Collabion Charts
for SharePoint

Installation, Migration and Upgrade Guide

Contents

Overview

Collabion Charts for SharePoint provides a quick and easy way to create insightful dashboards in SharePoint, without writing a single line of code. It works with WSS 3.0, MOSS 2007 and all editions of SharePoint Server 2010, including Foundation server.

Collabion Charts for SharePoint can be installed and used to create charts and dashboards in less than 15 minutes. It has a wizard-based installation and charts are created using a GUI, which means you never need to write a line of code. Collabion Charts for SharePoint offers you a large number of chart types, stunning animations, high level of interactivity and support for drill-down.

Collabion Charts for SharePoint lets you create charts from data stored in SharePoint Lists, Lists Views, CSV string or files, MS SQL database, Oracle database, Excel file and BDC. Using the visual interface, you can visually specify the data filters using logical and date filters, group them into different data series and define drill-down.

Advantages

▶ **Renders in both JavaScript (HTML5) & Flash:** Charts are rendered using JavaScript (HTML5) and Flash, and hence work on all major platforms, browsers, and devices including iPhones and iPads. Collabion Charts for SharePoint automatically chooses the right mode to render the charts based on the device from which SharePoint is accessed.

▶ **Reduce the load on your servers:** In traditional charting systems, the charts are generated as images at the server-side - a heavy server side operation. Collabion Charts brings you great relief - all the charts are rendered at client side.

▶ **Filtering, grouping & drill-down supported:** Logical, boolean and date filters can be specified on data sets to narrow down the data to be plotted on the chart. Further, they can be re-grouped using a different set of parameters and then drill-down can be enabled based on this grouping. This allows you to slice, dice and visualize the data in any way you want, irrespective of how it is originally stored in SharePoint.

▶ **Lots of interactivity in charts:** The charts are highly interactive with tooltips, drill-downs, selective display of data and scroll & zoom capabilities, enabling a rich user experience.

▶ **Easy to use, without any code:** No coding required at all. Charts are created and edited using the visual wizard.

▶ **Supports multiple data sources:** The data to plot the charts can be retrieved from SharePoint Lists, Views, CSV string or files, MS SQL, Oracle, Excel & BDC with the same ease of use.

▶ **Extensively customizable cosmetics:** Visual aspects like fonts, colors, effects and animation of each element on the chart can be customized extensively using the wizard.

▶ **Can be exported as images/PDF:** Individual charts, or all charts on a page can be collectively exported as image or PDF for offline use. The charts can be printed as well.

▶ **Works with all SharePoint editions:** It works the same across WSS 3.0, MOSS 2007 & SharePoint 2010, including Foundation Server, on Windows Server 2003 & 2008, without the need for Excel Services.

Installation

Collabion Charts for SharePoint provides an easy installation process.

1. Download Collabion Charts for SharePoint
2. Check System Requirements
3. Start installation

Special Note to existing users of FusionCharts for SharePoint

If you are already using FusionCharts for SharePoint, please DO NOT UNINSTALL your existing installation of FusionCharts for SharePoint. Collabion Charts for SharePoint installs separately in your server and can co-exist with FusionCharts for SharePoint, so that you can export all the charts that you have created using FusionCharts for SharePoint into Collabion Charts for SharePoint. Once you import all the charts to Collabion Charts for SharePoint, you can uninstall FusionCharts for SharePoint. After you have installed Collabion Charts for SharePoint, perform all the steps mentioned in Migrating from FusionCharts for SharePoint to Collabion Charts for SharePoint section.

Special Note to existing users of Collabion Charts for SharePoint v0.9.9.0 (beta)

To upgrade from the beta version of Collabion Charts for SharePoint follow the steps of Upgrading to the latest version section.

Download Collabion Charts for SharePoint

Download Collabion Charts for SharePoint from
http://www.collabion.com/products/ccsp/download/

The download file varies based on the version of SharePoint you are using. Please select the appropriate download button.

[⬇ Download Collabion Charts for SharePoint® 2007 (or WSS 3.0)]

[⬇ Download Collabion Charts for SharePoint® 2010]

System Requirements

The server-side and client-side requirements for Collabion Charts for SharePoint are:

Server-side requirements:

▸ Microsoft Office SharePoint Server 2007/ WSS 3.0 or
   SharePoint Server 2010 or SharePoint Foundation Server 2010

▸ .NET Framework 3.5 Service Pack 1

Client-side requirements:

▸ Web Browser – Internet Explorer 6+, Firefox 3+, Google Chrome, Safari, Opera
   (Flash charts require Flash Player 8 and above)

Installation steps

After you have downloaded the required file, all you would need to do is:

1. Copy the downloaded file to the PC in which SharePoint server is installed
2. Extract the downloaded zip file in a folder
3. Run (as Administrator) the Setup (Setup.exe) file found in the extracted folder

Setup runs you through a wizard that helps you install and deploy Collabion Charts for SharePoint in a few simple steps. As the first step, you will see a welcome screen as shown below:

Collabion Charts for SharePoint®

This setup wizard will install and deploy Collabion Charts for SharePoint® to your SharePoint farm.

Previous   Next   Abort

www.codeplex.com/sharepointinstaller

The installation wizard checks the system for required resources as shown below:

Collabion Charts for SharePoint®

- ✓ Windows SharePoint Service 3.0 is installed.
- ⇨ Do you have permission to install and deploy SharePoint solutions?
- Is the Windows SharePoint Services Administration service started?
- Is the Windows SharePoint Services Timer service started?
- Does the solution file exist?
- Detecting Collabion Charts for SharePoint®

Please wait...

Previous   Next   Abort

www.codeplex.com/sharepointinstaller

NOTE: If System Check detects an existing installation of Collabion Charts for SharePoint (as shown in the image below), you need to uninstall it first and start the installation process again. For more details on uninstalling, check uninstallation steps?
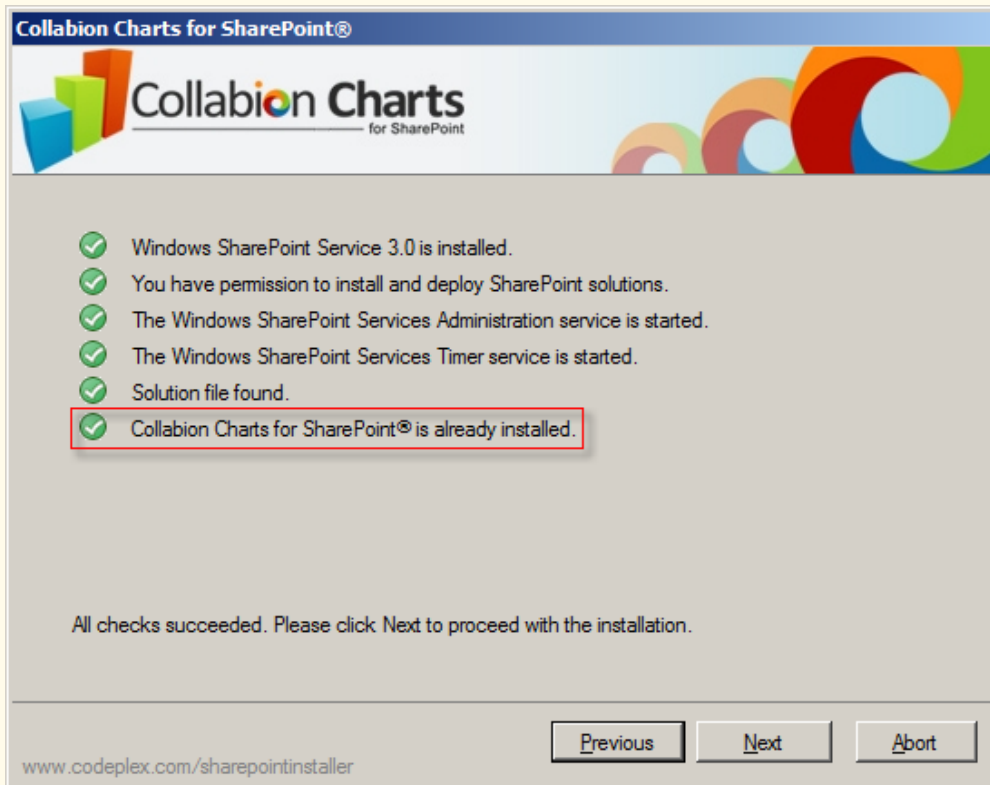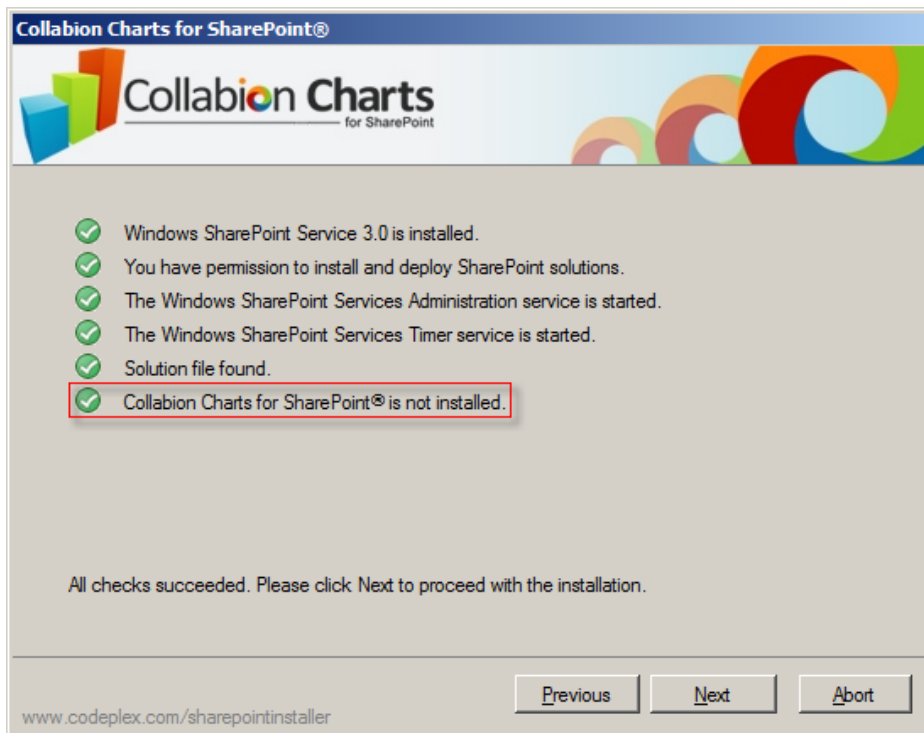
Once the System Check is successfully completed, click Next.

