

SharePoint Instruction Guide

Instructions for Creating a Custom List

Everything in SharePoint is essentially a list. Whether it is a document library, calendar, announcements, task list or a custom created list, it has many of the same fundamentals. This document will cover the creation of an out of the box list (such as a calendar), a custom list, setting up the security on a list (Appendix A), setting up views on a list (Appendix B) and using lists on pages (Appendix C).

You must have the appropriate level of permissions assigned to create a list. Additionally a list should be created with a thoughtful process mapped out of what the list will accomplish.

Any questions can be directed to Kathie Glassel, (717)526-1010 x 3353 or kglassel@pacounties.org.

CREATING A STANDARD LIST

This process is quite easy to follow and is the same no matter what type of list you would like to create. In this example, you are creating a calendar.

- First thing to know is if you have a main site with many subsites, whatever site you are on is where the list gets created!!
- If a list is on a subsite, the best way to get that information to appropriately show on other sites is to use a content query web part (instructions not included on this document.)

1. Sign into the website.
2. Go to the department where the list will be created.
3. Once on the site where the list should reside, click on **Site Actions** and select **View All Site Content**.



Figure 1

4. On the **View All Site Content** window, click **Create**.



Figure 2

5. In this example we are selecting a **Calendar**, under the **Tracking** column.



Figure 3

6. This will bring up the same window no matter why type of “out of the box” list.

A screenshot of the 'Create List' dialog box in SharePoint. The dialog box is light blue and contains the following fields and options: 'Name:' with a text box containing 'TestCalendar'; 'Description:' with a text area; 'Display this list on the Quick Launch?' with radio buttons for 'Yes' and 'No' (selected); 'Allow this list to receive e-mail?' with radio buttons for 'Yes' and 'No' (selected); and 'E-mail address:' with a text box containing '@pacounties.org'. At the bottom, there are 'Create' and 'Cancel' buttons.

Figure 4

7. Name your list (short names are best).

8. You may put in a description if desired (optional).

9. Select **No** for the Display on Quick Launch (which is the left navigation).

10. Select **No** to no receive e-mail requests.

11. Click **Create**.

This completes the list creation. To set up other columns (Figure 13) or security (Appendix A) or views (Appendix B) use the following instructions for custom lists.

CREATING A CUSTOM LIST

1. Sign in to the website.
2. Go to the department where the form (custom list) will be created (in this example we are creating a "Petition Request" list under an Elections and Voter Registration office.) Once on the site where the list should reside, click on **Site Actions** and select **View All Site Content**.



Figure 5

3. On the **View All Site Content** window, click **Create**



Figure 6

4. Under **Custom Lists**, click on **Custom List**



Figure 7

5. Name the List (nothing lengthy), select **No** for the **Display on Quick Launch?**
6. Click **Create**
7. This opens up the custom list.
8. Click on **Settings** and select **List Settings**



Figure 8

9. This opens up the **List Settings** window of the list. On this window you can change various settings on the list as described below for each item under **General Settings**, **Permissions and Management** and **Communications**.

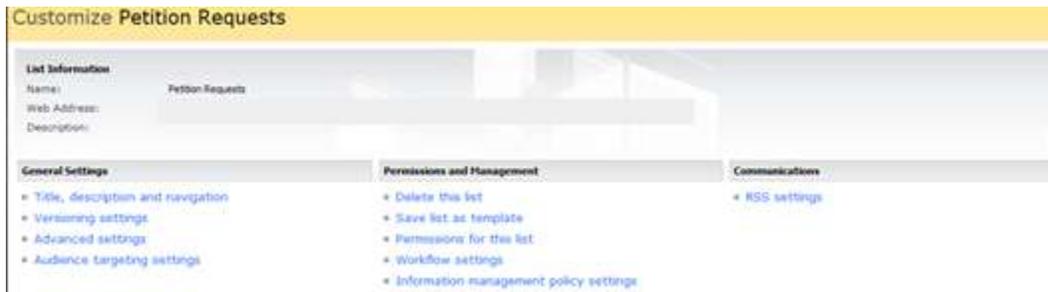


Figure 9

10. Items and their purpose AND recommended items to pay attention to:

NOTE: Things like security can be BY LIST, so it is important for one to decide how the list (forms) are going to be used, and by who and what is done with the data once it is entered!

