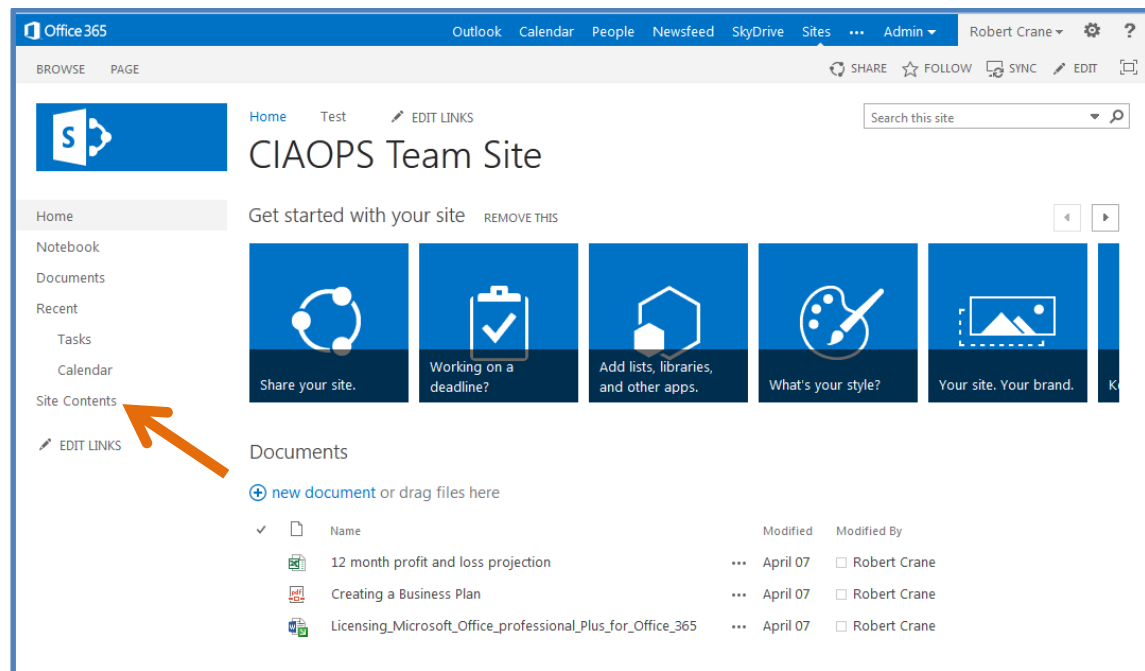


Custom lists

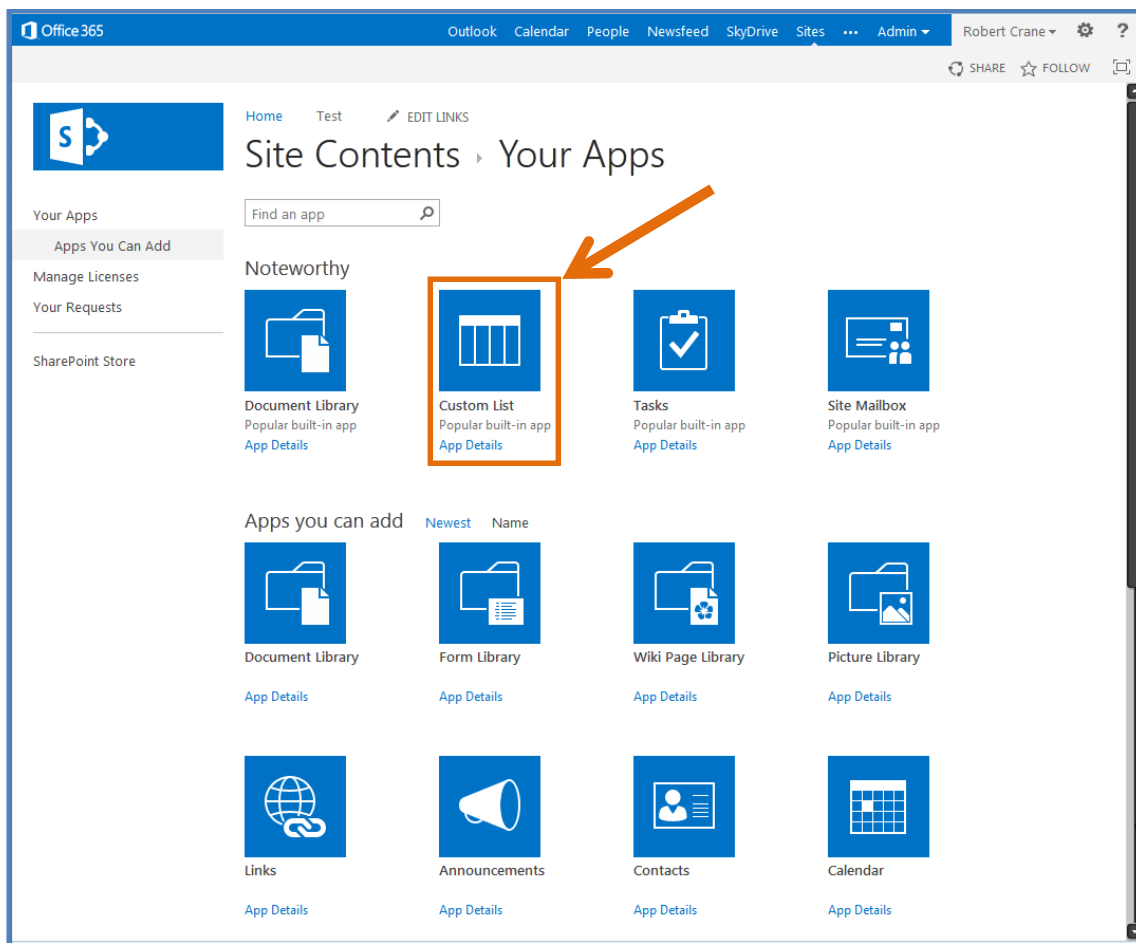
One of the key components of SharePoint is the ability to create a list of items. Much like a traditional spreadsheet, a list is simply a grouping of rows and columns. In SharePoint parlance things like *Tasks*, *Calendars* and *Contacts* are considered lists.

