Microsoft SharePoint 2010

6 – Managing list items

CORPORATE **LEARNING & DEVELOPMENT**

MANAGING LIST ITEMS

INFOCUS

As an author or content manager, you may be responsible for the content in one or more lists in a SharePoint site. Here you'll find out how to manage list items including deleting list items.

In this session you will be shown how to:

- ✓ create a new calendar event
- ✓ delete list items and documents
- ✓ recover deleted list items and documents
- ✓ connect **SharePoint** and **Outlook** calendars
- ✓ connect **SharePoint** and **Outlook** tasks lists

CREATING A NEW CALENDAR EVENT

Although the **Calendar** is just another SharePoint list, it is different enough to warrant looking specifically at how you create events. You can use the **New Event** tool on the **Events** tab to create a new event for the current day, or you can hover over the scheduled day and click on the link to create an event for a future date.

Example:

1 We clicked on **Calendar** in the Quick Launch bar to open the **Calendar** list

2 Then we hovered over **Wednesday**, then clicked on **Add** when it appears to open the **New Item** dialog box

This is the day when the event is scheduled…

3 Then typed **Sales Conference** in **Title**

4 And typed **London Trade Centre** in **Location**

5 Next we clicked on the drop arrow for **Start Time** and selected **9 AM**

6 Then clicked on the drop arrow for **End Time** and select **5 PM**

7 Finally we clicked on **[Save]** to add the event to the calendar

Only the start and end times, plus the name of the event will display in the default weekly view of the calendar

2

Calendar - New Item

Edit

Save Cancel Paste Cut Copy Attach File

Commit Clipboard Actions

Title *
Location
Start Time *   21/09/2011   12 PM ▼ 00 ▼
End Time *   21/09/2011   1 PM ▼ 00 ▼
Description

Category   ◉ [▼]
            ○ Specify your own value:

All Day Event   ☐ Make this an all-day activity that doesn't start or end at a specific hour.

Recurrence   ☐ Make this a repeating event.

Workspace   ☐ Use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event.

Save   Cancel

7

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	30	31	1	2	3
	6	7	8	9	10
	13	14	15	16	17
	20	21 9:00 am - 5:00 pm Sales Conference	22	23	24

For Your Reference…

To **create** a **calendar event**:
1. Open the **Calendar**
2. Hover over the desired day, then click on **Add**
3. Enter the event's details and click on **[Save]**

Handy to Know…

- You can create a single or multi-day event without a specific start and end time (just dates) by selecting **All Day Event**.

- If you have a meeting scheduled for the same time and day each week, create a single event and select **Make this a repeating event**.

DELETING LIST ITEMS AND DOCUMENTS

With the correct permissions, you can delete files and list items. (Deleting items requires a different set of permissions than editing them.) You can delete single or multiple items by using the ribbon and you can also delete single items using the drop-down menu. You can also delete files by using the web folders interfaces.

Example:

1 We opened the **Shared Documents** library, then selected both **My Document** and **Invoice Silver Pen**

The Documents tab will open…

2 We clicked on **Delete Document** in the **Manage** group

A message box will display…

3 Then clicked on **[OK]** to move the files to the site's **Recycle Bin**

To delete a list item…

4 We opened the **Calendar** list, then clicked on the border of the **Sales Conference** event to select it

5 Finally we clicked on **Delete Event** in the **Manage** group, then clicked on **[OK]** to delete the list item

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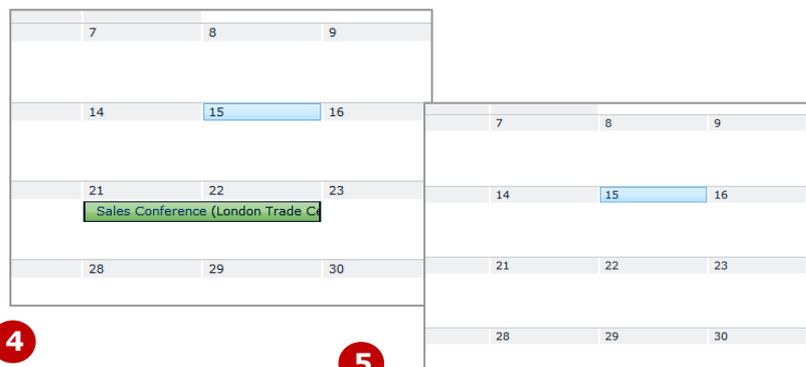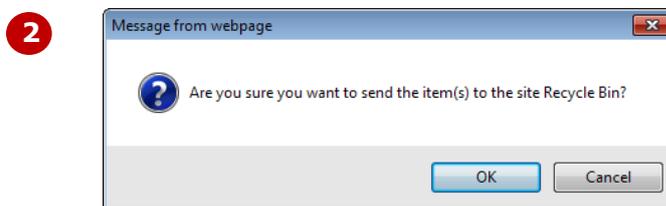
For Your Reference…

To **delete files** and **list items**:
1. Open the library/list and select the item/s
2. Click on **Delete Document**/**Item** in the **Manage** group on the **Documents**/**Items** tab
3. Click on **[OK]**

Handy to Know…

- If the **Delete Document**/**Item** ribbon option is unavailable or the **Delete Item** option doesn't display on the drop-down menu, you don't have the right permissions and you will have to ask the list manager to delete the item.

