

**Scott A. Concilla**

Microsoft Certified Trainer  
LCG Systems



# SharePoint 2010

## Working with Lists for End Users

# Class Scope and Purpose

- Description
  - The class covers the basics of working in a SharePoint list for end users.
- Audience
  - Anyone who uses a SharePoint list.
- Prerequisite
  - SharePoint 2010 - Introduction

# Class Main Topics

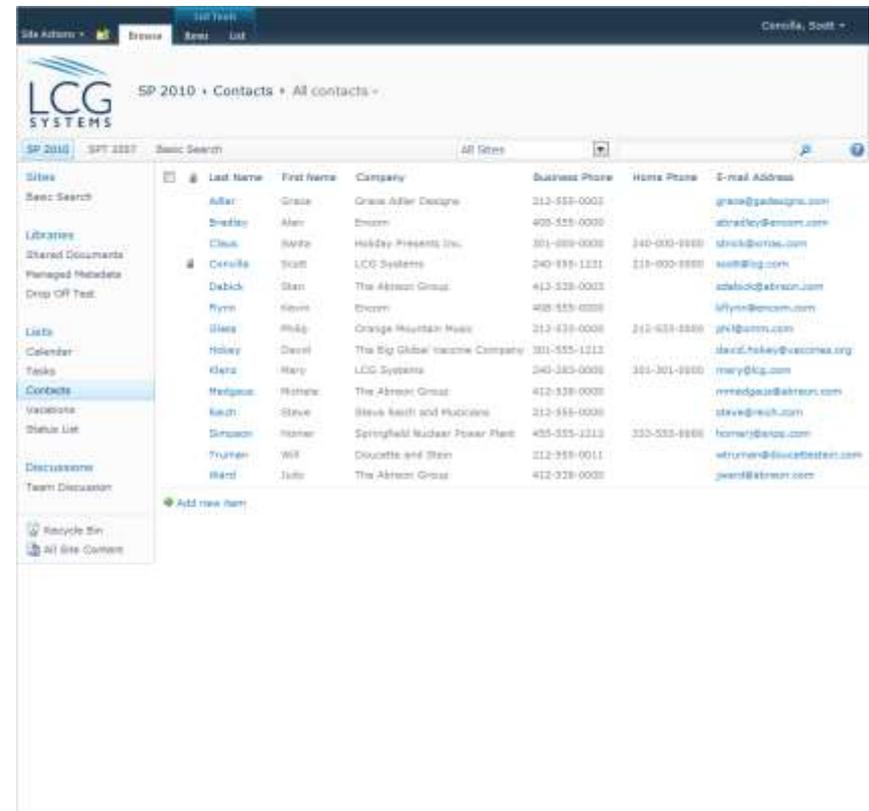
- Introduction to SharePoint Lists
- Navigating a List
- Working with List Items
- Working with List Item Attachments
- Using Datasheet View
- Creating Personal Views of a List
- Integrating Lists with Excel and Outlook
- Using Alerts
- E-mailing Links

# Introduction to Lists

- Defining Lists
- Built-in Lists
- Custom Lists
- List Tasks and Permissions

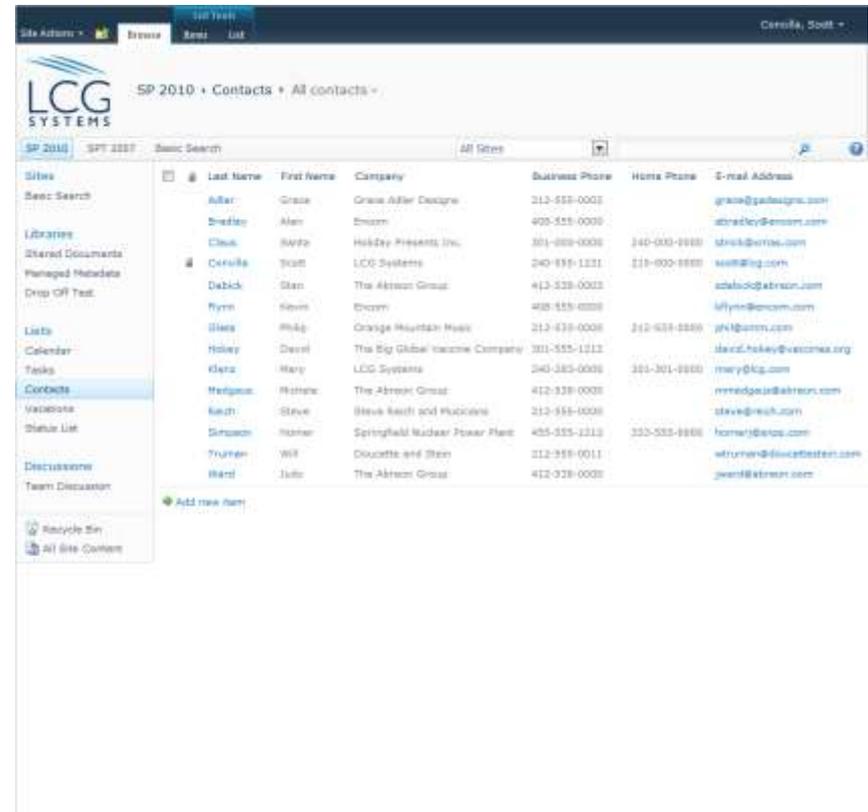
# Defining Lists

- A list is a collection of similar items.
  - Contact info
  - Calendar events
  - Inventory items
- Lists group items together for later retrieval or usage.



# Defining Lists

- SharePoint lists store data and information, **not files**.
- List data is organized into columns and rows like an Access table or Excel spreadsheet.



The screenshot shows a SharePoint 2010 interface for a 'Contacts' list. The list is displayed as a table with columns for Last Name, First Name, Company, Business Phone, Home Phone, and E-mail Address. The data is organized into rows, each representing a contact. The interface includes a navigation pane on the left with options like 'Basic Search', 'Libraries', 'Calendar', and 'Tasks'. The 'Contacts' list is currently selected and highlighted.

Last Name	First Name	Company	Business Phone	Home Phone	E-mail Address
Adler	Grace	Grace Adler Design	212-555-0001		grace@adlerdesign.com
Brecher	Alan	Encom	408-555-0000		abrecher@encom.com
Chou	Kevin	Hobday Presents Inc.	301-800-0000	340-000-9999	stuck@hobday.com
Corville	Scott	LCG Systems	240-899-1231	218-000-9999	scott@lsg.com
Dabick	Stan	The Alderson Group	412-555-0001		sdabick@alderson.com
Flynn	Kevin	Encom	408-555-0000		kflynn@encom.com
Giles	Mark	Orange Mountain News	212-638-0000	212-638-0000	mark@omn.com
Holley	David	The Big Global Income Company	301-555-1212		david.holley@vacomax.org
Kertz	Mary	LCG Systems	240-385-0000	301-301-9999	mary@lsg.com
Madigan	Matthew	The Alderson Group	412-555-0000		mrmadigan@alderson.com
Reich	Steve	Steve Reich and Musicians	212-555-0000		steve@reich.com
Simmons	Homer	Springfield Nuclear Power Plant	455-555-1212	333-555-9999	homer@snpp.com
Truman	Will	Doucette and Stein	212-338-0011		wtruman@doucettestein.com
Ward	Julie	The Alderson Group	412-028-0000		jward@alderson.com

# Built-in Lists

- SharePoint has many built-in list templates and types.
- The starred types can be connected or linked to Outlook.
- Built-in lists can be customized as needed.

Built-In Lists
Calendars *
Contacts *
Announcements
Tasks *
Links
Discussion Boards *
Issue Tracking
Surveys

# Custom Lists

- Custom lists can be created when there isn't a template that meets your needs.
  - Essentially, this is creating a list "from scratch".

Custom Lists
Grant Data
Science Data
Research Data
Web Usage Report
References List
Accomplishments
Registrations

# List Tasks and Permissions

## TASKS THAT CAN BE DONE BY ANYONE

- Viewing item details \*
- Sorting list data
- Filtering list data
- Changing the list view

## TASKS THAT MAY REQUIRE EXTRA PERMISSIONS

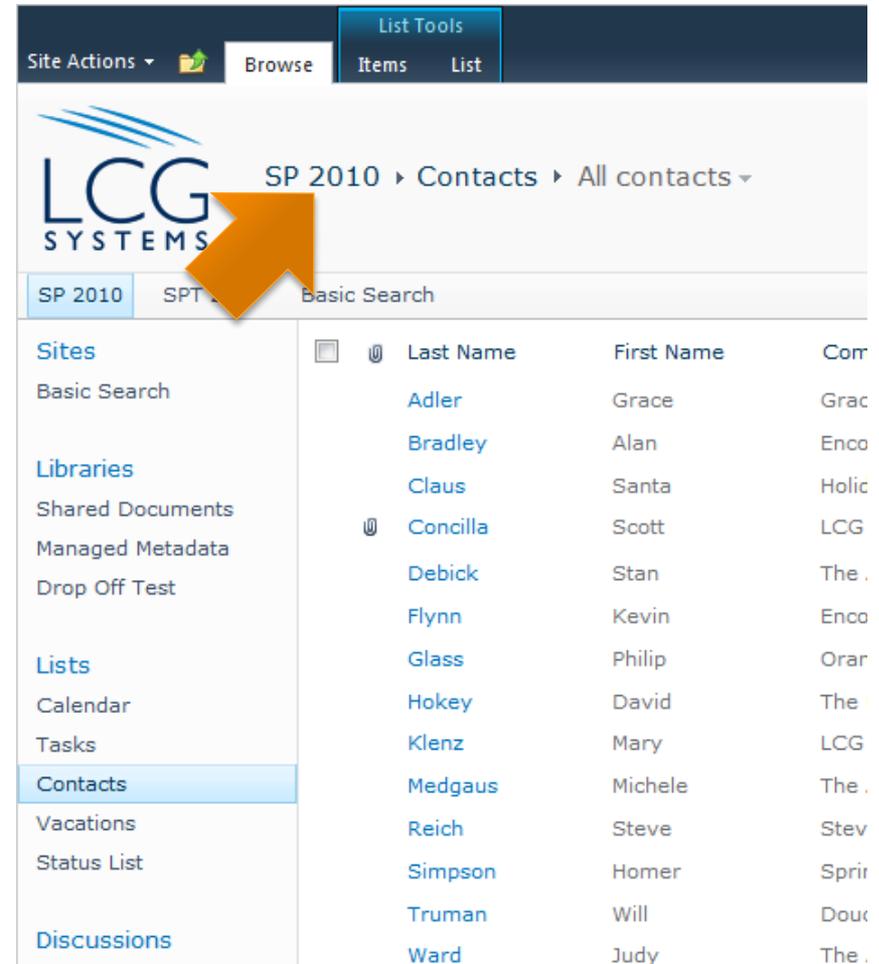
- Viewing item details \*
- Adding list items
- Modifying list items
- Deleting list items
- Creating views
- Adding or modifying list columns
- Changing list settings

# Navigating a List

- Using the Breadcrumb Trail
- Changing the List View
- Using the Folder Navigation Icon
- Viewing Additional Pages
- Using the Manage Views Group

# Using the Breadcrumb Trail

- The breadcrumb trail is a series of links found at the top of a list that displays the path of where you are.
- The links can be used to navigate up the list or site.

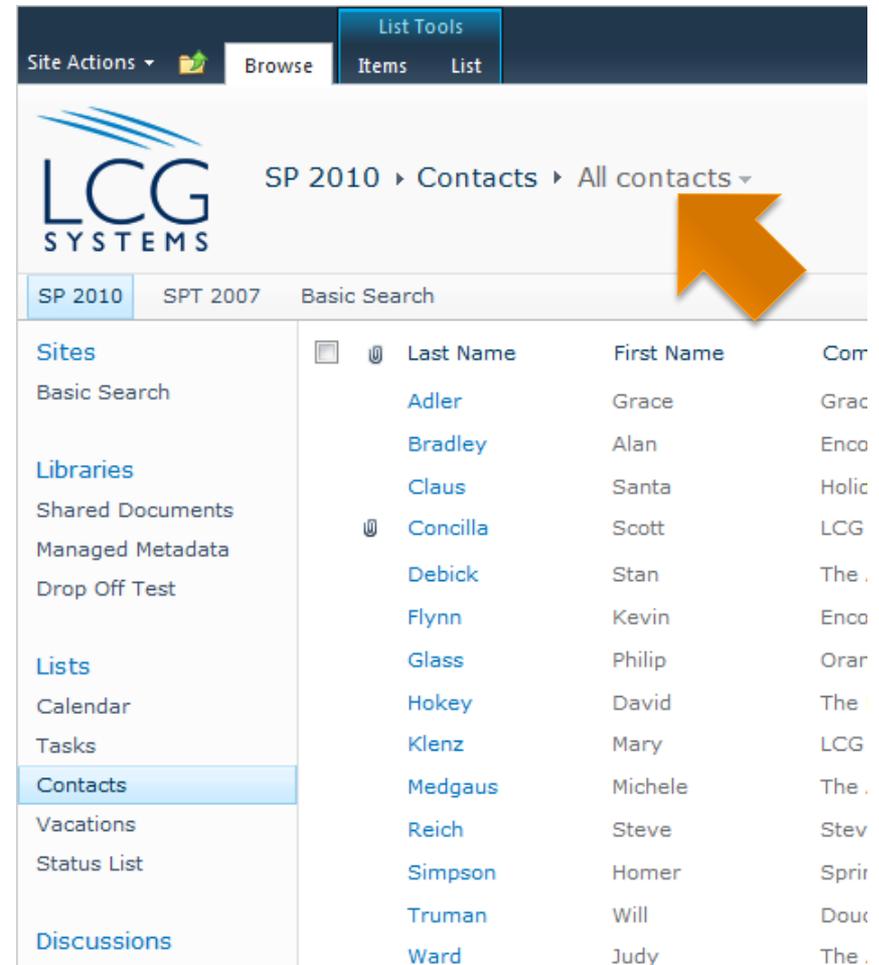


The screenshot shows a SharePoint interface. At the top, there is a navigation bar with 'Site Actions', 'Browse', and 'List Tools' (containing 'Items' and 'List'). Below this is the LCG SYSTEMS logo. The breadcrumb trail is 'SP 2010 > Contacts > All contacts'. An orange arrow points to the 'Contacts' link in the breadcrumb trail. Below the breadcrumb trail is a search bar with 'SP 2010' and 'SPT' tabs, and a 'Basic Search' button. On the left side, there is a navigation pane with sections: 'Sites' (Basic Search), 'Libraries' (Shared Documents, Managed Metadata, Drop Off Test), 'Lists' (Calendar, Tasks, **Contacts**, Vacations, Status List), and 'Discussions'. The main content area displays a table of contacts with columns: 'Last Name', 'First Name', and 'Com'.

Last Name	First Name	Com
Adler	Grace	Grac
Bradley	Alan	Enco
Claus	Santa	Holic
Concilla	Scott	LCG
Debick	Stan	The .
Flynn	Kevin	Enco
Glass	Philip	Orar
Hokey	David	The
Klenz	Mary	LCG
Medgaus	Michele	The .
Reich	Steve	Stev
Simpson	Homer	Sprir
Truman	Will	Douc
Ward	Judy	The .

# Changing the List View

- The last link of the breadcrumb trail changes the view of a list.
- A **View** is a group of settings that changes how the list items are displayed.

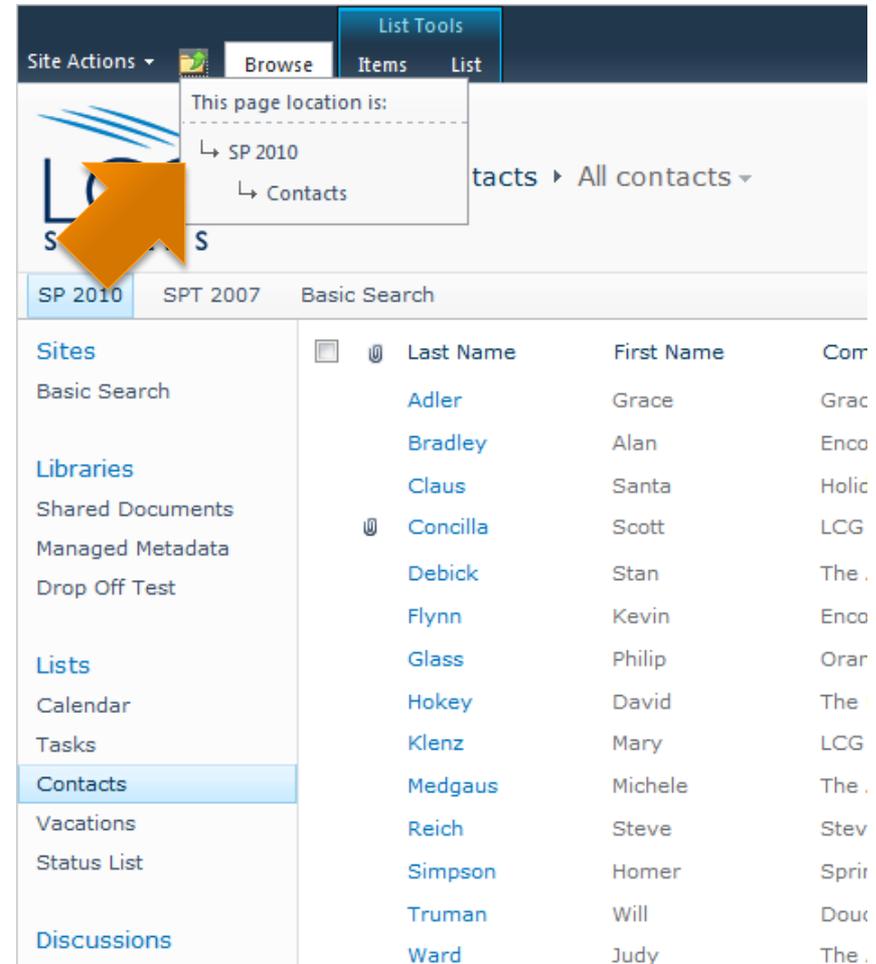


The screenshot shows a SharePoint interface for a list of contacts. The breadcrumb trail at the top right reads "SP 2010 > Contacts > All contacts". An orange arrow points to the "All contacts" link. Below the breadcrumb trail, there are tabs for "SP 2010" and "SPT 2007", and a "Basic Search" input field. The main content area displays a table of contacts with columns for "Last Name", "First Name", and "Com". The "Contacts" link in the left-hand navigation pane is highlighted.

