

# Training Manual

# Manage Lists

## SharePoint 2013 – GTA Platform

**Prepared By:** GeorgiaGov Interactive

**Support:** For further assistance, fill out a Support Request at <http://portal.georgia.gov/support>

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## 1.0 Overview

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SharePoint 2013 is a centralized document repository for use on the intranet. The site pages are consistent in look and feel throughout the site. SharePoint 2013 can also be used as a content management tool that will allow users to edit and manage their intranet site.

This manual will help users to understand and use some of the SharePoint 2013 Advanced Concepts that require use of **Add an App** and **Ribbons** tools.

### 1.1 Intended Audience

The intended audience for this course is GTA content managers and project managers who have a basic understanding of SharePoint 2013. Mastery of the content in SharePoint 2013 **Basic Concepts** or **Work with Documents** will provide a sufficient foundation for attending the **Manage Lists** course.

### 1.2 System Requirements

For maximum performance, the recommended browser is Internet Explorer 11. Limited support is provided for the Google Chrome browser.

If your computer does not have one of the recommended browsers, please contact the Help Desk for assistance

### 1.3 Terminology

**Content Item** – a piece of content that is used in your agency’s site and includes a title and other customized fields.

**Content Manager** – a user responsible for a single site including its lists, libraries, content and any sub-sites of the site, i.e. a user with full control rights to a single site. Also called the site owner.

**Content Type** – columns associated with content: metadata, properties, template, workflows and information management policies

**Gear** – an icon  located in the upper right corner at the top of the SharePoint page next to your name that is used to access settings within SharePoint.

**Gold bar** – top navigation on the master page that contains tabs linking the user to other pages in the site collection.

**Landing page** – the web page that is displayed when a visitor clicks on a tab.

**Master page** – a web page in a site that defines the look, feel and standard behavior of all other web pages in the site.

**Metadata** – terms used to classify items; also referred to as ‘site columns.’

**Quick Launch** – links on the left of the page that remains permanently in the layout.

**Ribbon** – a central place at the top of a SharePoint page to find groups of commands for interacting with SharePoint.

**SharePoint Site Administrator** – the user responsible for the entire site collection who has access to all site collection features included in site settings, i.e. the person responsible for GTA’s entire site collection.

**Support Services** – the GTA team that manages the GTA help desk for SharePoint 2013 issues.

Support Services is located at:

<http://support.georgia.gov>

**URL** – a link that is formatted with the web path for accessing a web page.

e.g. GTA’s SharePoint 2013 production site URL is: <https://mygta.ga.gov/>

## 2.0 Edit Tools

SharePoint 2013 introduces some new tools that have expansive functionality:

- Gear
- Ribbons
- Settings

You’ll become more familiar with these tools as you continue through the course.

**Note:** Some functionality on the gear is also available on the ribbon.

### 2.1 Gear

A powerful tool that is used in SharePoint 2013 is the ‘gear’ . When you click the gear , a drop down will display with various options, e.g. Edit page, Add an app, etc. Depending on your permissions, the drop down will only display options you are granted permission to use.

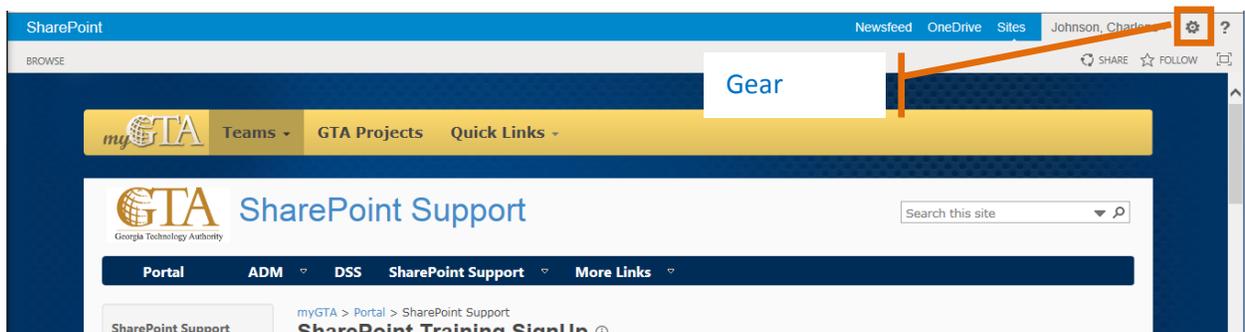


Figure 1 The gear  when granted edit or app permission

**Note:** The gear  will not display if the user only has read permission.

## 2.2 List Ribbon

The List Ribbon contains additional content controls that will allow you to edit and customize the view of the list.

To view the List Ribbon,

1. Navigate to the list you want to customize
2. SharePoint will display the content control, if you have sufficient permission
3. Select the **LIST** tab on the content control
4. SharePoint will display the List ribbon.

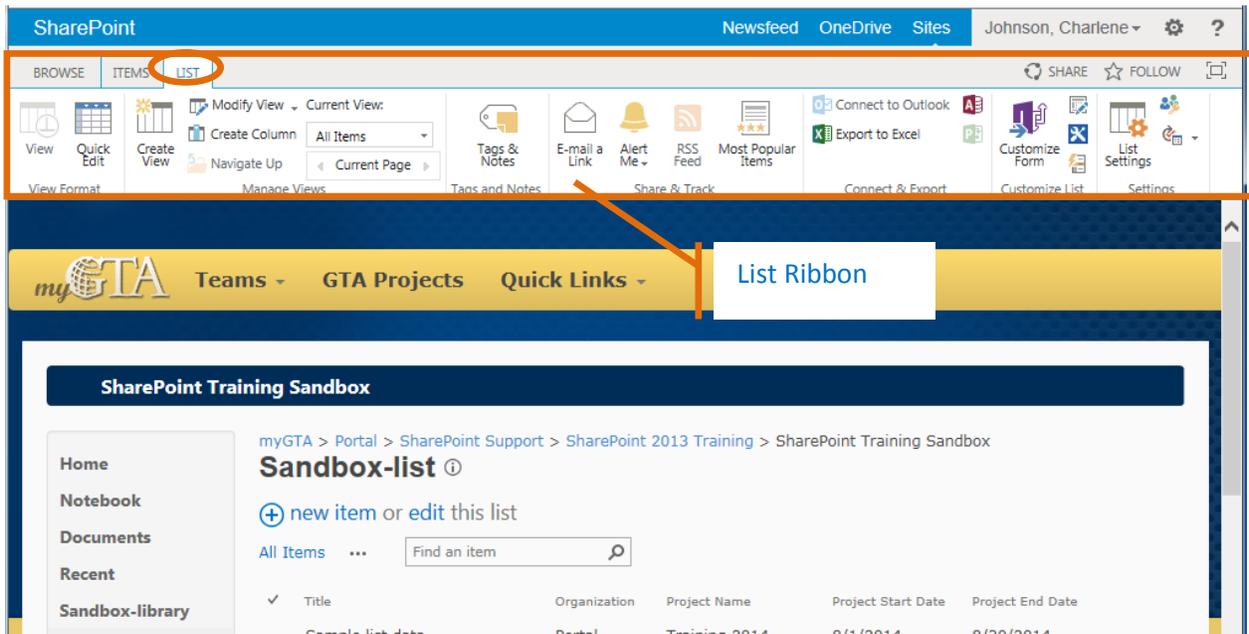


Figure 2 List Ribbon when you select LIST on the control tab

## 3.0 List Settings

You can always navigate to a list using Site Content which is the container for all site items. You can also navigate to a list using Quick Launch which is a shortcut that can be set up for easy access to a list.

After you navigate to the list, you will use **List Settings** to control the list structure, permissions and display.

### 3.1 Display Settings Using Quick Launch

To navigate to Library Settings using **Quick launch**,

1. Click on the list name using **Quick Launch**
2. Click the **LIST** control tab

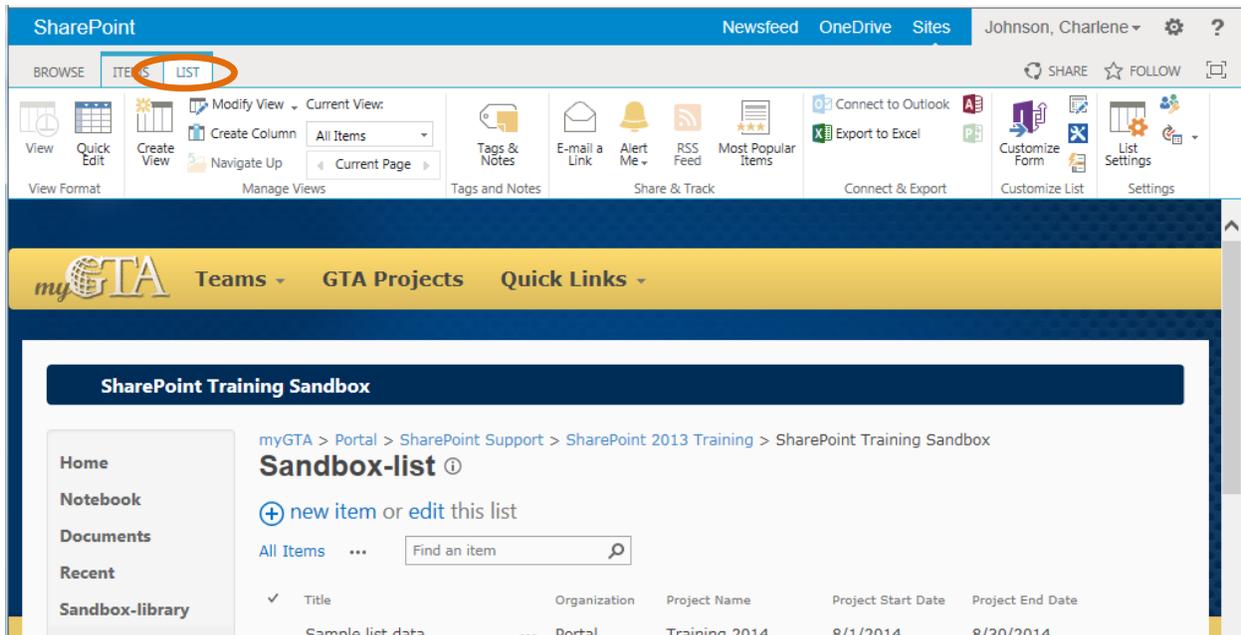


Figure 3 LIST control tab when you are on the list page

3. SharePoint will display the list ribbon
4. On the ribbon, click **List Settings**

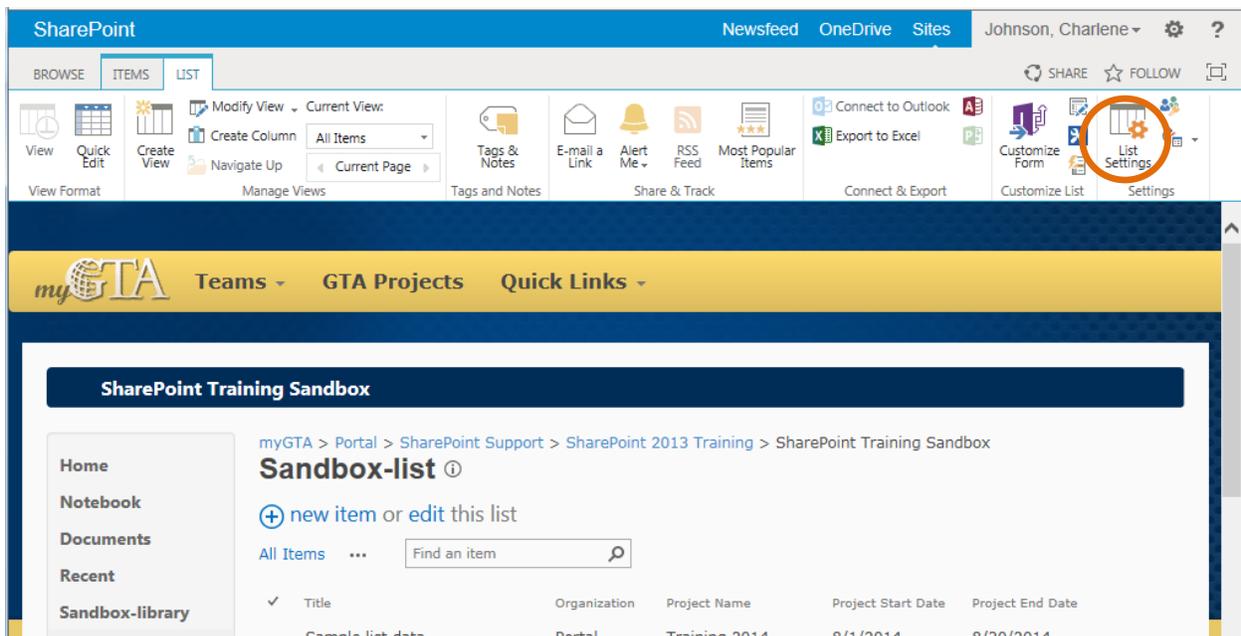


Figure 4 List Settings when the list ribbon is displayed

5. SharePoint will display the **Settings** page for the list

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**SharePoint Training Sandbox**

myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox

**Sandbox-list** > **Settings**

List Information  
**Name:** Sandbox-list  
**Web Address:** https://mygta.ga.gov/portal/spsupport/sptraining/sptrainingsandbox/Lists/Sandboxlist/AllItems.aspx  
**Description:** This is the sandbox area that contains a list

