



Solutions for Information Workers

# **Websio List Ticker and Aggregator for MOSS 2007 User Guide**

Websio Information Solutions Ltd

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## About Websio List Ticker and Aggregator Web Part

Websio List Ticker and Aggregator Web Part displays aggregated data from multiple lists/sites as scrolled marquee



The Web Part supports:

1. Simple and advanced mode
2. Single or multiple list aggregation
3. Filter items by specified field
4. Filter by Audience
5. Sort by specified field
6. List types and content types
7. Rich text fields
8. Search scopes:
  - a. Current site only
  - b. Current site and all sub-sites
  - c. Entire site collection

# Installation

## Software Requirements

### Server Requirements

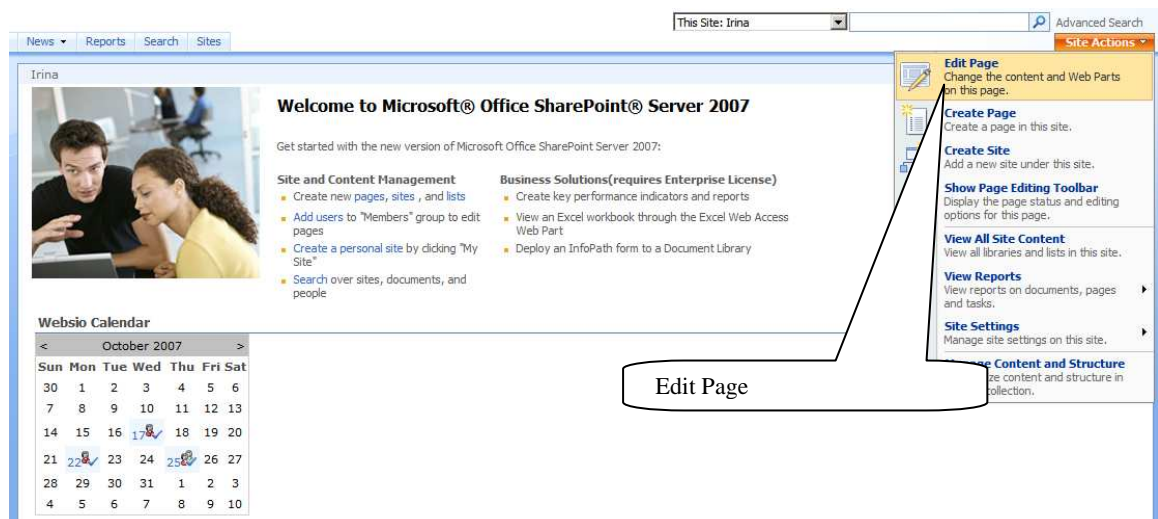
- Microsoft Office SharePoint Server 2007 (MOSS 2007)

### Client Requirements

- Microsoft Internet Explorer 6.0+

## Installation Steps

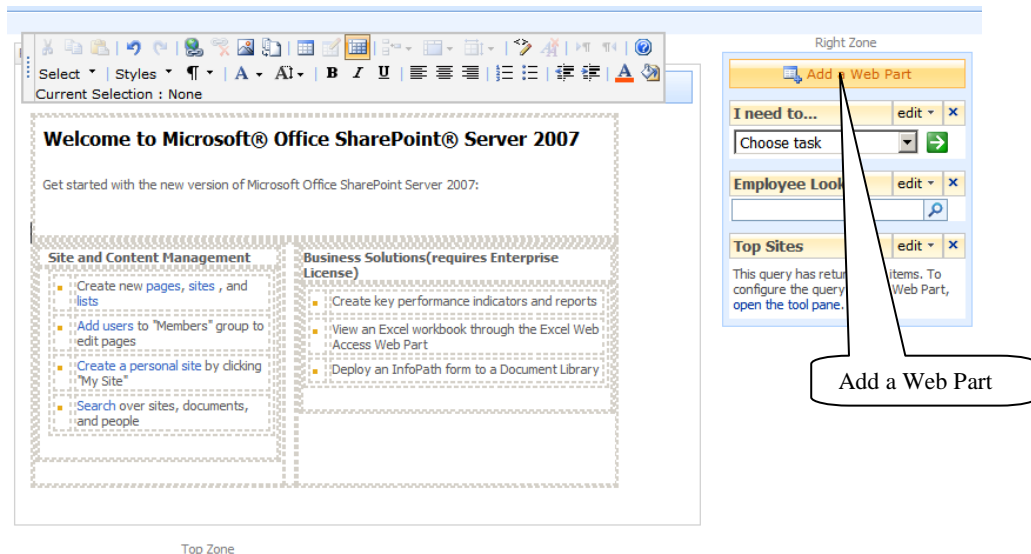
1. Unzip the TickerAggregator.zip file on your MOSS server.
2. Double-click the ListTickerSetup.msi file in order to begin the installation wizard.
3. Restart Internet Information Server (iisreset /noforce).
4. After installation is complete open site where you are going to use the Web Part.
5. Open "Site actions" menu and select option "Edit Page"