Last Name	First Name	Com
Adler	Grace	Grac
Bradley	Alan	Enco
Claus	Santa	Holic
Concilla	Scott	LCG
Debick	Stan	The .
Flynn	Kevin	Enco
Glass	Philip	Orar
Hokey	David	The
Klenz	Mary	LCG
Medgaus	Michele	The .
Reich	Steve	Stev
Simpson	Homer	Sprir
Truman	Will	Douc
Ward	Judy	The .

# Using the Folder Navigation Icon

- The folder navigation icon also displays a series of links in a stepped format that can be used to navigate up a list or site.



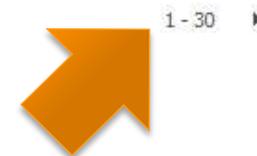
The screenshot shows a SharePoint interface. At the top, there is a 'List Tools' ribbon with 'Items' and 'List' tabs. Below the ribbon, a 'This page location is:' box shows a breadcrumb trail: 'SP 2010' > 'Contacts'. An orange arrow points to the folder navigation icon (a blue square with a white 'L' shape) in the top left corner. Below the breadcrumb, there are tabs for 'SP 2010', 'SPT 2007', and 'Basic Search'. The main content area is a table with columns for 'Last Name', 'First Name', and 'Com'. The table contains the following data:

Last Name	First Name	Com
Adler	Grace	Grac
Bradley	Alan	Enco
Claus	Santa	Holic
Concilla	Scott	LCG
Debick	Stan	The .
Flynn	Kevin	Enco
Glass	Philip	Orar
Hokey	David	The
Klenz	Mary	LCG
Medgaus	Michele	The .
Reich	Steve	Stev
Simpson	Homer	Sprir
Truman	Will	Douc
Ward	Judy	The .

# Viewing Additional Pages

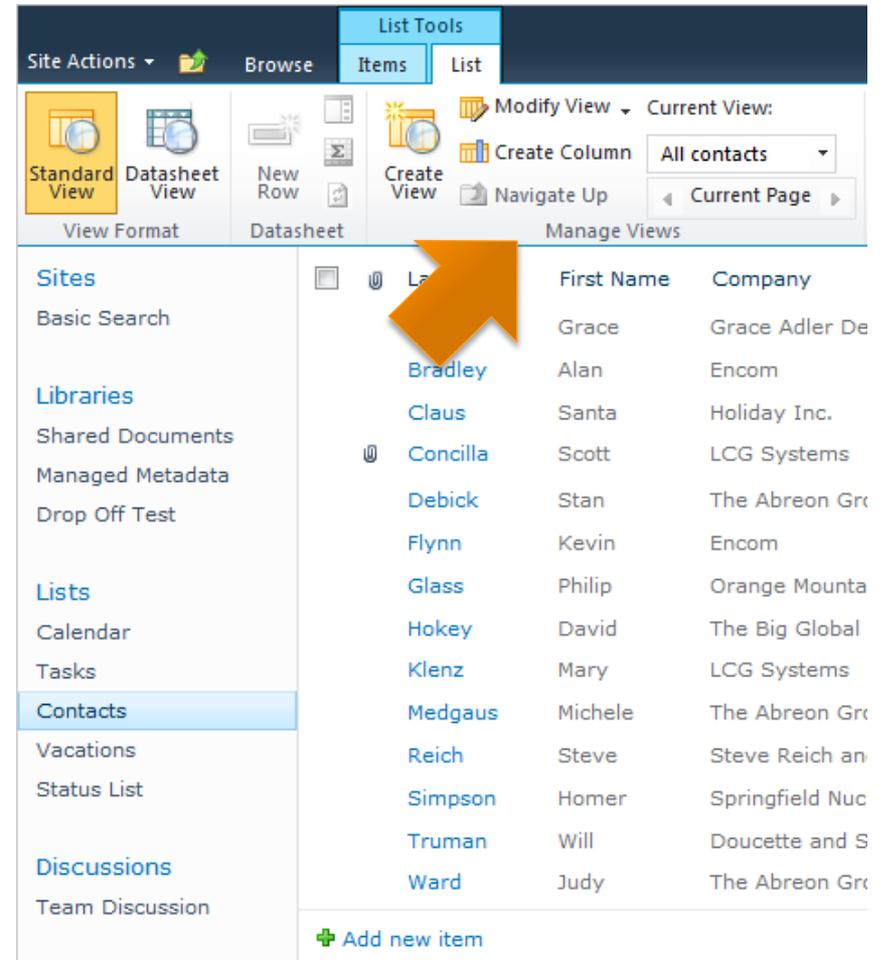
- If a list has more items than can be displayed on a single page, a simple control set will be displayed at the bottom to navigate the pages.

	ordinal dates <small>NEW</small>	9/8/2011 4:12 PM
	Outlander Cooking <small>NEW</small>	9/8/2011 4:13 PM
	PivotTables Basics - bank accounts	5/10/2011 4:44 PM
	PivotTables Basics - employee list	5/10/2011 4:44 PM
	PivotTables Basics - expenses	5/10/2011 4:44 PM
	PivotTables Basics - sales by date	5/10/2011 4:44 PM
	Products <small>NEW</small>	9/8/2011 4:13 PM
	Profit trends <small>NEW</small>	9/8/2011 4:13 PM
	Quarterly sales	5/10/2011 4:45 PM
	Repeat header	5/10/2011 4:45 PM
	Review <small>NEW</small>	9/8/2011 4:12 PM
	Revisions practice <small>NEW</small>	9/8/2011 4:12 PM
	Roles <small>NEW</small>	9/8/2011 4:12 PM
	Sales analysis <small>NEW</small>	9/8/2011 4:13 PM
	Sales chart <small>NEW</small>	9/8/2011 4:13 PM
	Second reviewer <small>NEW</small>	9/8/2011 4:12 PM
	Sorting	5/10/2011 4:45 PM



# Using the Manage Views Group

- The **Manage Views** group on the **List** tab can be used to change the current view AND navigate pages of items.



The screenshot shows the SharePoint interface for a list. The ribbon is set to the 'List' tab, and the 'Manage Views' group is highlighted. An orange arrow points to the 'Manage Views' group. The ribbon includes options for 'Standard View', 'Datasheet View', 'New Row', 'Create View', 'Modify View', 'Create Column', and 'Navigate Up'. The 'Current View' dropdown is set to 'All contacts', and the 'Current Page' is 1. The list view shows a table of contacts with columns for 'First Name' and 'Company'.

First Name	Company
Grace	Grace Adler De
Bradley	Alan Encom
Claus	Santa Holiday Inc.
Concilla	Scott LCG Systems
Debick	Stan The Abreon Gr
Flynn	Kevin Encom
Glass	Philip Orange Mounta
Hokey	David The Big Global
Klenz	Mary LCG Systems
Medgaus	Michele The Abreon Gr
Reich	Steve Steve Reich an
Simpson	Homer Springfield Nuc
Truman	Will Doucette and S
Ward	Judy The Abreon Gr

# Working with List Items

- Viewing a List Item's Details
- Sorting List Items
- Filtering List Items
- Selecting Multiple List Items
- Creating New List Items
- Editing List Items
- Using Inline Editing
- Deleting List Items
- Restoring List Items

# Viewing a List Item's Details

- Most lists have more details or columns than can be displayed in the initial view of the list.
- Open a list item to view all of its details or properties.

Contacts - Concilla

View Custom Commands

Edit Item Version History Alert Me  
Manage Permissions  
Delete Item  
Manage Actions

Last Name	Concilla
First Name	Scott
Full Name	Scott A. Concilla
E-mail Address	<a href="mailto:scott@lcg.com">scott@lcg.com</a>
Company	LCG Systems
Job Title	Technical Trainer
Business Phone	240-000-0000
Home Phone	215-000-0000
Mobile Number	267-000-0000
Fax Number	
Address	6000 Executive Blvd. Suite 410
City	Rockville
State/Province	MD
ZIP/Postal Code	20852
Country/Region	USA
Web Page	
Notes	
Attachments	<a href="#">Meeting Agenda 2011-07-07.docx</a> <a href="#">Action plan for project.docx</a>

Created at 5/4/2011 4:39 PM by Concilla, Scott  
Last modified at 11/8/2011 12:30 PM by Concilla, Scott

Close

# Viewing a List Item's Details



## Procedure

1. Click the field of the list item that is a link.
2. The list item details are displayed in a dialog box.
3. Click the **Close** button or the **[X]** to close the dialog box.

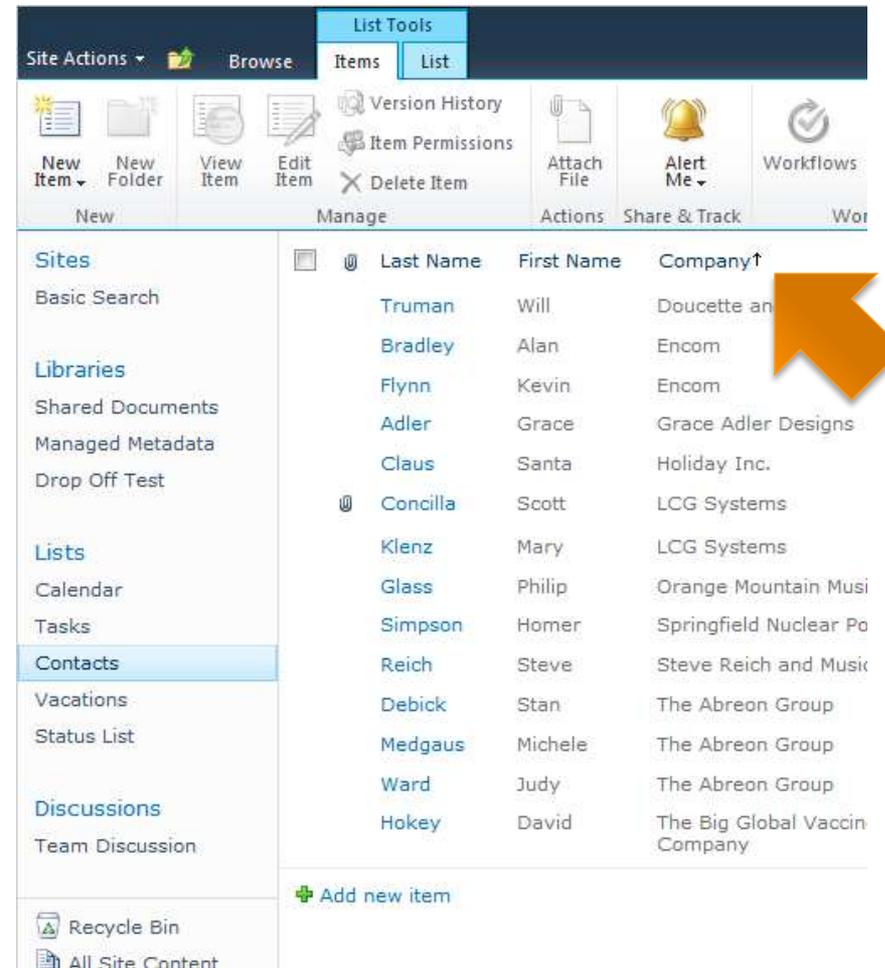
The screenshot shows a SharePoint interface for a list titled 'All contacts' under the 'Contacts' list. The breadcrumb path is 'SP 2010 > Contacts > All contacts'. The table displays the following data:

SP 2010	SPT 2007	Basic Search	Last Name	First Name	Company
			Adler	Grace	Grace Adler De
			Bradley	Alan	Encom
			Claus	Santa	Holiday Inc.
			<b>Concilla</b>	Scott	LCG Systems
			Debick	Stan	The Abreon Gr
			Flynn	Kevin	Encom
			Glass	Philip	Orange Mounta
			Hokey	David	The Big Global
			Klenz	Mary	LCG Systems
			Medgaus	Michele	The Abreon Gr
			Reich	Steve	Steve Reich an
			Simpson	Homer	Springfield Nuc
			Truman	Will	Doucette and S
			Ward	Judy	The Abreon Gr

A large orange arrow points to the 'Concilla' row, which is highlighted in blue. The 'List Tools' menu is visible at the top right, with 'Items' and 'List' options.

# Sorting List Items

- List items can be sorted by almost any column in the list.
  - Some column types are “unsortable”.
- When sorting manually, a tiny arrow will appear next to a sorted column.

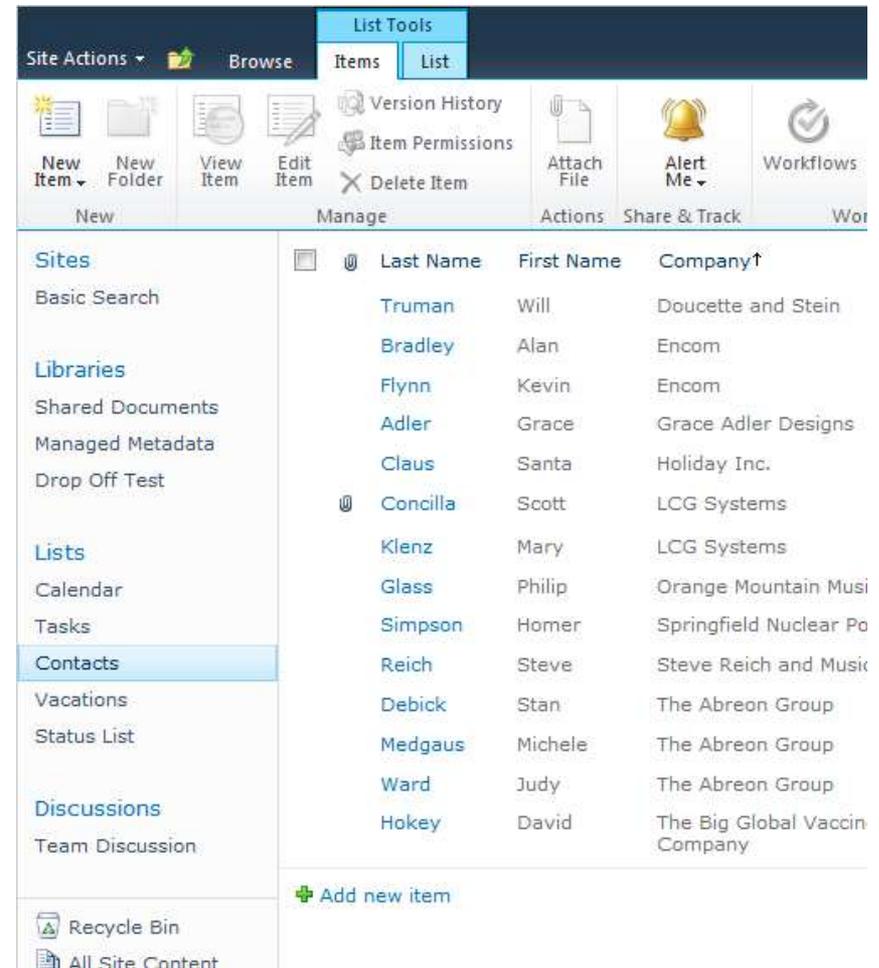


The screenshot shows the SharePoint interface for a list. The top navigation bar includes 'Site Actions', 'Browse', and 'List Tools'. The 'List Tools' bar contains options like 'New Item', 'New Folder', 'View Item', 'Edit Item', 'Delete Item', 'Version History', 'Item Permissions', 'Attach File', 'Alert Me', and 'Workflows'. The left sidebar shows navigation options like 'Basic Search', 'Libraries', 'Lists', 'Contacts', 'Discussions', and 'Recycle Bin'. The main content area displays a table of contacts sorted by last name. A small arrow is visible next to the 'Last Name' header.

Last Name	First Name	Company
Truman	Will	Doucette an
Bradley	Alan	Encom
Flynn	Kevin	Encom
Adler	Grace	Grace Adler Designs
Claus	Santa	Holiday Inc.
Concilla	Scott	LCG Systems
Klenz	Mary	LCG Systems
Glass	Philip	Orange Mountain Musi
Simpson	Homer	Springfield Nuclear Po
Reich	Steve	Steve Reich and Musi
Debick	Stan	The Abreon Group
Medgaus	Michele	The Abreon Group
Ward	Judy	The Abreon Group
Hokey	David	The Big Global Vaccin Company

# Sorting List Items

- The initial sort of a list is determined by the default view of the list.
- Views are required to do the following:
  - Sorting by more than one column.
  - Sorting by a non-visible column.



The screenshot shows a SharePoint interface with a list of contacts. The 'List Tools' ribbon is active, showing options like 'New Item', 'New Folder', 'View Item', 'Edit Item', 'Delete Item', 'Version History', 'Item Permissions', 'Attach File', 'Alert Me', and 'Workflows'. The list is sorted by 'Last Name' and contains the following items:

	Last Name	First Name	Company†
	Truman	Will	Doucette and Stein
	Bradley	Alan	Encom
	Flynn	Kevin	Encom
	Adler	Grace	Grace Adler Designs
	Claus	Santa	Holiday Inc.
	Concilla	Scott	LCG Systems
	Klenz	Mary	LCG Systems
	Glass	Philip	Orange Mountain Musi
	Simpson	Homer	Springfield Nuclear Po
	Reich	Steve	Steve Reich and Musi
	Debick	Stan	The Abreon Group
	Medgaus	Michele	The Abreon Group
	Ward	Judy	The Abreon Group
	Hokey	David	The Big Global Vaccin Company

At the bottom of the list, there is a '+ Add new item' button.

# Sorting List Items



## Procedure

1. Click a column heading to sort by that column. Click the column heading again to reverse the sort.

OR

2. Click the column heading drop-down menu and choose the desired sort order.

The screenshot shows a SharePoint list interface. The top navigation bar includes 'Site Actions', 'Browse', and 'List Tools'. The 'List Tools' section has tabs for 'Items' and 'List'. Below this are various action buttons: 'New Item', 'New Folder', 'View Item', 'Edit Item', 'Delete Item', 'Version History', 'Item Permissions', 'Attach File', 'Alert Me', and 'Workflows Approve'. The main content area shows a list of items with columns for 'Last Name', 'First Name', and 'Company'. The 'Company' column has a dropdown menu open, showing sorting options: 'A on Top', 'Z on Top', and 'Clear Filter from Company'. An orange arrow points to the dropdown menu.

Last Name	First Name	Company
Truman	A on Top	
Bradley	Z on Top	
Flynn		
Adler		
Claus		
Concilla		
Klenz		
Glass		
Simpson		
Reich	Judy	The Abreon Group
Debick	David	The Big Global Vaccine Company
Medgaus		
Ward		
Hokey		

# Filtering List Items

- Filters are used to display a selected group of list items.
- The choices in the filter list are auto-populated by SharePoint.
- Filters work best on columns with repeated or similar values.