General Settings Permissions and Management Communications

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Audience targeting settings
- Rating settings
- Form settings
- Catalog Settings
- 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 columns are currently available in this list:

Column (click to edit)	Type	Required
<a href="#">Title</a>	Single line of text	✓
<a href="#">Organization</a>	Choice	✓
Project Name	Single line of text	
Project Start Date	Date and Time	✓
Project End Date	Date and Time	
Modified	Date and Time	
Created	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	

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

Views  
 A view of a list allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently configured for this list:

View (click to edit)	Default View	Mobile View	Default Mobile View
<a href="#">All Items</a>	✓	✓	✓

- Create view

Figure 5 List Settings page when you select List Settings from the ribbon

## 3.2 Display Settings Using Site Contents

To navigate to **List Settings** using **Site Contents**,

1. Navigate to the page with the **Site Contents**
2. Click **Site Contents**
3. SharePoint will display one or more pages containing a tile for each of the items in the site content
4. Scroll through the **Site Contents** and find the list you want to use

The screenshot shows the SharePoint interface for a 'SharePoint Training Sandbox' site. The top navigation bar includes 'SharePoint', 'Newsfeed', 'OneDrive', and 'Sites'. The user is identified as 'Johnson, Charlene'. The site header features the 'myGTA' logo and navigation links for 'Teams', 'GTA Projects', and 'Quick Links'. The main content area is titled 'SharePoint Training Sandbox' and displays a breadcrumb trail: 'myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox'. Below the breadcrumb, the page is titled 'Site Contents' with the subtitle 'Lists, Libraries, and other Apps'. A left-hand navigation pane contains links for 'Home', 'Notebook', 'Documents', 'Recent', 'Sandbox-library', 'Sandbox-list', 'Demo-Library', 'Sample-Library-03', 'Sample-Library-04', 'Sample-Library-02', 'Sample-Library-01', and 'Site Contents' (circled in orange). The main content area displays a grid of content items, each with a folder icon and text indicating the item name, item count, and modification time. The items include 'add an app', 'Documents' (19 items), 'Sample-Library-01' (6 items), 'Sample-Library-03' (2 items), 'Sandbox-library' (30 items), 'Demo-Library' (1 item), 'MicroFeed' (2 items), 'Sample-Library-02' (2 items), 'Sample-Library-04' (2 items), and 'Sandbox-list' (17 items, circled in orange). At the bottom, there are partial views of 'Site Assets' and 'Site Pages'.

Figure 6 The list name when you display Site Contents

5. Hover over the list name until the **ellipses** display under the list name and then click the **ellipses**

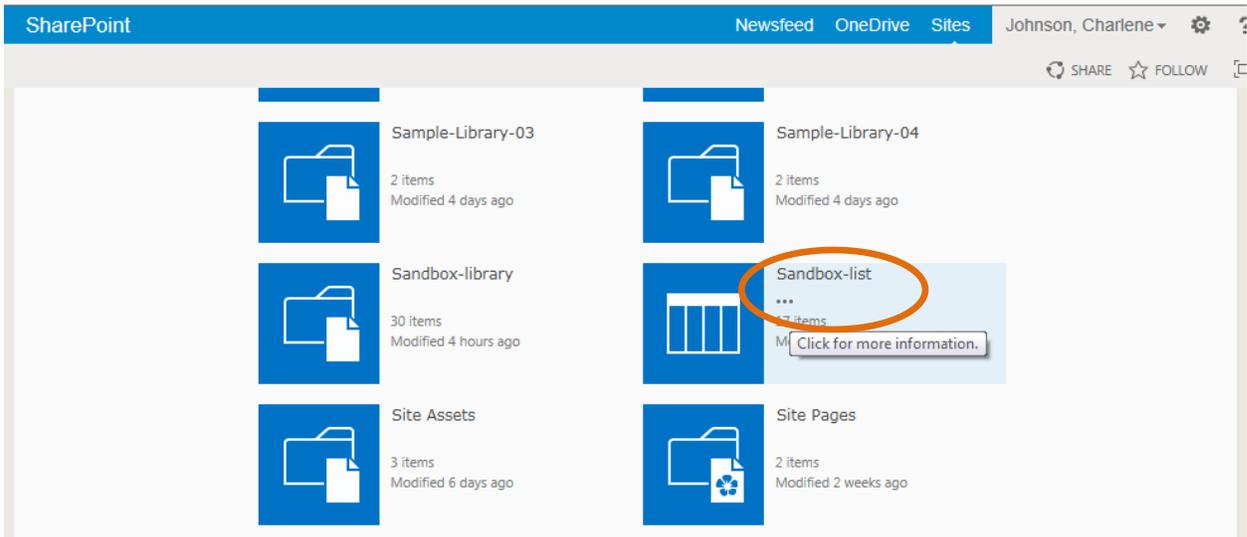


Figure 7 The ellipses when you hover over the list name

6. SharePoint will display a pop up
7. On the pop up, click **Settings**

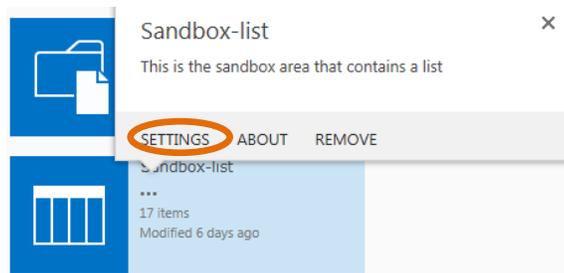


Figure 8 Settings option when the pop up is displayed

8. SharePoint will display the **Settings** page for the list

## 4.0 Apply Your Knowledge Exercises: List Settings

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### 4.1 View List Settings

To view the **List Settings**,

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Training Sandbox
2. On the Quick Launch, select **Sandbox-list**
3. On the control tabs above the gold bar, select **LIST**
4. SharePoint will display the **List Ribbon**
5. On the **List Ribbon**, click **List Settings**
6. SharePoint will display the **Settings**

## 5.0 New List

---

A list is a container for information. Lists are similar to a simple database or spreadsheet. In SharePoint 2013 you can create several different types of lists including:

- Announcement List
- Contact List
- Custom List
- Issue Tracking List
- Survey List

### 5.1 Create a new List

When you want to create a list, you will need to make sure you have permission to **Add an App**. After navigating to the page where you want to add the list, you will create the list by adding the appropriate app. There are several types of lists you can choose from. Some of the most popular lists are:

- Contacts List
- Custom List
- Issue Tracking List
- Task List

To add a list,

1. Navigate to the page where you want to add a list
2. Click the gear  and a drop down will display
3. On the drop down, click **Add an app**

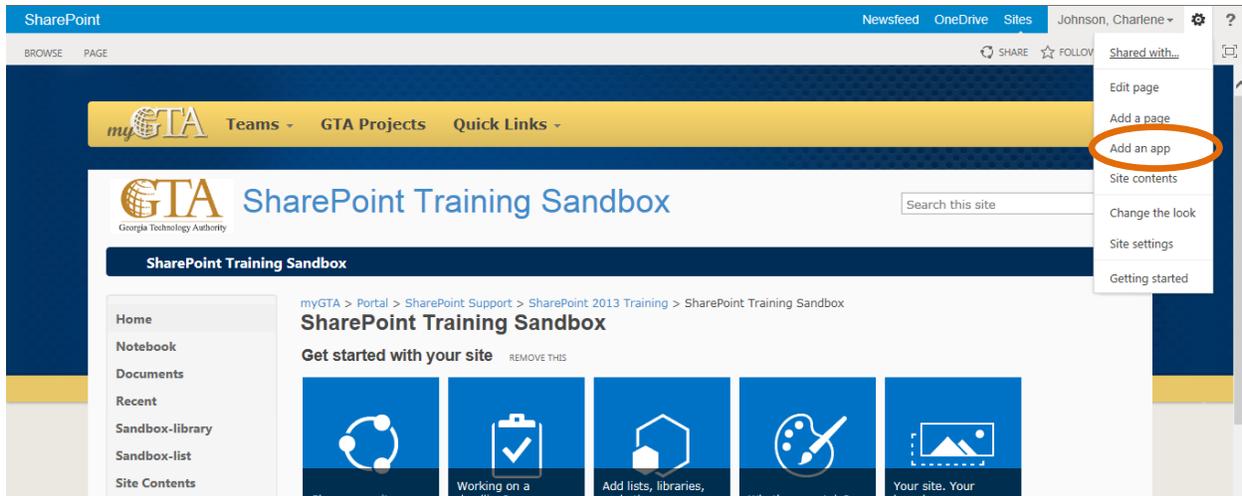


Figure 9 Add an app when you click the gear

4. SharePoint will display one or more pages that contain app tiles.
5. Scroll through the app tiles until you find the list app you want to use and then click on it.

