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SharePoint 2010
Designing Lists for Site Owners

Class Scope and Purpose

- Description
  - This class covers the basics of creating, customizing, and maintaining SharePoint lists.
- Audience
  - Users who have been designated as site owners.
- Prerequisite
  - SharePoint 2010 – Working with Lists for End Users

Class Main Topics

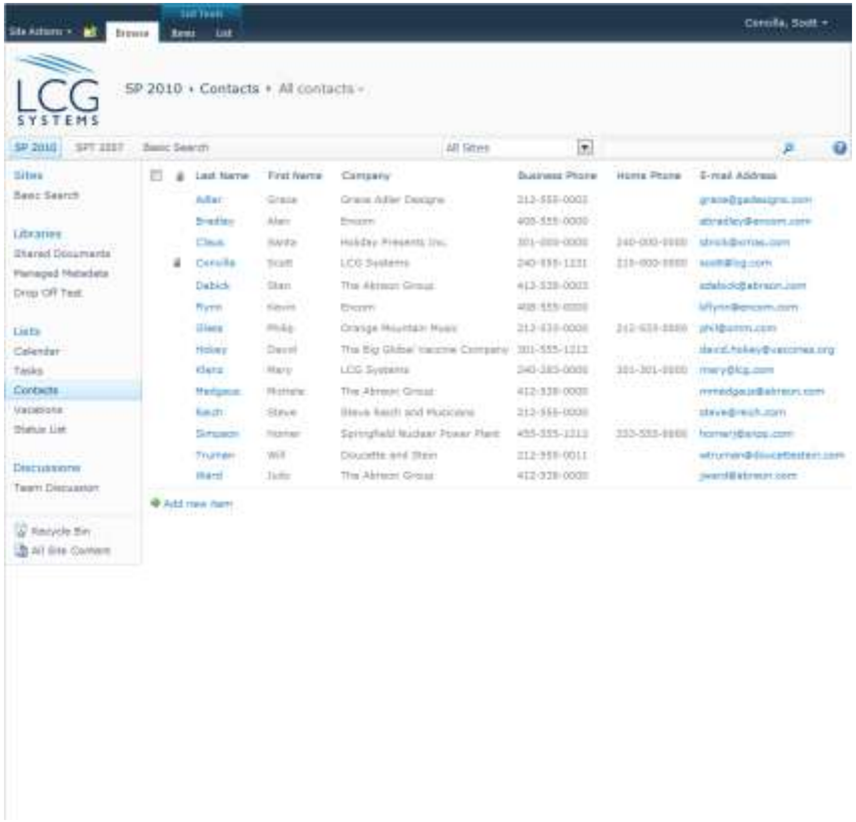
- Reviewing Basic List Concepts
- Creating a List
- Customizing the List Settings
- Working with Columns
- Working with Site Columns
- Validating Data
- Working with Views
- Managing a List

Reviewing Basic List Concepts

- Defining Lists
- Built-in Lists
- Custom Lists
- List Tasks and Permissions

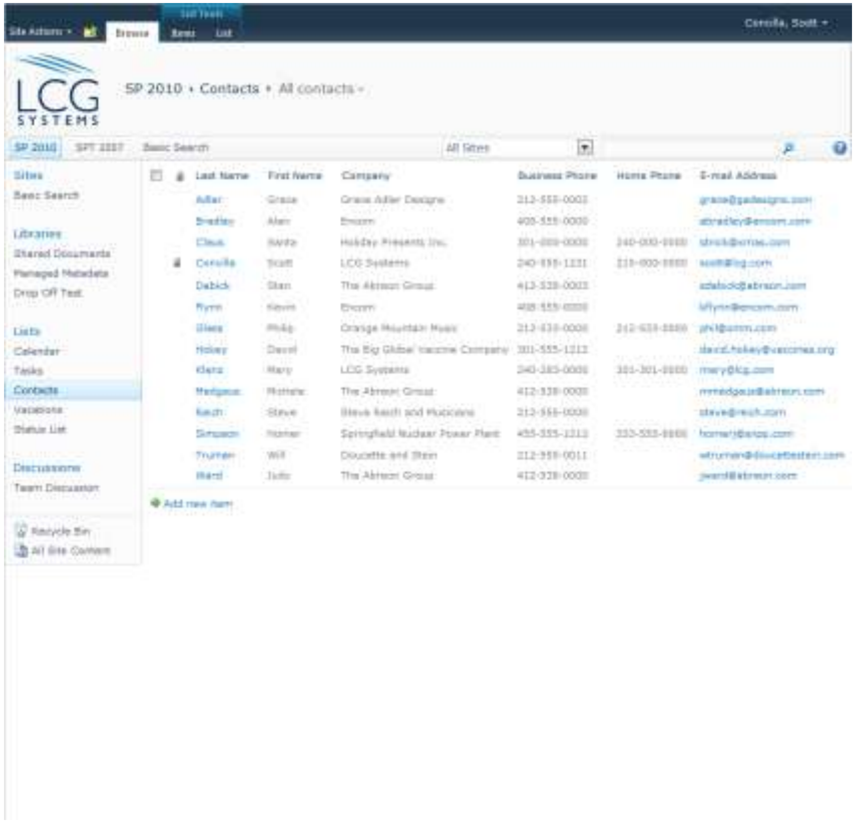
Defining Lists

- A list is a collection of similar items.
  - Contact info
  - Calendar events
  - Inventory items
- Lists group items together for later retrieval or usage.



Defining Lists

- SharePoint lists store data and information, **not files**.
- List data is organized into columns and rows like an Access table or Excel spreadsheet.



Built-in Lists

- SharePoint has many built-in list templates and types.
- The starred types can be connected or linked to Outlook.
- Built-in lists can be customized as needed.

Built-In Lists
Calendars *
Contacts *
Announcements
Tasks *
Links
Discussion Boards *
Issue Tracking
Surveys

Custom Lists

- Custom lists can be created when there isn't a template that meets your needs.
  - Essentially, this is creating a list "from scratch".

Custom Lists
Grant Data
Science Data
Research Data
Web Usage Report
References List
Accomplishments
Registrations

List Tasks and Permissions

TASKS THAT CAN BE DONE BY ANYONE	TASKS THAT MAY REQUIRE EXTRA PERMISSIONS

TASKS THAT CAN BE DONE BY ANYONE

- Viewing item details *
- Sorting list data
- Filtering list data
- Changing the list view

TASKS THAT MAY REQUIRE EXTRA PERMISSIONS

- Viewing item details *
- Adding list items
- Modifying list items
- Deleting list items
- Creating views
- Adding or modifying list columns
- Changing list settings

Creating a List

- When to Create New Lists
- Creating a New List
- Guidelines for Naming a List
- Setting the Initial List Options
- Creating a List Using a Template
- Creating a Custom List
- Creating a List by Importing from Excel

When to Create New Lists

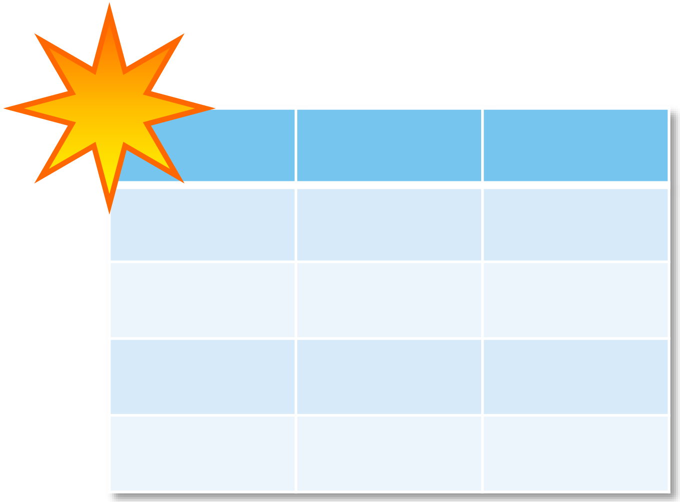
- When deciding whether to create a new list, consider the following:
  - What is the purpose of the list?
  - Who needs access to the list?
  - What features and options do you need in the list?

When to Create New Lists

- Some possible reasons for a new list:
  - File metadata that you need or want is different.
  - Access permissions need to be different.
  - Using workflows that are specific to documents in the library.
  - Documents need version control and approvals.

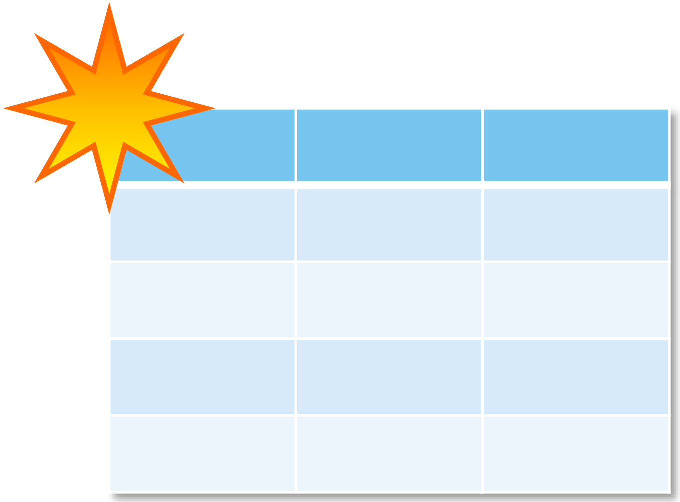
Creating a New List

- There are four primary methods for creating a new list:
  - Use a built-in template
  - Create a list from scratch (custom list)
  - Import a spreadsheet from Excel
  - Use a previously created list as a template



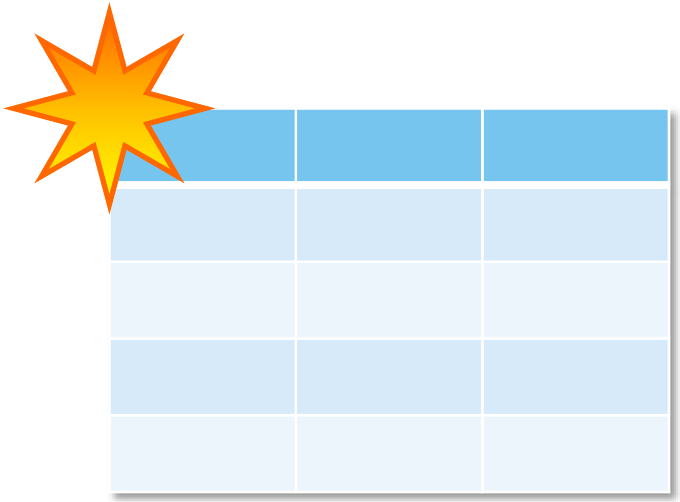
Creating a New List

- In this section, we will look at the first three methods.
- The last method (using an existing list as a template) will be addressed in a later section.



Creating a New List

- Before we look at any of the methods for creating a new list, we need to go over some guidelines and options that apply to all methods.



Guidelines for Naming a List

- Due to technical limitations, SharePoint URLs cannot be longer than 255 characters.

  URL = server + site + list name + folder name + file name

- The following is a typical URL for a file:

  http://www.contoso.com/sites/marketing/Shared%20Documents/Promotional%20Brochures/Some%20File.xlsx

  Notice how spaces translate into three characters (%20)!

Guidelines for Naming a List

- When **initially** creating and naming a list:
  - Use a short name
  - Do not use spaces
  - Do not use special characters
- After the list has gone through the initial creation and naming process, go back to the **List Settings** and change the Title/Name of the list.

Guidelines for Naming a List

For example, instead of naming a list:

Department Contacts

Give it a short name when creating the list:

deptcont

Then return to the **List Settings** and alter the **Name** to your original, “more user friendly” choice.

Setting the Initial List Options

- For almost all list types, the first option is to just **Name** the list.
- These two list types do not give you any options at the start:
  - External List
  - Import Spreadsheet

Setting the Initial List Options

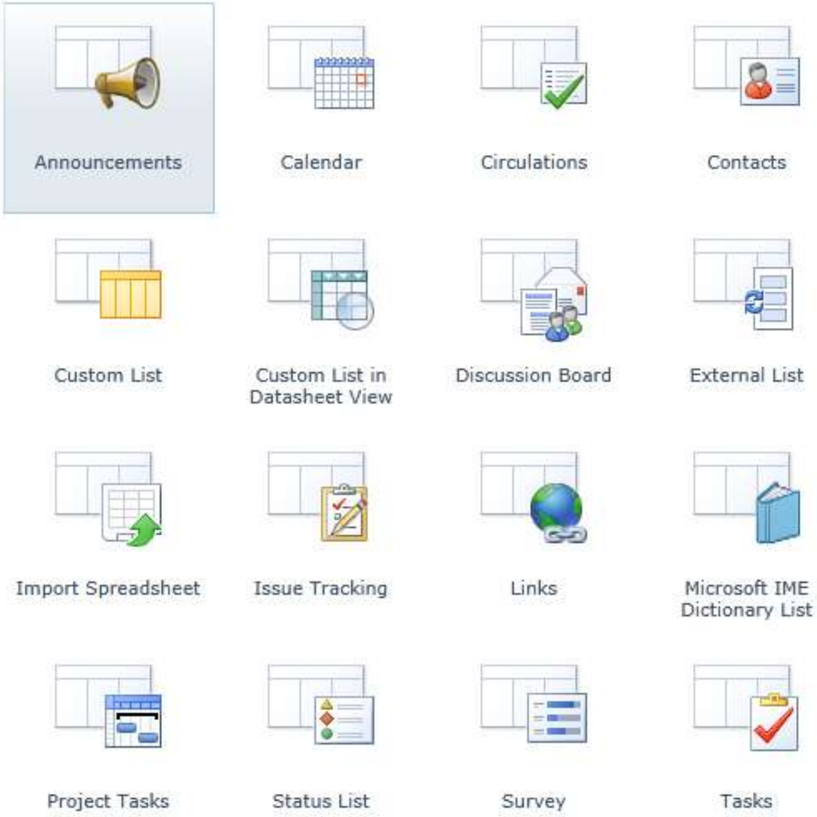
- The **More Options** button provides access to additional settings.
  - All list types add **Navigation**
  - Calendar adds **Group Calendar Options**
  - Survey adds **Survey Options**

Setting the Initial List Options

- All settings of all list types can be changed later on the **List Settings** page.

