



# **Calendar Rollup 3.0**

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## **User Guide**

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## 1. Introduction

BoostSolutions Calendar Rollup can aggregate calendar events from SharePoint, Exchange, Google Calendar and external content type. Calendar Rollup allows user to view, track and manage all events in one place.

This user guide will guide you to install and configure Calendar Rollup on your SharePoint.

For latest version of this copy or other user 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 Calendar Rollup 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.
Calendar Rollup_V3_User Guide.pdf	User guide for Calendar Rollup 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.
Solutions\Foundation\Install.config	A file containing the configuration information for the installer.
Solutions\Calendar\ BoostSolutions.CalendarRollupSetup14.3.wsp	A SharePoint solution package containing Calendar Rollup files and resources for SharePoint 2010 or

	SharePoint Foundation 2010.
Solutions\Calendar\ BoostSolutions.CalendarRollupSetup 15.3.wsp	A SharePoint solution package containing Calendar Rollup files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Calendar\ BoostSolutions.CalendarRollupSetup 16.3.wsp	A SharePoint solution package containing Calendar Rollup files and resources for SharePoint 2016.
Solutions\Calendar\Install.config	A file containing the configuration information for the installer.

## 2.2 Software Requirements

Before you install Calendar Rollup, ensure your system meets the following requirements:

### 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

### SharePoint 2010

Operating System	Microsoft Windows Server 2008 x64 Microsoft Windows Server 2008 R2
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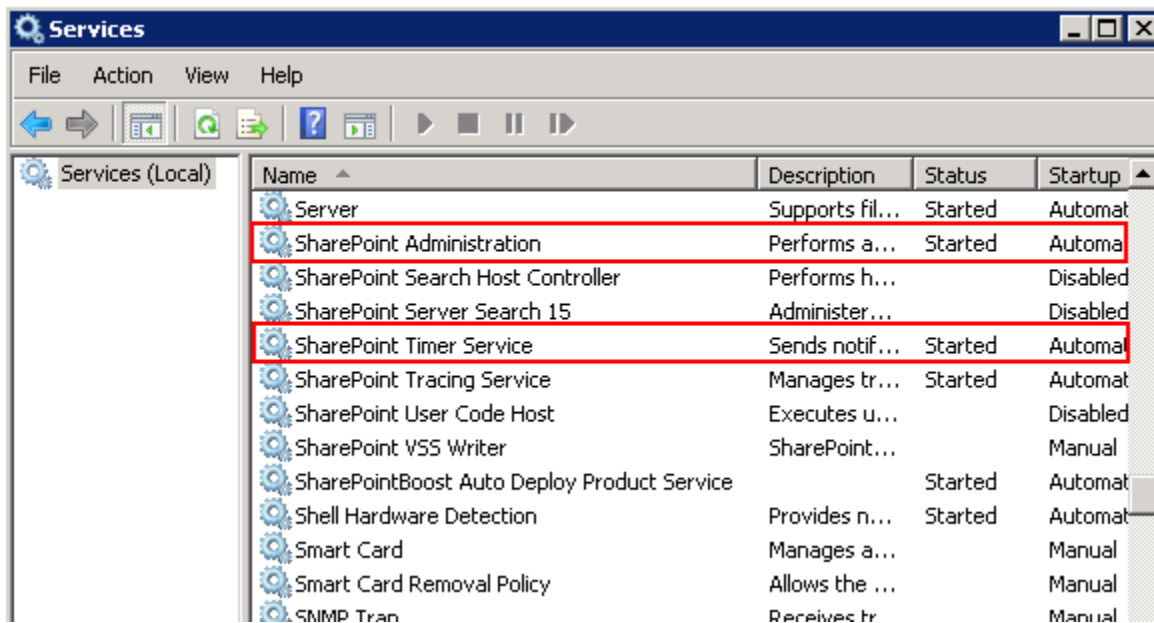
Server	Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010 Microsoft .NET Framework 3.5
Browser	Microsoft Internet Explorer 8 or above Mozilla Firefox Google Chrome

## 2.3 Installation

Follow these steps to install Calendar Rollup on your SharePoint servers.

### Installation Preconditions

Before you install this product, please ensure these services are started on your SharePoint servers: **SharePoint Administration** and **SharePoint Timer**.



Calendar Rollup 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 install this product, you must have the following specific permissions and rights.

- Member of the local server's **Administrators** group.
- Member of the **Farm Administrators** group.

### To install Calendar Rollup on SharePoint server.



- a. Download the zip file (\*.zip) of the product from the BoostSolutions website, then extract the file.
- b. Open the unzipped 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 Calendar Rollup 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 Calendar Rollup to SharePoint servers.**

If you have installed BoostSolutions products before, please skip the steps for the installation of Foundation.

- 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.

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.CalendarRollupSetup16.3.wsp
stsadm -o addsolution -filename BoostSolutions.FoundationSetup16.1.wsp
```

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

```
stsadm -o deploysolution -name BoostSolutions.CalendarRollupSetup16.3.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.CalendarRollupSetup16.3.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 SharePointBoost.Calendar -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.calendarrollupsetup16.3.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**.

### **To remove Calendar Rollup from SharePoint servers.**

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.CalendarRollupSetup16.3.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.CalendarRollupSetup16.3.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.CalendarRollupSetup16.3.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.calendarrollupsetup16.3.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.calendarrollupsetup16.3.wsp.
- i. Select “boostsolutions.calendarrollupsetup16.3.wsp”.
- j. On the Solution Properties page, click **Remove Solution**.

### **To remove BoostSolutions Foundation from SharePoint servers.**

The BoostSolutions Foundation is 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, 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.

- k. On the Central Administration Home page, click **System Settings**.
- l. In the Farm Management section, click **Manage farm solutions**.
- m. On the Solution Management page, click "boostsolutions.foundationsetup16.1.wsp".
- n. On the Solution Properties page, click **Retract Solution**.
- o. On the Retract Solution page, in the Deploy When section, select **Now**.
- p. In the Retract From section, in the A specific web application list, click All content web applications.
- q. Click **OK**.
- r. Wait a minute, and refresh the browser until you see "Not Deployed" as the status for boostsolutions.foundationsetup16.1.wsp.
- s. Select "boostsolutions.foundationsetup16.1.wsp".
- t. On the Solution Properties page, click **Remove Solution**.

## 2.7 Feature Activation

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 the **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**.


