

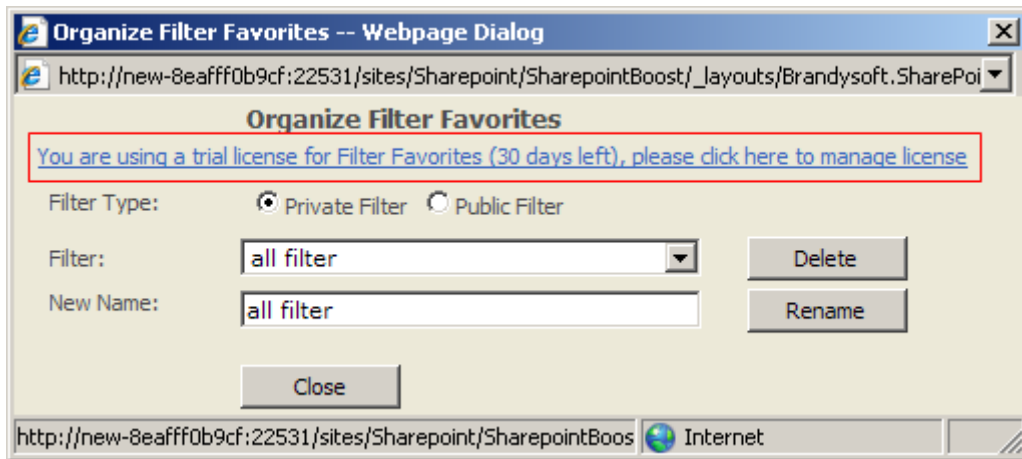
# SharePoint List Filter Favorites Installation Instruction

## System Requirements

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

## License Management

Click link in Organize Filter Favorites dialog to visit Filter Favorites license management page.



(Filter\_License\_link.jpg)SharePoint Filter Favorites License Management Link

After payment is successful, please send site collection ID to sales@sharepointboost.com so that we can generate license code for you.

## Filter Favorites License Management

License information and add new license

<b>Filter Favorites</b> Allow users to save and load filter (Powered by SharePointBoost)	License Information
	Farm ID: {1c64b1bc-e9a4-44b4-a0a3-6924200f8d44}
	Site Collection ID: ca135bdc-350c-4db7-89b3-88e36f29d1cd
	Current amount of users in this site collection: 9
	License status: No Registration
Add license(ASCII): <a href="#">Click here to get license</a>	

(Filter\_License\_Manager\_Page.jpg)(SharePoint Filter Favorites License Management)

Enter into the license code and click "OK".

# Filter Favorites License Management

License information and add new license

<b>Filter Favorites</b> Allow users to save and load filter (Powered by SharePointBoost)	License Information	
	Farm ID:	{1c64b1bc-e9a4-44b4-a0a3-6924200f8d44}
	Site Collection ID:	ca135bdc-350c-4db7-89b3-88e36f29d1cd
	Current amount of users in this site collection:	9
	License status:	50
	Add license(ASCII):	<a href="#">Click here to get license</a>

```
30283d55-24ed-42f2-85d7-671a17a578d3Igs/HIqKDxc1gF4/j1G5b7mX8YCYv2NEAbirv68Rjh1sNXSRhN6qVQ2k1ZX52PxkaZGF0bHcaVCYaFEVtKo8v1tQHhU2U6ONiidGu8yFhILY+6SEWogKgUwOuNAiJ54tMI6A6v4o+rqqvAXF/2hlpHME0r1sjYN/ubw3MoS4rQ=XttuN3KBatlfupwsb7ebS40AbCmTxftp9vDkbbqTfxy6mBPFzgKsw6qX+AJfIL7SKo/ctEVlghtKaoRRVwptLy6hD88WOV2a9cBYOQWQTmqpJ1Q5Y9VXD5x2E+762KsIar6W7e2LJmwxiE20G51rqv/jsgUiY25QhvnNneKkUAwdPuh302UN1pZm3do+pPoUP2ufjPiR18L/VG7K7dt8ivBelgNb7BZAZ1gY1NYDqCug7q33rgz2UEZcUmN3I5YYc3S4wi5Iwrrfmb91BE+9UBhmcs8zWmAeSII36IXLpPAGnk6i3EYCG8qCZ7vTJPhUqywWDcH/EFAv9KKFmz7tyooFai0knriKP08lQq+ayamQrrjE/xTR/46VOUmFXft1WlGpVU9lt6fxvPxAvu5AS0pgQYizbQZAC9gPVu9lt6fxsuEzkwD7NlYn7leVJOSOfulqpGLWxDy+YIPDiBvPbqQGT2eRqGoJGvIm2JN6IYU5NYKTYyIQk/FRVjvxRVHGRzxiEEcKAap+NNJE5cpzVabSVJaRPqDSmpZ/1PjZ15MAcwSbYtfgXnGJIRZMWhk2Z1Vx44Ap0JdW9hCmWV8nPknlPDK7LOUapvpLmPmsWFhA4E12bDOv8elzPnP+oL5BPFk12InoxFNWCKxH
```

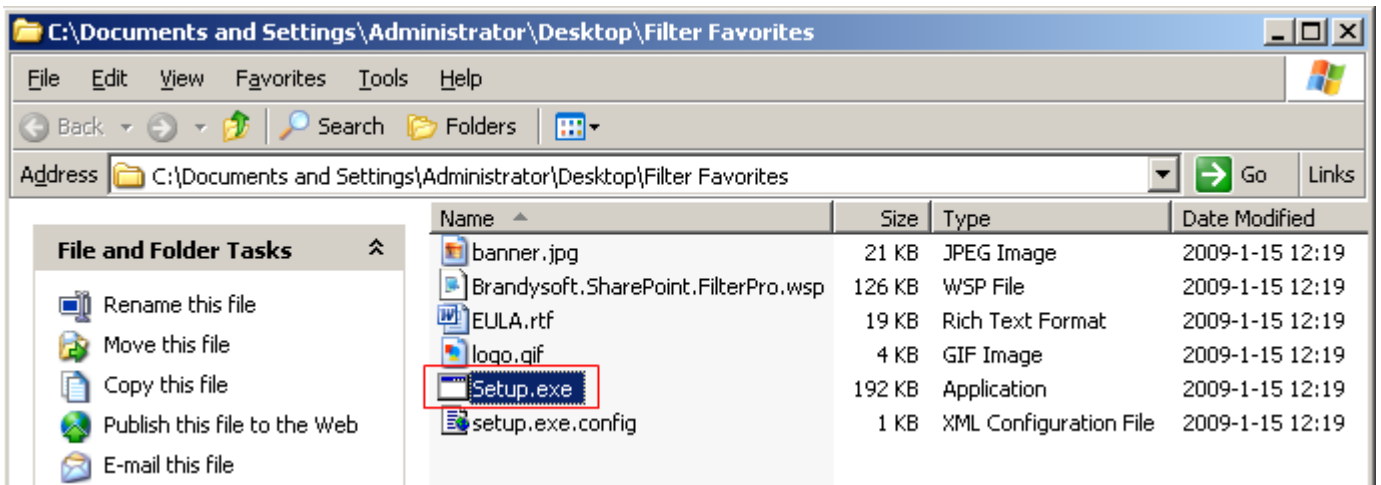
You license has been validated, Please switch to previous page and Refresh(F5) it