Creating a List – By Template

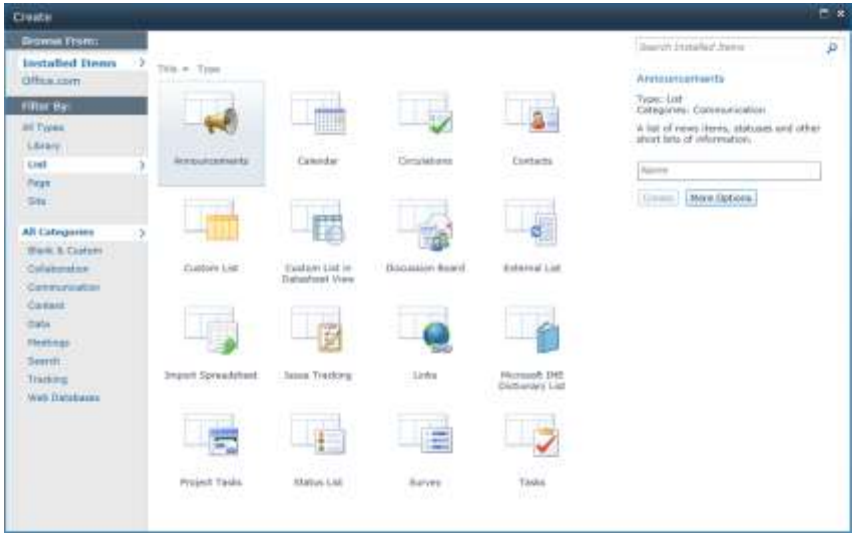
- SharePoint includes over a dozen built-in templates for creating a list.
- Templates can be used as-is, or they can be customized as needed later.



Creating a List – By Template

Procedure

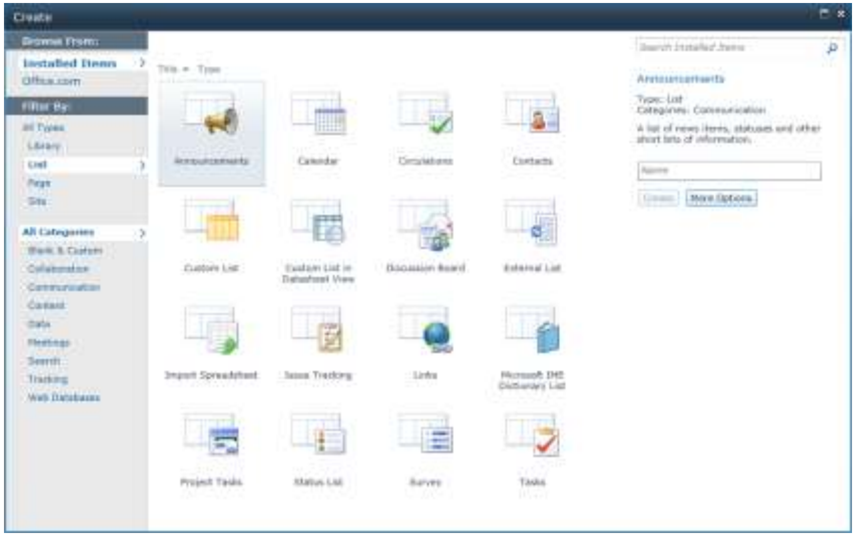
1. Select the **Site Actions** menu and choose **More Options**.
2. In the **Filter By** section, select **List**.
3. In the middle pane, select the desired list type.



Creating a List – By Template

Procedure (continued)

4. Give the list a **Name**.
   - Remember the guidelines discussed earlier for list names.
5. Select **More Options** if desired or needed.
6. Click **Create** when finished.



Creating a List – Custom

- If none of the built-in list templates meet your needs, you can create a custom list.
- This is essentially "creating a list from scratch".

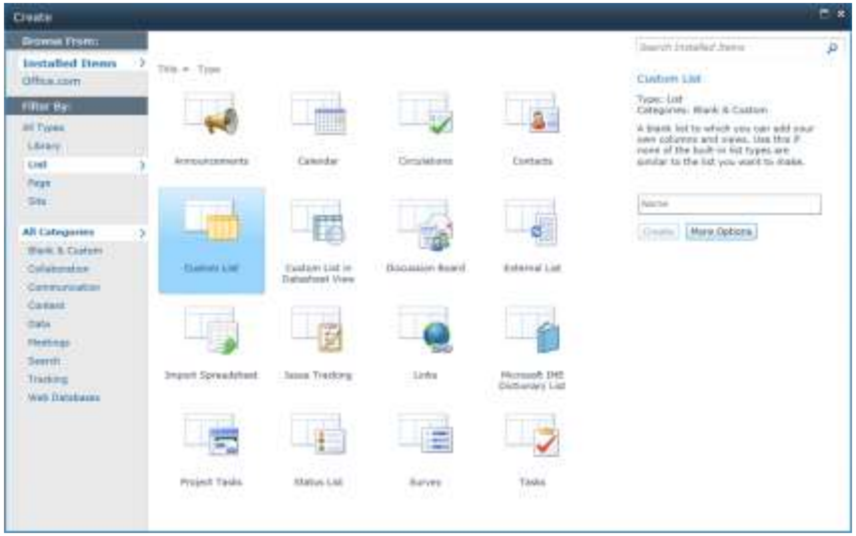
Creating a List – Custom

- Once the basic list is created, you will need to create everything including:
  - Column names
  - Column types
  - List settings
  - List views

Creating a List – Custom

Procedure

1. Select the **Site Actions** menu and choose **More Options**.
2. In the **Filter By** section, select **List**.
3. In the middle pane, select **Custom List**.
4. Give the list a **Name** and **Create** it.



Creating a List – By Importing

- SharePoint has the ability to create a new list by importing an existing spreadsheet.

Creating a List – By Importing

- SharePoint can import any of the following from a spreadsheet
  - An existing data table (Table Range)
  - A range of named cells (Range Name)
  - Any block of cells with defined column headers and data (Range of Cells)

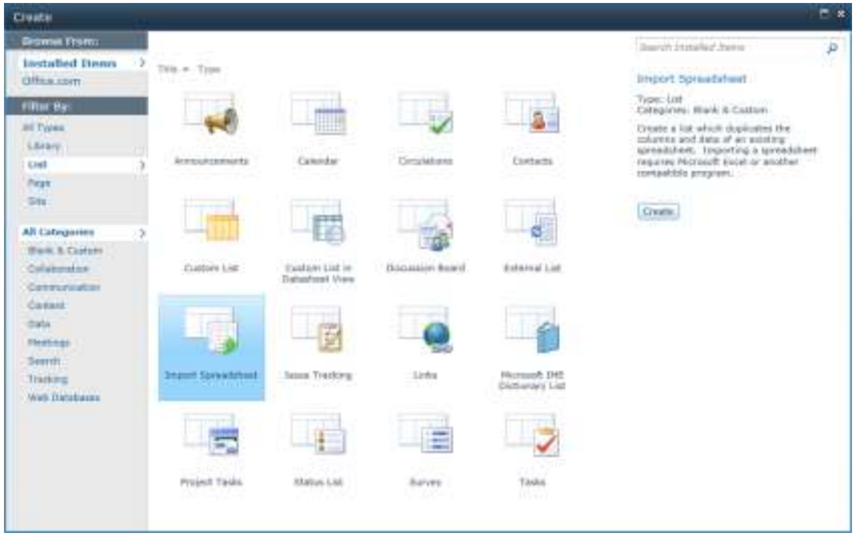
Creating a List – By Importing

- Importing can ***only*** be done in the creation of a ***new*** list.
- You ***cannot*** import data into an existing SharePoint list.

Creating a List – By Importing

Procedure

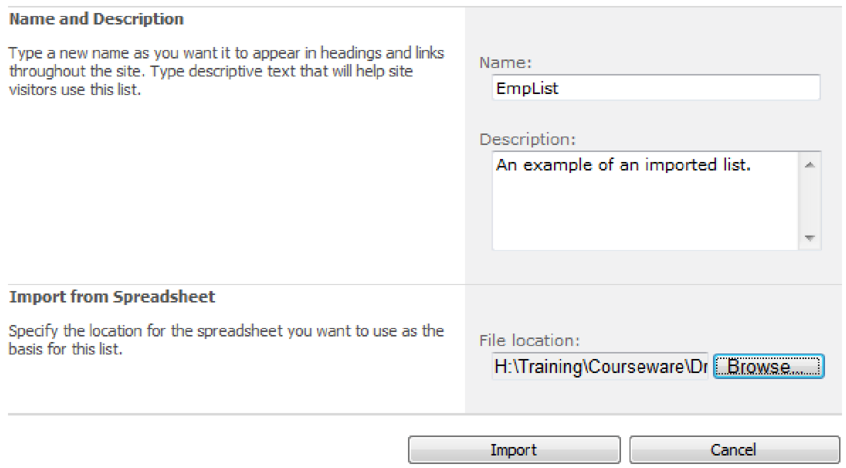
1. Select the **Site Actions** menu and choose **More Options**.
2. In the **Filter By** section, select **List**.
3. In the middle pane, select **Import Spreadsheet**.
4. Click **Create**.



Creating a List – By Importing

Procedure (continued)

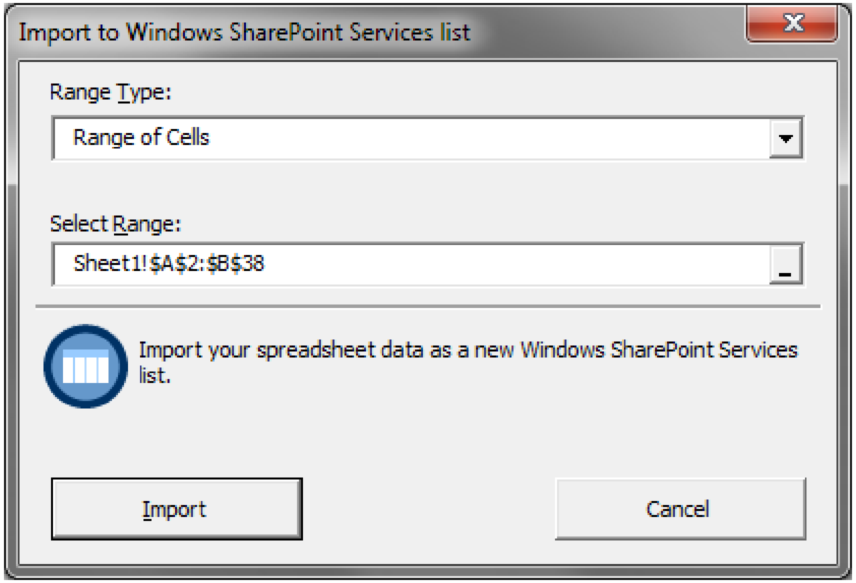
5. Enter a **Name** and **Description** of the list.
6. Click **Browse** and select a file.
7. Click **Import**.



Creating a List – By Importing

Procedure (continued)

8. Excel will open with the spreadsheet displayed.
9. In the dialog box, select the **Range Type** you are importing and then **Select Range**.
10. Click **Import**.



Customizing the List Settings

- About List Settings
- Accessing the List Settings
- Title, Description, and Navigation Settings
- Versioning Settings
- Advanced Settings

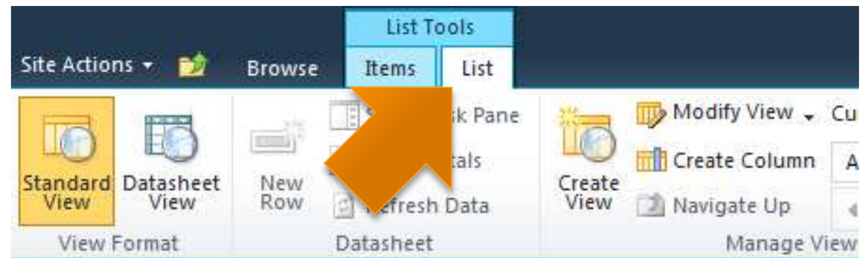
About List Settings

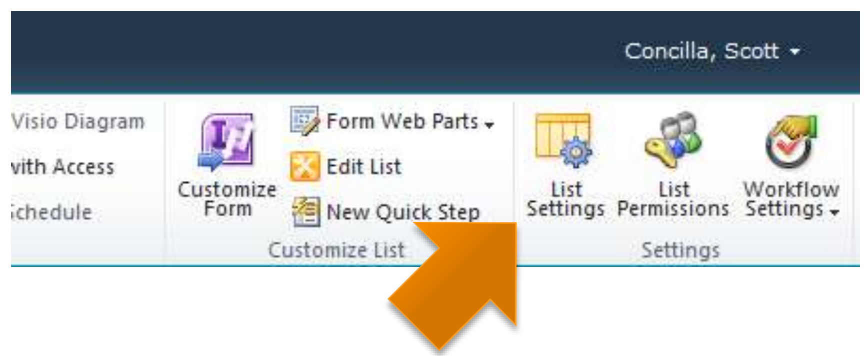
- Once a list has been created, there are many settings and options that can be customized for the specific needs and uses of the list.

