

Health Care Project Management Tip: Effectively Using SharePoint Lists

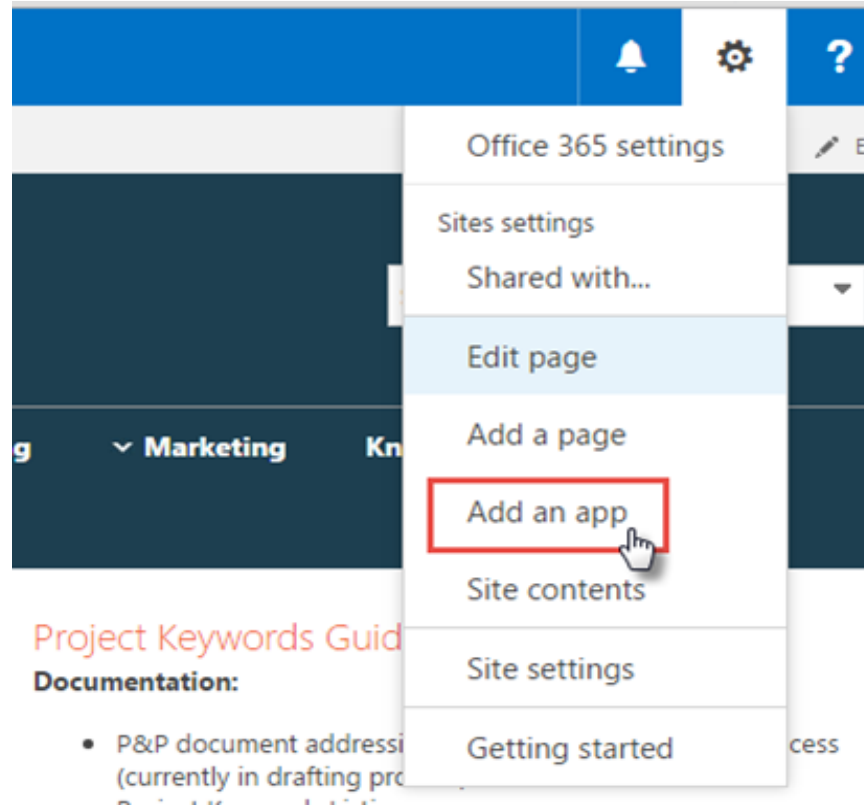
Widely used in health care, SharePoint helps users create not only public-facing Web sites and customizable intranets, but also practical, highly effective project sites that allow team members to stay on top of issues.

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

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



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



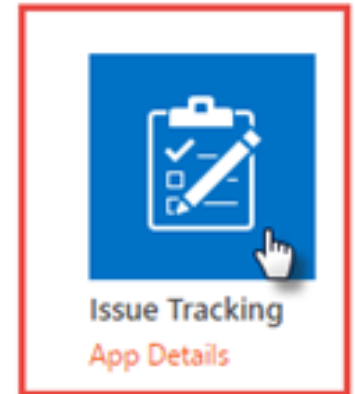
Promoted Links
[App Details](#)



Discussion Board
[App Details](#)

