



# List Collection 3.0

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## User Guide

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## 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:

<https://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](http://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\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\4.6\Setup.exe	The product installer for .Net Framework 4.6.
Library\4.6\Setup.exe.config	A file containing the configuration information for the installer.
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/Subscription Edition.
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/Subscription Edition.
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 Server Subscription Edition

Operating System	Windows Server 2019 Standard or Datacenter Windows Server 2022 Standard or Datacenter
Server	Microsoft SharePoint Server Subscription Edition
Browser	Microsoft Edge Mozilla Firefox Google Chrome

### 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 greater Microsoft Edge Mozilla Firefox Google Chrome

### SharePoint 2016

Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64
Server	Microsoft SharePoint Server 2016 Microsoft .NET Framework 4.6
Browser	Microsoft Internet Explorer 8 or above Mozilla Firefox Google Chrome

### SharePoint 2013

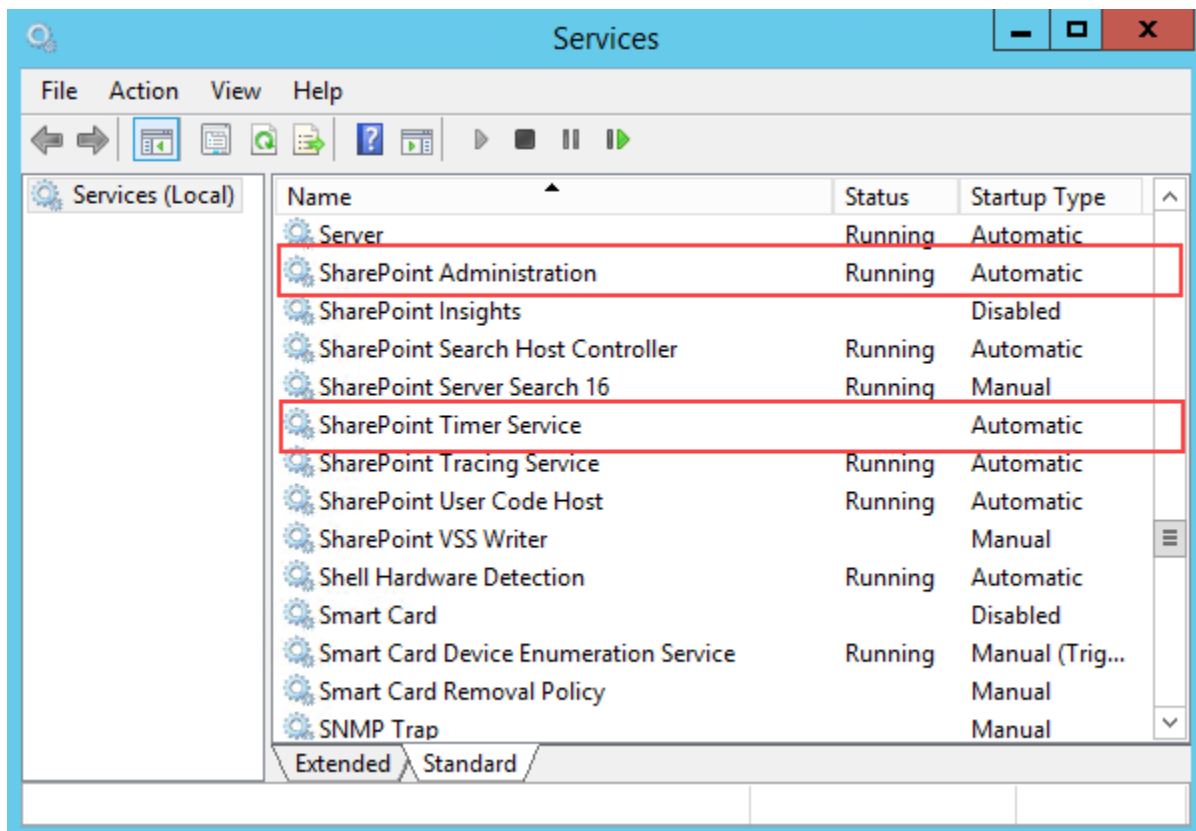
Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1
Server	Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5
Browser	Microsoft Internet Explorer 8 or above Mozilla Firefox Google Chrome

## 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 you 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.

- a. On the Central Administration Home page, click **System Settings**.
- b. In the Farm Management section, click **Manage farm solutions**.
- c. On the Solution Management page, check whether the solution "BoostSolutions.ListCollectionSetup16.3.wsp" is deployed to the web applications.
- d. On the Solution Properties page, click **Deploy Solution**.
- e. On the Deploy Solution page, in the Deploy When section, select **Now**.
- f. In the Deploy To? section, in the A specific web application list, click either All web applications or select a specific Web application.
- g. Click **OK**.