- To delete a single item, hover over its Title and select **Delete Item** from the menu.

RECOVERING DELETED LIST ITEMS AND FILES

When you delete a file from a library or a list item from a list, they aren't deleted permanently. Deleted items are actually moved into the *Recycle Bin* where they remain for 30 days (this is the default length of time, but your site may have been set up using a different time). As long as the items appear in the Recycle Bin, you can recover them moving them back to their original locations.

Example:

1 We clicked on *Recycle Bin* in the Quick Launch bar to open the *Recycle Bin* page

The contents of your bin will differ to ours shown here; we've got an event and two documents, plus the draft version of a document that we deleted earlier. To restore a file and event…

2 Then we selected *Sales Conference* and *Invoice Silver Pen.xlsx* by clicking in their check boxes, then clicked on *Restore Selection*

You'll be prompted to confirm your choice…

3 We clicked on **[OK]**

To permanently delete two unwanted documents…

4 We selected *My Document.docx* and *No Smoking Policy.docx*, then clicked on *Delete Selection* and clicked on **[OK]** to delete them

To check our restored items…

5 We opened the *Shared Documents* library and then the *Calendar* list

1

	Type	Name	Original Location	Created By	Deleted↓	Size
□		Sales Conference	/sites/New York/Lists/Calendar	Amanda Bennett	15/09/2011 12:27 PM	< 1 KB
□		Invoice Silver Pen.xlsx	/sites/New York/Shared Documents	Peter Dawson	15/09/2011 12:24 PM	41.4 KB
□		My Document.docx	/sites/New York/Shared Documents	Amanda Bennett	15/09/2011 12:24 PM	23.2 KB
□		No Smoking Policy.docx (1.1)	/sites/New York/Shared Documents	Amanda Bennett	15/09/2011 11:51 AM	21 KB

Restore Selection   ✕ Delete Selection

3

Restore Selection   ✕ Delete Selection

	Type	Name	Original Location	Created By	Deleted↓	Size
□		My Document.docx	/sites/New York/Shared Documents	Amanda Bennett	15/09/2011 12:24 PM	23.2 KB
□		No Smoking Policy.docx (1.1)	/sites/New York/Shared Documents	Amanda Bennett	15/09/2011 11:51 AM	21 KB

4

Restore Selection   ✕ Delete Selection

	Type	Name	Original Location	Created By	Deleted↓	Size

There are no items in the recycle bin.

5

	Type	Name	Modified	Modified By
		Environmental Health and Safety Policy	15/09/2011 10:53 AM	Amanda Bennett
		Internet And Email Policy	15/09/2011 10:58 AM	Peter Dawson
		Invoice Silver Pen	15/09/2011 10:58 AM	Amanda Bennett
		No Smoking Policy	15/09/2011 11:51 AM	Amanda Bennett
		Quarterly Report Indoor Oasis	15/09/2011 10:58 AM	Peter Dawson
		Sales Figures Silver Pen	15/09/2011 11:13 AM	Amanda Bennett
		Service Profile Indoor Oasis	15/09/2011 11:05 AM	Amanda Bennett

✚ Add document

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31	1		2	3
6	7	8		9	10
13	14	15		16	17
20	21	22	Sales Conference (London Trade Ce	23	24

For Your Reference…

To *recover deleted files* and *list items*:
1. Open the *Recycle Bin*
2. Select the desired items
3. Click on *Restore Selection*
4. Click on **[OK]**

Handy to Know…

- If the file or list item that you want to recover is not in the *Recycle Bin*, contact your site administrator. The administrator may be able to recover the deleted file/list item because SharePoint moves expired files and list items from the site's Recycle Bin to the administrator's Recycle Bin.

CONNECTING SHAREPOINT AND OUTLOOK CALENDARS

You can connect the SharePoint *Calendar* list to Outlook. This process opens the team calendar in Outlook letting you see all meetings and events that were scheduled in SharePoint. If you add or change a meeting in Outlook and then switch back to SharePoint, these changes will appear in the SharePoint calendar.

