SharePoint 2016 End User Training

with examples and
hands-on exercises

WEBUCATOR

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The Author

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Class Files

Download the class files used in this manual at https://static.webucator.com/media/public/materials/classfiles/SHP2016.1-1.1.1.zip.

Errata

Corrections to errors in the manual can be found at https://www.webucator.com/books/errata/.

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LESSON 1

SharePoint 2016 Introduction

Topics Covered

☑ Versions of SharePoint.

☑ SharePoint site hierarchy.

☑ Team Site layout.

☑ Navigation within a Team Site.

Introduction

SharePoint 2016 is a collaboration tool at its heart. Its primary goal is to make it easy for users to find and share information, and there are many features built into SharePoint to facilitate this. SharePoint's library system feature can provide a superior alternative to the traditional file server. SharePoint lists can be an easy-to-design and easy-to-use alternative to sharing spreadsheet files or more formal database tables. Both lists and libraries can be customized and extended to provide enhanced appearances and functionality, such as calendars and discussion boards, to name a couple. All of this collaboration can be done through a browser interface and in some cases through integration with Microsoft Office applications.

1.1. SharePoint Versions

SharePoint 2016 is available in two on-premise versions in addition to packages hosted by Microsoft. This course will focus on the on-premise versions of SharePoint but the concepts are applicable to SharePoint Online. The on-premise versions of SharePoint 2016 are Standard and Enterprise. The differences between the two versions are based on the features they offer.

Free Foundation Version Discontinued
Note that the free Foundation version of SharePoint that was available with earlier versions of SharePoint is not offered with the 2016 version.

Standard offers the core features of SharePoint. Enterprise has additional feature added than what comes with Standard, the following is a list of some of those features, note that this is not a complete list.

- Access Services
- InfoPath Forms Services
- eDiscovery Hold
- eDiscovery Export
- Preservation hold library
- Video Search
- WCM: Catalog
- WCM: Search web parts
- WCM: Cross-Site Publishing
- WCM: Faceted navigation
- Business Intelligence Center
- PerformancePoint Services
- Visio Services

The scope of this course is for the “end user” and most of the features that fall within that scope come with the Standard version of SharePoint 2016.

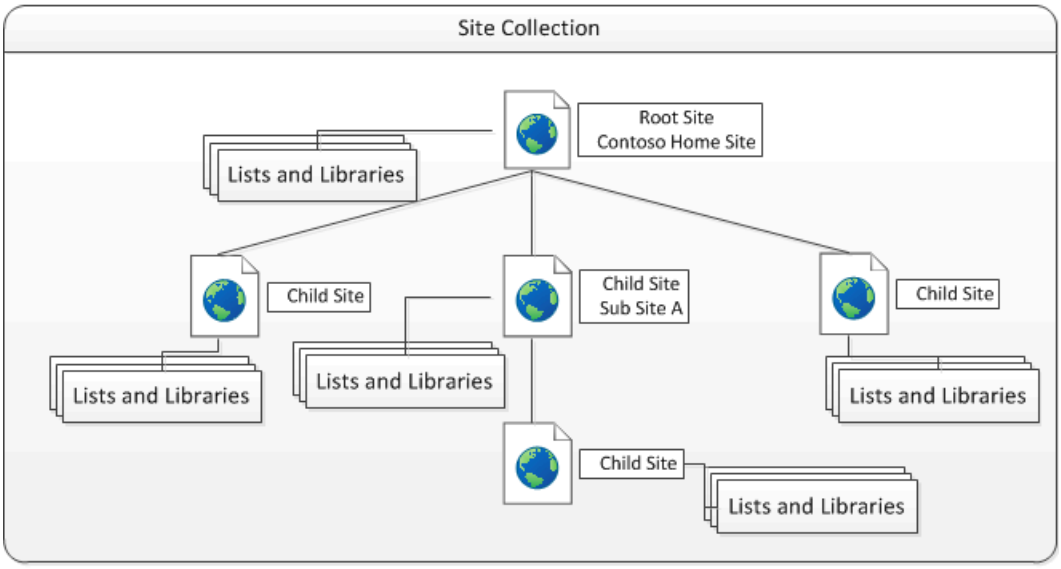
1.2. Team Site Layout and Navigation

❖ 1.2.1. Layout

SharePoint sites are part of a hierarchy that is grouped in a Site Collection. There is always one site that is the root site of the Site Collection but below that site can be many child sites. Lists and Libraries can be created within each site in the Site Collection. The Site Collection defines the basic storage as well as administration and permissions. In a later

