# SharePoint 2003 User's Guide

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**SharePoint 2003 User's Guide**



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CHAPTER 5

# Template Lists

Creating custom lists for all of your information needs, while powerful and flexible, can become time consuming. To address this, SharePoint comes with built-in standard lists that you can use as templates. These lists greatly reduce the amount of time it takes to design and build all of the facilities you will use to manage data in your Windows SharePoint Services sites and SharePoint Portal Server areas. Many of these templates include enhanced integration with Office 2003 products.

As well as an existing structure of list columns, these list templates come with a number of views intended to make the list items more manageable for your users. These lists still allow you to modify the structure by adding new columns, modifying the settings of existing columns, or removing extra columns that are not appropriate for your list's needs. Managing the views and settings of a list created from a template is performed in the same way you would for a custom list. Refer to Chapter 4 for more details on accomplishing these actions. This chapter will also refer to lists that have been added to a web part page on a site or portal. How to do this is discussed in detail in Chapter 7.

## Standard Lists

SharePoint provides many list templates that are available to use whether you are creating a list in the portal, a team site, a document workspace, or a meeting workspace. These standard lists apply to most situations involving team collaboration and information management. Many of these standard list templates include additional capabilities and integration with other Office System products that you do not get from building custom lists. By understanding these unique features, you can choose the right list and customize it further to make the best use of SharePoint technologies.

We will describe each of these lists and their unique capabilities in this chapter. Before getting into these details, we will give you the steps needed to create a new standard list. To create a new standard list in a Windows SharePoint Services team site or document workspace:

1. Click the Create link on the Site Toolbar.
2. On the Create screen, click the link of your desired template under the Lists section.
3. On the New List screen, enter a name and description for the list.
4. Under the Navigation section, select Yes if you want a link to the list displayed on the Quick Launch menu of the site's home page.
5. Click the Create button.

To create a new standard list in a SharePoint Portal Server area:

1. Click the Manage Content link from the Actions list on the left.
2. On the Document and Lists screen, click the Create link on the toolbar.
3. On the Create screen, click the link of your desired template under the Lists section.
4. On the New List screen, enter a name and description for the list.
5. The Navigation section does not apply to a standard SPS area as there is no Quick Launch menu displayed. You can therefore ignore this option.
6. Click the Create button.

To create a new standard list in a meeting workspace, see the “Meeting Workspace Lists” section later in this chapter.

## Links

The Links list template creates a list you should use when you want to provide a list of links to both external and internal web pages. The list contains a single view, called All Links, which displays all list items along with an Edit column for editing a list item. The columns in the Links list template are shown in Table 5-1.

**Table 5-1.** *Links List Columns*

| Column | Type | Notes |
|---|---|---|
| URL | Hyperlink or Picture | The web address for the link along with the text that should be shown as the name |
| Notes | Multiple lines of text | Long description of the link |

Links lists prove most useful when you add them to the home web part page of the site. (Adding web parts to a page is discussed in Chapter 7.) Displaying your links list on the home page of the site provides users with an easy way to find other web sites relevant to the information in the team site. For example, a site for the company sales team could benefit from links to the corporate web site and sales entry system. Figure 5-1 shows the links list displayed on the home page of a team site.


**Figure 5-1.** *A links list displayed on a site*

### Changing List Item Order

There is no ability to change the order of the list items in a custom list; however, this feature is part of many template lists. The Links list template is one of these lists. This feature is controlled by a setting that can be configured for each view created for the list. When managing a view in the links list, there will be an additional option under the Sort section that lets you turn on and off this feature, which allows users to manually order the items in the list.

To change the order of the links in a links list:

1. Navigate to the links list screen.
2. On the links list screen, click the Change Order link on the toolbar.
3. On the Change Order screen, set the order by changing the numbers in the Position from Top column with smaller numbers being towards the top of the list.
4. Click the OK button.

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■ **Note** When you click a link in the links list, the link opens in the current instance of the browser; therefore you leave the context of your portal. Without technical customization, you cannot have the links launch in a new window unless you right-click the link and choose the Open in New Window option in your browser.

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## Announcements

The Announcements list template allows you to easily create a list of items intended to inform site users of important messages. The list contains a single view called All Items, which displays the title of the announcement as well as the last time it was modified. The columns in the Announcements list template are shown in Table 5-2.

**Table 5-2.** *Announcements List Columns*

| Column | Type | Notes |
|---|---|---|
| Title | Single line of text | Short text that is used as a heading for the announcement. |
| Body | Multiple lines of text | Longer text message of the announcement. |
| Expires | Date and Time | The date when the list item is no longer relevant. This allows views to filter using this date and display only the most recent items. |

Like the links list discussed earlier, the announcements list is often added to the home web part page of a site. Having the announcements list, as shown in Figure 5-2, as one of the first lists displayed on a site allows you to increase your ability to keep users up to date on the latest related news.

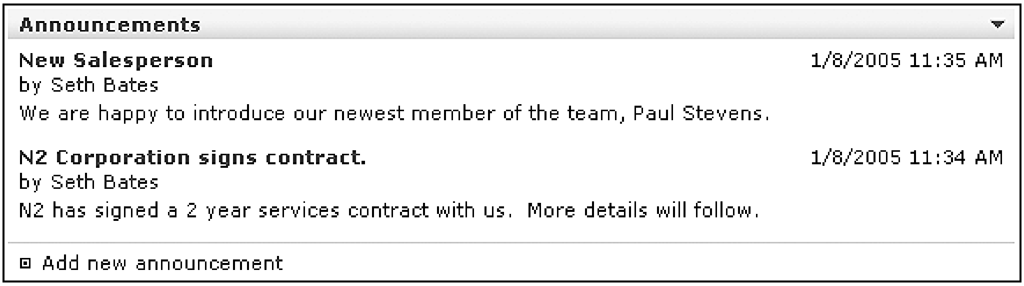


**Figure 5-2.** *The announcements list displayed on a site*

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■**Note** The default view used when the announcements list is added to a web part page filters on the Expires column with an expression of `Expires is greater than or equal to [Today]`. This helps keep the list of announcements displayed short, as list items are not displayed once the Expires date passes.

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## Contacts

The Contacts list template is helpful in maintaining contact information for people that your site users may need to reach. This could include other team members, client contacts, or vendor information. The contacts list, shown in Figure 5-3, contains a single view called All Contacts, which by default displays the last name, first name, company, business phone, home phone, and e-mail address of each contact. The columns in the Contacts list template are shown in Table 5-3.

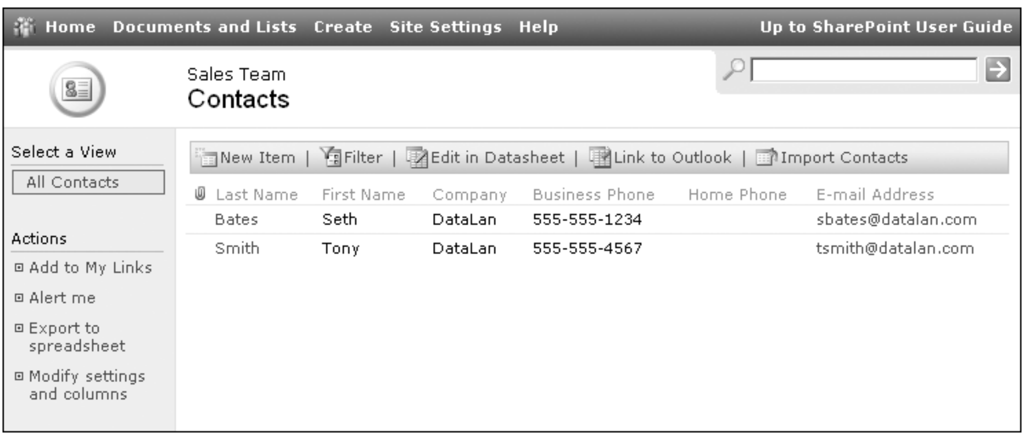


**Figure 5-3.** *The contacts list screen*

**Table 5-3.** *Contacts List Columns*

| Column | Type | Notes |
|---|---|---|
| Last Name | Single line of text | |
| First Name | Single line of text | |
| Full Name | Single line of text | Full Name is not calculated from Last Name and First Name columns. |
| E-mail Address | Single line of text | Accepts any text as no validation is done on the value entered, ensuring that it is a proper e-mail address format. If the value is a proper e-mail address, it is displayed as an e-mail link. |
| Company | Single line of text | |
| Job Title | Single line of text | |
| Business Phone | Single line of text | Accepts any text as no validation is done on the value entered, ensuring that it is a proper phone number format. |
| Home Phone | Single line of text | Accepts any text as no validation is done on the value entered, ensuring that it is a proper phone number format. |
| Mobile Phone | Single line of text | Accepts any text as no validation is done on the value entered, ensuring that it is a proper phone number format. |
| Fax Number | Single line of text | Accepts any text as no validation is done on the value entered, ensuring that it is a proper phone number format. |
| Address | Multiple lines of text | |
| City | Single line of text | |
| State | Single line of text | |
| Postal Code | Single line of text | Accepts any text as no validation is done on the value entered, ensuring that it is a proper postal code format. |
| Country | Single line of text | |
| Web Page | Hyperlink | Link to corporate or personal web page. |
| Notes | Multiple lines of text | |

## Exporting Contacts

The Contacts list template provides many ways in which to integrate your contact information with other applications that use contacts. SharePoint allows you to both import and export contact information from your Windows Address Book. Exporting allows the contacts in your list to be available in such applications as Outlook. Contacts must be exported individually from SharePoint. To export a contact:

1. Navigate to the contacts list screen.
2. On the contacts list screen, open the context menu of the contact you wish to export.
3. Click the Export Contact link.