Accessing the List Settings

Procedure

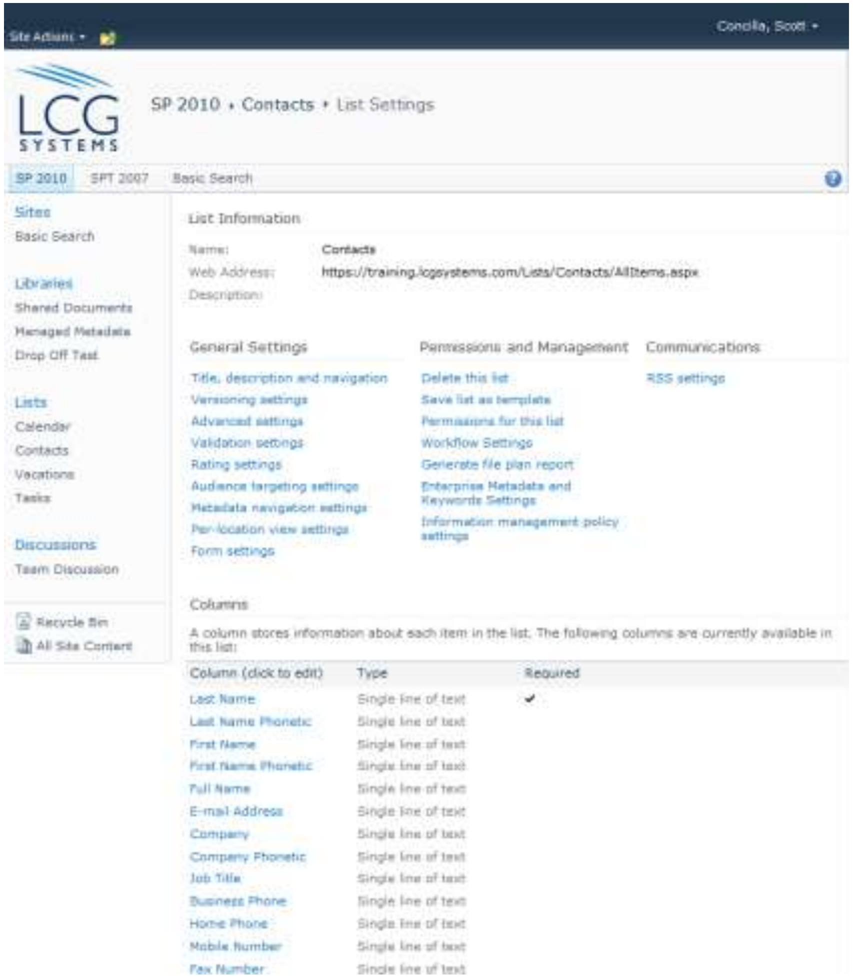
1. On the **List** tab, in the **Settings** group, click the **List Settings** button.
2. The **List Settings** page displays.





About List Settings

- The **List Settings** page is divided into sections.
  - List Information
  - General Settings
  - Permissions and Management
  - Communications
  - Content Types
  - Columns
  - Views



About List Settings

- Throughout today's class, we will be working with many (but not all) of the settings and options found on the **List Settings** page.

About List Settings

- For now, let's take a look at some of the options available within the **General Settings** section.
  - Title, Description, and Navigation
  - Versioning settings
  - Advanced settings

Title, Description, and Navigation

- The **Title, Description, and Navigation** page contains two basic sections.
  - Name and Description
  - Navigation

Title, Description, and Navigation

Name

- The **Name** is used on the Quick Launch Menu and the Top Link bar.

Description

- The **Description** is displayed underneath the bread crumb trail for the list, and is also displayed when viewing the All Site Content page.

Navigation

- This option determines whether the library will appear on the Quick Launch menu (on the left).

Versioning Settings

- The **Versioning Settings** page has three sections.
  - Content Approval
  - Item Version History
  - Draft Item Security

Versioning Settings

Content Approval	• Specifies whether new or changed items should remain in a draft state until they have been approved.
Item Version History	• Specifies if previous versions of an item are kept, and how many versions to keep.
Draft Item Security	• Specifies which users should be able to view draft items.

Advanced Settings

- The **Advanced Settings** page contains a variety of unrelated but more technical settings for a list.

Advanced Settings

- Each section on this page has a description of what the option controls or will change.
- Most options are "yes" or "no" choices.

- **Research and/or test an option before deploying it to users!**

Working with Columns

- About Columns
- Understanding Column Types
- Basic Column Types
- Creating a New Column
- Modifying an Existing Column
- Deleting a Column
- Changing the Field Order

About Columns

- Columns store information that is used for many purposes in SharePoint.
  - Sorting
  - Filtering
  - Grouping
  - Views
  - Calculations
  - Metadata storage

About Columns

- Column actions
  - New columns can be created.
  - The properties of existing columns can be modified.
  - Columns that aren’t needed can be deleted.

Understanding Column Types

- The **column type** determines how and what kind of data can be stored in the column.
- SharePoint supports 17 different column types.
  - Not all types are available in all lists.

Basic Column Types

Single line of text	• Displays small amounts of unformatted text on a single line.
Multiple lines of text	• Displays formatted or large amounts of text on multiple lines.
Choice	• Allows choices from a list of options – uses checkboxes, radio buttons, or drop-down menus.
Number	• Used for storing numerical values used that could be used in calculations.
Date and time	• Used for storing calendar dates, or for both a date and a time.

Additional Column Type Info

- For additional information on basic column types, as well as column types not discussed here:
  - Use the instructions at the end of this presentation to access **Microsoft Office Online**.
  - Search for **Site column types and options**.

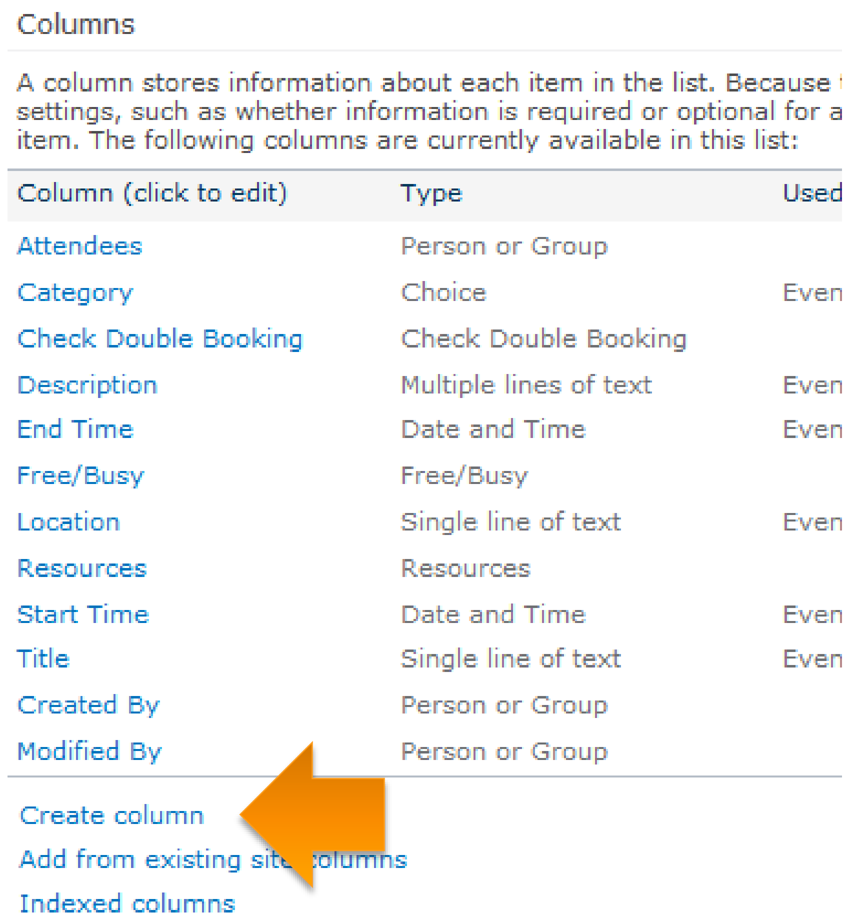
Creating a New Column

- When new information or metadata is needed in a list, a new column can be created and added to collect the information.

Creating a New Column

Procedure

1. On the **List** tab, in the **Settings** group, click the **List Settings** button.
2. On the **List Settings** page, in the **Columns** section, click **Create Column**.



Creating a New Column

Procedure (continued)

3. Give the column a **Name** and select a **Type**.
4. The **Type** will determine the options and settings available in the **Additional Column Settings**.
5. Click **OK** when finished.

Modifying a Column

- The properties of existing columns can be changed as needed.
- Depending on the data type, some column properties cannot be changed once a column has been created or has data.

Modifying a Column

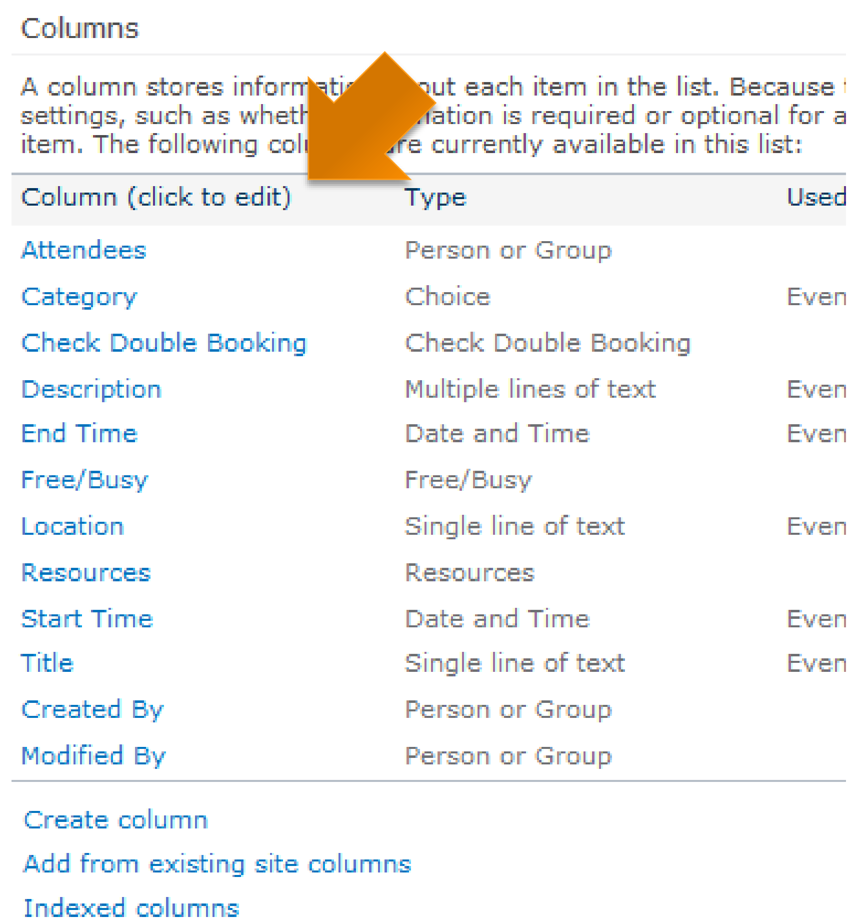
CAUTION!!

- Use caution when making changes to columns with existing data – the changes may cause data to be lost or permanently changed.

Modifying a Column

Procedure

1. Display the **List Settings**.
2. In the **Columns** section, click the name of the column to edit.
3. Make changes as desired.
4. Click **OK** when finished.



Deleting a Column

- If a column and its data are no longer needed or wanted, the column can be deleted.

Deleting a Column

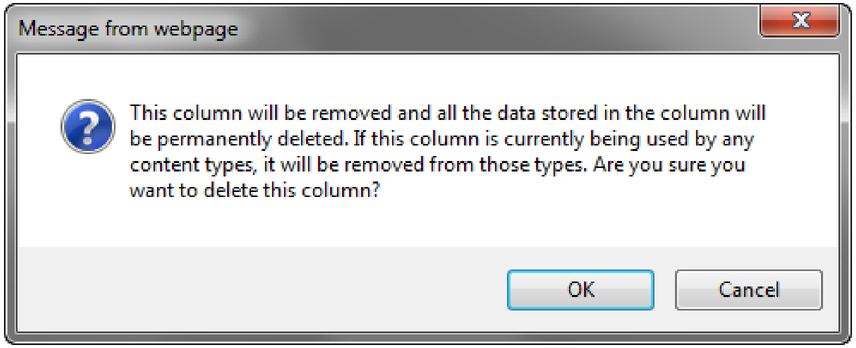
CAUTION!!

- Once a column has been deleted, the column (and any data it may have contained) is NOT recycled and it CANNOT be restored.

