# SharePoint Choice Indicator Installation Instruction

#### **System Requirements:**

Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007.

#### License management:

To upgrade from a trial license, click the manage license link found on the Choice Indicator column configuration page.

Column name: Status The type of inf Choice Indic	formation in this column is: ator					
Description:	nis column contains information: No					
You are usin please click I Type each cho Not Star In Progr Complete Deferred	You are using a trial license for Choice Indicator 1.0.326.0 (8 days left), please click here to manage lice se Type each choice on a separate line: Not Started In Progress Completed					
, Indicator Sett	ing:	_				
Choice Not Started	Color Number 0x0000FF	Color Blue				
In Progress	0x006400	DarkGreen				
Completed	0xFF8C00	DarkOrange 🗾 💌				
Deferred	0xDC143C	Crimson				
Waiting on someone else	0x00FFFF	Aqua				

On the License Management page, click the "get license" link to purchase a license and retrieve a license code. You will be prompted to send an email to sales@sharepointboost.com containing the Site Collection ID, Farm ID, and the license code. Copy and paste the license code into the text box.

License Information	
Farm ID:	{fe838b79-d099-43ec-963e-b14b28384341}
Site Collection ID:	50a5560b-eca4-4ada-b298-e9eee8032b0a
Current amount of users belonging to this site collection:	44 Download user details
License status:	No Registration
Add license(ASCII):	<u>Click herento get license</u>
	*
1	
	ОК

Once you have copied and pasted the license code in the box, click OK to validate your license.

License Information Farm ID:	{fe838b79-d099-43ec-963e-b14b28384341}
Site Collection ID:	50a5560b-eca4-4ada-b298-e9eee8032b0a
Current amount of users belonging to this site collection:	44 Download user details
License status:	50
Add license(ASCII):	Click here to get license
32fb31f0e98dNXtdAaQhtbqSDA+EJ+v8mXneUwRqGMmh 86VtHruJnegBWtiod2HmffRUX+D13McS4kW6cSbCvdAdjg rWU9xaiQ7QkBC+CQaBUfGmgK9nGcNKjvWeCh/aSJ8BQ LRry0F4mogltwuVxXc8L7Iv06/L8BmugSCrTRGH4KBNOA nIi+bNBpJpf077GifW1BjnGEe+gKhUK0trucKo8dSYwmXz S3fkN30X9sT0yaaF7CG7T/w0L8bvcDwK/PZYDxjqi1KzEb qaGBvxvmZq6wbeG/LsjWobt9NyIB2T512sdIsAvnE+cYsI ZwOW3Nf07+i5jp5xakIe6uQI2PQBjwg3GSFfNbHE3cv86y cStf+TeNpiMUcO9aoEhbNLX9a+sdc2i+VEj8wISKYoPLfwG	adrusxd4UfbNfg+113bNMkcxAoZXgsvDR5mPRKgCTuygUjNx gIis1LjufWc1EDrVF1tYiWmRJXckS2wFTSFoYbtH2y11ios=L70 DjwgxZtGtLKaqYAqkpjA7DYWaDzRuKLXl4WMzh96yVFP06Aw qEfOm6iEwxdgGxoHX5pPkPkdUfG2F1WN01j68p8j87uojspBt 4XBfCa1BIPLsVSAzr0Ukzw0TRPC4GCLhZiaXnt47sAluyRbW DsoqpqF5nnk2Z8xjBKjCQ3CbruoZ3paPH6nzRI0NzmI7RaAY 6bnpT6OAPAfnWKnuQRUnK84tAQLEkcjbtiq6Sl8dYQfhCPesq /9N/f3JrgSr6PABGJmXE//5l5vFdiDncb4WZfOtFb89jD0okBKt 33083DXTa7Ljl6O36jumFJ/C+ML+JfBylxnYvU8isBv0p3yHCG age and

OK

Once you receive notification that your license has been successfully validated, you can use the Choice Indicator feature.

#### Installation:

Download the SharePoint Choice Indicator setup file at http://www.sharepointboost.com, and save the file to a folder. Next, open the folder and run "setup.exe".



#### Note:

You must be the SharePoint Farm Administrator; start "Windows SharePoint Services Administration" and "Windows SharePoint Services Timer" in services management prior to installation.