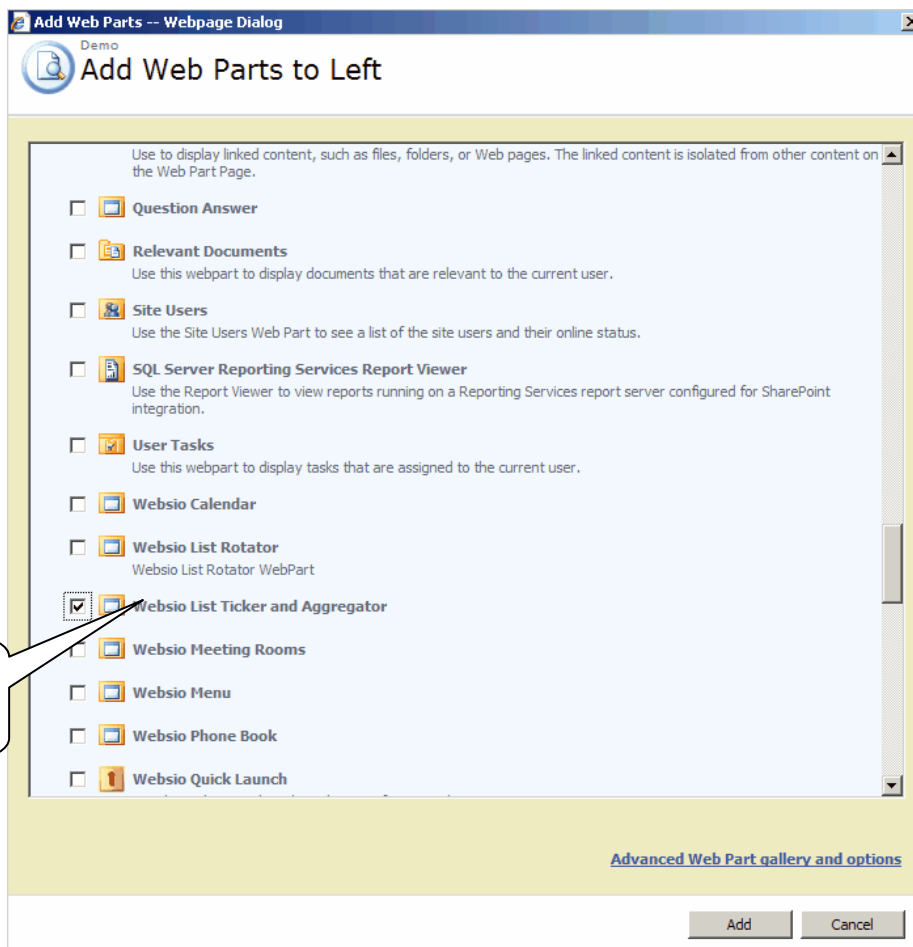
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### 6. In the Site Settings window select option "Add a Web Part"



In the new opened window find "Websio List Ticker and Aggregator" and click "Add".

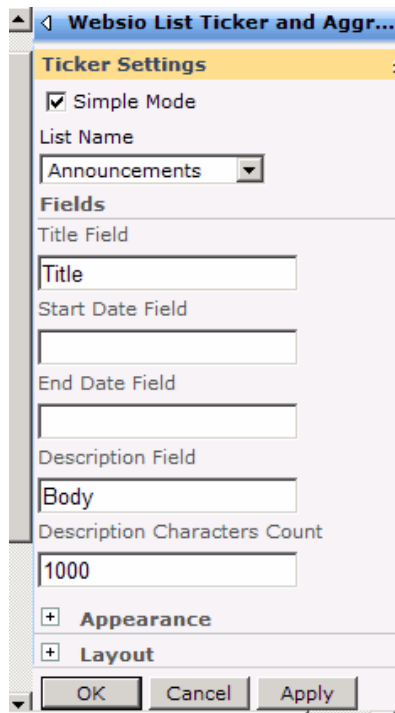


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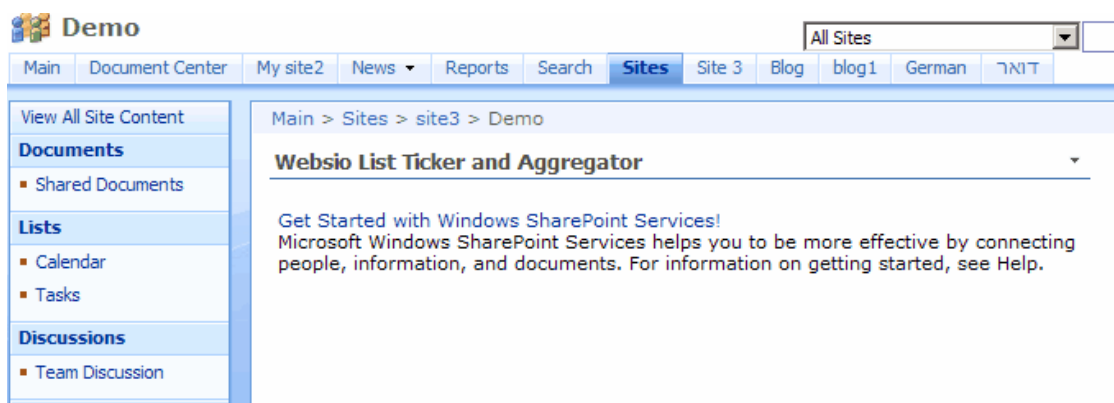
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### Quick Start

1. Create Team Site and add Websio List Ticker and Aggregator to the main page.
2. Open Web Part Properties Window
3. Set properties as shown on the picture