Example:

1 We opened the *Calendar* list, then clicked on the *Calendar* tab

2 Then we clicked on *Connect to Outlook* in the *Connect & Export* group

A message box may appear…

3 We clicked on **[Allow]** if the message box appeared, and on **[Allow]** and on **[Yes]** if prompted to connect to Outlook

A new team site will open automatically next to your personal calendar…

4 Next we right-clicked on the green title tab of the *Train1* team calendar in the right pane and selected **Overlay** to make it easier to see both calendars simultaneously

To add a meeting…

5 We clicked on a timeslot and typed **Meeting** to add a meeting to the team calendar (the meeting should be green, not blue which it would be if we had added it to the personal calendar), then pressed F9 to send all folders

6 Finally we closed Outlook and pressed F5 to refresh the *Calendar* and see the new meeting
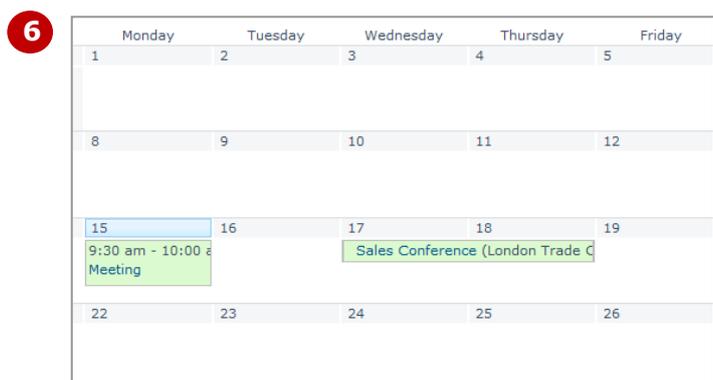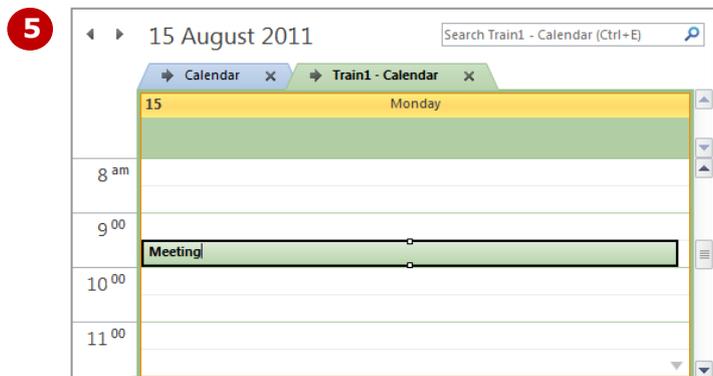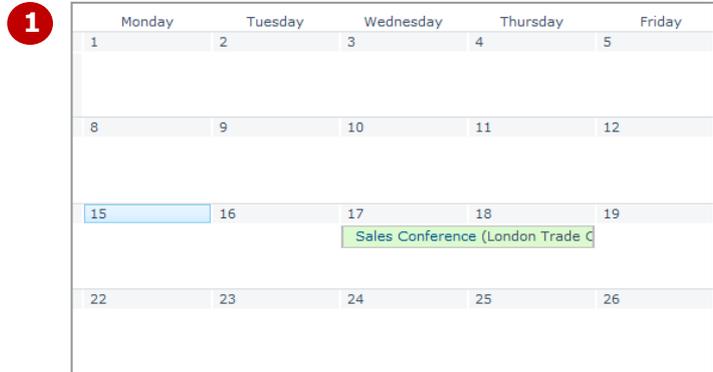
For Your Reference…

To connect *SharePoint* and *Outlook Calendars*:

1. Open the *Calendar* in SharePoint
2. Click on *Connect to Outlook* in the *Connect & Export* group on the *Calendar* tab
3. Add a meeting in the team calendar in the right pane, press F9 and exit Outlook

Handy to Know…

- Appointments added to your personal calendar will not appear in the team calendar in SharePoint.

- By placing the team site over your personal site, you can see more clearly when you have appointments scheduled in both calendars.

CONNECTING SHAREPOINT AND OUTLOOK TASK LISTS

There is significant duplication between Outlook and SharePoint. Although SharePoint doesn't provide general emailing capability, it does include calendar, tasks and contact lists. As a result of this, you can work on tasks in either SharePoint or Outlook and by connecting the two, you can synchronise both environments.

Example:

1 We opened the *Tasks* list, then clicked on the *List* tab

2 Then we clicked on *Connect to Outlook* in the *Connect & Export* group

A message box may appear…

3 We clicked on **[Allow]** if the message box appeared, and on **[Allow]** and on **[Yes]** if prompted to open the *Tasks* area of Outlook

The two tasks that were created in SharePoint will appear under Other Tasks.