4. When you are prompted that you are downloading a file, click the Open button.
   a. If you have Outlook installed, a New Contact window will appear with information populated from the SharePoint contact. Click the Save and Close button on the toolbar.
   b. If you do not have Outlook installed, a Contact Properties window will appear. Click the Add to Address Book button and the properties will become editable. Click the OK button to add the contact to your address book.
5. The contact will now appear in your address book.

### Importing Contacts

Exporting contacts is useful when the contact information has already been added to your SharePoint list and you would like that information locally. More often, when initially creating a contacts list, you may have that information in your local address book or in an enterprise Global Address List and want to import it into the SharePoint contacts list. The contacts list screen allows you to perform an import from these sources if you have Office 2003 installed.

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■ **Tip** You can only import contacts that contain an e-mail address. Contacts without e-mail addresses will not be available in the list of contacts to import.

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To import contacts, perform the following steps:

1. Navigate to the contacts list screen.
2. On the contacts list screen, click the Import Contacts link on the toolbar.
3. On the Select Users to Import dialog box, select an address list from the Show Names From The drop-down list. This will contain all local address books along with enterprise address lists for your organization.
4. Select a user or group from the list. Selecting a group will import all members of the group into the contacts list.
5. Click the Add button.
6. Repeat steps 3 through 5 for each user you wish to import into your SharePoint contacts list.
7. Click the OK button.
8. The list will refresh and contain the newly imported contacts.

**Caution** There is no synchronization between exported or import contacts and SharePoint contacts lists. If you make modifications to the contact in SharePoint, it will not be modified in your address book and vice versa. You must make the modification in both places or export/import the contact again. See the next section, “Linking Contacts Lists with Outlook,” for more enhanced Outlook integration.

## Linking Contacts Lists with Outlook

In addition to importing and exporting contacts to your Windows Address Book, SharePoint allows you to link the contacts list with Outlook 2003. Linking a SharePoint contacts list with Outlook creates a contacts folder in Outlook that displays contact information retrieved from SharePoint. The list of contacts is read-only when in Outlook, so all modifications must be performed in the SharePoint contacts list. This ensures that the information is centrally managed yet still available for use by everyone within Outlook.

To link a contacts list with Outlook:

1. Navigate to the contacts list screen.
2. On the contacts list screen, click the Link to Outlook link on the toolbar.
3. You are prompted that Outlook does not recognize the site that the contacts list is on, and it asks you to verify that you want to add the contacts list to Outlook. Click the Yes button.
4. The linked list will display as a new folder in the Other Contacts section of your Outlook contacts as shown in Figure 5-4.

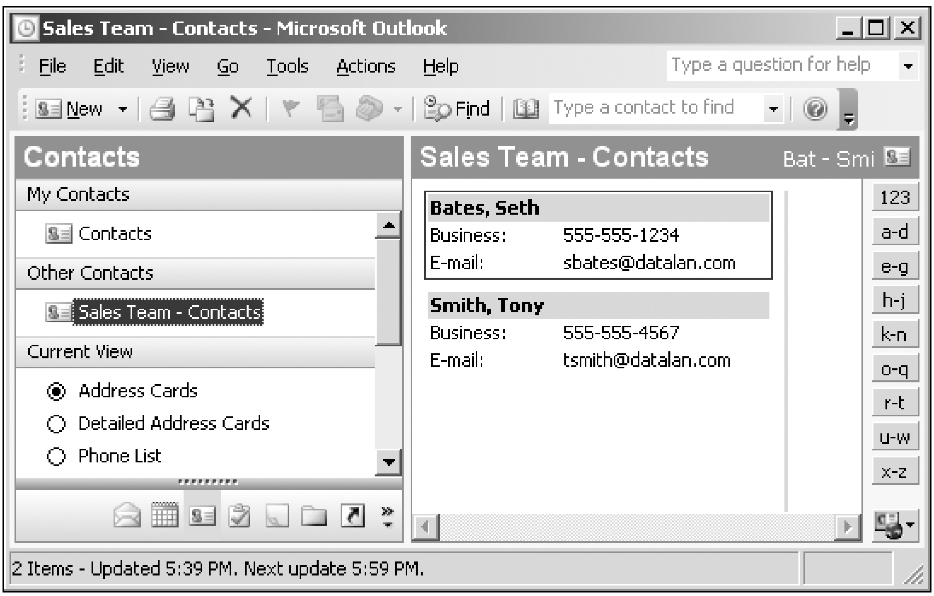


**Figure 5-4.** *A linked contacts list in Outlook*

If you edit a contact in Outlook that has been linked from SharePoint, you are told that the item is read-only. Outlook allows you to save a copy of the contact in your default contacts list where you can make changes, but the items are not linked to SharePoint. The best place to make changes to the contact information is in the SharePoint contacts list, as the new information will be presented each time you open the list in Outlook. Outlook caches a local copy of the contacts list so that, even if you are not able to connect to SharePoint, you can still see the contact information as of the last time you viewed the list from Outlook.

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■ **Caution** If you have Office 2003 installed and still cannot import/export or link contact information, your installation may not be complete. Have an administrator ensure that the Windows SharePoint Services Support component of Office 2003 has been installed and that Outlook is your default e-mail client.

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## Events

The Events list template is one of the most feature-rich list templates available, allowing you to maintain lists of events within a team site or portal area. Some common uses for the Events list template include tracking meetings, deadlines, or milestones. The Events list template is further enhanced by features such as recurring events and integration with SharePoint workspaces and Outlook 2003, all of which are discussed in the upcoming text. Events list items are based on dates and include the columns shown in Table 5-4.

**Table 5-4.** *Events List Columns*

| Column | Type | Notes |
|---|---|---|
| Title | Single line of text | |
| Begin | Date and Time | Starting time for the event. |
| End | Date and Time | Ending time for the event. |
| Description | Multiple lines of text | Long text description of the event. |
| Location | Single line of text | Where the event will take place. |
| Recurrence | Special | Controls whether the event occurs multiple times and when. See the “Recurrence” section. |
| Workspace | Special | Links to an associated meeting workspace if one has been created for the event. |

The Events list template contains several default views, allowing the users to display the list items in various ways. These views are listed in Table 5-5. Remember that, just like all lists, you can still customize the events list, shown in Figure 5-5, by adding or editing fields and creating additional views to display the events in more meaningful ways to your users.

**Table 5-5.** *Events List Views*

| View | Description |
|---|---|
| All Events | The default view, it displays all items in the list. Recurring events are displayed as a single list item. |
| Calendar | Displays all events in a calendar view type, allowing the user to graphically see the events in the list. |
| Current Events | Displays all events that occur on the current date and any dates in the future. Each instance of a recurring event is shown separately. |

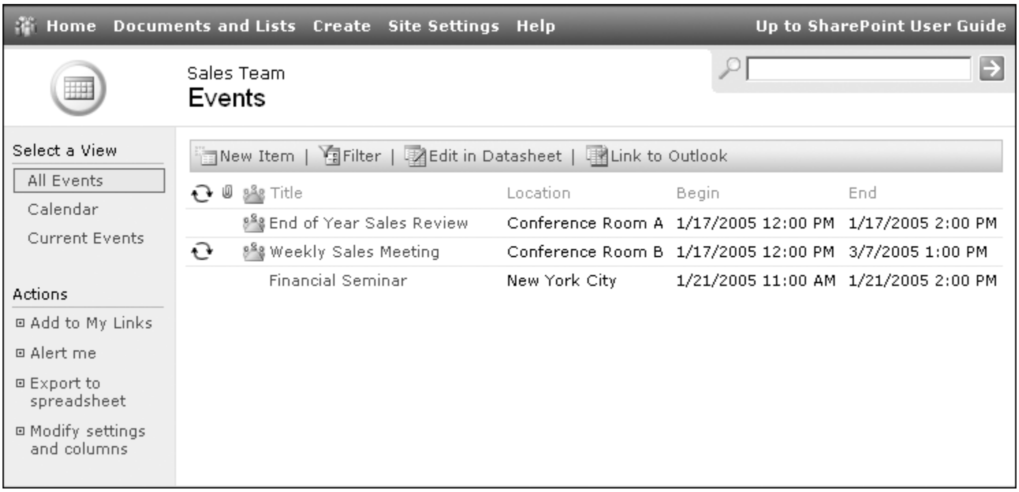


**Figure 5-5.** *The events list*

## Recurrence

A unique aspect of items in the events list is the ability to mark them as recurring events. A recurring event is one that happens more than once over a time period, like a weekly sales meeting. When creating a new event in the events list or editing an existing event, you are given the ability to determine its recurrence.

