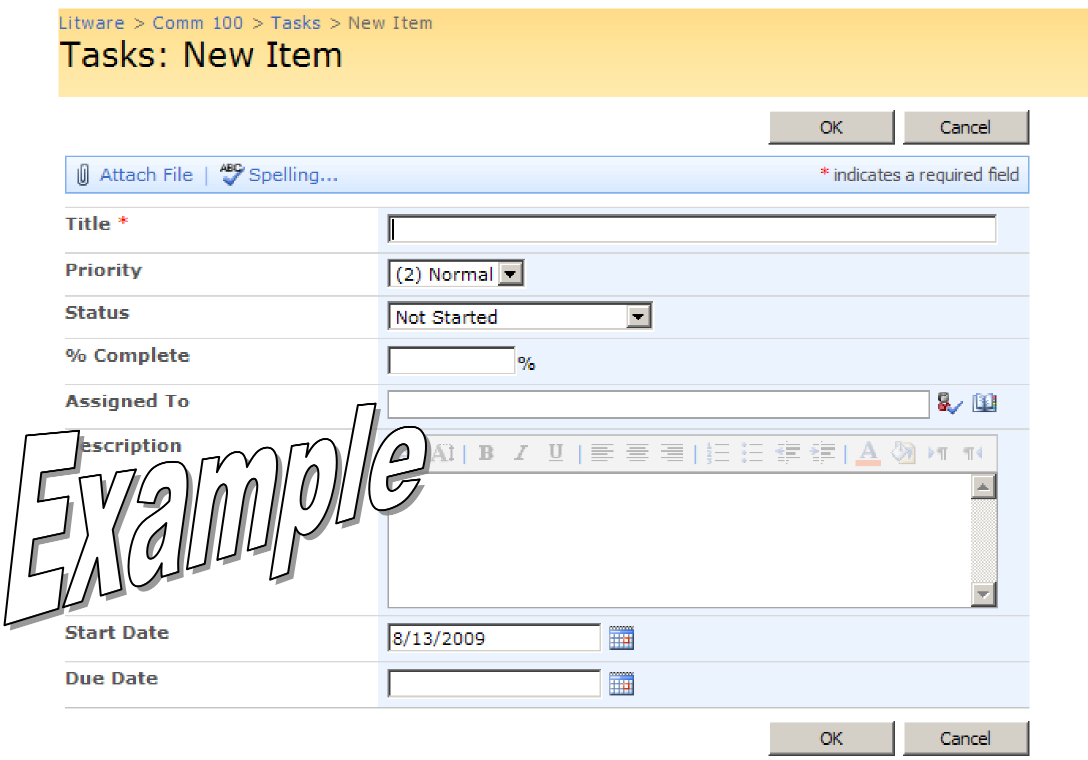
Chapter #2: Lists

Exercise 1: Creating a New Task

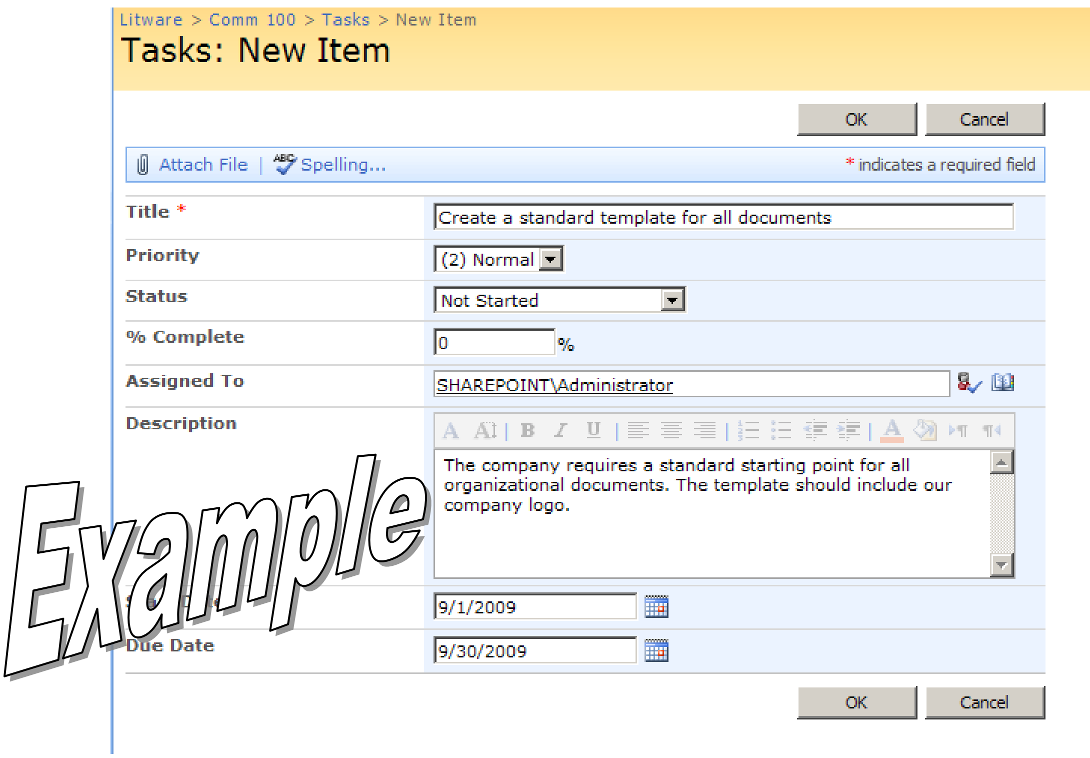
1. Create a new template
    - Open Word
    - File New (On the left choose Expense Report)
    - Chose Travel Expense Report
    - Save it as : TravelExpensesTempleate
2. Open the SharePoint Team site you created.
3. From the main page of your new SharePoint team site, click the Tasks link in the Quick Launch navigation bar.
4. To create a new task in this Tasks list, click the New button on the list toolbar. A page opens that is very similar to a form shown below.



