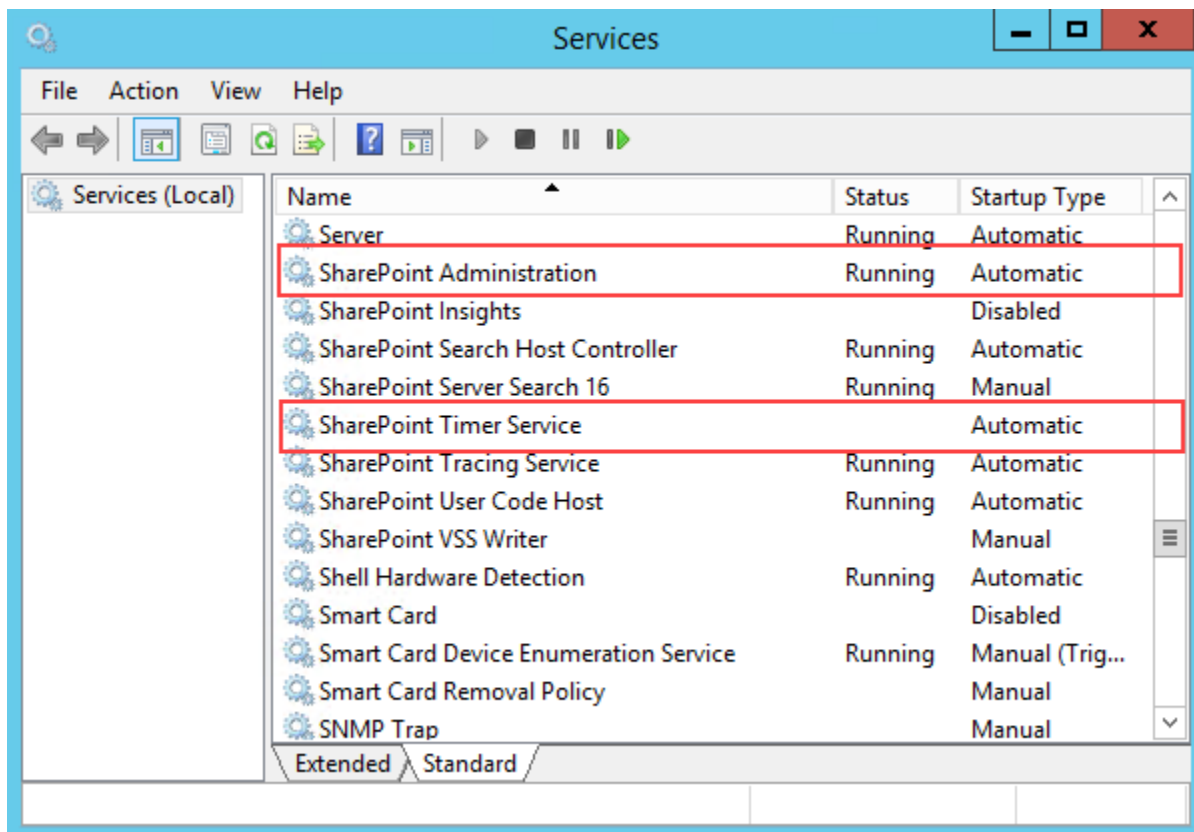
Operating System	Microsoft Windows Server 2008 x64 Microsoft Windows Server 2008 R2
Server	Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010 Microsoft .NET Framework 3.5
Browser	Microsoft Internet Explorer 7 or greater Mozilla Firefox

2.3 Installation

Follow these steps to install Choice Indicator 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 Service**.



Choice Indicator 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 Choice Indicator 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 your 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 Choice Indicator in SharePoint 2016 by 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 Choice Indicator to SharePoint servers.

- 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 2016**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\16\BIN

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

```
stsadm -o addsolution -filename BoostSolutions.ChoiceIndicatorSetup16.1.wsp
stsadm -o addsolution -filename BoostSolutions.FoundationSetup16.1.wsp
```

- d. Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions.ChoiceIndicatorSetup16.1.wsp -
allowgacdeployment -url [virtual server url] -immediate

stsadm -o deploysolution -name BoostSolutions.FoundationSetup16.1.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.ChoiceIndicatorSetup16.1.wsp
stsadm -o displaysolution -name BoostSolutions.FoundationSetup16.1.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 Brandysoft.SharePoint.ChoicePro -url [site collection url] -force
stsadm -o activatefeature -name
Brandysoft.SharePoint.ChoicePro_Brandysoft.SharePoint.ChoicePro.HideTypeDefinition -url [site
collection url] -force
```

To remove Choice Indicator from SharePoint servers.

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.ChoiceIndicatorSetup16.1.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.ChoiceIndicatorSetup16.1.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.ChoiceIndicatorSetup16.1.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 you 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.FoundationSetup16.1.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.FoundationSetup16.1.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.FoundationSetup16.1.wsp
```

2.7 Feature Activation

Activate Choice Indicator's feature 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. Click **Settings**  and then click **Site Settings**.
- b. Under the **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**.



