

Lab 3-4  
Edit and Create Views of a Contact List

### Lab 3-4: Edit and Create Views of a Contact List

#### Prerequisites

- You are logged on with the student account provided by the instructor.
- You have created the Company Contacts list on your Windows SharePoint Services site.
- You have created Contact items with column values specified in Lab 2-2 for the Last Name, First Name, Company and Business Phone columns and the attachment for the Acres Contact item.
- The Internet Explorer is open to the home page of your Windows SharePoint Services site.

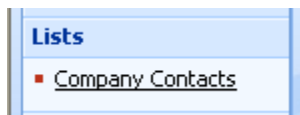
#### Goals

- Modify the All Contacts view on the Company Contacts list to include the City and State/Province columns.
- Create a new Standard View of the Company Contacts list that is filtered and sorted.
- Change the order of the columns in the Company Contacts list.

#### Procedure

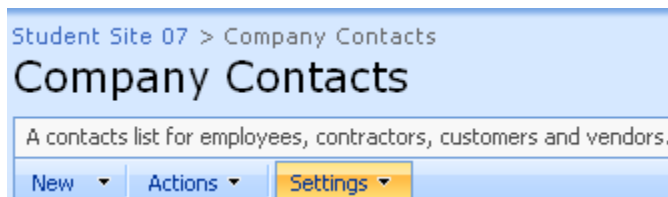
Goal 1: Modify the All Contacts view on the Company Contacts list to include the City and State/Province columns.

1. On the home page of your Windows SharePoint Services site, in the Lists section of the Quick Launch **click the Company Contacts link.**



*Clicking the Company Contacts link in the Lists section of the Quick Launch on the home page of your Windows SharePoint Services site navigates to the Company Contacts page which provides a view of the Contact items and folders at the top level of the Company Contacts list.*

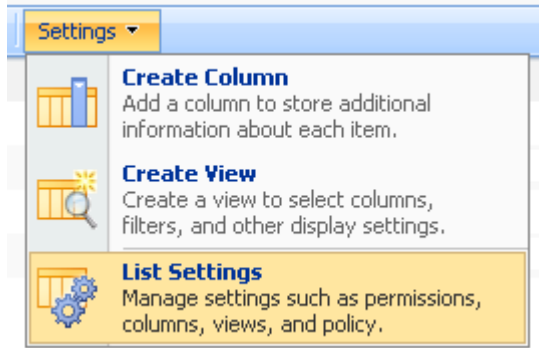
2. On the Company Contacts page, **click the Settings Open Menu control.**



*Clicking the Settings Open Menu control on the Company Contacts page opens the Settings menu.*

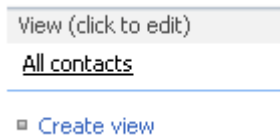
3. In the Settings menu, **click the List Settings menu item.**

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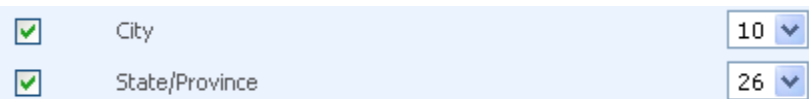
Clicking the List Settings menu item navigates to the Customize Company Contacts page.

4. On the Customize Company Contacts page in the View section, **click the All Contacts link.**



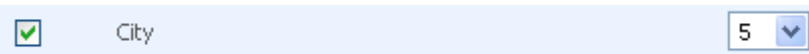
Clicking the All Contacts link in the Views section of the Customize Company Contacts page navigates to the Edit View: Company Contacts page.

5. On the Edit View: Company Contacts page in the Columns section, **check the City checkbox and the State/Province checkbox.**



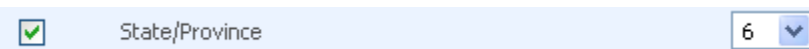
Checking the City checkbox and the State/Province checkboxes specifies that the City and State/Province columns will be included in the All Contacts view.

