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SharePoint 2010

Designing Lists for Site Owners

Class Scope and Purpose

■ Description

- This class covers the basics of creating, customizing, and maintaining SharePoint lists.

■ Audience

- Users who have been designated as site owners.

■ Prerequisite

- SharePoint 2010 – Working with Lists for End Users

Class Main Topics

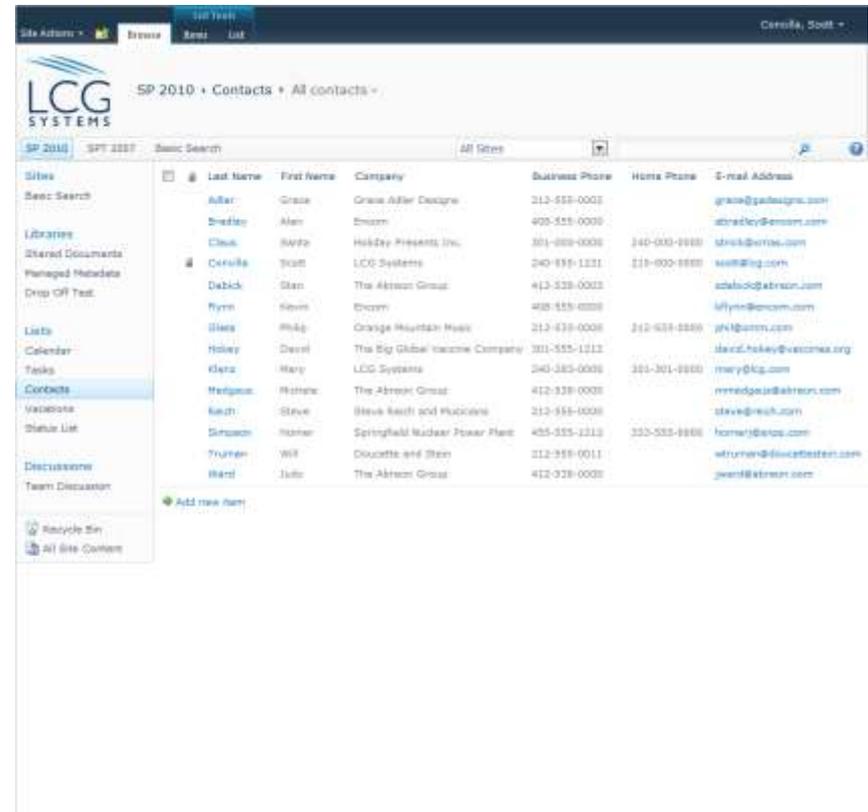
- Reviewing Basic List Concepts
- Creating a List
- Customizing the List Settings
- Working with Columns
- Working with Site Columns
- Validating Data
- Working with Views
- Managing a List

Reviewing Basic List Concepts

- Defining Lists
- Built-in Lists
- Custom Lists
- List Tasks and Permissions

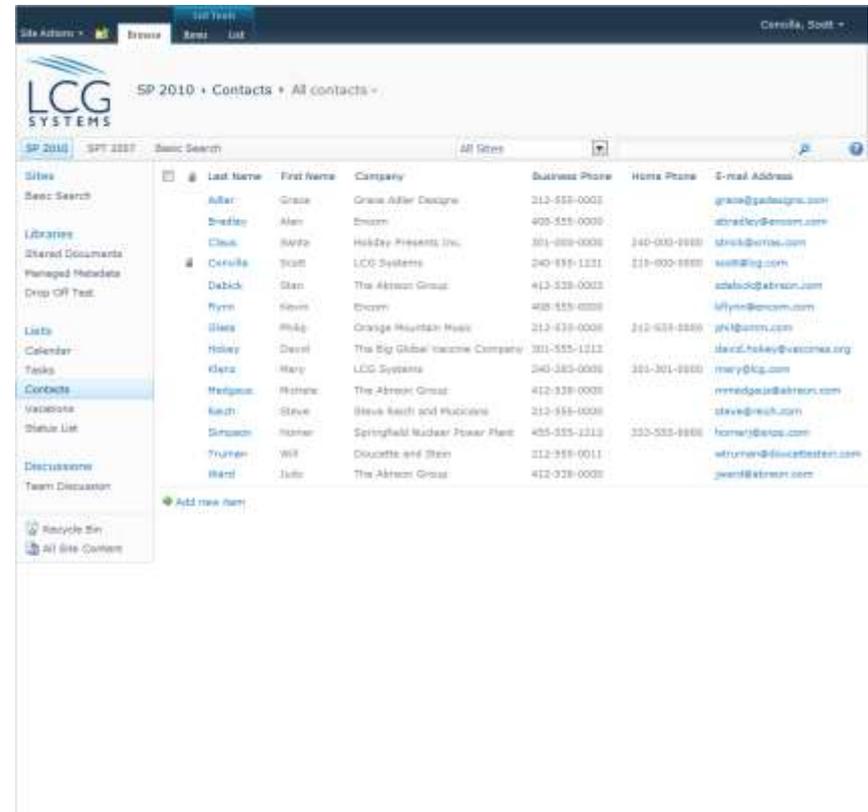
Defining Lists

- A list is a collection of similar items.
 - Contact info
 - Calendar events
 - Inventory items
- Lists group items together for later retrieval or usage.



Defining Lists

- SharePoint lists store data and information, **not files**.
- List data is organized into columns and rows like an Access table or Excel spreadsheet.



The screenshot shows a SharePoint 2010 interface for a 'Contacts' list. The list is displayed as a table with columns for Last Name, First Name, Company, Business Phone, Home Phone, and E-mail Address. The data is organized into rows, each representing a contact. The interface includes a navigation pane on the left with options like 'Basic Search', 'Libraries', 'Calendar', and 'Tasks'. The 'Contacts' list is currently selected and highlighted.

Last Name	First Name	Company	Business Phone	Home Phone	E-mail Address
Adler	Grace	Grace Adler Design	212-555-0001		grace@adlerdesign.com
Brecher	Alan	Encom	408-555-0000		abrecher@encom.com
Chou	Kevin	Hobley Presents Inc.	301-800-0000	340-000-9999	stuck@hobley.com
Corvick	Scott	LCG Systems	240-899-1231	218-000-9999	scott@lsg.com
Dabick	Stan	The Abreon Group	412-528-0001		sdabick@abreon.com
Flynn	Kevin	Encom	408-555-0000		kflynn@encom.com
Giles	Mark	Orange Mountain Press	212-638-0000	212-638-0000	mark@ompress.com
Holley	Devil	The Big Global Income Company	301-555-1212		devil.holley@vacomax.org
Kertz	Mary	LCG Systems	240-385-0000	301-301-9999	mary@lsg.com
Medigos	Matthew	The Abreon Group	412-528-0000		mmedigos@abreon.com
Reich	Steve	Steve Reich and Musicians	212-555-0000		steve@reich.com
Simson	Homer	Springfield Nuclear Power Plant	455-555-1212	333-555-9999	homer@snpp.com
Truman	Will	Doucette and Stein	212-338-0011		wtruman@doucette.com
Ward	Julie	The Abreon Group	412-528-0000		jward@abreon.com

Built-in Lists

- SharePoint has many built-in list templates and types.
- The starred types can be connected or linked to Outlook.
- Built-in lists can be customized as needed.

Built-In Lists
Calendars *
Contacts *
Announcements
Tasks *
Links
Discussion Boards *
Issue Tracking
Surveys

Custom Lists

- Custom lists can be created when there isn't a template that meets your needs.
 - Essentially, this is creating a list "from scratch".

Custom Lists
Grant Data
Science Data
Research Data
Web Usage Report
References List
Accomplishments
Registrations

List Tasks and Permissions

TASKS THAT CAN BE DONE BY ANYONE

- Viewing item details *
- Sorting list data
- Filtering list data
- Changing the list view

TASKS THAT MAY REQUIRE EXTRA PERMISSIONS

- Viewing item details *
- Adding list items
- Modifying list items
- Deleting list items
- Creating views
- Adding or modifying list columns
- Changing list settings

Creating a List

- When to Create New Lists
- Creating a New List
- Guidelines for Naming a List
- Setting the Initial List Options
- Creating a List Using a Template
- Creating a Custom List
- Creating a List by Importing from Excel

When to Create New Lists

- When deciding whether to create a new list, consider the following:
 - What is the purpose of the list?
 - Who needs access to the list?
 - What features and options do you need in the list?



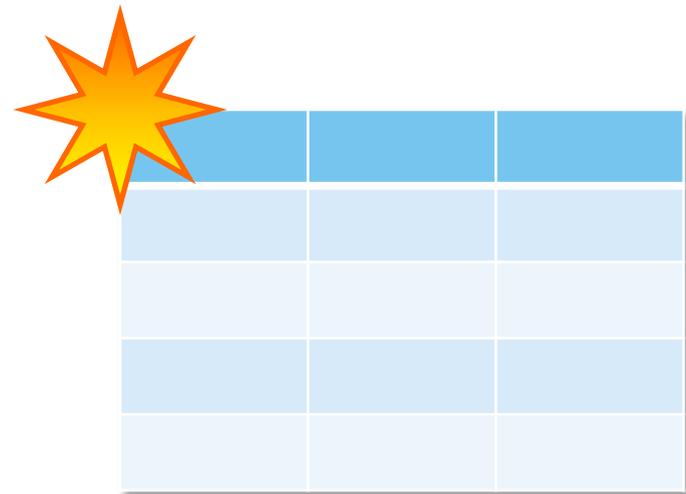
When to Create New Lists

- Some possible reasons for a new list:
 - File metadata that you need or want is different.
 - Access permissions need to be different.
 - Using workflows that are specific to documents in the library.
 - Documents need version control and approvals.