4. Press "OK"
5. You'll see demo record scrolling

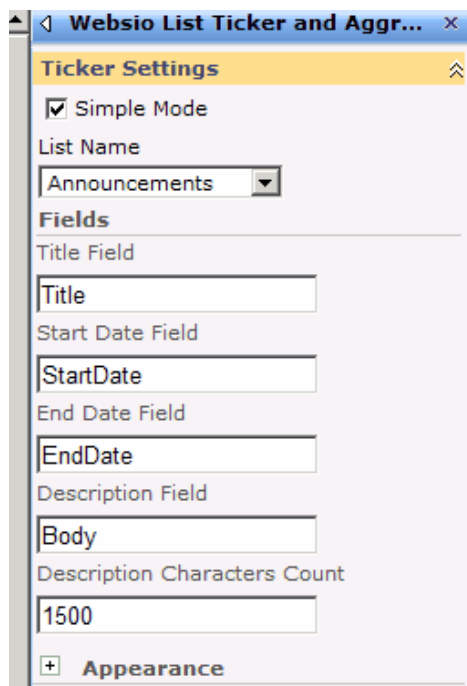


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### Simple Mode

1. In this mode you can display items from single list without aggregation.
2. To switch the Web Part to this mode, select check box "Simple Mode" as shown below.



### 3. Simple Mode Properties

#	Property Name	Description
1	List Name	Displays all lists from the current site. The Web Part scrolls items from the selected list
2	Title Field	Title Field Name. Shown as link to the item.
3	Start Date Field	Field to show as item start date.
4	End Date Field	Field to show as item start date
5	Description Field	Description Field Name. Field Type may be simple or rich text.
6	Description Characters Count	Defines how many characters of Description will be displayed.

### 4. Appearance Examples:

4.1. In this section we'll use the next single item to scroll:

#### Announcements: Kung Fu Panda

[Close](#)

[New Item](#) | [Edit Item](#) | [Delete Item](#) | [Manage Permissions](#) | [Alert Me](#)

<b>Title</b>	Kung Fu Panda
<b>Body</b>	<div style="text-align: center;">  </div> <p>Prepare for awesomeness' this summer as you become aKung Fu master with the release of the Kung Fu Panda™ video game on June 27.</p>
<b>Expires</b>	
<b>Start Date</b>	6/1/2008
<b>End Date</b>	6/20/2008

4.2. Example 1. All Field Properties are defined:

Start Date


Description

**Webzio List Ticker and Aggregator**

6/1/2008-6/20/2008

End Date

Title



Prepare for awesomeness' this summer as you become aKung Fu master with the release of the Kung Fu Panda™ video game on June 27.



### 4.3. End Date Field isn't defined:

#### Webzio List Ticker and Aggregator

6/1/2008

Kung Fu Panda



Prepare for awesomeness' this summer as you become a Kung Fu master with the release of the Kung Fu Panda™ video game on June 27.

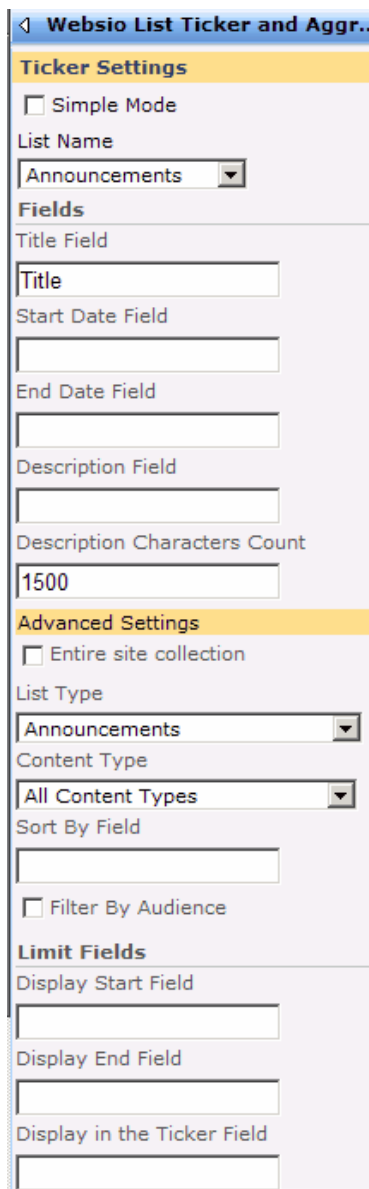
### 4.4. Only Title Field is defined:

#### Webzio List Ticker and Aggregator

Kung Fu Panda

### Advanced Mode

1. In this mode you can aggregate data from different lists and sites in the same site collection. You can define which items to show and when.
2. To switch to Advanced Mode uncheck option "Simple Mode" as shown below. Advanced section will appear.



**Webzio List Ticker and Aggr..**

**Ticker Settings**

☐ Simple Mode

List Name  
Announcements

**Fields**

Title Field  
Title

Start Date Field

End Date Field

Description Field

Description Characters Count  
1500

**Advanced Settings**

☐ Entire site collection

List Type  
Announcements

Content Type  
All Content Types

Sort By Field

☐ Filter By Audience

**Limit Fields**

Display Start Field

Display End Field

Display in the Ticker Field

### 3. Advanced Mode Properties

#	Property Name	Description
1	List Name	Displays all lists from the current site. The Web Part scrolls items from the selected list
2	Title Field	Title Field Name. Shown as link to the item.
3	Start Date Field	Field to show as item start date. The field must be of type "Date and Time".
4	End Date Field	Field to show as item start date. The field must be of type "Date and Time".
5	Description Field	Description Field Name. Field Type may be simple or rich text.
6	Description Characters Count	Defines how many characters of Description will be displayed.
7	Entire site collection	Defines Web Part search scope: <ul style="list-style-type: none"> <li>1. Checked - search will be performed on entire site collection</li> <li>2. Unchecked – search will be performed on the current site and all sub-sites. <b>Important! In this case stay property "List Name" unfilled!</b></li> <li>3. To show items from the current site only set List Name property to your List Name</li> </ul>
8	List type	Defines type of lists from where to collect items
9	Content Type	Defines items content type. If you want to display items of all content types, set this property to "All Content Types"
10	Sort By Field	Defines sort order of displayed items
11	Filter By Audience	Select this property to filter items by audience
12	Display Start Field	If this property is set, only items with date

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		value saved in this field equal or greater than today will be shown. The field must be of type "Date and Time".
13	Display End Field	If this property is set, only items with date value saved in this field equal or less than today will be shown. The field must be of type "Date and Time".
14	Display in the Ticker Field	If this property is set, only items with value "Yes" (checked) saved in this field will be displayed. The field must be of type "Yes/No (check box) ".

