



List Filter

Administrator Guide

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1. Introduction

The web part of the Vitextra List Filter makes it possible to filter data in lists and libraries of SharePoint documents.

The web part of the Vitextra List Filter is based on the Microsoft SharePoint platform and is compatible with SharePoint Foundation 2010/2013 and SharePoint Server 2010/2013/2016/2019.

This document contains all the necessary information for Vitextra List Filter installation, activation, and setup:

- Product description
- Product installation
- Component activation
- Frequently asked questions

2. Product description

Vitextra List Filter makes it possible to create filters for lists and libraries of SharePoint documents.

2.1 Support of AND/OR conditional operators

The List Filter supports selection between two modes for combining filter values:

- Displaying data that meet at least one of the selected criteria
- Displaying data that meet all the selected criteria

To select a mode, the Parameters dialog box of the List Filter web part is used (see Additional filter settings).

2.2 Various filter types

The List Filter makes it possible to create filter panels using 14 various control types:

Control	Description
Text	Text field for data filtering based on the specified value. During the filtering process, a column is checked if it contains the specified value. ¹
Text with parameters	A text field with an option to select one of the filter types: <ul style="list-style-type: none"> • contains • starts with • equal to • not equal to • greater than • greater than or equal to • less than • less than or equal to
Autocompletion	Text field for filtering. When a value is entered, the system automatically displays possible value variants from the selected column depending on the text entered by the user. ²
Date and time	Date selection.
Date range	Date range selection.

¹ Letter case is ignored during filtering. “Vitextra” and “VITEXTRA” filter values are considered the same.

² Possible values are searched for when at least three characters are entered in the filter field.

Users or groups	User or group selection.
users or groups (multiple values)	Selecting a single or several user(s)/group(s)
Yes/No	Selecting one of the following values: <ul style="list-style-type: none"> • All • Empty • Yes • No
Dropdown menu	A dropdown list with unique value variants contained in the specified field.
Dropdown menu (multiple values)	A dropdown list with unique value variants contained in the specified field with an option to select a single or multiple values.
Slider	Selecting a numeric values by moving the slider. ³
Slider (Range)	Selecting a range of values by moving the slider. ⁴
Term	Selecting a taxonomy term.
Term (multiple values)	Selecting a single or several taxonomy term(s)

2.3 Data export to Excel

The List Filter makes it possible to export the list data to a Microsoft Excel file. During export, an Excel table is created based on the respective representation of the document list/library.

2.4 Configurable field titles

The List Filter makes it possible to change filter titles on the filter panel. By default, titles are the same as titles of the respective columns of the document list/library.

³ The minimum and the maximum values are calculated automatically based on the document list/library data.

⁴ The minimum and the maximum values are calculated automatically based on the document list/library data.

2.5 Diacritical mark support

The List Filter supports automatic creation of value variations that contain diacritical marks. For example, if the filter's value is "progrès," data meeting both "progrès" and "progres" values will be displayed.

2.6 Hiding data prior to filtering

The List Filter supports hiding data of the document list/library representation before the user applies filtering explicitly.

2.7 Mandatory fields

When configuring fields of the filtering panel, you can make one or several fields mandatory to complete.

If at least one field is mandatory, data will not be filtered until all the filter's mandatory fields have the respective values.

