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Health Care Project Management Tip: Effectively Using SharePoint Lists

Leveraging SharePoint Lists

Widely used in health care, SharePoint helps users create not only public-facing Web sites and customizable intranets, but also practical, highly effective project sites that allow team members to stay on top of issues.

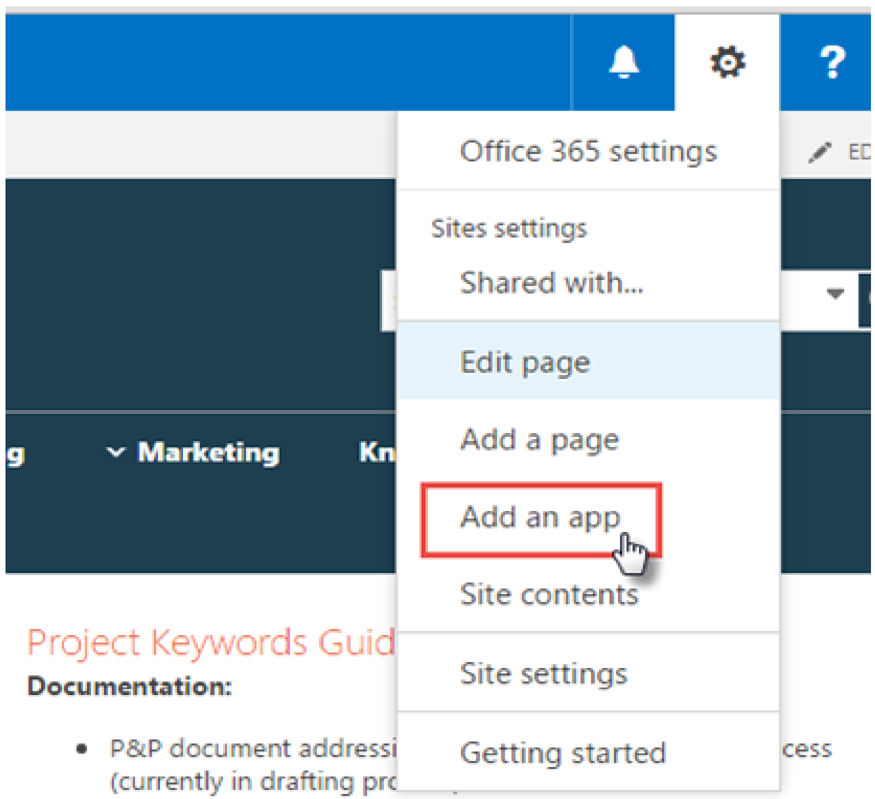
In this tech tip, we show how SharePoint's Issue Tracking app can help project overseers create lists to/for:

- Track issues and risks
- User acceptance testing
- Process change orders
- Request reports

There are also a couple bonus tips on how to Customize a list and Modifying columns