OK

(Filter\_Validated.jpg)(SharePoint Filter Favorites input license)

## Installation

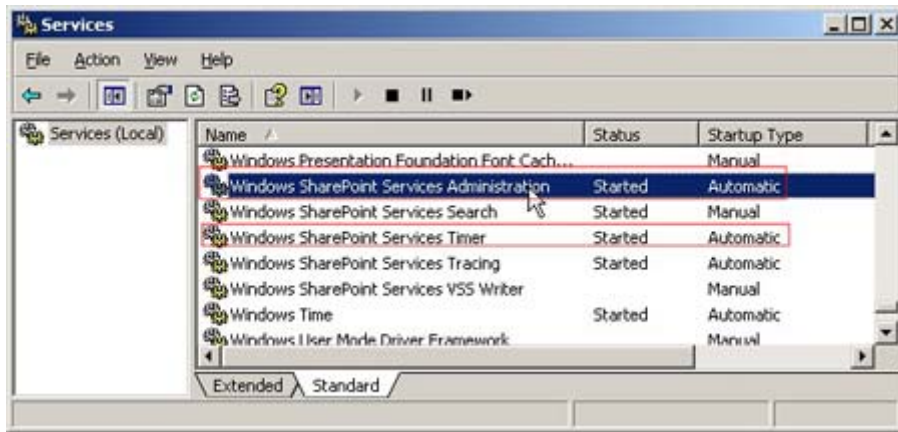
Download SharePoint Filter Favorites setup file from SharePointBoost website, release the file, and run "setup.exe".



(Setup\_File.jpg)run the "Setup.exe" file to install SharePoint Filter Favorites

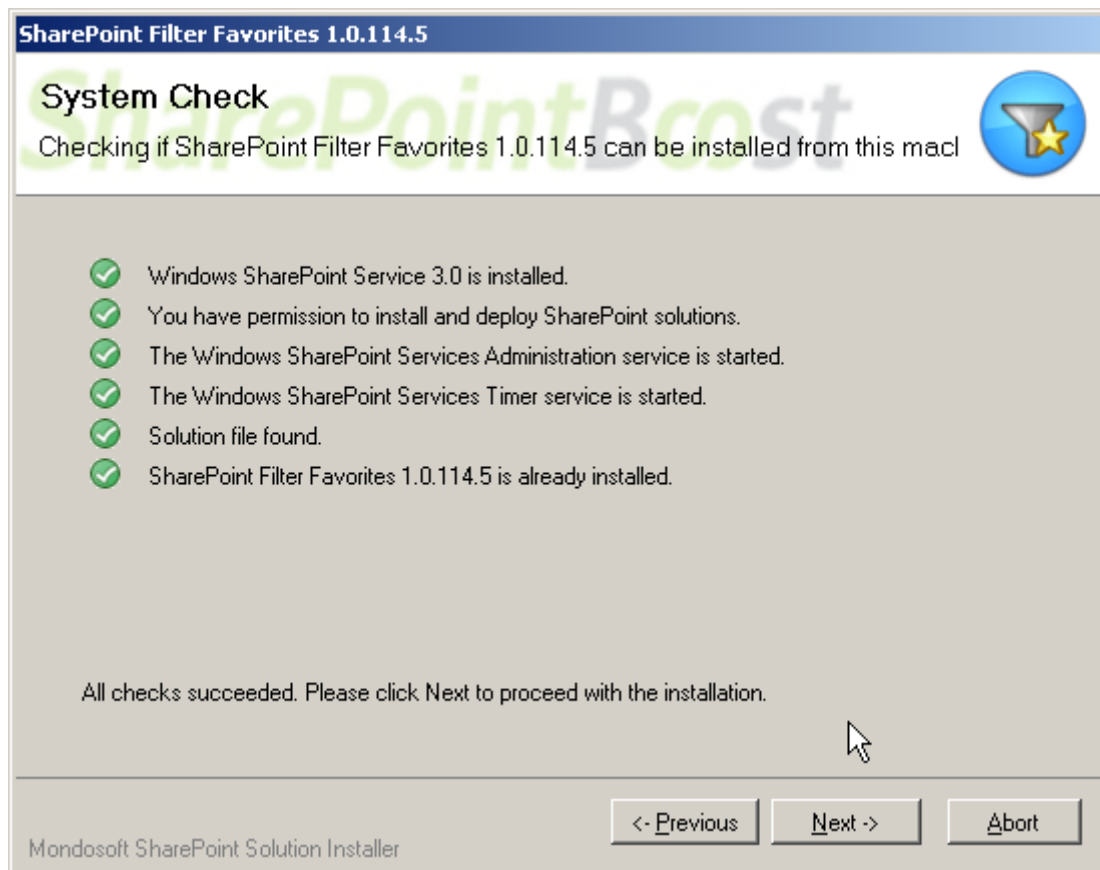
## Note:

You must be SharePoint Farm Administrator and start "Windows SharePoint Services Administration" and "Windows SharePoint Services Timer" in services management.