It is however possible to create a *Custom List* in SharePoint in which you specify your own columns. The following steps will take you through the process of doing this. You will need to have permissions to create a new list in your SharePoint site. If you don't then you may have to ask your administrator to provide these to complete these exercises.

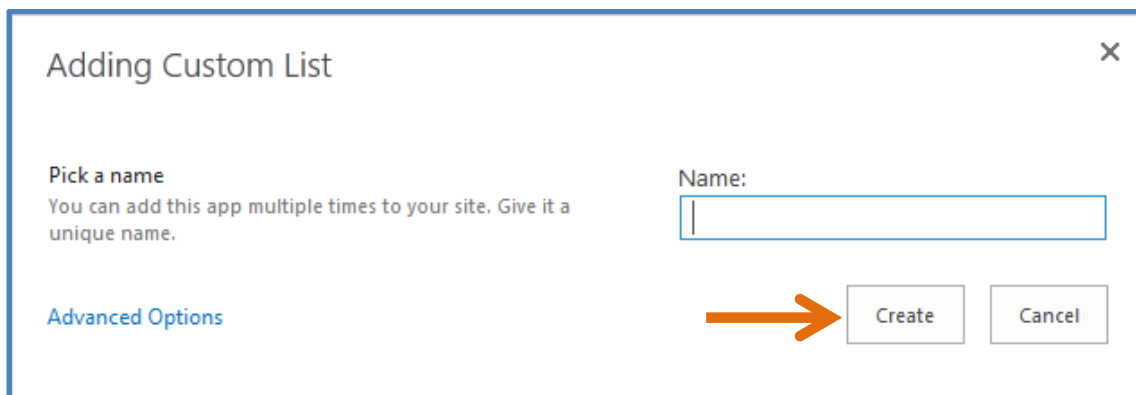


The starting point for this process is the standard SharePoint team site as shown above.

