Quick Filter

Administrator Guide

Copyright

Company information:

Email: info@vitextra.com

Website: vitextra.com

Contents

1. Introduction

The web part of the Vitextra Quick Filter makes it possible to filter data in lists and libraries of SharePoint documents with a single filter field.

The web part of the Vitextra Quick 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 Quick Filter installation, activation, and setup:

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

2. Product description

Vitextra Quick Filter makes it possible to filter data within SharePoint Lists and Document Libraries with a single field.

2.1 Single filtering field

Quick Filter is a single field for filtering data by selected columns. This saves page space and makes the filtering process more efficient.

2.2 Populate filter with URL parameter

Quick Filter allows you to initiate a filter field with the value specified in the URL parameter.

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.[1]

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 Quick Filter:

- SharePoint Administration
- SharePoint Timer Service

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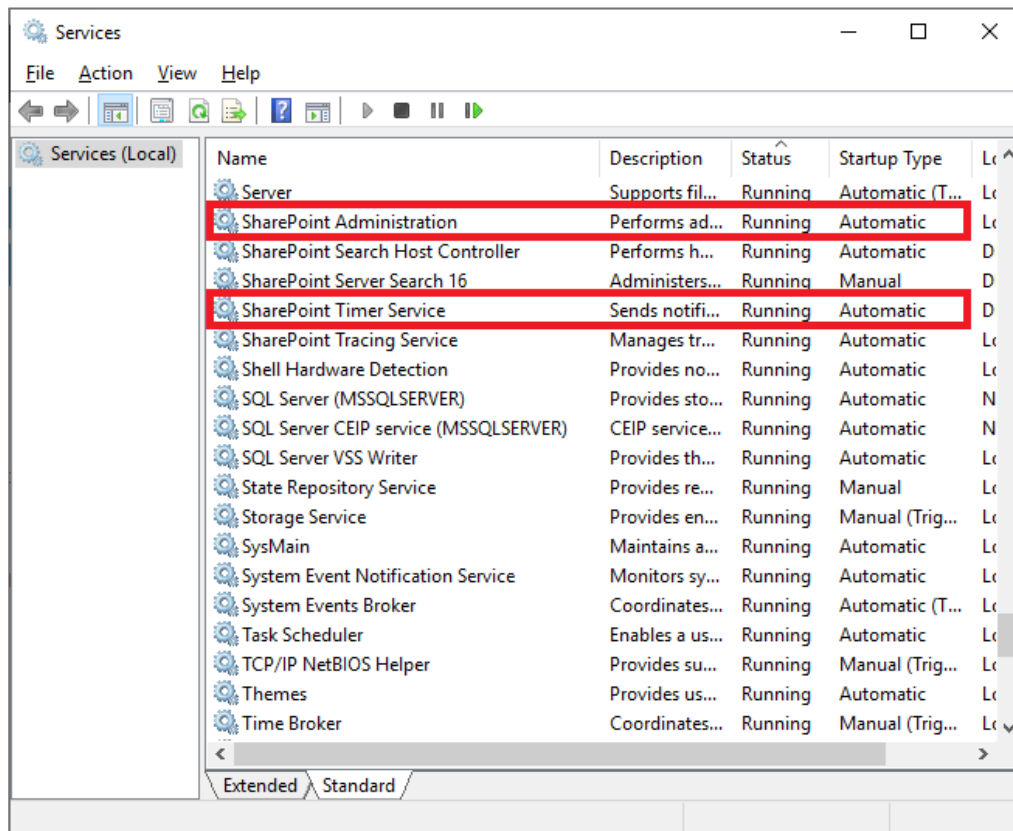
[1] Vitextra installers are compatible with the following SharePoint versions: 2013, 2016, 2019.
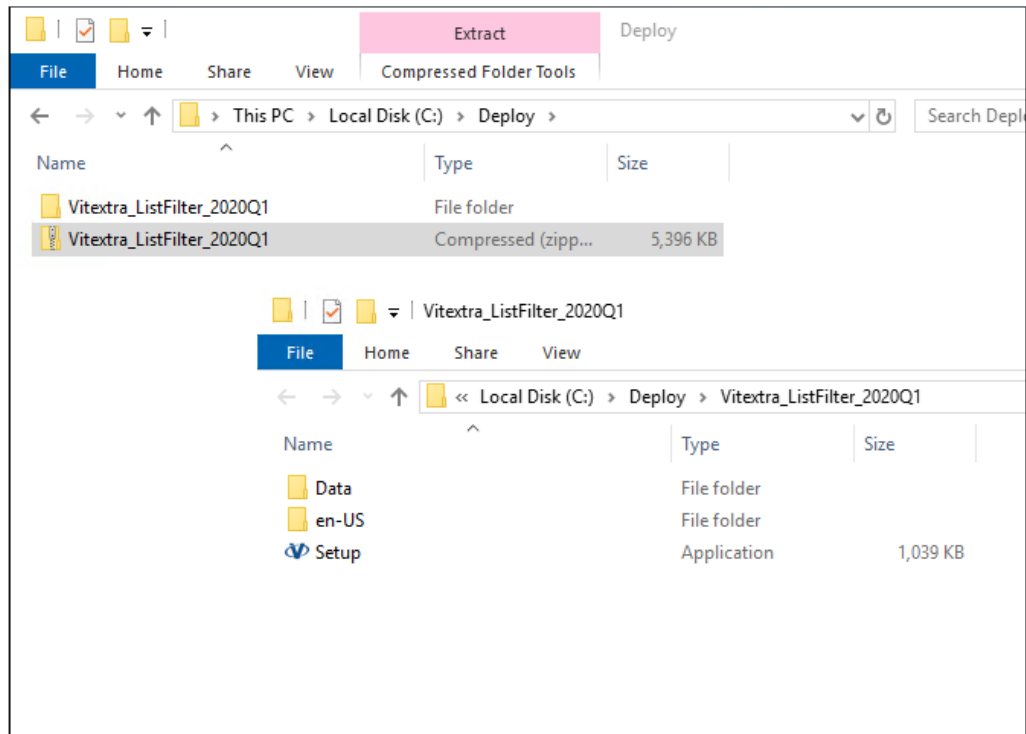
3.3   Required permissions