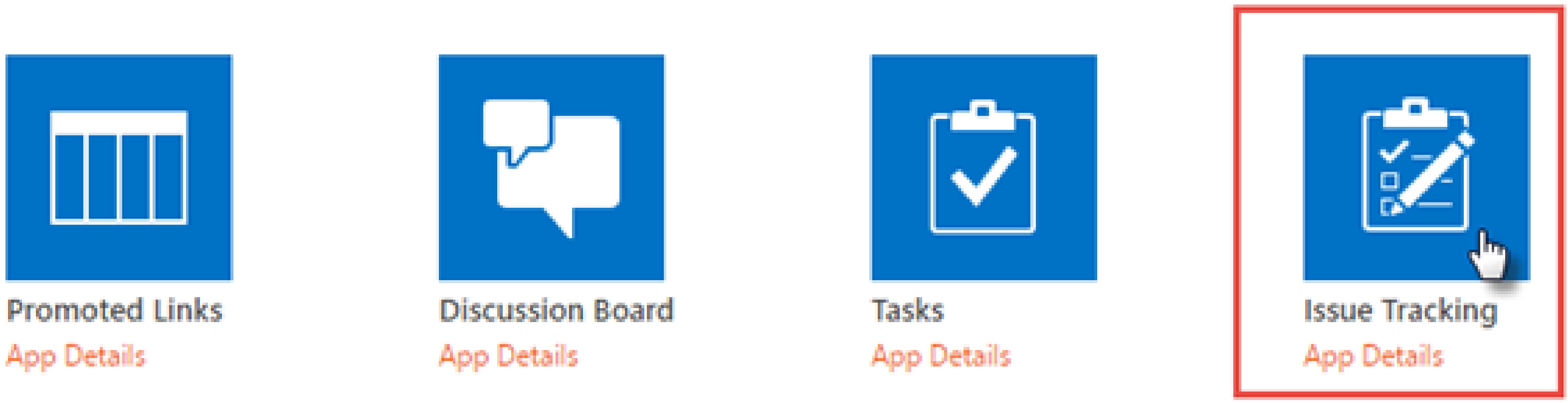
Creating SharePoint Lists: Step 1

Step 1: Click on the **Settings** icon (a gear image) within SharePoint and select **Add an app** from the menu**.**



Creating SharePoint Lists: Step 2

Step 2: Select the **Issue Tracking** app.



Creating SharePoint Lists: Step 3

Step 3: Click on **Advanced Options.**

Creating SharePoint Lists: Step 4

Step 4: Enter in a name & description for your list. For example, type: “Production Incidents” as the name and “Tracking list of production incidents, including status through lifecycle of resolution process” as the description. Select **Yes** to the question “Send e-mail when ownership is assigned?” This will enable SharePoint to automatically e-mail the person indicated in the “Assigned To” field for any particular issue entered by users. Click on **Create**.

Creating SharePoint Lists: Completion!

Voila – you've made a new issues tracking list!

Your list will enable authorized users on your team to document their issues in a centralized location that can be used to keep track of the details of the request and facilitate project management of the request through closure.