GENERAL SETTINGS

- **Title, Description and navigation** = Change the title, description or whether it appears on the quick launch (note have not seen where it takes it off it you already selected yes!)
- **Versioning** = unless there is a reason driving versioning, this would normally not be put on a list. It would be beneficial to have it on the Pages and Document libraries.
- **Advanced settings** = this is where you can turn on content approval **and** set up how the entry will work. For example:
 - Do you want a user to be able to read all items or just their own?
 - Would you want them to be able to edit only their own items?
- **Audience targeting settings** = you can target a list to a group (however, it would be best to do this through navigation)

PERMISSIONS AND MANAGEMENT

- **Delete this list** = Do you want to delete a list?
- **Save list as a template** = Do you want to keep this as a base to start other lists?
- **Permissions for this list** = this is where you can set permissions for a list. For setting up security see **Appendix A**.
- **Workflow** = this is where you can set up the approval process (among other processes). (Workflow can also be developed in SharePoint Designer or Visual Studio)
- **Information Settings** = this is where policies can be applied to the list / document library.

COMMUNICATIONS

- **RSS** = this is where you can designate whether an RSS feed should exist or not.

11. Once you get the administration of the list setup, you then have to create the columns that will be used to collect the data. To do these continue with step 13.

12. On this same **List Settings** window you will see an area for columns. This is where you define your fields. There is typically a set number that are "system generated" when you create a list. You CAN remove or hide these. (If you need to do so, please request a quick instruction sheet on how to do so.)



Figure 10

13. You can rename the title column (or any column if needed).

14. To rename a column just click on the column name and type in the new name.



Figure 11



Figure 12

15. On that same screen you can specify whether a column (field) must contain information.

16. Once you make your change click **Ok**.

- Now you need to create all the other columns that will hold information.
- You can set up views on these columns by setting up filters or groups, etc. (See **Appendix B**.)

17. Click on **Create Column**



Figure 13

18. Type the column name

19. Select what type of information will be contained in that column

20. Select whether it is a required field

Note: Depending upon what type of field format you select it may require you to remove the 'default' selection (for example if you select a drop down choice menu it will default to the first choice item as the default.)

21. Click **OK**

22. Continue to make all the columns for the form/field data.

NOTE: You can make information consistent by using the format of **Choice** which provides a dropdown selection for the user. Note in this example: State is the column name (which is not visible on the screen print) but I copied / pasted a list from the internet into the "choice box" and put the default as PENNSYLVANIA.

Additional Column Settings
Specify detailed options for the type of information you selected.

Choice (Items to choose from)
 Number (1, 1.1, 10)
 Currency (\$, €, £)
 Date and Time

Description:
[Empty text field]

Require that this column contains information:
 Yes No

Type each choice on a separate line:
[List box containing: ALABAMA, ALASKA, AMERICAN SAMOA, ARIZONA]

Display choice using:
 Drop-Down Menu
 Radio Buttons
 Checklist (after multiple selections)

Allow "None" choice:
 Yes No

Default value:
 Choice Calculated Value
PENNSYLVANIA

[Delete] [OK] [Cancel]

Figure 14

23. Once you have all your columns created you will see the type, requirements, etc.

Column (Site Field)	Type	Required
First Name	Single line of text	✓
Last Name	Single line of text	✓
Address	Single line of text	✓
City	Single line of text	✓
State	Choice	
Zip	Single line of text	✓
Phone	Single line of text	
Email Address	Single line of text	
County Wide Rebbon?	Choice	
Local Borough/Township Rebbon?	Choice	
Pick your School District and Region	Choice	
How many Rebbons?	Choice	
Created By	Person or Group	
Modified By	Person or Group	

Figure 15

24. If you entered them in a different order that you want them displayed you can "reorder your columns.

25. Select **Column Ordering**

Modified By: Person or Group

- Create column
- Add from existing site columns
- Column ordering
- Indexed columns

Figure 16

26. Select the column you order you want. When you move a column to 1, all other columns will automatically move down one.



Figure 17

27. Once you are done reordering, just click **OK**.
28. If you need to create views on a list you may also do so from this window! (See **Appendix B.**)
29. Now your list and the form to that list are complete. The **"All Items"** view of the list is displayed when you go to the list.



