

List Rollup

SharePoint's Automated Team Player



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Introduction

List Rollup is a data aggregation engine that works manually or automatically across SharePoint® sites and site collections, enabling you to group, edit, analyze and present data from anywhere in SharePoint for continually comprehensive, up-to-date information.

And if that's not enough, when combined with other Bamboo® solutions, it becomes a powerhouse tool that minimizes time-consuming daily tasks, stops the endless data chase and keeps teams on the same page, effortlessly.

Written by Lindsay Bergstrom, Bamboo's Director of Finance and Operations, this eBook not only gives in-depth details about List Rollup and the solutions it combines seamlessly with, but also presents Lindsay's personal experiences using these combinations to ease her own workload.

As Lindsay herself explained: "If it wasn't for List Rollup and its ability to combine with other critical SharePoint solutions, I wouldn't have had time to write this eBook!"





List Rollup + Calendar Plus

**Have You Made
Your Date with
List Rollup Yet?**

List Rollup is a content aggregation tool that allows you to combine list data from anywhere in SharePoint. This product is the definition of collaboration when it comes to SharePoint - but it doesn't stop as a standalone product. List Rollup allows you to [connect](#) quickly and easily to a number of Bamboo Web Parts, letting you use aggregated list data in calendars, charts, and more. I'm going to start with List Rollup and [Calendar Plus](#).

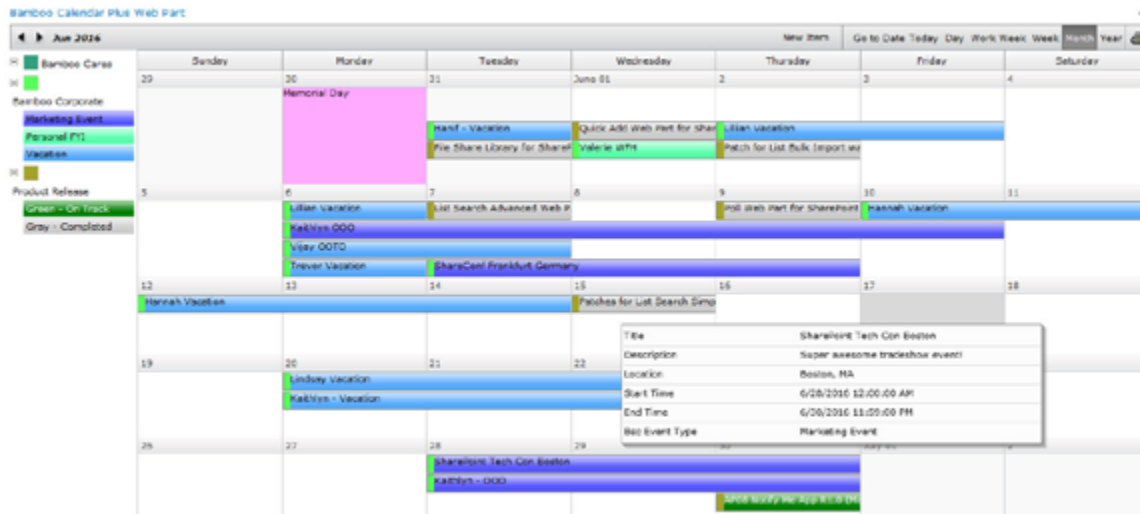
If you have ever seen our [Calendar Plus](#) web part, you may have noticed the immediate difference to out-of-the-box SharePoint calendars. Some of the top features include the ability to color-code your items by category (or any column in your list, really), a configurable tooltip that allows you to show as little or as much data right on the calendar (eliminating the need for an extra click), and the ability to easily navigate right back to the calendar page when you close out of an item form (seriously, SharePoint, why?). These features alone make a compelling case to show immediate ROI on an intuitive web part such as Calendar Plus.

But when you put List Rollup and Calendar Plus together, even more amazing things can happen:

- 1 You can “rollup” lists that have been aggregated across sites and site collections and display that information in one, single, beautiful, color-coded calendar
- 2 You can bypass the 10 list limit in SharePoint by displaying a list rollup list that has aggregated data from across as many lists as you need
- 3 Using List Rollup's auto-discovery feature, you can configure the list to automatically add newly created lists that fit the criteria straight to Calendar Plus, making it virtually a maintenance-free calendar after initial setup
- 4 You can also set the filter controls on auto-discovery to only include lists of a specific type and/or location if you so choose

I rely on this powerful combination every day at work on our corporate portal. We're a tight knit group here at Bamboo, but I can't say that we want full access to everyone's business all the time, so asking all of my colleagues

to share their Outlook calendars with me would be overkill. Instead, we've streamlined the calendar on our Corporate portal to show the relevant people all of the relevant data, and not all the other "junk". Here it is, folks, welcome to the world of Bamboo!



