

SharePoint List Collection Installation Instruction

System Requirements

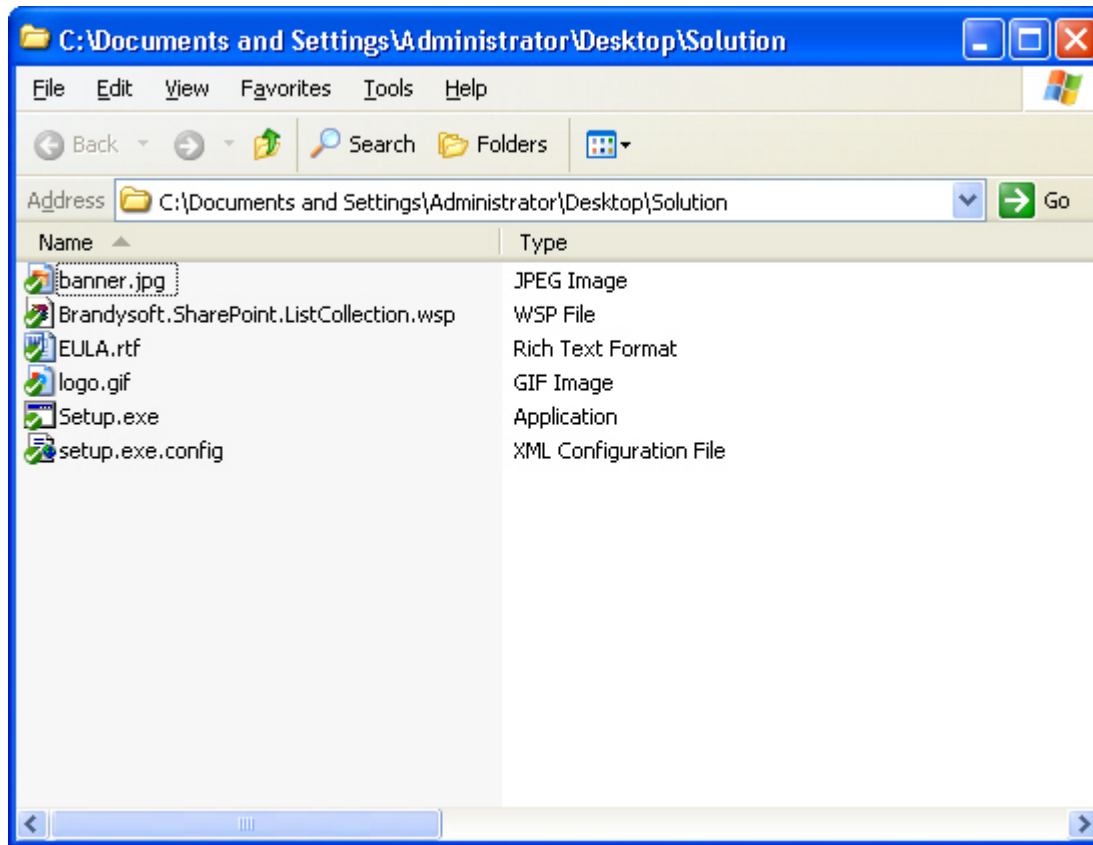
Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007.

Installation

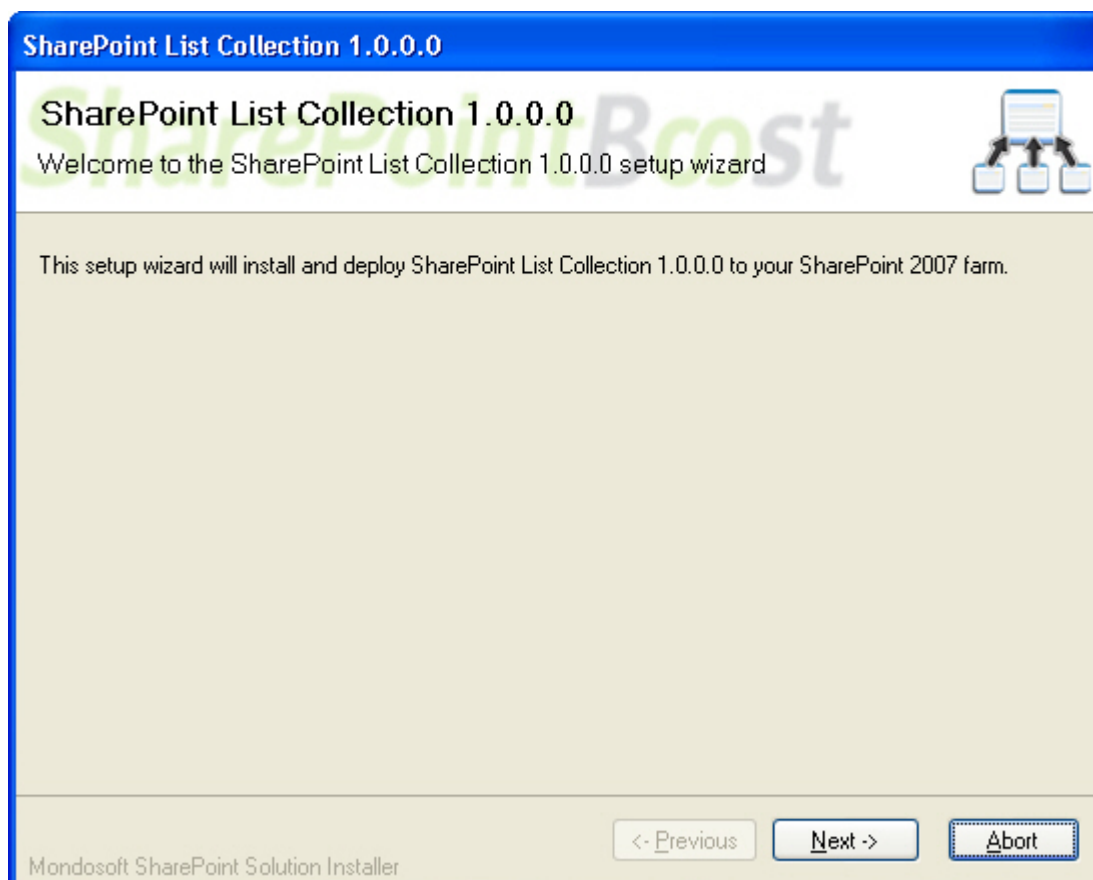
Download SharePoint List Collection setup file from SharePointBoost website, release file to a folder, and run "setup.exe".

