



2021

SharePoint, Teams and Viva!

Creating a Modern Teams-First Employee Experience Intranet
Module 3: Lists and Automation

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LISTEN



UNDERSTAND



KNOW



CONNECT



C5insight

Creating a Modern Intranet

Module 3: Lists and Automation



FORMS, LISTS, FLOWS AND PLANNER

Oh My!



BUILDING A NO-CODE APP

How to Build Lists and Automate Tasks



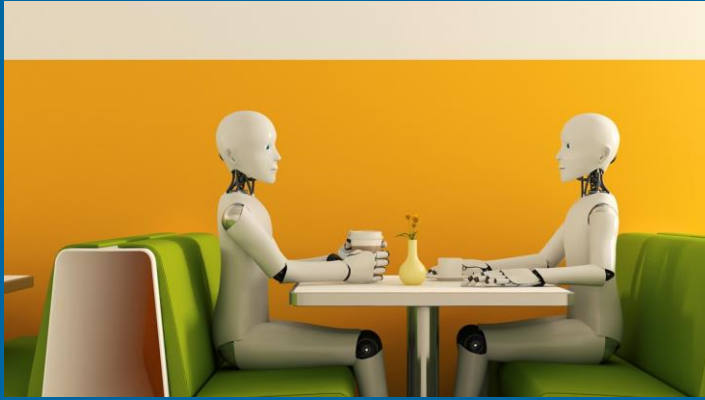
ADVANCED APPS

When You Outgrow Microsoft Lists



SECURITY

Keeping Your Sites, Documents and Lists Safe



FORMS, LISTS, FLOWS AND PLANNER

Oh My!

WHY THIS MODULE?

- Microsoft Lists are a core part of SharePoint and Teams.
- Forms can be a helpful tool for adding items to lists.
- Flows, built in Power Automate are another core part of SharePoint and Teams and are a simple way to automate certain tasks.
- Planner will be shown, but not discussed in detail.

INTRODUCTION

Microsoft Teams

Site Collection, Sites and Sub-Sites

Lists or Libraries/Pages

Columns (Metadata)

Folders

Records or Files

Microsoft Lists behave almost exactly like Document Libraries

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INTRODUCTION

The background of the slide features two white humanoid robots sitting at a white table. The robot on the left is holding a white coffee cup. On the table, there is also a small yellow vase with a few flowers. The robots are sitting on green chairs. The background is a solid olive green color.

- Microsoft Lists
- Forms and Power Automate
- Approval Flows in Power Automate

Content Log List – 4:55

Suggestion Box – 4:11

Content Approvals – 8:43



BUILDING A NO-CODE APP

How to Build Lists and Automate Tasks

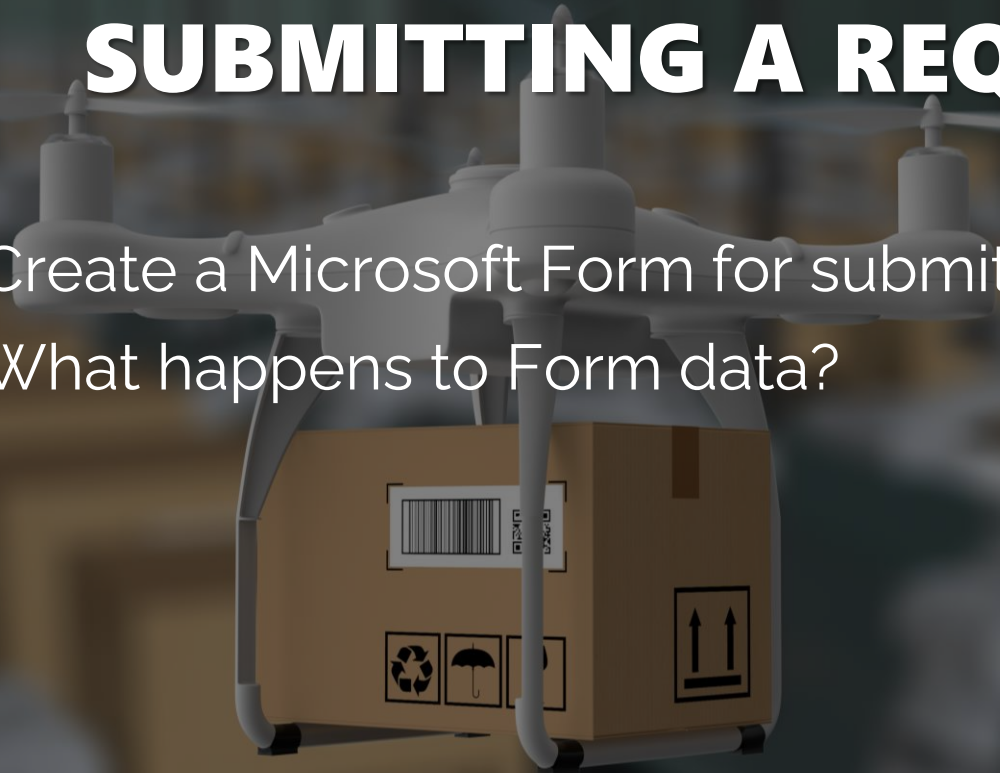
SCENARIO



- Contoso Marketing gets many requests for new or updated document templates
- They want to make it easy for their co-workers to submit requests, prioritize and approve them
- And they want to manage the process of creating and updating templates within their department

SUBMITTING A REQUEST

- Create a Microsoft Form for submitting a request
- What happens to Form data?



