

Spoken Word

Registers vs Excel, and datasheet view

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29th March 2016



Jonathan Stuckey

Business Information Strategy



about Spoke

- Information Management and SharePoint consultancy
- Established in 2008 as Knowledge Cue
- Rebranded to Spoke in 2013
- Small team of experts
- Medium – large enterprise & government clients

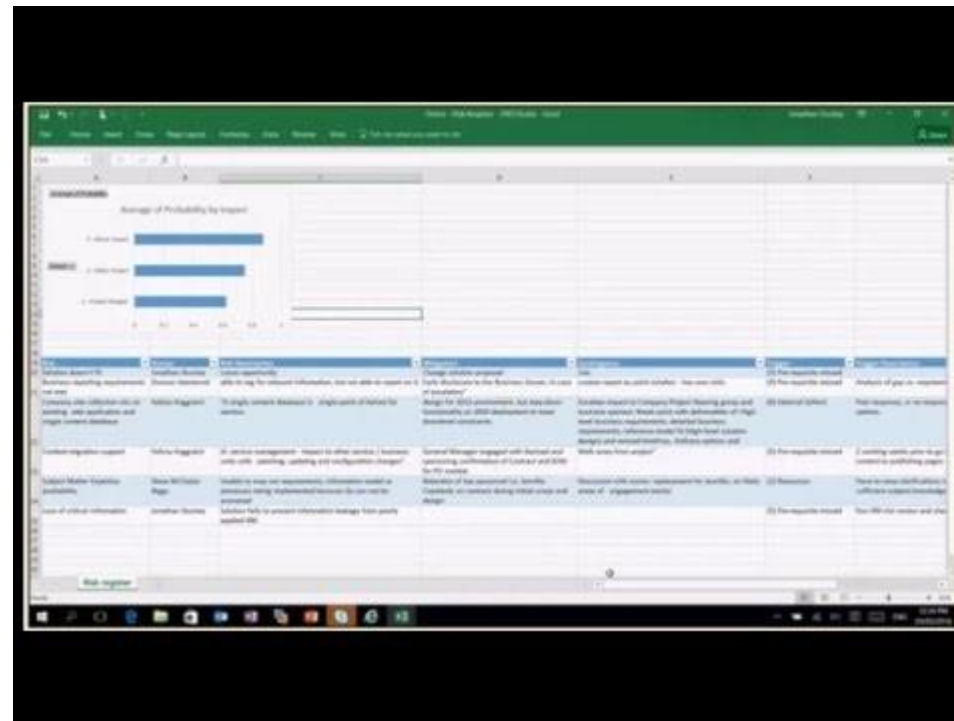
Some of the organisations we work with



Event video: 29th March 2016

Event broadcast can be found on Spoke YouTube channel: [TimeWeSpoke](#)

Direct link for [Spoken Word event 29th March session](#)



Excel vs. Registers

Excel and SharePoint





Excel + SharePoint list

Demo - Risk Register - 290316.xlsx - Excel

Jonathan Stuckey

Mitigation	Contingency	Trigger	Trigger Description	Probability	Impact	Due Date
Change solution proposal	Lies	(5) Pre-requisite	Analysis of gap vs. requirements in solution assessment	100%	1 - Project Stopper	30/04/2015
Early disclosure to the Business Owner, in case of escalation"	custom report as point solution - has own risks	(5) Pre-requisite missed	Poor response, or no response from Helpdesk and/or IT on initial service configuration options.	100%	2 - Major Impact	23/05/2014
design for 2013 environment, but step-down functionality on 2010 deployment to meet downlevel constraints	Escalate impact to Company Project Steering group and business sponsor; Break-point with deliverables of: High-level business requirements, detailed business requirements, reference model fit (high-level solution design) and revised timelines. Delivery options and	(6) External [other]	2 working weeks prior to go-live no resources or availability to migrated documents, or add content to publishing pages - specifically lifecycle and faq	100%	3 - Minor Impact	23/05/2014
General Manager engaged with Rachael and sponsoring confirmation of Contract and SOW for PO number	Walk away from project"	(5) Pre-requisite missed	Have to raise clarifications in content, activity or role analysis and no one able to respond with sufficient subject knowledge"	25%	1 - Project Stopper	23/05/2014
Retention of key personnel i.e. Jennifer Copeland, on contract during Initial scope and design	Discussion with owner, replacement for Jennifer, on likely areas of engagement (early)	(2) Resources	Run ISM risk review and check for remediations required	75%	3 - Minor Impact	23/05/2014
		(5) Pre-requisite missed		50%	2 - Major Impact	28/05/2015



