Creating a SharePoint List for Expense Submissions

A comprehensive guide detailing the setup of a SharePoint list, including the creation of 10 columns tailored for managing Expense Submissions efficiently.

Step 1: Create a New List

- Go to the SharePoint site where you want to create the list.
- Click on the Settings icon and select Site contents.
- Click on New and select List.
- Click Blank list.
- Enter a name for the list: **Expense Submissions**, Uncheck the Show in Site navigation checkbox and click Create.

Step 2: Add and Configure the Columns

- Click on Add Column, next to the title column.
  - This will open a menu with different column types. Select the type of column you want to add and click Next.
  - Enter the Column name and format your column.
  - Click Save.
- Repeat this process for each of the 6 columns shown below.
- To edit the settings of a column, such as default value, or choices, click on the column name. Then, select Column settings and then Edit. Make the changes you want and click Save.

Column type	Column name	Additional settings	Required
Text, Single line text	Employee Name	None	Yes
Date and Time	Date of Expense	Default value of Today's date	Yes
Choice	Type of Expense	Enter the choices: Travel, Meal, Entertainment, Supplies, Other	Yes
Number, Currency	Amount	Default Value of "0.00" and minimum allowed value of "0.00"	Yes
Text, Single line of text	Notes	None	No
Choice	Approval Status	Enter the choices: Pending, Approved, Rejected. Default Value of Pending	No

Step 3: Hide/Show Columns on the List

- To hide or show columns, left click on any column header, hover over column settings and select "Show/hide columns" from the menu.
- You can show or hide the column by checking or unchecking the column title. If you want the column to appear on the list, check the title. If you want the column to disappear from the list, uncheck the title.
- To change the order of the columns, drag and drop the columns.
- Match the column order below and click apply.
  - ID
  - Employee Name
  - Date of Expense
  - Type of Expense
  - Amount
  - Notes
  - Attachments
  - Approval Status
  - Created
  - Created By

Step 4: Edit the Form

- Click Add new item, then click Edit form and Edit columns.
- Uncheck the Title column and Save.
- The columns should be displayed in this order. If not, adjust accordingly.
  - Employee Name
  - Date of Expense
  - Type of Expense
  - Amount
  - Notes
  - Approval Status
- Close the form.

Step 5: Add Three Items to the List

- Click Add new item.

Examples

Employee Name	Date	Type of Expense	Amount	Notes	Approval	Attachment
Emily Brown	10/24/24	Meal	25.25	Coffee w/ customer	Approved	Receipt 1
Jack Peterson	10/1/24	Supplies	3700.88	New monitors	Pending	Receipt 2
Linda Lopez	10/12/24	Other	150.46	Vehicle repairs	Rejected	Receipt 3