SPO Members - Lists User Guide

Ministry of SaskBuilds and Procurement

This document provides instructions and support for utilizing the many features available in SharePoint Lists.

Contents

Create a new list

- To add a new list to your site, click "**+New**" on your site home page and select list.
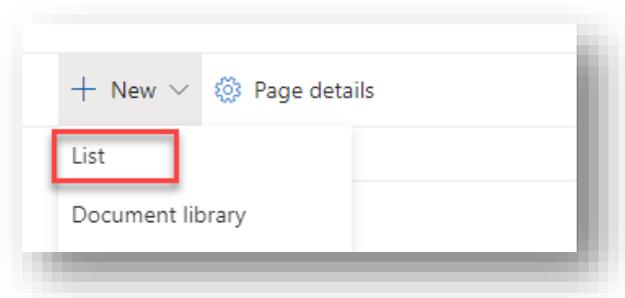
SPO Members - Lists User Guide

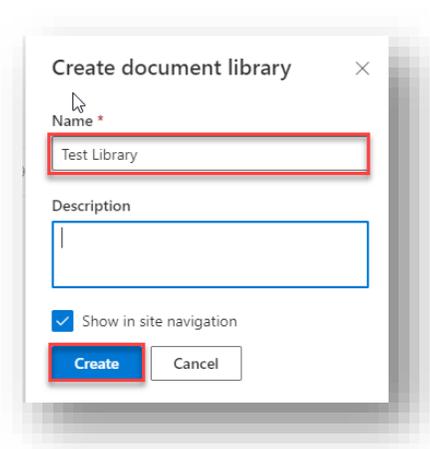Last revised: February 2021
Last reviewed: February 2021
Next review: February 2022

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- Enter "Name", Description (optional) and click "**Create**".

- (1) Choose "**Blank List**" if your list doesn't match any pre-selected templates shown below. (2) Choose "**From Excel**" if you want to create a list from an excel sheet. (3) Choose "**From existing list**" if you want to create a new list similar to an existing list. (4) Choose a pre-existing template if it matches your requirements.
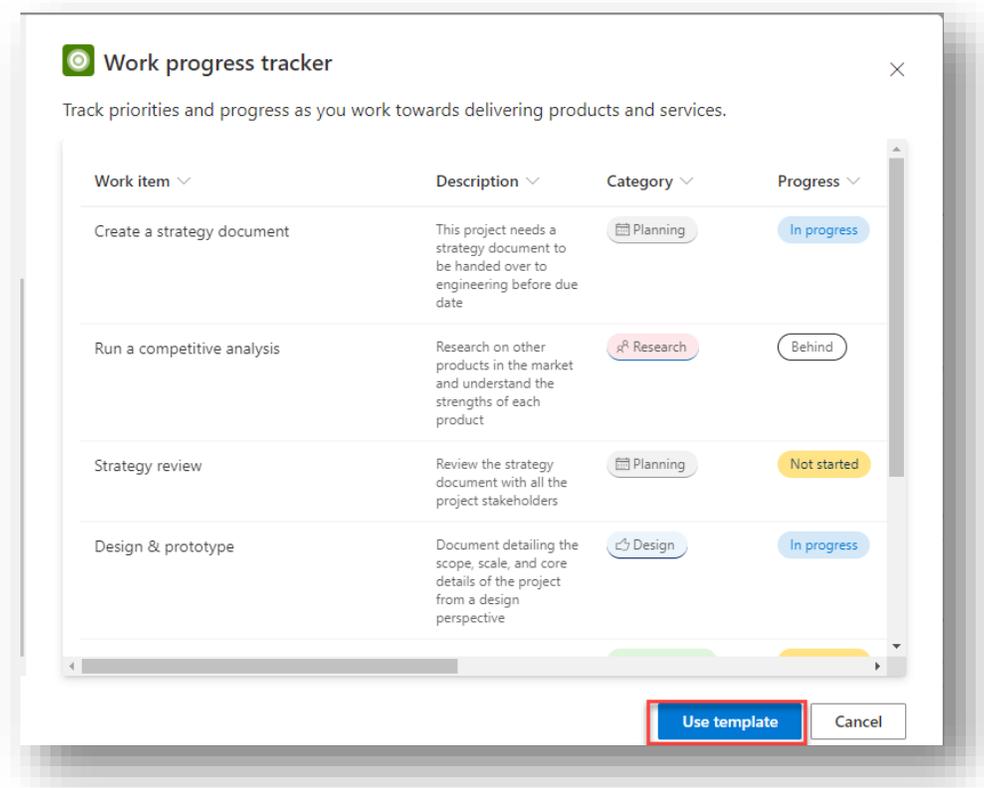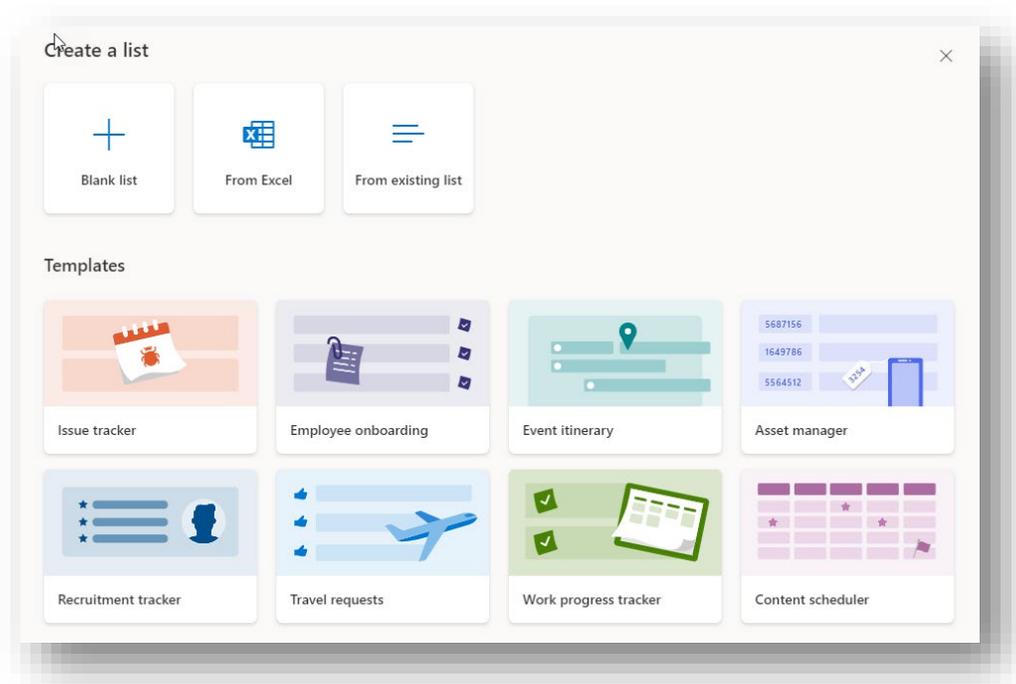
Ministry of SaskBuilds and Procurement
This document provides instructions and support for utilizing the many features available in SharePoint Lists.

SPO Members - Lists User Guide

Ministry of SaskBuilds and Procurement

This document provides instructions and support for utilizing the many features available in SharePoint Lists.

Last revised: February 2021
Last reviewed: February 2021
Next review: February 2022

- Choose list name and click "**Create**".
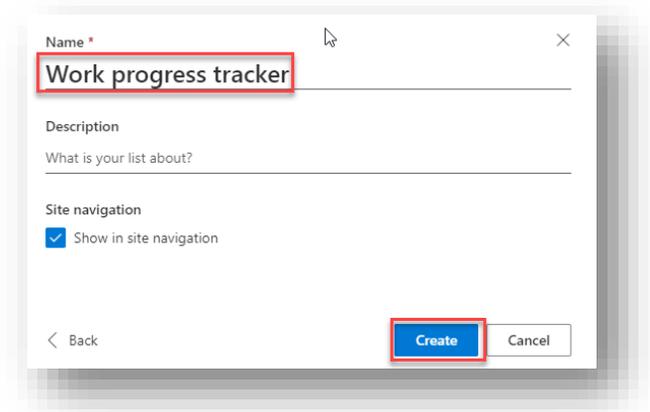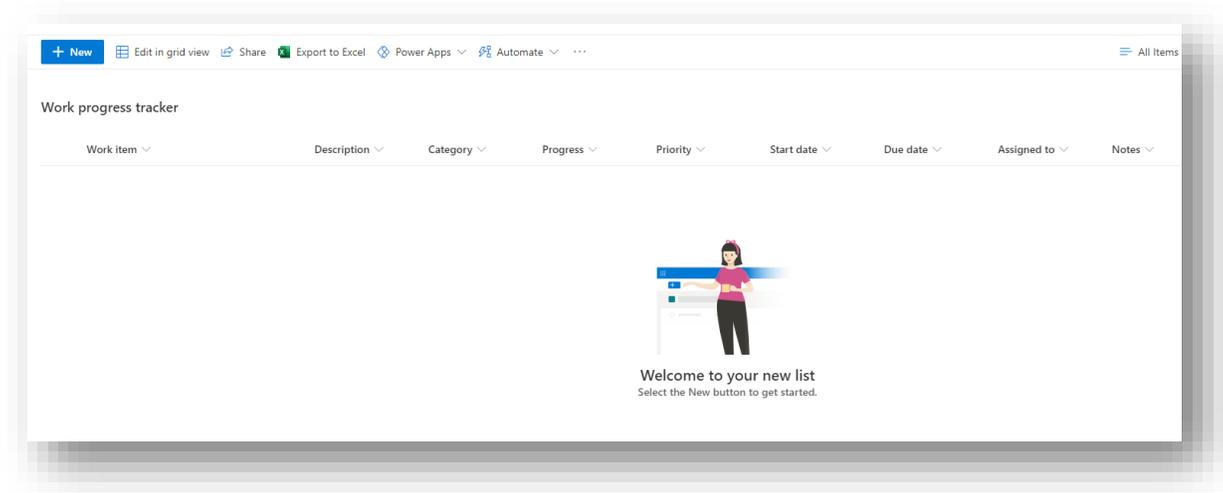
Managing your list

- To add a new list to your site, click "**+New**" on your site home page and select list.

Adding items to your list

- Click on "**New**".

- Enter item details and click "**Save**".

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SPO Members - Lists User Guide

Ministry of SaskBuilds and Procurement

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Last revised: February 2021
Last reviewed: February 2021
Next review: February 2022

Edit existing items

Edit single item

- To edit an existing item, select the item and click "**Edit**".

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- Make required changes and click "**Save**".
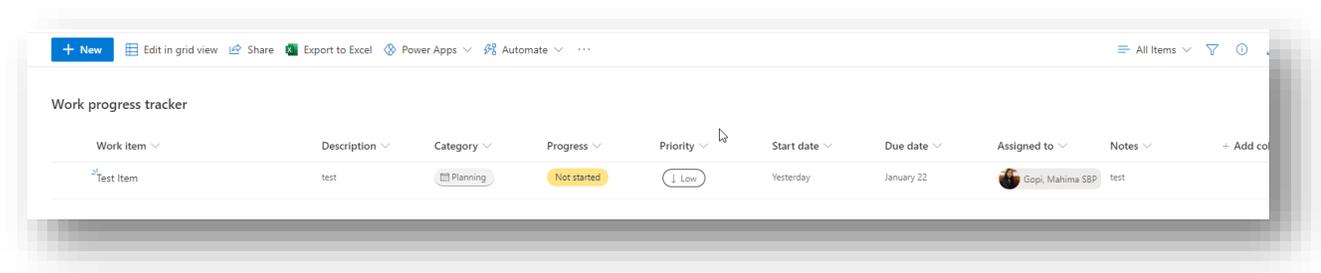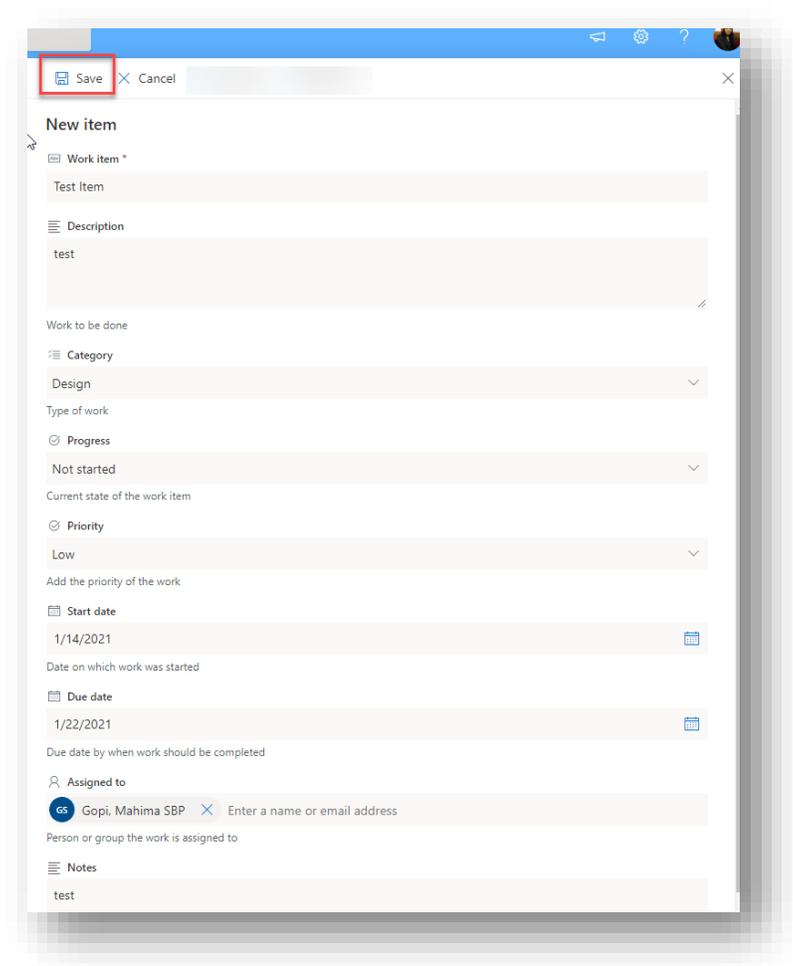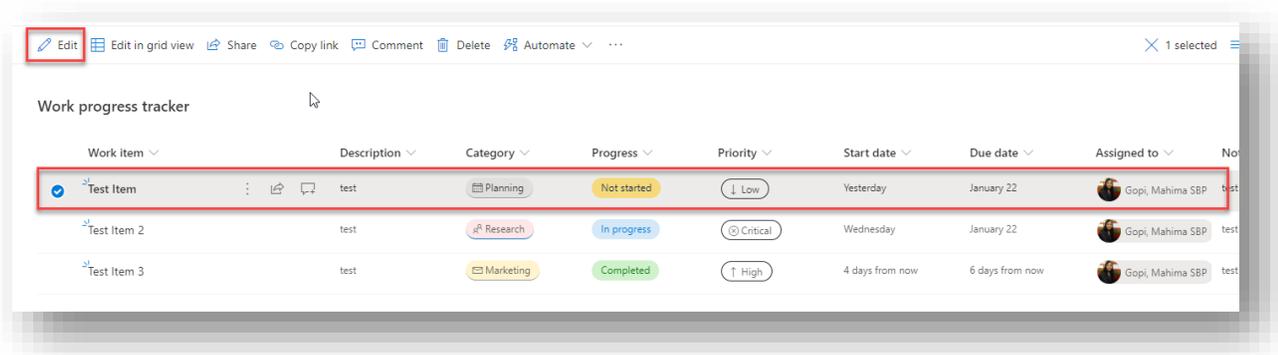
SPO Members - Lists User Guide