Deleting a Column

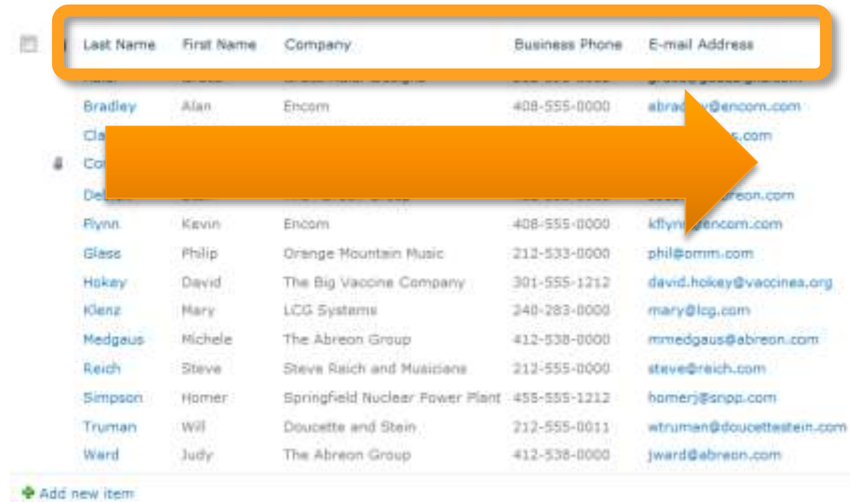
Procedure

1. Display the **List Settings**.
2. In the **Columns** section, click the name of the column to delete.
3. Scroll down and click the **Delete** button.
4. Click **OK** to acknowledge the warning and continue.



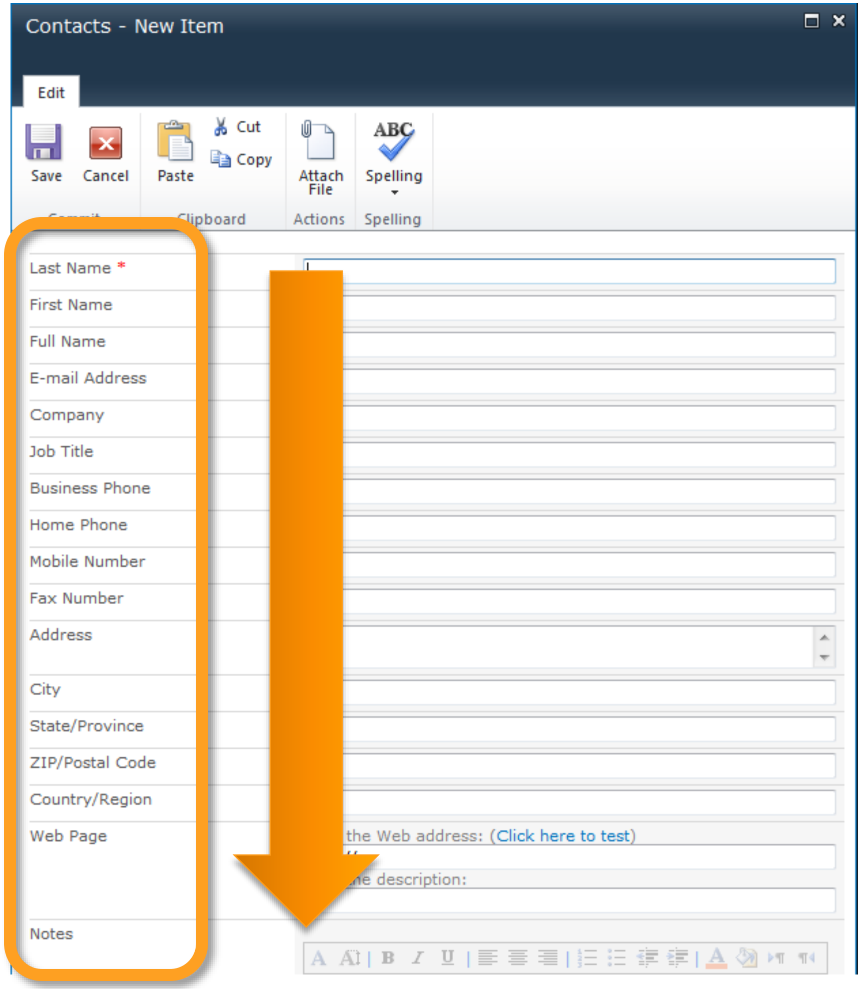
Column Order vs. Field Order

- **Column Order** is the left-to-right order of the columns when viewing a list.
- **Column Order** is determined by the settings of the current **View**.



Column Order vs. Field Order

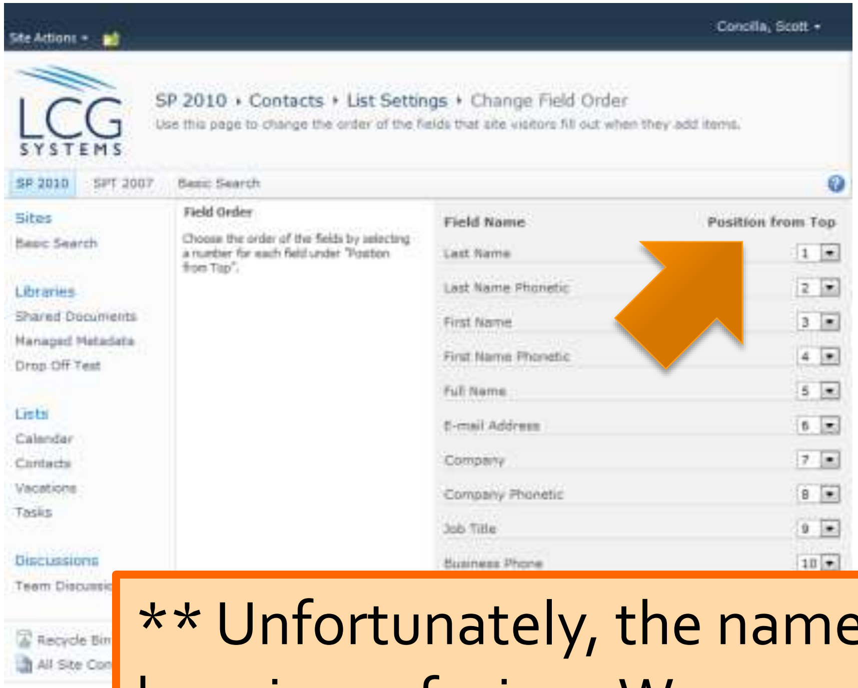
- **Field Order** is the top-to-bottom order of the fields when viewing or editing the properties.
- **Field Order** is determined by the **List Settings**.



Changing the Field Order

Procedure

1. Display the **List Settings**.
2. In the **Columns** section, click **Column Ordering****.
3. Use the **Position from Top** drop-down menus to change the order.
4. Click **OK** when finished.



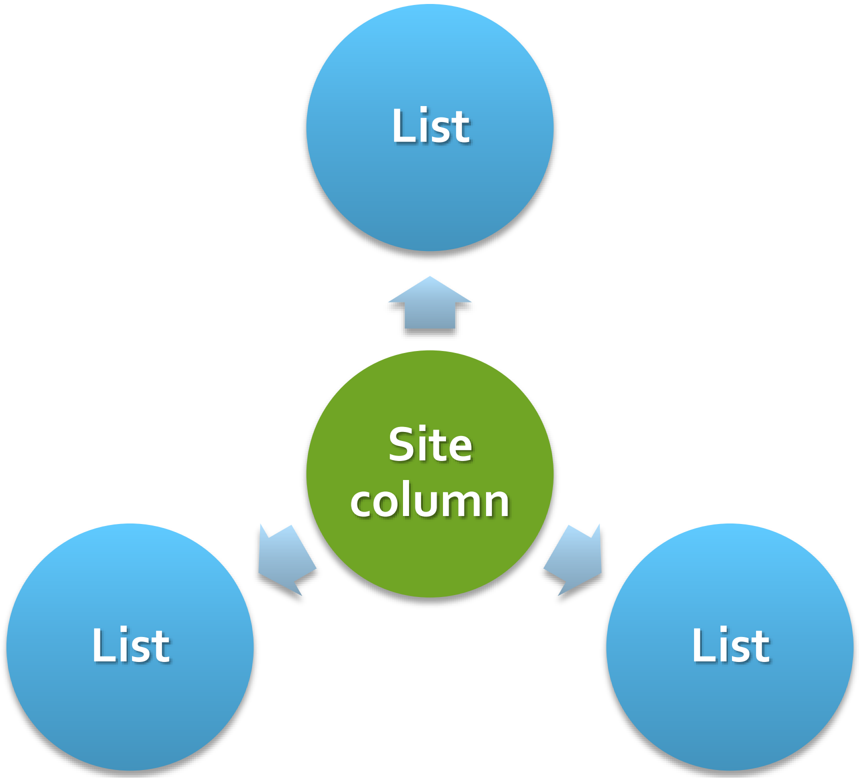
** Unfortunately, the name here is confusing. We are trying to change the **FIELD order**, but the option is called **Column Ordering**.

Working with Site Columns

- Understanding Site Columns
- Benefits of Site Columns
- Creating a Site Column
- Adding a Site Column to a List

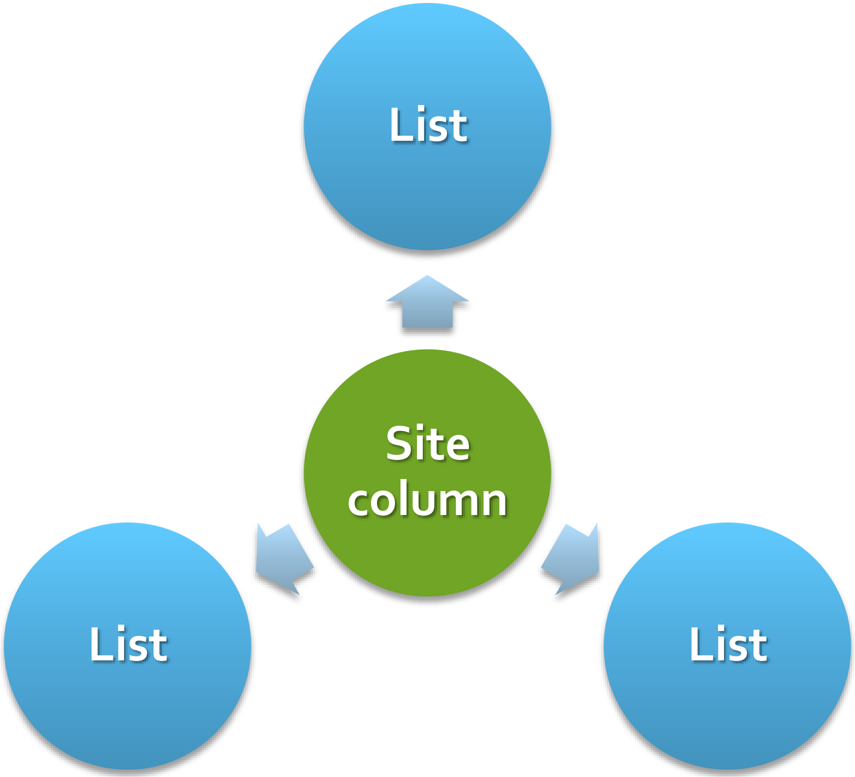
Understanding Site Columns

- **Site columns** are special columns stored at the site level instead of in a single list.
- Can be re-used throughout a site.



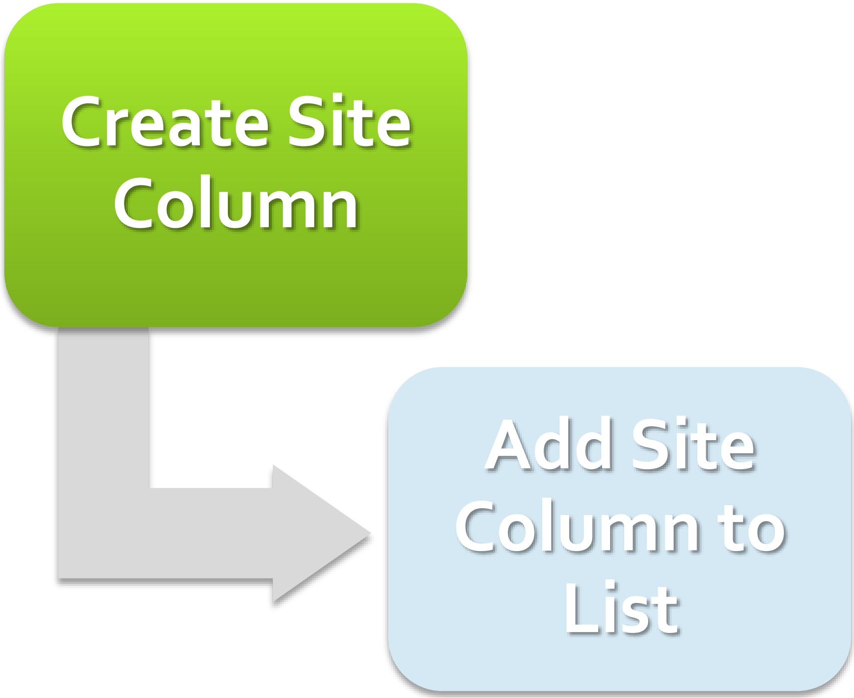
Benefits of Site Columns

- Create once, use multiple times.
- Consistent options or choices across sites, lists, and libraries.
- Changes made to a site column are pushed down to any place where the column is present.