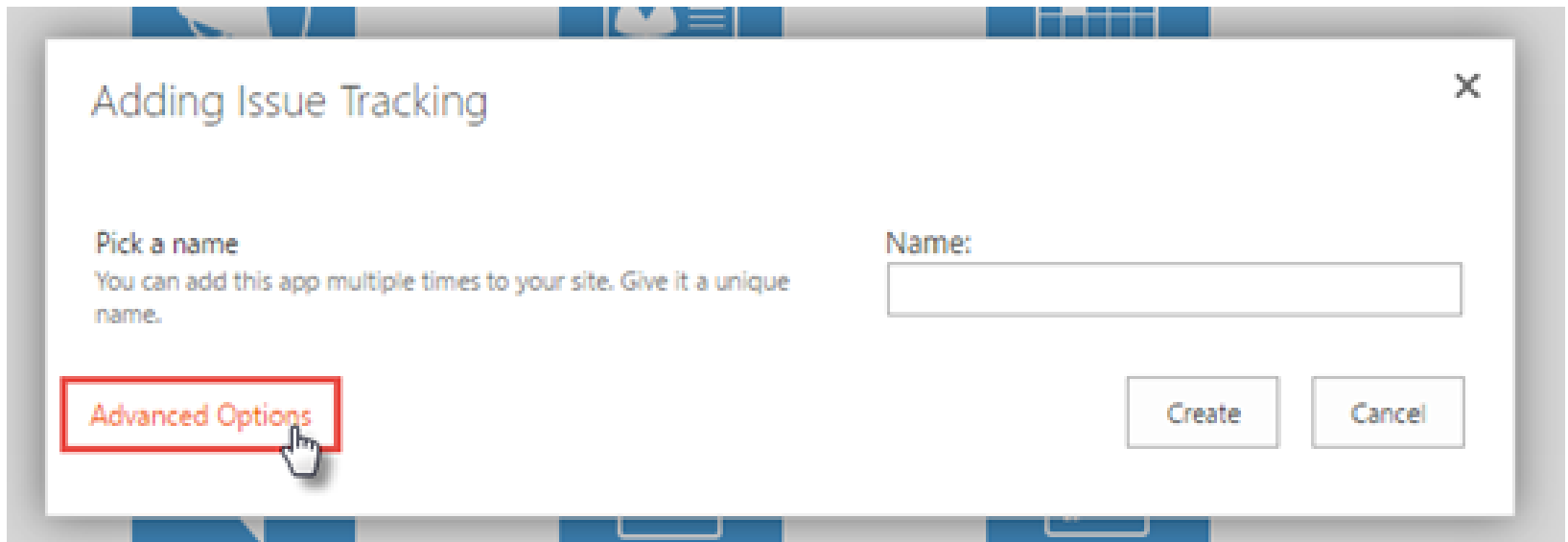


Tasks
[App Details](#)

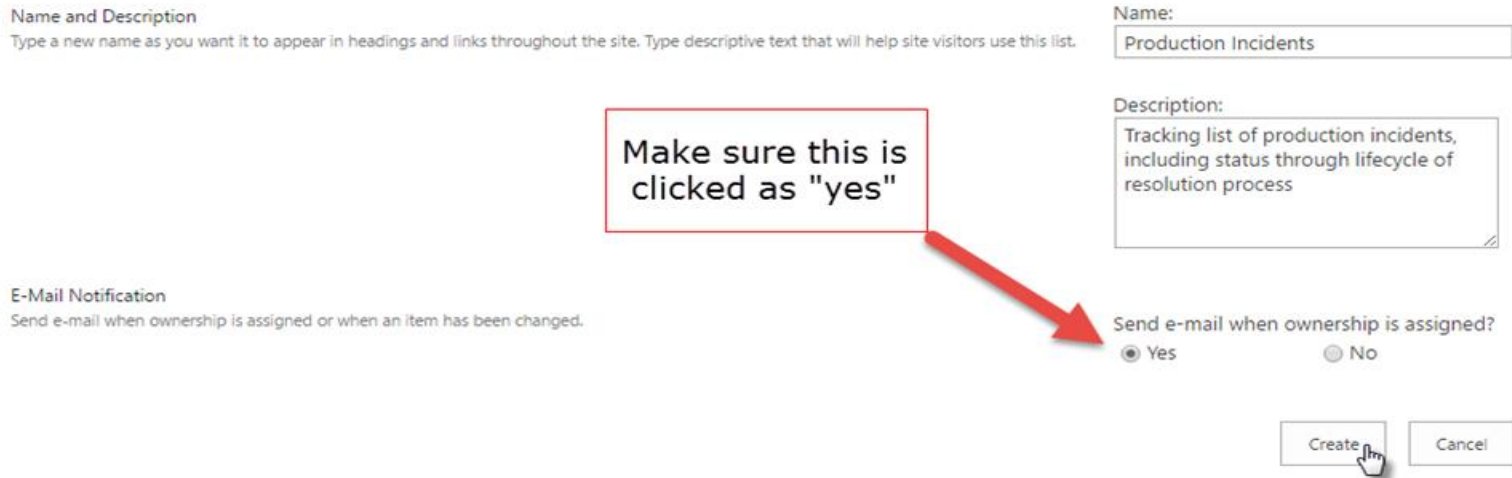


Issue Tracking
[App Details](#)

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



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**.



The screenshot shows the 'Name and Description' section of the SharePoint list creation process. It includes a text box for the name containing 'Production Incidents' and a larger text box for the description containing 'Tracking list of production incidents, including status through lifecycle of resolution process'. Below this is the 'E-Mail Notification' section with the question 'Send e-mail when ownership is assigned?' and radio buttons for 'Yes' (selected) and 'No'. A red box with the text 'Make sure this is clicked as "yes"' has a red arrow pointing to the 'Yes' radio button. At the bottom right, there are 'Create' and 'Cancel' buttons, with a mouse cursor hovering over the 'Create' button.



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.

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.

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

Content Types
 This list is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types are available for this list.

