

Chapter #2: Lists



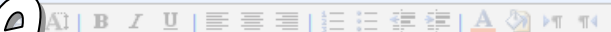


Exercise 1: Creating a New Task

1. Create a new template
 - Open Word
 - File New (On the left choose Expense Report)
 - Chose Travel Expense Report
 - Save it as : TravelExpensesTemplate
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.

Litware > Comm 100 > Tasks > New Item

Tasks: New Item

| * Indicates a required field

Title *	<input type="text"/>
Priority	(2) Normal ▾
Status	Not Started ▾
% Complete	<input type="text"/> %
Assigned To	<input type="text"/>  
Description	<div> <div></div></div>
Start Date	8/13/2009 
Due Date	<input type="text"/> 

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:

Litware > Comm 100 > Tasks > New Item

Tasks: New Item

OK Cancel

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

Title * Create a standard template for all documents

Priority (2) Normal

Status Not Started

% Complete 0 %

Assigned To SHAREPOINT\Administrator

Description

The company requires a standard starting point for all organizational documents. The template should include our company logo.

9/1/2009

Due Date 9/30/2009

OK Cancel

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

Tasks

Use the Tasks list to keep track of work that you or your team needs to complete.

New Actions Settings View: All Tasks





Title	Assigned To	Status	Priority	Due Date	% Complete
Create a standard template for all documents ! NEW	SHAREPOINT\Administrator	Not Started	(2) Normal	9/30/2009	0%

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.

Tasks: Create a standard template for all documents

Close

 New Item |
  Edit Item |
  Delete Item |
  Manage Permissions |
 Alert Me

Title	Create a standard template for all documents
Priority	(2) Normal
Status	Not Started
% Complete	0%
Assigned To	SHAREPOINT\Administrator
Description	The company requires a standard starting point for all organizational documents. The template should include our company logo.
Start Date	11/15/2009
Created	11/15/2009 10:00 AM by SHAREPOINT\Administrator
Modified	11/15/2009 10:00 AM by SHAREPOINT\Administrator

Close

Example

- From the toolbar, click the Attach File button.
- Click the Browse button. Browse to the template document you created above (TravelExpenseTemplate). Click the Open button.
- 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.
- 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.

Litware > Comm 100 > Tasks > Create a standard template for all documents > Edit Item

Tasks: Create a standard template for all documents

OK Cancel

Attach File |
 Delete Item |
 Spelling...
 * indicates a required field

Title *	Create a standard template for all documents
Priority	(2) Normal
Status	In Progress
% Complete	5 %
Assigned To	SHAREPOINT\Administrator
Description	<div> <p>company requires a standard starting point for all organizational documents. The template should include our company logo.</p> </div>
Start Date	8/26/2009
Due Date	9/30/2009
Attachments	C:\BC_Training\Resources\SampleOrganizationalTemplate.docx Delete

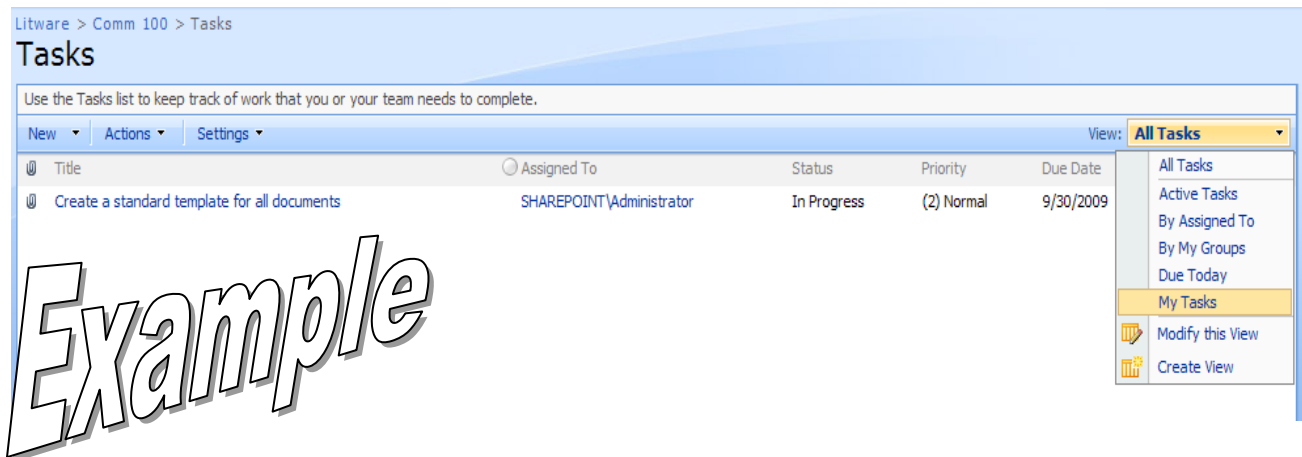
Created at 8/13/2009 8:30 PM by SHAREPOINT\Administrator
 Last modified at 8/13/2009 8:30 PM by SHAREPOINT\Administrator