BoostSolutions Choice Indicator 1.6.1023.1

Showing your choices as color indicators. (Powered by BoostSolutions)

Deactivate

Active

3. How to Use Choice Indicator

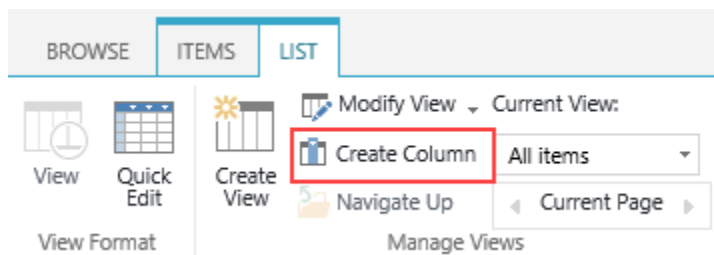
After you install Choice Indicator on your SharePoint Server, a **Choice Indicator** column type will be available in the **Create Column** page. To access the Choice Indicator feature, you must have at least Design permission level.

- External Data
- Task Outcome
- Choice Indicator (showing your choices as color indicators)
- Managed Metadata

3.1 Create a Choice Indicator Column

Follow these steps to create a Choice Indicator Column:

- a. Enter the list or library that you want to create a Choice Indicator column for.
- b. On the Ribbon, click the **List** or **Library** tab and then click **Create Column** in the Manage View group.



- c. The **Create Column** dialog box will open; in the **Name and Type** section enter a name for your Choice Indicator column.
- d. Under **The type of information in this column is**, select **Choice Indicator**.

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
- Choice Indicator (showing your choices as color indicators)
- Managed Metadata

- e. In the **Additional Column Settings section**, you should enter the desired choices and assign colors for each of them.

Please see the following example: **Not Started**, **In Progress**, **Completed**, and **Deferred** are entered as choices; in the Indicator Settings part, **Dark Orchid** represents **Not Started**, **Aquamarine** represents **In Progress**, **Chocolate** represents **Completed** and **Forest Green** represents **Deferred**.

Type each choice on a separate line:

Not Started
In Progress
Completed
Deferred

Indicator Setting:

Choice	Color Number	Color
Not Started	<input type="text" value="0x9932CC"/>	<input type="text" value="DarkOrchid"/>
In Progress	<input type="text" value="0x7FFFD4"/>	<input type="text" value="Aquamarine"/>
Completed	<input type="text" value="0xD2691E"/>	<input type="text" value="Chocolate"/>
Deferred	<input type="text" value="0x228B22"/>	<input type="text" value="ForestGreen"/>


Display choices using:


- Drop-Down Menu
 Radio Buttons
 Checkboxes (allow multiple selections)

- f. Configure the other settings in the Additional Column Settings section and click **OK** to save the column.
- g. You will return to the list view page, create a new item and select a status for the Choice Indicator column.

Project Task


Task Name *

Start Date 

Due Date 

Assigned To

% Complete %

Priority 

Status Not Started
 In Progress
 Completed
 Deferred

- h. Save the item, and Choice Indicator will appear in the list as a colored square corresponding to the criteria you specified on the indicator settings list. When you hover over the color indicator, the choice value will be displayed.

[All Tasks](#) [Calendar](#) [Completed](#) [...](#)

✓	Task Name	Priority	Status	Start Date	Due Date
	Tech Discussion ✱	...	(1) High		Tuesday Tuesday

Project Task









Task Name	Tech Discussion
Start Date	10/17/2017
Due Date	10/17/2017
Assigned To	
% Complete	0 %
Priority	(1) High
Status	Not Started

- i. After creating several items, you will see the status of each item is displayed clearly.