Last revised: February 2021
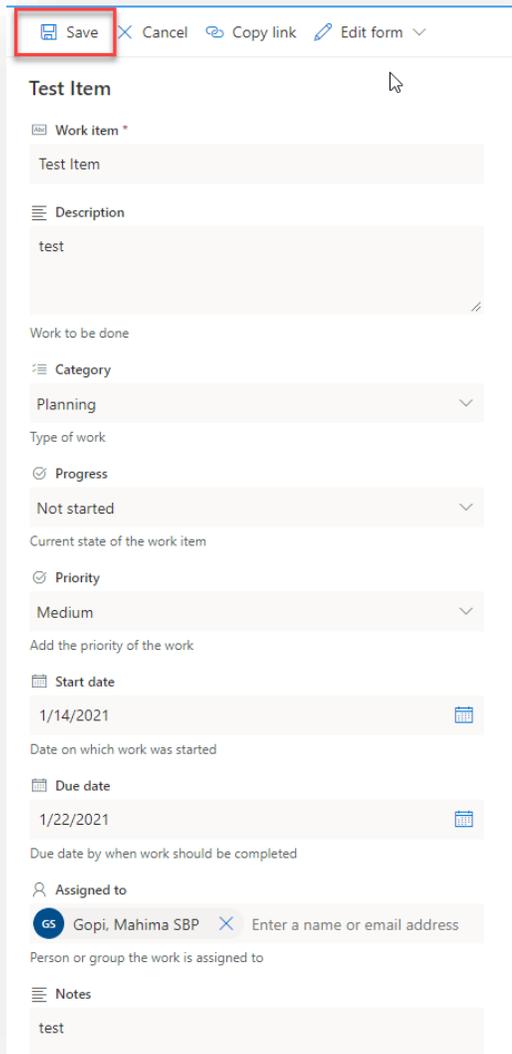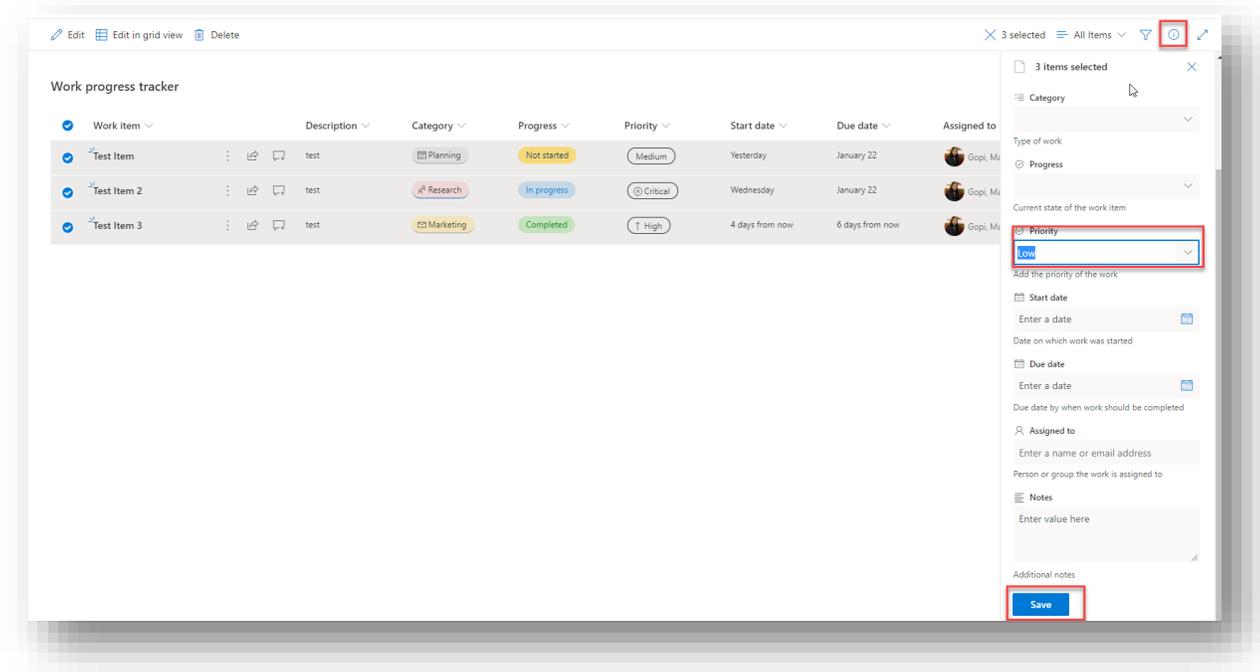Last reviewed: February 2021
Next review: February 2022

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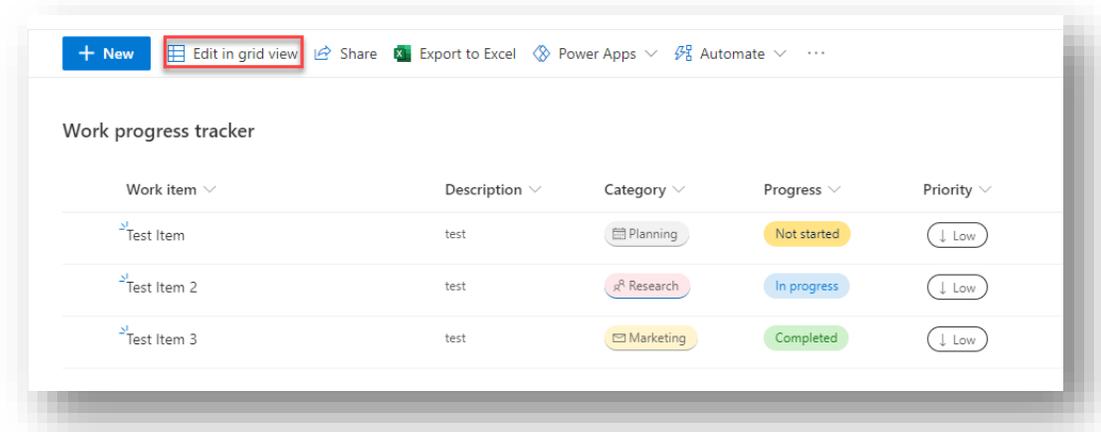
Bulk Edit

- Bulk edit is useful if you want to make the same change in multiple items at once. To bulk edit, select items and click ⓘ. Edit properties and click "Save".

Edit in grid view

- Click "**Edit in grid view**", make changes and click "**Exit grid view**".

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SPO Members - Lists User Guide

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Add Comments

- Select item and click "**Comment**".

- Type your comment and press the arrow shaped button on the bottom right of the comment box.
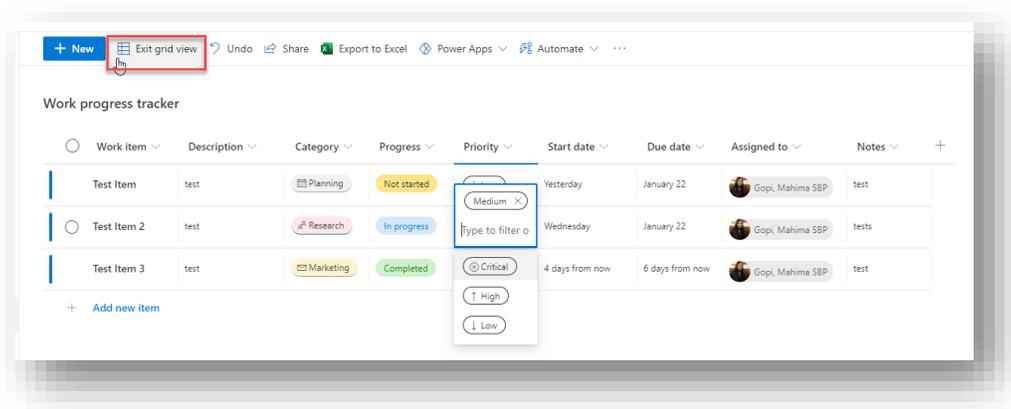
SPO Members - Lists User Guide

Last revised: February 2021
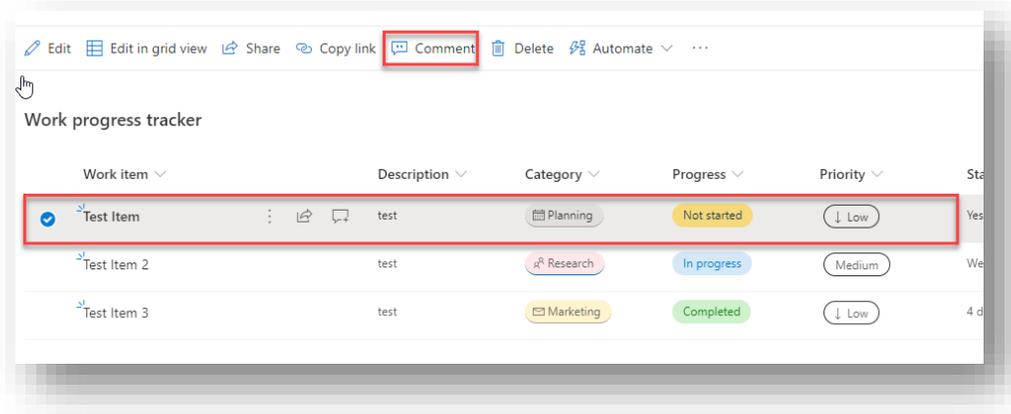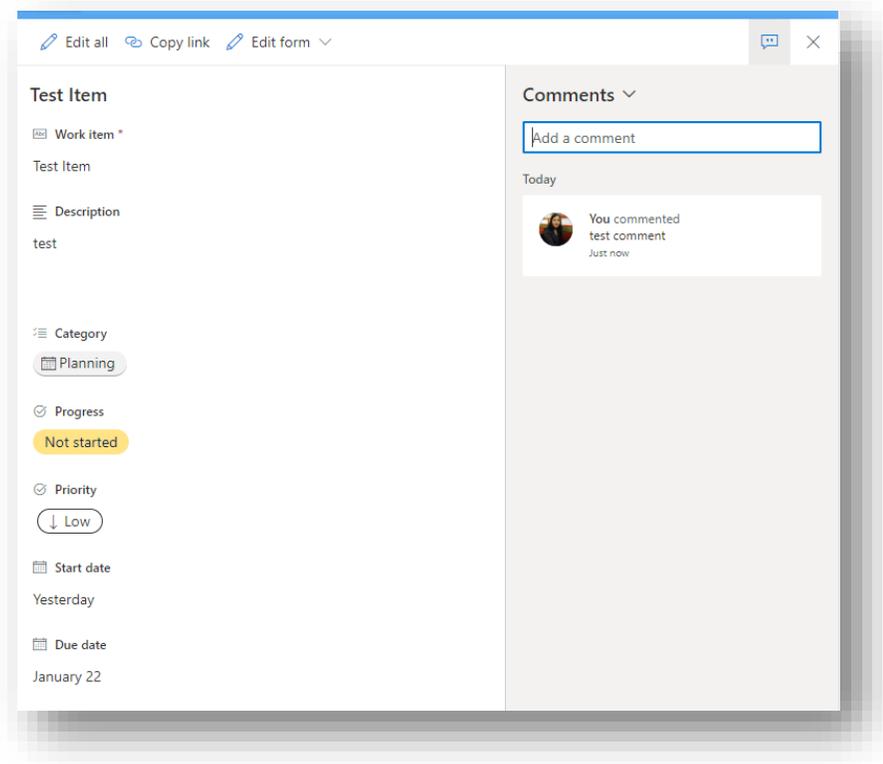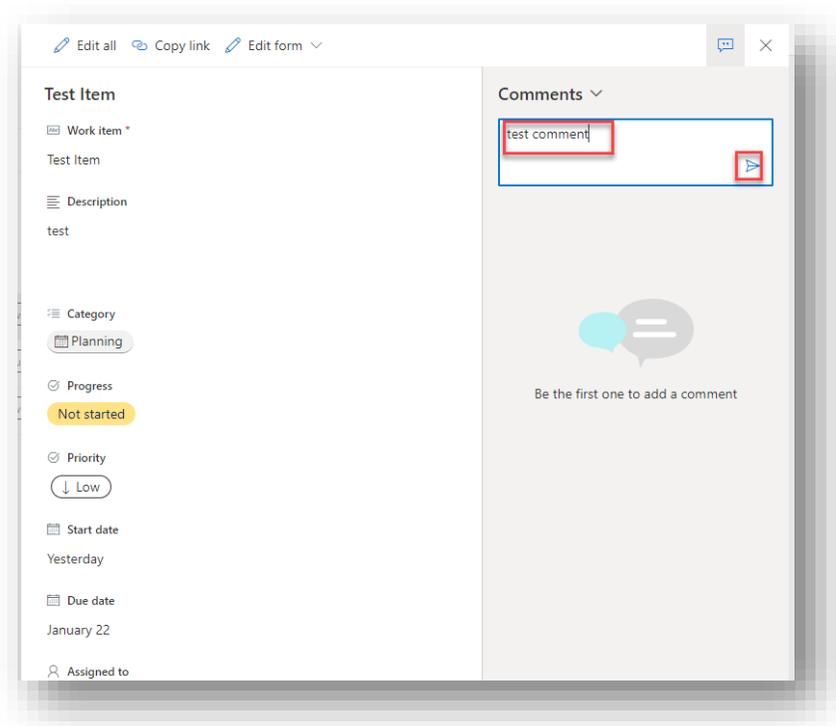Last reviewed: February 2021
Next review: February 2022

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- You will see a comment icon. Click the icon to view comments associated with the item.