Bonus: Customizing SharePoint Lists

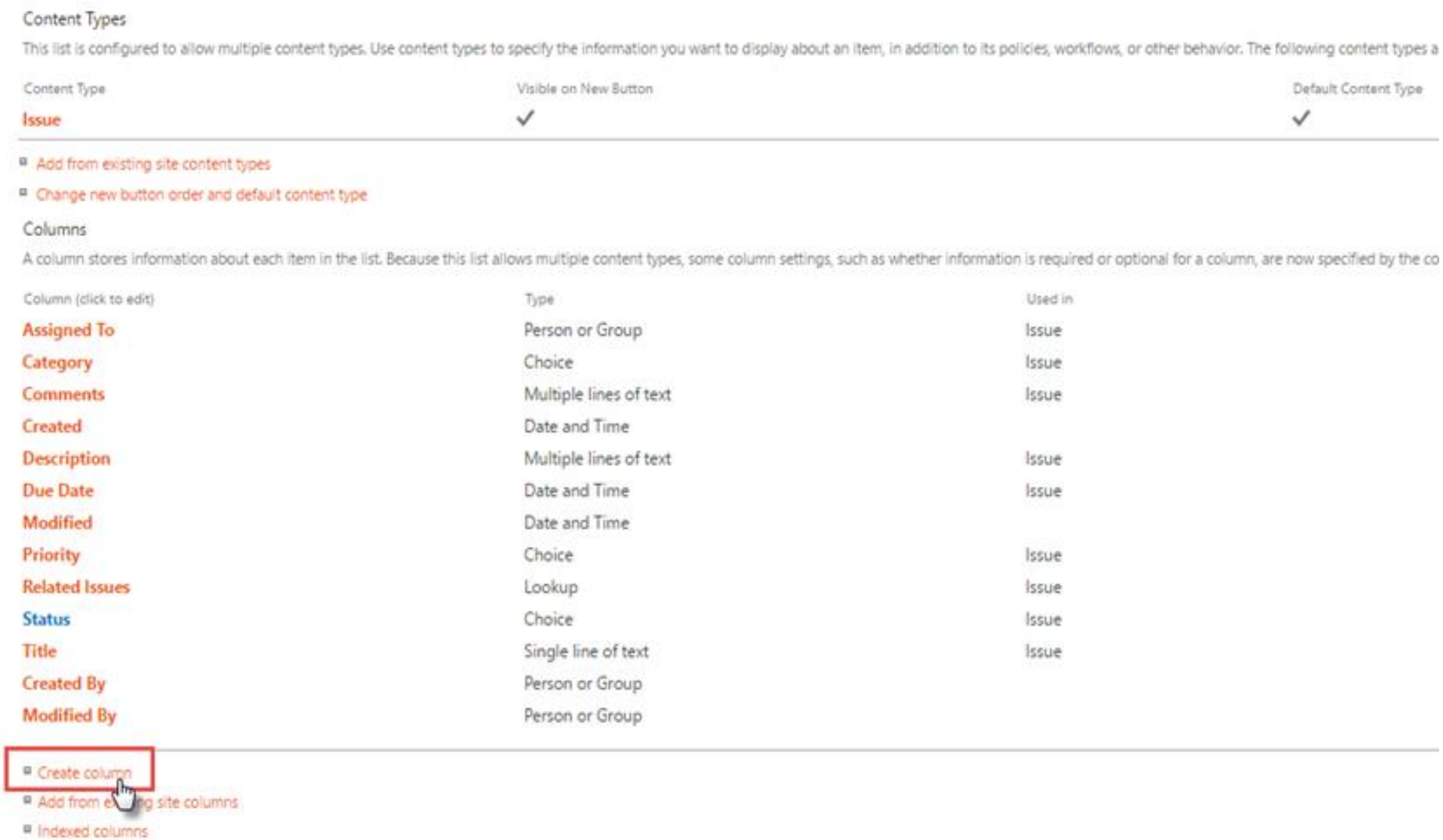
Customizing Lists for Added Benefit

While SharePoint's Issue Tracking app comes pre-formatted with basic column titles, such as Assigned To, Issue Status, Priority, Description, Category, Comments and Due Date, you do not need to limit yourself to these categories.

Instead, you can add new columns or modify or delete existing template columns.

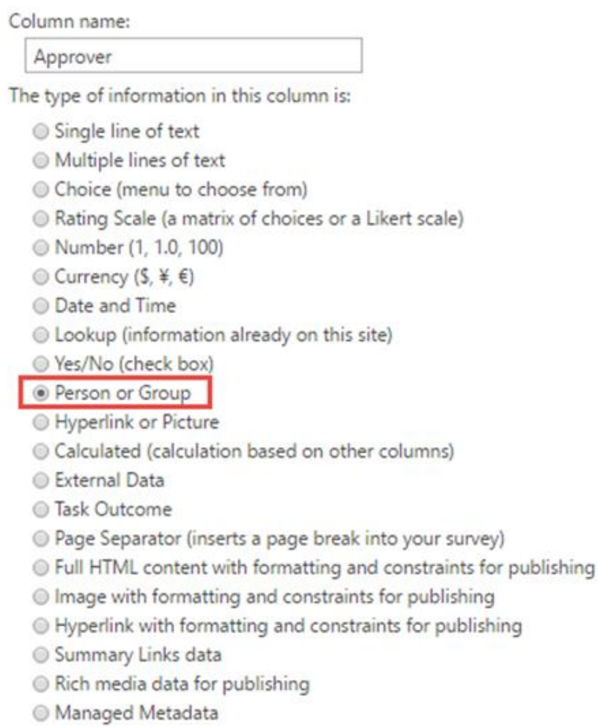
Customizing SharePoint Lists: Step 1

Step 1: Create a new column by selecting **Create column** from the **List Settings** page.