6. On the Edit View: Company Contacts page in the Columns section, **select the value 5 in the dropdown control** in the Position from Left column to the right of the City checkbox.



Selecting the value 5 in the dropdown control in the Position from Left column to the right of the City checkbox specifies that the City column will be displayed between the Company column and the Business Phone column in the All Contacts view.

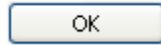
7. On the Edit View: Company Contacts page in the Columns section, **select the value 6 in the dropdown control** in the Position from Left column to the right of the State/Province checkbox.



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Selecting the value 6 in the dropdown control in the Position from Left column to the right of the State/Province checkbox specifies that the State/Province column will be displayed between the City column and the Business Phone column in the All Contacts view.

8. On the Edit View: Company Contacts page, **click the OK button.**



Clicking the OK button on the Edit View: Company Contacts page saves the changes to the All Contacts view and navigates to the Company Contacts page which provides a view of the Contact items and folders at the top level of the Company Contacts list. Notice on the Company Contacts page that the City and State/Province columns are displayed between the Company and Business Phone columns in the All Contacts view on the Company Contacts page.

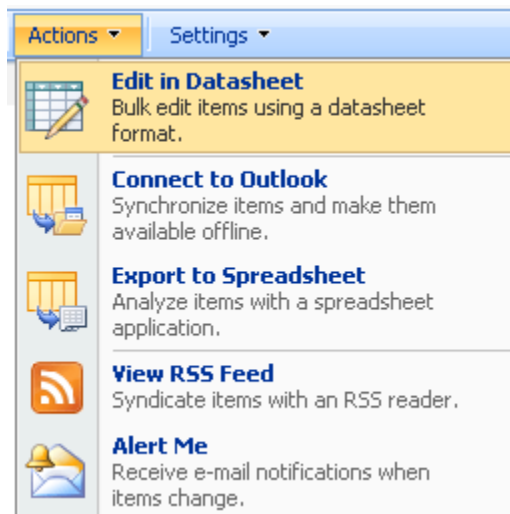
Type	Last Name	First Name	Company	City	State/Province
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9. On the Company Contacts page, **click the Actions Open Menu control.**



Clicking the Actions Open Menu control opens the Actions menu.

10. In the Actions menu, **click the Edit in Datasheet menu item.**



Clicking the Edit in Datasheet menu item navigates to another Company Contacts page that contains an Access Web Datasheet which provides a spreadsheet-like form for viewing and editing Contact items and folders in the top level of the Company Contacts list. Notice that

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*the City and State/Province columns are also displayed in the Access Web Datasheet on the Company Contacts page.*

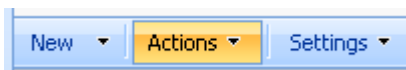
11. On the Company Contacts page in the Access Web Datasheet, **type the following City and State/Province values** for each Contact item.
- a. For the Frawley Contact item, **type *Clinton in the City column and TN in the State Column.***
  - b. For the Reynolds Contact item, **type *Chattanooga in the City column and TN in the State Column.***
  - c. For the Roberts Contact item, **type *Harlan in the City column and KY in the State Column.***
  - d. For the Watson Contact item, **type *Wytheville in the City column and VA in the State Column.***

Frawley	Jeff	Smith and Jones Food Services	Clinton	TN
Reynolds	Lloyd	Brighton Real Estate	Chattanooga	TN
Roberts	Allison	Three Phase Logistics International	Harlan	KY
Watson	Sarah	Goodwin, Link and Kesterson Insurance	Wytheville	VA

12. On the Company Contacts page in the Access Web Datasheet, **click any cell in the Access Web Datasheet** other than the State/Province cell for the Watson Contact item.