Project Office Programmes

Customer Site Risk register

new item

By rating All items Data entry Find an item

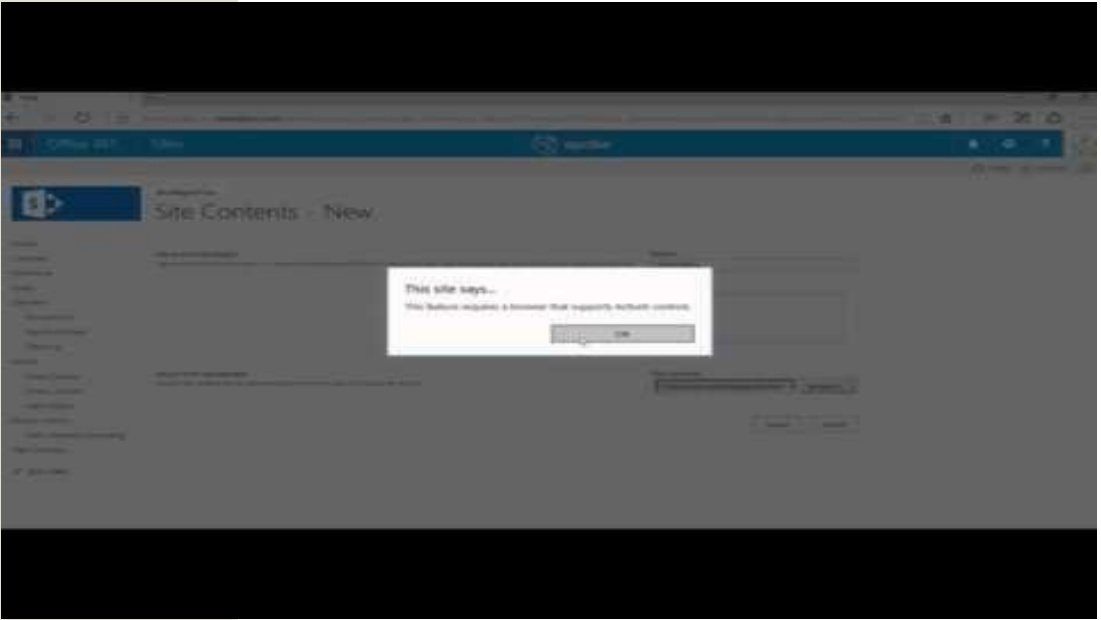
	Risk	Owner	Mitigation	Trigger	Probability	Impact	Due Date
✓ Risk indicator : (2)	Solution doesn't fit	Jonathan Stuckey	Change solution proposal	(5) Pre-requisite missed	100	1 - Project Stopper	30/04/2015
	Business reporting requirements not met	Duncan Hammond	Early disclosure to the Business Owner, in case of escalation"	(5) Pre-requisite missed	100	2 - Major Impact	23/05/2014
⚠ Risk indicator : (3)	Content migration support	Felicia Anggraini	General Manager engaged with Rachael and sponsoring confirmation of Contract and SOW for PO number	(5) Pre-requisite missed	25	1 - Project Stopper	23/05/2014
	Loss of critical information	Jonathan Stuckey		(5) Pre-requisite missed	50	2 - Major Impact	28/05/2015
	Company site collection sits on existing web application and single content database	Felicia Anggraini	design for 2013 environment, but step-down functionality on 2010 deployment to meet downlevel constraints	(6) External [other]	100	3 - Minor Impact	23/05/2014
⚠ Risk indicator : (1)	Subject Matter Expertise availability	Steve McTaylor-Biggs	Retention of key personnel i.e. Jennifer Copeland, on contract during initial scope and design	(2) Resources	75	3 - Minor Impact	23/05/2014