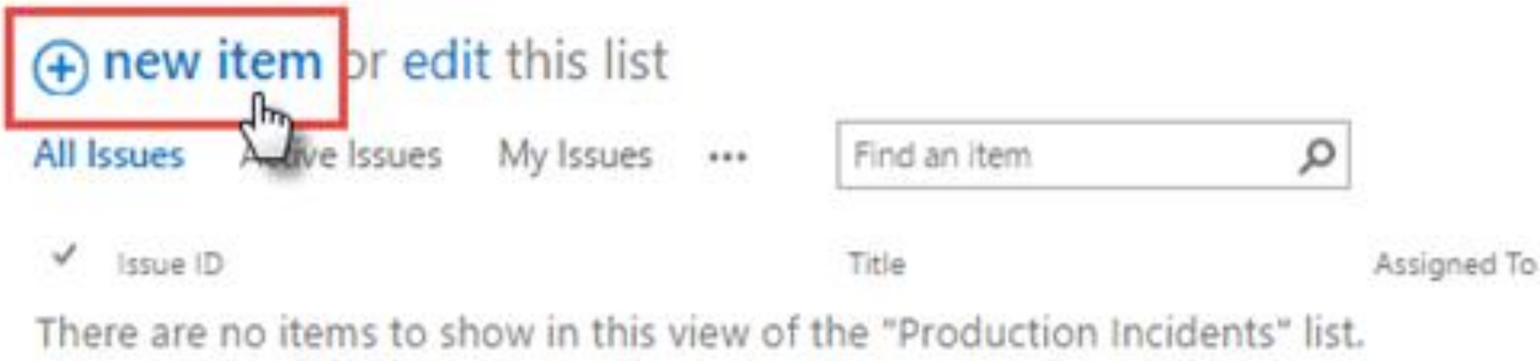
Customizing SharePoint Lists: Step 2

Step 2: SharePoint can accommodate many different types of information. For this example, create a column to capture the name of an **Approver** and by selecting the **Person or Group** radio button. This option links the column to the company directory in SharePoint. Click **OK** to commit your changes.



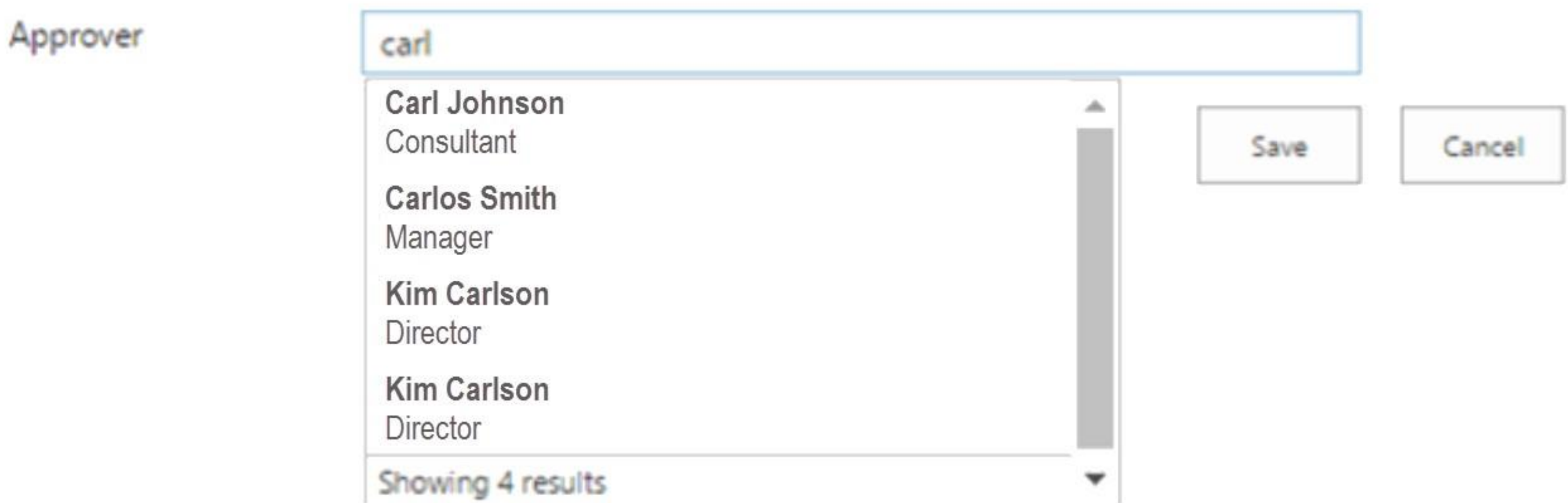
Customizing SharePoint Lists: Step 3

Step 3: Test your work by adding a new item. Click the **new item** link from your list's home page.



Customizing SharePoint Lists: Step 4

Step 4: Notice that predictive text displays results from the company directory when you start to type into the Approver field. Congratulations, you've added a new column!



Bonus: Modifying SharePoint Columns

SharePoint also allows you to modify the default columns available within the Issue Tracking app.

On the following slides, we show you how to modify an existing column.