The event's recurrence is determined by a time period, a pattern, and a date range. Each time period is associated with its own available pattern settings that let you precisely determine how often the event occurs. These time periods and patterns are shown in Table 5-6. The date range consists of a start date and an ending. Available ending types for a recurring event are a specific date, a number of occurrences, or an option for no end date to the recurrence.

**Table 5-6.** *Recurrence Time Periods and Patterns*

| Time Period | Pattern |
|---|---|
| Daily | Every X days (example: every 2 days) |
| Weekly | Every X weeks and on which days of the week the event occurs (example: every 1 week on Monday, Wednesday, and Friday) |
| Monthly | Day X of every Y month (example: day 1 of every 3 months)<br>or<br>The ordered weekday of every X month (example: the second Monday of every 2 months) |
| Yearly | None |

### Recurring Events in Views

When an event is recurring, the first column in the All Events view will contain an icon with two circular arrows. You can see an example of this in Figure 5-5. The special column used for this is the Recurrence column, which is available when managing views.

A recurring event is displayed as a single list item in the All Events view, but the Current Events view displays each occurrence of a recurring event as a separate list item. You can display each occurrence of a recurring event separately in your custom views using a new view type, Standard View with Expanded Recurring Events, inherent only to events lists.

As discussed in Chapter 4, creating a new view takes you to a screen displaying the available view types. When you create a new view in an events list, there will be a link for the Standard View with Expanded Recurring Events view type. This view type only allows you to specify column, filter, style, and item limit settings but displays each occurrence of a recurring event separately in the list. This can be seen in Figure 5-6, which is displaying the same list shown in Figure 5-5 but using the Current Events view.

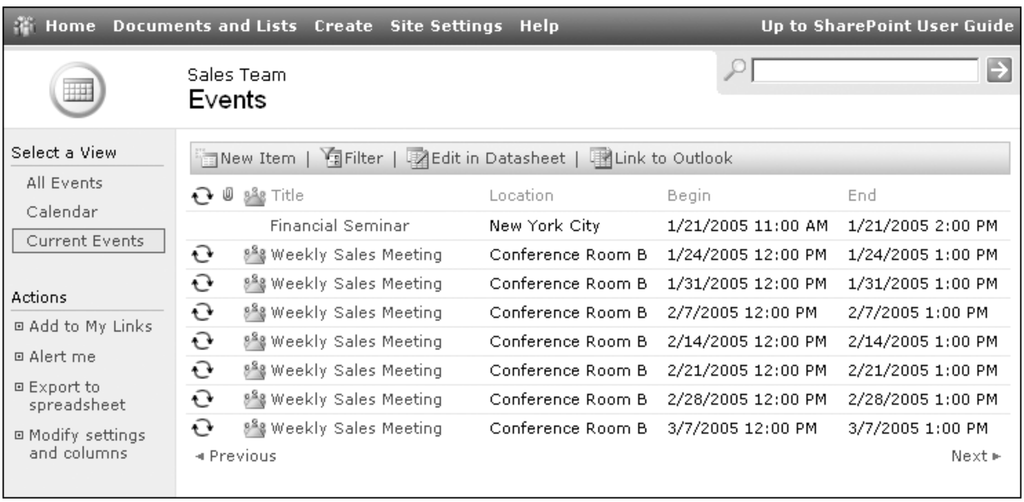


**Figure 5-6.** *The Current Events view displays each event occurrence.*

When you choose to view a recurring event from the Calendar view, the Current Events view, or any other view that displays expanded recurring events, you are looking at an individual occurrence of that event. You can notice the difference by the options in the toolbar of the View Item or Edit Item screens. When you are viewing an occurrence, there will be an additional link in the toolbar called Edit Series. In this case, the Edit Item link allows you to edit the specific occurrence of an event that you are currently viewing, while the Edit Series link allows you to make modifications to the recurring event that the item is an instance of. Clicking the Edit Series link takes you to the same screen that you would go to when choosing the Edit Item link from the context menu of a list item in a standard view like the All Events view.

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■ **Note** Editing a single occurrence of a recurring event will cause a new recurring events list item to be created based on the updated information. The new event is still associated with the original series but will be presented separately in views based on the standard view type such as All Events.

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### Exporting Events

Like the contacts list, the events list allows you to export list items from SharePoint. The events list exports events list item information in a calendar information file that Outlook can then import. Events must be exported individually from SharePoint, and recurring events can only be exported one occurrence at a time. To export an event:

1. Navigate to the events list screen.
2. On the events list screen, open the context menu of the event you wish to export.
3. Click the View Item option.
4. On the Item screen, click the Export Event link in the toolbar.
5. When you are prompted that you are downloading a file, click the Open button.
6. A new Outlook appointment window will appear with information populated from the SharePoint event. Click the Save and Close button on the toolbar.
7. The event will now appear in your default calendar.

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■ **Caution** There is no synchronization between exported events and SharePoint events lists. If you make modifications to the event in SharePoint, it will not be modified in your Outlook calendar and vice versa.

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### Linking Events Lists with Outlook

Another feature of the Events list template that is not available from custom lists is the ability to view the events information through Outlook 2003. Similar to the link feature in a contacts list, linking a SharePoint events list with Outlook creates a new calendar in Outlook. The list of events is read-only when in Outlook, so all modifications must be performed in the SharePoint events list. This ensures that the information is the same when displayed in both places. Linking events lists with Outlook can allow you to easily view a calendar of events such as your company's training schedule or scheduled client visits.

To link an events list with Outlook:

1. Navigate to the events list screen.

2. On the events list screen, click the Link to Outlook link on the toolbar.

3. You are prompted that Outlook does not recognize the site that the events list is on, and it asks you to verify that you want to add the events list to Outlook. Click the Yes button.

4. The linked list will display as a calendar in the Other Calendars section of Outlook as shown in Figure 5-7. To display your calendars within Outlook, select the Calendar option from the Go application menu.

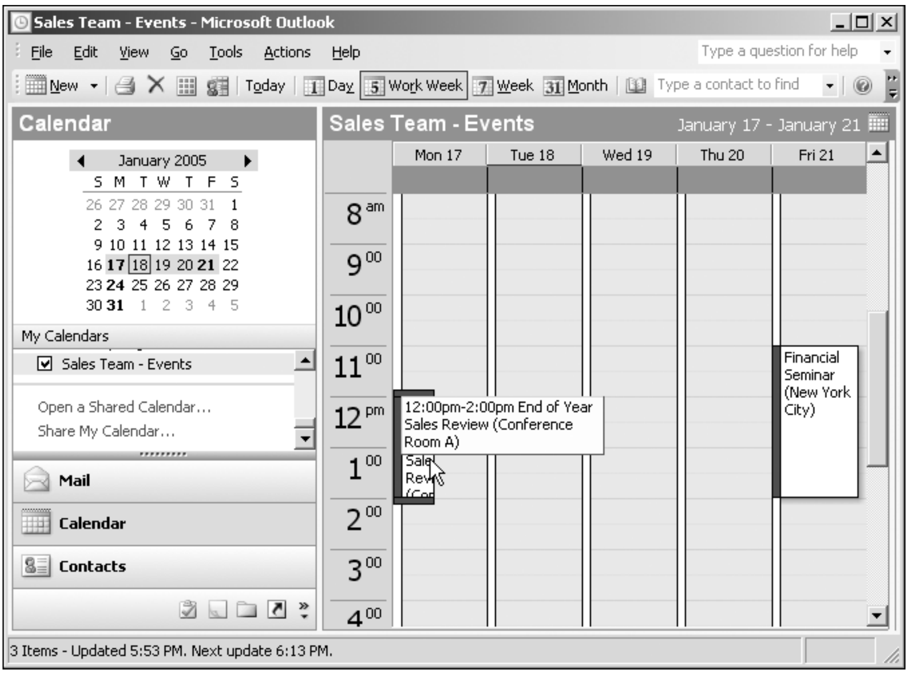


**Figure 5-7.** *A linked events list in Outlook*

You cannot edit an event in Outlook that has been linked from SharePoint. Outlook allows you to save a copy of the event to your default calendar where you can then make changes. The only place to make global changes to the events information is in the SharePoint events list, as the new information will be displayed each time you view the calendar in Outlook. Other users of the events list will also see the most up-to-date information, ensuring that the latest changes are available to every user. Outlook caches a local copy of the events list calendar so that even if you are not able to connect to SharePoint, you can still see the event information as of the last time you viewed the calendar from Outlook.

**Caution** If you have Office 2003 installed and still cannot access events list information, your installation may not be complete. Have an administrator ensure that the Windows SharePoint Services Support component of Office 2003 has been installed.

