



BoostSolutions List Collection App

User Guide

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Content

1. Introduction.....	3
2. Installation.....	4
2.1 Add the App from the SharePoint Store.....	4
3. How to Use List Collection App.....	6
3.1 Add List Collection Web Part on SharePoint.....	6
3.2 Add List Collection Web Part as a Tab in Teams.....	7
3.3 Add List Collection Web Part to the Left Sidebar in Teams.....	7
3.4 Configure List Collection Settings.....	8
3.5 Add/Edit/Delete a Collection Part.....	9
3.6 Create/Modify/Delete a View.....	13
3.7 Manage an Item on Web Part.....	17
3.8 Export to Excel.....	18
Appendix 1: Subscription Management.....	19

1. Introduction

The SharePoint List Collection App allows you to aggregate items or documents from various SharePoint Online lists or document libraries into a single location.

With the ability to create different views, making it easier to organize and categorize the items or files on the web part.

It also offers seamless integration with Microsoft Teams, making it accessible across both Microsoft Teams channels and the SharePoint portal.

This document is used to guide you how to use this app in SharePoint or Teams.

For the latest copy and other guides, please visit:

<https://www.boostsolutions.com/download-documentation.html>

2. Installation

2.1 Add the App from the SharePoint Store

Before this operation, ensure that the user account that is performing this procedure is a member of the site Owners group, or has the same permission.

- a. On the site where you want to add an app, go to Settings  and then select **Add an app**.
- b. On the Site Contents page, click **Add an App**.
- c. Search "BoostSolutions List Collection" in the search bar.
- d. Once the app appears in the search result, click on it.
- e. On the app page, click on **Add to Apps site** button.
- f. Allow the system to complete the validation process. You can choose to either **Only enable this app** or **Enable this app and add it to all sites** (recommended). If the latter option is not selected, the app will need to be individually added to each site where you want to use it.

Confirm data access ×

 BoostSolutions List Collection

The app you're about to enable will have access to data by using the identity of the person using it. Enable this app only if you trust the developer or publisher.

This app gets data from:

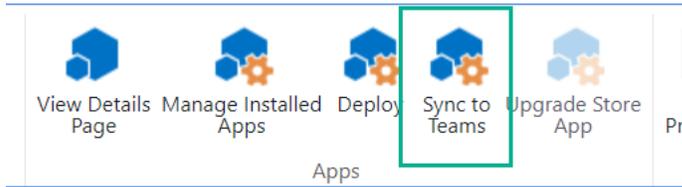
- SharePoint

App availability

Only enable this app
Selecting this option makes the app available for site owners to add from the My apps page. [Learn how to add an app to a site](#)

Enable this app and add it to all sites
Selecting this option adds the app automatically so site owners don't need to.

- g. And then click **Add** button.
- h. Now the app has been successfully added in your SharePoint.
- i. Browse to the App Catalog.
- j. Select 'BoostSolutions List Collection' and open up Files tab in the ribbon. Click '**Sync to Teams**'.



- k. Make sure that you see the following confirmation in the upper right corner of your screen: 'Successfully synced teams solution'.

Now, you have successfully installed 'BoostSolutions List Collection' on your office 365 tenant. You can use it either Microsoft Teams or SharePoint.