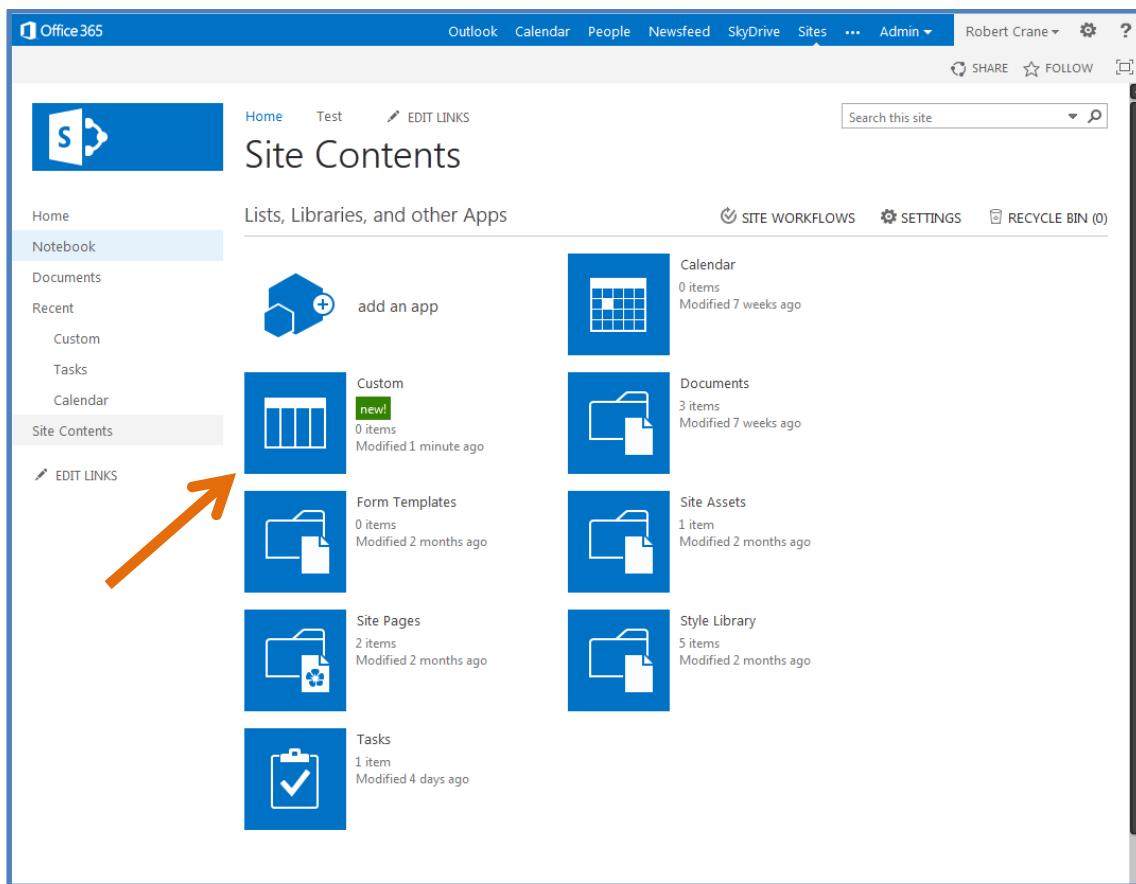
To create a new list, select the **Site Contents** from the bottom of the Quick Launch Menu on the left hand side of the window.



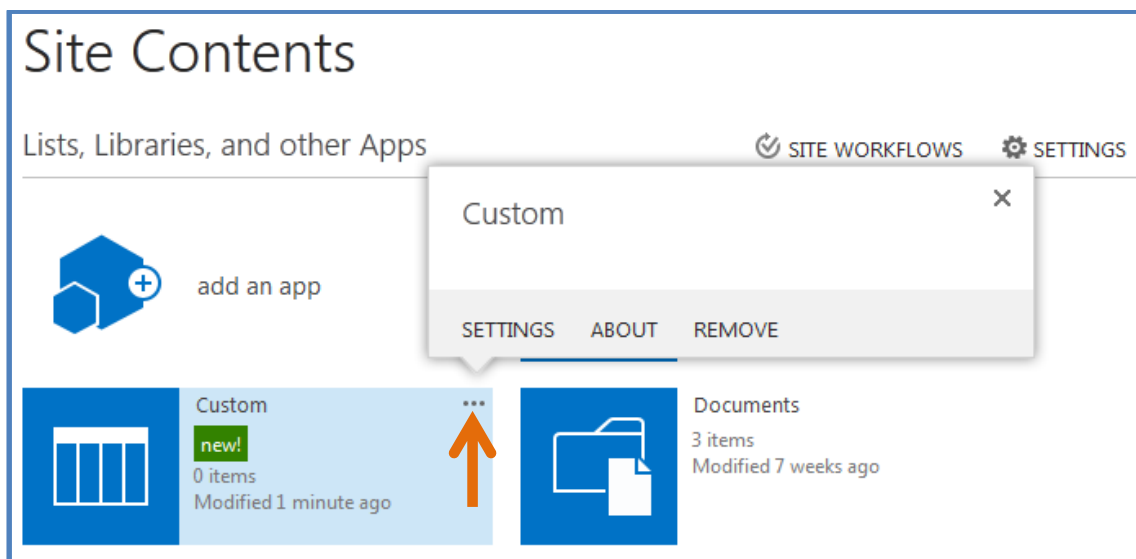
From the *Site Contents* you should see a screen like that shown above. In the list you should find a **Custom List** option. Select this to continue.