Connecting our calendar to a List Rollup list, we have aggregated event lists from our HR site, our Marketing site, and our Engineering site to display on one corporate calendar. This shows items from our corporate events list, marketing tradeshow list, our product release list, our corporate holiday list, our scheduled vacation list, all in one place, with a simple legend explaining the colors and categories.

So now, before I'm ready to set a timeline for a new project that will involve multiple stakeholders, I first consult this calendar to make sure that

- a) my team members aren't out on vacation or at a trade show
- b) that we don't have a large product release scheduled that I know will take away some key resources
- c) that I'm not supposed to be planning a trip home to visit the family, because I forgot that we had a three-day weekend!

If you too can see the value of this dynamic duo for your organization, my suggestion is to download your free trials of [Calendar Plus](#) and [List Rollup](#) today, and see for yourself how easy it is to get organized!



List Rollup + Chart Plus

Why List Rollup's Data Capabilities Are Off the Charts (And On Them!)

If you aren't familiar with our [Chart Plus](#) web part, it offers a wide range of interactive charts and reports for use across your entire organization.

With interactive features such as selectable legends, hover-over tooltips, and runtime filtering, Chart Plus is the ultimate product for reporting in SharePoint. Here's a quick example of some of the charts that can be set up in a matter of minutes:

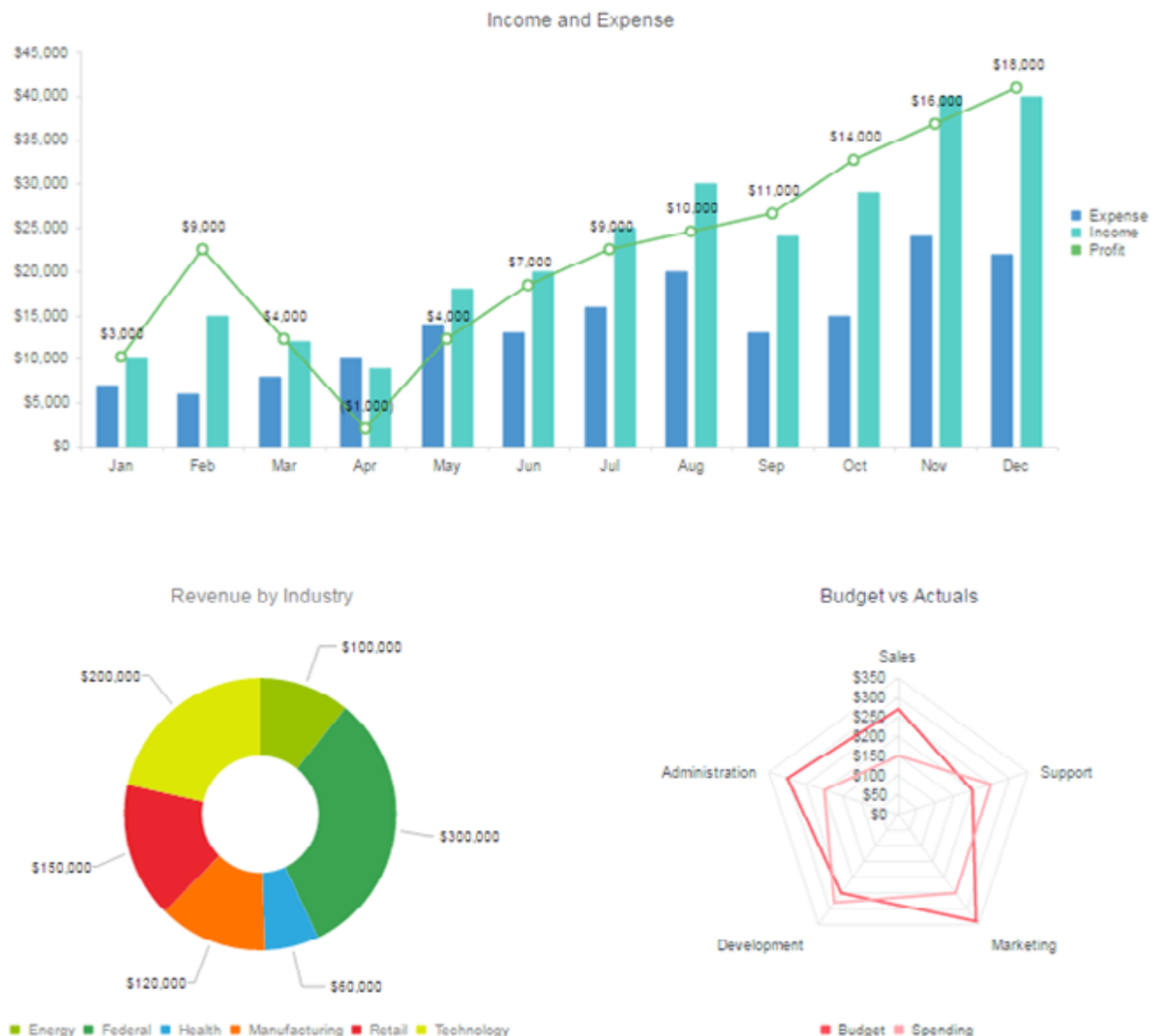


Chart Plus deserves a page to itself, but here I want to show you the power behind the scenes - connecting Chart Plus with List Rollup. Chart Plus alone can connect to multiple data sources, but can only connect to one source at

a time. If that doesn't quite cut the mustard for your organization's needs, we have an answer for that! When paired with List Rollup, you can also:

- Chart data aggregated from across sites and site collections
- Automatically add data from newly created lists to Chart Plus
- Filter to only include lists of a specific type and/or location

This opens up a whole new world of possibilities in SharePoint charting. For example, we use this combination internally when it comes to our annual budget. Each department manager is responsible for creating and maintaining a departmental budget. These budgets are housed on each department site within our portal. Since I am in charge of the overall company budget, I'd much prefer to see these all in one view. All I have to do is create an aggregated list using List Rollup, pulling in the cost items from each department site, then connect that aggregated list to Chart Plus, and BAM! just like that, I have a chart showing the full company budget by department.

