



List Collection 3.0

User Guide

Copyright

Copyright ©2008-2019 BoostSolutions Co., Ltd. All rights reserved.

All materials contained in this publication are protected by Copyright and no part of this publication may be reproduced, modified, displayed, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior written consent of BoostSolutions.

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

Content

1.	Introduction	1
2.	Installation	2
2.1	Product Files	2
2.2	Software Requirements	3
2.3	Installation	4
2.4	Upgrade.....	6
2.5	Uninstallation	6
2.6	Command_Line Installation	6
2.7	Feature Activation	10
3.	About List Collection Web Part	11
4.	Configuring the List Collection Web Part.....	15
4.1	Add a List Collection Web Part	15
4.2	Add a Collection Part	15
4.3	Create View for the List Collection Web Part	17
4.3.1	Create a Standard View	17
4.3.2	Create a Calendar View	23
4.3.3	Create a Gantt View	27
4.4	Column Header Filter	30
4.5	Manage Items on Web Part.....	31
5.	Export to Excel.....	33
6.	Connect to Filter Web Parts.....	34
6.1	Connect to a Choice Filter Web Part.....	34
6.2	Connect to a Text Filter Web Part	37
7.	Troubleshooting & Support	40
	Appendix 1: License Management	41

1. Introduction

SharePoint List Collection is a Web Part that collects lists from different sites to be displayed on a standard, calendar or Gantt view.

This user guide is used to instruct users how to configure and use SharePoint List Collection.

For the latest copy of this and other 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 List Collection 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.
List Collection_V3_User Guide.pdf	User guide for List Collection 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.
Library\6.0\Setup.exe	The product installer for .Net Framework 4.6.
Library\6.0\Setup.exe.config	A file containing the configuration information for the installer.
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\ BoostSolutions.FoundationSetup16.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2016/2019.
Solutions\ListCollection\ BoostSolutions.ListCollectionSetup14.3.wsp	A SharePoint solution package containing List Collection files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\ListCollection\ BoostSolutions.ListCollectionSetup15.3.wsp	A SharePoint solution package containing List Collection files and resources for SharePoint 2013 or

	SharePoint Foundation 2013.
Solutions\ListCollection\ BoostSolutions.ListCollectionSetup16.3.wsp	A SharePoint solution package containing List Collection files and resources for SharePoint 2016/2019.
Solutions\ListCollection\Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

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

SharePoint 2019

Operating System	Windows Server 2016 Standard or Datacenter Windows Server 2019 Standard or Datacenter
Server	Microsoft SharePoint Server 2019
Browser	Microsoft Internet Explorer 11 or above Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2016

Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2016 Standard or Datacenter
Server	Microsoft SharePoint Server 2016 Microsoft .NET Framework 4.6
Browser	Microsoft Internet Explorer 10 or above Microsoft Edge Mozilla Firefox Google Chrome

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 8 or above Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2010

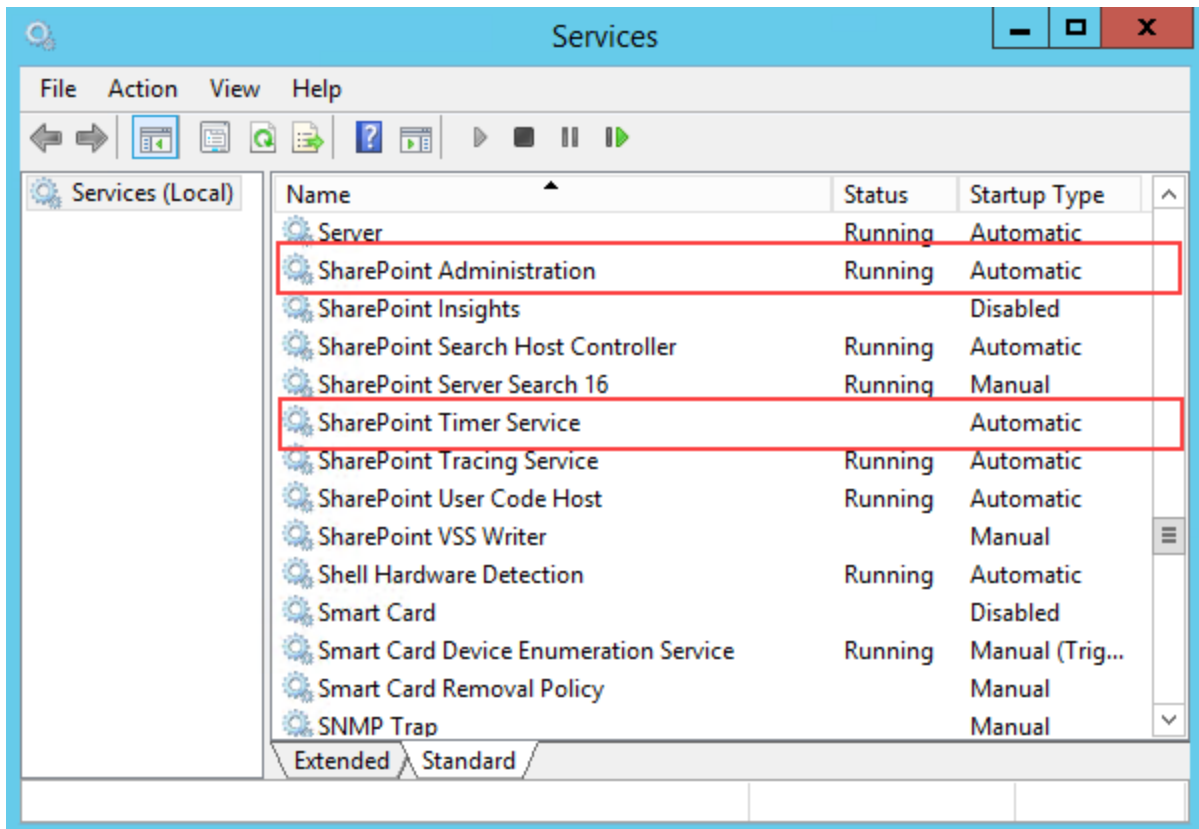
Operating System	Microsoft Windows Server 2008 x64 Microsoft Windows Server 2008 R2
Server	Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010 Microsoft .NET Framework 3.5
Browser	Microsoft Internet Explorer 7 or above Mozilla Firefox Google Chrome

2.3 Installation

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

Installation Preconditions

Before you begin installing List Collection, please make sure these services are started on your SharePoint servers: **SharePoint Administration** and **SharePoint Timer Service**.



List Collection 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 List Collection 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 your product has been installed to. Click **Close**.

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 List Collection in SharePoint 2016 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 List Collection to SharePoint servers

- 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 2016**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\16\BIN

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

```
stsadm -o addsolution -filename BoostSolutions.ListCollectionSetup16.3.wsp
stsadm -o addsolution -filename BoostSolutions.FoundationSetup16.1.wsp
```