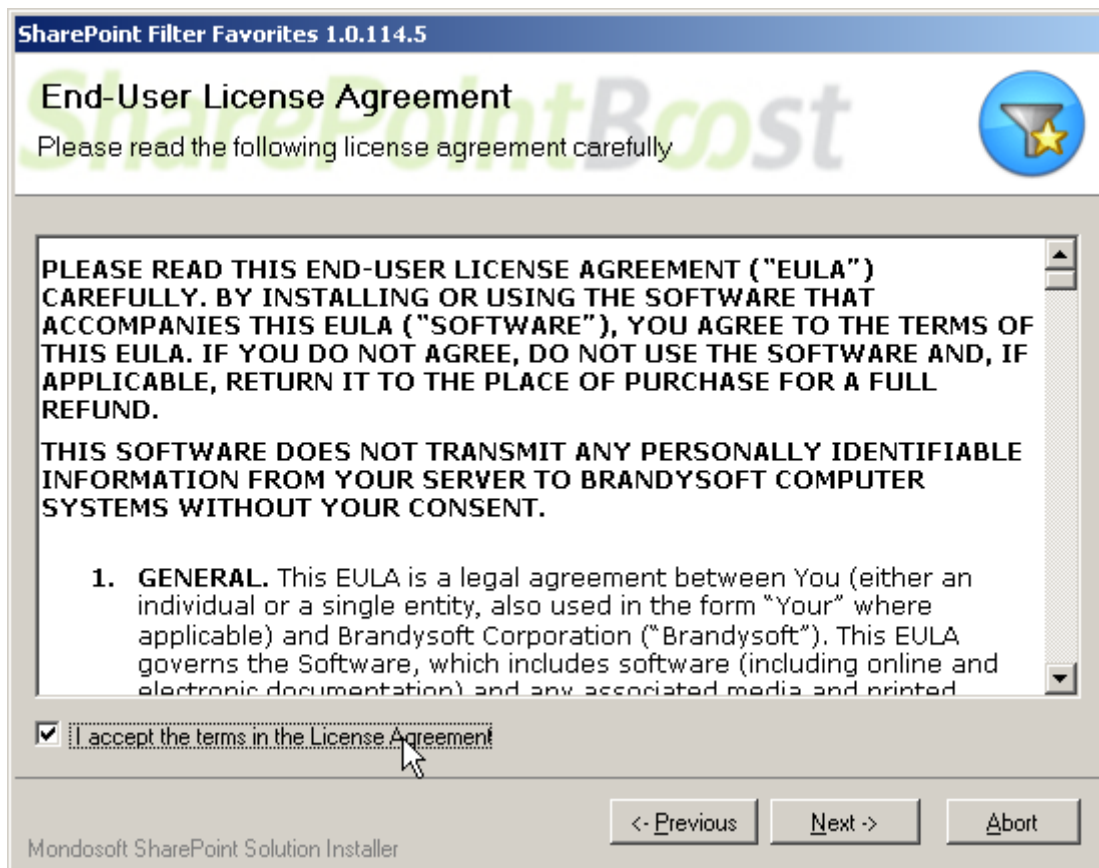
(start\_services.jpg)start services before installing SharePoint Filter Favorites

After system check is finished, click "Next".



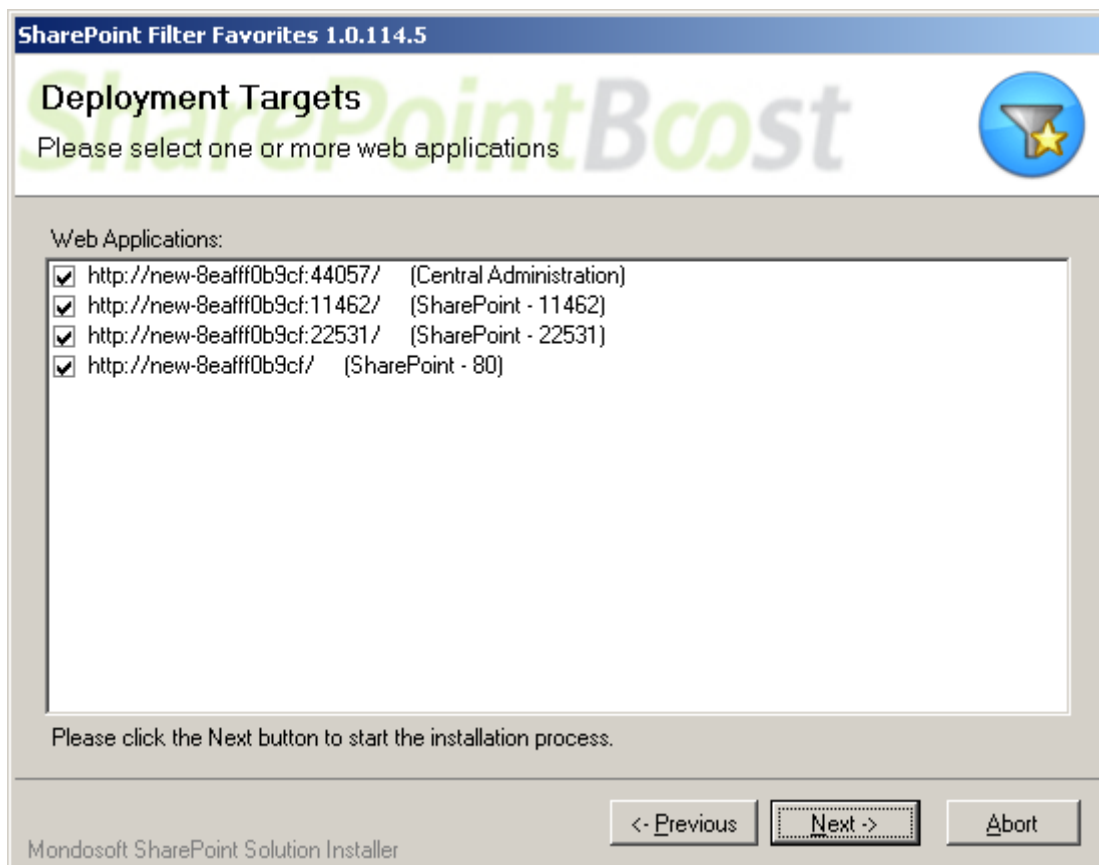
(System\_Check.jpg)SharePoint Filter Favorites installation system check

After reading License Agreement, click "accept" and go to next step.



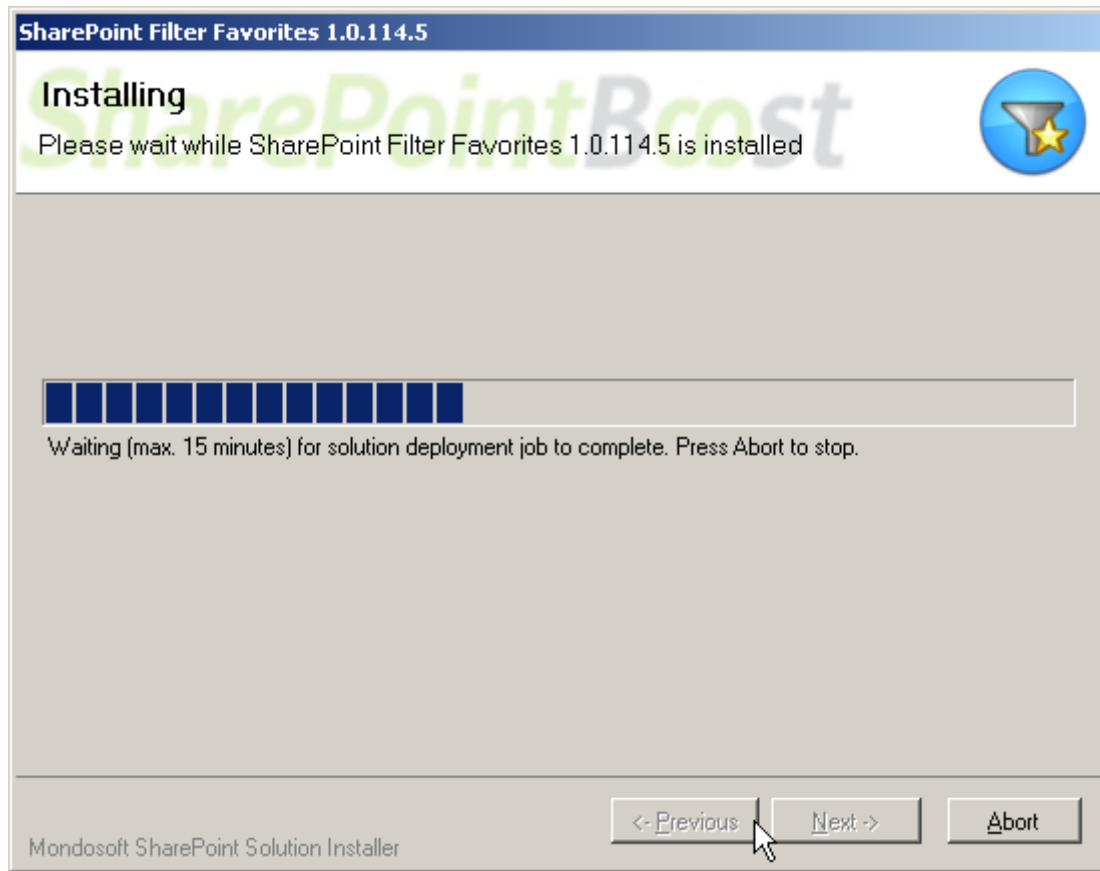
(Agreement\_License.jpg)SharePoint Filter Favorites agreement license

