



# **BoostSolutions Calendar Rollup App**

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## **User Guide**

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## 1. Introduction

SharePoint Calendar Rollup App allows you to aggregate calendar events from SharePoint Online calendars and Office 365 shared calendars, both Office 365 group calendars and personal calendars are supported.

By color-coding events based on different calendar sources, makes it easy to identify and categorize information, better to track your meetings and schedules.

Please note that Calendar Rollup App is only available in modern experience.

This document is used to instruct users how to use this app.

For the latest copy and other guides, please visit:

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

## 2. How to Use Calendar Rollup App

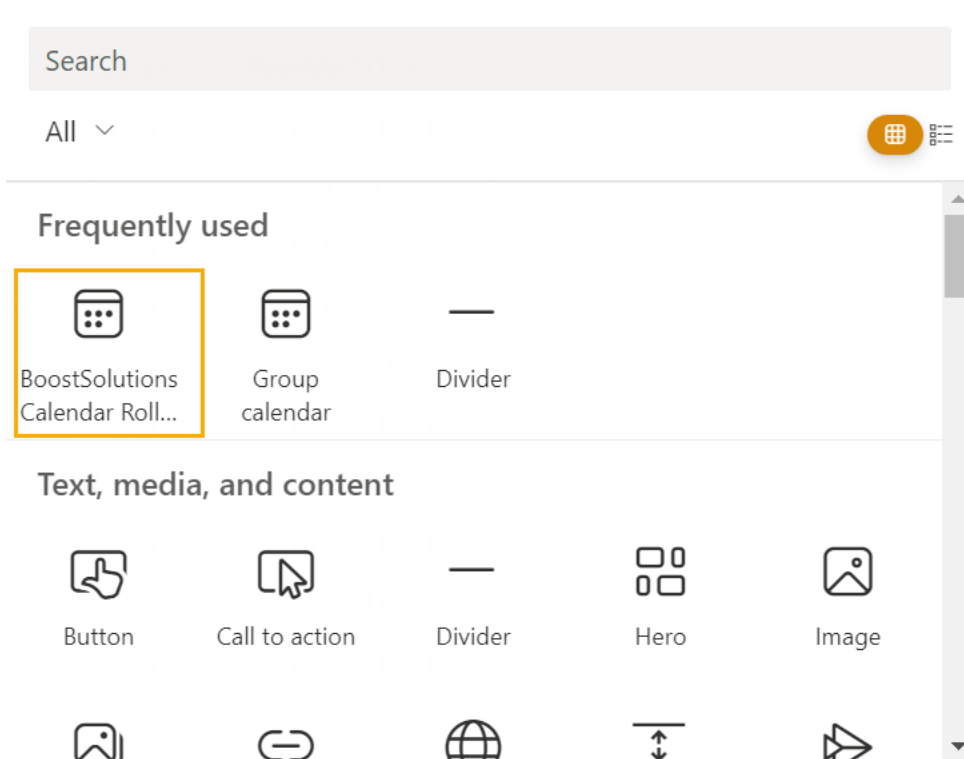
### 2.1 Add the Calendar Rollup Web Part

- Go to the page where you want to add the Calendar Rollup Web Part.
- If the page is not already in edit mode, click **Edit** at the top right of the page.
- Hover your mouse above or below an existing web part and you'll see a line with a circled **+**, like this:



- Click **+** and you'll see a list of web parts you can choose from. Click Calendar Rollup to add the web part.

If you do not find the web part, type **Calendar Rollup** in the **Search** box.



## 2.2 Configure Calendar Rollup Basic Settings

After adding a Calendar Rollup Web Part, you can configure the basic settings for Calendar Rollup Web Part now.

Click on the Calendar Rollup Web Part, and then click edit web part icon.



Then you will find Calendar Rollup panel on the right side.

Here you can configure the following settings:

**Default View:** Specify the default view, by month, week, day or agenda.

**Show calendar selector:** Select this option, it will show all added calendar sources added and allows users to choose which calendars will be displayed.

**Auto refresh calendars:** Select this option, it will automatically update calendar data according to a specified schedule (every 10 mins by default).

### BoostSolutions Calendar Rol... ✕

Configure the display and other default settings for your calendars.

#### Basic Settings

##### Default View

Show calendar selector

Auto refresh calendars

**Use default color:** Represent the calendar resource using the default color, usually the default color is the same as the site's theme.

To set a customized color for the calendar resource, turn off the "Use Default Color", and specify a color you preferred for text and background.