lesson in this course, you will explore the basic permissions and how they are applied to each site within the Site Collection as well as each list and library.

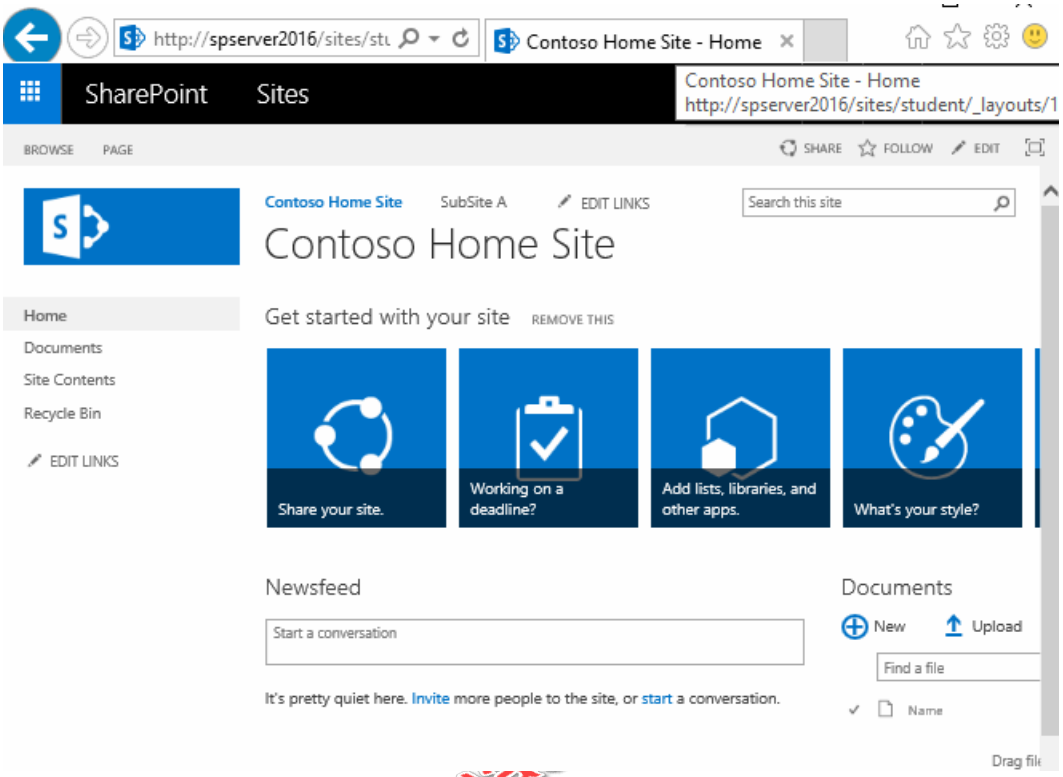
The following diagram illustrates a conceptual view of how sites might be organized in a Site Collection. Note that the presentations in this course use a root site named **Contoso Home Site** with a single child site named **Sub Site A.**



