



SharePoint List Filter Plus Web Part





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Introduction

KWizCom's SharePoint List Filter Plus web part enables you to filter SharePoint lists with maximum ease.

SharePoint List Filter web part is compatible with SharePoint 2013-2019 Server.

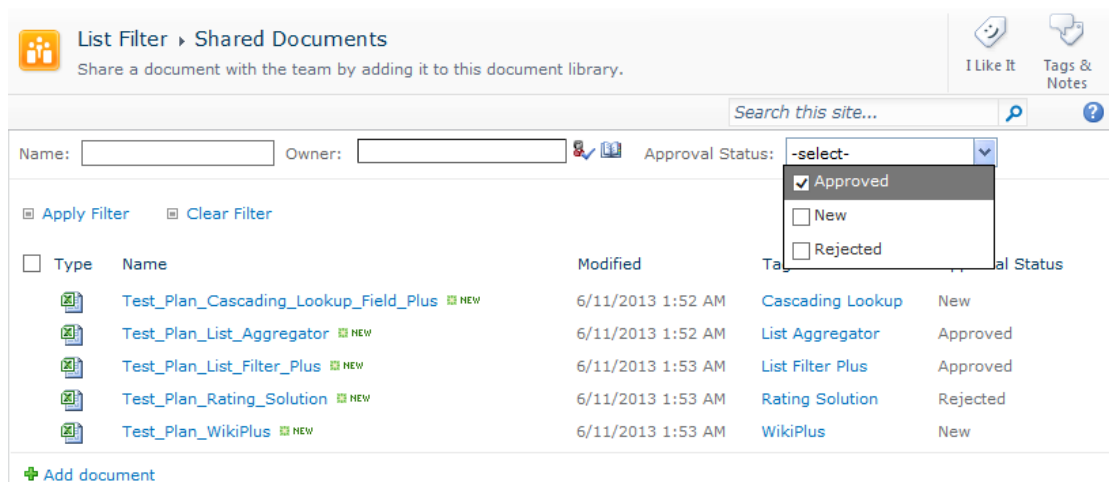
This document provides all the information needed to install, evaluate and deploy this KWizCom product:

- Product overview
- Installation guide
- Administrator guide

Overview

SharePoint List Filter Plus web part enables you to create custom filter forms, composed from all types of fields to easily filter any web part on your SharePoint site!

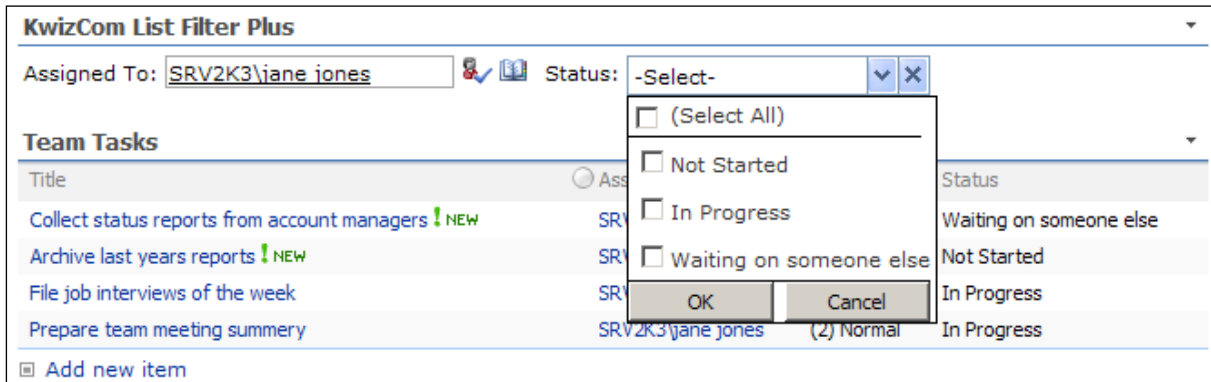
Connect your customized form to multiple lists and libraries at your convenience!



Select multiple values in several filtering controls without going through tedious page post-backs!

Support cascading behavior

When you select a value from one of the filtering drop-down controls it automatically filters all the other drop-down controls. In the following screenshot – after choosing "Jane Jones" in the 1st drop-down, the second drop-down (Status) will show only the statuses of tasks assigned to Jane Jones.