The screenshot shows a SharePoint interface for a list named 'Contacts'. The breadcrumb path is 'SP 2010 > Contacts > All contacts'. The list has columns for 'Last Name', 'First Name', and 'Company'. Two items are displayed: 'Concilla' (Scott, LCG Systems) and 'Klenz' (Mary, LCG Systems). The 'List Tools' menu is open, showing 'Items' and 'List' options. The left sidebar shows the 'Contacts' list selected under the 'Lists' section.

	Last Name	First Name	Company
<input type="checkbox"/>	Concilla	Scott	LCG Systems
<input type="checkbox"/>	Klenz	Mary	LCG Systems

# Filtering List Items



## Procedure

1. To create a filter, click the drop-down menu of a column heading.
2. Select a choice from the menu.
3. The list displays items that match the filter.
4. A filter icon is also displayed next to the column.

The screenshot shows the SharePoint interface with the 'List Tools' ribbon active. The 'List' tab is selected, and the 'Company' column heading in the list has a filter icon (a funnel) and a dropdown arrow. The dropdown menu is open, showing filtering options: 'A on Top', 'Z on Top', 'Clear Filter from Company', and a list of company names. The 'LCG Systems' item is selected in the dropdown menu, indicated by a blue checkmark and an orange arrow pointing to it. The list below shows the filtered results, with 'Concilla' and 'Klenz' visible under the 'Last Name' column.

Site Actions	Items	List
New Item	View Item	Version History
New Folder	Edit Item	Item Permissions
	Delete Item	Attach File
		Alert Me
		Workflows Approv
New	Manage	Actions
		Share & Track
		Workflows
Sites	Last Name	First Name
Basic Search	Concilla	Company
Libraries	Klenz	
Shared Documents		
Managed Metadata		
Drop Off Test		
Lists		
Calendar		
Tasks		
Contacts		
Vacations		
Status List		
Discussions		
Team Discussion		
Recycle Bin		
All Site Content		

# Removing a Column Filter



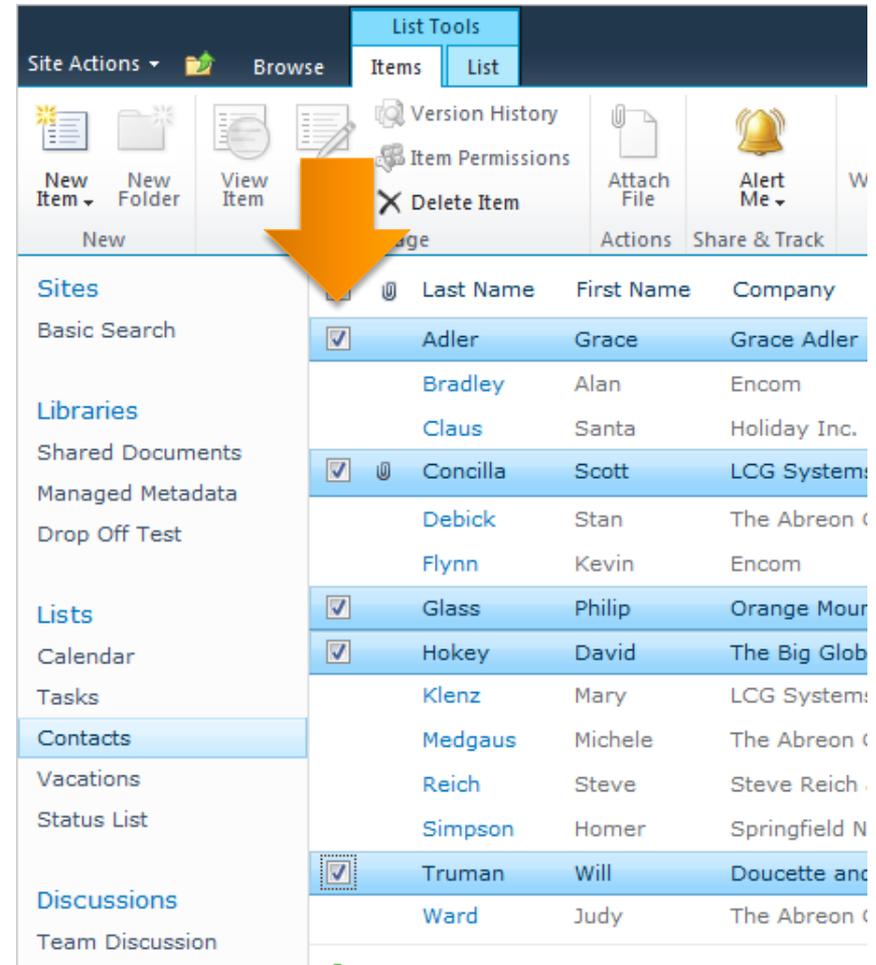
## Procedure

1. To remove a filter from a column, click the drop-down menu of the column heading where the filter icon is displayed.
2. Select **Clear Filter** from *<columnname>*.

The screenshot shows a SharePoint interface for a list titled 'SP 2010 > Contacts > All contacts'. The 'Company' column is filtered to show 'LCG Systems'. A dropdown menu is open for the 'Company' column heading, showing sorting options (A on Top, Z on Top) and a 'Clear Filter from Company' option, which is highlighted by an orange arrow. The list view includes a left-hand navigation pane with categories like Sites, Libraries, Lists, and Discussions.

# Selecting Multiple List Items

- Selection checkboxes allow a user to select multiple list items and perform a single action.

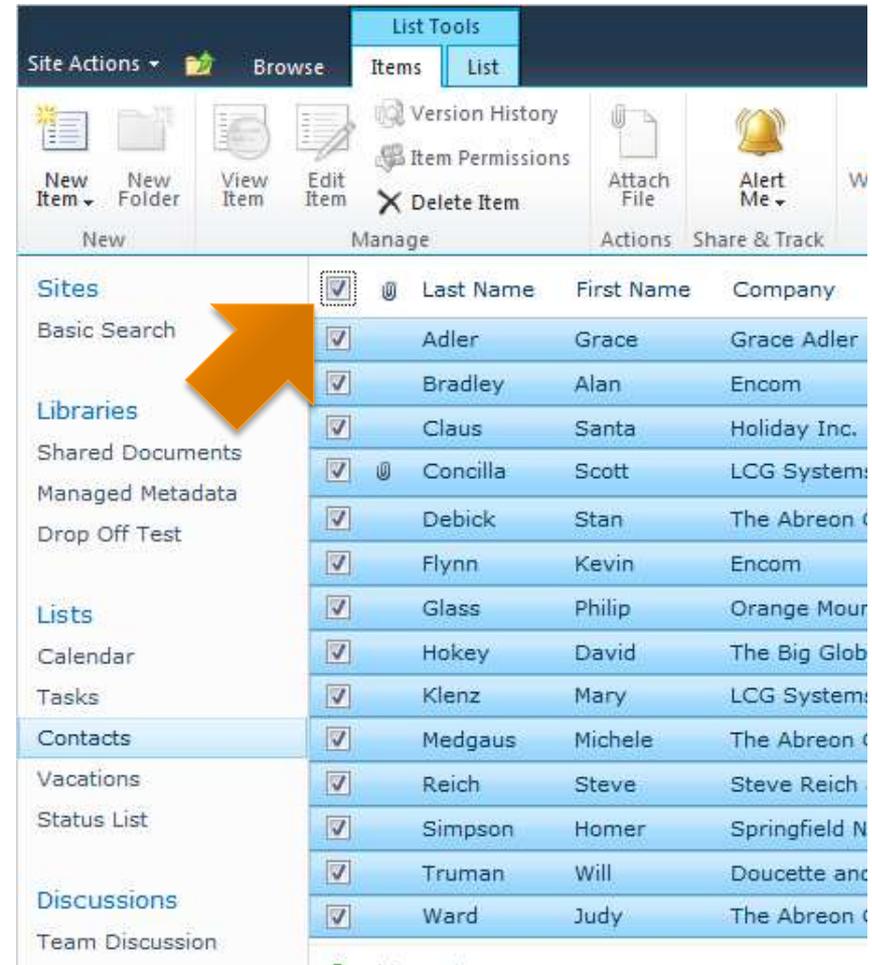


The screenshot displays a SharePoint list interface. The top navigation bar includes 'Site Actions' and 'Browse'. The 'List Tools' tab is active, showing options like 'New Item', 'New Folder', 'View Item', 'Delete Item', 'Attach File', and 'Alert Me'. The list table has columns for 'Last Name', 'First Name', and 'Company'. Several rows are highlighted in blue, indicating they are selected. An orange arrow points to the 'List Tools' tab.

	Last Name	First Name	Company
<input checked="" type="checkbox"/>	Adler	Grace	Grace Adler
	Bradley	Alan	Encom
	Claus	Santa	Holiday Inc.
<input checked="" type="checkbox"/>	Concilla	Scott	LCG Systems
	Debick	Stan	The Abreon C
	Flynn	Kevin	Encom
<input checked="" type="checkbox"/>	Glass	Philip	Orange Mour
<input checked="" type="checkbox"/>	Hokey	David	The Big Glob
	Klenz	Mary	LCG Systems
	Medgaus	Michele	The Abreon C
	Reich	Steve	Steve Reich
	Simpson	Homer	Springfield N
<input checked="" type="checkbox"/>	Truman	Will	Doucette and
	Ward	Judy	The Abreon C

# Selecting Multiple List Items

- Use the top selection checkbox to select (or deselect) all list items.



The screenshot shows the SharePoint interface for a list. The top navigation bar includes 'Site Actions' and 'List Tools'. The 'List Tools' tab is active, showing options like 'New Item', 'New Folder', 'View Item', 'Edit Item', 'Delete Item', 'Attach File', and 'Alert Me'. The main content area displays a table of items with columns for 'Last Name', 'First Name', and 'Company'. A top selection checkbox is highlighted with an orange arrow.

	<input checked="" type="checkbox"/>	Last Name	First Name	Company
Basic Search	<input checked="" type="checkbox"/>	Adler	Grace	Grace Adler
	<input checked="" type="checkbox"/>	Bradley	Alan	Encom
	<input checked="" type="checkbox"/>	Claus	Santa	Holiday Inc.
	<input checked="" type="checkbox"/>	Concilla	Scott	LCG Systems
	<input checked="" type="checkbox"/>	Debick	Stan	The Abreon
	<input checked="" type="checkbox"/>	Flynn	Kevin	Encom
	<input checked="" type="checkbox"/>	Glass	Philip	Orange Mour
	<input checked="" type="checkbox"/>	Hokey	David	The Big Glob
	<input checked="" type="checkbox"/>	Klenz	Mary	LCG Systems
	<input checked="" type="checkbox"/>	Medgaus	Michele	The Abreon
	<input checked="" type="checkbox"/>	Reich	Steve	Steve Reich
	<input checked="" type="checkbox"/>	Simpson	Homer	Springfield N
	<input checked="" type="checkbox"/>	Truman	Will	Doucette and
	<input checked="" type="checkbox"/>	Ward	Judy	The Abreon

# Selecting a Single List Item

- The selection checkboxes can also be used to select a single item and use an action button on the ribbon.
- This is an alternative to using the drop-down menu of an item.

The screenshot shows the SharePoint interface for a list. The ribbon is set to 'List Tools' with the 'List' tab selected. The ribbon includes sections for 'New' (New Item, New Folder), 'Manage' (View Item, Edit Item, Version History, Item Permissions, Delete Item), 'Actions' (Attach File), and 'Share & Track' (Alert Me). The left sidebar shows navigation options: Sites, Libraries, Lists, Contacts (selected), Vacations, Status List, Discussions, and Team Discussion. The main content area displays a table of contacts with columns for Last Name, First Name, and Company. The 'Flynn' row is highlighted, and a large orange arrow points to the selection checkbox in the first column of this row.

	Last Name	First Name	Company
<input type="checkbox"/>	Adler	Grace	Grace Adler
<input type="checkbox"/>	Bradley	Alan	Encom
<input type="checkbox"/>	Claus	Santa	Holiday Inc.
<input type="checkbox"/>	Concilla	Scott	LCG System:
<input type="checkbox"/>	Debick	Stan	The Abreon (
<input checked="" type="checkbox"/>	Flynn	Kevin	Encom
<input type="checkbox"/>	Glass	Philip	Orange Mour
<input type="checkbox"/>	Hokey	David	The Big Glob
<input type="checkbox"/>	Klenz	Mary	LCG System:
<input type="checkbox"/>	Medgaus	Michele	The Abreon (
<input type="checkbox"/>	Reich	Steve	Steve Reich
<input type="checkbox"/>	Simpson	Homer	Springfield N
<input type="checkbox"/>	Truman	Will	Doucette anc
<input type="checkbox"/>	Ward	Judy	The Abreon (

# Creating New List Items

- Users with the correct permissions can create new list items.
- When creating a list item, required fields will be marked with a red asterisk (\*).



# Creating New List Items



## Procedure

1. On the **Items** tab, in the **New** group, click the **New Item** button.  
OR  
Click **+Add new item** at the bottom.
2. Enter the list item information.
3. Click either **Save** button when finished.

The screenshot shows the SharePoint interface for a list. The 'List Tools' ribbon is active, with the 'Items' tab selected. The 'New Item' button in the 'New' group is highlighted with an orange arrow. The list view below shows a table of contacts with columns for Last Name, First Name, and Company. At the bottom of the list view, the '+ Add new item' button is also highlighted with an orange arrow.

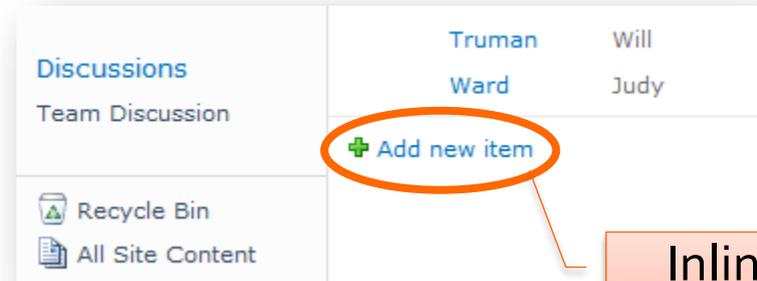
Last Name	First Name	Company
Adler	Grace	Grace Adler De
Bradley	Alan	Encom
Claus	Santa	Holiday Inc.
Concilla	Scott	LCG Systems
Debick	Stan	The Abreon Gro
Flynn	Kevin	Encom
Glass	Philip	Orange Mountai
Hokey	David	The Big Global \
Klenz	Mary	LCG Systems
Medgaus	Michele	The Abreon Gro
Reich	Steve	Steve Reich anc
Simpson	Homer	Springfield Nucl
Truman	Will	Doucette and Si
Ward	Judy	The Abreon Gro

# Creating New List Items

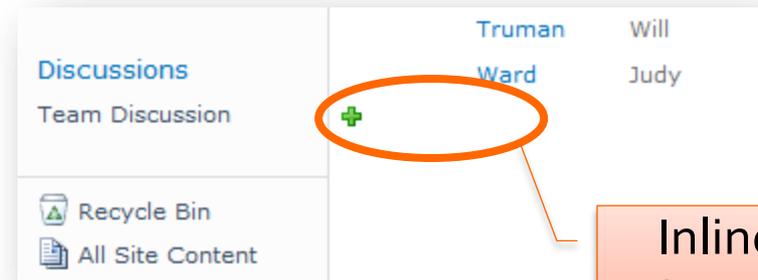


## CAUTION!!

- If inline editing is enabled for a list view (more on this topic in a moment), the **+Add new item** link will only display a green plus sign and will NOT launch a dialog box.



Inline editing is OFF



Inline editing is ON

# Editing List Items

- Existing list items can be edited or modified as necessary.
- Only users with the correct permissions can edit list items.



# Editing List Items



## Procedure (Method 1)

1. Click the drop-down menu of the list item and choose **Edit Item**.
2. Make changes or edits as desired.
3. Click either **Save** button when finished.

The screenshot shows the SharePoint interface with the 'List Tools' ribbon selected. The ribbon has two tabs: 'Items' and 'List'. The 'List' tab is active, showing options like 'Version History', 'Item Permissions', and 'Delete Item'. Below the ribbon, there is a list of items. The item 'Concilla' is selected, and a context menu is open over it. The context menu options are: 'View Item', 'Edit Item', 'Export Contact', 'Compliance Details', 'Alert Me', 'Manage Permissions', and 'Delete Item'. A mouse cursor is pointing at the 'Edit Item' option.

Site Actions	Items	List
New Item	New Folder	View Item
		Edit Item
		Delete Item
		Attach File

Sites	Last Name	First Name
Basic Search	Adler	Grace
	Bradley	Alan
	Claus	Santa
	Concilla	Scott
		Stan
		Kevin
		Philip
		David
		Mary
		Michele
	Reich	Steve

# Editing List Items



## Procedure (Method 2)

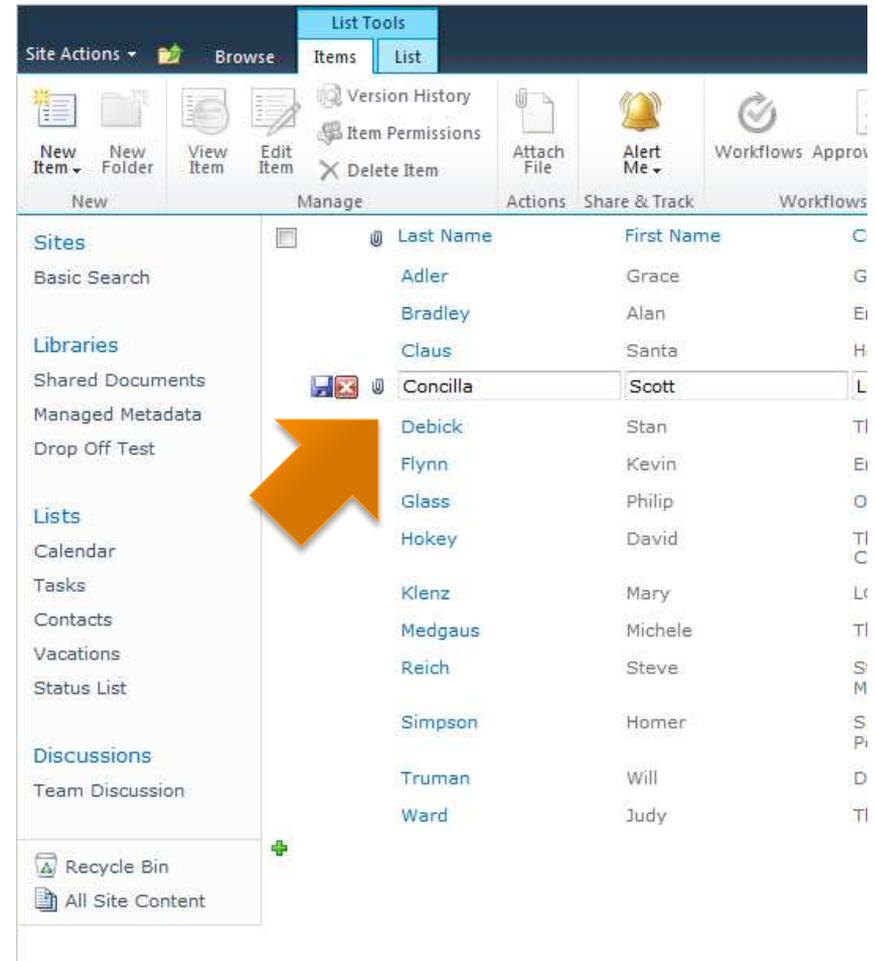
1. Select the checkbox of the item.
2. On the **Items** tab, in the **Manage** group, click the **Edit Item** button.
3. Make changes or edits as desired.
4. Click either **Save** button when finished.