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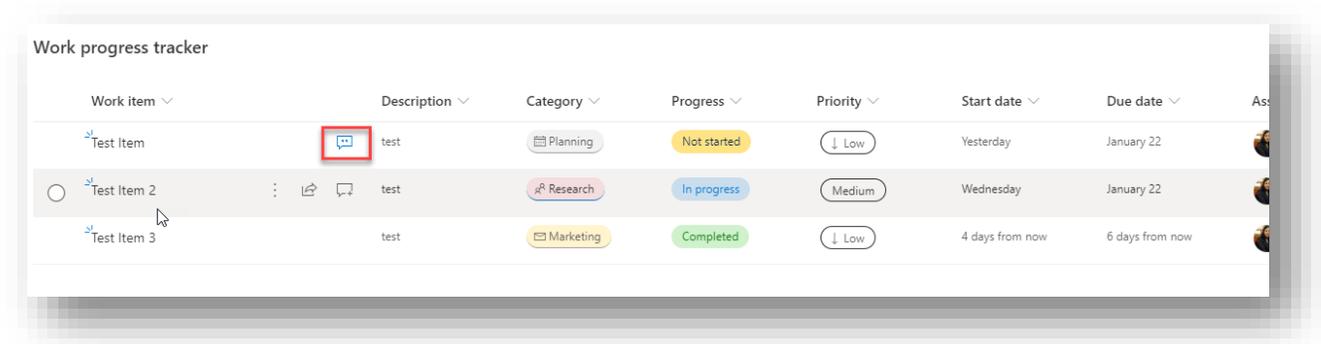

Search Item

To search a particular item, type search text in the search box on the top and press "Enter" or arrow beside the search box.

Sort Items

- To sort items based on a property or column, click on the column name and select sorting order. See image below.

SPO Members - Lists User Guide

Last revised: February 2021
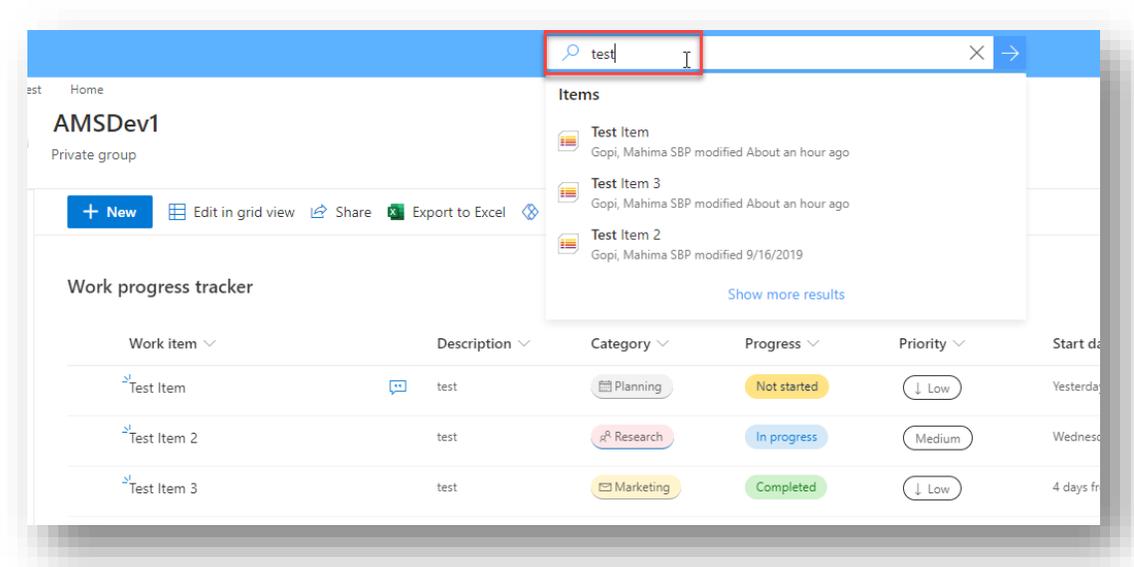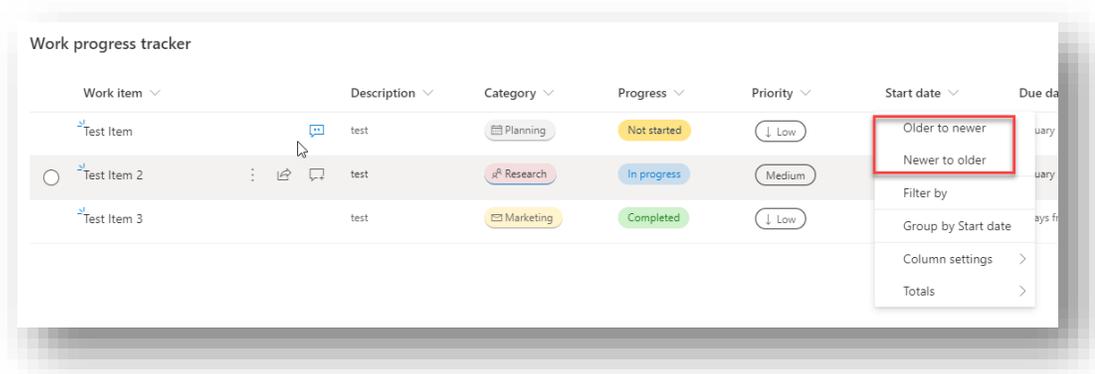Last reviewed: February 2021
Next review: February 2022

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Filter Items

- To filter items, click on column name and select "Filter By" from the menu.

- Choose the value(s) you want to filter by and click "Apply".

SPO Members - Lists User Guide

Last revised: February 2021
Last reviewed: February 2021
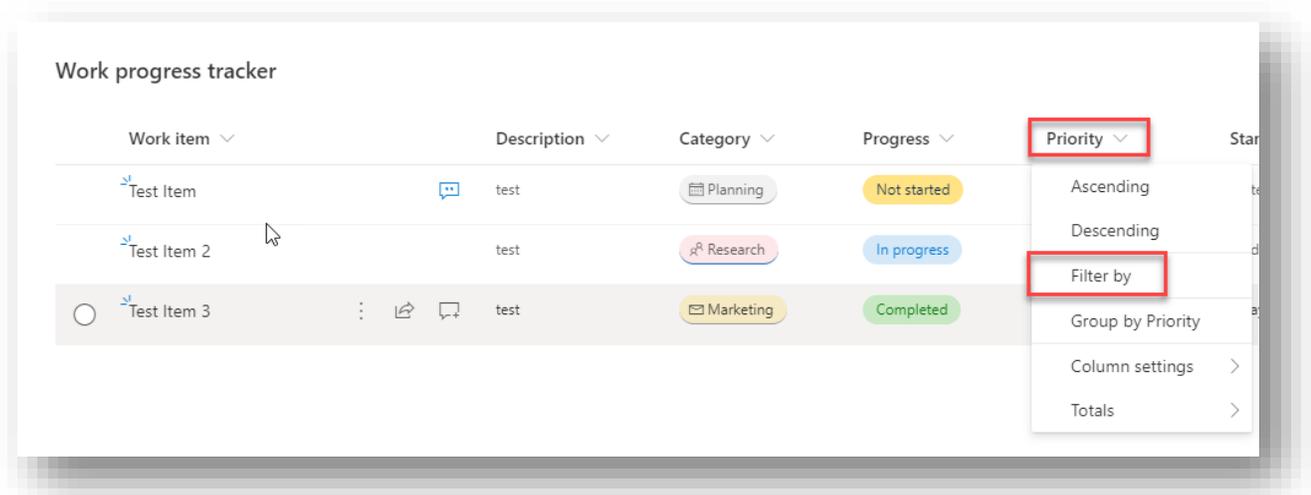**Next review: February 2022**

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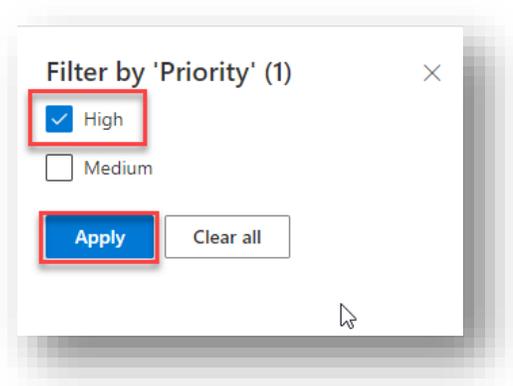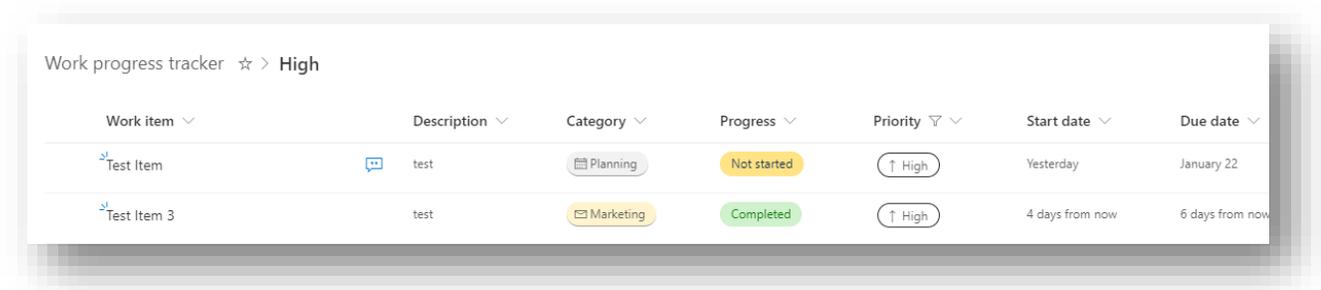
- Filter can be applied to multiple columns.

Filters Pane

- To open the filters pane, click on ▽ on the top right. Filters can also be set or removed from here.

SPO Members - Lists User Guide

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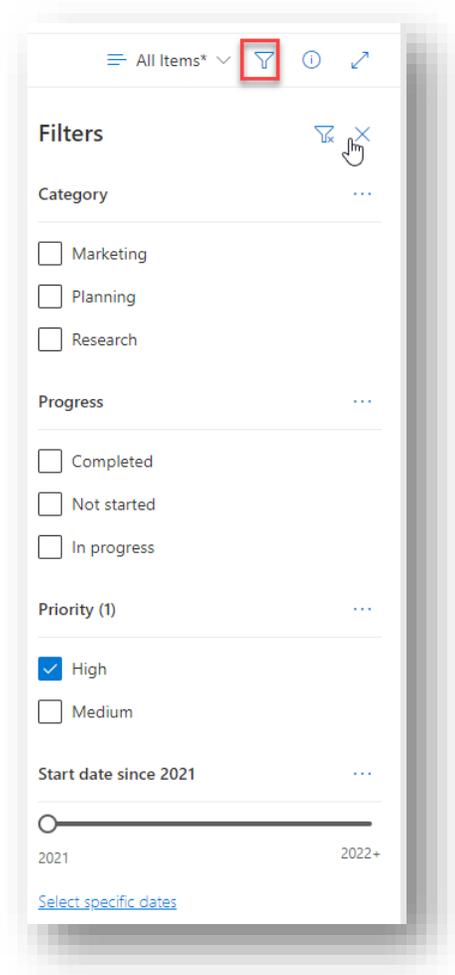
Group Items

- Items can be grouped based on a column value. To group items, click on column name and select "Group By" from the menu.

Show Totals

- To show totals for a column, click on column name and select "Totals". Choose the type of count you want to show for the column.

Saskatchewan

SPO Members - Lists User Guide

Last revised: February 2021
Last reviewed: February 2021
Next review: February 2022

Ministry of SaskBuilds and Procurement
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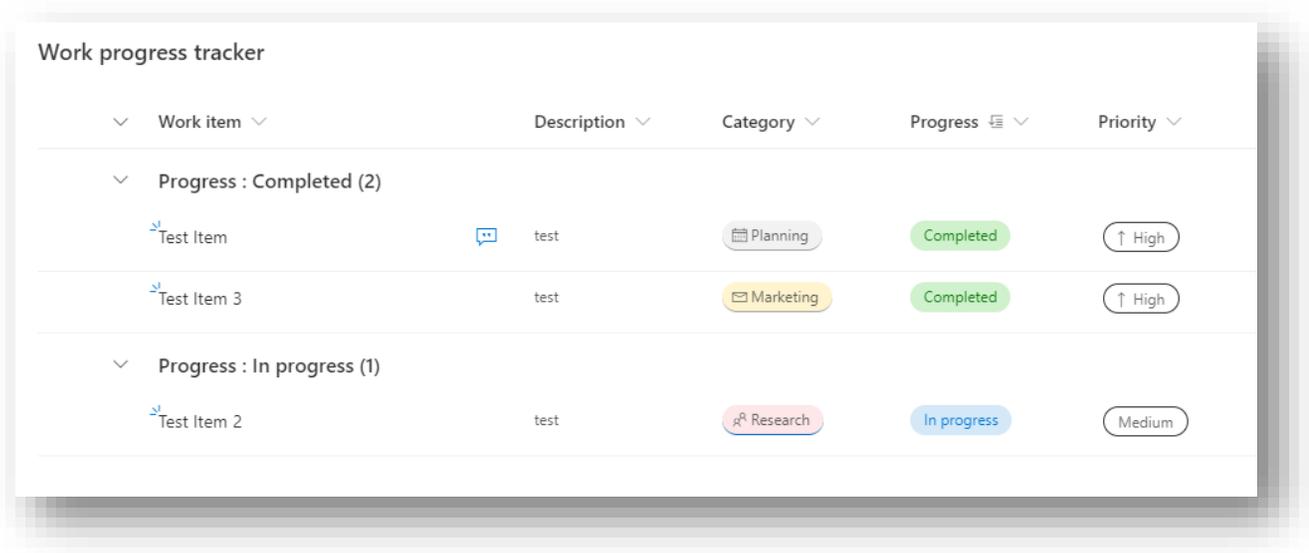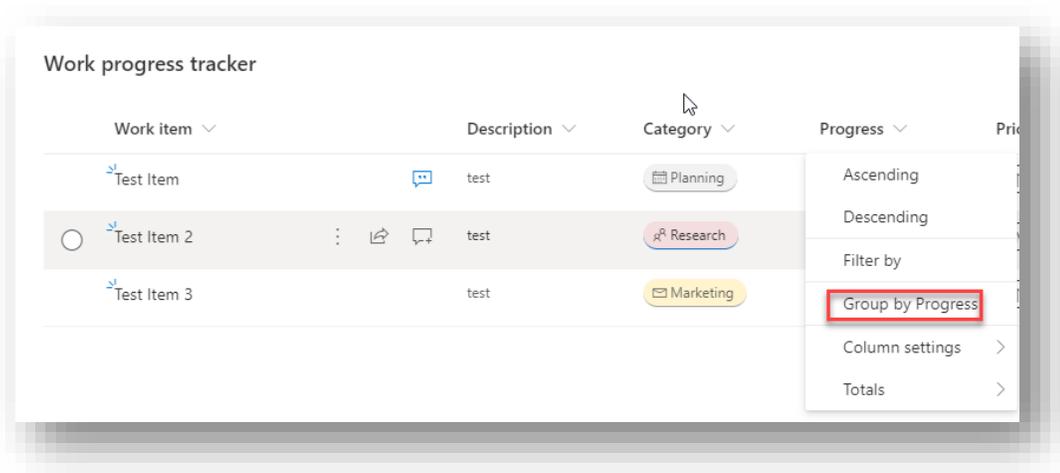
Edit View