❖ 1.2.2. Navigation

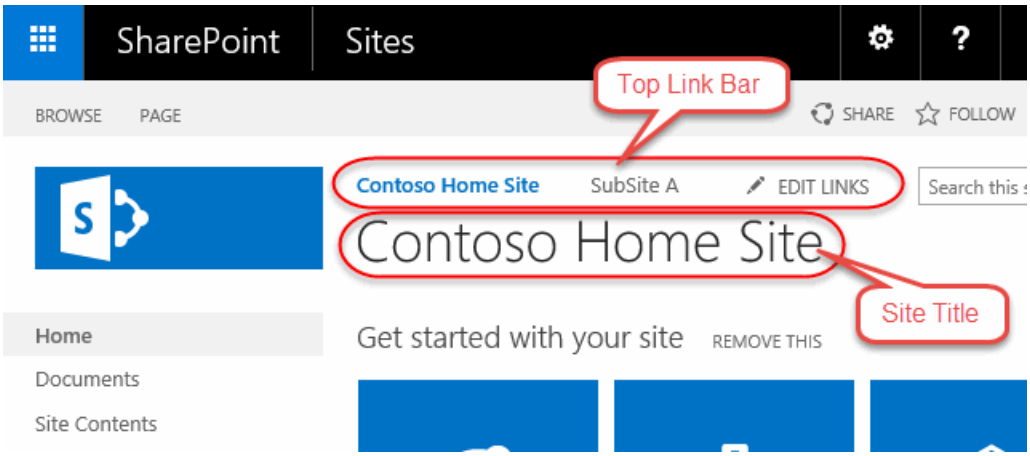
Navigation is a crucial part of using and managing SharePoint. The following walk-through, will navigate the root Team Site named **Contoso Home Site** as well as its single child site **Sub Site A**. The walk-through will highlight different menus and navigation links shared by all the pages in a SharePoint site.

1. Navigate to your team site.
    A. Launch whatever browser you prefer; the examples in this course use Internet Explorer.
    B. Type the address of your team site; the examples in this course use `http://spserver2016/sites/student`.
    C. The home page of your team site should look similar to the following:



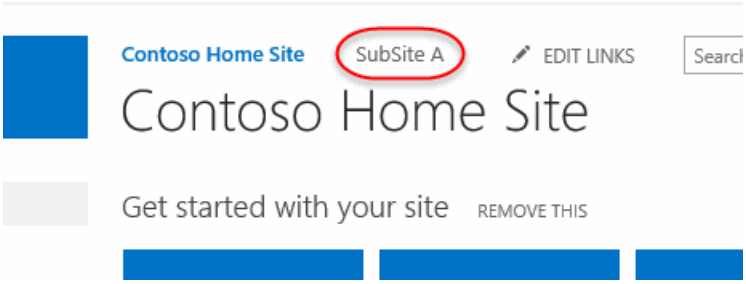
2. Navigate using the Top Link Bar.

   A. The site you are located in can be verified by the **Title**:



   The title of the walk-through site is **Contoso Home Site** and the **Home** tab is shaded in the Top Link Bar of the site.

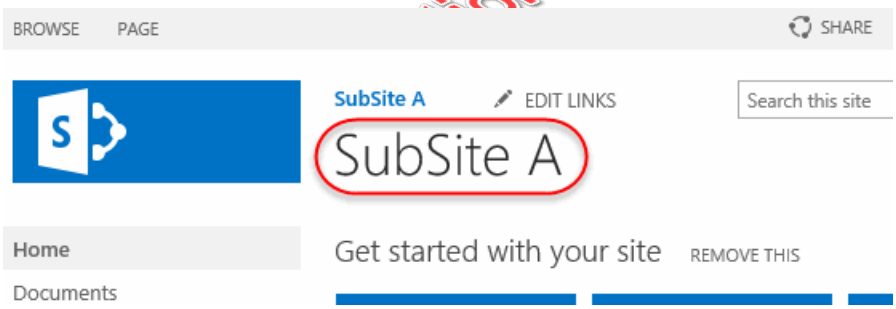
   B. Click the **SubSite A** link in the site's **Top Link Bar** to navigate to the home page of the child site.



Top Link Bar Links

Note that links in the **Top Link Bar** are not necessarily child sites, they can be links that have been manually created and that navigate to pages within the root site. The default behavior when adding a new child site to a parent site is to add a link to the **Top Link Bar** of the parent site.