The screenshot shows the SharePoint interface with the 'List Tools' ribbon active. The 'Items' tab is selected, and the 'Edit Item' button in the 'Manage' group is highlighted with a large orange arrow. The 'List Tools' ribbon also shows the 'List' tab selected. The main content area displays a list of items with columns for 'Last Name' and 'First Name'. The item 'Concilla Scott' is selected, and its checkbox is checked.

	Last Name	First Name
<input type="checkbox"/>	Adler	Grace
<input type="checkbox"/>	Bradley	Alan
<input type="checkbox"/>	Claus	Santa
<input checked="" type="checkbox"/>	Concilla	Scott
<input type="checkbox"/>	Debick	Stan
<input type="checkbox"/>	Flynn	Kevin
<input type="checkbox"/>	Glass	Philip
<input type="checkbox"/>	Hokey	David
<input type="checkbox"/>	Klenz	Mary
<input type="checkbox"/>	Medgaus	Michele
<input type="checkbox"/>	Reich	Steve

# Using Inline Editing

- **Inline editing** allows a user to add new list items and to edit current list items without having to launch a dialog box.

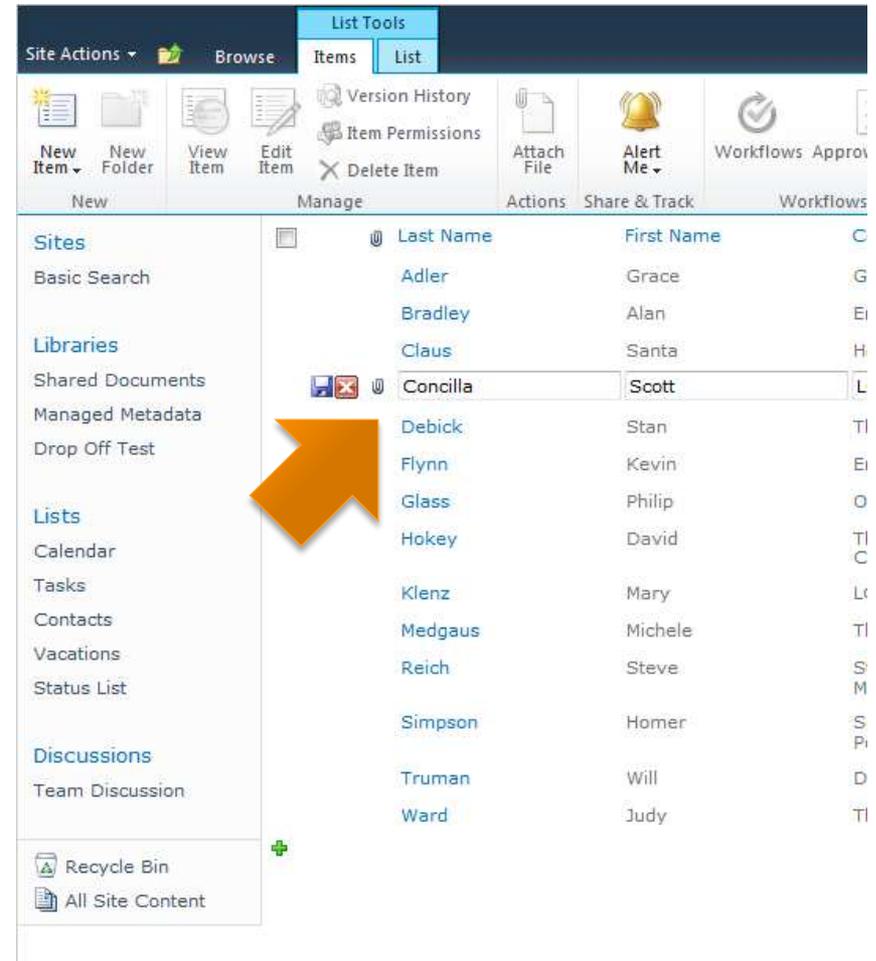


The screenshot displays the SharePoint interface for a list. The top navigation bar includes 'Site Actions' and 'Browse'. The 'List Tools' ribbon is active, showing 'Items' and 'List' tabs. The 'Items' tab contains icons for 'New Item', 'New Folder', 'View Item', and 'Edit Item'. The 'List' tab contains icons for 'Version History', 'Item Permissions', 'Delete Item', 'Attach File', 'Alert Me', and 'Workflows Approv'. The main content area shows a list of items with columns for 'Last Name' and 'First Name'. The item 'Concilla' is selected, and an orange arrow points to the 'Edit Item' icon in the ribbon, indicating the inline editing process.

Last Name	First Name	
Adler	Grace	G
Bradley	Alan	Ei
Claus	Santa	H
Concilla	Scott	L
Debick	Stan	TI
Flynn	Kevin	Ei
Glass	Philip	O
Hokey	David	TI C
Klenz	Mary	Lo
Medgaus	Michele	TI
Reich	Steve	S M
Simpson	Homer	S Pi
Truman	Will	D
Ward	Judy	TI

# Using Inline Editing

- Inline editing will only allow you to work with columns that are currently visible in the view.
- This option must be enabled for a view by the list owner.



The screenshot displays a SharePoint list view with a table of items. The 'List Tools' ribbon is active, showing the 'List' tab. The table has columns for 'Last Name' and 'First Name'. The 'Concilla' item is selected, and an orange arrow points to the 'Concilla' text in the 'Last Name' column, which is currently in an inline editing state. The table data is as follows:

Last Name	First Name	
Adler	Grace	G
Bradley	Alan	Ei
Claus	Santa	H
Concilla	Scott	L
Debick	Stan	TI
Flynn	Kevin	Ei
Glass	Philip	O
Hokey	David	TI C
Klenz	Mary	LI
Medgaus	Michele	TI
Reich	Steve	S M
Simpson	Homer	S PI
Truman	Will	D
Ward	Judy	TI

# Using Inline Editing



## Procedure

1. Click the inline edit icon next to the list item you wish to edit.
2. Make changes to the visible fields.
3. Click the disk icon next to the list item to save changes or click the **X** to cancel.

The screenshot shows the SharePoint interface for a list. The 'List Tools' ribbon is active, and the 'Edit Item' icon is highlighted with an orange arrow. The list contains the following data:

	Last Name	First Name	Company
Basic Search	Adler	Grace	Grace Adler Designs
	Bradley	Alan	Encom
	Claus	Santa	Holiday Inc.
	Concilla	Scott	LCG Systems
	Debick	Stan	The Abreon Group
	Flynn	Kevin	Encom
	Glass	Philip	Orange Mountain Music
	Hokey	David	The Big Global Vaccine Comp
	Klenz	Mary	LCG Systems
	Medgaus	Michele	The Abreon Group
	Reich	Steve	Steve Reich and Musicians
	Simpson	Homer	Springfield Nuclear Power Pla
	Truman	Will	Doucette and Stein
	Ward	Judy	The Abreon Group

# Deleting List Items

- List items can be deleted.
- Deleted items are moved to the site Recycle Bin.
- Each site has its own Recycle Bin.



**If you need it, don't delete it!**

# Deleting List Items

- You will only see the items that you personally have deleted in the site Recycle Bin.
- Must have appropriate permissions to delete.



**If you need it, don't delete it!**

# Deleting List Items



## Procedure

1. Click the drop-down menu of the list item and choose **Delete Item**.
2. Click **OK** to confirm.

The screenshot displays the SharePoint interface. At the top, there is a ribbon with 'List Tools' selected, showing 'Items' and 'List' tabs. Below the ribbon, there are icons for 'New Item', 'New Folder', 'View Item', 'Edit Item', 'Delete Item', 'Attach File', and 'Alert Me'. The main content area shows a list of items with columns for 'Last Name', 'First Name', and 'Com'. The item 'Concilla' is selected, and a context menu is open over it, showing options like 'View Item', 'Edit Item', 'Export Contact', 'Compliance Details', 'Alert Me', 'Manage Permissions', and 'Delete Item'. A mouse cursor is pointing at the 'Delete Item' option.

Sites	Last Name	First Name	Com
Basic Search	Adler	Grace	Grac
	Bradley	Alan	Enco
	Claus	Santa	Holic
	Concilla	Scott	LCG
		Stan	The .
		Kevin	Enco
		Philip	Orar
		David	The
		Mary	LCG
		Michele	The .
		Steve	Stev
	Simpson	Homer	Sprir

# Restoring List Items

- Deleted items can be restored to their original locations.
- Each site has its own Recycle Bin.



**If you need it, don't delete it!**

# Restoring List Items

- Length of time an item stays in the Recycle Bin is configured by a server administrator.
  - This is a server-wide setting, not an individual site setting.



**If you need it, don't delete it!**

# Restoring List Items



## Procedure

1. On the Quick Launch menu, click the site **Recycle Bin** link.
2. Select the checkboxes of the items you wish to restore.
3. Click **Restore Selection** to restore the items.

SP 2010 - Recycle Bin

Use this page to restore items that you have deleted from this site or to empty deleted items. Items that were deleted more than 30 day(s) ago will be automatically emptied. To manage deleted items for the entire Site Collection go to the Site Collection Recycle Bin.

SP 2010 SPT 2007 Basic Search All Sites

Restore Selection X Delete Selection

Type	Name	Original Location	Created By	Deleted	Size
Library Item	Lewis	/Lists/Contacts	Training, Student14	11/4/2011 2:09 PM	< 1 KB
Library Item	Smith	/Lists/Contacts	Training, Student06	11/4/2011 2:09 PM	< 1 KB
Library Item	Doe	/Lists/Contacts	Training, Student08	11/4/2011 2:08 PM	< 1 KB
Library Item	Gomez	/Lists/Contacts	Training, Student10	11/4/2011 2:08 PM	< 1 KB
Library Item	Jones	/Lists/Contacts	Training, Student14	11/4/2011 2:08 PM	< 1 KB
Library Item	Thompson	/Lists/Contacts	Training, Student05	11/4/2011 2:08 PM	< 1 KB
Library Item	Williams	/Lists/Contacts	Training, Student01	11/4/2011 2:08 PM	< 1 KB
Library Item	Dandy	/Lists/Contacts	Training, Student05	11/4/2011 2:08 PM	< 1 KB
Library Item	Dickerson	/Lists/Contacts	Training, Student01	11/4/2011 2:08 PM	< 1 KB
Library Item	Tolliver	/Lists/Contacts	Training, Student11	11/4/2011 2:08 PM	< 1 KB
Library Item	Cakeo	/Lists/Contacts	Training, Student04	11/4/2011 2:07 PM	< 1 KB
Library Item	Cassidy	/Lists/Contacts	Training, Student13	11/4/2011 2:07 PM	< 1 KB
Library Item	Ducky	/Lists/Contacts	Training, Student04	11/4/2011 2:07 PM	< 1 KB
Library Item	Hugankie	/Lists/Contacts	Training, Student07	11/4/2011 2:07 PM	< 1 KB
Library Item	Horater	/Lists/Contacts	Training, Student03	11/4/2011 2:07 PM	< 1 KB
Library Item	O'Hara	/Lists/Contacts	Training, Student12	11/4/2011 2:07 PM	< 1 KB
Library Item	O'Hara	/Lists/Contacts	Training, Student04	11/4/2011 2:07 PM	< 1 KB
Library Item	Ovachkin	/Lists/Contacts	Training, Student05	11/4/2011 2:07 PM	< 1 KB

# Working with Attachments

- Attachments and List Items
- Adding an Attachment to a List Item
- Opening an Attachment in a List Item
- Deleting an Attachment from a List Item

# Attachments and List Items

- Some list types have a column type that allows you to add an attachment to the list item.
- Like an e-mail, you need to view the list item details to see and open the attachment.



# Attachments and List Items

- The attachment column type supports multiple attachments.
- Attachments still follow overall SharePoint restrictions on file types that can be uploaded/attached.



# Adding an Attachment



## Procedure

1. Open the list item in edit mode.
2. On the **Edit** tab in the **Actions** group, click the **Attach File** button.
3. Click **Browse** to select a file to attach.
4. Click **OK** when finished.

Contacts - Concilla

Edit

Save Cancel Paste Copy Delete Item Attach File Spelling

Commit Clipboard Actions

Last Name *	Concilla
First Name	Scott
Full Name	Scott A. Concilla
E-mail Address	scott@lcg.com
Company	LCG Systems
Job Title	Technical Trainer
Business Phone	240-555-1231
Home Phone	215-000-0000
Mobile Number	267-000-0000

# Opening an Attachment



## Procedure

1. Open the list item in view or edit mode.
2. In the **Attachments** field, click the name of the attachment to be opened.
3. Click **OK** to open the document.

Job Title	Technical Trainer
Business Phone	240-555-1231
Home Phone	215-000-0000
Mobile Number	267-000-0000
Fax Number	
Address	6000 Executive Blvd. Suite 410
City	Rockville
State/Province	MD
ZIP/Postal Code	20852
Country/Region	USA
Web Page	
Notes	
Attachments	<a href="#">Meeting Agenda 2011-07-07.docx</a> <a href="#">Action plan for project.docx</a>

Created at 5/4/2011 4:39 PM by Concilla, Scott  
Last modified at 12/8/2011 12:50 PM by Concilla, Scott



# Deleting an Attachment



## Procedure

1. Open the list item in edit mode.
2. In the **Attachments** field, click **Delete** next to the attachment.
3. Click **OK** to confirm the delete.

Address	6000 Executive Blvd. Suite 410
City	Rockville
State/Province	MD
ZIP/Postal Code	20852
Country/Region	USA
Web Page	Type the Web address: ( <a href="#">Click here to test</a> ) http:// Type the description:
Notes	<p>A A   B I U   [List Icons]</p>
Attachments	Meeting Agenda 2011-07-07.docx <input type="checkbox"/> Delete Action plan for project.docx <input type="checkbox"/> Delete
Created at 5/4/2011 4:39 PM by Concilla, Scott Last modified at 12/8/2011 12:50 PM by Concilla, Scott	

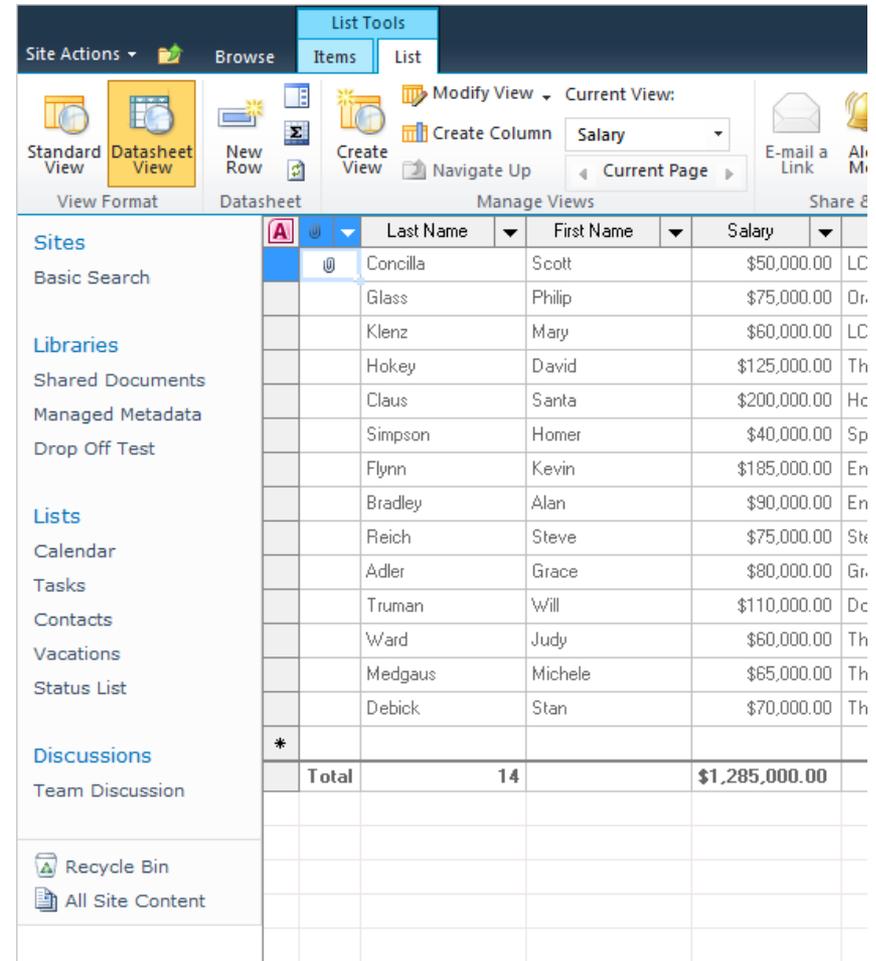


# Using Datasheet View

- Understanding Datasheet View
- Switching to Datasheet View
- Displaying Totals in Datasheet View

# Understanding Datasheet View

- **Datasheet View** displays the list in a format that looks like an Excel spreadsheet or an Access table.