Show/Hide Columns

Hide Column from view

- To remove a column from the view, click on column name and select "Column Settings" >> "Hide this column".
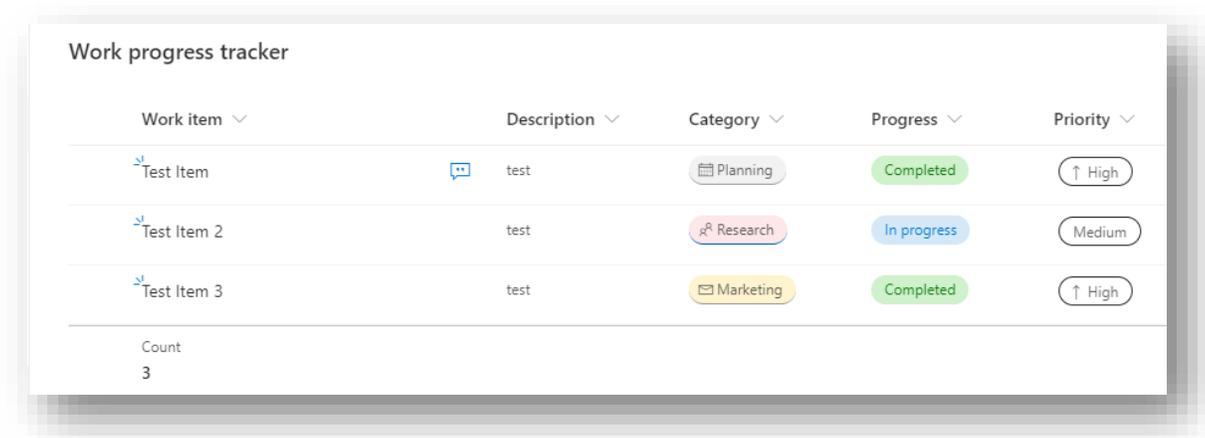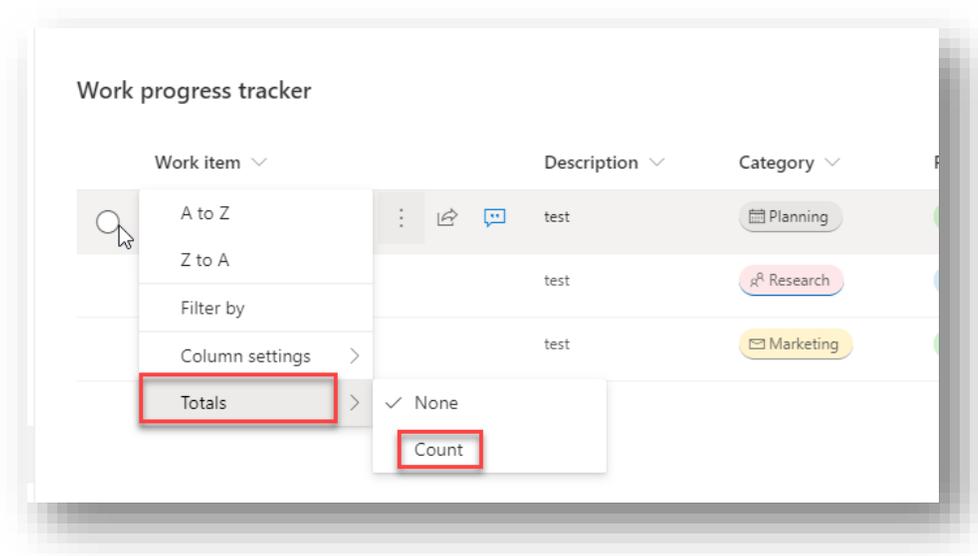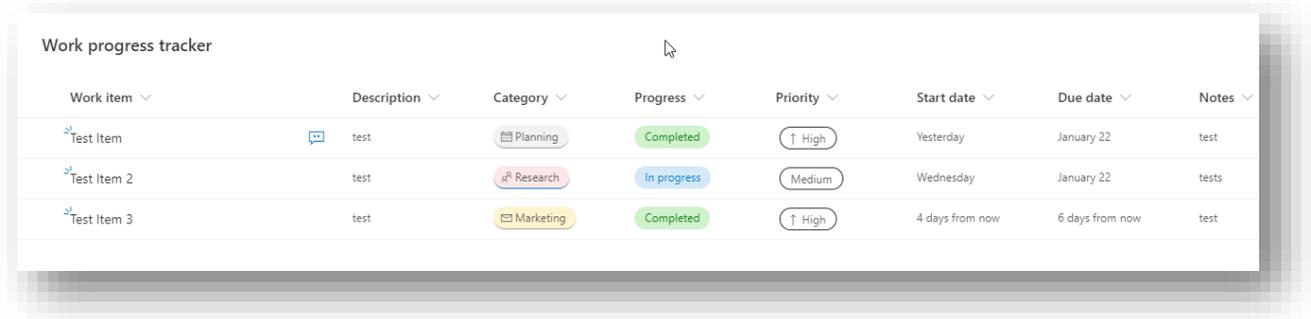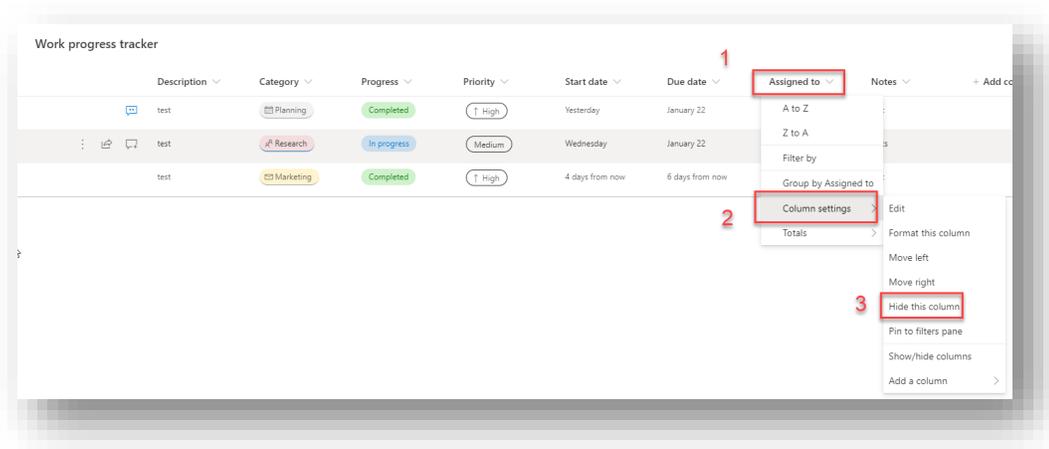
SPO Members - Lists User Guide

Ministry of SaskBuilds and Procurement

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Last revised: February 2021
Last reviewed: February 2021
Next review: February 2022

Add Column(s) to view

- To add more columns in the view, click on "Add Columns" >> "Show/hide columns".

SPO Members - Lists User Guide

Ministry of SaskBuilds and Procurement

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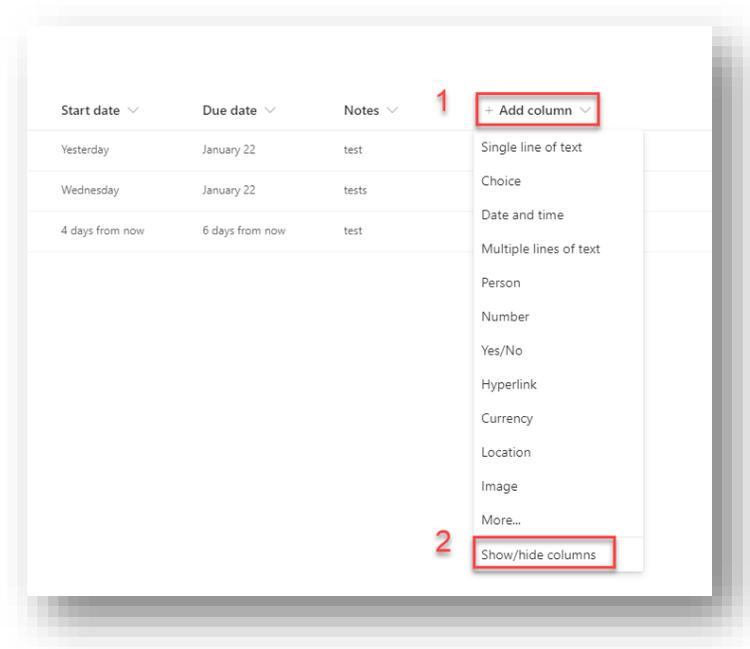
- Check the column(s) you want to add and click on "Apply" to add those columns to view.

Re-Order Columns

- To reorder a column, drag it to the position you want.

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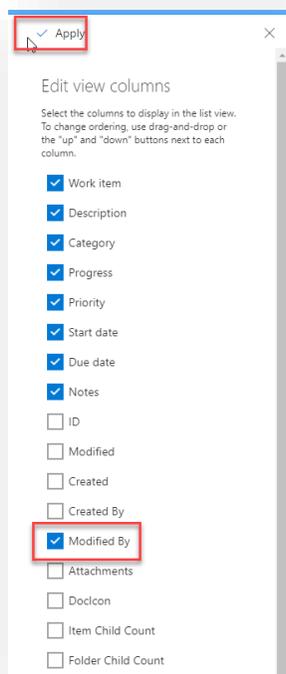Saskatchewan

SPO Members - Lists User Guide

Last revised: February 2021
Last reviewed: February 2021
Next review: February 2022

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- To reorder multiple columns at once in the view, click on "Add Columns" >> "Show/hide columns".

- Click on the up and down arrows to change order and click "Apply".
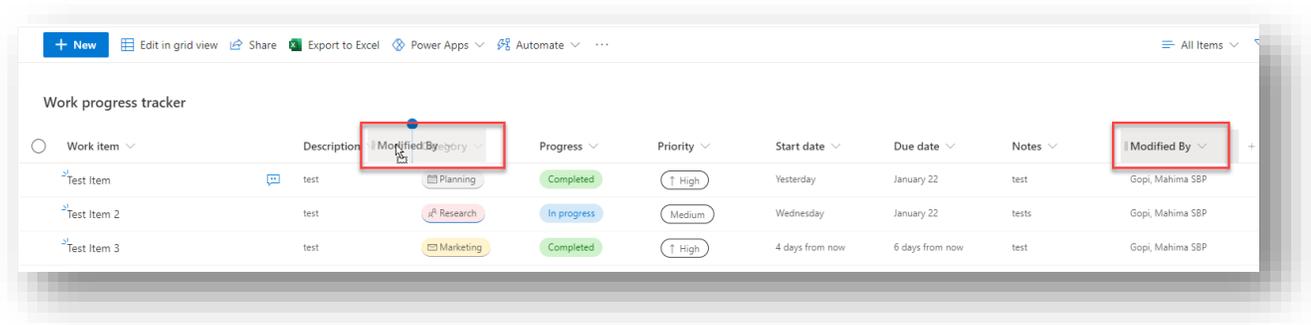
SPO Members - Lists User Guide

Last revised: February 2021
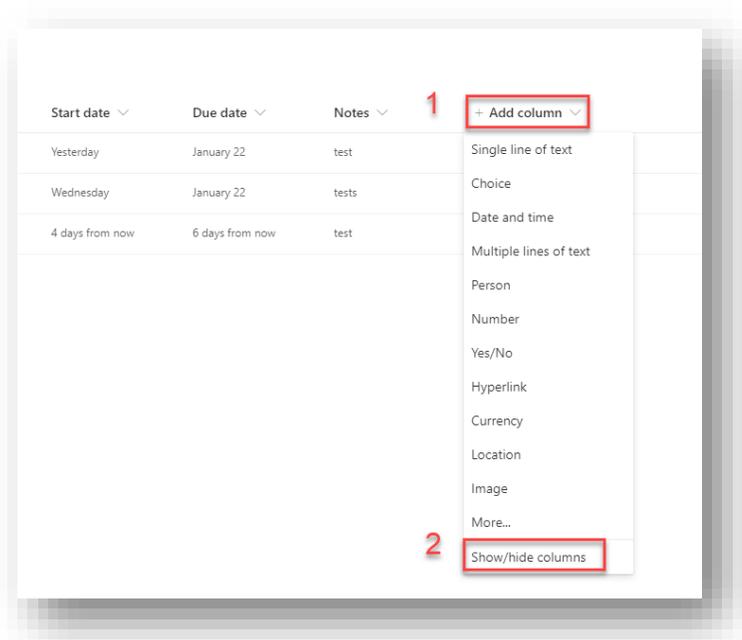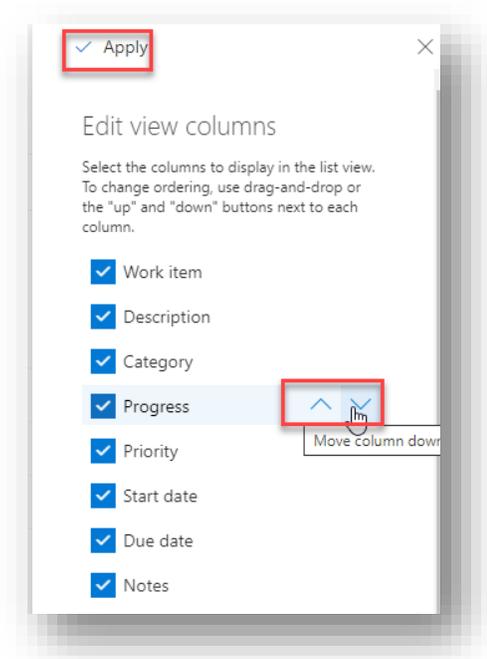Last reviewed: February 2021
Next review: February 2022

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Format Column

- To format a column, click on column name and select "Column Settings" >> "Format this column".