Figure 18

30. To see the form that the user will use to enter, click on **New**. This opens the "out of the box" form.

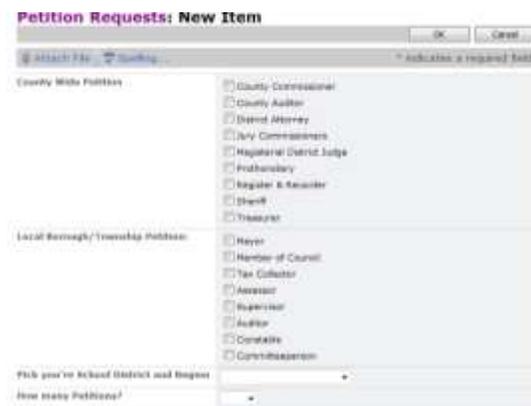


Figure 19

- If you want to customize this form you need to do this in a design type software application, such as SharePoint Designer. Instructions for SharePoint Designer are listed on another instructional guide.

Appendix A

Lists can have their own security, separate and apart from the site (or subsite) that it resides within. The purpose of the list will drive the permissions set upon the list. The default setting is that a list will **inherit** the security from the site where it resides. (So if a list is on the main site, the security settings will reflect what is on the main site.)

Keep in mind EVERYTHING in SharePoint is a list. Whether it be a custom list, calendar, task list, announcements or document library. They are all **lists!**

A CALENDAR EXAMPLE

Agency X has an agency calendar to where all activities and events are listed. However, on this one calendar (list) there are multiple departments who want their information posted on this calendar. In this scenario, the following would be setup.

FUCNTIONAL NEEDS IDENTIFIED

- Several departments within agency X need to post to the calendar.
- No person should be able to change (edit/delete) any other person's / departments events.
- Each department wants their own events displayed on their sites.
- Agency X wants all agency activities showing on main calendar.

LOCATION OF LIST ON SHAREPOINT SITE

Agency X Calendar is located on main site so all can access.

ADMIN TASKS

1. Ensure a group exists for each department that will have a person manage the calendar.
2. Make sure that each of those groups have read/restricted read permissions on main site
3. Add users to the appropriate group
4. Go to the list administrative settings and edit the permissions
5. Add a column to the calendar for *Departments* (type of column would be **Choice**)
6. Change the group(s) permissions to **Contribute**.
7. Test functionality /Implement

PERMISSIONS ON LIST

- Agency X Admin – Full Control
- Dept Groups – Contribute
- Other defaults picked up from main site permission levels

SETTING UP SECURITY ON A LIST

- If you need special permissions on a list or library, you can BREAK the inheritance by:
1. Login to the website (or if you are in the midst of creating a list you may use these instructions starting with .)
 2. Go to the list where you need to apply specific permissions
 3. Click on **Settings**, select **List Settings**.



Figure 20

4. On the settings screen select **Permissions for this list.**

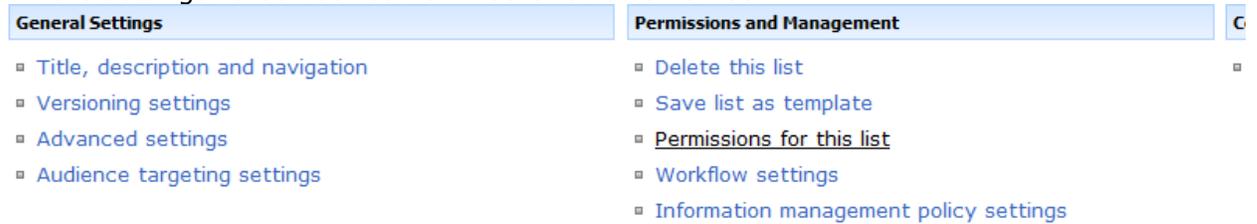


Figure 21

5. Click on **Actions** -> Select **Edit Permissions**



Figure 22

- This will pop up a warning Window stating "You are about to create unique permissions....."

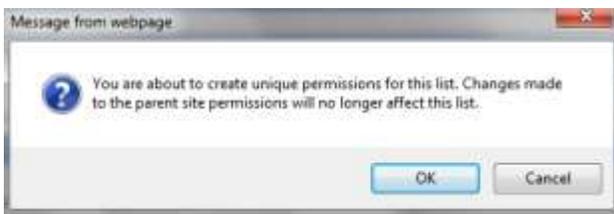


Figure 23

6. Click **Ok.**

Note: Prior to breaking the inheritance you will note that the groups are grayed out and have nothing beside the names of the groups, as shown in Figure 19.