### Workspaces

A useful feature of the events list is the ability to integrate directly into meeting workspaces from the events list items. The meeting workspaces you read about in Chapter 3 can be created from events in the events list, resulting in additional navigation and information available in both the meeting workspace and events list item.

When adding or editing an event, you will see a workspace checkbox near the bottom of the screen. Checking this box will create a meeting workspace and associates the workspaces with your event. You are able to create a new meeting workspace or associate the event with an already existing workspace under the current site if a workspace was already created without the use of the events list.

To create a meeting workspace for an existing events list item:

1. Navigate to the events list screen.
2. On the events list screen, activate the context menu for an event and click the Edit Item link.
3. On the Item screen, check the Workspace checkbox.
4. Click the Save and Close link on the toolbar.
5. On the New or Existing Meeting Workspace screen, if a meeting workspace already exists under the current site, a Create or Link section will be displayed. Make sure the Create a New Meeting Workspace option is selected. Selecting the Link to an Existing Meeting Workspace option allows you to associate the event with a meeting workspace you have already created by selecting it from the list.
6. The title and web address is already populated using the name of the event. Enter a description.
7. Click the OK button.
8. On the Template Selection page, select the Meeting Workspace template to use for this event. These templates are described in Chapter 3.
9. Click the OK button.

After following these steps, you are brought to the newly created meeting workspace. The meeting workspace's integration with the events list can be seen underneath the title of the workspace. The date and time of the event is retrieved from the events list and a Go to Events link is displayed, allowing you to quickly navigate back to the list. Also, you are automatically added to the attendees list, discussed later in this chapter, as the organizer of the meeting.

If you click the Go to Events link so that the events list is displayed, you will see that the list item now displays an icon of a meeting in the All Events view. This can be seen earlier in Figures 5-5 and 5-6. A link is also displayed in the View Item screen for the event. Clicking either the icon or link takes you to the meeting workspace shown in Figure 5-8.

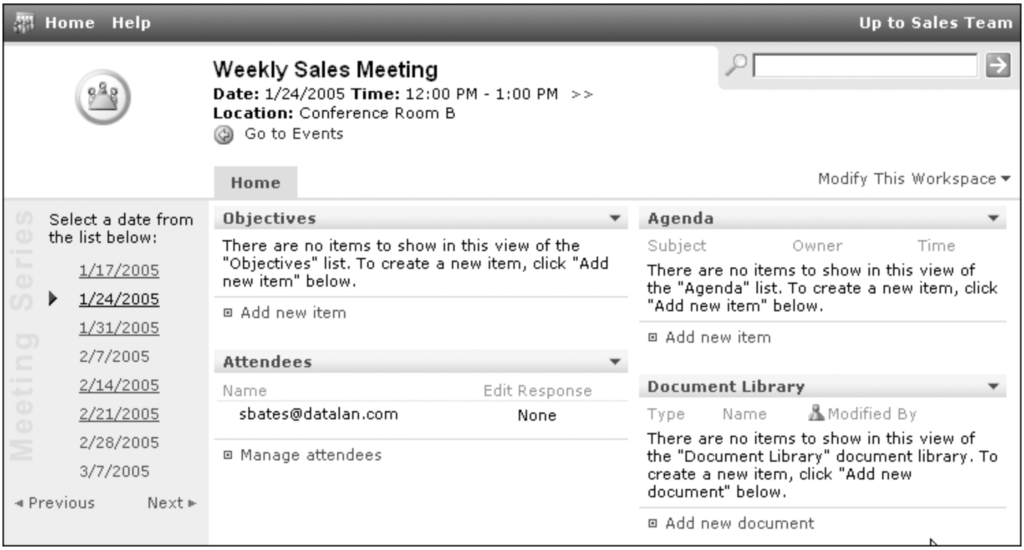


**Figure 5-8.** *A meeting workspace created from a recurring event*

### Workspaces in Series

Creating a meeting workspace for a recurring event adds an additional level of functionality to the meeting workspace. The workspace is created using the same steps given in the previous section, but when the workspace is displayed, you will notice a new navigation menu on the left. This navigation menu, shown in Figure 5-8, allows you to navigate to different displays of the workspace based on each occurrence of the event.

These instances of the workspace are said to be "in series" as they are all related to the same event. Content added to one instance of the series does not necessarily display in other instances. This is determined by a setting in the workspace lists. This setting is described in the "Meeting Workspace Lists" section later in this chapter.

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■ **Tip** You can specify that lists share content between series by changing an option in their List Settings screen. How to do this in detail is shown later in the "Meeting Workspace Lists" section of this chapter.

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## Tasks

The Tasks list template is one of the most commonly used templates in team collaboration sites. The tasks list is used to assign and manage tasks for site users. The columns in the Tasks list template are shown in Table 5-7. Remember that you can customize the columns, including the available options for Choice columns, in order to tailor your list to your current business terminology.

**Table 5-7.** *Tasks List Columns*

| Column | Type | Notes |
|---|---|---|
| Title | Single line of text | |
| Priority | Choice | Default options include High, Normal, and Low |
| Status | Choice | Default options include Not Started, In Progress, Completed, Deferred, and Waiting on someone else |
| % Complete | Number | Only allows numbers from 0 to 100 |
| Assigned To | Lookup | Choose from users of the current WSS site or SPS area |
| Description | Multiple lines of text | |
| Start Date | Date and Time | |
| Due Date | Date and Time | |

■ **Note** If the site's security is based on Active Directory groups, individual users will not be displayed in Lookup columns like Assigned To until they have visited the site.

The Tasks list template contains many different default views designed to provide users with easy ways in which to display the tasks they are interested in. These views are listed in Table 5-8.

**Table 5-8.** *Tasks List Views*

| View | Description |
|---|---|
| All Tasks | The default view, it displays all items in the list. |
| My Tasks | Displays title, status, priority, % complete, and due date for all of the current user's tasks. This is accomplished by using a filter of `Assigned To is equal to [Me]`. |
| Due Today | Displays title, assigned to, status, priority, and % complete for all of the tasks due on the current date. This view uses a filter of `Due Date is equal to [Today]`. |
| Active Tasks | Displays title, assigned to, status, priority, % complete, and due date for all active tasks. Active tasks are determined by a filter of `Status is not equal to Completed`. |
| By Assigned To | Similar to the All Tasks view except that it sorts the list items based on the Assigned To column. |

The item-level security described in Chapter 4 is particularly useful to ensure that users cannot modify tasks that are not their responsibility. SharePoint does not provide the ability to link a tasks list to your tasks in Outlook. Aside from the extra views that the template gives you, there is no functionality on the tasks list screen, as shown in Figure 5-9, which is not available when using custom lists. You could build a list identical to the tasks list by using the features available for custom lists, but it is provided to make creating this common list type easier.

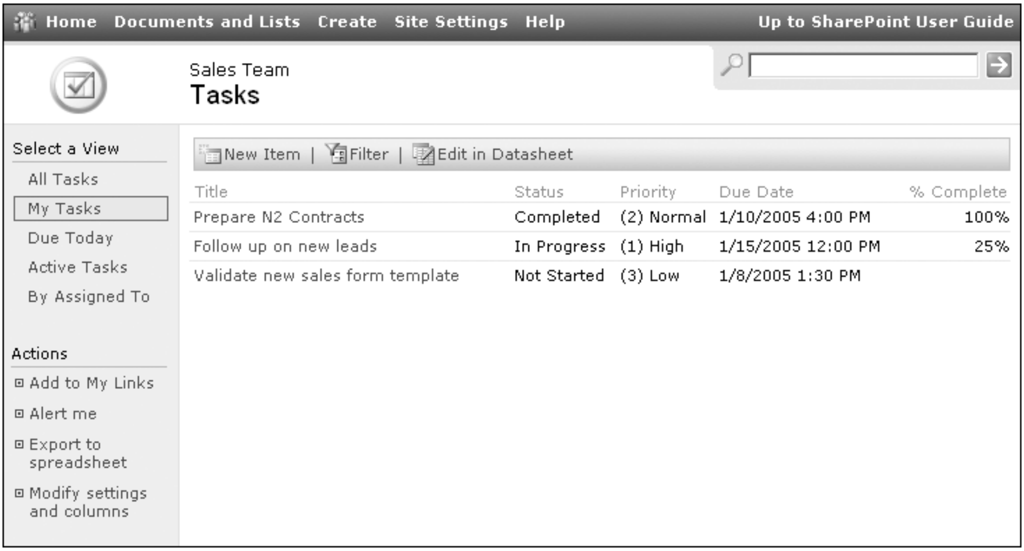


**Figure 5-9.** *The tasks list*

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■ **Note** A drawback of storing your tasks in multiple tasks lists on SharePoint sites is that there is no built-in way to see all of your tasks in a single list. There are third-party products that address this issue by providing rollup functionality of all of your tasks in SharePoint.