	<p>BoostSolutions Calendar Rollup 3.0.911.0</p> <p>A calendar web part that displays data from SharePoint lists/libraries, Exchange calendars, Google calendars and SharePoint External Content Type; create, edit and color-code calendars for easier management. (Powered by BoostSolutions)</p>	<input type="button" value="Deactivate"/>	<input checked="" type="button" value="Active"/>
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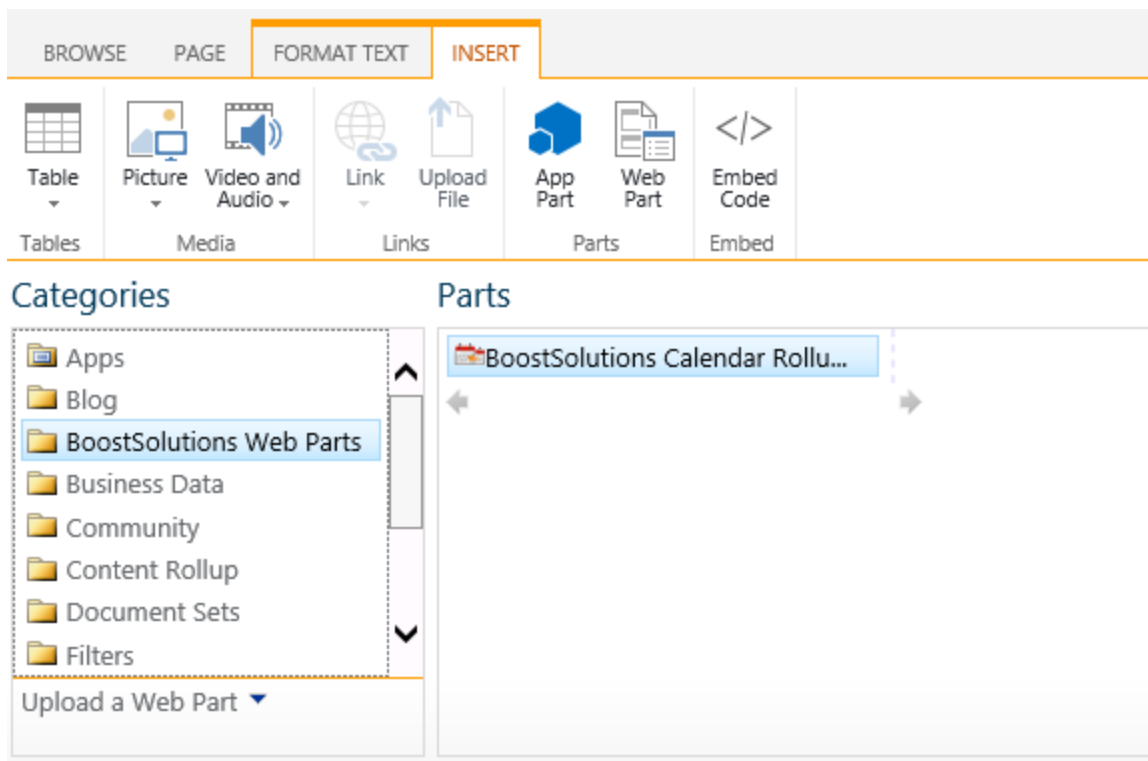
## 3. Calendar Rollup Configuration

### 3.1 Add Calendar Rollup Web Part

Before you use the Calendar Rollup Web Part to collect calendar events, the Web Part needs to be added to the page first.

To add a Web Part on the page, you must have the appropriate permissions.

- Enter a page or site which you want to add the Calendar Rollup Web Part to, click Settings  and then click **Edit Page**.
- Click on the page where you want to add the Web Part, click the **Insert** tab, and then click **Web Part**.
- Under **Categories**, select **BoostSolutions Web Parts**; then select **BoostSolutions Calendar Rollup Web Part**; lastly click **Add**.



- When you finish editing the page, click the page tab, and then click **Save & Close**.

## 3.2 Types of Calendar

Calendar Rollup can aggregate information from different data sources, including SharePoint, Google, Exchange and external data.

**SharePoint:** Get event data from a SharePoint list or library in the current site collection.

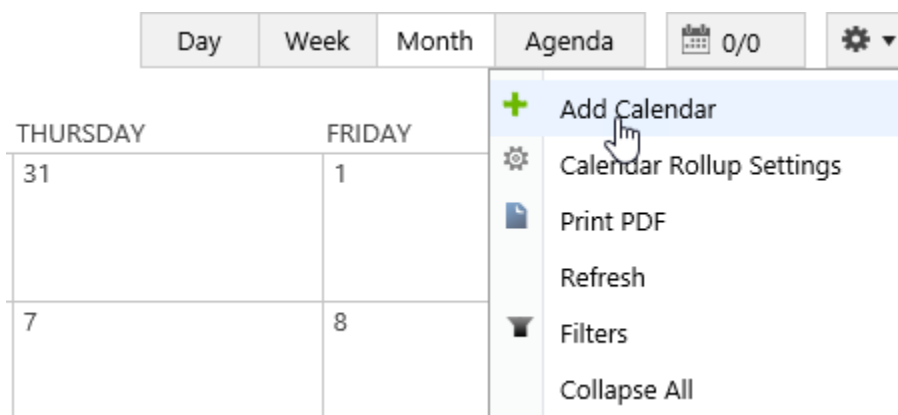
**Google Calendar:** Get events from Google calendar.

**Exchange Calendar:** Get events from an Exchange calendar, following Exchange versions are supported: Microsoft Exchange 2007SP1, 2010, 2013, 2016 and Exchange Online.

**External Content Type:** Get information from external content type.

## 3.3 Add a calendar

- On top-right corner of the BoostSolutions Calendar Rollup Web Part, click **Add Calendar** from the dropdown menu.



- Choose a calendar type (SharePoint List, Exchange Calendar, Google Calendar or External Content Type).

Choose a calendar type



### SharePoint List

Get event data from SharePoint List or Library in current site collection



### Exchange Calendar

Get event data from Exchange Calendar



### Google Calendar

Get event data from Google Calendar



### External Content Type

Get event data from External Content Type

- c. In the **Add or Change Calendar** page, you can specify the following settings: General Settings, Data source configuration, Tooltip Settings and Customize Color Scheme (available for SharePoint List).

### General Settings

#### General Settings

Enter a name for your calendar.

Calendar Name

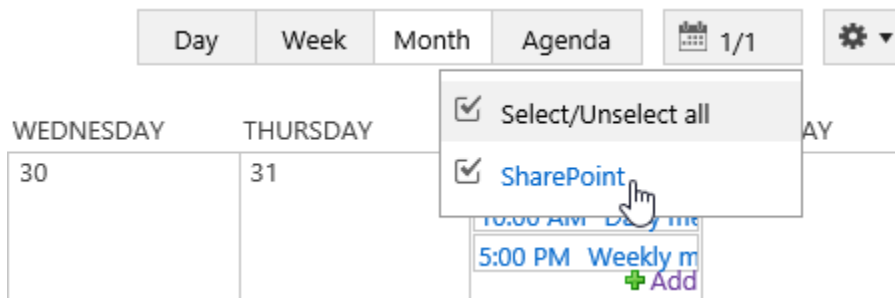
Enabled

Read Only

Specify a color for this calendar

Default color  Custom color

**Calendar Name:** Specify a name for the incoming calendar. This name will be shown on the calendar rollup Web Part as follows:



**Enabled:** Specify the status of the calendar on the Web Part. Selecting it means the calendar is active and will be shown on the Web Part; if not selected, the calendar will not be shown on the Web Part.