System Check is followed by End-User License Agreement screen as shown below:
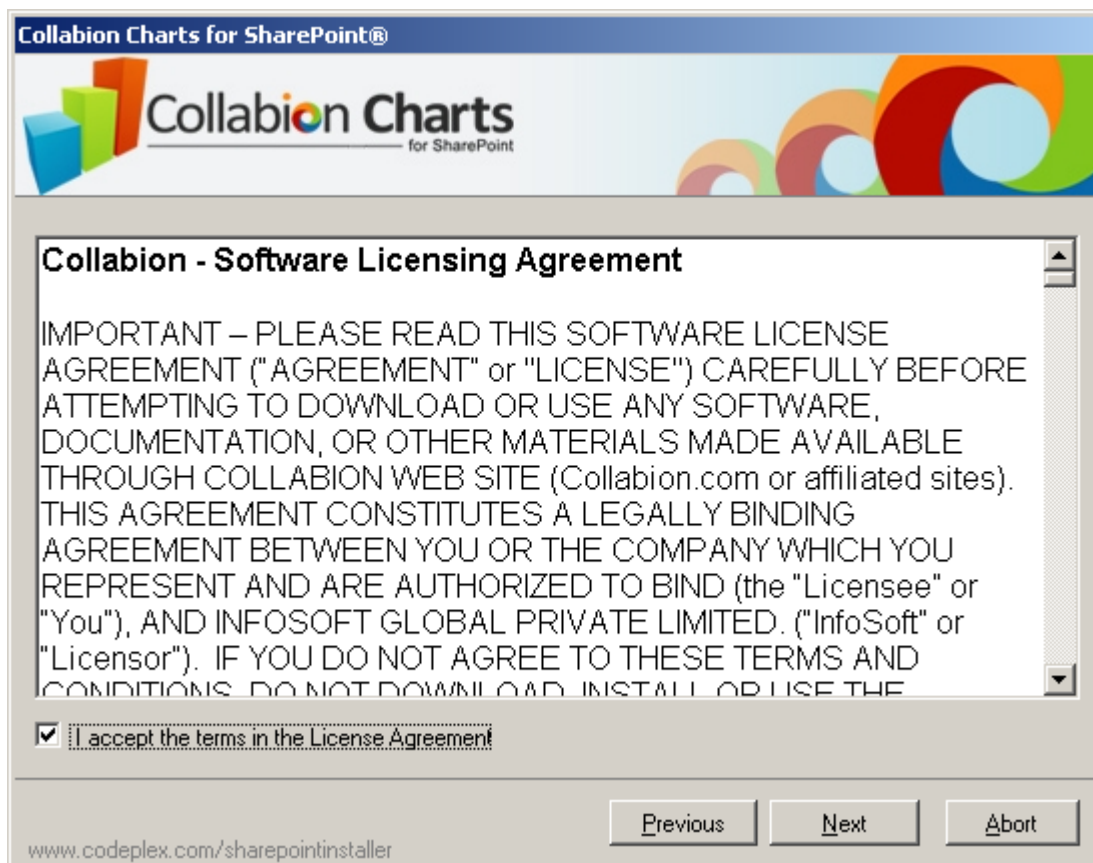
Select the "I accept the terms in the License Agreement" check box to accept the terms in the license agreement and click Next to proceed.

The Site Collection Deployment Targets screen appears as shown below:

Select one or more web applications / site collections where you want to install Collabion Charts for SharePoint. Click Next.

NOTE: By default the Activate feature in selected site collection(s) / web application(s) check-box is selected. This ensures that the feature will be activated in all the site collection(s)/web application(s). For example, in case of the above screenshot the feature will be activated in all the 3 site collections of SharePoint-81 web application. However you can also opt to manually activate the feature in individual site collections. To know more click here.

The installation starts and is indicated by a progress bar as shown below:
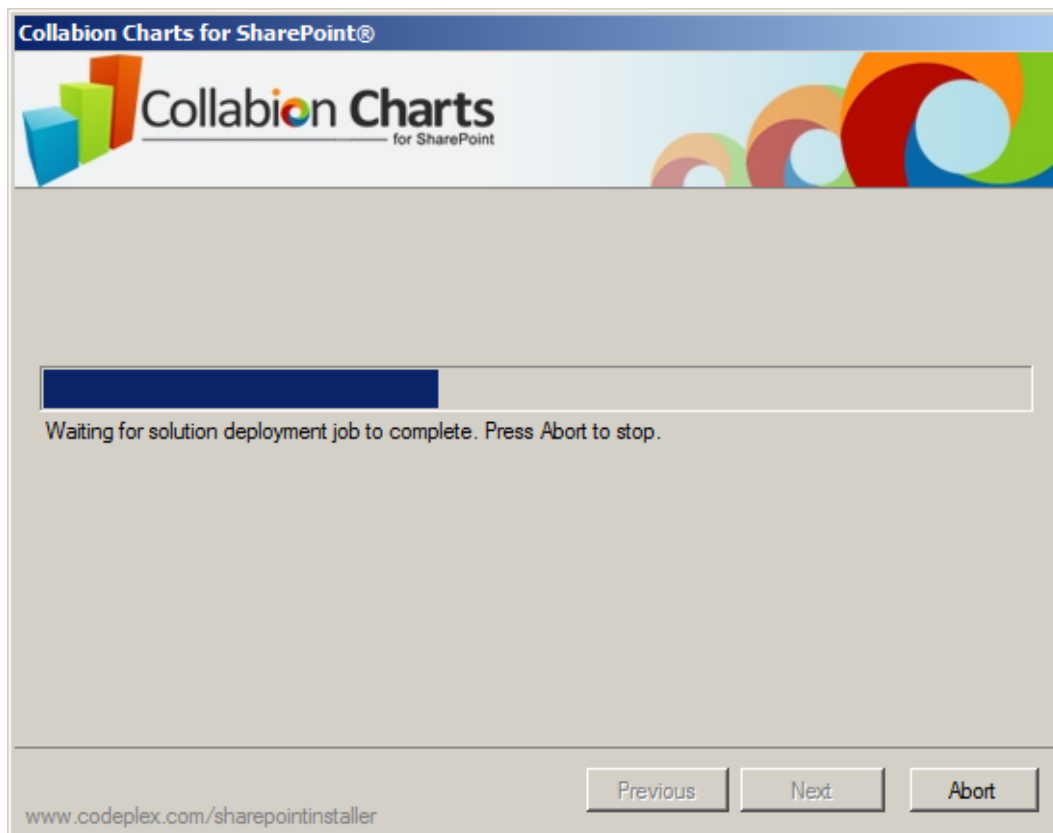
On successful installation, "All operations successfully completed." message is displayed as shown below:
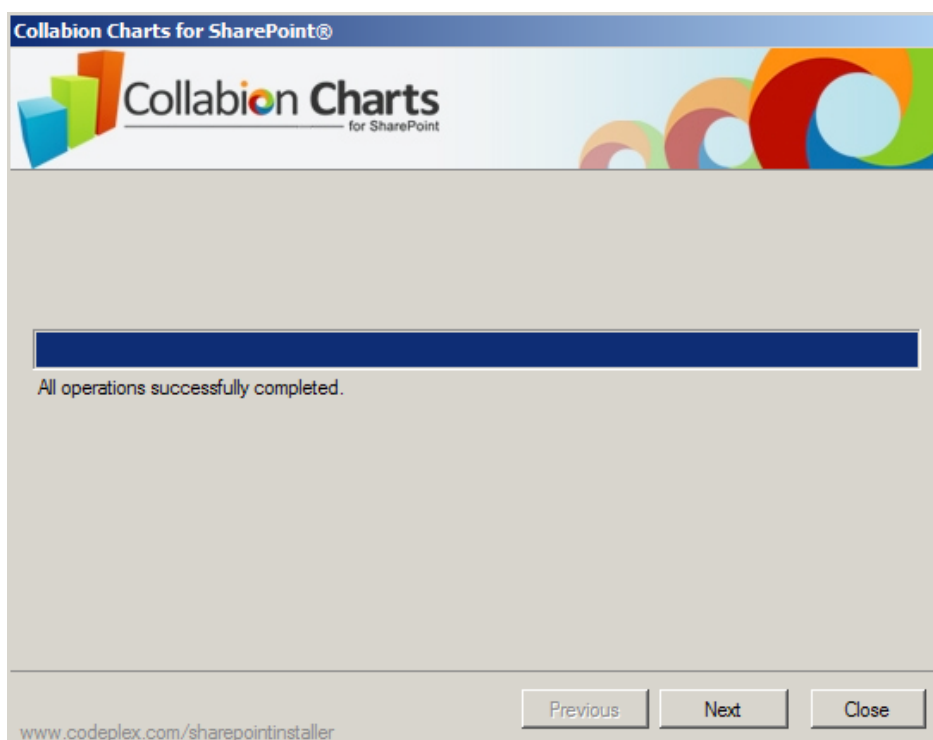
This completes the installation and deployment of Collabion Charts for SharePoint. Click Next.

The **Installation Successfully Completed** screen appears showing more details on the location where you have installed Collabion Charts for SharePoint.
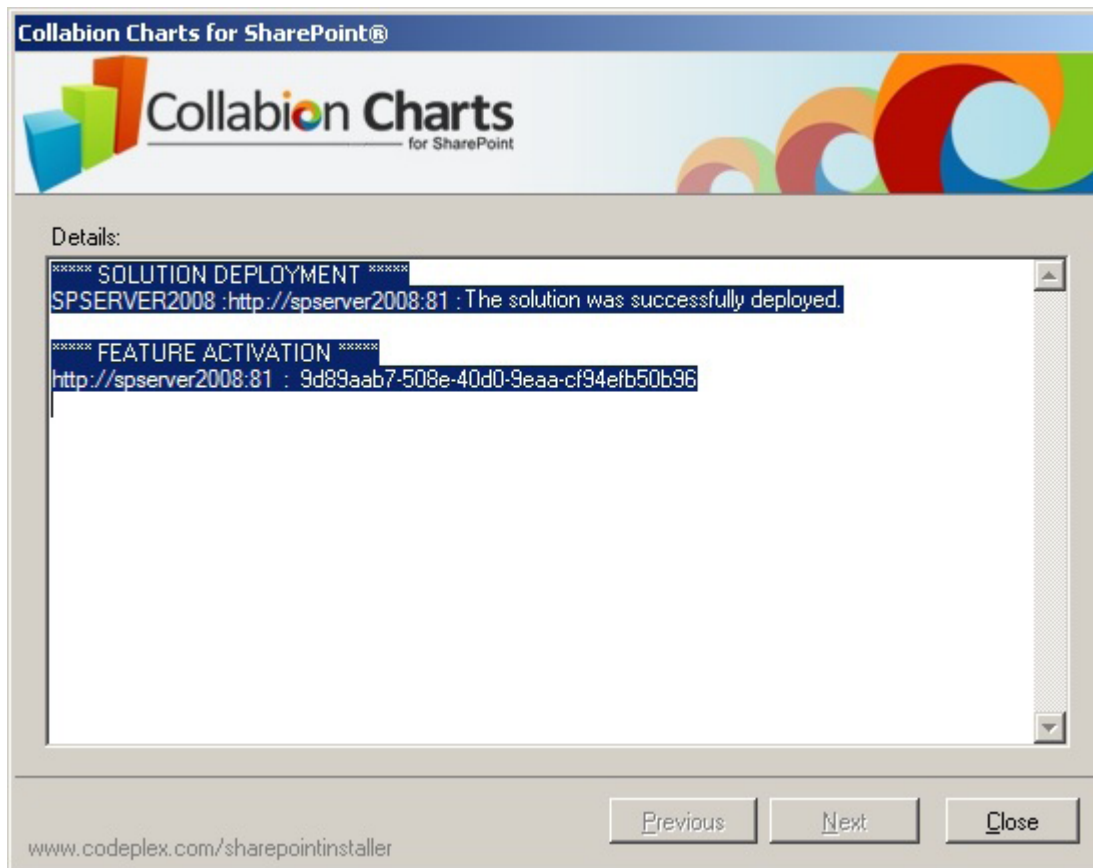
Click Close to exit the wizard.