3. Installation

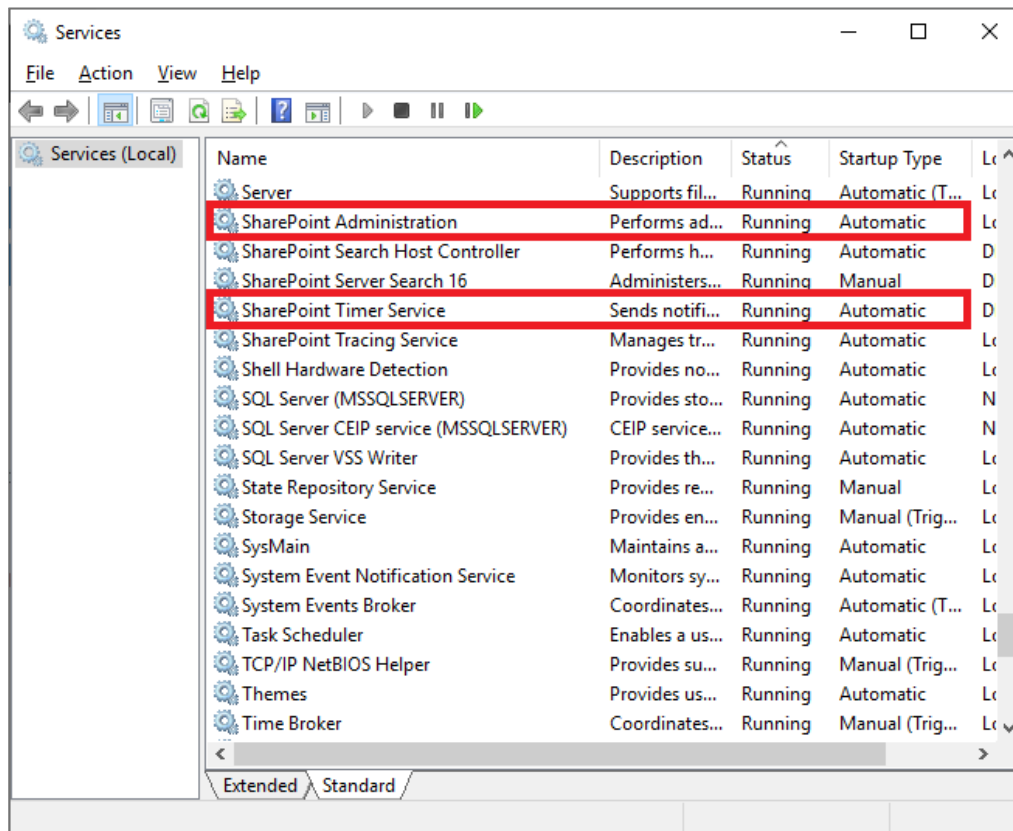
3.1 Installer

On the product download page (<https://vitextra.com/en/downloads>), download the respective installer and save it to one of the web servers of your SharePoint farm.⁵

3.2 SharePoint services

Before installation, make sure that the following Windows services are started and running on the SharePoint web server where you want to install the List Filter:

- SharePoint Administration
- SharePoint Timer Service



3.3 Required permissions

To install the List Filter, you need the following rights and permissions:

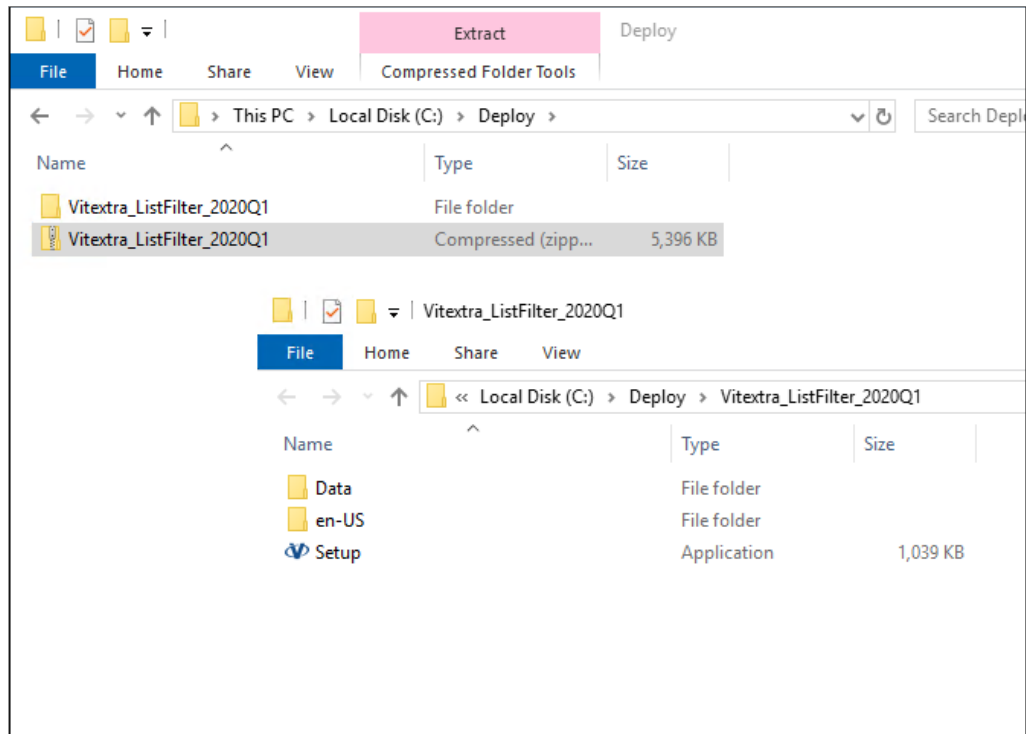
- Membership in the local administrator group

⁵ Vitextra installers are compatible with the following SharePoint versions: 2013, 2016, 2019.

- Membership in the SharePoint farm administrator group

3.4 Vitextra product installer

Unpack the installer and run Setup.exe⁶

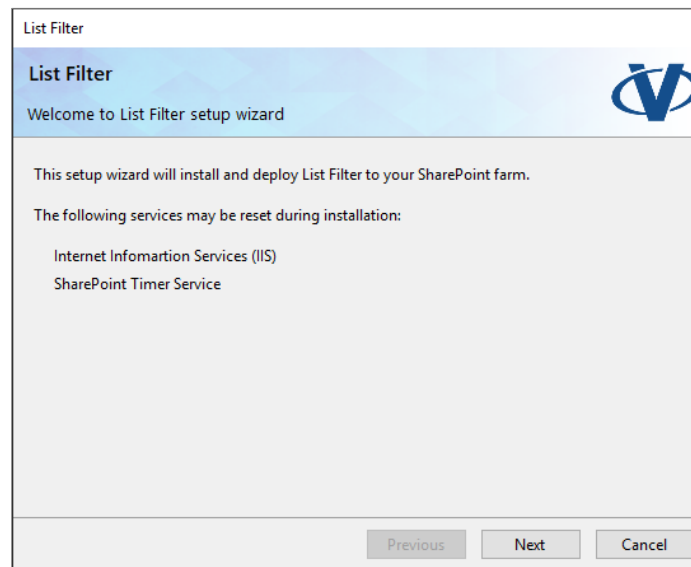


Note

If you have failed to run Setup.exe, right-click on it and select **Run as Administrator** in the context menu.

