

SharePoint List Filter Webpart User Manual

Version 1.1

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2 Introduction

2.1 Overview

The list filter, which is a web part for Microsoft SharePoint team sites, can be connected to any standard or custom SharePoint list and allows for filtering of a current view in accordance with freely selected criteria. This in turn allows the columns and field types of the connected lists to be read out and filtered. Once a list filter has been created it can be archived permanently and is thus available to all team members.

2.2 Technical requirements

- Windows SharePoint Service 3.0 or SharePoint 2010
- Windows SharePoint Service Administration service
- Windows SharePoint Service Timer service
- Site Collection administrator rights (needed for installation and deployment only)

2.3 Features

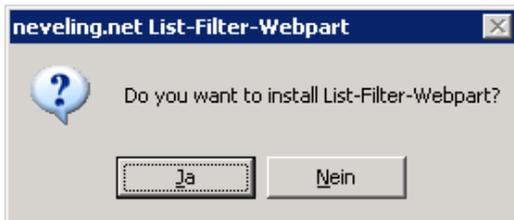
- Connections can be created with any SharePoint list as well as Document-, Form- and Image-libraries
- Searches are enabled in a specific field, all fields, or all fields in the current list view
- Various fields can be interconnected via Boolean operators
- All SharePoint search conditions are available
- Proprietary filters can be connected to integrated SharePoint filters
- Dynamic entry fields in accordance with the selected field type
- Supports 16 different SharePoint field types
- Search entry validation
- Stores and saves lists of search queries (only available for authenticated users)
- Optional setting a saved query as a default filter set
- Supports date and user field placeholders
- Optional filtering in hidden fields
- Optional selection of available fields
- Combining the interaction with a filter set up in the Sharepoint view
- Optional display filter result toolbar

3 Installation and configuration

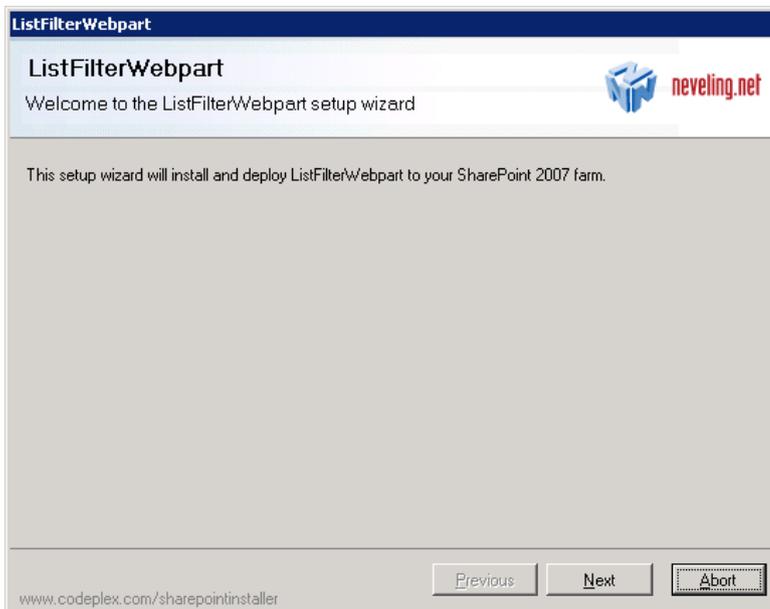
3.1 Installation

Proceed as follows to install List Filter Web Part in your SharePoint farm.

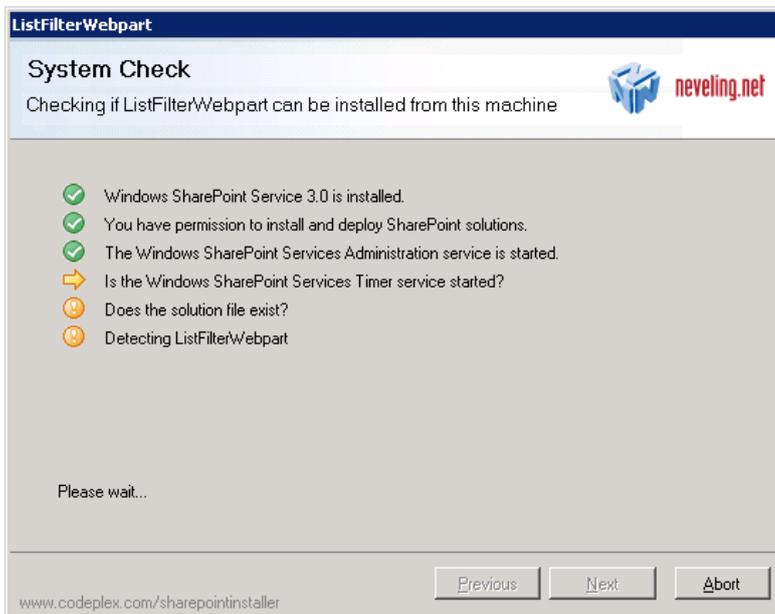
1. Unzip the **ListFilterWebpart-Setup.zip** file to any directory.
2. Launch the unzipped **ListFilterWebpart-Setup .exe** file on your SharePoint server
3. Click **Yes** in the following dialog.



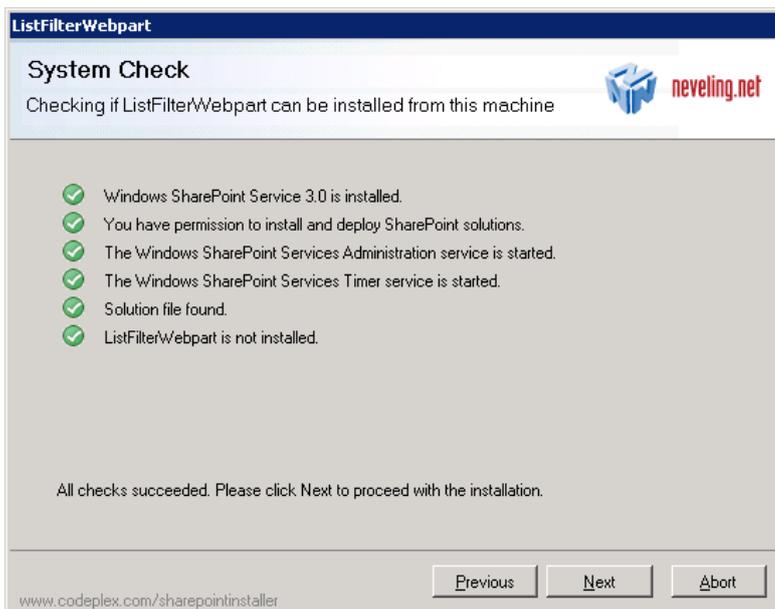
4. Click Next in the following dialog to continue with the installation process.