**Read Only:** Specify if the end users can modify calendar events. Selecting it means that end users cannot create, update or delete events on the Calendar Rollup Web Part.

**Specify a color for this calendar:** Specify a color to represent the calendar resource. If you add multiple calendars, setting different colors will help you quickly and easily to identify events.

Specify a color for this calendar

Default color  Custom color

Specify Text Color

Preview

Lorem Ipsum

Specify Background Color



MONDAY	TUESDAY	WEDNESDAY	THURSDAY
28	29	30	31
10:00 AM Daily me	10:00 AM Daily me	10:00 AM Daily me	10:00 AM Daily me
4	5	6	7
10:00 AM Daily me	10:00 AM Daily me	10:00 AM Daily me	10:00 AM Daily me
6:00 PM Anna's bi			

### Data Source Configuration

You can configure the incoming calendar in this section; settings may vary for different calendar types.

#### SharePoint list

- a. In the **Add Calendar** page, select the **SharePoint List** option.
- b. In the **Add or Change a Calendar** page, specify the Data source configuration settings.

##### Data source configuration

Specify a SharePoint list to use as the data source for your calendar.

Source Site

-Testing

Source List

Calendar

Source List View

Calendar

Select columns to map calendar event

Title: Title

Start Time: Start Time

End Time: End Time

All Day Event: All Day Event

- **Source Site:** Select the site which the list or calendar belongs to.
- **Source List:** Select a SharePoint list or calendar.
- **Source List View:** Select one view; the items in that view will be added on the Web Part.
- **Select columns to map calendar event:** Map the list or calendar columns to the indicated fields.

#### Google calendar

Google now uses OAuth 2.0 for server-to-server interactions, in this scenario you specify a service account in Calendar Rollup to call Google API. Once you configure a service account and setup the connection, Calendar Rollup will retrieve calendar data from google on behalf of the service account.

To create a service account, please refer to

<https://developers.google.com/accounts/docs/OAuth2ServiceAccount>.

Before configuration, there are some tips you need to know:

- Your Gmail address must be a business email address;
- You need to delegate domain-wide authority to the service account;
- Ensure that Calendar API is enable.

## Enabled APIs

Some APIs are enabled automatically. You can disable them if you're not using their services.

NAME ^	QUOTA	STATUS
BigQuery API	0%	ON
Calendar API	0%	ON
Debuglet Controller API	0%	ON
Google Cloud SQL		ON

Follow these steps to setup a connection to Google Calendar.

- In the **Add Calendar** page, select the **Google Calendar** option.
- In the **Add or Change a Calendar** page, specify the Data source configuration settings.

## Data source configuration

Specify a Google calendar to use as the data source for your calendar.

## Google Account

Service Account Email Address:

User Account Email Address:

Private Key (P12):

CalendarRollup161012-e8cc6856ab78.p12 [Delete](#)

Successful

## Available Calendar

Here you need to specify a service account email address, user account email address and a private key. (A service account and private key is created or generated in Google Developer Console)

- Service Account Email Address:** enter your Google service account email address, which can be found Google Developers Console -> Projects -> APIs&auth -> Credentials.

## OAuth

OAuth 2.0 allows users to share specific data with you (for example, contact lists) while keeping their usernames, passwords, and other information private.

[Learn more](#)

## Service Account

CLIENT ID	198059473176- engsdstcf3m97jri1t079cv8uebaal83.apps.googleusercontent.com
EMAIL ADDRESS	198059473176- engsdstcf3m97jri1t079cv8uebaal83@developer.gserviceaccount.com
CERTIFICATE FINGERPRINTS	5fc0cea2b5942310e2c6ea79c32e3ed5a4a9235d - <a href="#">Delete</a> e5253224ddb4dd154172065d848cb7d090dc2c38 - <a href="#">Delete</a> 77609ceaaee9eed441143aa5c768a6fc03ba55116 - <a href="#">Delete</a> 255c14da32e076cc4c9057a347c65c4bafcd4599 - <a href="#">Delete</a> 94ea0809c92410db4b56bf082a1539b3d898be2b - <a href="#">Delete</a>

- User Account Email Address:** enter your google email address.
- Private Key:** a private key is generated in the Google Developer Console -> APIs&auth -> Credentials. Click **Generate new P12 key** button to generate a private key, and then upload in Calendar Rollup.
- Test Connection:** validate the connection.
- Available Calendar:** once the connection is successful, select a Google calendar.

## Exchange Calendar

- In the **Add Calendar** page, select the **Exchange Calendar** option.
- In the **Add or Change a Calendar** page, specify the Data source configuration settings.

### Data source configuration

Specify an Exchange calendar to use as the data source for your calendar.

#### Exchange Version



#### Exchange Web Service URL

Example: <https://exchange.company.com/ews/exchange.asmx>

#### Enter user name and password

User Name:

Password:

Calendar Rollup can work with the following exchange versions: Exchange 2007 SP1, Exchange 2010, Exchange 2010 SP1, Exchange 2010 SP2, Exchange 2013, Exchange 2016 and Exchange Online.

- In the **Exchange Version** drop-down list, select one version.
- Enter the URL in the **Exchange Web Service URL** box.
- Enter user name and password:** Use the specified account information to retrieve calendar events from Exchange.
- Click the **Test Connection** button to validate the connection.

## External Content Type

- In **Add Calendar** page, and select the **External Content Type** option.
- In the **Add or Change a Calendar** page, specify the Data source configuration settings.

Data source configuration  
Specify an External Content Type to use as the data source for your calendar.

External Content Type



Identifier

Select columns to map calendar event

Title:

Start Time:

End Time:

All Day Event:

- Click the icon to check if there is an external data configured in site.
- Click the icon to open an **External Content Type Picker** dialog, and select one external content type.
- Specify a column as identifier.
- Map the external data columns to the indicated fields.

**Tooltip Settings**

Select columns to display an events tooltips on calendar view.

