



SHAREPOINT911

THE SHAREPOINT AUTHORITY

Working with List & Libraries in SharePoint 2010

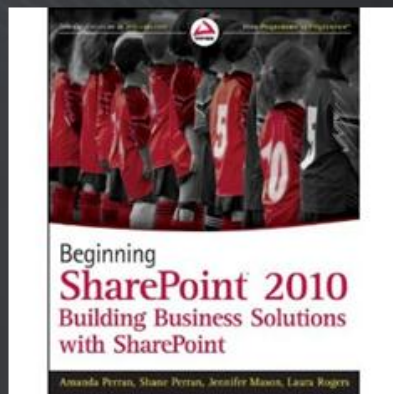
Jennifer A. Mason
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SharePoint911



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About me...

- Consultant with SharePoint911
- Blog:
 - <http://www.sharepoint911.com/blogs/jennifer>
- Twitter: @jennifermason
- Beginning SharePoint 2010: Building Business Solutions with SharePoint
 - <http://www.amazon.com/Beginning-SharePoint-2010-Building-Solutions/dp/0470617896>



SharePoint911

- SharePoint911 was established in 2004 to draw on Shane Young's extensive experience with systems administration and with consulting for clients on SharePoint issues. Over the past several years, SharePoint911 has expanded and evolved. While our ability to respond quickly to specific needs makes us unique, we also offer comprehensive consulting services. Not only do we have extensive, real world experience, but our consultants also teach, write about, and speak on various SharePoint topics.
- We truly are "The SharePoint Authority."
- <http://www.sharepoint911.com>



Assumptions

- A Working Knowledge of SharePoint 2007
- High Level Review of OOTB Features within Lists & Libraries
- There will be NO:
 - Custom Development
 - Central Administration Configuration
- There will be very little (one example):
 - SharePoint Designer



Additional Items

- We only have limited time and there is so much more that we could cover!
- Many of the items we are covering have been featured on my blog with step-by-step instructions & screenshots.
 - Directory of Blog Posts
 - <http://www.sharepoint911.com/blogs/jennifer/Pages/postdirectory.aspx>



Agenda

- Overview of the UI
- Creating New Lists & Libraries
- Customizing List Properties
- List Columns, Content Types & Site Columns
- Views
- Customized Forms
- Additional Items



Where to find things?

