COURSE OUTLINE

MICROSOFT LSITS FOR END USERS

Course Duration: 1 Day

Overview

This course delivers an instructor-led breakdown of Microsoft Lists. Students will be taught how to empower their data and become organised with a rich range of customisable table types. We will take users through a selection of well-crafted lessons to help design modern ways of working with data for their business that will include blending your list with other Office 365 services.

Audience

This class can benefit a wide range of users that are looking at modern ways of working with data. This may be tracking assets, tasks, events and more in an engaging way that keeps people aware of evolving business narrative.

Prerequisites

As a minimum requirement for this course, delegates need to be proficient in using both a Windows desktop and web browsers. For the training delegates will require access to their own choice of web browser including Chrome, Firefox and Edge.

Module List

Module 1: An introduction to Microsoft Lists

Let's get started with an introduction to Microsoft Lists. In this module you will learn more about the origins of the Microsoft Lists product and where it fits in Office 365. You will discover the business benefits of this tool and how it can be integrated into other Office 365 services. Lists is an incredibly versatile tool and can form the backbone of many customised business services when combined with the power platform and other apps.

Topics Covered

What is Microsoft Lists?

How can lists help me in my role?

How does lists benefit from other Office 365 services?

Introducing Microsoft SharePoint

How does Microsoft Lists fit into SharePoint?

Types of lists

An overview of columns and views

An overview of list settings

Module 2: Getting started with Microsoft Lists

To begin our journey through the Microsoft Lists product, we will begin by looking at some of the templates that are available to view and edit. Microsoft's templates are a good starting point for discovering what the product is capable off and how that can be achieved. We will also tour of a list and discover where we can customise the list so that students are familiar with the interface that they will be using over the one-day course. We will also build our first list from an Excel file, showing students how to upgrade their existing data sources into a new list. We also discuss how to configure your list settings and how to introduce new types of columns and views.

Topics Covered

Navigating to Microsoft Lists

Creating a new list

My lists vs SharePoint lists

Creating a new list from an Excel file

Customising list settings

Adding columns

Managing and removing columns

Creating views

Managing and removing views

Working in lists

Adding data to a list

Editing single or multiple records

Version history

Delete and restore records

Delete and restore lists

Alerts

Manage access to a list

Share a list

Manage inheritance

Embed your lists into other Office 365 services

Module 3: Advanced columns and formatting

In our next module we will be looking at more advanced logic within Microsoft Lists. This will include a range of advanced columns that are derived by SharePoint that will greatly benefit your end users experience when using your list. This is a low-code/no-code module so only simple formulas will be leveraged to bring calculations to your columns. We will also explore formatting which helps you control the look and feel of your list based on the data within it. We will learn about how to use design mode to implement these changes and how more advanced users can leverage advanced mode to apply JSON code to a column or view.

Topics Covered

Advanced column types

Managed metadata

Calculated columns

Lookup columns

Location columns

Implementing formatting

Using design mode for columns

Using design mode for views

How to use advanced mode

Module 4: Customise your data entry form

The gateway to adding data to your list is its form. If you would like to customise this form, there are a couple of ways to do this. You may choose to simply reorder or remove fields, and this can be done directly from the list. For more advanced scenarios like branding a form or adding additional logic, you will need to use Power Apps. Power Apps works hand in hand with lists, offering a range of ways to improve your end user form experience. In this module we will show you how to make quick changed to your form directly in Microsoft Lists and how to enhance a form even further with Power Apps. We will also discuss how Power Apps can turn your list into a new mobile app.

Topics Covered

Customising a list form

Introducing Power Apps

Editing a form in Power Apps

Adding images

Changing colours

How to manage input visibility

Using conditional formatting

Publishing your updates

Reverting to the default form

Turning your list into a mobile app

Module 5: Trigger business processes

In our last module we will explore using our lists to trigger common business processes. These could range from a simple notification to pop up in a Microsoft Teams chat to an approval request sent to a user's mailbox. The benefit of our lists is that it contains a wealth of information that can be leveraged in an automated business process. Using Microsoft Power Automate, directly from your list, we can begin to explore how we can use helpful templates to quickly implement common business processes based around events in our list, for example submitting a new record.

Topics Covered

What are business processes?

What are rules?

Adding rules to lists

Managing rules

What is Power Automate

How do flows start in a list

How to add design-free flows to a list

How to add flow templates to a list

Working with actions in a flow

Save and test a flow

Your Learning Roadmap: What Next?

If you have completed this class or you have equivalent knowledge, we recommend looking at our course outlines for the following classes to enhance your knowledge:

Office 365 Users

- Power BI for end users
- Power Automate for end users
- Power Apps for end users
- Microsoft Teams for end users
- Office 365 for end users

SharePoint Power Users

- SharePoint Online for power users
- SharePoint Online Branding
- SharePoint 2010 - 2019 for power users
- Nintex Workflow 2010 - 2019
- Nintex Forms 2010 - 2019

SharePoint Farm Administrators

- Core Skills for Server Administrators
- Advanced Infrastructure
- Office 365 Identities and Services

SharePoint Developers

- Developer Track

For additional courses or more information on the above visit: http://www.combined-knowledge.com and click on Find a Training Course.

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Created by the SharePoint experts at Combined Knowledge, CBT (Computer Based Training) helps your users become familiar with all key aspects of SharePoint from the comfort of their desks using a variety of effective delivery methods including hands-on exercises, illustrated examples and videos.

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