### **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 3.7.1013.0

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
<a href="#">ARB plan</a>	High	Completed	Claus Kong	8/1/2017	8/20/2017	<a href="#">BoostSolutions</a>	<a href="#">PD Project</a>
<a href="#">ARB evaluation</a>	High	Completed	Dexter Morgen	8/21/2017	8/31/2017	<a href="#">BoostSolutions</a>	<a href="#">PD Project</a>
<a href="#">ARB analysis</a>	High	Completed	Elmer Tompkins	9/2/2017	9/25/2017	<a href="#">BoostSolutions</a>	<a href="#">PD Project</a>
<a href="#">ARB develop</a>	Normal	In Progress	Goldie Almond	9/27/2017	11/27/2017	<a href="#">BoostSolutions</a>	<a href="#">PD Project</a>
<a href="#">ARB test</a>	Normal	In Progress	Glenda Phillips	10/27/2017	11/27/2017	<a href="#">BoostSolutions</a>	<a href="#">PD Project</a>
<a href="#">ARB demo</a>	Low	Not Started	Bruce lee	11/28/2017	11/30/2017	<a href="#">BoostSolutions</a>	<a href="#">PD Project</a>
<a href="#">ARB release</a>	Low	Not Started	Brandy Walker	12/1/2017	12/5/2017	<a href="#">BoostSolutions</a>	<a href="#">PD Project</a>

#### **Calendar View**

BoostSolutions List Collection Web Part

New Actions Settings

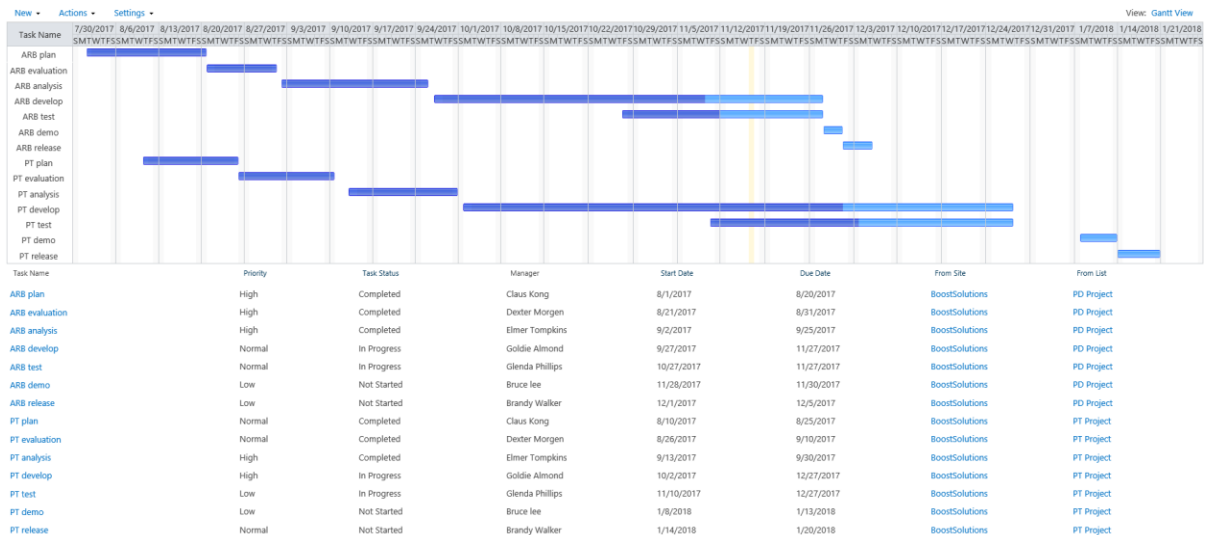
View: Calendar View

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

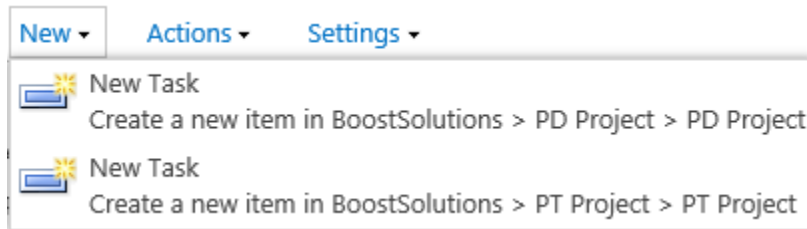
## Gantt View

BoostSolutions List Collection Web Part

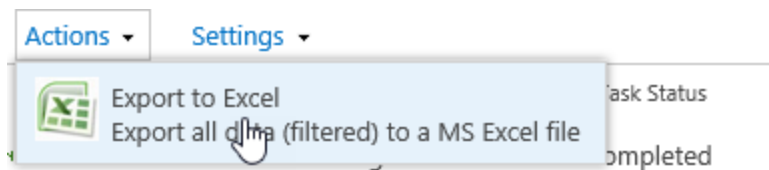


There are 4 drop-down menus on the web part:

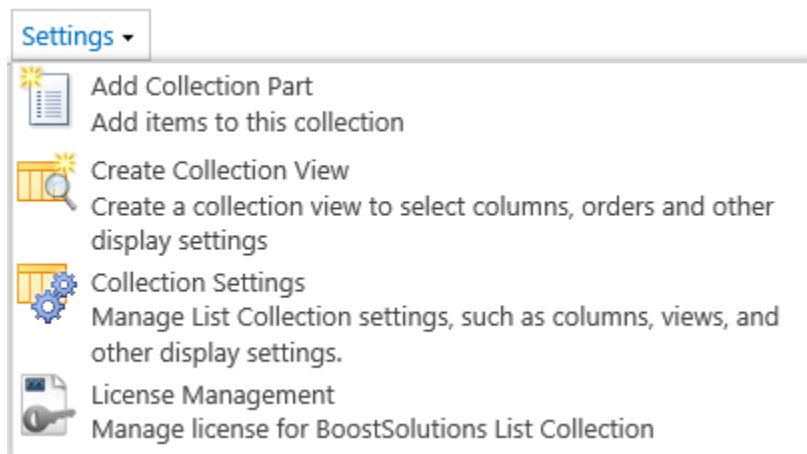
**New:** Add new items to different lists right on the web part. For more information, please see [Add new Items](#).