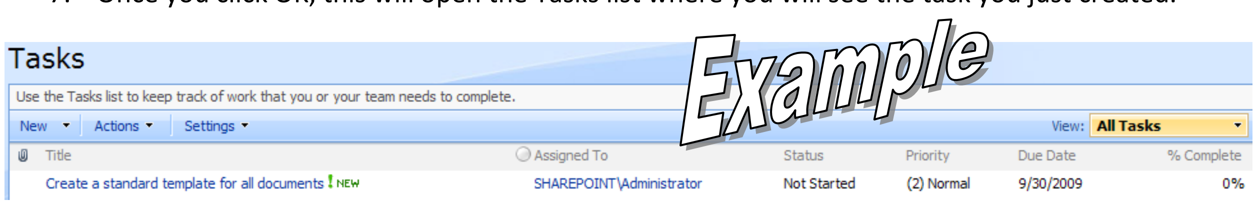
5. Add the following information to the form and click OK:
    - Title: Create a standard template for all travel documents.
    - Priority: (2) Normal
    - Status: Not Started
    - % Complete: 0
    - Assigned To: Administrator

- Description: The company requires a standard starting point for all organizational documents. The template should include our company logo.
- Start Date: 09/01/2010
- Due Date: 09/30/2010

6. After you've completed these fields, the form should now look as follows:

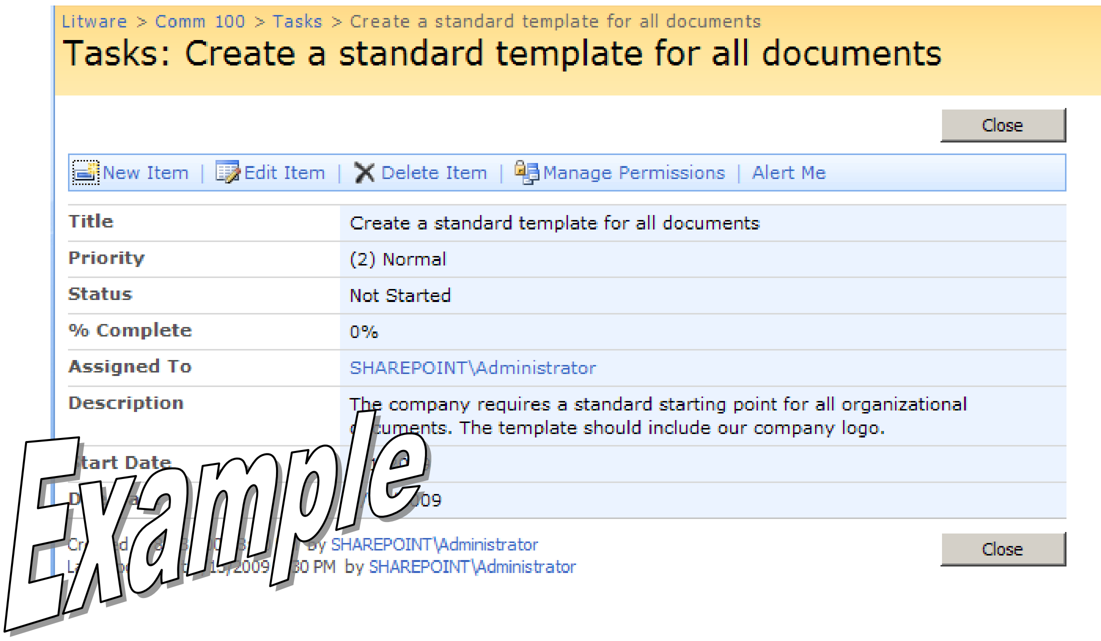


7. Once you click OK, this will open the Tasks list where you will see the task you just created.

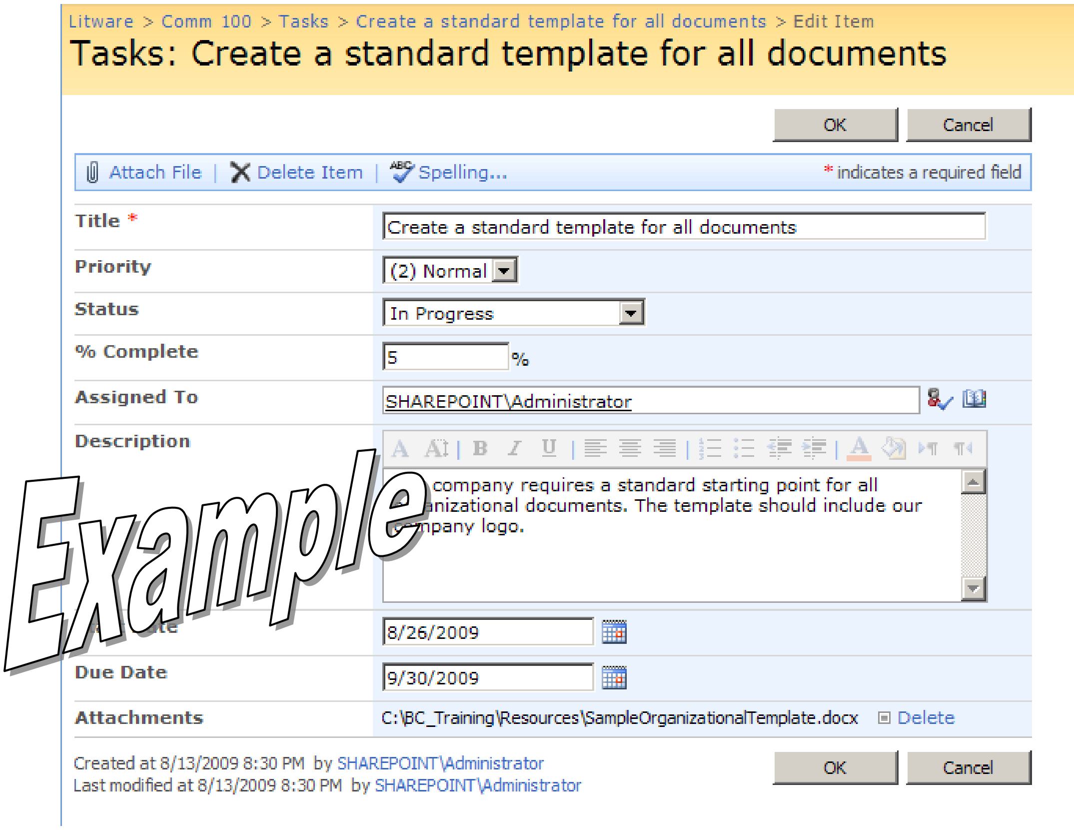


Exercise 2: Editing an Existing Item in a List

1. From the main page of your SharePoint team site, click the Tasks link in the Quick Launch navigation bar.
2. Click the title of the task you added for creating a standard document template from Exercise 1 in this lab.
3. You now see all of the information about your task. Click the Edit Item button on the list toolbar as shown below.