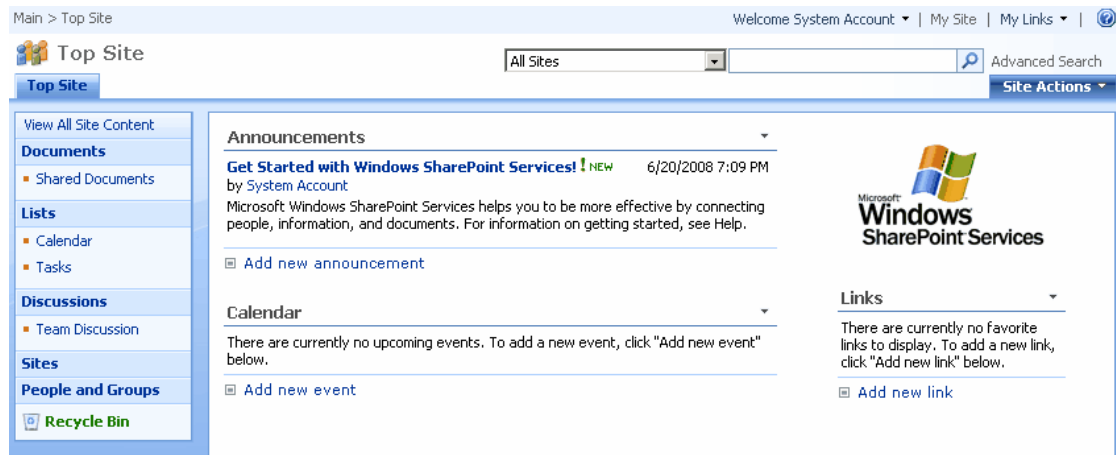
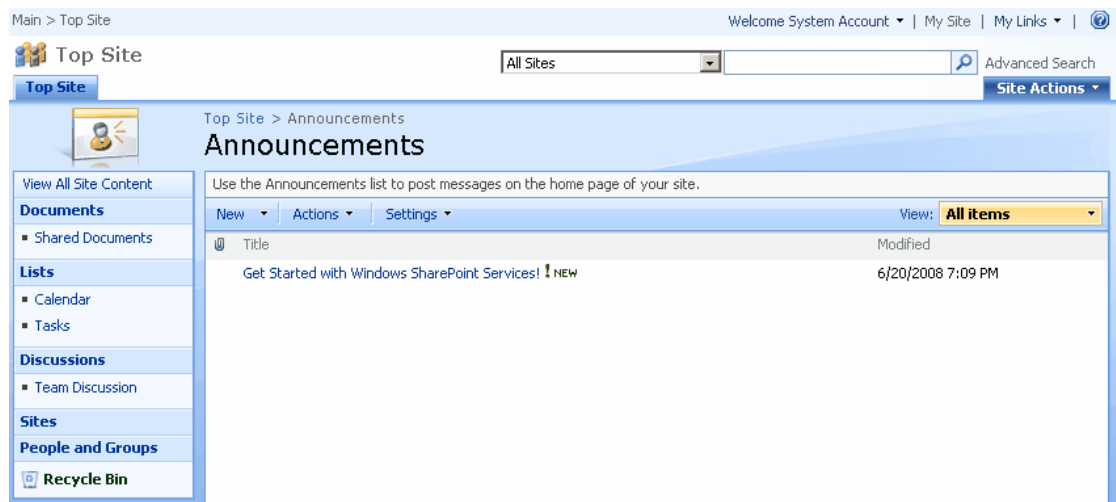
### 4. Search Scopes

- 4.1. Current Site. To display items from the current site set value of "List Name" property to source list name
- 4.2. Current Site and all sub sites. Clear property "List Name" and define which items to show combining properties "List Type" and "Content Type"
- 4.3. Entire Site Collection. Select property "Entire site collection" and define which items to show combining properties "List Type" and "Content Type"