**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](#)

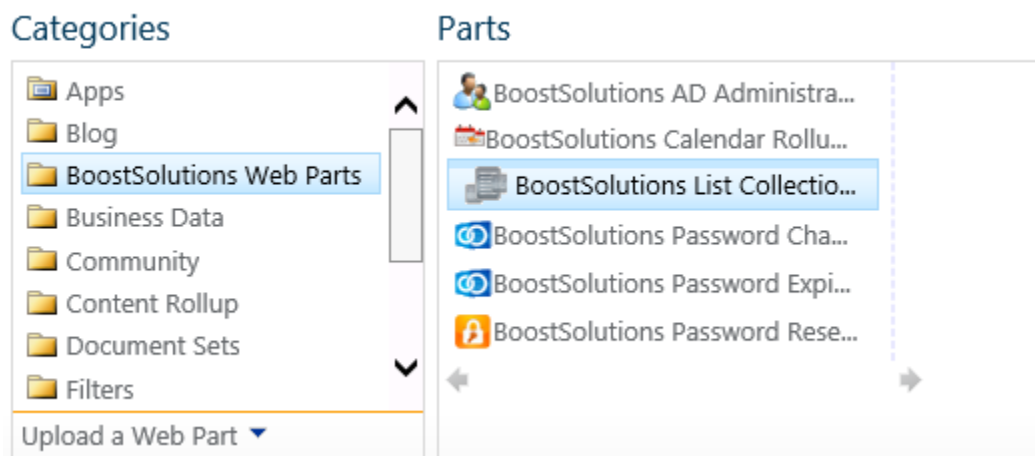
- Calendar View
- Gantt View
- Standard View
-  Modify this View
-  Create View

## 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**.

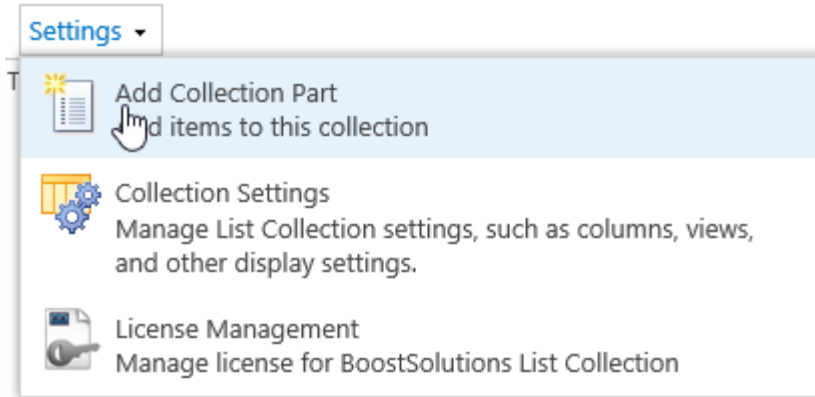


- Click **Save** to save the page. The List Collection web part will be added to the page.

### 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).

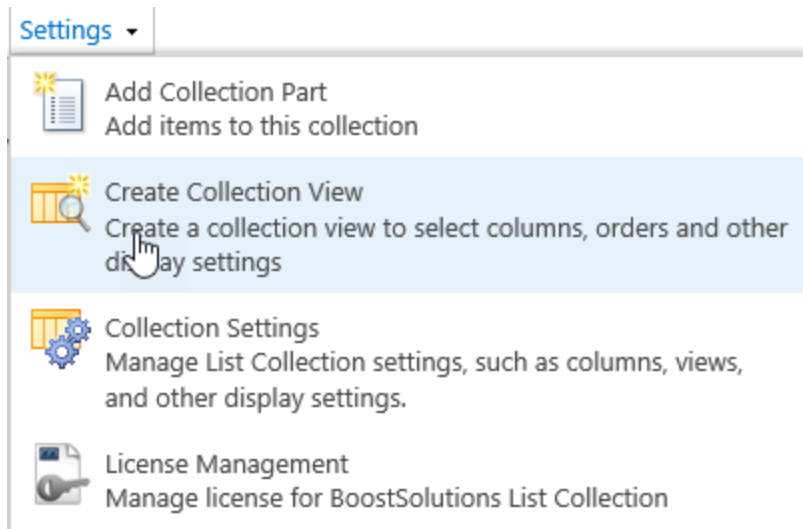
<input type="checkbox"/> ID	Map to:	ID
<input type="checkbox"/> Content Type	Map to:	Content Type
<input checked="" type="checkbox"/> Task Name	Map to:	Task Name
<input type="checkbox"/> Modified	Map to:	Modified
<input type="checkbox"/> Created	Map to:	Created
<input type="checkbox"/> Created By	Map 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

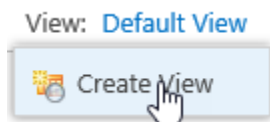
You can create views on the List Collection web part. There are three views: Standard View, Calendar View and Gantt View.

### 4.3.1 Create a Standard View

- 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.