C. Note how the **Title** of the child site is shown in the following image.

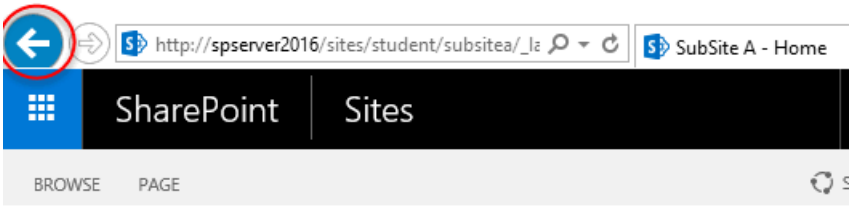


Note

Sometimes it can be hard to tell that you are on a different site. In this walk-through both sites' home pages and Quick Launch menus are based on the same Team Site templates, and neither have had any customizations performed on them. The only visual differences at this point are the titles **Sub Site A** and **Contoso Home Site**, and Sub Site A only has the **Home** link in its Top Link Bar because it does not yet have any child sites. In a later part of this course, you will learn how modify the content of pages such as the home page. You will also be adding content to the site that will automatically change the Quick Launch menu.

3. Navigate back to the parent site.

   A. Use the **Back** button of your browser to navigate back to the parent site.

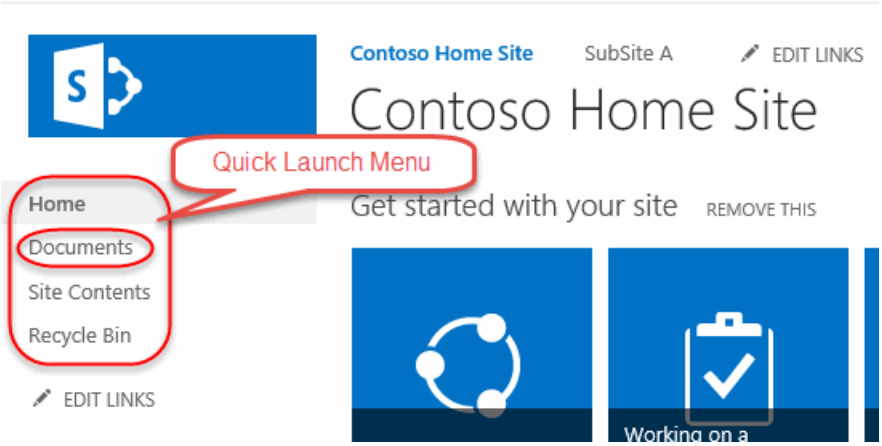


Looking Forward

In a later part of this course, you will learn how to configure child sites to use the same **Top Link Bar** as their parent site as well as how to add custom links.

4. Navigate using the Quick Launch menu.

   A. Select the **Documents** inside the Quick Launch menu located on the left side of the page.



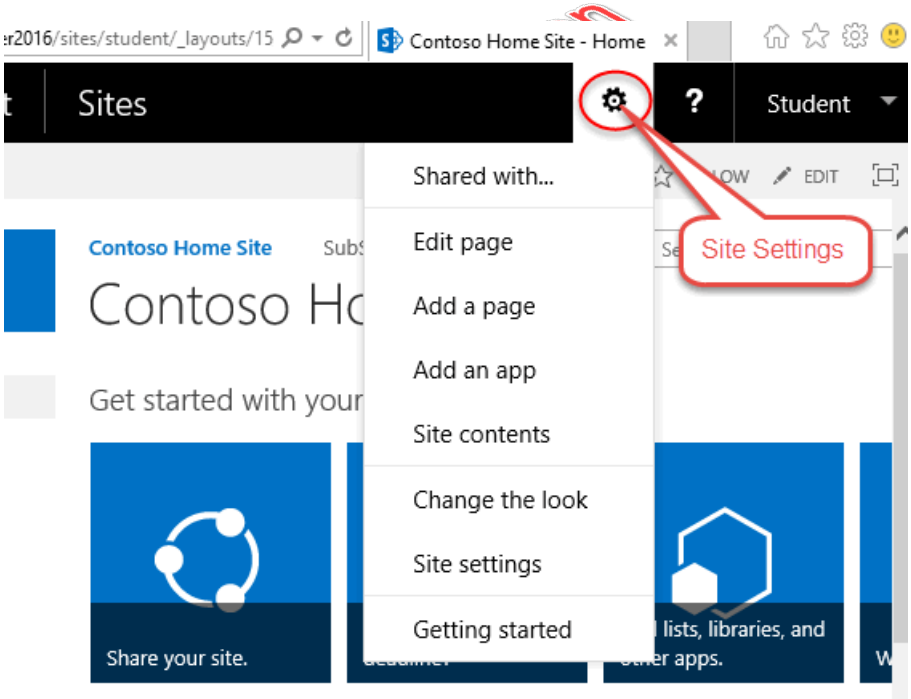
   B. Navigate back to the home page of the site by clicking the **Home** link within the **Quick Launch** menu.