Once the installer has been started, the greeting screen appears.

⁶ The Vitextra product installer is not localized and supports English only.

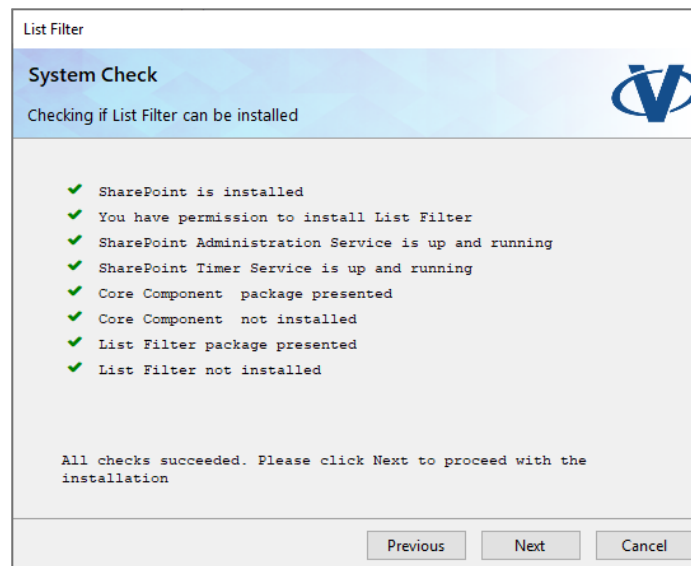


Click **Next** to start the system and installer check process.

Note

Most often, you can just click **Next** when installing Vitextra products to accept default settings.

Once the system is checked, click **Next**.



Read carefully and accept the terms of the end-user license agreement. Then, click **Next**.



List Filter

End-User License Agreement

Please read the following license agreement carefully

End-User License Agreement ("Agreement")
Please read this End-User License Agreement ("Agreement") carefully before clicking the "I Agree" button, downloading or using the software ("Application").

By clicking the "I Agree" button, downloading or using the Application, you are agreeing to be bound by the terms and conditions of this Agreement.

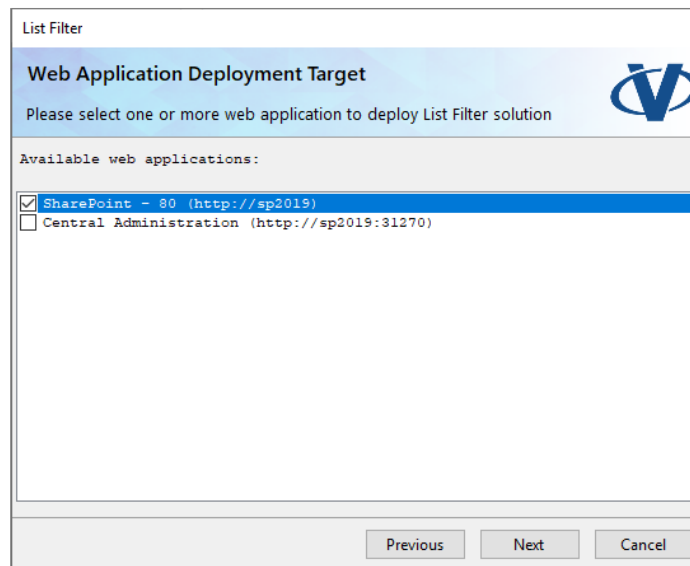
This Agreement is a legal agreement between you (either an individual or a single entity) and Vitextra SIA and it governs your use of the Application made available to you by Vitextra SIA.

If you do not agree to the terms of this Agreement, do not click on the "I Agree" button and do not download or use the Application.

I accept the terms in the License Agreement

Previous Next Cancel

Select the SharePoint web applications where you want to install the List Filter and click Next to start the installation.



List Filter

Web Application Deployment Target

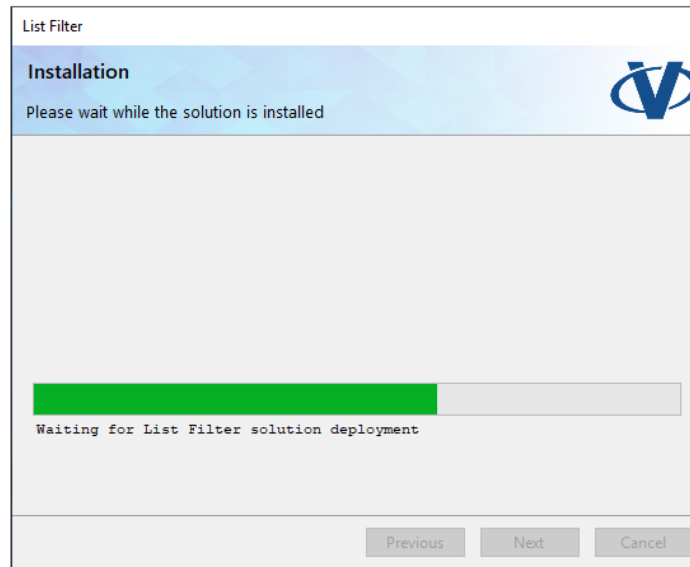
Please select one or more web application to deploy List Filter solution

Available web applications:

