

55302 : Microsoft Lists for End Users

Course Outline

Module 1: An Introduction to Microsoft Lists

Description:

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.

Lessons:

- What is Microsoft Lists?
- How can lists help me in my role?
- How does lists benefit 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

Lab 1: Setting up a new Team

- Download our training files
- Create a new Microsoft Team

Outcomes:

- Understand when and where to use a list
- Describe how columns and views make up a list
- Explain how lists can benefit other Office 365 services
- Set up a SharePoint site or Team for collaborative lists

Module 2: Getting Started with Microsoft Lists

Description:

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 take the chance to have a tour of a list and 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 will also discuss how to configure your list settings and how to introduce new types of columns and views.

Lessons:

- Navigating to Microsoft Lists
- Creating a new list
- My lists vs SharePoint lists
- Creating a new list
- Creating a new list from an Excel file
- Customizing list settings

- Adding columns
- Managing and removing columns
- Creating views
- Managing and removing views
- Adding data to a list
- Editing single or multiple records
- Version history
- Delete and restore records
- Delete and restore lists
- Embed your lists into other Office 365 services

Lab 1: Getting Started

- Create a new list from a template
- Add new columns
- Customize your default view
- Add a new view
- Add records to your list
- Recover from a mistake
- Delete and recover a record
- Embed a list in a Team

Outcomes:

- Build a useful list using templates in minutes
- Make simple changes to existing lists
- Know how columns and views are used in Microsoft Lists
- Be able to add new records to a list
- Restore a previous version of a record
- Remove lists, columns, and views

Module 3: Advanced Columns and Formatting

Description:

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-user 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.

Lessons:

- Advanced column types
- Managed metadata
- Calculated columns
- Using lookup columns
- Geolocation columns
- Implementing formatting
- Using design mode for columns
- Using design mode for views
- How to use advanced mode

Lab 1: Add advanced columns and apply formatting

- Create a new list from an Excel file
- Add advanced column types to the list
- Format your columns and views

Outcomes:

- Add a range of advanced column types to your list
- Understand the managed metadata service and its benefits
- Use formatting to customize list columns and views
- Understand where JSON code can be used to format a list

Module 4: Customize Your Data Entry Form

Description:

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 form. 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.

Lessons:

- Customizing a list form
- Introducing Power Apps
- Editing a form in Power Apps
- Adding images
- Changing colors
- How to manage input visibility
- Using conditional formatting
- Adding screens
- Building navigation
- Publishing your updates
- Reverting back to the default form
- Turning your list into a mobile app

Lab 1: Customize your form

- Remove unwanted fields from your form
- Open your form using Power Apps
- Apply a business logo to the form
- Hide a control based on another control
- Highlight a field as red if empty
- Publish and test your form

Outcomes:

- Understand when to make changes to a form in Microsoft Lists and when to use Power Apps
- Be aware of what Power Apps can deliver to both your list form and to your list as a whole
- Be able to make customizations to a list form using Power Apps
- Turn a list into a custom mobile app in minutes

Module 5: Trigger Business Processes

Description:

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.

Lessons:

- What is Power Automate?
- How do flows start in a list?
- How to add design-free workflows to a list
- How to add flow templates to a list
- Working with actions in a flow
- Save and test a flow
- Turn off or delete a flow

Lab 1: Design an approval process

- Create a new flow based on an existing template
- Customize the flow to combine Teams with an approval process
- Save and test your flow

Outcomes:

- Understand how to trigger processes from your list using Power Automate
- Feel comfortable adding, editing, and removing actions in a flow
- Know how to manage a flow associated with a list