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

```
stsadm -o deploysolution -name BoostSolutions.ListCollectionSetup16.3.wsp -
allowgacdeployment -url [virtual server url] -immediate
stsadm -o deploysolution -name BoostSolutions.FoundationSetup16.1.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.ListCollectionSetup16.3.wsp
stsadm -o displaysolution -name BoostSolutions.FoundationSetup16.1.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 Brandysoft.SharePoint.ListCollection -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.

- On the Central Administration Home page, click **System Settings**.
- In the Farm Management section, click **Manage farm solutions**.
- On the Solution Management page, check whether the solution "BoostSolutions.ListCollectionSetup16.3.wsp" is deployed to the web applications.
- 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**.

Remove List Collection from SharePoint servers

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.ListCollectionSetup16.3.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.ListCollectionSetup16.3.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.ListCollectionSetup16.3.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.ListCollectionSetup16.3.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.ListCollectionSetup16.3.wsp.
- i. Select "BoostSolutions.ListCollectionSetup16.3.wsp".
- j. On the Solution Properties page, click **Remove Solution**.

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.FoundationSetup16.1.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.FoundationSetup16.1.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.FoundationSetup16.1.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.foundationsetup16.1.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.foundationsetup16.1.wsp.
- i. Select "boostsolutions.foundationsetup16.1.wsp".
- j. On the Solution Properties page, click **Remove Solution**.

2.7 Feature Activation

Activate features in site collection

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

- a. Click **Settings**  and then 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 List Collection 3.8.1011.0

Collect and display list items from different sites in a site collection. (Powered by BoostSolutions)

Deactivate

Active

3. About List Collection Web Part

List Collection web part gives you an easy way to collect multiple lists. You can create different views in the web part.

Standard View

BoostSolutions List Collection Web Part

New ▾ Actions ▾ Settings ▾ View: [Standard View](#)

Task Name	Priority	Task Status	Manager	Start Date	Due Date ↑	From Site	From List
ARB plan	High	Completed	Claus Kong	8/1/2017	8/20/2017	BoostSolutions	PD Project
ARB evaluation	High	Completed	Dexter Morgen	8/21/2017	8/31/2017	BoostSolutions	PD Project
ARB analysis	High	Completed	Elmer Tompkins	9/2/2017	9/25/2017	BoostSolutions	PD Project
ARB develop	Normal	In Progress	Goldie Almond	9/27/2017	11/27/2017	BoostSolutions	PD Project
ARB test	Normal	In Progress	Glenda Phillips	10/27/2017	11/27/2017	BoostSolutions	PD Project
ARB demo	Low	Not Started	Bruce lee	11/28/2017	11/30/2017	BoostSolutions	PD Project
ARB release	Low	Not Started	Brandy Walker	12/1/2017	12/5/2017	BoostSolutions	PD Project

Calendar View

BoostSolutions List Collection Web Part

New Actions Settings

View: Calendar View

November 2017

Expand All Collapse All | 1 Day 7 Week 31 Month

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
29	30	31	1	2	3	4
ARB develop						
PT develop						
ARB test						
5	6	7	8	9	10	11
ARB develop						
PT develop						
ARB test						
					▼ 1 more item	▼ 1 more item
12	13	14	15	16	17	18
ARB develop						
PT develop						
ARB test						
▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item
19	20	21	22	23	24	25
ARB develop						
PT develop						
ARB test						
▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item
26	27	28	29	30	1	2
ARB develop		ARB demo			ARB release	
PT develop						
ARB test						
▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item

Gantt View

BoostSolutions List Collection Web Part

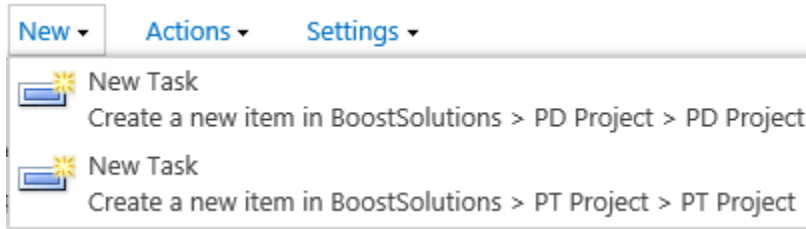
New Actions Settings

View: Gantt View

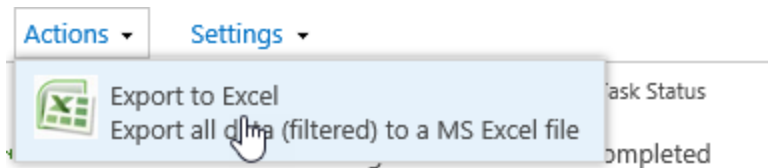


There are 4 drop-down menus on the web part:

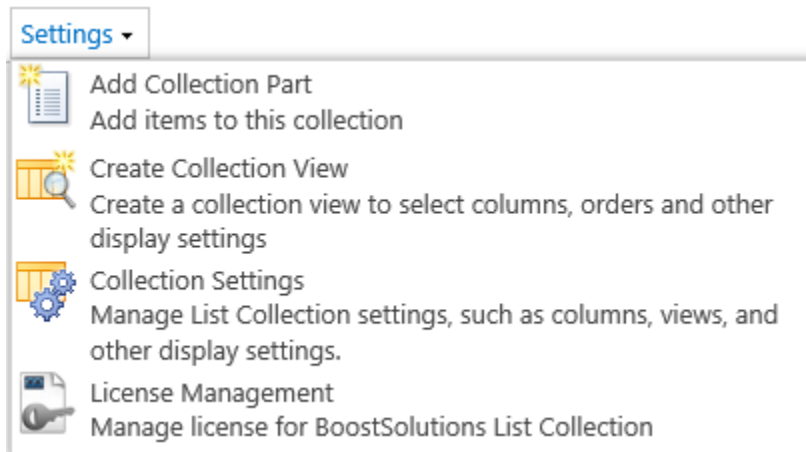
New: Add new items to different lists right on the web part. For more information, please see [Add new Items](#).



Actions: Export data on the web part to a MS Excel file. For more information, please see [Export to Excel](#).

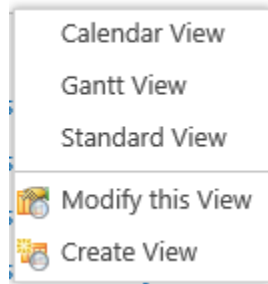


Settings: Entries for Add Collection Part, Create Collection View, Collection Settings and License Management. For more information, please see [Add a Collection Part](#) [Create View for List Collection Web Part](#) [License Management](#)



Views: Use these commands to switch, modify and create views.


View: [Standard View](#)