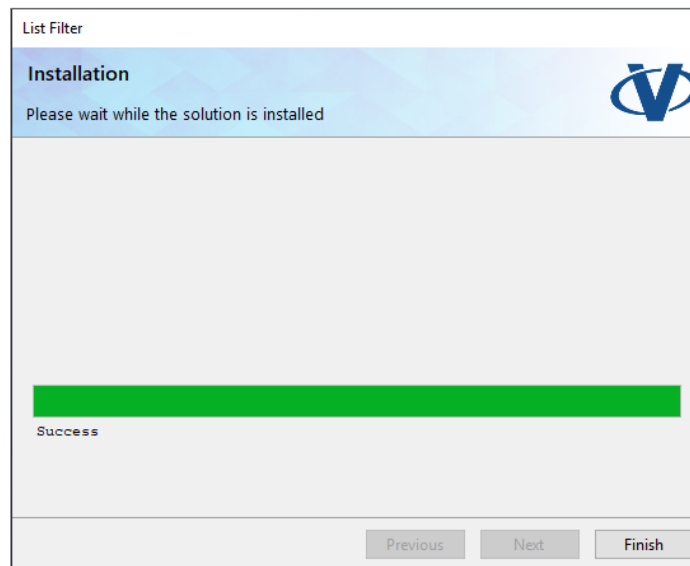
- SharePoint - 80 (http://sp2019)
- Central Administration (http://sp2019:31270)

Previous Next Cancel

Wait until the installation is complete.



Once the installation has been completed, click Finish to close the product installer.



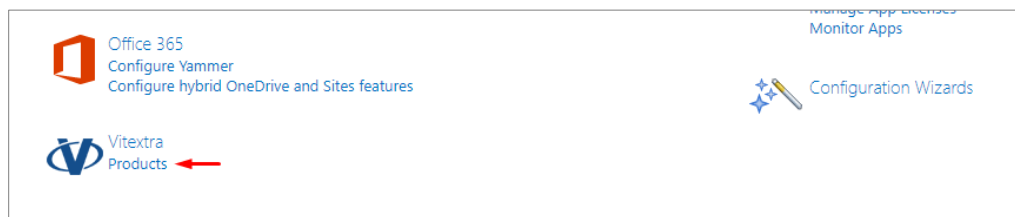
4. Product activation

Open the [My Products](#) page on the vitextra.com website and sign in to view the list of your purchased products and their activation keys.

Key	Activated	Farm ID
061511-4086F-9410F-F208B-82327	12/7/2019	ca5df4dd-9dcb-4c67-9768-58cc48aeacc4
061511-4086F-9410F-F208B-82327	12/13/2019	ba3dae1d-d7cd-41ea-ba33-7c51a4f5753c
061511-4086F-9410F-F208B-82327	1/17/2020	ba3dae1d-d7cd-41ea-ba33-7c51a4f5753c
061511-4086F-9410F-F208B-82327		
061511-4086F-9410F-F208B-82327		
061511-4086F-9410F-F208B-82327		
061511-4086F-9410F-F208B-82327		
061511-4086F-9410F-F208B-82327		
061511-4086F-9410F-F208B-82327		

Copy any of the List Filter product keys that has not been activated yet.

Open the SharePoint Admin Center and click on the **Products** link in the Vitextra section.



Select List Filter in the list of installed products:

Product	Version	Release	Status	Expired
Document Auto Title	1.0.0.0	2020Q1	Trial	1/27/2020
List Filter	5.2.0.0	2020Q2	Trial	1/24/2020
Quick Filter	1.1.0.0	2020Q1	Trial	1/27/2020

Paste the copied key in the **Product Key** field and click **Activate**:

List Filter

Status	Trial
Product Key Type in the 25 character license key for the new license	Key: <input type="text" value="3BNCl-R9362-NPC11-Y1LTH-ZTKCT"/>
Offline Activation	<input type="checkbox"/> Activate offline

If activation has been successful, the product status will be automatically changed to **Activated**.

List Filter

Status	Activated This product is already activated. No action required.
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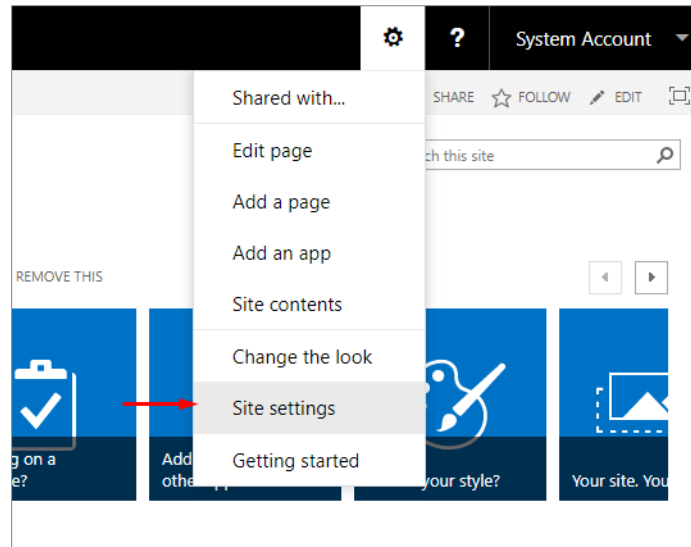
5. List Filter setup