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

- Membership in the local administrator group
- Membership in the SharePoint farm administrator group

3.1 Vitextra product installer

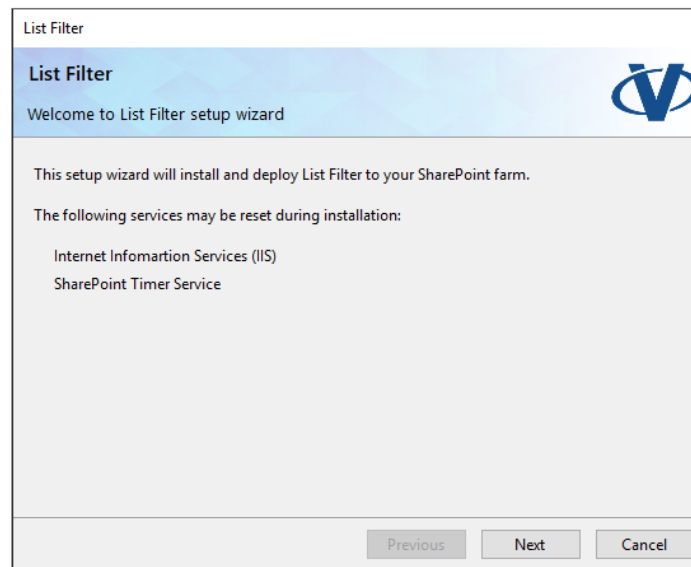Unpack the installer and run Setup.exe[2]

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.

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[2]