OK Cancel

8. Click OK to save your changes.

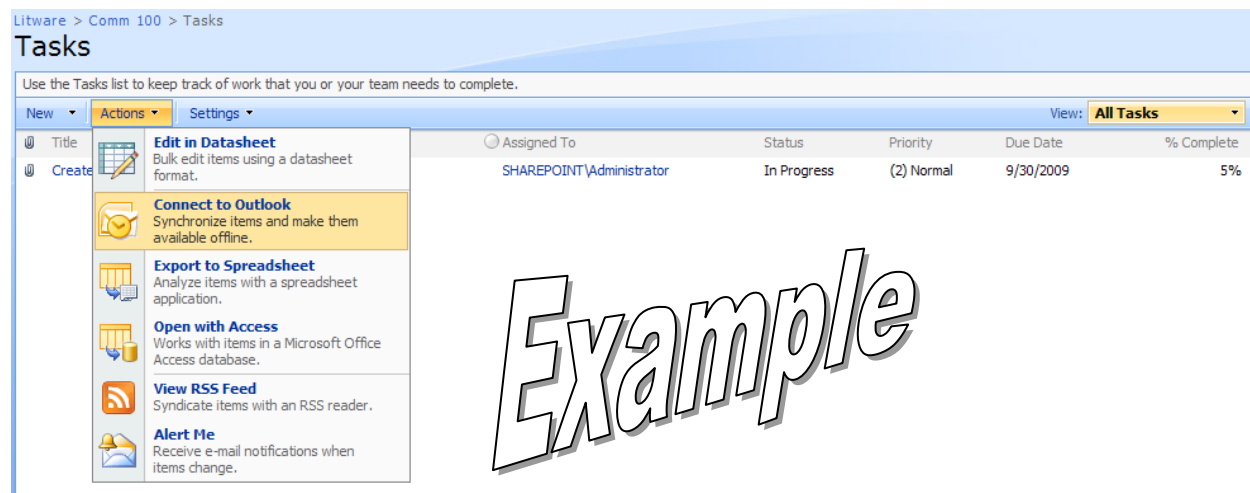
Exercise 3: Changing the View of a List

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.

Create a standard template for all documents - Task

Task Insert Format Text

Save & Open in Close Delete Task Details Mark Complete Reply Reply to All Address Book Forward Check Names Categorize Follow Up Private Spelling

Assigned To: SHAREPOINT\Administrator <Administrator@sharepoint.local>

Subject: Create a standard template for all documents

Start date: Wed 8/26/2009 Status: In Progress

Due date: Wed 9/30/2009 Priority: Normal % Complete: 5%

☐ Reminder: None None

The company requires a standard starting point for all organizational documents. The template should include