Note

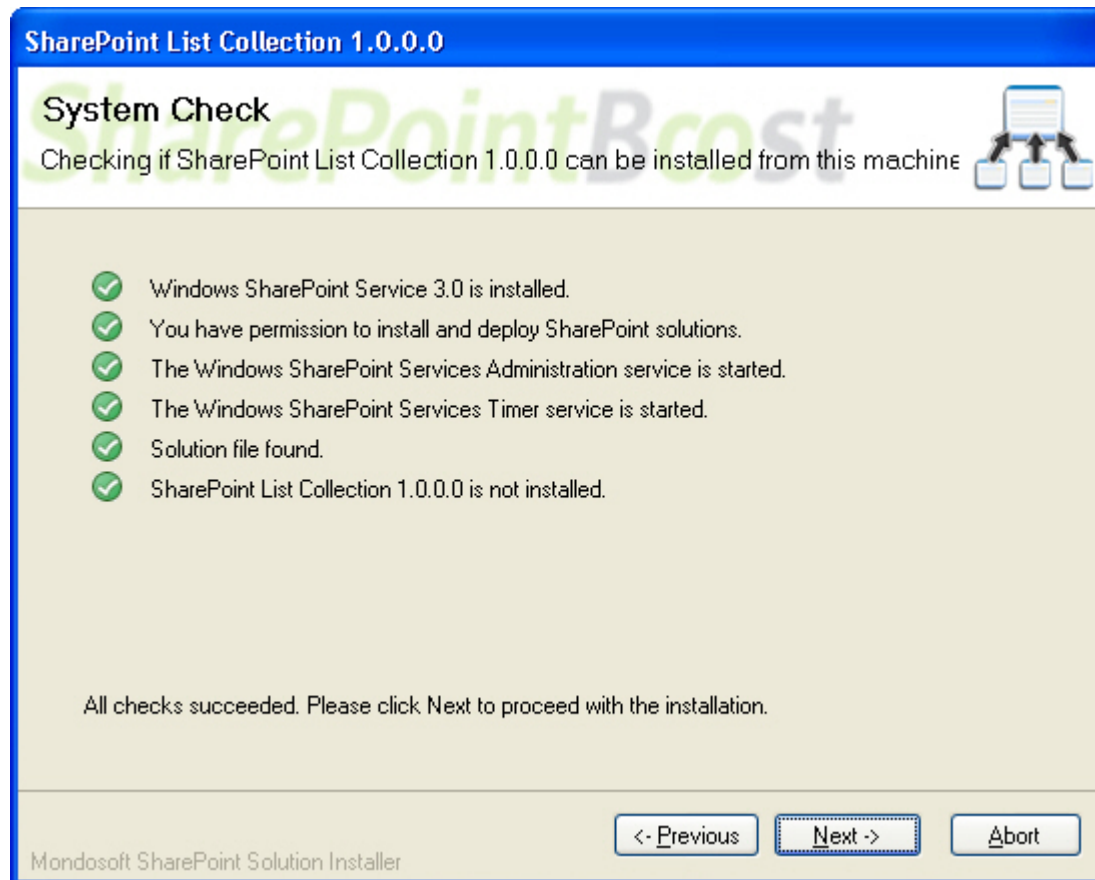
You must be the SharePoint Farm Administrator.



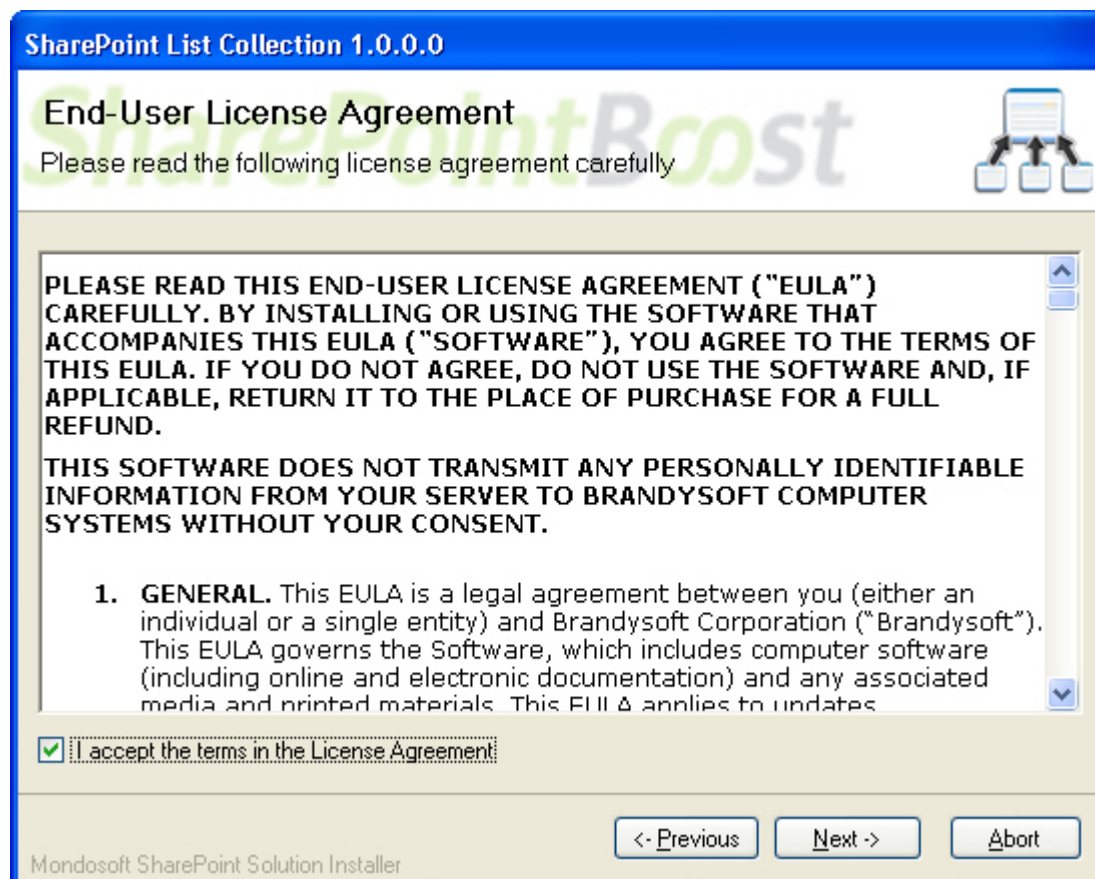
Click "Next".



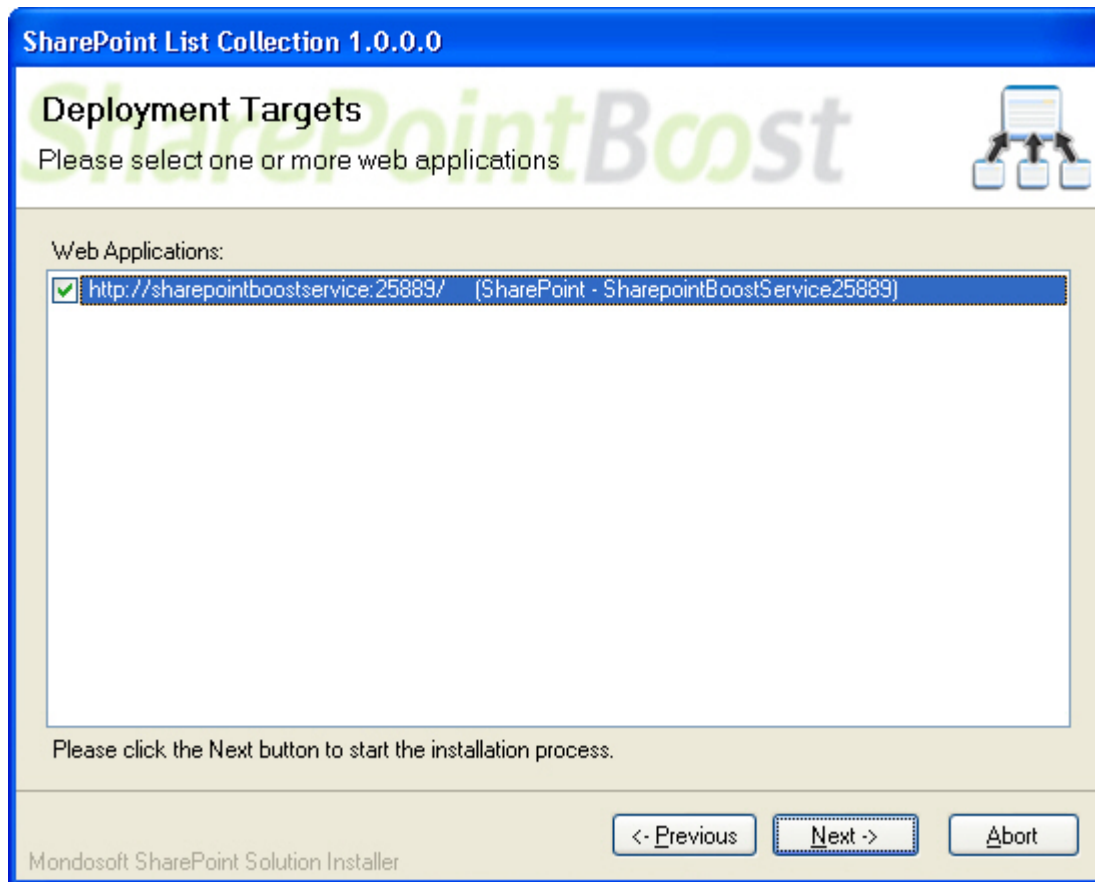
Wait for a few seconds to check system and click “Next”.