5.1 Site collection features activation

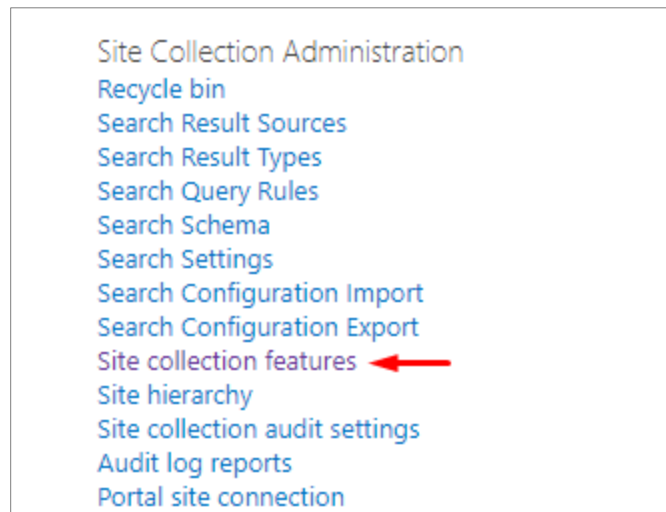
Before using the List Filter, you need to activate the following site collection features.

Open the SharePoint website where you want to use the List Filter.

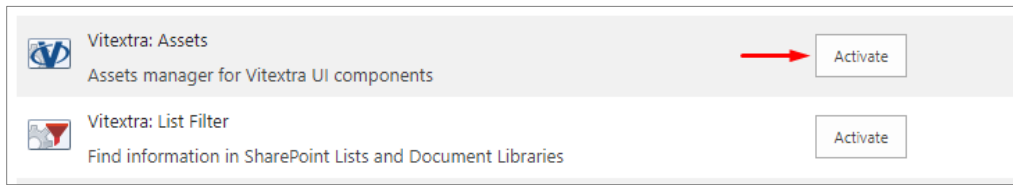
Go to site settings (**Settings – Site Settings**):



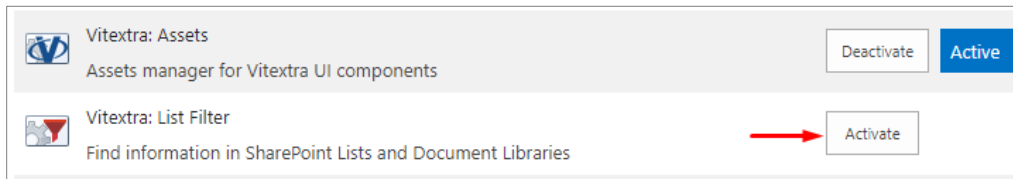
On the Site Settings page, click on the **Site Collection Features** link in the **Site Collection Administration** section:



All Vitextra visual components use shared resources contained in the following feature: **Vitextra: Assets**. If this site collection feature is not activated, click **Activate**:



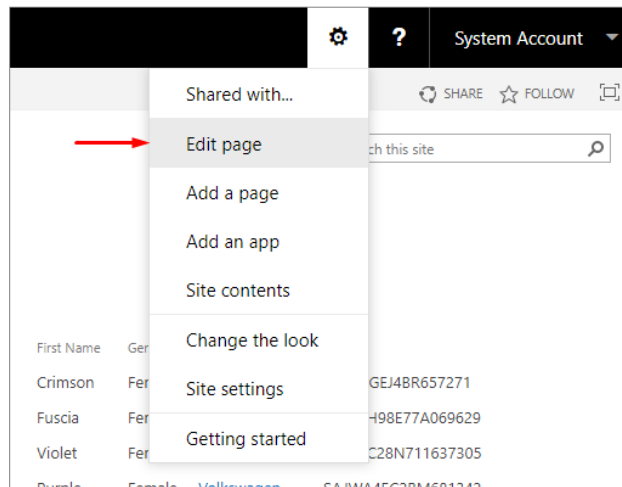
To activate the List Filter, click **Activate** next to **Vitextra: List Filter**:



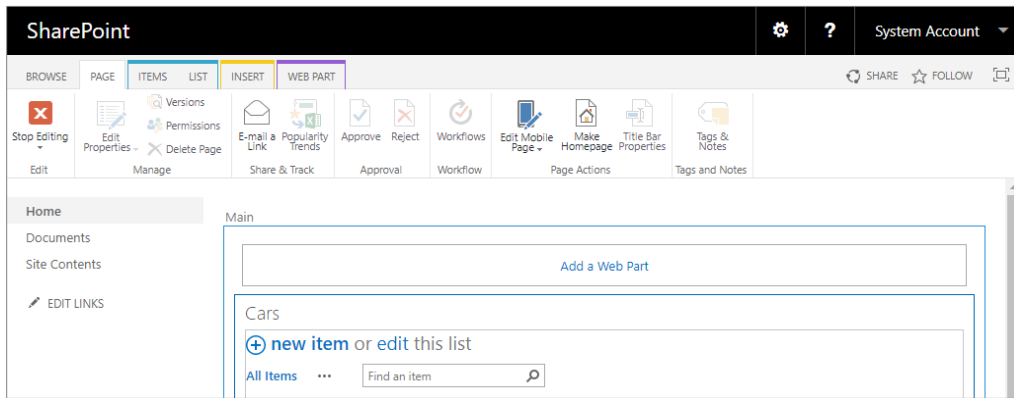
5.2 Adding the web part to a page

Go to the page where you want to add the List Filter web part to. You can use any website page, including a page of the list or library document representation.