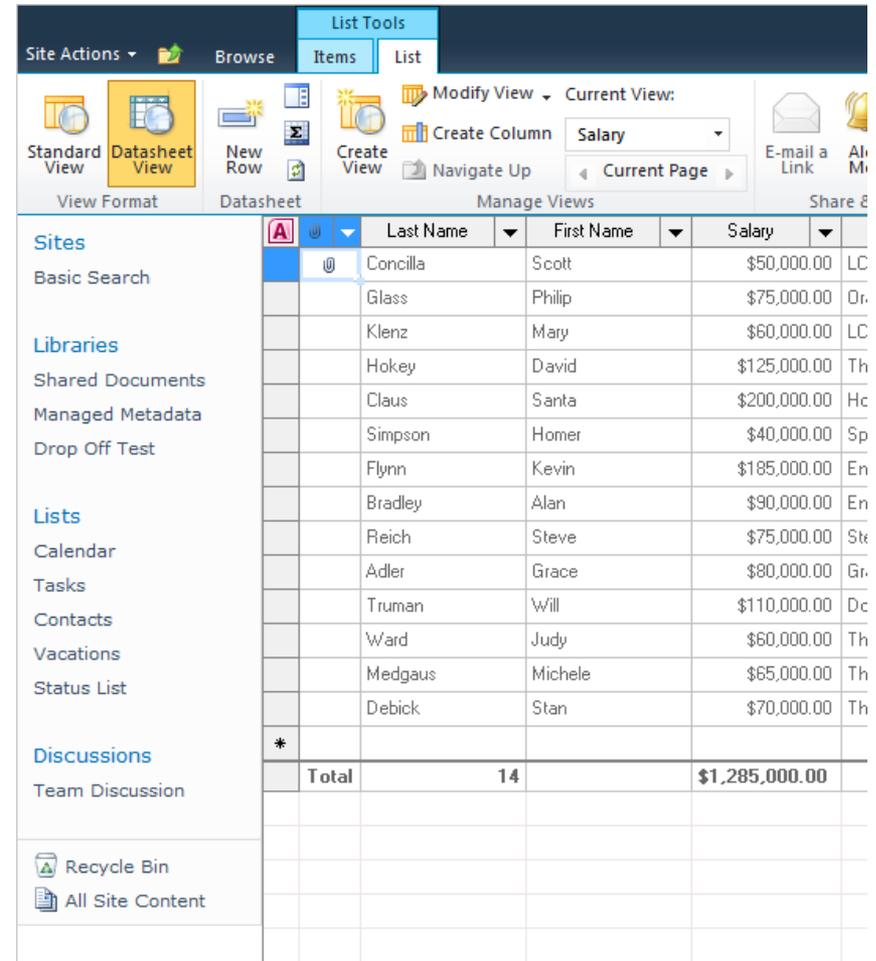


The screenshot displays the SharePoint Datasheet View interface. The top navigation bar includes 'Site Actions', 'Browse', and 'List Tools'. The 'List Tools' ribbon is active, showing options like 'Standard View', 'Datasheet View', 'New Row', 'Create View', 'Modify View', 'Create Column', and 'Navigate Up'. The 'Current View' is set to 'Salary'. The main content area shows a table with columns for 'Last Name', 'First Name', and 'Salary'. The table contains 14 rows of employee data, with a total row at the bottom showing 14 employees and a total salary of \$1,285,000.00.

	Last Name	First Name	Salary	
	Concilla	Scott	\$50,000.00	LC
	Glass	Philip	\$75,000.00	Dr.
	Klenz	Mary	\$60,000.00	LC
	Hokey	David	\$125,000.00	Th
	Claus	Santa	\$200,000.00	Hc
	Simpson	Homer	\$40,000.00	Sp
	Flynn	Kevin	\$185,000.00	En
	Bradley	Alan	\$90,000.00	En
	Reich	Steve	\$75,000.00	St
	Adler	Grace	\$80,000.00	Gr.
	Truman	Will	\$110,000.00	Dc
	Ward	Judy	\$60,000.00	Th
	Medgaus	Michele	\$65,000.00	Th
	Debick	Stan	\$70,000.00	Th
*				
	<b>Total</b>	<b>14</b>	<b>\$1,285,000.00</b>	

# Understanding Datasheet View

- **Datasheet View** allows a user to:
  - Navigate a list using the keyboard.
  - Use right-click context menus.
  - Add, edit, and delete items, columns, and rows.
  - Display totals.



The screenshot displays the SharePoint Datasheet View interface. The ribbon at the top includes 'List Tools' and 'List' tabs. The 'List Tools' ribbon has options like 'Standard View', 'Datasheet View', 'New Row', 'Create View', 'Modify View', 'Create Column', and 'Navigate Up'. The 'List' ribbon has 'Current View' set to 'Salary', 'Current Page', 'E-mail a Link', and 'Share & Connect'. The left-hand navigation pane shows 'Sites', 'Libraries', 'Lists', 'Discussions', and 'Recycle Bin'. The main area shows a table with columns for 'Last Name', 'First Name', and 'Salary'. The table data is as follows:

	Last Name	First Name	Salary	
	Concilla	Scott	\$50,000.00	LC
	Glass	Philip	\$75,000.00	Dr.
	Klenz	Mary	\$60,000.00	LC
	Hokey	David	\$125,000.00	Th
	Claus	Santa	\$200,000.00	Hc
	Simpson	Homer	\$40,000.00	Sp
	Flynn	Kevin	\$185,000.00	En
	Bradley	Alan	\$90,000.00	En
	Reich	Steve	\$75,000.00	St
	Adler	Grace	\$80,000.00	Gr.
	Truman	Will	\$110,000.00	Dc
	Ward	Judy	\$60,000.00	Th
	Medgaus	Michele	\$65,000.00	Th
	Debick	Stan	\$70,000.00	Th
*				
	<b>Total</b>	<b>14</b>	<b>\$1,285,000.00</b>	

# Switching to Datasheet View



## Procedure

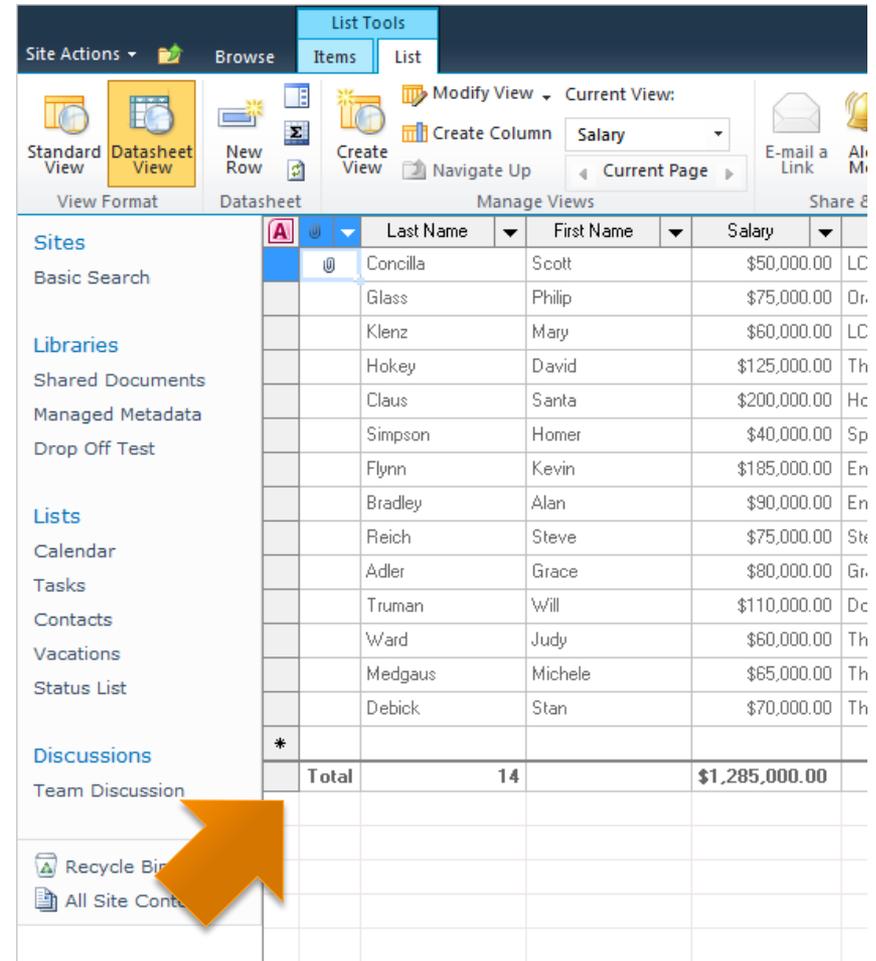
1. On **List** tab, in the **View Format** group, click the **Datasheet View** button.
2. To switch back to normal view, click the **Standard View** button.

The screenshot shows the SharePoint interface with the List Tools ribbon active. The 'View Format' group contains buttons for 'Standard View', 'Datasheet View', and 'New Row'. The 'Datasheet View' button is highlighted with an orange arrow. The 'List' group contains buttons for 'Modify View', 'Create Column', and 'Navigate Up'. The 'Current View' dropdown is set to 'Salary'. The table below shows a list of employees with columns for Last Name, First Name, and Salary.

	Last Name	First Name	Salary	
	Concilla	Scott	\$50,000.00	LC
	Glass	Philip	\$75,000.00	Dr.
	Klenz	Mary	\$60,000.00	LC
	Hokey	David	\$125,000.00	Th
	Claus	Santa	\$200,000.00	Hc
	Simpson	Homer	\$40,000.00	Sp
	Flynn	Kevin	\$185,000.00	En
	Bradley	Alan	\$90,000.00	En
	Reich	Steve	\$75,000.00	St
	Adler	Grace	\$80,000.00	Gr.
	Truman	Will	\$110,000.00	Dc
	Ward	Judy	\$60,000.00	Th
	Medgaus	Michele	\$65,000.00	Th
	Debick	Stan	\$70,000.00	Th
*				
	<b>Total</b>	<b>14</b>	<b>\$1,285,000.00</b>	

# Displaying Totals

- In datasheet view, a **Total** row can be displayed for text and numeric columns.
- You may only select one total function per column.



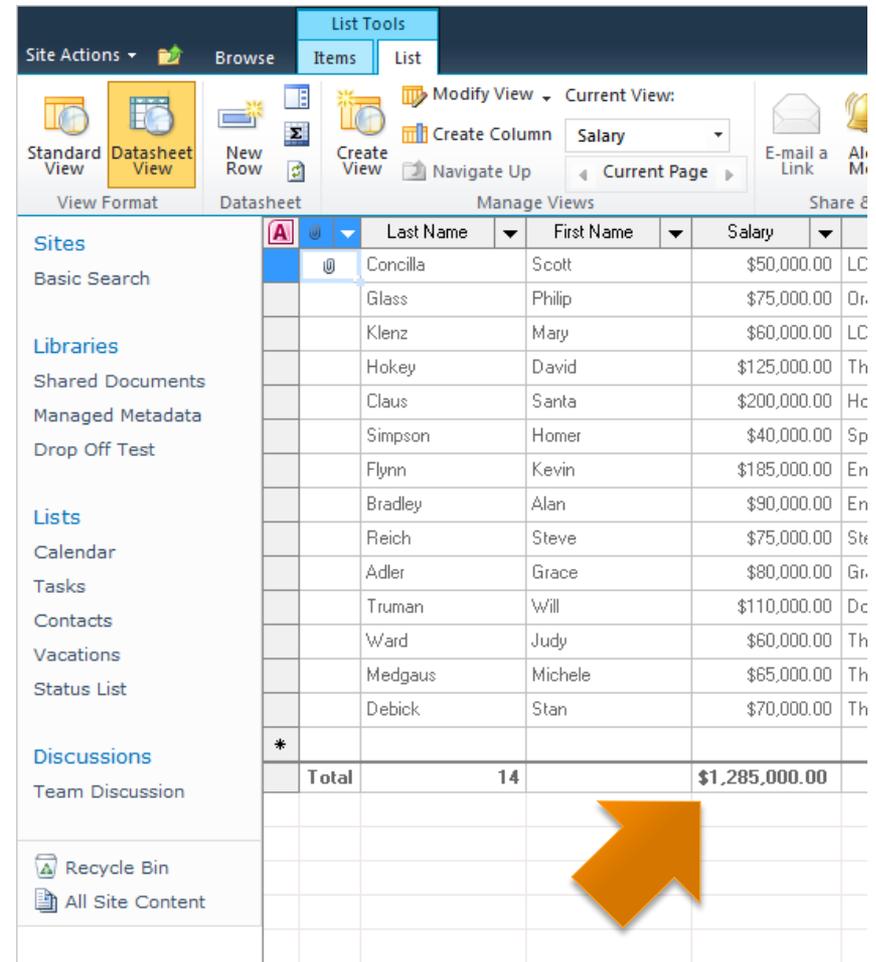
The screenshot shows a SharePoint list in Datasheet View. The ribbon includes 'List Tools' with 'Items' and 'List' tabs. The 'List' tab is active, showing options like 'Modify View', 'Create Column', and 'Navigate Up'. The 'Current View' is set to 'Salary'. The list contains 14 rows of employee data with columns for Last Name, First Name, and Salary. A 'Total' row is displayed at the bottom of the list, showing a total of 14 employees and a total salary of \$1,285,000.00. An orange arrow points to the 'Total' row.

	Last Name	First Name	Salary	
	Concilla	Scott	\$50,000.00	LC
	Glass	Philip	\$75,000.00	Dr.
	Klenz	Mary	\$60,000.00	LC
	Hokey	David	\$125,000.00	Th
	Claus	Santa	\$200,000.00	Hc
	Simpson	Homer	\$40,000.00	Sp
	Flynn	Kevin	\$185,000.00	En
	Bradley	Alan	\$90,000.00	En
	Reich	Steve	\$75,000.00	St
	Adler	Grace	\$80,000.00	Gr.
	Truman	Will	\$110,000.00	Dc
	Ward	Judy	\$60,000.00	Th
	Medgaus	Michele	\$65,000.00	Th
	Debick	Stan	\$70,000.00	Th
*				
	<b>Total</b>	<b>14</b>	<b>\$1,285,000.00</b>	

# Displaying Totals

- The functions available for number-based columns are:

- Sum
- Average
- Count
- Maximum
- Minimum
- Standard Deviation
- Variance

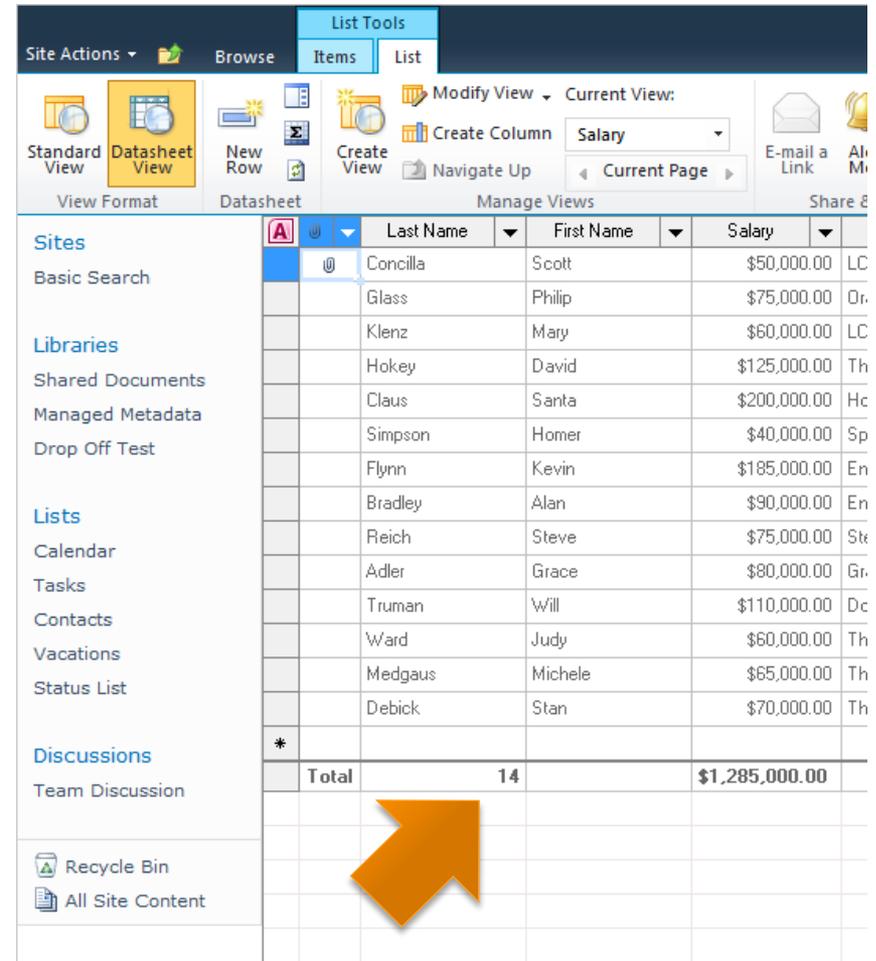


The screenshot shows a SharePoint list interface. The 'List Tools' ribbon is active, with the 'List' tab selected. The 'Manage Views' section shows 'Current View: Salary'. The table below has columns for 'Last Name', 'First Name', and 'Salary'. The total row is highlighted with an orange arrow pointing to the total salary of \$1,285,000.00.

	Last Name	First Name	Salary	
	Concilla	Scott	\$50,000.00	LC
	Glass	Philip	\$75,000.00	Dr.
	Klenz	Mary	\$60,000.00	LC
	Hokey	David	\$125,000.00	Th
	Claus	Santa	\$200,000.00	Hc
	Simpson	Homer	\$40,000.00	Sp
	Flynn	Kevin	\$185,000.00	En
	Bradley	Alan	\$90,000.00	En
	Reich	Steve	\$75,000.00	Stk
	Adler	Grace	\$80,000.00	Gr.
	Truman	Will	\$110,000.00	Dc
	Ward	Judy	\$60,000.00	Th
	Medgaus	Michele	\$65,000.00	Th
	Debick	Stan	\$70,000.00	Th
*				
	<b>Total</b>	<b>14</b>	<b>\$1,285,000.00</b>	

# Displaying Totals

- Totals can be displayed for text-based columns, however, the total is limited to the **Count** function.

