List Advanced Filter 2.0

User Guide

Copyright

Content

1. Introduction

BoostSolutions List Advanced Filter provides users compatibility to filter any information in SharePoint list or document library using multiple columns.

This user guide will guide you to install and use List Advanced Filter on your SharePoint.

For latest version of this copy or other user guides, please visit our document center:

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

2. Installation

2.1 Product Files

After you download and unzip the List Advanced Filter 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.
List Advanced Filter_V2_User Guide.pdf	User guide of List Advanced Filter 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\Foundtion\Install.config	A file containing the configuration information for the installer.
Solutions\Classifier.ListAdvancedFilter\ BoostSolutions.SharePointClassifier.Platform14.2.wsp	A SharePoint solution package containing List Advanced Filter files and resources for SharePoint 2010 or SharePoint Foundation 2010.

	A SharePoint solution package containing
Solutions\Classifier.ListAdvancedFilter\ BoostSolutions.SharePointClassifier.Platform15.2.wsp	List Advanced Filter files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Classifier.ListAdvancedFilter\Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

Before you install List Advanced Filter, 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 greater Mozilla Firefox supported Google Chrome supported

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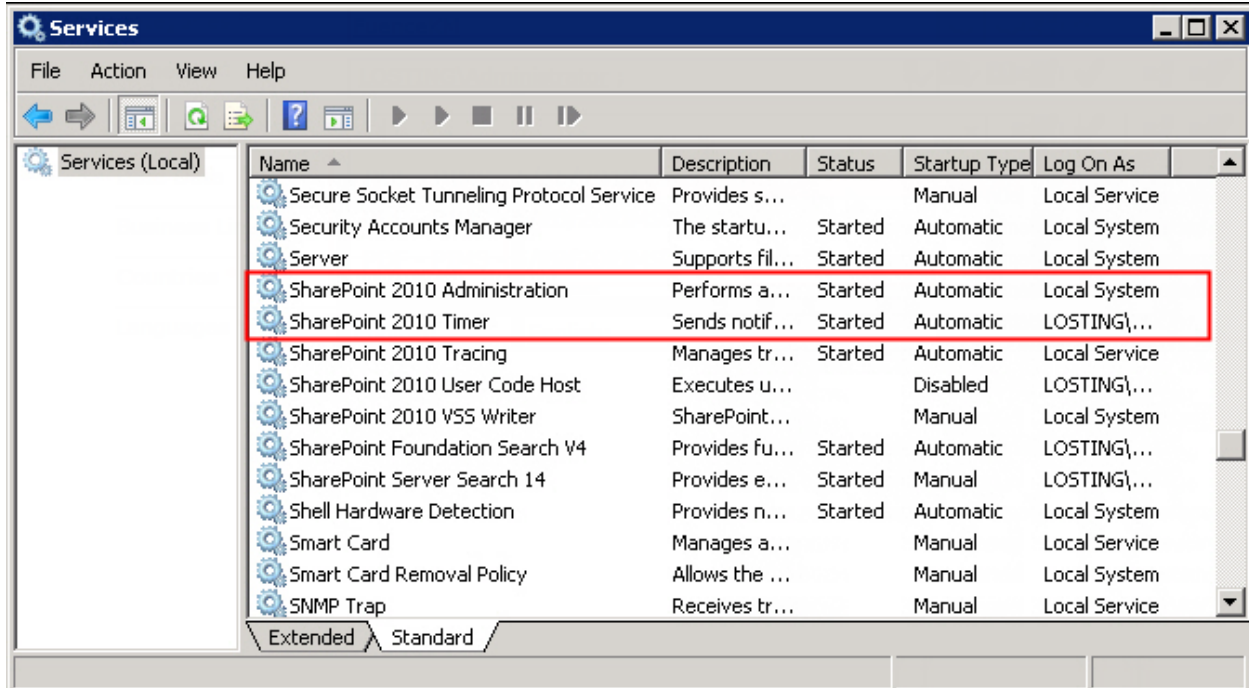
List Advanced Filter must be run on one front-end Web server in the SharePoint farm where
Microsoft SharePoint Foundation Web Application services are running. Check **Central
Administration → System Settings** for a list of servers running this service.

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 List Advanced Filter on SharePoint server.

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

2. 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.

3. 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**.

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

5. 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.