Figure 24

You will see once you select to break the inheritance; the groups will now have check boxes beside them, as shown in Figure 20. (This is a good indicator that the permissions are custom and apart from the site.)

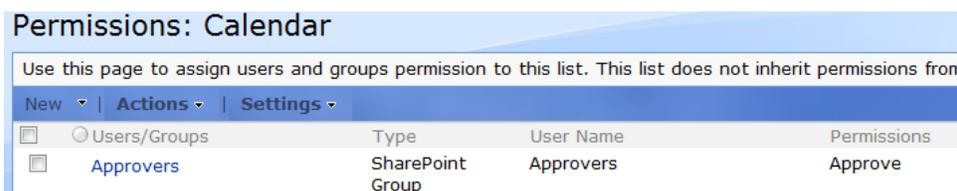


Figure 25

7. Once the groups have the checkboxes beside each group they can now be modified.

TO MODIFY THE GROUPS PERMISSIONS

8. Click on the group that you want to change the permission levels.

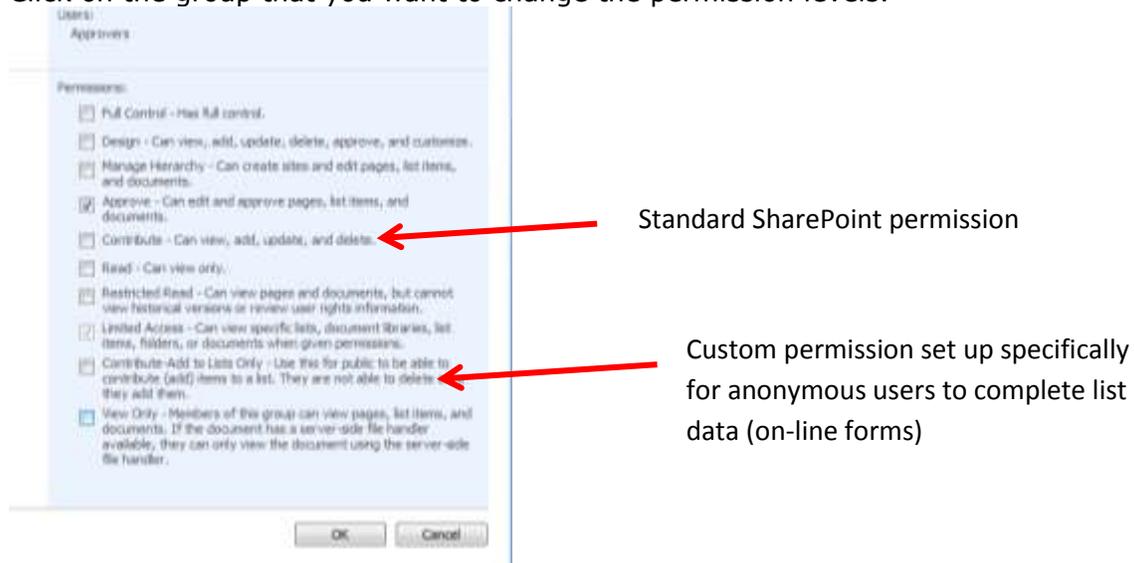


Figure 26

9. Select the appropriate permission levels (using the example calendar above, you would select **Contribute – Can view, add, update, and delete.**

Note: Figure 21 shows an example of a custom permission level that was set up for anonymous users to be able to add content to a list but not see or delete any other content of that list.

Once you set up permissions for a list, there is one other area to consider that can work in conjunction with list SharePoint security.

TO CHANGE A USERS OPTIONS FOR READ/EDIT

10. Go back to the settings window for that list.



Figure 27

11. Click on **Advanced settings**, opening up the following options window.



Figure 28

12. The only options we are going to work with on this for security purposes is **Read access** and **Edit access** and **Allow items from this list to appear in search results**.

13. Read Access

- All Items = If this is selected all users can read all items.
- Only their own = If this is selected then all users can only see their own items.

14. Edit access

- All Items = If this is selected all users can read all items.
- Only their own = If this is selected then all users can only see their own items.
- None = no user can edit any of the list items.