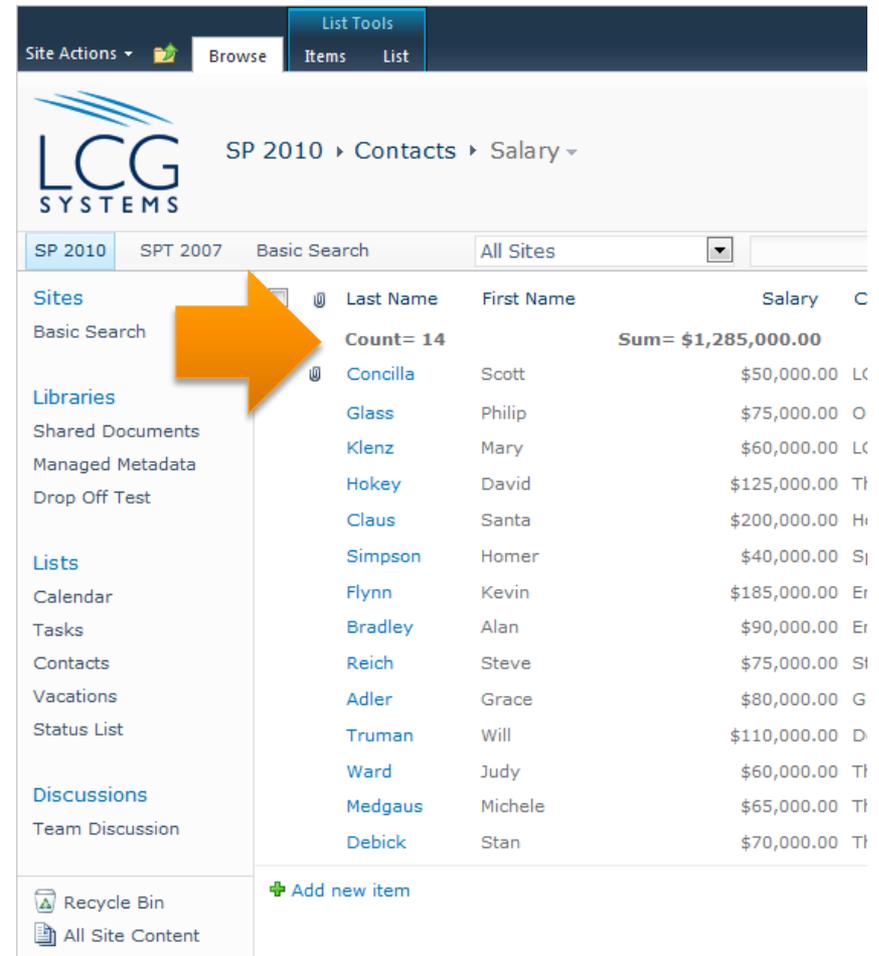


The screenshot shows a SharePoint list interface. The top navigation bar includes 'Site Actions', 'Browse', and 'List Tools'. The 'List Tools' menu is open, showing options like 'Standard View', 'Datasheet View', 'New Row', 'Create View', 'Modify View', 'Create Column', and 'Navigate Up'. The 'Current View' is set to 'Salary'. The table below has columns for 'Last Name', 'First Name', and 'Salary'. A total row is visible at the bottom of the table, with a large orange arrow pointing to it.

	Last Name	First Name	Salary	
	Concilla	Scott	\$50,000.00	LC
	Glass	Philip	\$75,000.00	Dr.
	Klenz	Mary	\$60,000.00	LC
	Hokey	David	\$125,000.00	Th
	Claus	Santa	\$200,000.00	Hc
	Simpson	Homer	\$40,000.00	Sp
	Flynn	Kevin	\$185,000.00	En
	Bradley	Alan	\$90,000.00	En
	Reich	Steve	\$75,000.00	St
	Adler	Grace	\$80,000.00	Gr.
	Truman	Will	\$110,000.00	Dc
	Ward	Judy	\$60,000.00	Th
	Medgaus	Michele	\$65,000.00	Th
	Debick	Stan	\$70,000.00	Th
*				
	<b>Total</b>	<b>14</b>	<b>\$1,285,000.00</b>	

# Displaying Totals

- Totals cannot be added in standard view, however, if turned on for a view in datasheet view, they will be displayed at the top of the list when viewed in standard view.



The screenshot shows a SharePoint list titled "SP 2010 > Contacts > Salary" in standard view. The list is displayed in a table format with columns for "Last Name", "First Name", and "Salary". A summary row is visible at the top of the data table, showing "Count = 14" and "Sum = \$1,285,000.00". An orange arrow points to the summary row. The left sidebar contains navigation options such as "Sites", "Libraries", "Lists", and "Discussions".

	Last Name	First Name	Salary	
Count = 14		Sum = \$1,285,000.00		
	Concilla	Scott	\$50,000.00	LC
	Glass	Philip	\$75,000.00	O
	Klenz	Mary	\$60,000.00	LC
	Hokey	David	\$125,000.00	TI
	Claus	Santa	\$200,000.00	Hi
	Simpson	Homer	\$40,000.00	Si
	Flynn	Kevin	\$185,000.00	Er
	Bradley	Alan	\$90,000.00	Er
	Reich	Steve	\$75,000.00	SI
	Adler	Grace	\$80,000.00	G
	Truman	Will	\$110,000.00	D
	Ward	Judy	\$60,000.00	TI
	Medgaus	Michele	\$65,000.00	TI
	Debick	Stan	\$70,000.00	TI

# Displaying Totals



## Procedure

1. Display the list in **Datasheet View**.
2. In the **Datasheet** group, click the **Show Totals** button.
3. The **Total** row displays at the end of the list.
4. Use the drop-down menus in the row to select total functions.

The screenshot shows the 'List Tools' ribbon in SharePoint. The 'List' tab is active, and the 'Show Totals' button is highlighted. An orange arrow points to this button. Below the ribbon, a table of names is displayed. The table has columns for 'Last Name' and 'First Name'. The 'Total' row is visible at the bottom of the table, showing a count of 14 and a value of \$1.5.

Last Name	First Name	
Concilla	Scott	
Glass	Philip	
Klenz	Mary	
Hokey	David	
Claus	Santa	
Simpson	Homer	
Flynn	Kevin	
Bradley	Alan	
Reich	Steve	
Adler	Grace	
Truman	Will	
Ward	Judy	
Medgaus	Michele	
Debick	Stan	
*		
<b>Total</b>	<b>14</b>	<b>\$1.5</b>

# Creating Personal Views

- About Views
- Types of Views
- Creating a Personal View of a List

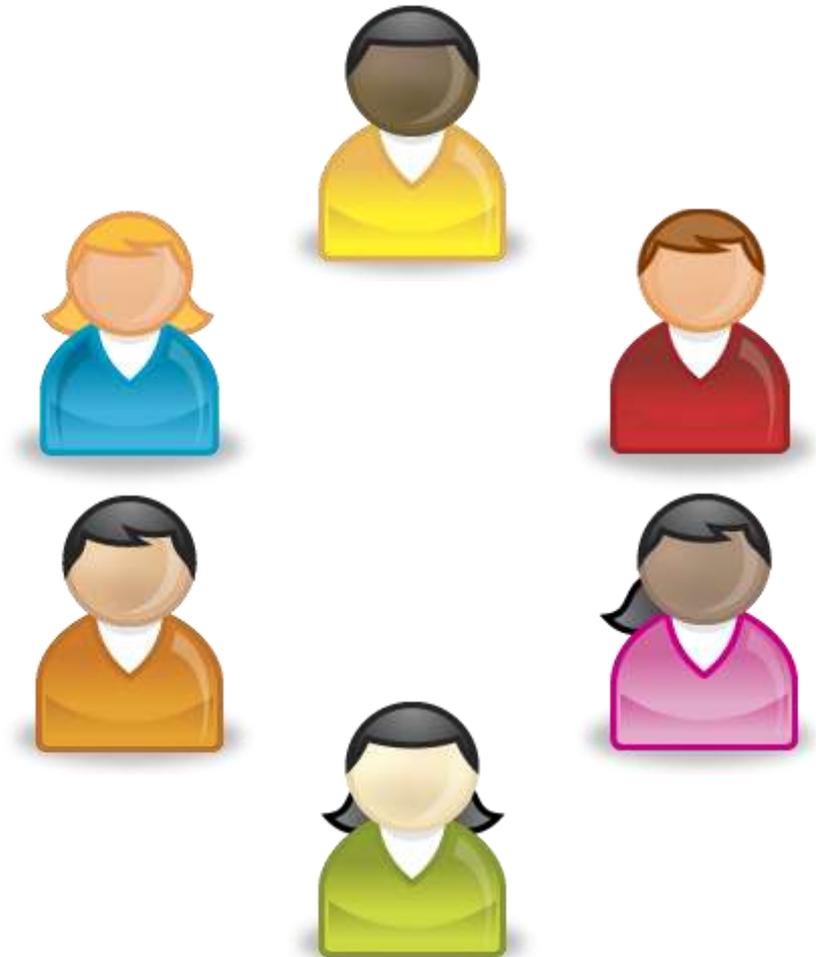
# About Views

- A **View** is a collection of settings that determines how the items in a list will be displayed.
- Views are found at the end of the breadcrumb trail and in the **Manage Views** group.



# Types of Views

- Public View
  - Can be created by anyone with sufficient rights to create views.
    - Usually a list owner and/or a site owner.
  - A public view is available to all users of the list.



# Types of Views

- Personal View
  - Anyone can create a personal view.
  - A personal view is only available to the person who created the view.



# Creating a Personal View

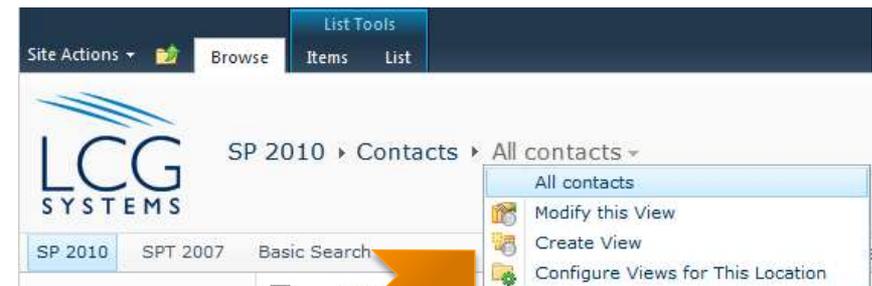
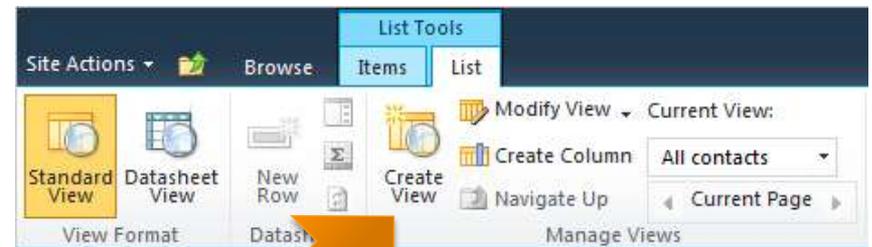


## Procedure

1. On the **List** tab, in the **Manage Views** group, click the **Create View** button.

OR

Click the view link at the end of the breadcrumb trail and select **Create View**.



# Creating a Personal View



## Procedure (continued)

2. Select **Standard View** to create a new view, or select an existing view from the list.
3. Give the view a name.
4. Select the desired options for the view.
5. Click **OK** when finished.

The screenshot shows the 'Create View' dialog box in SharePoint. The breadcrumb path is 'SP 2010 > Contacts > List Settings > Create View'. The dialog is titled 'SP 2010 > SPT 2007 > Basic Search'. On the left is a navigation pane with categories: Sites (Basic Search), Libraries (Shared Documents, Managed Metadata, Drop Off Test), Lists (Calendar, Tasks, Contacts, Vacations, Status List), and Discussions (Team Discussion). The main area is divided into sections: 'Name' (with a text box containing 'My View'), 'Audience' (with radio buttons for 'Create a Personal View' and 'Create a Public View'), and 'Columns' (a table for selecting columns to display). The 'Columns' table has columns for 'Display' (checkbox), 'Column Name', and 'Position from Left' (dropdown). The 'Columns' section is expanded to show a list of columns with checkboxes and position dropdowns.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Attachments	1
<input checked="" type="checkbox"/>	Last Name (link to item with edit menu)	2
<input checked="" type="checkbox"/>	First Name	3
<input checked="" type="checkbox"/>	Company	4
<input checked="" type="checkbox"/>	Business Phone	5
<input checked="" type="checkbox"/>	Home Phone	6
<input checked="" type="checkbox"/>	E-mail Address	7
<input type="checkbox"/>	Address	8
<input type="checkbox"/>	City	9
<input type="checkbox"/>	Company Phonetic	10
<input type="checkbox"/>	Content Type	11
<input type="checkbox"/>	Country/Region	12
<input type="checkbox"/>	Created	13
<input type="checkbox"/>	Created By	14
<input type="checkbox"/>	Edit (link to edit item)	15
<input type="checkbox"/>	Fax Number	16
<input type="checkbox"/>	First Name Phonetic	17

# Integrating Lists with Office

- Lists and Office Applications

# Lists and Office Applications

- SharePoint lists can share data and integrate with several Office applications.
  - Access
  - Excel
  - Outlook
  - Project
  - SharePoint Workspace
  - Visio



# Lists and Office Applications

- In this course, we will look at two of the most common procedures.
  - Exporting SharePoint list data to Excel
  - Connecting a SharePoint list to Outlook



# Working with Excel

- Using Excel with Lists
- Preparing to Export to Excel
- Exporting a List to Excel
- Refreshing the List Data in Excel
  - Manually
  - Automatically
- The Consequences of Refreshing Data
- Unlinking an Excel Spreadsheet
- Importing from Excel

# Using Excel with Lists

- The data in a list can be exported to Excel for a variety of purposes.
  - More formatting and printing options.
  - Creating a chart.
  - Analyzing the data with a PivotTable.



# Using Excel with Lists

- Once exported, a “one-way connection” is maintained between Excel and SharePoint
  - Changes to the list data in SharePoint can be pulled down into Excel.
  - Changes made in Excel CANNOT be pushed up to SharePoint.



# Preparing to Export to Excel



## CAUTION!!

- When exporting list data to Excel, SharePoint will only export the currently **visible** columns.
- It may be necessary to change the list view before performing the export.



# Exporting a List to Excel



## Procedure

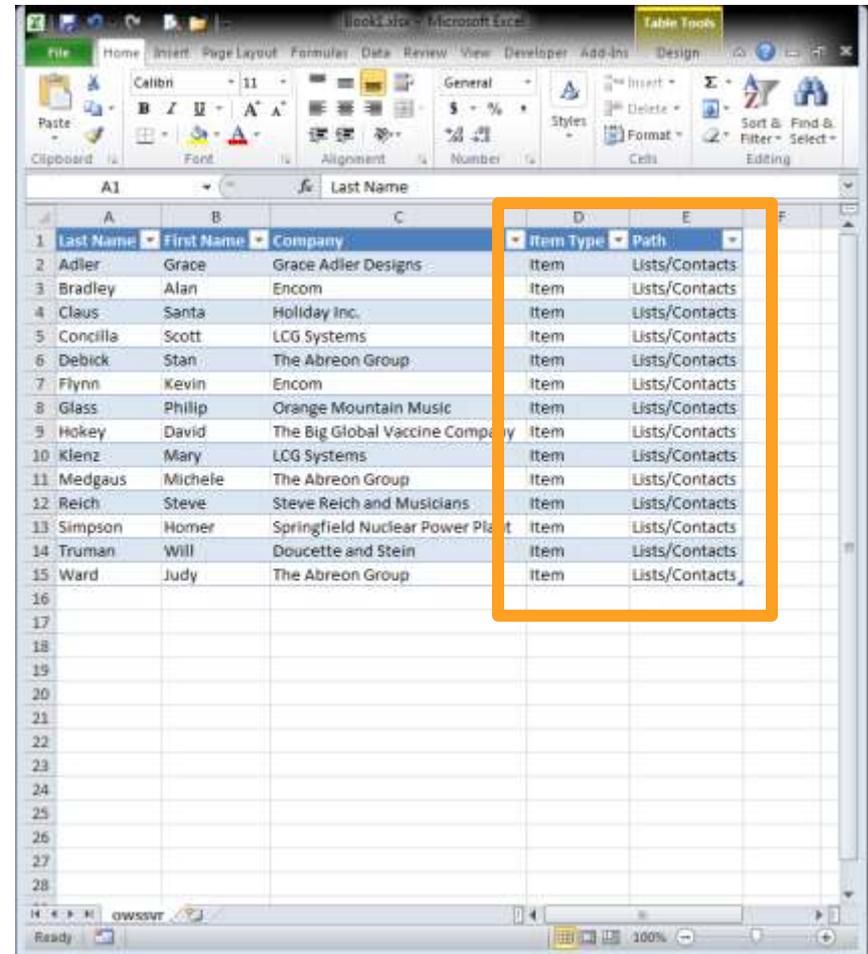
1. On the **List** tab, in the **Connect & Export** group, click the **Export to Excel** button.
2. In the **File Download** dialog box, choose **Open**.
3. Excel opens with the list data displayed and formatted as a table.

The screenshot shows the Microsoft Office ribbon with the 'Connect & Export' group selected. The 'Export to Excel' button is highlighted with an orange arrow. Below the ribbon, a table of data is visible, including columns for 'Business Phone' and 'Home Phone'.

	Business Phone	Home Phone
	212-555-0002	
	408-555-0000	
	301-000-0000	240-000-0000
	240-555-1231	215-000-0000
	412-538-0003	
	408-555-0000	
sic	212-533-0000	212-533-0000
ne Company	301-555-1212	
	240-283-0000	301-301-0000
	412-538-0000	
sicians	212-555-0000	
ower Plant	455-555-1212	333-555-6666
	212-555-0011	
	412-538-0000	

# Exporting a List to Excel

- As part of the export, two columns labeled **Item Type** and **Path** are also displayed at the far right of the table data.
- These columns can be safely deleted.



The screenshot shows a Microsoft Excel spreadsheet with a table of data. The table has five columns: Last Name, First Name, Company, Item Type, and Path. The 'Item Type' and 'Path' columns are highlighted with an orange box. The data in the table is as follows:

Last Name	First Name	Company	Item Type	Path
Adler	Grace	Grace Adler Designs	Item	Lists/Contacts
Bradley	Alan	Encom	Item	Lists/Contacts
Claus	Santa	Holiday Inc.	Item	Lists/Contacts
Concilla	Scott	LCG Systems	Item	Lists/Contacts
Debick	Stan	The Abreon Group	Item	Lists/Contacts
Flynn	Kevin	Encom	Item	Lists/Contacts
Glass	Philip	Orange Mountain Music	Item	Lists/Contacts
Hokey	David	The Big Global Vaccine Company	Item	Lists/Contacts
Klenz	Mary	LCG Systems	Item	Lists/Contacts
Medgaus	Michele	The Abreon Group	Item	Lists/Contacts
Reich	Steve	Steve Reich and Musicians	Item	Lists/Contacts
Simpson	Homer	Springfield Nuclear Power Plant	Item	Lists/Contacts
Truman	Will	Doucette and Stein	Item	Lists/Contacts
Ward	Judy	The Abreon Group	Item	Lists/Contacts

# Refreshing the List Data in Excel

- Changes made to the list in SharePoint are not automatically pushed to Excel.
- You must either:
  - Manually refresh the data.
  - Configure the file to refresh automatically when opened.

