

Excel to SharePoint List

I. [SharePoint Basics](#)

(in <http://www.library.yale.edu/wsg/quicklinks/coursedoc.html>)

II. [New Staff Front Door](#)

(<https://collaborate.library.yale.edu/Pages/Default.aspx>)

- SharePoint Shortcut > Open to SharePoint Information and Instructions
- Tip of the Month (TOM) > View All Posts => a good info source
- Top right “Sign in” > Library at upper left corner > Select your sites
- You will see those sites that you have permission only.

III. Go to My Site, you are administrator, can see Site Actions

- Site Settings > Look and Feel > Title, description, and icon > Copy URL for icon
- Site Settings > Look and Feel > Quick Launch > Change Order
- My Profile > Detail > Choose Picture

IV. My Site for practice : Lists > Create > Custom Lists

- Import Spreadsheet => Excel Fields > List Columns
- Custom List :
 - a. Name : Keep it short. See : [Keep Document URLs Short](#) (also in [TOM](#))
 - b. Description: Meaningful Title
 - c. Quick Launch > Default “Yes”
- Settings > List Settings (**Permission, columns, Views, Policy**)
- Settings > Create Column
- New > Add Items
- Settings > Create View

V. My Site List Sample : Count Total

- Import Spreadsheet counTotal.xls => Excel Fields > List Columns
- Create View: By Month > Columns (Select and Order) > Sort (Month and Title) > Group By (Month and Title) > Totals (Amount - Sum, Title – Count, Volume (Sum))

VI. Sample List: Order (Order Statistics)

> Create > Custom List

> Settings > List Settings >

- * List Information

- * General Settings > Change Title, other settings

- * Permissions and Management

- * Columns > Create Columns, Column Order

> Create Column > Column Name: Column Type

- a.** Month: Number; Default to Current Month (Change each month)

- b.** Default => Date: Date and Time

- c.** Default => Title => Rename to Invoice #

- d.** Vendor

- e.** Order Method: Choice (Drop-Down Menu) F= Firm Order, B=Blanket, G=Gift, EX=Exchange

- f.** Material Type: Choice (Radio Buttons) M=Monograph, S=Serial

- g.** Format: Choice (Checkboxes) P=Print, CDR, MF=Microfilm, AU=Audio, DVD=Video, M=Map...

- h.** Titles: Number

> Add Items

> List Settings > Create View > Standard View >

- View Name (Group By Month)

- > check and position to display desire columns

- Sort

- Group By > Month

- Totals: Title Count