3. How to Use List Collection App

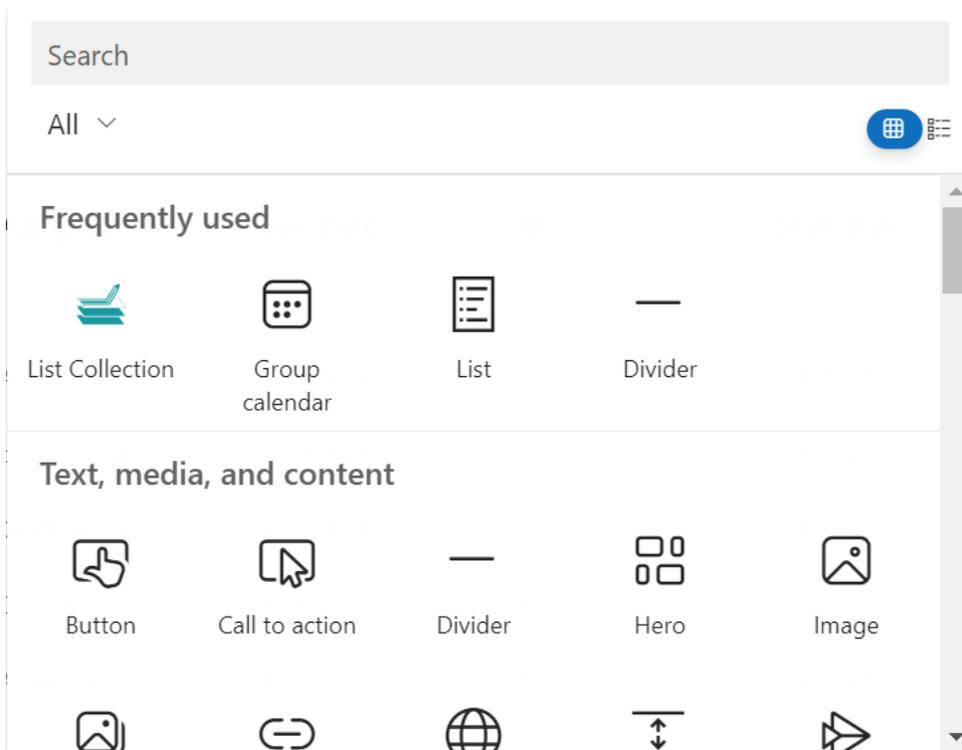
3.1 Add List Collection Web Part on SharePoint

- Go to the page where you want to add the List Collection Web Part.
- If the page is not already in edit mode, click **Edit** at the top right of the page.
- Hover your mouse above or below an existing web part or under the title region, and you'll see a line with a circled +, like this:



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

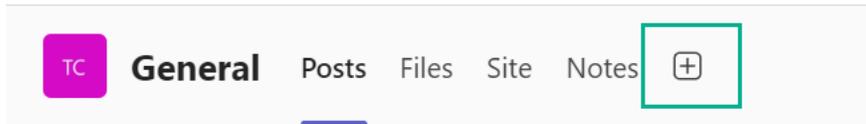
If you do not find the web part, type **List Collection** in the **Search** box.



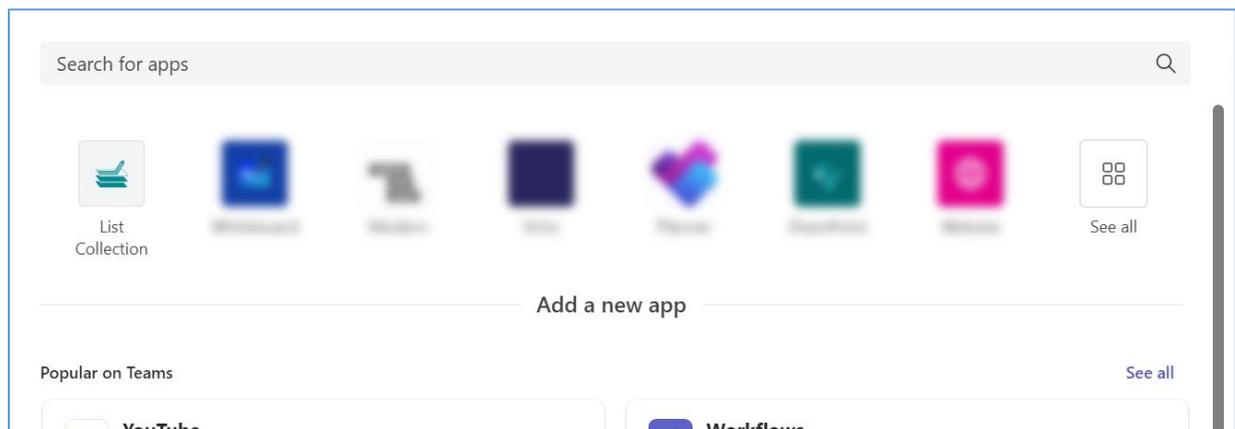
3.2 Add List Collection Web Part as a Tab in Teams

BoostSolutions' List Collection integrates with Teams, allowing you to add the app to a channel or team. The features within Teams are identical to those in SharePoint.

- To add the app in Teams, ensure that the app has been deployed to all sites in your organization and has been synced to Teams.
- Once the app has been successfully synced, it can be found within Teams.
- Navigate to the Teams channel you want to add the app and click on the '+' sign to create a new tab.