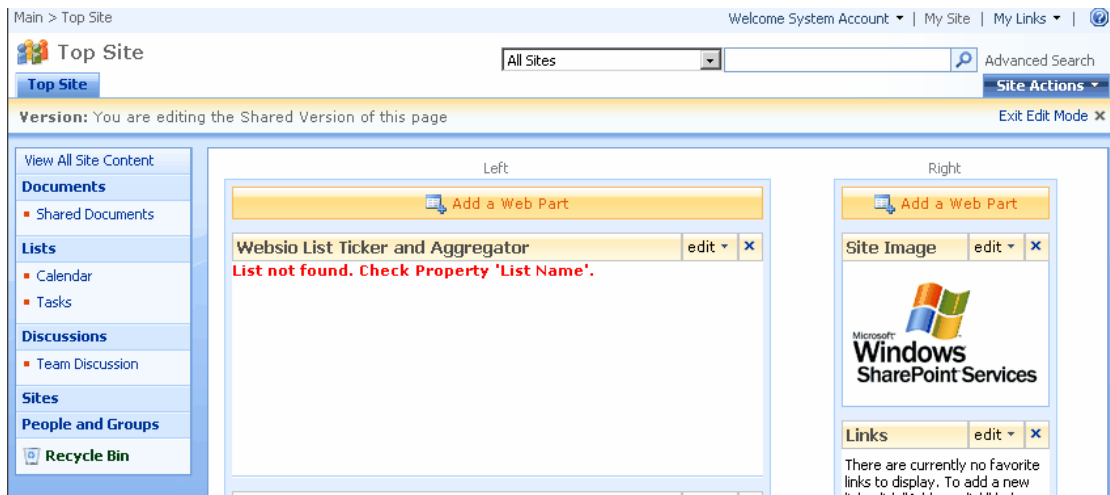
### Examples

### Single List Scrolling – Simple Mode

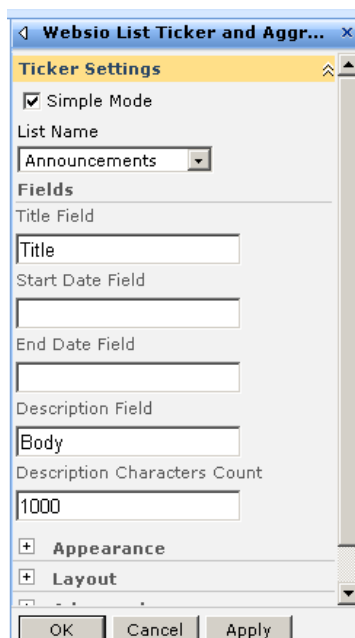
1. For this example we use Team Site called "Top Site" and standard Announcements list.

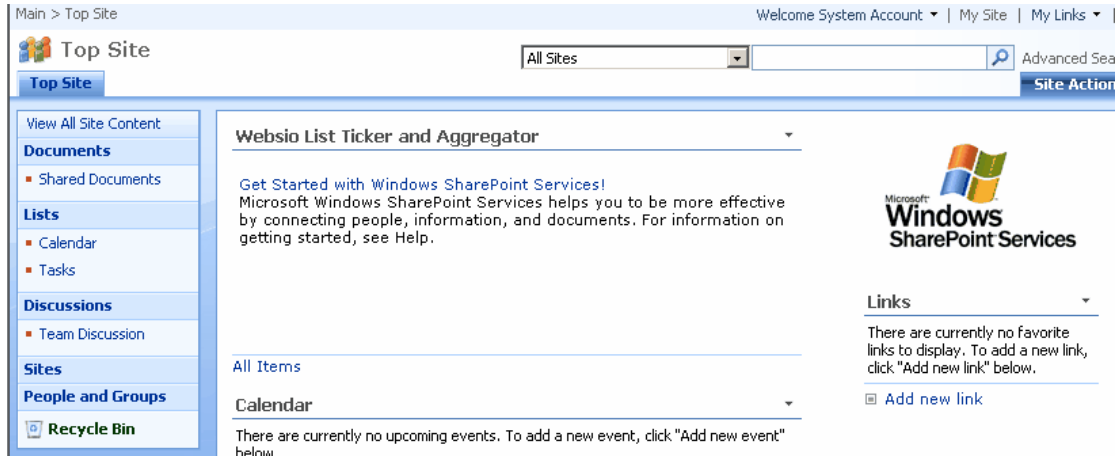
- Place "Websio List Ticker and Aggregator" Web Part on the main page.  
See section "Installation" for detailed instructions how to install the Web Part.



- Set Web Part Properties as shown below and press "OK"



- You'll see items from "Announcements" list scrolled

















## Single List Scrolling – Additional fields, Filters and Sorting

- Open "Announcement" list settings and add properties as shown on the next picture:

Columns		
A column stores information about each item in the list. The following columns are currently available in this list:		
Column (click to edit)	Type	Required
Title	Single line of text	✓
Body	Multiple lines of text	
Expires	Date and Time	
Event Start Date	Date and Time	
Event End Date	Date and Time	
Display From Date	Date and Time	
Display In Ticker	Yes/No	
Created By	Person or Group	
Modified By	Person or Group	

2. Add two items to the list:

  <span style="float: right;">* indicates a required field</span>	
<b>Title *</b>	Future Event
<b>Body</b>	<div>  </div> <div>           Description of future event         </div>
<b>Expires</b>	6/26/2008 
<b>Event Start Date</b>	6/24/2008 
<b>Event End Date</b>	6/25/2008 
<b>Display From Date</b>	6/12/2008 
<b>Display In Ticker</b>	<input checked="" type="checkbox"/>

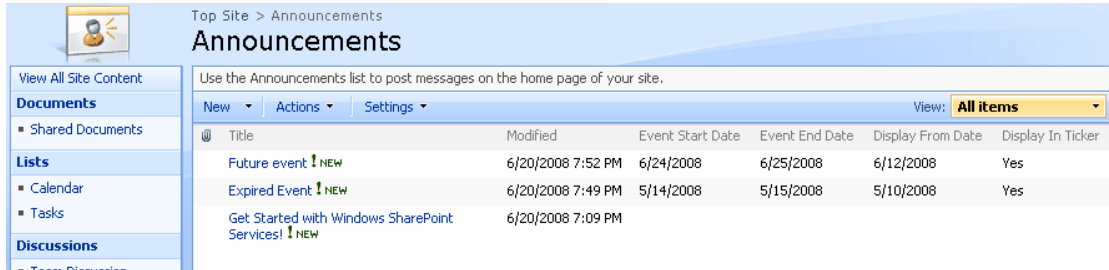
  <span style="float: right;">* indicates a required field</span>	
<b>Title *</b>	Expired Event
<b>Body</b>	<div>  </div> <div>           Description of expired event         </div>
<b>Expires</b>	5/16/2008 
<b>Event Start Date</b>	5/14/2008 
<b>Event End Date</b>	5/15/2008 
<b>Display From Date</b>	5/10/2008 
<b>Display In Ticker</b>	<input checked="" type="checkbox"/>