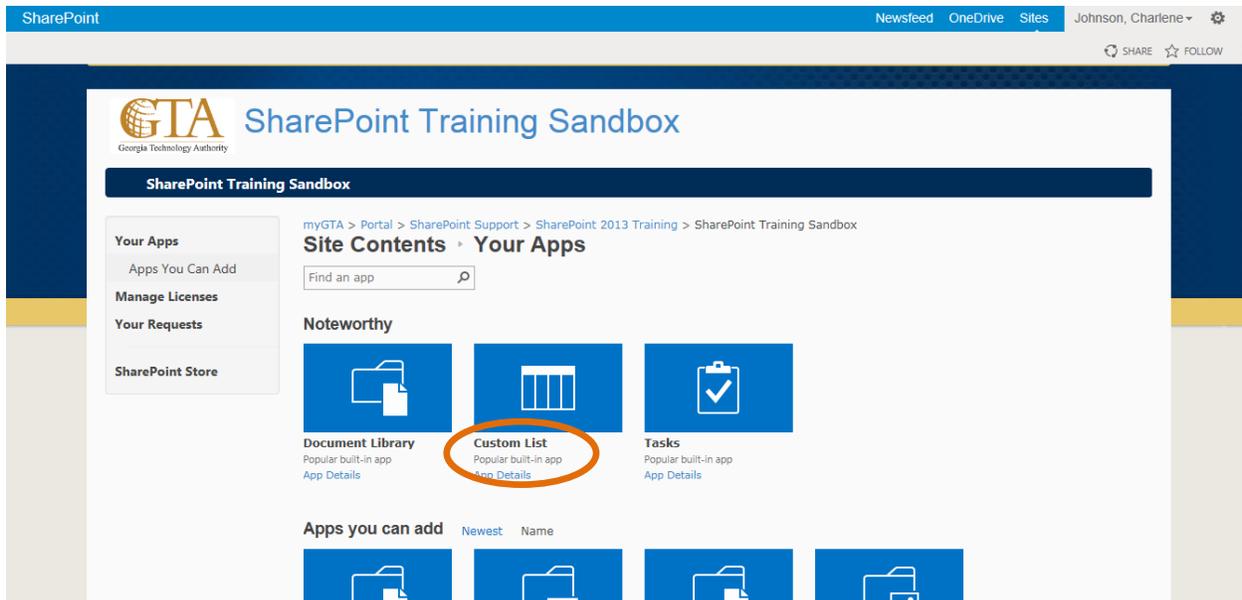


Figure 10 List app when you scroll through the app tiles

6. SharePoint will display the **Adding List** pop up
7. Enter the **Name** for the list and click **Create**

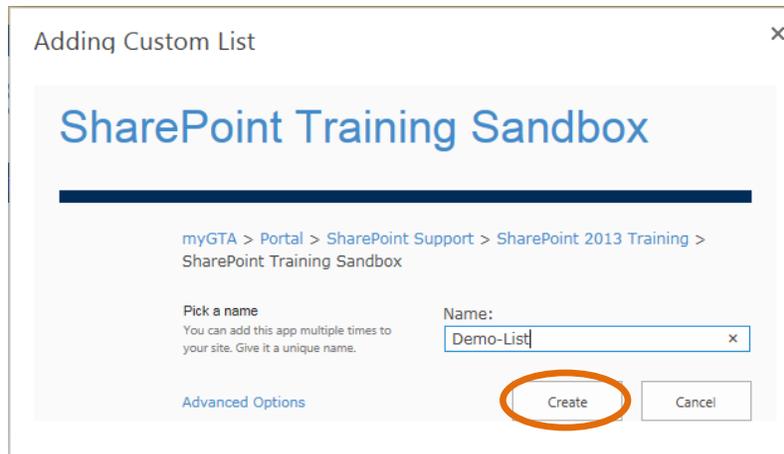


Figure 11 Adding List pop up when you click on the Custom List tile

8. SharePoint will create the library and store it in the **Site Contents**

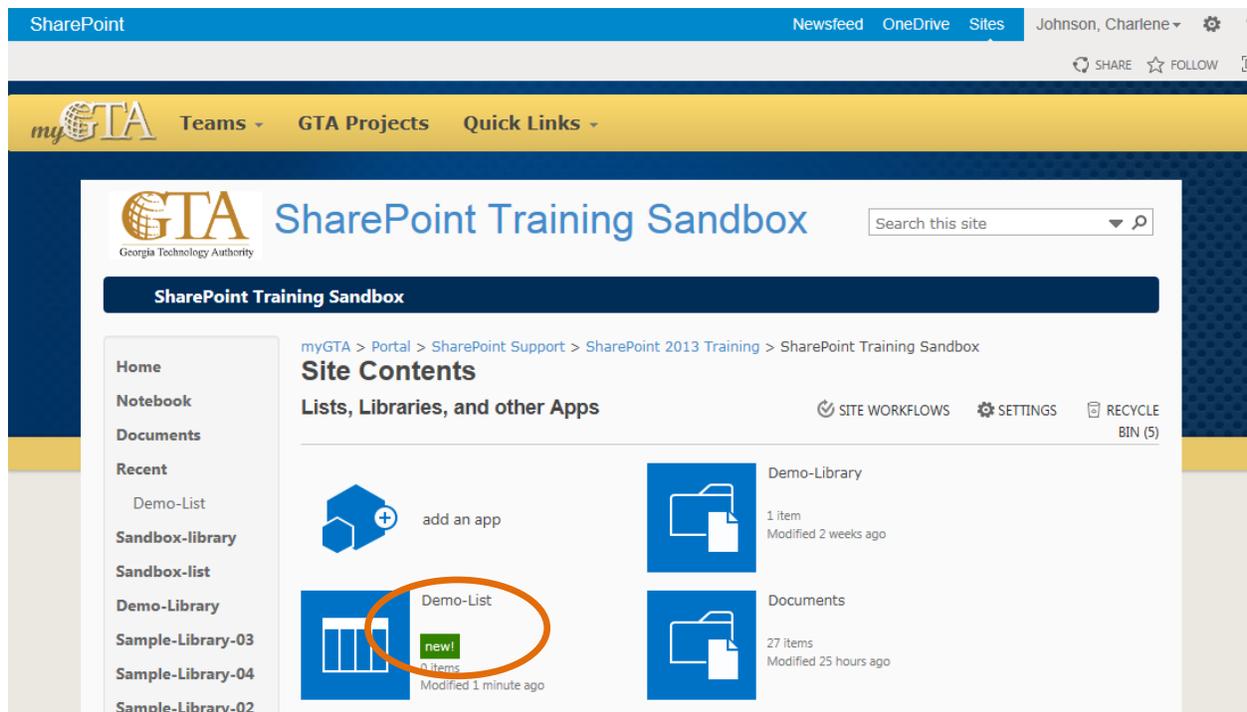


Figure 12 New Custom List in Site Contents when you created it

## 6.0 Apply Your Knowledge Exercises: New List

---

### 6.1 Create an Announcement List

You can add a list of announcements.

To add an announcement list,

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
2. Click the gear  and a drop down will display
3. On the drop down, click **Add an app**
4. SharePoint will display one or more pages that contain app tiles.
5. Scroll through the app tiles until you find **Announcements** and then click on it.
6. SharePoint will display the **Adding Announcements** pop up
7. Enter the **Name** for the list and the expiration date, then click **Create**
8. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
9. Click **Site Contents**
10. Scroll through the tiles to find your new list and then click on the **List Name** to display the list

### 6.2 Create a Custom List

You can add a custom list.

To add a custom list,

11. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
12. Click the gear  and a drop down will display
13. On the drop down, click **Add an app**
14. SharePoint will display one or more pages that contain app tiles.
15. Scroll through the app tiles until you find **Custom List** and then click on it.
16. SharePoint will display the **Adding Custom List** pop up
17. Enter the **Name** for the list and click **Create**
18. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
19. Click **Site Contents**

20. Scroll through the tiles to find your new list and then click on the **List Name** to display the list

## 6.3 Create a Task List

You can add a task list.

To add a task list,

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
2. Click the gear  and a drop down will display
3. On the drop down, click **Add an app**
4. SharePoint will display one or more pages that contain app tiles.
5. Scroll through the app tiles until you find **Tasks** and then click on it.
6. SharePoint will display the **Adding Tasks** pop up
7. Enter the **Name** for the list and click **Create**
8. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
9. Click **Site Contents**
10. Scroll through the tiles to find your new list and then click on the **List Name** to display the list

## 6.4 Create an Issues List

An issues list is used to log, assign and track the status of issues. You can add an issues list.

To add an issues list,

11. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
12. Click the gear  and a drop down will display
13. On the drop down, click **Add an app**
14. SharePoint will display one or more pages that contain app tiles.
15. Scroll through the app tiles until you find **Issue Tracking** and then click on it.
16. SharePoint will display the **Adding Custom List** pop up
17. Enter the **Name** for the list and click **Create**
18. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
19. Click **Site Contents**

20. Scroll through the tiles to find your new list and then click on the **List Name** to display the list

## 6.5 Create an Contact List

You can add a contacts list.

To add a contacts list,

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
2. Click the gear  and a drop down will display
3. On the drop down, click **Add an app**
4. SharePoint will display one or more pages that contain app tiles.
5. Scroll through the app tiles until you find **Contacts** and then click on it.
6. SharePoint will display the **Adding Contacts** pop up
7. Enter the **Name** for the list and click **Create**
8. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
9. Click **Site Contents**
10. Scroll through the tiles to find your new list and then click on the **List Name** to display the list

## 7.0 Work with Columns

---

Lists are similar to a very simple database or spreadsheet. You can customize a list by adding or deleting columns, or editing the format of existing columns.

### 7.1 Add a column

To add a new column,

1. Navigate to **List Settings** for the list
2. SharePoint will display the **Settings** for the list
3. From the **Columns** section of the **Settings** page, click **Create column**

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### SharePoint Training Sandbox

myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox

# Demo-List Settings

List Information  
**Name:** Demo-List  
**Web Address:** https://mygta.ga.gov/portal/spsupport/sptraining/sptrainingsandbox/Lists/DemoList/AllItems.aspx  
**Description:**

General Settings	Permissions and Management	Communications
<ul style="list-style-type: none"> <li>List name, description and navigation</li> <li>Versioning settings</li> <li>Advanced settings</li> <li>Validation settings</li> <li>Audience targeting settings</li> <li>Rating settings</li> <li>Form settings</li> <li>Catalog Settings</li> </ul>	<ul style="list-style-type: none"> <li>Delete this list</li> <li>Save list as template</li> <li>Permissions for this list</li> <li>Workflow Settings</li> <li>Generate file plan report</li> <li>Enterprise Metadata and Keywords Settings</li> <li>Information management policy settings</li> </ul>	

**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
Title	Single line of text	✓
Demo-Category	Choice	
Modified	Date and Time	
Created	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	

**Create column**

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

**Views**  
A view of a list allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently configured for this list:

View (click to edit)	Default View	Mobile View	Default Mobile View
All Items	✓	✓	✓

Create view

Figure 13 Settings page when you want to select Create columns

- SharePoint will display the **Create Columns** page for the list
- Enter a **Column Name** and select the column options you want the list to have
- Then click **OK**

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## SharePoint Training Sandbox

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### Settings > 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:

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)
- Task Outcome
- 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:

Default value:  
 Text  Calculated Value

Add to default view

[Column Validation](#)

Figure 14 Create Column page when you want to create a new column

## 7.2 Edit a column

You can edit a column and change the type of information or the format. If you have a **Choice** type of column, the column will have a table of values the user can select and you can modify the table of values as needed.

**Note:** Be careful when making changes to the columns, because SharePoint will not revise existing data. You will need to manually adjust all data as needed.

To edit a column,

1. Navigate to **List Settings** for the list
2. SharePoint will display the **Settings** for the list
3. From the **Columns** section of the **Settings** page, click the name of the column that you want to change

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## SharePoint Training Sandbox

myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox

### Demo-List Settings

List Information  
**Name:** Demo-List  
**Web Address:** https://mygta.ga.gov/portal/spsupport/sptraining/sptrainingsandbox/Lists/DemoList/AllItems.aspx  
**Description:**

General Settings Permissions and Management Communications

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Audience targeting settings
- Rating settings
- Form settings
- Catalog Settings
- 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 columns are currently available in this list:

Column (click to edit)	Type	Required
<b>Title</b>	Single line of text	✓
Demo-Category	Choice	
Modified	Date and Time	
Created	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	

Create column  
 Add from existing site columns  
 Column ordering  
 Indexed columns

Views  
 A view of a list allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently configured for this list:

View (click to edit)	Default View	Mobile View	Default Mobile View
All Items	✓	✓	✓

Create view

Figure 15 Columns when you want to modify existing column values

- SharePoint will display the **Settings > Edit Column** page for the column
- Edit the column information that is displayed on the page, as needed
- Then click **OK**

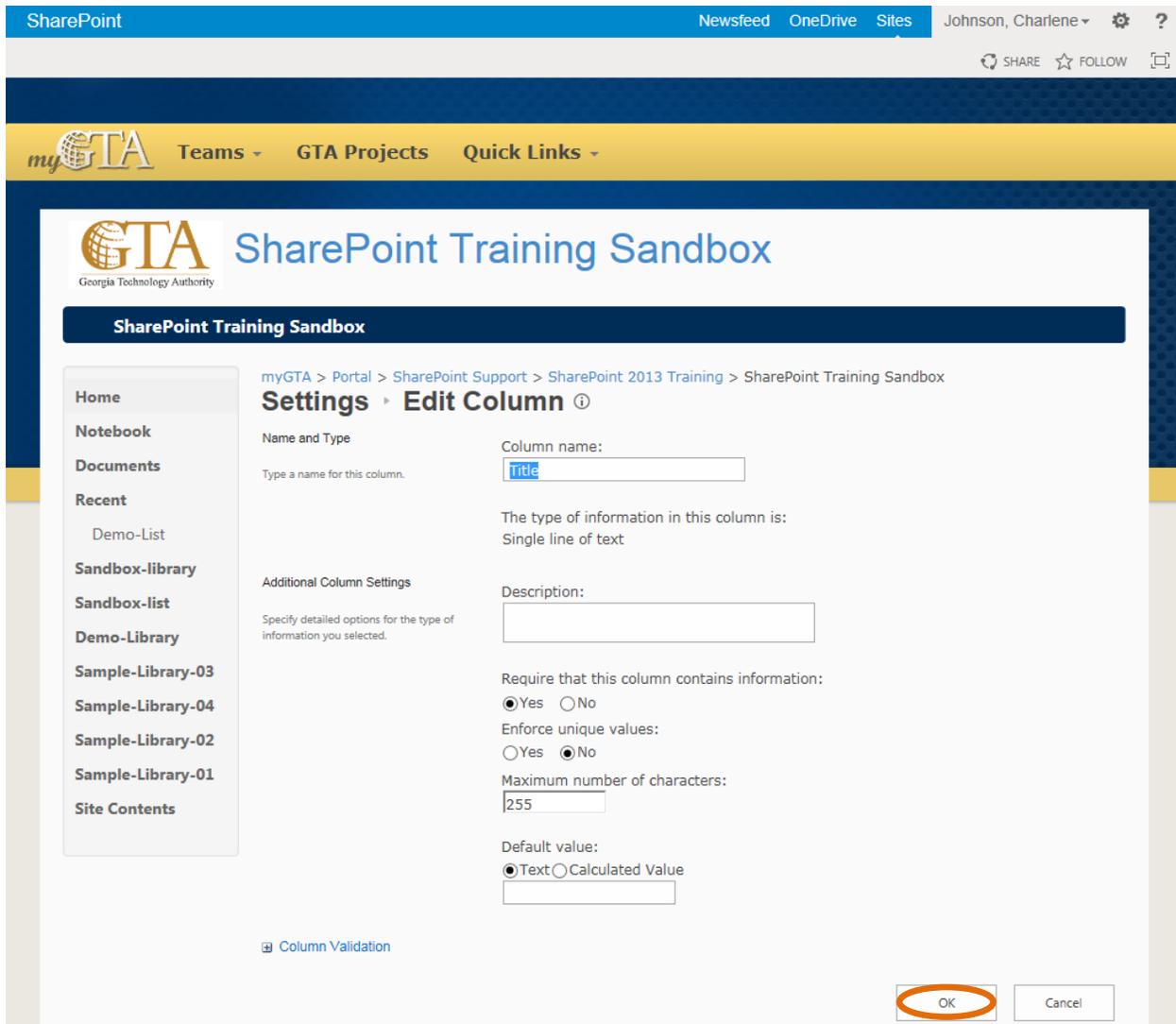


Figure 16 Column Information when you want to modify an existing column

### 7.3 Delete a column

You can delete a column.