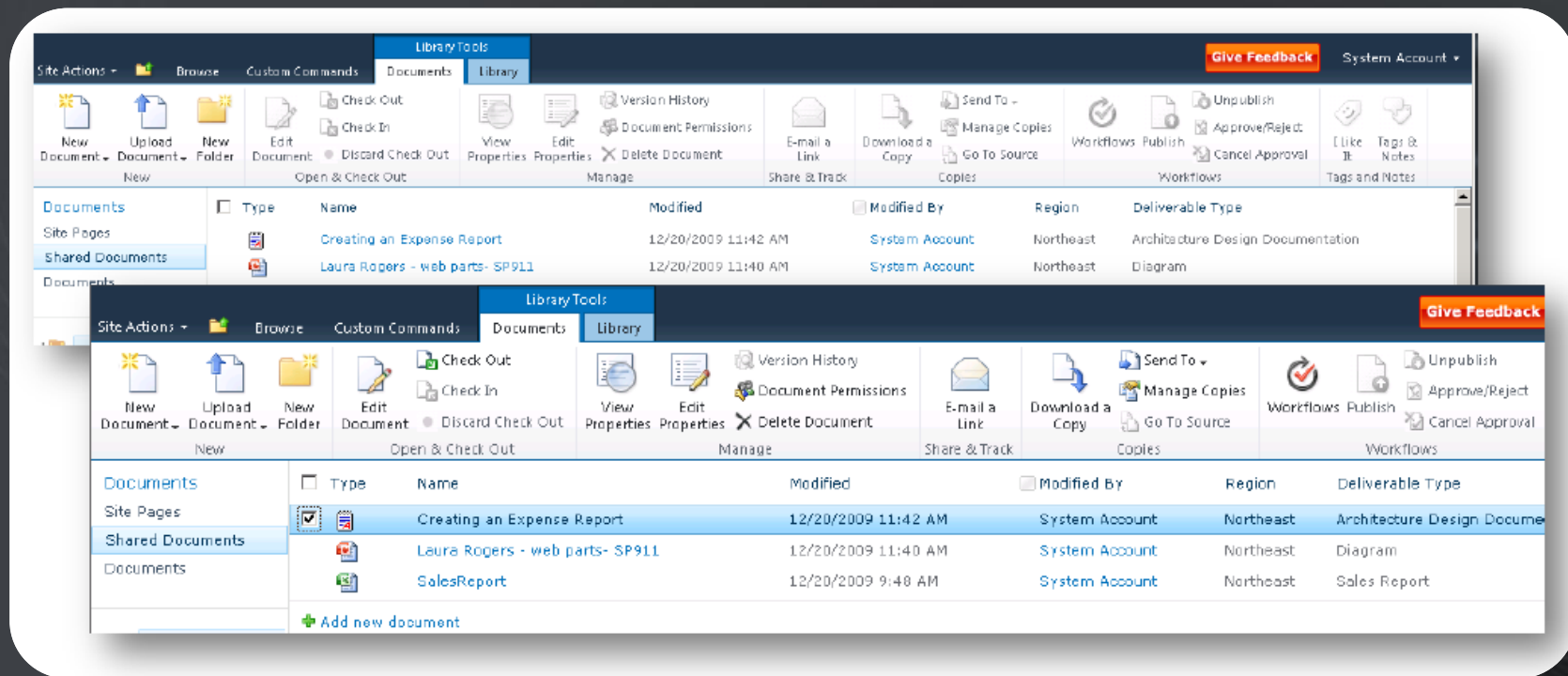
The screenshot shows a SharePoint 2010 site interface. Numbered callouts are placed as follows: 1. Site Actions menu (top left); 2. Breadcrumbs (top left, below Site Actions); 3. Edit Page button (top left, below Breadcrumbs); 4. Ribbon (top left, below Edit Page); 5. User Login / My Site Access (top right); 6. View All Site Content / Recycle Bin (left sidebar).

1. Site Actions Menu
2. Breadcrumbs
3. Edit Page
4. Ribbon
5. User Login / My Site Access
6. View All Site Content / Recycle Bin

- 6. View All Site Content / Recycle Bin
- 5. User Login / My Site Access
- 4. Ribbon
- 3. Edit Page
- 2. Breadcrumbs

Fluent UI aka - Ribbon

- Similar to Office Clients
- Available Commands Based on Location in Site



Demo

Overview of the UI



Why use a list?

- Track & Manage “data”
 - What is data?
- Benefits
 - Consistency
 - Granular Control
 - Permissions
 - Workflow
 - Multi-User Access



Knowing when to use a list....