Creating a Site Column

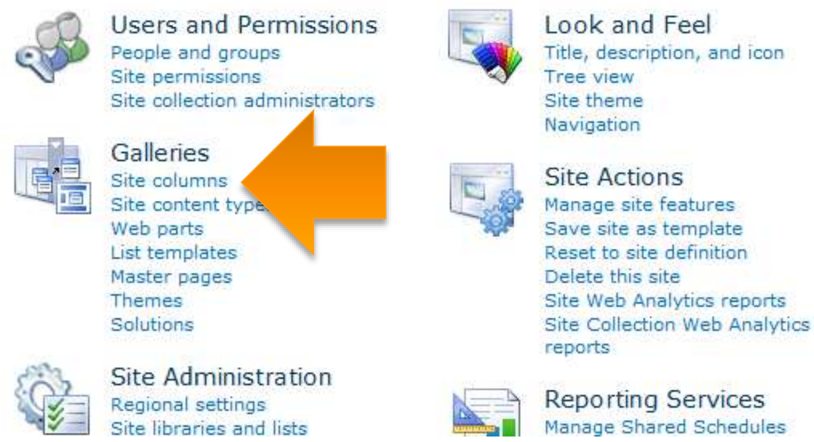
- In order to add a site column to a list, it must first be created and stored in the **Site Column Gallery**.

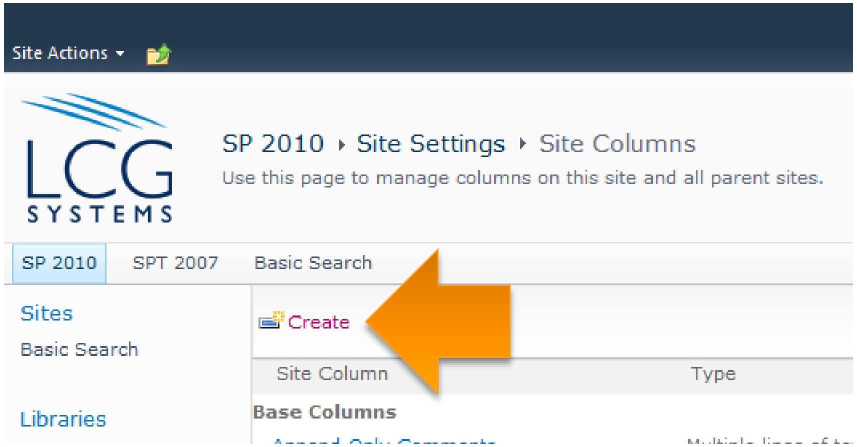


Creating a Site Column

Procedure

1. Select the **Site Actions** menu and choose **Site Settings**.
2. In the **Galleries** section, click **Site Columns**.
3. On the **Site Columns** page, click **Create**.

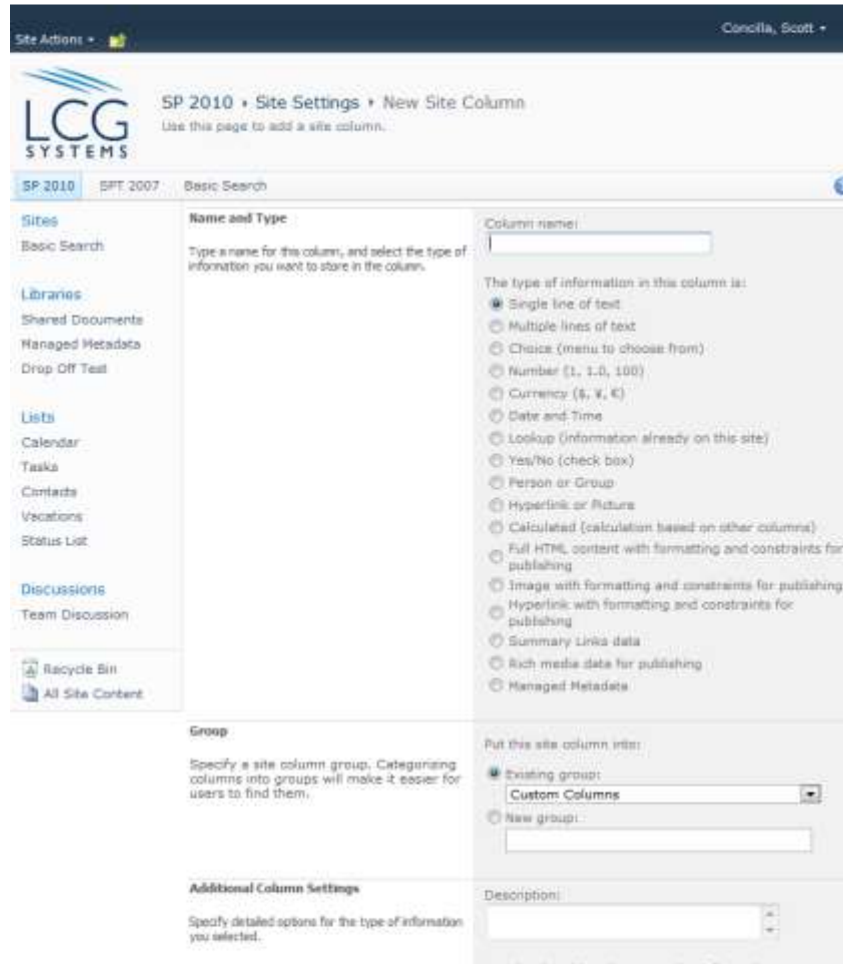




Creating a Site Column

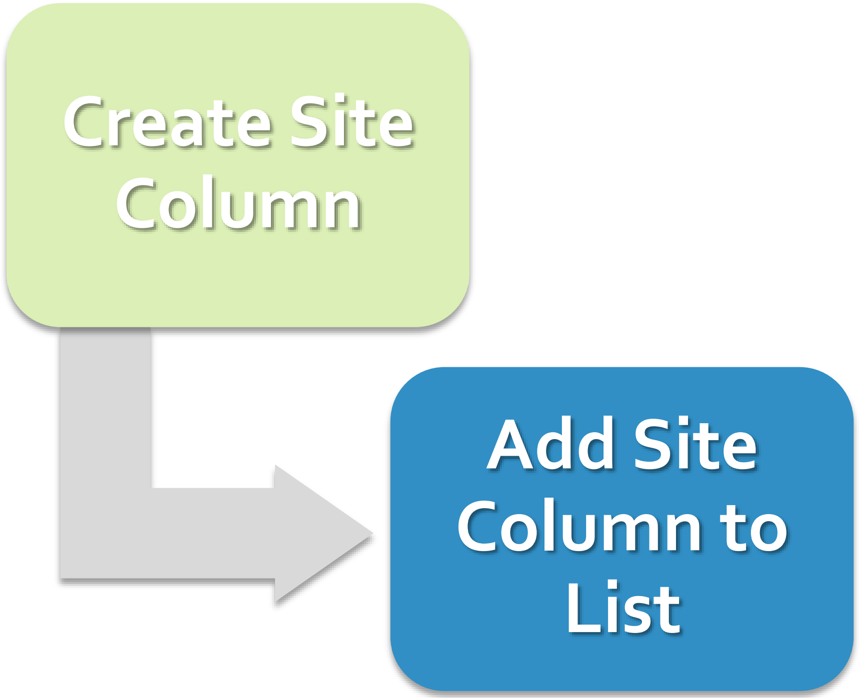
Procedure (continued)

4. Name the site column and select a type.
5. Put the site column into a **Group**.
    - This is for organizational purposes of the gallery.
6. Complete any **Additional Column Settings**.
7. Click **OK** when finished.



Adding a Site Column to a List

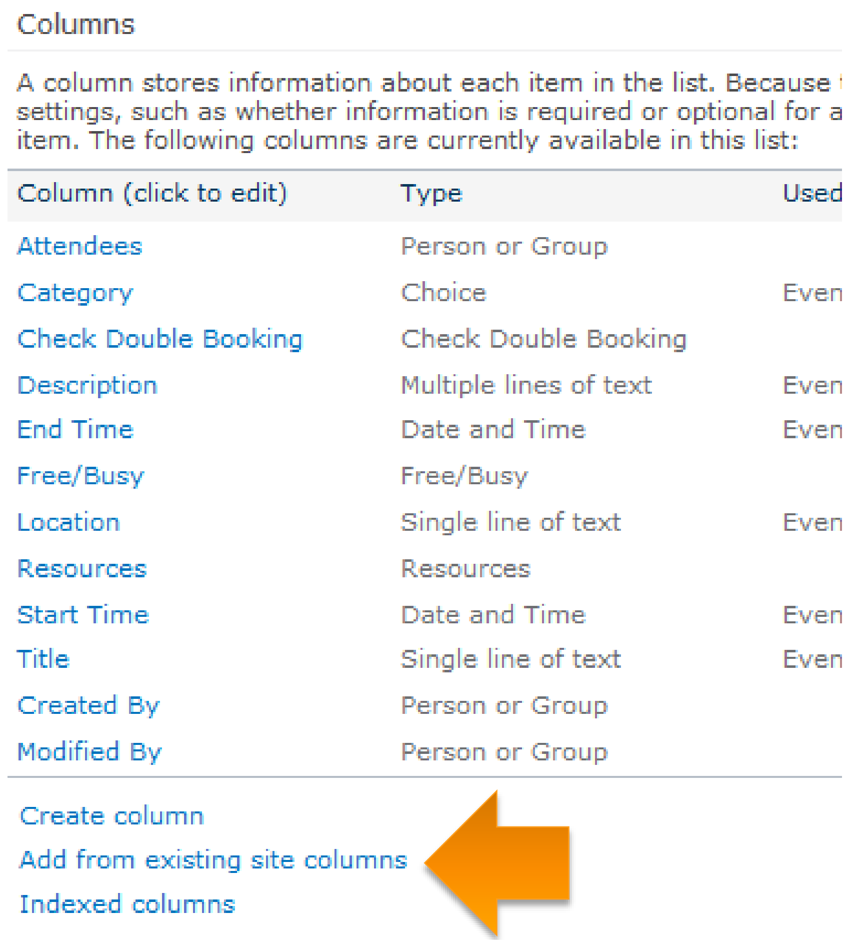
- Once a site column has been created and stored in the **Site Column Gallery**, it can be added to an existing list.



Adding a Site Column to a List

Procedure

1. Navigate to the list and access the **List Settings** page.
2. In the **Columns** section, click **Add from existing site columns**.


Columns

A column stores information about each item in the list. Because settings, such as whether information is required or optional for a item. The following columns are currently available in this list:

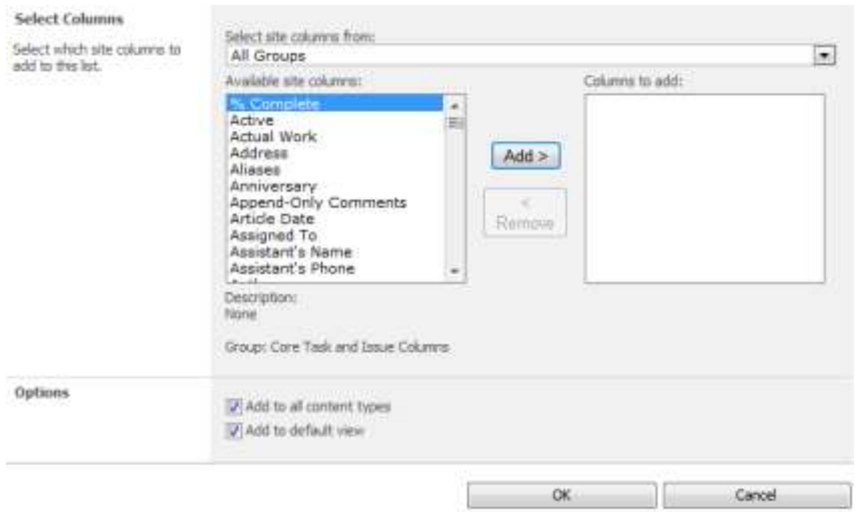
Column (click to edit)	Type	Used
Attendees	Person or Group	
Category	Choice	Even
Check Double Booking	Check Double Booking	
Description	Multiple lines of text	Even
End Time	Date and Time	Even
Free/Busy	Free/Busy	
Location	Single line of text	Even
Resources	Resources	
Start Time	Date and Time	Even
Title	Single line of text	Even
Created By	Person or Group	
Modified By	Person or Group	

Create column
Add from existing site columns
Indexed columns

Adding a Site Column to a List

Procedure (continued)

3. In the **Select Columns** section, select a group from the drop-down, locate the column name on the left, and use the **Add** button.
4. Select or unselect **Options**.
5. Click **OK** when finished.



Validating Data

- About Validating Data
- Getting Additional Formula Help Online
- Validating Data at the List Level
- Validating Data at the Column Level

About Validating Data

- SharePoint has the ability to “validate” or “verify” data that is entered into a column or field.
- There are two types of data validation:
  - List level validation
  - Column level validation

About Validating Data

- Validation formulas must evaluate to TRUE for the validation to pass.
  - Conditional formulas
  - Logical formulas

Getting Additional Help Online

- For additional information on the proper syntax for validation formulas:
  - Use the instructions at the end of this presentation to access **Microsoft Office Online**.
  - Search for **Examples of Common Formulas** and pay particular attention to the section on **Conditional formulas**.