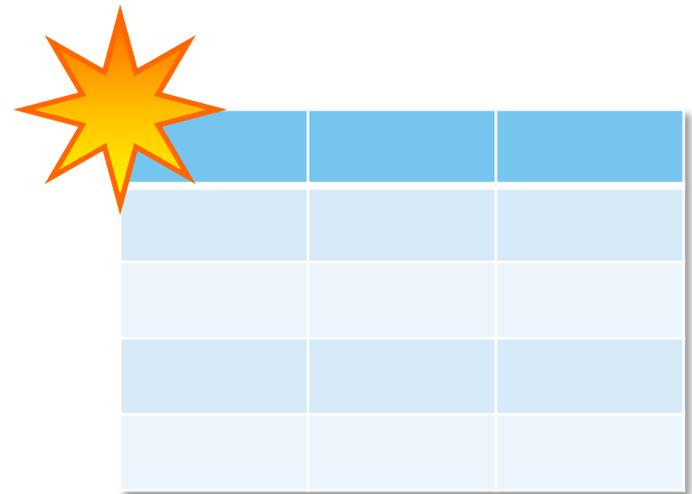
Creating a New List

- There are four primary methods for creating a new list:
 - Use a built-in template
 - Create a list from scratch (custom list)
 - Import a spreadsheet from Excel
 - Use a previously created list as a template



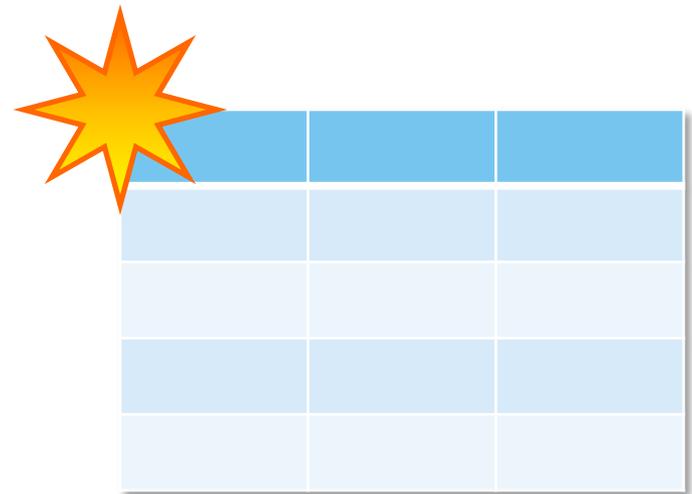
Creating a New List

- In this section, we will look at the first three methods.
- The last method (using an existing list as a template) will be addressed in a later section.



Creating a New List

- Before we look at any of the methods for creating a new list, we need to go over some guidelines and options that apply to all methods.



Guidelines for Naming a List

- Due to technical limitations, SharePoint URLs cannot be longer than 255 characters.



URL = server + site + list name + folder name + file name

- The following is a typical URL for a file:

<http://www.contoso.com/sites/marketing/Shared%20Documents/Promotional%20Brochures/Some%20File.xlsx>

Notice how spaces translate into three characters (%20)!

Guidelines for Naming a List

- When **initially** creating and naming a list:
 - Use a short name
 - Do not use spaces
 - Do not use special characters
- After the list has gone through the initial creation and naming process, go back to the **List Settings** and change the Title/Name of the list.



Guidelines for Naming a List

For example, instead of naming a list:

Department Contacts

Give it a short name when creating the list:

deptcont

Then return to the **List Settings** and alter the **Name** to your original, “more user friendly” choice.



Setting the Initial List Options

- For almost all list types, the first option is to just **Name** the list.
- These two list types do not give you any options at the start:
 - External List
 - Import Spreadsheet



Setting the Initial List Options

- The **More Options** button provides access to additional settings.
 - All list types add **Navigation**
 - Calendar adds **Group Calendar Options**
 - Survey adds **Survey Options**



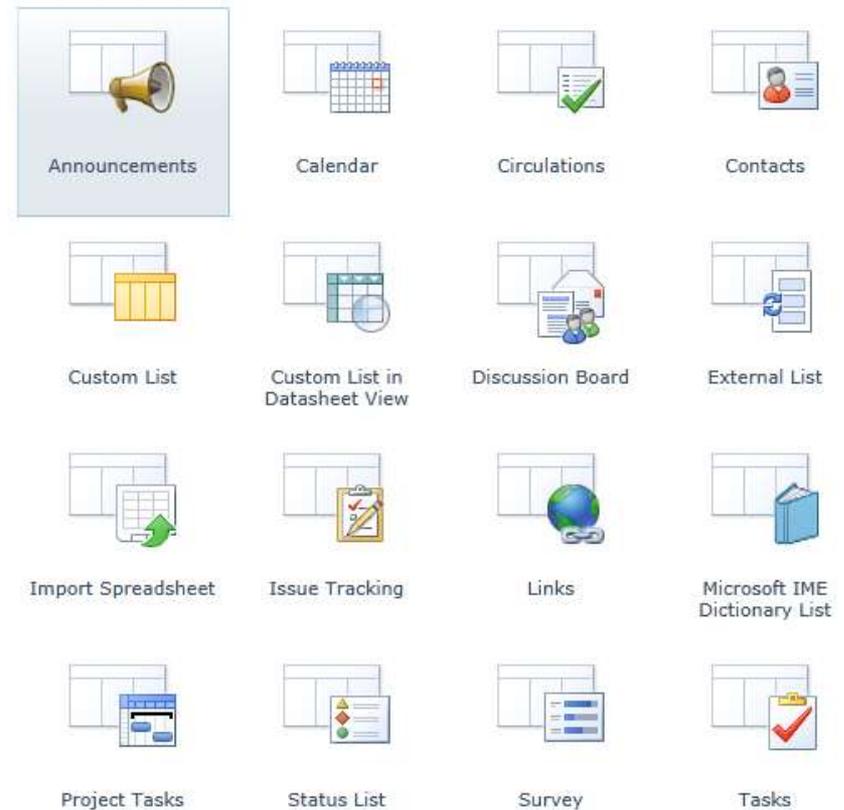
Setting the Initial List Options

- All settings of all list types can be changed later on the **List Settings** page.



Creating a List – By Template

- SharePoint includes over a dozen built-in templates for creating a list.
- Templates can be used as-is, or they can be customized as needed later.

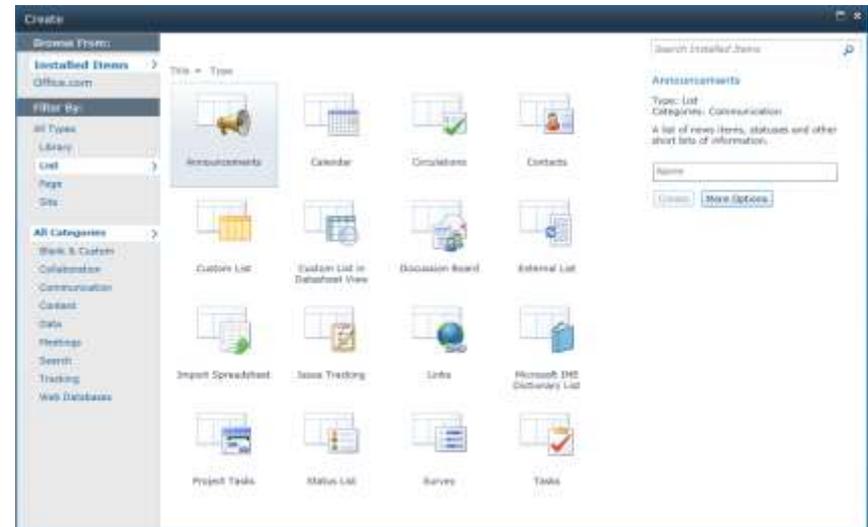


Creating a List – By Template



Procedure

1. Select the **Site Actions** menu and choose **More Options**.
2. In the **Filter By** section, select **List**.
3. In the middle pane, select the desired list type.

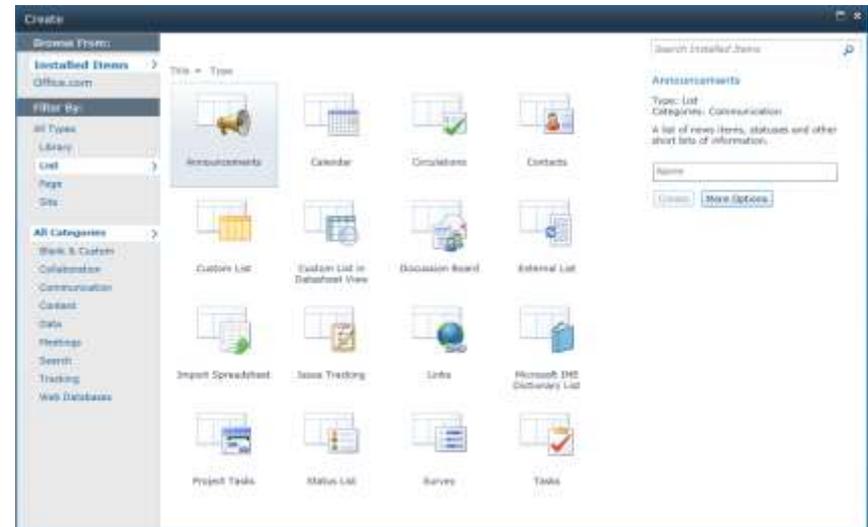


Creating a List – By Template



Procedure (continued)

4. Give the list a **Name**.
 - Remember the guidelines discussed earlier for list names.
5. Select **More Options** if desired or needed.
6. Click **Create** when finished.



Creating a List – Custom

- If none of the built-in list templates meet your needs, you can create a custom list.
- This is essentially “creating a list from scratch”.



Creating a List – Custom

- Once the basic list is created, you will need to create everything including:
 - Column names
 - Column types
 - List settings
 - List views

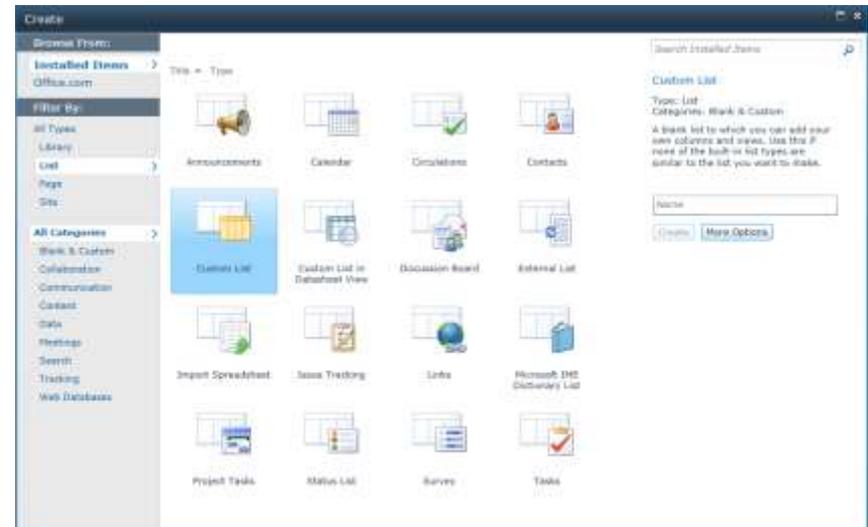


Creating a List – Custom



Procedure

1. Select the **Site Actions** menu and choose **More Options**.
2. In the **Filter By** section, select **List**.
3. In the middle pane, select **Custom List**.
4. Give the list a **Name** and **Create** it.



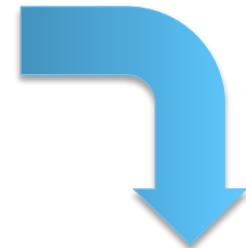
Creating a List – By Importing

- SharePoint has the ability to create a new list by importing an existing spreadsheet.



Creating a List – By Importing

- SharePoint can import any of the following from a spreadsheet
 - An existing data table (Table Range)
 - A range of named cells (Range Name)
 - Any block of cells with defined column headers and data (Range of Cells)



Creating a List – By Importing

- Importing can **only** be done in the creation of a **new** list.
- You **cannot** import data into an existing SharePoint list.