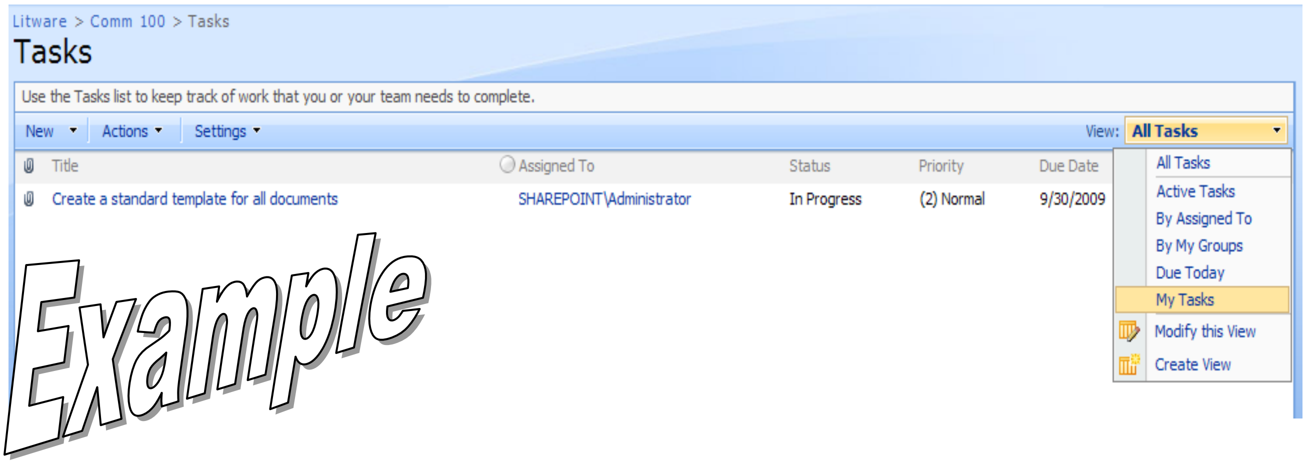
4. From the toolbar, click the Attach File button.
5. Click the Browse button. Browse to the template document you created above (TravelExpenseTemplate). Click the Open button.
6. Click OK. The document is added to the list item as an attachment. The file uploads to the SharePoint list and becomes accessible to others who review the task. The figure below shows that the document has been attached to the list item.
7. Because you have already started working on the task, you should also change the status field to In Progress and % Complete field to 5. You may also want to change the Start Date to the current date. The task form should now look like this.



8. Click OK to save your changes.

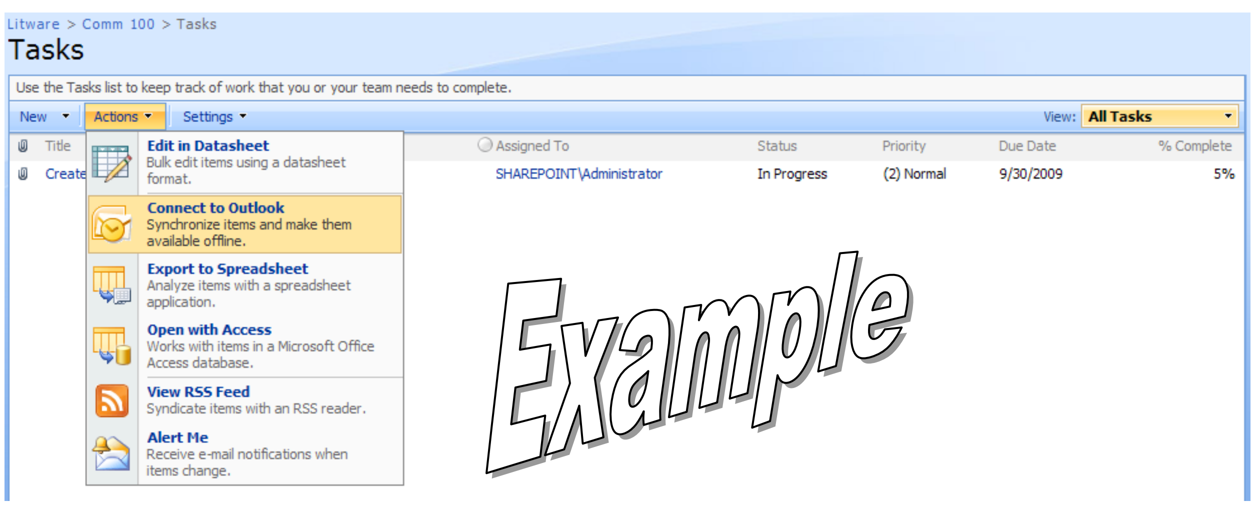
Exercise 3: Changing the View of a List

1. From the main page of your SharePoint team site, click the Tasks link in the Quick Launch navigation bar.
2. When you first visit a list, the default view of the list displays. In many cases, this is the All Items view, but if you have customized your list, it may be something different.
3. All views are listed in a drop-down box to the right of the list toolbar. Expand the menu and select the My Tasks view from the list as shown below. Once you select this view, the My Tasks view appears and you should see only your own tasks displayed in the view. This is because the view is filtered to only display items that are assigned to the current user.