**Note:** When a column is deleted, it cannot be restored. It is permanently deleted.

To delete a column,

1. Navigate to **List Settings** for the list
2. SharePoint will display the **Settings** for the list
3. From the **Columns** section of the **Settings** page, click the name of the column you want to delete

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**Demo-List** > **Settings**

List Information  
**Name:** Demo-List  
**Web Address:** https://mygta.ga.gov/portal/spsupport/sptraining/sptrainingsandbox/Lists/DemoList/AllItems.aspx  
**Description:**

General Settings Permissions and Management Communications

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Audience targeting settings
- Rating settings
- Form settings
- Catalog Settings
- 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 columns are currently available in this list:

Column (click to edit)	Type	Required
<a href="#">Title</a>	Single line of text	✓
<a href="#">Demo-Category</a>	Choice	
<a href="#">Modified</a>	Date and Time	
Created	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	

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

Views  
 A view of a list allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently configured for this list:

View (click to edit)	Default View	Mobile View	Default Mobile View
All Items	✓	✓	✓

- Create view

Figure 17 Columns when you want to select a column and delete it

- SharePoint will display the **Settings > Edit Column** page for the list
- Click the **Delete** button at the bottom of the page

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**SharePoint Training Sandbox**

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**Settings** ▸ **Edit Column** ⓘ

**Name and Type**

Type a name for this 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

**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

Type each choice on a separate line:

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](#)

Figure 18 Edit Column when you want to select a column and delete it

6. SharePoint will display a confirmation box
7. Confirm the delete, by clicking **OK** and SharePoint will delete the column

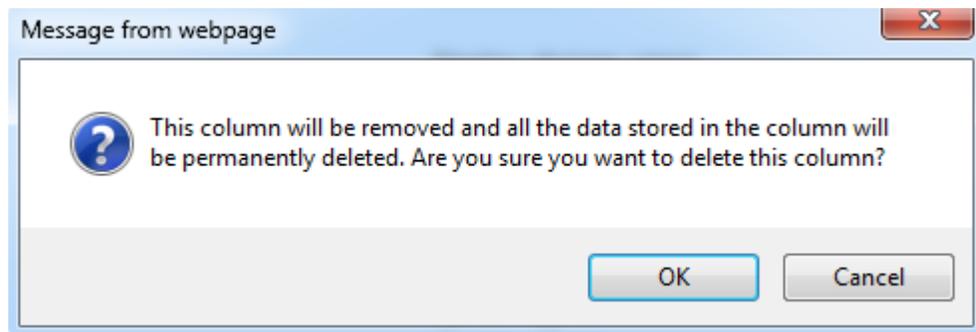


Figure 19 Confirmation box when you want to delete a column

## 8.0 Apply Your Knowledge Exercises: List Columns

---

### 8.1 Add a Column

You can add a column to a list.

To add a column to a list,

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
2. Click on the announcement list name using **Quick Launch** and SharePoint will display the announcement list you created
3. Click the **LIST** control tab
4. SharePoint will display the list ribbon
5. On the ribbon, click **List Settings**
6. SharePoint will display the **Settings** page for the list
7. From the **Columns** section of the **Settings** page, click **Create column**
8. SharePoint will display the **Create Columns** page for the list
9. Enter the following information:
  - a. **Column name:** Effective
  - b. Click the button for **Date and Time**
  - c. **Description:** The effective date of the announcement
  - d. **Yes, for Require that this column contains information**
  - e. Then click **OK**
10. SharePoint will add the column to the list

## 8.2 Edit a Column

You can edit a column.

To edit a column,

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
2. Click on the announcement list name using **Quick Launch** and SharePoint will display the announcement list you created
3. Click the **LIST** control tab
4. SharePoint will display the list ribbon
5. On the ribbon, click **List Settings**
6. SharePoint will display the **Settings** page for the list
7. From the **Columns** section of the **Settings** page, click the name of the column that you want to change: Effective
8. Change **The type of information in this column is:** to: Choice (menu to choose from)
9. Add the following choices:
  - a. **Choice #1:** Select One
  - b. **Choice #2:** Qtr 1
  - c. **Choice #3:** Qtr 2
  - d. **Choice #4:** Qtr 3
  - e. **Choice #5:** Qtr 4
10. Then click **OK**
11. SharePoint will retain the new format for the column

## 8.3 Delete a Column

You can delete a column.

To delete a column,

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
2. Click on the announcement list name using **Quick Launch** and SharePoint will display the announcement list you created
3. Click the **LIST** control tab
4. SharePoint will display the list ribbon
5. On the ribbon, click **List Settings**
6. SharePoint will display the **Settings** page for the list

7. From the **Columns** section of the Settings page, click the name of the column you want to delete: Effective
8. SharePoint will display the **Settings > Edit Column** page for the list
9. Click the **Delete** button at the bottom of the page
10. SharePoint will display a confirmation box
11. Confirm the delete, by clicking **OK** and SharePoint will delete the column

## 9.0 Work with Views

---

A view is the formatted display of information. SharePoint offers several views that can be used with lists. You can modify existing views or create new ones.

### 9.1 Create a View

You can create a view that is public or private. You can also set any public view as the default view that will be displayed whenever the page is accessed.

To create a view,

1. Navigate to **List Settings** for the list
2. SharePoint will display the **Settings** for the list
3. At the bottom of the Settings page, click **Create a View**

**Note:** You can also create a view by navigating to the list ribbon and clicking on **Create View** from the ribbon.

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GTA Georgia Technology Authority SharePoint Training Sandbox

SharePoint Training Sandbox

myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox

**Demo-List > Settings**

List Information  
**Name:** Demo-List  
**Web Address:** https://mygta.ga.gov/portal/spsupport/sptraining/sptrainingsandbox/Lists/DemoList/AllItems.aspx  
**Description:**

General Settings Permissions and Management Communications

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Audience targeting settings
- Rating settings
- Form settings
- Catalog Settings
- 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 columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
Demo-Category	Choice	
Modified	Date and Time	
Created	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	

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

Views  
 A view of a list allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently configured for this list:

View (click to edit)	Default View	Mobile View	Default Mobile View
All Items	✓	✓	✓
<b>Create view</b>			

Figure 20 Settings > Edit View page when you want to create a view

- SharePoint will display the **Settings > View Type** page
- Select the type of view you want to create, by clicking on it. The type of view you select will be used as a template for the view you are creating.

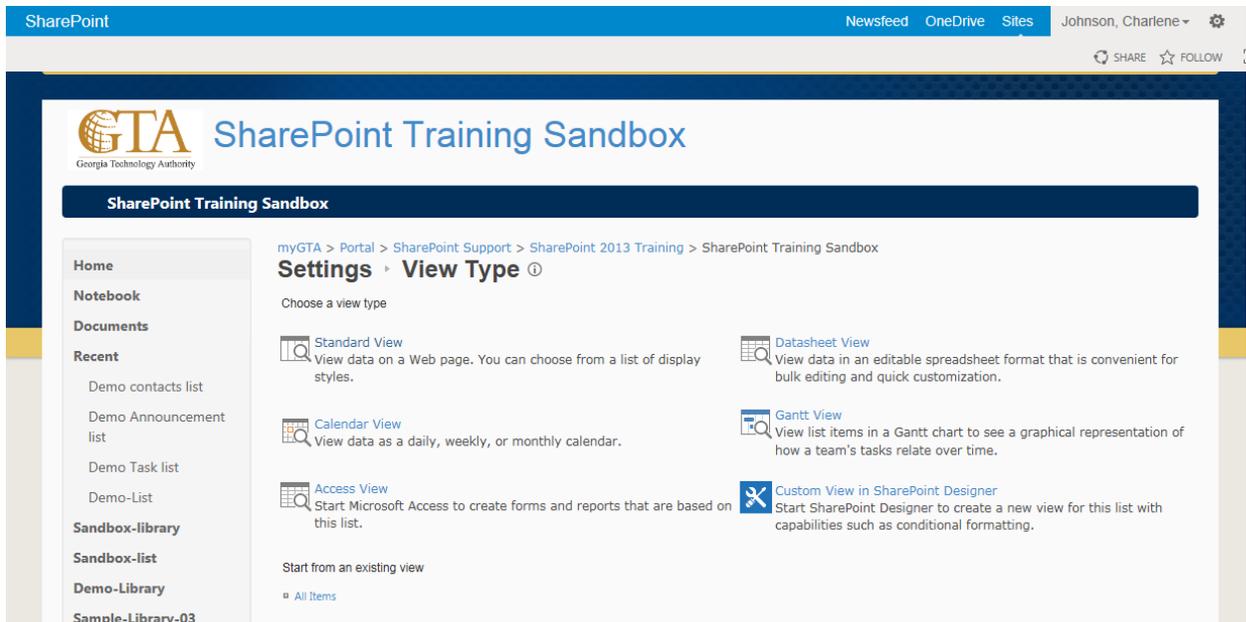


Figure 21 Settings> View Type page when you want to create a view

6. SharePoint will display the **Settings > Create View** page
7. Enter the **View Name** and select the options for the view you want to create
8. Then click **Create** and SharePoint will create the view

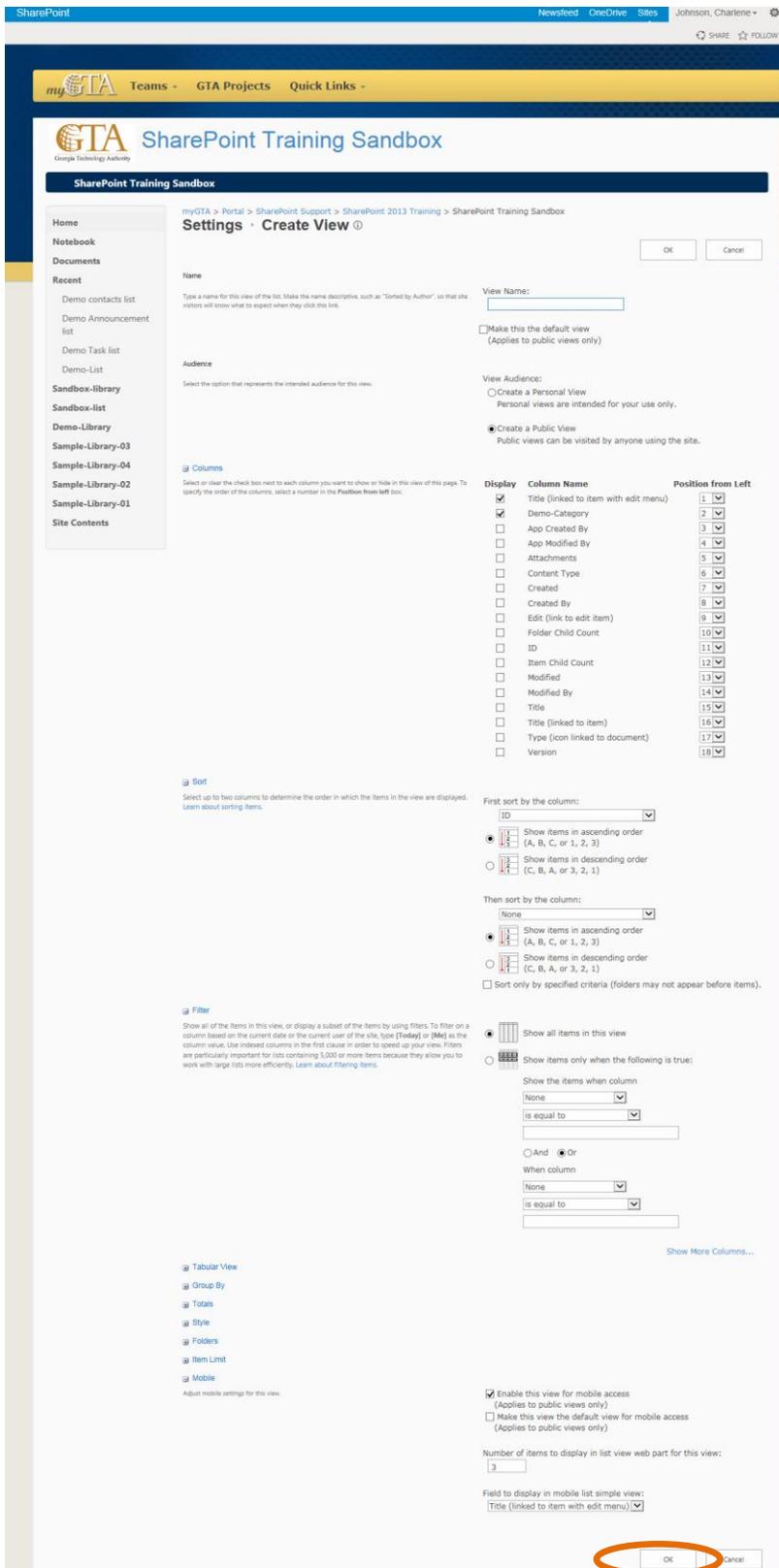


Figure 22 Settings> Create View page when you want to name the view and select the options

## 9.2 Modify a View

You can modify a view by changing the order, hiding or displaying columns. You can also use sorts, filters and groups to modify a view.

