



Collection Column 1.0

User Guide

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Our web site: <http://www.boostsolutions.com>

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1. Introduction

SharePoint Collection Column provides an easy way to view and manage related items in one SharePoint list, and is capable of calculations based on related items.

This user guide will guide you to install and configure Collection Column on your SharePoint.

For latest version of this copy or other user guides, please visit our document center:

<http://www.boostsolutions.com/download-documentation.html>

2. Installation

2.1 Product Files

After you download and unzip the Collection Column zip file from www.boostsolutions.com, you will find the following files:

Path	Descriptions
Setup.exe	A program that installs and deploys the WSP solution packages to the SharePoint farm.
EULA.rtf	The product End-User-License-Agreement.
Collection Column_V1_User Guide.pdf	User guide for Collection Column in PDF format.
Library\2.0\Setup.exe	The product installer for .Net Framework 2.0.
Library\2.0\Setup.exe.config	A file containing the configuration information for the installer.
Library\4.0\Setup.exe	The product installer for .Net Framework 4.0.
Library\4.0\Setup.exe.config	A file containing the configuration information for the installer.
Solutions\Foundation\BoostSolutions.FoundationSetup12.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Foundation\BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundation\BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundation\Install.config	A file containing the configuration information for the installer.
Solutions\CascadedEdit\BoostSolutions.CascadedEdit15.1.wsp	A SharePoint solution package containing Collection Column files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\CascadedEdit\Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

Before you install Collection Column, ensure your system meets the following requirements:

SharePoint 2013

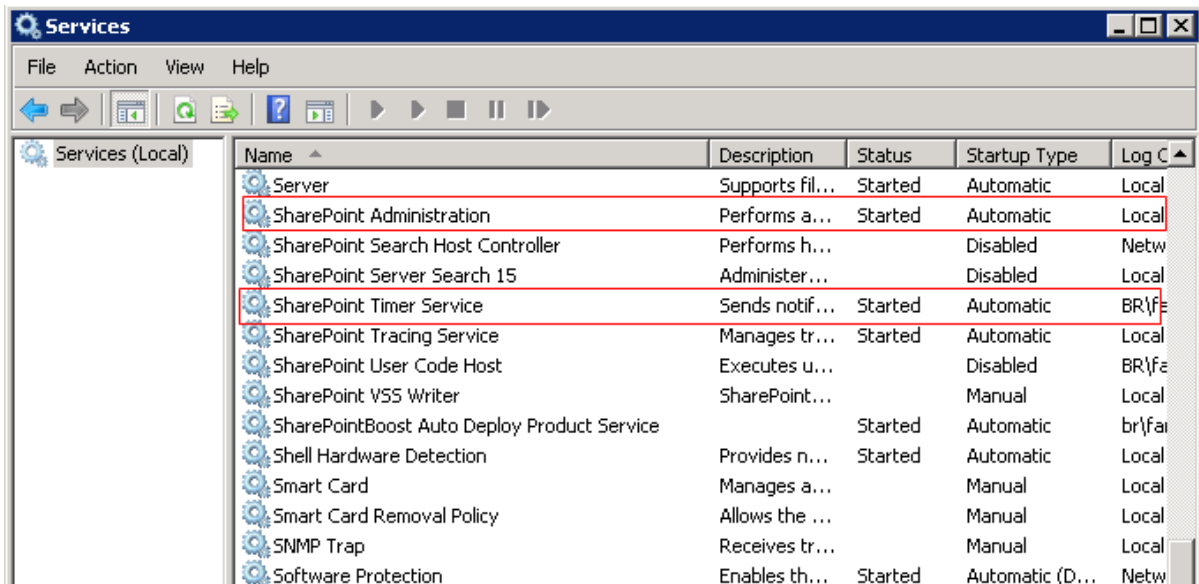
Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1
Server	Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5
Browser	Microsoft Internet Explorer 9 or later Mozilla Firefox Google Chrome

2.3 Installation

Follow these steps to install Collection Column on your SharePoint servers.

Installation Preconditions

Before you start installing the product, please make sure these services are started on your SharePoint servers: **SharePoint Administration** and **SharePoint Timer Service**.



Collection Column must be run on one front-end Web server in the SharePoint farm where **Microsoft SharePoint Foundation Web Application services** are running. Check **Central Administration** → **System Settings** for a list of servers running this service.