Looking Forward

In later parts of this course, you will learn how to create lists and libraries as well as other items that will automatically add links to the Quick Launch menu. You will also explore how to customize the Quick Launch menu manually.

5. Navigate using the **Settings** menu.

   A. Click the **Settings** menu icon located at the top right of your Team Site.



   B. Take a few moments to read through the list of links in the **Settings** menu. The items you see in the list reflect who you are logged into the site as. The list uses security trimming to show only items that you have permission to use.

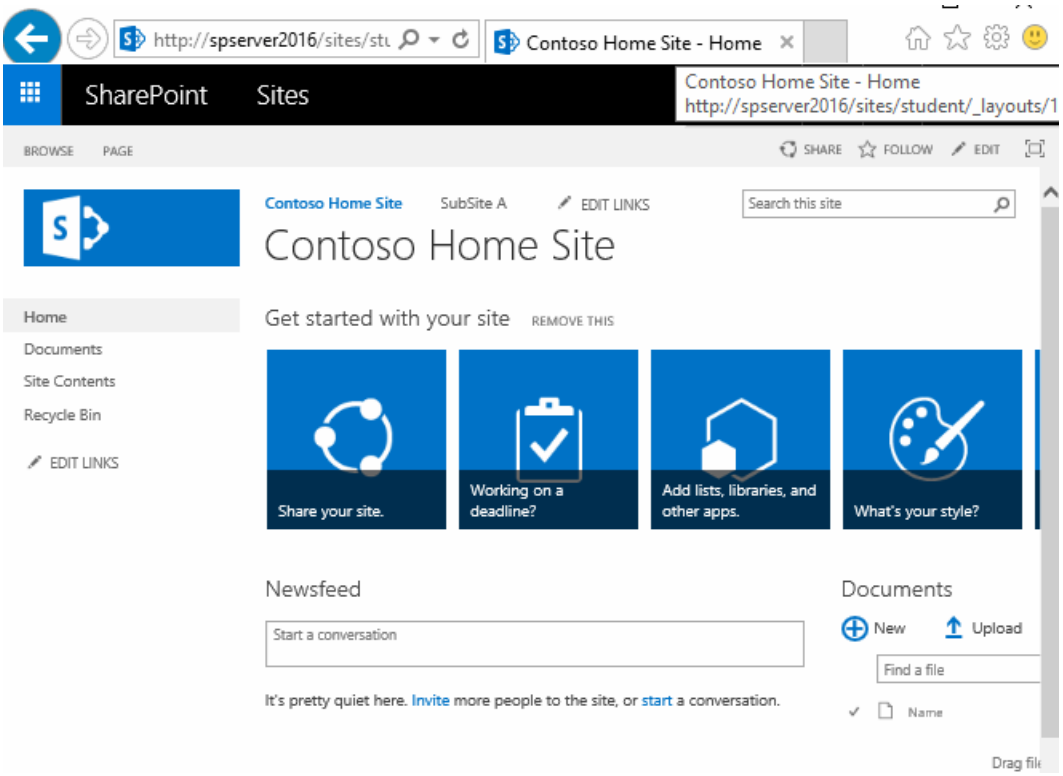
Looking Forward
In a later part of this course, you will learn how to assign permissions.

