# **Spoken Word**

Registers vs Excel, and datasheet view

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Director, Principle Consultant



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**Business Information Strategy** 





29<sup>th</sup> March 2016

## 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: <u>TimeWeSpoke</u> Direct link for <u>Spoken Word event 29<sup>th</sup> March session</u>

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## **Excel vs. Registers**



**Excel and SharePoint** 



## **Excel + SharePoint list**

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Issues Change requests	Loss of critical information	••• Jonathan Stuckey		(5) Pre-requisite missed	50	2 - Major Impact	28/05/2015
te contents	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
EDIT LINKS	Risk indicator: (1)						
	Subject Matter Expertise availability	📕 Steve McTaylor-Bigg	s 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

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### Updating columns to apply constraints

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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	There could be several reasons, but the most common are i. the table of data has macro or vba enabled in it ii. the table uses referential formulas or lookups to other sheets the way to import around it is to copy the data to a new datasheet in the workbook, <b>paste in</b> <b>the values only</b> and format as a table - then re-try the import.
We use Excel for registers, for analysis and charts. Are there charting options or apps that work on the list data?	<ul> <li>Yes – there are a couple of ways to achieve this. Note: options 2 and 3 require training</li> <li>1. Excel web-application will allow you to show charts, linked to data from a list</li> <li>2. SharePoint Enterprise features (which needs to be enabled at the site-collection level)</li> <li>3. Report library feature which allows you create 'RAG' reporting list and web-parts</li> <li>These different sets capabilities allow you to represent data in rich visual manner.</li> <li>For more details please come to the 'dashboards for beginners – no PowerBl' session.</li> </ul>



## **Datasheet view**

SharePoint Lists and Library views



## Datasheet – tips, tricks

### Bulk-tagging from lists

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	Traction - How to - Training collateral - draft	Traction - How to - Training collateral	Collateral 89 KB 2	
	BA - client application interaction test matrix - workbook	User acceptance - client application interaction test matrix	58 KB 6	
	BA - Document Solution Questionnaire	Analysis - Document solution guestionnaire	30 KB 2	11-12 AM

#### Consistent data on import of documents



## **Videos**

#### Bulk load data column to contacts list

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### Re-order data before bulk-upload



Applying metadata to bulk-update

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Report Library	Project Stage : 5 - Review (1)	
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## **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...

29 <sup>th</sup> April 2016	Search that works	SharePoint	Mark Orange
	A beginners guide to business dashboards	Excel, SharePoint	Jonathan Stuckey

<u>31<sup>st</sup> May 2016</u>	Tricks and traps: OneDrive for business	SharePoint, OD4B	Stephanie Rohloff
	Events: pulling together Registers, Contacts & Meetings	SharePoint, Outlook, PowerPoint	Jonathan Stuckey
29 <sup>th</sup> June 2016	Contact lists are not contact management	Outlook, SharePoint	Stephanie Rohloff



## Which topics would you like?

Торіс	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	