28	29	30	31	1
10:00 AM Daily meeting	10:00 AM Daily meeting	10:00 AM Daily meeting	10:00 AM Daily meeting	10:00 AM Daily meeting
4	5			
10:00 AM Daily meeting	10:00 AM Daily meeting			
6:00 PM Anna's birthday				
11	12			
10:00 AM Daily meeting				
18	19			
10:00 AM Daily meeting	10:00 AM Daily meeting			
25	26			
10:00 AM Daily meeting	10:00 AM Daily meeting	10:00 AM Daily meeting	10:00 AM Daily meeting	10:00 AM Daily meeting

Daily meeting

x

Title: Daily meeting

Location: MR-1

Start Time: 10/6/2017 10:00 AM

End Time: 10/6/2017 10:15 AM

Attendees:

[Edit Event](#) | [Delete Event](#)

**Tooltip Settings**  
Specify columns to use as tooltips for your event on the calendar view.

**Specify columns for calendar item tooltip**

**Available Columns**

- Attachments
- Description
- All Day Event
- Recurrence
- Category
- Resources

Add >

< Remove

**Display Columns**

- Title
- Location
- Start Time
- End Time
- Attendees

Move Up

Move Down

**Add**

In the **Available Columns** box, select a column and click the **Add >** button. Continue until you have added all the columns you would like to use.

**Remove**

In the **Display Columns** box, select a column and click the **< Remove** button. Continue until you have removed all the columns you would like to remove.

**Change column position**

In the **Display Columns** box, select a column and click the **Move Up** or **Move Down** button to change a columns position.

**Customize Color Scheme**

This function enables you to define different colors based on an events category; this feature is only available for SharePoint list.

Once you setup the color scheme, the color will be applied to the day, week and month view.

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
27	28 <span style="color: blue;">10:00 AM Daily mee</span>	29 <span style="color: blue;">10:00 AM Daily mee</span>	30 <span style="color: blue;">10:00 AM Daily mee</span>	31 <span style="color: blue;">10:00 AM Daily mee</span>
3	4 <span style="color: blue;">10:00 AM Daily mee</span> <span style="color: red;">6:00 PM Anna's birt</span>	5 <span style="color: blue;">10:00 AM Daily mee</span>	6 <span style="color: blue;">10:00 AM Daily mee</span>	7 <span style="color: blue;">10:00 AM Daily mee</span>
10	11 <span style="color: blue;">10:00 AM Daily mee</span>	12 <span style="color: blue;">10:00 AM Daily mee</span>	13 <span style="color: blue;">10:00 AM Daily mee</span> <span style="color: green;">6:00 PM Company</span>	14 <span style="color: blue;">10:00 AM Daily mee</span>

Column Name	Operator	Value	Background Color	Text Color	
Category	Is equal to	Anniversa			Add color scheme
Column/Values					
"Category Is equal to Birthday"		Lorem Ipsum		Delete	
"Category Is equal to Anniversary"		Lorem Ipsum		Delete	

### Adding a color scheme

- In the **Column Name** drop-down menu, select one column (Such as Category).
- In the **Operator** drop-down menu, select one operator.
- In the **Value** drop-down list, select one value.
- Specify a color for the background.
- Specify a color for the text.
- Click the **Add color scheme** button to add the color scheme.

### Delete a color scheme

Select a color scheme and click **Delete**.

### Additional Information

This function allows you to specify whether additional information(Location and Organizer) appears on the event bar; this feature is only available for Exchange Calendar.

<p><b>Additional Information</b></p> <p>Specify whether additional information appears on the event bar.                  Note: these information will also appear in the event tooltip.</p>	<p><b>Which information you want to display on the event bar?</b></p> <p><input checked="" type="checkbox"/> Location</p> <p><input checked="" type="checkbox"/> Organizer</p>
--	--

If you select **Location** and **Organizer**, you will see the information for the two fields on the event bar.

4	5	6
10:00 AM Daily meeting	10:00 AM Support meeting;Meeting Room	10:00 AM Daily meet
6:00 PM Anna's birthday	10:00 AM Daily meeting	

### Event Permission

In this section, you can specify who can add, edit or delete event items on Calendar Rollup Web Part.

**SharePoint default:** Maintain the same permission settings with SharePoint.

**Only specified users/groups:** only the specified users or groups (SharePoint groups/AD groups) can manipulate events.

Event Permission

Specify who can add, edit or delete event items.

Specify users who can add event items

- SharePoint default
- Only specified users/groups

Team members

Specify users who can edit event items.

- SharePoint default
- Only specified users/groups

Team members

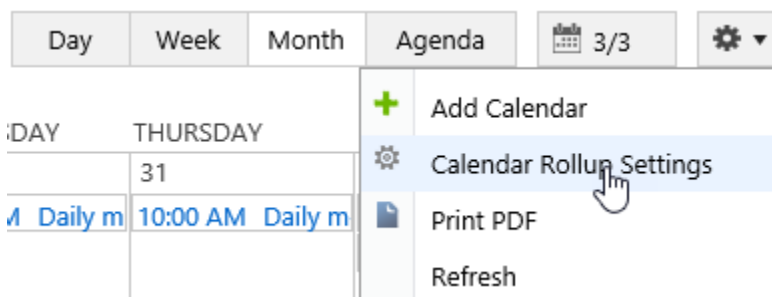
Specify users who can delete event items.

- SharePoint default
- Only specified users/groups

Team leader

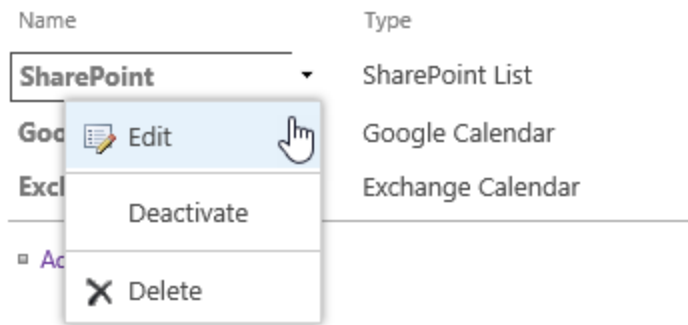
### 3.4 Edit a Calendar

- a. Click **Calendar Rollup Settings** from the dropdown menu.



- b. In the **Calendar Rollup Settings** page, select one calendar in the **Calendars** section. Then click the **Edit** command from the context menu.



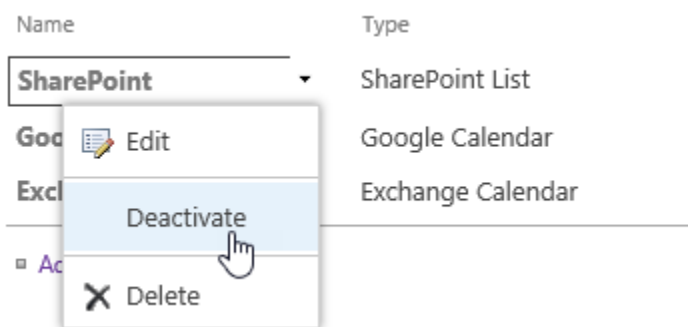


- c. In the **Add or Change Calendar** page, modify the settings, and click OK.