## Default Color Setting

### Use default color

Off

### Specify a color on all calendars

Text color



Background color



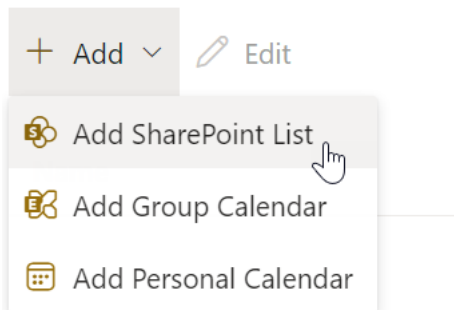
Preview

## 2.3 Add a SharePoint Calendar

- To add a SharePoint Calendar, click edit web part icon on the Calendar Rollup Web Part.



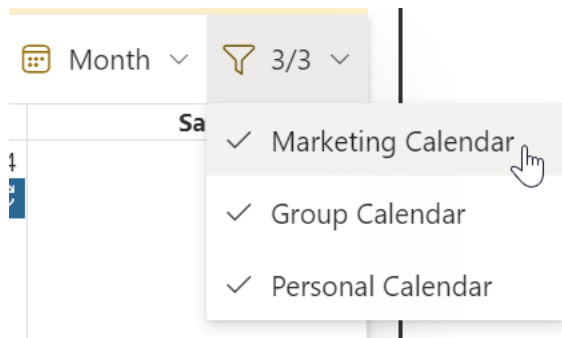
- On the right-side panel, click **Next** to go to the second page.
- Click on **Add**, then click **Add SharePoint List** from the drop-down list.



- On the pop-up dialog, specify a name for the incoming calendar. This name will be shown on the Calendar Rollup Web Part as follows:

Name \*

Marketing Meeting



- e. Specify if end users can modify calendar events. Selecting this option means that end users cannot create, update or delete events on the Calendar Rollup Web Part.

#### Read Only

No

- f. If you specify a color for the calendar source, the events of this calendar source will be displayed by the specified color. If you use the default color, the calendar will be displayed by the default color or the customized color you specified in Basic Settings section.

#### Use default color

#### Specify a color for this calendar

Text color

Background color

Preview

- g. Next, select a SharePoint Calendar. Calendar Rollup App enables you to add a calendar cross site within in the same site collection.

#### Source Site

Tutorial Website



#### Source List

Marketing Meeting



#### Source List View

Calendar



Source Site: Select the site to which the list or calendar belongs to.

Source List: Select a SharePoint list or calendar.



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Source List View: Select one view; the items in that view will be added on the Web Part.

Select columns to map calendar event: Map the list or calendar columns to the indicated fields.

- h. And then specify who can add, edit or delete event items on Calendar Rollup Web Part.

If you do not specify users, maintain the same permission settings with SharePoint.

