Working with SharePoint Lists
(Microsoft Corporation)

Suppose a team from your company, Contoso Corporation, has an upcoming customer meeting with Trey Research. You and your team have tasks to complete in preparation for that meeting. To keep track of these work items, you'll create a new tasks list on your SharePoint site. You'll then create columns, add items to the list , and learn about display options for items in that list.

Before you Begin

To complete this tutorial, you'll need a Windows SharePoint Services site. It's best to try out these tutorials on a site that's not being used by a team. Your system administrator can create one for you or you can create a site beneath your team's current site as described in this section. Make sure you are a member of the Administrator or Web Designer site groups or a site group with the Add and Customize Pages right on the new site.

Create a Practice Site

You can create a subsite under the current site if you are a member of the Administrator site group or a member of a site group that has the Create Subsite right. If you are not a member of the Administrator site group, ask the site administrator to create a subsite for you. Make sure you are a member of the Web Designer or Administrator site group in the new subsite.

1. On the top link bar, click **Create**.

2. At the bottom of the page in the **Web Pages** section, click **Sites and Workspaces**.

3. In the **Title and Description** section, type a name, such as **List Tutorial**, and a description for the new site. For example, you can type **Working with Lists Practice Site** for the description of this site.

4. In the **Web Site Address** section, type the Web address (URL). The first part of the address is provided for you. For the second part, type **list-tutorial**.

5. In the **Permissions** section, click **Use same permissions as parent site**.

6. Click **Create**.

7. On the Template Selection page, click **Team Site**, and then click **OK**.
   After the site is created, it appears in your browser.

Add Sample Users

The site you use will need to have at least three users, including yourself. If you created a new site using the instructions in previous section, you should already have some users to work with from the parent Web site. Using accounts from the parent site won't affect the users in any way — you'll simply be using their names. If you're using a trial hosted site, or an administrator created a site for you without any users, you can add made-up users to the site. To add users to a site that doesn't have at least three users (including yourself), complete the following steps. To complete these steps you must be a member of the Administrator site group or a site group with the Manage Web Site right.

1. On the top link bar of your SharePoint site, click **Site Settings**.

2. On the Site Settings page, in the **Administration** section, click **Manage Users**.

3. On the Manage Users page, click **Add Users**.

4. In the **Step 1: Choose Users** section specify the two users that you want to add, separated by semicolons. You can enter:

   - E-mail addresses (for example, user1@example.com; user2@example.com)

   - User names (for example, DOMAIN\user_name)

   - Microsoft Active Directory directory service security group names (for example, DOMAIN\security_group_name)

   - Domain group names (for example, DOMAIN\group_name)

   - Cross-site group names (for example, Accounting)

5. In the **Step 2: Choose Permissions** section, select the **Reader** check box, and then click **Next**. Because these users won't actually be interacting with this site, there's no need to give them sufficient permissions to make changes.

6. In the **Step 3: Confirm Users** section, verify the e-mail addresses, user names, and display names.

7. In the **Step 4: Send E-mail** section, clear the **Send the following e-mail to let these users know they've been added** check box. Because this tutorial is just for practice, you don't want to send e-mail messages to these users.

8. Click **Finish**.

In the tutorial, we'll refer to the users you added as User1 and User2. With the site and users prepared, you're ready to start working with SharePoint lists.

About SharePoint Lists

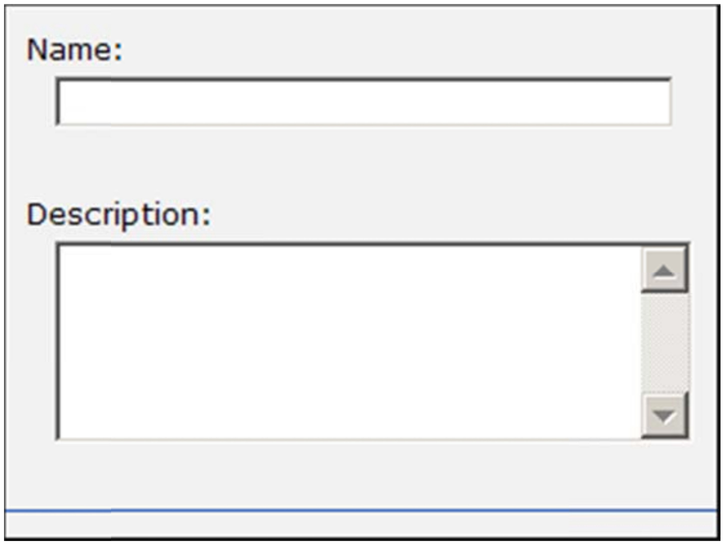
A list in your Web site based on Microsoft Windows SharePoint Services is a collection of information that you share with team members. For example, you can create a sign-up sheet for an event, or you can create a tasks that you need to track.

