Microsoft Lists Essentials

Enhancing Productivity Through Microsoft 365's Smart Information Tracking App

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Naveed Ahmed
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To my parents.

To Syed Rafeeudin, who would have been the greatest proponent of this book.

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About the Author

Naveed Ahmed is based in Toronto, Canada. He is a distinguished user experience designer with a career of over a decade, working at the intersection of technology and human-centric design. During his tenure with industry leaders, such as Microsoft, Adobe, and Red Hat, Naveed has made significant contributions to the design excellence of products that have reached millions of users worldwide. Between 2018 and 2023, Naveed played a critical role within the OneDrive & SharePoint team at Microsoft. As a Senior Design Manager, he was pivotal in shaping the user experience of Microsoft Lists. His efforts were key to launching the Lists mobile apps and in modernizing the product and enhancing the user experience across numerous web features.

About the Technical Reviewer

Ben Truelove is a principal designer working on Copilot and search experiences in OneDrive. Before that, he worked on Microsoft Lists and a wide variety of projects from Windows to AutoPC in his 27-year career. He is also an Accessibility Champion and educator in Microsoft-wide initiatives which include the invention of accessibility specs and other tools for designers.

Acknowledgments

Writing my first book is a significant milestone in my life, and I have nothing but immense gratitude for reaching this moment. And many individuals to be thankful to.

Firstly, the Almighty.

Hani, for her unwavering support and the nonstop pep talks throughout the many months while I was working on the manuscript.

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Writing is no easy task. Throughout the process of writing this book, there were several moments when I nearly gave up: thanks to my self-doubt and the Canadian winters. But the encouragement I received from those around me kept me going.

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Special thanks go to my friend and colleague, Ben Truelove. As the technical reviewer, his expertise significantly enhanced the quality of the book. I am grateful to the entire Apress team as well for their belief in this project and their guidance in bringing it to life.

Lastly, I wish to acknowledge the Leadership at Microsoft, who inspire me every day and whose spirit of growth mindset gave me the courage to dream about writing a book.

Introduction

In the past few years, I had the opportunity to shape the UX of Microsoft Lists as a Senior Design Manager on the product. The more I used Lists and spoke to users, the more I discovered its potential and role in enhancing productivity for both individuals and teams.

A lot of my learning was through internal solutions I built using Lists, to address scenarios that directly impacted my team. These solutions made our business processes a lot more efficient and helped us achieve our OKRs in a more streamlined manner. In some cases, these solutions reduced manual work that took several days every week to just half day of work.

During this process, I also discovered that many Microsoft 365 users, even those with considerable experience, were yet to understand the benefits that Lists offers for simplified management and tracking of information. This inspired me to write this book on Lists, with an aim to help users unlock its full potential and shape how the product is used.

Lists, as we will see in the book, is much more than its deceptively simple name. Whether you are an experienced user or new to the product, this book is designed to guide everyone, from individuals to teams, in managing various types of information— from personal tasks to complex business data.

The book provides a thorough introduction to all the features of Lists, simplifying complex functionalities into understandable concepts. It is written to cater to a diverse audience, whether you are a student organizing a book club, a homeowner managing renovation, or a director overseeing a multi-million-dollar project. We begin with the fundamentals and progressively cover more advanced topics, which ensures a smooth learning curve for both beginners and advanced users.

The initial chapters introduce the basics of lists and how you can get started easily. We then look at the core areas like the column types available; ways to view your lists, such as calendars, galleries, or boards; features that make collaboration easy; and customization using JSON for those who want to take it a notch up.

In the latter part, you will be introduced to the Microsoft Lists mobile apps, which support on-the-go scenarios with mobile-specific features. We conclude with advanced functionalities such as mathematical calculations, Lists Forms, and integration with Power Apps.

This book is a compilation of my firsthand experiences of using this powerful tool. By the end of this book, you will have a solid understanding of Microsoft Lists, its features, and practical applications to improve your productivity.

I have thoroughly enjoyed writing this book, and I hope it serves as a valuable resource in your journey with Microsoft Lists.

Happy learning!

Disclaimer: The contents of this book represent my own personal views and experiences. I am writing in my personal capacity and not on behalf of my employer, Microsoft Corporation. The information provided in this book is based on my understanding and does not reflect the official policy or position of Microsoft Corporation.

Introduction to Microsoft Lists

Lists are crucial tools for productivity. They help us sort out messes and focus on what matters, whether we are working alone or in a team. Some like writing lists on sticky notes, while others use digital tools. With new tech, we can even speak to add tasks. From simple notes to tools that blend tasks, we adapt lists to fit our needs, making work smoother and more organized for everyone involved.