Enter the edit page mode **Settings – Edit Page**):



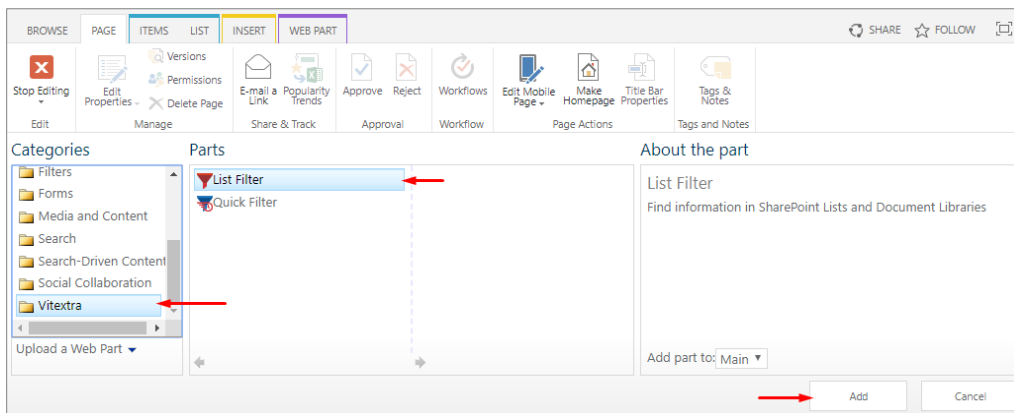
Click **Add Web Part** to open the web part selection dialog:



Note

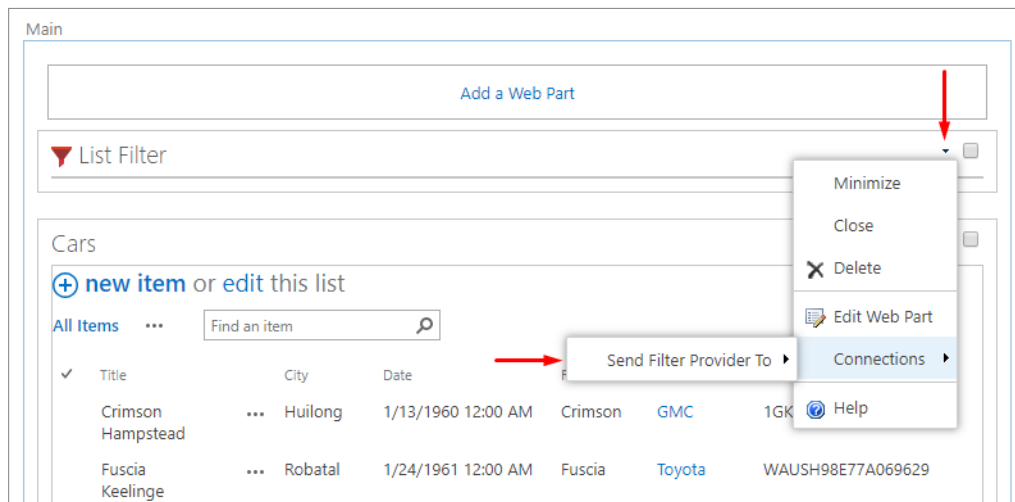
If you are adding the List Filter web part to a wiki page, open the web part selection dialog by positioning the cursor at the location where you want the web part to be added to, and click **Insert – Web Part** on the ribbon.

On the web part addition panel, select the **Vitextra** category, select **List Filter** in the list of web parts, and click **Add**:

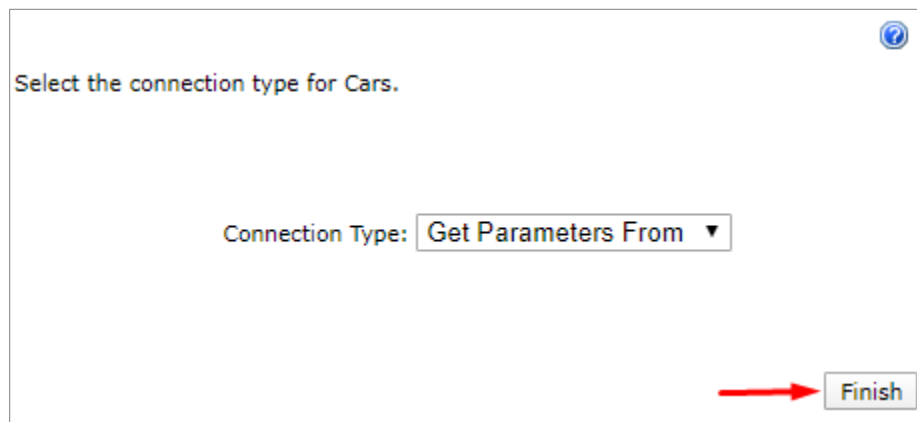


5.3 List Filter connection to a list/library

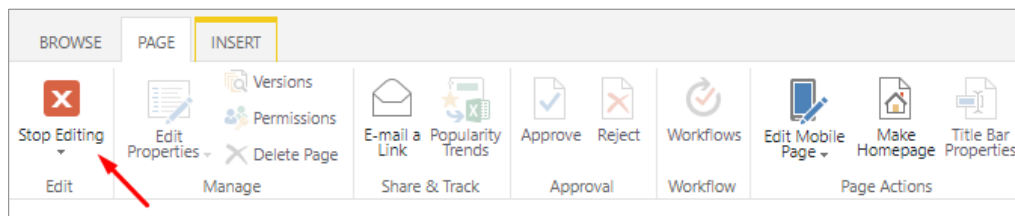
To use the List Filter, you need to connect it to a web part of the document list or library representation. For this purpose, select **Connections – Send Filter Provider to** in the context menu and select the web part name which data should be filtered:



Click **Finish** in the popup window:

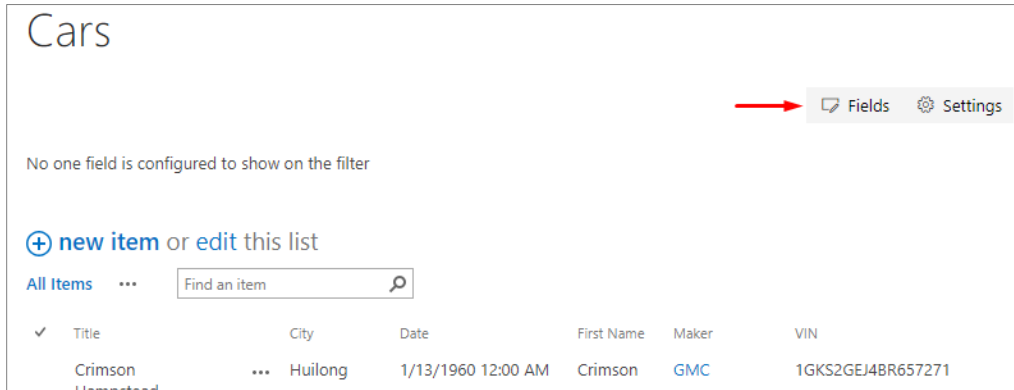


Exit the page edit mode by clicking **Stop Editing** in the toolbar.

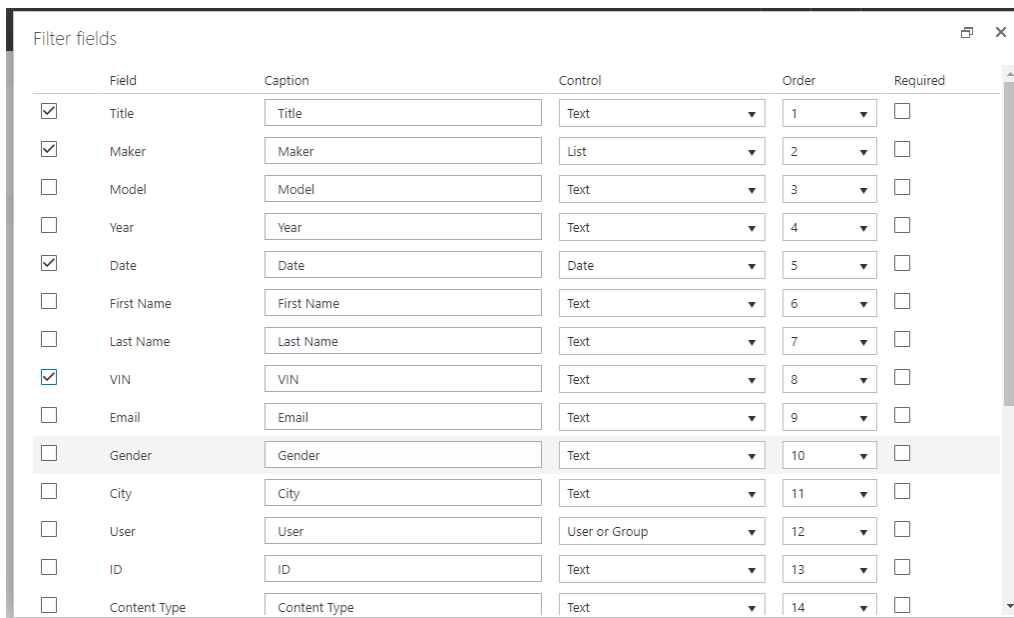


5.4 Selecting fields for filtering

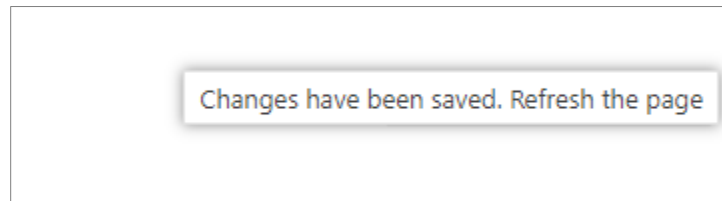
Open the field selection dialog by clicking **Fields**:



In the field selection dialog, specify the fields you want to be displayed in the filter panel, their display order, the filtering control, and other parameters.