- From there, search for and select the 'List Collection'.



- Follow the prompts to add the tab. Once the tab is created, you can add lists or document libraries in the web part.

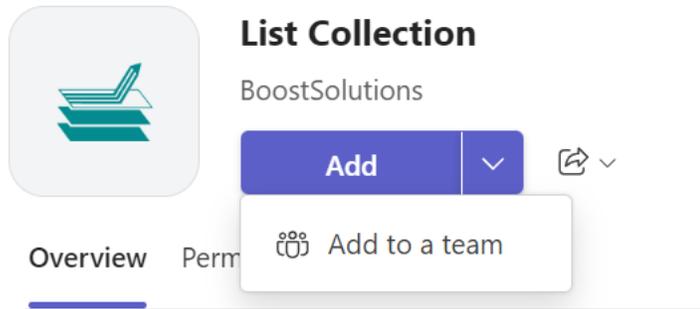
The process of adding lists or libraries is the same as in SharePoint, you can refer to chapter [Add/Edit/Delete a Collection Part](#) or detailed instructions.

Please note that within the channel, you can only add the lists or document libraries that belong to the site to which the channel is connected.

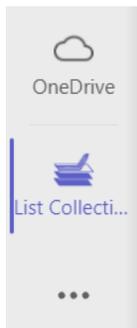
3.3 Add List Collection Web Part to the Left Sidebar in Teams

- In your Teams, click on **'Apps'** from the left sidebar.
- From there, search for and select the **'List Collection'**.

- c. Click on **'Add'**. If you want to add the app to a team, click the dropdown menu and select **'Add to a team'**.



- d. After you've added the app, it will appear on the left sidebar of Teams. If you do not see it, click on the ellipsis (...), and you should find it there.



- e. After adding the app on the left sidebar, you can add the lists or document libraries in the same manner in SharePoint. For detailed instructions, refer to the chapter [Add/Edit/Delete a Collection Part](#).

Please note that from the left sidebar, you can add lists or documents from all sites within your organization to the List Collection web part.

3.4 Configure List Collection Settings

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

Whether you're in SharePoint or Teams, the process for configuring these settings remains the same.

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

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

General Settings

Export Settings

Enable Export to CSV

Allow users to export aggregated list data to a CSV file.

Form Settings

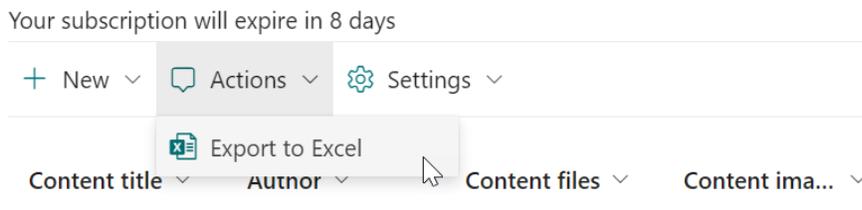
How would you like to open list forms?

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

In dialog

New tab

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



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

3.5 Add/Edit/Delete a Collection Part

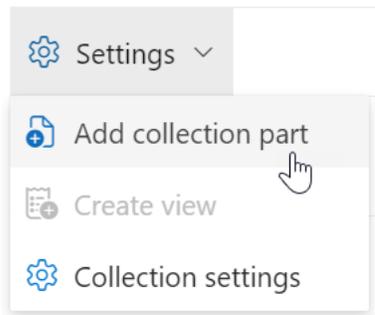
The List Collection App provides the functionality to gather multiple lists or document libraries from different sites. The procedures for adding, editing, or deleting a collection part are identical, whether you're using SharePoint or Teams.

On SharePoint, to add a Collection part, you must have at least a **Contribute** permission level.

In Teams, make sure that you have the permission to access the desired list or document library.

