

MICROSOFT LISTS 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 organized with a rich range of customizable 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 browsers including Chrome, Firefox, and Edge.

Module List

Module 1

An introduction to Microsoft Lists

Module 2

Getting started with Microsoft Lists

Module 3

Advanced columns and formatting

Module 4
Customize your data entry form

Module 5
Trigger business processes

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 customized business services when combined with the power platform and other apps.

Topics Covered

- What is Microsoft Lists?
- An overview of columns and views
- How can lists help me in my role?
- An overview of list settings
- How does Lists benefit from other Office 365 services?
- Introducing Microsoft SharePoint
- How does Microsoft Lists fit into SharePoint?
- Types of lists

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 of and how that can be achieved. We will also tour a list and discover where we can customize 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
- Adding data to a list
- Creating a new list
- Editing single or multiple records

- My lists vs SharePoint lists
- Version history
- Creating a new list from an Excel file
- Delete and restore records
- Customizing list settings
- Delete and restore lists
- Adding columns
- Alerts
- Managing and removing columns
- Manage access to a list
- Creating views
- Share a list
- Managing and removing views
- Manage inheritance
- Working in lists
- 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
- Implementing formatting
- Managed metadata
- Using design mode for columns
- Calculated columns
- Using design mode for views
- Lookup columns
- How to use advanced mode
- Location columns

Module 4: Customize your data entry form

The gateway to adding data to your list is its form. If you would like to customize 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 changes 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

- Customizing a list form
- How to manage input visibility
- Introducing Power Apps
- Using conditional formatting
- Editing a form in Power Apps
- Publishing your updates
- Adding images
- Reverting to the default form
- Changing colors
- 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 they contain 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?
- How do flows start in a list
- What are rules?
- How to add design-free flows to a list
- Adding rules to lists
- How to add flow templates to a list
- Managing rules

- Working with actions in a flow
- What is Power Automate
- Save and test a flow