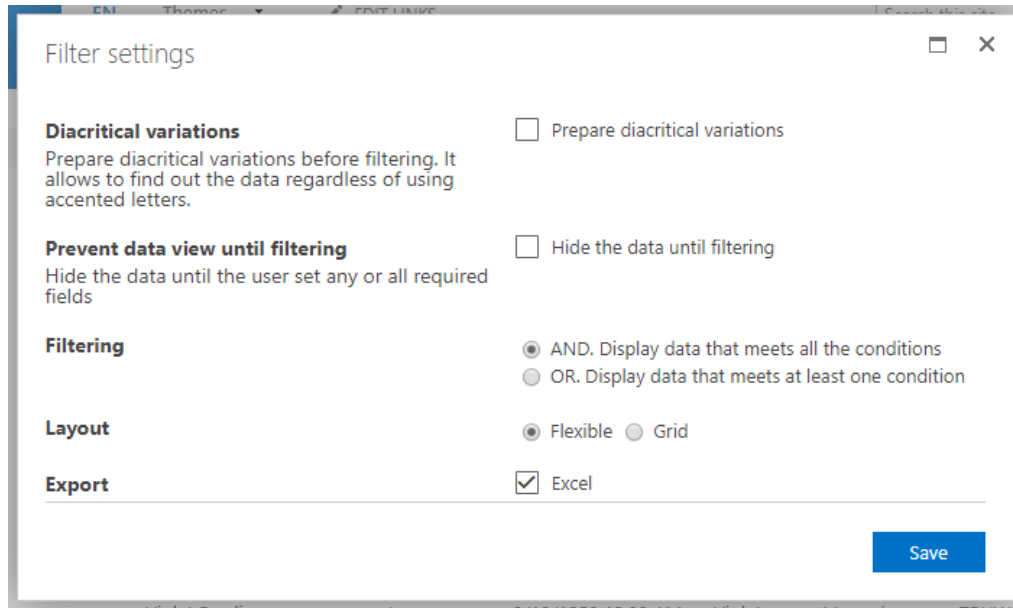


Click **Save** to close the column setup dialog.



After saving, refresh the page to view the changes.

5.5 Additional filter settings



Diacritical variations

Specify this parameter to automatically prepare diacritical text variations before filtering.

Hide data before filtering

Specify this parameter to hide data before specifying values of mandatory fields.

Filtering

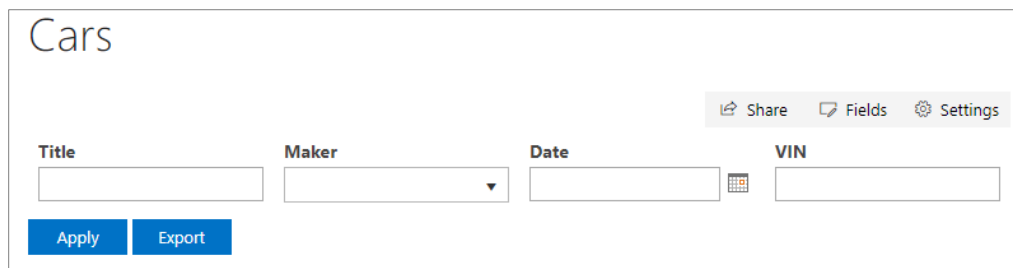
Select one of the available filter variants:

- AND. Display data meeting all the criteria
- OR. Display data meeting one of the criteria

Layout

The List Filter supports two variants of the filtering panel layout:

Flexible:



Grid:



When using the flexible layout, the filtering panel is more compact, and its size depends on the user screen width.

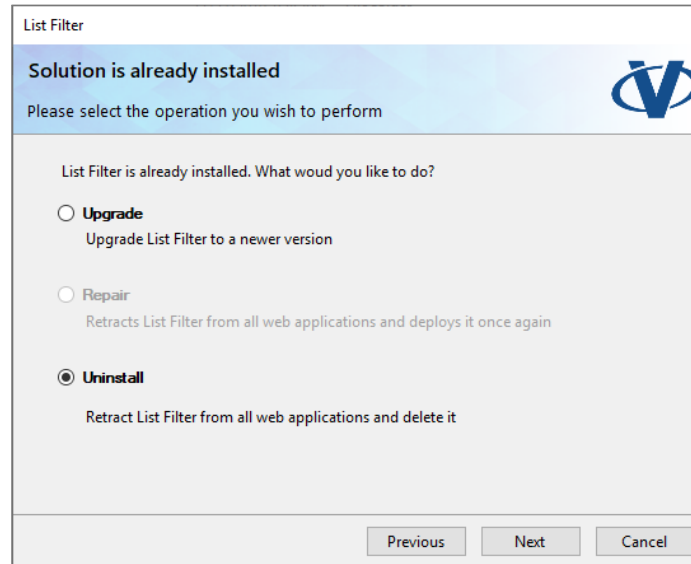
In the table layout, each control of the filtering panel is displayed in an individual line.

Export

Specify this parameter to allow export of filtering results to Microsoft Excel file.

6. Uninstalling

To uninstall the List Filter, run the Vitextra product installer and select **Uninstall**:



Click **Next** and wait until the deinstallation process is completed.

7. Frequently asked questions

Do you offer a trial period for the List Filter?

Yes. We offer free trial period of 14 days for each Vitetra product without any functionality limitations.

Which browsers does the List Filter support?

Vitetra products support the following browsers:

- Microsoft Edge
- Google Chrome
- Firefox
- Safari

Do I have to reinstall the List Filter to activate it?

No. Activation does not require reinstalling the product.

Do I have to reinstall the product when adding/removing servers from the SharePoint farm?

No. Each Vitetra product is activated on the farm level. It does not matter how many servers or users your farm has.

Do I have to activate the List Filter when migrating to new SharePoint versions?

You will have to activate the List Filter when changing the SharePoint farm identifier.