**UNDERSTANDING**

**LIST ELEMENTS**

Lists have items, columns, and views. Items and columns

correspond to the rows and columns that you see on a grid

layout in a spreadsheet. Views present list data in a friendlier

format that acts very similarly to a report.

Lists …

Items: An item is a row in a list. For example, for a list that stores information on customers, each

customer may have a unique item in the list, which is also called the customer row or customer record.

Columns: A column is a field in a list. You may also see columns referred to as metadata, which is a

descriptive piece of information related to the item. In the case of a customer item in a list, the

phone number, physical address, mailing address, and e-mail address would be columns that describe the customer.

Views: A single list can have multiple views. You create a view to address a user’s informational needs relating to list data. A view displays a subset of information from the list — for example, customers who have been added during a specific time period. You may also create a view to show all information on a list but have items displayed in a predefined order.

DISCOVERING SHAREPOINT LIST

COLUMN TYPES

Single line of text: Possibly the most commonly used column type, it can store a variety of

formats, such as names, phone numbers, e-mail addresses, the item’s title, and virtually anything else that you can enter into a single-line textbox.

Multiple lines of text: Occasionally, this type of column is useful because it can store larger amounts of information, such as a customer’s background information or billing address. For

this column type, you can select whether the information should contain plain, rich, or enhanced text elements, such as bold, italic, pictures, or tables. You can expand this column

as you add text to it or you can select how many lines in the box to display initially. When you use

this field to collect information from users, it is a good idea to determine the number of lines to display so that users will know how much content is expected from them.

Choice: When gathering information on an item, you can offer users a selection of values or answers from which to choose.

List Columns …

Number: You commonly need to associate numerical information with an item so that you can later perform

calculations on the information stored in it. You can configure Number columns to store numbers that fall within a specific range or percentage value.

Currency: This is similar to the Number column but specifically displays financial or monetary values.

Date and Time: You typically have a list containing dates or times. This might include when an

organization first became a customer or the last time it purchased a product.

Lookup: As your SharePoint environment expands, you may have many lists containing important

information about things such as projects, products, and employees. . In some cases, you need to take

information from one list and associate it with information from another.

Yes/No: This checkbox column indicates whether an item matches a specific criterion. In the case of the customers list, you may create a Yes/No column named Active.

List Columns…

Person or Group: Users can select people or groups from the site’s membership source (for example, Active Directory) and associate them with items in a list.

Hyperlink or Picture: You can use this column type to allow users to enter a web address into a list item to create a hyperlink or display an image located at the source location.

Calculated: Rather than have users enter information manually, you may want to calculate values based on other columns within the list.

Task Outcome: You can use this column type when defining workflow solutions.

External Data: In some cases, you may want to associate business data from an external business

application with your list items. For example, you may have a listing of all products in a sales

database and instead of re-creating it in SharePoint, you can connect to it and reuse that information.

List Columns…

Managed Metadata: In some cases within your organization, another

administrative user may have already defined a set of metadata to describe

important aspects of your organization. Therefore, there is no requirement

for you to redefine this information yourself.

Audiences: If a list has audience targeting enabled, this column type is added

to it automatically. Audiences are groups of users that you define based on a

set of criteria. When you use audiences on list items, the items appear only to

members of the audiences associated with the item.

UNDERSTANDING

LIBRARIES AND

DOCUMENTS

You can think of a document library as a Windows file folder,

but better. Like folders, libraries act as document storage, but

they also store the document’s metadata or version history

(more about these a little later), which folders do not.

The core components of a SharePoint

document library include:

Metadata information: Document libraries have metadata columns for attaching

information to the document, such as document owner or status.

Document protection: Documents in libraries are protected by a check-in and check-out

feature, which ensures that only one user at a time can edit a document

Document history: Libraries keep a document audit trail, known as version history..

Major and minor versions: Although both lists and libraries support versioning of

information, document libraries support minor and major versions. Major versions are

published files that are accessible to all site users, whereas the minor versions are files in a

draft state that typically only a document’s author or members of an approver’s group can

access.