Required Permissions

To perform this procedure, you must have specific permissions and rights.

- Member of the local server's **Administrators** group.
- Member of the **Farm Administrators** group.

To install Collection Column on SharePoint server

- a. Download the zip file (*.zip) of the product of your choice from the BoostSolutions website, then extract the file.
- b. Open the created folder and run the **Setup.exe** file.

Note

If you cannot run the setup file, please right click the **Setup.exe** file and choose Run as administrator.

- c. A system check is performed to verify if your machine meets all the requirements for installing the product. After the system check is finished, click **Next**.
- d. Review and accept the End-User License Agreement and click **Next**.
- e. In the Web Application Deployment Targets, select the web applications you are going to install and click **Next**.

Note

If you select **Automatically activate features**, the product features will be activated in the target site collection during the installation process. If you want to manually activate the product feature later, uncheck this box.

- f. Upon completion of the installation, details are displayed showing which web applications you product has been installed to.
- g. Click **Close** to finish the installation.

2.4 Upgrade

Download the latest version of our product and run the **Setup.exe** file.

In the **Program Maintenance** window, select **Upgrade** and click **Next**.

2.5 Uninstallation

If you want to uninstall the product, double-click the **Setup.exe** file.

In the **Repair or Remove** window, select **Remove** and click **Next**. Then the application will be removed.

2.6 Command Line Installation

The following instructions are for installing the solution files for Collection Column in **SharePoint 2013** by using the SharePoint STSADM command line tool.

Required permissions

To use STSADM, you must be a member of the local Administrators group on the server.

To install Collection Column to SharePoint servers

If you have installed BoostSolutions products before, please skip the steps of Foundation installation.

- a. Extract the files from the product zip pack to a folder on one SharePoint server.
- b. Open a command prompt and make sure your path is set with the SharePoint bin directory.

- **SharePoint 2013**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\BIN

- c. Add the solution files to SharePoint in the STSADM command line tool.

```
stsadm -o addsolution -filename BoostSolutions.CascadedEdit15.1.wsp
stsadm -o addsolution -filename BoostSolutions.FoundationSetup15.1.wsp
```

- d. Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions.CascadedEdit15.1.wsp -allowgacdeployment -url
[virtual server url] -immediate
stsadm -o deploysolution -name BoostSolutions.FoundationSetup15.1.wsp -allowgacdeployment -
url [virtual server url] -immediate
```

- e. Wait for the deployment to complete. Check the final status of the deployment with this command:

```
stsadm -o displaysolution -name BoostSolutions.CascadedEdit15.1.wsp
```



```
stsadm -o displaysolution -name BoostSolutions.FoundationSetup15.1.wsp
```

The result should contain a <Deployed> parameter for which the value is TRUE.

- f. In the STSADM tool, activate the features.

```
stsadm -o activatefeature -name BoostSolutions.CascadedEdit -url [site collection url] -force
```

Note:

After install product using command line, you can check whether the product is installed and deployed successfully in Central Administration.

- a. On the Central Administration Home page, click **System Settings**.
- b. In the Farm Management section, click **Manage farm solutions**.
- c. On the Solution Management page, check whether the solution "BoostSolutions.CascadedEdit15.1.wsp" is deployed to the web applications.
- d. On the Solution Properties page, click **Deploy Solution**.
- e. On the Deploy Solution page, in the Deploy When section, select **Now**.
- f. In the Deploy To? section, in the A specific web application list, click either All web applications or select a specific Web application.
- g. Click OK.

To remove Collection Column from SharePoint servers

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.CascadedEdit15.1.wsp -immediate -url [virtual server url]
```

- b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

```
stsadm -o displaysolution -name BoostSolutions.CascadedEdit15.1.wsp
```

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

- c. Remove the solution from the SharePoint solutions storage:

```
stsadm -o deletesolution -name BoostSolutions.CascadedEdit15.1.wsp
```

Note:

After uninstall product using command line, you can check whether the product is removed and

successfully in Central Administration.