Specify users who can add event

Specify users who can edit event

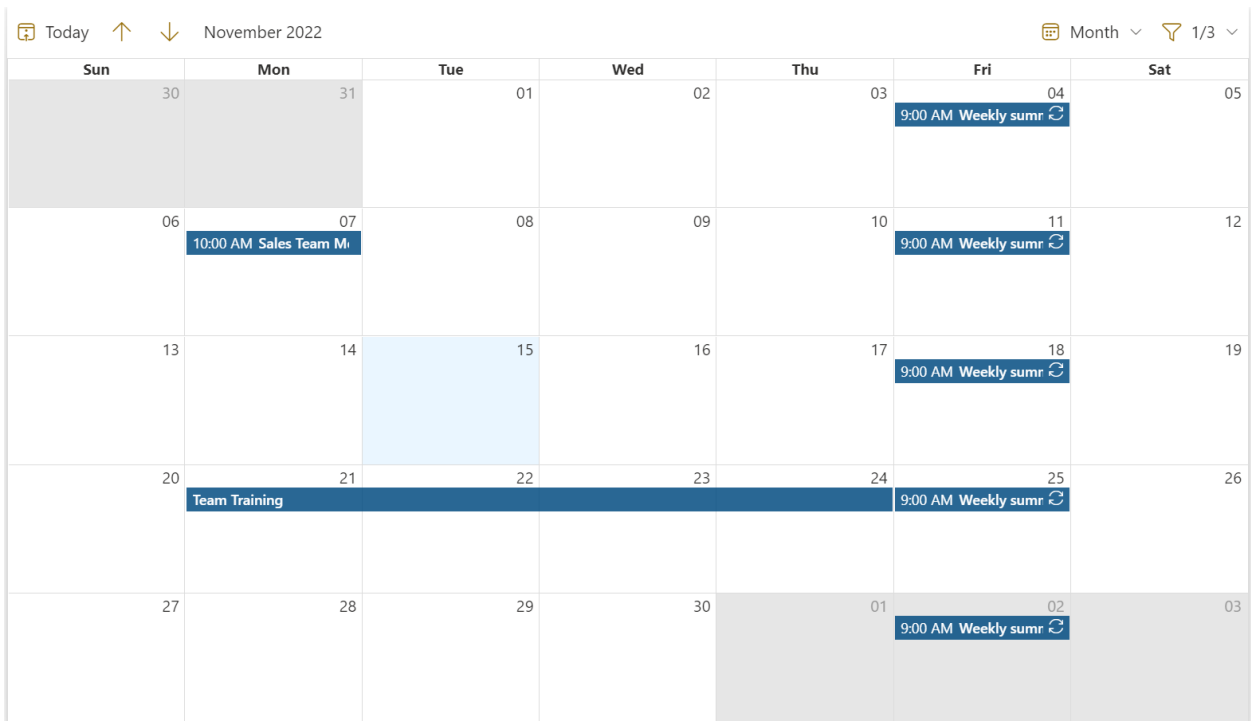
Specify users who can delete event

**Specify users who can add event:** only the specified users or SharePoint group members can add events.

**Specify users who can edit event:** only the specified users or SharePoint group members can edit events.

**Specify users who can delete event:** only the specified users or SharePoint group members can delete events.

- i. Click **OK** to save the settings.
- j. Then, the events of selected calendar will be showed on the web part as following.

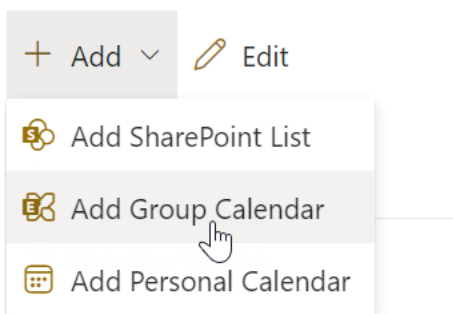


## 2.4 Add a Group Calendar

Calendar Rollup App enables you to aggregate events or meetings from shared group calendar. You can also schedule and manage the events.

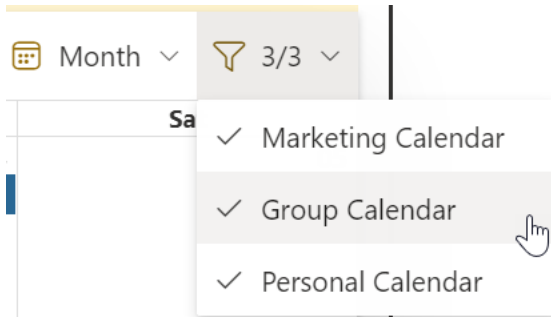
You can add multiple shared group calendars on one Calendar Rollup web part.

- a. To add a Group Calendar, click Add and then click Add Group Calendar from the drop-down list.



- b. On the pop-up dialog, specify a name for the incoming calendar. This name will be shown on the Calendar Rollup Web Part as follows:

Name \*



- c. Calendar Rollup App will list all available shared Group calendars, select a Group calendar from the drop-down list.

#### Team groups

- d. Specify if end users can modify calendar events. Selecting this option means that end users cannot create, update or delete events on the Calendar Rollup Web Part.

#### Read Only

 No

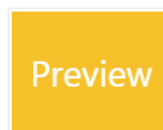
- e. Specify a color to represent the calendar resource. This color will override the default color or the customized color you specified in Basic Settings section.

#### Use default color

#### Specify a color for this calendar

Text color

Background color



- f. And then specify who can add, edit or delete event items on Calendar Rollup Web Part.  
If you do not specify users, it will maintain the same permission settings with SharePoint.