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## Issues

Similar to the Tasks list template, the Issues list template is useful for creating a list of items where a user must take action. The issues list is best suited as a list of risks that must be mitigated or business opportunities that must be managed. The columns in the Issues list template are shown in Table 5-9.

**Table 5-9.** *Issues List Columns*

| Column | Type | Notes |
|---|---|---|
| Title | Single line of text | |
| Assigned To | Lookup | Choose from users of the current WSS site or SPS area. |
| Status | Choice | Default options include Active, Resolved, and Closed. |
| Category | Choice | Default options include Category1, Category2, and Category3. Make sure to edit these options when creating your issues list. |
| Priority | Choice | Default options include High, Normal, and Low. |
| Comment | Multiple lines of text | |
| Due Date | Date and Time | |

Like some other list templates, the Issues list template contains default views designed to provide users with easy ways in which to display the issues more relevant to them. These views are listed in Table 5-10.

**Table 5-10.** *Issues List Views*

| View | Description |
|---|---|
| All Issues | The default view, it displays all items in the list. |
| My Issues | Displays title, status, priority, category, and due date for all of the current user's tasks. This is accomplished by using a filter of `Assigned To is equal to [Me]`. |
| Active Issues | Displays title, assigned to, status, priority, category, and due date for all active tasks. Active tasks are determined by a filter of `Status is equal to Active`. |

The issues list comes with the ability to notify users via e-mail when they have been assigned a list item or when a list item they own has been modified. This is the only list template that contains this feature. To enable this notification, set Email Notification to Yes on the General Settings screen of the issues list.

## Related Issues

The issues list allows for relationships between list items, which is not available with custom lists or other list templates. Each issue includes a list of related issues from the same list. These related issues are displayed on the View Item screen as links to the related issue's View Item screen. The View Item screen for an issue is displayed in Figure 5-10.

The Add Item and Edit Item screens allow you to manage this relationship. A special column called Add Related Issue is used to enter new related issues. This column is not displayed in any views and does not contain data itself; it is only used to enter the related Issue ID on the Add Item or Edit Item screen. Adding related issues must be done one at a time, saving the list item for each related issue. A remove link is provided alongside each related issue in the Edit Item screen, allowing you to remove that issue from the list of related issues for the currently displayed issue.

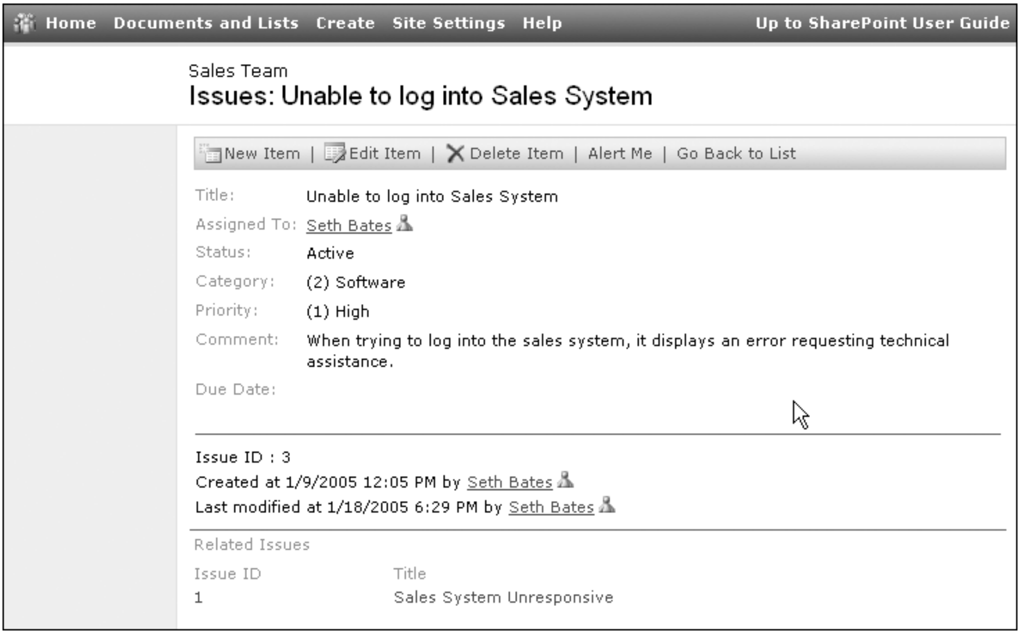


**Figure 5-10.** *An issue with related issues*

## Current Issues

Editing list items in an issues list causes SharePoint to handle the underlying data differently than it does other lists. In all other lists, when you edit a value in a list, SharePoint saves the changes you have made to the existing list item. This is not how SharePoint handles the editing of issues. When you edit a list item in an issues list and save the changes, a new list item is created with the most recent information for the issue, and the history of the issue information is displayed on the View Item page. You then have multiple list items that are really the same issue.

The issues list does not display all copies of each issue, only the most recent list item. This is accomplished by using a special column called Current. This column is not displayed to the user; instead SharePoint uses this column to mark which list item for an issue is the most recent. All views in the Issues list template contain a filter of `Current is equal to Yes`, which causes the view to only display the most recent versions of the issues.

---

■ **Tip** Always remember to include the `Current is equal to Yes` filter when creating views for an issues list unless you need to see all historical versions of the issues.

---

## Reports

Another aspect unique to the issues list is the inclusion of built-in reports. Although the standard reports are fairly simple in nature, they can prove to be very helpful in managing and monitoring a potentially large issues list such as a software defect tracking list or help desk call tracking list. The Issues list template comes with four issues list reports. Each report has its own specific settings, as shown in Table 5-11, that allow you to filter the data that will be presented in the report.

**Table 5-11.** *Issues List Reports*

| Report | Description | Settings (Available Filters) |
|---|---|---|
| Issues by category | Displays the number of issues in each category | Category<br>Status |
| Issues by person | Displays the number of issues in each category for each user | Assigned To<br>Status |
| Issues created over a date range | Displays the number of issues created on dates in a date range | Start Date<br>End Date<br>Category |
| Issues for a date range | Displays the number of issues that exist on dates in a date range | Start Date<br>End Date<br>Category<br>Assigned To<br>Status |

To view a report, perform the following steps:

1. Navigate to the issues list screen.
2. On the Issues screen, click the View Reports link in the Actions list.
3. On the Issues–Reports screen, click the link of the report type that you want to view.
4. On the Report screen, change the settings in the list on the left to set how the report will filter the issues for the report.
5. Click the Create Report button and a report will display similar to the one shown in Figure 5-11.

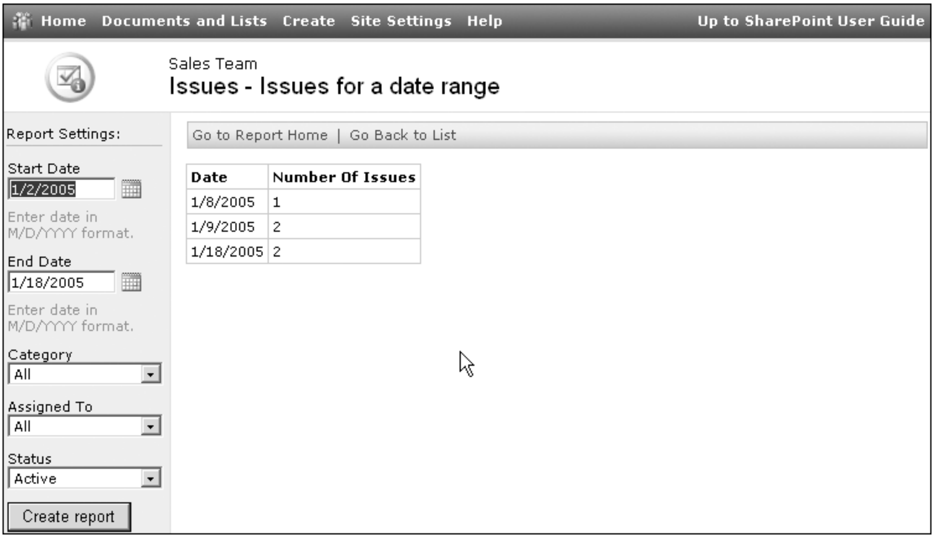


**Figure 5-11.** *Report showing issues for a date range*

# Meeting Workspace Lists

In addition to the standard lists discussed previously, meeting workspaces provide more list templates not available in Windows SharePoint Services team sites or document workspaces. These additional list templates are designed to enhance a meeting workspace that is focused on organizing and managing a meeting event. While they do not have the additional integration with Office 2003 that some of the standard lists have, the meeting workspace lists do have some features not found in other lists.

Creating lists in a meeting workspace is a little different from creating them in team sites or document workspaces. Meeting workspaces do not include the Create link that is prominently displayed at the top of team sites to allow easy creation of lists. Instead, you must create new lists via the Modify This Workspace link. This link, and the related Modify Shared Page link that you see in a team site or document workspaces, is used to manage web parts and web part pages. Web parts and web part pages are discussed in more detail in Chapter 7.