Project Task

[+ new task](#) or [edit](#) this list

[All Tasks](#) [Calendar](#) [Completed](#) [...](#)

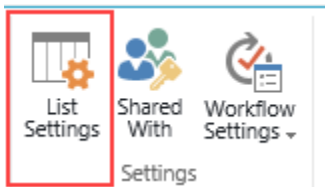
✓	Task Name	Priority	Status	Start Date	Due Date
	Tech Discussion 	... (1) High		10/17/2017	10/17/2017
	DocViewer Release 	... (2) Normal		10/18/2017	10/18/2017
	Website test 	... (1) High		10/16/2017	10/16/2017
	Team training 	... (3) Low		10/2/2017	10/2/2017
	New product meeting 	... (2) Normal		10/5/2017	10/5/2017

Note Choice Indicator is not compatible with the Gantt View in SharePoint 2010.

3.2 Edit a Choice Indicator Column

You can change the settings for Choice Indicator column. But unlike SharePoint Choice column, you cannot change the column type.

- a. Enter the list or library that contains the Choice Indicator column you want to edit.
- b. On the Ribbon, click the **List** or **Library** tab and then click **List Settings** or **Library Settings** in the Settings group.



- c. On the **List Settings** or **Library Settings** page, under the **Column** section, click the name of the Choice Indicator column to enter the **Change Column** page.

Columns

A column stores information about each item in the list. Because this list allows multiple content types, some optional for a column, are now specified by the content type of the item. The following columns are currently available:

Column (click to edit)	Type	Used in
% Complete	Number	Task
Assigned To	Person or Group	Task
Completed	Calculated (calculation based on other columns)	
Created	Date and Time	
Due Date	Date and Time	Task
Modified	Date and Time	
Priority	Choice	Task
Start Date	Date and Time	Task
Status	Choice Indicator	Task
Task Name	Single line of text	Task
Created By	Person or Group	
Modified By	Person or Group	

- d. Make the changes and click **OK** to save the settings.

3.3 Delete a Choice Indicator Column

This procedure deletes the Choice Indicator column and any data in this column. You cannot restore the Choice Indicator column from the Recycle Bin once it has been deleted.

- Enter the list or library that contains the Choice Indicator column you want to delete.
- On the Ribbon, click the **List** or **Library** tab and then click **List Settings** or **Library Settings** in the Settings group.
- On the **List Settings** or **Library Settings** page, under the **Column** section, click the name of the Choice Indicator column to enter the **Change Column** page.

Columns

A column stores information about each item in the list. Because this list allows multiple content types, some optional for a column, are now specified by the content type of the item. The following columns are current.

Column (click to edit)	Type	Used in
% Complete	Number	Task
Assigned To	Person or Group	Task
Completed	Calculated (calculation based on other columns)	
Created	Date and Time	
Due Date	Date and Time	Task
Modified	Date and Time	
Priority	Choice	Task
Start Date	Date and Time	Task
Status	Choice Indicator	Task
Task Name	Single line of text	Task
Created By	Person or Group	
Modified By	Person or Group	

- Scroll to the bottom of the Change Column page and click **Delete**.
- When prompted, click **OK**.

3.4 Convert Column

This function allows you to convert columns between Choice Indicator and the SharePoint Choice column.

3.4.1 Convert to SharePoint Choice from Choice Indicator

This function helps you to convert a SharePoint Choice column to a Choice Indicator column.

- Open the **Create Column** page and select **Choice Indicator** in the **Name and type** section.
- In the **Additional Column Settings** section, click the **Convert to Choice Indicator from...** link.

Default value:

Choice Calculated Value

Enter Choice #1

Convert:

[Convert to Choice Indicator from...](#)

Add to all content types

- You will enter the **Convert to Choice Indicator** page. Select the Choice column in the dropdown list you want to convert.

Convert to Choice Indicator ⓘ

Convert to Choice Indicator from

Priority ▼

Please select choice column in the right drop-down list to convert it to Choice Indicator

- Click **OK**. You will enter the **Change Column** page. Assign colors to each list choice and click **OK** to save the settings.

Name and Type

Type a name for this column.

Column name:

Priority

The type of information in this column is:

Choice Indicator

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

Yes No

Enforce unique values:

Yes No

Type each choice on a separate line:

(1) High
(2) Normal
(3) Low

Indicator Setting:

Choice	Color Number	Color
(1) High	0xDC143C	Crimson
(2) Normal	0xFFD700	Gold
(3) Low	0x008B8B	DarkCyan

e. After saving the settings, the Choice Indicator settings will appear in the list view.

All Tasks Calendar Completed ...