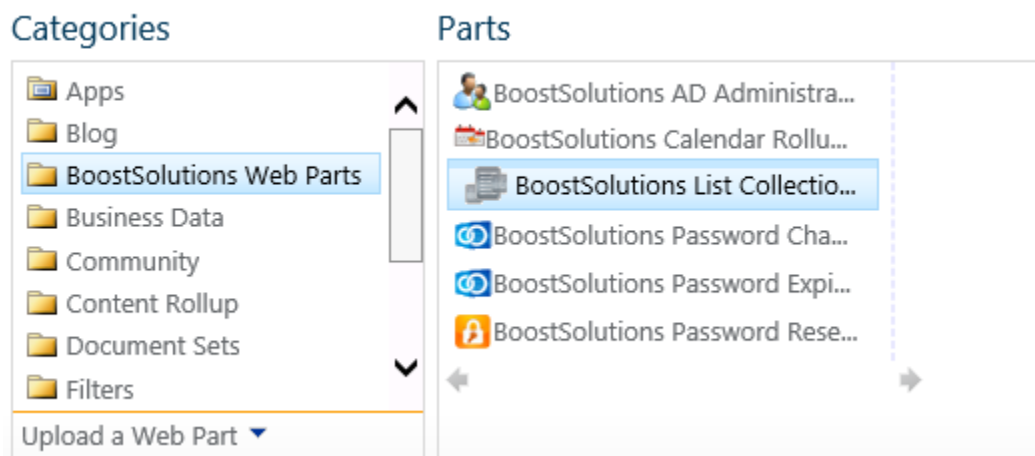


4. Configuring the List Collection Web Part

4.1 Add a List Collection Web Part

To add a List Collection Web Part, you must have at least Design permission level.

- From any page, click **Settings**  and then click **Edit Page** to modify the page.
- On the ribbon, click the **Insert** tab, and then click **Web Part**.
- Under Categories, select the **BoostSolutions Web Parts** category. Next select the **BoostSolutions List Collection Web Part** under the Web Parts section and click **Add**.

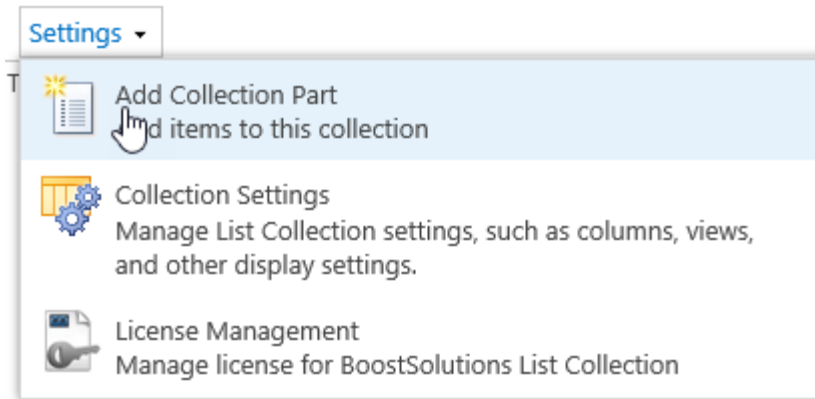


- Click **Save** to save the page. The List Collection web part will be added to the page.

4.2 Add a Collection Part

List Collection allows you to collect multiple lists from different sites. To add a Collection part, you must have at least Design permission level.

- On the **Settings** menu, click **Add Collection Part**.



- b. On the **Add Collection Part** page, select the site, list and view.

Collect Information From Site

Please select a site, list and view to collect items to display in the list collection.

Select site:	BoostSolutions	▾
Select list:	PD Project	▾
Select folder:	PD Project	▾ <input checked="" type="checkbox"/> Include all sub folders
Select view:	All tasks	▾

- c. Map the columns and select which columns to display on the web part; then click **OK**.

Column Mapping

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

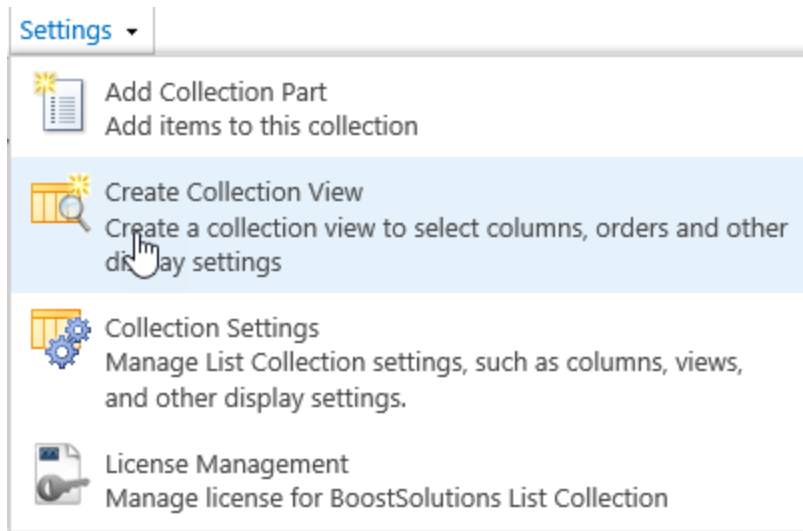
<input type="checkbox"/> ID	Map to:	ID
<input type="checkbox"/> Content Type	Map to:	Content Type
<input checked="" type="checkbox"/> Task Name	Map to:	Task Name
<input type="checkbox"/> Modified	Map to:	Modified
<input type="checkbox"/> Created	Map to:	Created
<input type="checkbox"/> Created By	Map to:	Created By
<input type="checkbox"/> Modified By	Map to:	Modified By
<input type="checkbox"/> Version	Map to:	Version
<input type="checkbox"/> Attachments	Map to:	Attachments
<input checked="" type="checkbox"/> Priority	Map to:	Priority
<input checked="" type="checkbox"/> Task Status	Map to:	Task Status
<input checked="" type="checkbox"/> % Complete	Map to:	% Complete
<input checked="" type="checkbox"/> Assigned To	Map to:	Assigned To
<input type="checkbox"/> Description	Map to:	Description
<input checked="" type="checkbox"/> Start Date	Map to:	Start Date
<input checked="" type="checkbox"/> Due Date	Map to:	Due Date
<input type="checkbox"/> Completed	Map to:	Completed
<input type="checkbox"/> Related Items	Map to:	Related Items
<input checked="" type="checkbox"/> From Site	Map to:	From Site
<input checked="" type="checkbox"/> From List	Map to:	From List

4.3 Create View for the List Collection Web Part

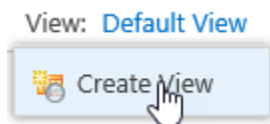
You can create views on the List Collection web part. There are three views: Standard View, Calendar View and Gantt View.

4.3.1 Create a Standard View

- a. On the **Settings** menu, click **Create Collection View**.




Or, on the View menu, click **Create View**.





- b. In the **Choose a view format** section, select **Standard View**.

Create View ⓘ

Choose a view format

 **Standard View**
View data on a Web page.

 **Gantt View**
View list items in a Gantt chart to see a graphical representation of how a team's tasks relate over time.

 **Calendar View**
View data as a daily, weekly, or monthly calendar.

- c. On the Create View page, in the **View Name** box, enter a name for your view. Select the **Make this the default view** if you want to make this the default view for the List Collection web part. Only public view can be the default view for the web part.

Name

Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they select this view.

View Name:

Make this the default view
(Applies to public views only)

- d. In the **Audience** section, under **View Audience**, select **Create a Personal View** or **Create a Public View**. By default, **Create a Public View** is selected.

Audience

Select the option that represents the intended audience for this view.

View Audience:

Create a Personal View
Personal views are intended for your use only.

Create a Public View
Public views can be visited by anyone using the site.

- e. In the **Filter** section, select lists and list views to filter items on the web part.

Display	Site Name	List Name	Folder Name	View Name
<input checked="" type="checkbox"/>	BoostSolutions	PD Project	PD Project	All tasks <input type="button" value="v"/>

- f. 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, select the order of the columns in the view.

Columns

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 left box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Task Name	1 <input type="button" value="v"/>
<input checked="" type="checkbox"/>	Priority	2 <input type="button" value="v"/>
<input checked="" type="checkbox"/>	Task Status	3 <input type="button" value="v"/>
<input checked="" type="checkbox"/>	Manager	4 <input type="button" value="v"/>