Content Type	Visible on New Button	Default Content Type
Issue	✓	✓

- ▢ Add from existing site content types
- ▢ Change new button order and default content type

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.

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
Modified	Date and Time	
Priority	Choice	Issue
Related Issues	Lookup	Issue
Status	Choice	Issue
Title	Single line of text	Issue
Created By	Person or Group	
Modified By	Person or Group	

- ▢ **Create column**
- ▢ Add from existing site columns
- ▢ Indexed columns

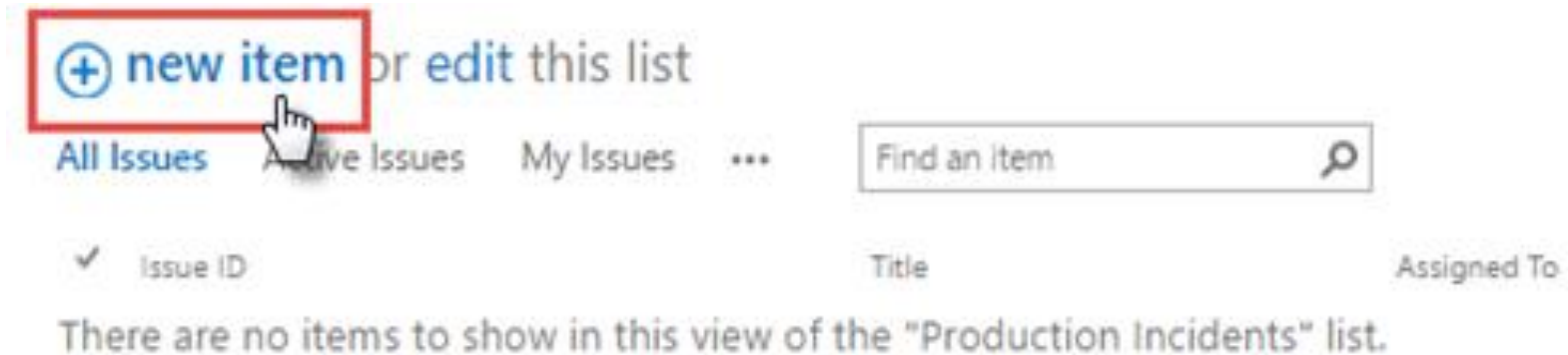
Step 2: SharePoint can accommodate many different types of information. For this example, create a column to capture the name of an **Approver** and by selecting the **Person or Group** radio button. This option links the column to the company directory in SharePoint. Click **OK** to commit your changes.

Column name:

The type of information in this column is:

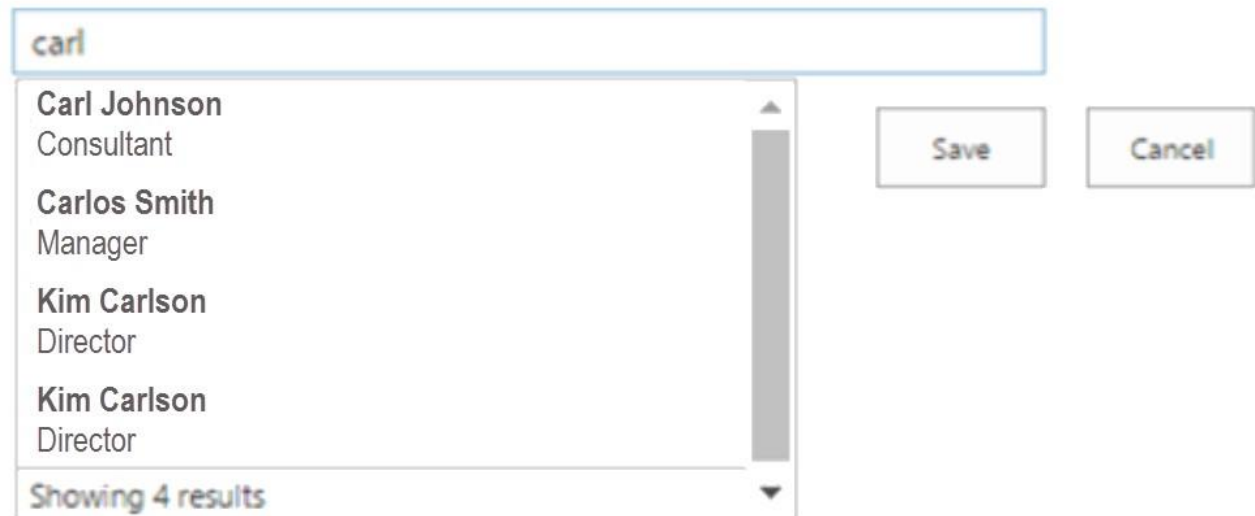
- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Rating Scale (a matrix of choices or a Likert scale)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- External Data
- Task Outcome
- Page Separator (inserts a page break into your survey)
- Full HTML content with formatting and constraints for publishing
- Image with formatting and constraints for publishing
- Hyperlink with formatting and constraints for publishing
- Summary Links data
- Rich media data for publishing
- Managed Metadata

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



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!