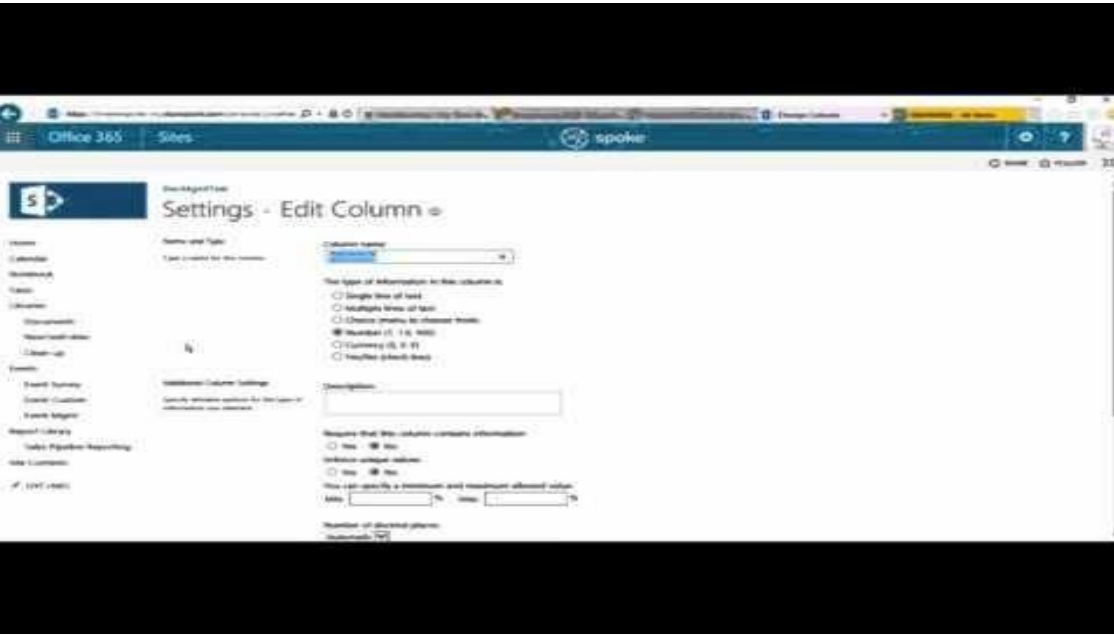


Videos

Importing a spreadsheet to create a list



Updating columns to apply constraints



Adding security constraints to the register
applying mandatory data requirements



Question and answer

Question	Answer
how do I add different constraints like - people, or a look-up or HTML link?	For non-default data constraint options, like a look-up or HTML, you have to add a new column to your list post import, select the constrain type and then copy and paste the data into the column.
when importing spreadsheet I got an error saying could find the plugin. I am using Chrome/Edge/other browser	The import app uses an ActiveX component in Office. You will only be able to create the spreadsheet this way using Internet Explorer.
I got an error about the spreadsheet data when trying to import a selected table from the workbook	<p>There could be several reasons, but the most common are</p> <ul style="list-style-type: none">i. the table of data has macro or vba enabled in itii. the table uses referential formulas or lookups to other sheets <p>the way to import around it is to copy the data to a new datasheet in the workbook, paste in the values only and format as a table - then re-try the import.</p>
We use Excel for registers, for analysis and charts. Are there charting options or apps that work on the list data?	<p>Yes – there are a couple of ways to achieve this. Note: options 2 and 3 require training...</p> <ol style="list-style-type: none">1. Excel web-application will allow you to show charts, linked to data from a list2. SharePoint Enterprise features (which needs to be enabled at the site-collection level)3. Report library feature which allows you create 'RAG' reporting list and web-parts <p>These different sets capabilities allow you to represent data in rich visual manner.</p> <p><i>For more details please come to the 'dashboards for beginners – no PowerBI' session.</i></p>