<input checked="" type="checkbox"/>	Start Date	5 <input type="button" value="v"/>
<input checked="" type="checkbox"/>	Due Date	6 <input type="button" value="v"/>
<input checked="" type="checkbox"/>	From Site	7 <input type="button" value="v"/>
<input checked="" type="checkbox"/>	From List	8 <input type="button" value="v"/>

- g. 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 items as you do it in list.

Link to:

Task Name

For example, if you select Title in the drop-down list, the Edit menu will be linked to Title. You can edit items in the List Collection web part the same way as list.

New ▾ Actions ▾ Settings ▾

Task Name	Priority	Task Status	Manager
ARB plan	High	Completed	Claus Kong
View Item	High	Completed	Dexter Morgen
Edit Item	High	Completed	Elmer Tompkins
Manage Permissions	Normal	In Progress	Goldie Almond
Delete Item	Normal	In Progress	Glenda Phillips
Alert Me	Low	Not Started	Bruce lee
	Low	Not Started	Brandy Walker


h. In the **Sort** section, set the order in which items in the view are displayed.


Sort

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

Sort by the column:

Priority ▾

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

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

For example, show items in a task list sorted by Priority.

New ▾ Actions ▾ Settings ▾

Task Name	Priority ↑	Task Status	Manager
ARB plan	High	Completed	Claus Kong
ARB evaluation	High	Completed	Dexter Morgen
ARB analysis	High	Completed	Elmer Tompkins
ARB demo	Low	Not Started	Bruce lee
ARB release	Low	Not Started	Brandy Walker
ARB develop	Normal	In Progress	Goldie Almond
ARB test	Normal	In Progress	Glenda Phillips

i. In the **Header Filter** section, you can enable the Header Filter function. The Header Filter function helps you to filter items according to column values in the view. For more information, please see [Column Header Filter](#).

Header Filter

Enable/Disable the header filter.

Enable filter on header


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


Group By

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

Group by the column:

Priority ▼

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

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

By default, show groupings:

Collapsed Expanded

Number of groups to display per page:

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

Task Name	Priority ↑	Task Status	Manager	Start Date
▲ Priority : High (3)				
ARB plan	High	Completed	Claus Kong	8/1/2017
ARB evaluation	High	Completed	Dexter Morgen	8/21/2017
ARB analysis	High	Completed	Elmer Tompkins	9/2/2017
▲ Priority : Low (2)				
ARB demo	Low	Not Started	Bruce lee	11/28/2017
ARB release	Low	Not Started	Brandy Walker	12/1/2017
▲ Priority : Normal (2)				
ARB develop	Normal	In Progress	Goldie Almond	9/27/2017
ARB test	Normal	In Progress	Glenda Phillips	10/27/2017

- k. 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
Task Name	Count <input type="button" value="v"/>
Priority	None <input type="button" value="v"/>
Task Status	None <input type="button" value="v"/>
Start Date	None <input type="button" value="v"/>
Due Date	None <input type="button" value="v"/>

By setting the title column to Count in a task list, for example, the view will display the number of tasks in the view.

[New](#) ▾ [Actions](#) ▾ [Settings](#) ▾

Task Name	Priority	Task Status	Manager
Count= 7			
ARB plan	High	Completed	Claus Kong
ARB evaluation	High	Completed	Dexter Morgen
ARB analysis	High	Completed	Elmer Tompkins
ARB develop	Normal	In Progress	Goldie Almond
ARB test	Normal	In Progress	Glenda Phillips
ARB demo	Low	Not Started	Bruce lee
ARB release	Low	Not Started	Brandy Walker

- l. In the **Item Limit** section, you can specify the number of items to display per page. The default value is 50.

Item Limit

Use an item limit to limit the amount of data that is returned to users of this view.

Number of items to display:

- m. Click **OK** to save the settings.

BoostSolutions List Collection Web Part

New ▾ Actions ▾ Settings ▾ View: [Standard View](#)

Task Name	Priority	Task Status	Manager	Start Date	Due Date ↑	From Site	From List
ARB plan	High	Completed	Claus Kong	8/1/2017	8/20/2017	BoostSolutions	PD Project
ARB evaluation	High	Completed	Dexter Morgen	8/21/2017	8/31/2017	BoostSolutions	PD Project
ARB analysis	High	Completed	Elmer Tompkins	9/2/2017	9/25/2017	BoostSolutions	PD Project
ARB develop	Normal	In Progress	Goldie Almond	9/27/2017	11/27/2017	BoostSolutions	PD Project
ARB test	Normal	In Progress	Glenda Phillips	10/27/2017	11/27/2017	BoostSolutions	PD Project
ARB demo	Low	Not Started	Bruce lee	11/28/2017	11/30/2017	BoostSolutions	PD Project
ARB release	Low	Not Started	Brandy Walker	12/1/2017	12/5/2017	BoostSolutions	PD Project

4.3.2 Create a Calendar View

- On the Settings menu, click **Create Collection View**. Or, on the View menu, click **Create View**.
- In the **Choose a view format** section, select **Calendar View**.