15. Allow items from this list to appear in search results

- If you want this list omitted from any search results on the website you want to make sure you select **Yes**

16. Once your changes are completed, click **OK**

SPECIAL NOTES FOR ANONYMOUS USERS

There may be cases where you want to collect information from the public without them having any rights assigned on your website or in SharePoint. In this case, they are not even registered! For anonymous access you must:

17. Go to the **list settings** screen, select **Permissions for this list**.

New ▾ Actions ▾ Settings ▾				
<input type="checkbox"/>	Users/Groups	Type	User Name	Permissions
<input type="checkbox"/>	County Members	SharePoint Group	County Members	Contribute-Add to Lists Only
<input type="checkbox"/>	County Owners	SharePoint Group	County Owners	Full Control
<input type="checkbox"/>	County Visitors	SharePoint Group	County Visitors	Contribute-Add to Lists Only

Figure 29

18. Click on Settings

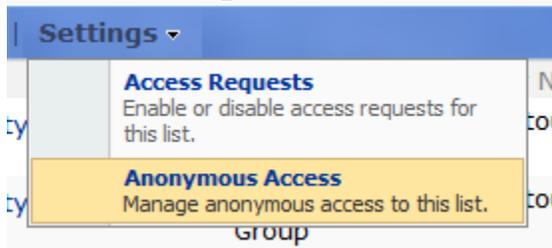


Figure 30

19. Select Anonymous Access

Depending upon the rights you want the anonymous users to have, click to put a checkmark in the appropriate box. (

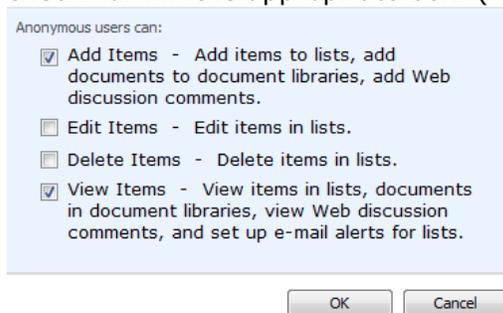


Figure 31

- In Figure 26, the need was to have them add items to a list but not be able to edit or delete any item.

20. Under Advanced settings (Figure 23) you must have Read Access set to All Items else it would require a login to identify who the person is!

This completes the instructions for a list and setting up security, including anonymous access.

Appendix B

Views are used to display certain list information in a certain way on a web page.

SETTING UP A VIEW ON A LIST

1. Login to the website.
2. Go to the list where you want the views (or if you are in the process of creating them you may do this all at one time.)
3. On the **General Settings** window
4. Scroll to the bottom where you will see **Views**

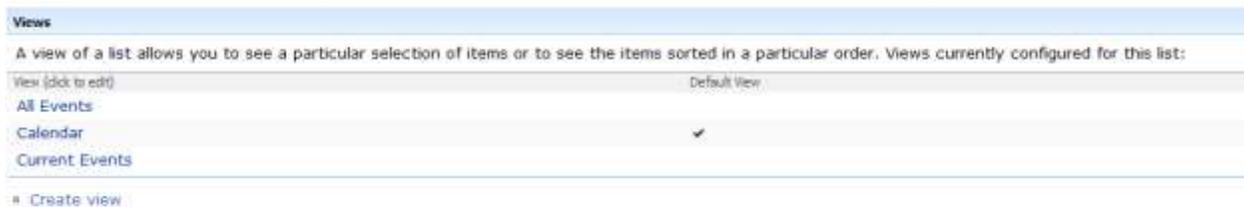


Figure 32

5. Click on **Create View**



Figure 33

- This opens the window in Figure 33. On this window you have standard options for the types of views to create based on the type of list.
 - You also have the options to **Start from an existing view**.
 - It is often helpful to start from an existing view (either using all items or if you created a view, you can use that as a starting point.)
 - For this example, we are using a calendar, and you would only want a calendar view with a calendar list.
 - For this example we will start from an existing view, and selecting **All Events**.
6. Select **All Events** under where it states **Start from an existing view**.

- **All Events** uses a table type list view.
- When you select the type of view it opens up the window to set up the settings for your view, as show in Figure 34.

Use this page to create a view of this list.