As digital collaboration and remote work become more widespread, there's a pressing need for tools that aid in collaboration. Many companies, both large and small, are innovating in this space, with the aim to enhance team efficiency and streamline processes. For managing and tracking information as part of an organization or for individual productivity, many have turned to Microsoft Lists, a versatile tool for information management by Microsoft.

But when you hear the word "list," you might think of a simple grocery or a to-do list; Microsoft Lists goes far beyond just being a simple list.

1.1 Welcome to Microsoft Lists

Microsoft Lists, an integral part of the Microsoft 365 ecosystem, is designed to manage information and tasks. In the words of Microsoft, it's "an app that helps you track information and organize your work." With Lists, businesses and individuals can transform the way they handle information.

Whether you're making a basic to-do list or managing a complex inventory system, Lists provides a user-friendly platform that's intuitive for both beginners and experienced users. On the surface, it may seem like a straightforward list, but as you dig deeper, you will discover a robust, secure tool for information management that is readily available in the Microsoft 365 suite.

With Microsoft Lists, you can effortlessly craft a list to match your needs. Want to note down tasks for an upcoming project? Do it. Need to assign dates to them or delegate the tasks? It's a breeze. From sending reminders and attaching files to visualizing your list in multiple ways, Lists is versatile. Thanks to its structured columns and content validation, your information remains organized and error-free. And for those personal projects, like a dad keeping track of soccer training sessions, Microsoft Lists has got you covered too. Figure 1-1 is an example of an inventory management list, seen across web and the mobile app.
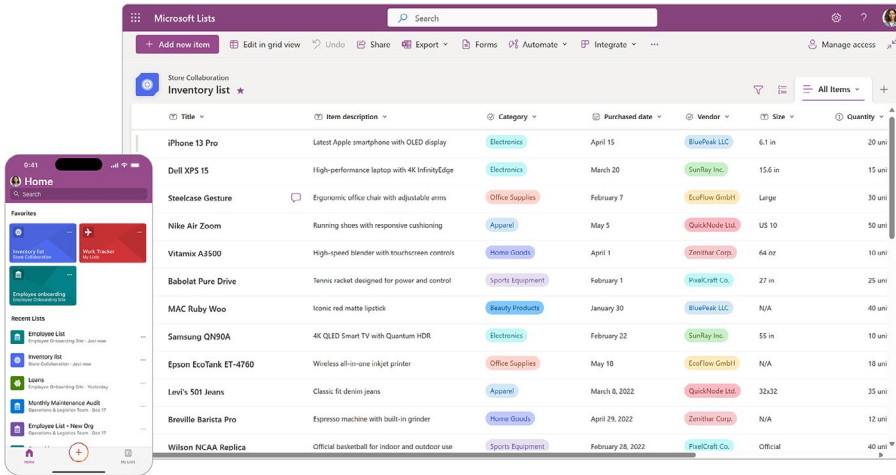
Figure 1-1. *Microsoft Lists on web and mobile*

Microsoft Lists is built for a broad spectrum of users, from beginners to professionals, catering to diverse enterprise and consumer use cases. Advanced users can explore features such as JSON-based[1] low-code capabilities and integrations with the Power Platform, or use graph APIs to create custom solutions to push the product further.

In recent years, Microsoft Lists has seen substantial advancements in technology and user experience. Originally designed for enterprise users, Lists has expanded its reach to the consumer segment, enhancing productivity and collaboration. Those with an

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[1] JSON – JavaScript Object Notation

MSA account[2] can now access Microsoft Lists for free. The newly introduced Lists apps for iOS and Android offer exclusive mobile-centric features, enabling users to maximize productivity on their phones and tablets.

Being part of the M365 suite, Lists provides top-tier security and privacy, which both enterprise and consumer users benefit from. List owners have full control over permissions; they can limit access to just reading the list or even restrict access to specific list items. Enterprise users can use predefined or custom user groups in their organization to set the right permissions as well. This intricate control ensures that information is securely accessed and only shared with the intended people.

You may start using the product as a novice user, but you will realize that as you keep using and building the product and configuring it for your scenarios, the product becomes powerful and an indispensable part of your work. For those accustomed to the Microsoft world, embracing Microsoft Lists will feel natural.

1.2 Significance of Lists in Modern Productivity

Lists help us manage chaos and bring order to our tasks. With a list, we can focus on what's important, decide what comes first, and feel good as we tick things off. Lists not only keep our personal tasks in line but also help teams work together effectively, making sure everyone knows their part and nothing gets missed.