🍇 Services				
<u>File Action View</u>	Help			
	3  😫 🖬   ▶ ▶ ■ ॥ ■>			
🆏 Services (Local)	Name 🛆	Description	Status	Startup Type 🛛 🛯 🔺
	🦓 Windows Internet Name Service (WINS)	Resolves Ne	Started	Automatic L
	🦓 Windows Management Instrumentation	Provides a c	Started	Automatic L
	Windows Management Instrumentation Driver Extensions	Monitors all		Manual L
	Windows Presentation Foundation Font Cache 3.0.0.0	Optimizes p		Manual L
	Windows SharePoint Services Administration	Performs ad	Started	Automatic
	🖓 Windows SharePoint Services Search	Provides full	Started	Manual t
	Windows SharePoint Services Timer	Sends notifi	Started	Automatic 💦
Windows SharePoint Services Tracing		Manages tra	Started	Automatic L
	🦓 Windows SharePoint Services VSS Writer	Windows Sh		Manual L
	🦓 Windows Time	Maintains da…	Started	Automatic L
	🦓 Windows User Mode Driver Framework	Enables Win		Manual L
	WinHTTP Web Proxy Auto-Discovery Service	Implements		Manual I
	🦓 Wireless Configuration	Enables aut	Started	Automatic I
	MawMI Derformence Odenter	Drovidas par		Manual
	Extended Standard			

Run the setup file. You may have to wait for a few seconds for the system check to complete. Then click "next".

SharePoint Choice Indicator 1.0.326.0				
System Check Checking if SharePoint Choice Indicator 1.0.326.0 can be installed from this ma	Choice			
<ul> <li>Windows SharePoint Service 3.0 is installed.</li> <li>You have permission to install and deploy SharePoint solutions.</li> <li>The Windows SharePoint Services Administration service is started.</li> <li>The Windows SharePoint Services Timer service is started.</li> <li>Solution file found.</li> <li>SharePoint Choice Indicator 1.0.326.0 is not installed.</li> </ul>				
All checks succeeded. Please click Next to proceed with the installation.				
Mondosoft SharePoint Solution Installer	ort			

After you have read and accepted the terms in the License Agreement, click "next" to continue.

SharePoint Choice Indicator 1.0.326.0
End-User License Agreement Please read the following license agreement carefully
PLEASE READ THIS END-USER LICENSE AGREEMENT ("EULA") CAREFULLY. BY INSTALLING OR USING THE SOFTWARE THAT ACCOMPANIES THIS EULA ("SOFTWARE"), YOU AGREE TO THE TERMS OF THIS EULA. IF YOU DO NOT AGREE, DO NOT USE THE SOFTWARE AND, IF APPLICABLE, RETURN IT TO THE PLACE OF PURCHASE FOR A FULL REFUND.
INFORMATION FROM YOUR SERVER TO SHAREPOINTBOOST COMPUTER SYSTEMS WITHOUT YOUR CONSENT.
<ol> <li>GENERAL. This EULA is a legal agreement between You (either an individual or a single entity, also used in the form "You" where applicable) and SharePointBoost Software Studio ("SharePointBoost"). This EULA governs the Software, which includes software (including online and electronic documentation) and any associated media and</li> </ol>
I accept the terms in the License Agreement
Kext ->       Abort         Mondosoft SharePoint Solution Installer       Abort

Please select one or more web applications as your deployment targets, then click "Next".

SharePoint Choice Indicator 1.0.326.0	
Deployment Targets Please select one or more web applications	Choice
Web Applications:	
<ul> <li></li></ul>	
Please click the Next button to start the installation process.	
Mondosoft SharePoint Solution Installer	Abort

Installation may take several minutes; you can cancel installation at any time by hitting the "abort" button.

Once the process has finished, click "next" for more deployment details.



Following installation, you will receive a success message containing target installation details. Click "close" to finish.

SharePoint Choice Indicator 1.0.326.0	
Installation Successfully Completed	Choice
Details: ***** SOLUTION DEPLOYMENT ***** BRY : http://bry:5140/ : The solution was successfully deployed. BRY : http://bry:47947/ : The solution was successfully deployed. BRY : http://bry:5743/ : The solution was successfully deployed. BRY : http://bry/ : The solution was successfully deployed.	
Mondosoft SharePoint Solution Installer	lext-> <u>Close</u>

#### **Product Activation and Use:**

Site Actions 🔻



On the Site Settings page, click "Site collection features".