Create View ⓘ

Choose a view format



Standard View

View data on a Web page.



Gantt View

View list items in a Gantt chart to see a graphical representation of how a team's tasks relate over time.



Calendar View

View data as a daily, weekly, or monthly calendar.

- On the Create View page, in the **View Name** box, enter a name for your view. Select "Make this the default view" if you want to make this the default view for the List Collection web part. Only public view can be the default view for the web part.

Name

Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they select this view.

View Name:

Make this the default view
(Applies to public views only)

- In the **Audience** section, under **View Audience**, select **Create a Personal View** or **Create a Public View**. By default, **Create a Public View** is selected.

Audience

Select the option that represents the intended audience for this view.

View Audience:

- Create a Personal View
Personal views are intended for your use only.
- Create a Public View
Public views can be visited by anyone using the site.

e. In the **Filter** section, select lists and list views to filter items on the web part.

Display	Site Name	List Name	Folder Name	View Name
<input checked="" type="checkbox"/>	BoostSolutions	PD Project	PD Project	All tasks <input type="button" value="v"/>
<input checked="" type="checkbox"/>	BoostSolutions	PT Project	PT Project	All tasks <input type="button" value="v"/>

f. In the **Calendar Columns** section, specify the view's title and sub heading. If you do not want to display list items under the calendar view, select the **Don't display list items** option.

Calendar Columns

Specify columns to be represented in the Calendar Views. The Title fields are required fields. The Sub Heading fields are optional fields.

Month View Title:

Task Name

Week View Title:

Task Name

Week View Sub Heading:

Manager

Day View Title:

Task Name

Day View Sub Heading:

Manager

Don't display list items

Note

If you select the **Don't display list items** option, the **Columns**, **Edit Menu**, **Header Filter** and **Group By** sections will be hidden in this configuration page.

g. In the **Default Scope** section, choose the default scope for the view.

Default Scope

Choose the default scope for the view.

Default scope:

- Day
- Week
- Month

You can change this at any time while using the calendar.

- h. In the **Time Interval** section, specify the columns used to place items in the calendar.

Time Interval

Specify the columns used to place items in the calendar.

Begin:

Start Date

End:

Due Date

- i. 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, select the order of the columns in the view.

Columns

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 left box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Task Name	1 <input type="text"/>
<input checked="" type="checkbox"/>	Priority	2 <input type="text"/>
<input checked="" type="checkbox"/>	Task Status	3 <input type="text"/>
<input checked="" type="checkbox"/>	Manager	4 <input type="text"/>
<input checked="" type="checkbox"/>	Start Date	5 <input type="text"/>
<input checked="" type="checkbox"/>	Due Date	6 <input type="text"/>
<input checked="" type="checkbox"/>	From Site	7 <input type="text"/>
<input checked="" type="checkbox"/>	From List	8 <input type="text"/>

- j. 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 items as you do it in list.

Link to:

Task Name



- k. In the **Sort** section, set the order in which items in the view are displayed.

Sort

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

Sort by the column:

Task Status ▼

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

- I. In the **Header Filter** section, you can enable the Header Filter function. The Header Filter function helps you to filter items according to column values in the view. For more information, please see [Column Header Filter](#).

Header Filter

Enable/Disable the header filter.

Enable filter on header



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

Group By

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

Group by the column:

Task Status ▼

-  Show groups in ascending order (A, B, C, or 1, 2, 3)
-  Show groups in descending order (C, B, A, or 3, 2, 1)

By default, show groupings:

Collapsed Expanded

- n. 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
Task Name	None ▼
Priority	None ▼
Task Status	None ▼
Start Date	None ▼
Due Date	None ▼

- o. In the **Item Limit** section, you can specify the number of items to display per page. The default value is 50.

Item Limit

Use an item limit to limit the amount of data that is returned to users of this view.

Number of items to display:

- p. Click **OK** to save the view.

BoostSolutions List Collection Web Part

New ▾ Actions ▾ Settings ▾ View: [Calendar View](#)

◀ ▶ November 2017 [Expand All](#) [Collapse All](#) | [1](#) Day [7](#) Week [31](#) **Month**