Next, you will be prompted to enter a name for this *Custom List*. Simply enter your choice and press the **Create** button. In this case, **Custom** has been used as the name for this list.

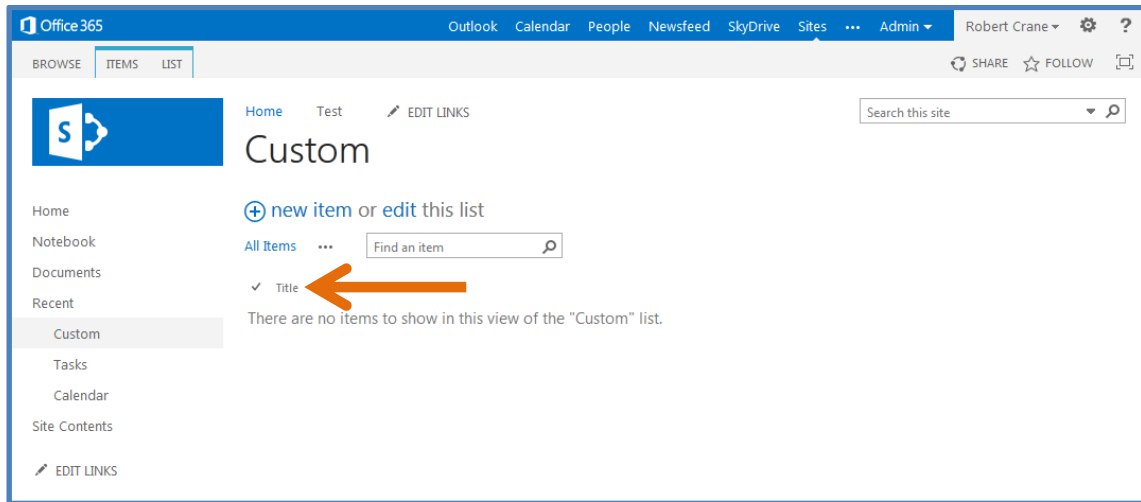


After a few moments the new *Custom List* should be created and displayed in the list of apps as shown above.

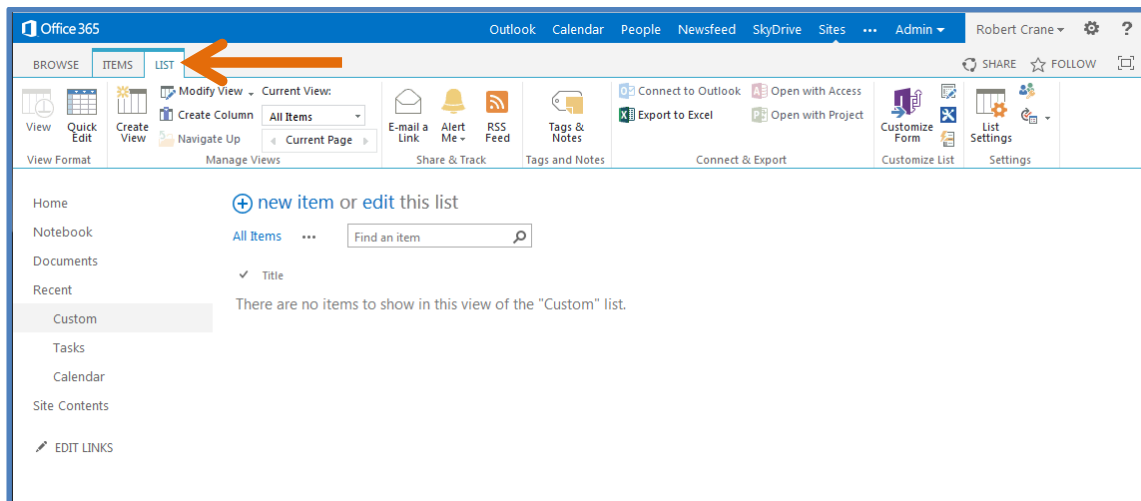


If you now mouse over the new app you should see an **ellipse** (three dots). If you select this you should see a menu dialog appear as shown above. From this dialog you will see a number of options at the bottom including *SETTINGS*, *ABOUT* and *REMOVE*.