Add a Collection Part

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



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

Collect Information from Site

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

Select site:	<input type="text" value="PA Team Site"/>
Select list:	<input type="text" value="PA Team Events"/>
Select folder:	<input type="text" value="PA Team Events"/> <input checked="" type="checkbox"/> Include sub folders
Select view:	<input type="text" value="All Items"/>

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

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

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

Column Mapping

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

<input type="checkbox"/> Title	Map to:	Title
<input checked="" type="checkbox"/> Event (linked to item with edit ...	Map to:	Event
<input type="checkbox"/> Color Tag	Map to:	Color Tag
<input type="checkbox"/> Compliance Asset Id	Map to:	Compliance Asset Id
<input checked="" type="checkbox"/> Start Time	Map to:	Start Time
<input checked="" type="checkbox"/> End Time	Map to:	End Time
<input checked="" type="checkbox"/> Category	Map to:	Category
<input checked="" type="checkbox"/> Attendees	Map to:	Attendees
<input type="checkbox"/> ID	Map to:	ID
<input type="checkbox"/> Content Type	Map to:	Content Type
<input type="checkbox"/> Modified	Map to:	Modified
<input type="checkbox"/> Title (linked to item)	Map to:	Title
<input checked="" type="checkbox"/> From List	Map to:	From List
<input checked="" type="checkbox"/> From Site	Map to:	From Site

d. And then click **OK**.

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

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

Edit a Collection Part

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

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

Parts

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

From Site	From List	From Folder	Edit (click to edit)	Deletion (click to delete)
PA Team Site	PA Team Events	PA Team Events	 Edit...	 Delete...
PD Team Site	PD Team Events	PD Team Events	 Edit...	 Delete...
+ Add a collection part				

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

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

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

- c. And then click **OK**.

Delete a Collection Part

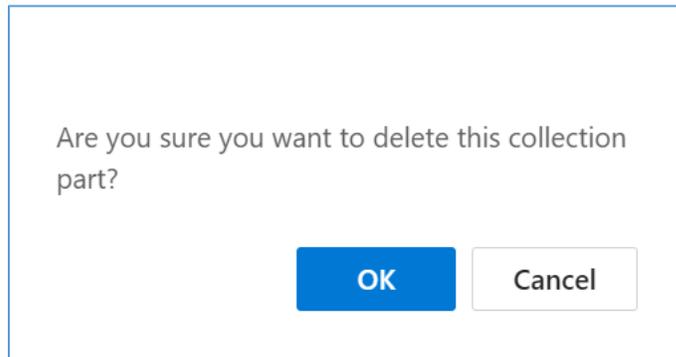
- a. To delete a collection part, click on the List Collection Web Part, and then click Settings > Collection Settings, and click on the **Delete** to delete it.

Parts

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

From Site	From List	From Folder	Edit (click to edit)	Deletion (click to delete)
PA Team Site	PA Team Events	PA Team Events	 Edit...	 Delete...
PD Team Site	PD Team Events	PD Team Events	 Edit...	 Delete...
+ Add a collection part				

- b. Click **OK** to confirm, then the contents of list or library will be deleted from the web part.



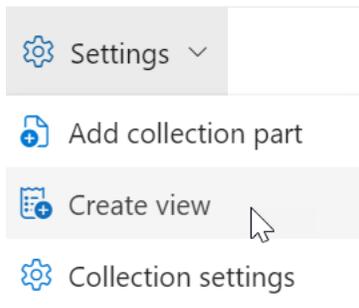
3.6 Create/Modify/Delete a View

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

The processes for creating, modifying, or deleting a view are consistent, regardless of whether you're using SharePoint or Teams.

Create a View

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



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

Create View ×

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

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

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.

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

Filter

Select list and view to filter the items.

	Site	List	Folder	View
<input checked="" type="checkbox"/>	PA Team Site	PA Team Events	PA Team Events	All Items ▾
<input checked="" type="checkbox"/>	PD Team Site	PD Team Events	PD Team Events	All Items ▾

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

Columns

Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the Position from the box on the left.

	Column Name	Position from Left
<input checked="" type="checkbox"/>	Event	1 ▾
<input checked="" type="checkbox"/>	Attendees	2 ▾
<input checked="" type="checkbox"/>	Category	3 ▾
<input checked="" type="checkbox"/>	End Time	4 ▾
<input checked="" type="checkbox"/>	From List	6 ▾
<input checked="" type="checkbox"/>	From Site	7 ▾
<input checked="" type="checkbox"/>	Start Time	5 ▾

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

Edit Menu

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

Link to:

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

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

Sort

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

Sort by the column:

None

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

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

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

Group By

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

Group by the column:

Category

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

By default, show groupings:

- Collapsed
- Expanded

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

Totals

Select one or more totals to display.