Specify users who can add event

Specify users who can edit event

Specify users who can delete event

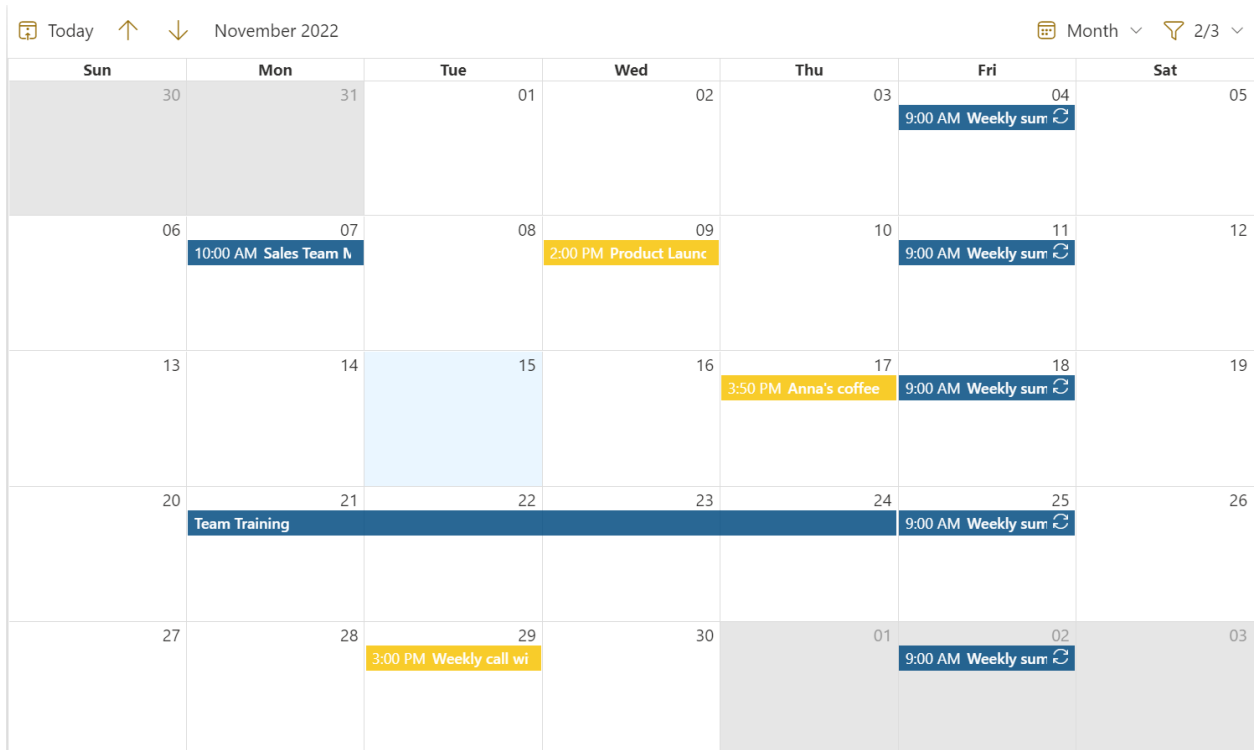
**Specify users who can add event:** only the specified users or SharePoint group members can add events.

**Specify users who can edit event:** only the specified users or SharePoint group members can edit events.

**Specify users who can delete event:** only the specified users or SharePoint group members can delete events.

g. Click **OK** to save the settings.

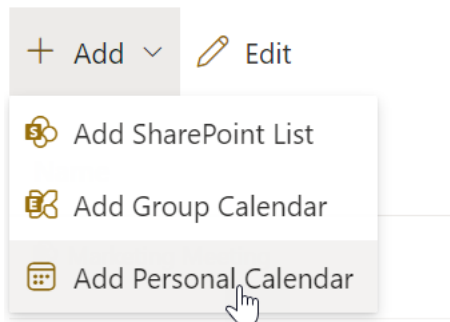
h. Then, the events of selected Group calendar will be showed on the web part as following.



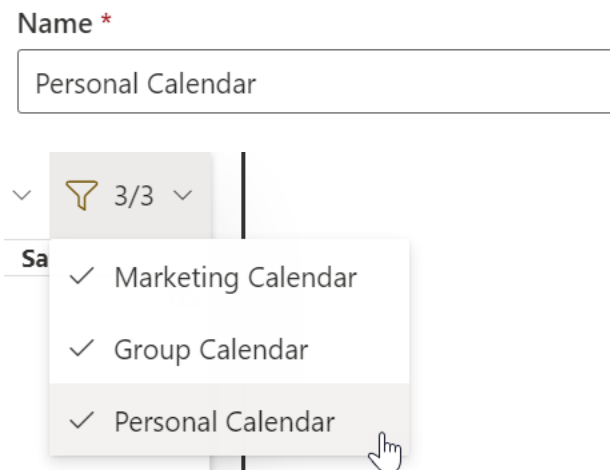
## 2.5 Add a Personal Calendar

You can only add personal calendar on the web part once. Calendar Rollup App will display events of personal calendar as per login user. For example, if the current login user is Danies, then all events of Danies' personal calendar will be displayed on the web part.

- a. To add a personal Calendar, click Add, and then click Add Personal Calendar from the drop-down list.



- b. On the pop-up dialog, specify a name for the incoming calendar. This name will be shown on the Calendar Rollup Web Part as follows:



- c. Specify if end users can modify calendar events. Selecting this option means that end users cannot create, update or delete events on the Calendar Rollup Web Part.

### Readonly

No

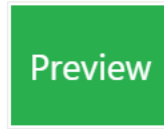
- d. Specify a color to represent the calendar resource. This color will override the default color or the customized color you specified in Basic Settings section.