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3. We received Announcements list with 3 items:



Top Site > Announcements

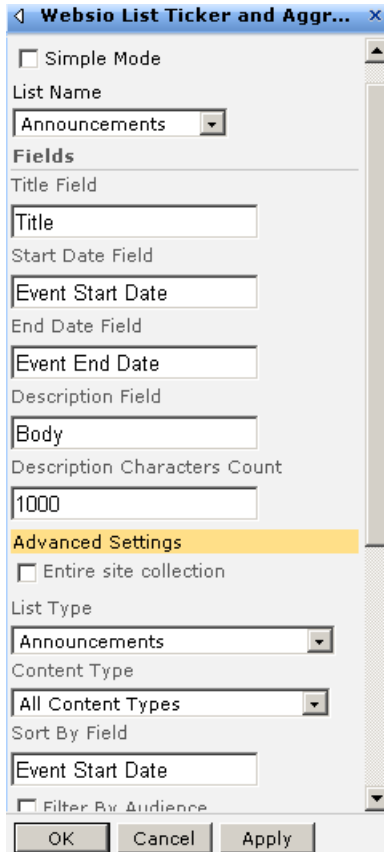
**Announcements**

Use the Announcements list to post messages on the home page of your site.

New Actions Settings View: **All items**

Title	Modified	Event Start Date	Event End Date	Display From Date	Display In Ticker
Future event <b>NEW</b>	6/20/2008 7:52 PM	6/24/2008	6/25/2008	6/12/2008	Yes
Expired Event <b>NEW</b>	6/20/2008 7:49 PM	5/14/2008	5/15/2008	5/10/2008	Yes
Get Started with Windows SharePoint Services! <b>NEW</b>	6/20/2008 7:09 PM				

4. Set Web Part properties as shown on the next picture:



**Websio List Ticker and Aggr...**

☐ Simple Mode

List Name: **Announcements**

**Fields**

Title Field: **Title**

Start Date Field: **Event Start Date**

End Date Field: **Event End Date**

Description Field: **Body**

Description Characters Count: **1000**

**Advanced Settings**

☐ Entire site collection

List Type: **Announcements**

Content Type: **All Content Types**

Sort By Field: **Event Start Date**

☐ Filter By Audience

OK Cancel Apply

5. Return to the page with our Web Part and you'll see all three items scrolled and sorted by "Event Start Date".
6. Now set property "Display in the Ticker Field" to value "Display in Ticker". List Ticker and Aggregator will show only items with field "Display in Ticker" set to "Yes".

- To display actual items only, set properties as shown below

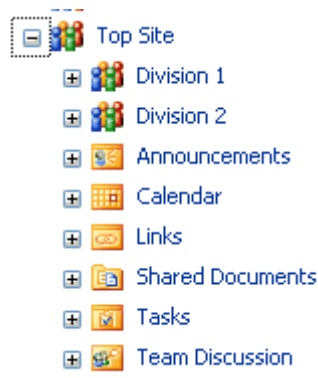
Limit Fields
Display Start Field
Display From Date
Display End Field
Expires
Display in the Ticker Field

### ***Enterprise level solution***

**Introduction:** We have enterprise web site and sub-site for each division.

**Task:** enable to each division to manage its own list of news and propagate selected items to the top-level site (enterprise web site).

- In this example we use sites hierarchy as shown below:



- First, we'll create Content Type for our news. Open Top Site settings and go to "Site Content Type Gallery"

### 3. Press "Create" and set properties as shown:

#### New Site Content Type

Use this page to create a new site content type. Settings on this content type are initially copied from the parent content type, and future updates to the parent may overwrite settings on this type.

##### Name and Description

Type a name and description for this content type. The description will be shown on the new button.

Name:

Description:

Parent Content Type:

Select parent content type from:

List Content Types

Parent Content Type:

Item

Description:

Create a new list item.

##### Group

Specify a site content type group. Categorizing content types into groups will make it easier for users to find them.

Put this site content type into:

☒ Existing group:

Custom Content Types

☐ New group:

OK

Cancel

### 4. Add columns to "Enterprise News" Content Type

#	Field Name	Type
1	Title	Single line of text
2	Expires at	Date and Time
3	News Description	Multiple lines of text
4	Show on division site	Yes/No
5	Show on enterprise site	Yes/No

#### Columns

Name	Type	Status	Source
Title	Single line of text	Required	Item
Expires at	Date and Time	Optional	
News Description	Multiple lines of text	Optional	
Show on division site	Yes/No	Optional	
Show on enterprise site	Yes/No	Optional	

☐ Add from existing site columns

☐ Add from new site column

☐ Column order

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- Open "Division 1" site and create new custom list "News"

Division 1 > Create > New

### New

**Name and Description**


Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this list.

Name:

Description:

**Navigation**

Specify whether a link to this list appears in the Quick Launch.