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

7.   Click **Close** to finish the installation.

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 List Advanced Filter in **SharePoint 2010** 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 List Advanced Filter to SharePoint servers

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

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

2.   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\stsadm.exe

- **SharePoint 2013**

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

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

    stsadm -o addsolution -filename <full path>BoostSolutions.FoundationSetup14.1.wsp

    stsadm -o addsolution -filename <full path>BoostSolutions.ListAdvancedFilter14.2.wsp

4. Deploy the added solution with the following command:

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

    stsadm -o deploysolution -name BoostSolutions.ListAdvancedFilter14.2.wsp -allowgacdeployment –url [virtual server url] –immediate

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

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

    stsadm -o displaysolution -name BoostSolutions.ListAdvancedFilter14.2.wsp

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

6. In the STSADM tool, activate the features.

    stsadm -o activatefeature -name SharePointBoost.ListManagement.AdvancedFilter –url [site collection url] –force

To remove List Advanced Filter from SharePoint servers

1. Removal is initiated with the following command:

    stsadm -o retractsolution -name BoostSolutions.ListAdvancedFilter14.2.wsp -immediate -url [virtual server url]

2. 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.ListAdvancedFilter14.2.wsp

    The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.
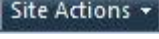
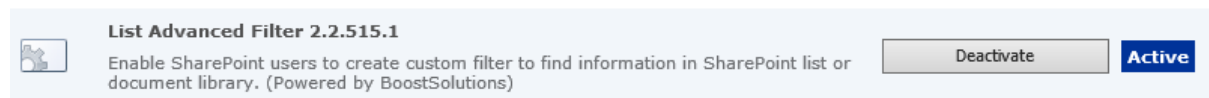3. Remove the solution from the SharePoint solutions storage:

    stsadm -o deletesolution -name BoostSolutions.ListAdvancedFilter14.2.wsp

To remove BoostSolutions Foundation from SharePoint servers

The BoostSolutions Foundation is mainly 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, please do not remove Foundation from the servers.

1. Removal is initiated with the following command:

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

2. 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.

3. Remove the solution from the SharePoint solutions storage:

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

2.7 Feature Activation

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

To activate the product feature you must be a site collection administrator.

1. On the Site Actions menu Site Actions ▾ click **Site Settings**.

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

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

3. How to use List Advanced Filter

3.1 Filter panel configuration

List Advanced Filter provides an entry for administrator to set up default filter settings for end users on the List Settings page, and for convenience, end users are also allowed to customize their own filter settings right on the list view page.

3.1.1 Set up Filter panel

List Advanced Filter allows each user to set up the filter panel in the list or document library, instead of adding the web part and connecting to the list or document library one by one.

The filter panel on the Advanced Filter Settings page and the list view page are same. Follow these steps to set up the filter panel.

1. Access the list or document library from which you want to filter information.

2. Click **Advanced Filter** under the Items or Documents tab.
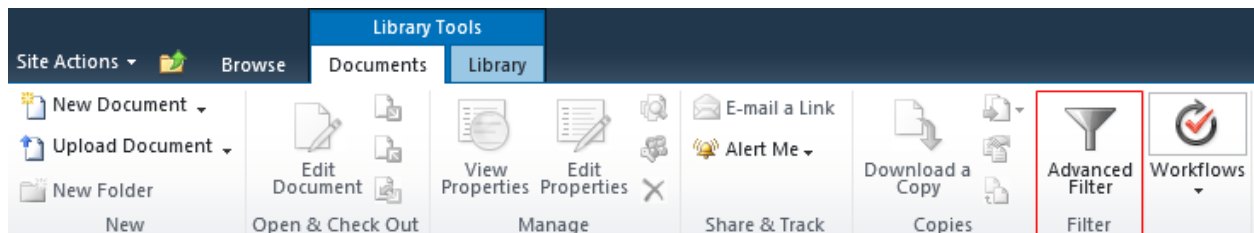
> For administrator, you can enter the **List Settings**, under the General Settings section, click **Advanced Filter Settings** to open the Configure Filter Panel page.

3. If you are using List Advanced Filter for the first time, then a **Configure Filter Panel** window will open.

> If the administrator has already set up a default filter settings, end users can click   in the filter panel to open the **Configure Filter Panel** window.

> **Criteria Settings**: Specify from which fields or columns you want to use to filter on the list or document library. You can specify the field position by selecting a number. And the fields are sorted alphabetically.

Match Rules: Specify the match rules for selected criteria.

- **Any**: Filter information if any criteria scheme matches.

- **All**: Filter information only if all criteria schemes matches.

Filter Panel Status: Specify if the filter panel is always kept expanded when the user enters the list or document library.

4. After configuring the above settings, click the **Save** button.

3.1.2 Manage Filter panel

Once the filter panel is successfully set up, the ribbon panel will appear as follows.

To modify the filter panel, click the ![icon] icon.

To close filter panel, click the ![icon] icon.

To show the filter panel, click the ![Advanced Filter icon] icon on the ribbon.

3.2 Filter information

After setting up the filter panel, users can find any information by assigning filters.

1. Enter the list or document library and expand the Filter panel.

2. Depending on how the filter is configured, select the comparison operator and type a value for each criterion.

For **Single line of text** column, List Advanced Filter provides you an **Auto Complete** feature, this feature allows you to see the relevant records as you type.

3. Click the **Filter** button or press the **Enter** key and the results will be shown in the list or document library.

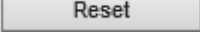4.   To clear the filters click the [Reset] button.