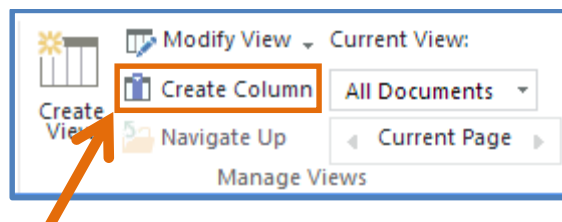
Pressing the icon for the new **Custom List** will now take you to that list.



When you view the *Custom List* you will find that there is only a single column (*Title*) shown. To extend this list you will need to add additional columns.



This can be achieved by firstly displaying the Ribbon Menu. To do this select the **LIST** tab from at the top of the page.



Then from the Ribbon Menu select the **Create Column** button.

Create Column

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- ☐ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ Task Outcome
- ☐ External Data
- ☐ Managed Metadata

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

☐ Yes ☒ No

Enforce unique values:

☐ Yes ☒ No

Maximum number of characters:

You should now be prompted to enter the details for the new column. You will firstly need to give the new column a name. It is generally recommended that any name be short and not contain special characters such as full stops, asterisks, etc. In this case enter the column name as:

First Name

Next, you will have to define what type of information the column will contain. Each option will present different choices further down the page. In this case select **Single Line of Text**.

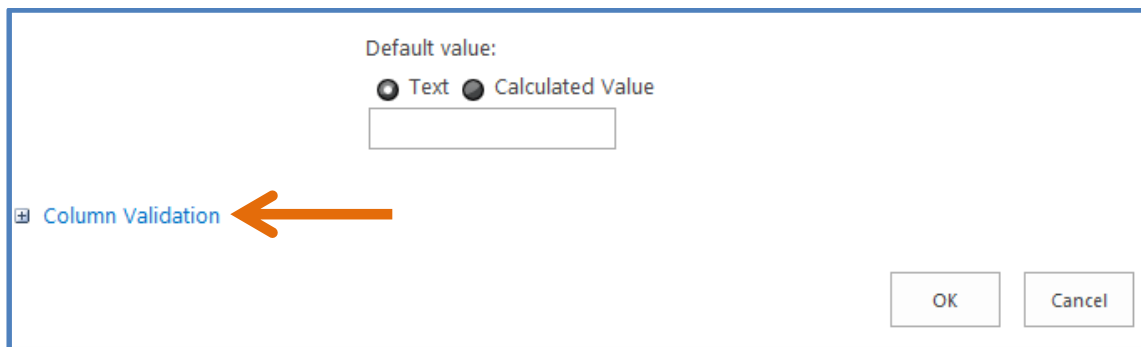
Below this you can enter a *Description* for the column into which you can add more information about the function of this column. Best practice suggest that this should be completed because it may not be you returning to make changes in the future.

Next, you can select whether this column is required to contain information. This means any entry will not be complete until information has been entered into the field. In this case leave the option set to **No**.

Below this you can also enforce whether the value in the field has to be unique, that is you can have more than one entry with the same value in this field. In this case leave the option set to **No** to allow duplicate entries.

Since the selected column type is a single line of text you can also elect to set the maximum number of characters in this field. By default this will be 255, however it can be adjusted if required.

When you have completed setting these options scroll down the screen.



Next, you will see that you can set whether the field will be *Text* or a *Calculated Value*. In this case the option will be left as **Text** however you should note that the column value could actually be a mathematical calculation or a function that depends on other columns if required.

You will also notice that there is an option for *Column Validation*. This allows you to set conditions on the actions that occur in this column. For example you could set a validation that a finish date column has to contain a value that is after a start date. Doing so will improve the integrity of your data.

Column Validation

Specify the formula that you want to use to validate the data in this column when new items are saved to this list. The formula must evaluate to TRUE for validation to pass.

Example: If your column is called "Company Name" a valid formula would be [Company Name]="My Company".

[Learn more about proper syntax for formulas.](#)

Type descriptive text that explains what is needed for this column's value to be considered valid.

Formula:

User message:

If you expand the **Column Validation** option you should see the options displayed above. Validation is obtained by creating a formula to test as shown in the example on the left. The lower dialog box allows you to enter a custom message to display that explains what is required for that column.

When you have completed all the sections scroll down to the bottom of the page and press the **OK** button to save and continue.

+ new item or edit this list

All Items

...

Find an item

✓ Title

First Name

There are no items to show in this view of the "Custom" list.