To create a new list in a Windows SharePoint Services meeting workspace:

1. Click the Modify This Workspace link on the top-right side of the workspace.
2. From the context menu that is displayed, click the Add Web Parts link.
3. On the Create Lists pane, drag the type of list that you want to create onto the web part page and the list is created. If the list template you want is not displayed on the pane, click the Show All Lists link and continue with these steps.
4. On the New List screen, enter a name and description for the list.
5. Click the Create button.

### Lists for Meetings in Series

If you followed the preceding steps to create a list using the Show All Lists link, you may have noticed a new setting when creating a list as well as a setting that is shown in team site lists which is missing in workspaces. Since there is no Quick Launch menu for a meeting workspace like there is in a team site, there is no Navigation section on the New List page when creating new lists.

Instead of the Navigation section, a section titled Share List Items Across All Meetings (Series Items) is displayed. Selecting Yes for this setting makes the list and its contents shared among workspaces in the same series. Workspaces created for recurring events as described in the "Events" section earlier in this chapter are able to use this setting. Each workspace created for the recurring event is said to be in the same series.

When you select to share the item, any item added to a list in one workspace in the series will be displayed to users of all workspaces in the series. This setting is available for all lists created in a meeting workspace, not just the list templates described in the upcoming sections.

If you do not select Yes for Sharing List Items Across Meetings in a recurring meeting workspace, lists will have an additional link in the toolbar. This link will allow you to display list items for the current meeting occurrence or display a consolidated view of list items from all occurrences of the meeting workspace. The link in the toolbar toggles between This Meeting and All Meetings.

## Agenda

The Agenda list template creates a list that should be used in meeting workspaces to manage the topics to be discussed and when during the meeting they will be the focal point. The columns in the Agenda list template are all text columns rather than being more specific column types such as Date and Time. The columns in the Agenda list template are shown in Table 5-12.

**Table 5-12.** *Agenda List Columns*

| Column | Type | Notes |
|---|---|---|
| Subject | Single line of text | |
| Owner | Single line of text | Text column type allows any text entry rather than selection of site users like other list templates provide. |
| Time | Single line of text | Text column type allows any text entry rather than specific date and time values. |
| Notes | Multiple lines of text | |

The agenda list contains two views to allow users to best review and manage the meeting agenda. These views are described in Table 5-13.

**Table 5-13.** *Agenda List Views*

| View | Description |
|---|---|
| All Items | The default view, it displays all items in the list. Items are displayed with a custom style that shows the Notes column underneath the other three columns in the list. |
| My Items | Displays items that the current user has created. This is accomplished by using a filter of `Created By is equal to [Me]`. |

### Changing List Item Order

Many of the meeting workspace list templates, including the Agenda list template, allow you to change the order of the items in the list. This is available to all views of the list where you have specified to allow users to order items in the Sort section of the List screen. This functionality can also be seen in the Links list template described in the "Links" section near the beginning of this chapter.

To change the order of the links in an agenda list:

1. Navigate to the agenda list screen.
2. On the agenda list screen, click the Change Order link on the toolbar.
3. On the Change Order screen, set the order by changing the numbers in the Position from Top column with smaller numbers being towards the top of the list.
4. Click the OK button.

■ **Note** Changing the list item order changes the order of the items for all views of a list. There is no way to change the order of the list items differently for each view.

## Decisions

The Decisions list template creates a list that can be used to record decisions made during the course of a meeting. This allows decisions made during the course of the meeting to be recorded as they are made and makes these decisions available for review after the meeting. The columns in the Decisions list template are shown in Table 5-14.

**Table 5-14.** *Decisions List Columns*

| Column | Type | Notes |
|---|---|---|
| Decision | Single line of text | |
| Contact | Single line of text | Text column type allows any text entry rather than selection of site users. |
| Status | Choice | Default options include Final, Pending Approval, and Proposed. |

The decisions list contains two different views in which users can display decisions list items. Like many other meeting workspace lists, the views in the Decisions list template allow the user to change the display order of the list items. These views are described in Table 5-15.

**Table 5-15.** *Decisions List Views*

| View | Description |
|---|---|
| All Items | The default view, it displays all items in the list. |
| My Items | Displays items that the current user has created. This is accomplished by using a filter of `Created By is equal to [Me]`. |

## Objectives

The Objectives list template is used to create a list of goals for the meeting. Most meeting workspace templates contain an objectives list built from the Objectives list template. The objectives list is an extremely simple list with only a single column, shown in Table 5-16, and a single view that displays all list items. As with most other meeting workspace list templates, the objectives list provides the ability for the user to change the display order of the list items.

**Table 5-16.** *Objectives List Column*

| Column | Type |
|---|---|
| Objective | Multiple lines of text |

## Text Box

The Text Box list template creates a highly specialized yet very simple list. A list item for the text box list consists of a single text field as shown in Table 5-17.

**Table 5-17.** *Text Box List Column*

| Column | Type |
|---|---|
| Text | Multiple lines of text |

The list also contains a single view called All Items that displays every item in the list. The uniqueness of this list, though, is that only a single list item exists in the list. After adding a list item using the Add New Item link, the list no longer allows the addition of new items. Instead, the list contains an Edit Text link that allows the user to alter the text of the only list item in the list. Since the list contains only a single list item, there are far fewer options available when managing the list. The Customize List screen does not allow you to add or edit columns or views, and the Change General Settings screen does not display settings for attachments or approval of list items.

The purpose of the text box list is to allow the user to insert text onto the meeting workspace page. Since the text column is a Multiple lines of text type, the text that the user enters can be decorated with colors, alignment, bolding, font size, and other rich text aspects as shown in Figure 5-12. You can also see the text box list in use by creating a social meeting workspace. The social meeting workspace contains a directions list that is created from the Text Box list template.


**Figure 5-12.** *The text box list used to customize a meeting workspace*

## Things to Bring

The Things to Bring list template creates a list of items necessary for the meeting and who is responsible for them. This list can be beneficial in both corporate and social meeting workspaces to manage who is responsible for meeting necessities. The columns in the Things to Bring list template are shown in Table 5-18.

**Table 5-18.** *Things to Bring List Columns*

| Column | Type | Notes |
|---|---|---|
| Item | Single line of text | |
| Comment | Single line of text | |
| Owner | Single line of text | Text column type allows any text entry rather than selection of site users. |

The things to bring list contains the two views most common in meeting workspace lists, allowing users to see all of the list items or the list items they created. Like many other meeting workspace lists, the views in the Things to Bring list template allow the user to change the display order of the list items. These views are described in Table 5-19.

**Table 5-19.** *Things to Bring List Views*

| View | Description |
|---|---|
| All Items | The default view, it displays all items in the list. |
| My Items | Displays items that the current user has created. This is accomplished by using a filter of `Created By is equal to [Me]`. |

## Attendees

The Attendees list template allows members of the Administrator site group to manage people who will be involved in a meeting. The attendees list is created automatically when you create a meeting workspace. The list maintains a list of people who are invited to the meeting, along with an attendance type and response. The columns in the Attendees list template are shown in Table 5-20.

**Table 5-20.** *Attendees List Columns*

| Column | Type | Notes |
|---|---|---|
| Name | Single line of text | |
| Comment | Multiple lines of text | |
| Response | Choice | Options include None, Accepted Tentative, and Declined. The attendees list does not allow you to change these options. |
| Attendance | Choice | Options include Required, Optional, and Organizer. The attendees list does not allow you to change these options. |

■ **Note** There can only be one attendees list in a meeting workspace. If you add another attendees list, both lists will display the same information.

### Managing the Attendees List

The attendees list does not display an Add Item link on the list screen like most other lists. There also is no context menu for any columns, preventing you from editing any of the attendees. In order to add, edit, or delete attendees, you must first click the Manage Attendees link displayed on the toolbar of the list screen as shown in Figure 5-13. The list will then display a built-in view that includes an Add Attendee link on the toolbar and a context menu on the Name column. This context menu provides the View Item, Edit Item, and Delete Item options found in all other lists.

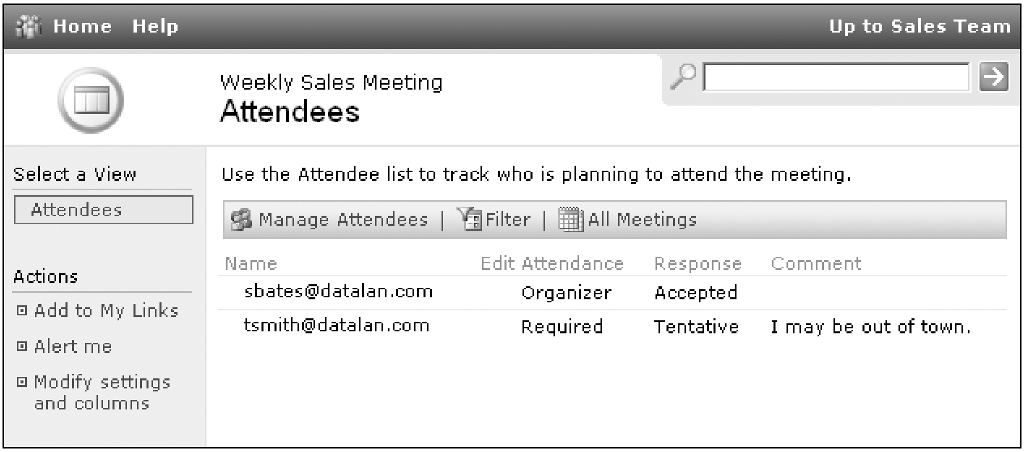


**Figure 5-13.** *The attendees list screen*

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**Caution** Adding people directly to the attendees list does not automatically give them access to the meeting workspace. Make sure you add them as users of the workspaces in order to provide them with the proper access.