New ▾ Actions ▾ Settings ▾

Task Name	Priority ↑	Task Status	Manager	Start Date
<b>▲ Priority : High (3)</b>				
<a href="#">ARB plan</a>	High	Completed	Claus Kong	8/1/2017
<a href="#">ARB evaluation</a>	High	Completed	Dexter Morgen	8/21/2017
<a href="#">ARB analysis</a>	High	Completed	Elmer Tompkins	9/2/2017
<b>▲ Priority : Low (2)</b>				
<a href="#">ARB demo</a>	Low	Not Started	Bruce lee	11/28/2017
<a href="#">ARB release</a>	Low	Not Started	Brandy Walker	12/1/2017
<b>▲ Priority : Normal (2)</b>				
<a href="#">ARB develop</a>	Normal	In Progress	Goldie Almond	9/27/2017
<a href="#">ARB test</a>	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
<b>Count= 7</b>			
<a href="#">ARB plan</a>	High	Completed	Claus Kong
<a href="#">ARB evaluation</a>	High	Completed	Dexter Morgen
<a href="#">ARB analysis</a>	High	Completed	Elmer Tompkins
<a href="#">ARB develop</a>	Normal	In Progress	Goldie Almond
<a href="#">ARB test</a>	Normal	In Progress	Glenda Phillips
<a href="#">ARB demo</a>	Low	Not Started	Bruce lee
<a href="#">ARB release</a>	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
<a href="#">ARB plan</a>	High	Completed	Claus Kong	8/1/2017	8/20/2017	<a href="#">BoostSolutions</a>	PD Project
<a href="#">ARB evaluation</a>	High	Completed	Dexter Morgen	8/21/2017	8/31/2017	<a href="#">BoostSolutions</a>	PD Project
<a href="#">ARB analysis</a>	High	Completed	Elmer Tompkins	9/2/2017	9/25/2017	<a href="#">BoostSolutions</a>	PD Project
<a href="#">ARB develop</a>	Normal	In Progress	Goldie Almond	9/27/2017	11/27/2017	<a href="#">BoostSolutions</a>	PD Project
<a href="#">ARB test</a>	Normal	In Progress	Glenda Phillips	10/27/2017	11/27/2017	<a href="#">BoostSolutions</a>	PD Project
<a href="#">ARB demo</a>	Low	Not Started	Bruce lee	11/28/2017	11/30/2017	<a href="#">BoostSolutions</a>	PD Project
<a href="#">ARB release</a>	Low	Not Started	Brandy Walker	12/1/2017	12/5/2017	<a href="#">BoostSolutions</a>	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)

- l. 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 <span style="float: right;">▼</span>
Priority	None <span style="float: right;">▼</span>
Task Status	None <span style="float: right;">▼</span>
Start Date	None <span style="float: right;">▼</span>
Due Date	None <span style="float: right;">▼</span>

- 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	High	Completed	Claus Kong	8/1/2017
PT plan	Normal	Completed	Claus Kong	8/10/2017
ARB evaluation	High	Completed	Dexter Morgen	8/21/2017
PT evaluation	Normal	Completed	Dexter Morgen	8/26/2017
ARB analysis	High	Completed	Elmer Tompkins	9/2/2017
PT analysis	High	Completed	Elmer Tompkins	9/13/2017
ARB develop	High	In Progress	Goldie Almond	9/27/2017
ARB test	Normal	In Progress	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

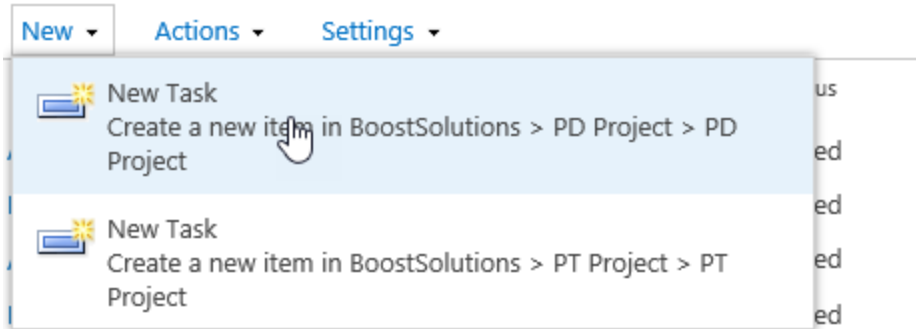
**Note**

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.

