KEVIN O'NEILL

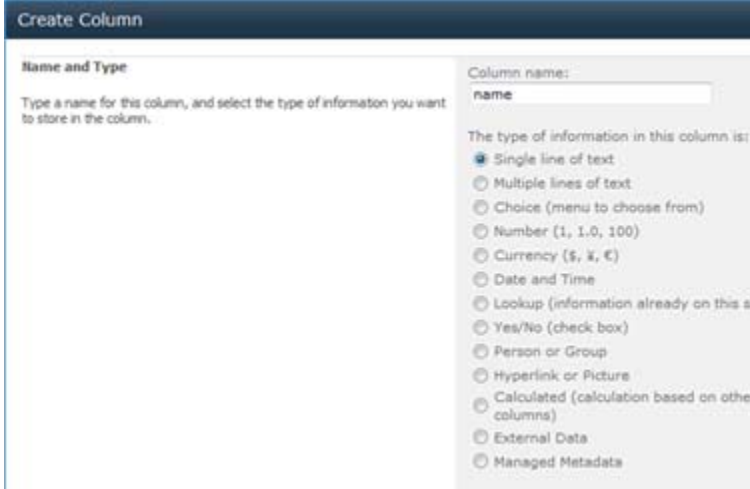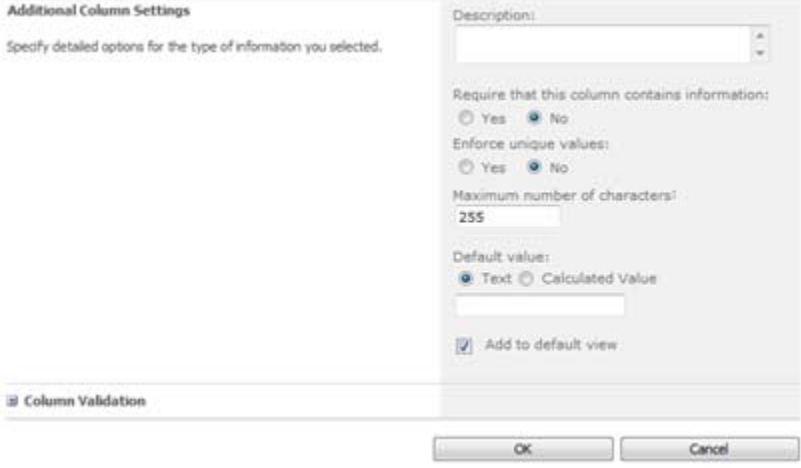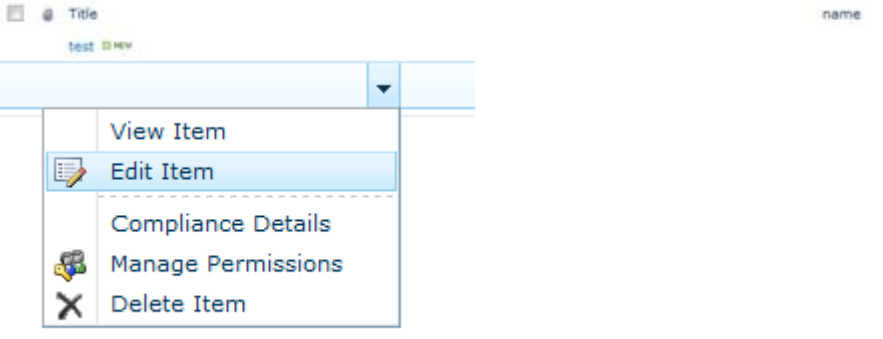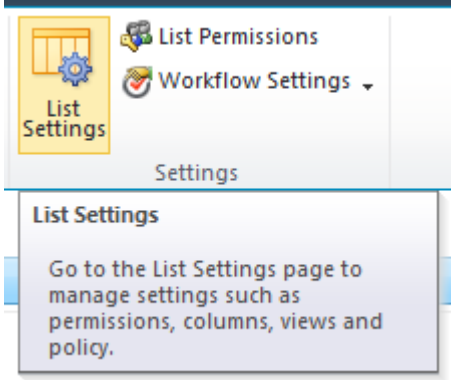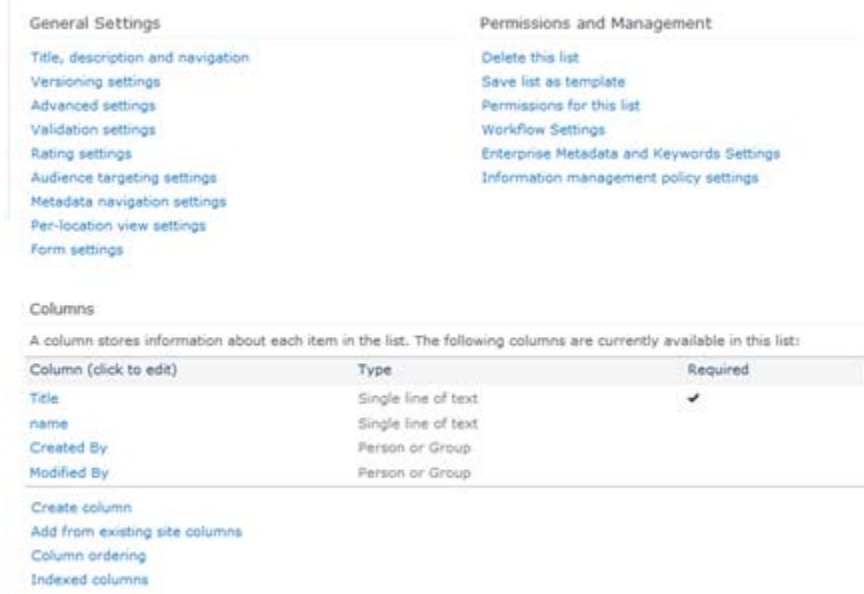|		
• **SharePoint 2010 Lists** 1. In this section creating lists and libraries is reviewed. To create a list select Site Actions -> More Options.	**Edit Page** Change the content and Web Parts on this page. **Sync to SharePoint Workspace** Create a synchronized copy of this site on your computer. **New Page** Create a page in this site. **New Document Library** Create a place to store and share documents. **New Site** Create a site for a team or project. **More Options...** Create other types of pages, lists, libraries, and sites.	
2. Select Custom List and on the right hand side name the list – in this case it's been named KMO_LIST. Click Create when done.	Title ▲ Type Asset Library Custom List Document Library Enterprise Wiki Import Spreadsheet Page Picture Library Publishing Page	**Custom List** Type: List Categories: Blank & Custom A blank list to which you can add your own columns and views. Use this if none of the built-in list types are similar to the list you want to make. [KMO_LIST] [Create] [More Options]
3. The request is processed.	⋮ Processing… Please wait while your changes are processed.	
4. The list shell is shown and to add items to the list one should select Add new item	☐ @ Title There are no items to show in this view of the "KMO_LIST" list. To add a new item, click "New". ✚ Add new item	