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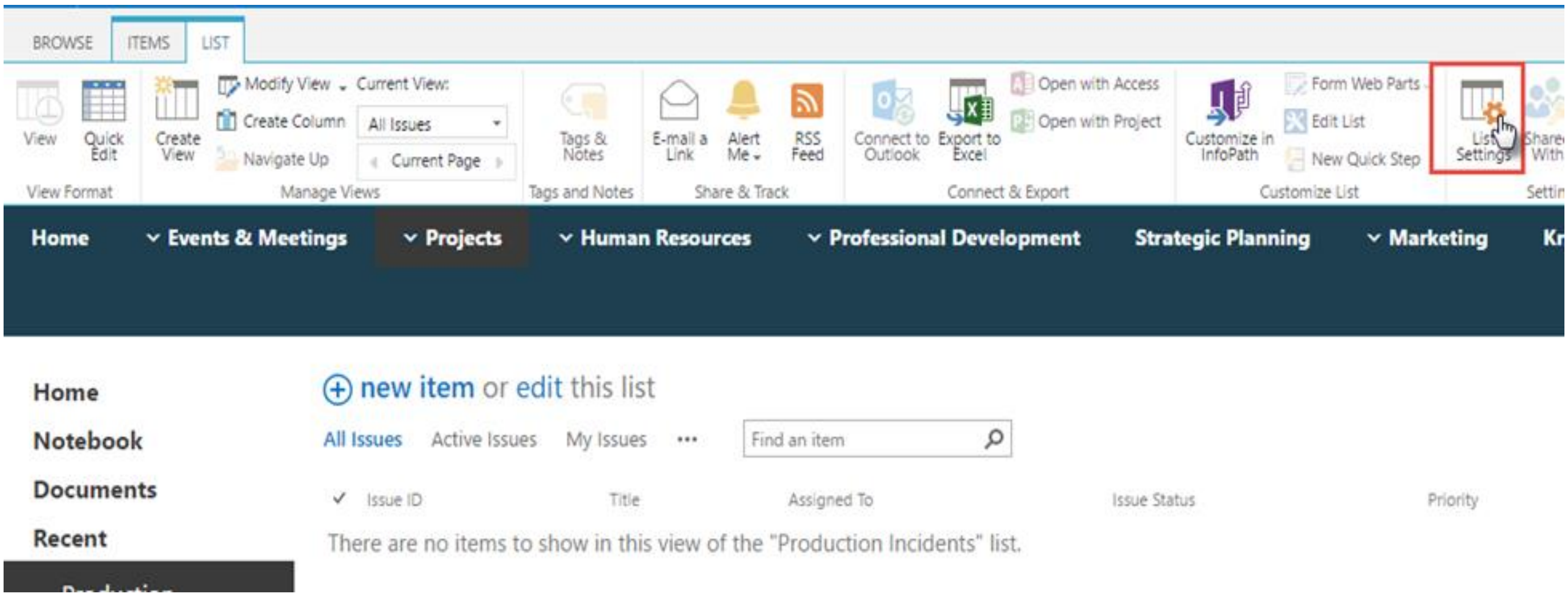
Modifying SharePoint Columns: Step 1

Step 1: Within the **LIST** tab, click on **List Settings**.



Modifying SharePoint Columns: Step 2

Step 2: Scroll down to view the preconfigured columns, and determine which ones, if any, you wish to change or delete. For example, let's say you'd like to change the name of the **Issue Status** column to simply "Status." Click on the column name to edit it.

Columns

A column stores information about each item in the list. Because this list allows multiple content types, some column settings, such as whether information is required or optional for a column, are now specified by the content type of the item. The following columns are currently available in this list:

Column (click to edit)	Type	Used in
Assigned To	Person or Group	Issue
Category	Choice	Issue
Comments	Multiple lines of text	Issue
Created	Date and Time	
Description	Multiple lines of text	Issue
Due Date	Date and Time	Issue
Issue Status	Choice	Issue
Modified	Date and Time	
Priority	Choice	Issue
Related Issues	Lookup	Issue
Title	Single line of text	Issue
Created By	Person or Group	
Modified By	Person or Group	

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Modifying SharePoint Columns: Step 3

Step 3: Note the default settings.

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Modifying SharePoint Columns: Step 4

Step 4: Enter the desired column name. Your column is now updated!