Use default color



Specify a color for this calendar

Text color



Background color



- e. Click **OK** to save the settings.
- f. Then, the events of personal calendar will be displayed on the web part as following. The events will be different as per login user. For example, if the login user is Adele, the web part will display events of Adele’s calendar.



When you create a meeting on a group calendar, it appears to be organized by the group. You're automatically added as an attendee, and the event is added to your personal calendar at the same time.

## 2.6 Add/Edit/Delete Event

Users can create, edit and delete event in Month, Week, Day and Agenda view.

To add, edit or delete an event, you need to have permissions on the source calendar. Ensure that the calendar is not set as read only.

### Add an event

- Navigate to the Calendar Rollup web part.
- Double click on a date.
- An add an event dialog appears, select a Calendar Source, add details based on your needs like the title, Start and End time and a description and All-day event.

Marketing Calendar \*

Promotion review \* All day  No

🕒 Thu Nov 17 2022 📅 10 AM ▾ 00 ▾

Thu Nov 17 2022 📅 11 AM ▾ 00 ▾

☰

🔄 Repeat: Never ▾

Save Discard

The columns displayed in dialog may vary depending on the calendar source.

If shared group and personal calendar is selected, an attendee column will be displayed.

In attendee column, you can only type the user's name. SharePoint group is not supported currently.

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Group Calendar  \*

Team meeting  \* All day  No

Repeat:

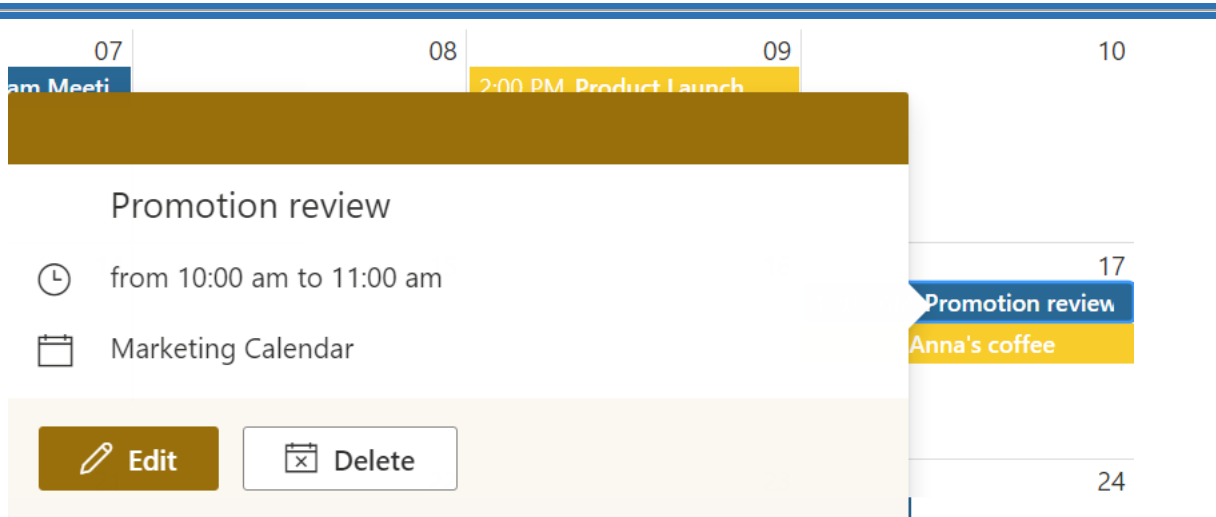
d. After entering the details for this new event, click Save.