- Choose the formatting option and click "**Save**".

SPO Members - Lists User Guide

Last revised: February 2021
Last reviewed: February 2021
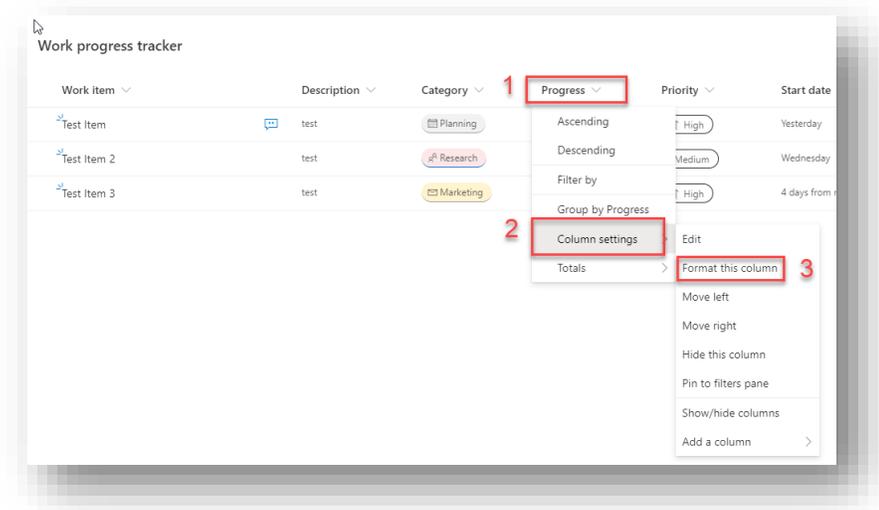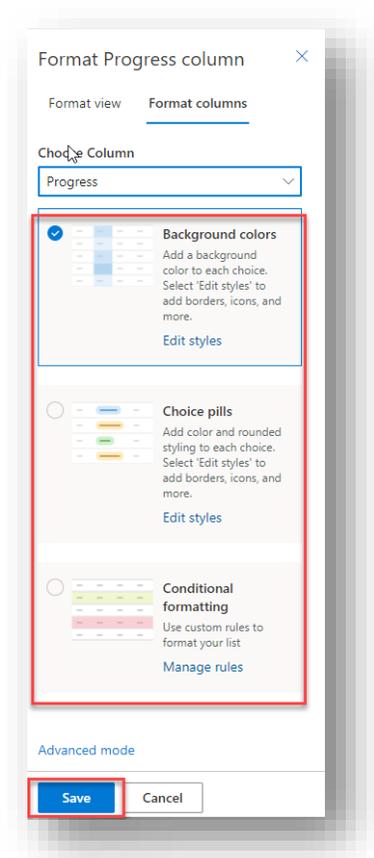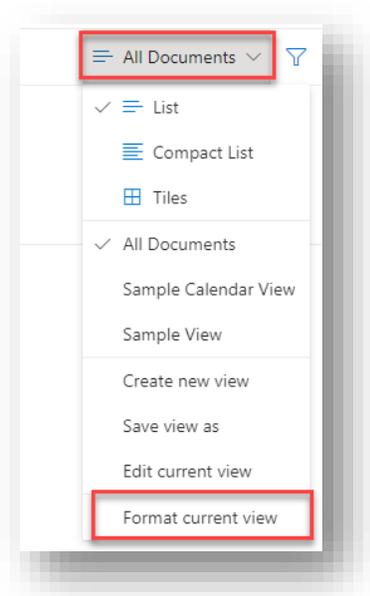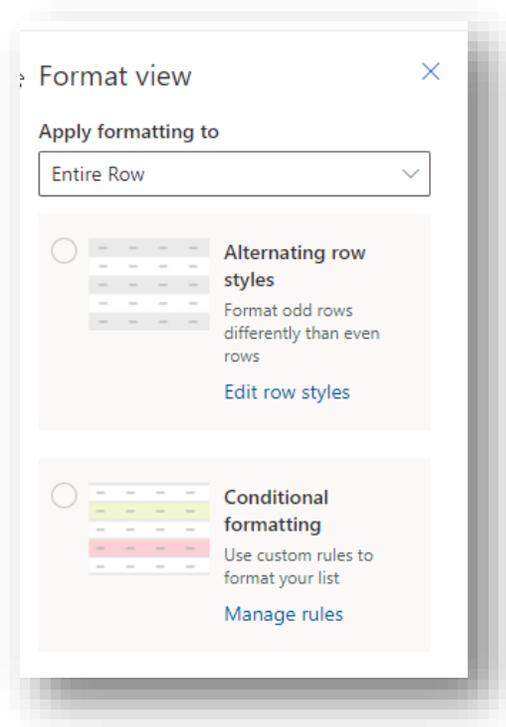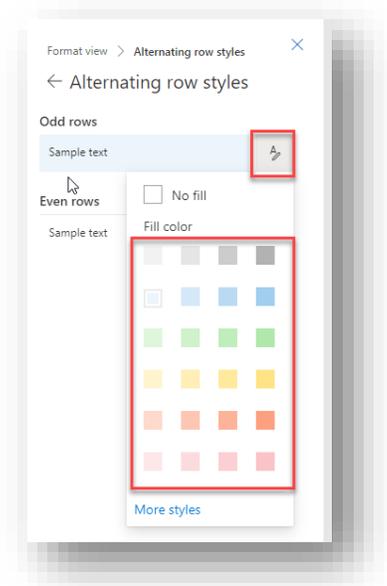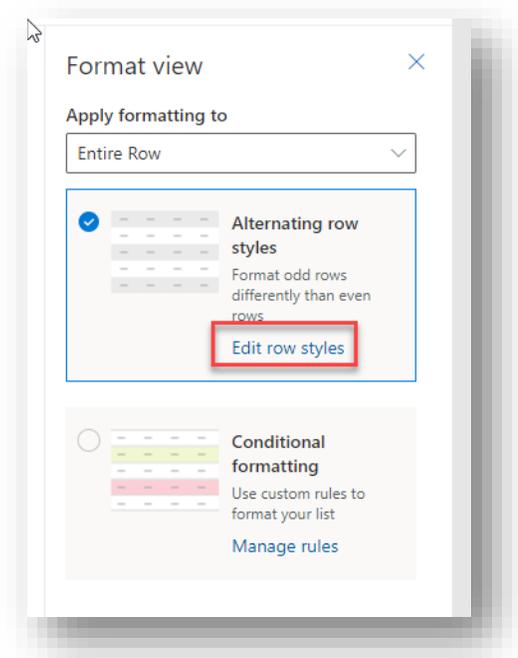Next review: February 2022

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Format Progress column

Format view   **Format columns**

Choose Column

Progress ▼

● **Background colors**
Add a background color to each choice. Select 'Edit styles' to add borders, icons, and more.
Edit styles

○ **Choice pills**
Add color and rounded styling to each choice. Select 'Edit styles' to add borders, icons, and more.
Edit styles

○ **Conditional formatting**
Use custom rules to format your list
Manage rules

Advanced mode

Save   Cancel

Work progress tracker

Work item		Description	Category	Progress	Priority
Test Item	💬	test	📅 Planning	Completed	↑ High
Test Item 2		test	👥 Research	In progress	Medium
Test Item 3		test	✉ Marketing	Completed	↑ High

Format View

- Click on "Format current view".

Saskatchewan

SPO Members - Lists User Guide

Ministry of SaskBuilds and Procurement

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Last revised: February 2021
Last reviewed: February 2021
Next review: February 2022

- Choose the formatting option. See formatting options below:
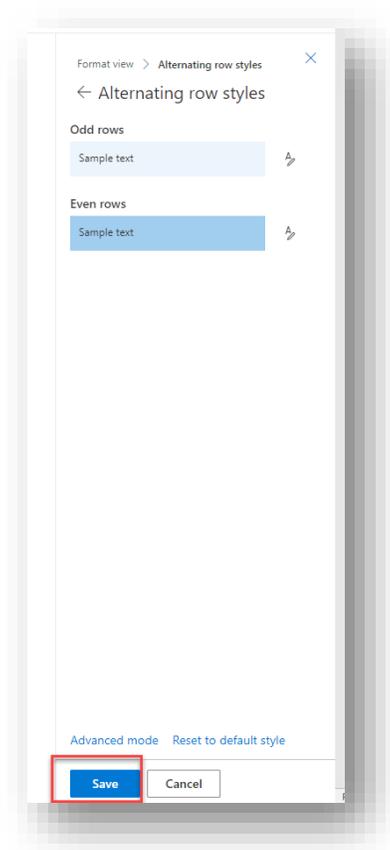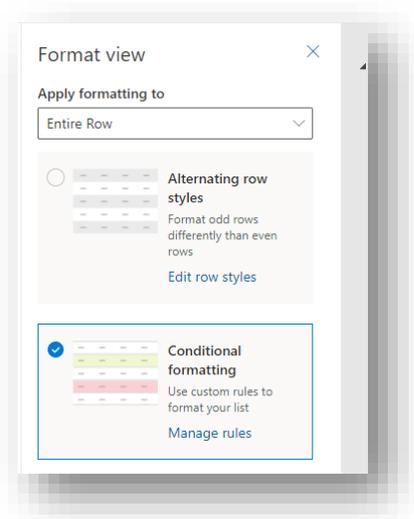
SPO Members - Lists User Guide

Last revised: February 2021
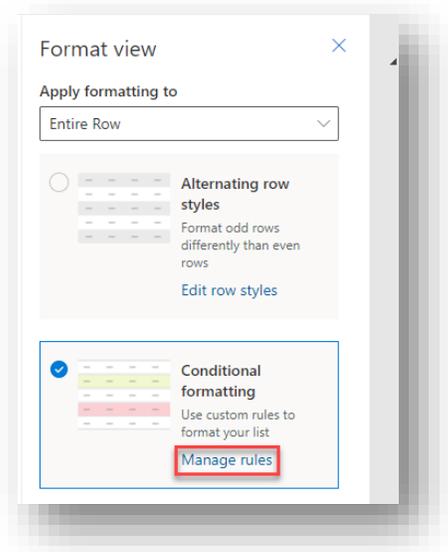Last reviewed: February 2021
Next review: February 2022

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Alternating row styles (For entire row)

- Formats odd rows differently than even rows.
- Click on "Edit row styles" to change the auto selected colors.

- Click on "Save" to save the chosen formatting.

Saskatchewan

SPO Members - Lists User Guide

Ministry of SaskBuilds and Procurement

This document provides instructions and support for utilizing the many features available in SharePoint Lists.

Last revised: February 2021
Last reviewed: February 2021
Next review: February 2022

Conditional Formatting

- Formatting based on a condition.

SPO Members - Lists User Guide

Last revised: February 2021
Last reviewed: February 2021
Next review: February 2022

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This document provides instructions and support for utilizing the many features available in SharePoint Lists.