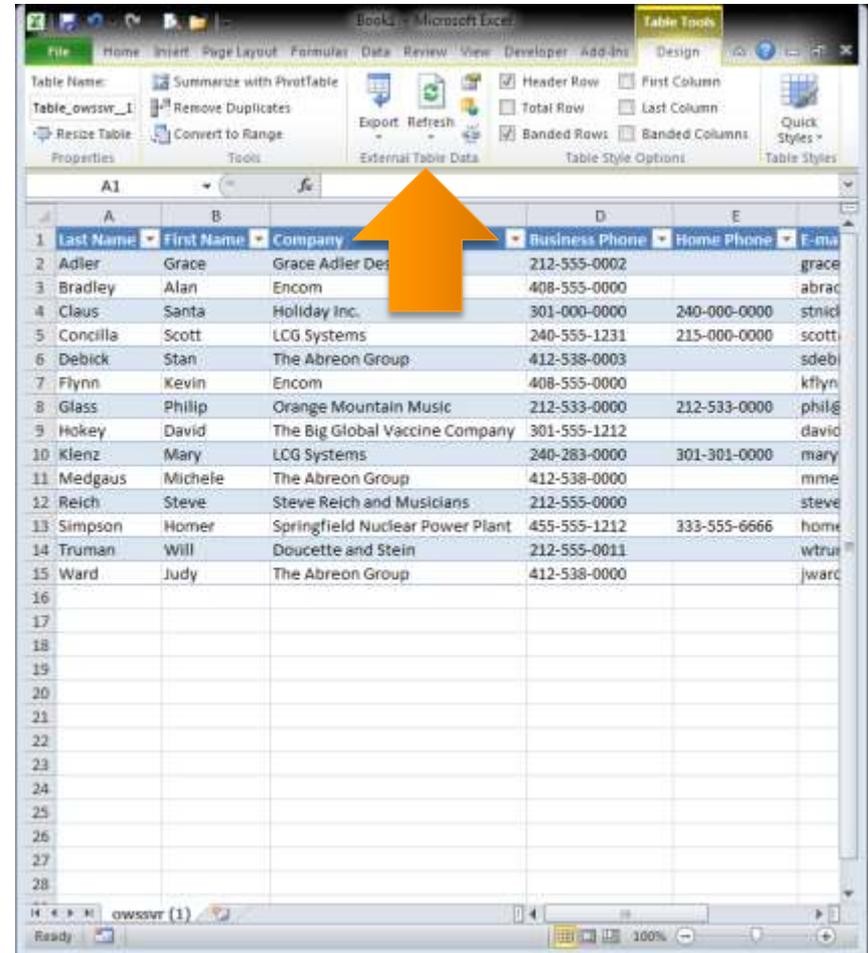


# Refreshing Data – Manually



## Procedure

1. In Excel, click the table data to display the **Table Tools**.
2. On the **Design** tab, in the **External Table Data** group, click the **Refresh** button.

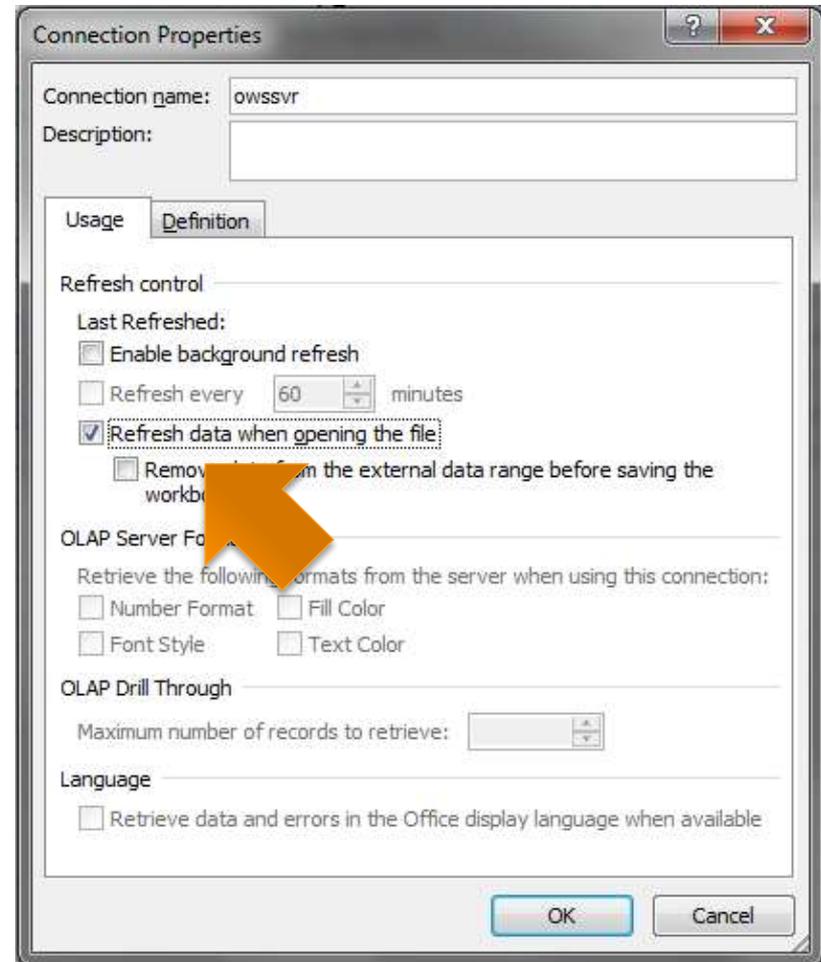


# Refreshing Data – Automatically



## Procedure

1. Click the bottom of the **Refresh** button and choose **Connection Properties**.
2. In the **Connection Properties** dialog box, in the **Refresh control** section, select the desired options.
3. Click **OK**.



# Refreshing Data – Consequences

## What will happen to ITEMS when you perform a refresh in Excel...

If **items** have been **added** in **SharePoint**,  
they will be **added** to **Excel**.

If **items** have been **deleted** in **SharePoint**,  
they will be **deleted** from **Excel**.

If **items** have been **changed** in **SharePoint**,  
they will be **changed** in **Excel**.

If **items** have been **changed** in **Excel**,  
the **changes** in **Excel** will be **lost**.

# Refreshing Data – Consequences

What will happen to ROWS  
when you perform a refresh in Excel...

If **rows** have been added **INSIDE** the Excel table,  
they will be **deleted**.

If **rows** have been added **OUTSIDE** the Excel table,  
they will **remain**.

If **rows** have been **deleted** from the Excel table,  
they will be **restored**.

# Refreshing Data – Consequences

What will happen to COLUMNS  
when you perform a refresh in Excel...

If **columns** have been **added** to the Excel table,  
they will **remain**.

If **columns** have been **deleted** from the Excel table,  
they will **not be restored**.

# Unlinking an Excel Spreadsheet

- Unlinking breaks the connection between the Excel data table and the SharePoint list.
- The existing data will remain in Excel.



# Unlinking an Excel Spreadsheet

- Breaking the link between an Excel data table and a SharePoint list is permanent.
- There is no way to restore the connection.

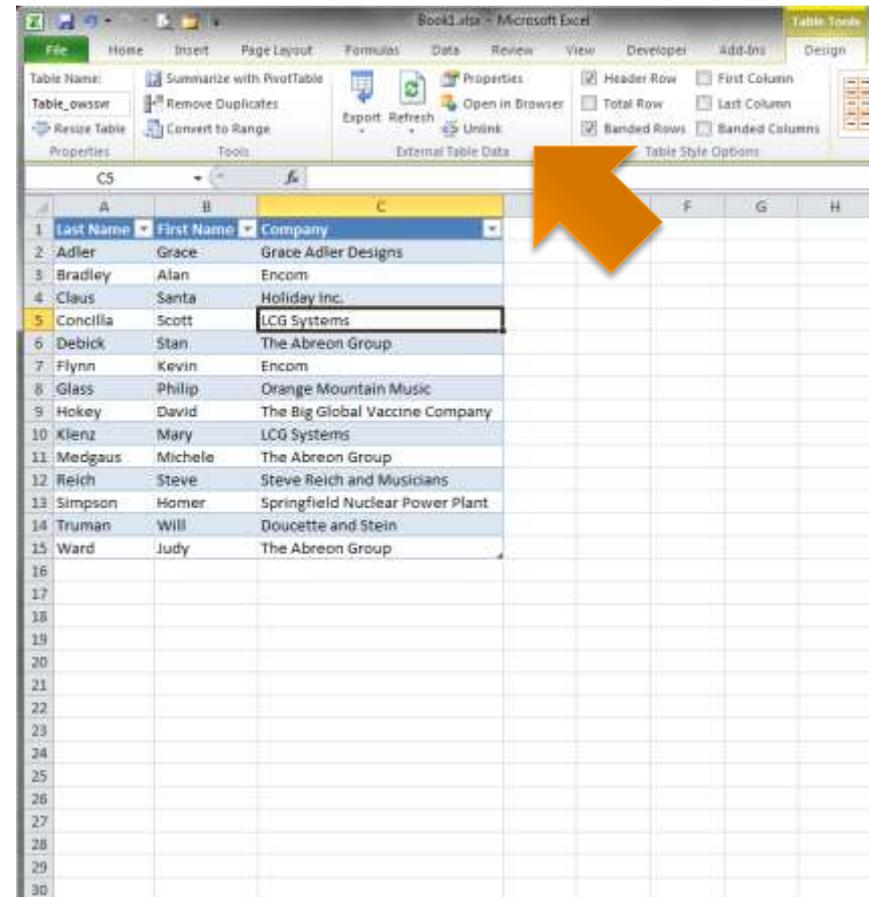


# Unlinking an Excel Spreadsheet



## Procedure

1. In Excel, click the table data to display the **Table Tools**.
2. On the **Design** tab, in the **External Table Data** group, click the **Unlink** button.
3. Click **OK** to confirm and continue.



# Importing from Excel

- If we can export list data from SharePoint to Excel, is it possible to go the other way and take an Excel spreadsheet and import its information into a SharePoint list?



# Importing from Excel

- It is possible to import an Excel spreadsheet to a SharePoint list however, **this can only be done when creating a new list.**
  - You cannot import Excel data into an existing SharePoint list.



# Importing from Excel

- Since only site owners and administrators can create new SharePoint lists, we will not be covering the import process in this class.



# Working with Outlook

- Using Outlook with Lists
- Connecting a List to Outlook
- Managing Update Conflicts
- Deleting a Link to SharePoint

# Using Outlook with Lists

- Several list types in SharePoint can be connected to Outlook.
  - Contacts
  - Tasks
  - Calendars
  - Discussion Boards



# Using Outlook with Lists

- The connection is a “two-way” connection between Outlook and SharePoint.
- Data can be updated in either SharePoint or Outlook and it will eventually “refresh” on both sides.



# Connecting a List to Outlook



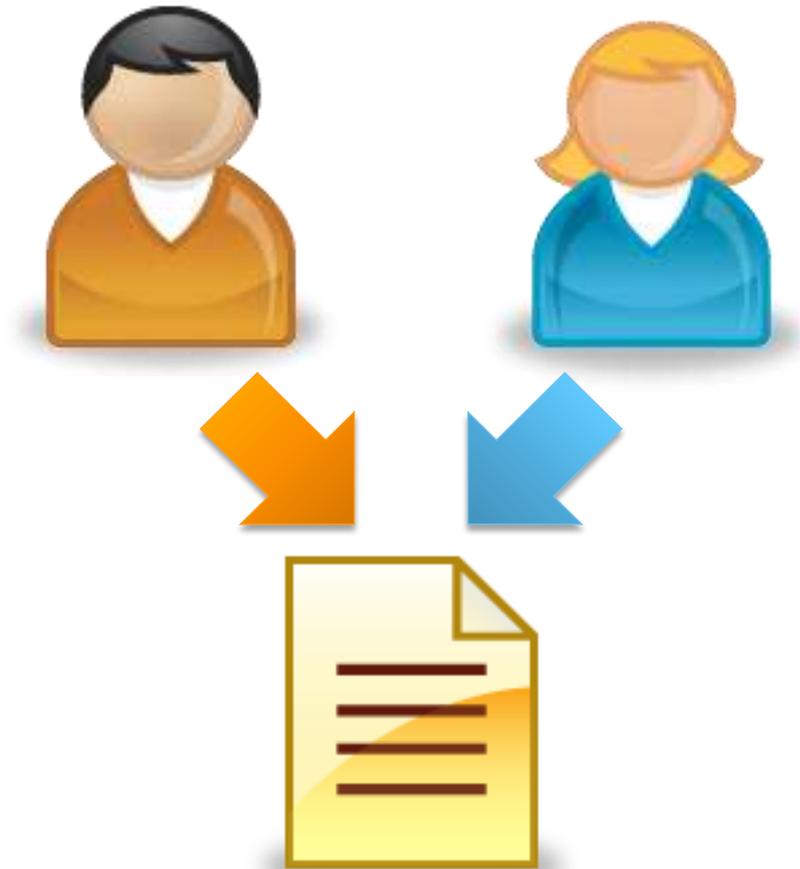
## Procedure

1. On the **List** tab, in the **Connect & Export** group, click the **Connect to Outlook** button.
2. Confirm and **Allow** the connection.
3. The list appears in Outlook.

	Business Phone	Home Phone
	212-555-0002	
	408-555-0000	
	301-000-0000	240-000-0000
	240-555-1231	215-000-0000
	412-538-0003	
	408-555-0000	
sic	212-533-0000	212-533-0000
ne Company	301-555-1212	
	240-283-0000	301-301-0000
	412-538-0000	
sicians	212-555-0000	
ower Plant	455-555-1212	333-555-6666
	212-555-0011	
	412-538-0000	

# Managing Update Conflicts

- Question:
  - What if two people have the same item open at the same time in both SharePoint and Outlook? Whose changes will win?



# Managing Update Conflicts

- Answer:
  - Whoever saves first wins.
  - The losing party will either see an error, or the changes will simply not be saved.



# Deleting a Link to SharePoint

- Deleting a link breaks the connection between Outlook and the SharePoint list.
- The existing data will NOT be displayed in Outlook.

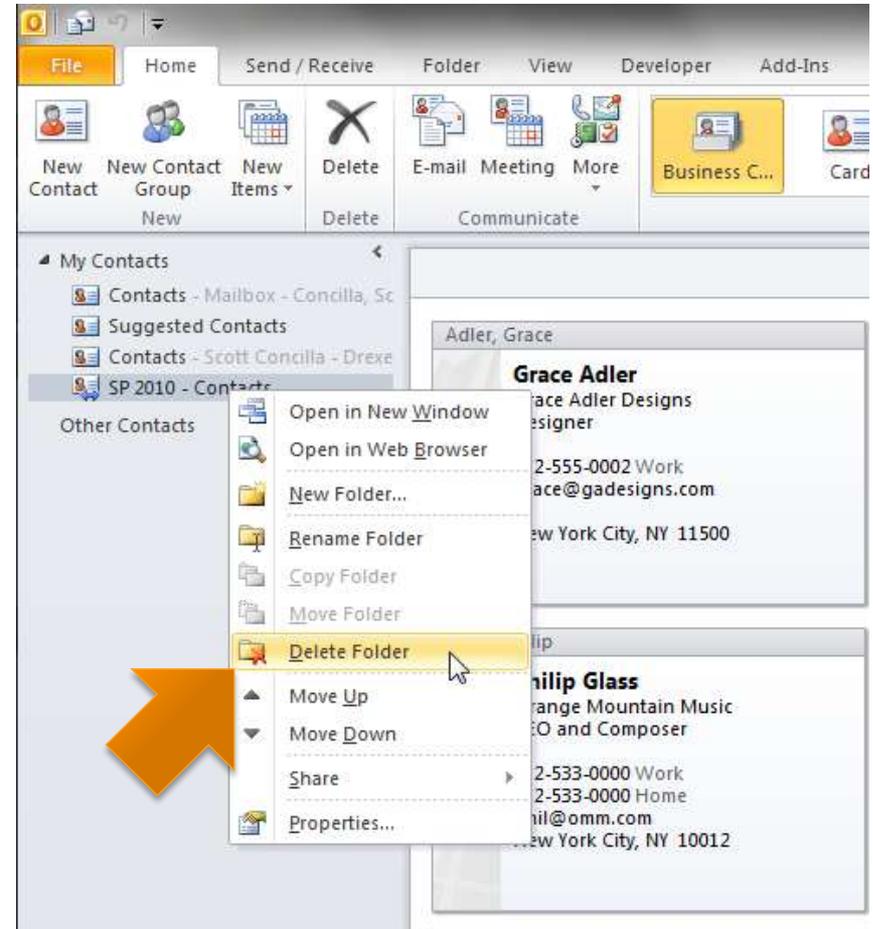


# Deleting a Link to SharePoint



## Procedure

1. Display the folder list in Outlook.
2. Right-click on the name of the SharePoint list.
3. Choose **Delete Folder** or **Delete Calendar**.
4. Click **Yes** to confirm.

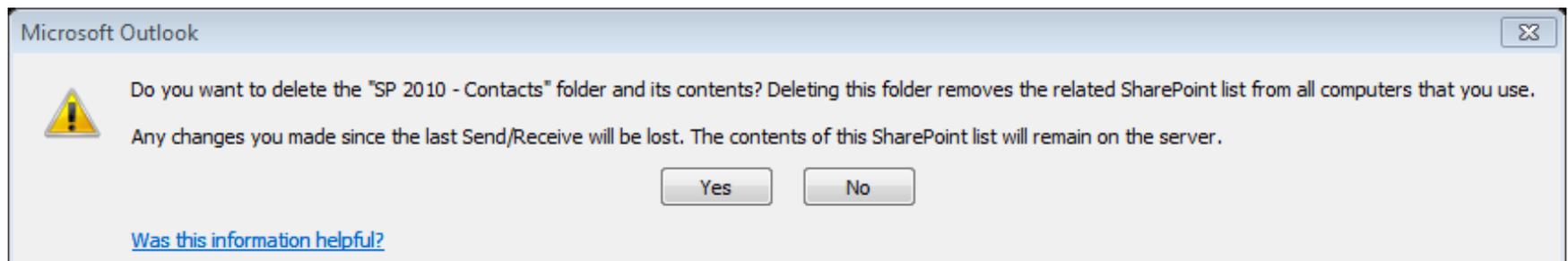


# Deleting a Link to SharePoint



## NOTE!

- The text of the confirmation dialog box that Outlook displays when deleting a link is a bit unclear.
- This procedure is only deleting the LINK, nothing on SharePoint is being changed or deleted.



