

# A Basic Introduction to SharePoint Services Information Management Features

The purpose of this document is to provide Apptix customers with a basic overview of the Information features of Windows® SharePoint® Services. This document is provided for informational purposes only and offers no warranty or guarantee of service. Should you have any questions regarding the content of this document, your service and or your SharePoint Account, please contact [Apptix SharePoint Support](#).

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## INTRODUCTION

One of the most challenging and frequent tasks that organizations are facing is how to manage their information. Whether it is a matter of version control, accessibility or security, information management is a critical issue that can have a major impact on productivity and employee satisfaction.

SharePoint sites are designed to help make information management easier and more effective. While each template can be customized to accommodate different types and sources of data, the default Team Template is set to allow storage of common types of information, such as event calendars, contacts, Web links, discussions, issues lists, and announcements. But even within this template, you can create custom lists for your site that meet your organization's specific information-sharing and management needs.

In SharePoint, lists are typically used to manage this type of information. Here we will examine the five basic list types: Announcements, Contacts, Events, Links and Tasks.

## ANNOUNCEMENT LISTS

Announcements are any messages that you wish to communicate with your users. These can be as brief as reporting a system outage or as detailed as describing a new set of guidelines for a project. An Announcements List provides a central place for users to go to check for new team messages or to post one of their own, depending upon how the list access is set up. For team leaders, this offers a single source for team communications that is visible and accessible to all users.

### *How To Create, Edit and Delete Announcements*



Your default site comes with a built-in Announcements list.

To access and edit this:

- Click **Announcements** from the body of the screen to view the list.

To add a new announcement to the Announcements list:

- Click **New Item** on the lists toolbar.
- Type in the title and text of your announcement. You can schedule an expiration for your announcement by adding a date to Expiration box or by clicking on the calendar icon and selecting the date there.
- Click **Save and Close** and you will see the title of your announcement, designated as "NEW", as well as the date and time when it was posted.

To edit or delete your announcement:

- Click on the title link.
- On the next screen, select either **Edit** or **Delete** from the menu bar.

**Note** You can also find all lists in your site by clicking **Documents and Lists** on the top link bar or by selecting **Lists** from the side navigation on the home page of your SharePoint site.

## CONTACT LISTS

Contacts can include anyone whom your team needs to communicate with. Using the contact list, you can provide a single, centralized repository from which users can access contact information, quickly and easily. **For Example:** A list of all project team contacts or vendors involved in a project. Contact information (such as telephone number, e-mail address, and street address) can be entered manually or copied directly to or from an email address book. (This requires a compatible address book program such as Microsoft Office Outlook® 2003 and/or Microsoft Internet Explorer 4.0 or later).

### *How To Create, Edit and/or Delete Contacts*



Once again, since your default SharePoint site already contains a built-in Contacts list, we will work from there. To view your Contact List:

- Click on the **Contacts** link from the side navigation.

To add a new contact to the Contacts list:

- Click **New Item** from the menu bar.

To add contacts from an Outlook address book:

- Select **Import Contacts** from the menu bar. This will prompt a pop-up window from your Outlook address book.
- Select the contacts that you wish to add from your address book to the Contact list and click **OK**. (Some users may see a pop-up warning that another program is trying to access Outlook. For those users, allow the access by clicking **OK**.)

To edit or delete a contact:

- Select the contact by clicking on the contact's name.
- To edit, click **Edit** from the menu bar, and type in the fields as needed, then select **Save and Close** from the menu bar.
- To delete, select **Delete** from the menu bar.

### **EVENT LISTS**

Events such as web seminars, conference calls and meetings play an important role in getting things done. Having your schedule for team events centrally accessible, makes it easy for team members to plan their time accordingly and avoid conflicts. Events from your Events list can also be linked to your Outlook Calendar.

### *How To Create, Edit and/or Delete Events*



Once again, since your default SharePoint site already contains a built-in Events list, we will work from there. To view your Events List:

- Click on the **Events** link from the side navigation.

To add a new Event to the list;

- Click **New Item** from the menu bar.
- Enter the title, beginning and ending dates, the description, location, recurrence and check whether or not you wish to use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event. Should you select to create a meeting workspace, a New Meeting Workspace Screen will follow. (We will cover this later on in another document) For now, do not select to create a Meeting Workspace.

To link to Outlook:

- Open your site to Events Page.
- Click **Link to Outlook**

To edit or delete an event:

- Select the event by clicking on the event name.
- To edit, click **Edit** from the menu bar, and type in the fields as needed, then select **Save and Close** from the menu bar.
- To delete, simply select **Delete** from the menu bar.