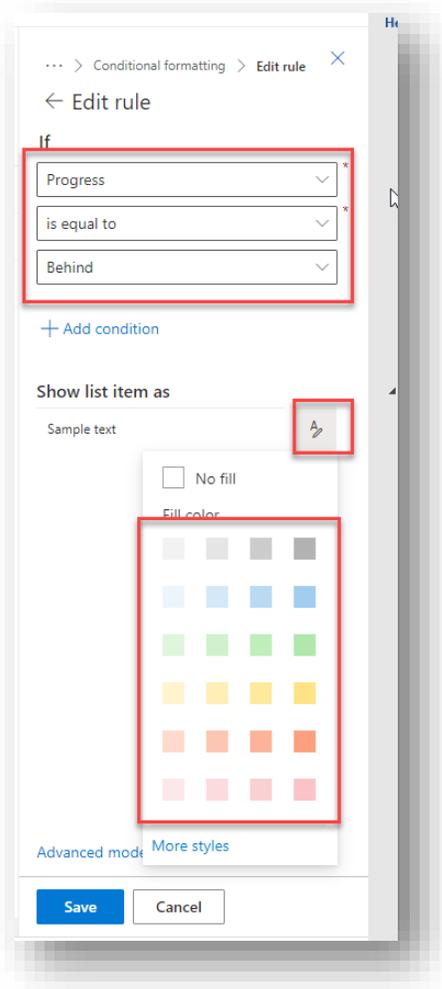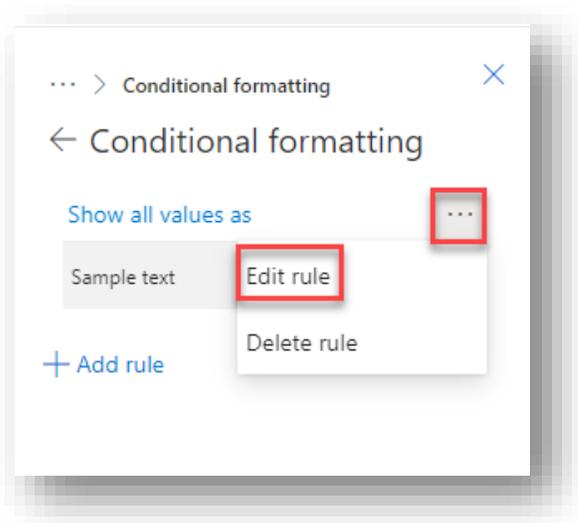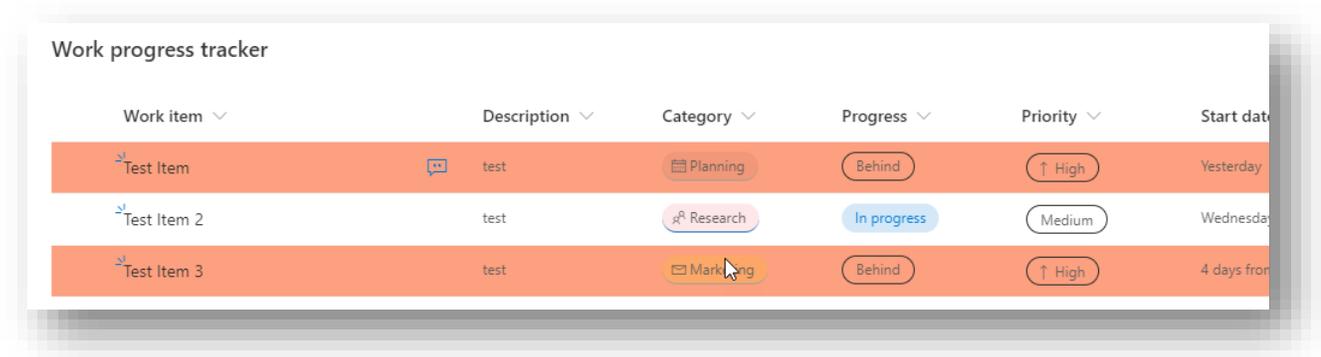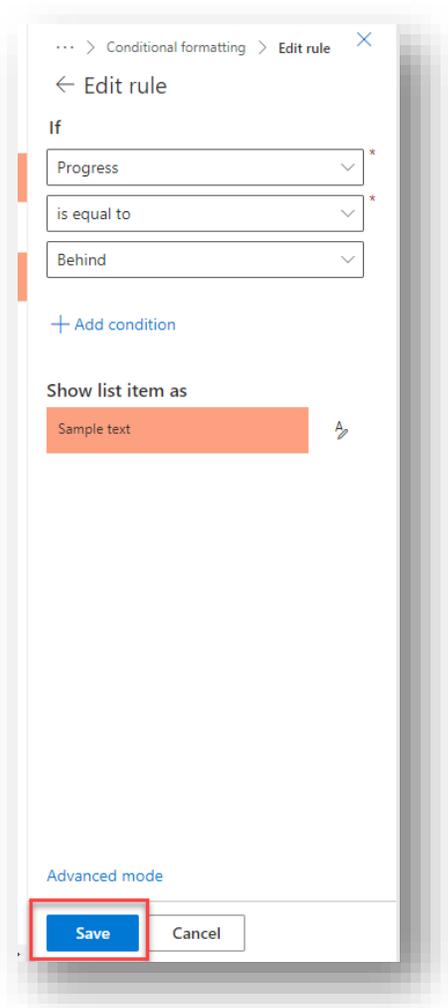- Click on "Manage rules" to select condition.

SPO Members - Lists User Guide

Last revised: February 2021
Last reviewed: February 2021
Next review: February 2022

Ministry of SaskBuilds and Procurement
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SPO Members - Lists User Guide

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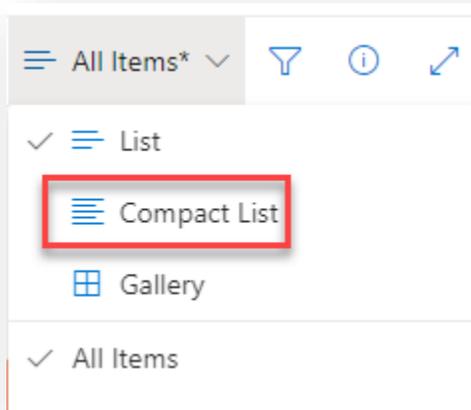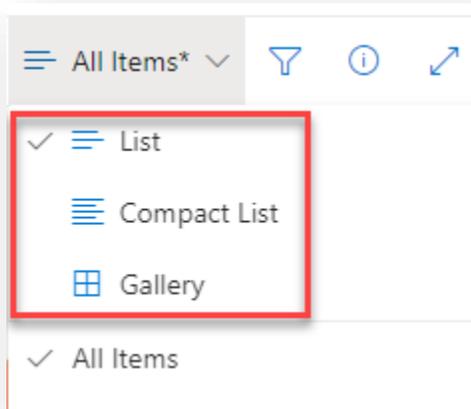
Change View Style

- "List" is the default style selected. It can be changed to "Compact List" or "Gallery".

SPO Members - Lists User Guide

Ministry of SaskBuilds and Procurement

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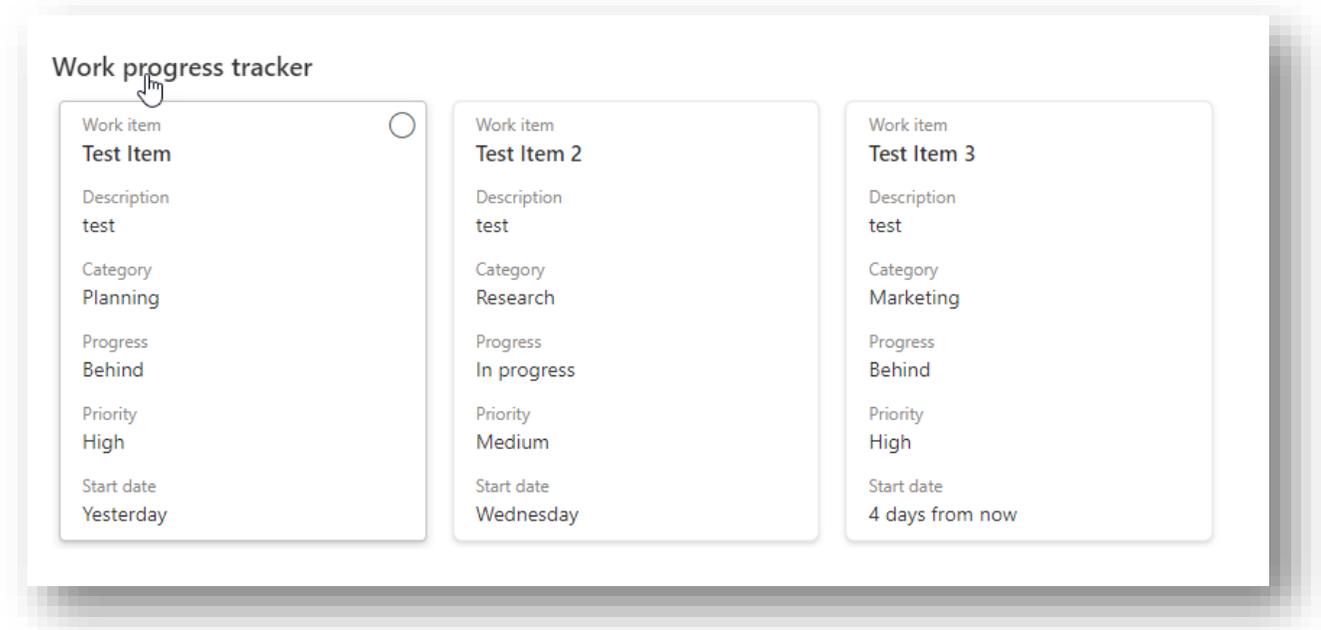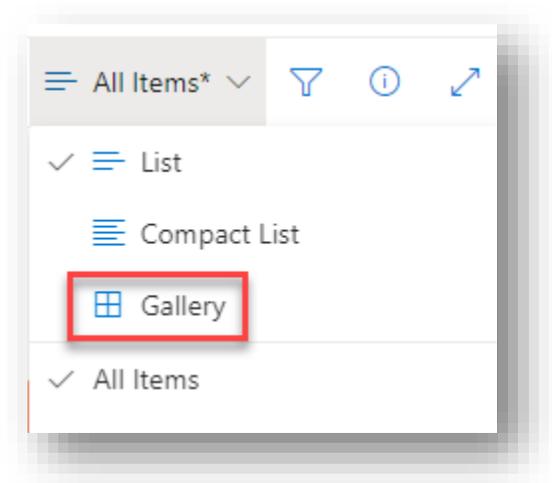
Saskatchewan

SPO Members - Lists User Guide

Last revised: February 2021
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Next review: February 2022

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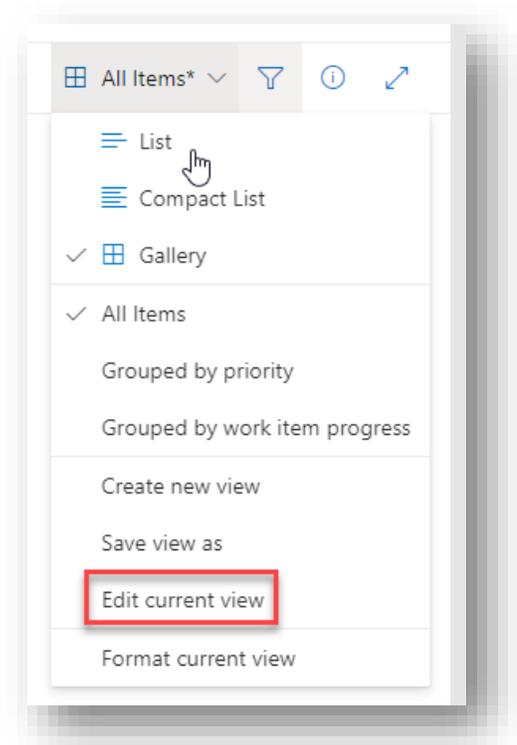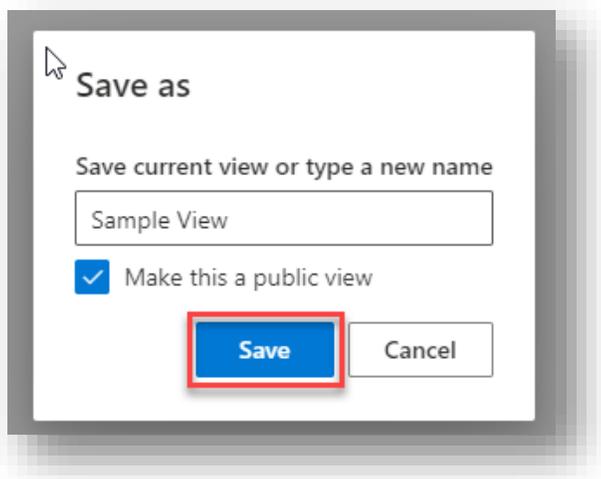
Creating a new view

- Click on "Save view as" to save your current view as a new view.

- Enter the name of the view and click on "Save".
  Note: For creating a private view, uncheck "Make this a public view".

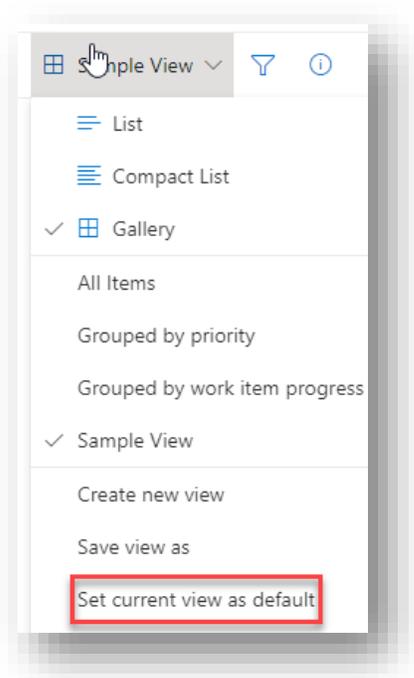- For saving the view as default, click on "Set current view as default".

SPO Members - Lists User Guide

Ministry of SaskBuilds and Procurement

This document provides instructions and support for utilizing the many features available in SharePoint Lists.

Last revised: February 2021
Last reviewed: February 2021
Next review: February 2022

- For creating a calendar view, click on "Create new view".

- Select "Calendar" under "Show as", select columns for "Start Date" and "End Date" and select a column to appear in title for the calendar. Click on "Create".

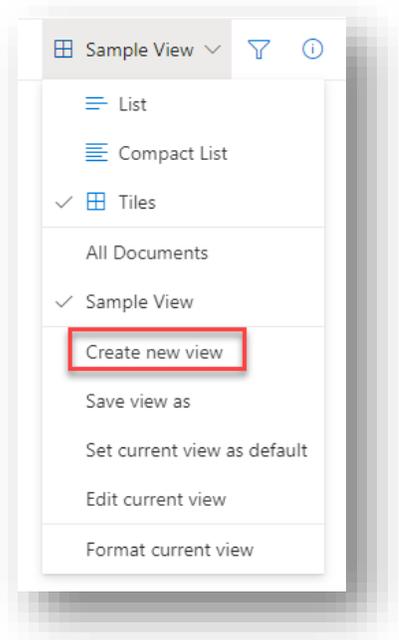# SPO Members - Lists User Guide

Last revised: February 2021
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Ministry of SaskBuilds and Procurement