- Your system will verify that List Filter Web Part can be installed from your machine.



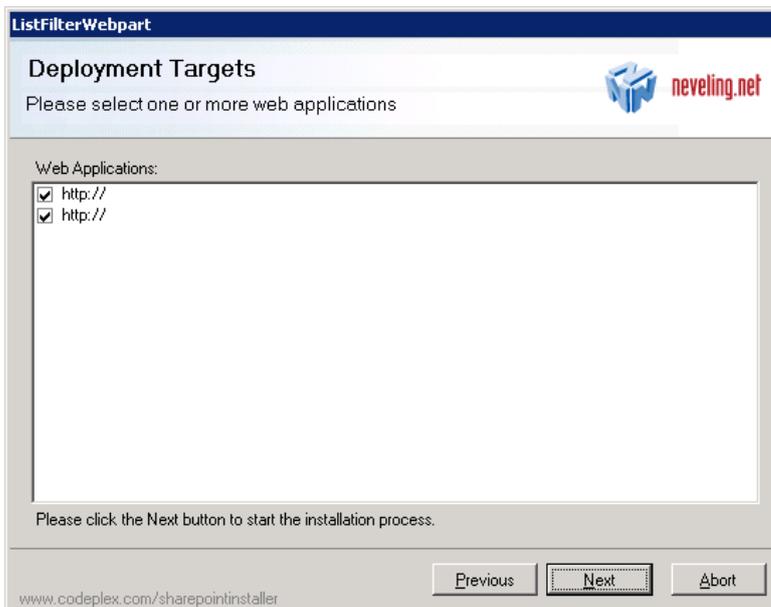
- If the system check is successful, click **Next** to continue with the installation process. If the system check detects any problem, you will need to resolve it and then restart the installation process.



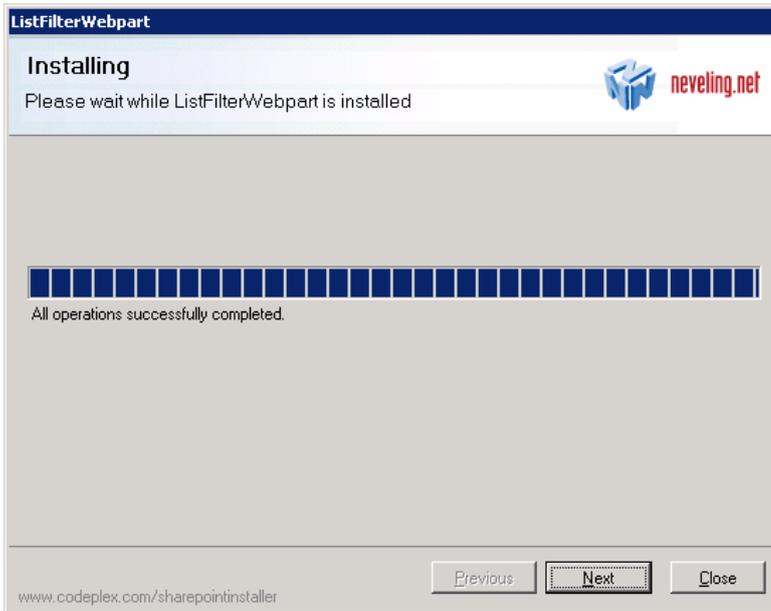
- To complete the installation process, you must accept the licensing agreement by clicking the checkbox at the lower left



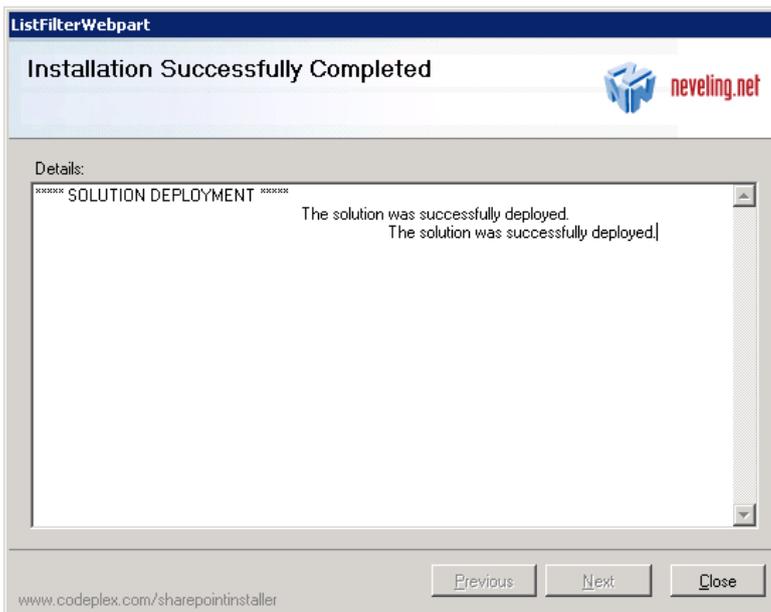
- You will now see a list of deployment targets for List Filter Web Part. Select one or more targets and click **Next** to launch the installation process.



- List Filter Web Part will now be installed. When the installation has been completed, click **Next**.



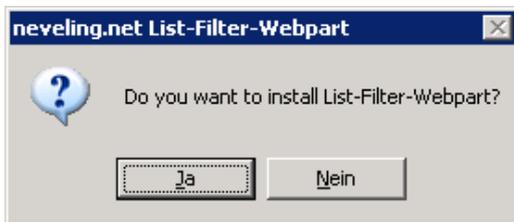
- The installation is now completed. To close the installation wizard, click **Close**.



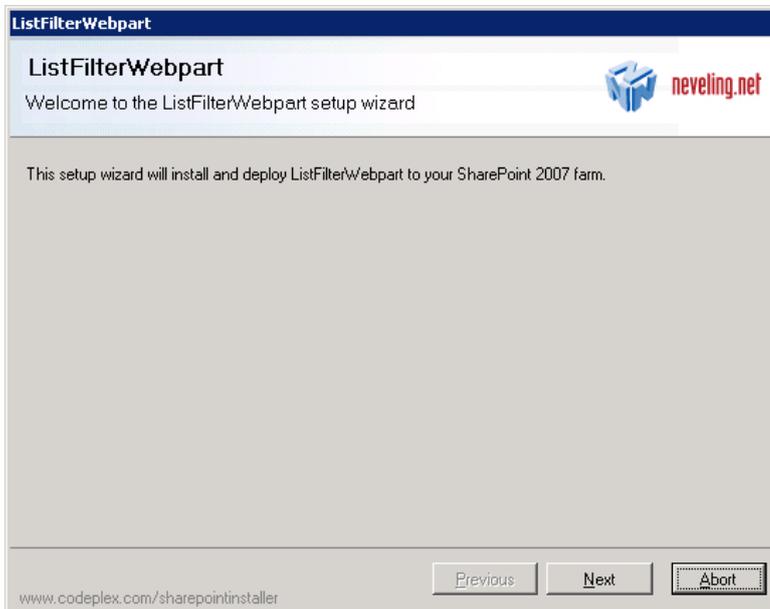
3.2 Deinstallation and version updates

Proceed as follows to remove List Filter Web Part from your SharePoint farm or to update List Filter Web Part:

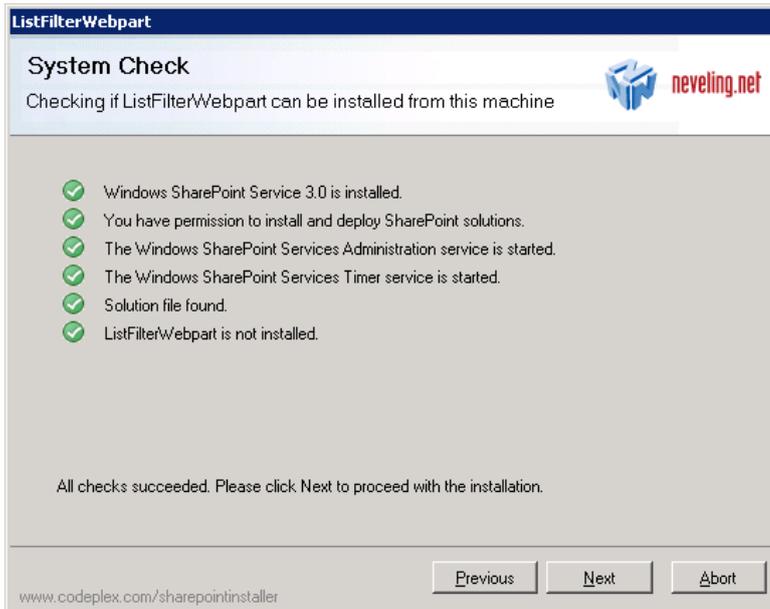
1. Launch the **ListFilterWebpart-Setup.exe** file
2. Click **Yes** in the following dialog.



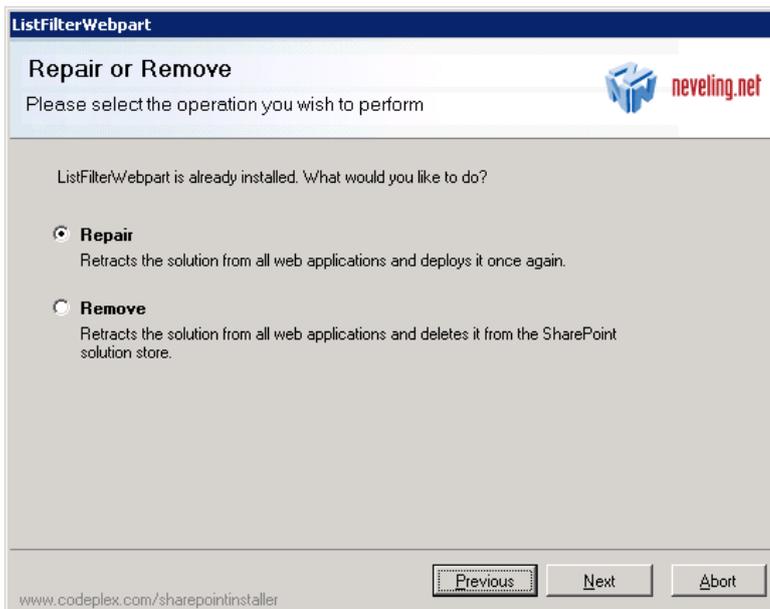
3. Click Next in the following dialog.



- When the system check has been completed, click **Next** in the following dialog.



- To uninstall List Filter Web Part, select **Remove** and then click **Next**. To install a new version or repair the existing one, click **Repair** and then **Next**.



- Then follow the instructions on the screen.

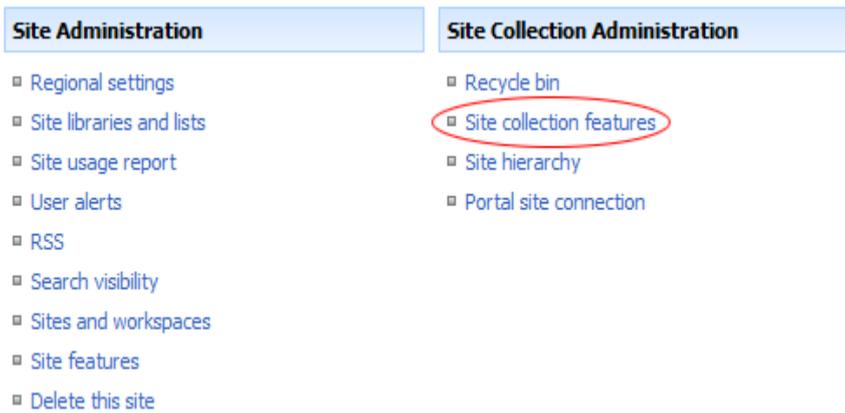
3.3 Creating List Filter Web Part at a SharePoint site

After you install List Filter Web Part, you will need to integrate the list filter with the SharePoint site. To do this, proceed as follows:

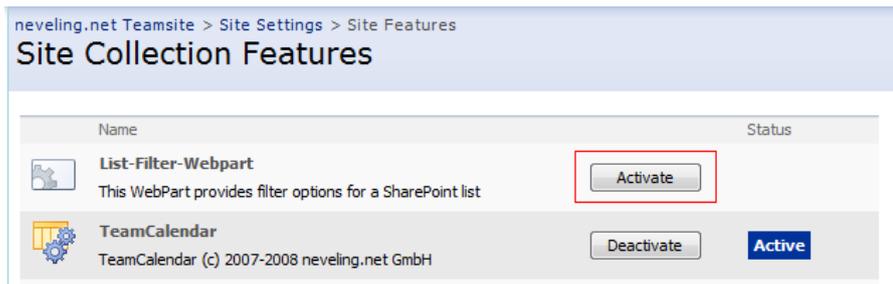
1. Open the **Site Actions** menu at your team site and select **Site Settings**.



2. Select Site Collection Features.



3. Click **Activate**.



List Filter Web Part is now available on your team site's site collection platform.