Task Name	Priority	Status	Start Date	Due Date
Tech Discussion ✱	High	Pending	10/17/2017	10/17/2017
DocViewer Release ✱	Normal	Completed	10/18/2017	10/18/2017
Website test ✱	High	Pending	10/16/2017	10/16/2017
Team training ✱	Low	Completed	10/2/2017	10/2/2017
New product meeting ✱	Normal	Pending	10/5/2017	10/5/2017

3.4.2 Convert to Choice Indicator from SharePoint Choice

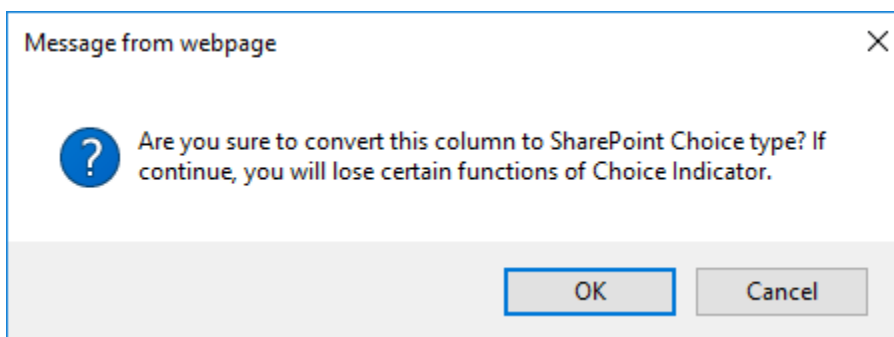
This function helps you to convert a Choice Indicator column to a SharePoint Choice column.

- a. First select the Choice Indicator column you want to convert into a SharePoint Choice column and then enter the **Change Column** page.
- b. Tick the checkbox next to **Convert to SharePoint Choice type**.

Convert:

Convert to SharePoint Choice type

- c. A dialog box will appear as follows:



- d. Click **OK** to confirm the conversion.
- e. After confirmation, click OK to save the configuration. The SharePoint Choice values will appear in the list as text corresponding to the criteria you specified on the indicator settings list.

All Tasks Calendar Completed ...

✓	Task Name	Priority	Status	Start Date	Due Date
	Tech Discussion ✱	... (1) High	■	10/17/2017	10/17/2017
	DocViewer Release ✱	... (2) Normal	■	10/18/2017	10/18/2017
	Website test ✱	... (1) High	■	10/16/2017	10/16/2017
	Team training ✱	... (3) Low	■	10/2/2017	10/2/2017
	New product meeting ✱	... (2) Normal	■	10/5/2017	10/5/2017

4. 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 Choice Indicator without entering any license code for a period of 30 days from when you first use it.

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

Finding License Information

- a. In the products main page, click the trial link and enter the **License Management Center**.
- b. Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).

Download License Information X

Download the license type information and send to sales@boostsolutions.com to get license.

Choose a license type

Server License
Server Code: 8fa4fcbbeab9475d8b8f10d2c7b27e1e982261612
75d49c683442a828de45bdd

Farm License
Farm ID: {8fa4fcbbeab9-475d-8b8f-10d2c7b27e1e}
Number of Users: 43 user(s)