# Using Alerts

- About Alerts
- Best Practices for Alerts
- Creating an Alert for a List Item
- Creating an Alert for a List
- The Two Alert Me Buttons
- Managing Alerts in SharePoint
- Managing Alerts in Outlook 2007
- Managing Alerts in Outlook 2010

# About Alerts

- Alerts can notify you automatically via e-mail based on the conditions you set.
  - When a list item is modified
  - When a list item is deleted
  - When new items are added to a list



# Best Practices for Alerts



Use SharePoint  
to create alerts



Use Outlook to  
manage alerts

# Creating an Alert – List Item

- Alerts can be created for single list items.
- The alert conditions only apply to the **item selected**.
- Use one of the following two methods to create an alert.



# Creating an Alert – List Item



## Procedure (Method 1)

1. Click the drop-down menu of the list item and choose **Alert Me**.
2. Select the desired alert options and click **OK**.

The screenshot shows a SharePoint interface with a 'List Tools' ribbon. The 'List' tab is active, and the 'Alert Me' button is highlighted. A context menu is open over the 'Concilla' list item, with the 'Alert Me' option selected. A large orange arrow points to the 'Alert Me' option in the context menu.

Site Actions	Browse	List Tools	Items	List
New Item	New Folder	View Item	Edit Item	Delete Item
Version History	Item Permissions	Attach File	Alert Me	

Sites	Basic Search	Libraries	Lists	Tasks	Contacts	Vacations	Status List	Discussions
					Concilla			

Last Name	First Name
Adler	Grace
Bradley	Alan
Claus	Santa
Concilla	Scott
	Stan
	Kevin
	Philip
	David
	Mary
	Michele
	Steve
	Homer
	Will
	Judy

# Creating an Alert – List Item



## Procedure (Method 2)

1. Select the checkbox of the list item.
2. On the **Items** tab in the **Share & Track** group, click the **Alert Me** button and choose **Set alert on this item**.
3. Select the desired alert options and click **OK**.

The screenshot shows the SharePoint interface with the 'List Tools' ribbon active. The 'Items' tab is selected, and the 'Alert Me' button is highlighted in the 'Share & Track' group. A table of list items is displayed below, with the 'Concilla' item selected and its checkbox checked. An orange arrow points to the 'Alert Me' button, and another orange arrow points to the 'Concilla' row in the table.

	Last Name	First Name
<input type="checkbox"/>	Adler	Grace
<input type="checkbox"/>	Bradley	Alan
<input type="checkbox"/>	Claus	Santa
<input checked="" type="checkbox"/>	Concilla	Scott
<input type="checkbox"/>	Debick	Stan
<input type="checkbox"/>	Flynn	Kevin
<input type="checkbox"/>	Glass	Philip
<input type="checkbox"/>	Hokey	David
<input type="checkbox"/>	Klenz	Mary
<input type="checkbox"/>	Medgaus	Michele
<input type="checkbox"/>	Reich	Steve
<input type="checkbox"/>	Simpson	Homer
<input type="checkbox"/>	Truman	Will
<input type="checkbox"/>	Ward	Judy

# Creating an Alert – List

- Alerts can be created for the entire list.
- The alert conditions apply to the **entire list**.



# Creating an Alert – List



## Procedure

1. On the **List** tab, in the **Share & Track** group, click the **Alert Me** button and choose **Set alert on this list**.
2. Select the desired alert options and click **OK**.

The screenshot shows the SharePoint List Tools ribbon with the 'List' tab selected. The 'Share & Track' group contains the 'Alert Me' button, which is highlighted with an orange arrow. The ribbon also shows 'E-mail a Link' and 'RSS Feed' buttons. The main content area displays a table of contacts with columns for Last Name, First Name, and Company.

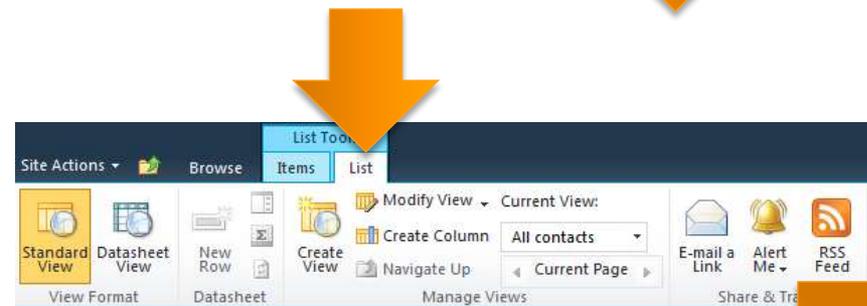
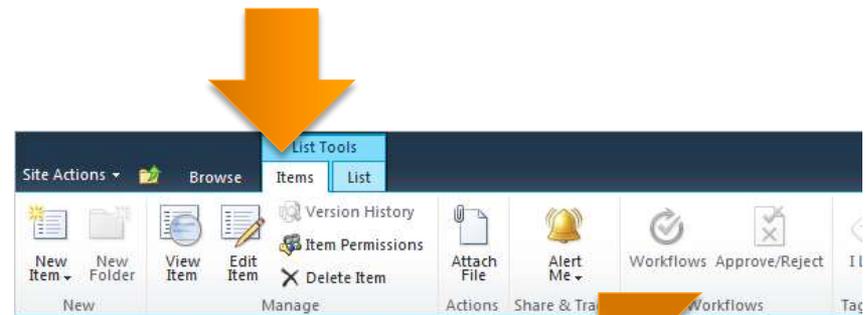
Last Name	First Name	Company
Adler	Grace	Grace Adler Designs
Bradley	Alan	Encom
Claus	Santa	Holiday Inc.
Concilla	Scott	LCG Systems
Debick	Stan	The Abreon Group
Flynn	Kevin	Encom
Glass	Philip	Orange Mountain Music
Hokey	David	The Big Global Vaccine Company
Klenz	Mary	LCG Systems
Medgaus	Michele	The Abreon Group
Reich	Steve	Steve Reich and Musicians
Simpson	Homer	Springfield Nuclear Power Plant
Truman	Will	Doucette and Stein
Ward	Judy	The Abreon Group

# The Two Alert Me Buttons



## CAUTION!!

- There are two **Alert Me** buttons on the ribbon.
- On both the **Items** tab and the **List** tab.
- They look the same but they do different things.
- Make sure you select the correct button when creating alerts.



# Managing Alerts in SharePoint

- Each SharePoint site maintains its own list of alerts for a user.
- SharePoint lacks a central interface for all of a user's alerts across all sites.



# Managing Alerts in SharePoint



## Procedure (Method 1)

1. Click either **Alert Me** button and choose **Manage My Alerts**.
  - To create new alerts, click **Add Alert** and follow the prompts
  - To delete alerts, select the checkboxes next to the alerts and click **Delete Selected Alerts**.

The screenshot shows the SharePoint interface with the 'List Tools' ribbon selected. The 'Alert Me' button is highlighted in yellow, and its dropdown menu is open, showing the 'Manage My Alerts' option. A large orange arrow points to the 'Manage My Alerts' option. Below the ribbon, a table of items is visible, with columns for 'Last Name', 'First Name', and 'Company Name'. The 'Alert Me' button is located in the 'Actions' group of the 'List' tab.

	Last Name	First Name	Company Name
<input type="checkbox"/>	Adler	Grace	Grace Adler Designs
<input type="checkbox"/>	Bradley		Encom
<input type="checkbox"/>	Claus	Stan	Holiday Inc.
<input checked="" type="checkbox"/>	Concilla	Scott	LCG Systems
<input type="checkbox"/>	Debick	Stan	The Abreon Group
<input type="checkbox"/>	Flynn	Kevin	Encom
<input type="checkbox"/>	Glass	Philip	Orange Mountain Music
<input type="checkbox"/>	Hokey	David	The Big Global Vaccine Co
<input type="checkbox"/>	Klenz	Mary	LCG Systems
<input type="checkbox"/>	Medgaus	Michele	The Abreon Group
<input type="checkbox"/>	Reich	Steve	Steve Reich and Musicians
<input type="checkbox"/>	Simpson	Homer	Springfield Nuclear Power
<input type="checkbox"/>	Truman	Will	Doucette and Stein
<input type="checkbox"/>	Ward	Judy	The Abreon Group

# Managing Alerts in SharePoint



## Procedure (Method 2)

1. Select the username menu in the upper right-hand corner and choose **My Settings**.
2. On the **User Information** screen, click **My Alerts**.
3. Use **Add** or **Delete** as desired.

The screenshot shows a SharePoint user interface. At the top right, a dropdown menu is open for the user 'Concilla, Scott'. The menu items are: 'My Settings' (highlighted with an orange arrow), 'Sign in as Different User', 'Request Access', 'Sign Out', and 'Personalize this Page'. Below the menu, a list of business phone numbers and email addresses is visible.

Business Phone	Phone Number	Email Address
212-555-0002		sdebick@abreon.com
408-555-0000		kflynn@encom.com
301-000-0000	212-533-0000	phil@omm.com
240-555-1231		david.hokey@vaccines.org
412-538-0003	301-301-0000	mary@lcg.com
408-555-0000		mmedgaus@abreon.com
212-533-0000		steve@reich.com
301-555-1212		homerj@snpp.com
240-283-0000		
412-538-0000		
212-555-0000		
455-555-1212	333-555-6666	

# Managing Alerts Using Outlook

- Outlook can be used to manage your SharePoint alerts.
- Outlook will display ALL alerts across ALL SharePoint sites.

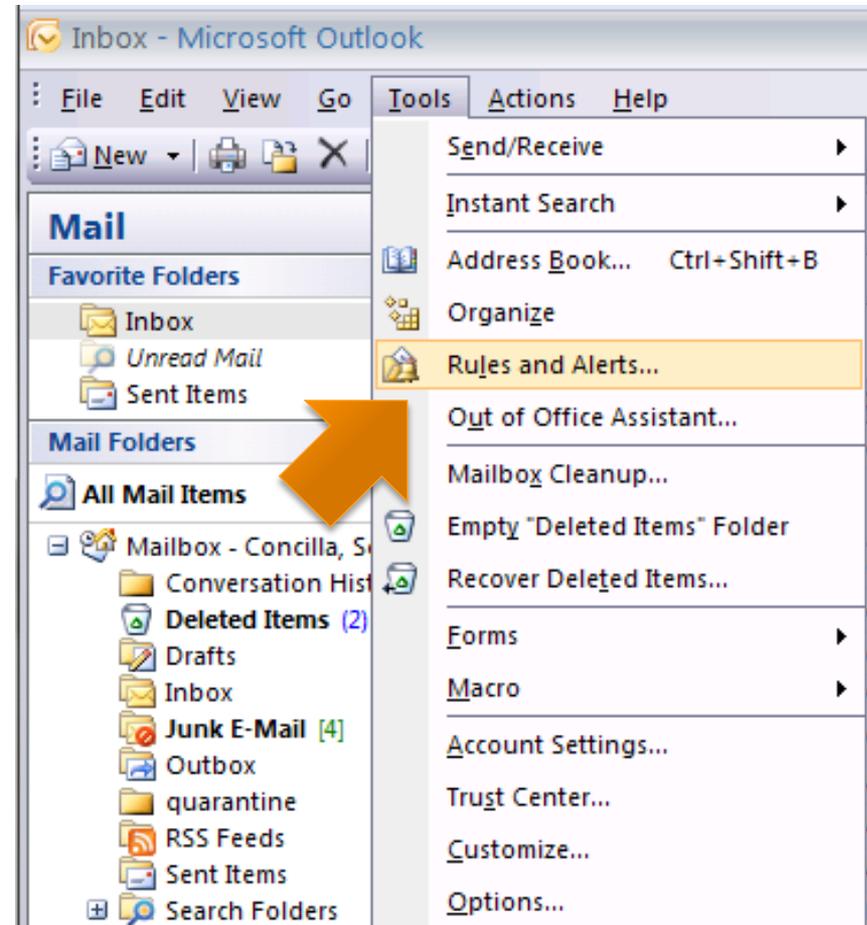


# Managing Alerts in Outlook 2007



## Procedure (2007)

1. In the **Inbox**, select the **Tools** menu and choose **Rules and Alerts**.
2. In the **Rules and Alerts** dialog box, select the **Manage Alerts** tab.
3. Click **OK** when finished.

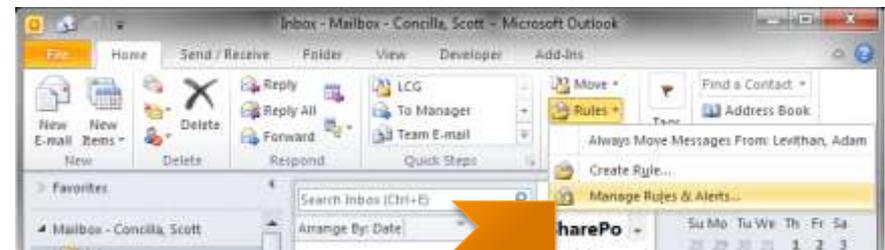


# Managing Alerts in Outlook 2010



## Procedure (2010)

1. In the **Inbox**, on the **Home** tab, in the **Move** group, click the **Rules** button and choose **Manage Rules & Alerts**.
2. In the **Rules and Alerts** dialog box, select the **Manage Alerts** tab.

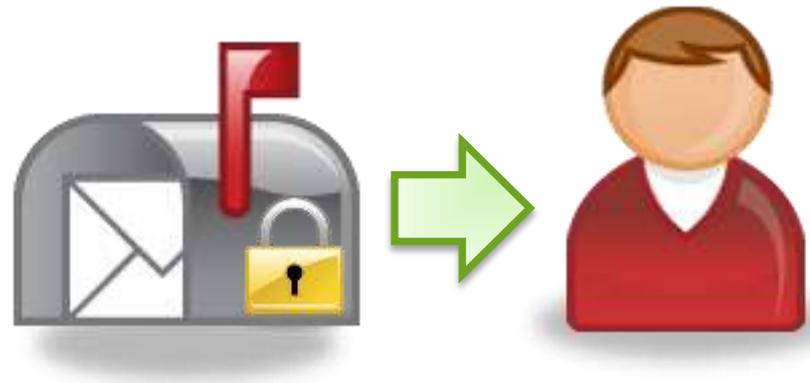


# E-mailing Links

- Using E-mail to Share Links
- E-mailing a Link to a List

# Using E-mail to Share Links

- Instead of giving a user “detailed instructions” on how to find a list, send a link in an e-mail.
- E-mailed links are subject to permissions.
  - The link will not work if the receiving user does not have permission to access the list.

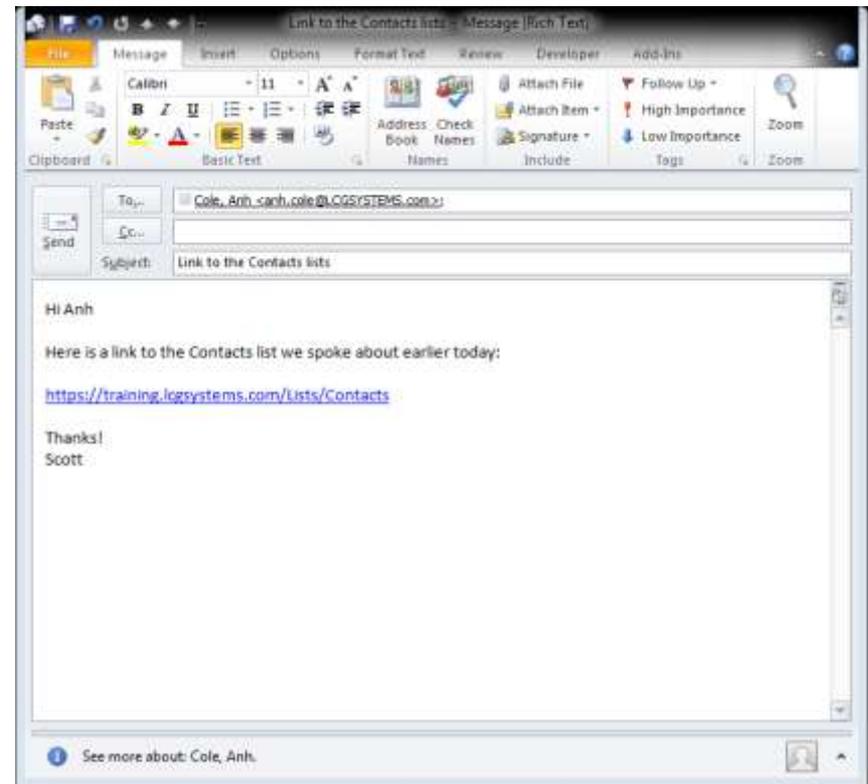


# E-mailing a Link to a List



## Procedure

1. On the **List** tab, in the **Share & Track** group, click the **E-mail a Link** button.
2. An e-mail will open with a link to the list.
3. Complete the e-mail and **Send** it.



# Additional Help

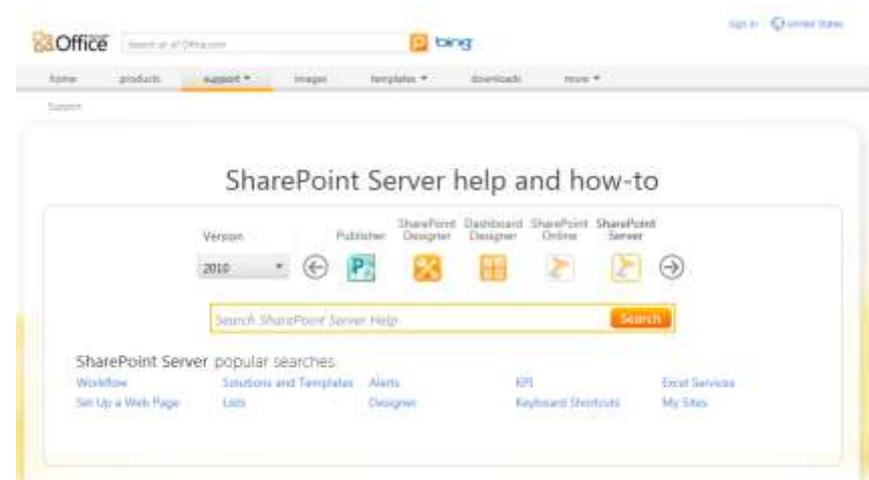
- Microsoft Office Online
- Recommended Books

# Microsoft Office Online



office.microsoft.com

1. Select the **Support** menu and choose **All Support**.
2. Make sure the **Version** drop-down displays **2010**.
3. Use right arrow to scroll and select the **SharePoint Server** icon.



# Recommended Books

- **SharePoint 2010 Plain & Simple**
  - J. Lightfoot and C. Beckett
  - Microsoft Press
- **The SharePoint Shepherd's Guide for End Users**
  - Robert Bogue
- **SharePoint 2010 User's Guide**
  - S. Bates and T. Smith
  - Apress
- **SharePoint Foundation 2010**
  - O. Londer and P. Coventry
  - Microsoft Press