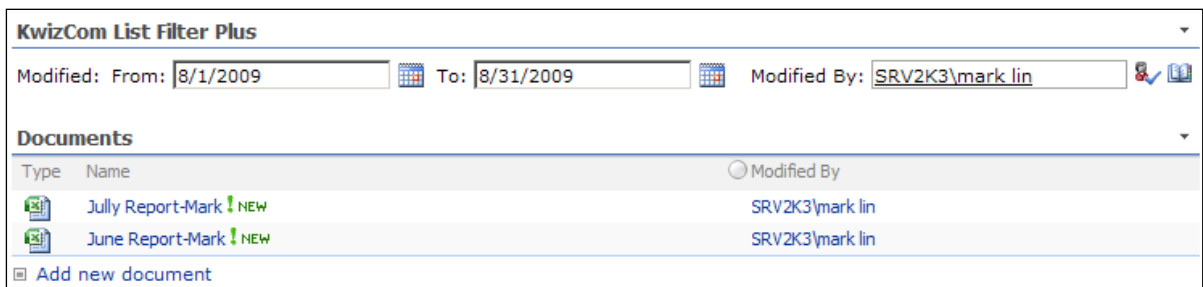


Easily run and display your required custom reports!

Now you can use The List Filter Plus web part as a generic query engine! Instead of filtering one specific list, you can configure the web part to run your required custom query on multiple lists, located in various sites!

Support different types of controls

Now you have a control type to match every desired field; choose between the text box, the drop down list, the single selection drop down list, the user picker and the date span (from... to...) controls to make the filter extra efficient!



Key Features & Benefits

Feature	KWizCom SharePoint List Filter Plus	SharePoint 2013-2019
Enables the creation of a custom filter form with all types of fields, including date span and user picker	✓	
Enables defining custom queries (any list type, cross site) and providing them using a DataTable connection to any consumer.	✓	
The filter “remembers” your previous filter settings.	✓	
Fully customizable interface via CSS	✓	
Share filter definition by sending a permalink	✓	
Integration with KWizCom’s Calendar Plus web part	✓	
Customizable captions	✓	
Support CONTAINS and exact phrase search	✓	
Supports calculated fields	✓	✓
Enables multiple selections in drop-downs	✓	
Comes with various skins	✓	
Supports cascading behavior	✓	
Saves the user's last filter settings	✓	
Can populate filter parameters from a query string (URL)	✓	
Multi-lingual by design – customize to the language of your choice with ease!	✓	
Support for accessibility standard – WCAG	✓	✓



Installation

Software prerequisites

Server Requirements

1. SharePoint Server/Foundation 2013-2019

Client PC Requirements

1. Microsoft Edge, Firefox Mozilla, Google Chrome (Latest versions)

Installation Procedure

SharePoint 2013-2019

1. Log in as SharePoint administrator account to your SharePoint front-end server.
2. Browse the product's page on KWizCom's website and click the "Go" link under the "Install using our Web Installer" section.
This will start the KWizCom web installer

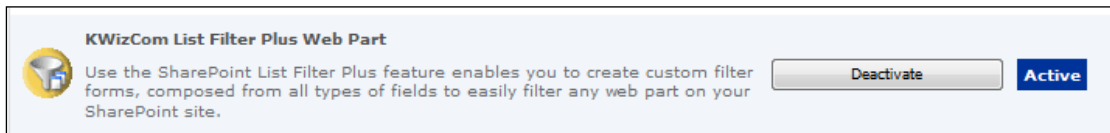
Note: The KWizCom Web Installer will automatically offer you to upgrade other existing KWizCom products on your farm, in case you have old versions installed. You can check which products you wish to update at this time.

3. In case you prefer just to download the relevant .wsp packages and manually deploy them, then in the web installer UI check the "Download only" option (3rd page in the installer's wizard). When the installer finishes you will be able to go to the installer's folder on your server, and install the KWizCom packages by simply running the "SP-WSPInstaller" powershell script.