You can use the lists that come with your site as is, you can change or delete lists that you don't use, and you can create your own lists. Windows SharePoint Services has templates for links, announcements, contacts, events, tasks, and issues lists. When you create your own lists, you can base them on the designs used for the built-in lists, or you can create custom lists from scratch. In this example, you'll create a list based upon the Tasks template.
If you have a Windows SharePoint Services-compatible program such as Microsoft Office Excel 2003 and Microsoft Internet Explorer 5 or later installed, you can create lists that are based on spreadsheets.

Creating a List

After you have access to a site, you're ready to create the list to track your team work items for the upcoming visit. To complete the following steps, the account you use to access the site must be a member of the Administrator or Web Designer site groups or a site group with the Add and Customize Pages right.

1. In the top link bar, click **Create**.
2. On the Create Page page, click **Tasks**.
3. In the **Name** box, type the name for the list: **Trey Research Visit Tasks**.



4. In the **Description** box, type the description **Trey Research visit work items**.

5. In the **Navigation** section, click **Yes** to put a link to this list on the Quick Launch bar on the home page.

In a site with only a few lists, it's a good idea to choose **Yes** here. Having a list on the Quick Launch bar makes it easier for site users to find it. But in sites with many lists and libraries, you'll want to include only the most commonly used lists and libraries or the Quick Launch bar will get too long.

6. Click **Create**.

   The new tasks list appears in your Web browser. Site users can get to the new list by clicking **Documents and Lists** on the top link bar, and then clicking the list name in the **Lists** section. If you chose to add the list to the Quick Launch bar, users can also click the list name there to open it.

Adding a Column

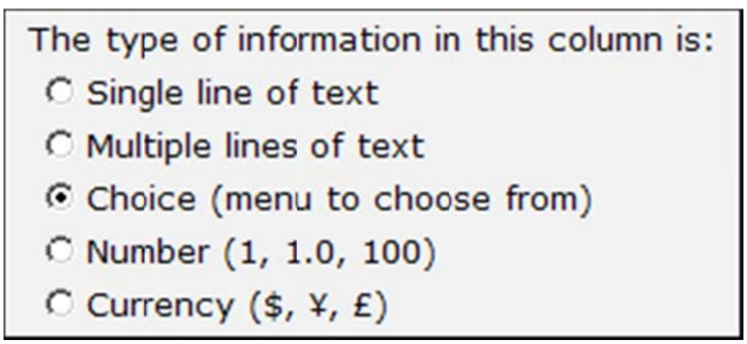
When you create a tasks list, it comes with many useful columns for tracking your tasks. Default columns can track priority, status, task ownership, and time constraints. For the upcoming visit to Trey Research, you can add a column to help categorize the tasks as related to either travel planning, legal research, market research, or part of the presentation your team is making. Having this column will also be useful in the sections of these tutorials that cover sorting, filtering, and creating views later.

1. Go to the tasks list you created in the previous set of steps (if you're not already there): On the top link bar, click **Documents and Lists**. On the Documents and Lists page, click the name of the tasks list (**Trey Research Visit Tasks** in this example).

2. Click **Modify settings and columns**.

3. In the **Columns** section, click **Add a new column**.

4. In the **Name and Type** section, in the **Column name** box, type **Area**, and then click **Choice (menu to choose from)**.



5. In the **Optional Settings for Column** section, type **Functional area for each work item** as the description for the column.

