BoostSolutions List Collection App

User Guide

Copyright

Our web site: https://www.boostsolutions.com

Content

1.   Introduction

SharePoint List Collection App enables you to collect items or documents from different SharePoint Online lists or document libraries in one place.

By creating different views, making it easier to organize and categorize the items or files on the web part.

Please note that List Collection App is available both in modern and classic 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 List Collection App
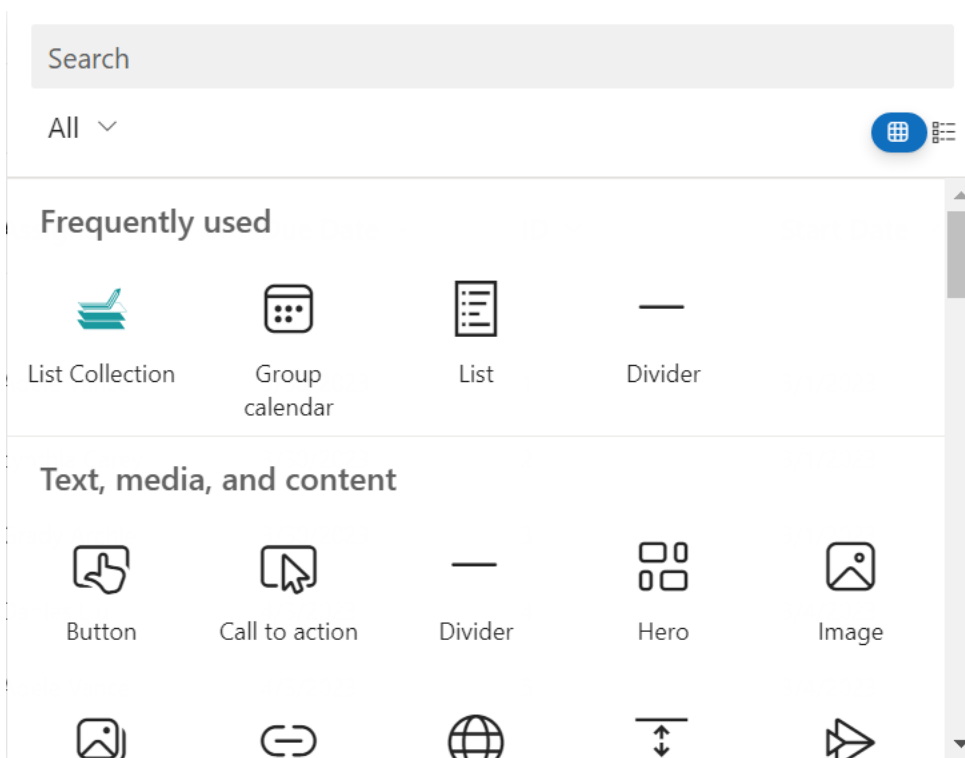
2.1   Add the List Collection Web Part

a. Go to the page where you want to add the List Collection Web Part.

b. If the page is not already in edit mode, click **Edit** at the top right of the page.

c. Hover your mouse above or below an existing web part or under the title region, and you'll see a line with a circled **+**, like this:

d. Click "**+**" and you'll see a list of web parts you can choose from. Click List Collection to add the web part.

   If you do not find the web part, type **List Collection** in the **Search** box.

2.2   Configure List Collection Settings

After adding a List Collection Web Part, you can configure the basic settings for List Collection Web Part now.

Click on the List Collection Web Part, and then click Settings > Collection Settings > General Settings.

In the **General Settings**, you can decide whether the Export to CSV feature is available on the web part.