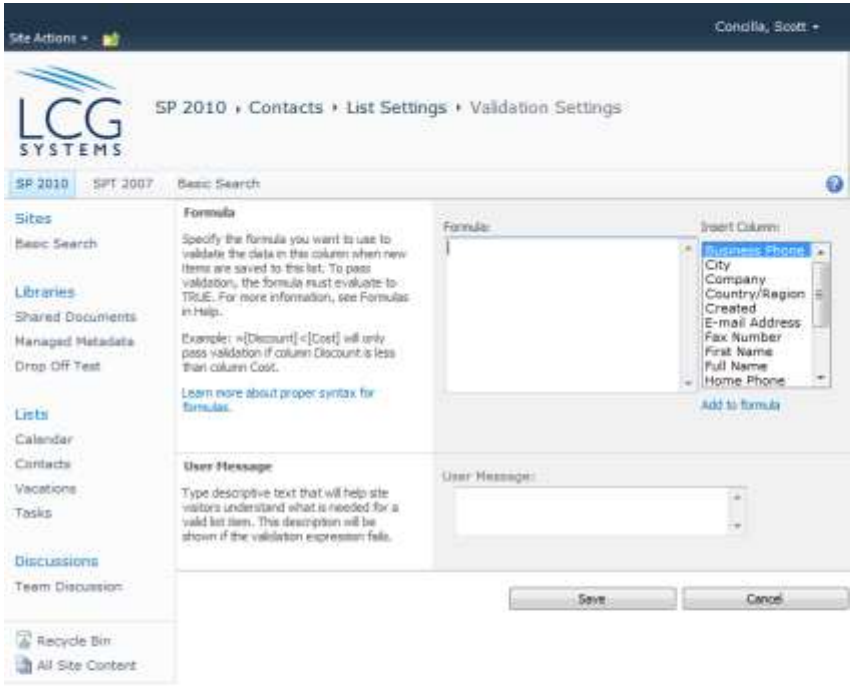
Validating Data – List Level

- Data validation at the **list level** allows you to check one column against another.
  - [ColumnA]>[ColumnB]
- There can only be one validation rule at the list level.

Validating Data – List Level

Procedure

1. Display the **List Settings**.
2. In the **General Settings** section, click **Validation settings**.
3. Build a **Formula**.
4. Enter a **User Message**.
5. Click **Save** when finished.



Validating Data – Column Level

- Data validation at the **column level** allows you to check ONLY the current column.
- Every column in a list can have one validation rule.

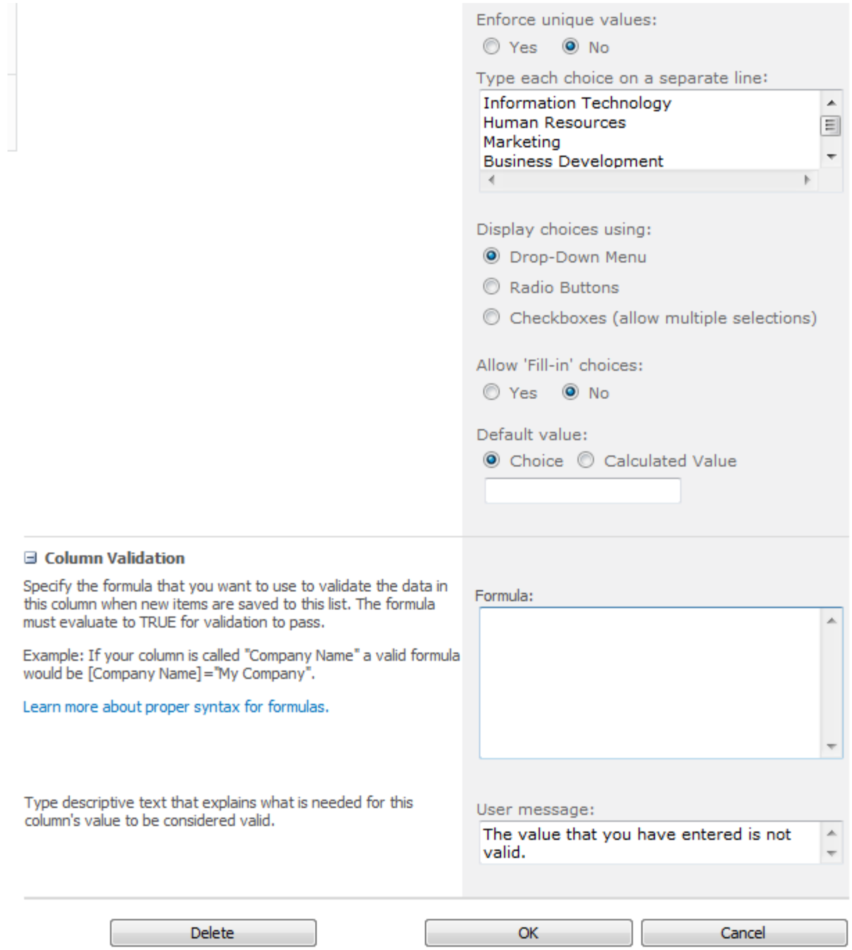
Validating Data – Column Level

- Column validation can only be used on the following column types:
  - Single line of text
  - Choice (single only)
  - Number
  - Currency
  - Date & Time

Validating Data – Column Level

Procedure

1. Display the **List Settings**.
2. Select a column name to edit.
3. Expand the **Column Validation** section.
4. Build a **Formula**.
5. Enter a **User Message**.
6. Click **OK** when finished.

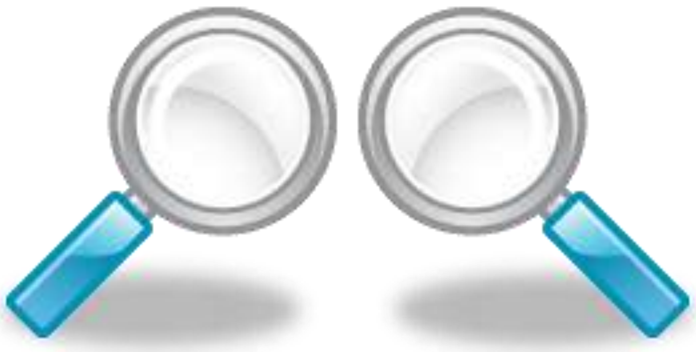


Working with Views

- About Views
- Types of Views
- Views and Permissions
- Creating a New View
- Setting View Options
- Modifying a Current View
- Setting a Default View
- Customizing Available Views

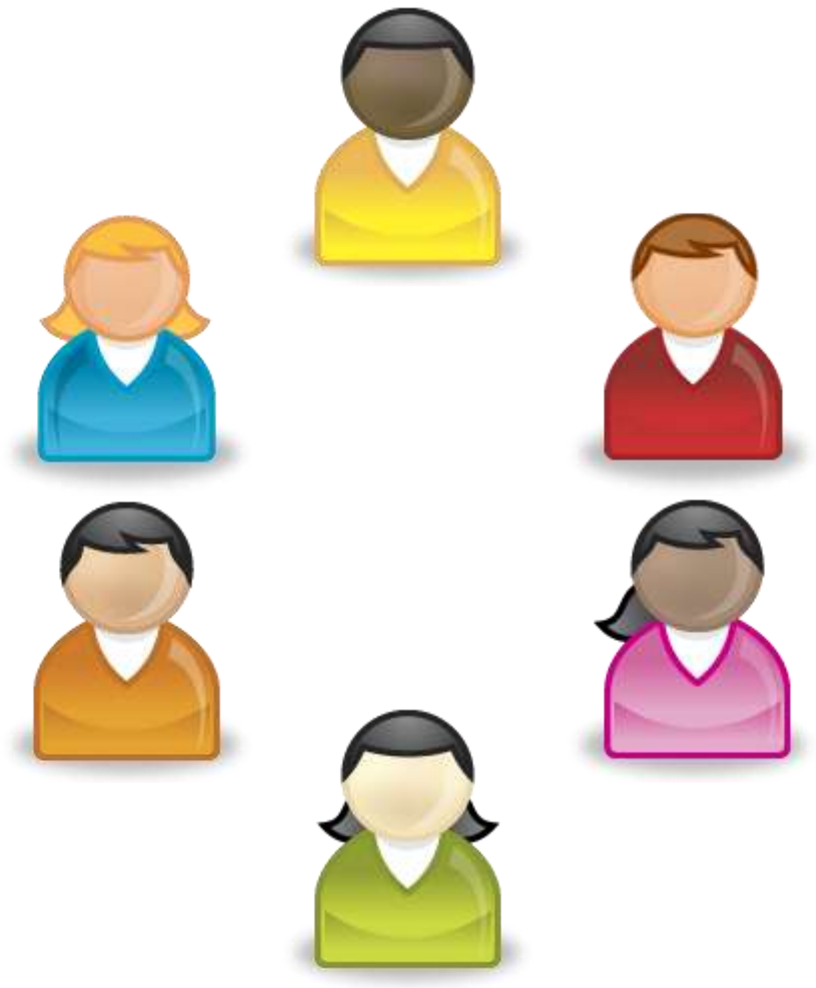
About Views

- A **View** is a collection of settings that determines how the items in a list will be displayed.
- Views are found at the end of the breadcrumb trail and in the **Manage Views** group.



Types of Views

- Public View
  - Can be created by anyone with sufficient rights to create views.
    - Usually a list owner and/or a site owner.
  - A public view is available to all users of the list.



Types of Views

- Personal View
  - Anyone can create a personal view.
  - A personal view is only available to the person who created the view.

Views and Permissions

- The ability to create and modify views is a permission that can be granted to users.
  - The individual permission is called **Manage Lists**.
  - The **Design** and **Full Control** permission levels include this permission.

Views and Permissions

- Views cannot be permission-based.
  - A view is either **Public** (for everyone) or **Personal** (for the user that created it).
  - Cannot have a view that only “certain people or groups” can use.

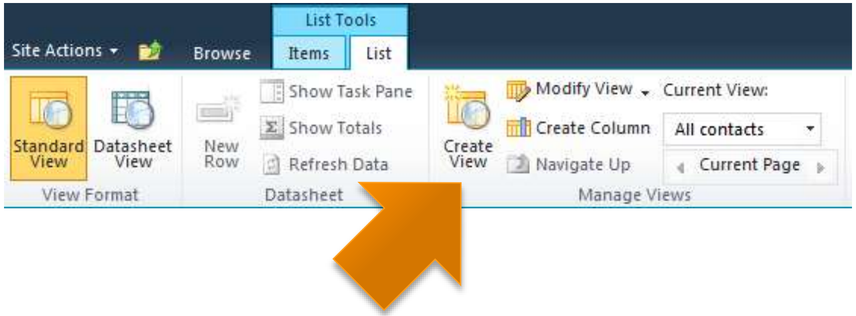
Creating a New View

Procedure

1. On the **List** tab, in the **Manage Views** group, click the **Create View** button.

   OR

   Click the view link at the end of the breadcrumb trail and select **Create View**.



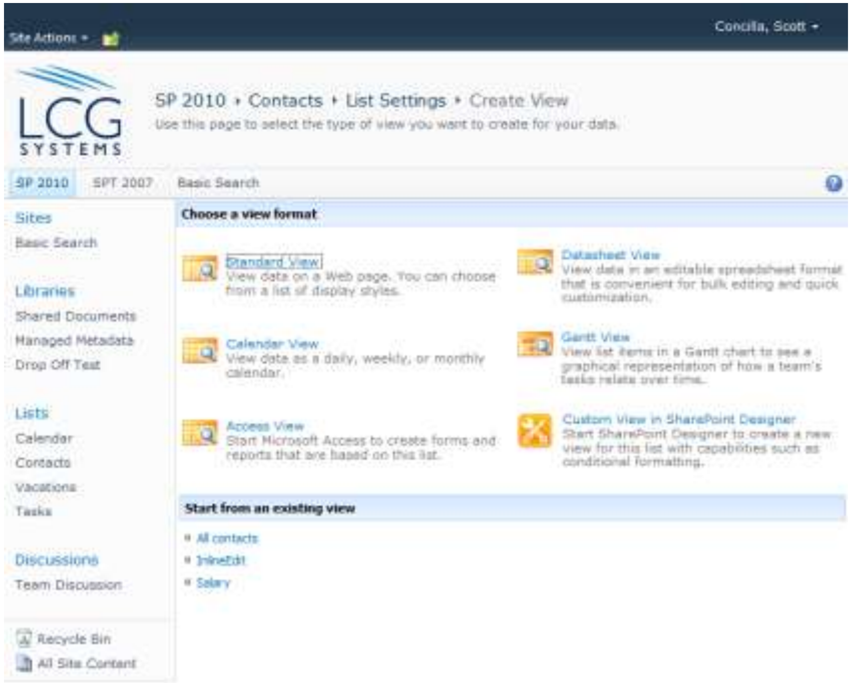
Creating a New View

Procedure (continued)

2. To create a view "from scratch", select an option in the **Choose a view format** section.

   OR

   To base a new view off of a current view, select a view in the **Start from an existing view** section.



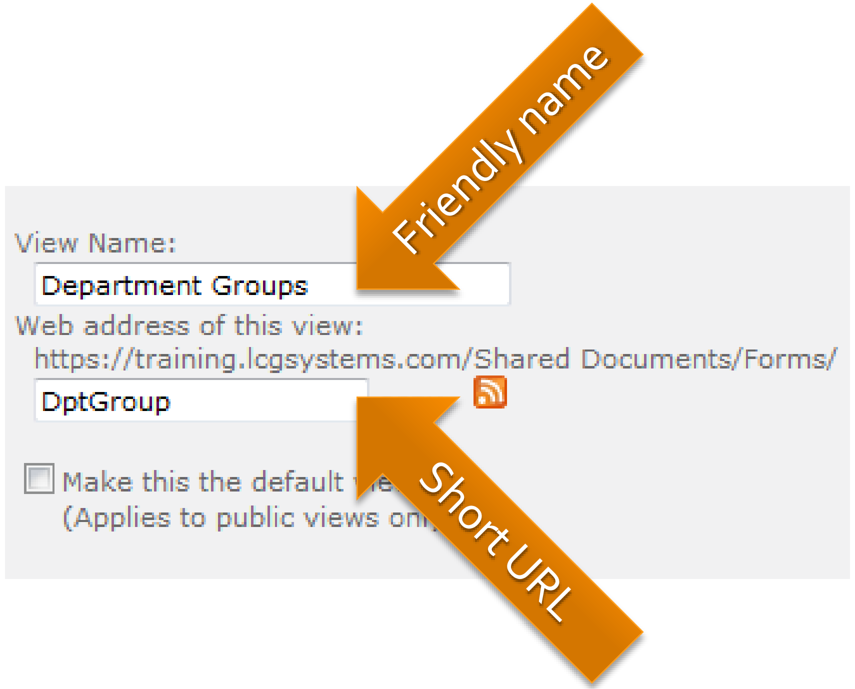
Creating a New View

Procedure (continued)

3. Give the view a **Name**.
4. Select an **Audience** for the view.
5. Select the desired options for the view. (See the following slides for more information.)
6. Click **OK** when finished.