- Excel Spreadsheets vs. Lists
- Databases vs. Lists

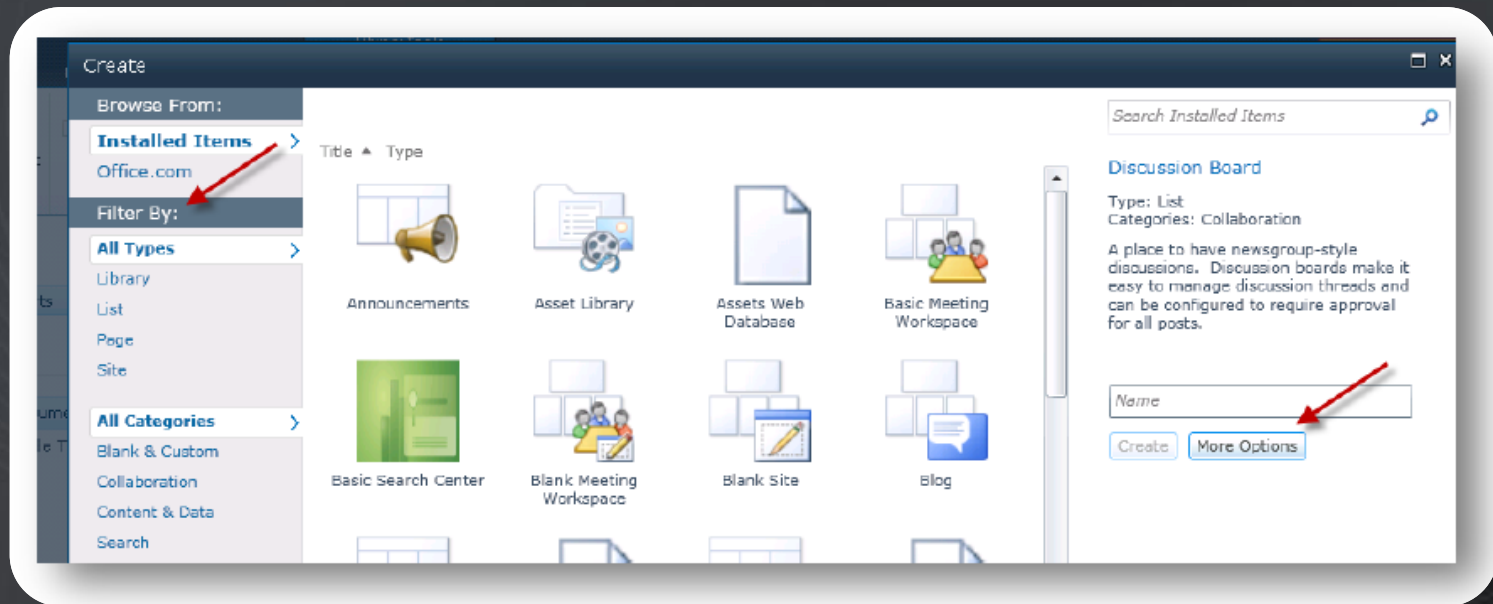
- Lists vs. Libraries

- Where to get started.....
 - Try it out on something small. Learn from the experience and then build more!



Creating New Lists & Libraries

- Creation Screen
 - “Filter” Options
 - More Options



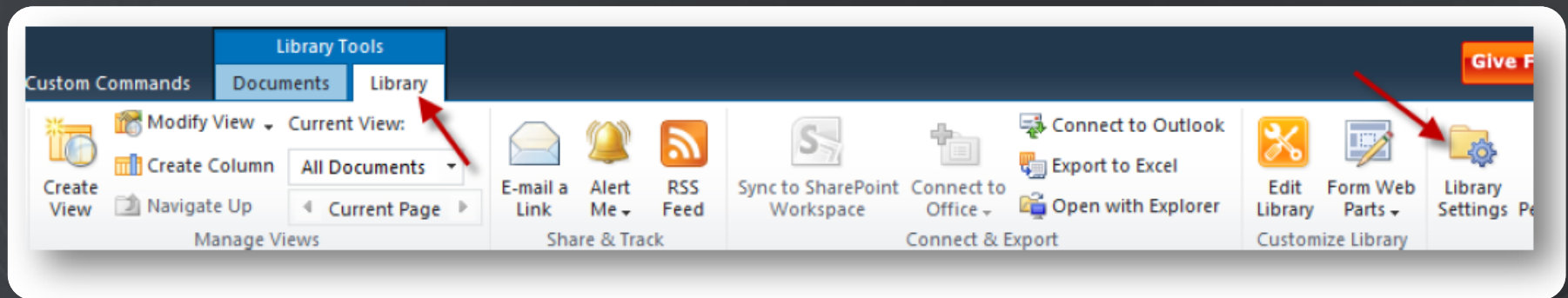
Demo

Creating New Lists & Libraries



Customizing List Properties

- Library Ribbon
- Library Settings Page (Classic View of Settings)



New Options for Customization

List Information

Name: Shared Documents
Web Address: <http://beta.sharepoint911.com/sites/JM/Shared Documents/Forms/AllItems.aspx>
Description: Share a document with the team by adding it to this document library.