Site Information				
Site URL:	http://bry/sit	tes/Tutorial/		
Mobile Site URL:	http://bry/sites/Tutorial/_layouts/mobile/default.aspx			
Version:	12.0.0.4518			
Users and Permissions	Look and Feel	Galleries	Site Administration	Site Collection Administration
People and groups	Master page	Site content types	Regional settings	Search settings
<ul> <li>Site collection administrators</li> </ul>	<ul> <li>Title, description, and icon</li> </ul>	<ul> <li>Site columns</li> <li>Site terrelater</li> </ul>	<ul> <li>Site libraries and lists</li> </ul>	Search scopes
Advanced permissions	<ul> <li>Navigation</li> <li>Page layouts and site templates</li> </ul>	<ul> <li>Site templates</li> <li>List templates</li> <li>Web Parts</li> </ul>	<ul> <li>Site usage reports</li> <li>User alerts</li> <li>RSS</li> </ul>	<ul> <li>Recycle bin</li> <li>Site directory settings</li> </ul>
	<ul> <li>Welcome page</li> <li>Tree view</li> <li>Site theme</li> </ul>	<ul> <li>Workflows</li> <li>Master pages and page layouts</li> </ul>	<ul> <li>Search visibility</li> <li>Sites and workspaces</li> </ul>	<ul> <li>Site collection usage reports</li> <li>Site collection features</li> <li>Site hierarday</li> </ul>

In the Site collection features list, click the "activate" button next to Choice Indicator.



Choice Indicator 1.0.326.0 Showing your choices as color indicator (Powered by SharePointBoost) Open the list or library where you want to apply the choice indicator. On the Settings menu, click "Create Column".

Tasks					
Use the Tasks list to keep	track of w	ork that you or your team needs to comple	ete.		
New • Actions •	Settings	•	View:	All Tasks 🔹	
🖉 Title 🔘 Assig		Create Column	2	% Complete	
There are no items to show		information about each item.	, click "New" abov	e.	
	ΠČ	Create View Create a view to select columns, filters, and other display settings.			

On the Create Column page, enter a name of your choosing (e.g. Status) and then choose Choice Indicator as your column type.

Create Column: Tasks	
Use this page to add a column to this list.	
Name and Type Type a name for this column, and select the type of information you want to store in the column.	Column name:         Status         The type of information in this column is:         O Single line of text         O Multiple lines of text         O Choice (menu to choose from)         O Number (1, 1.0, 100)         O Currency (\$, ¥, €)         O Date and Time         O Lookup (information already on this site)         O Yes/No (check box)         O Person or Group         O Hyperlink or Picture         O Calculated (calculation based on other columns)
	Choice Indicator (showing your choices as color indicator)     Rusiness data

In the Additional Column Settings section, specify a color for each choice and then click OK.

Additional Column Settings Specify detailed options for the type of information you selected.	Description:		
	Require that th O yes O	iis column contains information: No	
	Type each cho	ice on a separate line:	
	Not Star In Progr Complete Deferred	ted ess d	
	Indicator Setti	ng:	
	Choice Not Started	Color Number	Color Aqua
	In Progress	0×006400	DarkGreen 🔽
	Completed	0xFF8C00	DarkOrange 🗸
	Deferred	0xDC143C	Crimson
	Waiting on	0x0000FF	Blue

Now you can create a new item using the Choice Indicator feature (see the following example):

else

Tasks					
Use the Tasks list to keep	o track of work that you	ı or your team r	needs to complet	te.	
New • Actions •	Settings 🝷			View: A	ll Tasks 🔹
Title	Assigned To	Status	Priority	Due Date	% Complete
Training NEW	lily	•	(1) High	4/1/2009	50%

#### Uninstallation:

Run "setup.exe" again. (If the setup file has been deleted, please download it from http://www.sharepointboost.com)

On the Repair and Remove page, select "Remove" and click next. The SharePoint Choice Indicator feature will then be uninstalled.