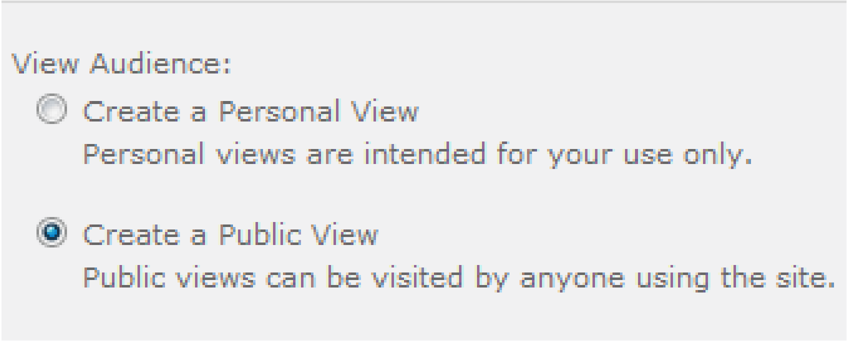
View Options – Name

- When giving a view a **Name**, give it a short-yet-friendly name first.
- After creating and saving the view, go back and change the URL to be shorter.
- A short view name helps with the 255-character URL limit.



View Options – Audience

- The **Audience** section determines whether the view is a Public view or Personal view.
- This option **CANNOT** be changed or switched after the view has been saved.



View Options – Other

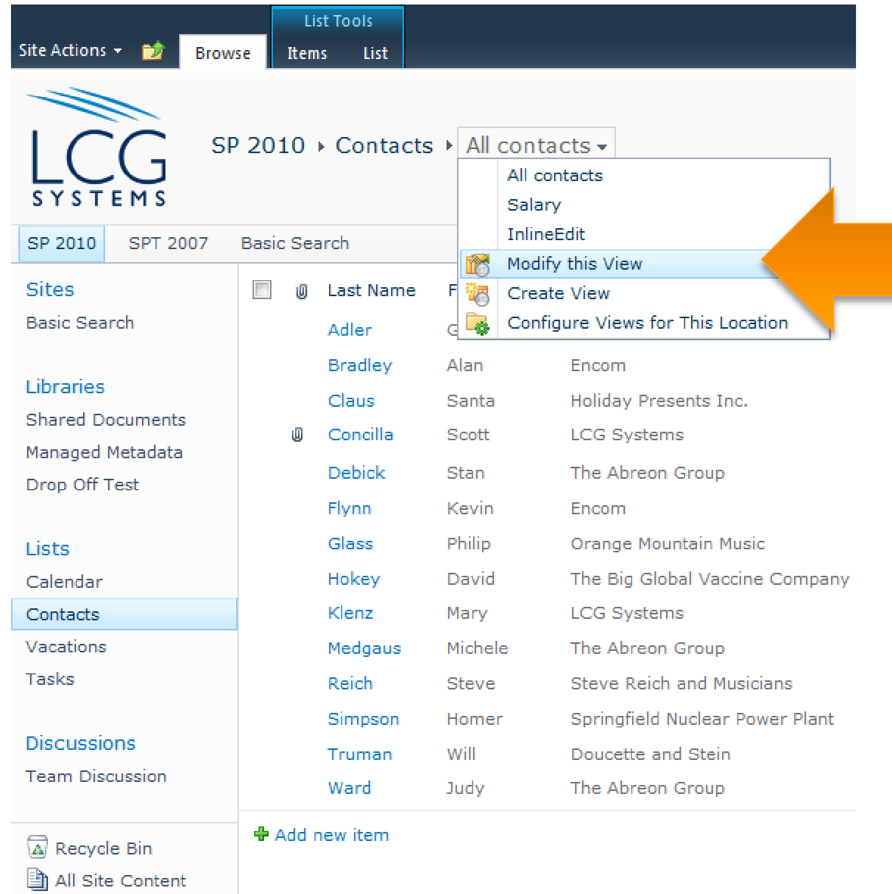
- After **Name** and **Audience**, there are 11 other option areas available for a view.
- Click the plus sign **[+]** next to each area name to expand it and read an explanation of what the option is and can do.

- Columns
- Sort
- Filter
- Inline Editing
- Tabular View
- Group By
- Totals
- Style
- Folders
- Item Limit
- Mobile

Modifying a Current View

Procedure

1. Change the list view to the view you wish to modify.
2. Click the view drop-down at the end of the bread crumb trail and choose **Modify this View**.
3. Make the desired changes and click **OK**.



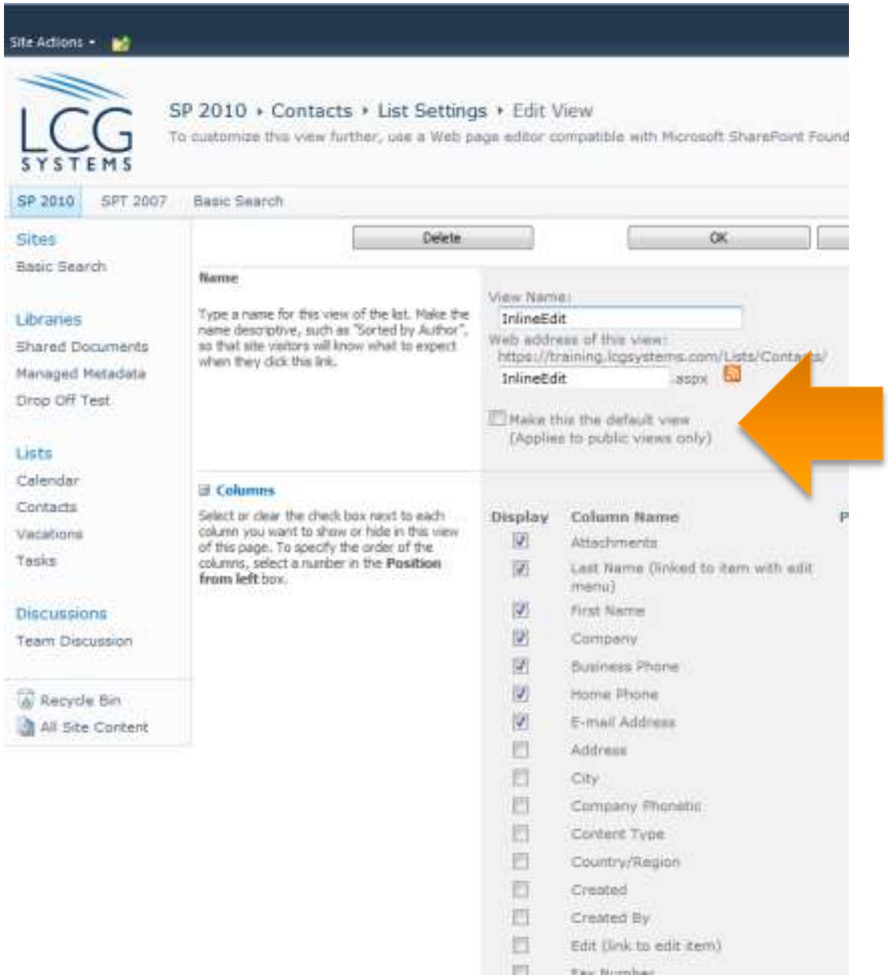
Setting a Default View

- Any **Public** view can be the default view for a list.
  - Personal views cannot be default views.
- This option can be set when a view is created, or altered later.

Setting a Default View

Procedure

1. Either create a new view or modify a current view.
2. In the **Name** section, select the **Make this the default view** check box.
   NOTE: If the view is already the default, the checkbox will not be available.
3. Click **OK**.



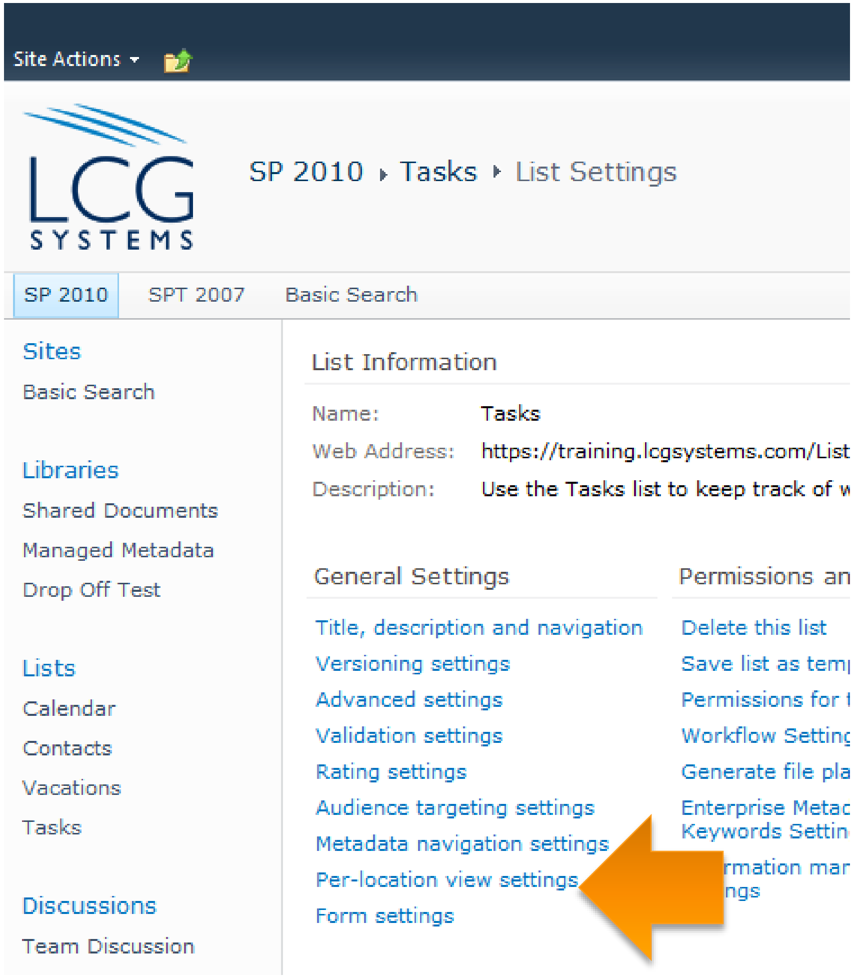
Customizing Available Views

- This option/setting determines if the views available in a folder are unique or inherited from the parent.
- Does not work for personal views.

Customizing Available Views

Procedure

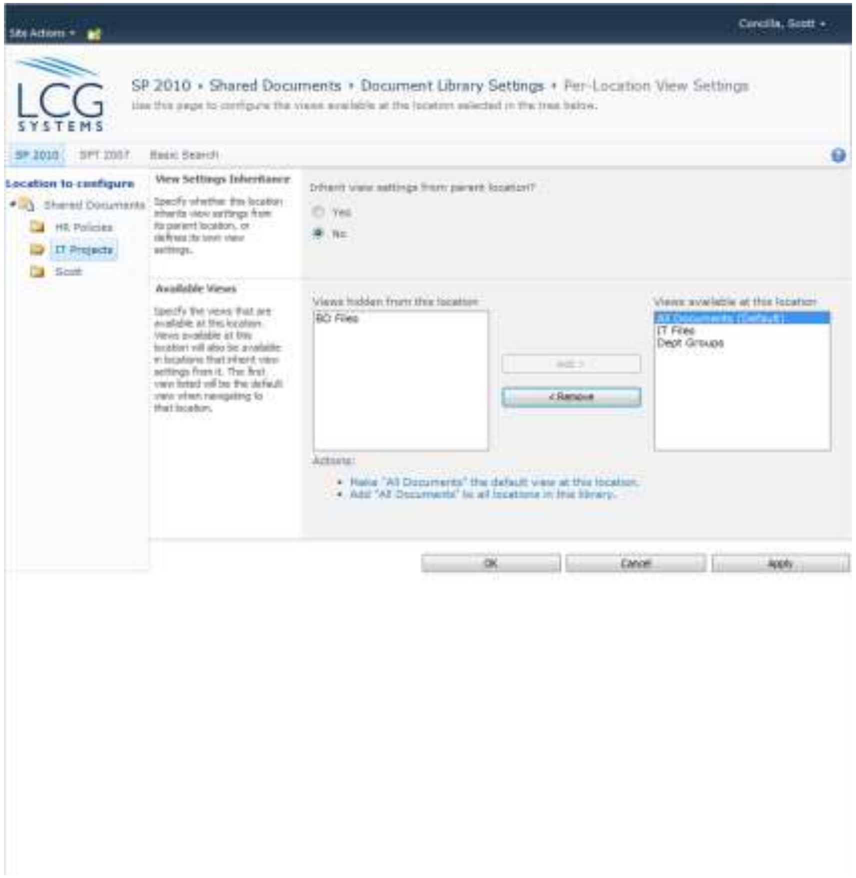
1. Display the **List Settings**.
2. In the **General Settings** category, click **Per-location view settings**.