To modify a view,

1. Navigate to **List Settings** for the list
2. SharePoint will display the **Settings** for the list
3. At the bottom of the Settings page, select the view you want to modify by clicking on it

**Note:** You can also modify a view by navigating to the list ribbon and clicking on Modify View from the ribbon.

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## SharePoint Training Sandbox

myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox

### Demo-List Settings

List Information  
**Name:** Demo-List  
**Web Address:** https://mygta.ga.gov/portal/spsupport/sptraining/sptrainingsandbox/Lists/DemoList/AllItems.aspx  
**Description:**

General Settings Permissions and Management Communications

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Audience targeting settings
- Rating settings
- Form settings
- Catalog Settings
- 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 columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
Demo-Category	Choice	
Modified	Date and Time	
Created	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	

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

**Views**

A view of a list allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently configured for this list:

View (click to edit)	Default View	Mobile View	Default Mobile View
All Items	✓	✓	✓

- Create view

Figure 23 Settings page when you want to select a view

- SharePoint will display the **Settings > Edit View**
- Modify the view as desired and then click **OK**
- SharePoint will display the list using the modified view

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## GTA SharePoint Training Sandbox

myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox

**Settings** • **Edit View** OK Cancel

**Name**

View Name:

Web address of this view: [https://mygta.ga.gov/portal/sp/support/sptraining/sptrainingsandbox/Lists/DemoList/\\_allitems.aspx](https://mygta.ga.gov/portal/sp/support/sptraining/sptrainingsandbox/Lists/DemoList/_allitems.aspx)

This view appears by default when visitors follow a link to this list. If you want to delete this view, first make another view the default.

**Columns**

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Title (linked to item with edit menu)	1
<input checked="" type="checkbox"/>	Demo-Category	2
<input type="checkbox"/>	App Created By	3
<input type="checkbox"/>	App Modified By	4
<input type="checkbox"/>	Attachments	5
<input type="checkbox"/>	Content Type	6
<input type="checkbox"/>	Created	7
<input type="checkbox"/>	Created By	8
<input type="checkbox"/>	Edit (link to edit item)	9
<input type="checkbox"/>	Folder Child Count	10
<input type="checkbox"/>	ID	11
<input type="checkbox"/>	Item Child Count	12
<input type="checkbox"/>	Modified	13
<input type="checkbox"/>	Modified By	14
<input type="checkbox"/>	Title	15
<input type="checkbox"/>	Title (linked to item)	16
<input type="checkbox"/>	Type (icon linked to document)	17
<input type="checkbox"/>	Version	18

**Sort**

First sort by the column:

Show items in ascending order (A, B, C, or 1, 2, 3)

Show items in descending order (C, B, A, or 3, 2, 1)

Then sort by the column:

Show items in ascending order (A, B, C, or 1, 2, 3)

Show items in descending order (C, B, A, or 3, 2, 1)

Sort only by specified criteria (folders may not appear before items).

**Filter**

Show all items in this view

Show items only when the following is true:

Show the items when column  is equal to

And  Or

When column  is equal to

[Show More Columns...](#)

**Tabular View**

Group By

Totals

Style

Folders

Item Limit

Mobile

Adjust mobile settings for this view.

Enable this view for mobile access (Applies to public views only)

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

Number of items to display in list view web part for this view:

Field to display in mobile list simple view:

Web address for this mobile view: [https://mygta.ga.gov/portal/sp/support/sptraining/sptrainingsandbox/\\_layouts/15/mobile/view.aspx?List=96c5656e%2D339e%2D4543%2D8e78%2D20c3f354550ed8&View=e44cb37%2D3695%2D4ee8%2D8779%2D0a3dfc5376a0](https://mygta.ga.gov/portal/sp/support/sptraining/sptrainingsandbox/_layouts/15/mobile/view.aspx?List=96c5656e%2D339e%2D4543%2D8e78%2D20c3f354550ed8&View=e44cb37%2D3695%2D4ee8%2D8779%2D0a3dfc5376a0)

OK Cancel

Figure 24 Settings> Edit View page when you want to modify a view

## 10.0 Apply Your Knowledge Exercises: Views

---

### 10.1 Create a View using All Items

To create a view using **All Items** as a view type,

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
2. On the Quick Launch, click on the Sandbox-list
3. Click the **LIST** control tab and SharePoint will display the list ribbon
4. On the ribbon, click **List Settings**
5. SharePoint will display the **Settings** page for the list
6. At the bottom of the **Settings** page, click **Create a View**
7. SharePoint will display the **Settings > View Type** page
8. At the bottom of the page, click **Start from an existing view: All Items**
9. SharePoint will display the **Settings > Create View** page
10. Enter the **View Name:** myDemoView-xx, where xx are your initials
11. Click **OK** and SharePoint will create the view

### 10.2 Modify Columns in a View

To modify the order or visibility of columns that display in a view,

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
2. On the Quick Launch, click on the **Sandbox-list**
3. Click the ellipses that are just above the column headers and SharePoint will display a drop down
4. From the drop down, select the **myDemoView-xx** view, where xx are your initials

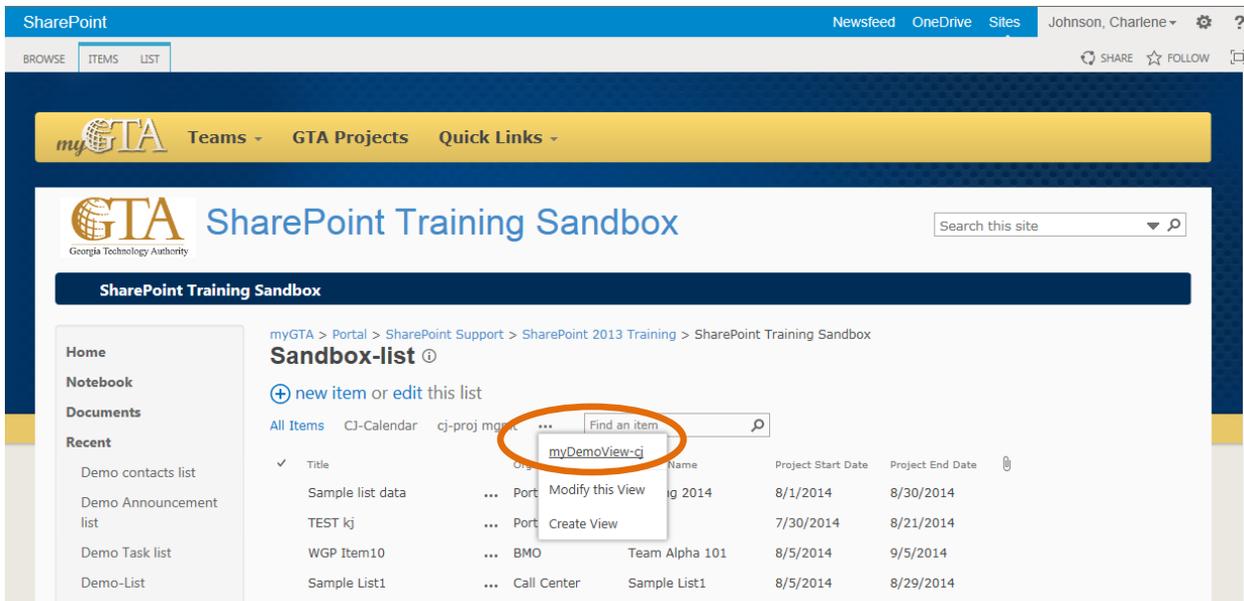


Figure 25 Ellipses when you want to select a view using the drop down

5. Click the **LIST** control tab and SharePoint will display the list ribbon
6. On the ribbon, click **Modify View**
7. SharePoint will display the **Settings > Edit View** page for the list
8. Modify the columns as follows:
  - a. Uncheck the box next to **Project End Date**
  - b. Click the box next to **ID** and set the **Position from the Left = 1**
  - c. Click the box next to **Attachments**
  - d. Then click **OK**
9. SharePoint will:
  - a. Remove the **Project End Date** column from the view
  - b. Display the **ID** column in the first position
  - c. Display the **Attachments** column

### 10.3 Modify Sorts and Filters in a View

To modify a view using sorts and filters.

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
2. On the Quick Launch, click on the **Sandbox-list**
3. Click the ellipses that are just above the column headers and SharePoint will display a drop down

4. From the drop down, select the **myDemoView-xx** view, where xx are your initials
5. Click the **LIST** control tab and SharePoint will display the list ribbon
6. On the ribbon, click **Modify View**
7. SharePoint will display the **Settings > Edit View** page for the list
8. Modify the sort as follows:
  - a. In the **Sort** area, click **First sort by the column: Organization**
  - b. In the **Filter** area, click Show the items when column:
    - i. Project Start Date
    - ii. Is greater than
    - iii. 08/01/2014
  - c. Then click **OK**
9. SharePoint will display items:
  - a. in ascending order by Organization
  - b. where the Project Start Date is after 08/01/2014

## 10.4 Modify Groups in a View

You can modify a view by changing the groups.

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
2. On the Quick Launch, click on the **Sandbox-list**
3. Click the **LIST** control tab and SharePoint will display the list ribbon
4. On the ribbon, click **List Settings**

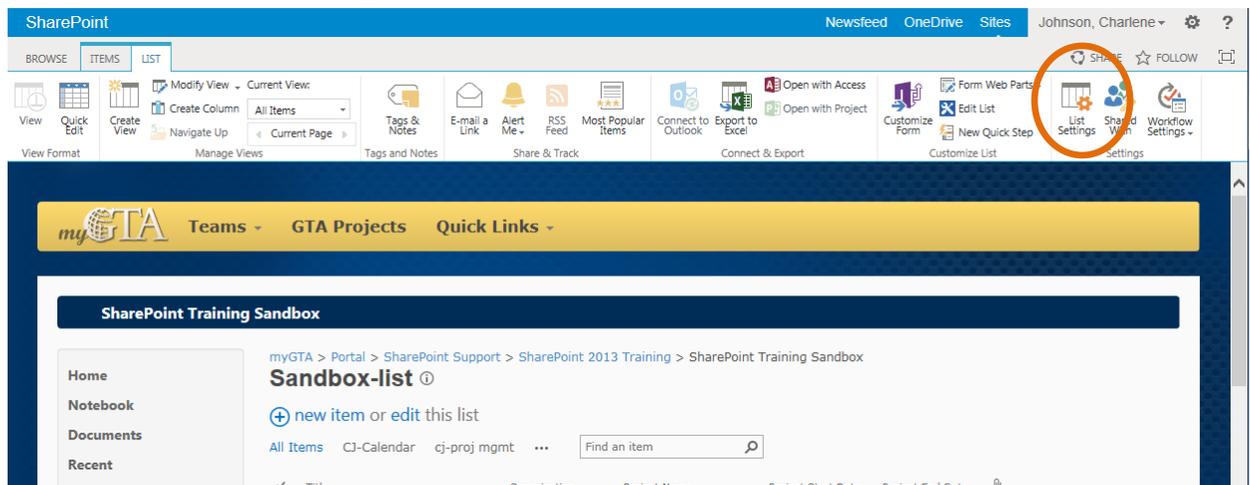


Figure 26 List Settings when you display the ribbon

- SharePoint will display the **Settings** page for the list
- Scroll down to the bottom of the page and click on the view: **myDemoView-xx** view, where xx are your initials