From Outlook, you can quickly create a new task. Any tasks created here will appear in SharePoint as well…

4 We clicked on the link *Click here to add a new Task* and typed **New Task** in *Subject*

If your view doesn't have this empty input box, click on New Task, type New Task in Subject and click on [Save & Close]…

5 Finally we pressed F9 , closed Outlook and then pressed F5 to refresh the *Tasks* list in SharePoint

The new task will appear in the Tasks list
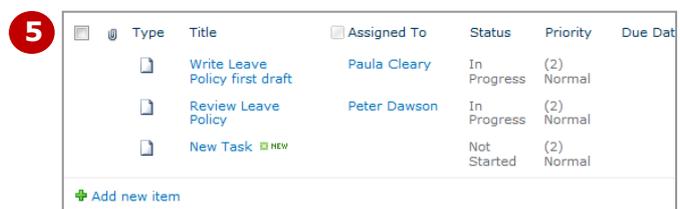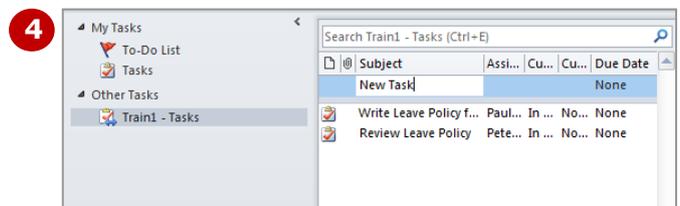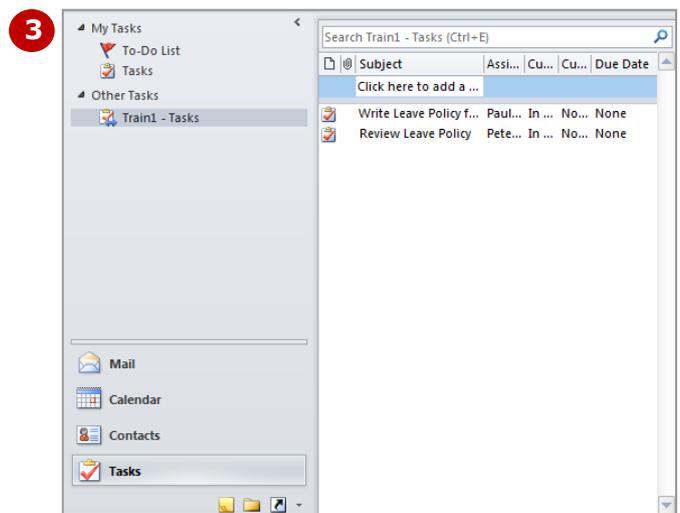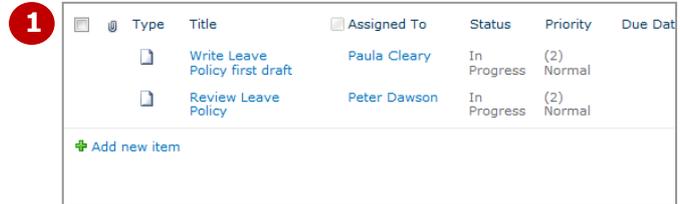
For Your Reference…

To connect *SharePoint* and *Outlook Tasks*:

1. Open the *Tasks* list in SharePoint
2. Click on *Connect to Outlook* in the *Connect & Export* group on the *List* tab
3. Add tasks as desired, press F9 and exit Outlook

Handy to Know…

- If you have both Outlook and SharePoint open and you add a new task in SharePoint, press F9 in Outlook to update the Outlook Tasks list from the server.

- If you have a contacts list in SharePoint, synchronise it using the above steps as most people write emails using Outlook.

CONCLUDING REMARKS

Congratulations!

You have now completed the **Managing list items** booklet. This booklet was designed to get you to the point where you can competently perform a variety of operations as listed in the objectives on page 2.

We have tried to build up your skills and knowledge by showing you specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

Where To From Here…

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the application's commands. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it - small is a good way to start.

- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go - these step-by-step notes were designed to help you in the classroom and in the work place!

Here are a few techniques and strategies that we've found handy for learning more about technology:

- visit CLD's e-learning zone on the Intranet

- read computer magazines - there are often useful articles about specific techniques

- if you have the skills and facilities, browse the Internet, specifically the technical pages of the application that you have just learnt

- take an interest in what your work colleagues have done and how they did it - we don't suggest that you plagiarise but you can certainly learn from the techniques of others

- if your software came with a manual (which is rare nowadays) spend a bit of time each day reading a few pages. Then try the techniques out straight away - over a period of time you'll learn a lot this way

- and of course, there are also more courses and booklets for you to work through

- finally, don't forget to contact CLD's IT Training Helpdesk on **01243-752100**