This completes installation of Collabion Charts for SharePoint. Please keep the downloaded installation file in a safe location, as you might require it to repair or uninstall the existing installation.

Manual Activation process

Earlier we have discussed that by default the Activate feature in selected site collection(s)/ web application(s) checkbox is selected. You can also opt to manually activate the feature in individual site collections after installation. To do this, clear the Activate feature in selected site collection(s)/web application(s) checkbox at the time of installation. After the installation is completed follow the steps given below:

In MOSS 2007/WSS 3.0:

1. Open the default root site collection.
2. Click **Site Actions** drop down list on the top right corner of the page.
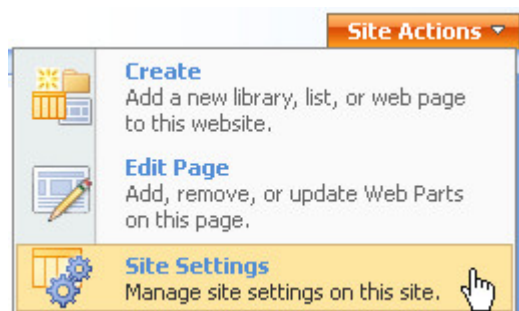
3 Select **Site Settings**.

5. Click **Activate** beside the site for which you want to activate.

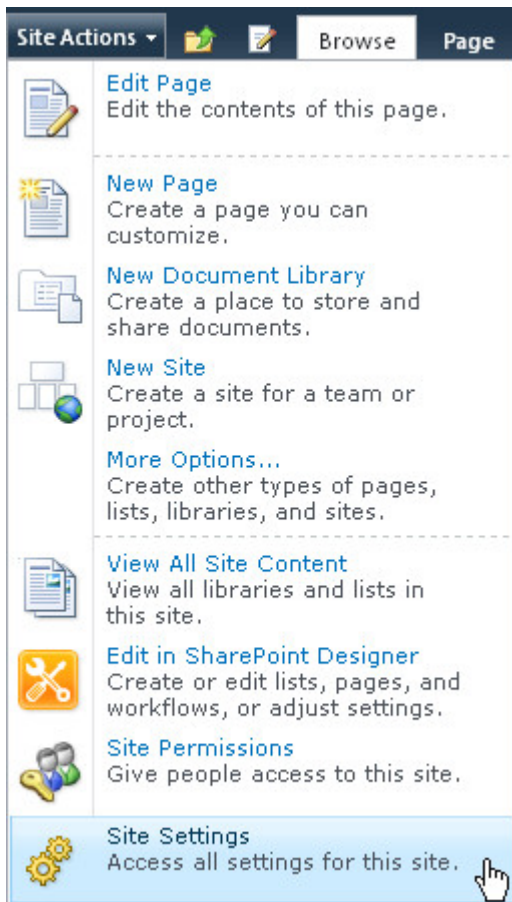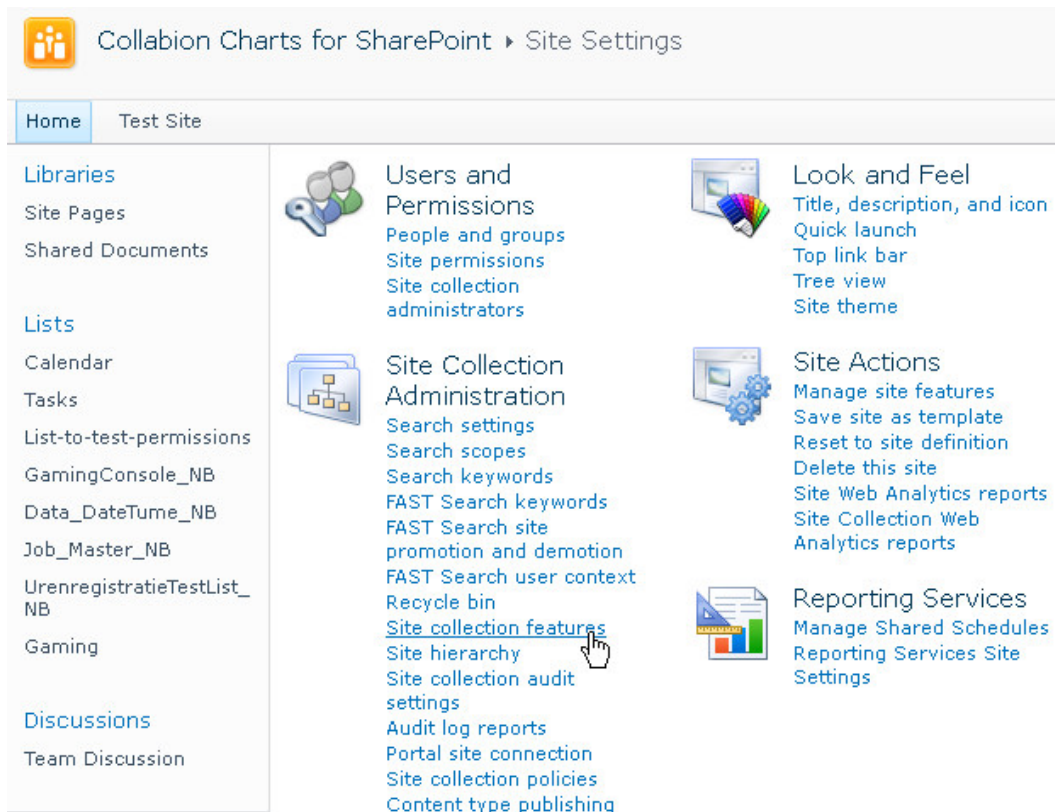   For example - CollabionCharts for SharePoint.

1. Open the default root site collection.
2. Click **Site Actions** drop down list on the top left corner of the page.

3 Select **Site Settings**.

4. Under **Site Collection Administration** section, click **Site collection features**.

5. Click **Activate** beside the site for which you want to activate.

For example - CollabionCharts for SharePoint.

What's next?

Once installed, you will find a Web Part group named Collabion Charts for SharePoint available in the Web Part gallery. To create a chart, you need to add Collabion Charts for SharePoint Web Part in your page.
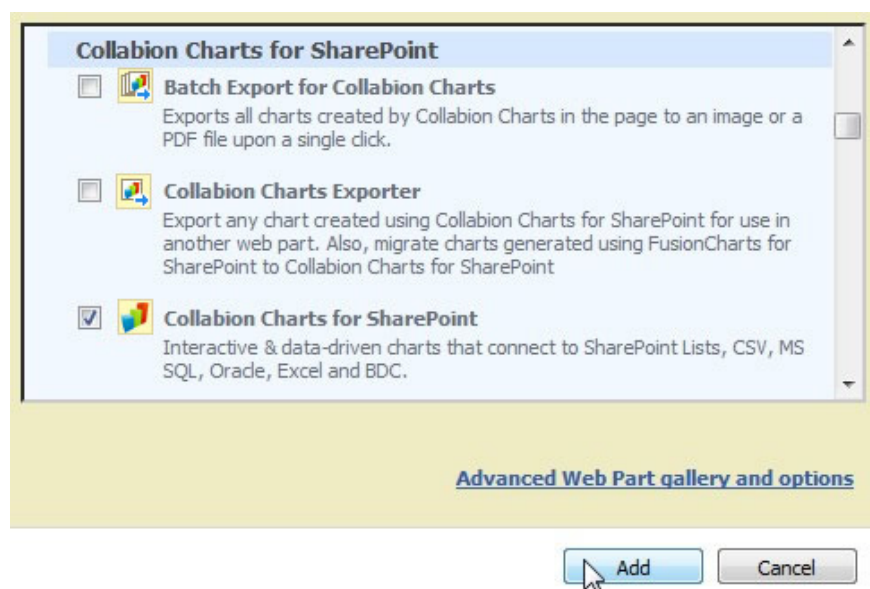
There are two other Web Parts available in the Web Part galley.

1. Batch Export for Collabion Charts: Select this Web Part export all the Collabion charts present in a page as images.

2. Collabion Charts Exporter: Select this Web Part to export charts created in a page for use in other Web Parts. You can also use it for migrating charts created using FusionCharts for SharePoint (the earlier name of Collabion Charts for SharePoint) to Collabion Charts for SharePoint. To know more on how to migrate charts from FusionCharts for SharePoint to Collabion Charts for SharePoint, read Migrating from FusionCharts for SharePoint to Collabion Charts for SharePoint.

Uninstallation steps

Uninstalling Collabion Charts for SharePoint also involves the same wizard used for installing it.

> NOTE: The uninstallation process does not remove the charts created using Collabion Charts for SharePoint, so that you can get the charts back when you re-install Collabion Charts for SharePoint. However, if you want to remove the charts, you need to remove the chart Web Parts from your pages.

To uninstall, do the following:

1. Copy the downloaded file of Collabion Charts for SharePoint to the PC in which SharePoint server and Collabion Charts for SharePoint is installed
2. Extract the downloaded zip file to a folder
3. Run (as Administrator) the Setup (Setup.exe) file found in the extracted folder.