6. In **Require that this column contains information**, click **Yes**.

7. In the **Type each choice on a separate line** box, replace the placeholder text with the following entries:

   - Travel Plans
   - Legal Research
   - Market Research
   - Presentation

8. In **Display choices using** option, click **Drop-Down Menu**.

In this case, the **Radio Buttons** option would work as well. The **Checkboxes** option allows users to choose more than one area; however, that's not a good choice for this exercise, since you will sort on only one category.

9. In the **Allow fill-in choices** option, click **No**.
If you know that the number of categories is going to increase over time, it's good to enable this option. However, in this example each functional area will have an owner assigned, so you want to control which categories appear. You don't want users to create categories that don't have an owner to track.

10. In **Default value**, make sure **Choice** is selected. The first item in the list (Travel Plans, in this case) is the default.

11. Make sure the **Add to default view** check box is selected.

12. At the bottom of the page, click **OK**.

Now that you've added the **Area** column, you're ready to add some items to the tasks list. After that's done, you'll be ready to learn about different ways to view the list information.

Adding Items to a List

1. Go to the tasks list you created earlier (If you're not already there): On the top link bar, click **Documents and Lists**. On the Documents and Lists page, click the name of the tasks list (**Trey Research Visit Tasks** in this example).

2. At the top of the list, click **New Item**.

3. In the **Title** box, type **Plane tickets**.

4. You don't need to change the default information for the **Priority**, **Status**, and **% Complete** fields.

5. In the **Assigned to** field, choose your name.

6. In the **Start Date** and **Due Date** boxes, click the calendar, select a date, and then select a time in the hour and minutes boxes.

7. In the **Area** box, click **Travel Plans**.

8. Click **Save and Close** at the top of the form.

Now to give you some more information to work with, go back and add the items listed in the following table.

If you don't see the names of the users in the **Assigned to** option, they may need to visit the site and interact with it, such as by adding an item to a list and then deleting it. This is a common problem when you add users as part of a Windows NT Security group or when a site allows anonymous access.

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TITLE	ASSIGNED TO	PRIORITY	AREA
Plane tickets	Yourself	2	Travel Plans
Hotel rooms	User1	2	Travel Plans
Patent search	User2	1	Legal Research
Contract proposal	User2	1	Legal Research
Presentation	Yourself	1	Presentation
Focus group	User1	2	Market Research

You can add, edit, and delete list times much more quickly if you have a Windows SharePoint Services-compatible datasheet program, such as Microsoft Office 2003 Professional, installed. Datasheet programs allow you to work with list entries just as you would in a spreadsheet program, such as Microsoft Office Excel 2003, without having to switch to a separate program. To use the datasheet program, just click the **Edit in Datasheet** button at the top of the list.

Sorting a List by Column

You can use any column of a list or library to sort items. In the following steps, you'll sort the tasks list you created in Part 1 of this tutorial by the team member responsible for it.

Sort a List

1. Go to the tasks list you created earlier (if you're not already there): On the top link bar, click **Documents and Lists**. On the Documents and Lists page, click the name of the tasks list (**Trey Research Visit Tasks** in this example).

2. Click the **Assigned to** column heading.
   If you want to reverse the sort order (ascending or descending), click the name of the column again. An arrow next to the column name indicates the direction of the sort.

Filtering a List

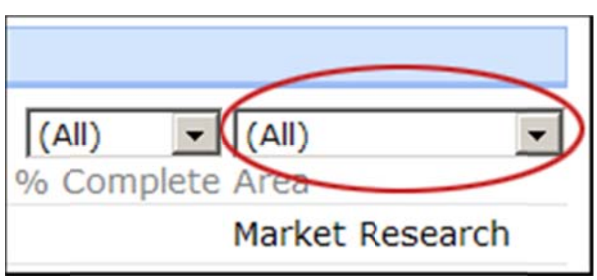
Filtering is a quick and easy way to find and work with a subset of entries in a list or library. A filtered list displays only the rows that meet the criteria you specify for a column. Unlike sorting, filtering does not rearrange the items. Filtering hides rows you do not want to appear. In the following steps, you'll filter the tasks list so only the items related to travel plans appear.