General Settings

Export Settings

Allow users to export aggregated list data to a CSV file.
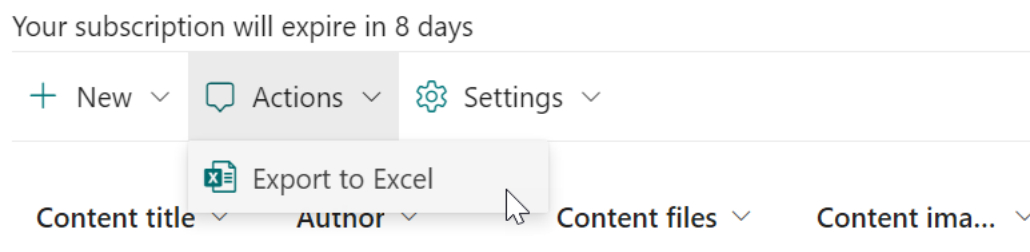
☑ Enable Export to CSV

Form Settings

Specify whether to launch the new, edit, and display forms in dialog. Selecting "New tab" will cause these actions to navigate to the full page. Note: Some functions are not supported in the list forms in classic experience.

How would you like to open list forms?

◉ In dialog

◯ New tab

Select the "Enable Export to CSV" option, the **Export to CSV** feature is available on the web part as shown below:

Your subscription will expire in 8 days

+ New ∨   💬 Actions ∨   ⚙ Settings ∨

🖹 Export to Excel

Content title ∨   Autnor ∨   Content files ∨   Content ima... ∨
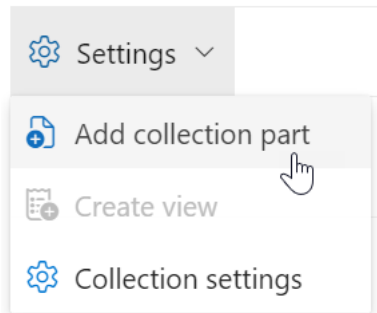
In the **Form Settings** section, specify how to open the list forms, select "In dialog", users create, view or edit item in a dialog; select "New tab", it will open a new tab to create, view or edit an item.

2.3   Add/Edit/Delete a Collection Part

The List Collection App allows you to collect multiple lists from different sites within one site collection. To add a Collection part, you must have at least a **Design** permission level.

Add a Collection Part

a. Click on the List Collection Web Part, and then click Settings > Add Collection Part.

b. In the **Add Collection Part** dialog, select the site, list, folder, and view.

If you select the "Include all sub folders" option, all contents of sub folders will be shown on the web part.

After selecting a list, you can filter columns in it by selecting a view. Once you select a view, the columns contained will be selected by default.

c. Map the columns and select which columns will be displayed on the web part; You can modify the column name and make it show on the List Collection Web Part.

Column Mapping

Select the columns you would like to display in the web part, and enter their new column names (if applicable).

	Column		Map to:	Mapped Column
☐	Title		Map to:	Title
☑	Event (linked to item with edit ...		Map to:	Event
☐	Color Tag		Map to:	Color Tag
☐	Compliance Asset Id		Map to:	Compliance Asset Id
☑	Start Time		Map to:	Start Time
☑	End Time		Map to:	End Time
☑	Category		Map to:	Category
☑	Attendees		Map to:	Attendees
☐	ID		Map to:	ID
☐	Content Type		Map to:	Content Type
☐	Modified		Map to:	Modified
☐	Title (linked to item)		Map to:	Title
☑	From List		Map to:	From List
☑	From Site		Map to:	From Site

d. And then click **OK.**

If you would like to add another collection part, repeat the step a to d.

After adding a new collection part, you need to edit the view to add this collection part in the view.

Edit a Collection Part

After adding a collection part, you can modify its settings, such as selecting another folder or more columns.

a. Click on the List Collection Web Part, and then click **Settings** > **Collection Settings**, and click on the Edit icon of the collection part you want to edit.

Parts

Collection Parts allow you to decide which items and columns to display in the List Collection Web Part. The collection parts currently configured in this web part are listed below:

From Site	From List	From Folder	Edit (click to edit)	Deletion (click to delete)
PA Team Site	PA Team Events	PA Team Events	✏ Edit...	🗑 Delete...
PD Team Site	PD Team Events	PD Team Events	✏ Edit...	🗑 Delete...