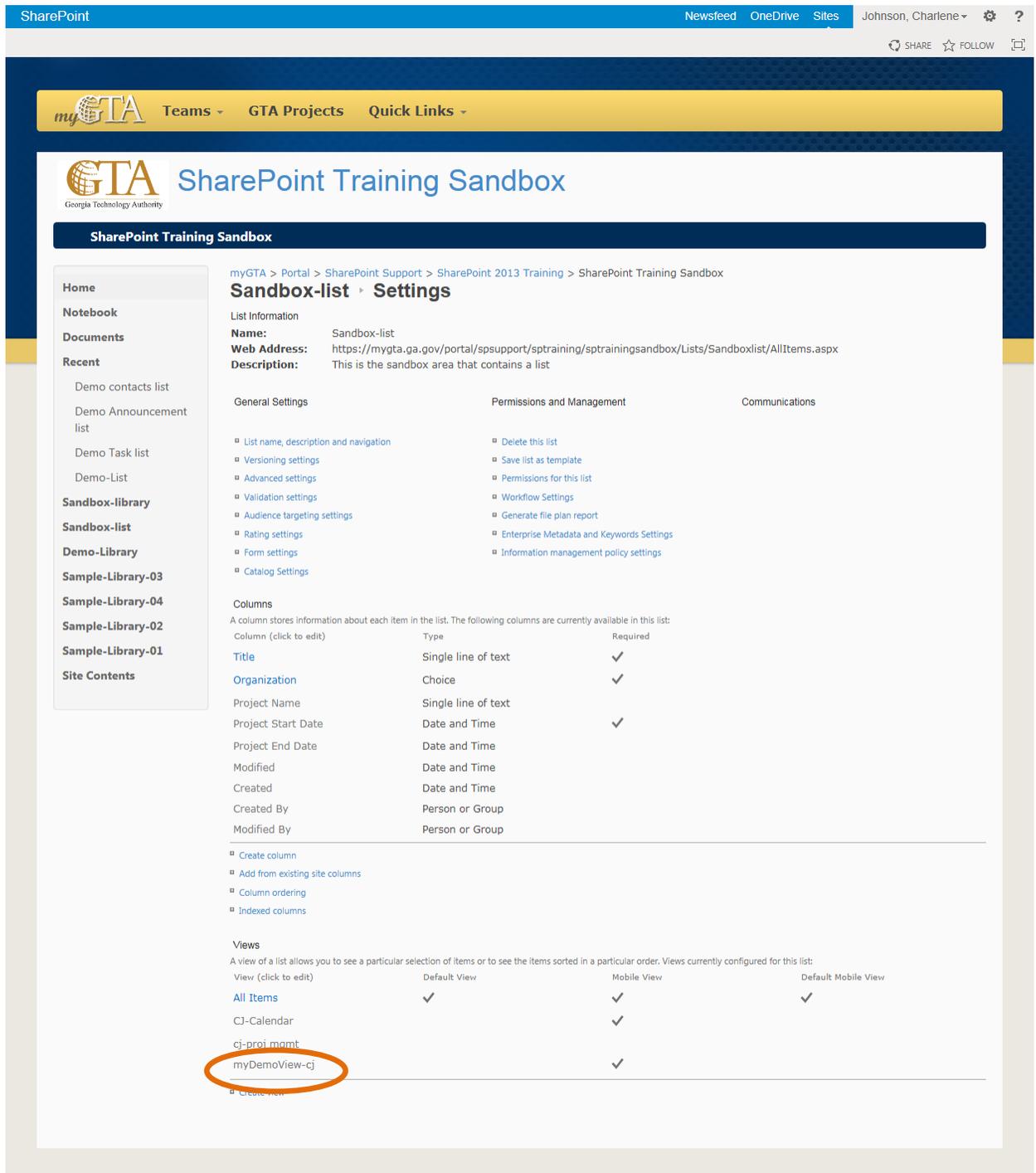


Figure 27 The available views when you want to select a view using List Settings

7. SharePoint will display the **Settings > Edit View** page for the list
8. Modify the group as follows:
  - a. Click **Group By** to expand the group area
  - b. In the **Group By** area, click **First group by the column: Organization**
  - c. Then click **OK**
9. SharePoint will display items: grouped by Organization and you can choose to expand or collapse the groups

## 10.5 Create a Gantt Chart View for a Task List

To create a Gantt Chart view,

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
2. On the Quick Launch, click on the **Demo Task list**
3. Click the **LIST** control tab and SharePoint will display the list ribbon
4. On the ribbon in the area that contains the views, click the drop down for **All Tasks**

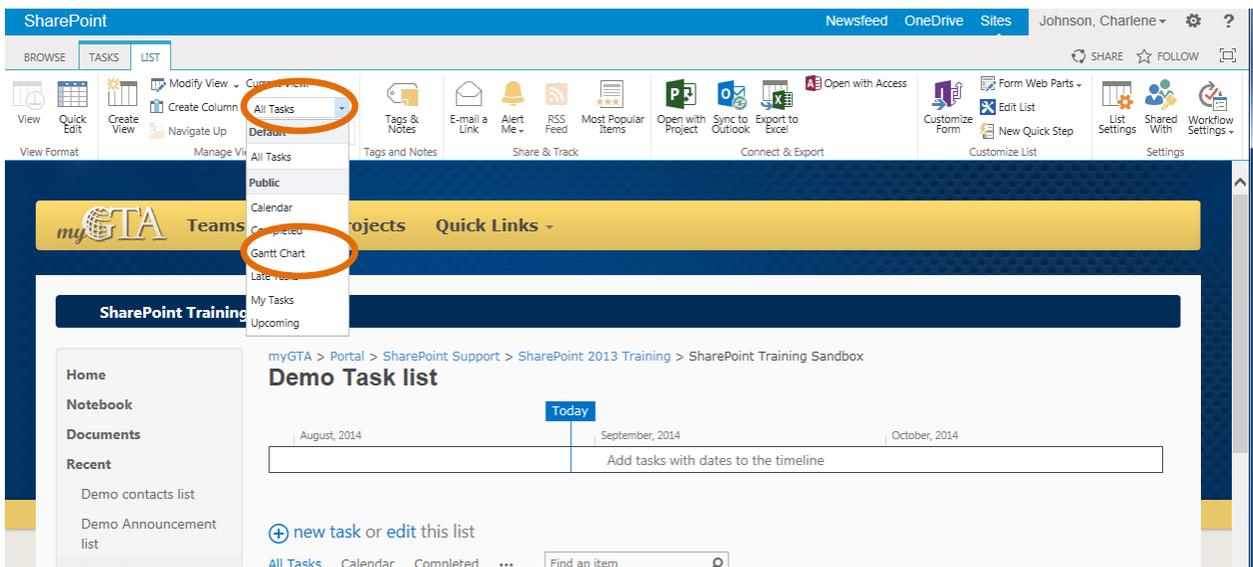


Figure 28 All Tasks when you want to select the Gantt Chart view from the drop down

5. From the drop down, click **Gantt Chart**
6. SharePoint will display the Gantt Chart view for the task list

## 10.6 Create a Calendar View for a Task List

To create a Gantt Chart view,

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
2. On the Quick Launch, click on the **Demo Task list**
3. Click the **LIST** control tab and SharePoint will display the list ribbon
4. On the ribbon, click the drop down for **All Tasks**

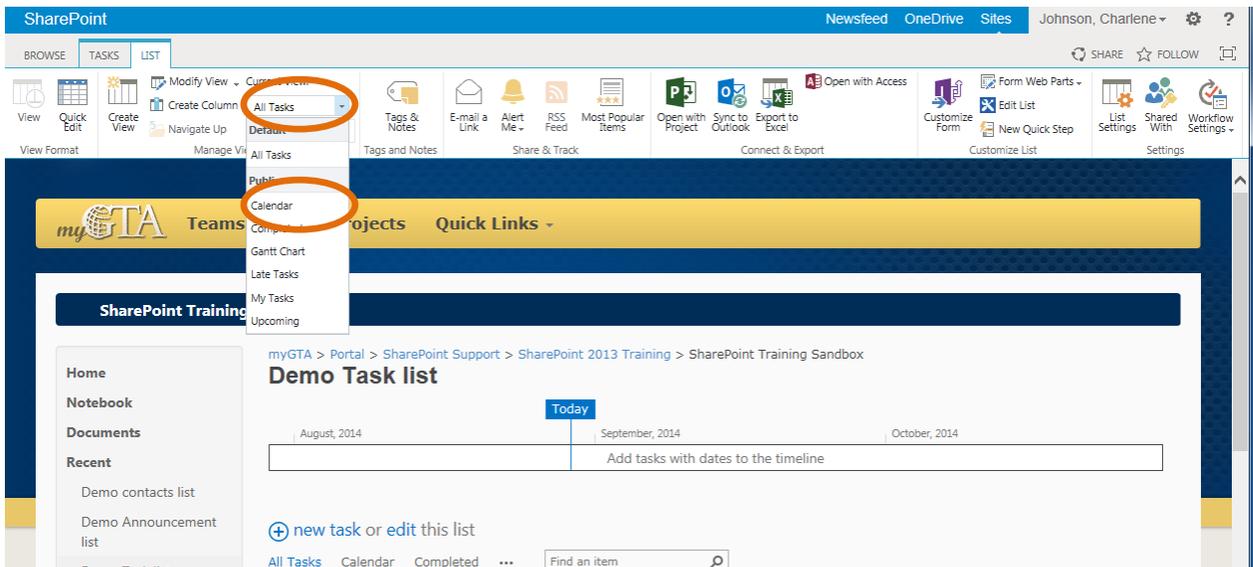


Figure 29 All Tasks when you want to select the Calendar view from the drop down

5. From the drop down, click **Calendar**
6. SharePoint will display the Calendar view for the task list

## 10.7 Create a Calendar View for a Custom List

You can create a calendar view for a custom list using date fields on the list.

**Note:** To create a calendar view, the list must have at least one date field.

To create a custom calendar view,

7. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
8. On the Quick Launch, click on the **Sandbox-list**
9. Click the **LIST** control tab and SharePoint will display the list ribbon

10. On the ribbon, click **Create View**
11. SharePoint will display the **Settings > Edit View** page for the list
12. Modify the columns as follows:
13. SharePoint will display the **Settings > View Type** page for the list
14. Click **Calendar View**
15. SharePoint will display the **Settings > Create View** page
16. Enter the **View Name: myDemoCalendar-xx**, where xx are your initials
17. Select **Time Interval**:
  - a. **Begin**
    - i. **Project Start Date**
  - b. **End**
    - i. **Project End Date**
18. Select **Calendar Columns**:
  - a. **Month View Title**
    - i. **Project Name**
  - b. **Week View Title**
    - i. **Organization**
  - c. **Week View Sub Heading**
    - i. **Project Name**
  - d. **Day View Title**
    - i. **Organization**
  - e. **Day View Sub Heading**
    - i. **Project Name**
19. Click **OK** and SharePoint will create the calendar views by day, week and month
20. Click on the **CALENDAR** tab and then select the view you want to display

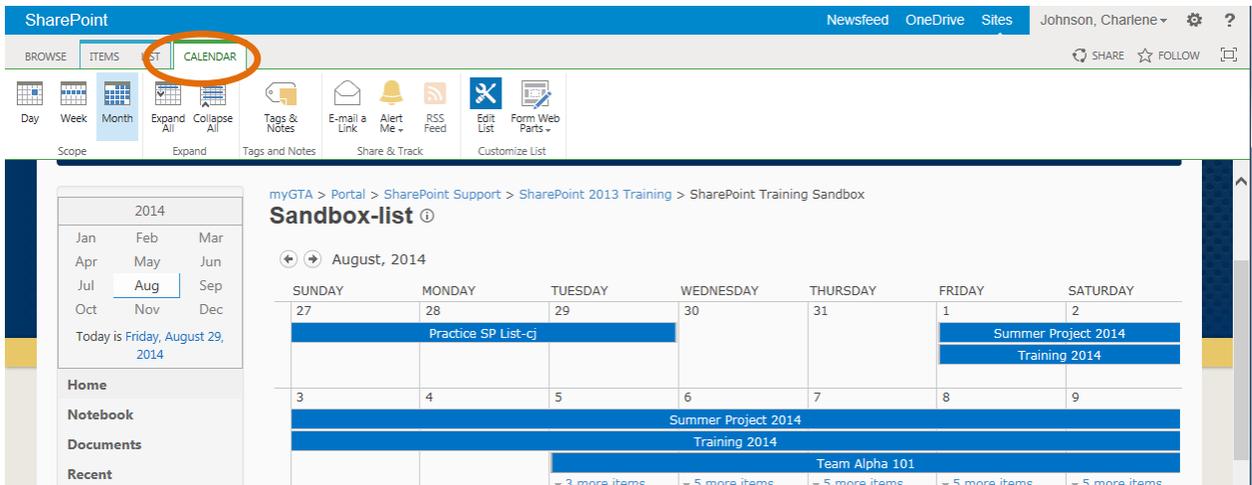


Figure 30 Calendar tab when you want to display the calendar views

## 11.0 Work with Spreadsheets

A list can be displayed in a spreadsheet view that contains rows, columns and cells. You can also import and export lists between SharePoint and Excel.

### 11.1 Spreadsheet View using Quick Edit

You can create a view using **Quick Edit**. This will allow you to work with the list using minimal spreadsheet functionality.