Setup runs you through a wizard that helps you uninstall Collabion Charts for SharePoint. As the first step, you will see a welcome screen as shown below:
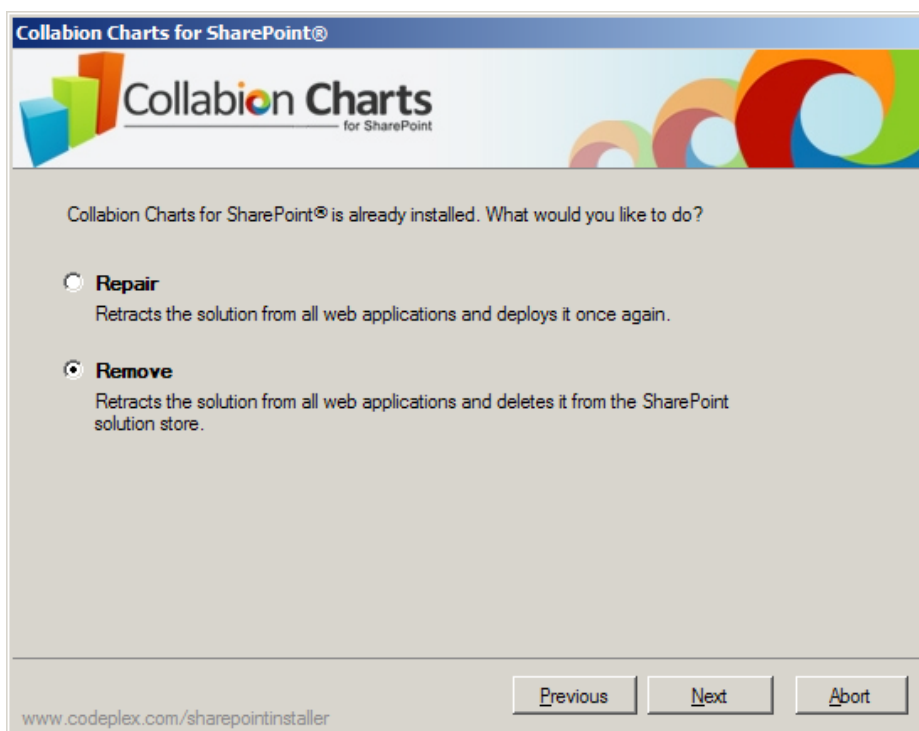

Click Next. The wizard checks the system for existing installation of Collabion Charts for SharePoint.
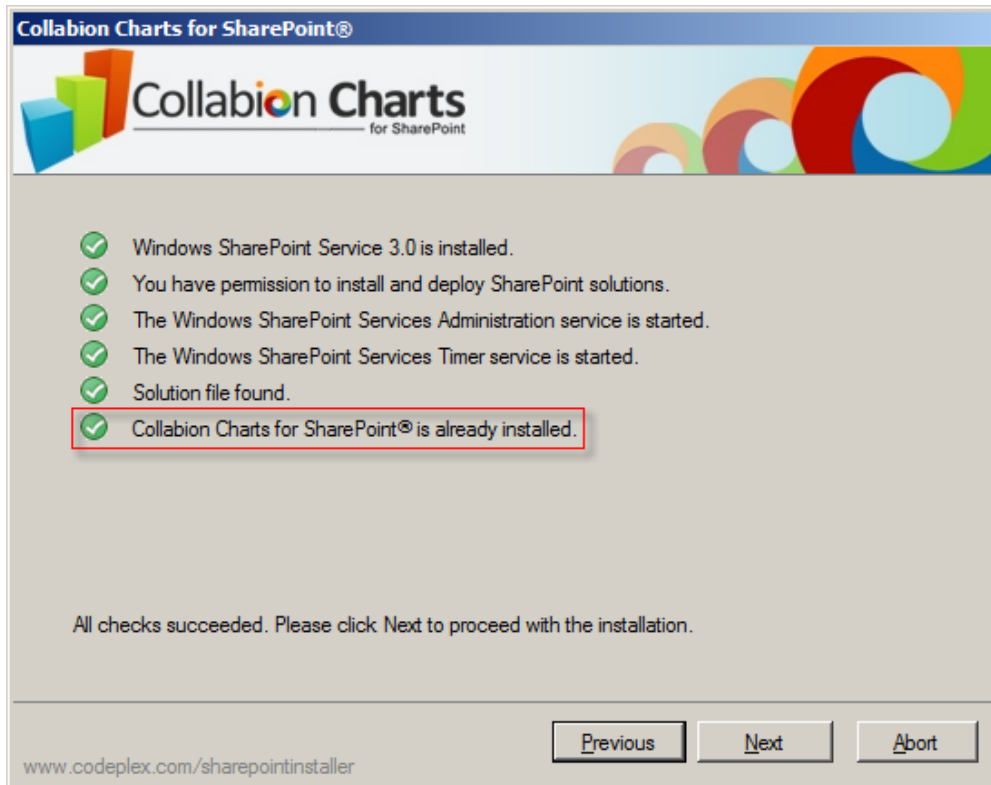
Once the system check is complete, the wizard shows a message stating, "Collabion Charts for SharePoint is already installed". Click Next.
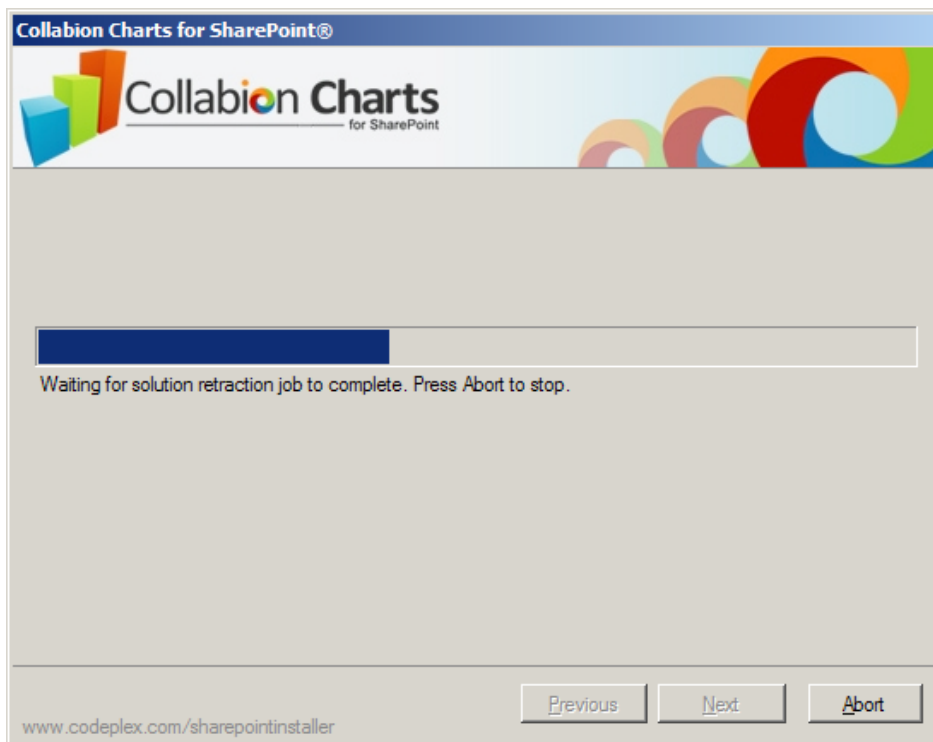
The Repair or Remove screen appears as shown below:

Select Remove and click Next to begin the uninstallation process.

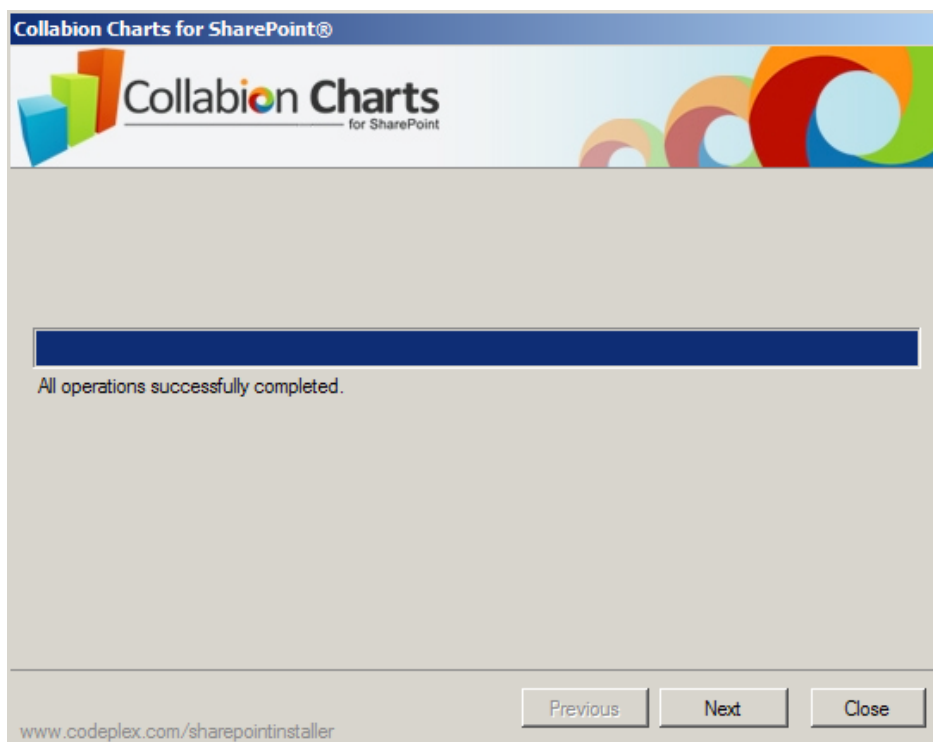The uninstallation process starts and is indicated by a progress bar as shown below:

On successful uninstallation, "All operations successfully completed." message is displayed as shown below:
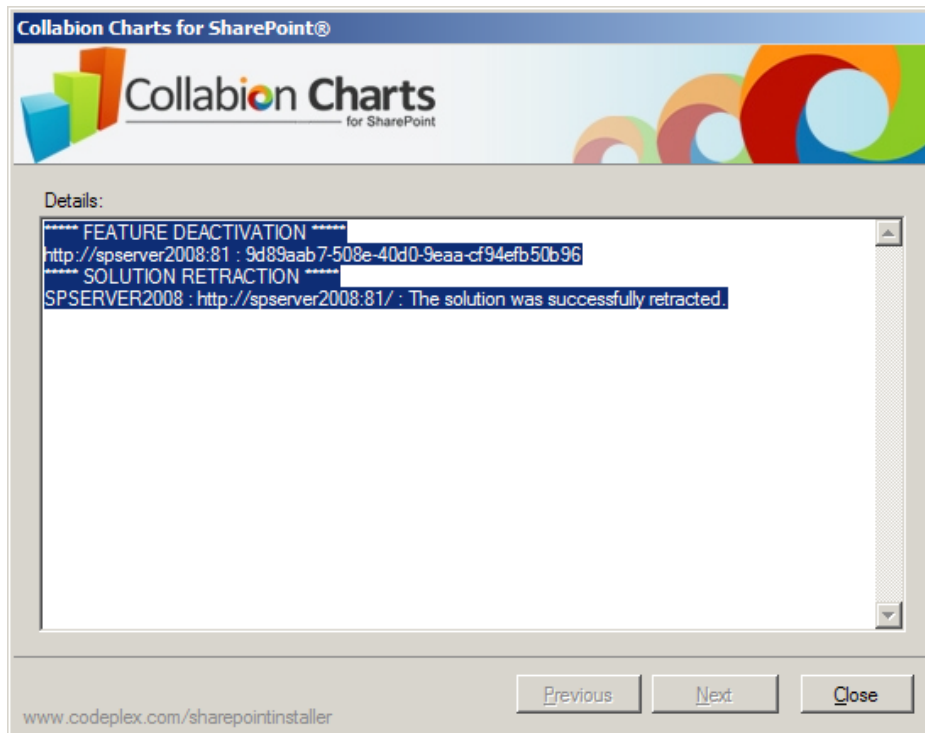

This completes the uninstallation process. Click Next.