> **Note:** List Advanced Filter can filter items contained in folders or subfolders, and display all results in a flat view.

3.3 Comparison Operators

The following chart describes the comparison operators and the columns it applies too.

Comparison Operator	Description
═ Equal to	Column value equals to the specified value.
	Columns: Single line of text, Hyperlink or Picture, Person or Group, Number, Currency, Yes/No, Managed Metadata and Lookup
≠ Not equal to	Column value does not equal to the specified value.
	Columns: Single line of text, Hyperlink or Picture, Person or Group, Number, Currency, Yes/No, Managed Metadata and Lookup
[Begins with	Begins with a specified character.
	Columns: Single line of text, Multiple lines of text, Hyperlink or Picture and Managed Metadata, Person or Group
✳ Contains	Contains specific characters anywhere in the text.
	Columns: Single line of text, Multiple lines of text, Hyperlink or Picture, Managed Metadata, Person or Group
D Custom date	Column value equals to a specified date.
	Columns: Date and Time
D. Custom date range	Column value within a custom date or time range.
	Columns: Date and Time
Before than	Column value before a specified date.
	Columns: Date and Time
Later than	Column value after a specified date.
	Columns: Date and Time
Last 7 days	Column value within the last 7 days.
	Columns: Date and Time

Last week (Sun-Sat)	Column value within the last week (from Sunday to Saturday).
	Columns: Date and Time
Last 14 days	Column value within the last 14 days.
	Columns: Date and Time
This month	Column value within the current month.
	Columns: Date and Time
Last 30 days	Column value within the last 30 days.
	Columns: Date and Time
Last month	Column value within the last month.
	Columns: Date and Time
N Custom number	Column value equals the specified value.
	Columns: Number and Currency
N Custom number range	Column value within a specified value range.
	Columns: Number, and Currency
Less than	Column value is less than a specified value.
	Columns: Number and Currency
Greater than	Column value is greater than a specified value.
	Columns: Number and Currency

3.4 Supported columns

List Advanced Filter can filter data within the following columns:

Single line of text, Multiple lines of text, Choice, Number, Date and time, Currency, People or Group, Lookup, Managed Metadata, Hyperlink or Picture.

3.5 Supported libraries and lists

List Advanced Filter can work on the following libraries and lists:

Document libraries:

Asset Library, Document Library, Picture Library, Slide Library, Dashboard Library, Form Library, Report Library and Site Pages Library, Document Set Library

Lists:

Announcements, Tasks, Contacts, Calendar, Custom List, Issue Tracking, Links, Project Task and Agenda

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 A: License Management

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

To use the product after expiration, you will need to purchase a license and register the product.

Finding License Information

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

2. 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 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.

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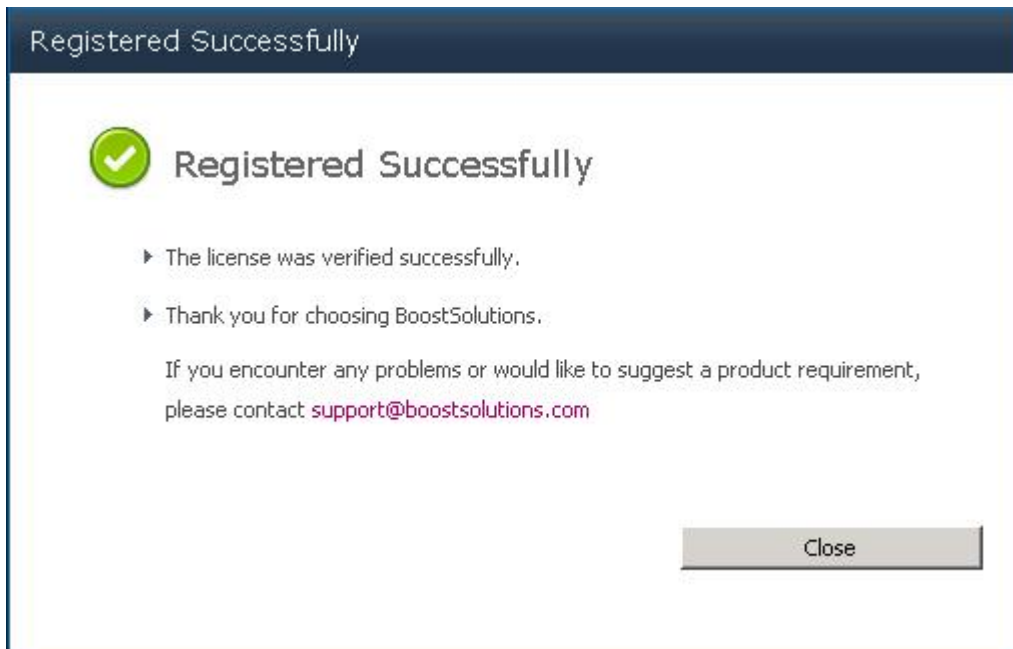
License Registration

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

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

3. 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.