Post Installation

SharePoint 2013-2019

After completing the package installation and deployment, Activate the feature in site collection/s where you want this feature to be available:



Un-installation procedure

SharePoint 2013-2019

1. Retract and remove the solution using SharePoint central admin or by using stsadm/powershell command line.

Administrator Guide

Introduction

The SharePoint List Filter Plus web part supports the SharePoint web part connection framework, and provides you with 2 connection types:

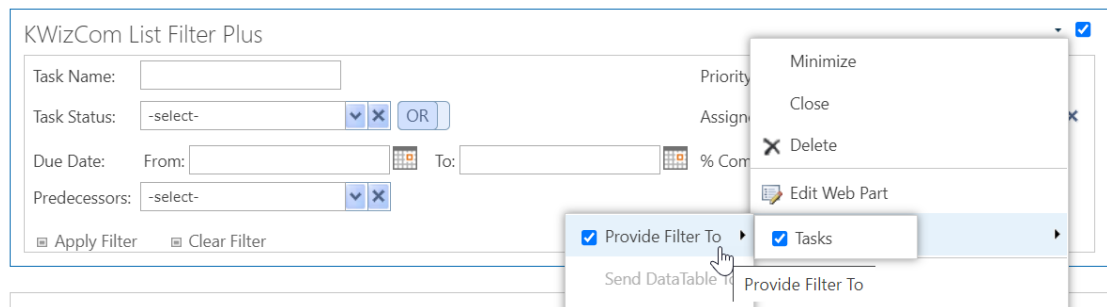
1. **Provide Filter To** –
In this mode the List Filter Plus web part provides to the connected web part with filter parameters that are used to filter the displayed items on the other web part.
Use this connection type to connect to SharePoint out-of-the-box list view web parts.
2. **Send Query To** -
In this mode the List Filter web part sendd a query to KWizCom web parts that consume that query format: KWizCom Calendar Plus and KWizCom List Aggregator.
3. **Send DataTable To** – in this mode the web part performs some defined query in a defined scope (you define the query and the scope in the web part's tool pane), and provides the result of that query in a data table to any consumer who supports that connection. This turns the List Filter Plus web part into a generic query engine that you can connect to your own custom web parts!

Web Part Properties & Configuration Options

Using the web part as a list filter

Before starting to configure the SharePoint List Filter Plus web part, you need to connect it to the standard SharePoint List web part which you want to filter:

1. When you are in Edit Mode, Go to the **"edit" menu -> Connections -> Provide Filter To**, and choose the list you wish to filter using the List Filter Plus:



After connecting the web part to the required List View web part, you can start configuring the web part's properties, which are grouped in 4 sections:

1. Filter
2. Advanced Options
3. Display Options
4. Table Provider Query Settings

Each section is detailed below.

Filter

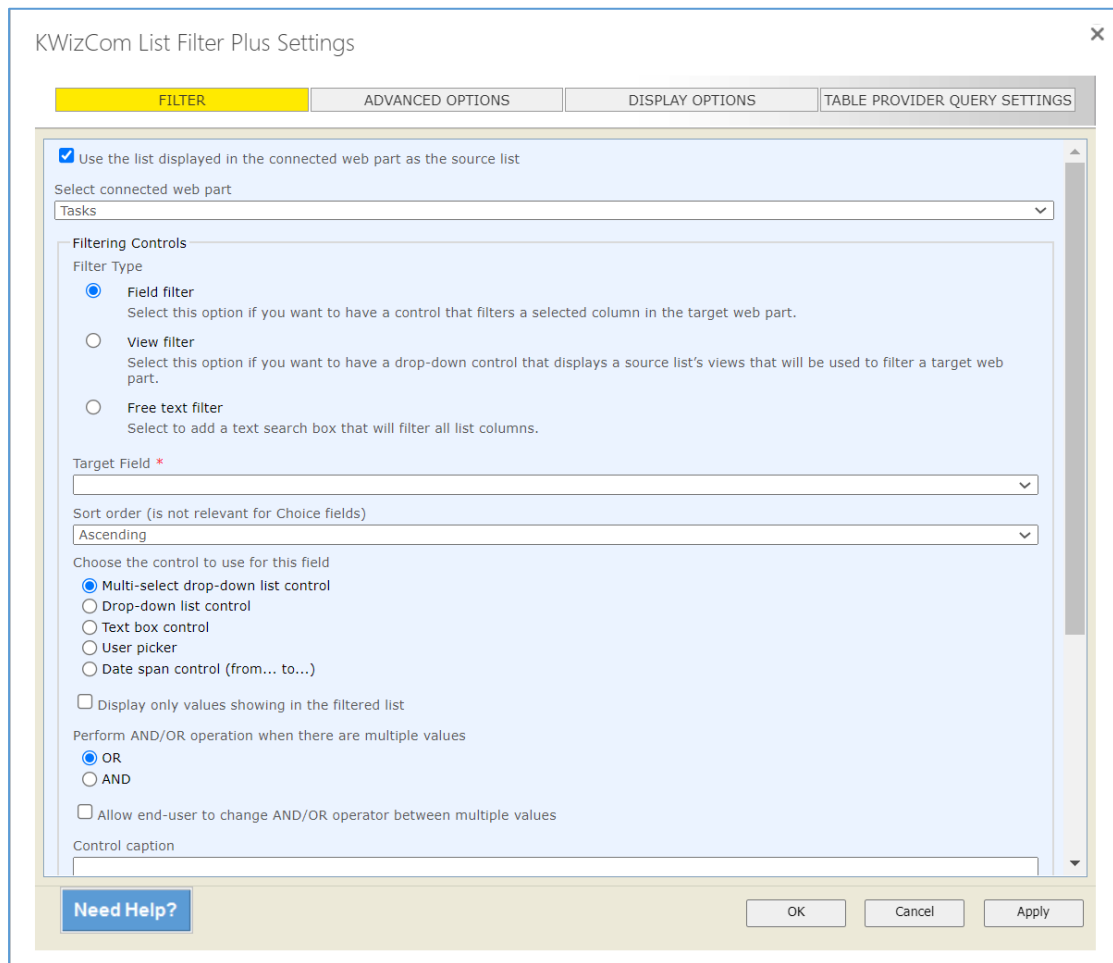
Here is where you configure the filtering controls that will be displayed in the list filter web part. For each added filtering control you need to define the following:

- Data source – where it retrieves its displayed data from.
- Control type – Drop-down, Textbox, Date span etc.
- Filter Type – can be a Field filter or a View filter.
- Target column – which column in the target web parts will be filtered by this control.

When adding a filtering control, you have 2 options of data sources:

- Using the filtered web part as the data source. This means that a filtering control of drop-down type will get its displayed values from the web part that it filters, so it will display only values that are displayed by the web part.
- Using some list as a source. In this case a drop-down filtering control retrieves its displayed values from some SharePoint list according to your configuration and not from the filtered web part.

The following screenshot displays the properties that you have to configure:



1. **Use the list displayed in the connected web part as your source list** – when checking this option, you'll be able to make one of the connected list web parts become the data source for the drop-down controls in this filter web part. Use this option if you want your drop-down filtering control to show only values that exist in the filtered web part.

If you are not checking this checkbox, you need to connect the added control to a source list from which it will retrieve its values (properties 3-5)

2. **Select connected web part** – choose the web part that you wish to be the data source for a drop-down control in your filter (relevant only when the "Use the list displayed in the connected web part as your source list" checkbox is checked).
3. **Source Site URL** – choose the site you wish to connect to
4. **Source list** - choose the list or library you want to connect
5. **Select a view** – select the list view to apply to the connected SharePoint list.

6. **Filter Type** – Select between Field filter, View filter or Text filter.
Field filter will filter a defined field at the target web part.
View filter will display a drop-down of views and will filter the target web part by the selected view.
Text Filter will filter all target list columns.

The following properties appear only for a Field filter type:

7. **Source Field** – select the field that the control (in case it's a drop-down) will retrieve its values from.
8. **Target Field** – this specifies which field in the target web part will be filtered by this control.
9. **Sort Order** – this allows you to choose the display order of the non choice fields, between ascending and descending.
10. **Control Type:**
 - Multi-select drop-down control
 - Drop down list control
 - Textbox control
 - User Picker control
 - Date span control (from... to...)

The following 2 properties appear only for a View filter type:

11. **Default View** – select the view that will be displayed by default by the filtering control.
12. **Hide views** – Type the names of views that you wish to be hidden from the filtering control (“;” delimited)
13. **Display only values showing in the filtered list** – This checkbox is relevant only when the “Use the list displayed in the connected web part as the source list” property is checked.
In that case you can choose between showing in the filtering control only values that appear in the filtered web part, or show all values from connected web part's source list, regardless of what actually appears in the web part.
14. **Operator applied when user selects multiple options** -
This property is relevant only for multi-select drop-down control. It enables you to define how multiple selected choices will be processed in the filter: as OR (default) or as AND operator.
15. **Allow end-users to change AND/OR operation between multiple selected options** -
This property is relevant only for multi-select drop-down control. When checked, end-user will be able to switch between OR/AND operator on selected choices in a multi-select drop-down:

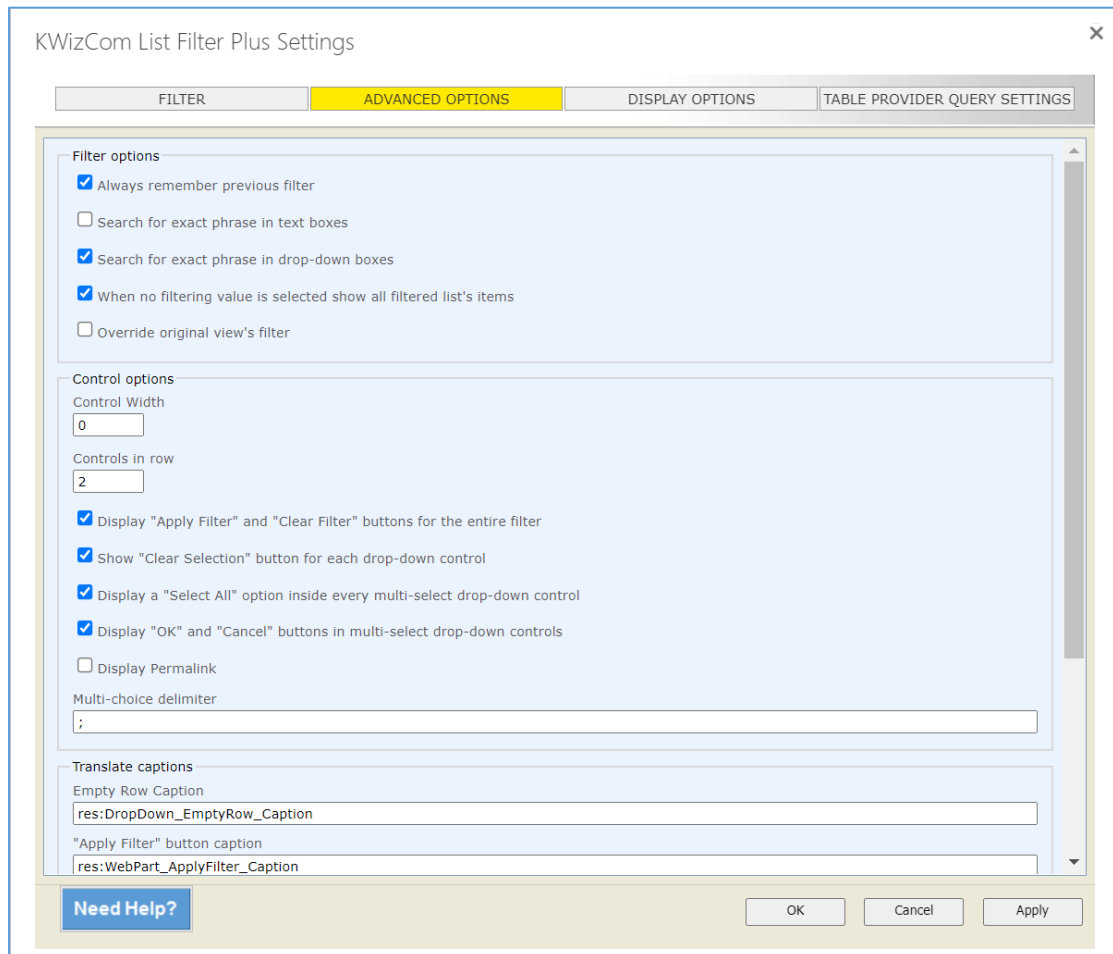
Assigned To: Assigned To:

16.Control caption – create the caption of your choice to be displayed next to the filtering drop-down box / textbox.

After you define a source field and target field pair, click the “Add” button in order to add this definition to the “Filtering Controls” list:

Filtering Controls										
		Source Url	Source List	View	Source Field	Target Field	Caption	Filter Type	Sort Order	Position
Delete	Edit	[current site]	Products		Product Name	Product	Product Name	multiselect drop down list	ASC	1
Delete	Edit				Production Version	Production Version	Production Version	multiselect drop down list	ASC	2
Delete	Edit				Title	Title	Title	text box	ASC	3
Delete	Edit				Issue ID	Issue ID	Issue ID	text box	ASC	4
Delete	Edit				Customer E-mail	Customer E-mail	Customer E-mail	text box	ASC	5
Delete	Edit				Approved	Approved	Approved	drop down list	ASC	6

Advanced Options



KWizCom List Filter Plus Settings

FILTER **ADVANCED OPTIONS** DISPLAY OPTIONS TABLE PROVIDER QUERY SETTINGS

Filter options

- Always remember previous filter
- Search for exact phrase in text boxes
- Search for exact phrase in drop-down boxes
- When no filtering value is selected show all filtered list's items
- Override original view's filter