Select one or more web applications and click "Next".

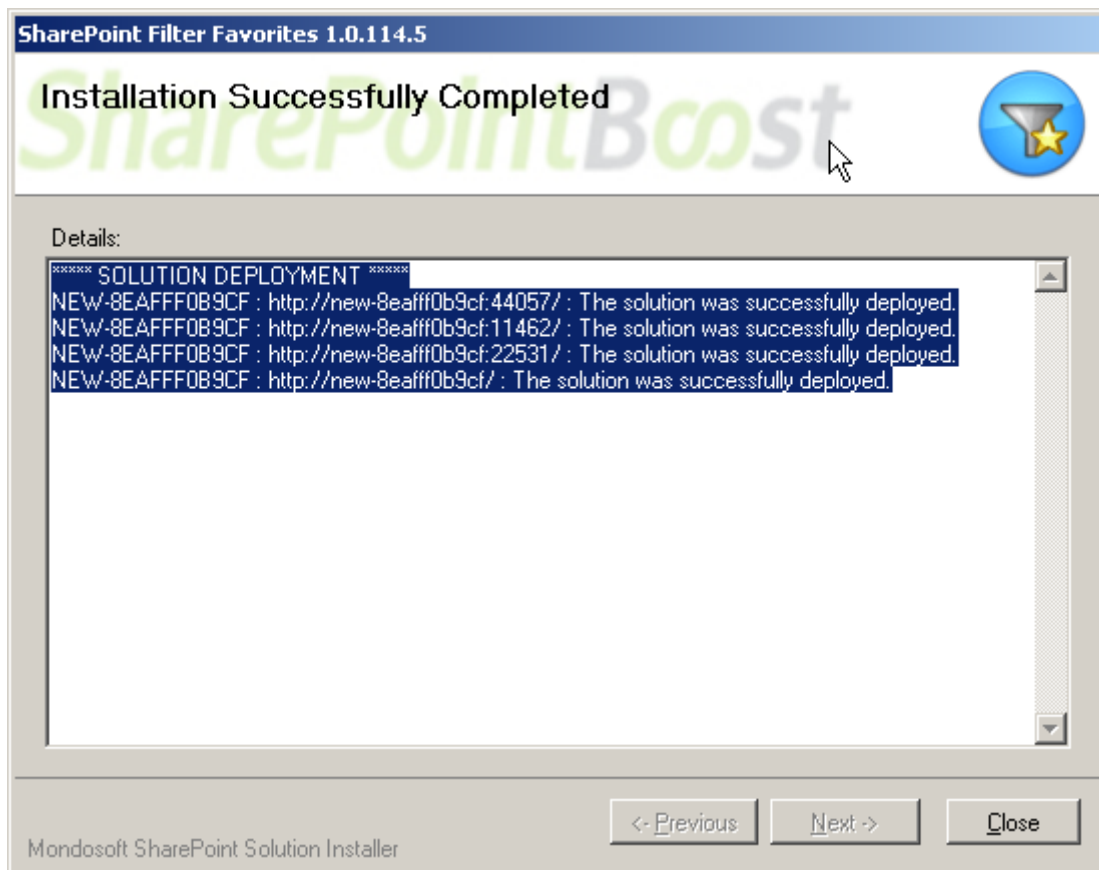


(installation\_deployment\_targets.jpg)SharePoint Filter Favorites installation deployment targets

Wait for installing, click “Next” for more deployment details.