### 3.5 Activate/Deactivate a Calendar

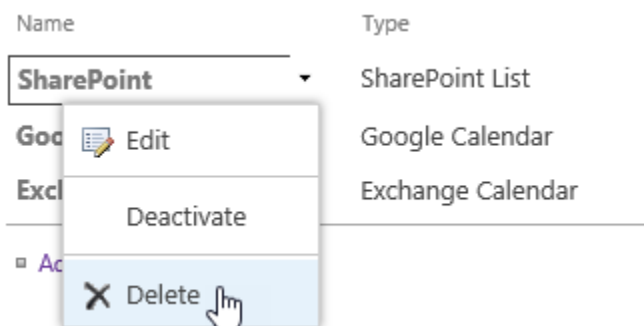
You can determine if the events of a calendar are shown on the Web Part by specifying its status.

- a. Enter the **Calendar Rollup Settings** page and select one calendar in the **Calendars** section.
- b. Click the **Activate** or **Deactivate** command from the context menu.



### 3.6 Delete a Calendar

- a. Enter the **Calendar Rollup Settings** page and select one calendar in the **Calendars** section.
- b. Click the **Delete** command from the context menu.



Alternatively, you can enter the **Add or Change Calendar** page, and click the **Delete** button.

## 3.7 Basic Settings for Calendar Rollup

### Basic Settings

Default View:

Month 

- Show calendar selector
- Show print button
- Show tooltip for event bar
- Expand All

Default Agenda View:

Monthly

Weekly

[Customize Agenda View Columns](#)

Auto Refresh:

Auto Refresh Segment Time:  minutes

- **Default view:** Specify the default view, by month, week or day. You can also select Agenda and show all current month events grouped by day.
- **Show calendar selector:** Allows users to choose which calendars will be displayed.
- **Show print button:** Show the print command in the Calendar Rollup menu.
- **Show tooltip for event bar:** Display a tooltip when the mouse hovers over an event.
- **Expand All:** Expand all calendar events by default.
- **Default Agenda View:** Specify the default display style for agenda view, **Monthly** or **Weekly**. When you select **Monthly**, all the events in the current month will be displayed in agenda view; or if you select **Weekly**, all the events in the current week will be displayed in agenda view.
- **Customize Agenda View Columns:** Specify which columns display in agenda view.

To add more columns in agenda view:

- a. In the Basic Settings page, click the **Customize Agenda View Columns** button.
- b. In the Customize Agenda View Columns window, select the checkboxes next to the column names.

### Customize Agenda View Columns ✕

Select	Column Name	Display Name
<input checked="" type="checkbox"/>	Date	<input type="text" value="Date"/>
<input checked="" type="checkbox"/>	Duration	<input type="text" value="Duration"/>
<input checked="" type="checkbox"/>	Title	<input type="text" value="Title"/>
<input checked="" type="checkbox"/>	Location	<input type="text" value="Location"/>
<input checked="" type="checkbox"/>	Attendees	<input type="text" value="Attendees"/>

The columns: Calendar Time, Duration and Title are provided by default. You can get additional columns by adding more **Display Columns** in the **Tooltip Settings** section when add or edit calendar sources.

- c. Click **Save**.
- **Auto refresh:** Automatically update calendar data according to a specified schedule.

### 3.8 Permission Settings for Calendar Rollup

This function enables you to specify who can edit the calendar.

**Permission Settings**

Specify which users have permission to access the following functions on this Web Part:

- Add Calendar
- Calendar Rollup Settings
- License Management

Select users who are allowed to access functions on this web part:

SharePoint Default

Only selected users/groups

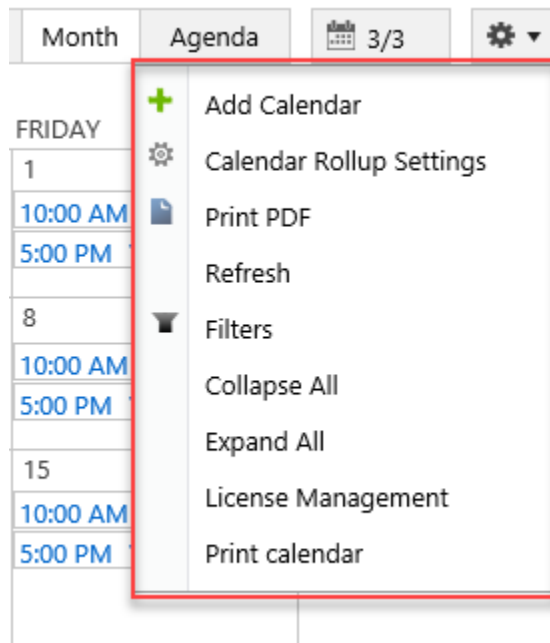
- **SharePoint Default:** Maintain the same permission settings with SharePoint.
- **Only selected users/groups:** Only selected users can edit events on the Calendar Rollup Web Part.

## 4. Using Your Calendar

Once calendars are added to your Web Part, user can view all events in one place. Calendar Rollup provides many options to help users easily use calendars.

### 4.1 Menu

You can find the menu on the top-right corner of the Calendar Rollup Web Part, options for Calendar Rollup can be found in the menu.



### 4.2 Add/Edit/Delete Event

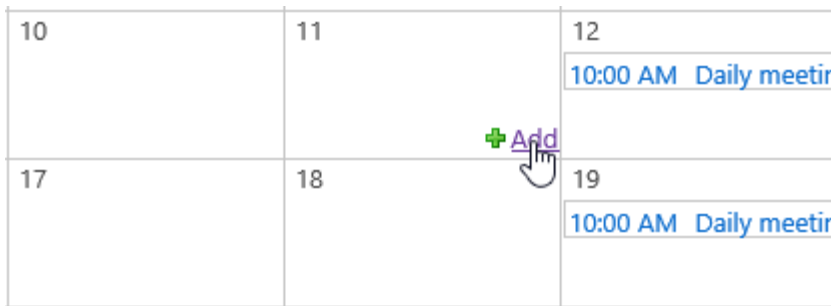
To add, edit or delete an event, you need to have permissions on the source calendar. Ensure that the general settings for calendar is not set as read only.

Users can create, edit and delete event in Month, Week and Day view, but cannot manage event in Agenda view.

#### Add an event

- a. Navigate to the Calendar Rollup web part.

- b. Click **Add** at the bottom of the calendar or double click on a date.



- c. An add an event dialog appears in the "Quick Add" mode, including Title, Calendar, Start, End and All day event.