The Vitextra product installer is not localized and supports English only.
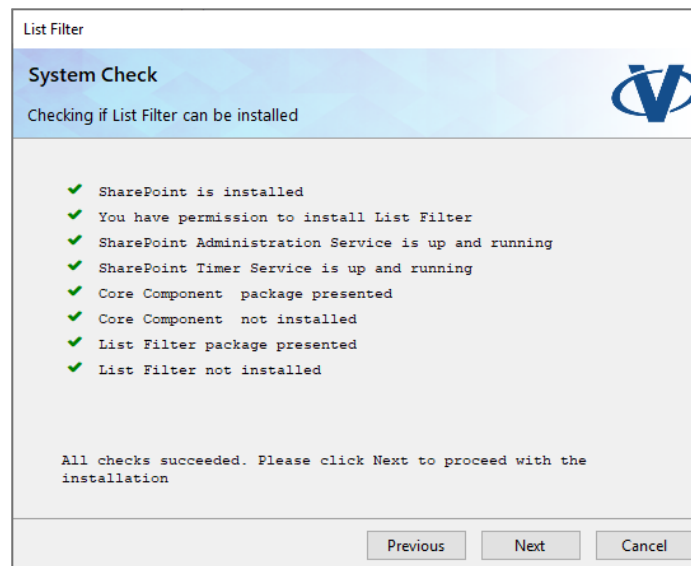
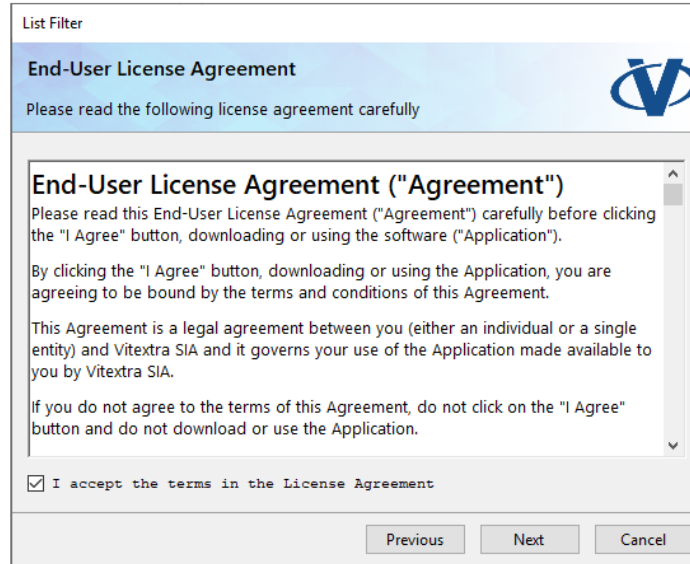Click **Next** to start the system and installer check process.

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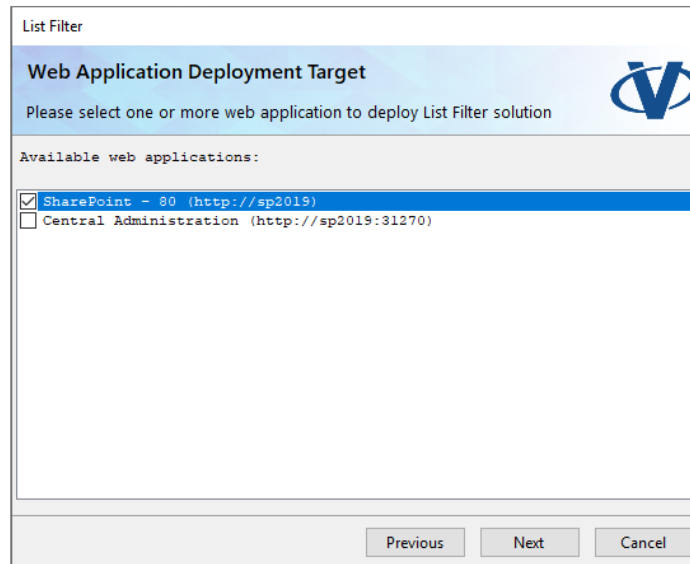
Select the SharePoint web applications where you want to install the Quick Filter and click Next to start the installation.
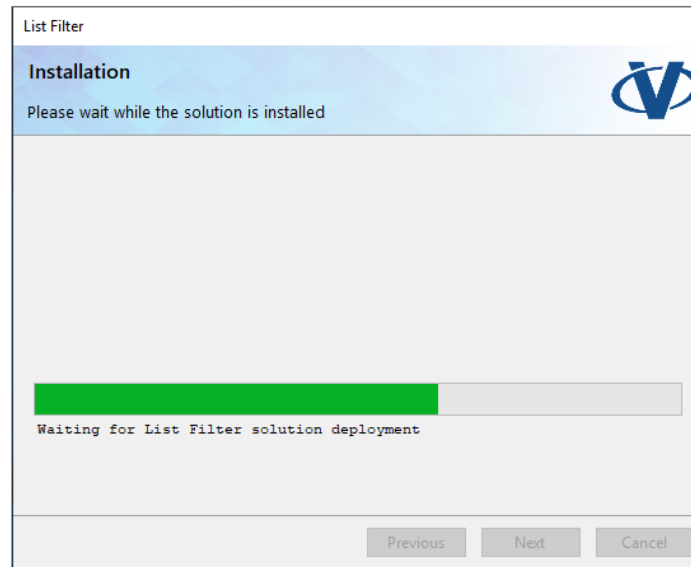

Wait until the installation is complete.