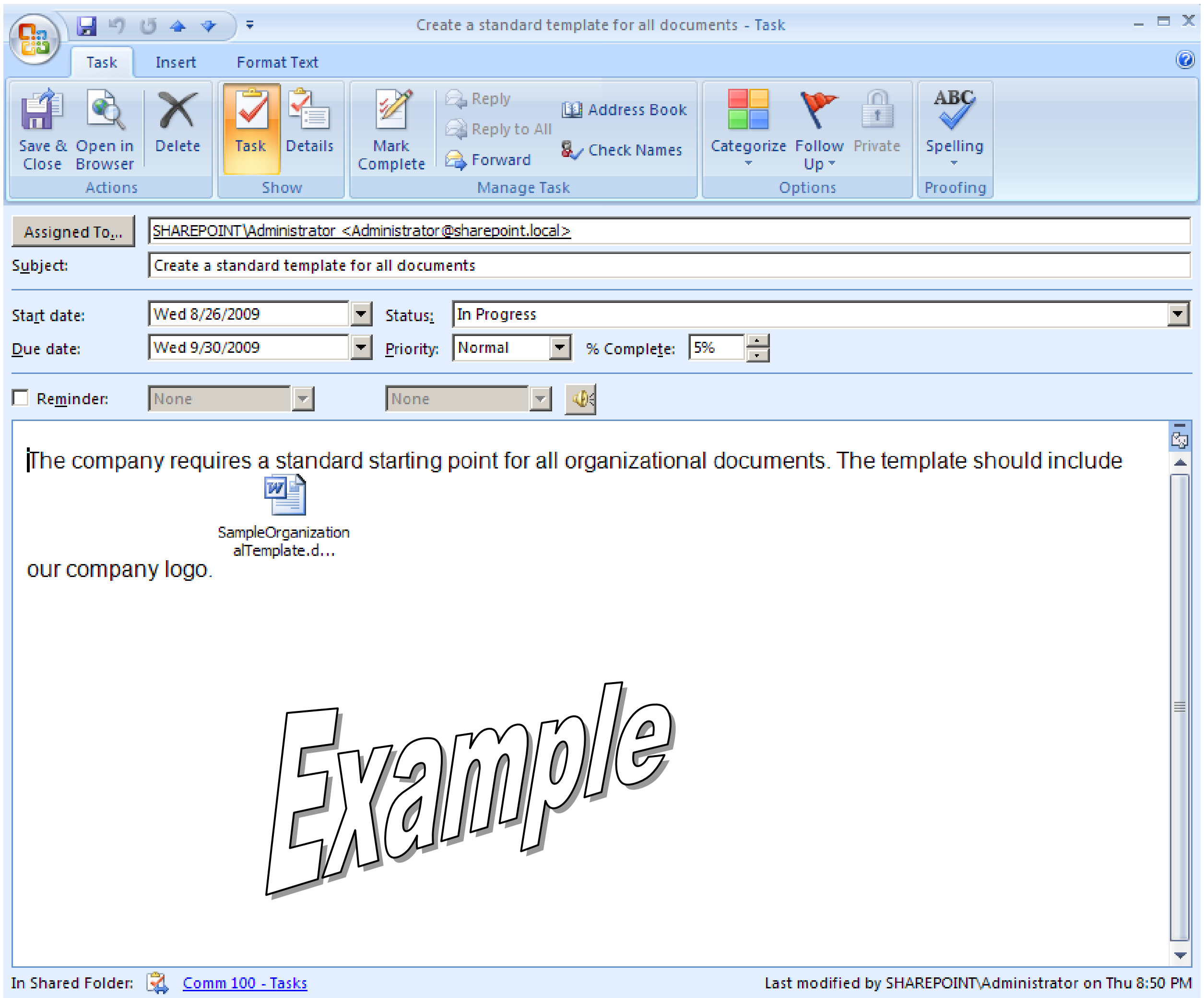


Exercise 4: Working Offline with List Content

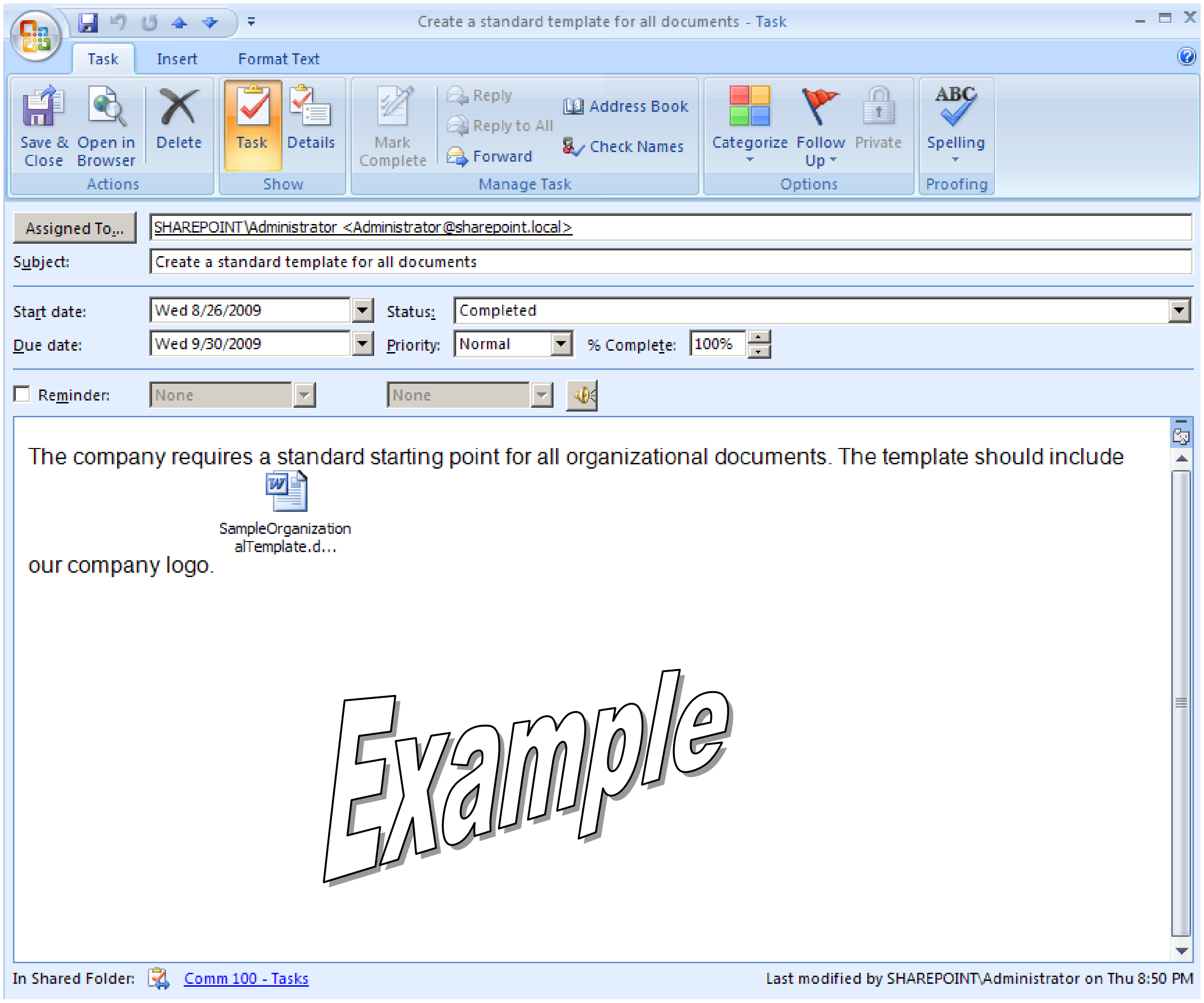
1. From the main page of your SharePoint team site, click the Tasks link in the Quick Launch navigation bar.
2. From the list toolbar, click the small arrow to the right of the Actions menu item. This expands the menu to display all the available actions for working with this list.
3. Select Connect to Outlook, which is shown below.