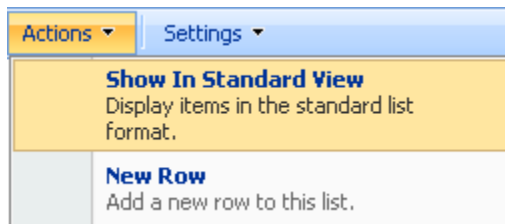
*Clicking a different cell in the Access Web Datasheet from where the last column value was entered saves the Contact item on which the column value was entered.*

13. On the Company Contacts page, **click the Actions Open Menu control.**



*Clicking the Actions Open Menu control on the Company Contacts page opens the Actions menu.*

14. In the Actions menu, **click the Show In Standard View menu item.**

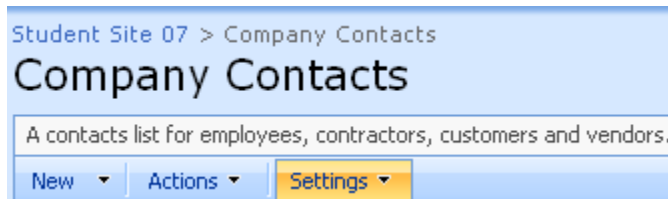


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*Clicking the Show In Standard View menu item navigates to the Company Contacts page which provides a view of the Contact items and folders at the top level of the Company Contacts list. Notice that the City and State/Province values that you entered in the Access Web Datasheet are displayed on the Company Contacts page.*

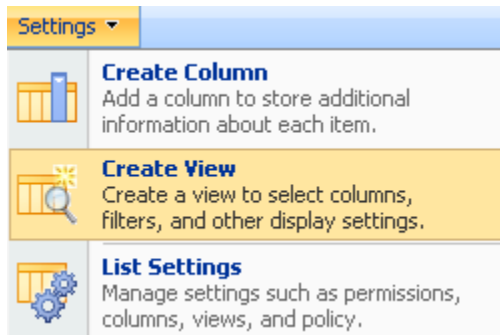
Goal 2: Create a new Standard View of the Company Contacts list that is filtered and sorted.

15. On the Company Contacts page, **click the Settings Open Menu control.**



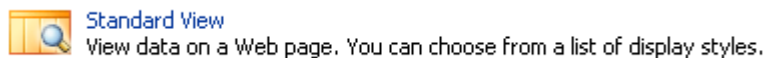
*Clicking the Settings Open Menu control opens the Settings menu.*

16. In the Settings menu, **click the Create View menu item.**



*Clicking the Create View menu item in the Settings menu navigates to the Create View: Company Contacts page.*

17. On the Create View: Company Contacts page in the Choose a view format section, **click the Standard View link.**



*Clicking the Standard View link in the Choose a view format section of the Create View: Company Contacts page navigates to another Create View: Company Contacts page in which you can create a new view.*

18. On the Create View: Company Contacts page in the Name section, **type Tennessee Contacts in the View Name field.**

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View Name:

*Typing Tennessee Contacts in the View Name field in the Name section on the Create View: Company Contacts page gives the new view the name Tennessee Contacts.*

19. On the Create View: Company Contacts page in the Columns section, **clear all of the checkboxes except the State/Province checkbox, the City checkbox, the Last Name checkbox, the First Name checkbox and the Company checkbox.** The 5 checkboxes named in this step remain checked.

Display	Column Name	Position from Left
<input type="checkbox"/>	Type (icon linked to document)	1
<input checked="" type="checkbox"/>	Last Name (linked to item with edit menu)	2
<input checked="" type="checkbox"/>	First Name	3
<input checked="" type="checkbox"/>	Company	4
<input checked="" type="checkbox"/>	City	5
<input checked="" type="checkbox"/>	State/Province	6
<input type="checkbox"/>	Business Phone	7
<input type="checkbox"/>	Home Phone	8
<input type="checkbox"/>	E-mail Address	9
<input type="checkbox"/>	Attachments	10

*Clearing these checkboxes specifies that only the Last Name, First Name, Company, City and State/Province columns will be displayed in the Tennessee Contacts view.*