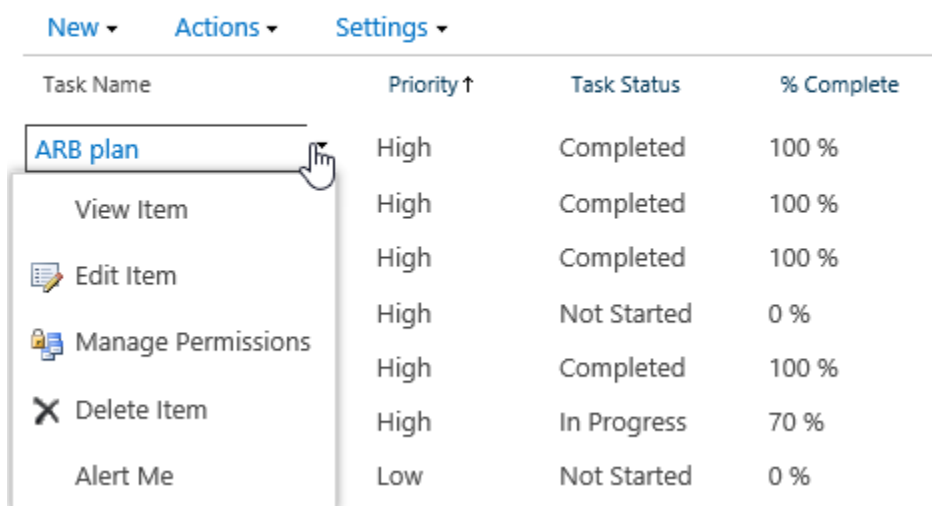
BoostSolutions List Collection Web Part

New ▾ Actions ▾ Settings ▾ View: Standard View

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

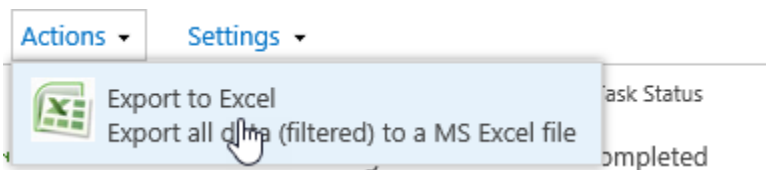


## 5. Export to Excel

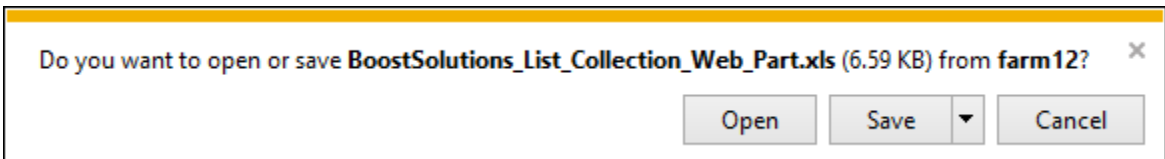
List Collection allows you to export collected data to MS Excel. This is a convenient way to view data and saves time, as opposed to going into each list and exporting list items separately.

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.

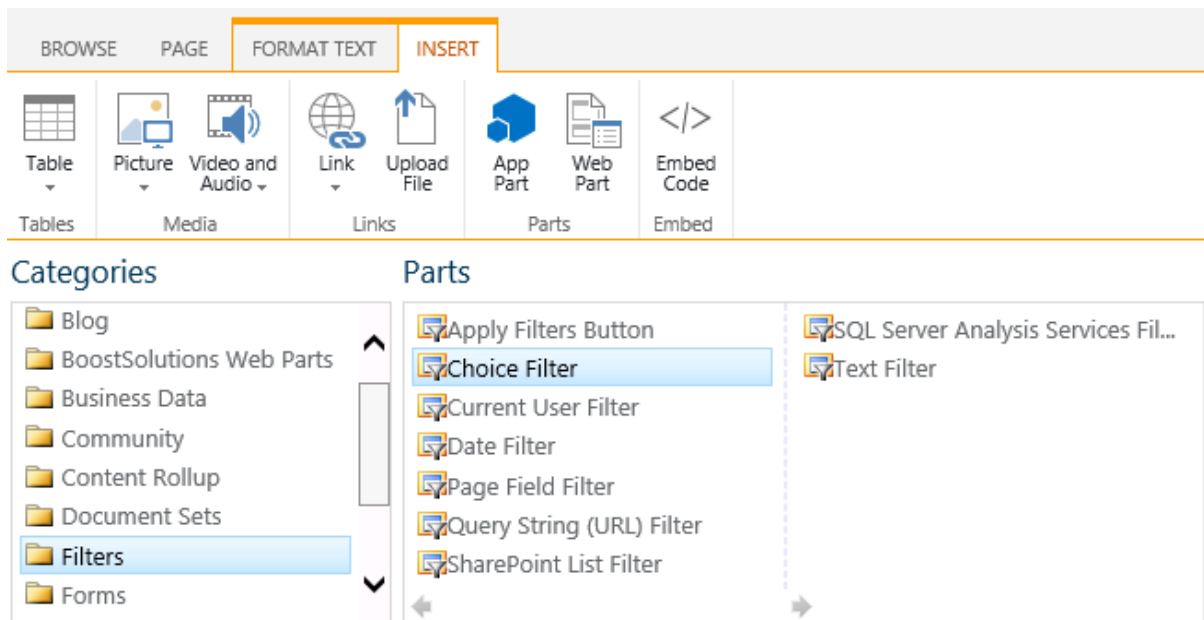
## 6. Connect to Filter Web Parts

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.

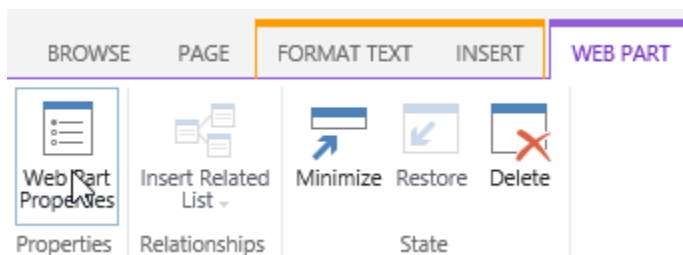
### 6.1 Connect to a Choice Filter Web Part