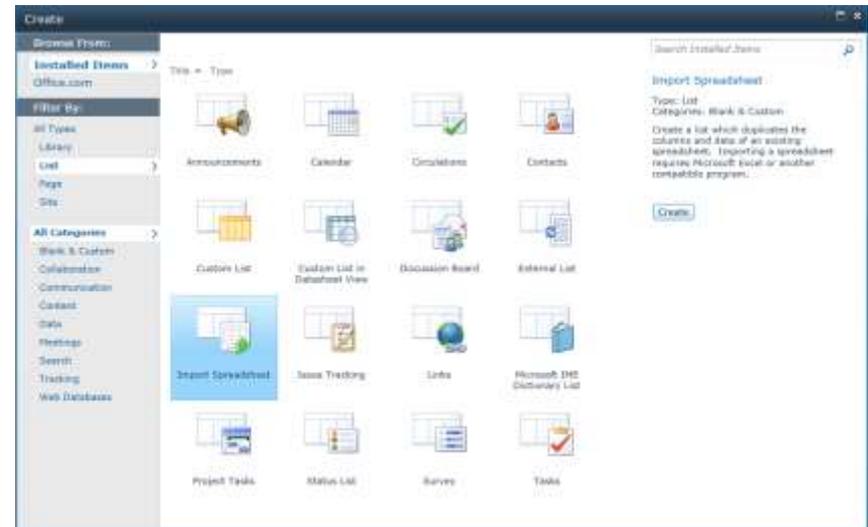


Creating a List – By Importing



Procedure

1. Select the **Site Actions** menu and choose **More Options**.
2. In the **Filter By** section, select **List**.
3. In the middle pane, select **Import Spreadsheet**.
4. Click **Create**.



Creating a List – By Importing



Procedure (continued)

5. Enter a **Name** and **Description** of the list.
6. Click **Browse** and select a file.
7. Click **Import**.

Name and Description

Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this list.

Name:

Description:

Import from Spreadsheet

Specify the location for the spreadsheet you want to use as the basis for this list.

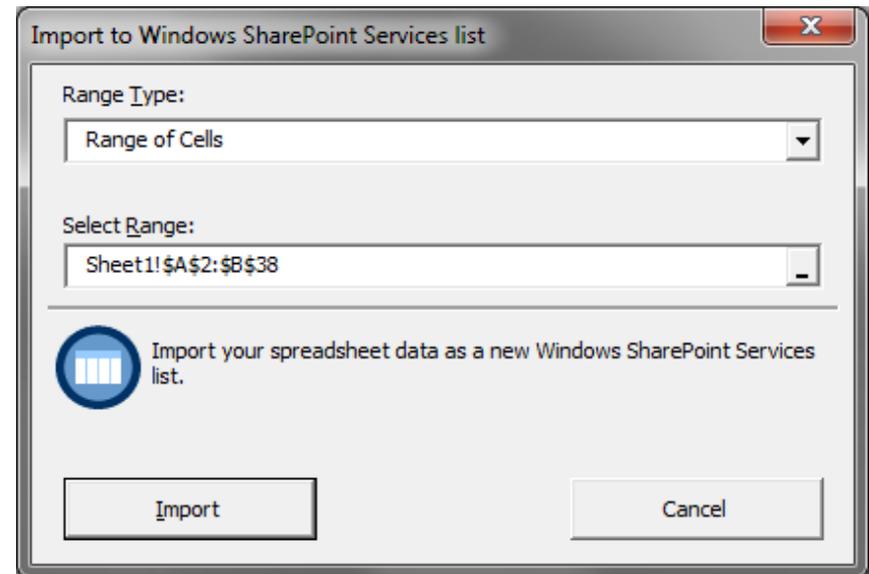
File location:

Creating a List – By Importing



Procedure (continued)

8. Excel will open with the spreadsheet displayed.
9. In the dialog box, select the **Range Type** you are importing and then **Select Range**.
10. Click **Import**.



Customizing the List Settings

- About List Settings
- Accessing the List Settings
- Title, Description, and Navigation Settings
- Versioning Settings
- Advanced Settings

About List Settings

- Once a list has been created, there are many settings and options that can be customized for the specific needs and uses of the list.

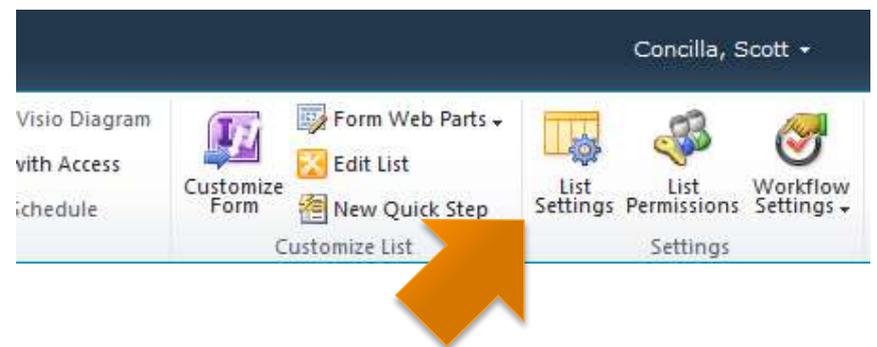
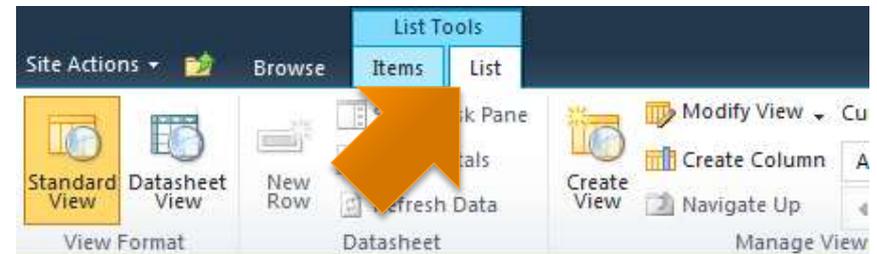


Accessing the List Settings



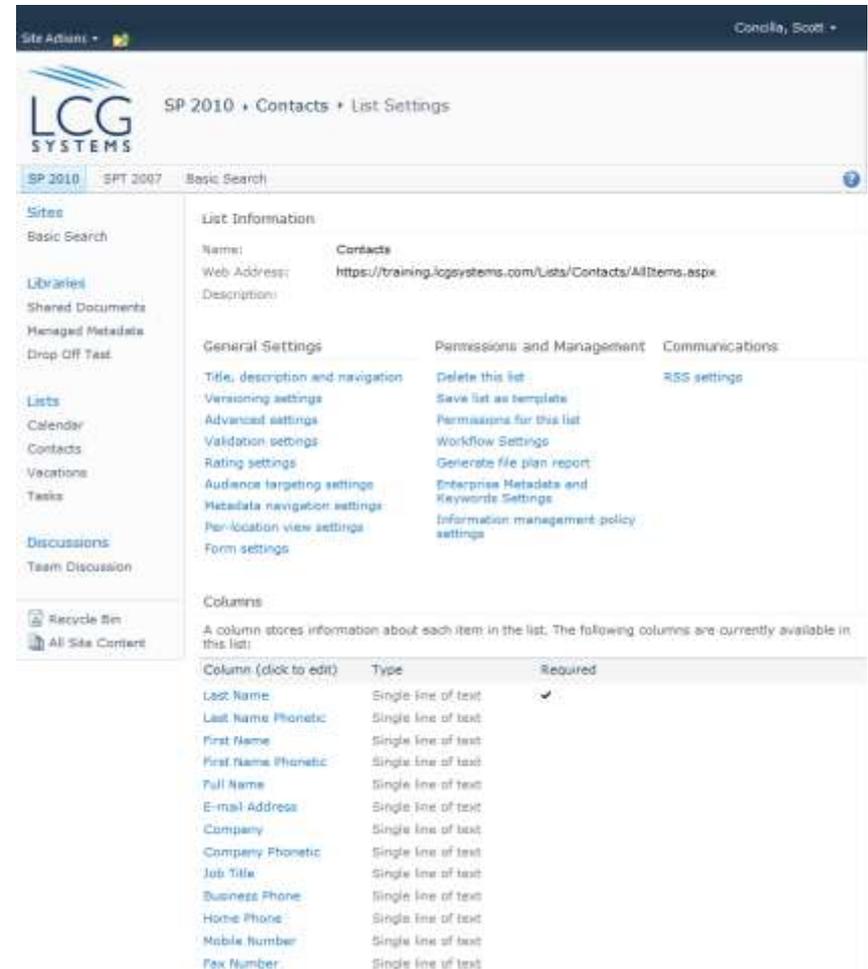
Procedure

1. On the **List** tab, in the **Settings** group, click the **List Settings** button.
2. The **List Settings** page displays.



About List Settings

- The **List Settings** page is divided into sections.
 - List Information
 - General Settings
 - Permissions and Management
 - Communications
 - Content Types
 - Columns
 - Views



The screenshot shows the SharePoint List Settings page for a 'Contacts' list. The page is divided into several sections:

- List Information:** Name: Contacts, Web Address: https://training.logsystems.com/Lists/Contacts/AllItems.aspx, Description:
- General Settings:** Title, description and navigation; Versioning settings; Advanced settings; Validation settings; Rating settings; Audience targeting settings; Metadata navigation settings; Per-location view settings; Form settings.
- Permissions and Management:** Delete this list; Save list as template; Permissions for this list; Workflow Settings; Generate file plan report; Enterprise Metadata and Keyword Settings; Information management policy settings.
- Communications:** RSS settings.
- Columns:** A column stores information about each item in the list. The following columns are currently available in this list.

Column (click to edit)	Type	Required
Last Name	Single line of text	✓
Last Name Phonetic	Single line of text	
First Name	Single line of text	
First Name Phonetic	Single line of text	
Full Name	Single line of text	
E-mail Address	Single line of text	
Company	Single line of text	
Company Phonetic	Single line of text	
Job Title	Single line of text	
Business Phone	Single line of text	
Home Phone	Single line of text	
Mobile Number	Single line of text	
Fax Number	Single line of text	

About List Settings

- Throughout today's class, we will be working with many (but not all) of the settings and options found on the **List Settings** page.



About List Settings

- For now, let's take a look at some of the options available within the **General Settings** section.
 - Title, Description, and Navigation
 - Versioning settings
 - Advanced settings



Title, Description, and Navigation

- The **Title, Description, and Navigation** page contains two basic sections.
 - Name and Description
 - Navigation



Title, Description, and Navigation

Name

- The **Name** is used on the Quick Launch Menu and the Top Link bar.

Description

- The **Description** is displayed underneath the bread crumb trail for the list, and is also displayed when viewing the All Site Content page.

Navigation

- This option determines whether the library will appear on the Quick Launch menu (on the left).