Datasheet view

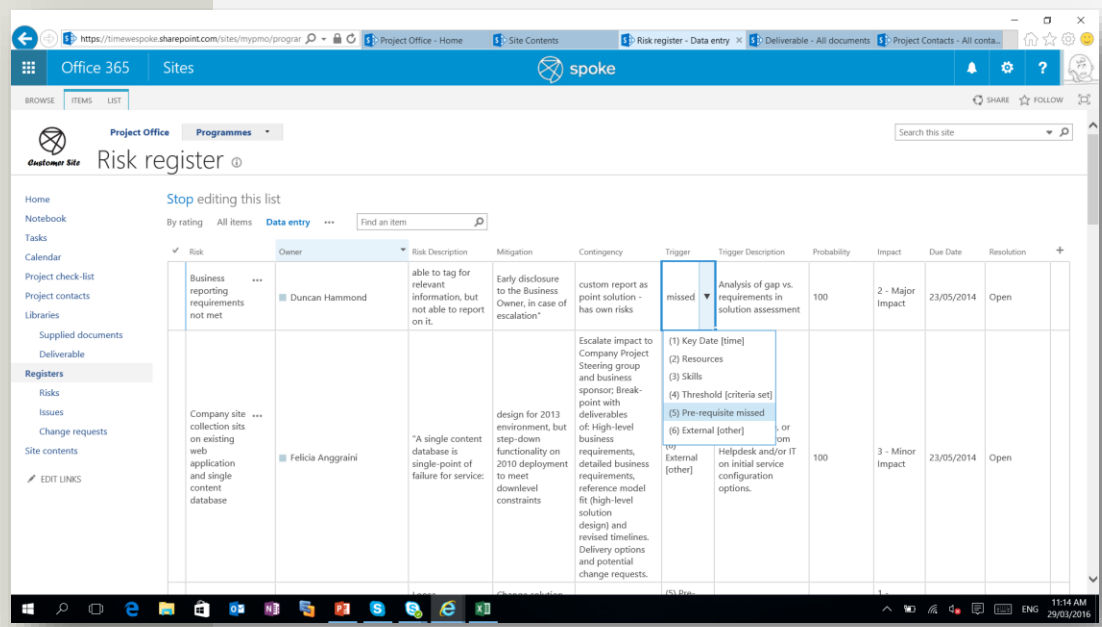
SharePoint Lists and Library views





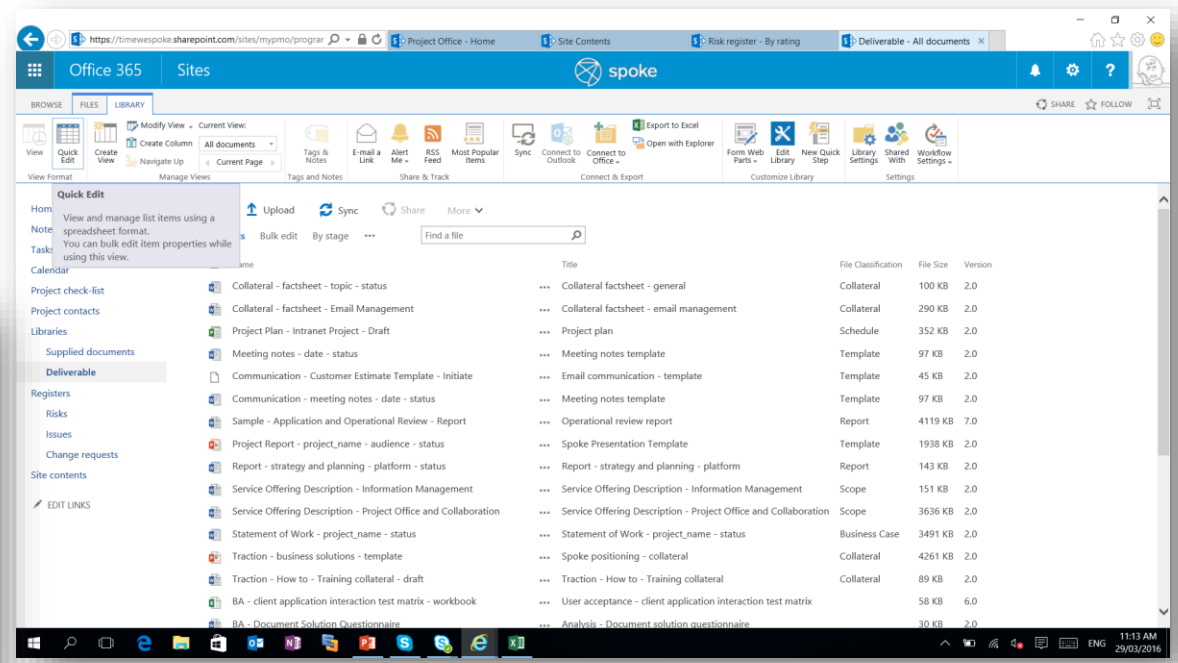
Datasheet – tips, tricks

Bulk-tagging from lists



The screenshot shows the 'Risk register' datasheet in the Spoke application. The interface includes a left sidebar with navigation links like Home, Notebook, Tasks, Calendar, and Project check-list. The main area displays a table with columns for Risk, Owner, Risk Description, Mitigation, Contingency, Trigger, Trigger Description, Probability, Impact, Due Date, and Resolution. Two rows of data are visible, each with a dropdown menu for the Trigger column.