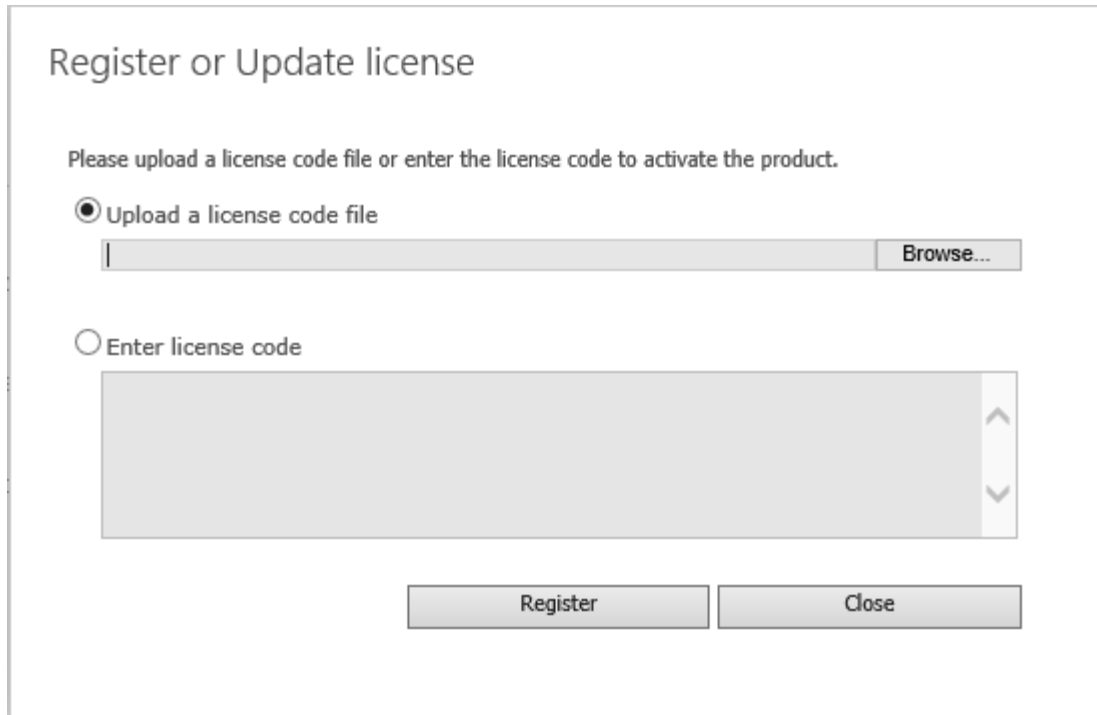
Site Collection License
Site Collection ID: Select a site collection
Site Collection:

In order for BoostSolutions to create a license for you, you need to 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.

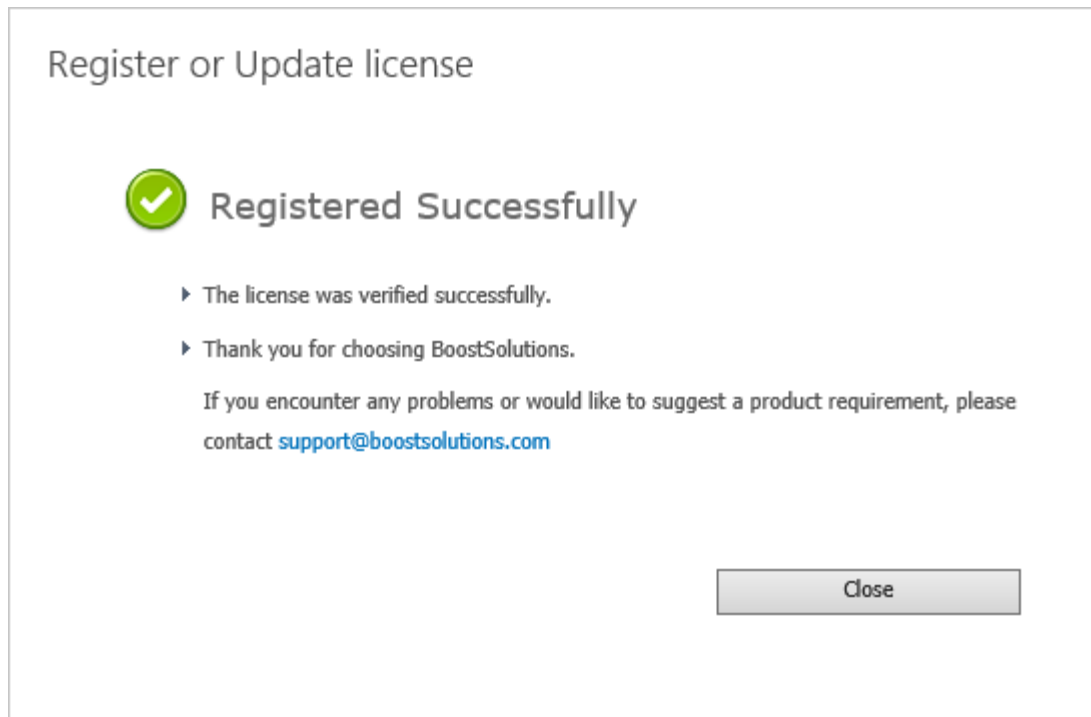
License Registration

- 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.



The screenshot shows a dialog box titled "Register or Update license". Inside the dialog, there is a prompt: "Please upload a license code file or enter the license code to activate the product." Below this prompt are two radio button options. The first option, "Upload a license code file", is selected. It is followed by a text input field and a "Browse..." button. The second option, "Enter license code", is unselected and is followed by a large, empty text area with a vertical scrollbar on the right side. At the bottom of the dialog, there are two buttons: "Register" and "Close".

- 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](#).