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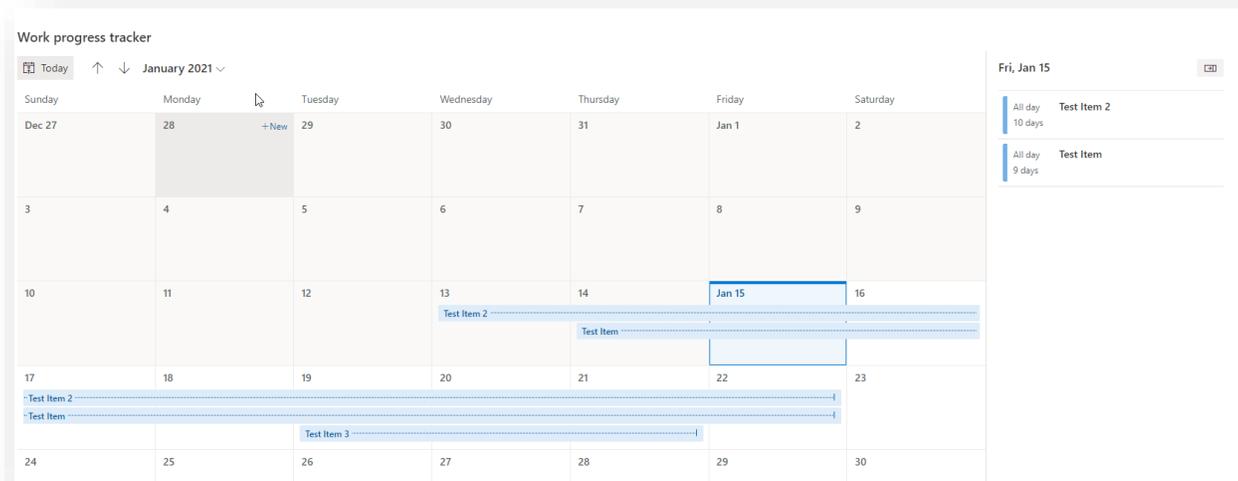
Columns or Properties
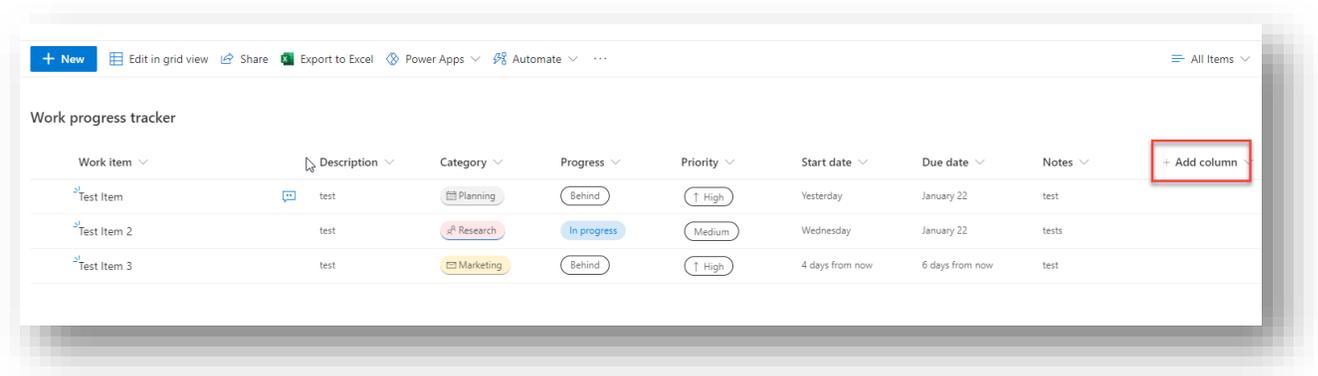
Add a new column

- Click on "Add column".
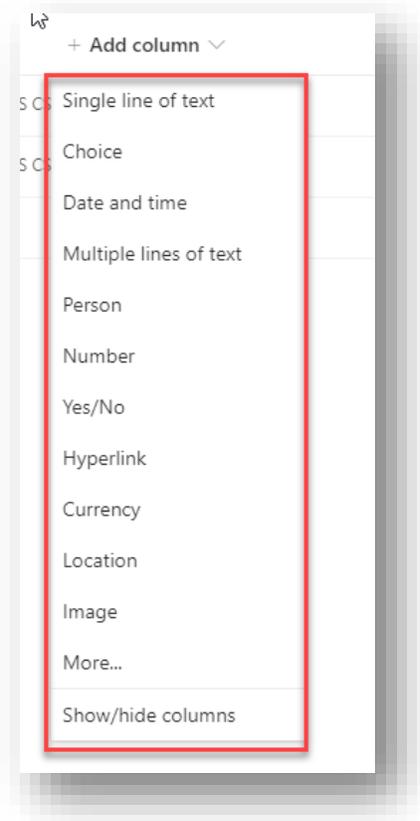
SPO Members - Lists User Guide

Last revised: February 2021
Last reviewed: February 2021
Next review: February 2022

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- Select the type of column you want to add.

- Fill in the details and click "Save".

Edit a column

- To edit a column, click on column name and select "Column Settings" >> "Edit".

SPO Members - Lists User Guide

Last revised: February 2021
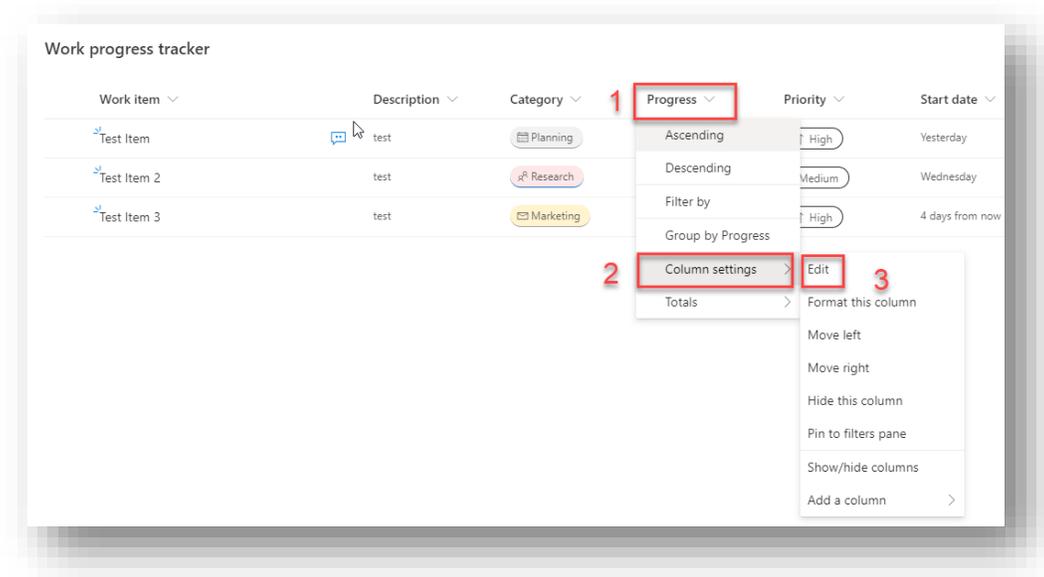Last reviewed: February 2021
Next review: February 2022

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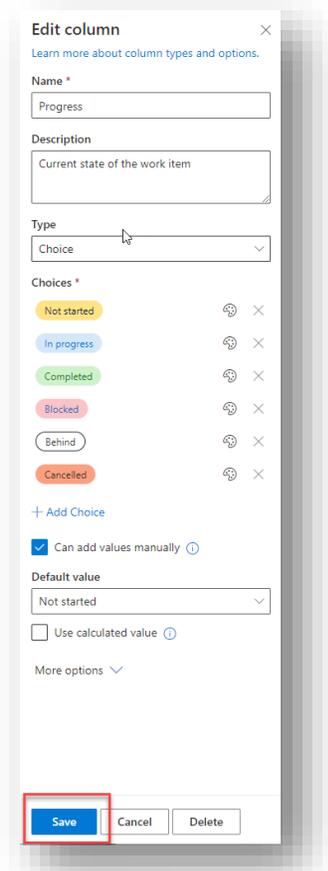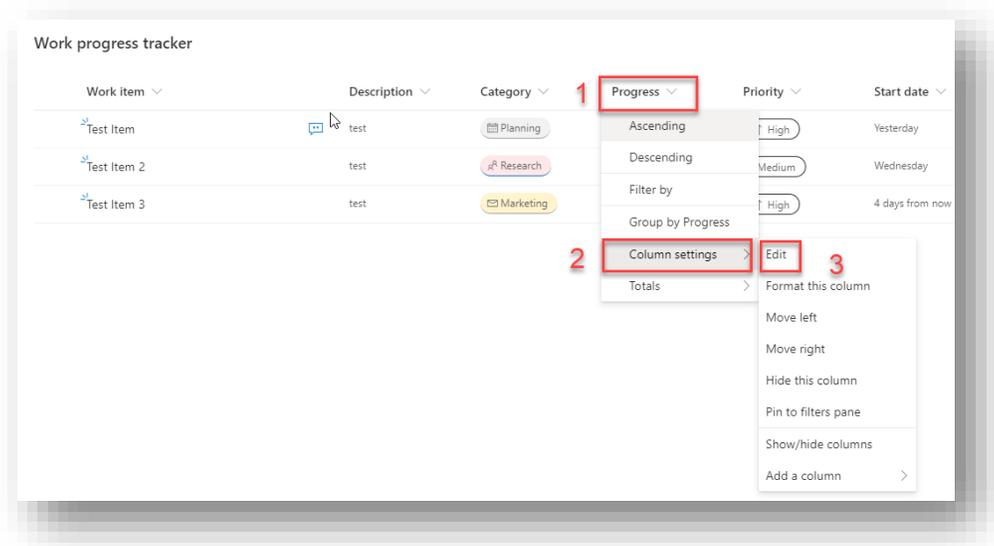
- Make changes and click "Save".
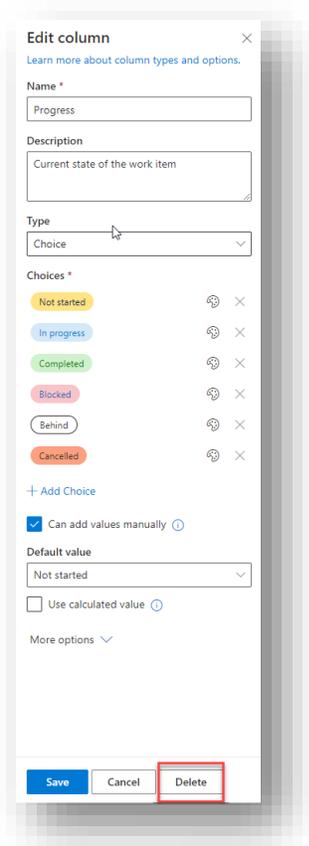
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Delete a column

- To delete a column, click on column name and select "Column Settings" >> "Edit".

- Click on "Delete".

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SPO Members - Lists User Guide

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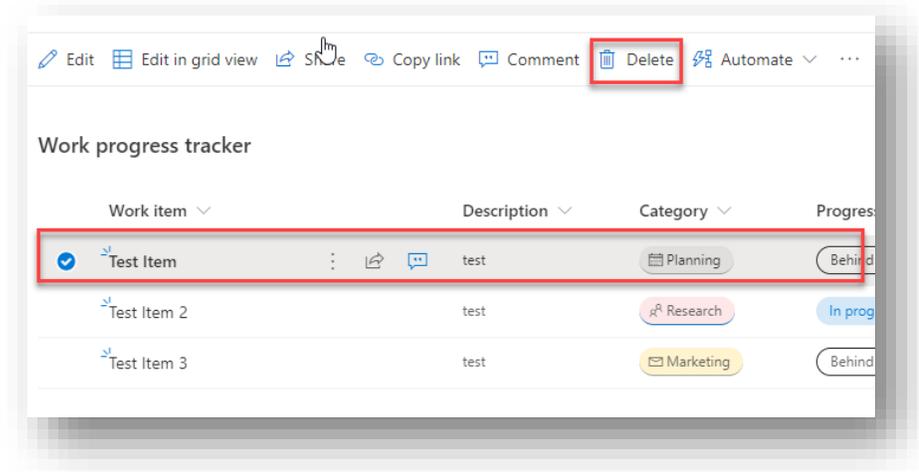
Delete item(s)

- Select item(s) and click "Delete".

Request sign-off on an item

- Select the item you want approval on, click "Automate" >> "Request sign-off".

- Click on "Create flow".

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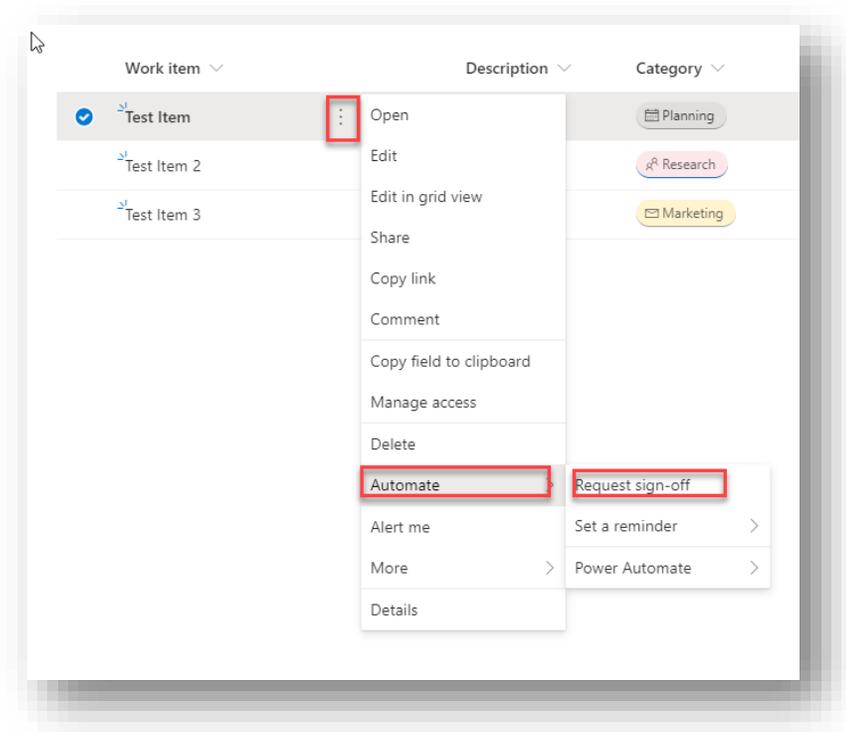**Next review: February 2022**

- Select "Approver", "Message for approver" and click on "Run flow".