### Edit an event

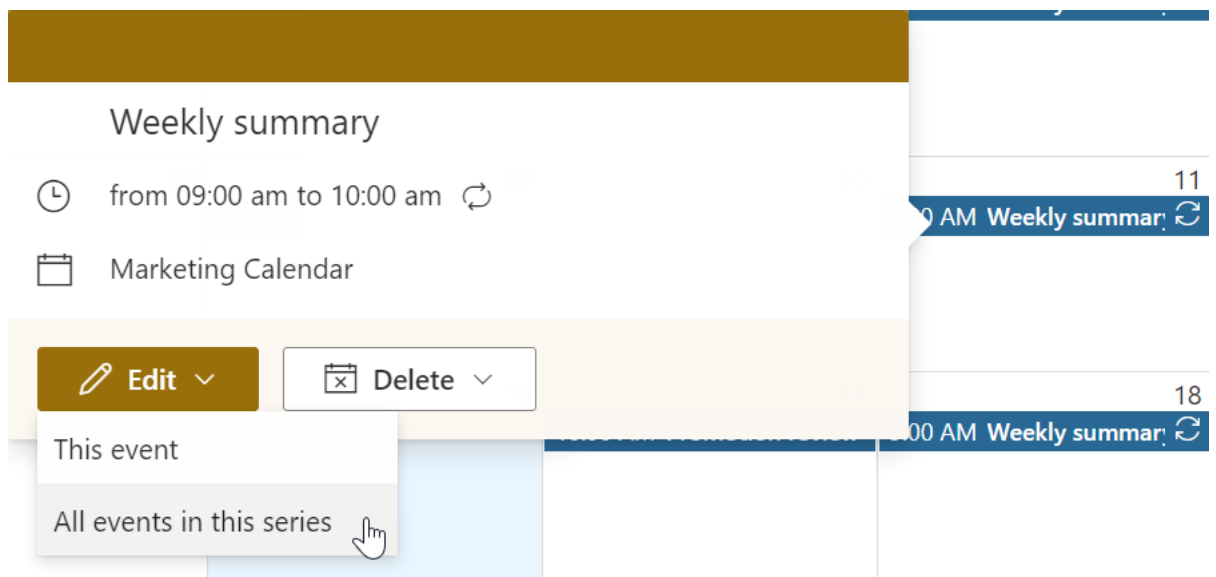
a. Navigate to the Calendar Rollup web part.

b. Select one event and click Edit Event in the tooltip.





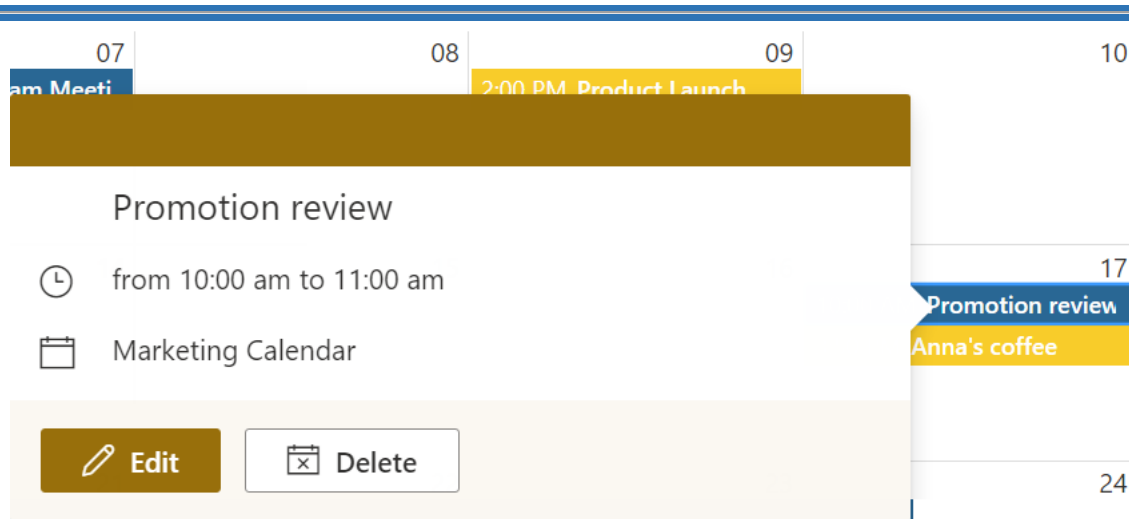
If the event is a series, you can choose whether to edit all events in this series.



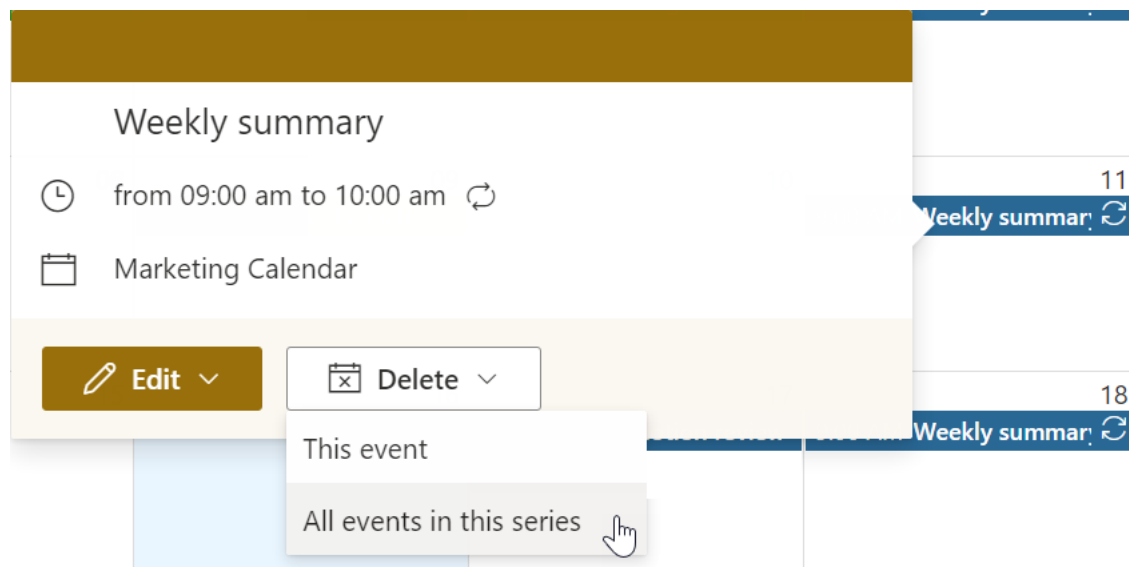
c. Edit details for this event and click Save.