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

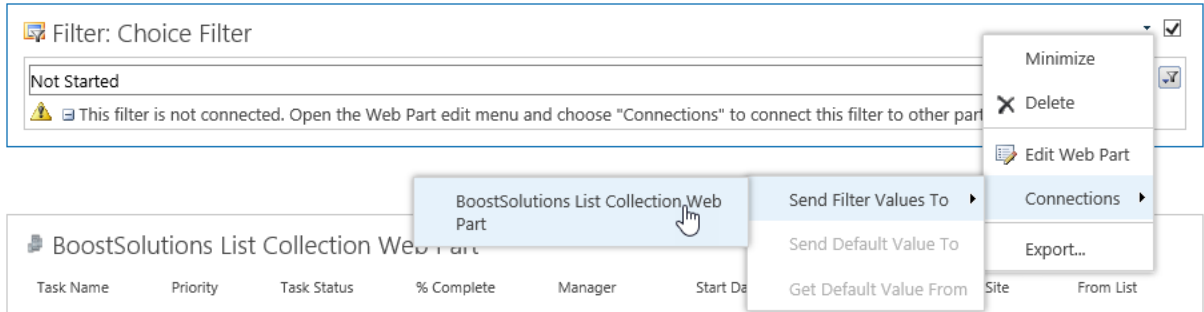
+ Appearance

+ Layout

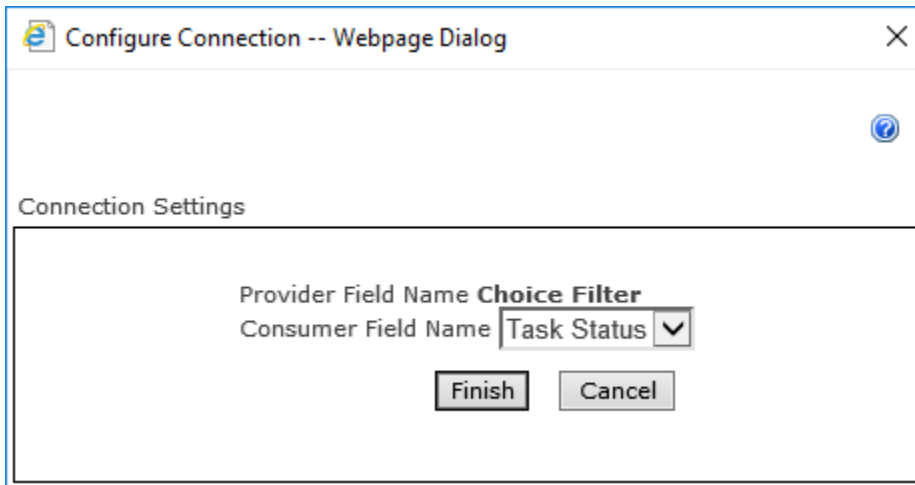
+ Advanced

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**.



BoostSolutions List Collection Web Part

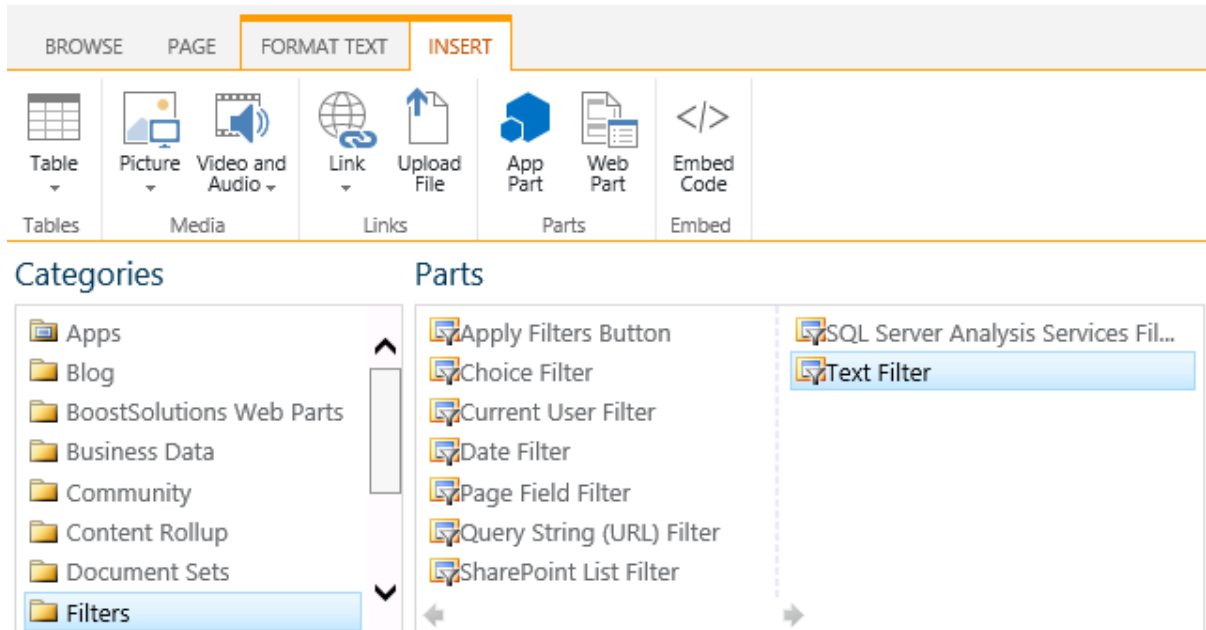
New Actions Settings View: Default View

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
ARB test	Normal	In Progress	50 %	Glenda Phillips	10/27/2017	11/27/2017	BoostSolutions	PD Project
PT develop	High	In Progress	70 %	Goldie Almond	10/2/2017	12/27/2017	BoostSolutions	PT Project
PT test	Low	In Progress	50 %	Glenda Phillips	11/10/2017	12/27/2017	BoostSolutions	PT Project

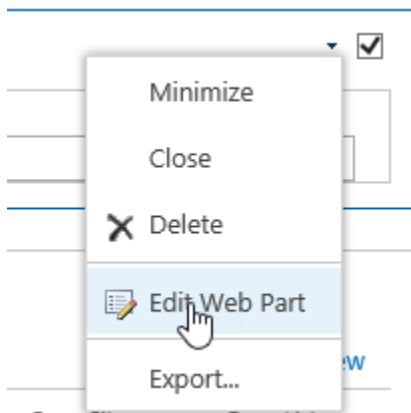
## 6.2 Connect to a Text Filter Web Part

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.