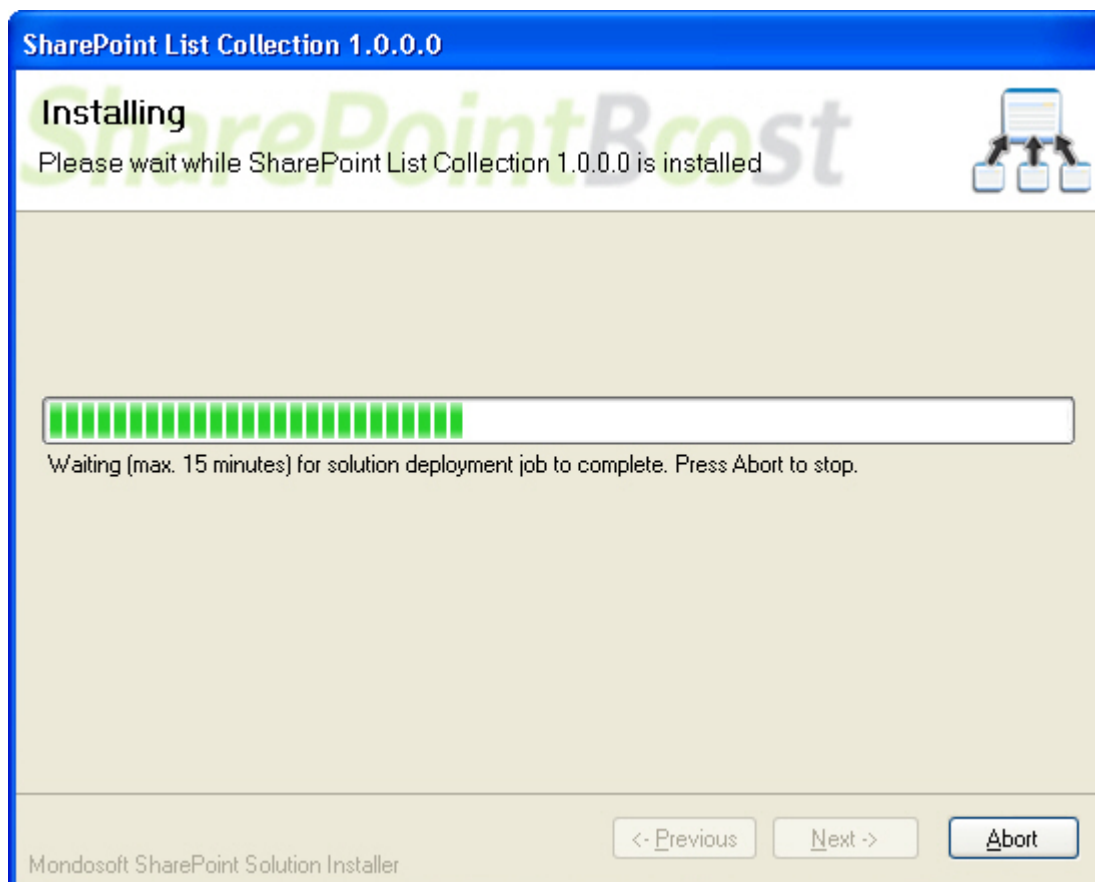
After reading License Agreement, click “Next”.



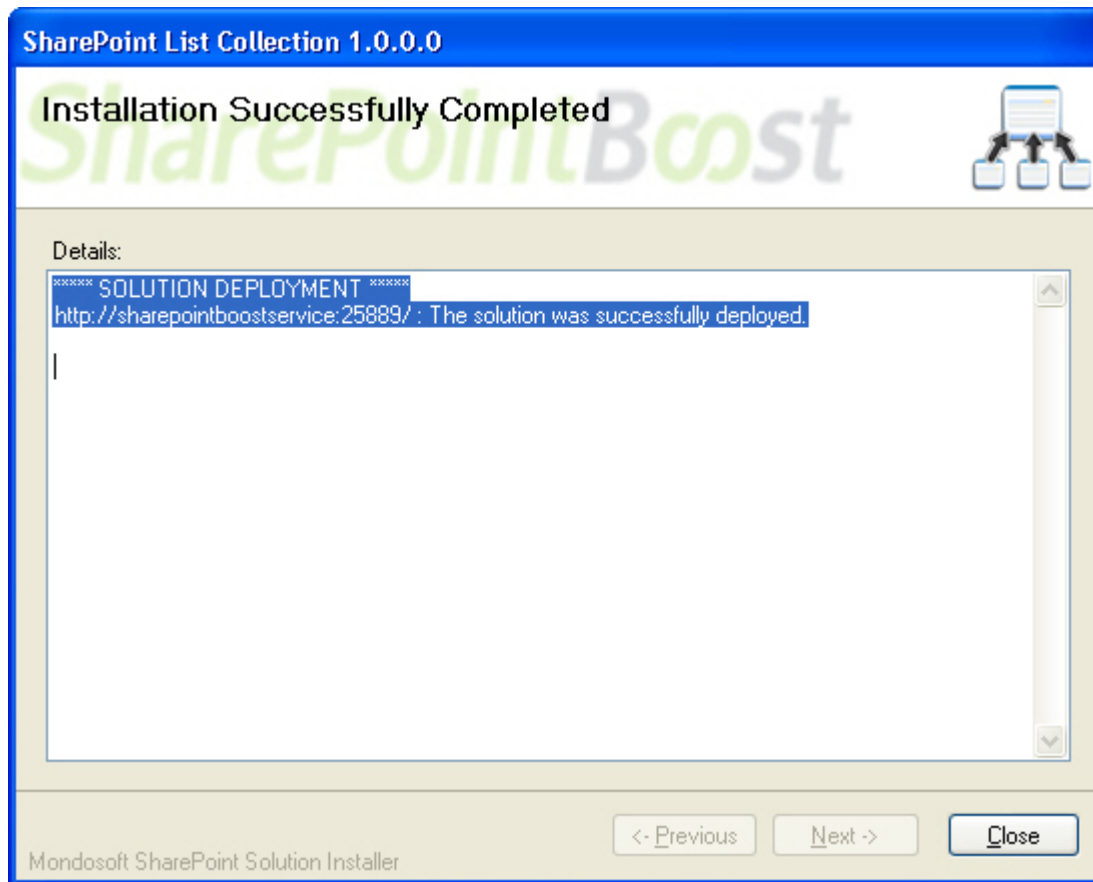
Select one or more web application and click “Next”.



Wait for installation, click “Next” for more deployment details.