5. One can then enter in the content of the list then select the Save button	KMO_LIST - New Item Edit Save Cancel Paste Cut Copy Attach File Spelling Commit Clipboard Actions Spelling Title * test Save Cancel
6. The item(s) are then displayed.	Title test NEW Add new item
7. If additional data is to be stored in the list – a user can select from the List Tools tab -> list -> Create Column	List Tools Items List Modify View Current View: Create Column All Items Create View Navigate Up Current Page Manage Views Title Create Column test Add a column to store additional information about each item in this list. Add new it
8. A user would then select the name of the column in this example; it has been called name and the type of information to collect. They would then scroll down	Create Column Name and Type Type a name for this column, and select the type of information you want to store in the column. Column name: name The type of information in this column is: ◉ Single line of text ○ Multiple lines of text ○ Choice (menu to choose from) ○ Number (1, 1.0, 100) ○ Currency ($, ¥, €) ○ Date and Time ○ Lookup (information already on this site) ○ Yes/No (check box) ○ Person or Group ○ Hyperlink or Picture ○ Calculated (calculation based on other columns) ○ External Data ○ Managed Metadata

9. Additional Column Settings which include if the information is required, allows for unique values, maximum number of characters, a default value as well as if the column should be added to the default view should be entered and selected. A user would click OK when done entering in the desired information.	**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 default view ⊞ Column Validation OK Cancel