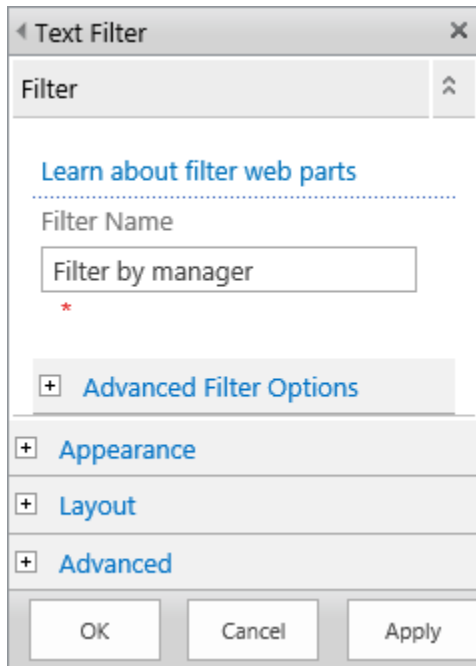


- b. Open the Text Filter web part drop down menu and select **Edit Web Part**.

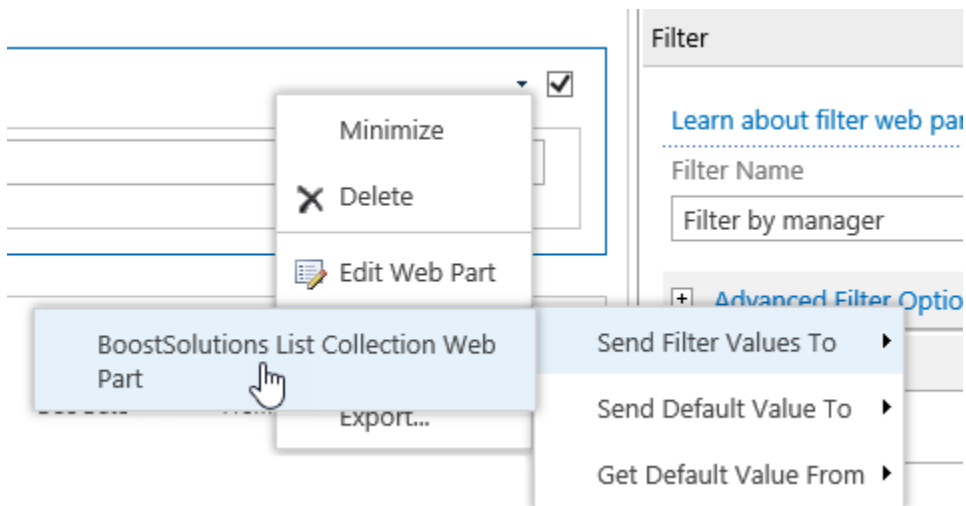


- c. In the tool pane, enter a name in the **Filter Name** box to identify the Web Part.

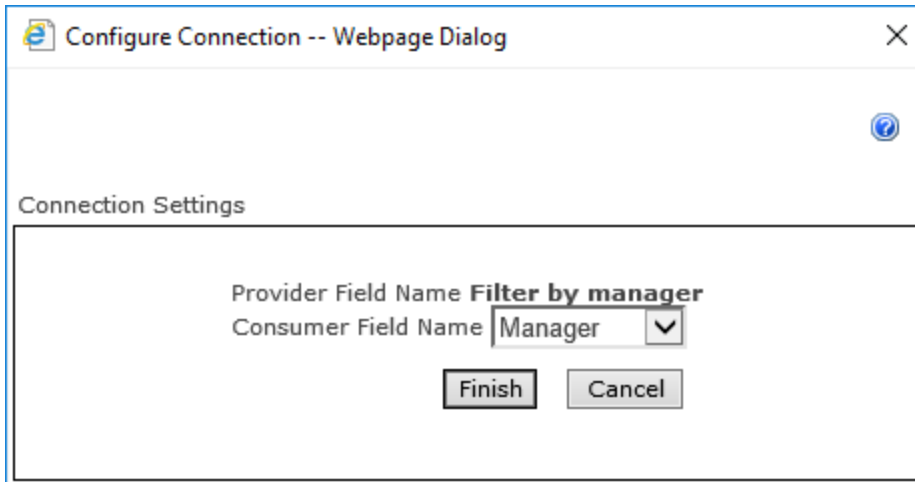




- d. Optionally, configure the other settings as per your needs.
- e. To save your changes, click **OK**.
- f. To connect to the Text Filter Web Part, open the Text Filter Web Part drop down menu and click **Connections>Send Filter Values To>BoostSolutions List Collection Web Part**.