4. Outlook opens, and a small message appears asking you to confirm that you want to connect to the SharePoint list. Click the Yes button to confirm the action. You should now see a listing of any lists that were available within your SharePoint site within an Outlook folder.
5. Select your task for creating a standard document template. A window appears as shown below.

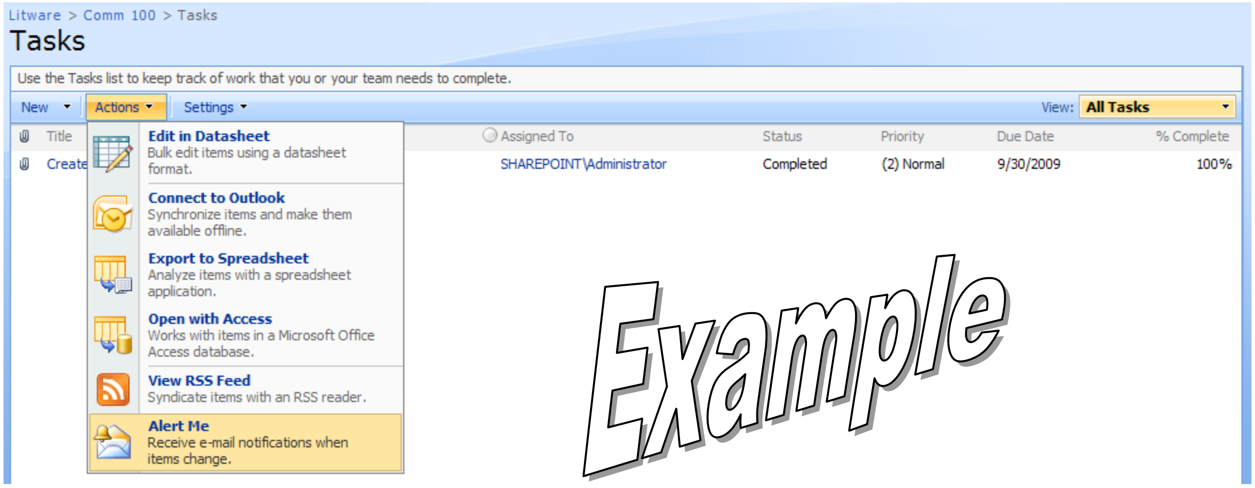


6. Update your task to mark it as complete using the values shown below, and click the Save and Close button. When you return to your SharePoint site, you should see that the task is marked as complete.