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

1. 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.

Copy any of the Quick 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 Quick Filter in the list of installed products:

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

Quick Filter

Статус	Пробная версия
Ключ продукта Введите 25-значный ключ продукта	Ключ: 9HJGH-GL7LT-27XHS-6EME0-68QTD
Оффлайн активация	☐ Активировать оффлайн

Активировать

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

Quick Filter

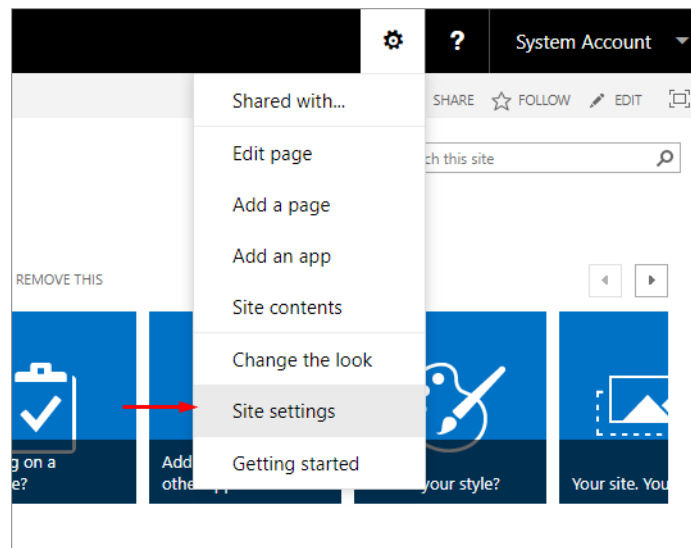|	
Статус	Активирован Продукт активирован. Дополнительных действий не требуется