People have their own ways of making lists. Some love the feel of pen and paper, while others prefer digital methods. There are online tools that combine lists with other tasks, making everything flow together. And for those who like a starting point, many digital tools offer templates, making list-making quicker and tailored to different needs.

Evolution of Information Management

As we transition from the basic act of list-making to more advanced methods of managing information, it's clear that technology has played a major role in revolutionizing the concept of a list. Historically, information management was a domain reserved for those with specific expertise. But with the advent of user-friendly

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[2] Microsoft account (MSA), formerly known as Microsoft Passport, .NET Passport, and Windows Live ID, is Microsoft's integrated login system for consumers, enabling access to its services such as Outlook.com, OneDrive, Office; platforms such as Windows and Xbox; and apps such as Visual Studio

software, the power to manage, sort, and interpret data became accessible to many. This democratization of information management has set the stage for tools that balance sophistication with simplicity, meeting the increasing demands of both individual consumers and enterprises.

Early systems for information management required specialized knowledge, but over time, tools like dBase, FoxPro, Access, and Excel democratized data management. Microsoft Excel, in particular, became the go-to for many data tasks. However, as data complexities grew, the need for more robust tools became apparent.

Understanding that both individual consumers and enterprise users have varied needs, Microsoft unveiled Lists. This smart tool is designed to handle everything from simple information tracking to complex data tasks. With its ability to be customized, Microsoft Lists boosts productivity by letting users shape it to their needs. For some, it could be a straightforward to-do list, reminiscent of Microsoft's "To Do" for daily tasks. For others, it could be a detailed project planner that enhances team collaboration.

Specialized tools certainly have their niche, but Lists stands out due to its flexibility. It seamlessly handles personal task management and comprehensive team collaboration, catering to both consumers and enterprises.

1.3 Brief History

From its inception in the early 2000s, Lists has been an integral part of Microsoft SharePoint, shaping the platform's core functionality and its journey through the digital evolution. Lists, a fundamental part of SharePoint's framework, has always offered structured, tabular data storage, allowing users to adeptly manage diverse information—from tasks and announcements to custom datasets. As we explore the history of Lists, it's clear that even as SharePoint evolved and changed, the core role of Lists stayed consistent.

With the release of SharePoint 2013, Microsoft introduced various enhancements to Lists, offering a better user experience, improved views, and efficient management of large lists. This commitment to improvement continued into 2016 with SharePoint Online and SharePoint 2016, where the company unveiled "modern" Lists. This modern approach provided a sleeker, more responsive design, ensuring quicker interactions and deeper integration with the broader Office 365 ecosystem.

In a significant move in 2020, Microsoft announced Microsoft Lists as a stand-alone product in the Microsoft 365 family. An evolution of SharePoint Lists, it enabled users to leverage list capabilities without necessarily diving deep into SharePoint. The stand-alone app had a modern UX and came with intuitive templates and several new features to make list adoption easier. Furthermore, in contrast to previous versions where lists on SharePoint were shared only among site users, Microsoft Lists now allowed individuals to create personal lists for their own private use. Figure 1-2 shows the logo of the new Microsoft Lists product offering.

Figure 1-2. *Logo of Microsoft Lists, introduced in the 2020 product update (source: Wikimedia)*

Lists could now be accessed via its dedicated web app, integrated within Teams, or through the mobile app. An important note here is that SharePoint Lists, Lists app, and those embedded in Teams are essentially the same product; the distinction lies in the mode of access. Lists remain tethered to a SharePoint site unless they are personal lists. The Microsoft Lists "Home," accessible through the app launcher on Office.com, simply consolidates your Lists from across the M365 ecosystem, presenting them in one unified location.

While all this introduced several new paradigms, the product stayed true to the core principles of SharePoint and Microsoft's design ethos.

SharePoint has been a cornerstone of enterprise collaboration for decades, and building on this heritage, Microsoft Lists is a product tailored for today's user. The launch of the new avatar of the product since 2020 signified more than just an evolution; it represented Microsoft's renewed vision for information management and team collaboration. Enhanced features coupled with a modern UX positioned Lists as an indispensable tool for team productivity.

As we progress through this book, we will explore all that Lists offers, guiding you to construct comprehensive solutions with minimal product familiarity or limited coding expertise.

1.4 Overview of Features

The journey with Microsoft Lists will begin in a simple manner, but as you explore further, you will discover that you can expand the product significantly. This adaptability allows you to create everything from a basic list to track personal tasks to a complex, collaborative list for larger teams. What truly amplifies the power of Microsoft Lists is its ability to cater to diverse needs while maintaining its core essence. Begin your Lists experience with its basic functionalities, and as you familiarize yourself with the platform, you'll soon realize how easy it is to create products to streamline your workflows.

