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Introduction

KWizCom SharePoint List Aggregator web part enables you to work with various SharePoint lists and libraries that are located in many different sites and site collections.

It does so by aggregating items from those lists and libraries into a single, easy to use consolidated view.

This User Guide provides all the information you need in order to use the product, after it has been deployed and configured by your SharePoint/Site administrator.
User Guide

Overview

What is the KWizCom List Aggregator web part?
KWizCom’s List Aggregator is a SharePoint web part that aggregates list items from many lists (that may be located in many different sites), into a single consolidated view. This functionality is especially needed in SharePoint because of its deployment structure. A SharePoint deployment is made of many sites and sub sites, each contains lists/libraries with data.

Example:
A typical project management solution implemented in SharePoint, includes a site for each project. Each project site includes lists such as Tasks, Risks, Issues, Milestones, Project documents etc.

Now, as an employee that works in several projects, or as a manager who needs to see the “Big Picture”, they both need a way to query several/all the project sites to retrieve important information such as:

- Show all tasks (from all the project sites) that are assigned to me.
- Show all delayed milestones (from all project sites).
- Show all risks that are due to this month
- Show all documents that require my approval

All the mentioned views above require to run a cross-site query in order to get all relevant items from all project sites.

KWizCom’s List Aggregator web part performs this action of aggregating list/library items from many sites, and renders the aggregated items in a tabular (Grid) view.
Modes of operation
The List Aggregator web part can work in 2 different modes:

1. **“Live” mode**
   In this mode the web part runs the requested aggregation (which is a query) in real time, retrieves the results and displays them to the user.

2. **Cached mode** (Available only in the Professional edition)
   In SharePoint deployments that include a very large number of sites and lists, trying to run the requested aggregations by many users may result in poor response time.
   
   Cached mode enables the web part to connect to a caching service, that periodically runs all the required aggregations in the background, and stores the result in a storage (cache) that is available for web parts to use. This saves the web part a lot of time, and enables displaying the results in much better response time.
List Aggregator web part’s structure

The list aggregator web part displays a grid as displayed in the following screenshot:

The web part includes the following main parts:

1) Export – you can export the aggregator’s content to a PDF document or to Excel spreadsheet, by clicking the requested icon.

2) Paging/navigation – the aggregated items are displayed in pages. You can change the page size (in the screenshot showing a page size of 15), and you can also navigate to the requested page by clicking its number, or by moving between pages by using the arrow icons.

3) View – The view drop-down enables you to change the selected view. Each view presents a pre-defined filtered portion of the aggregated items, and also defines sorting and grouping of the
displayed items. The available views and their settings are configured by the Administrator.

4) Amount of retrieved items – in this part you see which page is displayed, and the total number of retrieved items.

5) This is the main area of the web part, showing a table (grid) with the aggregated items.

6) Cache mode indicator (Professional edition only) – this icon indicates that the current displayed items are taken from a cache and are not the real live data. These cached results are periodically refreshed by a backend service. Also, an end-user can manually refresh the cached results by clicking that icon.
Basic end-user actions

This section describes the additional options available for end users when using the list aggregator web part.

Sorting, filtering data

Sorting by some column is done by simply clicking the requested column:

A second click on the same column will change the sort order from ascending to descending order.

Once the administrator enables the filtering functionality, you will see a filter control above each column as displayed in the screenshot above. Filtering by a column is done by typing a value in the filter control, and then selecting a filtering function by clicking the filter icon. The following screenshot demonstrates a filtering of the displayed task items by the “In Progress” value for the “Status” column:
<table>
<thead>
<tr>
<th>Type</th>
<th>Title</th>
<th>Assigned To</th>
<th>Status</th>
<th>Priority</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="another one" /></td>
<td><img src="image" alt="image" /></td>
<td><img src="image" alt="image" /></td>
<td><img src="image" alt="image" /></td>
<td><img src="image" alt="image" /></td>
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<td><img src="image" alt="image" /></td>
<td><img src="image" alt="image" /></td>
<td><img src="image" alt="image" /></td>
</tr>
</tbody>
</table>
Drag&Drop operations: column reordering, grouping

Once the administrator enables the column reordering and grouping functions, end-users can organize the displayed grid by changing the column order and group the displayed items by some column, simply by drag&drop operations.

Grouping

In the following screenshot, the displayed items have been grouped by the “Status” column by dragging it to the Grouping area at the top zone of the web part (just above the columns):

Column reordering

In order to change column order, simply drag&drop the required column to its new location.
Editing an item in the aggregated view

If editing functionality is enabled by the administrator, you can edit the aggregated items within the List Aggregator web part (you don’t have to leave the page and go to the list where the aggregated item was retrieved from – this saves a lot of time!).