20. On the Create View: Company Contacts page in the Columns section, **set the Position from Left dropdown values** for the columns as follows.
- Set the Position from Left value for the **State/Province column to 1.**
  - Set the Position from Left value for the **City column to 2.**
  - Set the Position from Left value for the **Last Name column to 3.**
  - Set the Position from Left value for the **First Name column to 4.**
  - Set the Position from Left value for the **Company column to 5.**

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Display	Column Name	Position from Left
<input type="checkbox"/>	Type (icon linked to document)	6
<input checked="" type="checkbox"/>	Last Name (linked to item with edit menu)	3
<input checked="" type="checkbox"/>	First Name	4
<input checked="" type="checkbox"/>	Company	5
<input checked="" type="checkbox"/>	City	2
<input checked="" type="checkbox"/>	State/Province	1

21. On the Create View: Company Contacts page in the Sort section, **in the First sort by the column dropdown select the City value.**

First sort by the column:

City

*Selecting the City value in the First sort by the column dropdown in the Sort section on the Create View: Company Contacts page specifies that the Tennessee Contacts view will be sorted first by the City column.*

22. On the Create View: Company Contacts page in the Sort section, **in the Then sort by the column dropdown select the Last Name value.**

Then sort by the column:

Last Name

*Selecting the Last Name value in the Then sort by the column dropdown in the Sort section on the Create View: Company Contacts page specifies that the Tennessee Contacts view will be sorted secondarily by the Last Name column.*

23. On the Create View: Company Contacts page in the Filter section, **select the State/Province value** in the Show the items when column dropdown and **type TN in the field** just above the And and Or radio buttons.

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Show all items in this view

Show items only when the following is true:

Show the items when column

State/Province

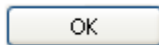
is equal to

TN

And  Or

Selecting the State/Province value in the Show the items when column dropdown and typing TN in the field just above the And and Or radio buttons in the Filter section of the Create View: Company Contacts page specifies that Tennessee Contacts view will only contain Contact items in the Company Contacts list whose State/Province value is TN.

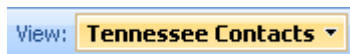
24. On the Create View: Company Contacts page **click the OK button.**



Clicking the OK button on the Create View: Company Contacts page saves the Tennessee Contacts view definition and navigates to the Company Contacts page which provides a view of the Contact items and folders at the top level of the Company Contacts list. The view displayed on the Company Contacts page is the Tennessee Contacts view that you just created. Notice that only the Contact items whose State/Province value is TN are displayed in the Tennessee Contact view and that the Reynolds Contact item whose City is Chattanooga is displayed before the Frawley Contact item whose City is Clinton. Chattanooga falls before Clinton on alphabetical order. Also notice that only the State/Province, City, Last Name, First Name and Company columns are displayed and they are displayed in the order that you specified in the Position from Left dropdown boxes on the Create View: Company Contacts page.

State/Province	City	Last Name	First Name	Company
TN	Chattanooga	Reynolds <small>NEW</small>	Lloyd	Brighton Real Estate
TN	Clinton	Frawley <small>NEW</small>	Jeff	Smith and Jones Food Services

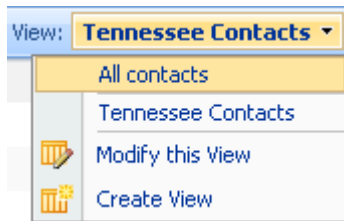
25. On the Company Contacts page, **click the Tennessee Contacts Open Menu control.**



Clicking the Tennessee Contacts Open Menu control on the Company Contacts page opens the Tennessee Contacts menu.