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To add an attendee directly to the attendees list:

1. Navigate to the meeting workspace.
2. On the meeting workspace screen, click the Manage Attendees link on the attendees list.
3. On the attendees list screen, click the Add Attendee link on the toolbar.
4. On the New Item screen, enter the e-mail address or user name for the new attendee.
5. If you do not know the exact e-mail address or user name of the person you want to add, you can click the Address Book button. This button will open up the same address book you should be familiar with from Outlook. From the address book, you can search for the user in both corporate and personal address lists. When you have found a user you wish to grant access to for the list, select that user in the list and click the OK button.
6. Set the attendance type of required, optional, or organizer for the new attendee.
7. Click the Save and Close link on the toolbar.

**Tip** You cannot delete the attendees list from a meeting workspace. If you do not want the attendees list to display, you can hide the web part on the workspace's web part page. See Chapter 7 for further information on managing web parts and web part pages.

# Special Lists

There are two more lists provided for use in WSS sites and SPS areas that have not yet been discussed in this chapter. These two lists are highly specialized to perform very specific management of their list items that you cannot get through either custom lists or any of the other list templates. The Discussion Board and Survey list templates manage and present their list items in a manner that is specific to their own purpose.

## Discussion Boards

If you have ever used an Internet news group or web site discussion forum, then SharePoint's Discussion Board list template will be familiar to you. The purpose of a discussion board is to organize messages around similar topics. New messages can be created as well as replies to existing messages. The columns of a discussion board list include the user-editable columns shown in Table 5-21 as well as some special columns that SharePoint uses to manage how the list items are related and displayed.

**Table 5-21.** *Discussion Board List Columns*

| Column | Type |
|---|---|
| Subject | Single line of text |
| Text | Multiple lines of text |

The Created and Created By columns normally found in other lists do not exist in a discussion board list. Instead, there are Posted At and Posted By columns that perform the same functions but are more accurately named for this type of list. There is also a Reply column that can be used in a user-created view to display an icon that, when clicked, allows a user to reply to the current discussion thread.

The discussion board comes with two views that show the discussion messages in distinct ways. Each user often has their own preference for viewing discussion forums in one of the two views described in Table 5-22.

**Table 5-22.** *Discussion Board List Views*

| View | Description |
|---|---|
| Threaded | The default view, it displays list items (messages) and their replies grouped together. These groupings are called *threads* and are shown in Figure 5-14. This view contains a unique link in the toolbar labeled Expand/Collapse, which allows you to expand or collapse the thread groupings. |
| Flat | Displays all list items in the discussion board as separate list items. The subject, who it was posted by, and modified date are displayed as well as the message itself, which is collapsed and can be viewed by clicking the plus sign next to the subject. |

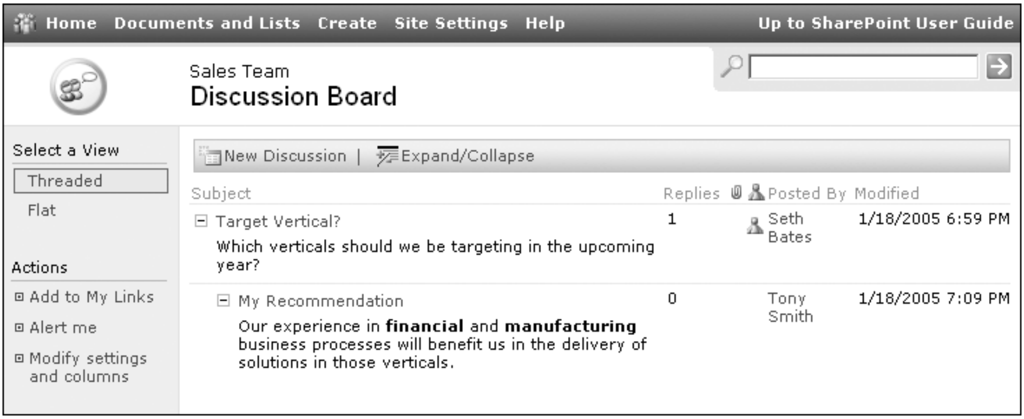


**Figure 5-14.** *The discussion board displaying the threaded view*

## Using the Discussion Board

Aside from reading the message in a discussion board, you will want to do two things: create new discussion threads and reply to existing threads. To create a new discussion thread, click the New Discussion link on the toolbar of the discussion board screen. Enter a subject and text, and then click the Save and Close link just as you would when creating new list items in other list types.

To reply to an existing thread, you can click the Reply icon if it is presented in the view currently displayed. If the Reply column is not displayed, choose Reply from the context menu of a list item in the appropriate thread. Both methods take you to a New Item screen where the subject is populated with the subject of the thread you are replying to. Enter a message and click the Save and Close link to create a new message in the thread.

**Tip** When replying to a thread, you can change the subject line even though it is filled in for you. SharePoint will still know which thread the message belongs to.

## Surveys

The Survey list template allows you to create lists that are presented to users as a questionnaire. Although the underlying technology is the same as with other lists, the survey list is highly customized to make managing, responding, and reporting results match what you would expect when working with a survey. Surveys are an easy way to gain feedback from users. A survey added to a human resources site could poll employees about medical benefits satisfaction or preferences for a holiday party location.

To create a new survey, perform the following steps:

1. Click the Create link on the top menu of the site.
2. On the Create screen, click the Survey link under the Surveys section.
3. On the New Survey screen, enter a name and description for the survey.
4. Under the Survey Options section, specify whether users' names should be displayed with their responses and if a user should be able to respond to the survey more than once.
5. On the Add Question screen, enter the text for the question and choose an answer type. The answer types are almost identical to column types when adding columns to a list in Chapter 4.
6. Specify the optional settings for the current question. The settings available are determined based on the answer type you selected.
7. If you want to add another question, click the Next Question button and repeat steps 5 and 6.
8. If you do not wish to add any more questions to the survey, click the Finish button.

Instead of managing the columns, in a survey you manage the questions. Managing questions is extremely similar to managing columns in a custom list. Clicking the Modify Survey and Questions link on the survey screen will take you to the Customize Survey screen, allowing you to manage the survey. Here, under the Questions section, you can add, edit, and rearrange survey questions in the same manner that you manage columns in other lists.

Surveys come with standard views as shown in Table 5-23. You do not have the ability to edit these views or add new views.

**Table 5-23.** *Survey Views*

| View | Description |
|---|---|
| Overview | The default view, it displays the name, description, time created, and the number of responses for the survey. |
| Graphical Summary | For each question, this displays the percentage of respondents giving each answer. |
| All Responses | This view is similar to the All Items view found in other lists. It shows a list item for each user who has responded to the survey. It contains the familiar context menu, allowing you to view, edit, or delete a list item. |

■ **Tip** If you want users in the Reader site group to respond to a survey, you must configure the security on the survey. The default settings do not allow these users to add items, thus prohibiting them from responding to the survey.

## Rating Scale

Instead of having column types like the other lists we have discussed, survey questions have answer types, which are managed in the same way as column types in other lists. Along with the types provided for columns, answer types include a new type called Rating Scale. The Rating Scale, shown in Figure 5-15, is displayed as a grid in which the user selects a value from a range for each row. Optional settings for the Rating Scale type are shown in Table 5-24.