Control options

Control Width
0

Controls in row
2

- Display "Apply Filter" and "Clear Filter" buttons for the entire filter
- Show "Clear Selection" button for each drop-down control
- Display a "Select All" option inside every multi-select drop-down control
- Display "OK" and "Cancel" buttons in multi-select drop-down controls
- Display Permalink

Multi-choice delimiter
;

Translate captions

Empty Row Caption
res:DropDown_EmptyRow_Caption

"Apply Filter" button caption
res:WebPart_ApplyFilter_Caption

Need Help? OK Cancel Apply

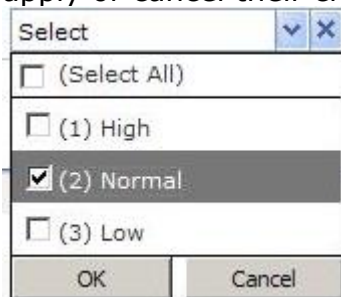
Use this section to setup advanced Web Part options:

- **Always remember previous filter** – checking this checkbox will make user's filter selection 'persistent' - the web part will "remember" the filter settings even if the user closes the browser.
- **Search for exact phrase in textboxes** –If this property is left unchecked, textboxes filtering will always be a "CONTAINS" filter (default). Check this property if you want to have exact text search instead. In this mode users can use "*" wildcard for explicit CONTAINS search.
- **Search for exact phrase in drop-down boxes** –If this property is left unchecked, drop-down filtering will always be a "CONTAINS" filter. Check this property if you want to have exact text search instead.
- **When no filtering value is selected show all filtered list's items** – Check if you want to display all items from the filtered web part when there no filter, or uncheck to display no items until filtering is applied.

- **Override original view's filter** – checking this checkbox will make the selected user's filter override view settings of the filtered list.
- **Control Width** – Define the width of the web part.
- **Controls in row** – Define the number of drop-down filter controls
- **Display "apply filter" and "clear filter" buttons for the entire filter** – the "apply filter" and "clear filter" buttons will be available.

Apply Filter Clear Filter

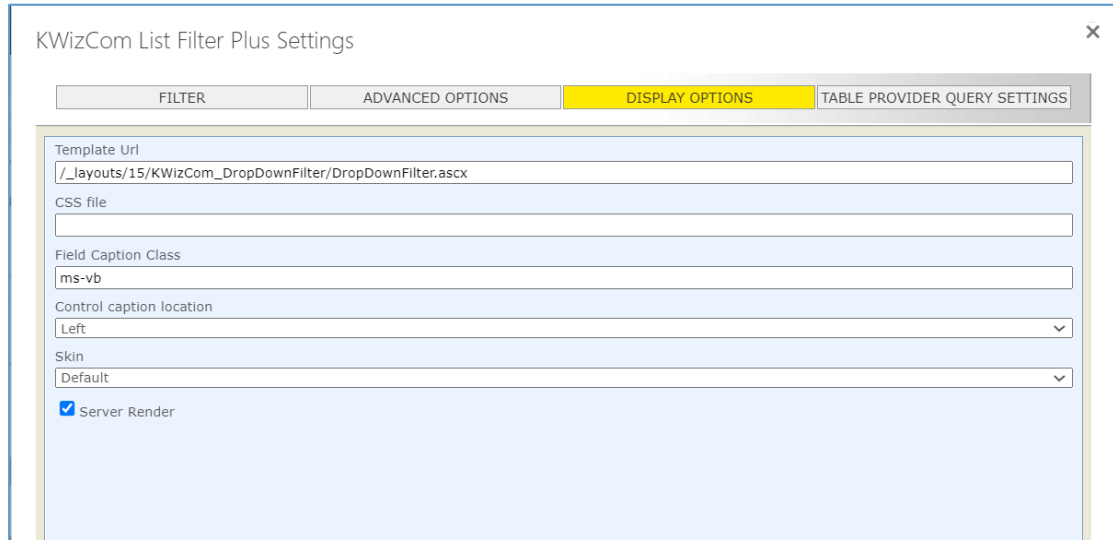
- **Show "Clear Selection" button for each drop-down control** – Check to display a clear filter button per control.
- **Display a "Select All" option inside every multi-select drop-down control** – Check to enable users to select all items in a multi-select drop-down controls.
- **Display "OK" and "Cancel" buttons in every drop - down control** – adds "OK" and "Cancel" buttons to enable the users to apply or cancel their choices.



