COURSE OVERVIEW

Course Name:
Microsoft Lists for End Users

COURSE DURATION: 1 Day

Gauteng:
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COURSE OVERVIEW

Microsoft Lists is a Microsoft 365 app that helps you track information and organize work. Lists are simple, smart, and flexible, so you can stay on top of what matters most to your team. Track issues, assets, routines, contacts and more using smart rules and alerts to keep everyone in sync.

COURSE OBJECTIVES

You will see how to design modern ways of working with data for your business that will include blending your list with other Office 365 services.

You will

- Understand where to set up a list and its availability.
- Implement a range of templates.
- Configure list settings.
- Customise existing columns and add new columns.
- Design calculated columns.
- Use lookup columns.
- Add managed metadata.
- Design new views.
- Format existing views.
- Use lists on mobile devices.
- Design custom forms
- Integrate lists with business processes.

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COURSE OUTLINE

Module 1: 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.

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, views and list settings

Module 2: Getting Started with Microsoft Lists

We will begin by looking at some of the templates that are available to view and edit. We will also build our first list from an Excel file, showing you how to upgrade your 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
- Creating a new list
- My lists vs SharePoint lists
- Creating a new list
- Customising list settings
- Managing and removing columns
- Managing and removing views
- Adding data to a list
- Version history
- Delete and restore records
- Delete and restore lists
- Embed your lists into other Office 365 services

Module 3: Advanced columns and formatting

We will be looking at a range of advanced columns that will greatly benefit your end users experience when using your list. We will also explore formatting which controls the look and feel of your list based on the data within it.

Lessons
- Advanced column types
- Managed metadata
- 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. 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.

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

Module 5: Trigger business processes

We will explore using your lists to trigger common business processes. Using Microsoft Power Automate, directly from your list, you can use helpful templates to quickly implement common business processes based around events in your 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

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