- a. On the Central Administration Home page, click **System Settings**.
- b. In the Farm Management section, click **Manage farm solutions**.
- c. On the Solution Management page, click "BoostSolutions.CascadedEdit15.1.wsp".
- d. On the Solution Properties page, click **Retract Solution**.
- e. On the Retract Solution page, in the Deploy When section, select **Now**.
- f. In the Retract From section, in the A specific web application list, click All content web applications.
- g. Click OK.
- h. Wait a minute, and refresh the browser until you see "Not Deployed" as the status for "BoostSolutions.CascadedEdit15.1.wsp".
- i. Select "BoostSolutions.CascadedEdit15.1.wsp".
- j. On the Solution Properties page, click **Remove Solution**.

To remove BoostSolutions Foundation from SharePoint servers

The BoostSolutions Foundation is mainly designed to provide a centralized interface to manage licenses for all BoostSolutions software from within SharePoint Central Administration. If are still using BoostSolutions product on your SharePoint server, please do not remove Foundation from the servers.

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.FoundationSetup15.1.wsp -immediate -url [virtual server url]
```

- b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

```
stsadm -o displaysolution -name BoostSolutions.FoundationSetup15.1.wsp
```

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

- c. Remove the solution from the SharePoint solutions storage:

```
stsadm -o deletesolution -name BoostSolutions.FoundationSetup15.1.wsp
```

2.7 Feature Activation

By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually.

- a. On the Site Actions menu, and click **Site Settings**.
- b. Under **Site Collection Administration** click **Site collection features**.
- c. Find the application feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.



BoostSolutions Collection Column 1.0.1120.0

Manage related items with specified columns and show calculation and aggregation results. (Powered by BoostSolutions)

Deactivate

Active

3. How to Use Collection Column

3.1 Create a Collection Column

- a. Open the list or library where you want to create a Collection Column. In the ribbon, click the **List** or **Library** tab. And click **Create Column** under the **Manage Views** group.
- b. In the **Name and Type** section, select **Collection Column** and type in a column name.

Column name:

The type of information in this column is:

- Single line of text
 - Multiple lines of text
 - Choice (menu to choose from)
 - Number (1, 1.0, 100)
 - Currency (\$, ¥, €)
 - Date and Time
 - Lookup (information already on this site)
 - Yes/No (check box)
 - Person or Group
 - Hyperlink or Picture
 - Calculated (calculation based on other columns)
 - External Data
 - Task Outcome
 - Collection Column (manage related items in the current list)
 - Choice Indicator (showing your choices as color indicators)
 - Cascaded Lookup
 - Managed Metadata
- c. In the **Source List** section, select the columns which you want to display in the current list from the source list.

You can set the columns as editable or view only in the current list. Once you set the columns as editable, any changes will be saved to the source list.

Source List

Select source list columns to be displayed in item form

Task List 

Column Name	Editable	View Only
ID	<input type="checkbox"/>	<input type="checkbox"/>
Task Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Modified	<input type="checkbox"/>	<input type="checkbox"/>
Created	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Modified By	<input type="checkbox"/>	<input type="checkbox"/>
Predecessors	<input type="checkbox"/>	<input type="checkbox"/>
Priority	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Task Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>
% Complete	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assigned To	<input type="checkbox"/>	<input type="checkbox"/>
Description	<input type="checkbox"/>	<input type="checkbox"/>
Start Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Due Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>

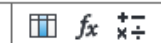
Here, the view only columns will be shown before the editable columns in the form.

- d. In the **Calculated Column** section, specify the expression name and the formula.

Calculated column

Specify the formula with which you want to calculate item data of source list.

Expression Name:



The expression name will be shown in the form as following:

Tasks	Task Name	Priority	Task Status	% Complete	Start Date	Due Date	Progress
	Task1	(1) High	Completed	1			0.25
	Task2	(1) High	In Progress	0.5			0.125
	Task3	(2) Normal	Not Started	0			0
	Task4	(2) Normal	Not Started	0			0
	Task5	(3) Low	Not Started	0			0
							Sum: 0.375

You can design the formula using the columns of source list. Also, there are more functions and operators, which can do more complex calculations.

For more details about Formula, please refer to Condition documentation (advanced mode section): <http://www.boostsolutions.com/pdf/Condition%20User%20Guide.pdf>