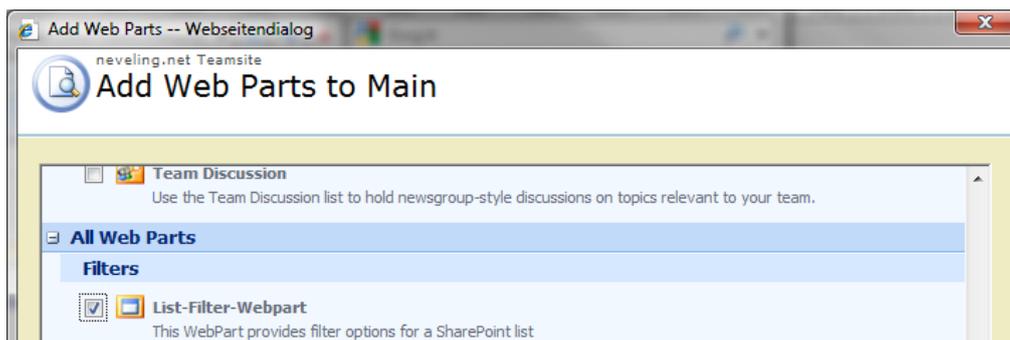
- To connect the list filter on the page to the list that is to be filtered, open the **Site Actions** menu and click **Edit Page**.



- Now click **Add a Web Part**.



- A window will open containing a list of all available web parts. Activate the List Filter Web Part checkbox and then click Add.



List Filter Web Part is now integrated with the page.

3.4 Removing List Filter Web Part from the SharePoint site

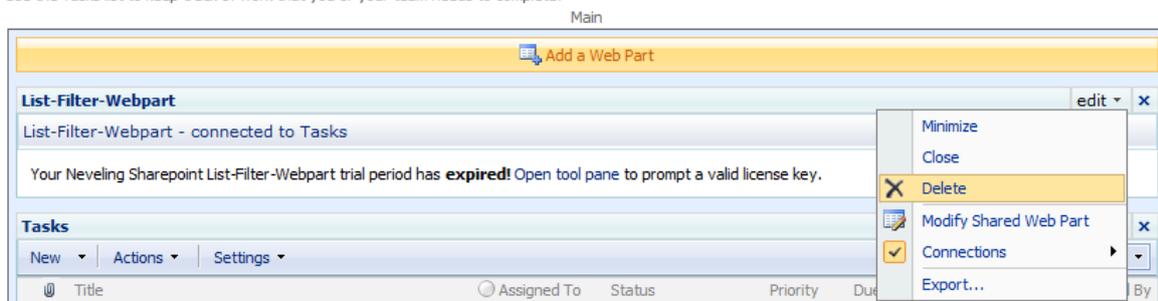
Open the **Site Actions** menu on the page from which you wish to remove List Filter Web Part and select **Edit Page**.



Select **Delete** in the **Edit** menu.

Tasks

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



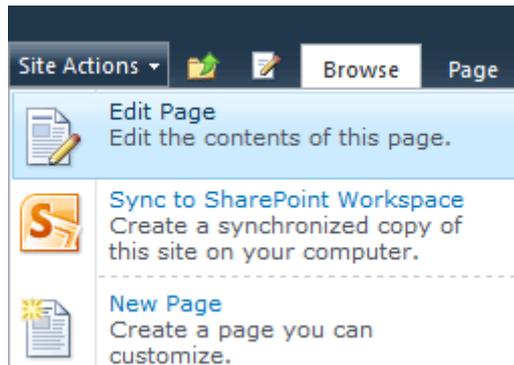
To completely deinstall List Filter Web Part from the site collection platform, follow the procedure in section 3.2.

3.5 Creating connections to a SharePoint list

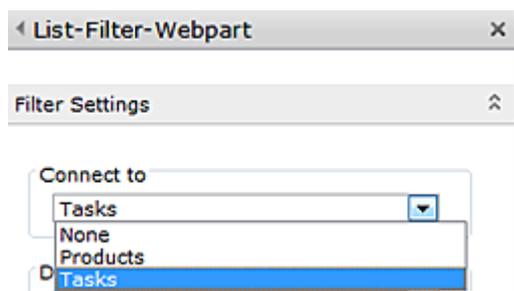
After you integrate List Filter Web Part as described in section 3.3, the following screen message will appear:

„This webpart is not connected to a Sharepoint list or the chosen consumer list or webpart is not supported. Open tool pane and connect the webpart. “

List Filter Web Part can only be connected to lists that are shown on the page. To do this, open the **Site Actions** menu and select **Edit Page**.



Open the Web Part configuration and select the list you would like to connect.

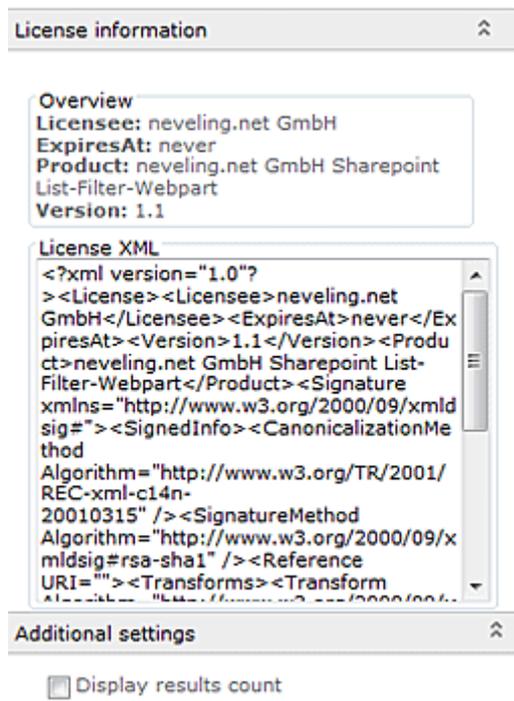


3.6 Entering the license key

In order to use List Filter Web Part, you must first enter a valid license key. To do this, click **Modify Shared Web Part** in the **Edit** menu.



Copy the contents of **the license.txt** file into the **License XML** field.



Important note:

Use a text editor such as Notepad or Wordpad to open the xml file so as to ensure that no other characters are inserted in the file, as would occur if you used an application such as Microsoft Internet Explorer to open the file.