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
29	30	31	1	2	3	4
ARB develop						
PT develop						
ARB test						
5	6	7	8	9	10	11
ARB develop						
PT develop						
ARB test						
					▼ 1 more item	▼ 1 more item
12	13	14	15	16	17	18
ARB develop						
PT develop						
ARB test						
▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item
19	20	21	22	23	24	25
ARB develop						
PT develop						
ARB test						
▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item
26	27	28	29	30	1	2
ARB develop		ARB demo			ARB release	
PT develop						
ARB test						
▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item	▼ 1 more item

4.3.3 Create a Gantt View

- a. On the **Settings** menu, click **Create Collection View**. Or, on the View menu, click **Create View**.
- b. In the **Choose a view format** section, select **Gantt View**.

Create View

Choose a view format



Standard View

View data on a Web page.



Gantt View

View list items in a Gantt chart to see a graphical representation of how a team's tasks relate over time.



Calendar View

View data as a daily, weekly, or monthly calendar.

- c. On the Create View page, in the **View Name** box, enter a name for your view. Select "Make this the default view" if you want to make this the default view for the List Collection web part. Only public view can be the default view for the web part.

Name

Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they select this view.

View Name:

Make this the default view
(Applies to public views only)

- d. In the **Audience** section, under **View Audience**, select **Create a Personal View** or **Create a Public View**. By default, **Create a Public View** is selected.

Audience

Select the option that represents the intended audience for this view.

View Audience:

- Create a Personal View
Personal views are intended for your use only.
- Create a Public View
Public views can be visited by anyone using the site.

- e. In the **Filter** section, select lists and list views to filter the items on the web part.

Display	Site Name	List Name	Folder Name	View Name
<input checked="" type="checkbox"/>	BoostSolutions	PD Project	PD Project	All tasks 
<input checked="" type="checkbox"/>	BoostSolutions	PT Project	PT Project	All tasks 

- f. In the **Gantt Columns** section, specify the columns to be represented in the Gantt chart. If you do not want to display list items under the Gantt view, select the **Don't display list items** option.

Gantt Columns

Specify columns to be represented in the Gantt chart. Start Date and Due Date are required date fields. Title is a required text field. Percent Complete is an optional number field. If no fields appear in a list, they must be created to support this view.

Title:

Task Name

Start Date:

Start Date

Due Date:

Due Date

Percent Complete:

Optional

Don't display list items

Note

If you select the **Don't display list items** option, the **Columns**, **Edit Menu**, **Header Filter** and **Group By** sections will be hidden in this configuration page.

- g. 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, select the order of the columns in the view.

Columns

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 left box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Task Name	1 <input type="text"/>
<input checked="" type="checkbox"/>	Priority	2 <input type="text"/>
<input checked="" type="checkbox"/>	Task Status	3 <input type="text"/>
<input checked="" type="checkbox"/>	Manager	4 <input type="text"/>
<input checked="" type="checkbox"/>	Start Date	5 <input type="text"/>
<input checked="" type="checkbox"/>	Due Date	6 <input type="text"/>
<input checked="" type="checkbox"/>	From Site	7 <input type="text"/>
<input checked="" type="checkbox"/>	From List	8 <input type="text"/>

- h. 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 items as you do it in list.

Link to:

Task Name


- i. In the **Sort** section, set the order in which items in the view are displayed.
- j. In the **Header Filter** section, you can enable the Header Filter function. The Header Filter function helps you to filter items according to column values in the view. For more information, please see [Column Header Filter](#).
- k. 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 Priority.
- l. In the **Totals** section, select the column which you want to display summary calculations in the view, such as count, average, maximum, minimum.
- m. In the **Item Limit** section, you can specify the number of items to display per page. The default value is 50.
- n. Click **OK** to save the view.



4.4 Column Header Filter

Column Header Filter function helps you to filter items according to column values in Standard, Calendar and Gantt view.

For example, if you want to display tasks which status are completed in Standard view.

- a. Switch to a Standard view.