 Display this list on the Quick Launch?
 ☒ Yes ☐ No

Create Cancel

- Open "News" list settings and select "Advanced Settings"
- In the opened window set option "Allow management of content types?" to "Yes" and press "OK"

Division 1 > News > Settings > Advanced Settings

### List Advanced Settings: News

**Content Types**

Specify whether to allow the management of content types on this list. Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors.

Allow management of content types?

☒ Yes ☐ No

**Item-level Permissions**

Specify which items users can read and edit.

**Note:** Users with the Manage Lists permission can read and edit all items. [Learn about managing](#)

**Read access:** Specify which items users can read

☒ All items ☐ Only their own

**Edit access:** Specify which items users can edit

☒ All items

8. Now you can see new section "Content Types" in the list settings window.  
Press link "Add from existing site content types"



Division 1 > News > Settings

### Customize News

**List Information**

Name: News  
Web Address: http://vmmps2007:8080/topsite/division1/Lists/News/AllItems.aspx  
Description:

**General Settings**

- [Title, description and navigation](#)
- [Versioning settings](#)
- [Advanced settings](#)
- [Audience targeting settings](#)

**Permissions and Management**

- [Delete this list](#)
- [Save list as template](#)
- [Permissions for this list](#)
- [Workflow settings](#)
- [Information management policy settings](#)

**Communications**

- [RSS settings](#)

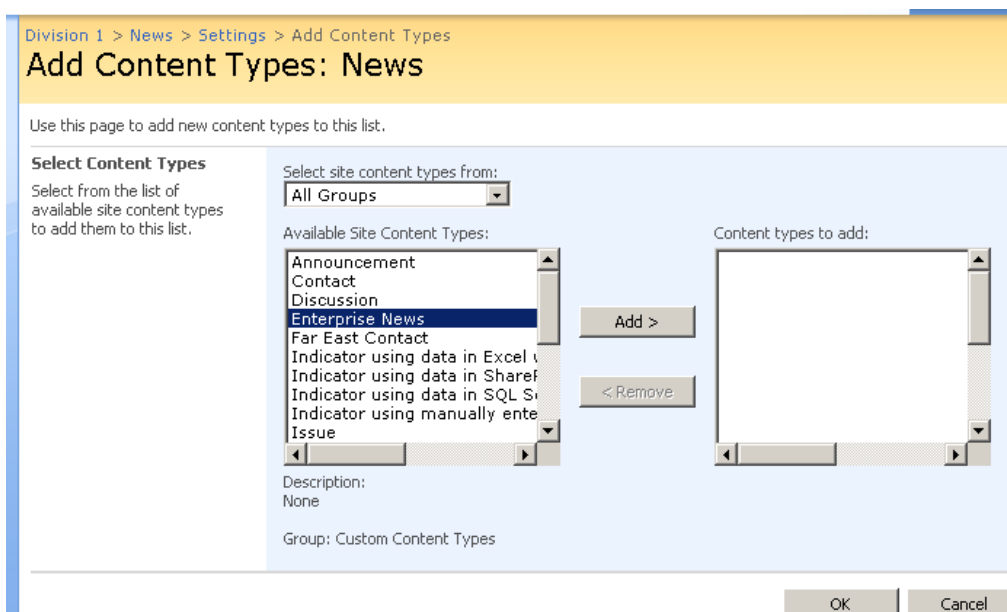
**Content Types**

This list is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types are currently available in this list:

Content Type	Visible on New Button	Default Content Type
Item	✓	✓

- [Add from existing site content types](#)
- [Change new button order and default content type](#)

9. In the new opened window select from Available Site Content Types  
"Enterprise News", press "Add", then press "OK"



Division 1 > News > Settings > Add Content Types

### Add Content Types: News

Use this page to add new content types to this list.

**Select Content Types**

Select from the list of available site content types to add them to this list.

Select site content types from:  
All Groups

Available Site Content Types:

- Announcement
- Contact
- Discussion
- Enterprise News**
- Far East Contact
- Indicator using data in Excel v
- Indicator using data in Sharef
- Indicator using data in SQL S
- Indicator using manually ente
- Issue

Add >

< Remove

Content types to add:

Description:  
None

Group: Custom Content Types

OK Cancel

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10. Now delete from list content types default content type "Item". Click on it, then select option "Delete this content type". Confirm deletion.

### Content Types

This list is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types are currently available in this list:

Content Type	Visible on New Button	Default Content Type
Item	✓	✓
Enterprise News	✓	

Division 1 > News > Settings > List Content Type

### List Content Type: Item

#### List Content Type Information

Name: Item  
Description: Create a new list item.  
Parent: Item

#### Settings

- ▣ Name and description
- ▣ Advanced settings
- ▣ Workflow settings
- ▣ Delete this content type
- ▣ Information management policy settings

#### Columns

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11. Return to the list and add three items as shown below:

11.1. Internal item. Will not be shown in List Ticker and Aggregator

Division 1 > News > New Item

### News: New Item

OK Cancel

Attach File | Spelling... \* indicates a required field

Title \* Internal items

Expires at 7/5/2008

News Description

Test description

Show on division site ☐

Show on enterprise site ☐

OK Cancel

11.2. Division- level item. Will be shown on Division site only.

Division 1 > News > New Item

### News: New Item

OK Cancel

Attach File | Spelling... \* indicates a required field

Title \* Division-level item

Expires at 7/4/2008

News Description

Test 1

Show on division site ☒

Show on enterprise site ☐

OK Cancel

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- 11.3. Enterprise-level item. Will be shown on both Division and Enterprise sites.