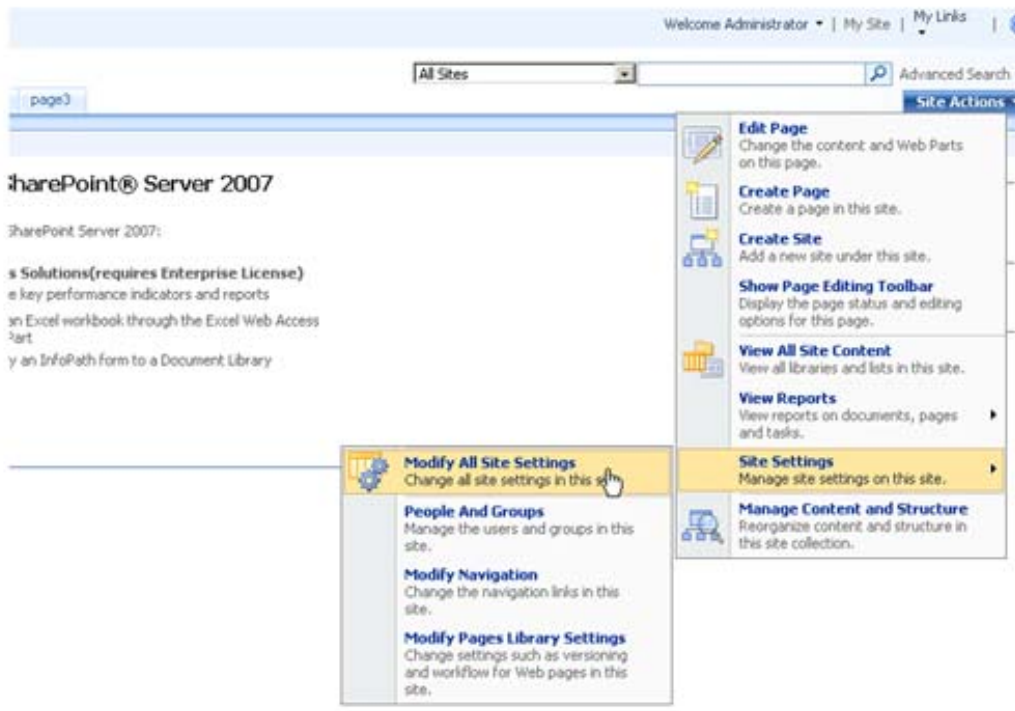


(Filter\_Favorites\_installing.jpg)SharePoint Filter Favorites installing



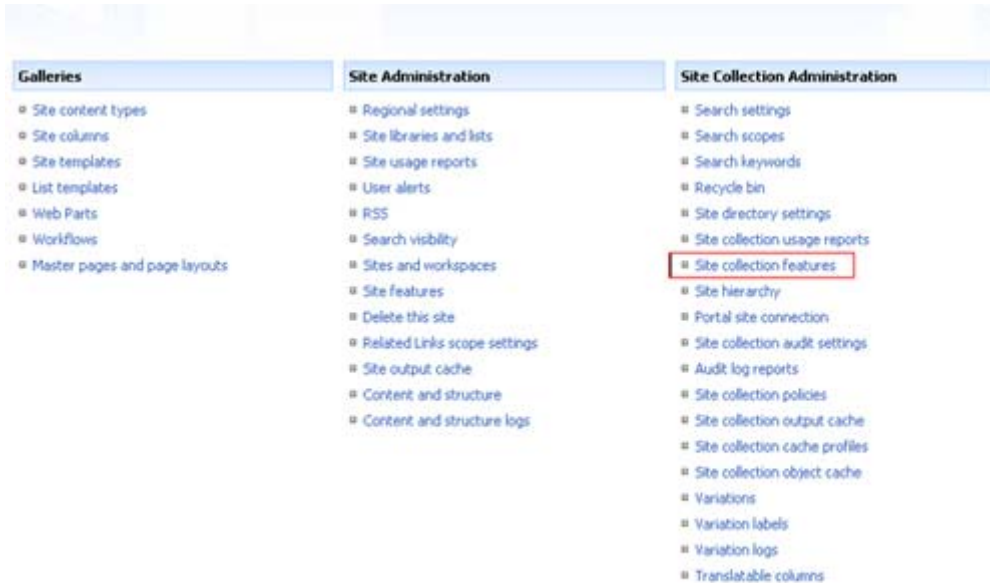
(installation\_successfully\_completed.jpg)SharePoint Filter Favorites installation successfully completed

Choose Site Actions dropdown menu, click “Modify All Site Settings”, and enter into Site Settings page.



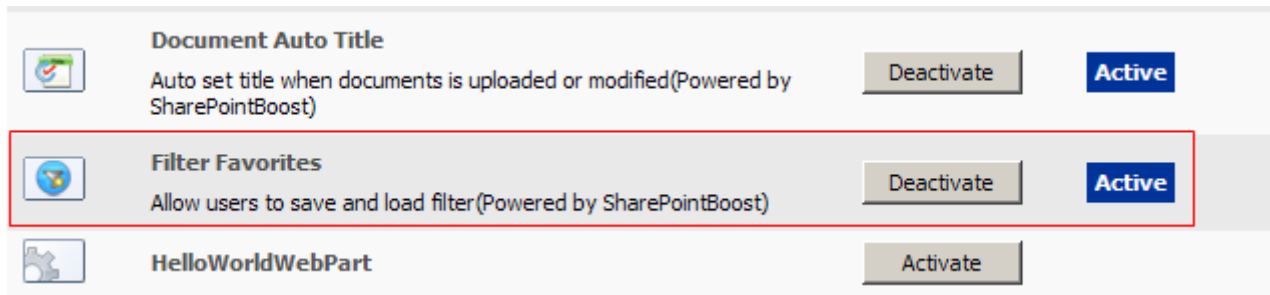
(Site\_Setting\_Menu.jpg)SharePoint Filter Favorites site actions menu

Select “Site Collection Features”.



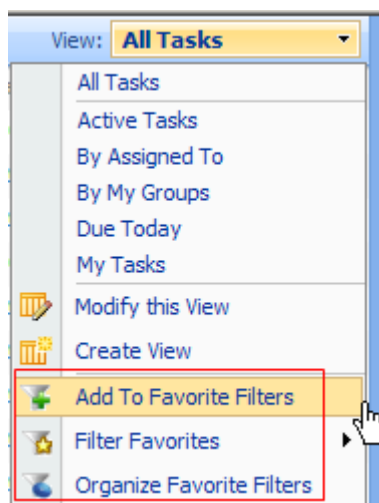
(Site\_Collection\_Feature.JPG)SharePoint Filter Favorites site collection features

In SharePoint Site collection feature list, activate SharePoint Filter Favorites.



(active\_Filter\_Favorites\_feature.jpg)(SharePoint Filter Favorites feature active)

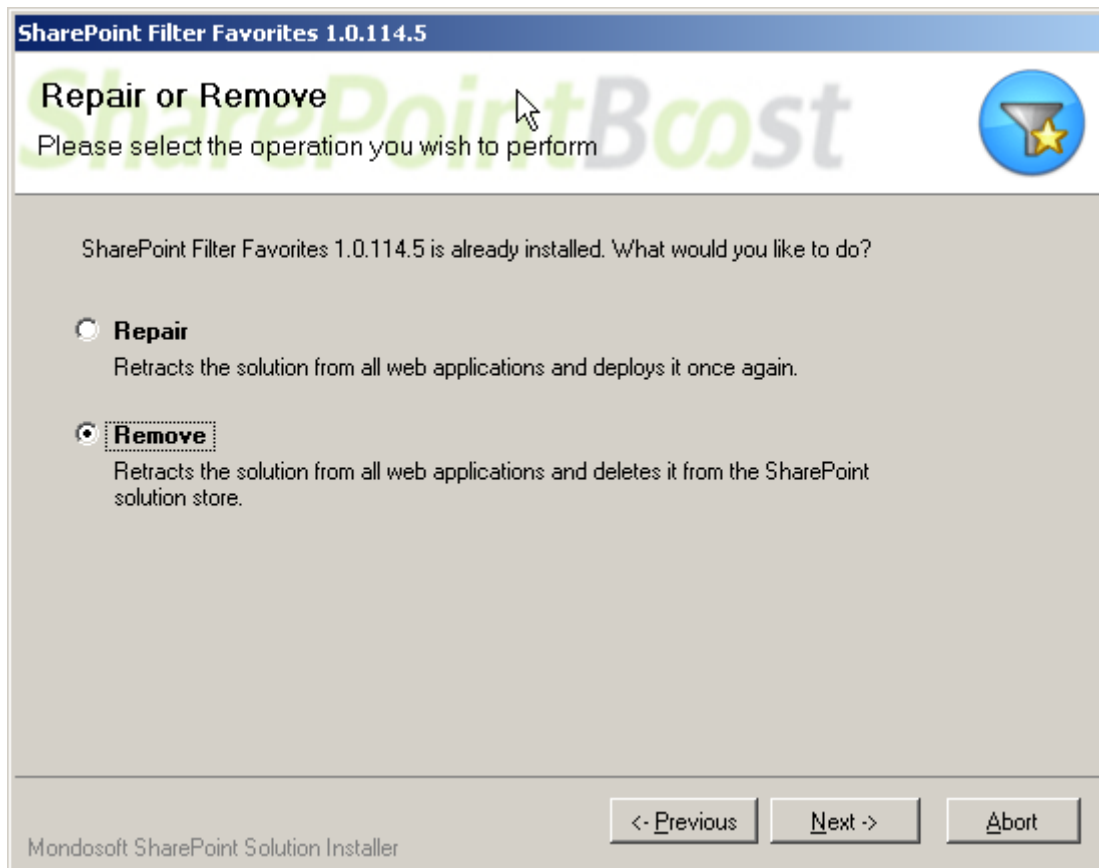
After installation, you can find Filter Favorites menus in every list’s view Drop-Down menu.