Approver



The screenshot shows a form with a text input field containing the text "carl". Below the input field is a dropdown menu with the following entries:

- Carl Johnson
Consultant
- Carlos Smith
Manager
- Kim Carlson
Director
- Kim Carlson
Director

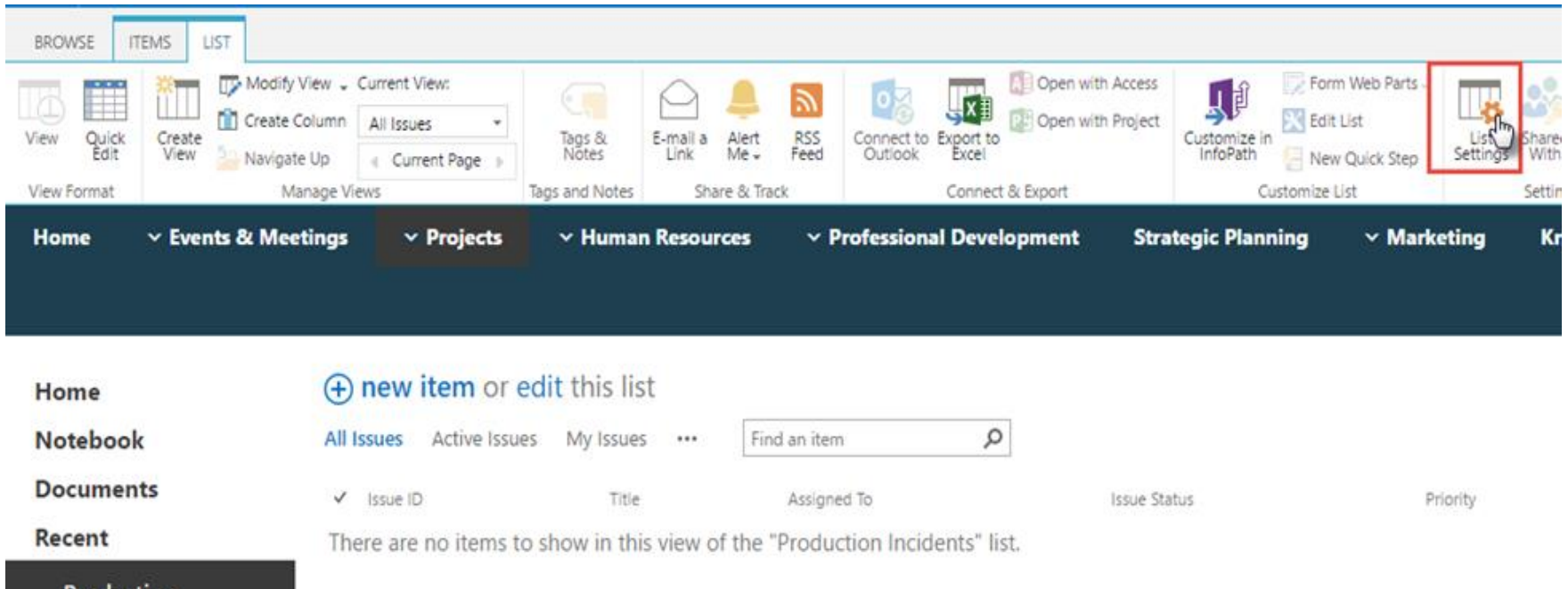
At the bottom of the dropdown menu, it says "Showing 4 results". To the right of the dropdown menu are two buttons: "Save" and "Cancel".



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.

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



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	

Step 3: Note the default settings.

Name and Type
Type a name for this column.

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time

Additional Column Settings
Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
 Yes No

Enforce unique values:
 Yes No

Type each choice on a separate line:

Active
Resolved
Closed

Display choices using:

- Drop-Down Menu
- Radio Buttons
- Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:
 Yes No

Default value:
 Choice Calculated Value

Active

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

Name and Type
Type a name for this column.

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time

Additional Column Settings
Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
 Yes No

Enforce unique values:
 Yes No

Type each choice on a separate line:

Display choices using:

- Drop-Down Menu
- Radio Buttons
- Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:
 Yes No

Default value:
 Choice Calculated Value

Column Validation