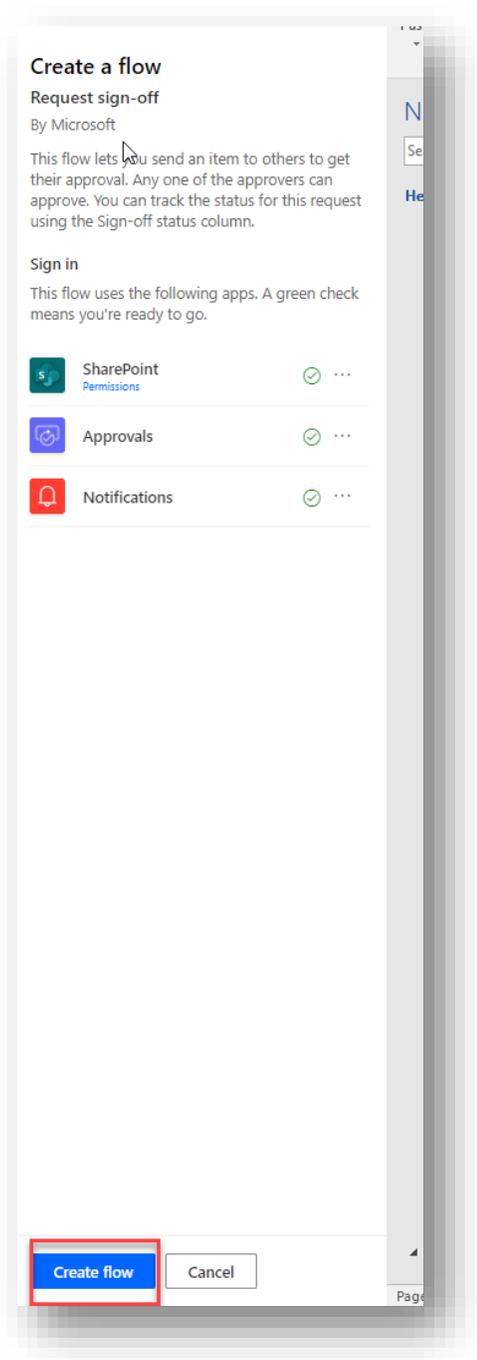# SPO Members - Lists User Guide

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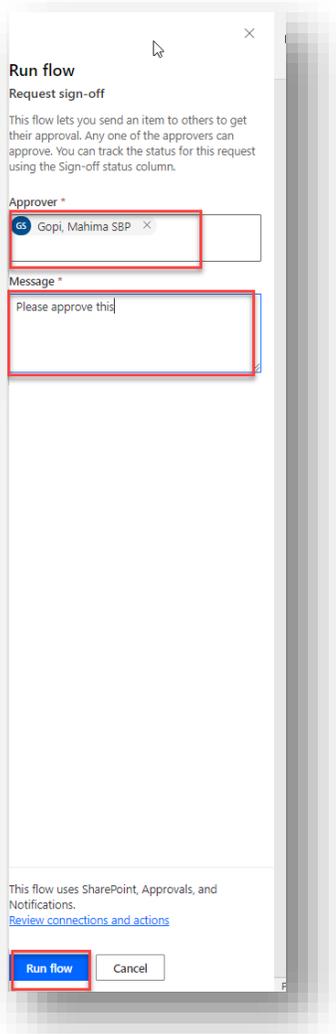
- Sign-off status will appear as "Pending".

- Approver will get an email to approve or reject the document.
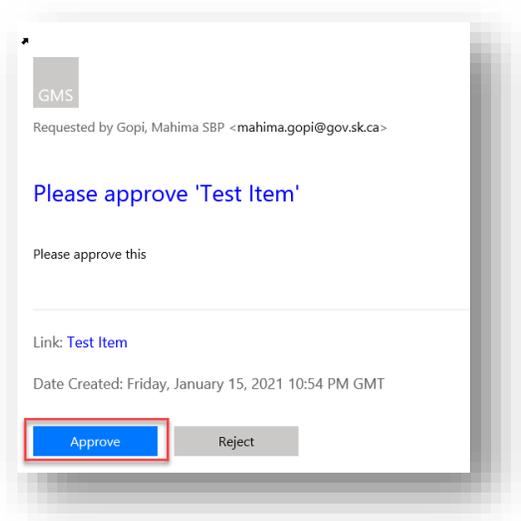
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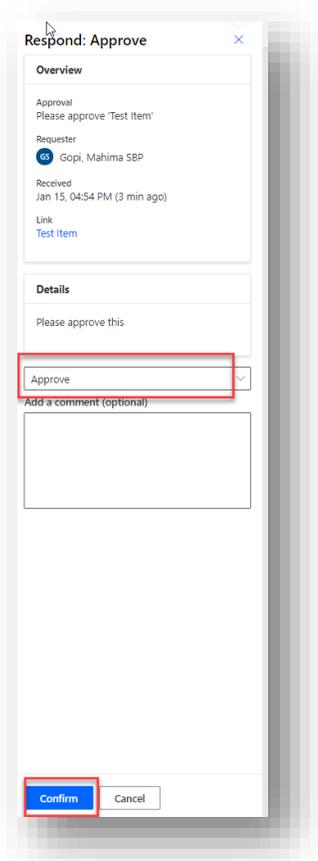Last reviewed: February 2021
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- Approver can click on "Approve" or "Reject" in the email and click on "Confirm" on the next screen.

- Sign-off status will change to "Approved" after the approver approves it.

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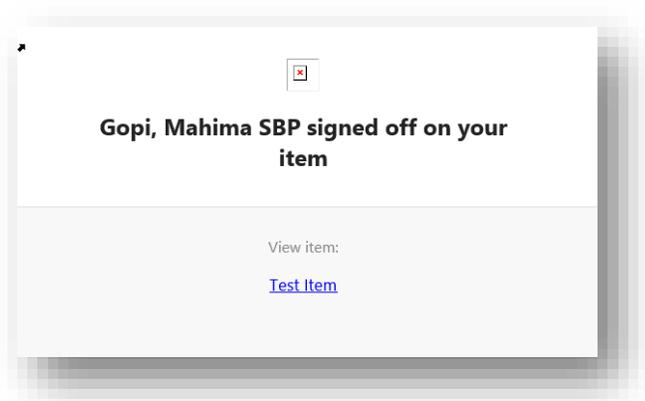Last reviewed: February 2021
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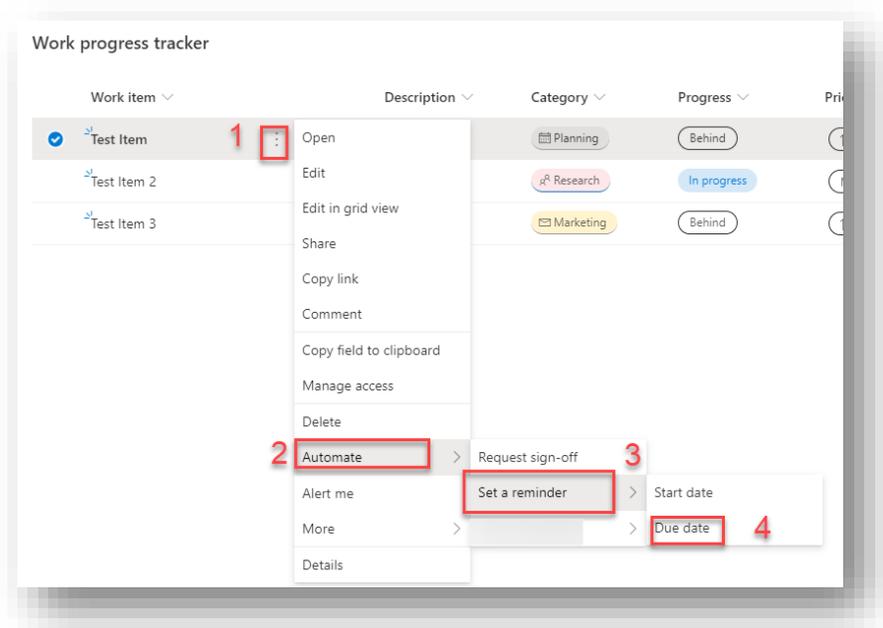
- Requester will get an email notification about the approval status.

Set a Reminder

- Select the item, click "Automate" >> "Set a Reminder" >> "Due Date".

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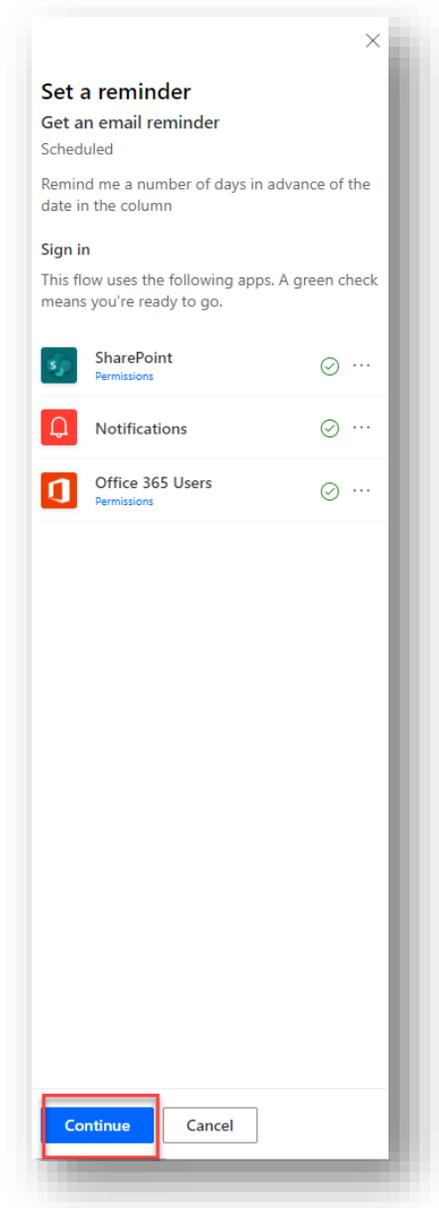
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- Click on "Create flow".

- Enter the number of days before you would like to be reminded and click "Create".

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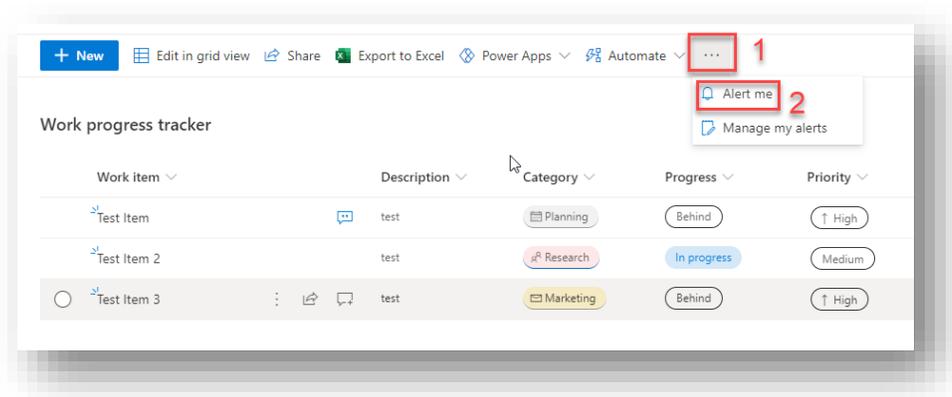**Next review: February 2022**

Alerts

Set alerts on a list

- To set up alerts on a list, click on "…" >> "Alert me".
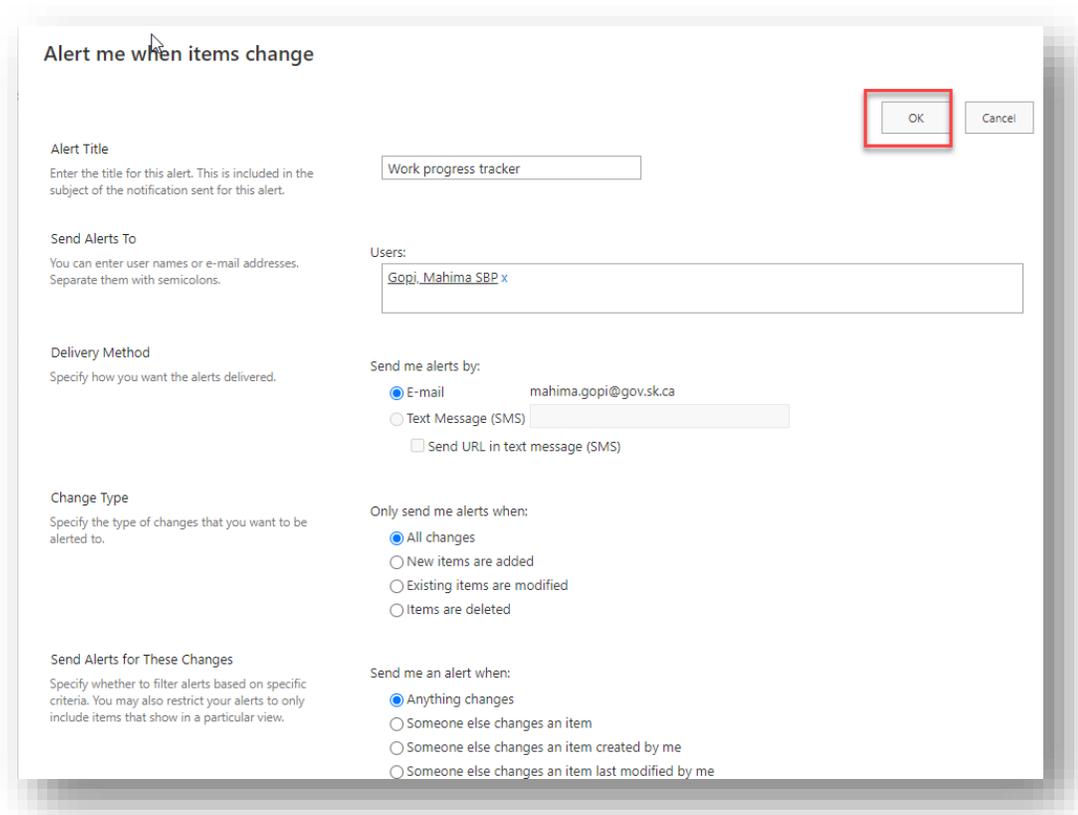
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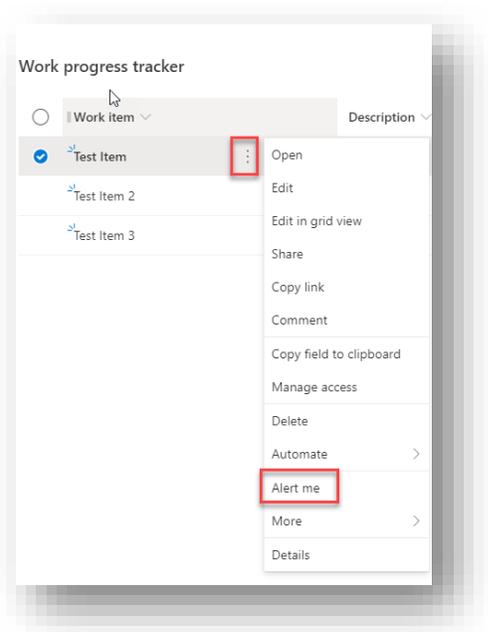- Fill in alert details and click "OK".

Set alerts on a single item

- To set up alerts on single item, select the item and select "Alert me" from the menu.

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- Fill in alert details and click "OK".

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