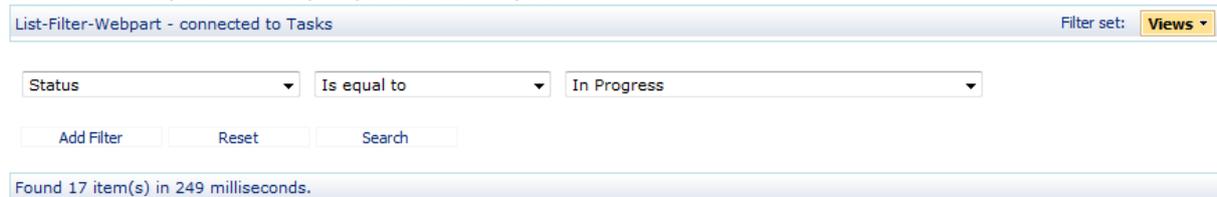
4 How to use List Filter Web Part

4.1 Application elements

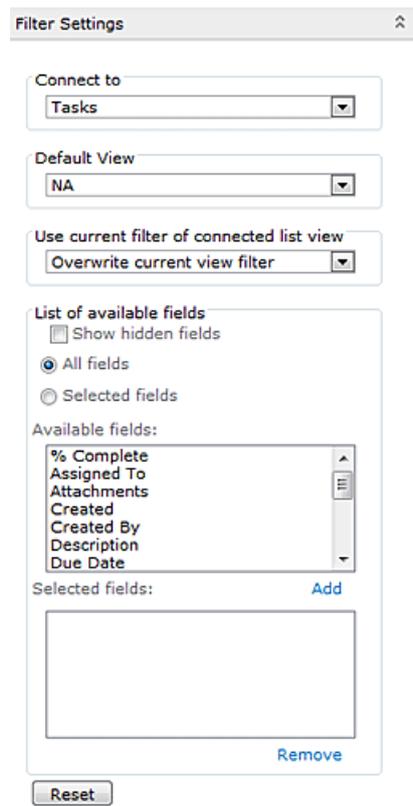
List Filter Web Part is very easy to use. In the selection field on the left, you define which list field you wish to filter. In the middle field you define the filtering criteria. And in the field on the far right, you enter the actual search term.

Tasks

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



The screenshot shows the List Filter Web Part interface. At the top, it says "List-Filter-Webpart - connected to Tasks" and "Filter set: Views". Below this, there are three dropdown menus: "Status", "Is equal to", and "In Progress". There are also buttons for "Add Filter", "Reset", and "Search". Below the filters, it says "Found 17 item(s) in 249 milliseconds."



The screenshot shows the Filter Settings panel. It has a title "Filter Settings" with an expand/collapse arrow. Below the title, there are several sections: "Connect to" with a dropdown menu set to "Tasks"; "Default View" with a dropdown menu set to "NA"; "Use current filter of connected list view" with a dropdown menu set to "Overwrite current view filter"; "List of available fields" with a checkbox for "Show hidden fields" (unchecked), radio buttons for "All fields" (selected) and "Selected fields"; "Available fields:" with a list box containing "% Complete", "Assigned To", "Attachments", "Created", "Created By", "Description", and "Due Date"; "Selected fields:" with an empty list box and an "Add" button; and a "Reset" button at the bottom.

List Filter Web Part automatically reads out the fields in the connected lists and makes them available to you in a selection list. You can define which fields should be available for the users by choosing them in the Webpart configuration.

If you would like to limit the available fields, choose "Selected fields" in the Webpart Settings section. Mark the fields you would like to add and click on "Add" below the list of the available fields. Save your selection with "Ok" or "Apply" at the bottom of the page.

To remove previously added fields select them in the "Selected fields"-list and click "Remove".

It is also possible to show hidden fields. This is only possible if the "Selected fields" option is not enabled. If the "Show hidden fields" option is enabled the Webpart searches within these fields if you choose "All Fields" as well.

All options supported by SharePoint can be used as filter criteria.

Tasks

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

List-Filter-Webpart - connected to Tasks

Any field	Is equal to	
Any field	Is equal to	
Any view field	Contains	
AssignedTo	Begins with	
Attachments	Is not equal to	
Author	Is greater than	
Body	Is less than	
ContentType	Is greater than or equal to	
Created	Is less than or equal to	
DueDate		
Editor		
File_x0020_Type		
InstanceID		
Kunde		
Modified		
Order		
owshiddenversion		
PercentComplete		
Priority		
StartDate		
Status		
TaskGroup		
Title		
WorkflowVersion		

View: **All Tasks**

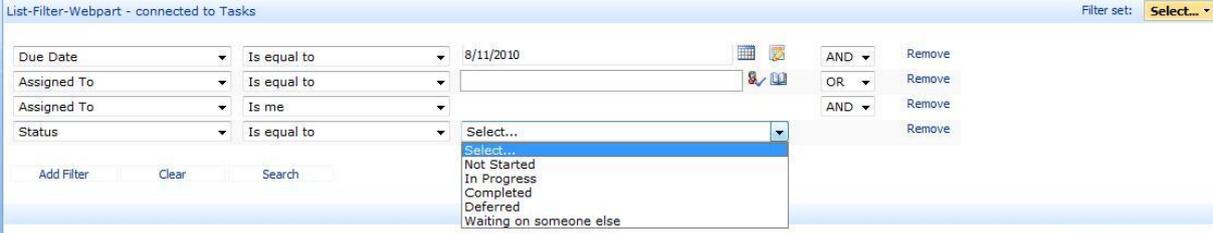
Due Date % Complete Created By

4.2 Supported field types

The following types of fields are supported:

- Single line of text
- Multiple lines of text
- Choice
- Multiple Choice
- Boolean
- Integer
- Date and Time
- Currency
- Lookup
- Number
- Calculated
- Attachments
- Person or Group
- All Day Event
- Count
- File

The filter entry field changes according to the type of column selected. For example, if you select a date field the Date Picker appears. If you select a field containing a team member, the People Picker appears (only available for authenticated users).



The screenshot shows the 'List-Filter-Webpart - connected to Tasks' interface. It features a 'Filter set:' dropdown menu set to 'Select...'. Below this, there are three filter entries:

- Field: 'Due Date', Operator: 'Is equal to', Value: '8/11/2010'. A date picker icon is visible next to the value.
- Field: 'Assigned To', Operator: 'Is equal to', Value: (empty). A people picker icon is visible next to the value.
- Field: 'Assigned To', Operator: 'Is me', Value: (empty).
- Field: 'Status', Operator: 'Is equal to', Value: 'Select...'. A dropdown menu is open, showing options: 'Select...', 'Not Started', 'In Progress', 'Completed', 'Deferred', and 'Waiting on someone else'.

Each filter entry has a logical operator dropdown (AND, OR, AND) and a 'Remove' button. At the bottom left, there are buttons for 'Add Filter', 'Clear', and 'Search'.

Field type	Filter criteria	Entry field
Choice or Multiple Choice, Lookup	Is equal to, Is not equal to	Drop-down list containing the choice values for the field
	Contains, Begins with	Text box
Person or Group	Is equal to, Is not equal to	People Picker with the selection menu for SharePoint Site Collection users (only available for authenticated users).
	Contains, Begins with	Text box
	Is me, Is not me	No Entry field. The Criteria will be used as search value.
Date and Time	Any	Date Picker with the calendar pop-up to select a date (time is not taken into consideration) and a toggle button to switch to the placeholder text box.
Boolean / Yes – No / Attachements, All Day Event	Any	Drop-down list containing Yes and No
Other		Text box

In addition to the option to use the list filter for specific columns, you can also define a filter for any field by selecting **Any Field**, or define a filter for all fields in the current view by selecting **Any field in current view**.