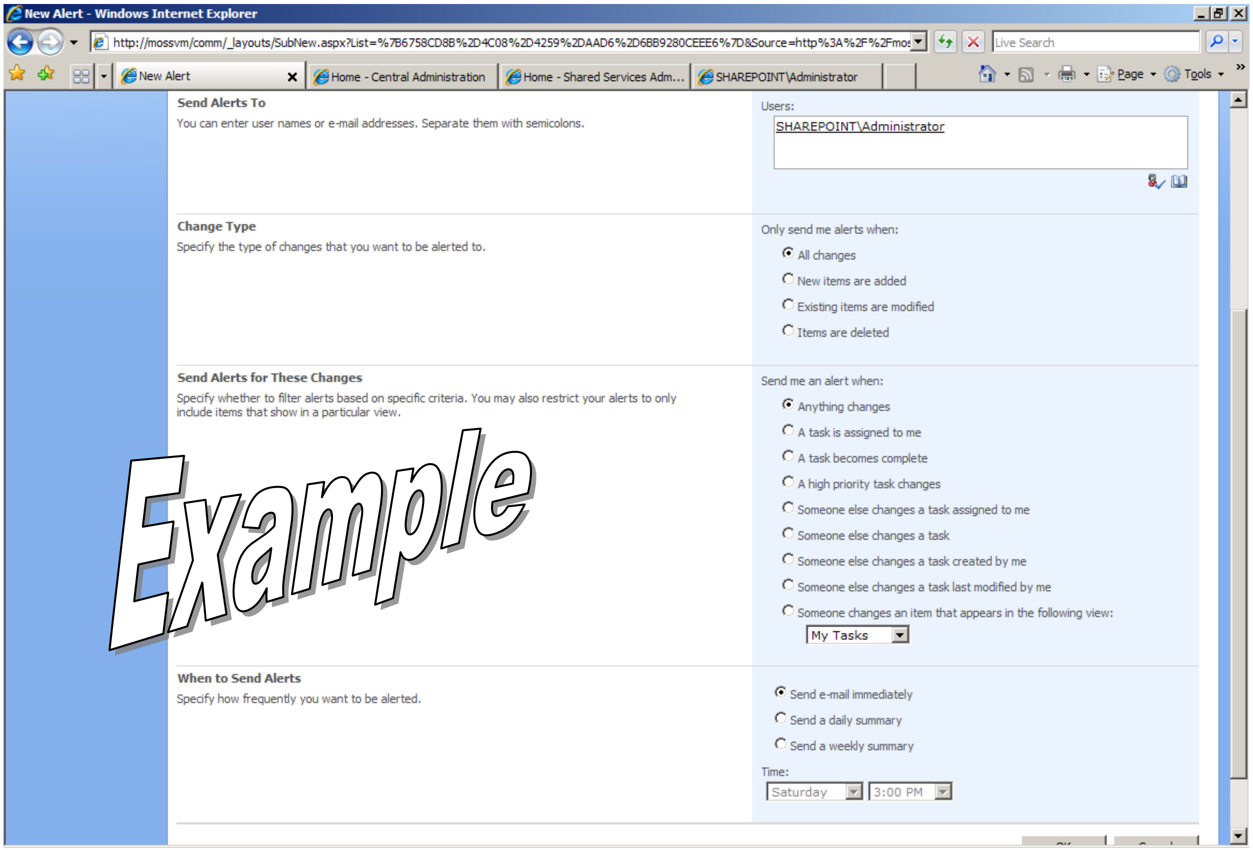


Exercise 5: Subscribing to an Alert for a List

1. From the main page of your SharePoint team site, click the Tasks link in the Quick Launch navigation bar.
2. From the list toolbar, click the small arrow to the right of the Actions menu item. This expands the menu to display all the available actions for working with this list.
3. Select Alert Me from the menu, which is shown below.