Risk	Owner	Risk Description	Mitigation	Contingency	Trigger	Trigger Description	Probability	Impact	Due Date	Resolution
Business reporting requirements not met	Duncan Hammond	able to tag for relevant information, but not able to report on it.	Early disclosure to the Business Owner, in case of escalation	custom report as point solution - has own risks	missed	Analysis of gap vs. requirements in solution assessment	100	2 - Major Impact	23/05/2014	Open
Company site collection sites on existing web application and single content database	Felicia Anggraini	"A single content database is single-point of failure for service:	design for 2013 environment, but step-down functionality on 2010 deployment to meet downlevel constraints	Escalate impact to Company Project Steering group and business sponsor; Break-point with deliverables of high-level business requirements, detailed business requirements, reference model fit (high-level solution design) and revised timelines. Delivery options and potential change requests.	(1) Key Date [time] (2) Resources (3) Skills (4) Threshold [criteria set] (5) Pre-requisite missed (6) External [other]	Helpdesk and/or IT on initial service configuration options.	100	3 - Minor Impact	23/05/2014	Open



The screenshot shows the 'Deliverable' list in the Spoke application. The interface includes a top navigation bar with 'Office 365' and 'Sites' tabs. The main area displays a table with columns for Title, File Classification, File Size, and Version. The table lists various deliverables such as 'Collateral - factsheet - topic - status', 'Project Plan - Intranet Project - Draft', and 'Meeting notes - date - status'.

Title	File Classification	File Size	Version
Collateral - factsheet - topic - status	Collateral	100 KB	2.0
Collateral - factsheet - Email Management	Collateral	290 KB	2.0
Project Plan - Intranet Project - Draft	Schedule	352 KB	2.0
Meeting notes - date - status	Template	97 KB	2.0
Communication - Customer Estimate Template - Initiate	Template	45 KB	2.0
Communication - meeting notes - date - status	Template	97 KB	2.0
Sample - Application and Operational Review - Report	Report	4119 KB	7.0
Project Report - project_name - audience - status	Template	1938 KB	2.0
Report - strategy and planning - platform - status	Report	143 KB	2.0
Service Offering Description - Information Management	Scope	151 KB	2.0
Service Offering Description - Project Office and Collaboration	Scope	3636 KB	2.0
Statement of Work - project_name - status	Business Case	3491 KB	2.0
Traction - business solutions - template	Collateral	4261 KB	2.0
Traction - How to - Training collateral - draft	Collateral	89 KB	2.0
BA - client application interaction test matrix - workbook		58 KB	6.0
BA - Document Solution Questionnaire		30 KB	2.0

Consistent data on import of documents

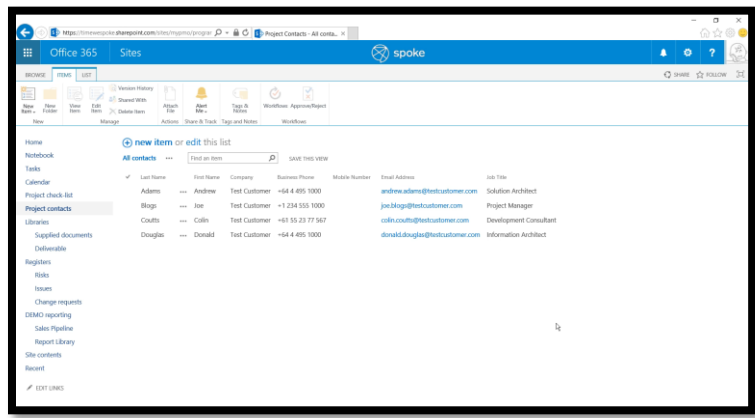
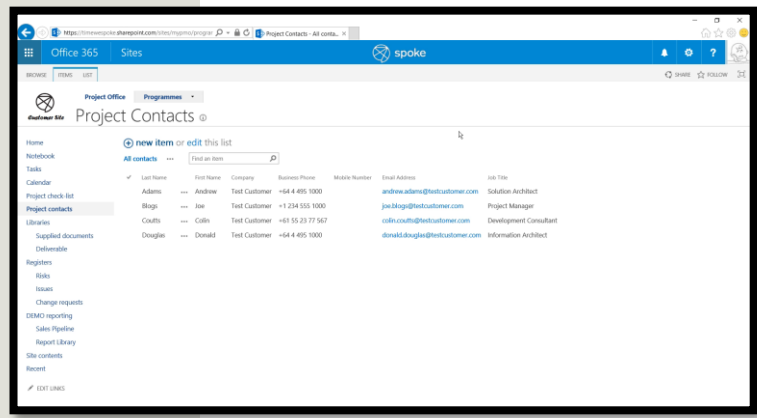