Column Name

Total

Category

None

End Time

None

From List

None

From Site

None

Start Time

None

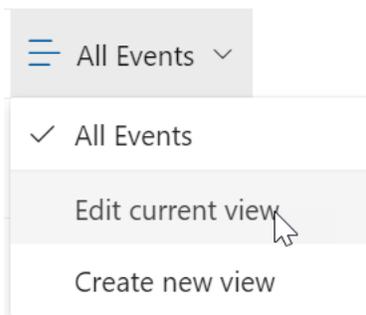
- j. Click **OK** to save the settings.
- k. Then, the items of selected list will be shown on the web part as follows.

Event	Attendees	Category	Start Time	End Time	From List	From Site
Category: Business (1)						
Marketing Research	PA team	Business	3/7/2024 2:00 PM	3/7/2024 4:00 PM	PA Team Events	PA Team Site
Category: Company Event (3)						
Friday conference	All Company Mem...	Company Event	3/15/2024 3:30 PM	3/15/2024 5:00 PM	PA Team Events	PA Team Site
Teambuilding	All members	Company Event	3/14/2024 3:00 PM	3/14/2024 5:00 PM	PD Team Events	PD Team Site
Get-together	All Company Mem...	Company Event	3/24/2024 2:00 PM	3/24/2024 5:00 PM	PD Team Events	PD Team Site
Category: Meeting (5)						
UI review	PA team	Meeting	3/11/2024 10:00 AM	3/11/2024 11:00 AM	PA Team Events	PA Team Site
PA team discussion	PA team	Meeting	3/4/2024 3:00 PM	3/4/2024 4:00 PM	PA Team Events	PA Team Site
Product Plan	PA team	Meeting	3/6/2024 10:00 AM	3/6/2024 11:00 AM	PA Team Events	PA Team Site
Month Review	PD team	Meeting	3/5/2024 2:00 PM	3/5/2024 4:00 PM	PD Team Events	PD Team Site
Kick off	PD team	Meeting	3/6/2024 10:00 AM	3/6/2024 11:00 AM	PD Team Events	PD Team Site
Category: Work Hours (1)						
Team Web Design	PD team	Work Hours	3/13/2024 9:00 AM	3/13/2024 10:00 AM	PD Team Events	PD Team Site

Modify a View

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

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



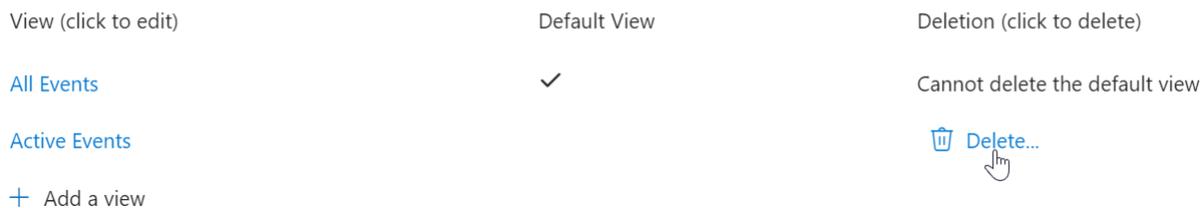
- Make the changes and click OK.

Delete a View

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

Views

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



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

3.7 Manage an Item on Web Part

The List Collection App enables you to add, edit, and delete items directly on the web part. Any modifications will be automatically updated in the original lists.

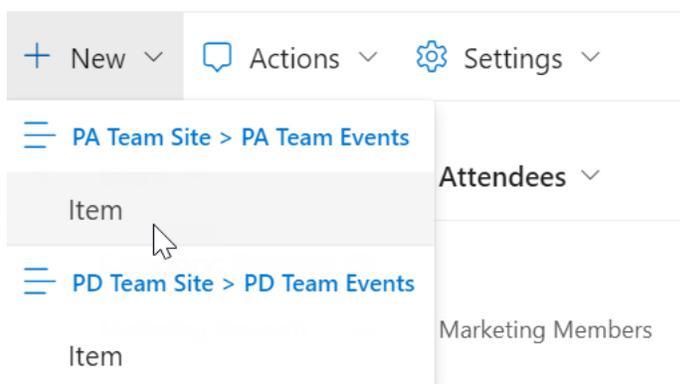
The processes for adding, editing, or deleting an item are consistent, whether you're using SharePoint or Teams.