**Add an event** [Close]

Title:

Calendar:  [v]

Start:  [Calendar icon]  [v]  [v]

End:  [Calendar icon]  [v]  [v]

All day event

[More options](#)

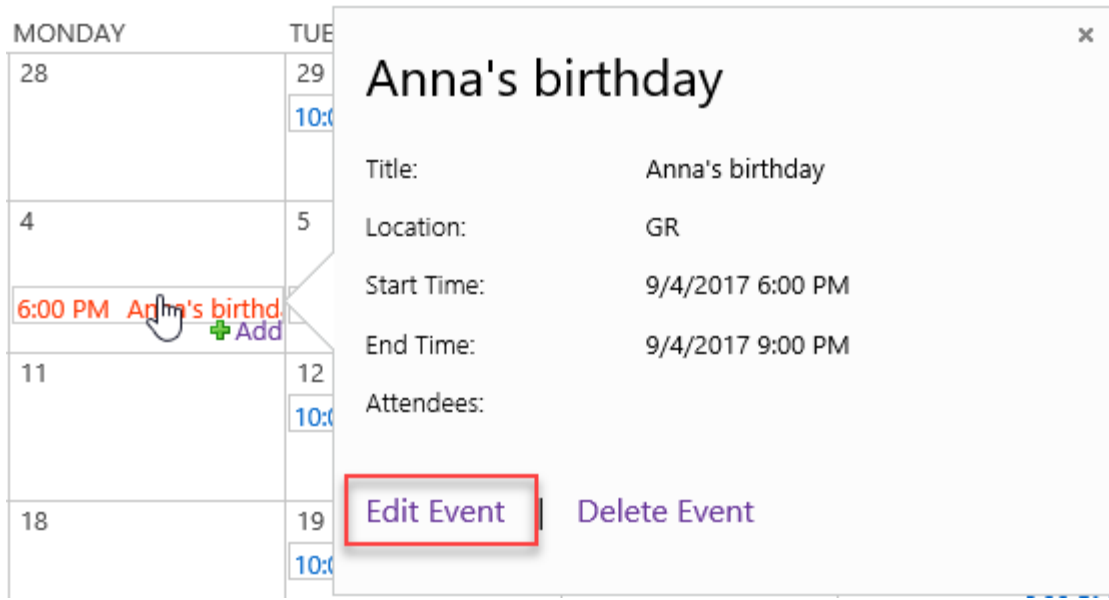
Calendar: you can add this event to a specified calendar source by selecting one in the drop-down list.

To fill-in more fields, click the **More options** link.

- d. After entering the details for this new event, click **Create**.

### Edit an event

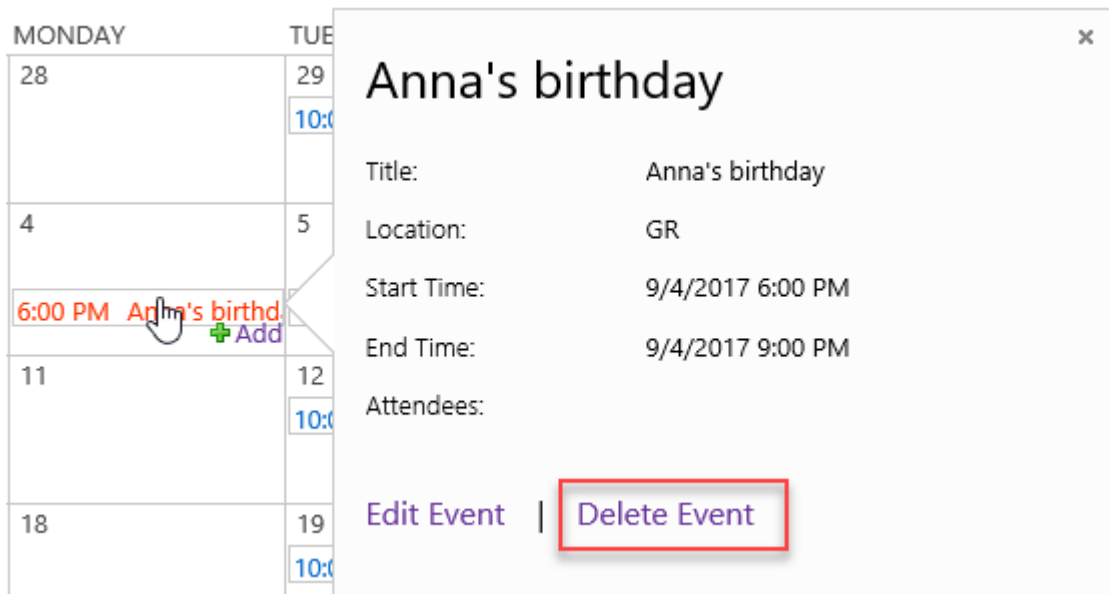
- Navigate to the Calendar Rollup web part.
- Select one event and click Edit Event in the tooltip.



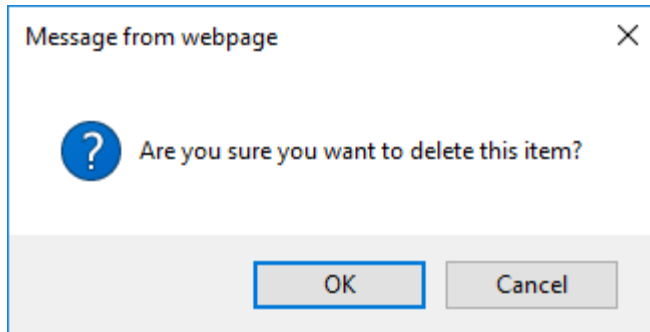
- c. Edit the details for this event and click **Save**.

### Delete an event

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



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



### 4.3 Drag an Event

Calendar Rollup allows you to move events between days, weeks and months by dragging the event.

- a. Navigate to the Calendar Rollup web part.
- b. Select one event and drag it to the specified date.



### 4.4 Agenda view

An agenda view shows all events grouped by day. All events in the current month will be shown in agenda view.

To display the Agenda view, click the **Agenda** button on the top of the Web Part.

In this view, it is not allow users to create, update or delete events.

View:  Monthly  Weekly

Date	Duration	Title	Location
9/1/2017	5:00 PM - 6:00 PM	Weekly meeting	
9/4/2017	6:00 PM - 9:00 PM	Anna's birthday	GR
9/5/2017	1:00 PM - 3:00 PM	Sales meeting	MR
9/6/2017	9:00 AM - 11:00 AM	Product release meeting	MR
9/8/2017	5:00 PM - 6:00 PM	Weekly meeting	
9/12/2017	9:00 AM - 10:00 AM	website discussion	
	3:00 PM - 5:00 PM	Remote meeting	
9/13/2017	6:00 PM - 11:55 PM	Company anniversary	GR
9/15/2017	5:00 PM - 6:00 PM	Weekly meeting	
9/22/2017	5:00 PM - 6:00 PM	Weekly meeting	
9/29/2017	5:00 PM - 6:00 PM	Weekly meeting	

You can view events by month or week by selecting the **Monthly** or **Weekly** option.

To change columns in the Agenda view, go to the **Add or Change Calendar** page and select columns in the **Tooltip Settings** section.

**Tooltip Settings**

Specify columns to use as tooltips for your event on the calendar view.