Versioning Settings

- The **Versioning Settings** page has three sections.
 - Content Approval
 - Item Version History
 - Draft Item Security



Versioning Settings

Content Approval

- Specifies whether new or changed items should remain in a draft state until they have been approved.

Item Version History

- Specifies if previous versions of an item are kept, and how many versions to keep.

Draft Item Security

- Specifies which users should be able to view draft items.

Advanced Settings

- The **Advanced Settings** page contains a variety of unrelated but more technical settings for a list.



Advanced Settings

- Each section on this page has a description of what the option controls or will change.
- Most options are “yes” or “no” choices.
- **Research and/or test an option before deploying it to users!**



Working with Columns

- About Columns
- Understanding Column Types
- Basic Column Types
- Creating a New Column
- Modifying an Existing Column
- Deleting a Column
- Changing the Field Order

About Columns

- Columns store information that is used for many purposes in SharePoint.
 - Sorting
 - Filtering
 - Grouping
 - Views
 - Calculations
 - Metadata storage



About Columns

- Column actions
 - New columns can be created.
 - The properties of existing columns can be modified.
 - Columns that aren't needed can be deleted.



Understanding Column Types

- The **column type** determines how and what kind of data can be stored in the column.
- SharePoint supports 17 different column types.
 - Not all types are available in all lists.



Basic Column Types

Single line of text

- Displays small amounts of unformatted text on a single line.

Multiple lines of text

- Displays formatted or large amounts of text on multiple lines.

Choice

- Allows choices from a list of options – uses checkboxes, radio buttons, or drop-down menus.

Number

- Used for storing numerical values used that could be used in calculations.

Date and time

- Used for storing calendar dates, or for both a date and a time.

Additional Column Type Info

- For additional information on basic column types, as well as column types not discussed here:
 - Use the instructions at the end of this presentation to access **Microsoft Office Online**.
 - Search for **Site column types and options**.



Creating a New Column

- When new information or metadata is needed in a list, a new column can be created and added to collect the information.



Creating a New Column



Procedure

1. On the **List** tab, in the **Settings** group, click the **List Settings** button.
2. On the **List Settings** page, in the **Columns** section, click **Create Column**.

Columns

A column stores information about each item in the list. Because of list settings, such as whether information is required or optional for a column, the following columns are currently available in this list:

Column (click to edit)	Type	Used
Attendees	Person or Group	
Category	Choice	Even
Check Double Booking	Check Double Booking	
Description	Multiple lines of text	Even
End Time	Date and Time	Even
Free/Busy	Free/Busy	
Location	Single line of text	Even
Resources	Resources	
Start Time	Date and Time	Even
Title	Single line of text	Even
Created By	Person or Group	
Modified By	Person or Group	

[Create column](#)

[Add from existing site columns](#)

[Indexed columns](#)



Creating a New Column



Procedure (continued)

3. Give the column a **Name** and select a **Type**.
4. The **Type** will determine the options and settings available in the **Additional Column Settings**.
5. Click **OK** when finished.

Site Actions • Concilia, Scott •

LCG SYSTEMS SP 2010 • Calendar • List Settings • Create Column
Use this page to add a column to this list.

SP 2010 SPT 2007 Basic Search

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 (checkbox box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- 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:
255

Default value:
 Text Calculated Value

Add to all content types
 Add to default view

Modifying a Column

- The properties of existing columns can be changed as needed.
- Depending on the data type, some column properties cannot be changed once a column has been created or has data.



Modifying a Column



CAUTION!!

- Use caution when making changes to columns with existing data – the changes may cause data to be lost or permanently changed.



Modifying a Column



Procedure

1. Display the **List Settings**.
2. In the **Columns** section, click the name of the column to edit.
3. Make changes as desired.
4. Click **OK** when finished.

Columns

A column stores information about each item in the list. Because of settings, such as whether information is required or optional for an item. The following columns are currently available in this list:

Column (click to edit)	Type	Used
Attendees	Person or Group	
Category	Choice	Even
Check Double Booking	Check Double Booking	
Description	Multiple lines of text	Even
End Time	Date and Time	Even
Free/Busy	Free/Busy	
Location	Single line of text	Even
Resources	Resources	
Start Time	Date and Time	Even
Title	Single line of text	Even
Created By	Person or Group	
Modified By	Person or Group	

[Create column](#)

[Add from existing site columns](#)

[Indexed columns](#)

Deleting a Column

- If a column and its data are no longer needed or wanted, the column can be deleted.



Deleting a Column



CAUTION!!

- Once a column has been deleted, the column (and any data it may have contained) is NOT recycled and it CANNOT be restored.

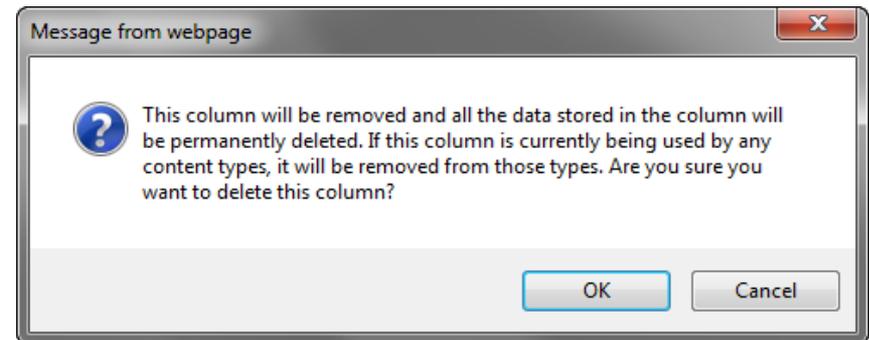


Deleting a Column



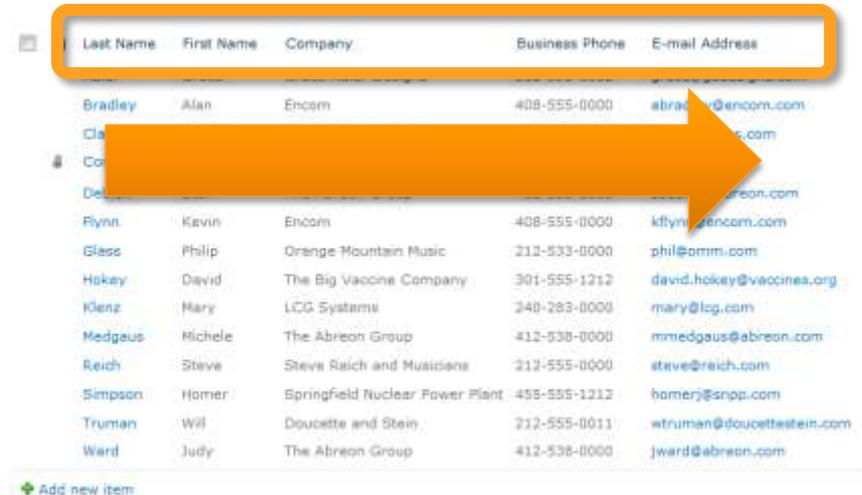
Procedure

1. Display the **List Settings**.
2. In the **Columns** section, click the name of the column to delete.
3. Scroll down and click the **Delete** button.
4. Click **OK** to acknowledge the warning and continue.



Column Order vs. Field Order

- **Column Order** is the left-to-right order of the columns when viewing a list.
- **Column Order** is determined by the settings of the current **View**.



Last Name	First Name	Company	Business Phone	E-mail Address
Bradley	Alan	Encorn	408-555-0000	abradley@encorn.com
Clark	Clayton	Encorn	408-555-0000	clayton@encorn.com
Delaney	Kevin	Encorn	408-555-0000	kdelaney@encorn.com
Rynn	Kevin	Encorn	408-555-0000	kfynn@encorn.com
Glass	Philip	Orange Mountain Music	212-533-0000	phil@omm.com
Hokey	David	The Big Vaccine Company	301-555-1212	david.hokey@vaccines.org
Klenz	Mary	LCG Systems	340-283-0000	mary@lcs.com
Medgeus	Michele	The Abreon Group	412-538-0000	mmedgeus@abreon.com
Reich	Steve	Steve Raich and Musicians	212-555-0000	steve@reich.com
Simpson	Homer	Springfield Nuclear Power Plant	455-555-1212	homerj@snp.com
Truman	Will	Doucette and Stein	212-555-0011	wtruman@doucettestein.com
Ward	Judy	The Abreon Group	412-538-0000	jward@abreon.com

[Add new item](#)

Column Order vs. Field Order

- **Field Order** is the top-to-bottom order of the fields when viewing or editing the properties.
- **Field Order** is determined by the **List Settings**.

The screenshot shows a 'Contacts - New Item' form. The ribbon is set to 'Edit' and includes buttons for Save, Cancel, Paste, Copy, Attach File, and Spelling. A list of fields is displayed on the left side of the form, including Last Name, First Name, Full Name, E-mail Address, Company, Job Title, Business Phone, Home Phone, Mobile Number, Fax Number, Address, City, State/Province, ZIP/Postal Code, Country/Region, Web Page, and Notes. A large orange arrow points downwards from the 'Last Name' field to the 'Notes' field, indicating the field order.

Changing the Field Order



Procedure

1. Display the **List Settings**.
2. In the **Columns** section, click **Column Ordering****.
3. Use the **Position from Top** drop-down menus to change the order.
4. Click **OK** when finished.

SP 2010 > Contacts > List Settings > Change Field Order

Use this page to change the order of the fields that site visitors fill out when they add items.

Field Name	Position from Top
Last Name	1
Last Name Phonetic	2
First Name	3
First Name Phonetic	4
Full Name	5
E-mail Address	6
Company	7
Company Phonetic	8
Job Title	9
Business Phone	10

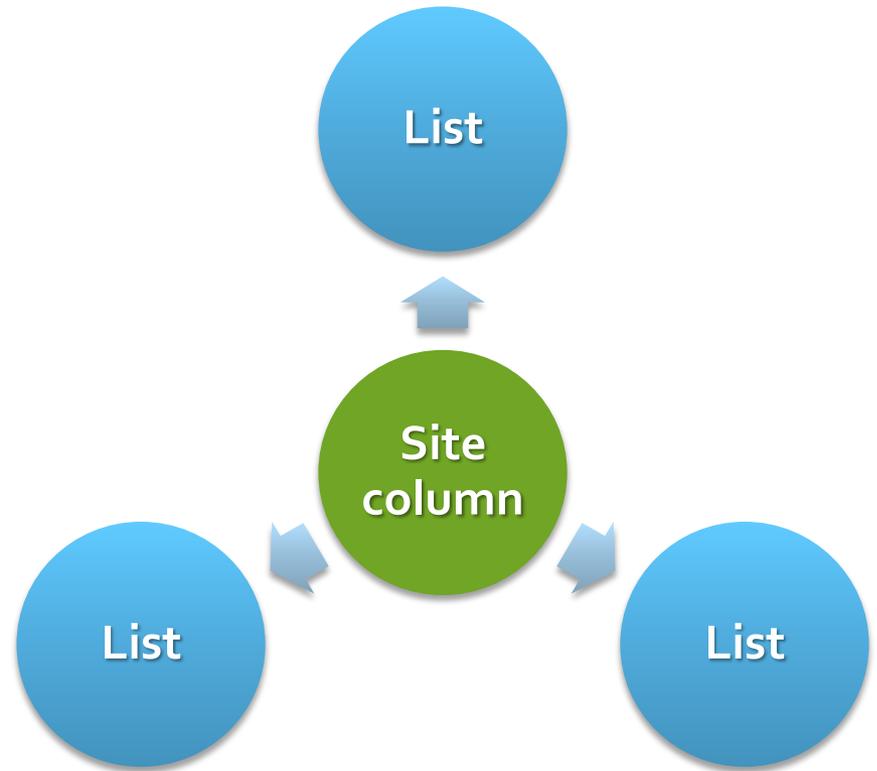
** Unfortunately, the name here is confusing. We are trying to change the **FIELD order**, but the option is called **Column Ordering**.