You should now be returned to the main list page where will see the column that you just created displayed (in this case *First Name*).

You can continue to create additional columns as required by simply repeating the above process for each desired column.

In summary, although SharePoint has a number of pre-defined lists such as calendars, contacts, etc, you have the ability to create your own custom list with the columns you require. All you need to do is give each new column a name and decide what style of data it will hold (text, number, choice etc).

Glossary

Alerts – Are settings that can be made to most components of SharePoint that will send an email to inform of changes in information. They can be customized in respect to what triggers the sending (change, delete, addition, etc) as well as the frequency (immediate, daily, weekly, etc). They are configured by each individual SharePoint user normally at the location they wish to monitor.

Document Library – Are storage locations in SharePoint specifically designed to manage any sort of document (Word, Excel, PDF, etc). Once here, documents can easily be sorted and displayed. It is also possible to configure check in/check out as well as document approval to give better document management than what is normally provided in folders on the local computer.

Office 365 – Is hosted versions of Microsoft Exchange, SharePoint and Lync. They can be purchased as a suite or individually. All of the servers live in Microsoft data centers but can be accessed anywhere an Internet connection is available.

Office Web Apps - is an add-on component to SharePoint that allows Office documents to be displayed and edited in a web browser. Office Web Apps is part of Office 365 by default.

Picture Library – Are similar to Document Libraries but they are specifically designed for the management of images (JPG, BMP, TIFF, etc). They share many features with Document Libraries including the ability to check in/check out document as well as document approval. Importantly, Picture Libraries allow additional descriptive information to make locating images much simpler.

Quick Launch Menu - Is the list of links that normally appear down the left hand side of most pages in a SharePoint site. Clicking on any of these links will take you directly to that location in the SharePoint site.

Recycle Bin – An area into which most items that are deleted go upon deletion. This allows them to be easily recovered if needed. Beware that the contents of the Recycle Bin are not retained indefinitely.

Ribbon Menu – Much like the ribbon that is evident in Office 2010 and 2013 products SharePoint 2013 will now display a ribbon menu to provide you with a greater range of options. The ribbon menu is context sensitive only showing you the options that are available depending on where you are located in SharePoint 2013.

SharePoint – Is the Microsoft technology on which the Office 365 Team Site is based. It is a web front end onto a database in its simplest form. It is accessed via a standard web browser but provides much greater functionality when viewed with Internet Explorer. SharePoint can be used to manage a variety of information sources from documents to ad hoc lists with everything inside it being fully indexed for search ability.

SharePoint Online – Is the hosted version of SharePoint Server 2010 provided by Microsoft via Office 365.

Site Collections – are logical containers for a top level site and child sites below it. It has unique security, sharing, features, galleries, solutions and storage options. Site Collections are created and managed via the SharePoint Admin center in Office 365. Each Site Collection must be assigned a Primary Site Collection Administrator and optional Secondary Administrators.

Views – Are different ways to display the same data. You are able to have a number of different Views of the same data between which you can easily select. Views can also be used to aggregate data within a list such as summing up values in a column, averaging values, or other aggregation functions.

About

Author - Robert Crane BE MBA MCP

Robert has a degree in Electrical Engineering as well as Masters of Business Administration. He is also a Small Business Specialist and Microsoft Certified SharePoint Professional. Robert has over 20 years of IT experience in a variety of fields and positions, including working on Wall St in New York. Since 2012 he was recognized with a Microsoft Most Valuable Professional (MVP) Award for his work with Office 365. He continues his involvement with information technology as the Principal of the Computer Information Agency. Apart from resolving client technical issues, Robert continues to present at seminars as well as write on a number of topics for the Computer Information Agency including being involved in the SMBITPro community in Sydney. Robert can be contacted via director@ciaops.com.

Company – Computer Information Agency (www.ciaops.com)

Founded in 1995, the Computer Information Agency is a specialized technology consultancy in Sydney, Australia that focuses on assisting businesses and individuals improve their productivity using technology and smart business practices. The Computer Information Agency has high levels of experience in technologies such as Windows Servers, including Small Business Server, and desktop applications such as Outlook, Word, Excel and OneNote.

With special emphasis placed on the business benefits of technology the Computer Information Agency is unique in its ability to work with companies to improve and streamline their processes utilizing the technology they already have in place. The focus is on providing an improved end result for the business which in the long run leads to greater productivity and profitability. More information about the Computer Information Agency can be found at <http://www.ciaops.com>.