

SharePoint Online Site Owner Tutorial

Contents

Adding Issues Tracking App	1
Customizing Issues Tracking App	1
Set Active as the Default View	1
Add Completed Date Column	2
Modify Views to Include Completed Date Column.....	2
Modify Active View to Include More Mobile Items.....	2
Add Issues Tracking App to Quick Launch Menu	2
Add Issues Tracking Web Part to Home Page.....	3
Prevent All Tasks From Appearing in Tasks App on Home Page.....	3
Customizing Tasks App.....	3
Remove Show More When Editing.....	3
Add Completed Date Column	3
Modify Views to Include Completed Date Column.....	4
Add Comments Column and Allow Multiple Comments	4

Adding Issues Tracking App

- Click **Settings->Add an app**
- Click **Issue Tracking**

Customizing Issues Tracking App

Set Active as the Default View

- Click **Settings->Site Contents**
- Click **Issues Tracking** app list
- Click the **three dots** in the Issues Tracking menu
- Click **Modify this view**
- Click **Settings** breadcrumb
- Under Views, click **Active Issues**
- Select **Make this the default view**
- Select **Make this view the default view for mobile access**
- Select **OK**

Add Completed Date Column

- Click **Settings->Site Contents**
- Click **Issues Tracking** app list
- Click **List** tab
- Click **Create Column**
- Enter text for Column name: **Completed Date**
- Date and Time Format: **Date Only**
- Default value: **None**
- Click **OK**

Modify Views to Include Completed Date Column

- Click **Settings->Site Contents**
- Click **Issues Tracking** app list
- Click **List** tab
- Click **List Settings**
- Under Views, click **All Issues**
- **Check Completed Date**
- Click **OK**
- Click **List** tab
- Click **List Settings**
- Under Views, click **My Issues**
- **Check Completed Date**
- Click **OK**

Modify Active View to Include More Mobile Items

- Click **Settings->Site Contents**
- Click **Issues Tracking** app list
- Click **List** tab
- Click **List Settings**
- Click **List** tab
- Click **List Settings**
- Under Views, click **Active Issues**
- Under Mobile section, change “Number of Items...” to **10**

Add Issues Tracking App to Quick Launch Menu

- Click **Settings->Site Contents**
- Click **Issues Tracking** app list
- Click **List** tab
- Click **List Settings**
- Click **List name, description, and navigation**
- Select **Yes** under “Display the list on the Quick Launch?”

Add Issues Tracking Web Part to Home Page

- Navigate to home page of site
- **Settings->Edit Page**
- Click **Add a Web Part**
- Select **Apps** Category, **Issues** Part, Add part to: **Left**
- Click **Add**

Prevent All Tasks From Appearing in Tasks App on Home Page

- Navigate to home page of site
- **Settings->Edit Page**
- **Hover** over **Tasks** web part and Click the **check box** that appears
- Click **List** tab
- Click **Modify View**
- You may be prompted to click **Leave**
- In the Filter section, select **“Show items only when the following is true:”**
 - Then, under “Show the items when column” choose the following:
 - **% Complete**
 - **“is not equal to”**
 - Enter the value **“100”**

Customizing Tasks App

Remove Show More When Editing

- Click **Settings->Site Contents**
- Click **Tasks** app task list
- Click **List** tab
- Click **List Settings**
- Under **Content Types**, click **Task**
- Under **Columns**, click **Column order**
- Modify **Predecessors** to be the last position from top
- Click **OK**

Add Completed Date Column

- Click **Settings->Site Contents**
- Click **Tasks** app task list
- Click **List** tab
- Click **Create Column**
- Enter text for Column name: **Completed Date**
- Date and Time Format: **Date Only**
- Default value: **None**
- Click **OK**

Modify Views to Include Completed Date Column

- Click **Settings->Site Contents**
- Click **Tasks** app task list
- Click **List** tab
- Click **List Settings**
- Under **Views**, click **All Tasks**
- **Check Completed Date**
- Click **OK**
- Click **List** tab
- Click **List Settings**
- Under Views, click **Completed**
- **Check Completed Date**
- Click **OK**
- Click **List** tab
- Click **List Settings**
- Under **Views**, click **My View (Hide Completed)**
- **Uncheck Completed Date**
- Click **OK**
- Click **List** tab
- Click **List Settings**
- Under **Views**, click **My Tasks**
- **Check Completed Date**
- Click **OK**

Add Comments Column and Allow Multiple Comments

- Click **Settings->Site Contents**
- Click **Tasks** app task list
- Click **List** tab
- Click **List Settings**
- Click **Versing settings**
- Under **Item Version History**, select **Yes**
- Click **OK**
- Under **Columns**, Click **Create Column**
- Enter text for Column name: **Comments**
- Select: **Multiple lines of text**
- Append Changes: Select **Yes**