General Settings

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

Permissions and Management

[Delete this document library](#)
[Save document library as template](#)
[Permissions for this document library](#)
[Manage files which have no checked in version](#)
[Workflow Settings](#)
[Generate file plan report](#)
[Information management policy settings](#)

Communications

[RSS settings](#)

[Form settings](#)

[Per-location view settings](#)

[Metadata navigation settings](#)

[Advanced settings](#)

New Options for Customization

Feature	Purpose / Example
Ratings	When you would like users to rate the value of the content from their perspective. Other users will then see the combined rankings from all users.
Validation Settings	This allows you to check data as it is entered into the list. An example would be not allowing a start date that is greater than a finish date.
Form Settings	This is where you configure if a list can use InfoPath forms services for customization.
Metadata Navigation	This setting allows you to navigate through the library based on the managed metadata associated with the items.
Generate File Plan Report	This features allows you to generate a report that shows you detailed information about the library.
RSS Settings	Allows you to configure the settings for the lists RSS feed.

Demo

Customizing List Properties



List Columns, Content Types & Site Columns

- New / Updated Column Types
 - Lookup Fields
 - Managed Metadata
- New Features / Functionality
 - Column Validation
 - Enforce Unique Values



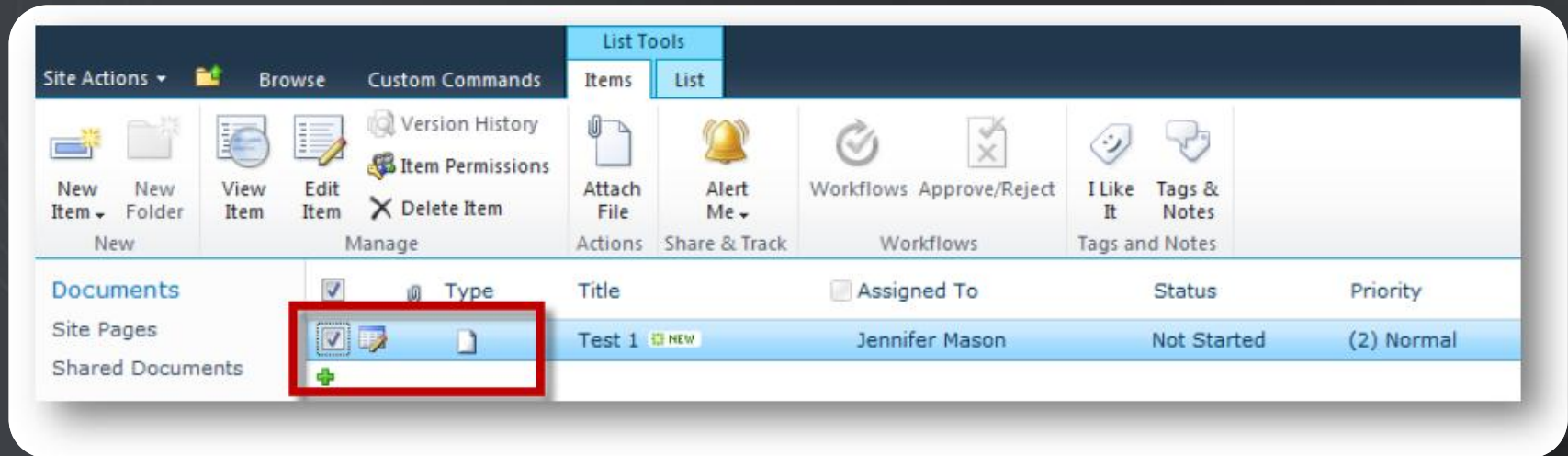
Demo

List Columns, Content Types & Site Columns

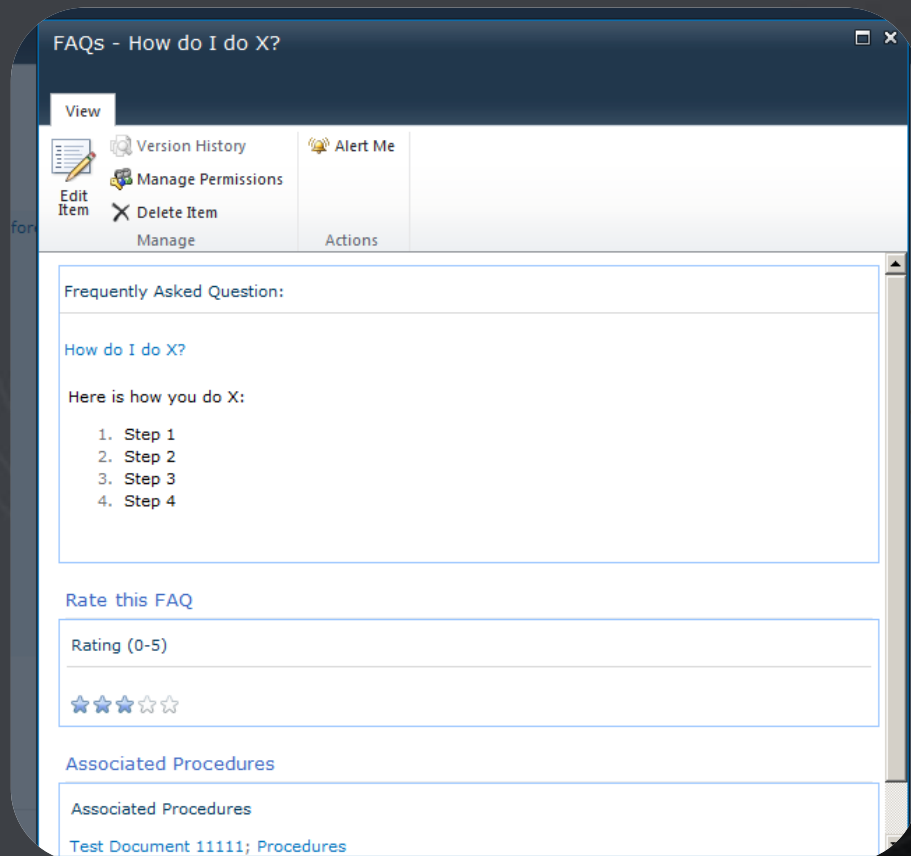


Views

- New Features
 - Inline Editing
 - Views by Location



Views



- Customizing the OOTB List Forms using Web Parts & Views

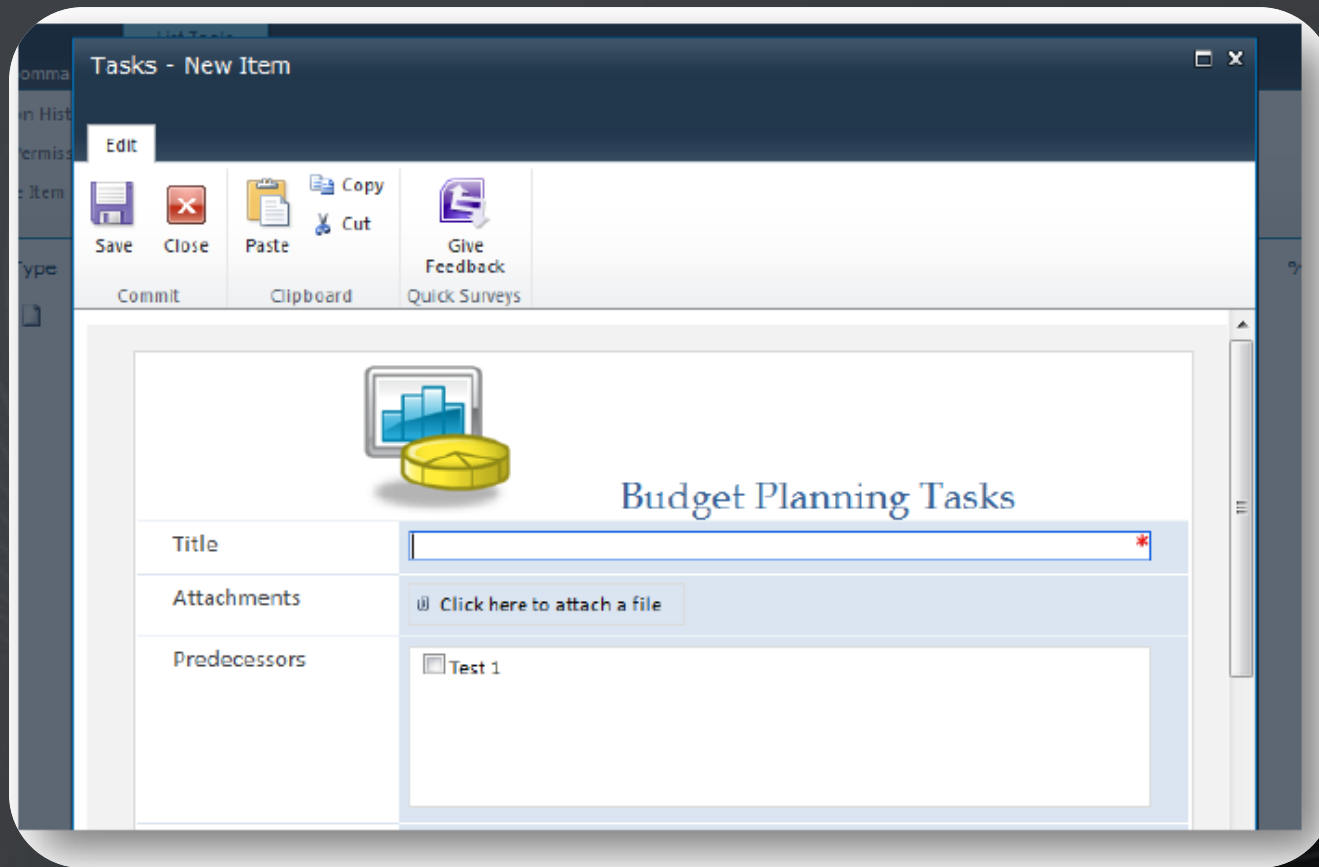
Demo

Views



Customized Forms

- InfoPath 2010



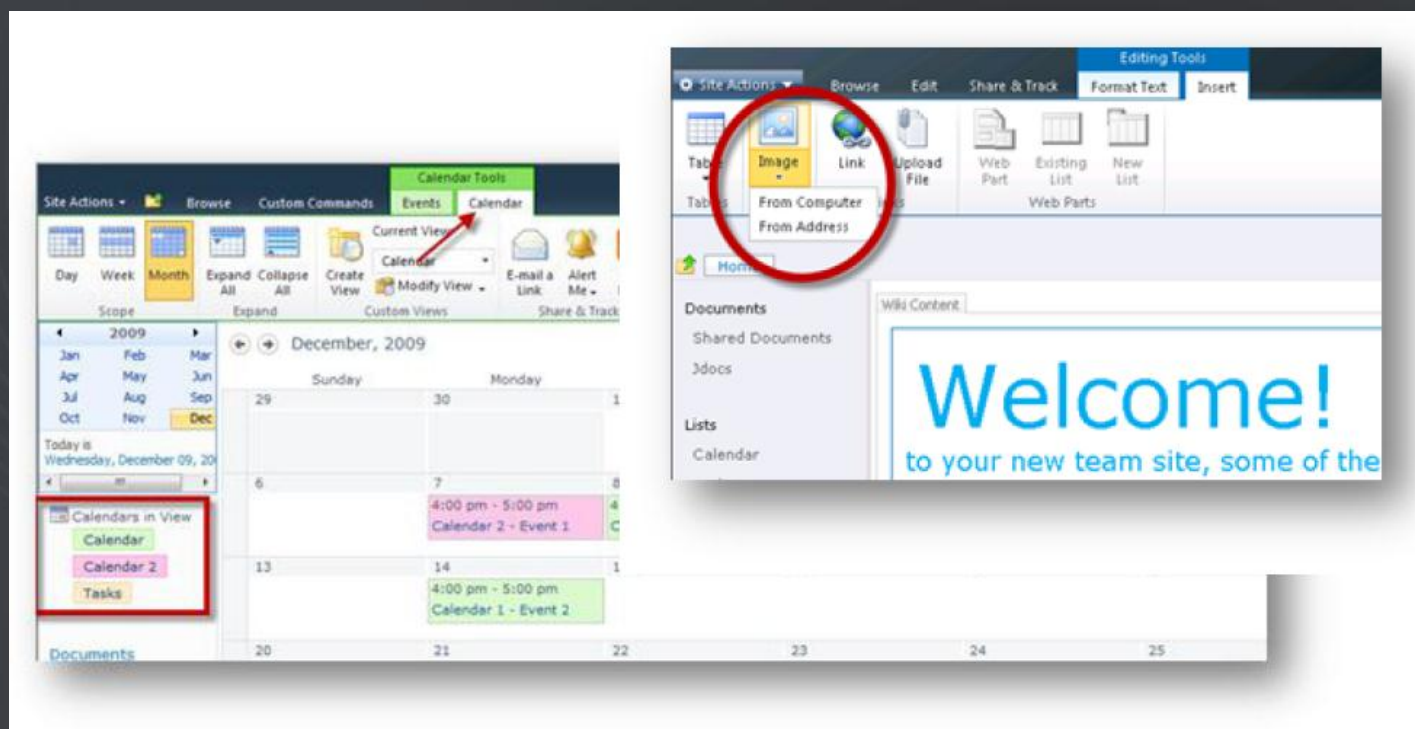
Demo

Customized Forms



Additional Items

- Calendar Overlay
- Assets Library



Demo

Additional Items



Questions?