4.3 Available filter criteria

The following filter criteria are available. These criteria are the standard SharePoint filters.

- Is equal to
- Contains
- Begins with
- Is not equal to
- Is greater than
- Is less than
- Is greater than or equal to
- Is less than or equal to

Not all filter conditions can be used with all types of fields. Combinations that are not allowed are filtered prior to the search. For example, it is not possible to filter a field of type "Boolean" with the criteria "Is greater than".

4.4 Filter entry validation

Search entries are not case sensitive. Thus for example, all list entries that begin with ProjectN will be displayed if "projectn" is entered.

Prior to the filtering process, List Filter Web Part checks the validity of search field entries. For example, if an invalid number is entered in the **Currency** field, this filter will be disregarded for the search and an error message will be displayed.



The screenshot shows the List Filter Webpart interface for a 'Tasks' list. The breadcrumb path is 'neveling.net Teamsite > Tasks'. The title is 'Tasks' with a subtitle 'Use the Tasks list to keep track of work that you or your team needs to complete.' The webpart is identified as 'List-Filter-Webpart - connected to Tasks' and the filter set is 'Select...'. A filter is applied to the '% Complete' field with the criteria 'Is equal to' and the value 'Test'. Below the filter are buttons for 'Add Filter', 'Reset', and 'Search'. A red information icon is present next to the filter value. A validation error message is displayed in a box: 'Selected field type accept only float or integer value. This filter will not be considered.'

4.5 Filter interconnection

You can interconnect an unlimited number of filters using the **Add Filter** option and the AND or OR operators.



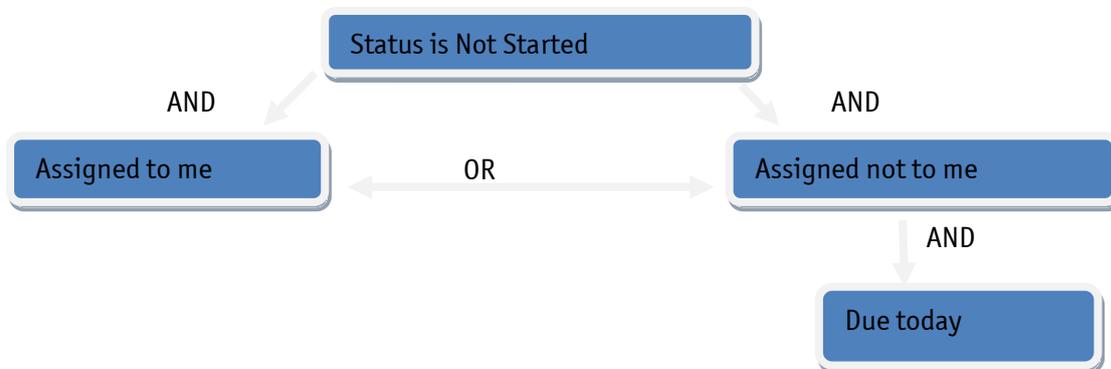
You can remove a filter via **Remove**, providing that at least one filter is available.

The first filter option in figure above would state as follows if it were fully verbalized:

Show all list entries in which the value of the field "Due Date" is equal to "[Today]" (equates to the actual day).

The OR operator refers to the next filter. If there is more than one filter option, these operators apply from bottom to top. Hence the complete filter in the screenshot would state as follows if it were fully verbalized:

Show all list entries with the Status "Not Started" (Status Is equal to Not Started) and those assigned to the actual user (Assigned To Is me). And show all list entries with the Status "Not Started" those not assigned to the actual user (Assigned To Is not me) and those are due the actual day (Due Date Is equal to [Today]).



4.6 Searches for multiple values

Unlike integrated SharePoint filtering, List Filter Web Part allows you to filter for multiple values within a text field.

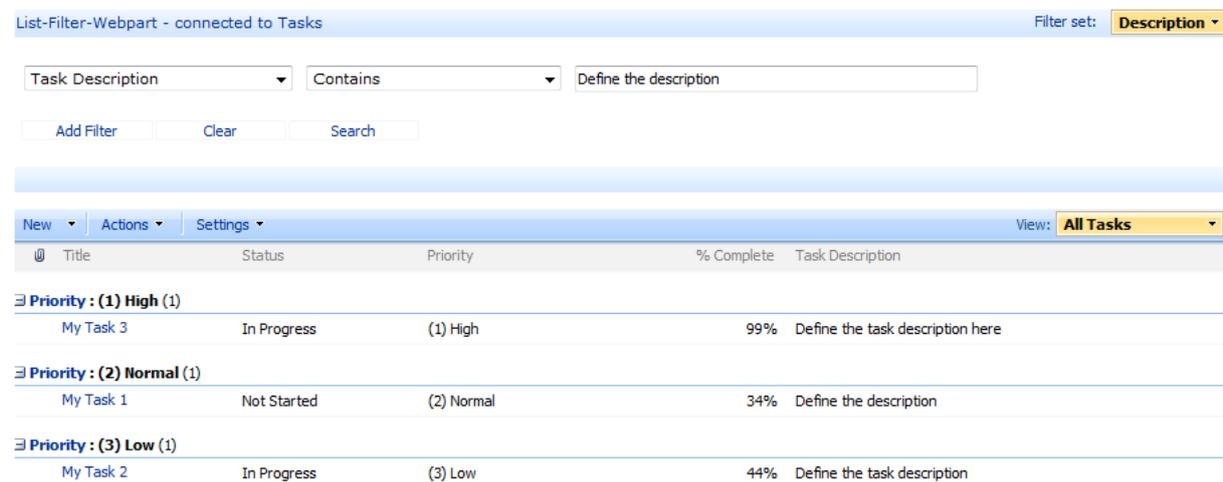
To do this, you simply separate the values with a line space. There are two different modes for searching using multiple values. Both modes concatenate each search value with the operator “AND”.