<p>Name</p> <p>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 this link.</p>	<p>View Name:</p> <input type="text"/> <p><input type="checkbox"/> Make this the default view (Applies to public views only)</p>																														
<p>Audience</p> <p>Select the option that represents the intended audience for this view.</p>	<p>View Audience:</p> <p><input type="radio"/> Create a Personal View Personal views are intended for your use only.</p> <p><input checked="" type="radio"/> Create a Public View Public views can be visited by anyone using the site.</p>																														
<p>Columns</p> <p>Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the Position from left box.</p>	<table border="1"> <thead> <tr> <th>Display</th> <th>Column Name</th> <th>Position from Left</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Recurrence</td> <td>1</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Attachments</td> <td>2</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Workspace</td> <td>3</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Title (linked to item with edit menu)</td> <td>4</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Location</td> <td>5</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Start Time</td> <td>6</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>End Time</td> <td>7</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>All Day Event</td> <td>8</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Content Type</td> <td>9</td> </tr> </tbody> </table>	Display	Column Name	Position from Left	<input checked="" type="checkbox"/>	Recurrence	1	<input checked="" type="checkbox"/>	Attachments	2	<input checked="" type="checkbox"/>	Workspace	3	<input checked="" type="checkbox"/>	Title (linked to item with edit menu)	4	<input checked="" type="checkbox"/>	Location	5	<input checked="" type="checkbox"/>	Start Time	6	<input checked="" type="checkbox"/>	End Time	7	<input checked="" type="checkbox"/>	All Day Event	8	<input type="checkbox"/>	Content Type	9
Display	Column Name	Position from Left																													
<input checked="" type="checkbox"/>	Recurrence	1																													
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<input checked="" type="checkbox"/>	Title (linked to item with edit menu)	4																													
<input checked="" type="checkbox"/>	Location	5																													
<input checked="" type="checkbox"/>	Start Time	6																													
<input checked="" type="checkbox"/>	End Time	7																													
<input checked="" type="checkbox"/>	All Day Event	8																													
<input type="checkbox"/>	Content Type	9																													

Figure 34

SELECTING WHAT FIELDS TO DISPLAY ON YOUR VIEW

7. View Name = Enter a name for your view.

- It is recommended that you name the view according to the purpose of the view, for example, if a shared calendar and you are creating a view for a department, name the view the name of the department.
- Figure 13, Page 5 shows where to add the column, so if you added a column with a field type of **Choice** and added all your departments as a choice, you can filter on this field.

8. View Audience this will most of the time be left at the default value of **Create a Public View**.

9. Where you see **Display**, **Column Name**, and **Position from Left** you select which fields you want to display on your view by checking or unchecking those items.

- You may also rearrange the order of the column by changing the Position from Left numbers.

SORTING

- You may set up a sort on your view on any of the fields within your list.
10. Select the field for the **First sort by the column** (this will be the first level of sorting).
 11. Select the order **Ascending or Descending**.
 12. Select a second sorting column if applicable, if not, just leave it defaulted to **None**.



Figure 35

USING FILTERS

- You can set up filters on your list, so for example, only show fields that contain a certain word like EMS in the Department field. Your view would then only show the fields that have EMS as the Department.



Figure 36

13. If you want to use a filter, click where it states **Show items only when the following is true:**

- Show the items when column** = use the drop down to select your column
- The second drop downs are filter operators (shown in Figure 37). **Contains** is a good one if you do not want to use verbatim information.
- You may select multiple filters together by using the **and** or the **or** and following the above step to add more filter criteria.
- You may use specific formulas in as a filter, for example, if you want a field based on when it was entered you would use the filter of **is equal to** and you would put in a formula of [Today] versus a specific word.

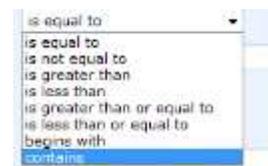


Figure 37

RESOURCES ON FORMULAS FOR LISTS

- <http://office.microsoft.com/en-us/windows-sharepoint-services-help/calculate-data-in-lists-or-libraries-HA010105480.aspx>
- <http://office.microsoft.com/en-us/windows-sharepoint-services-help/examples-of-common-formulas-HA001160947.aspx>
- <http://vspug.com/mkruger/2007/06/26/using-today-in-a-calculated-formula-birthday-lists/>

GROUP BY

- You may use the group by to group like information together.



Figure 38

14. Select where it states **First group by the column** and use the drop down to select your field you want to group by.
 - Select the order that you want them to appear.
15. Select if you want the group collapsed (as user has to click a + to show all items) or expanded (all are showing)
16. Select the number of items to display.

