

Introduction to lists

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A list is a collection of information that you share with team members. For example, you can create a sign-up sheet for an event or track team events on a calendar.

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Overview

When you create a Microsoft Office SharePoint Server 2007 site, several types of lists are created for you. These default lists range from a discussion board to a calendar list.

You can customize and add items to these lists, create additional lists from the list templates that are already available, and create custom lists with just the settings and columns that you choose.

You can view a list in several different ways. For example, you can provide a view on one page of all tasks and a view on another page of just the tasks that are due today. You can also use folders to organize your list items. For example, you can view just the current events from a calendar on a home page and create a visual view — similar to a wall calendar — on another page.

Do you have data in a spreadsheet that you want to use in a list on a SharePoint site? You can create a new list, including the columns and data, by importing a spreadsheet.

If you have database programs installed, such as Microsoft Office Access 2007, and your browser supports Microsoft ActiveX Controls, you can integrate your list data with database tools such as queries, joins, and reports.

Lists can also be displayed in **Web Parts** on pages on your site. Web Parts are the building blocks of a Web site, and you can use them to add items directly from a list to a Web Part Page. You can also open a list directly and work with

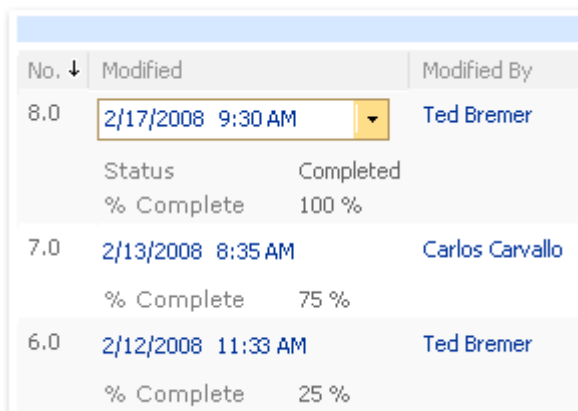
it. For example, the default **Announcements** list appears in a Web Part on a new Team site home page, but you can also click the title of the list to open and work with it on its own page.

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Ways to work with lists

The following are some ways you can work with lists to help you to manage information for your group.

Track versions and detailed history You can track versions of list items, so that you can see which items have changed from version to version, as well as who changed the list items. If mistakes are made in a newer version, you can restore a previous version of an item. Tracking the history of a list is especially important if your organization needs to monitor a list as it evolves.



No. ↓	Modified	Modified By
8.0	2/17/2008 9:30 AM	Ted Bremer
	Status	Completed
	% Complete	100 %
7.0	2/13/2008 8:35 AM	Carlos Carvalho
	% Complete	75 %
6.0	2/12/2008 11:33 AM	Ted Bremer
	% Complete	25 %

Require approval You can specify that approval for a list item is required before it can be viewed by everyone. Items remain in a pending state until they are approved or rejected by someone who has permission to approve them. You can control which groups of users can view a list item before it is approved.

Integrate e-mail with a list If incoming or outgoing e-mail messages have been enabled on your site, lists can take advantage of e-mail features. Some lists, such as calendars, can be set up so that people can add content to them by sending messages. Other lists, such as a task list, can be set up to send messages to people when items are assigned to them. Your organization can customize other types of lists to receive messages.

Customize permissions You can specify whether participants for your list can read and edit only the items they created or all items in the list. People who have permission to manage lists can read and edit all list items.

You can also apply specific permission levels to a single list item, for example, if the issue contains confidential information.

Create and manage views Your group can create different views of the same list. The contents of the actual list don't change, but the items are organized or filtered so that people can find the most important or interesting information, depending on their needs.

Use formulas and calculated values You can use formulas and calculated values to dynamically generate information in the columns of a list. The operations can include information from one or more other columns in a list as well as system functions such as [today] to indicate the current date. For example, you can specify a default due date that is seven days from the current date.

Keep informed about changes Lists and views in Office SharePoint Server 2007 now use RSS, so that members of your workgroup can automatically receive updates. RSS is a technology that enables people to receive and view updates or RSS feeds of news and information in a consolidated location. You can also create e-mail alerts to notify you when the lists are changed or when new items are added. Alerts are a convenient way to keep track of the changes that are important to you.

Share list information with a database program If you have a database program installed, such as Microsoft Office Access 2007, you can export and import data to and from your site, as well as link a table from the database to a SharePoint list. When you work with your list data in a database, you can analyze it as you analyze any data, such as by using queries, joins, and reports.

Use lists consistently across sites If your group works with several types of lists, you can add consistency across multiple lists with **content types**, site columns, and templates. These features enable you to reuse the settings and list structure in an efficient way. For example, you can create a content type for a customer service issue that specifies certain columns (such as customer contact) and business processes for the content type. Another example is creating a site column for department names that has a drop-down list of departments. You can reuse the column in multiple lists to ensure that the names always appear the same way in each list.

Find links to more information about content types, site columns, and list templates in the **See Also** section.

Work on list items from an e-mail program By using an e-mail program that is compatible with Office SharePoint Server 2007, you can take important list information with you. For example, with Microsoft Office Outlook 2007, you can view and update tasks, contacts, and discussion boards on your site from Outlook.