4.6.1 Simple concatenation



List-Filter-Webpart - connected to Tasks Filter set: **Select...**

Due Date	Is equal to	[Today]	AND	Remove
Assigned To	Is not me		OR	Remove
Assigned To	Is me		AND	Remove
Status	Is equal to	Not Started		Remove



List-Filter-Webpart - connected to Tasks Filter set: **Description**

Task Description

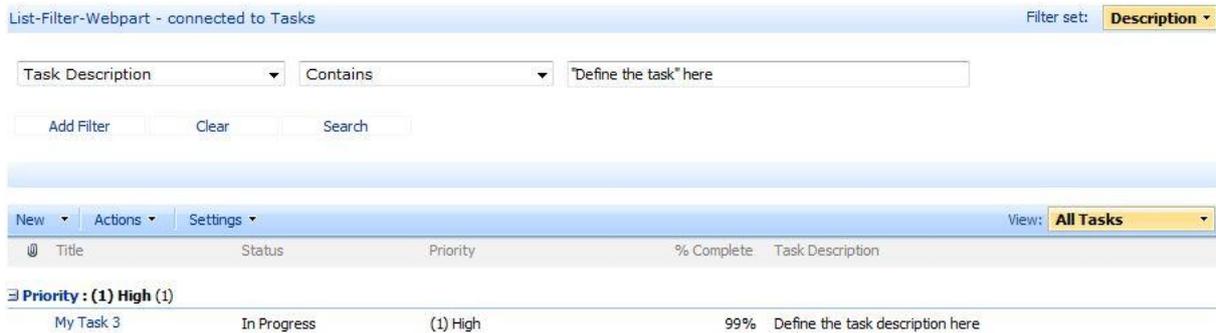
New Settings View: **All Tasks**

Title	Status	Priority	% Complete	Task Description
Priority : (1) High (1)				
My Task 3	In Progress	(1) High	99%	Define the task description here
Priority : (2) Normal (1)				
My Task 1	Not Started	(2) Normal	34%	Define the description
Priority : (3) Low (1)				
My Task 2	In Progress	(3) Low	44%	Define the task description

This filter relates to all list entries where the field “Task Description” contains “Define”, “the” and “description”.

The order of these values is not relevant. The search values - *Description define the* - would display the same result.

4.6.2 Conditionally Concaternation



This mode connects multiple values to one term and additional link it with values. The search above displays items where the field “Task Description” contains the term “Define the task” and the search value “here”.

The webpart interprets search values within quotation marks as one term. The above filter – Task Description Contains “Defined the task” – is equal to – Task Description Is equal to Define the task -.

All search values will be processed as one search term after changing the criteria “Contains” to “Is equal to” (or “Begins with”). In this case the list showing any item in which die field value of the field “Task Description” is “Define the task” (or the field value starts with).

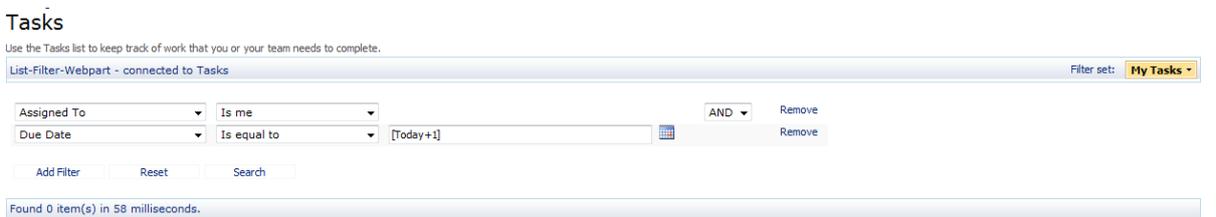
4.7 Searches using placeholders

List Filter Web Part supports various placeholders that are mainly useful in connection with stored filter settings and that can be used with **Person Or Group** and **Date & Time** fields.

For person fields, the placeholders **Is me** and **Is not me** are currently supported. **Is me** refers to the user that is conducting the search, whereas **Is not me** refers to all other users. To use this placeholders, the user has to login into the teamsite.

Date & Time fields support the **Today** placeholder, which as its name implies refers to the current day. Enter the [Today] string in the date or time field (use the square brackets). You can also define a period prior to or after today by entering [Today+x] or [Today-x].

The following filter set shows the current user the tasks that he needs to complete by tomorrow.



4.8 On the fly search logic

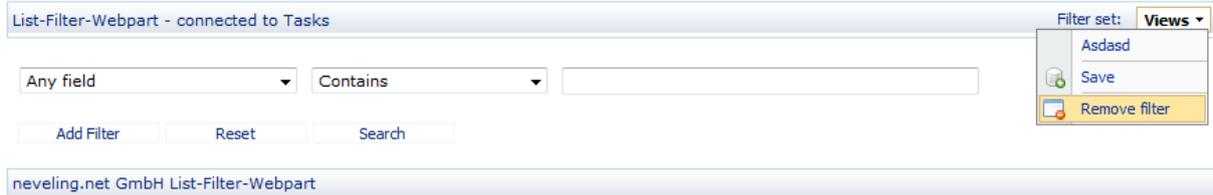
List Filter Web Part integrates an automatic search logic. For example, if a filter is removed, a new search query is launched using the remaining filters and the task is updated.

4.9 Search query deletion

To delete the current filter options (in the third column) click **Reset**. To redefine all filter settings, click **Remove Filter**.

Tasks

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



The screenshot shows the 'List-Filter-Webpart - connected to Tasks' interface. It features a search filter configuration area with the following elements:

- A header bar: "List-Filter-Webpart - connected to Tasks" with a "Filter set: Views" dropdown menu.
- Search criteria: A dropdown menu set to "Any field", a dropdown menu set to "Contains", and an empty text input field.
- Buttons: "Add Filter", "Reset", and "Search".
- Context bar: "neveling.net GmbH List-Filter-Webpart".
- Filter menu: A dropdown menu with options "Asdasd", "Save", and "Remove filter".

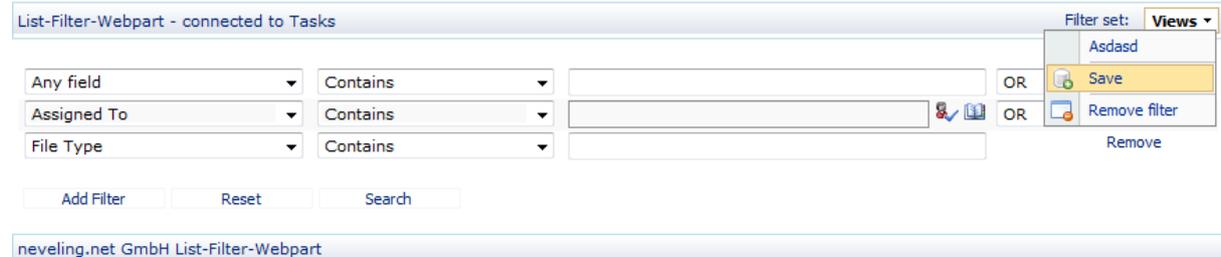
4.10 Search query archiving

You can archive current filter settings so that you don't have to re-create them and so as to make them available to other users.

To do this, select **Save** in the Filter Set menu.