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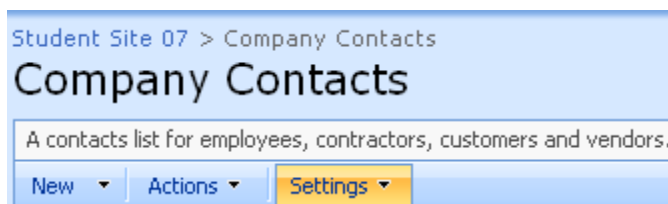
26. In the Tennessee Contacts menu, **click the All Contacts menu item.**



*Clicking the All Contacts menu item in the Tennessee Contacts menu navigates to another Company Contacts page which provides a view of the Contact items and folders at the top level of the Company Contacts list. This is the All Contacts view which is not filtered but is sorted by the Last Name and First Name columns.*

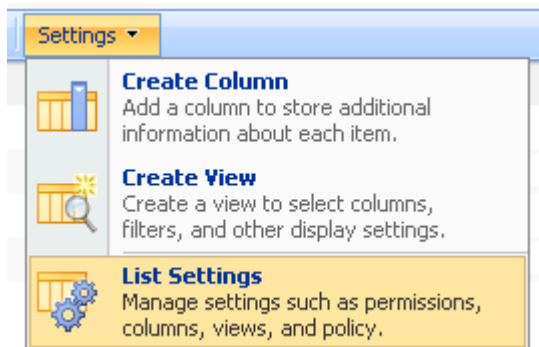
Goal 3: Change the order of the columns in the Company Contacts list.

27. On the Company Contacts page, **click the Settings Open Menu control.**



*Clicking the Settings Open Menu control on the Company Contacts page opens the Settings menu.*

28. In the Settings menu, **click the List Settings menu option.**



*Clicking the List Settings menu option in the Settings menu navigates to the Customize Company Contacts page.*

29. On the Customize Company Contacts page in the Columns section, **click the Column ordering link.**

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- [Create column](#)
- [Add from existing site columns](#)
- [Column ordering](#)
- [Indexed columns](#)

Clicking the [Column ordering](#) link in the Columns section of the [Customize Company Contacts](#) page navigates to the.

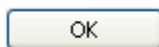
Field Name	Position from Top
Last Name	1 ▼
First Name	2 ▼
Full Name	3 ▼

30. On the [Change Field Order: Company Contacts](#) page in the Field Order section, **change the Position from Top value in the dropdown for the Last Name column to 2.**

Field Name	Position from Top
First Name	1 ▼
Last Name	2 ▼
Full Name	3 ▼

Notice that the [First Name](#) value was automatically updated to 1.

31. On the [Change Field Order: Company Contacts](#) page, **click the OK button.**



Clicking the [OK](#) button on the [Change Field Order: Company Contacts](#) page saves the changed order of columns in the [Company Contacts](#) list and navigates to the [Customize Company Contacts](#) page.

32. On the [Customize Company Contacts](#) page, **click the Company Contacts link in the content breadcrumb navigation.**



Clicking the [Company Contacts](#) link in the content breadcrumb navigation on the [Customize Company Contacts](#) page navigates to the [Company Contacts](#) page which provides a view of the Contact items and folders at the top level of the [Company Contacts](#) list. Notice that although you changed the column order in the [Company Contacts](#) list so that the [First Name](#)

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*column comes before the Last Name column, the Company Contacts page continues to display the Last Name column before the First Name column. The reason for this is that the order of columns displayed in a view is controlled by the view definition, not the order in which columns are defined in a list.*

33. On the Company Contacts page, **click the Acres page.**



*Clicking the Acres link on the Company Contacts page navigates to the Company Contacts: Acres page. Notice that the First Name is displayed before the Last Name. The order in which columns are defined in a list determines the order in which they are displayed in the form with which you view a list item and the form with which you edit a list item.*

<b>First Name</b>	Tim
<b>Last Name</b>	Acres
<b>Full Name</b>	
<b>E-mail Address</b>	<a href="mailto:tim@smokymountaintours.com">tim@smokymountaintours.com</a>

34. On the Company Contacts: Acres page, **click the Home tab in the top link bar.**



*Clicking the Home tab in the top link bar navigates to the home page of your Windows SharePoint Services site.*

Remain on this page in preparation for the next lab.