**Delete an event**

- a. Navigate to the Calendar Rollup web part.
- b. Select one event and click Delete in the dialog.



If the event is a series, you can choose whether to delete all events in this series.



Please note that the event or all events in this series will be deleted from calendar source.

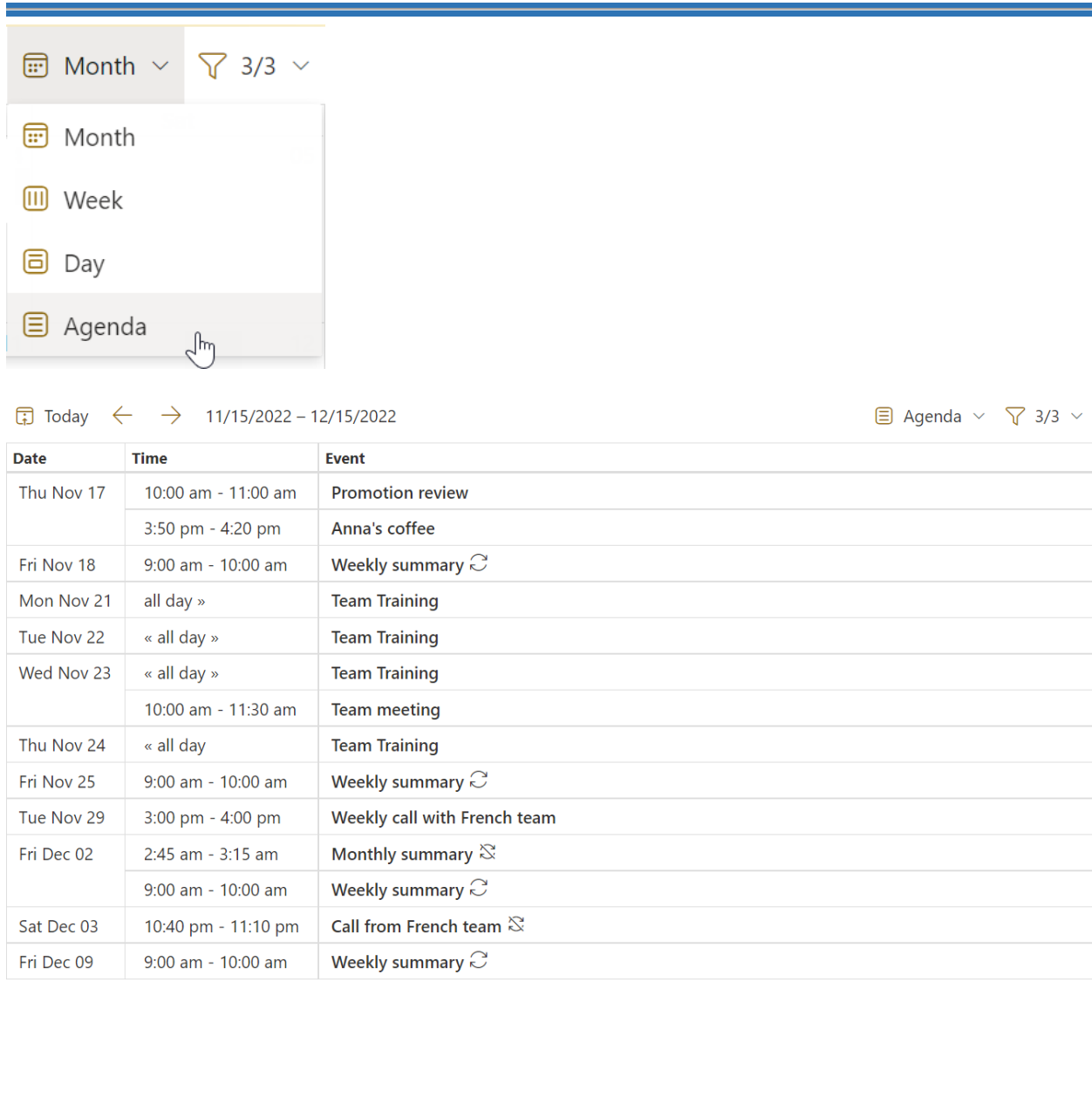
c. A warning message dialog will appear. Click OK to confirm.