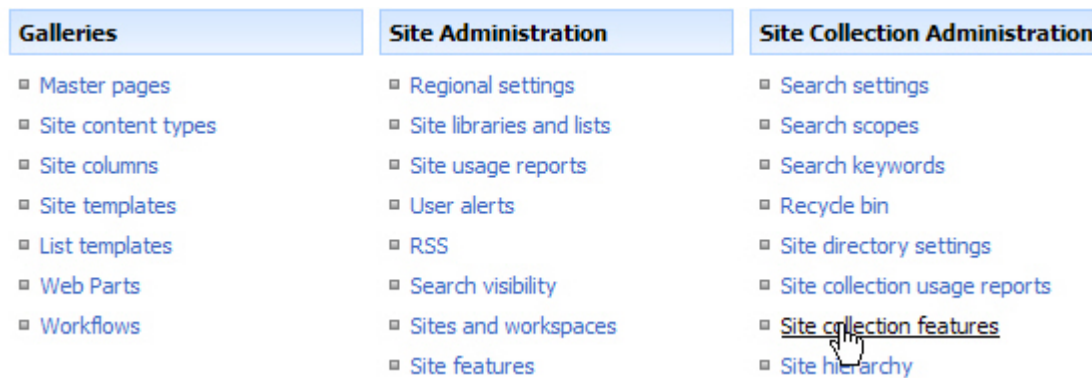
Details will display which web applications are installed the SharePoint List Collection.



Activate and Use:

In the root site of one site collection, click “Site Settings” on “Site Actions” menu. 

In “Site Settings” page, select “Site collection” features.

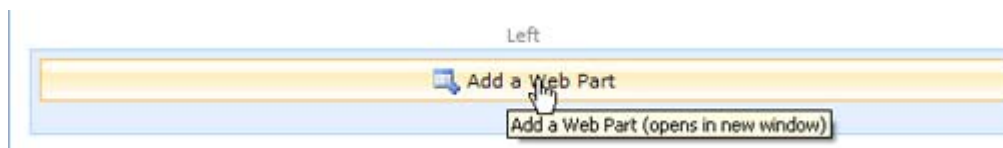


In site collection features, click “Activate” to activate List collection web parts.



Then, on “Site Actions” menu , click “Edit Page”.

In the web part zone which you want to add the web part to, click “Add a Web Part”. In web parts dialog box, select check box for the cross-site list collection web part.



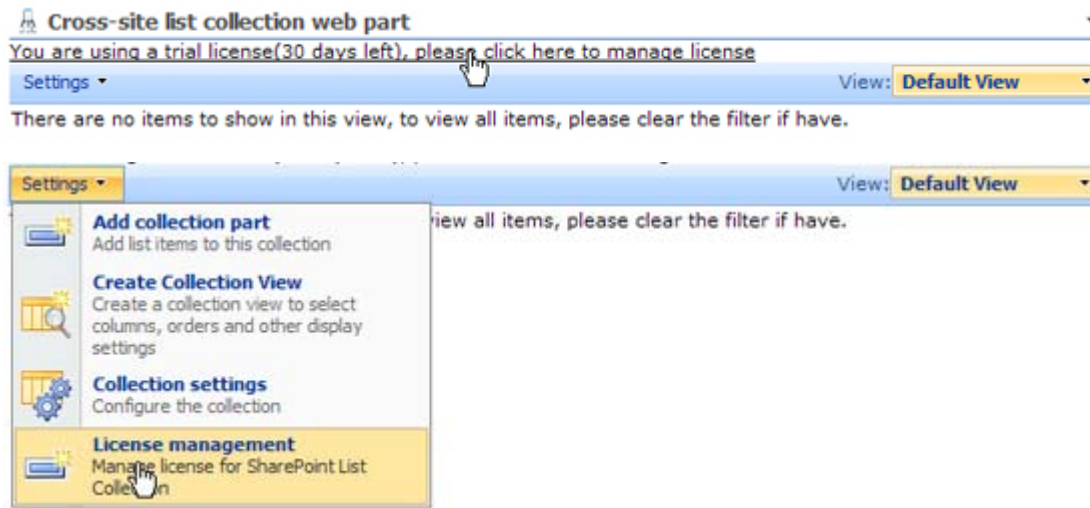
Click “Add” to add list collection web part to the page.



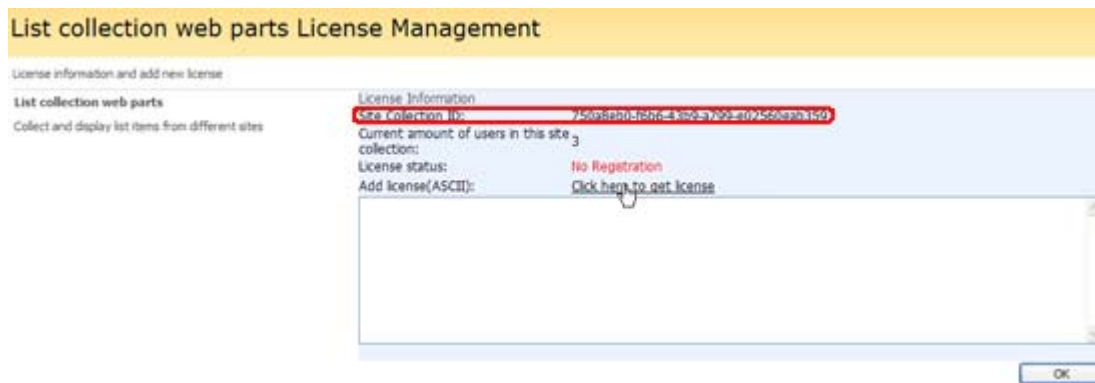
Exit Edit Mode, you can find List collection web part is added on the page.

License Management

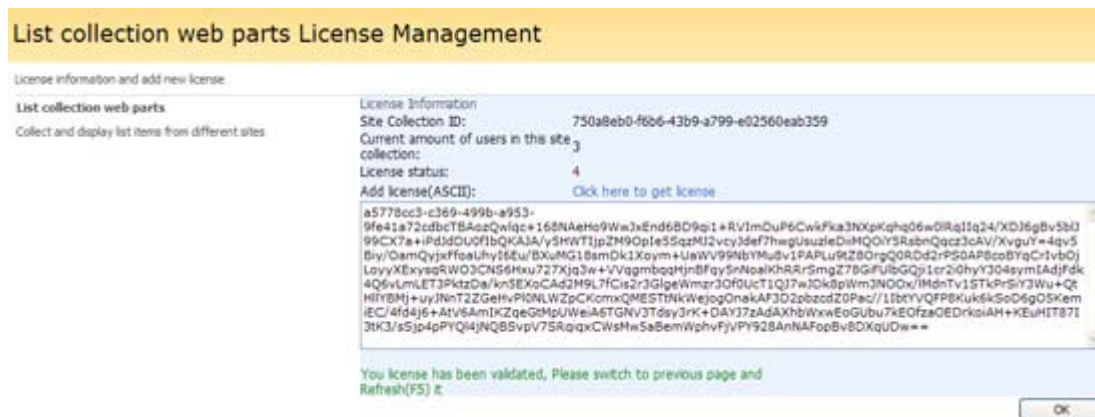
Click the hyper link in List Collection setting page to visit license management page.



After payment, send site collection ID to sales@sharepointboost.com to generate license code.



Enter the license code in the box and click “OK”.



Now, close this page and refresh the previous one, you can use the SharePoint List Collection without 30-day trial limitation.

Uninstall

Run “setup.exe” again. (If your install file has been deleted, you can download it from <http://www.sharepointboost.com>). In Repair and Remove page, select the Remove radio button and click “Next”, the Sharepoint List Collection will be uninstalled.

Repair or Remove

Please select the operation you wish to perform



SharePoint List Collection 1.0.0.0 is already installed. What would you like to do?

- Repair**
Retracts the solution from all web applications and deploys it once again.
- Remove**
Retracts the solution from all web applications and deletes it from the SharePoint solution store.

SharePoint List Collection Tutorial

SharePoint List Collection is a Web Part which can collect lists from different sites to display in a single grid view. It can also create different views as doing in lists.