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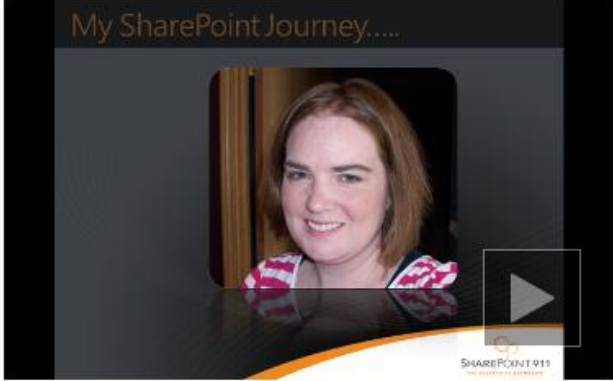
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Shameless Plug.....






- Vote for my SharePoint Journey!
 - [https://sharepoint.microsoft.com/sharepointjourneys/Pages/EntryDetails.aspx?EntryID=41&keyword=Ramping Up](https://sharepoint.microsoft.com/sharepointjourneys/Pages/EntryDetails.aspx?EntryID=41&keyword=Ramping%20Up)

Getting Started with SharePoint
by SharePoint911



Jennifer talks about her SharePoint Journey starting with building simple business solutions and then moving towards more complex business solutions.

Video Rating-Share this video.
★★★★★

★★★★★
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