## 2.7 Agenda View

The Agenda view displays a list of upcoming events in most recent 30 days, all events are grouped by day.

You can see the date and time of the event, along with a title.

To display the Agenda view, click the Agenda button on the top of the Web Part. In Agenda view, it displays date, time of event, along with a title.



In agenda view, you can update or delete events.

## 2.8 Select Calendar Source

Once a calendar is added to the Web Part, you can find it in the calendar selector as follows:

By selecting a calendar source, you can decide if the calendar events are shown on the Web Part.

A disabled calendar is not allowed to be selected in the calendar selector.

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Month  3/3

- ✓ Marketing Calendar
- ✓ Group Calendar
- ✓ Personal Calendar

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## Appendix 1: Subscription Management

You can use Calendar Rollup App trial subscription for a period of 30 days since the day you first use it.

If the trial subscription period ends, you will need to buy a subscription.

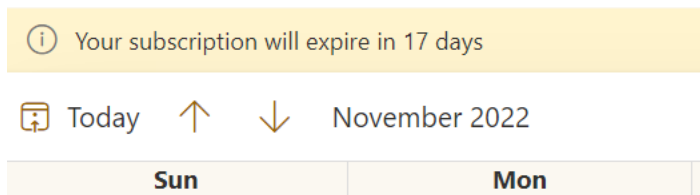
The subscription of Calendar Rollup App is per site (previously called "site collection") or tenant annually.

For site collection subscription, there are no end-user limitation. All users in site collection can access the app.

For tenant subscription, there are no sites or site collection limitation. All users can access the app in all sites or site collections within the same tenant.

### Checking Subscription Status

- After add a **Calendar Rollup Web part**, the subscription status will be shown on the top of the web part. When the subscription is about to expire within 30 days, the notification message will always show the days left.





- To update the subscription status, please click on the notification message, then the License Information dialog will show up.

## License Information







Your subscription will expire in 17 days

|                         |  |
|-------------------------|--|
| <b>Tenant ID:</b>       | ae586225-a936-4e32-b424-6a57e257cf0c   |
| <b>Site ID:</b>         | {41cb2e2d-ca83-4a15-ae69-0114c0132c8a}   |
| <b>Site Url:</b>        | https://bsmark.sharepoint.com/sites/Contso   |
| <b>Product:</b>         | BoostSolutions Calendar Rollup  |
| <b>License Type:</b>    | Site   |
| <b>Expiration Date:</b> | 12/16/2022                      |

Click the refresh icon next to the expiration date, the new status will be loaded.

- c. Once your subscription expired, there will be a message notify you.

 Your subscription has expired on 11/20/2022.

 Today   November 2022



|            |            |
|------------|------------|
| <b>Sun</b> | <b>Mon</b> |
|------------|------------|

- d. Please send us ([sales@boostsolutions.com](mailto:sales@boostsolutions.com)) the Site URL/Site ID/Tenant ID to proceed a subscription or renewal.
- e. If you purchase a site (site collection) subscription, the license status will be as following.
- The license type is Site.

## License Information



Your subscription will expire in 366 days



|                         |  |
|-------------------------|--|
| <b>Tenant ID:</b>       | ae586225-a936-4e32-b424-6a57e257cf0c   |
| <b>Site ID:</b>         | {41cb2e2d-ca83-4a15-ae69-0114c0132c8a}   |
| <b>Site Url:</b>        | https://bsmark.sharepoint.com/sites/Contso   |
| <b>Product:</b>         | BoostSolutions Calendar Rollup  |
| <b>License Type:</b>    | Site   |
| <b>Expiration Date:</b> | 11/30/2023                      |

- f. If you purchase a tenant subscription, the license status will be as this.  
The license type is Tenant.

## License Information



Your subscription will expire in 366 days

|                         |  |
|-------------------------|--|
| <b>Tenant ID:</b>       | ae586225-a936-4e32-b424-6a57e257cf0c   |
| <b>Site ID:</b>         | {41cb2e2d-ca83-4a15-ae69-0114c0132c8a}   |
| <b>Site Url:</b>        | https://bsmark.sharepoint.com/sites/Contso   |
| <b>Product:</b>         | BoostSolutions Calendar Rollup  |
| <b>License Type:</b>    | Tenant   |
| <b>Expiration Date:</b> | 11/30/2023                      |