+ Add a collection part

b. And then you can modify the following: folder, view, and columns.

If unselect some columns, they will not be shown on the web part.

If you modify the column name, you may need to select the column in the view settings later.

c. And then click **OK**.

<u>Delete a Collection Part</u>

To delete a collection part, click on the List Collection Web Part, and then click Settings > Collection Settings, and click on the **Delete** to delete it.

Parts

Collection Parts allow you to decide which items and columns to display in the List Collection Web Part. The collection parts currently configured in this web part are listed below:

From Site	From List	From Folder	Edit (click to edit)	Deletion (click to delete)
PA Team Site	PA Team Events	PA Team Events	✏ Edit...	🗑 Delete...
PD Team Site	PD Team Events	PD Team Events	✏ Edit...	🗑 Delete...

+ Add a collection part

Click **OK** to confirm, then the contents of list or library will be deleted from the web part.
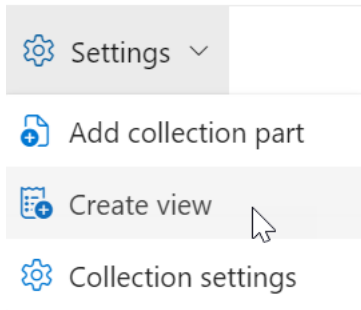
Are you sure you want to delete this collection part?

OK	Cancel

2.4　Create/Modify/Delete a View

On the List Collection Web Part, you can create a view to organize and display the contents of list or library.

Create a View

a. Click on the List Collection Web Part, and then click Settings > Create view.

b. In the Create View dialog, give a meaningful name for this view. Select the **Make this the default view** option if you want to set it as the default view for the List Collection Web Part. Only public view can be the default view for the web part.

c. In the **Audience** section, under **View Audience**, select **Create a Personal View** or **Create a Public View** based on your needs. By default, **Create a Public View** is selected.

d. In the **Filter** section, select lists and list views to filter items on the web part. After you select a view, all items contained will be shown on the web part.

e.   In the **Columns** section, select or clear the columns that you want or do not want in the view. From
     the drop-down lists next to the selected columns, specify the order of the columns in the view.

Columns

	Column Name	Position from Left
Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the Position from the box on the left.	☑ Event	1 ⌄
	☑ Attendees	2 ⌄
	☑ Category	3 ⌄
	☑ End Time	4 ⌄
	☑ From List	6 ⌄
	☑ From Site	7 ⌄
	☑ Start Time	5 ⌄

f.   In the **Edit Menu** section, select a desired column from the drop-down list and the Edit Menu will be
     linked to this column. You can then edit items in the List Collection Web Part.

Edit Menu

Add edit menu to a column, by which you can
edit the items just like what you do in list.

Link to:

Event	⌄

For example, if you select "Event" in the drop-down list, the Edit menu will be linked to Event. You can
edit items in the List Collection Web Part the same way as you do in the list.

g.   In the **Sort** section, set the display of items in the view.

Sort

Select a column to determine the order in which
the items in the view are displayed.

Sort by the column:

None	⌄

◉ Show items in ascending order
    (A, B, C, or 1, 2, 3)

◯ Show items in descending order
    (C, B, A, or 3, 2, 1)

h.   In the **Group By** section, select a column to group items on the web part.

For example, group the items in a task list by Status.

Group By

Select a column to determine how to group the items in this list collection. This will group together all items with matching values in the column you specify.

Group by the column:

| Category ⌄ |

◉ Show items in ascending order
(A, B, C, or 1, 2, 3)

◯ Show items in descending order
(C, B, A, or 3, 2, 1)

By default, show groupings:

◯ Collapsed

◉ Expanded

i.   In the **Totals** section, select the column which you want to display summary calculations in the view, such as count, average, maximum, minimum.