The Uninstall Successfully Completed screen appears showing more details.



Click **Close** to exit the wizard.

Upgrading to the latest version

Existing users of Collabion Charts for SharePoint Beta 1 need to follow the steps given below to upgrade to the next version:

After you have downloaded the required file, all you would need to do is:

1. Copy the downloaded file to the PC in which SharePoint server is installed
2. Extract the downloaded zip file in a folder
3. Run (as Administrator) the Setup (Setup.exe) file found in the extracted folder

Setup runs you through a wizard that helps you install and deploy Collabion Charts for Share-Point in a few simple steps. As the first step, you will see a welcome screen as shown below:
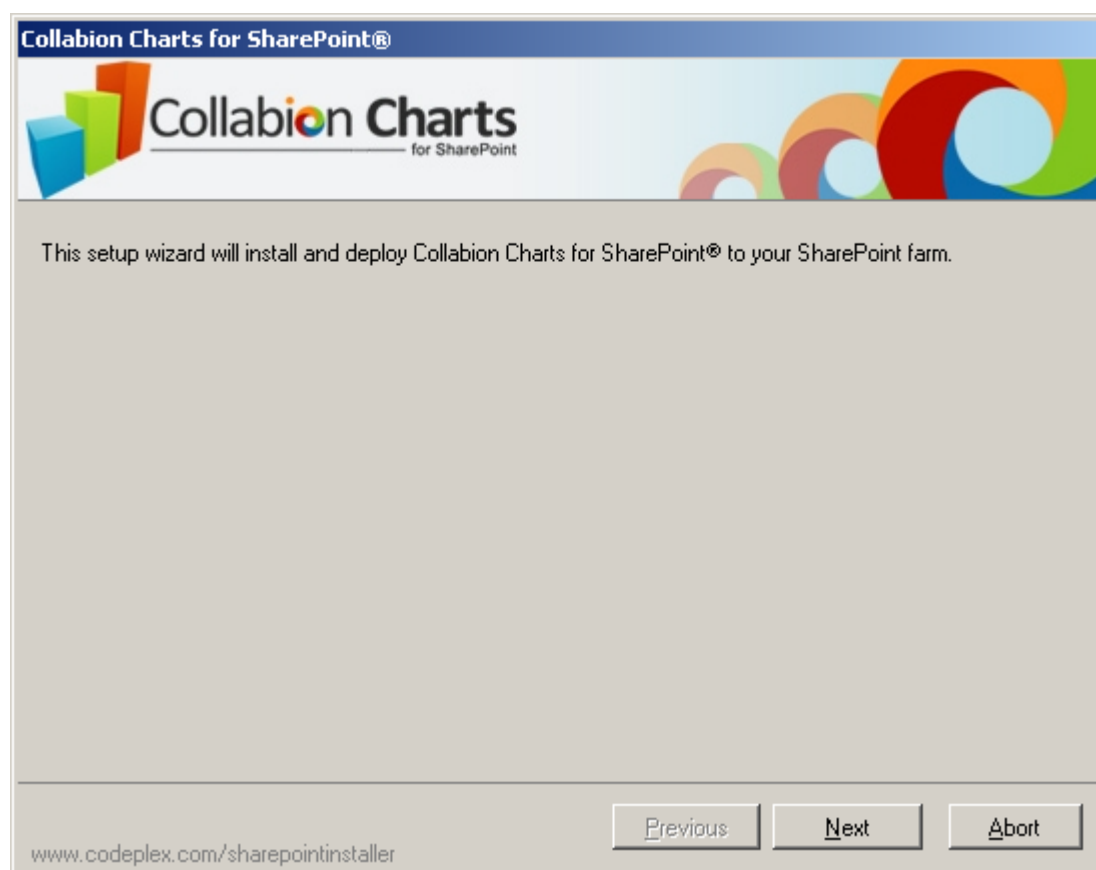
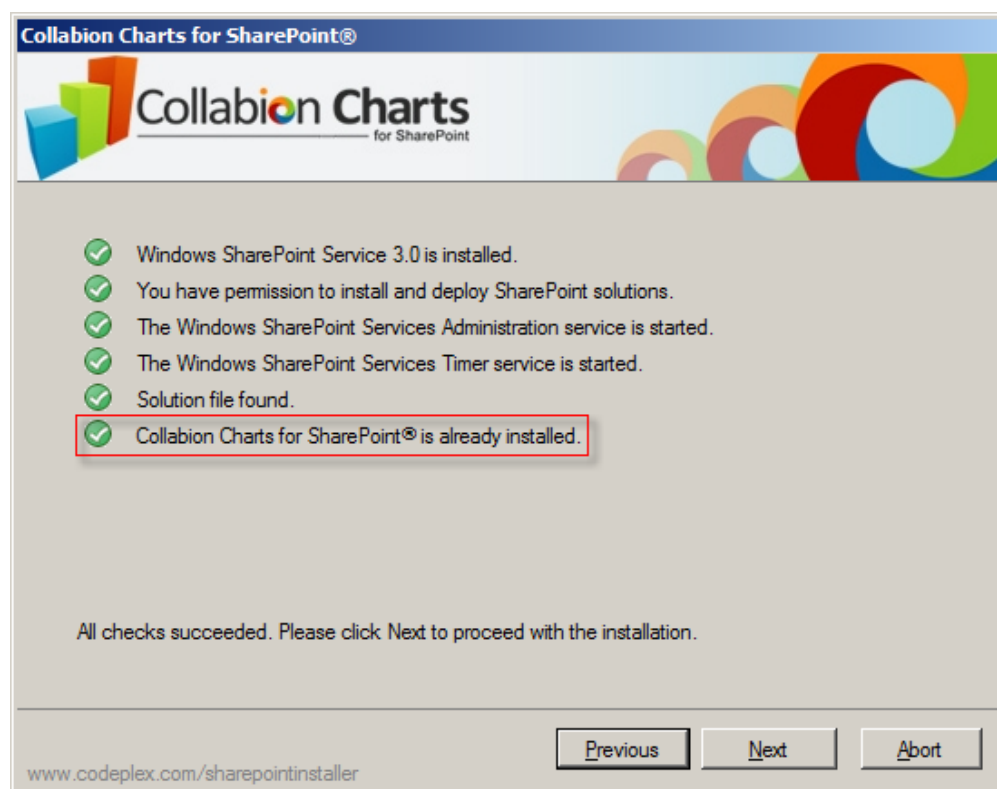Click **Next** to proceed to the next step.

The installation wizard checks the system for required resources as shown below:

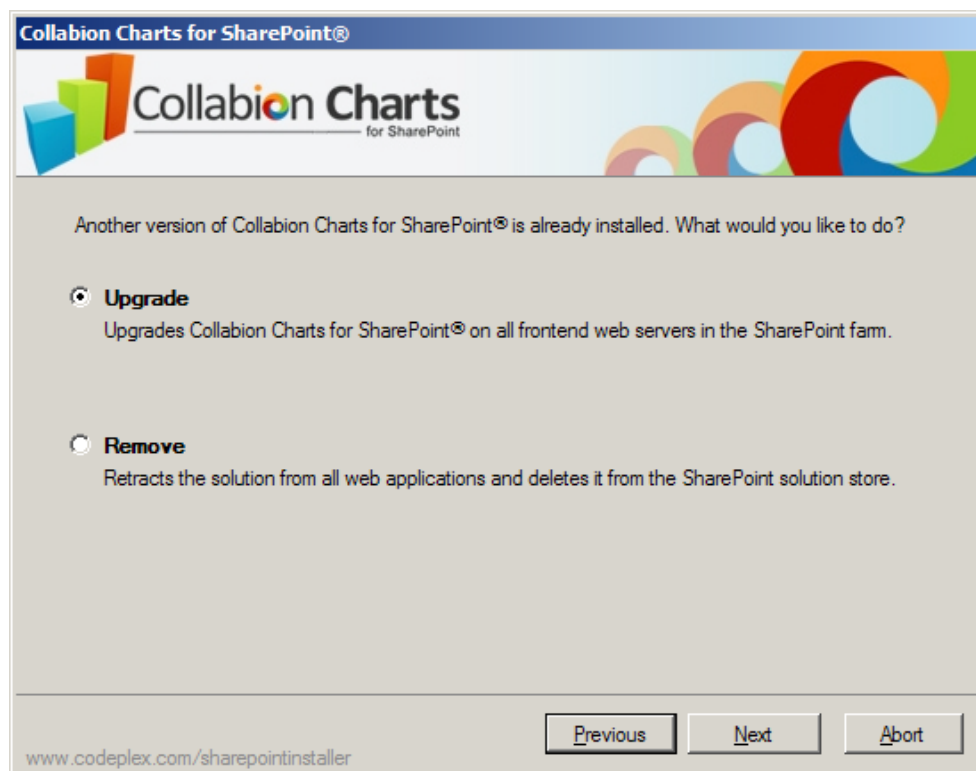
System Check will detect an existing installation of Collabion Charts for SharePoint as shown in the image below:
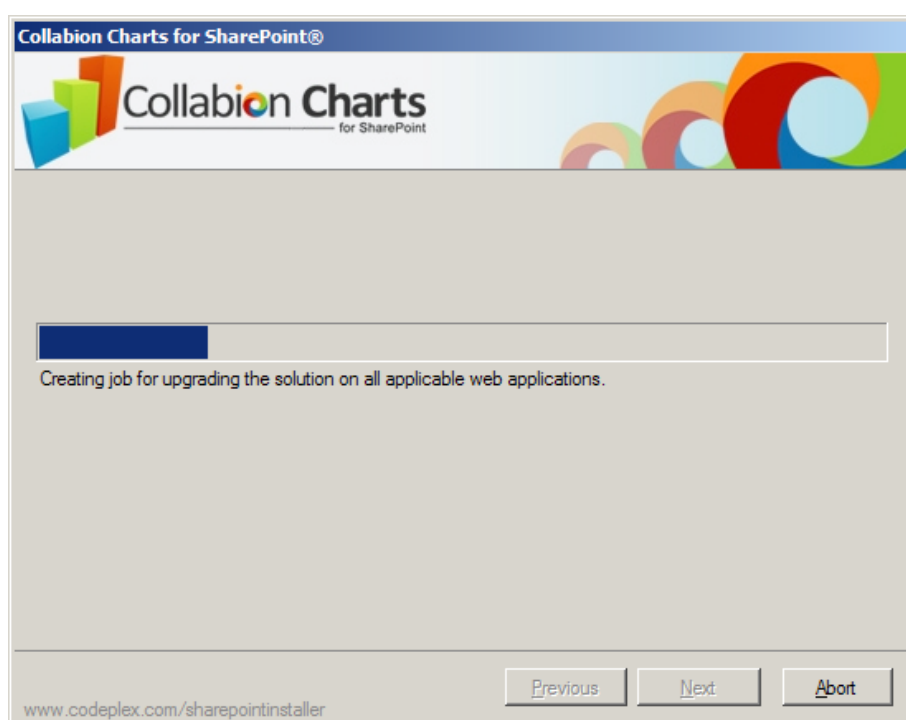