Division 1 > News > Enterprise-level item > Edit Item

### News: Enterprise-level item

📎 Attach File | ✕ Delete Item | ABC Spelling...
\* indicates a required field

**Title \***

**Expires at**

**News Description**

test 3

**Show on division site**

☒

**Show on enterprise site**

☒

Created at 6/28/2008 9:30 PM by System Account

Last modified at 6/28/2008 9:30 PM by System Account

12. Open "Division 1" site main page and add "Websio List Ticker and Aggregator" Web Part. See section "Installation" for detailed instructions how to install the Web Part.

13. Open Web Part properties and define them as shown below:

#	Property Name	Value
1	Single Mode	False (unchecked)
2	List Name	Empty
3	Title Field	Title
4	Start Date Field	Created
5	End Date Field	Empty
6	Description Field	News Description
7	Description Characters Count	1000
8	Entire site collection	False (unchecked)
9	List Type	Custom List

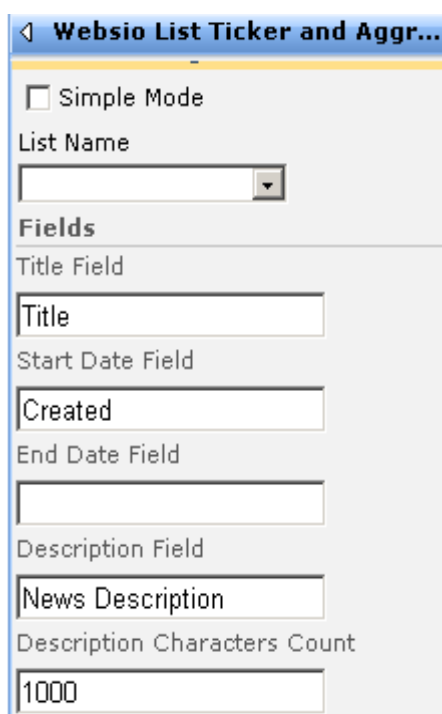
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10	Content Type	Enterprise News
11	Sort By Field	Empty or any existing field name, for example "Created" to show items sorted by creation date
12	Filter By Audience	False (Unchecked)
13	Display Start Field	Empty
14	Display End Field	Expires at
15	Display in the Ticker Field	Show on division site



**Websio List Ticker and Aggr...**

☐ Simple Mode

List Name  
[Dropdown]

**Fields**

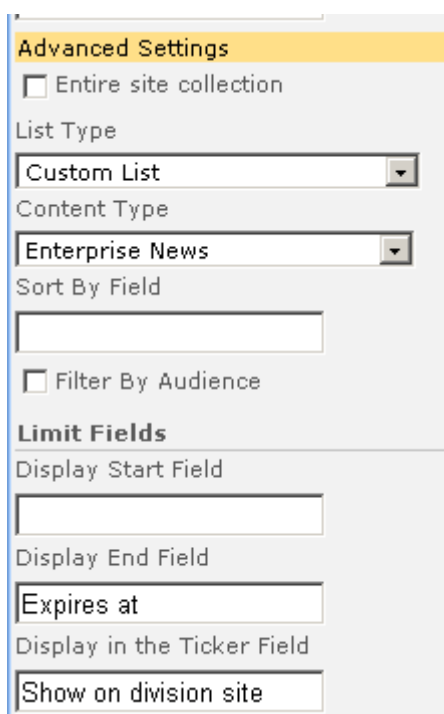
Title Field  
[Title]

Start Date Field  
[Created]

End Date Field  
[ ]

Description Field  
[News Description]

Description Characters Count  
[1000]



**Advanced Settings**

☐ Entire site collection

List Type  
[Custom List]

Content Type  
[Enterprise News]

Sort By Field  
[ ]

☐ Filter By Audience

**Limit Fields**

Display Start Field  
[ ]

Display End Field  
[Expires at]

Display in the Ticker Field  
[Show on division site]

14. Press "OK" and you'll see two items scrolled: "Division-level item" and "Enterprise-level item".
15. Repeat steps 5-14 for site "Division 2".
16. Open main enterprise site "Top Site"
17. Add "Websio List Ticker and Aggregator" Web Part. See section "Installation" for detailed instructions how to install the Web Part.

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18. Open Web Part properties and define them as shown below:

#	Property Name	Value
1	Single Mode	False (unchecked)
2	List Name	Empty
3	Title Field	Title
4	Start Date Field	Created
5	End Date Field	Empty
6	Description Field	News Description
7	Description Characters Count	1000
8	<b>Entire site collection</b>	<b>True (Checked)</b>
9	List Type	Custom List
10	Content Type	Enterprise News
11	Sort By Field	Empty or any existing field name, for example "Created" to show items sorted by creation date
12	Filter By Audience	False (Unchecked)
13	Display Start Field	Empty
14	Display End Field	Expires at
15	<b>Display in the Ticker Field</b>	<b>Show on enterprise site</b>

Webzio List Ticker and Aggr...

Ticker Settings

☐ Simple Mode

List Name

Fields

Title Field

Title

Start Date Field

Created

End Date Field

Description Field

News Description

Description Characters Count

1000

Advanced Settings

☒ Entire site collection

List Type

Custom List

Content Type

Enterprise News

Sort By Field

☐ Filter By Audience

Limit Fields

Display Start Field

Display End Field

Expires at

Display in the Ticker Field

Show on enterprise site

19. Press OK and you'll see only enterprise-level items scrolled.