Totals

Select one or more totals to display.

| Column Name	Total
Category	None ⌄
End Time	None ⌄
From List	None ⌄
From Site	None ⌄
Start Time	None ⌄

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

k.   Then, the items of selected list will be shown on the web part as follows.

	Event ∨		Attendees ∨	Category ⊑ ∨	End Time ∨	Start Time ∨	From List ∨	From Site ∨
∨	**Category: Business (1)**							
	Marketing Research	•••	Marketing Members	Business	4/6/2023 11:00 AM	4/6/2023 9:00 AM	PA Team Events	PA Team Site
∨	**Category: Company Event (4)**							
	Friday conference	•••	All members	Company Event	4/14/2023 4:00 PM	4/14/2023 2:00 PM	PA Team Events	PA Team Site
	Get-together	•••	All Company Mem...	Company Event	4/14/2023 5:00 PM	4/14/2023 2:00 PM	PA Team Events	PA Team Site
	Teambuilding	•••	All members	Company Event	4/14/2023 5:00 PM	4/14/2023 3:00 PM	PD Team Events	PD Team Site
	Get-together	•••	All Company Mem...	Company Event	4/24/2023 5:00 PM	4/24/2023 2:00 PM	PD Team Events	PD Team Site
∨	**Category: Meeting (6)**							
	PA team discussion	•••	PA team	Meeting	4/4/2023 11:00 AM	4/4/2023 10:00 AM	PA Team Events	PA Team Site
	Product Plan	•••	PA team	Meeting	4/5/2023 4:00 PM	4/5/2023 2:00 PM	PA Team Events	PA Team Site
	UI review	•••	PA team	Meeting	4/10/2023 11:00 AM	4/10/2023 10:00 AM	PA Team Events	PA Team Site
	Month Review	•••	PD team	Meeting	4/5/2023 4:00 PM	4/5/2023 2:00 PM	PD Team Events	PD Team Site
	Kick off	•••	PD team	Meeting	4/6/2023 11:00 AM	4/6/2023 10:00 AM	PD Team Events	PD Team Site
	Show All							
∨	**Category: Work Hours (2)**							

Modify a View

You can make some changes in the view, such as, change the order of items, group them, add columns and change other column settings.

a. Select the name of the view that you want to change and click **Edit current view**. If this option is not visible, you may not have the required permission.
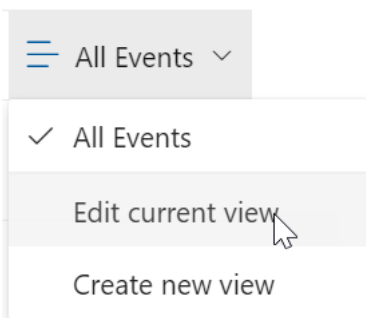
b. Make the changes and click OK.

Delete a View

To delete a view on the web part, click on the List Collection Web Part, and then click Settings > Collection Settings, and click on **Delete** for the view.

Views

A List Collection Web Part view allows you to see a particular selection of items or to see the items sorted in a particular order. The vie

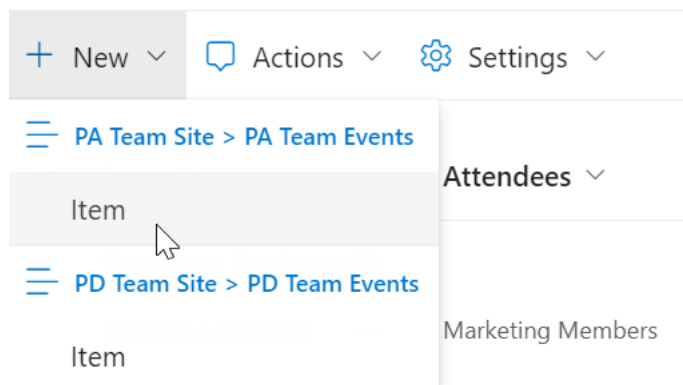| View (click to edit)	Default View	Deletion (click to delete)
All Events	✓	Cannot delete the default view
Active Events		🗑 Delete…
+ Add a view		

Click **OK** to confirm, then the view will be deleted from the web part.

