

Microsoft Lists to share with your team

Duration: 0,5 day

Audience: Pour tous

Who is this training for?

All Microsoft 365 users who need to create shared lists in collaborative mode in SharePoint and Teams.

Training objectives

- Distinguish a list from an Excel file.
- Create lists and manage their metadata.

Summary

Do you want to work as a team on shared lists and easily find what you're looking for? Excel doesn't seem to meet all your needs? In this training, our experts will teach you how to use Microsoft Lists to better share information with your work teams. Plus, you'll learn best practices for mastering the key functions of collaborating with Microsoft Lists.

Course outline

- Introduction to Microsoft Lists in the Microsoft 365 ecosystem.
- How to link lists to Excel.
- Create a list from the Microsoft Lists app.
- Create a list from an Excel file.
- Create columns and metadata in Lists.
- Use the list to refer to it from SharePoint (from libraries or other lists): Search column.
- Add items and edit metadata.
- Version history of each item (keep track).
- Alerts.
- Edit and create views.
- Possible display types

- Grid
- Calendar : to track a project for example
- Apply a conditional format (according to a column).
- Add reminders of certain events through Power Automate.
- Group and filter by a column.
- Create a form (Forms) and send the information to a list with Power Automate.
- Change the advanced settings of the list (let each user see only the form they have filled out).

Approach and methodology

- Lectures.
- Demonstrations.
- Directed and individual exercises.

Recommendations

Knowledge of the Microsoft 365 environment is highly recommended.