Following will show how to use SharePoint List Collection.

There are two lists in different sites.

Task Schedule

New			Actions			Settings		View: All Items
ID	Title	Assigned to	Status	Priority	Start Date	Due Date	%Complete	
	Interview !NEW	Henry	Completed	High	11/1/2008 9:00 AM	11/1/2008 4:00 PM	100%	
	Write Case !NEW	Lily	Completed	Normal	11/2/2008 10:00 AM	11/2/2008 5:00 PM	100%	
	Tech Lesson !NEW	Mike	Not Started	Normal	11/4/2008 8:00 AM	11/4/2008 5:00 PM	0%	
	Product testing !NEW	Lily	In Progress	Normal	11/2/2008 9:00 AM	11/5/2008 5:00 PM	60%	
	Tech support !NEW	Henry	Not Started	High	11/4/2008 9:00 AM	11/5/2008 5:00 PM	0%	
	sharepoint learning !NEW	Developer	In Progress	Normal	11/3/2008 8:00 AM	11/4/2008 5:00 PM	50%	

Pic_1

Meeting schedule

New			Actions			Settings		View: All Items
ID	Title	Assigned to	Status	Priority	Start Date	Due Date	%Complete	
	Tech Discussion !NEW	Developer	Completed	Normal	10/31/2008 9:00 AM	10/31/2008 5:00 PM	100%	
	Product Launch !NEW	Jerry	Completed	High	11/2/2008 10:00 AM	11/2/2008 11:00 AM	100%	
	Breakfast meeting !NEW	Developer	In Progress	High	11/3/2008 9:00 AM	11/7/2008 9:00 AM	20%	
	Product Demo !NEW	Cathy	Not Started	High	11/4/2008 9:00 AM	11/4/2008 11:00 AM	0%	
	Reception !NEW	Bill	Not Started	High	11/4/2008 1:00 PM	11/4/2008 5:00 PM	0%	

Pic_2

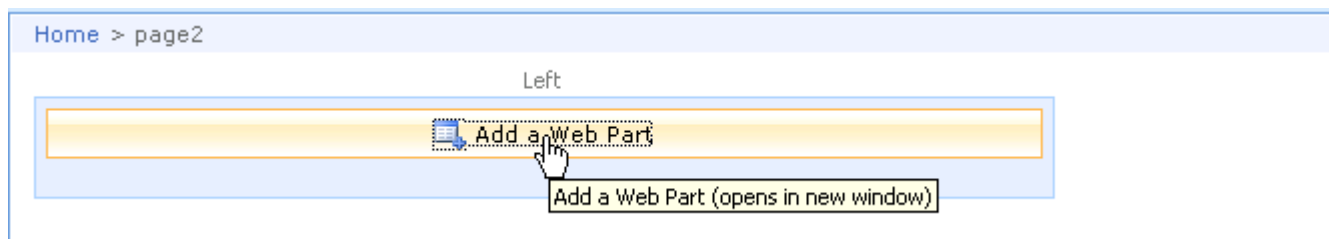
1. Add Cross-site list collection web part

Open the page to which you want to add list collection web part. Click “Edit Page” on “Site Actions menu”.



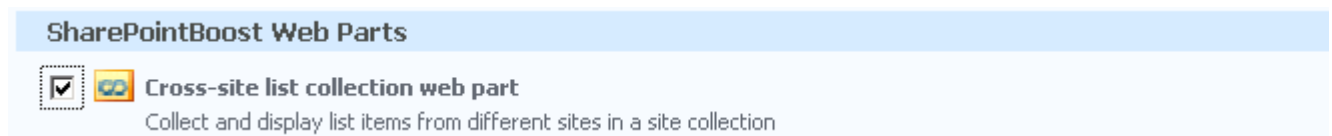
Pic_3

Then, click “Add a Web Part”.



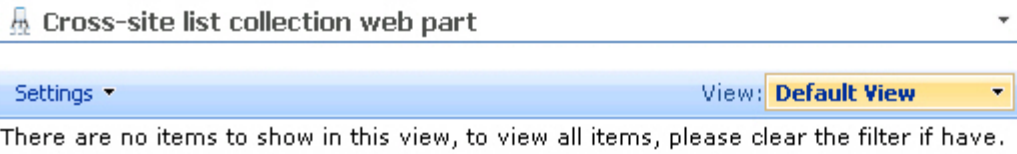
Pic_4

Choose cross-site collection web part, and click “Add”.



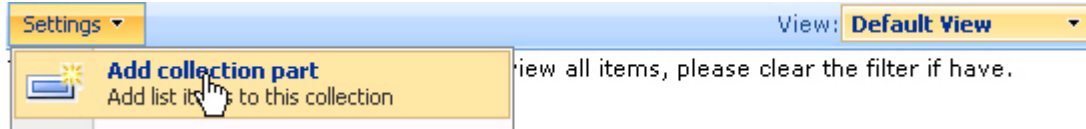
Pic_5

Exit Edit Mode, and cross-site list collection web part has been added on the page.



Pic_6

2. Add collection part
On the Settings menu, click “Add collection part”.



Pic_7

On “Add collection part page”, select the site, list and view.

Collect information from
Please select site, list and view to collect items in the view

Select site:

Select list:

Select view:

Pic_8

Then select columns, and click “OK”.

Column mapping
Please select which columns will be displayed in the web part and input their new column names

<input checked="" type="checkbox"/> Title	Mapping to	<input type="text" value="Title"/>
<input checked="" type="checkbox"/> Priority	Mapping to	<input type="text" value="Priority"/>
<input checked="" type="checkbox"/> Status	Mapping to	<input type="text" value="Status"/>
<input checked="" type="checkbox"/> % Complete	Mapping to	<input type="text" value="% Complete"/>
<input checked="" type="checkbox"/> Assigned To	Mapping to	<input type="text" value="Assigned To"/>
<input type="checkbox"/> Task Group	Mapping to	<input type="text" value="Task Group"/>
<input type="checkbox"/> Description	Mapping to	<input type="text" value="Description"/>
<input checked="" type="checkbox"/> Start Date	Mapping to	<input type="text" value="Start Date"/>
<input checked="" type="checkbox"/> Due Date	Mapping to	<input type="text" value="Due Date"/>
<input type="checkbox"/> ID	Mapping to	<input type="text" value="ID"/>
<input type="checkbox"/> Content Type	Mapping to	<input type="text" value="Content Type"/>
<input type="checkbox"/> Modified	Mapping to	<input type="text" value="Modified"/>
<input type="checkbox"/> Created	Mapping to	<input type="text" value="Created"/>
<input type="checkbox"/> Created By	Mapping to	<input type="text" value="Created By"/>
<input type="checkbox"/> Modified By	Mapping to	<input type="text" value="Modified By"/>
<input type="checkbox"/> Version	Mapping to	<input type="text" value="Version"/>
<input type="checkbox"/> Attachments	Mapping to	<input type="text" value="Attachments"/>
<input checked="" type="checkbox"/> From Site	Mapping to	<input type="text" value="From Site"/>
<input checked="" type="checkbox"/> From List	Mapping to	<input type="text" value="From List"/>

Pic_9

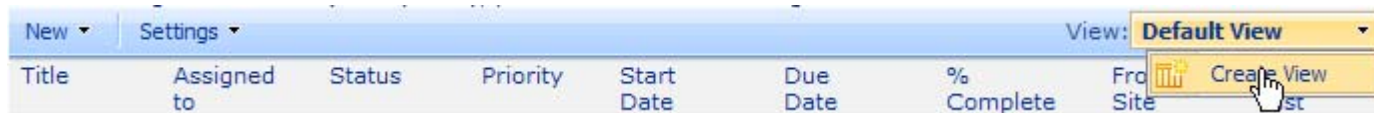
After adding, return to the front page, the items from different lists are displayed on list collection web part.