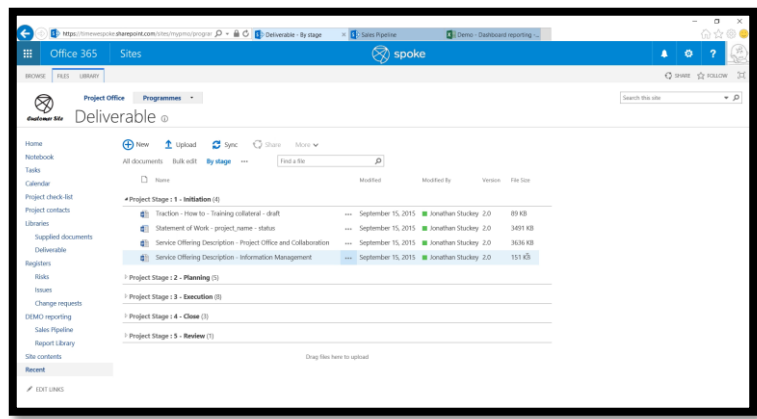
Videos

Bulk load data column to contacts list

Re-order data before bulk-upload



Applying metadata to bulk-update





Question and answer

Question	Answer
What happens if I paste in table data and something doesn't get saved properly?	Each item pasted in is saved individually, which means you may see 1 – 50 are ok, 51, 55 and 60 – 70 fail. This being the case you are better off identifying why failed, delete and re-add all the data once clean - otherwise it may be easier to paste a column at a time.
When I paste (ctl+v) into the datasheet view nothing happens. I am using Edge/Chrome	This action utilises an Office plugin, which means cut-n-paste (currently) only works in datasheet view when using Internet Explorer
I paste multiple row, but only the first one appears and is saved. What is happening?	If you have gone into datasheet view, and clicked in more than one cell before high-lighting the cell/column to past into the browser looses the focus. Switch to normal view, delete the new row. Switch back to datasheet view, click once on place to start pasting and paste (ctrl-v)
Why use the contact list in the demonstration	The sample contact list app in SharePoint is both complete and designed to synchronise with Outlook contacts and Excel, as well as being a typical solution most people can relate to.
When in datasheet view I want to drag several documents into the library at once, but it's not working?	Drag-n-drop for documents into a library only works on unfiltered, standard views. In a filtered view, or in the datasheet view this does not work – <i>despite showing a message you can on the UI.</i>

Next time...

29th April 2016

Search that works

SharePoint

Mark Orange

A beginners guide to
business dashboards

Excel, SharePoint

Jonathan Stuckey

31st May 2016

Tricks and traps: OneDrive
for business

SharePoint, OD4B

Stephanie Rohloff

Events: pulling together
Registers, Contacts &
Meetings

SharePoint, Outlook,
PowerPoint

Jonathan Stuckey

29th June 2016

Contact lists are not contact
management

Outlook, SharePoint

Stephanie Rohloff



Which topics would you like?

Topic	Product, service
A beginners guide to knowledge bases with wikis	OneNote, SharePoint
When to use documentsets for processes	SharePoint
Everyman approach for online documentation	PowerPoint, SharePoint
Manuals and “how to” videos in minutes	PowerPoint, Word
Ticks and Traps: online events and webinars	Skype for Business, PowerPoint, OneNote
But SURELY it does... (gotchas)	SharePoint
...	