**Specify columns for calendar item tooltip**

Available Columns

- Attachments
- Description
- All Day Event
- Recurrence
- Category
- Resources

Add >

< Remove

Display Columns

- Title
- Location
- Start Time
- End Time
- Attendees

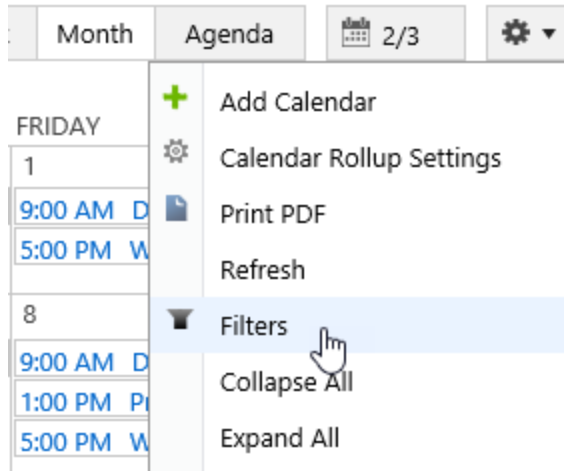
## 4.5 Filter Events

A filter option is provided to find exact events in Calendar Rollup.

### Setup a filter

- a. Click **Filters** in the Calendar Rollup menu to open an **Setup filter** dialog.





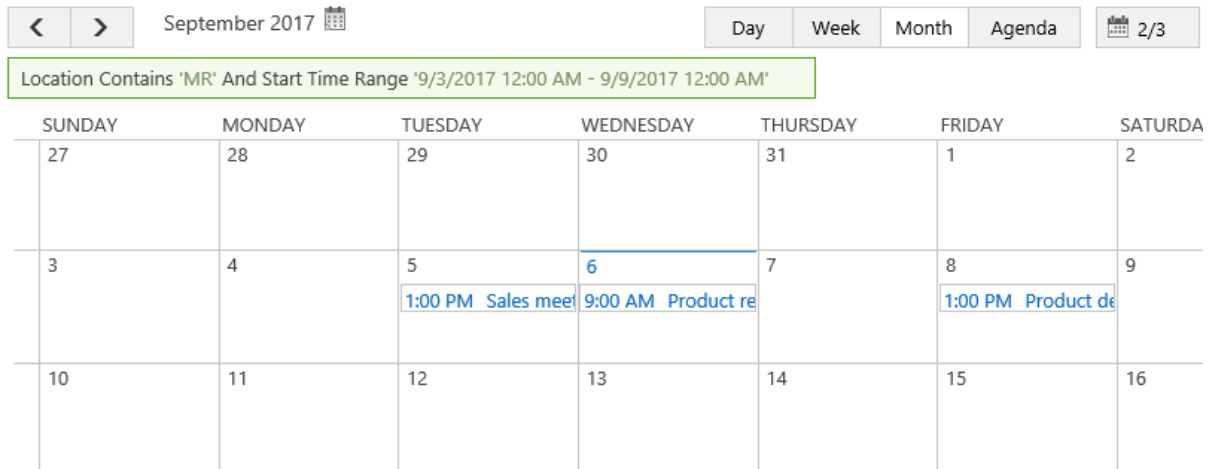
- b. In the **Filter** section, specify a filter criteria.

 A screenshot of the 'Setup filter' dialog box. The dialog has a title bar with a close button (X). It contains two filter conditions:
 


- Condition 1: 'Location(Text)' dropdown, 'Contains' operator dropdown, and 'MR' value input field with a clear (X) button.
- Condition 2: 'And' logical operator dropdown, 'Start Time(DateTime)' dropdown, 'Range' operator dropdown, and '9/3/2017 12:00 AM - 9/9/2017 12:00 AM' value input field with clear (X) and minus (+) buttons.

 At the bottom, there is a checkbox labeled 'Display Filter settings in Calendar' which is checked. There are 'Apply' and 'Cancel' buttons at the bottom right.

- Select one column in the **Select a Column** dropdown list.
  - Select one operator from the **Condition** dropdown list, and specify a value.
- c. Click the **Add** button.
- d. In the Current Filter section, specify one logical operator **And** or **Or**.
- e. To show the filter conditions on the calendar, select **Display Filter settings in Calendar**.
- f. Click **Apply**.
- g. The filtered events will be shown in the current calendar view.



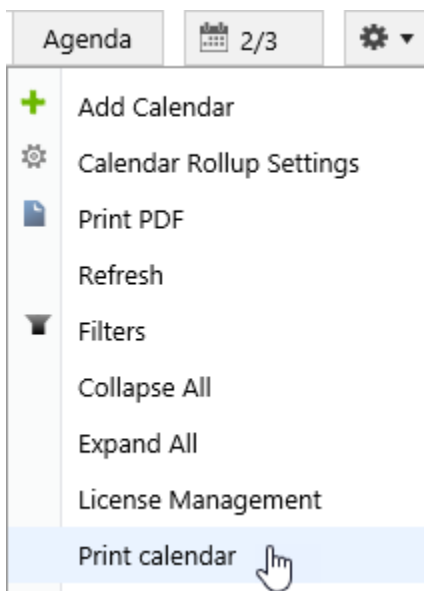
**Delete/Clear filter**

- a. Click **Filters** in the Calendar Rollup menu to open an **Setup filter** dialog.
- b. In the **Current Filter** section, click  to delete the criteria.
- c. Click **Apply**.

**4.6 Print Calendar**

Calendar Rollup enables users to quickly and easily print calendars.

- a. Select a view which you want to print.
- b. In the Calendar Rollup menu, click **Print calendar**.

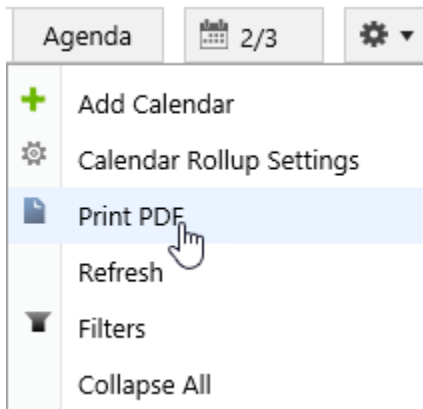


- c. In the **Print** dialog, select the print options you want and then click **Print**.

## 4.7 Save as PDF

Calendar rollup allows users to save the view as a PDF file.