2.5   Manage an Item on Web Part

List Collection App allows you to add, edit and delete items for different lists. The original lists will be auto-updated accordingly.

a.   In the New drop-down menu, you can choose which list to add an item to.
     If there are multiple content types in the list, you can choose one from the drop-down menu.

     For example, you can add an item to the PA Team Events list on the PA Team site.

+ New ∨	💬 Actions ∨	⚙ Settings ∨

≡ PA Team Site > PA Team Events

   Item
                                        Attendees ∨

≡ PD Team Site > PD Team Events

                                        Marketing Members
   Item

b.   On the pop-up dialog, fill in the necessary information. The new item will be shown on the List Collection Web Part and added to the source list.

     To view, edit or delete an item, click the context menu of the target item. Any changes made of and item will be updated to the source item.
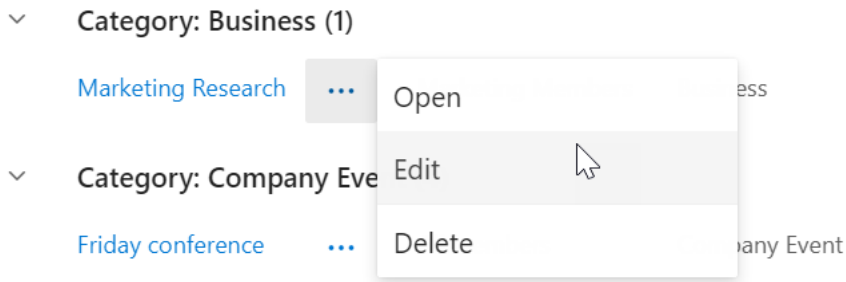
2.6   Export to Excel

List Collection App allows you to export collected data to a CSV file. This is a convenient way to view data and save time, as opposed to going into each list and exporting list items separately.

a.   Select the view you want to export.

b.   Click Export to CSV on the Actions menu.
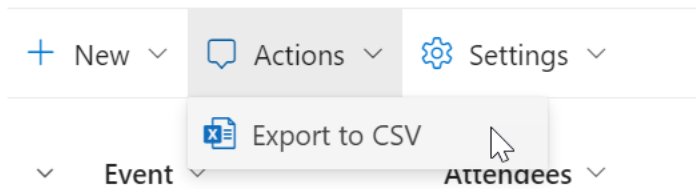
Appendix 1: Subscription Management

You can use List Collection 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 List Collection App is per site (previously called "site collection") or tenant annually.

For site collection subscription, there are no end-user limitations. 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

a. After adding a **List Collection 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.

b. 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 16 days

Tenant ID:	ae586225-a936-4e32-b424-6a57e257cf0c
Site ID:	{6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}
Site Url:	https://bsmark.sharepoint.com/sites/TutorialWeb...
Product:	List Collection 1.0.5.516
License Type:	Trial
Expiration Date:	6/1/2023

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 5/5/2023

+ New ∨   💬 Actions ∨   ⚙ Settings ∨

d. Please send us (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 follows.

The license type is Site.

License Information

×

Your subscription will expire in 365 days

Tenant ID:	ae586225-a936-4e32-b424-6a57e257cf0c
Site ID:	{6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}
Site Url:	https://bsmark.sharepoint.com/sites/TutorialWeb...
Product:	List Collection 1.0.5.516
License Type:	Site
Expiration Date:	5/15/2024

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 372 days

Tenant ID:	ae586225-a936-4e32-b424-6a57e257cf0c
Site ID:	{6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}
Site Url:	https://bsmark.sharepoint.com/sites/TutorialWeb...
Product:	List Collection 1.0.5.516
License Type:	Tenant
Expiration Date:	5/22/2024