Working with Site Columns

- Understanding Site Columns
- Benefits of Site Columns
- Creating a Site Column
- Adding a Site Column to a List

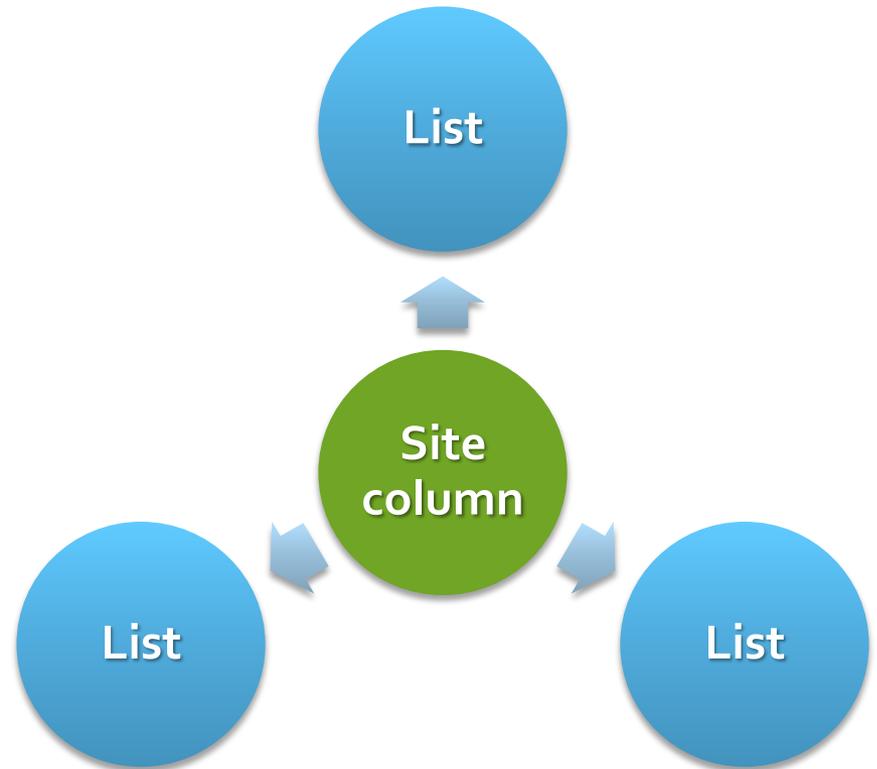
Understanding Site Columns

- **Site columns** are special columns stored at the site level instead of in a single list.
- Can be re-used throughout a site.



Benefits of Site Columns

- Create once, use multiple times.
- Consistent options or choices across sites, lists, and libraries.
- Changes made to a site column are pushed down to any place where the column is present.



Creating a Site Column

- In order to add a site column to a list, it must first be created and stored in the **Site Column Gallery**.



Creating a Site Column



Procedure

1. Select the **Site Actions** menu and choose **Site Settings**.
2. In the **Galleries** section, click **Site Columns**.
3. On the **Site Columns** page, click **Create**.

The screenshot shows the 'Site Actions' menu with the following sections:

- Users and Permissions**
 - People and groups
 - Site permissions
 - Site collection administrators
- Galleries** (highlighted with an orange arrow)
 - Site columns
 - Site content types
 - Web parts
 - List templates
 - Master pages
 - Themes
 - Solutions
- Site Administration**
 - Regional settings
 - Site libraries and lists
- Look and Feel**
 - Title, description, and icon
 - Tree view
 - Site theme
 - Navigation
- Site Actions**
 - Manage site features
 - Save site as template
 - Reset to site definition
 - Delete this site
 - Site Web Analytics reports
 - Site Collection Web Analytics reports
- Reporting Services**
 - Manage Shared Schedules

The screenshot shows the 'Site Columns' page in SharePoint. The page header includes 'Site Actions' and 'SP 2010 > Site Settings > Site Columns'. The page content includes a navigation pane on the left with 'Sites' and 'Libraries' sections. The main content area shows a table with a 'Create' button highlighted by an orange arrow.

SP 2010	SPT 2007	Basic Search
Sites		
Basic Search		
Libraries		

SP 2010 > Site Settings > Site Columns
Use this page to manage columns on this site and all parent sites.

SP 2010 SPT 2007 Basic Search

Sites

Basic Search

Libraries

Create

Site Column Type

Base Columns

Approved Only Comments Multiple lines of text

Creating a Site Column



Procedure (continued)

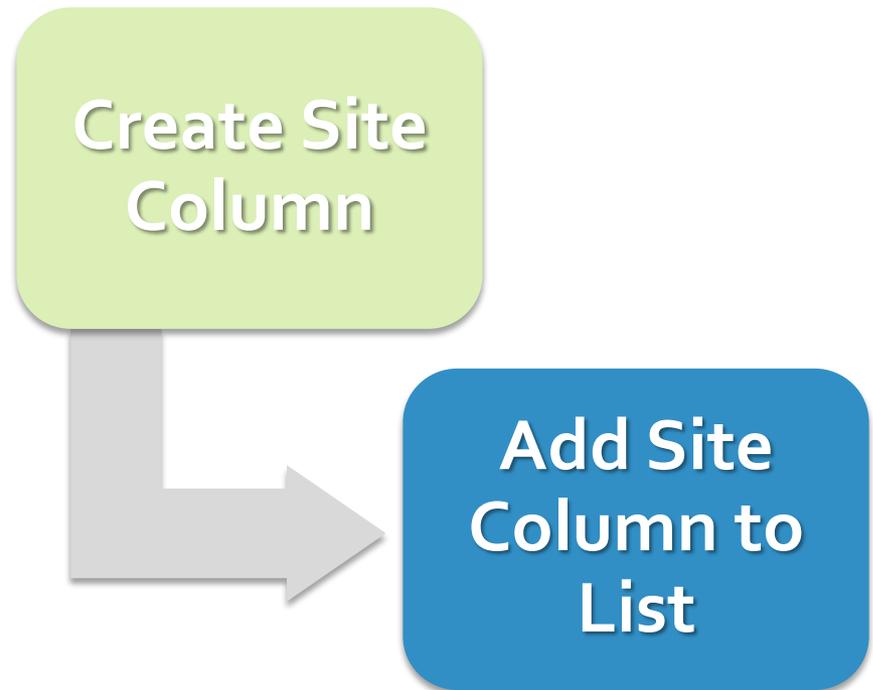
4. Name the site column and select a type.
5. Put the site column into a **Group**.
 - This is for organizational purposes of the gallery.
6. Complete any **Additional Column Settings**.
7. Click **OK** when finished.

The screenshot displays the 'New Site Column' configuration page in SharePoint 2010. The page title is 'SP 2010 • Site Settings • New Site Column'. The breadcrumb trail is 'SP 2010 • Site Settings • New Site Column'. The page content is organized into several sections:

- Name and Type:** This section contains a 'Column name' text box and a list of information types. The types include: Single line of text (selected), 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), Full HTML content with formatting and constraints for publishing, Image with formatting and constraints for publishing, Hyperlink with formatting and constraints for publishing, Summary Links data, Rich media data for publishing, and Managed Metadata.
- Group:** This section contains a 'Put this site column into:' label and two options: 'Existing group:' (selected) with a dropdown menu showing 'Custom Columns', and 'New group:' with an empty text box.
- Additional Column Settings:** This section contains a 'Description:' text box and a 'Require that this column contains information:' checkbox.

Adding a Site Column to a List

- Once a site column has been created and stored in the **Site Column Gallery**, it can be added to an existing list.



Adding a Site Column to a List



Procedure

1. Navigate to the list and access the **List Settings** page.
2. In the **Columns** section, click **Add from existing site columns**.

Columns

A column stores information about each item in the list. Because of list settings, such as whether information is required or optional for a column, the following columns are currently available in this list:

Column (click to edit)	Type	Used
Attendees	Person or Group	
Category	Choice	Even
Check Double Booking	Check Double Booking	
Description	Multiple lines of text	Even
End Time	Date and Time	Even
Free/Busy	Free/Busy	
Location	Single line of text	Even
Resources	Resources	
Start Time	Date and Time	Even
Title	Single line of text	Even
Created By	Person or Group	
Modified By	Person or Group	

[Create column](#)

[Add from existing site columns](#)

[Indexed columns](#)



Adding a Site Column to a List



Procedure (continued)

3. In the **Select Columns** section, select a group from the drop-down, locate the column name on the left, and use the **Add** button.
4. Select or unselect **Options**.
5. Click **OK** when finished.

Select Columns

Select which site columns to add to this list.

Select site columns from:
All Groups

Available site columns:

- % Complete
- Active
- Actual Work
- Address
- Aliases
- Anniversary
- Append-Only Comments
- Article Date
- Assigned To
- Assistant's Name
- Assistant's Phone

Description:
None

Group: Core Task and Issue Columns

Options

- Add to all content types
- Add to default view

OK Cancel

Validating Data

- About Validating Data
- Getting Additional Formula Help Online
- Validating Data at the List Level
- Validating Data at the Column Level

About Validating Data

- SharePoint has the ability to “validate” or “verify” data that is entered into a column or field.
- There are two types of data validation:
 - List level validation
 - Column level validation



About Validating Data

- Validation formulas must evaluate to TRUE for the validation to pass.
 - Conditional formulas
 - Logical formulas



Getting Additional Help Online

- For additional information on the proper syntax for validation formulas:
 - Use the instructions at the end of this presentation to access **Microsoft Office Online**.
 - Search for **Examples of Common Formulas** and pay particular attention to the section on **Conditional formulas**.



Validating Data – List Level

- Data validation at the **list level** allows you to check one column against another.
 - [ColumnA]>[ColumnB]
- There can only be one validation rule at the list level.