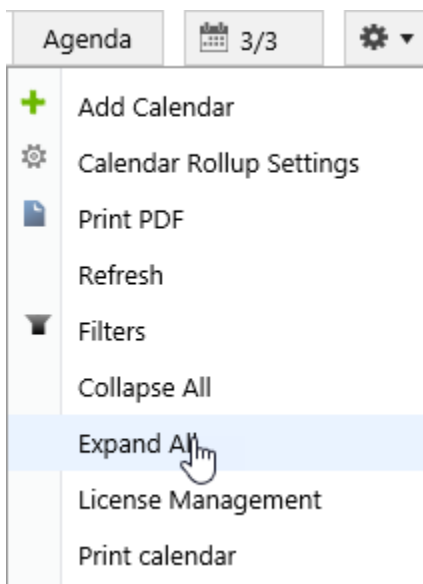
- Select a view which you want to export to PDF.
- Click **Print PDF** from the calendar Rollup menu.



- To view the calendar in PDF, click **Open**.
- To save the PDF file, click **Save**.

## 4.8 Expand All/Collapse All Events

The default month view on the Web Part will only display 3 events per day. If you have more than 3 events in a day, you can click **Expand All** in the calendar menu.



To collapse all events in the calendar view, you can click **Collapse All** in the calendar menu.

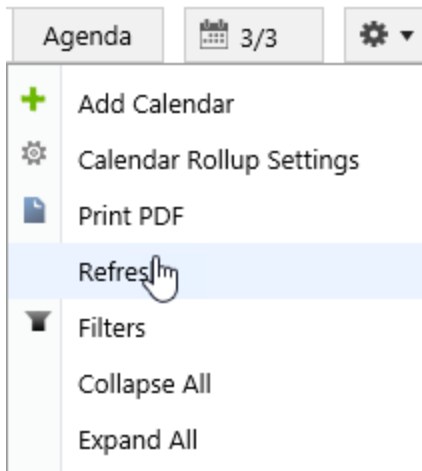
## 4.9 Change view

When users access Calendar Rollup, they will see the default view first. To switch to other views, just click Day, Week, Month or Agenda at the top of the calendar.



## 4.10 Refresh Calendar

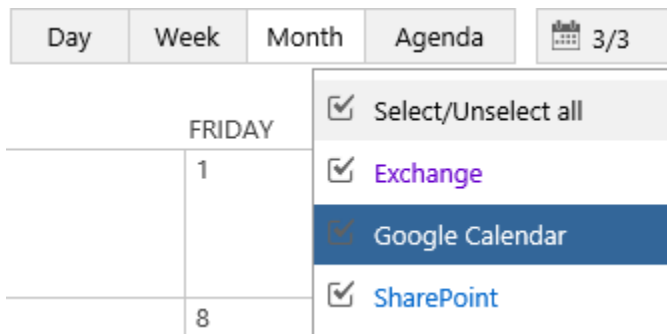
To update the calendar events on the web part, you can click Refresh in the Calendar Rollup menu.



Calendar Rollup also provides an auto refreshing function to keep events up-to-date, for details refer to [Basic Settings](#).

## 4.11 Select Calendar Source

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



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

A deactivated calendar will not be shown in the calendar selector.

## 5. Troubleshooting & Support

### **Troubleshooting FAQ:**

<http://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)

### **Live chat:**

<http://www.boostsolutions.com/support/chat/livezilla.php?intgroup=U3VwcG9ydA==&reset=true>

## Appendix A: License Management

You can use Calendar Rollup without entering any license codes 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. Click **License Management** in the Calendar Rollup menu to enter the License Management Center page.
- b. Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).

Download License Information X

Download the license type information and send to [sales@boostsolutions.com](mailto:sales@boostsolutions.com) to get license.

**Choose a license type**

Server License  
Server Code: 8fa4fcbeab9475d8b8f10d2c7b27e1e98226161275d49c683442a828de45bdd

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

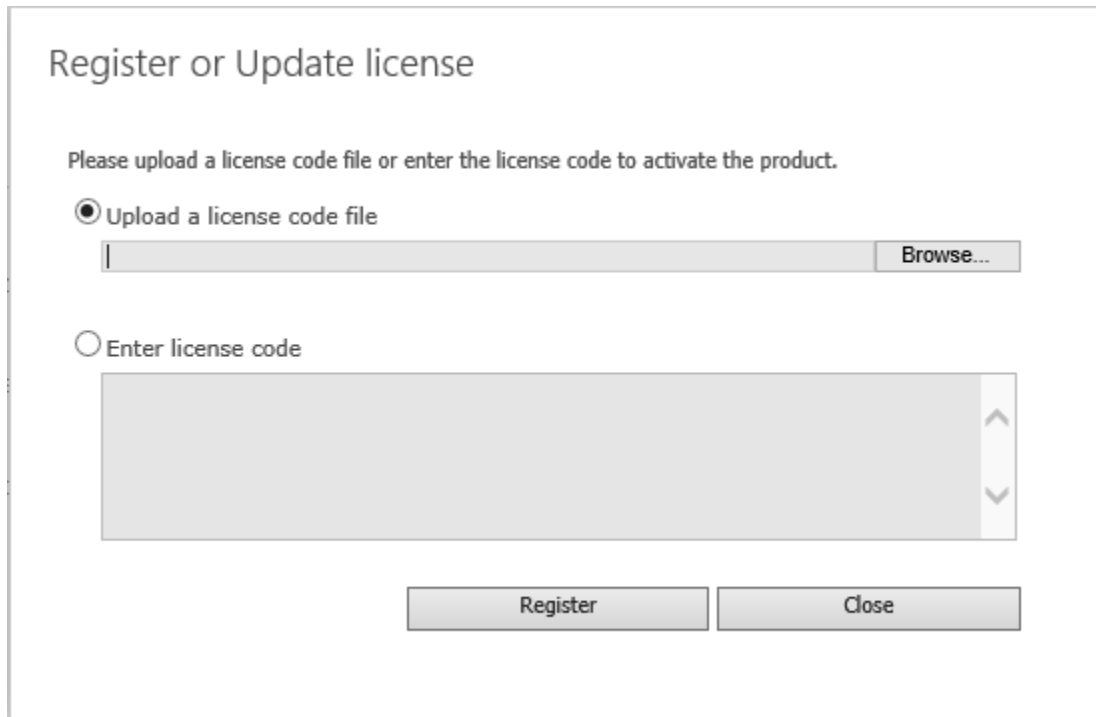
Site Collection License  
Site Collection ID: Select a site collection  
Site Collection:

In order for BoostSolutions to create a license for you, you need to 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". Below the title is the instruction: "Please upload a license code file or enter the license code to activate the product." There are two radio button options: "Upload a license code file" (which is selected) and "Enter license code". The "Upload a license code file" option has a text input field followed by a "Browse..." button. The "Enter license code" option has a large text area with a vertical scrollbar on the right side. At the bottom of the dialog box 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.



## Register or Update license

 **Registered Successfully**

- ▶ The license was verified successfully.
- ▶ Thank you for choosing BoostSolutions.

If you encounter any problems or would like to suggest a product requirement, please contact [support@boostsolutions.com](mailto:support@boostsolutions.com)

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