Create a Form with Branching – 2:59

CREATING A REQUEST LIST

A white quadcopter drone is shown from a top-down perspective, carrying a brown cardboard box. The box has a barcode, a recycling symbol, an umbrella icon, and two upward-pointing arrows. The background is a blurred, dark scene of a city at night.

- Using a Microsoft List to keep track of requests
 - Creating a List on a SharePoint site
 - Adding columns
 - Views and Formatting – just like document libraries

Microsoft List Basics – 2:39

FLOW: CONNECT FORM TO LIST

- Create a Power Automate flow to automatically move items from the Microsoft Form to the Microsoft List
 - Power Automate templates
 - Building a flow from scratch
- Usually we stop and test at this point – but we'll wait until the end to do that today

Flow from Form to List – 5:02

PLANNER

- A place to manage the process of creating and updating document templates (or other simple projects)

Add Planner to SharePoint Site – 0:55

APPROVAL

- Using Power Automate to
 - Efficiently manage accepting (or rejecting) items
 - Automatically add items to Planner

Flow Approval and List Update – 6:58

OUR CREATION



Form, List, Flow, Planner – 2:39

WHAT YOU LEARNED TODAY



THE FULL POTENTIAL OF

Lists

Power Automate

Forms

Planner



ADVANCED APPS

When You Outgrow Microsoft Lists

INTO THE DATAVERSE!

	Microsoft Lists	Dataverse for Teams	PowerApps	Dynamics 365
Learning Curve (for Creating)	Very Low	Moderate	High	Very High
Flat Lists	✓	✓	✓	✓
Relational Database		✓	✓	✓
Canvas Apps	✓	✓	✓	✓
Model-Driven Apps			✓	✓
Mobile Access	✓	✓	✓	✓
Mobile App with Offline Access			✓	✓
Common Data Model (Accounts, Contacts, Activities, etc)		✓	✓	✓
Advanced Data Types (customer, currencies)			✓	✓
Outlook Integration			✓	✓
Pre-Built Apps & Enhanced Data Model (Sales, Service, Projects, Marketing)				✓
Storage	30M Records	1M records or 2GB	4TB+	4TB+
Security	Table + Sharing	Record	Field + Sharing	Field + Sharing
Databases (Environments)	Unlimited	1 / Team	Unlimited	Unlimited
License Cost	Included	Included	\$	\$\$



SECURITY

Keeping Your Sites, Documents and Lists Safe

SHAREPOINT SECURITY IS INHERITED

Microsoft Teams

```
graph TD; A[Microsoft Teams] --> B[Site Collection, Sites and Sub-Sites]; B --> C[Lists or Libraries/Pages]; C --> D[Folders]; D --> E[Records or Files];
```

Site Collection, Sites and Sub-Sites

Lists or Libraries/Pages

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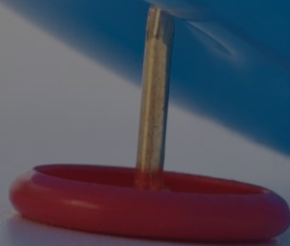
BEST PRACTICE DISCUSSION

Teams-First Security

- Set security roles on the Microsoft Team
- Don't change them anywhere – use Teams to drive security
- Create more Teams and Private Channels if necessary
- Scenarios
 - Leadership Team, M&A Projects
 - IT Confidential and IT Public/Helpdesk Information

BONUS VIDEOS

- Teams and SharePoint Security Deep Dive
- Check the downloadable for the PDF
- Links in the PDF to many videos for training and demos



MODULE 3: HELPFUL LINKS

- [Microsoft Lists - Microsoft Tech Community Resource Center](#)
- [Microsoft-Lists_Look-Book.pdf](#)
- [Examples of Formulas in Lists](#)
- [Configure forms and rules in Microsoft Lists](#)
- [Create and test an approval workflow with Power Automate.](#)
- [Use markdown to format Power Automate approvals](#)
- [How to create a Parent / Child PowerApp with SharePoint Lists](#)
- [How does Audience Targeting in a List / Document Library work?](#)
- [How to aggregate multiple lists into one list?](#)



C5insight

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Digital Customer and Employee Engagement

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REFRESH & RECHARGE