Validating Data – List Level



Procedure

1. Display the **List Settings**.
2. In the **General Settings** section, click **Validation settings**.
3. Build a **Formula**.
4. Enter a **User Message**.
5. Click **Save** when finished.

Site Actions • Condalia, Scott •

LCG SYSTEMS SP 2010 • Contacts • List Settings • Validation Settings

SP 2010 SPT 2007 Basic Search

Formula

Specify the formula you want to use to validate the data in this column when new items are saved to this list. To pass validation, the formula must evaluate to TRUE. For more information, see Formulas in Help.

Example: =[Discount]<[Cost] will only pass validation if column Discount is less than column Cost.

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

User Message

Type descriptive text that will help site visitors understand what is needed for a valid list item. This description will be shown if the validation expression fails.

Formula: Insert Column:

- Business Phone
- City
- Company
- Country/Region
- Created
- E-mail Address
- Fax Number
- First Name
- Full Name
- Home Phone

[Add to formula](#)

Save Cancel

Validating Data – Column Level

- Data validation at the **column level** allows you to check **ONLY** the current column.
- Every column in a list can have one validation rule.



Validating Data – Column Level

- Column validation can only be used on the following column types:
 - Single line of text
 - Choice (single only)
 - Number
 - Currency
 - Date & Time



Validating Data – Column Level



Procedure

1. Display the **List Settings**.
2. Select a column name to edit.
3. Expand the **Column Validation** section.
4. Build a **Formula**.
5. Enter a **User Message**.
6. Click **OK** when finished.

Enforce unique values:
 Yes No

Type each choice on a separate line:
Information Technology
Human Resources
Marketing
Business Development

Display choices using:
 Drop-Down Menu
 Radio Buttons
 Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:
 Yes No

Default value:
 Choice Calculated Value

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:
The value that you have entered is not valid.

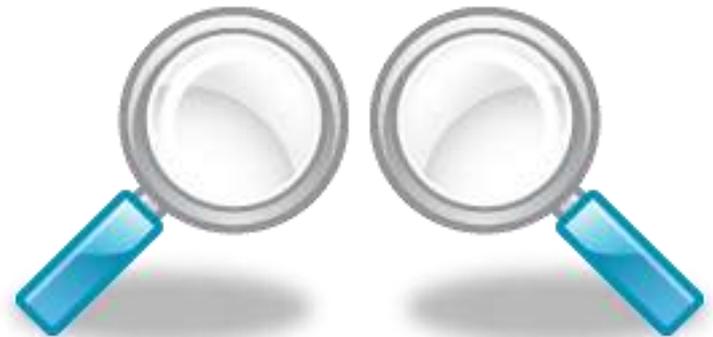
Buttons: Delete, OK, Cancel

Working with Views

- About Views
- Types of Views
- Views and Permissions
- Creating a New View
- Setting View Options
- Modifying a Current View
- Setting a Default View
- Customizing Available Views

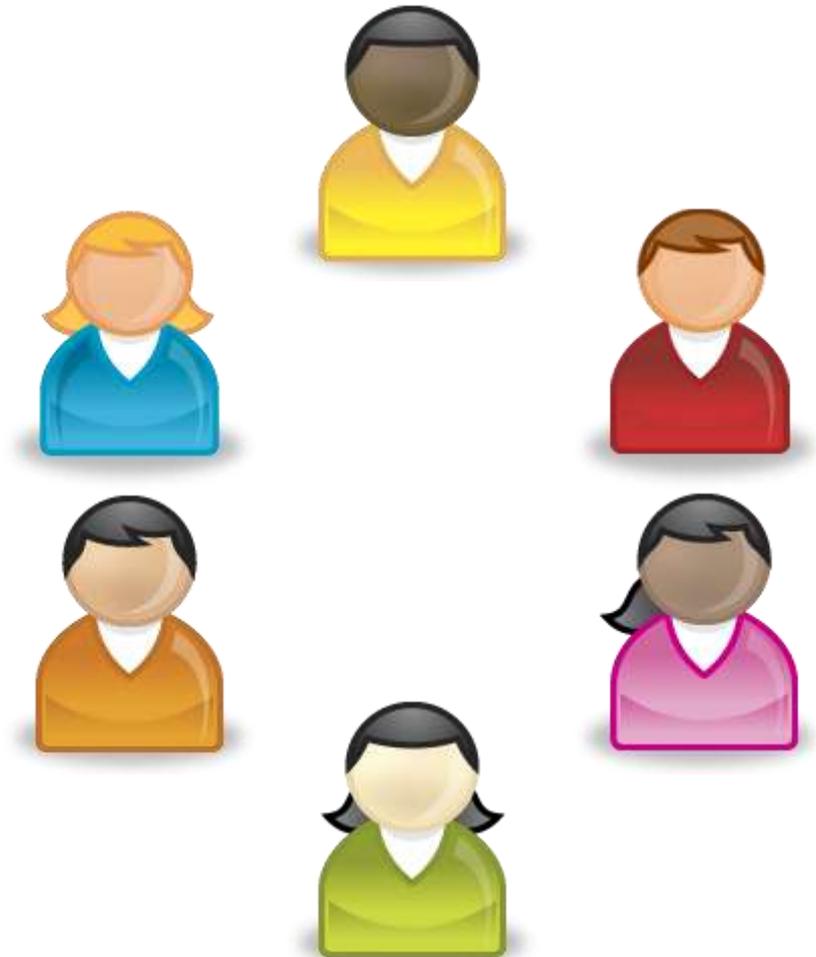
About Views

- A **View** is a collection of settings that determines how the items in a list will be displayed.
- Views are found at the end of the breadcrumb trail and in the **Manage Views** group.



Types of Views

- Public View
 - Can be created by anyone with sufficient rights to create views.
 - Usually a list owner and/or a site owner.
 - A public view is available to all users of the list.



Types of Views

- Personal View
 - Anyone can create a personal view.
 - A personal view is only available to the person who created the view.



Views and Permissions

- The ability to create and modify views is a permission that can be granted to users.
 - The individual permission is called **Manage Lists**.
 - The **Design** and **Full Control** permission levels include this permission.



Views and Permissions

- Views cannot be permission-based.
 - A view is either **Public** (for everyone) or **Personal** (for the user that created it).
 - Cannot have a view that only “certain people or groups” can use.



Creating a New View

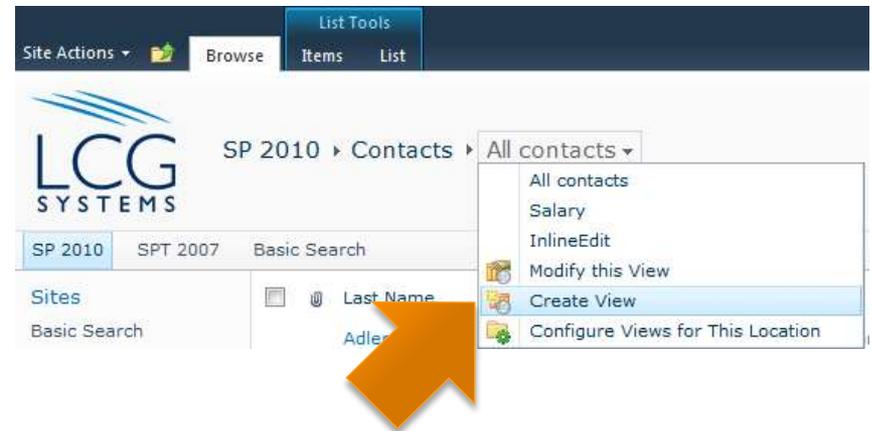
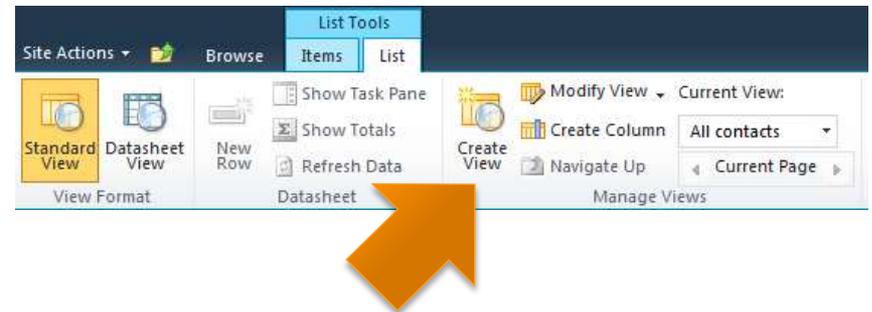


Procedure

1. On the **List** tab, in the **Manage Views** group, click the **Create View** button.

OR

Click the view link at the end of the breadcrumb trail and select **Create View**.



Creating a New View



Procedure (continued)

2. To create a view “from scratch”, select an option in the **Choose a view format** section.

OR

To base a new view off of a current view, select a view in the **Start from an existing view** section.

Site Actions + Concilia, Scott +

SP 2010 > Contacts > List Settings > Create View
Use this page to select the type of view you want to create for your data.

SP 2010 SPT 2007 Basic Search

Choose a view format

- Standard View**
View data on a Web page. You can choose from a list of display styles.
- Datasheet View**
View data in an editable spreadsheet format that is convenient for bulk editing and quick customization.
- Calendar View**
View data as a daily, weekly, or monthly calendar.
- Access View**
Start Microsoft Access to create forms and reports that are based on this list.
- Gantt View**
View list items in a Gantt chart to see a graphical representation of how a team's tasks relate over time.
- Custom View in SharePoint Designer**
Start SharePoint Designer to create a new view for this list with capabilities such as conditional formatting.

Start from an existing view

- All contacts
- Inherited
- Salary

Creating a New View



Procedure (continued)

3. Give the view a **Name**.
4. Select an **Audience** for the view.
5. Select the desired options for the view. (See the following slides for more information.)
6. Click **OK** when finished.

SP 2010 > Contacts > List Settings > Create View
Use this page to create a view of this list.

SP 2010 SPT 2007 Basic Search

Name
Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click the link.

Audience
Select the option that represents the intended audience for the view.

Columns
Select or clear the check box next to each column you want to show or hide in this view of the page. To specify the order of the columns, select a number in the **Position from left** box.