- b. Click the arrow next to the **Task Status** column of the web part, choose **Completed**. The web part will show all tasks that status is completed and there will be a  next to the **Task Status** column.

New ▾ Actions ▾ Settings ▾

Task Name	Priority	Task Status ▾	Manager	Start Date
ARB plan		A ↓ Ascending	Claus Kong	8/1/2017
PT plan		Z ↓ Descending	Claus Kong	8/10/2017
ARB evaluation		Clear Filter from Task Status	Dexter Morgen	8/21/2017
PT evaluation		Completed	Dexter Morgen	8/26/2017
ARB analysis		In Progress	Elmer Tompkins	9/2/2017
PT analysis		Not Started	Elmer Tompkins	9/13/2017
ARB develop			Goldie Almond	9/27/2017
ARB test			Glenda Phillips	10/27/2017


c. The result can be seen as follows:

BoostSolutions List Collection Web Part

New ▾ Actions ▾ Settings ▾ View: Standard View

Task Name	Priority	Task Status ▾	Manager	Start Date	Due Date ↑	From Site	From List
ARB plan	High	Completed	Claus Kong	8/1/2017	8/20/2017	BoostSolutions	PD Project
PT plan	Normal	Completed	Claus Kong	8/10/2017	8/25/2017	BoostSolutions	PT Project
ARB evaluation	High	Completed	Dexter Morgen	8/21/2017	8/31/2017	BoostSolutions	PD Project
PT evaluation	Normal	Completed	Dexter Morgen	8/26/2017	9/10/2017	BoostSolutions	PT Project
ARB analysis	High	Completed	Elmer Tompkins	9/2/2017	9/25/2017	BoostSolutions	PD Project
PT analysis	High	Completed	Elmer Tompkins	9/13/2017	9/30/2017	BoostSolutions	PT Project

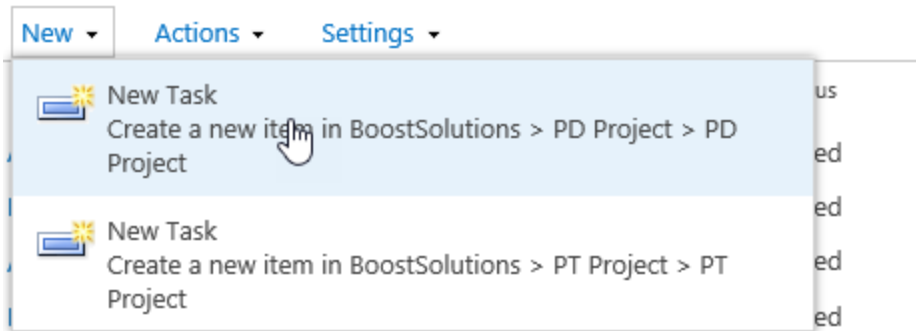
Note

You can click  Clear Filter from Task Status to clear the filter on the column header.

4.5 Manage Items on Web Part

The List Collection Web Part allows you to add, edit and delete items to different lists. Original lists will auto-update accordingly.

- a. In the New drop-down menu, you can choose which list to add an item to.
- b. For example, you can add an item to the Task Schedule list on the BoostSolutions site.



c. A new item is added to the web part.

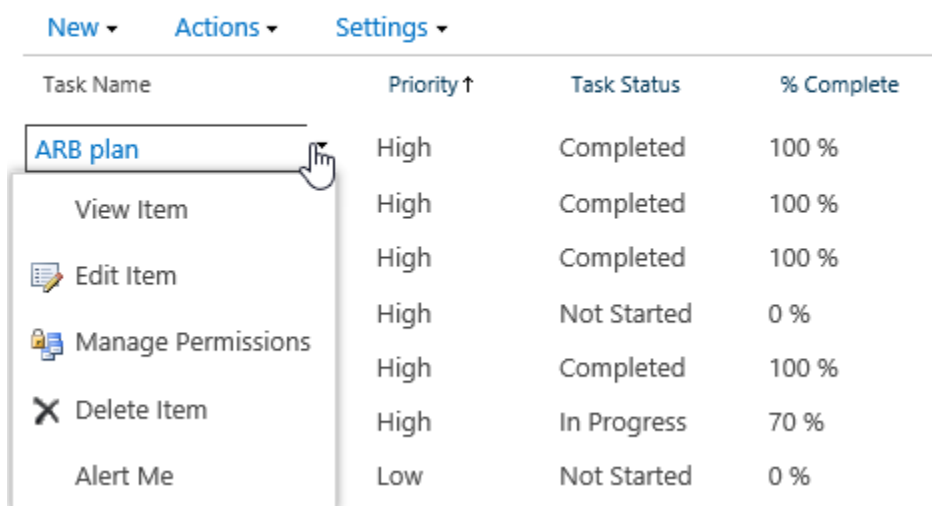
BoostSolutions List Collection Web Part

New ▾ Actions ▾ Settings ▾ View: Standard View

Task Name	Priority ↑	Task Status	% Complete	Manager	Start Date	Due Date	From Site	From List
ARB plan	High	Completed	100 %	Claus Kong	8/1/2017	8/20/2017	BoostSolutions	PD Project
ARB evaluation	High	Completed	100 %	Dexter Morgen	8/21/2017	8/31/2017	BoostSolutions	PD Project
ARB analysis	High	Completed	100 %	Elmer Tompkins	9/2/2017	9/25/2017	BoostSolutions	PD Project
Project summary NEW	High	Not Started	0 %	Claus Kong	12/7/2017	12/8/2017	BoostSolutions	PD Project
PT analysis	High	Completed	100 %	Elmer Tompkins	9/13/2017	9/30/2017	BoostSolutions	PT Project
PT develop	High	In Progress	70 %	Goldie Almond	10/2/2017	12/27/2017	BoostSolutions	PT Project
ARB demo	Low	Not Started	0 %	Bruce lee	11/28/2017	11/30/2017	BoostSolutions	PD Project
ARB release	Low	Not Started	0 %	Brandy Walker	12/1/2017	12/5/2017	BoostSolutions	PD Project
PT test	Low	In Progress	50 %	Glenda Phillips	11/10/2017	12/27/2017	BoostSolutions	PT Project
PT demo	Low	Not Started	0 %	Bruce lee	1/8/2018	1/13/2018	BoostSolutions	PT Project

To view, edit or delete an item, click context menu of target item. Also, you can manage item permissions or setup an alert me on the item. Any changes of item will be updated to the original items.

BoostSolutions List Collection Web Part

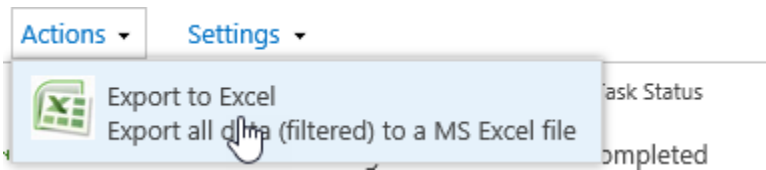


5. Export to Excel

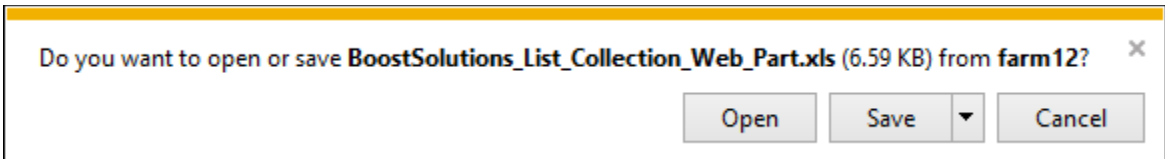
List Collection allows you to export collected data to MS Excel. This is a convenient way to view data and saves time, as opposed to going into each list and exporting list items separately.

To export a view, follow these steps:

- a. Select the view you want to export.
- b. Click **Export to Excel** on the **Actions** menu.



- c. A File Download dialog box will appear.



- d. Click **Save** to save the excel file.

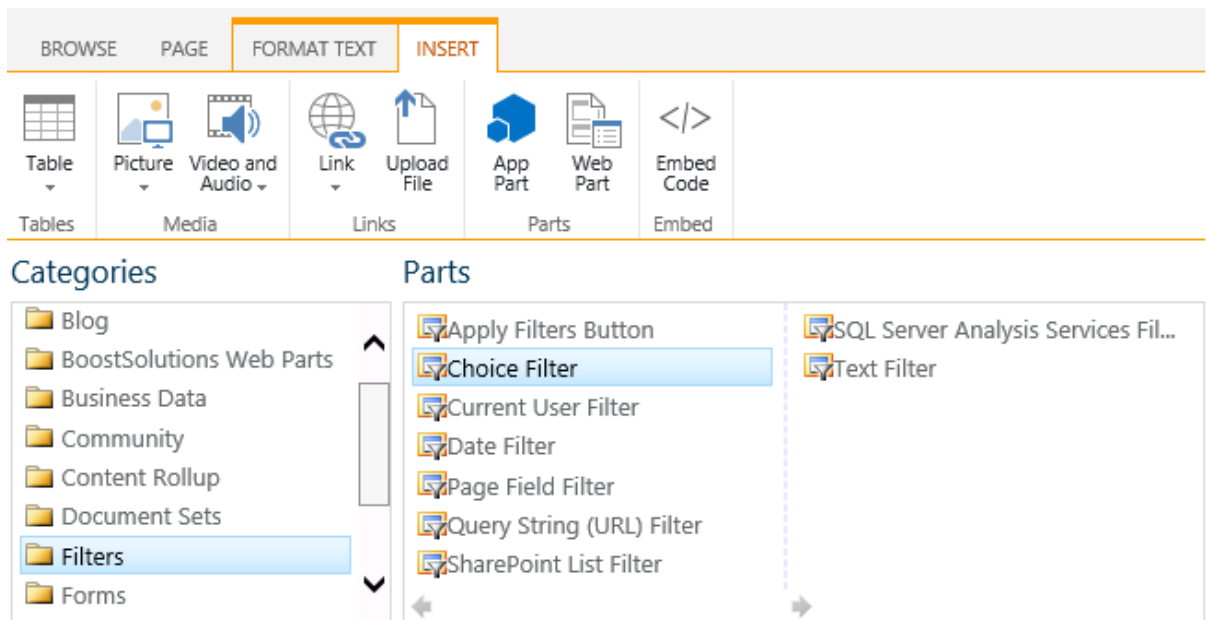
6. Connect to Filter Web Parts

SharePoint List collection supports two types of SharePoint filter web parts: Choice and Text. You can connect List Collection Web Part to either filter to flexibly get your desired data.

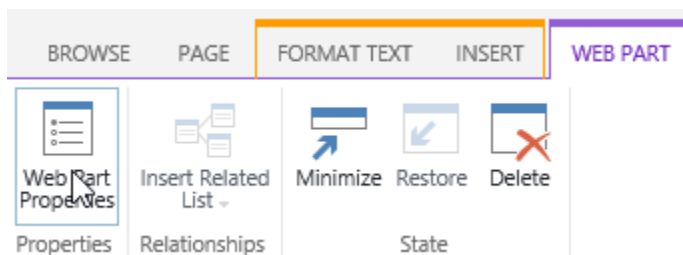
6.1 Connect to a Choice Filter Web Part

To edit a page, you must have at least Design permission level.

- a. Add a Choice Filter web part to a page where List Collection web part located.



- b. Select the Choice Filter web part, and click **Web Part Properties** command in **WEB PART** tab.



- c. A configuration tool pane will appear as following on the right side; enter a name in the Filter Name box to identify the Web Part. Enter a list of values and an optional description that you

want a user to select from the "Select Filter Values" dialog box that appears when a user clicks the Filter button.

For example, if you have a list of tasks with a Status column, you can enter Not Started, In progress and Completed as a list of values, each value will appear on a separate line. These values are then used to match values that appear in the Status column of the List Collection Web Part when a user selects a value and presses ENTER.