(Filter\_Favorites\_menus.jpg)SharePoint Filter Favorites menus

## Uninstallation

Run “setup.exe” again. (If your install file has been deleted, you can download it from <http://www.sharepointboost.com>). In the Repair and Remove page, select the Remove radio button and click “Next”, the Filter Favorites will be removed.



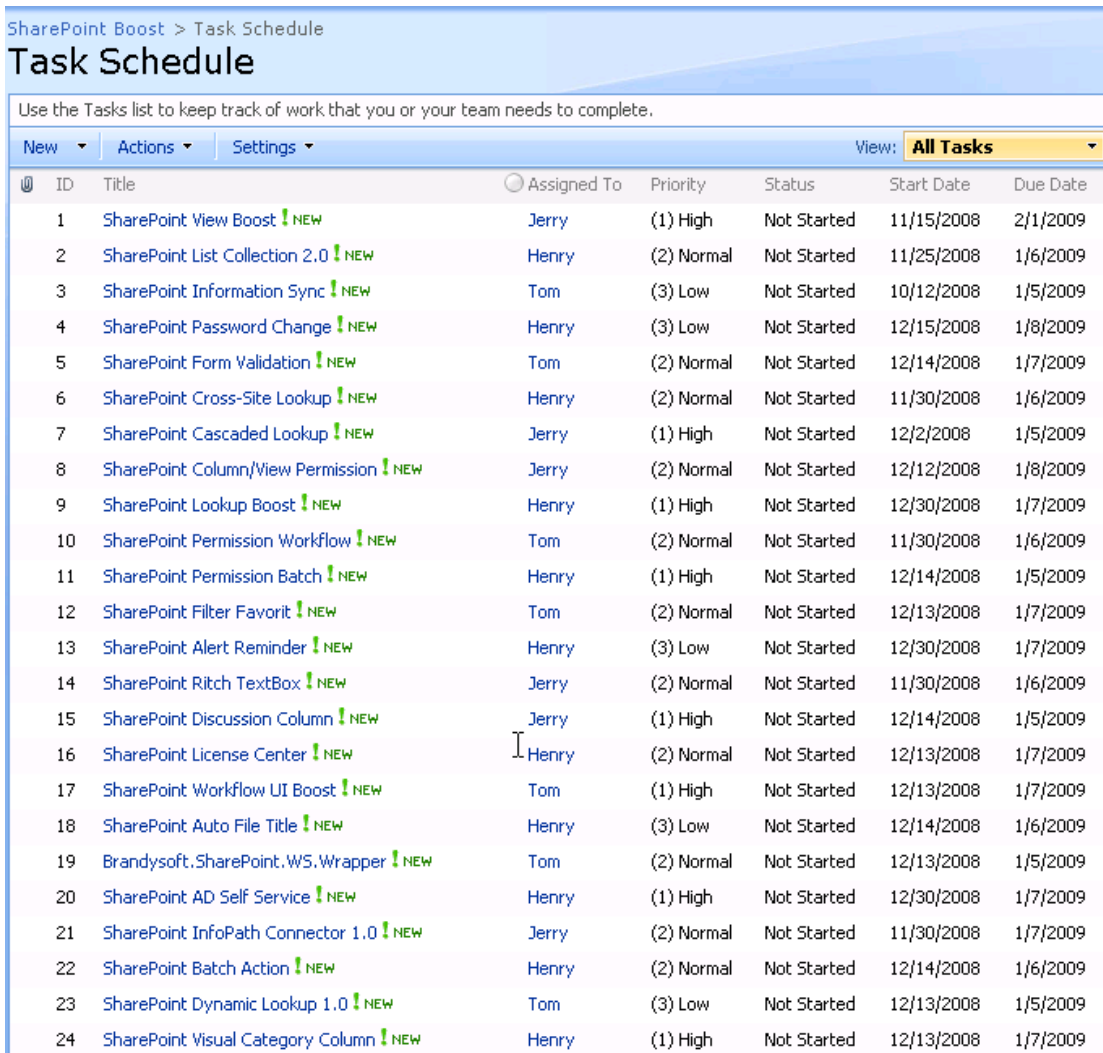
(Filter\_Uninstall.jpg)SharePoint Filter Favorites uninstall



## SharePoint List Filter Favorites Tutorial

SharePoint Filter Favorites make it more convenient to create and save filtered views by adding filtered views to Filter Favorite submenu. You can also delete it or rename it. Then you can load and use the filtered views as SharePoint views.

The following is a typical sample of SharePoint Filter Favorites application. In the Tasks Schedule list, there are many tasks for developers.



SharePoint Boost > Task Schedule

### Task Schedule

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

New Actions Settings View: All Tasks

ID	Title	Assigned To	Priority	Status	Start Date	Due Date
1	SharePoint View Boost !NEW	Jerry	(1) High	Not Started	11/15/2008	2/1/2009
2	SharePoint List Collection 2.0 !NEW	Henry	(2) Normal	Not Started	11/25/2008	1/6/2009
3	SharePoint Information Sync !NEW	Tom	(3) Low	Not Started	10/12/2008	1/5/2009
4	SharePoint Password Change !NEW	Henry	(3) Low	Not Started	12/15/2008	1/8/2009
5	SharePoint Form Validation !NEW	Tom	(2) Normal	Not Started	12/14/2008	1/7/2009
6	SharePoint Cross-Site Lookup !NEW	Henry	(2) Normal	Not Started	11/30/2008	1/6/2009
7	SharePoint Cascaded Lookup !NEW	Jerry	(1) High	Not Started	12/2/2008	1/5/2009
8	SharePoint Column/View Permission !NEW	Jerry	(2) Normal	Not Started	12/12/2008	1/8/2009
9	SharePoint Lookup Boost !NEW	Henry	(1) High	Not Started	12/30/2008	1/7/2009
10	SharePoint Permission Workflow !NEW	Tom	(2) Normal	Not Started	11/30/2008	1/6/2009
11	SharePoint Permission Batch !NEW	Henry	(1) High	Not Started	12/14/2008	1/5/2009
12	SharePoint Filter Favorit !NEW	Tom	(2) Normal	Not Started	12/13/2008	1/7/2009
13	SharePoint Alert Reminder !NEW	Henry	(3) Low	Not Started	12/30/2008	1/7/2009
14	SharePoint Ritcx TextBox !NEW	Jerry	(2) Normal	Not Started	11/30/2008	1/6/2009
15	SharePoint Discussion Column !NEW	Jerry	(1) High	Not Started	12/14/2008	1/5/2009
16	SharePoint License Center !NEW	Henry	(2) Normal	Not Started	12/13/2008	1/7/2009
17	SharePoint Workflow UI Boost !NEW	Tom	(1) High	Not Started	12/13/2008	1/7/2009
18	SharePoint Auto File Title !NEW	Henry	(3) Low	Not Started	12/14/2008	1/6/2009
19	Brandysoft.SharePoint.WS.Wrapper !NEW	Tom	(2) Normal	Not Started	12/13/2008	1/5/2009
20	SharePoint AD Self Service !NEW	Henry	(1) High	Not Started	12/30/2008	1/7/2009
21	SharePoint InfoPath Connector 1.0 !NEW	Jerry	(2) Normal	Not Started	11/30/2008	1/7/2009
22	SharePoint Batch Action !NEW	Henry	(2) Normal	Not Started	12/14/2008	1/6/2009
23	SharePoint Dynamic Lookup 1.0 !NEW	Tom	(3) Low	Not Started	12/13/2008	1/5/2009
24	SharePoint Visual Category Column !NEW	Henry	(1) High	Not Started	12/13/2008	1/7/2009