Here is a quick overview of the product's features. Throughout this book, we will go deep into each of these, illustrating various scenarios, use cases, and examples. Whether you are a newcomer to Microsoft Lists or someone who already has a good grasp of it, this overview aims to highlight key functionalities and the value they bring.

Basic Functionality and Structure

- List templates: Pre-designed templates for common tasks and workflows that make getting started easier. (Refer to Chapter 3.)

  User value: Save time setting up lists by utilizing a template, like a project tracker for a marketing campaign.

- Column types: Different types of columns to customize list data, such as text, date, choice, location, attachments, and several other types of data, as shown in Table 1-1. (Refer to Chapter 4.)

  User value: Easily categorize and define data; an HR team can have columns for employee names, join dates, and roles.

- Personal lists: Create private lists for your personal needs, unlike lists that could earlier be stored only on a SharePoint site. (Refer to Chapter 3.)

  User value: Organize your daily tasks and monitor progress by creating lists that are private to you. For instance, an employee can keep track of their monthly goals or daily tasks.

- Math calculations: Simple math calculations based on list data. (Refer to Chapter 9.)

  User value: Automate calculations like total sales for a month, averages, etc., helping teams to quickly see summaries.

- Rules and reminders: Set up automated notifications based on list triggers. (Refer to Chapter 9.)

  User value: Never miss updates to a list item; get a reminder when the price of an item is updated in the list.

Table 1-1. *List of all columns available in Lists. The ones marked with * can only be created via the Classic interface*

1. Text	10. Location
2. Choice	11. Image
3. Date and time	12. Managed metadata
4. Multiple lines of text	13. Lookup
5. Person (or Group)	14. Average Rating
6. Number	15. Attachments*
7. Yes/No	16. Calculated*
8. Hyperlink	17. Task Outcome*
9. Currency	

Collaboration and Sharing

- Collaboration with commenting: Engage in discussions directly within list items using comments, like other Microsoft 365 products, as shown in Figure 1-3. (Refer to Chapter 7.)

  User value: Streamline feedback loops; product teams can discuss feature requests in real time.

- Saved views (public and private): Customize, reorder, and save list views for personal or shared use. (Refer to Chapter 6.)

  User value: Personalize and save list for future use; sales reps can have private views of their leads while sharing a common view with the team.

- Permissions and security: Grant or restrict access to lists or specific items. (Refer to Chapter 7.)

  User value: Safeguard sensitive information, ensuring only the finance department can access salary details, for instance.
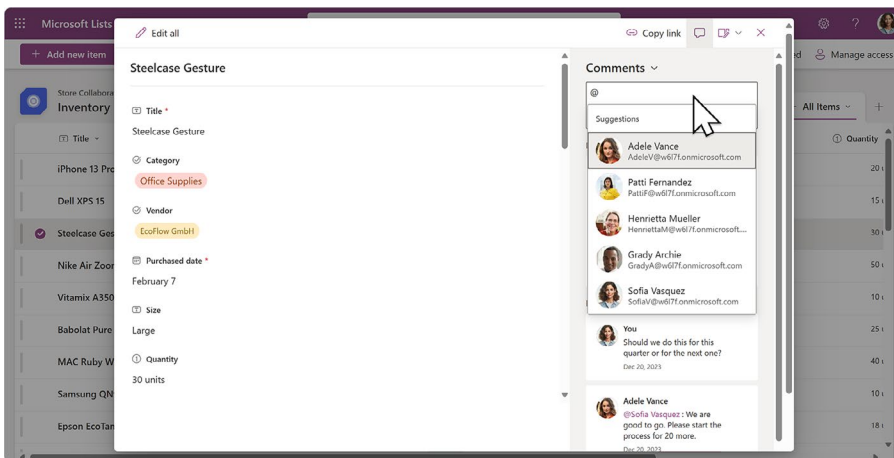

Figure 1-3.   *Commenting feature in Lists*

Customization and Design

- Conditional formatting: Visually distinguish list items based on set conditions using out-of-the-box features or JSON code. (Refer to Chapter 4.)

  User value: Quickly identify priority items; overdue tasks can be highlighted in red.

- Views and layouts: Configure how list data is displayed and how users interact using various out-of-the-box views and layouts. (Refer to Chapter 6.)

  User value: Adapt to diverse scenarios; HR may see the team events list as a list, but the employees can see the same list as a calendar or cards.