Click Next.

The upgrade or remove screen appears as shown below:

By default, the Upgrade radio button is selected click Next.

> NOTE: To remove follow the steps mentioned in <u>uninstallation steps?</u>

The upgrade starts and is indicated by a progress bar as shown below:

On successful upgrade, "All operations successfully completed." message is displayed as shown below:
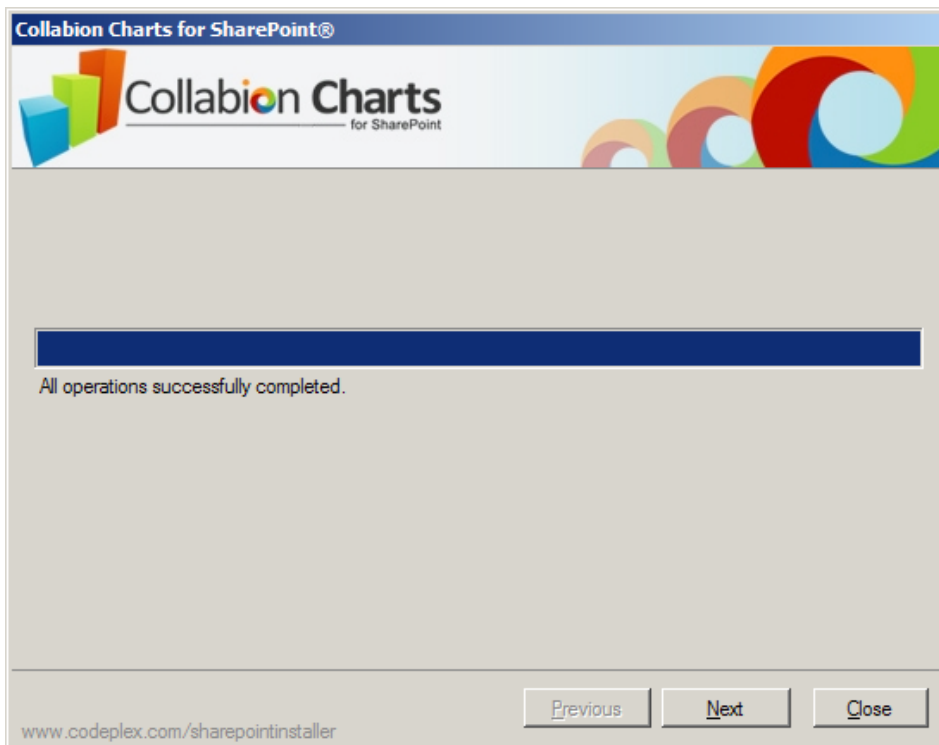
This completes the upgradation of Collabion Charts for SharePoint. Click Next.

The Upgrade Successfully Completed screen appears showing more details on the location where you have installed Collabion Charts for SharePoint.
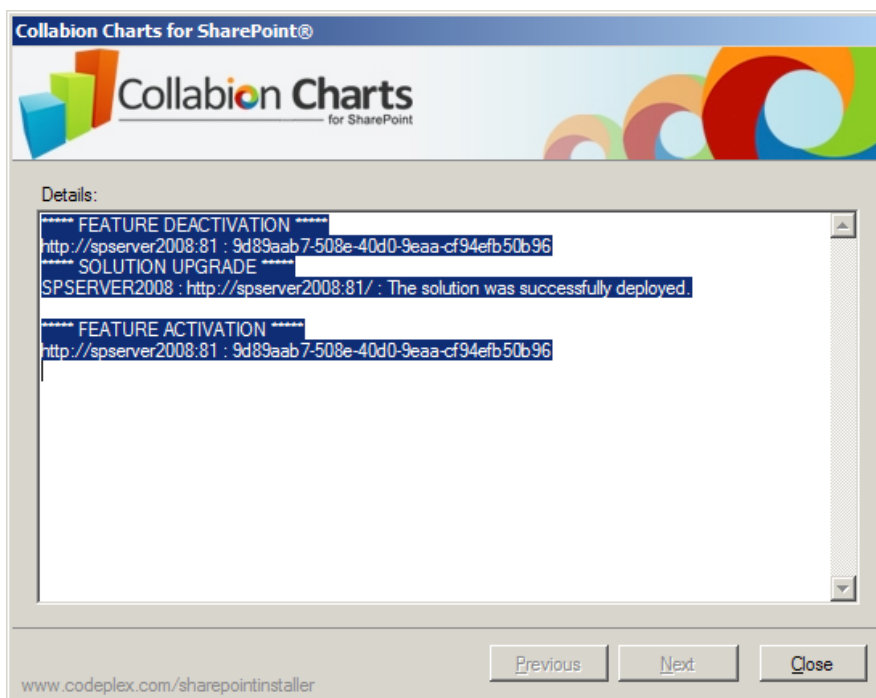
Click Close to exit the wizard.

Migrating from FusionCharts for SharePoint to Collabion Charts for SharePoint

NOTE: This section is for those who have evaluated FusionCharts for SharePoint and wish to move the charts created using FusionCharts for SharePoint to Collabion Charts for SharePoint.

FusionCharts for SharePoint (discontinued) is renamed as Collabion Charts for SharePoint. Collabion Charts for SharePoint installs separately in your server and can co-exist with FusionCharts for SharePoint, so that you can export all the charts that you have created using FusionCharts for SharePoint into Collabion Charts for SharePoint. Once you import all the charts to Collabion Charts for SharePoint, you can uninstall FusionCharts for SharePoint.

The steps involved:

1. Add Exporter Web Part
2. Export existing charts
3. Import charts to Collabion Charts for SharePoint
4. Uninstall FusionCharts for SharePoint

Let's walk through the steps in details.
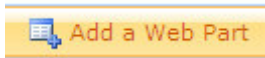
Add Exporter Web-Part

Collabion Charts for SharePoint provides an Export Web Part that helps in exporting all the charts created using FusionCharts for SharePoint. Do the following to add this Web Part:

1. Open the web page that contains the charts created using FusionCharts for SharePoint.

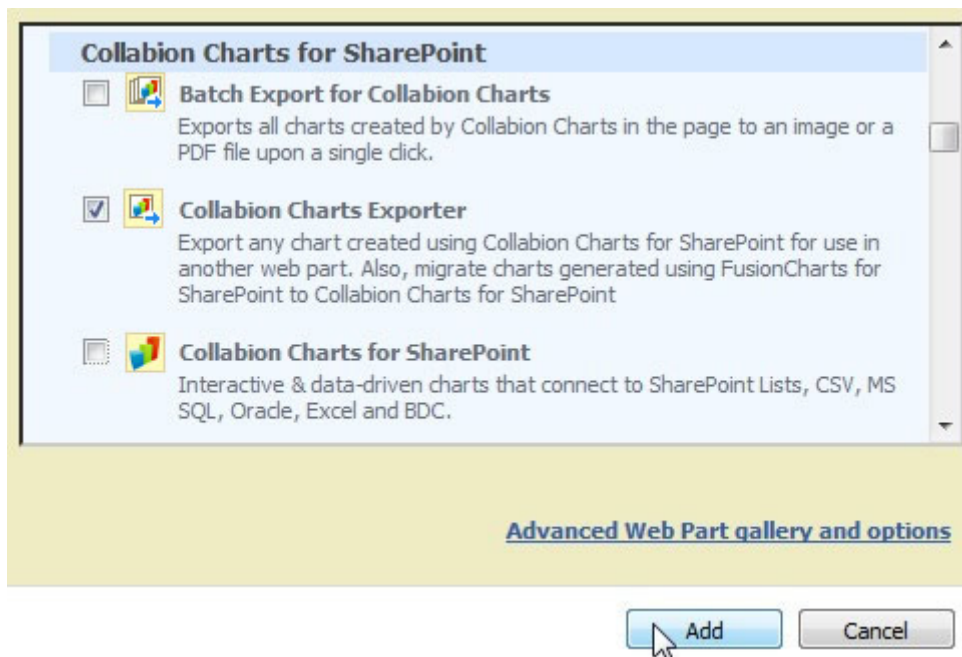2. Select **Edit Page** from **Site Actions** menu.
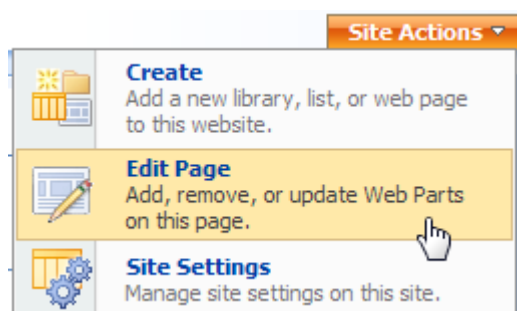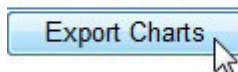
3. Click **Add a Web Part**

4. Select Collabion Charts Exporter check box under the Collabion Charts for SharePoint group.

5. Click **Add** button.

    A new Web Part with Export Charts button appears in the page.