View Name:

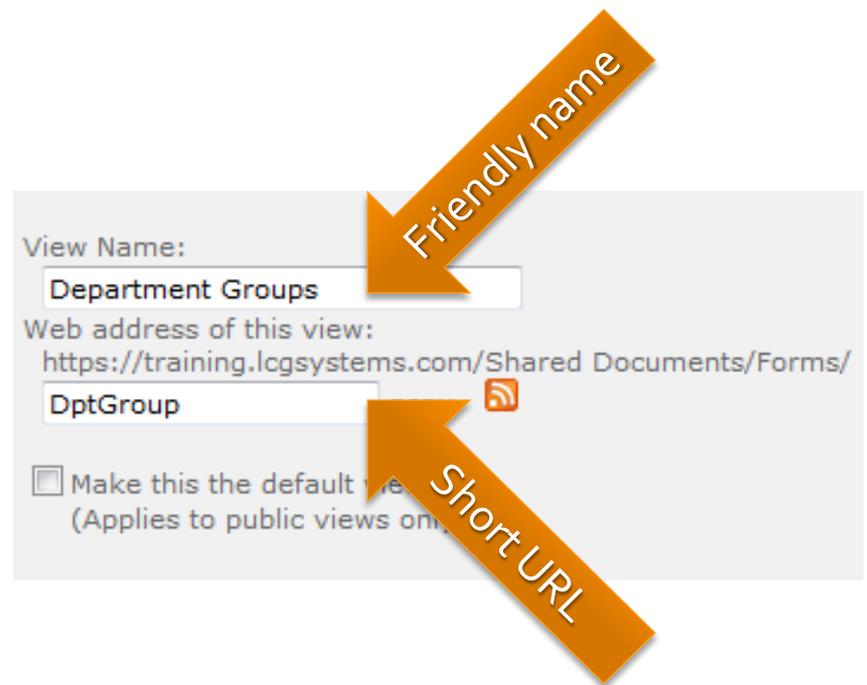
Make this the default view (Applies to public views only)

View Audience:
 Create a Personal View
Personal views are intended for your use only.
 Create a Public View
Public views can be visited by anyone using the site.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Attachments	1
<input checked="" type="checkbox"/>	Last Name (linked to item with edit menu)	2
<input checked="" type="checkbox"/>	First Name	3
<input checked="" type="checkbox"/>	Company	4
<input checked="" type="checkbox"/>	Business Phone	5
<input checked="" type="checkbox"/>	Home Phone	6
<input checked="" type="checkbox"/>	E-mail Address	7
<input type="checkbox"/>	Address	8
<input type="checkbox"/>	City	9
<input type="checkbox"/>	Company Phonetic	10
<input type="checkbox"/>	Calendar Type	11
<input type="checkbox"/>	Country/Region	12
<input type="checkbox"/>	Created	13
<input type="checkbox"/>	Created By	14
<input type="checkbox"/>	Edit (link to edit item)	15
<input type="checkbox"/>	Fax Number	16
<input type="checkbox"/>	First Name Phonetic	17

View Options – Name

- When giving a view a **Name**, give it a short-yet-friendly name first.
- After creating and saving the view, go back and change the URL to be shorter.
- A short view name helps with the 255-character URL limit.



View Options – Audience

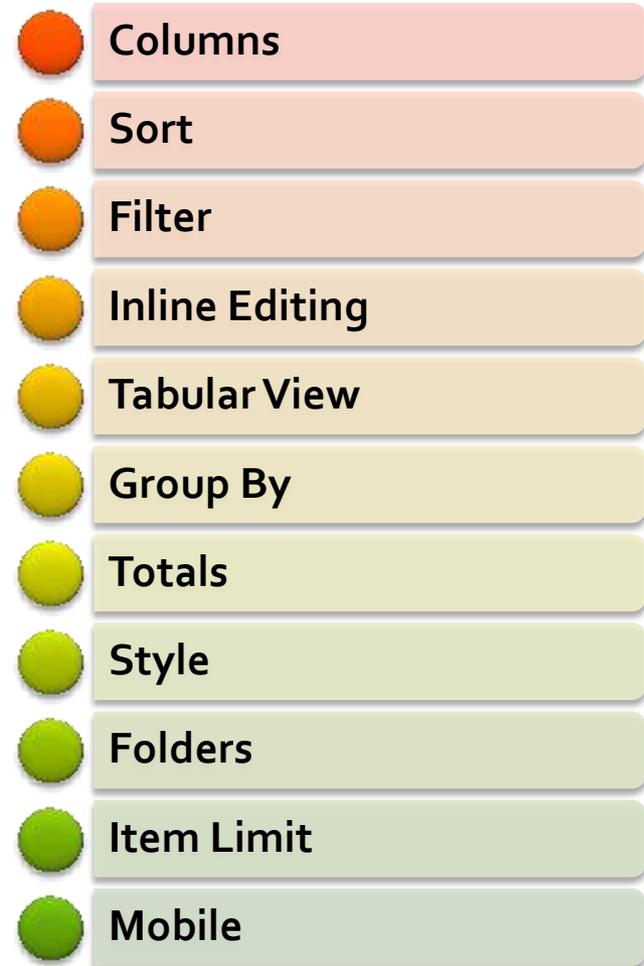
- The **Audience** section determines whether the view is a Public view or Personal view.
- This option **CANNOT** be changed or switched after the view has been saved.

View Audience:

- Create a Personal View
Personal views are intended for your use only.
- Create a Public View
Public views can be visited by anyone using the site.

View Options – Other

- After **Name** and **Audience**, there are 11 other option areas available for a view.
- Click the plus sign [+]
next to each area name to expand it and read an explanation of what the option is and can do.



Modifying a Current View



Procedure

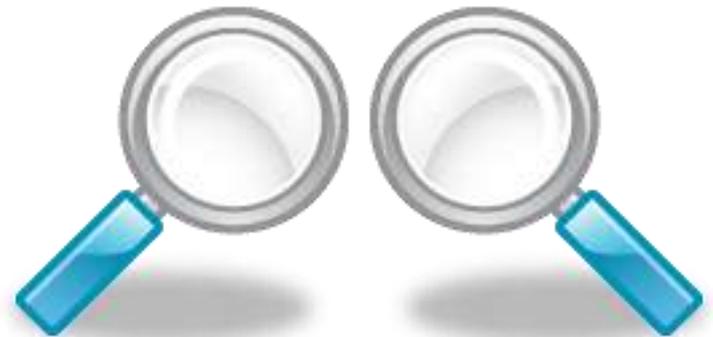
1. Change the list view to the view you wish to modify.
2. Click the view drop-down at the end of the bread crumb trail and choose **Modify this View**.
3. Make the desired changes and click **OK**.

The screenshot shows a SharePoint interface for 'SP 2010 > Contacts'. The breadcrumb trail is 'SP 2010 > Contacts > All contacts'. A dropdown menu is open, showing options: 'All contacts', 'Salary', 'InlineEdit', 'Modify this View', 'Create View', and 'Configure Views for This Location'. An orange arrow points to the 'Modify this View' option. The main content area displays a table of contacts with columns for Last Name, First Name, and Company.

Last Name	First Name	Company
Adler	G	
Bradley	Alan	Encom
Claus	Santa	Holiday Presents Inc.
Concilla	Scott	LCG Systems
Debick	Stan	The Abreon Group
Flynn	Kevin	Encom
Glass	Philip	Orange Mountain Music
Hokey	David	The Big Global Vaccine Company
Klenz	Mary	LCG Systems
Medgaus	Michele	The Abreon Group
Reich	Steve	Steve Reich and Musicians
Simpson	Homer	Springfield Nuclear Power Plant
Truman	Will	Doucette and Stein
Ward	Judy	The Abreon Group

Setting a Default View

- Any **Public** view can be the default view for a list.
 - Personal views cannot be default views.
- This option can be set when a view is created, or altered later.



Setting a Default View



Procedure

1. Either create a new view or modify a current view.
2. In the **Name** section, select the **Make this the default view** check box.
NOTE: If the view is already the default, the checkbox will not be available.
3. Click **OK**.

The screenshot shows the 'Edit View' page for a 'Contacts' list in SharePoint 2010. The breadcrumb path is 'SP 2010 > Contacts > List Settings > Edit View'. The page title is 'SP 2010 > Contacts > List Settings > Edit View'. The main content area is divided into sections: 'Name', 'Columns', and 'Display'. The 'Name' section has a 'Name' field and a 'View Name' field. The 'Columns' section has a 'Columns' section with a list of columns to be displayed. The 'Display' section has a table of columns to be displayed. An orange arrow points to the 'Make this the default view' checkbox, which is checked.

Display	Column Name
<input checked="" type="checkbox"/>	Attachments
<input checked="" type="checkbox"/>	Last Name (linked to item with edit menu)
<input checked="" type="checkbox"/>	First Name
<input checked="" type="checkbox"/>	Company
<input checked="" type="checkbox"/>	Business Phone
<input checked="" type="checkbox"/>	Home Phone
<input checked="" type="checkbox"/>	E-mail Address
<input type="checkbox"/>	Address
<input type="checkbox"/>	City
<input type="checkbox"/>	Company Phonetic
<input type="checkbox"/>	Content Type
<input type="checkbox"/>	Country/Region
<input type="checkbox"/>	Created
<input type="checkbox"/>	Created By
<input type="checkbox"/>	Edit (link to edit item)
<input type="checkbox"/>	Phone Number

Customizing Available Views

- This option/setting determines if the views available in a folder are unique or inherited from the parent.
- Does not work for personal views.



Customizing Available Views



Procedure

1. Display the **List Settings**.
2. In the **General Settings** category, click **Per-location view settings**.

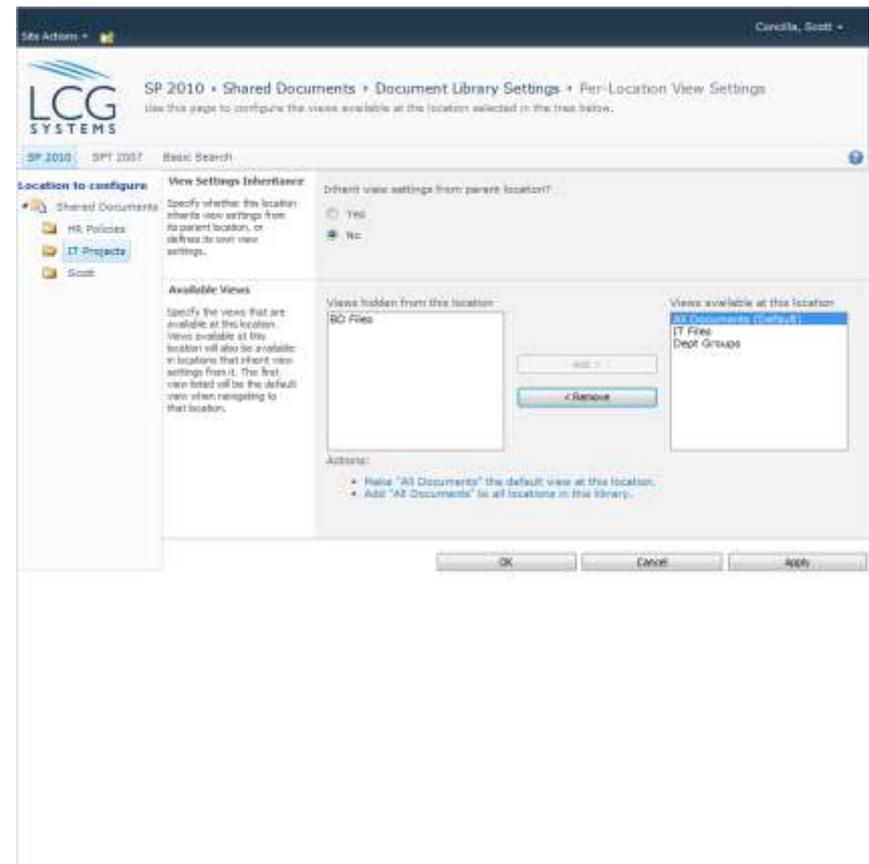
The screenshot shows the LCG Systems web interface. At the top, there is a dark blue header with 'Site Actions' and a folder icon. Below this is the LCG SYSTEMS logo and the breadcrumb 'SP 2010 > Tasks > List Settings'. A navigation bar contains 'SP 2010', 'SPT 2007', and 'Basic Search'. The main content area is divided into two columns. The left column has a 'Sites' section with 'Basic Search', a 'Libraries' section with 'Shared Documents', 'Managed Metadata', and 'Drop Off Test', a 'Lists' section with 'Calendar', 'Contacts', 'Vacations', and 'Tasks', and a 'Discussions' section with 'Team Discussion'. The right column is titled 'List Information' and contains 'Name: Tasks', 'Web Address: https://training.lcgsystems.com/List', and 'Description: Use the Tasks list to keep track of w'. Below this is a table with two columns: 'General Settings' and 'Permissions an'. The 'General Settings' column lists 'Title, description and navigation', 'Versioning settings', 'Advanced settings', 'Validation settings', 'Rating settings', 'Audience targeting settings', 'Metadata navigation settings', 'Per-location view settings', and 'Form settings'. The 'Permissions an' column lists 'Delete this list', 'Save list as tem', 'Permissions for l', 'Workflow Setting', 'Generate file pla', 'Enterprise Metac', 'Keywords Settin', and 'Information mar'. An orange arrow points to the 'Per-location view settings' link in the 'General Settings' column.