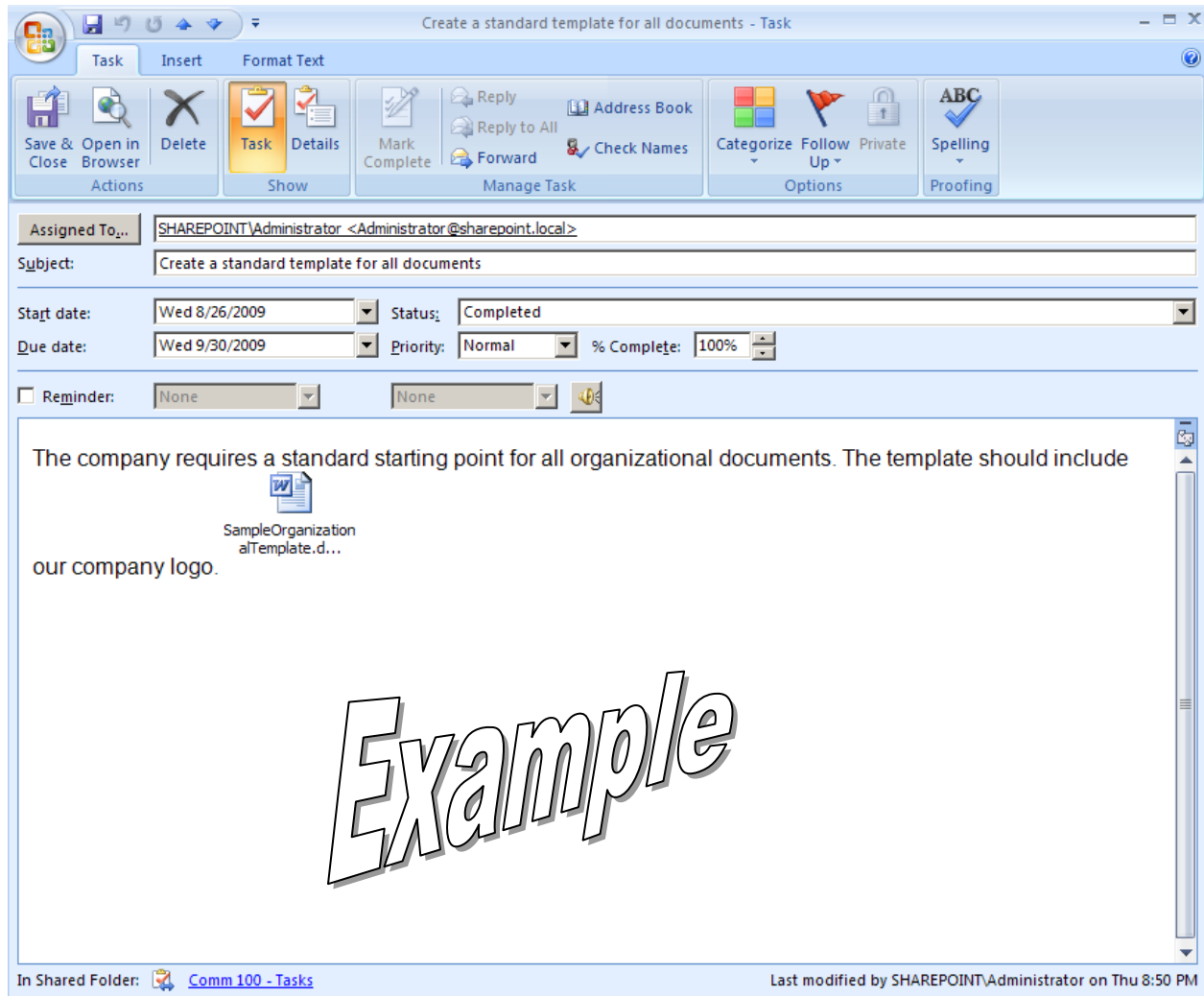
our company logo.

SampleOrganization
alTemplate.d...

Example

In Shared Folder: Comm 100 - Tasks Last modified by SHAREPOINT\Administrator on Thu 8:50 PM

- 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.

Litware > Comm 100 > Tasks

Tasks

Use the Tasks list to keep track of work that you or your team needs to complete.

New ▾ Actions ▾ Settings ▾ View: **All Tasks** ▾

Title	Assigned To	Status	Priority	Due Date	% Complete
Create	SHAREPOINT\Administrator	Completed	(2) Normal	9/30/2009	100%

Edit in Datasheet
Bulk edit items using a datasheet format.

Connect to Outlook
Synchronize items and make them available offline.