SharePoint Choice Indicator 1.0.326.0	
Repair or Remove Please select the operation you wish to perform	Choice
SharePoint Choice Indicator 1.0.326.0 is already installed. What would you like to do?	
<ul> <li>Repair Retracts the solution from all web applications and deploys it once again.</li> <li>Remove Retracts the solution from all web applications and deletes it from the SharePoint solution store.</li> </ul>	
Mondosoft SharePoint Solution Installer	Abort

Then, delete the Choice Indicator Column in the list or library in which SharePoint Choice Indicator is created.

Columns		
A column stores information abou	t each item in the list. The following columns a	re currently available in this list:
Column (click to edit)	Туре	Required
Title	Single line of text	~
Priority	Choice	
% Complete	Number	
Assigned To	Person or Group	
Task Group	Person or Group	
Description	Multiple lines of text	
Start Date	Date and Time	
Due Date	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	
Status		Delete this pyalid field

## **SharePoint Choice Indicator Tutorial**

The SharePoint Choice Indicator feature allows users to classify list elements by assigning a color to each element in the list.

The following is an example of how to use the Choice Indicator feature:

#### 1. Create a Choice Indicator column

Open the list or library where you want to apply the Choice Indicator feature. In the **Settings** menu, click **Create Column**.





In the Name and Type section, type a column name of your choosing (e.g. Status) and select Choice Indicator.

# Create Column: Tasks

Use this page to add a column to this list.

#### Name and Type

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

Column name:
Status
The type of information in this column is:
C Single line of text
C Multiple lines of text
C Choice (menu to choose from)
O Number (1, 1.0, 100)
C Currency (\$, ¥, €)
O Date and Time
O Lookup (information already on this site)
O Yes/No (check box)
O Person or Group
O Hyperlink or Picture
Calculated (calculation based on other columns)
Choice Indicator (showing your choices as color indicator)
C Business data

In the Additional Column Settings section, enter your choice types and assign a color to each of them. In the below example, "Not Started," "In Progress," "Completed," etc. were entered as choice types (classification types).

Additional Column Settings Specify detailed options for the type of information you selected.	Description:	is column contains information: No	A V
	Type each cho Not Star In Progre Complete Deferred	ice on a separate line: ted ess d	
	Indicator Setti	ng:	
	Choice Not Started	Color Number 0x00FFFF	Color Aqua
	In Progress	0x006400	DarkGreen
	Completed	0xFF8C00	DarkOrange
	Deferred	0xDC143C	Crimson
	Waiting on someone else	0x0000FF	Blue
	Display choices O Drop-Down O Radio Butt	s using: n Menu cons es (allow multiple selections)	

Configure any additional settings in the Additional Column Settings section, and then click OK to save the configuration.

#### 2. Display the Choice Indicator value in your Task list

After you have completed configuration, create a new item and set a status for it.

Department Tasks	New Item		
		ОК	Cancel
🛿 Attach File   🍄 Spelling		* indicates	s a required field
Title *	Tech Discussion		
Priority	(1) High 💌		
Status	<ul> <li>Not Started</li> <li>In Progress</li> <li>Completed</li> <li>Deferred</li> <li>Waiting on someone else</li> </ul>		
% Complete	0 %		
Assigned To	<u>cathy</u>		8 <sub>1</sub> / 🔝
Description		∰ ∰   <u>A</u> <	> T T 4
Start Date	3/28/2009		
Due Date	4/2/2009		
		ОК	Cancel

After saving the item, the Choice Indicator will appear in the list as a colored square corresponding to the criteria you specified on the indicator settings list. When you mouse over the color indicator, the choice value will be displayed.

Department 1	Tasks: Tech Discussion
	Close
🖃 New Item   📑 Edit 1	Item   🗙 Delete Item   📲 Manage Permissions   俊 Workflows   Alert Me
Title	Tech Discussion
Priority	Not Started igh
Status	
% Complete	0%
Assigned To	cathy
Description	
Start Date	3/28/2009
Due Date	4/2/2009

Tasks					
Use the Tasks list to keep	o track of work that you or y	our team needs to complete	2.		
New • Actions •	Settings 🝷			View: All T	asks 🔹
Title	Assigned To	Prior Not Started s	Due Date	Start Date	% Complete
Tech Discussion I NEW	cathy	(1) High	4/2/2009	3/28/2009	0%

You can create several items and assign Choice Indicator values to each individual task item.