To create a **Quick Edit** view,

1. Navigate to the list
2. Click the **LIST** control tab and SharePoint will display the list ribbon
3. On the ribbon, click **Quick Edit**

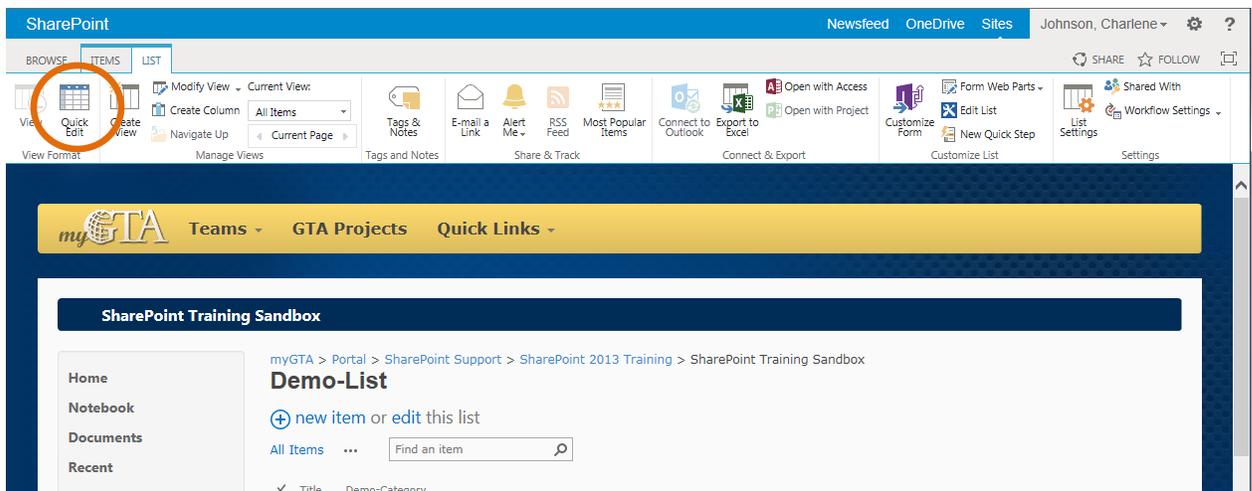


Figure 31 Quick Edit when you display the list ribbon

4. SharePoint will display the list as a spreadsheet
5. When you are finished working with the list, click Stop Editing, and SharePoint will save your changes and display the list in the standard format.

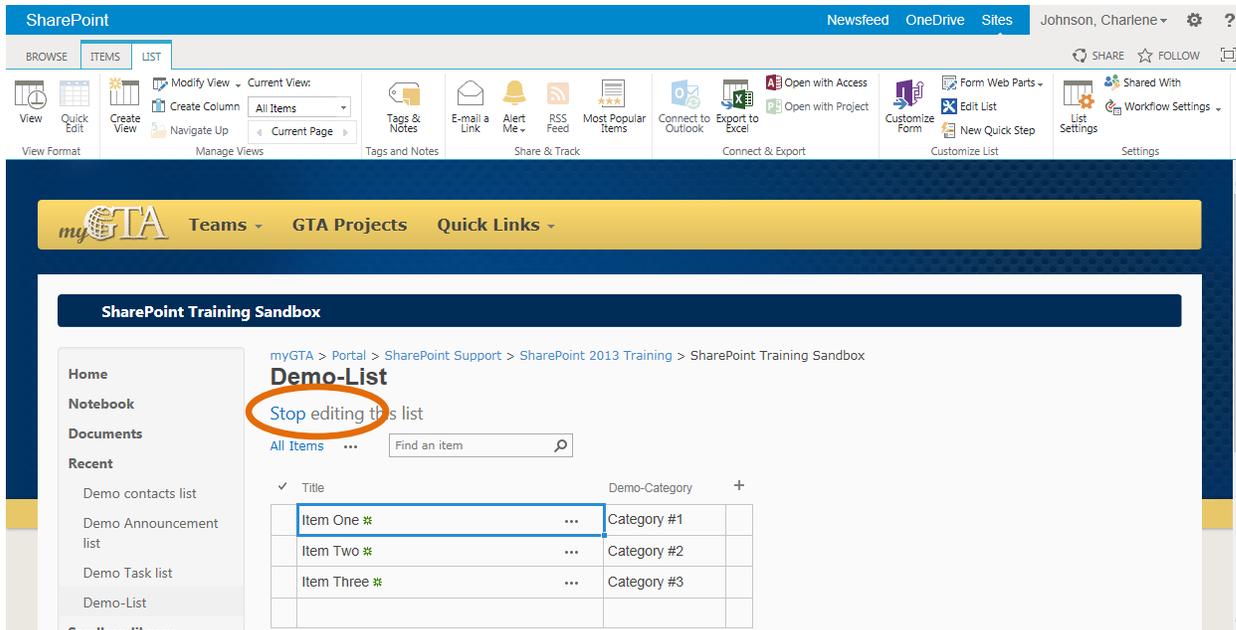


Figure 32 Quick Edit view when you want to work with the list as a spreadsheet

## 11.2 Export a List to Excel

You can export a list to Excel and then work with it using full spreadsheet functionality.

To export a list to Excel,

1. Navigate to the list
2. Click the **LIST** control tab and SharePoint will display the list ribbon
3. On the ribbon, click **Export to Excel**

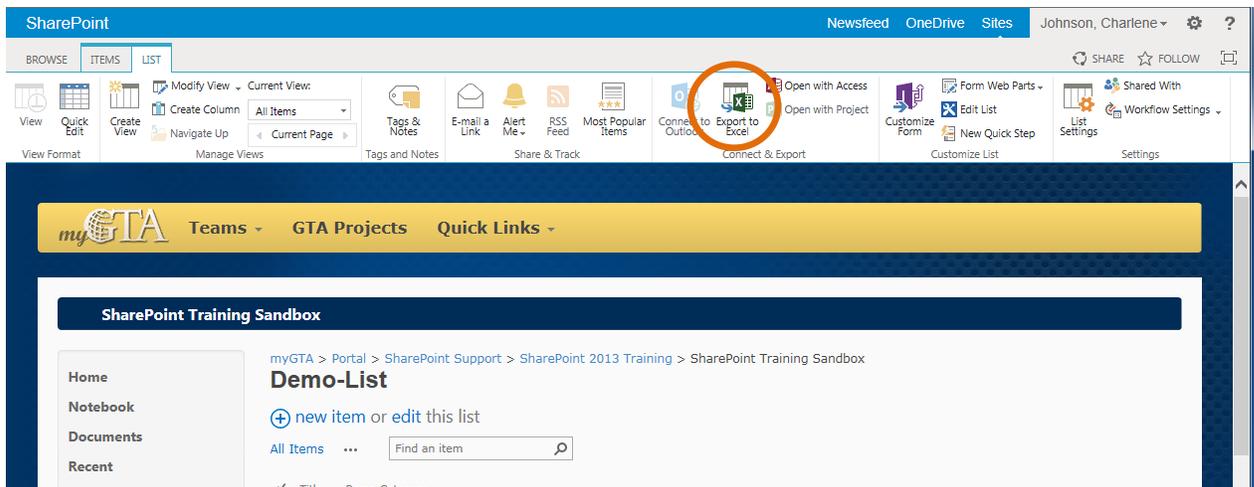


Figure 33 Export to Excel when you display the list ribbon

- SharePoint will export the list and display it as a spreadsheet by using Microsoft Excel

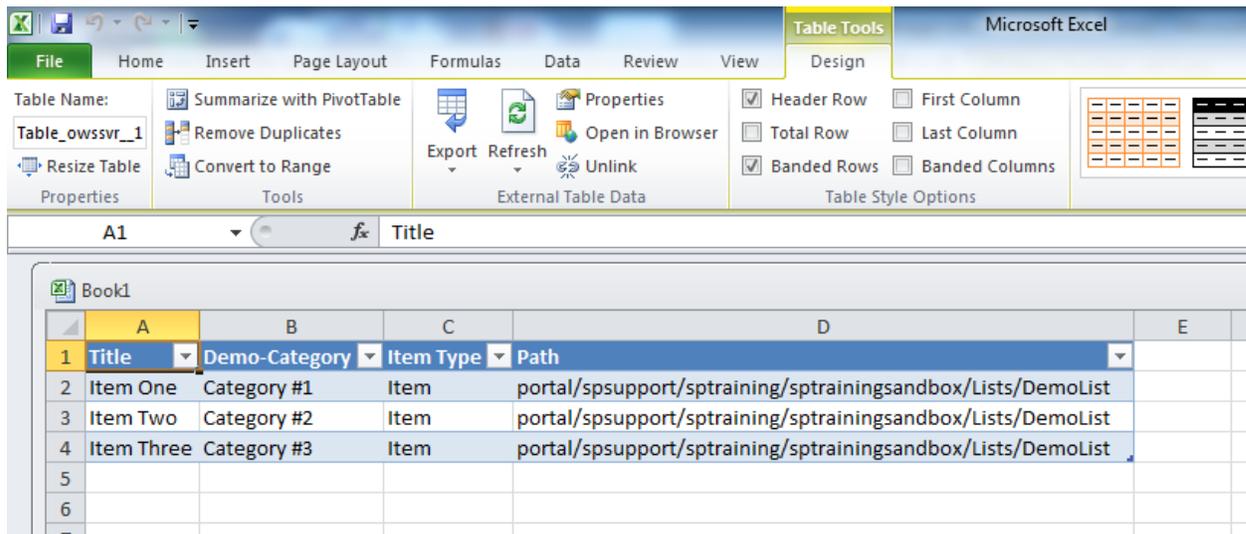


Figure 34 Excel spreadsheet when you export a list

### 11.3 Import a Spreadsheet

When you want to import a spreadsheet, you will need to make sure you have permission to **Add an App**. After navigating to the page where you want to add the spreadsheet, you will import the spreadsheet by adding the appropriate app

To import a spreadsheet,

- Navigate to **Site Contents** where you want to import the spreadsheet
- Click the gear  and a drop down will display
- On the drop down, click **Add an app**

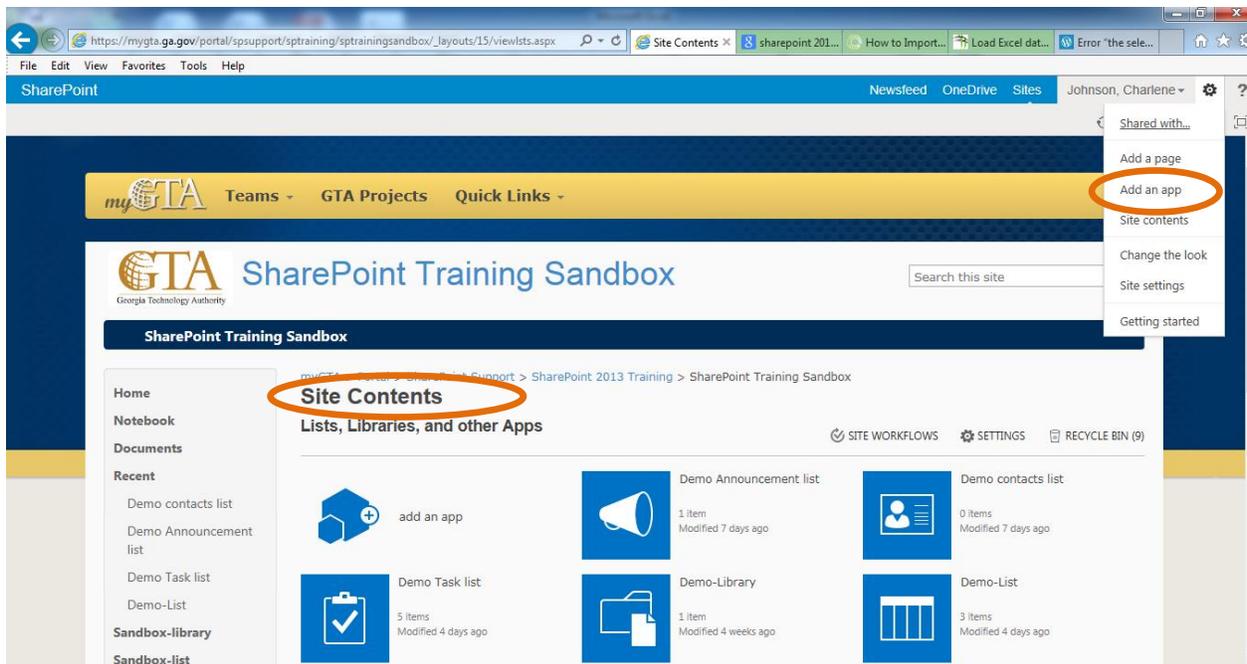


Figure 35 Add an app when you are in Site Contents and want to import a spreadsheet

4. SharePoint will display one or more pages that contain app tiles.
5. Scroll through the app tiles until you find the **Import Spreadsheet** app and then click on it.