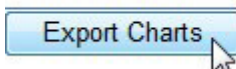This completes the process of Web Part.
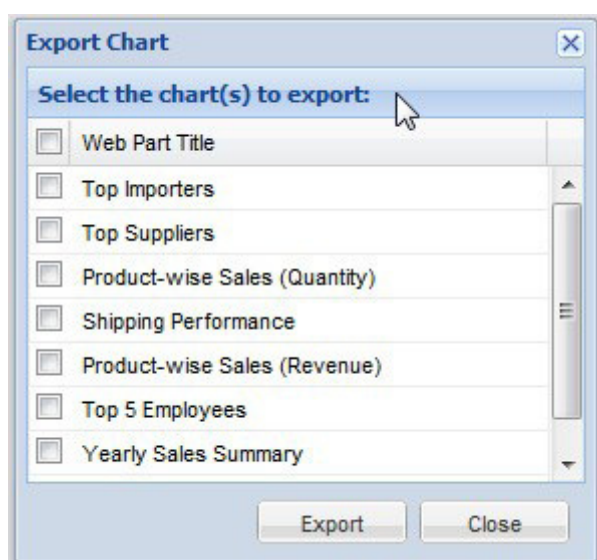
Export existing charts

To start exporting charts created using FusionCharts for SharePoint, do the following:

1.   Click Export Charts button that is displayed in the Collabion Charts Exporter Web Part.

Collabion Charts Exporter

> Export Charts

This opens up the Export Chart dialog box displaying all the charts (created using FusionCharts for SharePoint) present in the page. The Web Part title for each chart is shown in the list.

Export Chart   ✕

Select the chart(s) to export:

☐ Web Part Title

☐ Top Importers

☐ Top Suppliers

☐ Product-wise Sales (Quantity)

☐ Shipping Performance

☐ Product-wise Sales (Revenue)

☐ Top 5 Employees

☐ Yearly Sales Summary

                    Export   Close

2.   Select one or more chart(s) that you want to export from the list. You can
        select all the charts present in the list selecting the check box beside Web Part Title.

NOTE: If you had executed this export process earlier and initiated the export process again, you may find some of the charts pre-selected in the list. These charts were already exported by you earlier. In case you wish to export these charts again, you can retain the selection.

3.   Click Export button to export all the selected charts.

A confirmation message indicating the successful completion of the export process is displayed. Click Ok to close the message.

> NOTE: The exported charts are stored in a SharePoint List named CollabionCharts_Export-edCharts. Make sure you do not delete or modify this List. Deletion of modification of the List can disrupt the entire export process.

You can repeat the above steps to export the remaining charts.

This completes the export process of the charts present in a single web page. You need to open each individual web page (of all the sites) and export charts following the steps discussed above.

You can remove the charts from the web page once you have exported them. You can also **uninstall FusionCharts for SharePoint** once you are sure that you have exported all the required charts from all the sites and web pages.
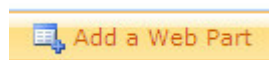
Import to Collabion Charts for SharePoint

Once the charts have been successfully exported, you need to import them individually into Collabion Charts for SharePoint. Follow the steps below:
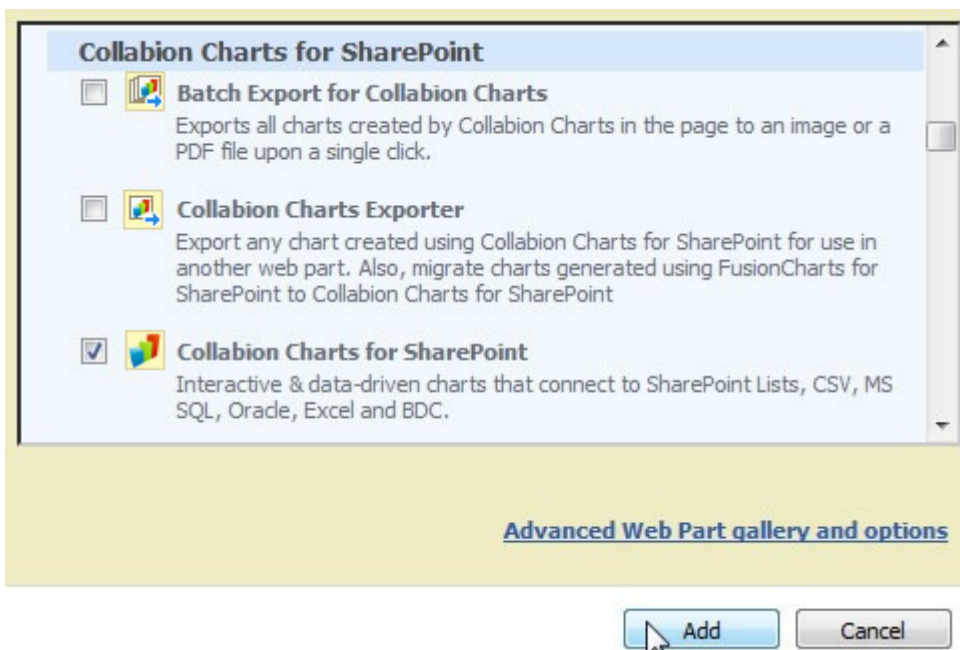
1. Create or open a **Web Part** page where you wish to import a chart.

2. Select **Edit Page** from **Site Actions** menu.
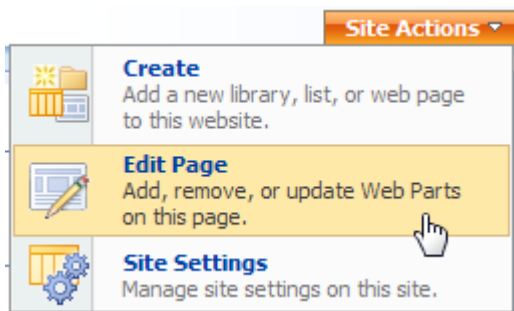
3. Click **Add a Web Part**

4. Select **Collabion Charts for SharePoint** check box.
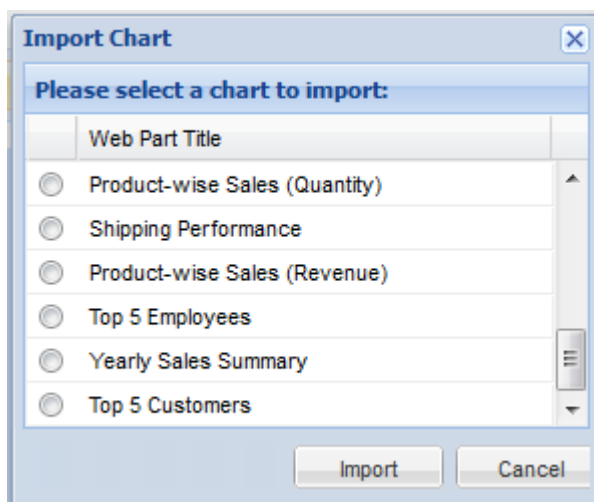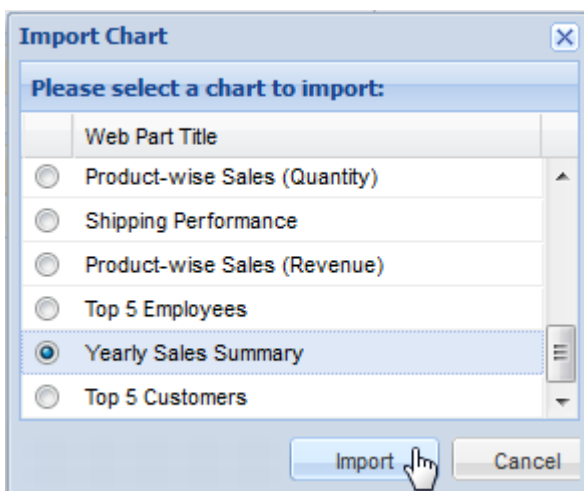

5. Click Add button.

6.   A new Web Part with title Collabion Charts for SharePoint appears in the page. Click on Import a chart.

      This opens up the Import Chart dialog box displaying the list of exported charts. The Web Part title for each chart is shown in the list.

7.   Select a chart that you want to import from the list and click the Import button.

      The selected chart gets imported to the Collabion Charts for SharePoint Web Part and is shown in the page

Repeat the above steps to import all the exported charts.

This completes the entire process of importing charts created using FusionCharts for SharePoint into Collabion Charts for SharePoint.

Uninstalling FusionCharts for SharePoint

To uninstall FusionCharts for SharePoint, run (as Administrator) the Setup file of FusionCharts for SharePoint. If you have lost the installation file, you can download it from our archive.

For SharePoint 2007 or WSS 3.0
http://www.fusioncharts.com/downloads/sharepoint/archives/FusionCharts-for-SharePoint-2007.zip

For SharePoint 2010
http://www.fusioncharts.com/downloads/sharepoint/archives/FusionCharts-for-SharePoint-2010.zip

Now do the following:

1. Copy the downloaded file to the PC in which SharePoint server and FusionCharts for SharePoint is installed
2. Extract the downloaded zip file in a folder
3. Run (as Administrator) the Setup (Setup.exe) file found in the extracted folder