- **Display Permalink** – Check this property to display a "copy current filter" link at the bottom-right side of the List Filter web part. End-users can use that link to copy a configured filter and share it with other users.
- **Multi-choice delimiter** – By default, the List Filter web part uses the ";" as a delimiter when sending multiple values as filtering parameters to the connected web parts. You should consider changing this delimiter to another character only if you think that the ";" is used in the connected web parts as part of the data (so in that case the ";" might not function properly).
- **Empty Row Caption** – Define the caption for the empty row option that will be displayed in the drop-down box.
- **"Apply Filter" button caption** – Define the caption for the "Apply Filter" that will be displayed in the drop-down box.
- **"Clear Filter" button caption** – Define the caption for the "Clear Filter" option that will be displayed in the drop-down box.

- **“Select All” caption** - Define the caption for the “Select All” that will be displayed in the drop-down box.
- **“OK” button caption** - Define the caption for the “OK” that will be displayed in the drop-down box.
- **“Cancel” button caption** - Define the caption for the “Cancel” buttons that will be displayed in the drop-down box.
- **Permalink caption** – Use this property to change the default permalink caption to your own customized caption.

Display Options



- In this section you can customize the List Filter Plus Web Part display using your own CSS file.
- You can also customize the entire web part layout by updating the web part's user control (Template URL), using Visual Studio.
- The "Server Render" enforces the web part to render same way as it does in SP2010, which is required to make sure the filtered lists' column filtering and pagination to work properly in SP2013-SP2019. Unchecking it might be required when customers have their own code in the page.

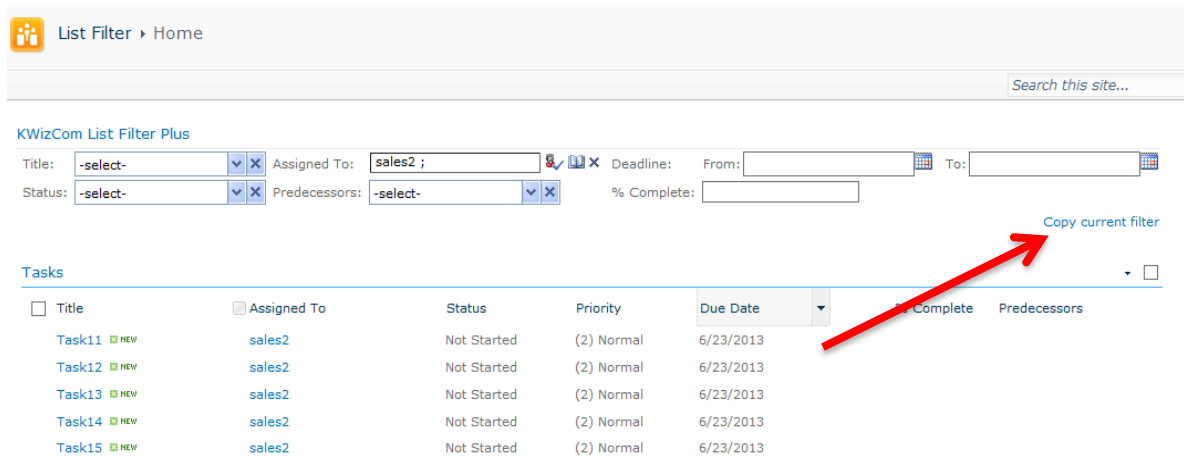
Display Options

This is setting page is kept for backwards competability for customer still using the "Table Provider" connection.

Permalink functionality

In run-time, end-users use the List Filter web part to define required filtering values in order to get the required list items.

The List Filter web part enables end-users to share their configured filters with other users. This is done by clicking the “Copy current filter” link:



Title	Assigned To	Status	Priority	Due Date	% Complete	Predecessors
Task11 <small>NEW</small>	sales2	Not Started	(2) Normal	6/23/2013		
Task12 <small>NEW</small>	sales2	Not Started	(2) Normal	6/23/2013		
Task13 <small>NEW</small>	sales2	Not Started	(2) Normal	6/23/2013		
Task14 <small>NEW</small>	sales2	Not Started	(2) Normal	6/23/2013		
Task15 <small>NEW</small>	sales2	Not Started	(2) Normal	6/23/2013		

Once you click this link, you’ll get a popup window with the generated permalink URL. Copy this URL, and then you can send it to other users. Using this URL will show other users the same filter configuration you’ve made.