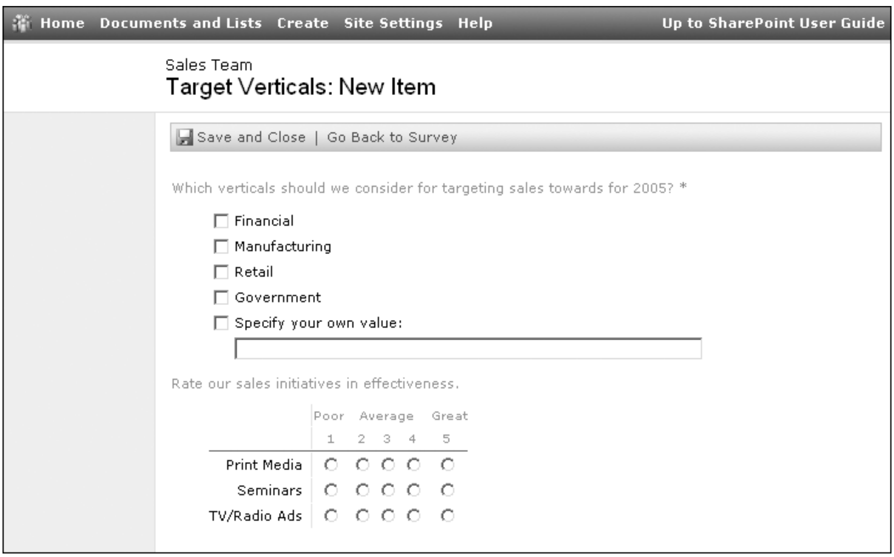


**Figure 5-15.** *Responding to a survey*

**Table 5-24.** *Optional Settings for Rating Scale Answer Types*

| Setting | Description |
|---|---|
| Required | Specifies whether users must answer this question in order to submit their responses for the survey. |
| Choices | Indicates the labels for the grid rows. These choices determine the number of rows displayed. |
| Number Range | Determines the number of columns in the grid, or the number of options the user can select from to answer each row. |
| Range Text | Specifies the column heading. There are three range text entries: one for the left side, one for the right side, and one for the middle of the grid. |
| N/A Option | Specifies whether an option of N/A is available as an answer. |
| N/A Option Text | Specifies the heading for the N/A option column. |

### Responding to a Survey

For the survey to be useful, you will need to respond to the questions that were created and likely have others respond as well. Responding to a survey is similar to the experience of creating a new list item in other lists.

To respond to a survey:

1. Navigate to the survey list screen.
2. On the survey list screen, click the Respond to This Survey link in the toolbar. If you have already responded and the survey does not allow multiple responses per user, you will be presented with an error message.
3. On the New Item screen, shown in Figure 5-15, enter answers for each question with an asterisk, as these are required to save your response.
4. Enter answers for any nonrequired questions you want.
5. Click the Save and Close link on the toolbar.

After responding to the survey, you are taken to the Survey Overview view where you can see how many responses there are so far. You can now use the views created by the list to see a breakdown of the responses to each question or to see who has responded to the survey.

## Advanced Office 2003 Integration

Throughout this chapter we have discussed various ways in which template SharePoint lists integrate with Office 2003 products. In addition to importing contacts, exporting events, and linking contacts or events lists with Outlook, lists created from SharePoint list templates provide some additional integration with Office 2003 that we explored in our discussion of custom lists in Chapter 4.

# Exporting SharePoint Lists to Excel

The exporting of list information from custom lists into Excel discussed earlier in Chapter 4 also applies to template SharePoint lists. This provides you with an easier interface with which to modify large amounts of data in the list. Once in Excel, you can make numerous changes to the information and then commit all of the changes to the SharePoint list at the same time. This allows you to make updates while ensuring that SharePoint users are viewing a complete list of updated information rather than a partially completed list that would be shown if you were editing items individually within SharePoint.

To export a list to Excel, follow these steps:

1. Navigate to a SharePoint list you want to export.
2. Click the Export to Spreadsheet link on the Actions list on the left menu.
3. If you are prompted about opening or saving the Microsoft Office Excel Web Query File, click the Open button.
4. On the Opening Query dialog box in Excel, click the Open button to confirm that you want to run the query to export the information into the Excel spreadsheet.
5. If you already have Excel 2003 open, the Import Data dialog box will appear. Choose where to put the list. Options include a region on the current worksheet, a new worksheet, or a new workbook. If you did not have Excel 2003 running, the data will be put into a new workbook.

---

■ **Note** When exporting list information to Excel, all list items displayed by the current view are exported. Items removed from the view by its filter setting are not included, but setting the temporary filter on the list screen has no effect on the data exported.

---

## The Excel List

After performing the preceding steps to export a list to Excel, the data that appears in the Excel spreadsheet is formatted as an Excel List. The cells of an Excel List are denoted by the colored box surrounding the cells, the column headings that act as filters using drop-down menus, and the additional List actions available in the Excel menu under the Data option. The context menu, available by right-clicking the list in the spreadsheet, and the List toolbar also provide these actions.

The Excel List is what gives you the ability to make changes to the data within Excel and apply those changes to the SharePoint list. The Excel List can also receive changes that SharePoint users have made to the SharePoint list. The Excel List provides the following actions for you to manage the connection between the SharePoint list and Excel List:

- *View List on Server*: Opens the SharePoint list in your browser
- *Unlink List*: Severs the connection between the Excel List and the SharePoint list

- *Synchronize List*: Sends information updates to and from the SharePoint list and provides the ability to resolve data conflicts
- *Discard Changes and Refresh*: Cancels data updates made within Excel and retrieves the list information from SharePoint

## Advanced Datasheet Features

In Chapter 4, we described the use of the Datasheet view for editing custom list data. The Datasheet view is also available for use with the standard and meeting workspace lists discussed in this chapter. The Datasheet view contains numerous features that allow for integration with Office 2003 products. Clicking the Task Pane link in the Datasheet's toolbar will display a list of Office integration features that are described in Table 5-25.

**Table 5-25.** *Datasheet Task Pane Office Links*

| Feature | Description |
|---|---|
| Export and Link to Excel | Exports the list information in the same manner as the Export to Spreadsheet link on the Actions menu. The lists are linked, allowing you to synchronize data between Excel and SharePoint. |
| Print with Excel | Exports the list information to Excel and displays the Print dialog box, allowing you to quickly print out the list items. |
| Chart with Excel | Exports the list information to Excel and displays the Chart Wizard dialog box, allowing you to create graphs and charts based on the list items. |
| Create Excel PivotTable Report | Exports the list information to Excel and displays the PivotTable Field List dialog box and toolbar. The PivotTable allows you to select from the columns in the SharePoint list and create PivotTable reports with the capability to alter rows and columns interactively to display data detail in different ways. |
| Export to Access | Exports the list information into a new Access table in either a new or existing Access database. When doing this, the list and Access database are not linked and cannot be synchronized between the two. |
| Create Linked Table in Access | Creates a new Access-linked table in either a new or existing Access database. The linked table is synchronized with the SharePoint list. Any changes made in Access are also visible in the SharePoint list and vice versa. |
| Report with Access | Creates a new Access-linked table in either a new or existing Access database and then generates an Access report based on the information in the linked table as shown in Figure 5-16. This can be a valuable method for printing list information. |

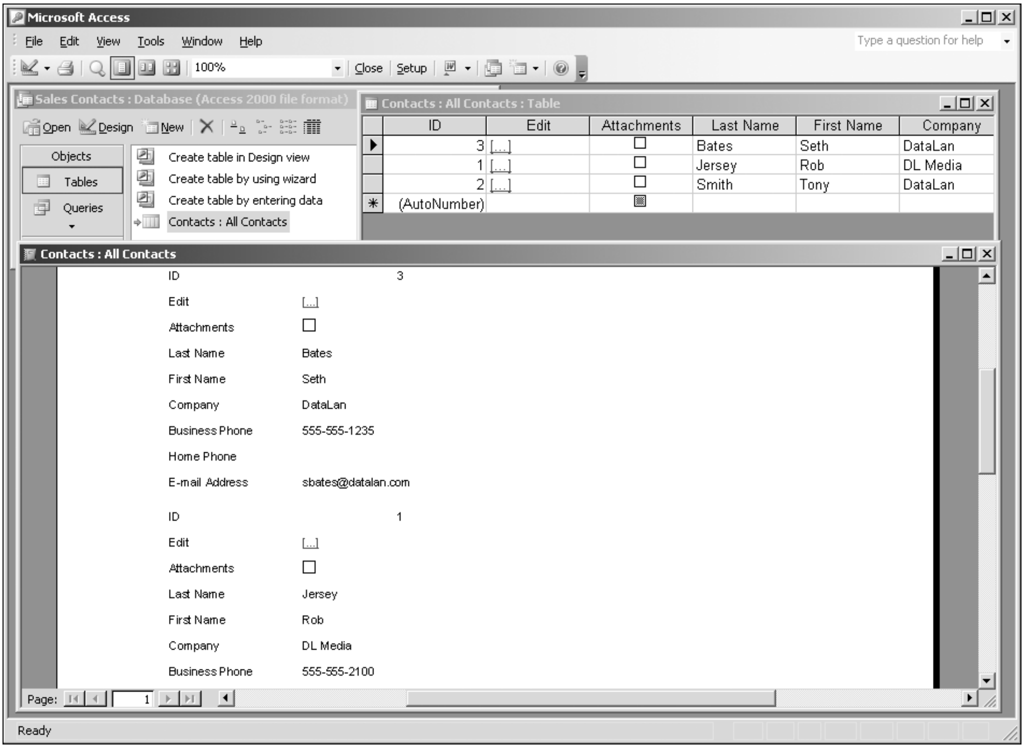


**Figure 5-16.** *Using the Report with Access feature to create a contacts list report*