OTHER OPTIONS AVAILABLE WHEN WORKING WITH LISTS

- **Totals** = helpful if a field of numeric or currency values.
- **Style** = How your list will be displayed.
- **Folders** = If you use folders instead of metadata, you can choose to ignore these in your view.
- **Item Limit** = Set the limit of how many display on your list view.
- **Mobile** = Is your list a mobile view?
- This concludes setting up a view for your list.
- Note that you may also do this all through a list view web part as indicated in **Appendix C**.

Appendix C

Once you create a list, create a view, it is now time to add that to a page. This can be a great way to have data displayed on your site as it can help minimize maintenance efforts moving forward.

It is more setup up front but saves time over the use of your website.

ADDING A VIEW OF A LIST TO A WEB PAGE

1. Create a new page by clicking **Site Actions** -> **Create Page**.
 - Make sure you are on the right site where the page will be managed!
2. Click on any one of the zones and where it states **Add a Web Part**

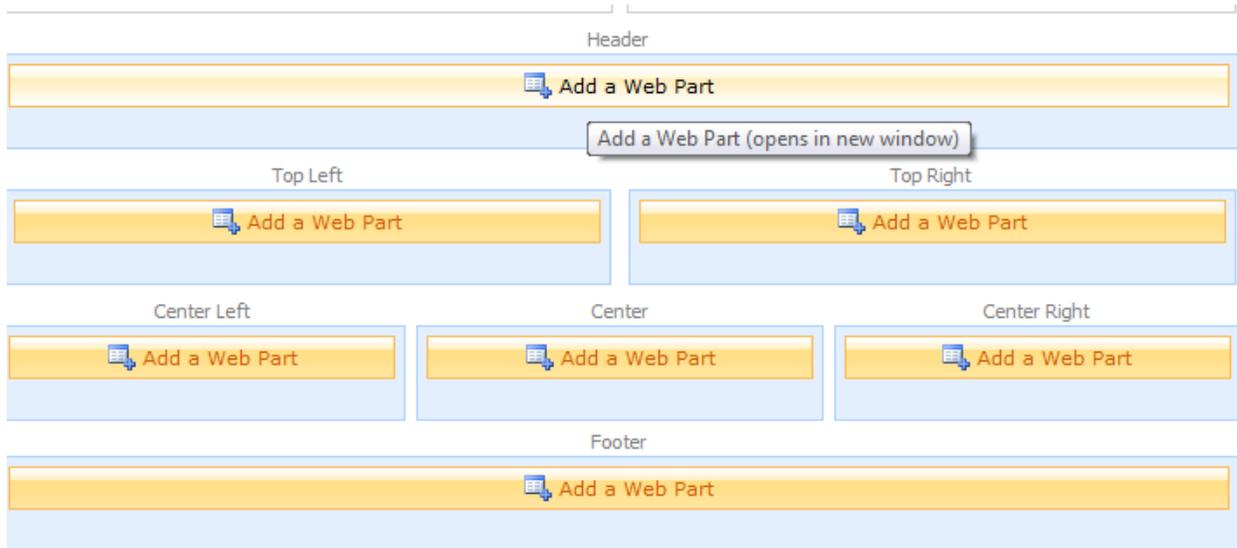


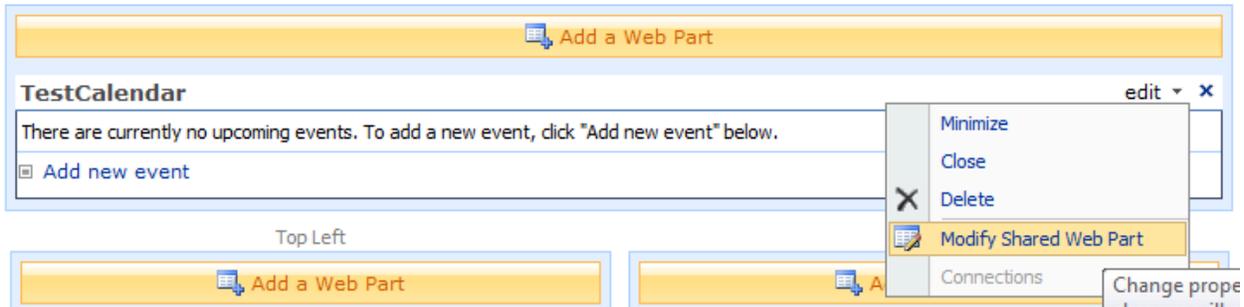
Figure 39

- This opens the web part selection window.
3. Put a check in the box beside your list you want to add to a page. Click **Add**