Department	t Tasks				
Use the Tasks list to kee	p track of work tha	t you or your team needs to c	omplete.		
New • Actions •	Settings 🝷			View: All Ta	sks 🔹
Title	O Assigned To	Priority Not Started S	Due Date	Start Date	% Complete
Tech Discussion	cathy	(1) High	4/2/2009	3/28/2009	0%
Write case	lily	(2) Normal	3/31/2009	3/26/2009	50%
Tech support	henry	(3) Low	3/26/2009	3/24/2009	100%
Product demo	hans	(1) High	4/2/2009	3/30/2009	0%
Product launch	mike	(2) Normal	4/3/2009	3/31/2009	0%

### 3. Convert to SharePoint Choice from Choice Indicator

Go to the Choice Indicator configuration page, check the **Convert to SharePoint Choice type** checkbox. You will be prompted to confirm you want to revert to SharePoint Choice type. After you confirm, click OK to save the configuration.

Choice	Color Number	Color
Not Started	0x00FFFF	Aqua
In Progress	0x006400	DarkGreen
Completed	0xFF8C00	DarkOrange
Deferred	0xDC143C	Crimson
Waiting on someone else	0x0000FF	Blue

#### Windows Internet Explorer

Are you sure to convert this column to SharePoint Choice type? If continue, you will lose certain functions of Choice Indicator.



After saving the item, the SharePoint Choice value will appear in the list as text corresponding to the criteria you specified on the indicator settings list.

# Department Tasks

Use the Tasks list to keep track of work that you or your team needs to complete.						
New • Actions •	Settings 🝷				View: All Tas	iks 🔹
Title	Assigned To	Priority	Status	Due Date	Start Date	% Complete
Tech Discussion	cathy	(1) High	Not Started	4/2/2009	3/28/2009	0%
Write case	lily	(2) Normal	In Progress; Deferred	3/31/2009	3/26/2009	50%
Tech support	henry	(3) Low	Completed	3/26/2009	3/24/2009	100%
Product demo	hans	(1) High	Waiting on someone else	4/2/2009	3/30/2009	0%
Product launch	mike	(2) Normal	Deferred	4/3/2009	3/31/2009	0%

4. Convert to Choice Indicator from SharePoint Choice

On the Settings menu, click Create Column and select Choice Indicator. Then, in the Additional Column

Information section, click the "Convert to Choice Indicator from" link

	Display choices using:
	🖸 Drop-Down Menu
	C Radio Buttons
	C Checkboxes (allow multiple selections)
	Allow 'Fill-in' choices:
	C Yes C No
	Default value:
	Choice C Calculated Value
	Enter Choice #1
	Convert:
	Convert to Choice Indicator from
~	Add to default view

On the **Convert to Choice Indicator** page, choose the appropriate column from the drop-down list, and click OK.

Convert to Choice Indicator	
Please select choice column to convert it to Choice Indicator	
<b>Convert to Choice Indicator from</b> Please select choice column in the right drop-down list to convert it to Choice Indicator	Priority
	OK Cancel

Assign your chosen colors to each list choice and click OK.

1

Name and Type Type a name for this column.	Column nan Priority The type of Choice In	ne: , f information in this column is: ndicator	
Additional Column Settings Specify detailed options for the type of information you selected.	Description:		
	Choice (1) High (2) Normal (3) Low	Color Number 0xA52A2A 0xFFD700 0x008B8B	Color Brown

After saving, your SharePoint Choice Indicator settings will appear in the list view. The Choice Indicator will appear in the list as a colored square corresponding to the criteria you specified on the indicator settings list. When you mouse over the color indicator, the choice value will be displayed.

#### Department Tasks Use the Tasks list to keep track of work that you or your team needs to complete. Settings -View: All Tasks New • Actions -Ŧ % Complete Title Assigned To Status Due Date Start Date Priority Tech Discussion cathy Not Started 4/2/2009 3/28/2009 0% In Progress; Deferred Write case lily 3/31/2009 3/26/2009 50% Tech support Completed 3/26/2009 3/24/2009 100% henry Product demo Waiting on someone else 4/2/2009 3/30/2009 0% hans Product launch Deferred mike 4/3/2009 3/31/2009 0%