10. The column is then displayed in the list. If content is desired to be entered into the existing item – that item should be selected and the Edit Item selected. Content can then be entered into the new column and saved.	☐ 📄 Title name
	test 🆕 NEW
	
	  ▼
	    View Item
	📝 Edit Item
	
	    Compliance Details
	📇 Manage Permissions
	✕ Delete Item

11. If changes to the List settings are desired to be made in the far right hand corner of the screen in the Settings options select List Settings.	
12. Here a user can perform many useful operations such as deleting the list, setting the permissions for the list as well as create columns and change the order display of existing columns.	

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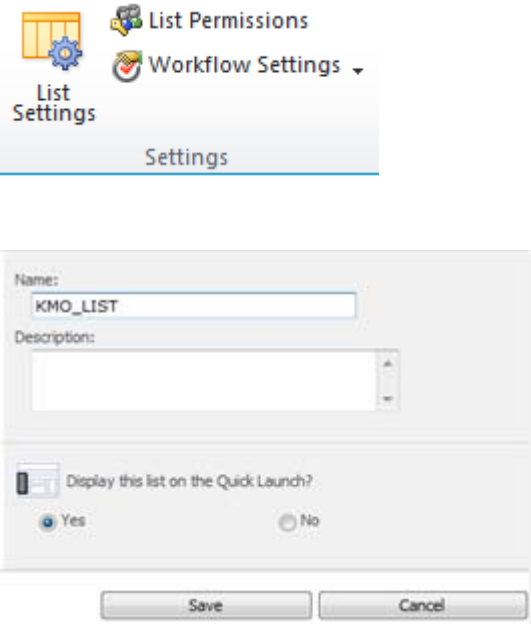|	
13. Those items under General Settings are explained here:	**General Settings** Title, description and navigation Versioning settings Advanced settings Validation settings Column default value settings Manage item scheduling Rating settings Audience targeting settings Metadata navigation settings Per-location view settings Form settings Title, description and navigation – this is used to change the display name and can be used to add a description as well as decide if a link appears on the quick launch bar. Versioning settings - this is used to turn off and on content approval, set versions of items as well as set if one has to check out items before editing. Advanced settings – this section has several miscellaneous settings that can be utilized which include those for content types, item level permissions, e-mail notifications, attachments, folders, searching and datasheets. Rating settings – used to enabled/disable the five star rating system available. Audience targeting settings – allows for the ability for content to be targeted to a said user base. Metadata navigation settings – allows for keywords from a list to be used in the navigation tree view. Per-location view settings – allows for the setting of which Views can be displayed for a folder or content type. Form settings – used for InfoPath if utilized on the list or document library.

14. The title, description and navigation is an important and useful item and deserves a description. In this example, we will assume that the previously created KMO_DOCS library needs changed so from Library Tools -> Library -> under Settings select Library Settings. Click under General Settings the Title, description and navigation link. In the Name field – place the cursor in that field and make the desired changes, then if desired add a description text and select whether to add the link to the quick launch or not then select Save.	Library Settings Library Permissions Workflow Settings ▾ Settings Name: KMO_DOCS Description: Display this document library on the Quick Launch? ⦿ Yes ○ No Save Cancel

15. For a list item the same process would be followed thus in this example, we will assume that the previously created KMO_LIST needs changed so from List Tools -> List -> under Settings select List Settings. Click under General Settings the Title, description and navigation link. In the Name field – place the cursor in that field and make the desired changes, then if desired add a description text and select whether to add the link to the quick launch or not then select Save.	List Settings List Permissions Workflow Settings Settings Name: KMO_LIST Description: Display this list on the Quick Launch? ● Yes ○ No Save Cancel

Note: A list or library has two names, the name in the URL and the display name. When either item is initially created the name entered is what will be used as the URL name. In this case the document library is for examples sake KMO_DOCS – so the URL would be: http://myservername/sites/KMO_DOCS/Forms/AllItems.aspx if the name of the document library was changed to KMO_DOCS2 – the display name would be KMO_DOCS2 but the URL would remain with the KMO_DOCS in the name.