To edit an item, click the edit icon shown in the screenshot below:

Once you click it, an Edit form will be displayed. Edit the item and click “Save” to save your changes.

Viewing an items properties in the aggregated view

If View properties functionality is enabled by the administrator, you can view the aggregated items properties within the List Aggregator web part.

This ability was introduced for aggregation of documents, clicking on a document name in the web part open the document itself, now you also have the option to view the documents properties.

To View an items properties, click the View icon shown in the screenshot below:
**Working in cached mode**

The List Aggregator web part can work in 2 modes, depending on how it was configured by the administrator:

- **Live mode** – in this mode data is retrieved from lists in real time.
- **Cached mode** – list items are periodically aggregated by a server job and saved in a fast access repository (Cache). The List Aggregator web part gets the data from that cache instead of running the aggregation query in real-time.

Cache mode is required when there’s a lot of data to aggregate and many lists/sites. Working in this mode enables getting the aggregated data and displaying it to users in a much faster response time, with less load on the SharePoint server/s.

When the List Aggregator web part is configured to work in Cached mode, you will see the Cache mode indicator icon at the top-right area of the web part:
The cache mode indicator displays different icons, depending on the current state of the displayed cached data.

The following table presents the various icons and what each of them means:

<table>
<thead>
<tr>
<th>Status</th>
<th>Cache mode indicator</th>
<th>Cache mode indicator</th>
<th>Web part display</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caching service not available</td>
<td>🔄 (in red color)</td>
<td>The web part cannot connect to the caching service. Please contact your sys administrator.</td>
<td>Empty with the same error message</td>
<td>In this status the list aggregator web part is not able to connect to the caching service and cannot displayed the cached data.</td>
</tr>
<tr>
<td>Normal (cached data displayed)</td>
<td>🔄 Green</td>
<td>Cached results from [date &amp; time]</td>
<td>Cached results</td>
<td>Cached data displayed</td>
</tr>
<tr>
<td>Normal + clickable</td>
<td>🔄 Green</td>
<td>Cached results from [date &amp; time]</td>
<td>Cached results</td>
<td>The icon is clickable, when clicking it a request is sent to the caching service to refresh the cache.</td>
</tr>
<tr>
<td>Normal + manual cache refresh request queued</td>
<td>🔄 (Yellow, rotating slowly)</td>
<td>&quot;This view is queued to be collected in the background.&quot;</td>
<td>Cached results</td>
<td>Cached data is displayed, and the manual request for cache refresh has been queued.</td>
</tr>
<tr>
<td>Normal + Cache being refreshed</td>
<td>🔄 (Green, rotating slowly)</td>
<td>Cached results from [date &amp; time]</td>
<td>Cached results</td>
<td>Cached data is displayed, and currently a new cache is being created in the background.(this indication will show after a manual request was marked in the rule's item)</td>
</tr>
<tr>
<td>Status</td>
<td>Description</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Normal + newer cache available                                        | Slowly blinking ![image](image)  
Cached results from [date & time]  
New cache is available, click to refresh your display.  
Cached results  
Old cached data is displayed, and a newer cache is available. |
| Cache not ready + Cache being refreshed                                | Results are being collected in the background.  
Please try again soon  
Empty display with the same message  
The 1st cache was not created yet by the job, but there is a positive indication that the cache is being created. |
| Cache not ready + manual cache refresh request queued                  | This view is queued to be collected in the background.  
Please try again soon.  
Empty display with the same message  
The 1st cache was not created yet by the job, but there is a positive indication that the cache is being created. |

When you work with the List Aggregator web part in cached mode, it means that you are viewing cached data, which may not be fully up to date due to recent changes.

The caching data is periodically refreshed, according to the configurations made by the administrator. However, you can manually refresh the cach if you need to view the most updated data. Manually refreshing the cach is done by simply clicking the Cache mode indicator icon. Once you click it, it will start rotate and when you hover over it you will see the exact status of your manual cache refresh request. When a new updated cache is available, the indicator icon will blink; click it to refresh the web part’s display with te new updated cache results.
FAQ

What does the List Aggregator do?
KWizCom List Aggregator web part enables you to run cross-site and cross site collection queries, and display the result in a single consolidated view. This enables you to gather information from multiple sites and created functional views such as: "Open issues from all project sites", "All active announcements", "Latest press-releases from all sub sites", "Most rated blog posts of the week" etc.

What type of SharePoint installation is needed for this web part to work?

Do I have to install anything on my company's client-PCs?
No. The KWizCom SharePoint Multiple Drop-Down Filter Web Part is a server installation. Once installed on the server, it can be used from any client-PC connected to it.