(Task\_Schedule .jpg)(SharePoint Filter Favorites Task Schedule list)

We can create a filtered view to show the high priority tasks for tom by following steps.

Filter Tom from Assigned To column

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

ID	Title	Assigned To	Priority	Status	Start Date	Due Date
1	SharePoint View Boost !NEW	A on Top	(1) High	Not Started	11/15/2008	2/1/2009
2	SharePoint List Collection 2	Z on Top	(2) Normal	Not Started	11/25/2008	1/6/2009
3	SharePoint Information Sync	Clear Filter from Assigned To	(3) Low	Not Started	10/12/2008	1/5/2009
4	SharePoint Password Change	Henry	(3) Low	Not Started	12/15/2008	1/8/2009
5	SharePoint Form Validation	Jerry	(2) Normal	Not Started	12/14/2008	1/7/2009
6	SharePoint Cross-Site Lookup	Tom	(2) Normal	Not Started	11/30/2008	1/6/2009
7	SharePoint Cascaded Lookup !NEW	Jerry	(1) High	Not Started	12/2/2008	1/5/2009

(Filter\_Tom.jpg) (Filter Tom from Assigned To Column)

Then filter High Priority from Priority column.

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

ID	Title	Assigned To	Priority	Status	Start Date	Due Date
3	SharePoint Information Sync !NEW		(1) High	Not Started	10/12/2008	1/5/2009
5	SharePoint Form Validation !NEW		(1) High	Not Started	12/14/2008	1/7/2009
10	SharePoint Permission Workflow !NEW		(2) Normal	Not Started	11/30/2008	1/6/2009
12	SharePoint Filter Favorit !NEW		(1) High	Not Started	12/13/2008	1/7/2009
17	SharePoint Workflow UI Boost !NEW		(1) High	Not Started	12/13/2008	1/7/2009
19	Brandysoft.SharePoint.WS.Wrapper !NEW		(2) Normal	Not Started	12/13/2008	1/5/2009
23	SharePoint Dynamic Lookup 1.0 !NEW	Tom	(2) Low	Not Started	12/13/2008	1/5/2009

Filter\_High.jpg (Filter High from Priority column)

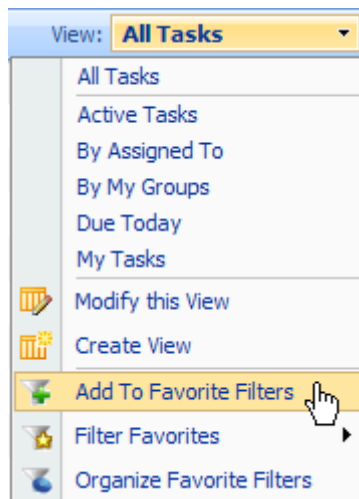
We can see the high priority tasks for Tom.

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

ID	Title	Assigned To	Priority	Status	Start Date	Due Date
3	SharePoint Information Sync !NEW	Tom	(1) High	Not Started	10/12/2008	1/5/2009
5	SharePoint Form Validation !NEW	Tom	(1) High	Not Started	12/14/2008	1/7/2009
12	SharePoint Filter Favorit !NEW	Tom	(1) High	Not Started	12/13/2008	1/7/2009
17	SharePoint Workflow UI Boost !NEW	Tom	(1) High	Not Started	12/13/2008	1/7/2009

High\_Task\_For\_Tom.jpg (High tasks for Tom)

Now, we can add this filtered view to Favorite Filters.



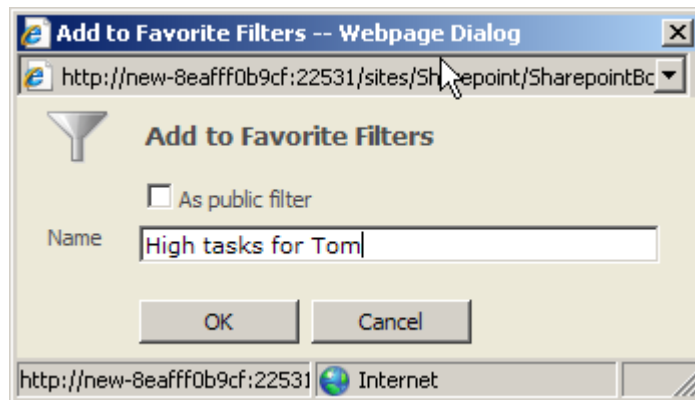
Add\_To\_Favorite\_Filters.jpg (Add to SharePoint Filter Favorites)

**Note:**

Three functions “Add To Favorite Filters”, ”Filter Favorites” and “Organize Favorite Filters” will be added to the view Drop-Down Menu after you have installed SharePoint Filter Favorites and activated the feature.

**First, Add Filtered View**

Give name to this filtered view.

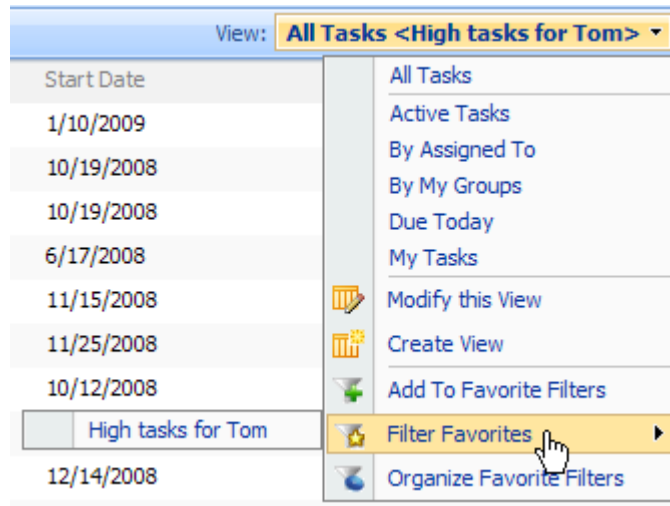


Add\_High\_Tasks\_For\_Tom.jpg (Adding filter name for filtered view)

After clicking the “OK” button, the filtered view will be added to Filter Favorites folder and we can see it in the Filter Favorites submenu.