Tasks

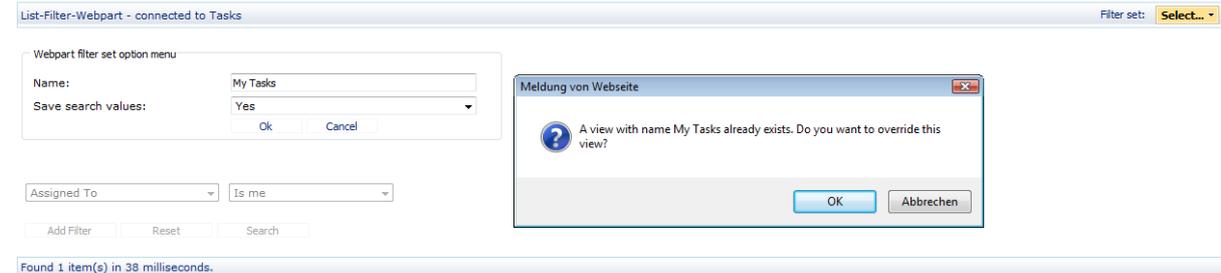
Use the Tasks list to keep track of work that you or your team needs to complete.



A dialog will then open where you can name and save the filter settings. You can also save the search field values.

Tasks

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



If you enter an existing name, a message will appear prompting you to overwrite the existing view.

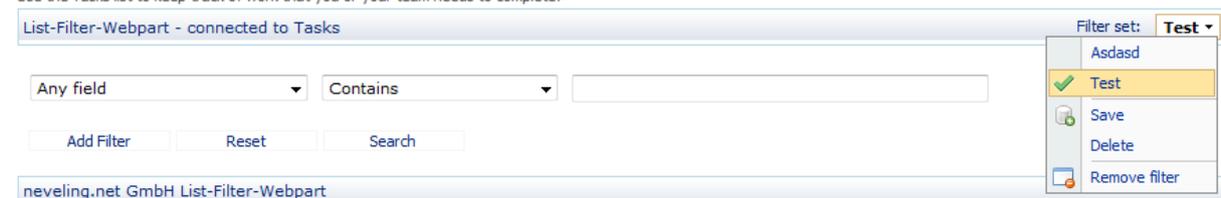
Note: Saving search queries is only available for authenticated users, which are in a group with write access.

4.11 Loading archived filter sets

To load an archived filter set, select from the Filter Set menu the name of the archived filter set you wish to load.

Tasks

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



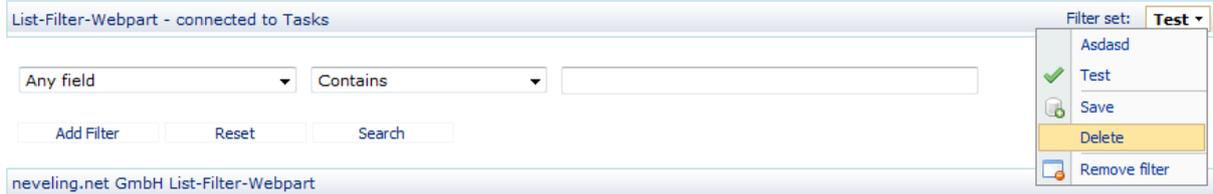
Note: Loading previously saved search queries is only available for authenticated users.

4.12 Deleting archived filter sets

To delete an archived filter set, select from the **Delete** menu the name of the archived filter set you wish to delete.

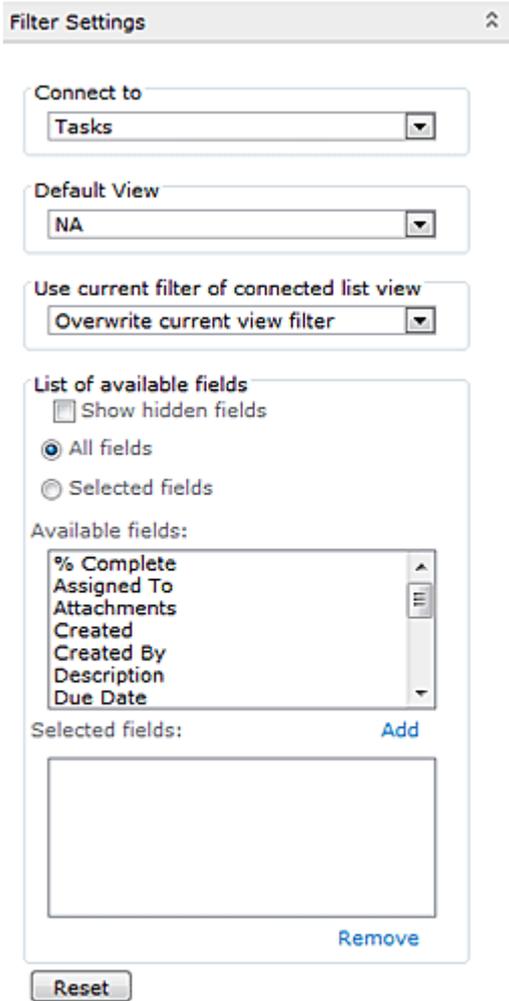
Tasks

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



Note: Deleting previously saved search queries is only available for authenticated users, which are in a group with write access.

4.13 Setting a standard filter set



A standard filter set can be chosen in the Webpart configuration. This one will be used automatically every time the page is loaded.

Select a previously saved filterset in the „Settings“ section and confirm using the “Apply“-Button.

You can also setup the interaction between the web part and a filter that might be defined in a SharePoint view. There are three options available:

Overwrite current view filter

A filter that is set up in the Sharepoint view will have no effect.

Combine both filters with "AND"

The Web Part only searches within the chosen Sarepoint view (default).

Combine both filters with "OR"

The list will showa results that fits either the Wep Part settings or the one from the Sharepoint view.

License information ^

Overview
Licensee: neveling.net GmbH
ExpiresAt: never
Product: neveling.net GmbH Sharepoint List-Filter-Webpart
Version: 1.1

License XML

```
<?xml version="1.0"?  
><License><Licensee>neveling.net  
GmbH</Licensee><ExpiresAt>never</Ex  
piresAt><Version>1.1</Version><Produ  
ct>neveling.net GmbH Sharepoint List-  
Filter-Webpart</Product><Signature  
xmlns="http://www.w3.org/2000/09/xmld  
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REC-xml-c14n-  
20010315" /><SignatureMethod  
Algorithm="http://www.w3.org/2000/09/x  
mldsig#rsa-sha1" /><Reference  
URI=""><Transforms><Transform
```

Additional settings ^

Display results count

Enabling the option “Display result count” will show a filter result toolbar after any succeed filtering.

Note: The page load time could be increased after activating this option.