New ▾		Settings ▾		View: Default View ▾				
Title	Assigned to	Status	Priority	Start Date	Due Date	% Complete	From Site	From List
Interview	Henry	Completed	High	11/1/2008 9:00 AM	11/1/2008 4:00 PM	100 %	Sharepoint Lists	Task Schedule
Write Case	Lily	Completed	Normal	11/2/2008 10:00 AM	11/2/2008 5:00 PM	100 %	Sharepoint Lists	Task Schedule
Tech Lesson	Mike	Not Started	Normal	11/4/2008 8:00 AM	11/4/2008 5:00 PM	0 %	Sharepoint Lists	Task Schedule
Product testing	Lily	In Progress	Normal	11/2/2008 9:00 AM	11/5/2008 5:00 PM	60 %	Sharepoint Lists	Task Schedule
Tech support	Henry	Not Started	High	11/4/2008 9:00 AM	11/5/2008 5:00 PM	0 %	Sharepoint Lists	Task Schedule
sharepoint learning	Developer	In Progress	Normal	11/3/2008 8:00 AM	11/4/2008 5:00 PM	50 %	Sharepoint Lists	Task Schedule
Tech Discussion	Developer	Completed	Normal	10/31/2008 9:00 AM	10/31/2008 5:00 PM	100 %	Case	Meeting schedule
Product Launch	Jerry	Completed	High	11/2/2008 10:00 AM	11/2/2008 11:00 AM	100 %	Case	Meeting schedule
Breakfast meeting	Developer	In Progress	High	11/3/2008 9:00 AM	11/7/2008 9:00 AM	20 %	Case	Meeting schedule
Product Demo	Cathy	Not Started	High	11/4/2008 9:00 AM	11/4/2008 11:00 AM	0 %	Case	Meeting schedule
Reception	Bill	Not Started	High	11/4/2008 1:00 PM	11/4/2008 5:00 PM	0 %	Case	Meeting schedule

Pic_10

3. Create view for list collection.

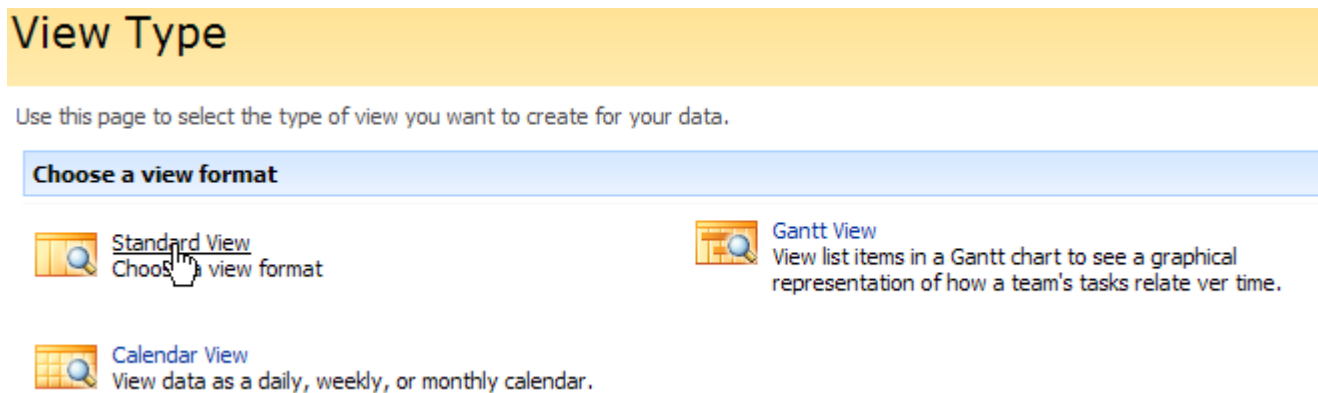
Click “Create View” in the View menu or in the Settings menu.



Pic_11

Create Standard View

In “Choose a view format” section, click “Standard View”.



Pic_12

In “Name and Audience” section, type a view name, and choose View Audience.

<p>Name</p> <p>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.</p>	<p>View Name:</p> <input type="text" value="Completed View"/> <p><input type="checkbox"/> Make this the default view (Applies to public views only)</p>
<p>Audience</p> <p>Select the option that represents the intended audience for this view.</p>	<p>View Audience:</p> <p><input type="radio"/> Create a Personal View Personal views are intended for your use only.</p> <p><input checked="" type="radio"/> Create a Public View Public views can be visited by anyone using the site.</p>

Pic_13

In “Filter” section, choose the lists and list view name of the lists.

Filter
Select List and View to filter the items

Display	Site Name	List Name	View Name
<input checked="" type="checkbox"/>	Sharepoint Lists	Task Schedule	Completed
<input checked="" type="checkbox"/>	Case	Meeting schedule	Completed

Pic_14

Select the columns, and specify the display order 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"/>	Title	1
<input checked="" type="checkbox"/>	Priority	2
<input checked="" type="checkbox"/>	Status	3
<input checked="" type="checkbox"/>	% Complete	4
<input checked="" type="checkbox"/>	Assigned To	5
<input checked="" type="checkbox"/>	Start Date	6
<input checked="" type="checkbox"/>	Due Date	7
<input checked="" type="checkbox"/>	From Site	8
<input checked="" type="checkbox"/>	From List	9

Pic_15

Then, in “Edit Menu” section, select the column linked to “Edit Menu”.

Edit Menu
Add edit menu to a column, by which you can edit items as you do it in list.

Link to:

Title


Pic_16


In “Sort section”, choose which column to sort and specify the sort order.

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

First sort by the column:

Start Date

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

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


Pic_17


In “Group By” section, select the column to determine how to group items in the view.

Group By
Select a column to determine how to group items in the list collection will be displayed in

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:

5

Pic_18

In “Item Limit” section, type the number of items to display per page, 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:

Pic_19

Then, click “OK”. Go to list collection web part page, and the view is created as following.

New		Settings					View: Completed View	
Title	Assigned to	Status	Priority	Start Date↓	Due Date	% Complete	From Site	From List
Priority : High (2)								
Product Launch	Jerry	Completed	High	11/2/2008 10:00 AM	11/2/2008 11:00 AM	100 %	Case	Meeting schedule
Interview	Henry	Completed	High	11/1/2008 9:00 AM	11/1/2008 4:00 PM	100 %	Sharepoint Lists	Task Schedule
Priority : Normal (2)								
Write Case	Lily	Completed	Normal	11/2/2008 10:00 AM	11/2/2008 5:00 PM	100 %	Sharepoint Lists	Task Schedule
Tech Discussion	Developer	Completed	Normal	10/31/2008 9:00 AM	10/31/2008 5:00 PM	100 %	Case	Meeting schedule

Pic_20

Create Gantt View

Click “Gantt View” in “Choose a view”.

Specify “View Name” and “View Audience”.

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)

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.

Pic_21

Select the list and view to display in the view.

Filter
Select List and View to filter the items

Display	Site Name	List Name	View Name
<input checked="" type="checkbox"/>	Sharepoint Lists	Task Schedule	Active
<input checked="" type="checkbox"/>	Case	Meeting schedule	Active

Pic_22

Specify the columns and position in “Columns” section.

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"/>	Title	1
<input checked="" type="checkbox"/>	Assigned to	2
<input checked="" type="checkbox"/>	Status	3
<input checked="" type="checkbox"/>	Priority	4
<input checked="" type="checkbox"/>	Start Date	5
<input checked="" type="checkbox"/>	Due Date	6
<input checked="" type="checkbox"/>	%Complete	7
<input checked="" type="checkbox"/>	From Site	8
<input checked="" type="checkbox"/>	From List	9

Pic_23

Specify "Title", "Start Date", "Due Date", and "Percent Complete" fields.