Закрыть

5. Quick Filter setup
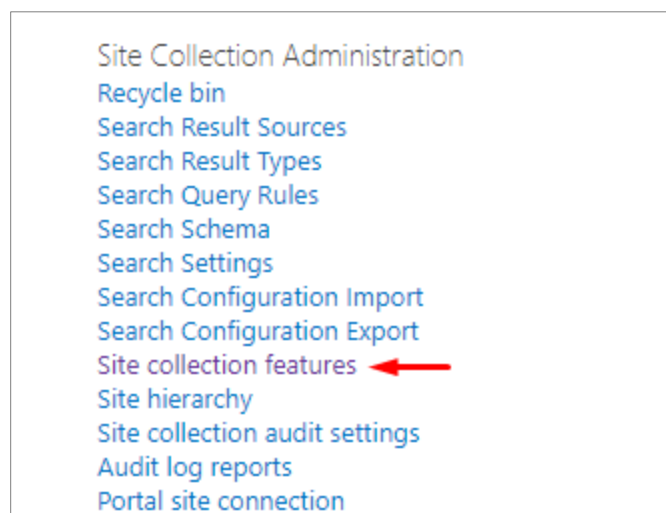
5.1 Site collection features activation

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

Open the SharePoint website where you want to use the Quick 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**:
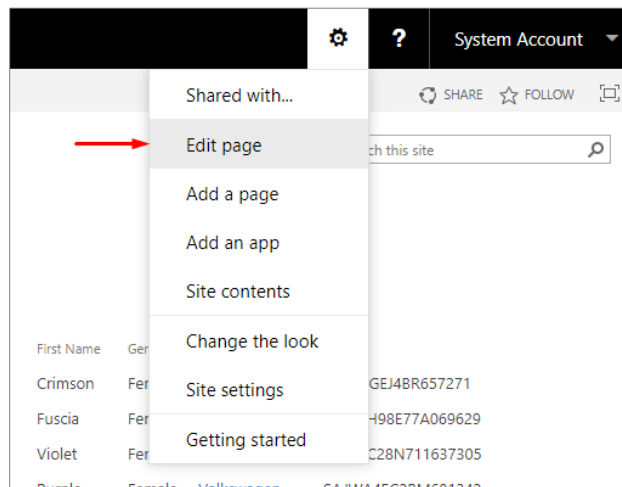
To activate the Quick Filter, click **Activate** next to **Vitextra: Quick Filter**:
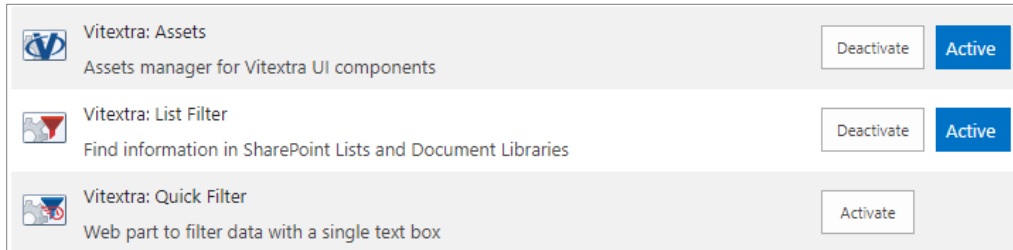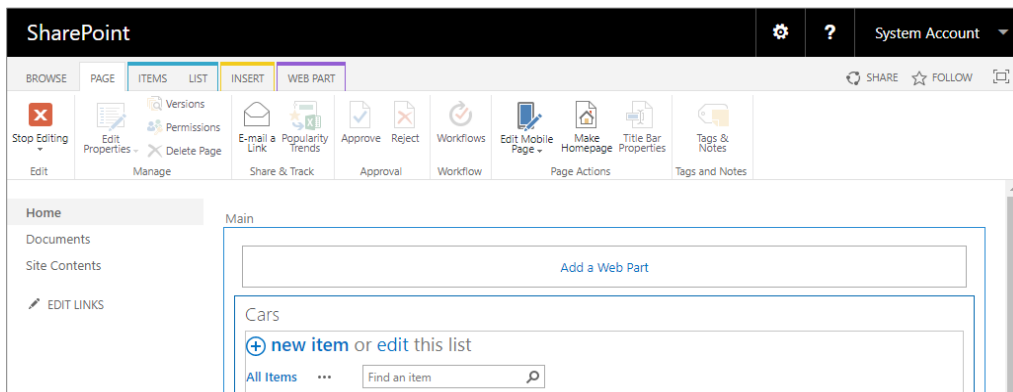

5.1 Adding the web part to a page

Go to the page where you want to add the Quick 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**):

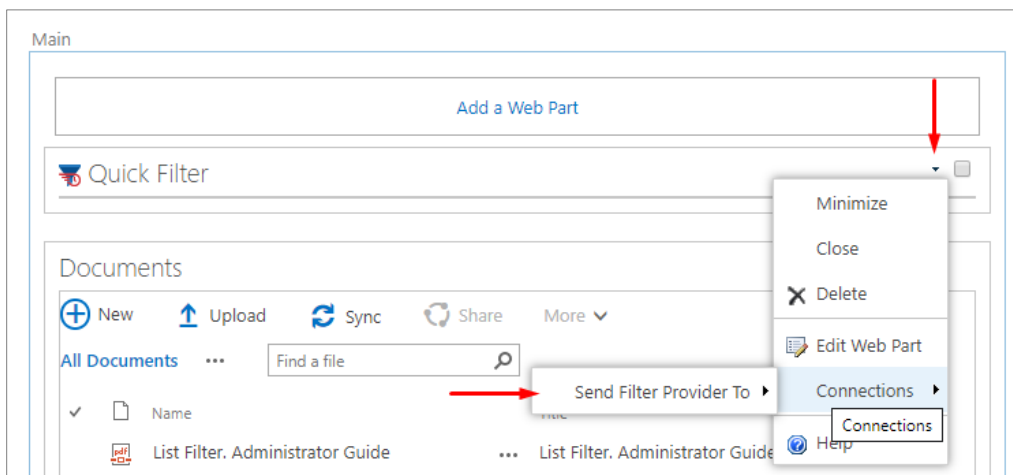Click **Add Web Part** to open the web part selection dialog:

Note

If you are adding the Quick 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 **Quick Filter** in the list of web parts, and click **Add**:
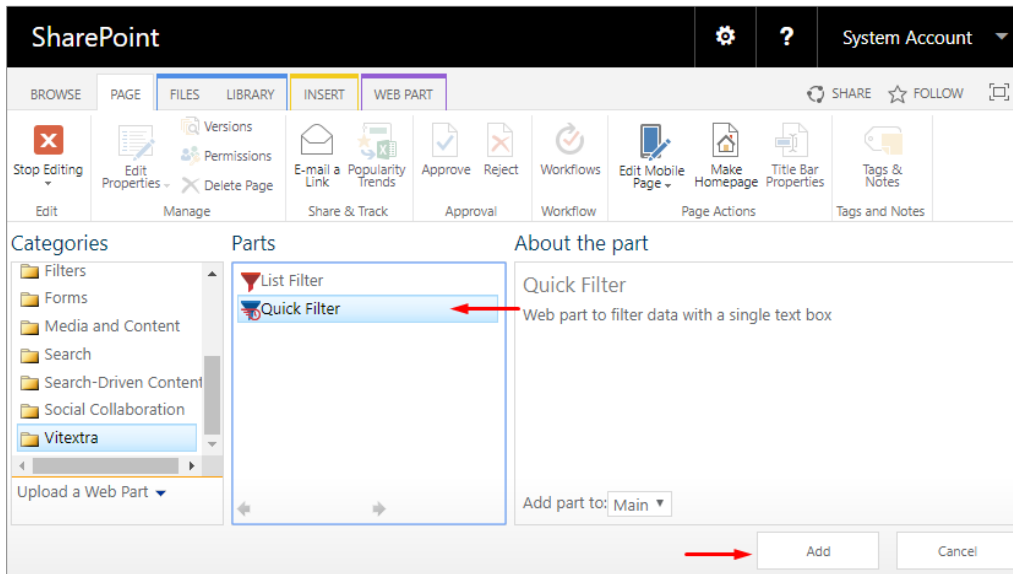

5.1 Quick Filter connection to a list/library

To use the Quick 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 box:

Select the connection type for Cars.

Connection Type: Get Parameters From ▾

Finish
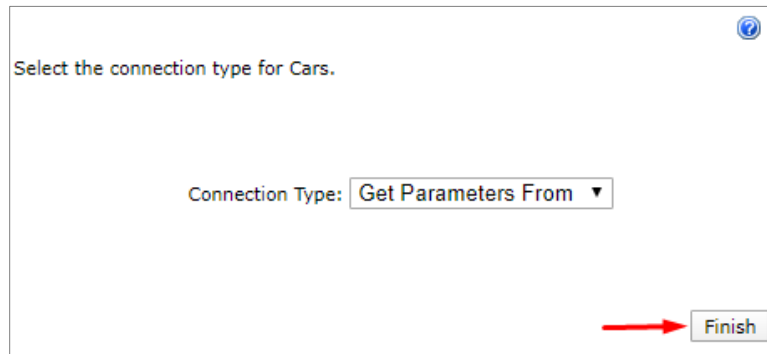
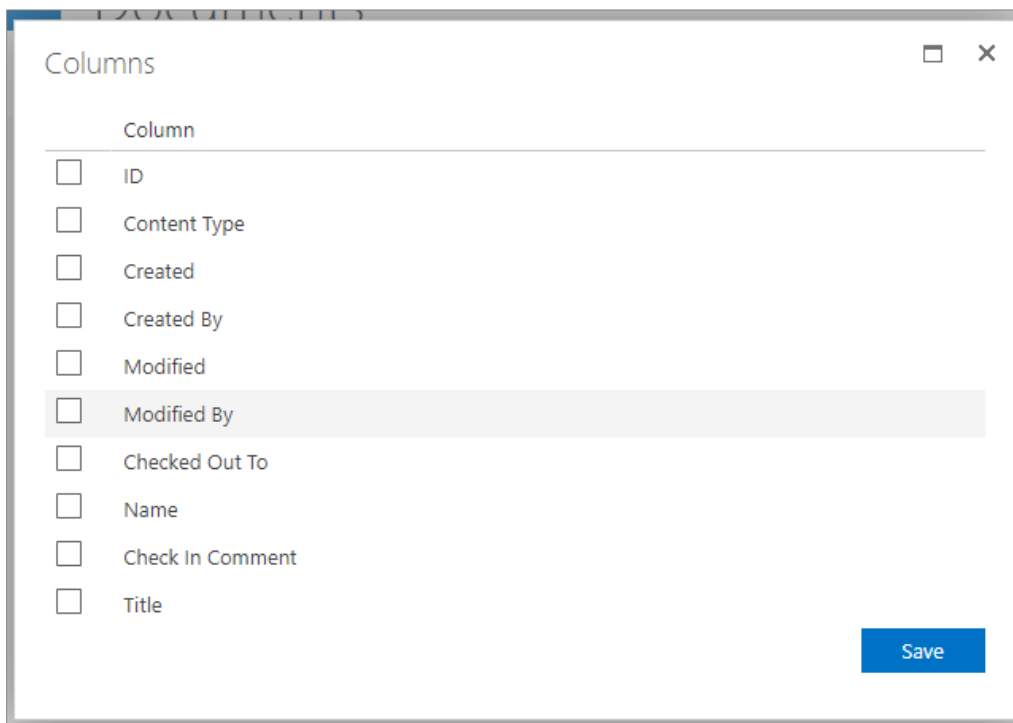Exit the page edit mode by clicking **Stop Editing** in the toolbar.
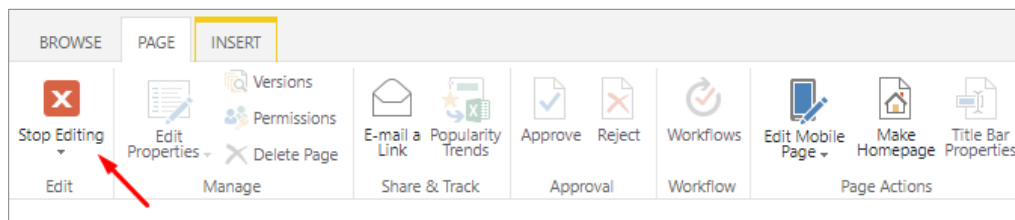
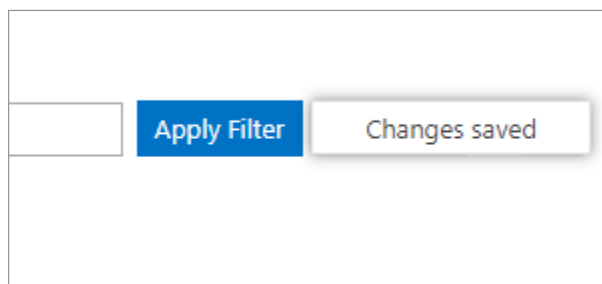## 5.1 Selecting fields for filtering