## LINK LISTS

The purpose of Links Lists is to allow quick access via links, to websites that are of interest and importance to your team. A marketing team, for instance, might use this feature to provide quick access to websites on which they are currently running advertising campaigns, or in which, they may have received media coverage. This list is not included as part of your default page, so here we will show you how to create this.

### *How To Create, Edit and/or Delete Links*



To create a Links list (or any other list):

- Click on the **Lists** link on the side navigation.
- On the next screen you will see a menu listing the five types of lists that defined in this default template: Announcements, Contacts, Events, Links and Tasks. From here you can select any of these types or create a custom list. (We will cover the creation of custom lists in a later document.) For now, select **Links**. This will bring up the Links control screen.

To add a link:

- Click **New Item** on the from the top menu bar.
- Type in the URL, description and any notes regarding this link, then click **Save and Close**. On the next screen you will see your new link and the newly created Links List.

To edit or delete a link:

- Click on the link title.
- On the next screen, select either **Edit** or **Delete** from the menu bar.

## TASK LISTS

Getting the job done right, takes careful planning, coordination and execution. Given the fast pace and tight deadlines for most projects, managing who is responsible for what and what the status for each task is can be a real challenge. That is why many users integrate the task list into their team site. Using the task list, managers can easily track the progress of each task, while other team members can track the progress of tasks that need to be coordinated with their own tasks. These can also be set to coordinate with the tasks features in Outlook (We will cover this topic in a later document.)

### *How To Create, Edit and/or Delete Tasks*



To add a task:

- Click **New Item** on the from the top menu bar.
- Type in the task name, description, to whom it is assigned and any other relevant data, then click **Save and Close**. On the next screen you will see your new task and the newly created Tasks List.

To edit or delete a task:

- Click on the task title.
- On the next screen, select either **Edit** or **Delete** from the menu bar.

## USING YOUR EXISTING LISTS AND SPREADSHEETS

To avoid re-typing information and save time, you can also use any lists or spreadsheets that you have previously created as a list on your SharePoint site. SharePoint will allow you to import the data from the spreadsheet and will display it the same layout (columns and rows) as the original spreadsheet, in columns that team members can filter and sort, with commands that enable team members to add, edit, and delete items.

To import data from a spreadsheet, you must have a SharePoint-compatible spreadsheet program, such as Microsoft Office Excel 2003, and Internet Explorer 5 or later installed. If you have a SharePoint-compatible productivity program installed, such as Microsoft Office Professional Edition 2003, you can view and use your lists in your team site by using datasheet view. The datasheet view allows you to quickly add, delete, and update list entries, just as you would in a spreadsheet program, without having to switch to a separate program.

This allows you and your users to quickly and easily upload and utilize your existing documents and spreadsheets to populate your SharePoint site. This feature often reduces individual data islands and the amount of materials being saved over and over again by individuals and groups.

### **How To Upload An Existing List or Spreadsheet**



To upload an existing list or spreadsheet:

- Click **Create**, from the top nav.
- On the Create Page page, click **Import Spreadsheet**.
- Select the spreadsheet that you wish to import and click on the **Import** button.
- A dialog box will pop-up asking how you want the fields in your spreadsheet to be represented in SharePoint. Follow and complete as directed. Once you are finished you will see your new list added to your site and accessible.

**HINT:** If you use the Datasheet View, you can view any list in spreadsheet format and more easily edit and manipulate the data in the list. To view a list in datasheet view, click **Edit in datasheet view** on the list page.

### **CUSTOM LISTS**

While the list types that we have reviewed thus far can meet a number of your existing needs; many users find the need to create their own custom lists. SharePoint supports this and allows user to build these customized lists quickly and easily

### **Creating Custom Lists**



Creating a custom list can be done in two stages:

- First, from the top navigation bar, click **Create**, and specify **Custom List**.
- This will bring up the **New List** screen. On this screen enter the name and description for your custom list and click **Create**.
- This will create your custom list. Next you will add columns. From the side navigation, click **Modify settings and columns**.
- For each column that you want to add, in the **Columns** section of the **Customize** page, click **Add a new column**. Select the attributes for the new column, then click **OK**. Your new column should be added.

To add data to this list:

- Click **New Item** from the menu bar.
- Add your information and click **Save and Close**. Repeat these steps to add as many new lists, columns and items as needed.

We hope that this document has been helpful to you as you. The next document in this series will cover the basics of File Sharing and Document Management.

Should you have any questions regarding the material covered within this document or need any assistance with your SharePoint site, please contact Apptix SharePoint Support at [SPSupport@Apptix.com](mailto:SPSupport@Apptix.com).