Customizing Available Views



Procedure (continued)

3. In the **Location to configure** pane on the left, select a folder.
4. In the **View Settings Inheritance** section, select **No**.
5. Use the **Available Views** section to **Add** and **Remove** views.
6. Click **OK** to save.



Managing a List

- Saving a List as a Template
- Deleting a List
- Restoring a List

Saving a List as a Template

- The settings and configuration of a list can be saved as a template to shorten the creation of future, similar lists.
 - This is the fourth “list creation option” that was discussed earlier.



Saving a List as a Template

- Templates can also include content, however, item security and permissions are not maintained in the template.



Saving a List as a Template



Procedure

1. Display the **List Settings**.
2. In the **Permissions and Management** section, click **Save list as template**.
3. Fill out the information and options.
4. Click **OK** to save the template.

The screenshot shows the 'Save as Template' dialog in SharePoint. The title bar indicates the user is Concilia, Scott. The breadcrumb path is 'SP 2010 - Site Settings - Save as Template'. The main heading is 'SP 2010 - Site Settings - Save as Template' with a sub-heading 'Use this page to save your list as a template. Users can create new lists from this template.' The dialog is divided into several sections: 'File Name' with a text input field; 'Name and Description' with 'Template name:' and 'Template description:' fields; and 'Include Content' with a checkbox. A 'Caution' message is present: 'Caution: Item security is not maintained in a template. If you have private content in this list, enabling this option is not recommended.' At the bottom right, there are 'OK' and 'Cancel' buttons.

Deleting a List

- If a list is no longer needed or wanted, it can be deleted from the site.
- Deleting a list will also delete all content within the list.



Deleting a List



Procedure

1. Display the **List Settings**.
2. In the **Permissions and Management** section, click **Delete this list**.
3. Click **OK** to confirm or **Cancel** to abort.

Site Actions ▾

LCG SYSTEMS

SP 2010 ▸ Links ▸ List Settings

SP 2010 SPT 2007 Basic Search

Sites
Basic Search

Libraries
Shared Documents
Managed Metadata
Drop Off Test

Lists
Calendar
Tasks
Contacts
Vacations
Status List

Discussions
Team Discussion

Recycle Bin
All Site Content

List Information
Name: Links
Web Address: <https://training.lcgsystems.com/Lists/Links/AllItems.aspx>
Description: Use the Links list for links to Web pages that your team r useful.

General Settings
[Title, description and navigation](#)
[Versioning settings](#)
[Advanced settings](#)
[Validation settings](#)
[Rating settings](#)
[Audience targeting settings](#)
[Metadata navigation settings](#)
[Per-location view settings](#)
[Form settings](#)

Permissions and Management
[Delete this list](#)
[Save list as template](#)
[Permissions for this list](#)
[Workflow Settings](#)
[Generate file plan report](#)
[Enterprise Metadata and Keywords Settings](#)
[Information management policy settings](#)

Columns
A column stores information about each item in the list. The following co this list:

Column (click to edit)	Type	Required
URL	Hyperlink or Picture	✓
Notes	Multiple lines of text	

Restoring a List

- Lists that have been deleted (either intentionally or accidentally) can be restored to the site.



Restoring a List

- If the list you wish to restore is not in the Site Recycle Bin, first check to make sure you are viewing the correct Site Recycle Bin
 - Every site maintains its own Recycle Bin.



Restoring a List

- If you are still unable to locate the list, you will need to contact your **Site Collection Administrator** and ask them to check the **Site Collection Recycle Bin**.



Restoring a List



Procedure

1. On the Quick Launch menu, select the **Recycle Bin** for the site.
2. Select the check box next to the list to be restored.
3. Click **Restore Selection**.
4. Click **OK** to confirm.

Site Actions ▾

SP 2010 ▸ Recycle Bin

Use this page to restore items that you have deleted from were deleted more than 30 day(s) ago will be automaticall Site Collection go to the Site Collection Recycle Bin.

SP 2010 SPT 2007 Basic Search Sites

Restore Selection X Delete Selection

<input type="checkbox"/>	Type	Name	Original Location
<input checked="" type="checkbox"/>		Tasks	/Lists
<input type="checkbox"/>		Status List	/Lists
<input type="checkbox"/>		Used Book Sale	/Lists/Announcements
<input type="checkbox"/>		SharePoint Training Today	/Lists/Announcements
<input type="checkbox"/>		Staff Meeting TODAY at 2pm	/Lists/Announcements
<input type="checkbox"/>		Angelina	/Lists/Contacts
<input type="checkbox"/>		Kors	/Lists/Contacts
<input type="checkbox"/>		Throckmorton	/Lists/Contacts
<input type="checkbox"/>		Woodstock	/Lists/Contacts

Restoring a List

- If the list that was deleted and then restored was originally listed on the site Quick Launch menu, it is not automatically added back to the Quick Launch menu when restored.

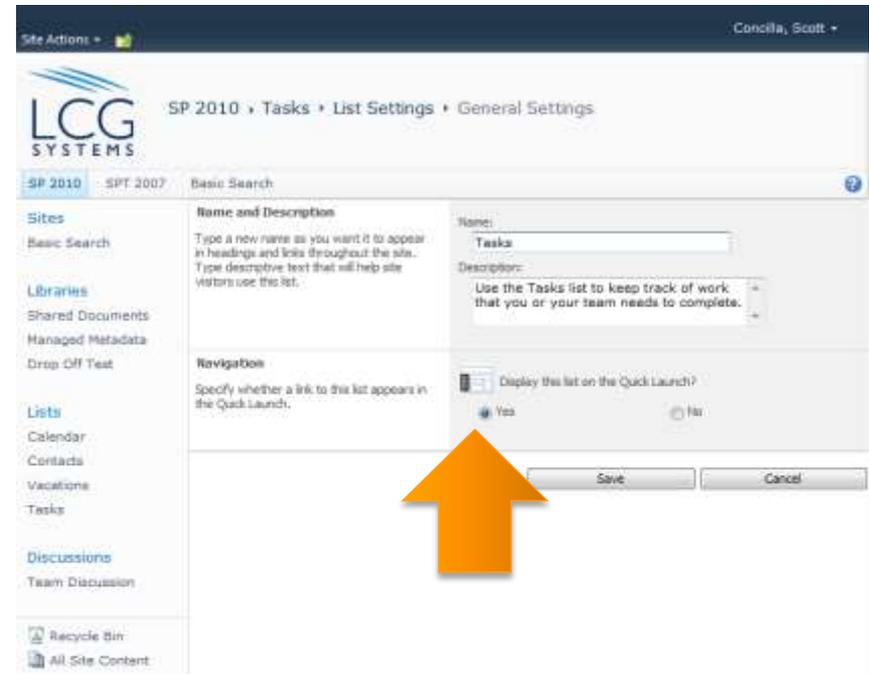


Restoring a List



Procedure

1. Display the **List Settings**.
2. In the **General Settings** section, click **Title**, **description**, and **navigation**.
3. In the **Navigation** section, choose **Yes**.
4. Click **Save** when finished.



Additional Help

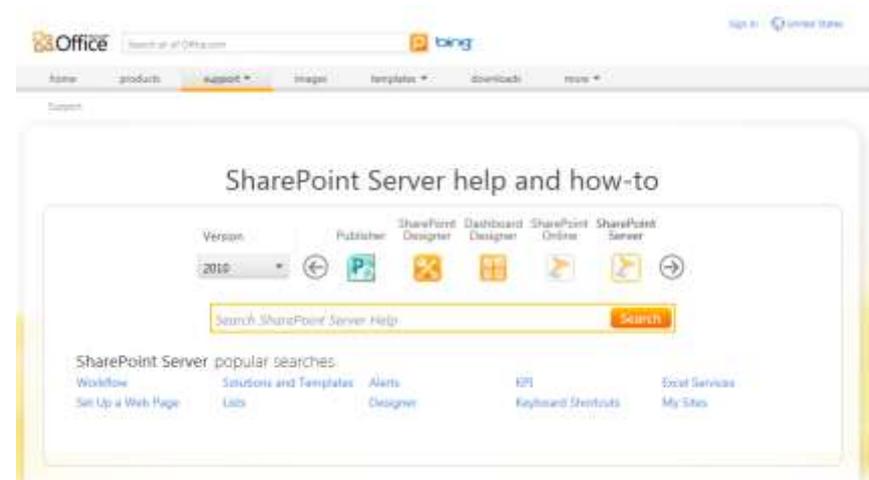
- Microsoft Office Online
- Recommended Books

Microsoft Office Online



office.microsoft.com

1. Select the **Support** menu and choose **All Support**.
2. Make sure the **Version** drop-down displays **2010**.
3. Use right arrow to scroll and select the **SharePoint Server** icon.



Recommended Books

- **SharePoint 2010 Plain & Simple**
 - J. Lightfoot and C. Beckett
 - Microsoft Press
- **The SharePoint Shepherd's Guide for End Users**
 - Robert Bogue
- **SharePoint 2010 User's Guide**
 - S. Bates and T. Smith
 - Apress
- **SharePoint Foundation 2010**
 - O. Londer and P. Coventry
 - Microsoft Press