Set content targeting Items in a Microsoft Office SharePoint Server 2007 list can be published to appear only to people who are members of a particular group or audience. This is accomplished by using Web Parts, such

as the Content Query Web Part, that uses audience-targeting data to filter the list contents based on the user's context. Before the items in a list can be enabled for a particular audience, the list itself must be set up with the **Audience Targeting** column.

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Types of lists

The type of list that you use depends on the kind of information that you are sharing.

Announcements Use an announcements list to share news and status and to provide reminders. Announcements support enhanced formatting with images, hyperlinks, and formatted text.

Contacts Use a contacts list to store information about people or groups that you work with. If you are using an e-mail or contact management program that is compatible with Office SharePoint Server 2007, you can view and update your contacts from your SharePoint site in the other program. For example, you can update a list of all your organization's suppliers from Office Outlook 2007. A contacts list doesn't actually manage the members of your site, but it can be used to store and share contacts for your organization, such as a list of external vendors.

Discussion boards Use a discussion board to provide a central place to record and store team discussions that is similar to the format of newsgroups. If your administrator has enabled lists on your site to receive e-mail messages, discussion boards can store e-mail discussions from most common e-mail programs. For example, you can create a discussion board for your organization's new product release. If you are using an e-mail program that is compatible with Office SharePoint Server 2007, you can view and update your discussion board while working in the other program.

Links Use a links list as a central location for links to the Internet, your company's intranet, and other resources. For example, you might create a list of links to your customers' Web sites.

Calendar Use a calendar for all of your team's events or for specific situations, such as company holidays. A calendar provides visual views, similar to a desk or wall calendar, of your team events, including meetings, social events, and all-day events. You can also track team milestones, such as deadlines or product release dates, that are not related to a specific time interval. If you are using an e-mail or calendar program that is compatible with Office SharePoint Server 2007, you can view and update your calendar from your SharePoint site while working in the other program. For example, you can compare and update your calendar on the SharePoint site with dates from your Office Outlook 2007 calendar, by viewing both calendars side-by-side or overlaid with each other in Office Outlook 2007.

Tasks Use a task list to track information about projects and other to-do events for your group. You can assign tasks to people, as well as track the status and percentage complete as the task moves toward completion. If you are using an e-mail or task management program that is compatible with Office SharePoint Server 2007, you can view and update your tasks from your SharePoint site in your other program. For example, you can create a task list for your organization's budget process and then view and update it in Office Outlook 2007 along with your other tasks.

Project tasks To store task information with a visual or Gantt view with progress bars, use a project task list. You can track the status and percentage complete as the task moves toward completion. If you are using an e-mail or task management program that is compatible with Office SharePoint Server 2007, you can view and update your project tasks from your SharePoint site in your other program. For example, you can create a task list on your SharePoint site to identify and assign the work to create a training manual, and then you can track your organization's progress from Office Outlook 2007.

Issue tracking Use an issue-tracking list to store information about specific issues, such as support issues, and track their progress. You can assign issues, categorize them, and relate issues to each other. For example, you can create an issue-tracking list to manage customer service problems and solutions. You can also comment on issues each time you edit them, creating a history of comments without altering the original description of the issue. For example, a customer service representative can record each step taken to resolve a problem and the results. You can also use an Issue Tracking list with a Three-state workflow to help your organization manage issue or project tracking.

Survey To collect and compile feedback, such as an employee satisfaction survey or a quiz, use a survey. You can design your questions and answers in several different ways and see an overview of your feedback. If you have a spreadsheet or database program installed that is compatible with Microsoft Windows SharePoint Services (version 3) or Microsoft Windows SharePoint Services 2.0, you can export your results to further analyze them.

Custom Although you can customize any list, you can start with a custom list and then customize just the settings that you specify. You can also create a list that is based on a spreadsheet, if you have a spreadsheet program that is compatible with Microsoft Windows SharePoint Services (version 3) or Windows SharePoint Services 2.0, and Microsoft Internet Explorer and Microsoft Windows. For example, you can import a list from Microsoft Office Excel 2007 that you created to store and manage contracts with vendors.

Additionally, you can easily integrate and incorporate information from business applications such as SAP, Siebel, and Microsoft SQL Server into an Office SharePoint Server 2007 site by adding the business data column type to an

Office SharePoint Server 2007 list. By adding the business data column type to a list, you can have a list of items that uses a combination of columns from Office SharePoint Server 2007 and from an external business application.

Languages and Translators You can create a Languages and Translators list to use with a Translation Management workflow in a Translation Management Library. The workflow uses the list to assign translation tasks to the translator specified in the list for each language. You can create this list manually, or you can choose to have this list automatically when you add a Translation Management Workflow to a Translation Management library.

KPI List Key Performance Indicators allow you to quickly evaluate the progress made against measurable goals. You can set up KPI lists to track performance by using one of four data sources: manually entered data, data in a SharePoint list, data in Microsoft Office Excel workbooks, or data from Analysis Services — a component of Microsoft SQL Server 2005. After the KPI list is created, anyone who has permissions on the list can use it to display the status of the indicator on a dashboard page.

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