- Lists forms: Create forms in lists to collect data, without the need to share the entire list. (Refer to Chapter 9.)

  User value: Populate lists more efficiently; a store can design forms for collecting orders, without giving access to the entire list.

Data Management and Operations

- Importing and exporting lists: Move list data in and out of the platform. (Refer to Chapters 3 and 5.)

  User value: Transition smoothly; teams can import Excel sheets to create new collaborative lists.

- Sorting, filtering, and search: Efficiently manage and locate list information. (Refer to Chapter 5.)

  User value: Find information quickly; support teams can filter tickets by priority.

- Validation: Ensure consistency and correctness of entered data using various low-code validation options. (Refer to Chapter 4.)

  User value: Maintain data quality; list owners can validate information like email IDs and phone numbers against the standard format.

- Versioning: Track changes and revert to previous states of list items. (Refer to Chapter 7.)

  User value: Keep track of changes in the list; teams can review who made changes to a specific list item over time.

Mobile Features

- Mobile and tablet apps: Access lists on the go through dedicated apps, as seen in Figure 1-4, which shows Lists on iPhone and iPad. (Refer to Chapter 8.)

  User value: Stay updated anywhere; a field agent can review client details before a meeting.

- Mobile-specific features (e.g., QR code scans, Camera input, GPS, Multiple accounts): Utilize device capabilities to enhance list functionalities. (Refer to Chapter 8.)

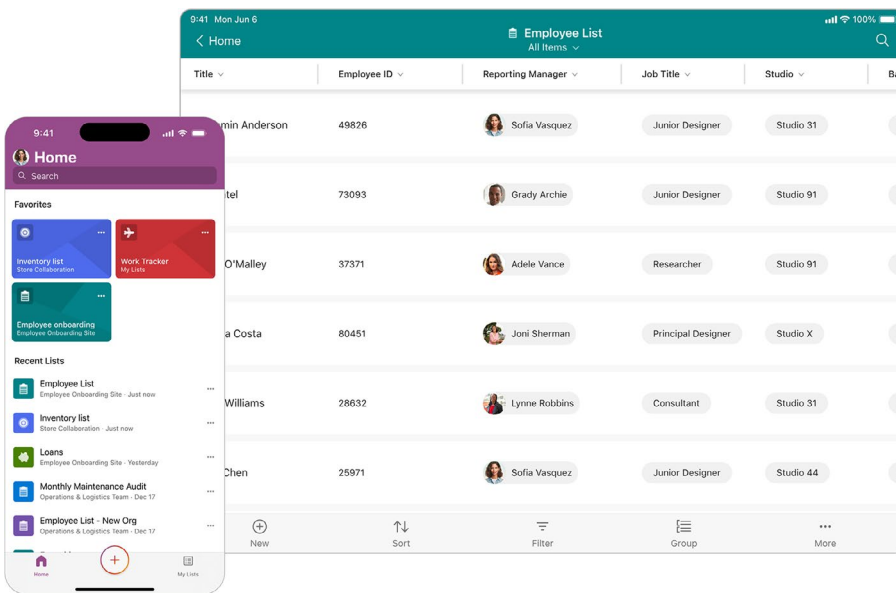 *User value:* Maximize device utility; a warehouse worker can scan product barcodes to update inventory.

Figure 1-4. *Lists has apps for various iOS and Android devices*

Automation and Integration

- Notifications and alerts: Receive timely updates about list changes. (Refer to Chapter 9.)

  User value: Stay informed; team leads get notified when tasks are completed.

- Microsoft Teams: Access and modify lists directly within Teams. (Refer to Chapter 2.)

  User value: Centralize collaboration; teams can use lists and list items directly in Teams without the need of opening Lists separately.

- Microsoft Power Automate: Design automated workflows based on list data and actions. (Refer to Chapter 9.)

  User value: Optimize processes; HR can set up a hiring workflow that triggers background checks once an applicant's status changes to Hired.

- Power Platform: Connect lists with other Microsoft and third-party products. (Refer to Chapter 9.)

  User value: Achieve interconnected workflows; sales information in Lists can auto-populate Power BI dashboards to show insights.

Web and Platform Integration

- List web parts: Embed lists within SharePoint pages for increased visibility. (Refer to Chapter 9.)

  User value: Centralize information presentation; SharePoint pages can display monthly employee achievements.

- Offline availability: Interact with lists without an active Internet connection, syncing when back online. (Refer to Chapter 5.)

  User value: Work uninterrupted; field researchers can use list in remote locations and sync when back in the office.