Even better, I have configured List Rollup to auto-discover any new lists created using certain criteria, so even though I set this chart up before all departments had their budgets finalized, once those were loaded into the portal, List Rollup automatically added them to my list, and Chart Plus updated to pull in the new data. That way I don't have to go to each department site to see when the data is available - I can rest assured knowing that as soon as it's in the portal, it will also show in my aggregated, company-wide budget chart. Talk about efficiency! Now, I'd show you a copy of this chart, but the powers that be may not be happy with me airing our financial data out to the world, so I'll let your imagination run on this one. And don't worry, List Rollup includes Security Trimming, so anyone that shouldn't see this type of data, won't.

To try List Rollup, Chart Plus, or any other products we are highlighting, check out our [Free Trials page](#), and download your copy today!



List Rollup + Alert Plus

Alerting You to the Combined Power of Alert Plus and List Rollup

Let's get straight to another perfect pairing that needs to be highlighted: List Rollup and [Alert Plus](#).

Quick recap: List Rollup rolls up lists. *Mind Blown* Up to speed? Great.

What does Alert Plus do? Wait for it... Alerts! Ok, that's not quite doing this product justice. Alert Plus sends customized, conditional alerts and reminders based on triggers the users set from data in SharePoint. Triggers such as created, modified, or deleted dates of list items. On top of that, you can completely customize the alert email that is received or use alerts to trigger a workflow. The possibilities are endless.

But with the power of Alert Plus combined with the aggregation power of List Rollup, you can also:

- 1** Set up one single alert to trigger alerts on lists aggregated across multiple sites and site collections, meaning one alert configuration TOTAL, not one per site
- 2** Automatically alert on newly created lists using List Rollup's auto-discovery feature. This ensures that your Alert is always relevant and takes away the hassle of remembering to re-configure your alert each time new data is added to SharePoint
- 3** Filter to only alert on lists of a specific type and/or location so that your alerts are always relevant and meaningful

Let me walk you through another one of my personal use cases here at Bamboo.

We have our corporate calendar (which also uses List Rollup, see above), which gives us a pretty slick view of what's going on at Bamboo. I rely on this a lot to see when employees are out of the office, whether for vacation, a tradeshow, or a client demo. It's great to pop into the portal and see if/when someone is around, but why go to the data when the data can come to you?

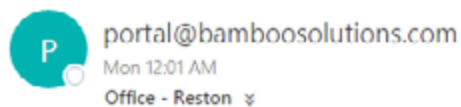
Enter Alert Plus.

Instead, our HR Manager set up a weekly summary Alert Email that sends

an email to the entire company every Monday morning. This email is an alert triggered off the aggregated List Rollup list that also connects to our corporate calendar. It has parameters that only include the 'Event' content type list items for the current week. That way it will automatically pull events from multiple lists across different department sites, to ensure it gives a full view of who will be out of the office, and for how long. This is perfect for me to see before setting up my weekly meeting schedule (you don't even want to see that craziness.)