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:

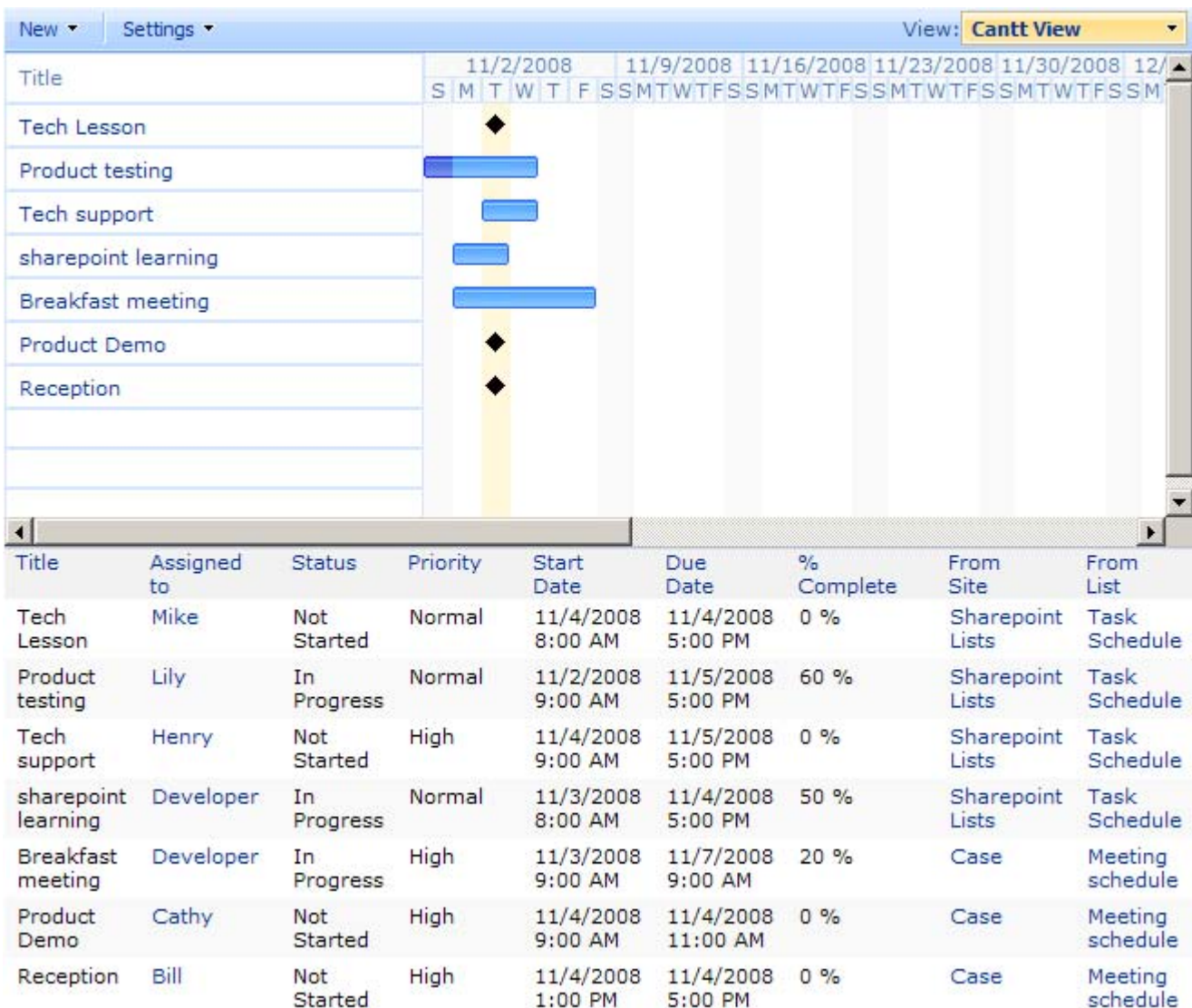
Start Date:

Due Date:

Percent Complete:

Pic_24

Then, click "OK". The following is the Gantt View.



Pic_25

Create Calendar view

In “Choose a view” section, click Calendar View.
Specify View Name and View Audience in the Name and Audience section.

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: <input type="text" value="Calendar View"/> <input type="checkbox"/> Make this the default view (Applies to public views only)
Audience Select the option that represents the intended audience for this view.	View Audience: <input type="radio"/> Create a Personal View Personal views are intended for your use only. <input checked="" type="radio"/> Create a Public View Public views can be visited by anyone using the site.

Pic_26

Select the list and view in “Filter” section.

Filter Select List and View to filter the items	<table border="1"><thead><tr><th>Display</th><th>Site Name</th><th>List Name</th><th>View Name</th></tr></thead><tbody><tr><td><input checked="" type="checkbox"/></td><td>Sharepoint Lists</td><td>Task Schedule</td><td>Active</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Case</td><td>Meeting schedule</td><td>Active</td></tr></tbody></table>	Display	Site Name	List Name	View Name	<input checked="" type="checkbox"/>	Sharepoint Lists	Task Schedule	Active	<input checked="" type="checkbox"/>	Case	Meeting schedule	Active
Display	Site Name	List Name	View Name										
<input checked="" type="checkbox"/>	Sharepoint Lists	Task Schedule	Active										
<input checked="" type="checkbox"/>	Case	Meeting schedule	Active										

Pic_27

Choose the columns to display in “Columns” section.

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.	<table border="1"><thead><tr><th>Display</th><th>Column Name</th><th>Position from Left</th></tr></thead><tbody><tr><td><input checked="" type="checkbox"/></td><td>Title</td><td>1</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Assigned to</td><td>2</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Status</td><td>3</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Priority</td><td>4</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Start Date</td><td>5</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Due Date</td><td>6</td></tr><tr><td><input checked="" type="checkbox"/></td><td>%Complete</td><td>7</td></tr><tr><td><input checked="" type="checkbox"/></td><td>From Site</td><td>8</td></tr><tr><td><input checked="" type="checkbox"/></td><td>From List</td><td>9</td></tr></tbody></table>	Display	Column Name	Position from Left	<input checked="" type="checkbox"/>	Title	1	<input checked="" type="checkbox"/>	Assigned to	2	<input checked="" type="checkbox"/>	Status	3	<input checked="" type="checkbox"/>	Priority	4	<input checked="" type="checkbox"/>	Start Date	5	<input checked="" type="checkbox"/>	Due Date	6	<input checked="" type="checkbox"/>	%Complete	7	<input checked="" type="checkbox"/>	From Site	8	<input checked="" type="checkbox"/>	From List	9
Display	Column Name	Position from Left																													
<input checked="" type="checkbox"/>	Title	1																													
<input checked="" type="checkbox"/>	Assigned to	2																													
<input checked="" type="checkbox"/>	Status	3																													
<input checked="" type="checkbox"/>	Priority	4																													
<input checked="" type="checkbox"/>	Start Date	5																													
<input checked="" type="checkbox"/>	Due Date	6																													
<input checked="" type="checkbox"/>	%Complete	7																													
<input checked="" type="checkbox"/>	From Site	8																													
<input checked="" type="checkbox"/>	From List	9																													

Pic_28

Specify view title and sub heading in the calendar Columns section.

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: <input type="text" value="Title"/> Week View Title: <input type="text" value="Title"/> Week View Sub Heading: <input type="text" value="Assigned to"/> Day View Title: <input type="text" value="Title"/> Day View Sub Heading: <input type="text" value="Due Date"/>
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Pic_29

In “Default Scope” section, choose which scope type you want.