Filter a List

1. Go to the tasks list you created earlier (if you're not already there): On the top link bar, click **Documents and Lists**. On the Documents and Lists page, click the name of the tasks list (**Trey Research Visit Tasks** in this example).

2. On the toolbar, click **Filter**.
   A drop-down list appears above each column containing all of the values for that column.

3. Click the list for the Area column, and then click **Travel Plans**.

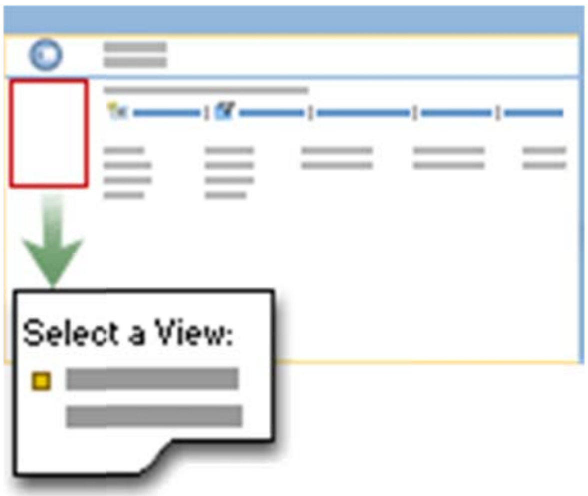


You can continue to apply additional filters until only the desired items appear. To remove a filter, click **All** in the drop-down list for the filtered column. Other filters are unaffected.

About Custom Views

Views make it easy to see information in a variety of ways. You can use views in lists (such as Announcements, Contacts, and so on), and you can also use them in libraries, surveys, and discussion boards.

When you create a view, a link to the view is added to the Select a View section on the page that displays the list. An indicator marks the active view, as shown:



You can create custom views to do one or more of the following:

- Filter by a set of criteria
- Sort in a particular order
- Hide or show columns
- Group information based on list data
- Display subtotals of columns
- Show lists with date information as calendars or tables

For example, instead of applying the same filter every time you go to a particular list, you can create a view that includes the filter. To see the filtered information, you can click the link to the view you created. You can even make your new view the default public view, so that when your team members go to the page that displays a list they automatically see the filtered information.

Types of Views

In this tutorial, you'll create a public view of items belonging to each user, sorted by area. All users can see and use this view. You also have the option of creating a personal view. Other site users will see only public views and their own personal views.

You'll be creating a standard view, as opposed to a datasheet or calendar view. Standard views display list information in the manner that you specify. You can view and work with list data from any supported Web browser. Standard views require no special software on your computer. In a standard view, you filter, update, add, or delete items one at a time.

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Datasheet views require that you have a Windows SharePoint Services-compatible datasheet program installed, such as Microsoft Office 2003 Professional. Datasheet programs allow you to quickly add, delete, and update list entries just as you would in a spreadsheet program, such as Microsoft Excel, without having to switch to a separate program.

Another type of view is a calendar view. If your list includes a column with dates, you can create a view that displays the list as a calendar. This feature allows you to create a custom list that you can view either as a standard tabular view, or as a calendar. You can switch between the two views quickly.

Creating a View

In the following steps, you'll create a view that displays your tasks, grouped by Area. When your team members use the view, they'll see their own tasks, grouped by Area.

Create a View

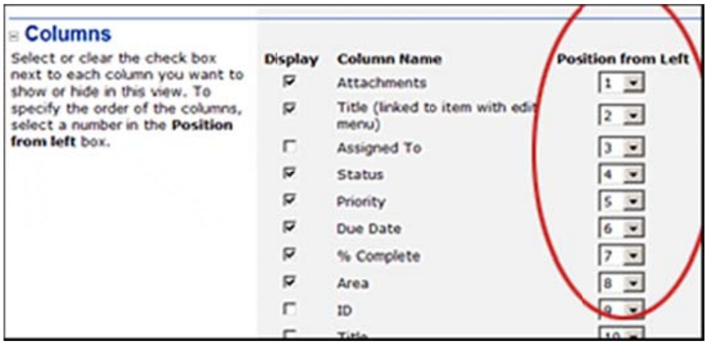
1. Go to the tasks list you created earlier (if you're not already there): On the top link bar, click **Documents and Lists**. On the Documents and Lists page, click the name of the task list (**Trey Research Visit Tasks** in this example).