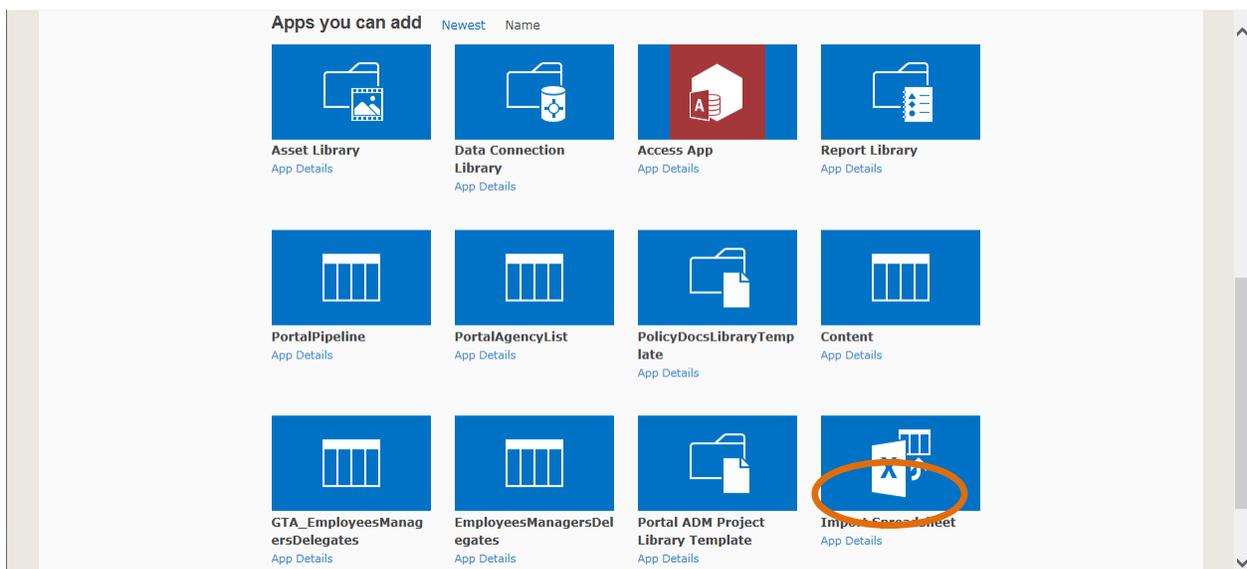


Figure 36 Import Spreadsheet app when you scroll through the app tiles

6. SharePoint will display the **Site Contents > New** page
7. Enter the **Name** and **Description** of the list you want to create and then **Browse** to locate the spreadsheet
8. After you browse for the spreadsheet, click **Insert**

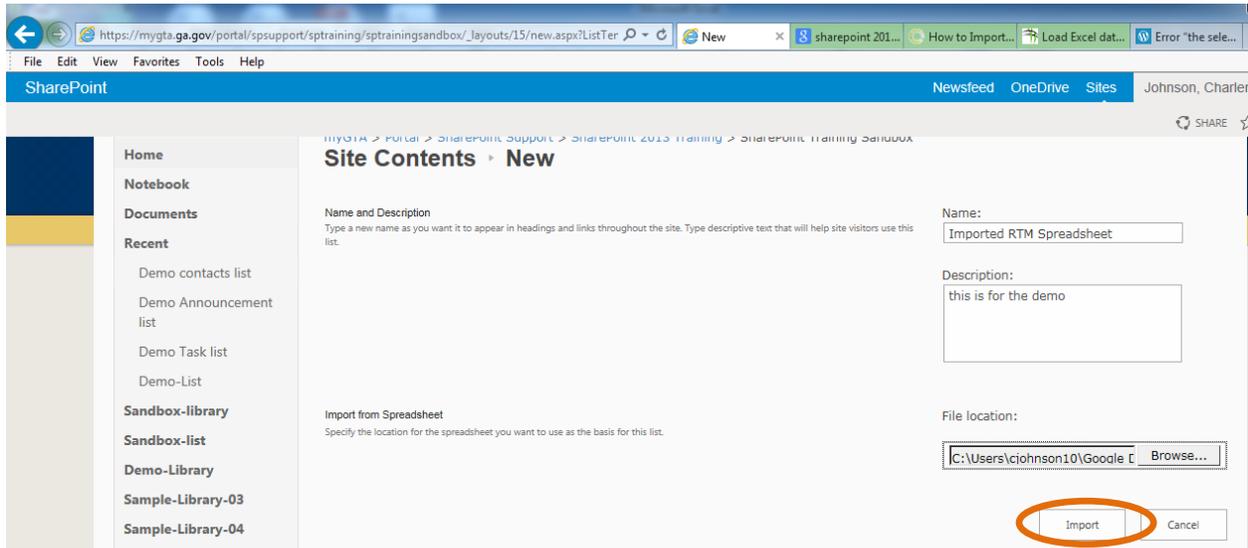


Figure 37 Site Contents > New page when you want to insert a spreadsheet

9. SharePoint will open the spreadsheet and display a pop up where you can select the range of cells you want to import:
  - a. Range of Cells
  - b. Table Range
  - c. Named Range

**Note:** The default range type is Table Range, but other options are Named Range or Range of Cells. If you haven't named the data as a range in Excel or set it as a table, select the Range of Cells option and then enter the Select Range.

10. Select the cells you want to import and then click **Import**

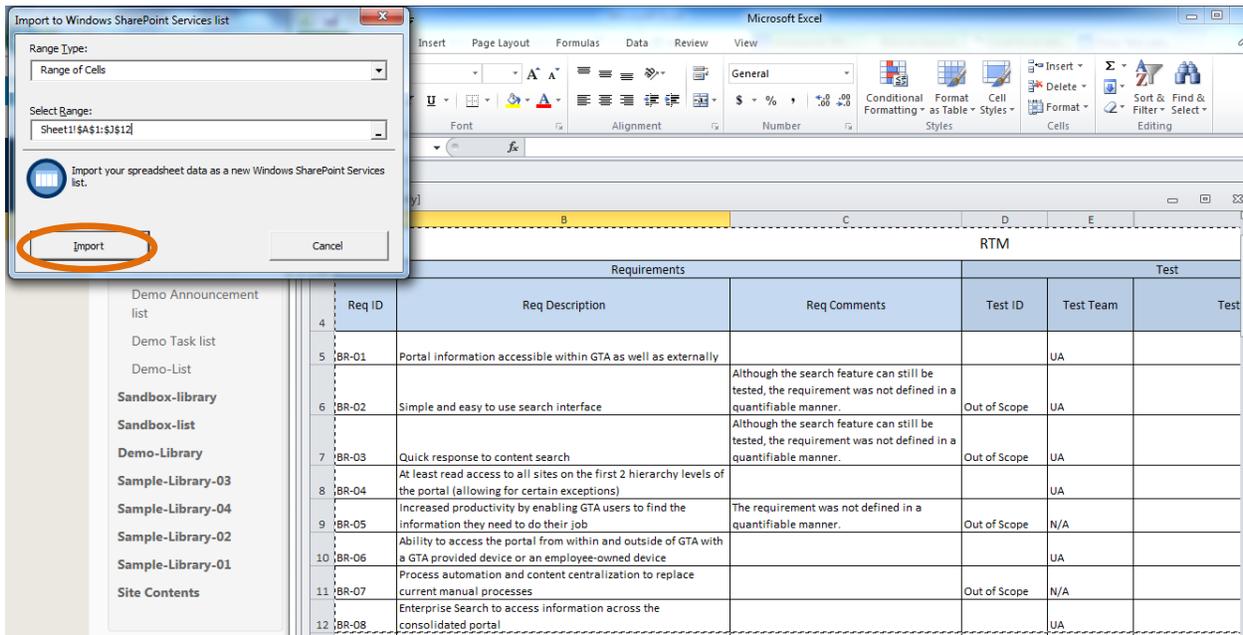


Figure 38 Pop up when you want to specify cells in a spreadsheet that you want to import

11. SharePoint will import the spreadsheet and convert it into a list in Site Contents

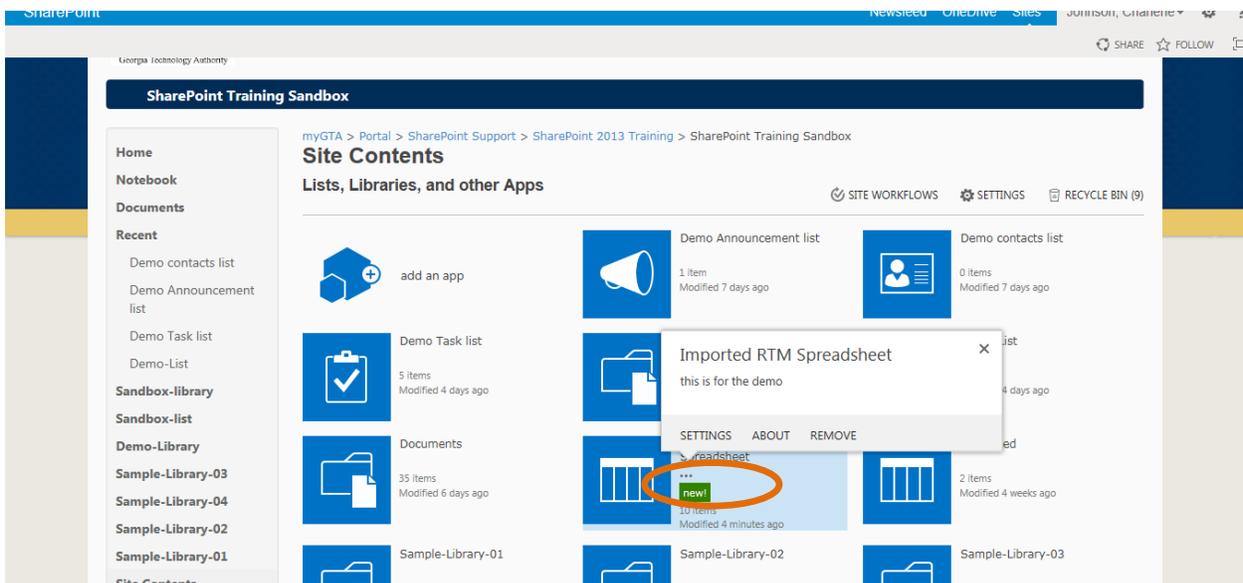


Figure 39 A new list created by SharePoint when you import a spreadsheet

## 12.0 Apply Your Knowledge Exercises: Spreadsheets

### 12.1 Spreadsheet View using Quick Edit

To create a **Quick Edit** view,

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. On the **Quick Launch**, click on the **SharePoint Training Issues**
3. Click the **LIST** control tab and SharePoint will display the list ribbon
4. On the ribbon, click **Quick Edit** and you can edit the contents
5. Click **Stop editing** to return to the standard view of the list

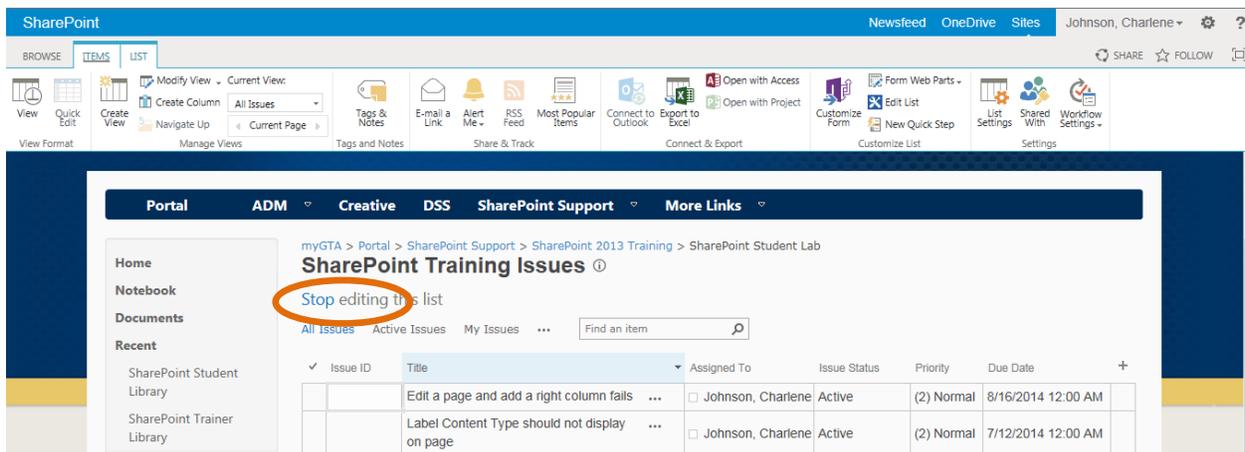


Figure 40 Stop Editing when you want to return to the default view of the list

### 12.2 Export a List to Excel

To export a list to Excel,

1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. On the **Quick Launch**, click on the **SharePoint Training Issues**
3. Click the **LIST** control tab and SharePoint will display the list ribbon
4. On the ribbon, click **Export to Excel**
5. SharePoint will export the list and display it as a spreadsheet by using Microsoft Excel

### 12.3 Import a Spreadsheet

For this exercise, you will need to have access to a spreadsheet that you can import.

To import a spreadsheet,

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1. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
2. On the Quick Launch, click on the **Site Contents**
3. Click the gear  and a drop down will display
4. On the drop down, click **Add an app**
5. Scroll through the app tiles until you find the **Import Spreadsheet** app and then click on it.
6. SharePoint will display the **Site Contents > New page**
7. Enter the **Name** and **Description** of the list you want to create and then **Browse** to locate the spreadsheet
8. After you browse for the spreadsheet, click **Insert**
9. For **Range Type**, select **Range of Cells**
10. Delete the default values in **Select Range** and then click the range of cells in the spreadsheet that you want to import
11. Click the **Import** button on the pop up

To view the new list that SharePoint created,

12. Navigate to:  
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox
13. On the **Quick Launch**, click on **Site Contents**
14. Click on the new list that you created and SharePoint will display the contents