**Note:**

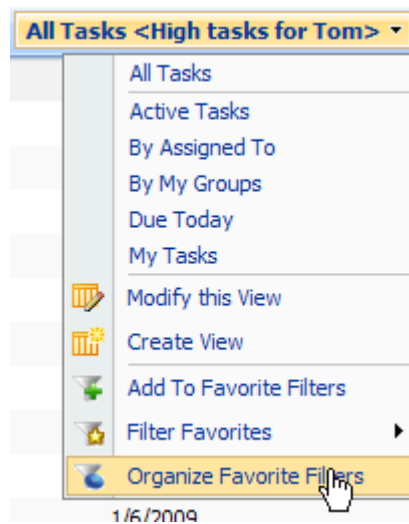
If you click the checkbox “As public filter” in the webpage dialog, the filtered view will be added as a public type, or it is a private type.



(Filter\_View\_Add\_To\_Favorite.jpg)(SharePoint Filter Favorites Task Schedule list)

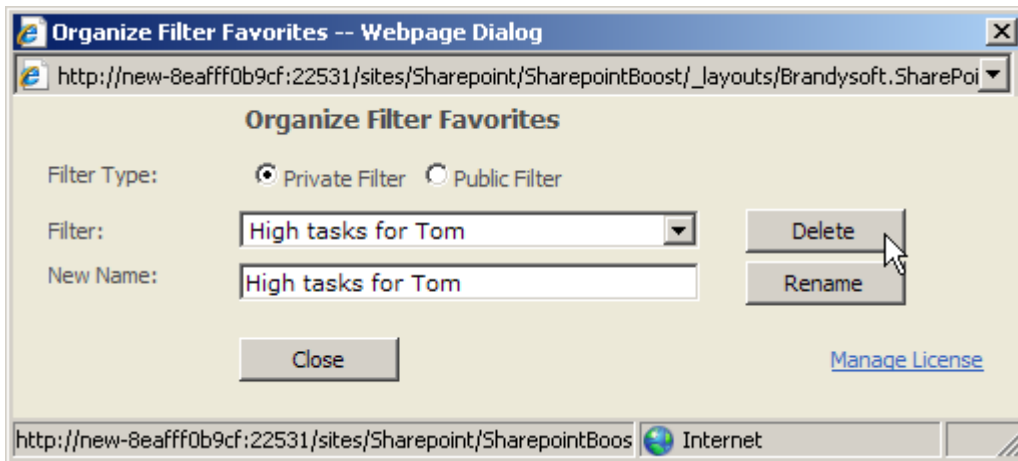
## Second, Delete Filtered View

Click the Organize Favorite Filters menu.



(Click\_Organize\_Menu.jpg) (Click Organize Favorite Filters menu)

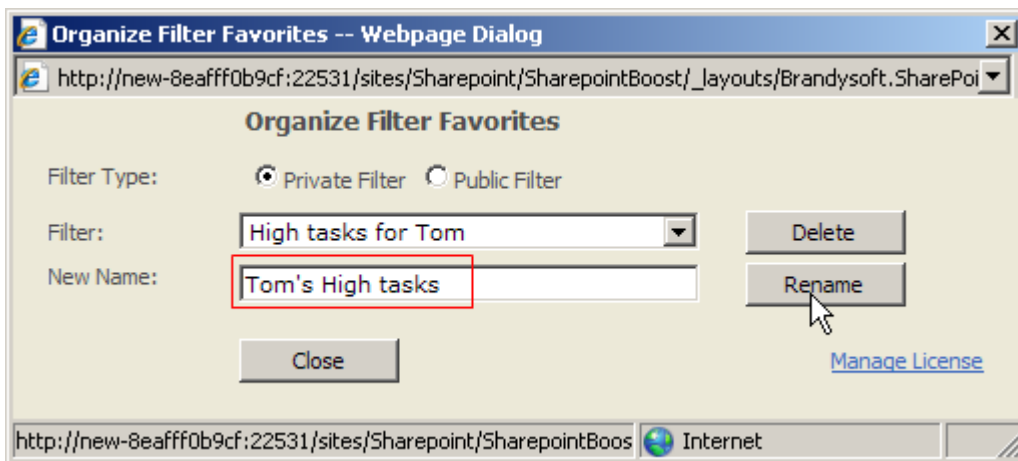
In the webpage dialog, all the saved filtered views will be listed in Filter Drop-Down list when you click Filter Type radio button. After selecting a filtered view, click the “Delete” button, then the filter will be deleted.



Delete\_Filter.jpg (Delete filter)

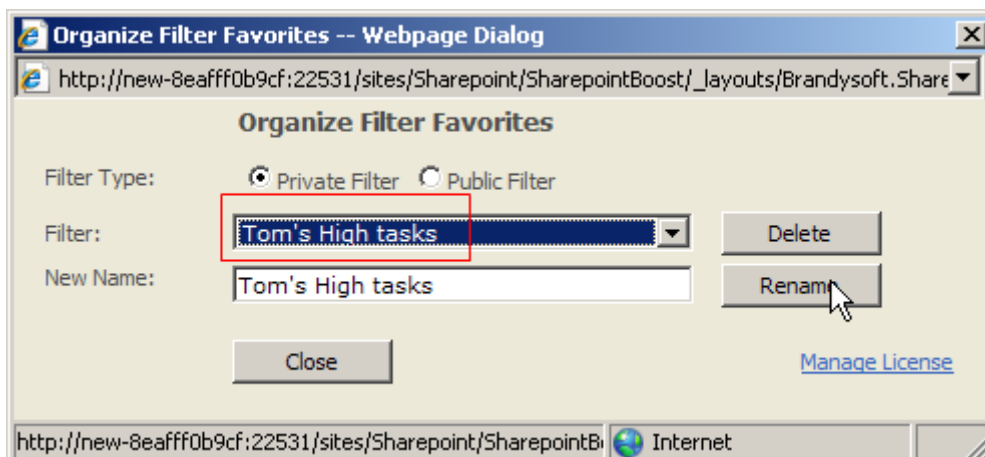
### Third, Rename Filtered View

In Organize Filter Favorites webpage dialog, you can rename the filtered view's name. Select a filter name in the Filter Drop-Down list and input a new name in the New Name single line text, then click the "Rename" button.



Rename\_Filter.jpg (Rename filter)

Then the name of the filtered view will be changed.



Name\_Changed.jpg(Name Changed)