2. Click **Modify settings and columns**.
3. Under **Views**, click **Create a new view**, and then click **Standard View**.
4. On the Create View page, in the **Name** section, type **My Tasks by Area**.
5. In the **Audience** section, click **Create a public view**.

6. In the **Columns** section, you choose which columns appear in this view. Select the following columns and clear the rest:

   - Attachments
   - Title (linked to item with edit menu)
   - Status
   - Priority
   - Due Date
   - % Complete
   - Area

7. The numbers on the right show the position for each column.

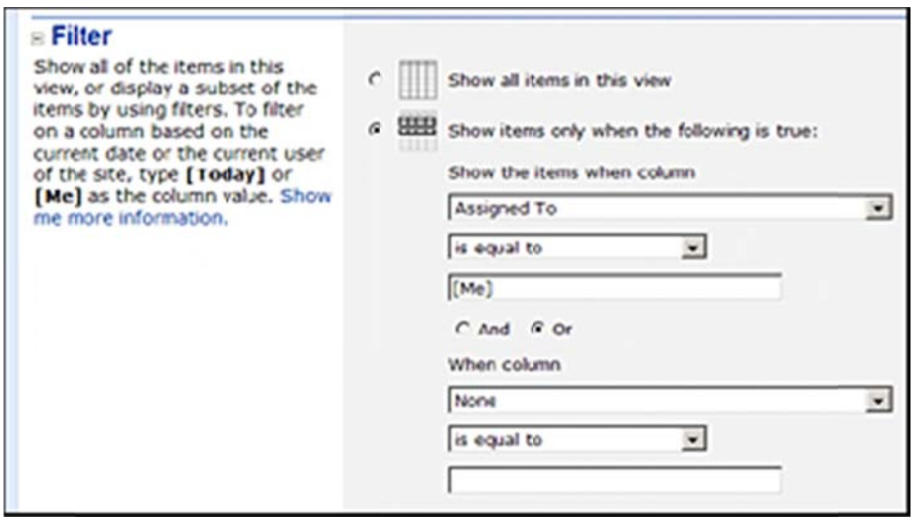


Suppose the Priority and Area columns are important to you. You'll want them to appear closer to the left side of the view than to the right. Change the numbers so that the columns appear in this order:

COLUMN	ORDER
Attachments	7
Title (linked to item with edit menu)	1
Status	5
Priority	2
Due Date	4
% Complete	6
Area	3

8. In the **Filter** section, click **Show items only when the following is true**.
9. In the first of **Show the items when column** menus, click **Assigned to**.
10. Leave the second menu set to **Is equal to**.
11. In the text box below the second menu, type **[Me]**.

    Entering [Me] here will the tasks assigned to the current user, so all members of your team can use the same view and see only their items. When you're finished, it should look like the following:



12. Click the plus sign (+) next to **Group By** to expand the Group By section.
13. In the **Group By** section, in the list under **First group by the column**, click **Area**.
14. Select **Show items in ascending order** or **Show items in descending order**.
15. Under **By default, show groupings**, select **Expanded**.

    Expanded groupings show the grouping title and all items. Collapsed groupings show only the title of the grouping.

16. At the bottom of the page, click **OK**.

17. On the Customize Trey Research Visit Tasks page, click **Go back to "Trey Research Visit Tasks."**

At any time you can delete a view by clicking **Delete** at the bottom of the Edit View page. The default view of a list, document library, or discussion board cannot be deleted. To delete the current default view, set another view as the default, and then delete the original default view.
After you finish this tutorial, you can delete your practice site so that you don't waste your server resources. (You must be a member of the Administrator site group for your site to delete it. If you are not a member of the Administrator site group, you can ask the person who created the site for you to delete it.)

Delete a Site

1. Click **Site Settings** on the top link bar of your site.

2. On the Site Settings Page, click **Go to Site Administration**.

3. On the Site Administration page, in the **Management and Statistics** section, click **Delete this site**.

4. On the confirmation page, click **Delete**.