Integration with KWizCom's web part parts

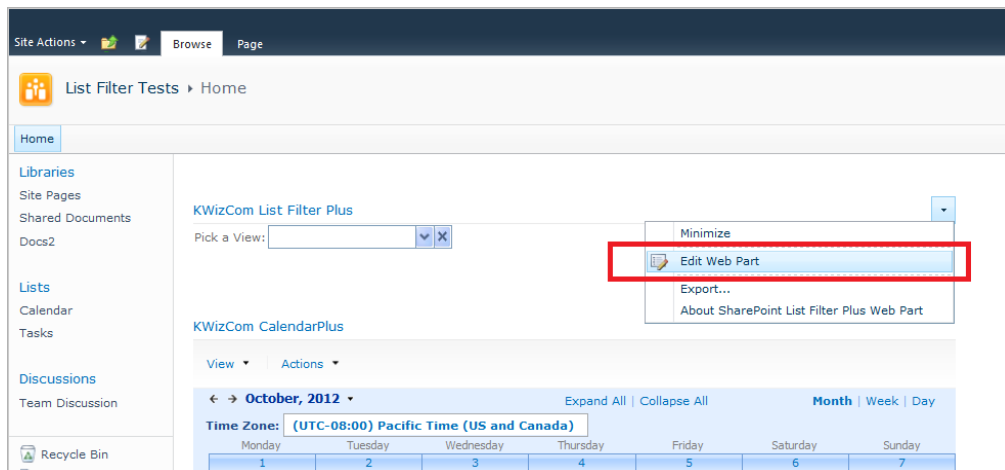
The KWizCom List Filter Plus web part can connect and filter the following KWizCom web parts:

- Calendar Plus web part
- List Aggregator web part

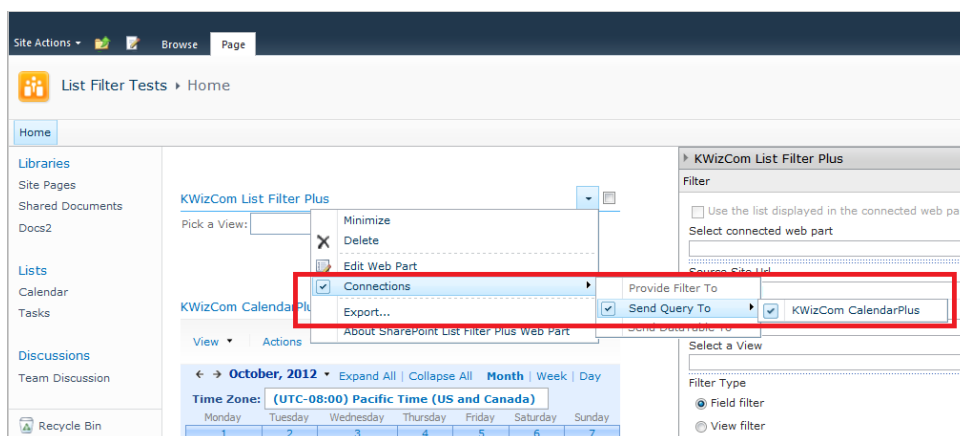
In this mode the List Filter Plus web part provides a query for filtering KWizCom Calendar Plus/List Aggregator Web Part.

Connect the List Filter Plus to a KWizCom web part (example for Calendar Plus web part):

1. Edit the page:



2. Now Click **"Connections"->"Send Query To"->"KWizCom CalendarPlus"**:



3. Now configure the List Filter Plus web part to display the desired view filter and you're done!

Here is an example of how it works:

No view is selected:

KWizCom List Filter Plus

Pick a View:

KWizCom CalendarPlus

View Actions

← → **October, 2012** Expand All | Collapse All **Month** | Week | Day

Time Zone:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
Thanksgiving		03:00 PM New Version Requirements Overview				
15	16	17	18	19	20	21
04:00 PM Dev Status						

Selecting Meetings View will hide 'Thanksgiving':

KWizCom List Filter Plus

Pick a View:

KWizCom CalendarPlus

View Actions

← → **October, 2012** Expand All | Collapse All **Month** | Week | Day

Time Zone:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
		03:00 PM New Version Requirements Overview				
15	16	17	18	19	20	21
04:00 PM Dev Status						