Export to Spreadsheet
Analyze items with a spreadsheet application.

Open with Access
Works with items in a Microsoft Office Access database.

View RSS Feed
Syndicate items with an RSS reader.

Alert Me
Receive e-mail notifications when items change.

Example

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.

New Alert - Windows Internet Explorer

http://mossvm/comm/_layouts/SubNew.aspx?List=%7B6758CD8B%2D4C08%2D4259%2DAAD6%2D6BB9280CEE6%7D&Source=http%3A%2F%2Fmo... Live Search

Send Alerts To
You can enter user names or e-mail addresses. Separate them with semicolons.

Users:
SHAREPOINT\Administrator

Change Type
Specify the type of changes that you want to be alerted to.

Only send me alerts when:
☒ All changes
☐ New items are added
☐ Existing items are modified
☐ Items are deleted

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:
☒ Anything changes
☐ A task is assigned to me
☐ A task becomes complete
☐ A high priority task changes
☐ Someone else changes a task assigned to me
☐ Someone else changes a task
☐ Someone else changes a task created by me
☐ Someone else changes a task last modified by me
☐ Someone changes an item that appears in the following view:
 My Tasks

When to Send Alerts
Specify how frequently you want to be alerted.

☒ Send e-mail immediately
☐ Send a daily summary
☐ Send a weekly summary

Time:
Saturday 3:00 PM

Example

Exercise 6: Subscribing to an RSS Feed for a List

1. From the main 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.

View All Site Content

Documents

- Shared Documents

Lists

- Calendar
- Tasks

Discussions

- Team Discussion

Sites

People and Groups

Recycle Bin

View: All Site Content

Name	Description	Items	Last Modified
Document Libraries			
Shared Documents	Share a document with the team by adding it to this document library.	0	5 weeks ago
Picture Libraries			
There are no picture libraries. To create one, click Create above.			
Lists			
Announcements	Use the Announcements list to post messages on the home page of your site.	1	5 weeks ago
Calendar	Use the Calendar list to keep informed of upcoming meetings, deadlines, and other important events.	0	5 weeks ago
Links	Use the Links list for links to Web pages that your team members will find interesting or useful.	0	5 weeks ago
Tasks	Use the Tasks list to keep track of work that you or your team needs to complete.	1	19 minutes ago
Discussion Boards			
Team Discussion	Use the Team Discussion list to hold newsgroup-style discussions on topics relevant to your team.	0	5 weeks ago
Surveys			
There are no surveys. To create one, click Create above.			
Sites and Workspaces			
There are no subsites or workspaces. To create one, click Create above.			
Recycle Bin			
Recycle Bin	Use this page to restore items that you have deleted from this site. Empty deleted items.		

Example

- Click the name of the list for which you want to view an RSS feed, for example the Tasks list.
- 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.
- Select View RSS Feed.
- Select the Subscribe to this RSS feed link to consume the feed in your aggregator, as shown below.

Comm 100: Tasks - Windows Internet Explorer

http://mossvm/comm/_layouts/listfeed.aspx?List=%7B6758CD8B%2D4C08%2D4259%2DAAD6%2D6BB9280CEE6%7D

Comm 100: Tasks

You are viewing a feed that contains frequently updated content. When you subscribe to a feed, it is added to the Common Feed List. Updated information from the feed is automatically downloaded to your computer and can be viewed in Internet Explorer and other programs. [Learn more about feeds.](#)

[Subscribe to this feed](#)

Displaying 1 / 1

☐ All 1

Sort by:

- ☒ Date
- ☐ Title
- ☐ Author

Create a standard template for all documents

Thursday, August 13, 2009, 8:30:40 PM | SHAREPOINT\Administrator

Priority: (2) Normal

Status: Completed

% Complete: 100 %

Assigned To: SHAREPOINT\Administrator

Description: The company requires a standard starting point for all organizational documents. The template should include our company logo.

Start Date: 8/26/2009

Due Date: 9/30/2009

Attachments: <http://mossvm/comm/Lists/Tasks/Attachments/1/SampleOrganizationalTemplate.doc>

Example

- 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 Yes 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.

[illegible]