However, it's important to note that your ability to operate items in Teams is determined by your permissions in the corresponding list. If you have the necessary permissions to add, edit, or delete items in the list, you'll be able to perform these operations in Teams. If you do not have these permissions, you will not be able to carry out these operations.

- a. In the New drop-down menu, you can choose which list to add an item to.

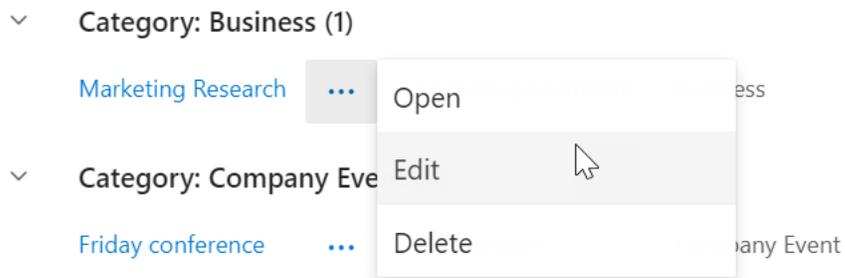
If there are multiple content types in the list, you can choose one from the drop-down menu.

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



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

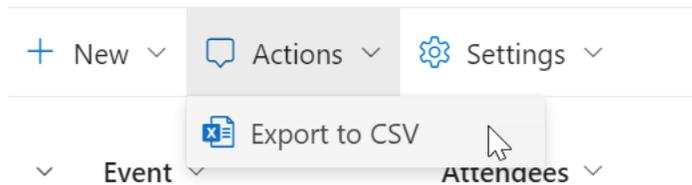
To view, edit or delete an item, click the context menu of the target item. Any changes made of and item will be updated to the source item.



3.8 Export to Excel

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

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



Appendix 1: Subscription Management

You can use List Collection App trial subscription for a period of 30 days since the day you first use it.

If the trial subscription period ends, you will need to buy a subscription.

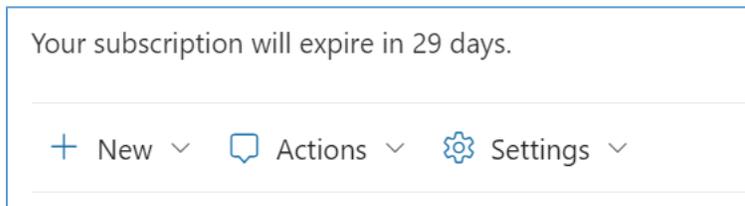
The subscription of List Collection App is per site (previously called "site collection") or tenant annually.

For site collection subscription, there are no end-user limitations. All users in site collection can access the app.

For tenant subscription, there are no sites or site collection limitation. All users can access the app in all sites or site collections within the same tenant.

Checking Subscription Status

- a. After adding a **List Collection Web part**, the subscription status will be shown on the top of the web part. When the subscription is about to expire within 30 days, the notification message will always show the days left.



- b. To update the subscription status, please click on the notification message, then the License Information dialog will show up.

License Information ✕

Your subscription will expire in 29 days.

Tenant ID: ae586225-a936-4e32-b424-6a57e257cf0c

Site ID: {6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}

Site Url:

Product: List Collection 1.2.5.412 

License Type: Trial

Expiration Date: 05/15/2024 

Click the refresh icon next to the expiration date, the new status will be loaded.

- c. Once your subscription expired, there will be a message notify you.

Your subscription has expired on 3/1/2024.

 New   Actions   Settings 

- d. Please send us (sales@boostsolutions.com) the Site URL/Site ID/Tenant ID to proceed a subscription or renewal.
- e. If you purchase a site (site collection) subscription, the license status will be as follows.
- The license type is Site.

License Information ×

Your subscription will expire in 380 days.

Tenant ID: ae586225-a936-4e32-b424-6a57e257cf0c

Site ID: {6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}

Site Url:

Product: List Collection 1.2.5.412 

License Type: Site

Expiration Date: 05/01/2025 

- f. If you purchase a tenant subscription, the license status will be as this.

The license type is Tenant.

License Information ×

Your subscription will expire in 380 days.

Tenant ID: ae586225-a936-4e32-b424-6a57e257cf0c

Site ID: {6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}

Site Url:

Product: List Collection 1.2.5.412 

License Type: Tenant

Expiration Date: 05/01/2025 