Customizing Available Views

Procedure (continued)

3. In the **Location to configure** pane on the left, select a folder.
4. In the **View Settings Inheritance** section, select **No**.
5. Use the **Available Views** section to **Add** and **Remove** views.
6. Click **OK** to save.



Managing a List

- Saving a List as a Template
- Deleting a List
- Restoring a List

Saving a List as a Template

- The settings and configuration of a list can be saved as a template to shorten the creation of future, similar lists.
  - This is the fourth "list creation option" that was discussed earlier.

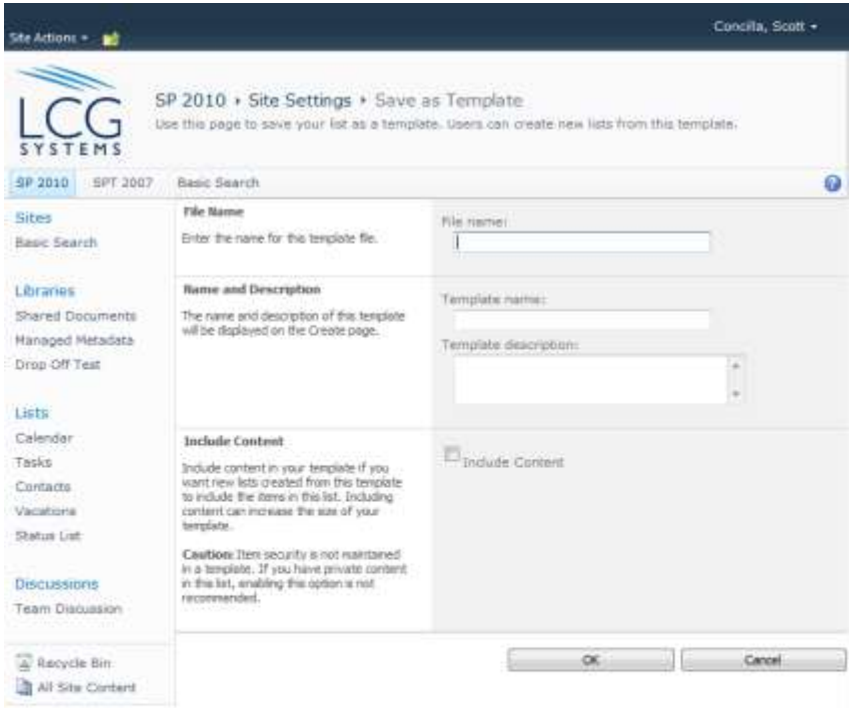
Saving a List as a Template

- Templates can also include content, however, item security and permissions are not maintained in the template.

Saving a List as a Template

Procedure

1. Display the **List Settings**.
2. In the **Permissions and Management** section, click **Save list as template**.
3. Fill out the information and options.
4. Click **OK** to save the template.



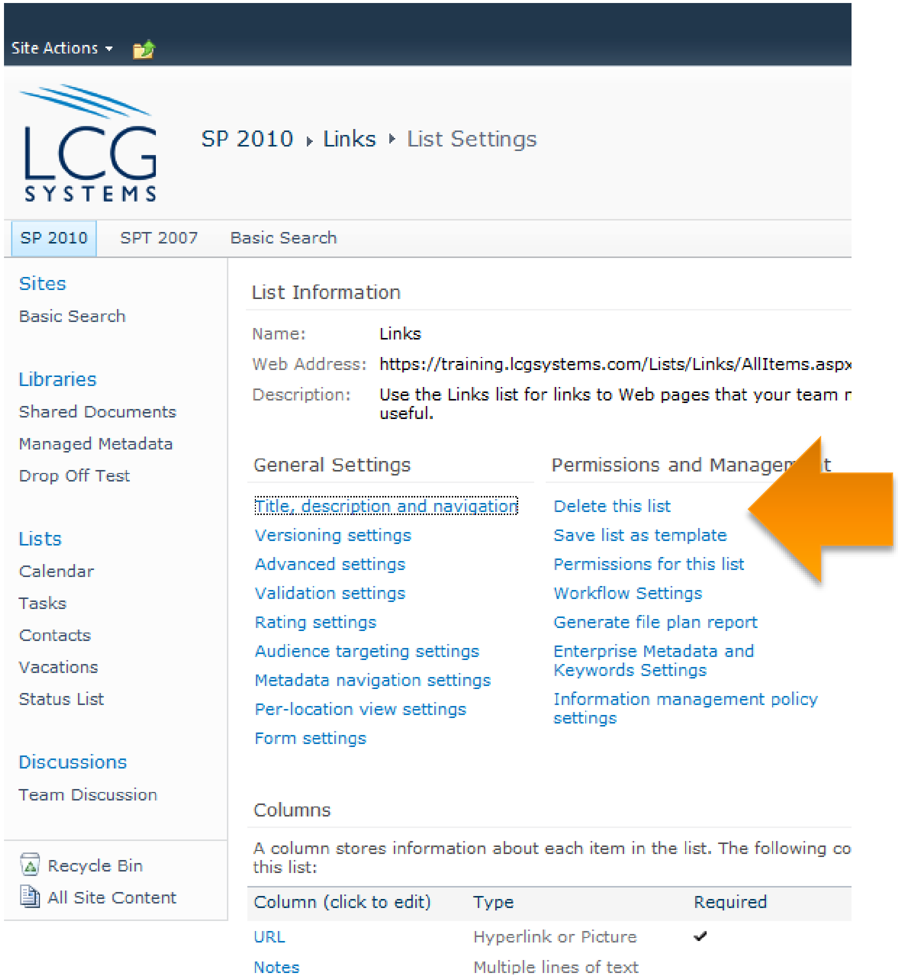
Deleting a List

- If a list is no longer needed or wanted, it can be deleted from the site.
- Deleting a list will also delete all content within the list.

Deleting a List

Procedure

1. Display the **List Settings**.
2. In the **Permissions and Management** section, click **Delete this list**.
3. Click **OK** to confirm or **Cancel** to abort.



Restoring a List

- Lists that have been deleted (either intentionally or accidentally) can be restored to the site.

Restoring a List

- If the list you wish to restore is not in the Site Recycle Bin, first check to make sure you are viewing the correct Site Recycle Bin
  - Every site maintains its own Recycle Bin.

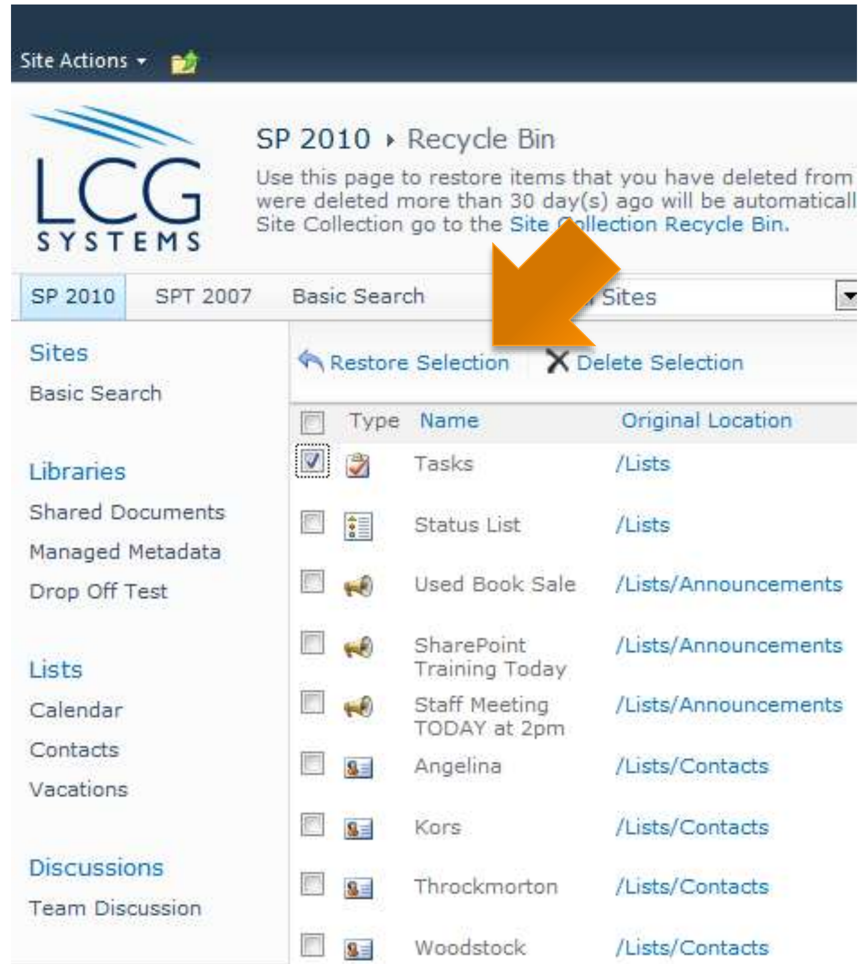
Restoring a List

- If you are still unable to locate the list, you will need to contact your **Site Collection Administrator** and ask them to check the **Site Collection Recycle Bin**.

Restoring a List

Procedure

1. On the Quick Launch menu, select the **Recycle Bin** for the site.
2. Select the check box next to the list to be restored.
3. Click **Restore Selection**.
4. Click **OK** to confirm.



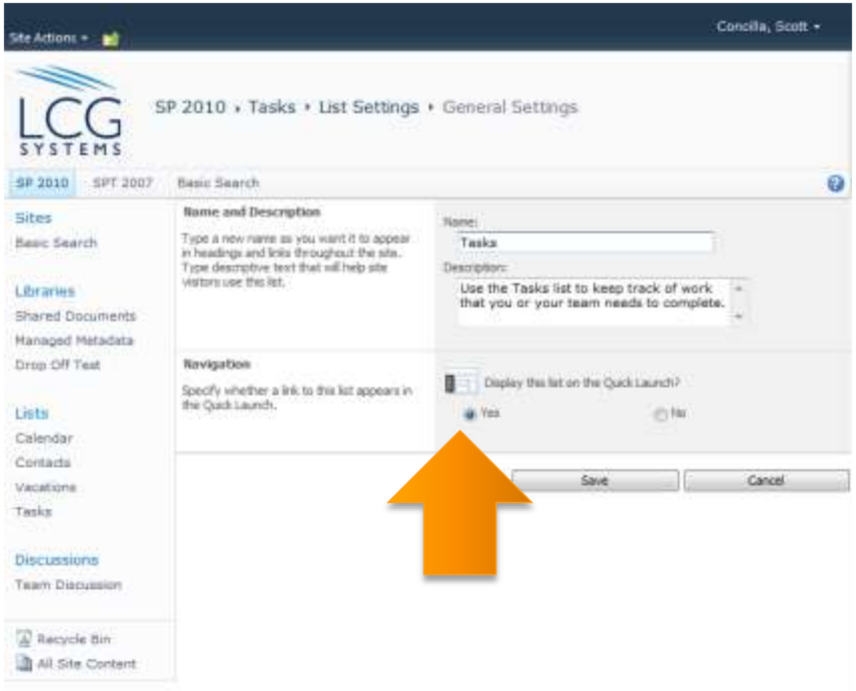
Restoring a List

- If the list that was deleted and then restored was originally listed on the site Quick Launch menu, it is not automatically added back to the Quick Launch menu when restored.

Restoring a List

Procedure

1. Display the **List Settings**.
2. In the **General Settings** section, click **Title, description, and navigation**.
3. In the **Navigation** section, choose **Yes**.
4. Click **Save** when finished.



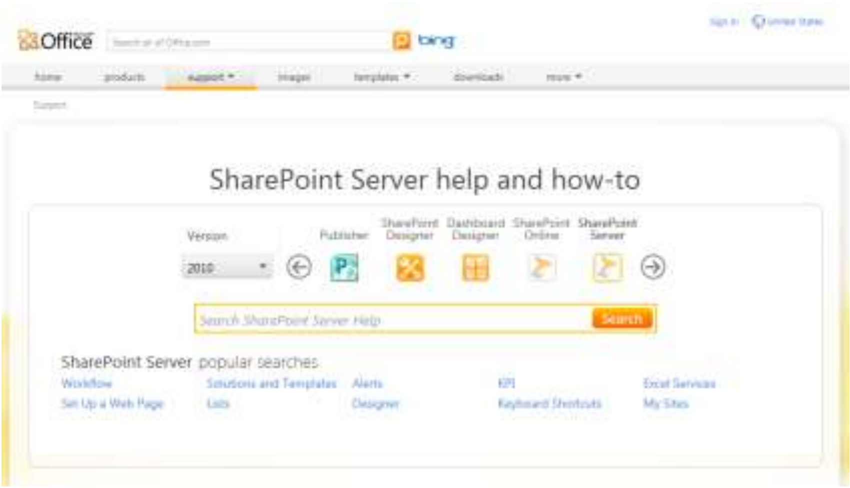
Additional Help

- Microsoft Office Online
- Recommended Books

Microsoft Office Online

office.microsoft.com

1. Select the **Support** menu and choose **All Support**.
2. Make sure the **Version** drop-down displays **2010**.
3. Use right arrow to scroll and select the **<u>SharePoint Server</u>** icon.



Recommended Books

- **SharePoint 2010 Plain & Simple**
  - J. Lightfoot and C. Beckett
  - Microsoft Press
- **The SharePoint Shepherd's Guide for End Users**
  - Robert Bogue
- **SharePoint 2010 User's Guide**
  - S. Bates and T. Smith
  - Apress
- **SharePoint Foundation 2010**
  - O. Londer and P. Conventry
  - Microsoft Press