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.

Pic_30

In “Time Interval” section, specify “Begin” and “End” date.

Time Interval

Specify the columns used to place items in the calendar.

Begin:

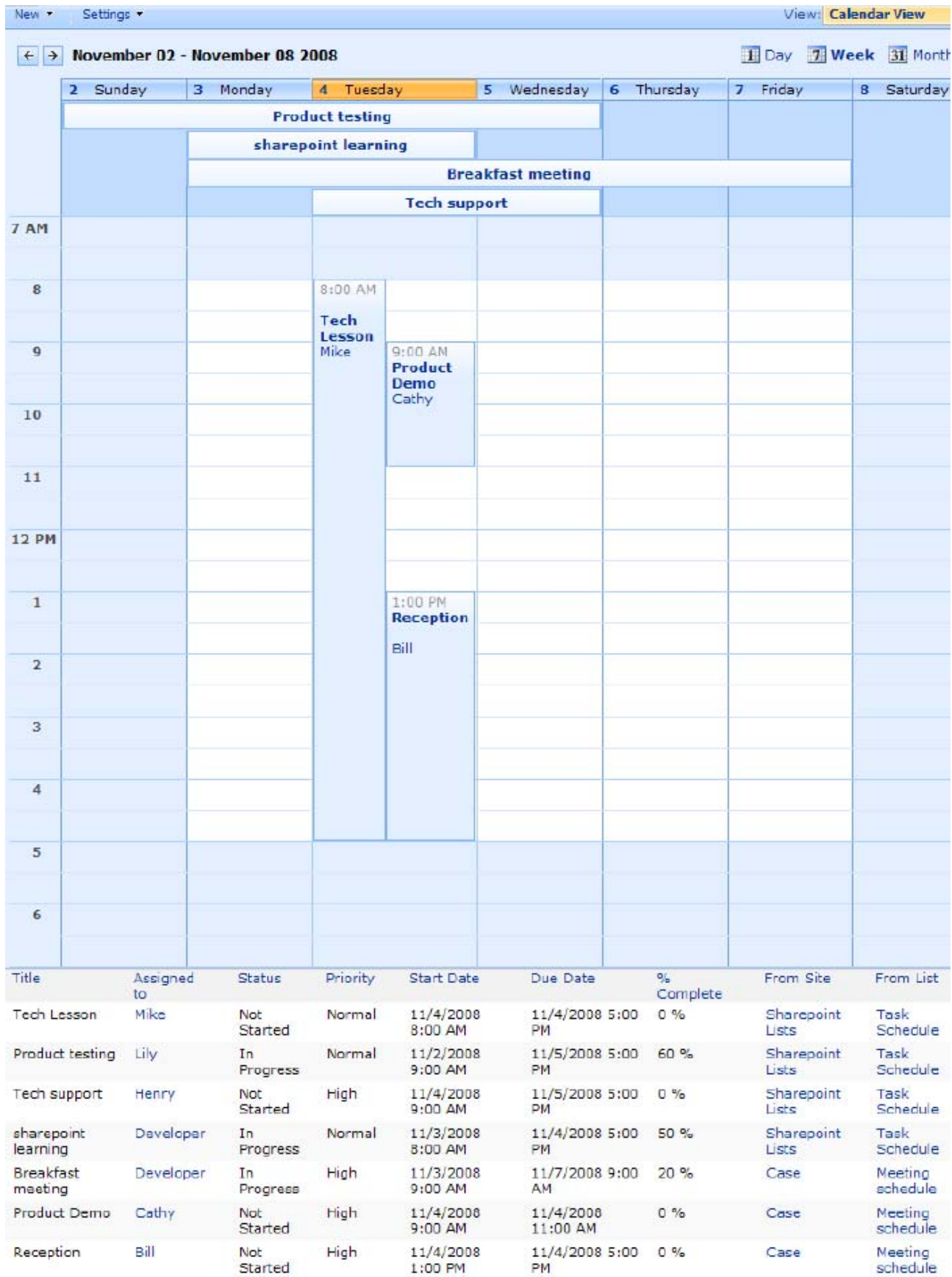
Start Date

End:

Due Date

Pic_31

Then, click “OK”. The following is the Calendar View.



Pic_32

4. Filter

You can filter items according to condition in the standard, project and calendar view. For instance, you want to display items which are assigned to Lily form the Task Schedule in the Gantt View.

Click the arrow in the “From List” column header of the web part, choose “Task Schedule”.



Pic_33

Click the arrow in the Assigned to column header, choose Lily.

Title	Assigned to	Status	Priority	Start Date	Due Date	% Complete	From Site
Clear Filter from Assigned to		Not Started	Normal	11/4/2008 8:00 AM	11/4/2008 5:00 PM	0 %	Sharepoint Lists
Developer		In Progress	Normal	11/2/2008 9:00 AM	11/5/2008 5:00 PM	60 %	Sharepoint Lists
Henry							
Lily		Not Started	High	11/4/2008 9:00 AM	11/5/2008 5:00 PM	0 %	Sharepoint Lists
Mike							

Pic_34

The following is the result.

Title	Assigned to	Status	Priority	Start Date	Due Date	% Complete	From Site	From List
Product testing	Lily	In Progress	Normal	11/2/2008 9:00 AM	11/5/2008 5:00 PM	60 %	Sharepoint Lists	Task Schedule

Pic_35

The filter is the same as standard and calendar view.

5. Manipulate items

You can manipulate items directly on list collection web part. Click the arrow that appears on the column which links to “Edit Menu”, you can manipulate the item as you do in list view web part.

Title	Assigned to	Status	Priority	Start Date	Due Date	% Complete	From Site
Interview	Henry	Completed	High	11/1/2008 9:00 AM	11/1/2008 4:00 PM	100 %	Sharepoint Lists
		Completed	Normal	11/2/2008 10:00 AM	11/2/2008 5:00 PM	100 %	Sharepoint Lists

Pic_36

The manipulation is the same as gantt view and calendar view.

6. Add items

List collection web part supports adding items to different lists.

On “New” menu, you can choose which list you want to add item to. For instance, you can add an item to “Task Schedule” list in SharePoint Lists site.

Day	4 Tuesday	5 Wednesday	6 Thursday	7 Friday
Product testing				

Pic_37

The new item is added to “Task Schedule” list and also displayed on the calendar view of list collection web part.

New		Actions		Settings		View: All Items	
ID	Title	Assigned to	Status	Priority	Start Date	Due Date	%Complete
	Interview	Henry	Completed	High	11/1/2008 9:00 AM	11/1/2008 4:00 PM	100%
	Write Case	Lily	Completed	Normal	11/2/2008 10:00 AM	11/2/2008 5:00 PM	100%
	Tech Lesson	Mike	Not Started	Normal	11/4/2008 8:00 AM	11/4/2008 5:00 PM	0%
	Product testing	Lily	In Progress	Normal	11/2/2008 9:00 AM	11/5/2008 5:00 PM	60%
	Tech support	Henry	Not Started	High	11/4/2008 9:00 AM	11/5/2008 5:00 PM	0%
	sharepoint learning	Developer	In Progress	Normal	11/3/2008 8:00 AM	11/4/2008 5:00 PM	50%
	Tech support NEW	Mike	Not Started	High	11/5/2008 9:00 AM	11/5/2008 12:00 PM	0%

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2	3	4	5	6	7
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
Product testing					
	sharepoint learning				
	Breakfast meeting				
		Tech support			
		8:00 AM			
		Tech Lesson Mike			
			9:00 AM	9:00 AM	
			Product Demo Cathy	Tech support Mike	

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The operation is the same as standard and Gantt view.