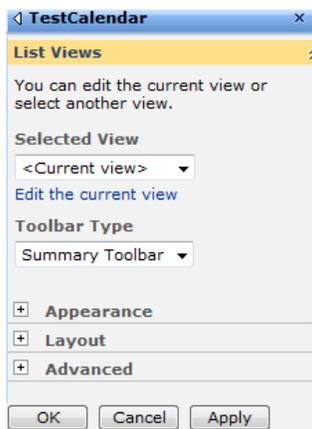


Figure 40

4. Click on **edit** then **Modify Shared Web Part**



- This will open up the options menu for that list.
5. Click the drop down where it states **Select View** (noting it will always say **<Current view>**)

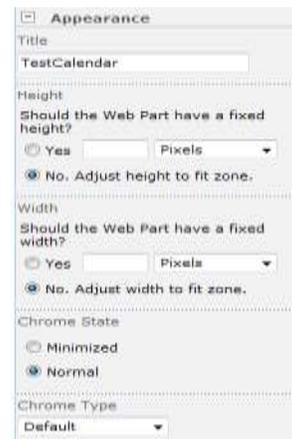


6. This will display the views you have available on this list.
- You may also create a view here for that web part by selecting **Edit the current view**.

OTHER TYPICAL SETTINGS FOR THIS WEB PART

- **Toolbar Type** = Summary or None (You may select full as well – it is a preference and needs based selection.)
- **Appearance**

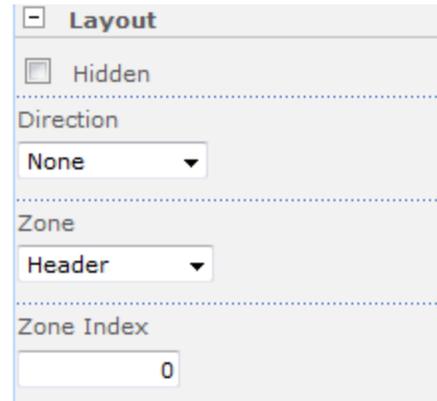
- Title = If you select a chrome type to show title this what will be displayed.
- Height = you can specify the height of the web part
- Width = you can specify the width of the web part
- Chrome State = Normal is recommended
- Chrome Type = None is generally better.



is

- **Layout**

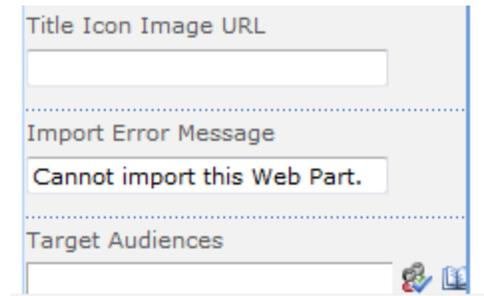
- Hidden = This works well if you are adding CSS or code to do a specific function on a page.
- Direction = typically **None** is selected
- Zone = the areas defined as web part areas on your page. You may select zones to move web parts here.
- Zone = This is the number order the web part appears, so if you have multiple web parts in one zone, it is the order they appear.



The screenshot shows the 'Layout' configuration panel for a web part. It includes a 'Hidden' checkbox, a 'Direction' dropdown menu set to 'None', a 'Zone' dropdown menu set to 'Header', and a 'Zone Index' text box containing the number '0'.

- **Advanced**

- Has many options that you may select from, however the most important to mention is the **Target Audiences**.
- **Target Audiences** allows you to assign a web part to a certain group so that only that group will see that information in that web part.



The screenshot shows the 'Advanced' configuration panel. It features a 'Title Icon Image URL' text box, an 'Import Error Message' section with the text 'Cannot import this Web Part.', and a 'Target Audiences' section with a text box and a small icon.

Example: If you have a list of right to know information, and a manager (internal staff) need to be able to see all the details and add comments to those entries, you can add a view for that manager right on the page using this method and target the group where the manager's username is added.

7. Once you are done making all your selections, click **OK**.

8. Publish your page

This concludes how to add a list view to a page.