Open the field selection dialog by clicking ⚙ :

In the field selection dialog specify the fields that should be used for filtering.

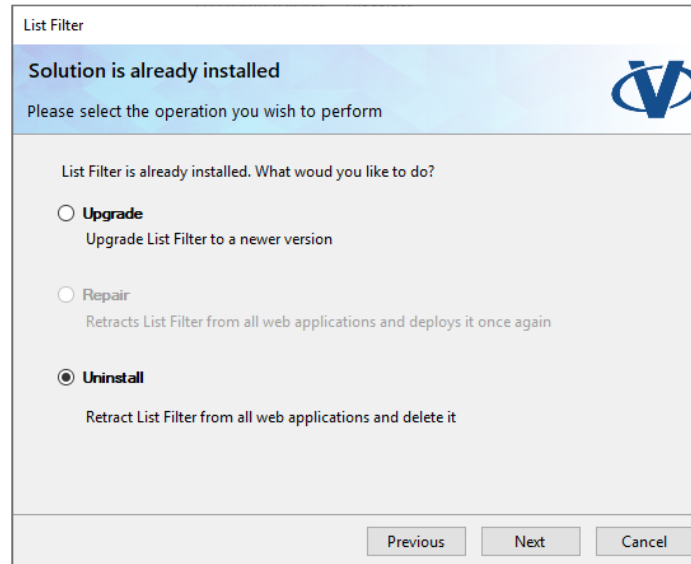Click **Save** to close the column setup dialog.

After saving, refresh the page to view the changes.

Note:

If no columns are selected, then filtering will be carried out by the ID field.

6. Uninstalling

To uninstall the Quick 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 Quick Filter?

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

Which browsers does the Quick Filter support?

Vitextra products support the following browsers:

- Microsoft Edge
- Google Chrome
- Firefox
- Safari

Do I have to reinstall the Quick 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 Vitextra 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 Quick Filter when migrating to new SharePoint versions?

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