If you want to save the results, select the checkbox before Save to source list, and select a column to store the result.

Save to source list:

- e. In the **Total Settings** section, select the Total type for the column and specify whether to save the total in the current list, and select one column to save the total.

Note that all selected columns in Source List section will be listed here.

Total Settings

Set Totals and select columns in current list to store Total value.

Selected Columns

Task Name
Priority
Task Status
% Complete
Start Date
Due Date
Progress

Total Type

Count
None
None
None
None
None
None
Sum

Save Total to Current List

None
None
None
None
None
None
None
Percentage

And the total will be shown as following:

Task Name	Priority	Task Status	% Complete	Start Date	Due Date	Progress
Task1	(1) High	Completed	1			0.25
Task2	(1) High	In Progress	0.5			0.125
Task3	(2) Normal	Not Started	0			0
Task4	(2) Normal	Not Started	0			0
Task5	(3) Low	Not Started	0			0
						Sum: 0.375

- f. in the **Brief in list view** section, specify the brief of Collection Column that you want to show in the list view. You can specify the text or total value of the certain column.

Brief in list view

Specify the brief description that you want to show in list view under current column.

Insert column total value:

None
[Task Name]
[Progress]

- g. Click **OK** to save the column in the list.

3.2 Use Collection Column in list


In the item edit form, you can create, edit or delete related items as following:

Tasks

	Task Name	Priority	Task Status	% Complete	Start Date	Due Date	Progress
🗑	Task1	(1) High	Comple	1			0.25
🗑	Task2	(1) High	Comple	1			0.25
🗑	Task3	(2) Norr	In Progl	0.5			0.125
🗑	Task4	(2) Norr	Not Sta	0			0
							Sum: 0.625

Note that any changes will be saved to the source list.

In the list view, click the link of Collection Column, and you will enter the Collection Column page.

[All Items](#) ...  [SAVE THIS VIEW](#)

✓	Project		Start Date	Due Date	Priority	Status	Percentage	Tasks
	Project 1	...	11/10/2015	11/30/2015	High	In Progress	62.5 %	0.625

The collection column page will show details as following:

Project Tracking List:Tasks

Task Name	Priority	Task Status	% Complete	Start Date	Due Date	Progress
Task1	(1) High	Completed	1			0.25
Task2	(1) High	Completed	1			0.25
Task3	(2) Normal	In Progress	0.5			0.125
Task4	(2) Normal	Not Started	0			0
						Sum:
						0.625

Troubleshooting & Support

Troubleshooting FAQ:

<http://www.boostsolutions.com/general-faq.html#Show=ChildTitle9>

Contact Info:

Product & Licensing Inquires: sales@boostsolutions.com

Technical Support (Basic): support@boostsolutions.com

Request a New Product or Feature: feature_request@boostsolutions.com

Live chat:

<http://www.boostsolutions.com/support/chat/livezilla.php?intgroup=U3VwcG9ydA==&reset=true>

Appendix A: License Management

You can use Collection Column without entering any license code for a period of 30 days from when you first use it.

To use product after expiration, you will need to purchase a license and register the product.

Finding License Information

- a. Navigate to the **BoostSolutions Software Management** section in Central Administration. Then, click **License Management Center** link.
- b. Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).

Download License Information ×

Download the license type information and send to sales@boostsolutions.com to get license.

Choose a license type

Server License

Server Code: 24edc5f10a7f4ca091bbc0fab63d3eaab468c3b17
b5c44ee96d9b8e595000357

Farm License

Farm ID: {24edc5f1-0a7f-4ca0-91bb-c0fab63d3eaa}
Number of Users: 22 user(s)

Site Collection License

Site Collection ID: 38d6d052-0dab-43dc-a669-cdd5ad7d7f3d [Change](#)
Site Collection: <http://product2013/sites/Product Center>

Download

Close

In order for BoostSolutions to create a license for you, you need to send us your SharePoint environment identifier (Note: different license types need different information). A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection ID.

- c. Send the above information to us (sales@boostsolutions.com) to generate a license code.

License Registration

- a. When you receive a product license code, enter the **License Management Center** page.
- b. Click **Register** on the license page and a **Register or Update license** window will open.

Register or Update license

Please upload a license code file or enter the license code to activate the product.

Upload a license code file

Enter license code

- c. Upload the license file or enter the license code and click **Register**. You will get confirmation that your license has been validated.

Registered Successfully



Registered Successfully

- ▶ The license was verified successfully.
- ▶ Thank you for choosing BoostSolutions.

If you encounter any problems or would like to suggest a product requirement, please contact support@boostsolutions.com

For more details on license management, see the [BoostSolutions Foundation](#).