Setup runs you through a wizard that helps you uninstall FusionCharts for SharePoint. Click Next button present in the Welcome Screen. A system check is performed to find existing installation of FusionCharts for SharePoint. Once the system check is complete, the wizard displays a confirmation message "FusionCharts for SharePoint is already installed". Click Next.
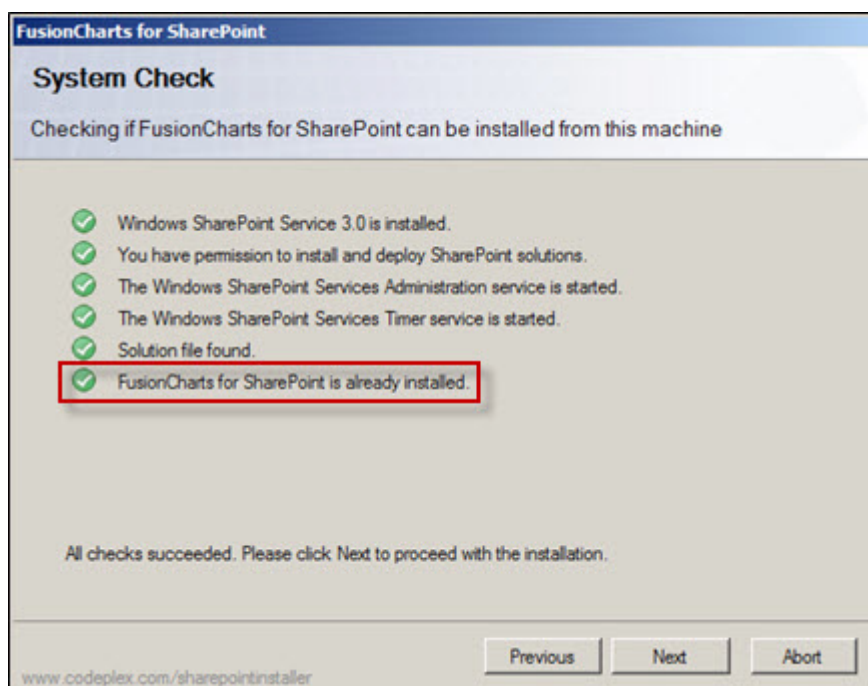
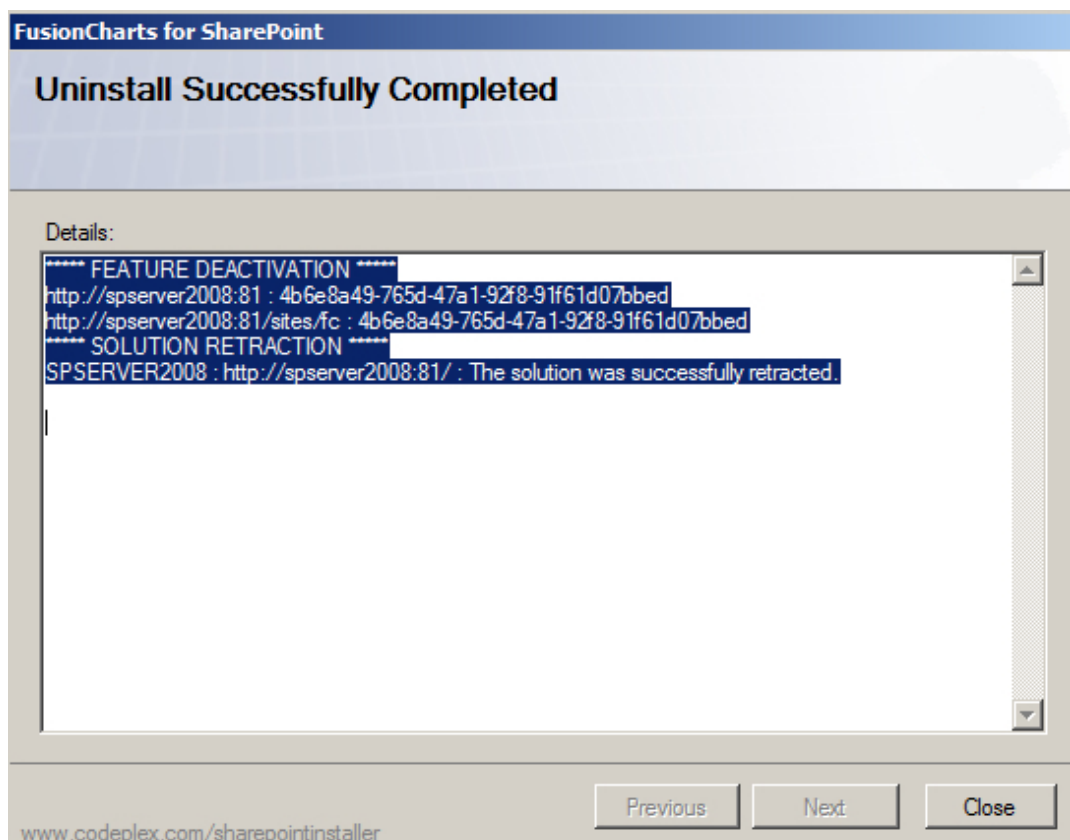The **Repair** or **Remove** screen appears as shown below:
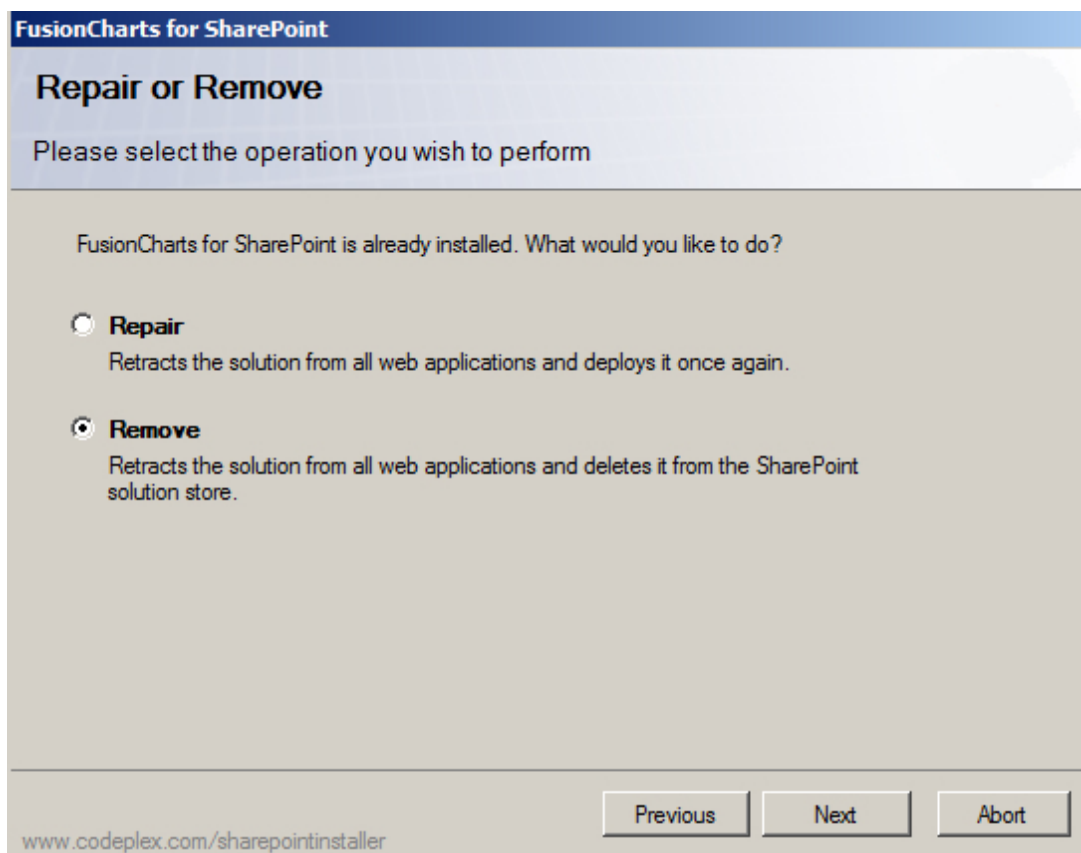
Select **Remove** and click **Next**. The uninstallation starts and is indicated by a progress bar. On successful uninstallation, "All operations successfully completed." message is displayed as shown below:
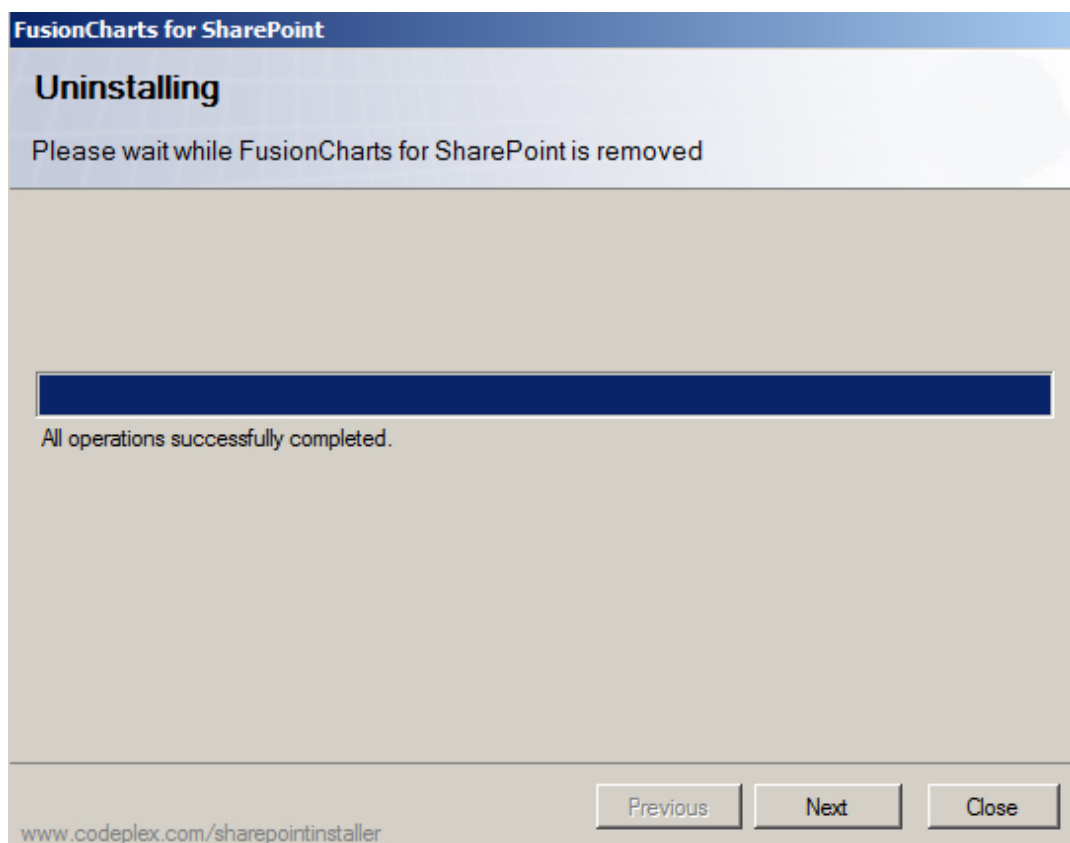
Click Next.

The Uninstall Successfully Completed screen appears and displays more details.

Click Close to exit the wizard.

About Collabion

Collabion from the house of FusionCharts is an exclusive product-line focused on the SharePoint platform. The first offering, Collabion Charts for SharePoint provides a quick and easy way to create insightful dashboards in SharePoint, without the need for MOSS or Excel Services and without any additional code. It works with WSS 3.0, MOSS 2007 and all editions of SharePoint Server 2010, including Foundation server.