Choice Filter

Filter

[Learn about filter web parts](#)

Filter Name

Choice Filter

Type each choice on a separate line.
To display a description, follow the
value with the description,
separating them with ";"

Not Started
In Progress
Completed

+ Advanced Filter Options

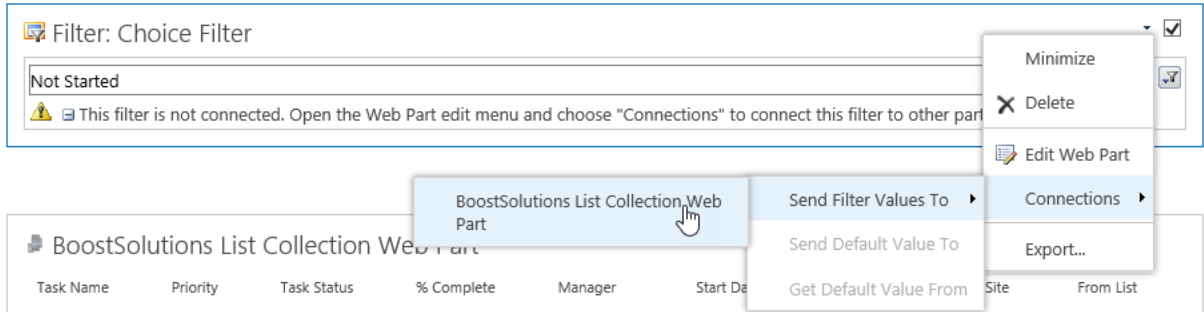
+ Appearance

+ Layout

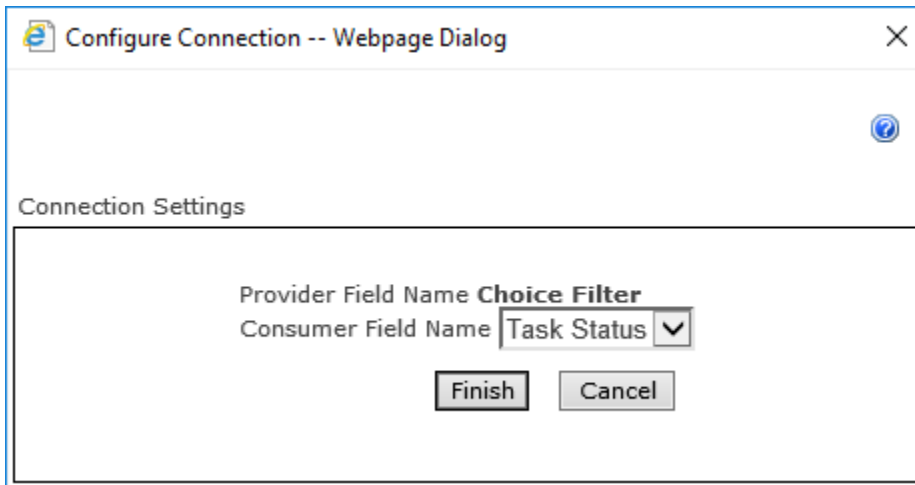
+ Advanced

OK Cancel Apply

- d. Optionally, configure the other settings as per your needs.
- e. To save your changes click **OK**.
- f. To connect to the Choice Filter Web Part, open the Choice Web Part drop down menu and click **Connections>Send Filter Values To>BoostSolutions List Collection Web Part**.



- g. In the **Configure Connection** dialog box, set the **Consumer Field Name** to the column that you want to filter the List Collection Web Part by, and then click Finish.



- h. When you are done configuring the connection, in the **Page** tab, click **Save & Close** to save and view the page.
- i. To dynamically change the results in the List Collection Web Part, in the Choice Filter Web Part, click **Filter**, select a value and then click **OK**.

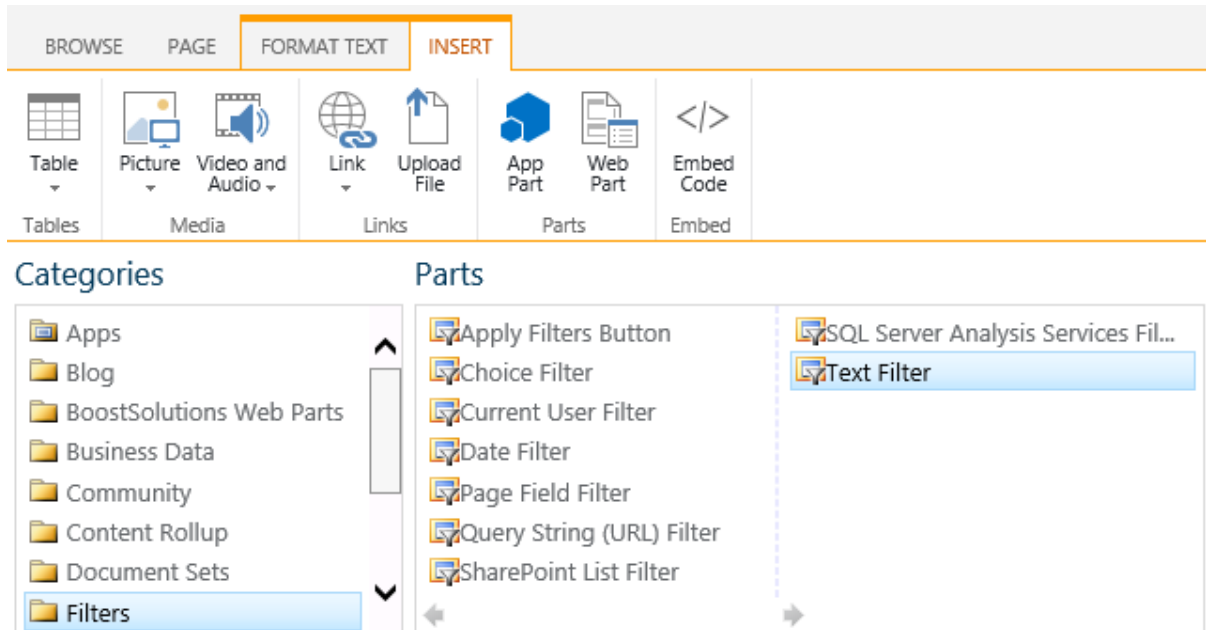
If you selected the **Allow Multiple selections** property, to redisplay all the values in the List View Web Part, you must clear all the check boxes in the **Select Filter Value(s)** dialog box, and then click **OK**.



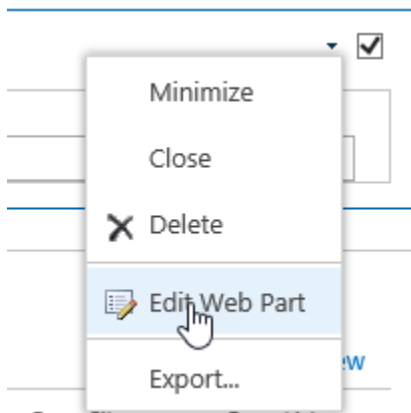
6.2 Connect to a Text Filter Web Part

To edit a page, you must have at least Design permission level.

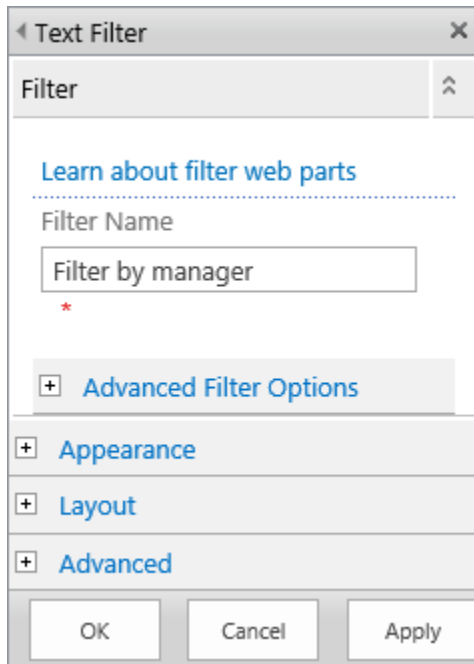
- a. Add a Text Filter web part to a List Collection web part page.



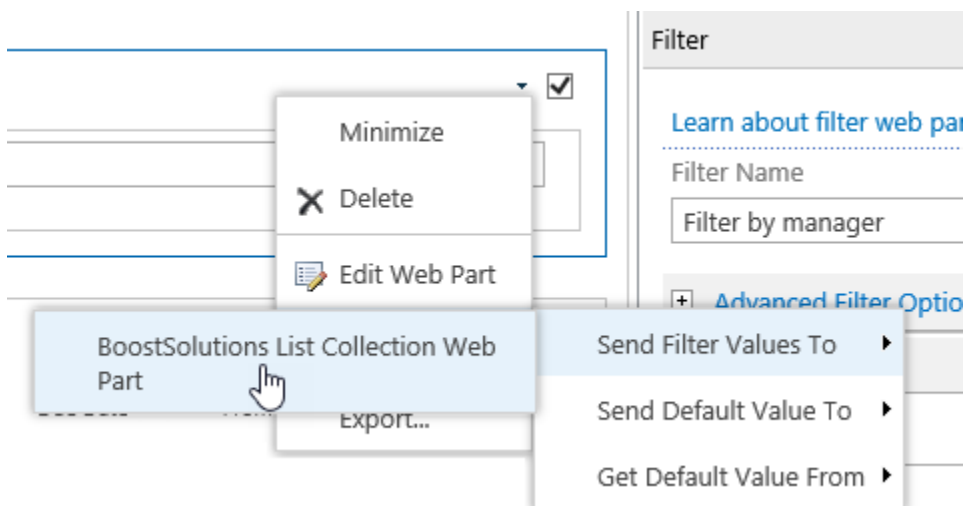
- b. Open the Text Filter web part drop down menu and select **Edit Web Part**.



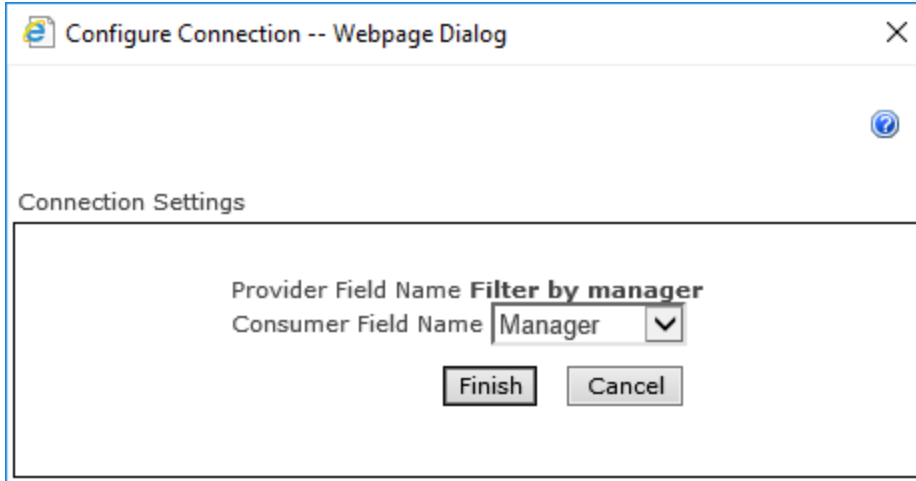
- c. In the tool pane, enter a name in the **Filter Name** box to identify the Web Part.



- d. Optionally, configure the other settings as per your needs.
- e. To save your changes, click **OK**.
- f. To connect to the Text Filter Web Part, open the Text Filter Web Part drop down menu and click **Connections>Send Filter Values To>BoostSolutions List Collection Web Part**.



- g. In the **Configure Connection** dialog box, set the **Consumer Field Name** to the column that you want to filter the List Collection web part by and then click **Finish**.



- h. When you are done configuring the connection, in the **Page** tab, click **Save & Close** to save and view the page.
- i. To dynamically change the results in the List Collection Web Part, enter some text in the Text Filter Web Part text box. Ensure that the text exactly matches the value in the column that you specified in the connection you made previously. After entering text, hit Enter to see the results. To redisplay all the values in the List Collection Web Part, clear the text box and then hit ENTER again.

Filter by manager

BoostSolutions List Collection Web Part

[New](#) ▾ [Actions](#) ▾ [Settings](#) ▾ View: [Default View](#)

Task Name	Priority	Task Status	% Complete	Manager	Start Date	Due Date	From Site	From List
ARB develop	Normal	In Progress	70 %	Goldie Almond	9/27/2017	11/27/2017	BoostSolutions	PD Project
PT develop	High	In Progress	70 %	Goldie Almond	10/2/2017	12/27/2017	BoostSolutions	PT Project

d

7. 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 1: License Management

You can use List Collection 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. In the products main page, click the trial link and enter the License Management Center.
- 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: 8fa4fcbbbeab9475d8b8f10d2c7b27e1e982261612
75d49c683442a828de45bdd

Farm License
Farm ID: {8fa4fcbb-eab9-475d-8b8f-10d2c7b27e1e}
Number of Users: 43 user(s)

Site Collection License
Site Collection ID: Select a site collection
Site Collection:

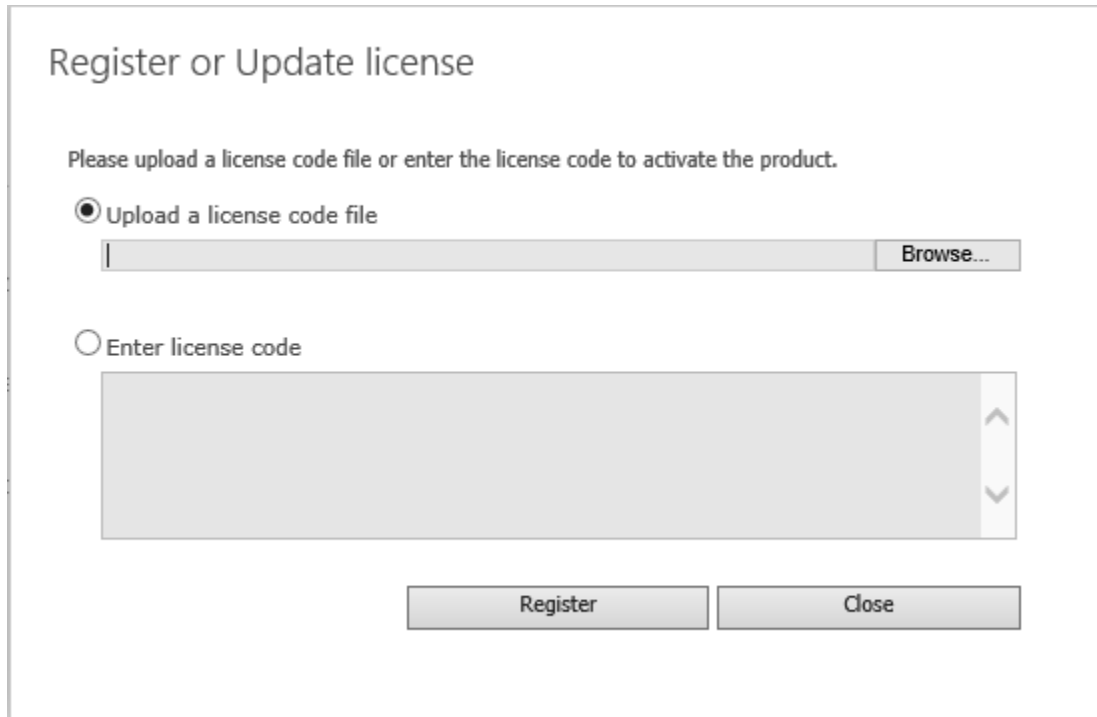
Download Close

In order for BoostSolutions to create a license for you, you MUST 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.

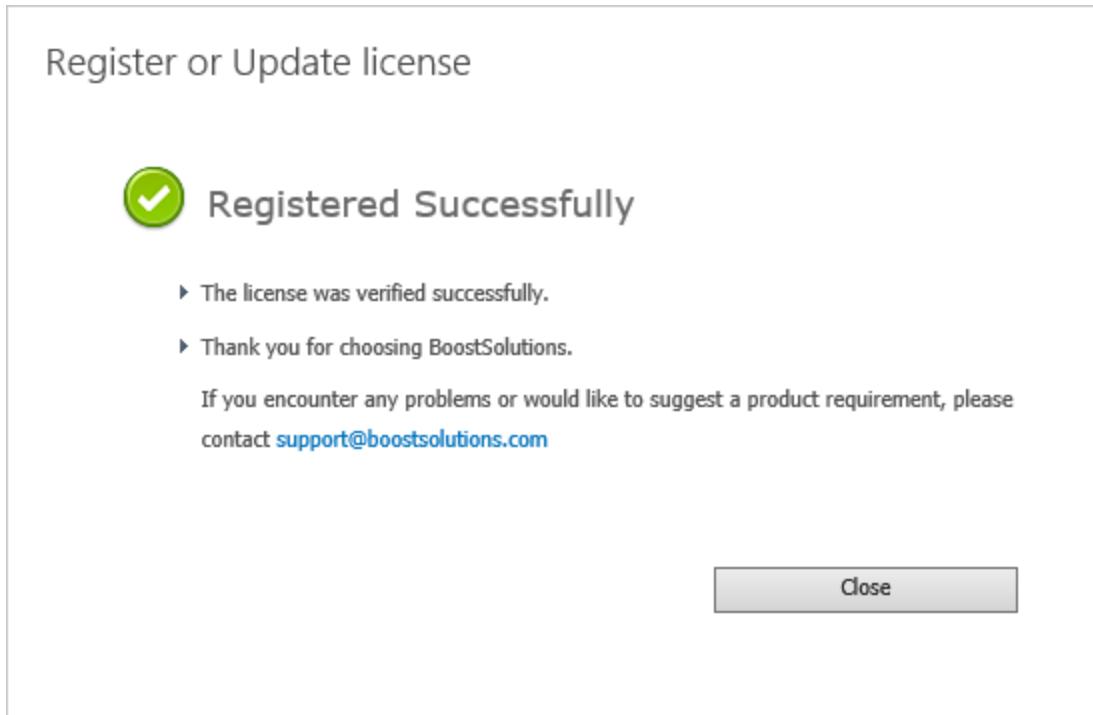
License Registration

- 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.



The screenshot shows a dialog box titled "Register or Update license". Inside the dialog, there is a prompt: "Please upload a license code file or enter the license code to activate the product." Below this prompt are two radio button options. The first option, "Upload a license code file", is selected. It is followed by a text input field and a "Browse..." button. The second option, "Enter license code", is unselected and is followed by a large text area with a vertical scrollbar. At the bottom of the dialog, there are two buttons: "Register" and "Close".

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



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