Here is what our alert email looks like, completely customized to show only the data we care to see:

REMINDER: The following Bamboo events are coming up this week!



Title: Valerie
Event Type: Personal FYI
Start: 5/16/2016 8:00 AM
End: 5/16/2016 10:00 AM
<https://portal.bamboosolutions.com/calendar/Lists/Bamboo Master Events/DispForm.aspx?ID=4178>

Title: Jen - Vacation
Event Type: Vacation
Start: 5/18/2016 12:00 AM
End: 5/20/2016 11:59 PM
<https://portal.bamboosolutions.com/calendar/Lists/Bamboo Master Events/DispForm.aspx?ID=4139>

Title: Trevor Vacation
Event Type: Vacation
Start: 5/18/2016 8:00 AM
End: 5/20/2016 5:00 PM
<https://portal.bamboosolutions.com/calendar/Lists/Bamboo Master Events/DispForm.aspx?ID=4177>

Title: Bruno Vacation
Event Type: Vacation
Start: 5/20/2016 12:00 AM
End: 5/20/2016 11:59 PM
<https://portal.bamboosolutions.com/calendar/Lists/Bamboo Master Events/DispForm.aspx?ID=4160>

So there you have it, folks. Productivity, and a little reminder, all rolled up into one pretty package. Download your [free trials](#), [contact your account manager](#), and get started right away.



List Rollup + Data-Viewer

List Rollup Goes On Display in Our Final Segment

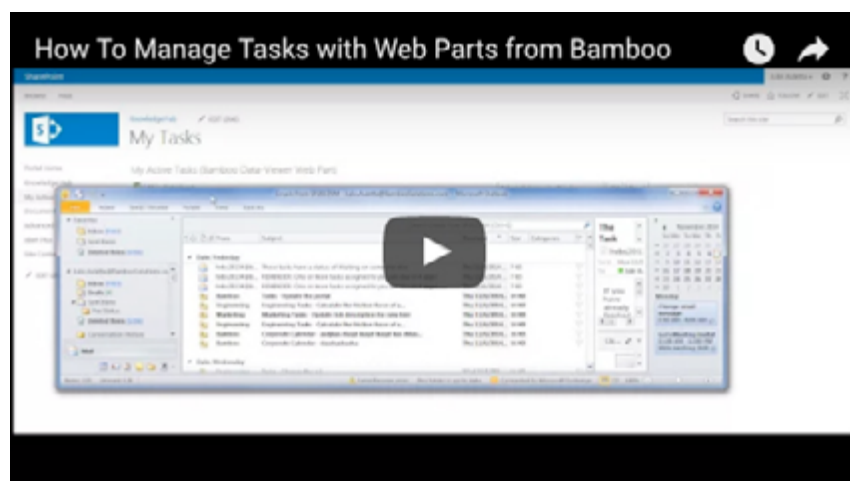
List Rollup boasts extremely powerful features as a content aggregation tool that allows you to combine list data from anywhere in SharePoint. But once you aggregate the data, how do you display it? With [Data-Viewer](#) of course! This leads me to our final product pairing showcase.

Data-Viewer allows you to create intelligent grid views for effective data analysis on a variety of data sources, including SharePoint Lists, SQL Server Tables/Views, and Business Connectivity Services. One of the other data sources it will connect to is List Rollup - imagine that! When combined, the product pairing opens up additional functionality to allow you to:

- Analyze aggregated data from across sites and site collections
- Automatically add data from newly created lists to Data-Viewer
- Filter to only include lists of a specific type and/or location

Our Solutions Director, Julie, paints a perfect picture of a simple, but extremely important use case that benefits from these two products. She takes a common issue within SharePoint - keeping track of tasks assigned to you across multiple sites within your SharePoint portal - and shows you how to set up a single view with Data-Viewer, pulling “My Active Tasks” from multiple lists across multiple sites using List Rollup. This is a great combo to help with user adoption, and more so for self-organization and productivity. Julie’s video takes it a step further and also connects our Alert Plus web part (see above), to bring customized alerts on that aggregated List view straight to the end user. The possibilities are endless!

Check it out:



I hope you've enjoyed this eBook. We've covered a lot, and UNcovered a lot as well. To recap, our List Rollup web part integrates with other powerful Bamboo tools such as [Calendar Plus](#), [Chart Plus](#), [Alert Plus](#), and finally [Data-Viewer](#). I encourage you to test out all of these products, absolutely free, by going [here](#). Or, if you're ready to really dive in, [contact](#) one of our account managers to set up a personal demo right away.

We're proud of these products, and we are confident you will see why.

Start Your Free Trial



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