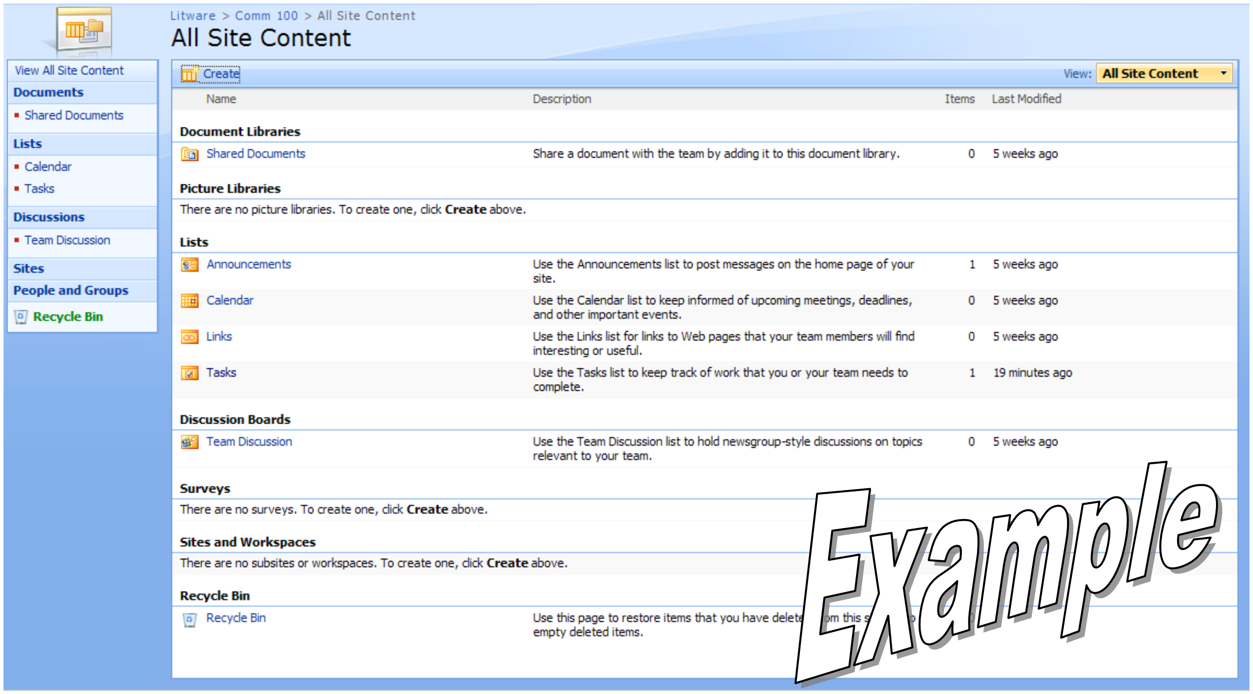


4. Once you select Alert Me, you are then redirected to a page where you can specify details on how you want to receive alerts.
5. Depending on the type of list on which you create an alert, you see different customization options, which are shown below. If you are working on the tasks, for example, you can specify:
    - The users who have been subscribed to this alert.
    - Whether an alert is sent for any changes or for only specific types of change, such as the creation of new items or the deletion or change of existing items.
    - The type of changes that should trigger an alert, such as an item being marked as complete or the priority level of a task changing.
    - How often alerts are sent. In some cases, it may be beneficial to receive immediate notification; however, in other cases a daily or weekly summary report is sufficient.



Exercise 6: Subscribing to an RSS Feed for a List

1. From the maing page of your SharePoint team site, click the View All Site Content link in the Quick Launch navigation bar. You are redirected to a listing of all lists and libraries for the current site as shown below.



2. Click the name of the list for which you want to view an RSS feed, for example the Tasks list.
3. From the list toolbar, click the small arrow to the right of the Actions menu item. This expands the menu to display all the available actions for working with this list.
4. Select View RSS Feed.
5. Select the Subscribe to this RSS feed link to consume the feed in your aggregator, as shown below.

6. If you are using Outlook 2007, you can consume the feed and view all updates to your lists directly from your email client. Click the Yest button to add the feed to your Outlook folders or click the Advanced button to configure specific details for the feed, such as the target folder or whether to download attachments.

Exercise 7: Exporting Information to Excel

1. From the main page of your SharePoint team site, click the View All Site Content link in the Quick Launch navigation bar.
2. Click the name of the list from which you want to export information to Excel, for example the Tasks list.
3. From the list toolbar, click the small arrow to the right of the Actions menu item. This expands the menu to display all the available actions for working with this list.
4. Click the Export to Spreadsheet menu item. A window appear asking whether you wish to open or save the file.
5. Select the Open button. You may receive a warning about connecting to the selected data connection. This is a security precaution and is expected.
6. If you receive this warning, click the Enable button. Your list view now displays within an Excel workbook, as shown below. From there you can perform additional calculations, apply styles, print, or email the information to colleagues.