- 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	<a href="#">BoostSolutions</a>	<a href="#">PD Project</a>
PT develop	High	In Progress	70 %	Goldie Almond	10/2/2017	12/27/2017	<a href="#">BoostSolutions</a>	<a href="#">PT Project</a>

d

## 7. Troubleshooting & Support

### **Troubleshooting FAQ:**

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

### **Contact Info:**

Product & Licensing Inquires: [sales@boostsolutions.com](mailto:sales@boostsolutions.com)

Technical Support (Basic): [support@boostsolutions.com](mailto:support@boostsolutions.com)

Request a New Product or Feature: [feature\\_request@boostsolutions.com](mailto:feature_request@boostsolutions.com)

## 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: 8fa4fcbbeab9475d8b8f10d2c7b27e1e982261612  
75d49c683442a828de45bdd

Farm License  
Farm ID: {8fa4fcbbeab9-475d-8b8f-10d2c7b27e1e}  
Number of Users: 43 user(s)

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

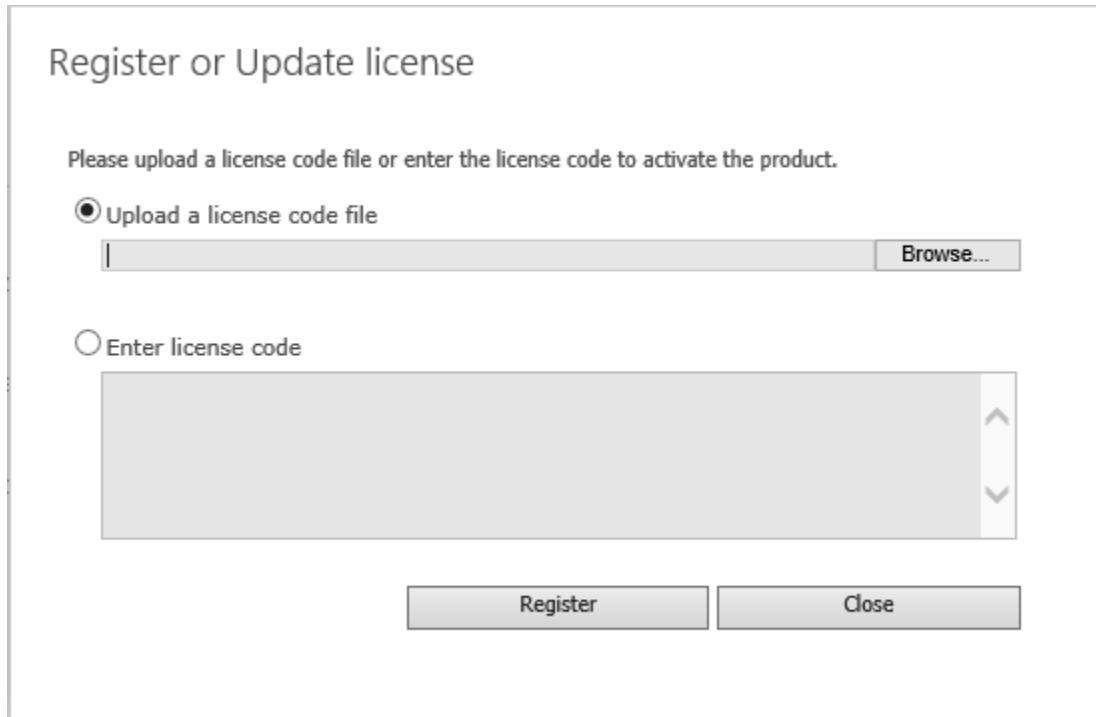
Download Close

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](mailto:sales@boostsolutions.com)) to generate a license code.

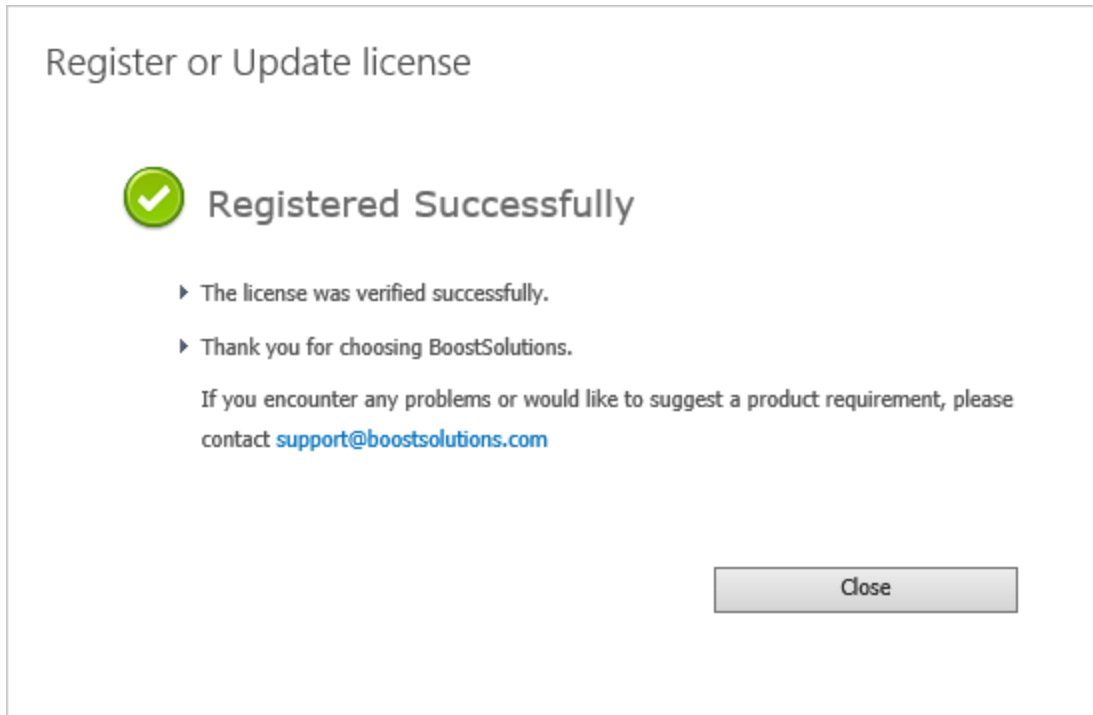
## **License Registration**

- 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](#).