Exercise 1: Team Site Navigation

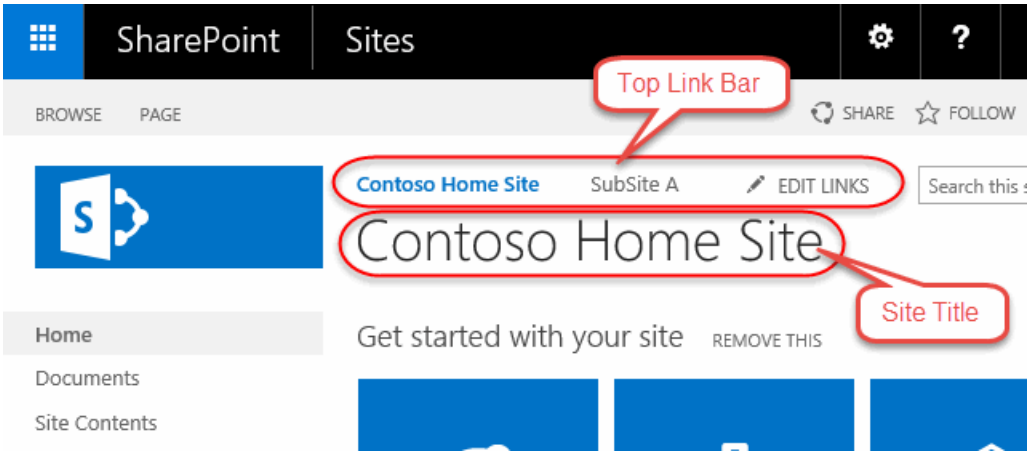
15 to 25 minutes

In this exercise, you will learn to navigate a basic SharePoint 2016 Team Site.

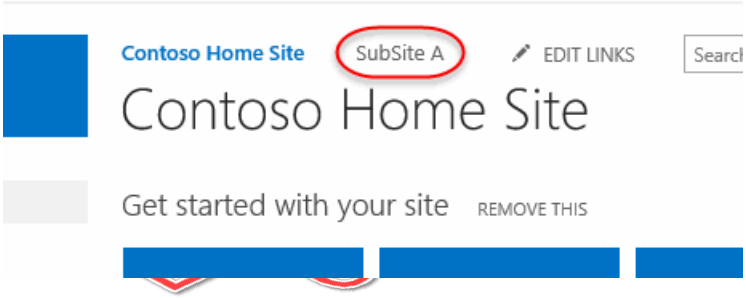
1. Navigate to your team site.
   A. Launch Internet Explorer.
   B. In the address field, enter the address: **http://spserver2016/sites/student**.
   C. The home page for your team site will load and look similar to the following:



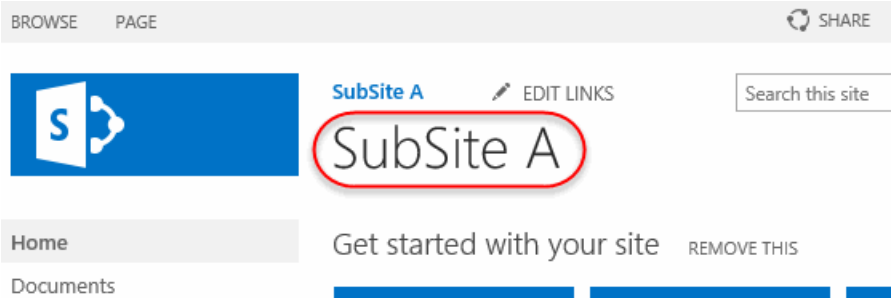
2. Navigate using the Top Link Bar.
   A. Verify that you are currently located on the home page of your Team Site, the **Contoso Home Site** link should be shaded blue in the Top Link Bar of the site.



B. Click the link of a child site such as **SubSite A** located in the site's Top Link Bar.



C. Verify that you are now located on the home page of the child site by checking the **Title** displayed for the site.

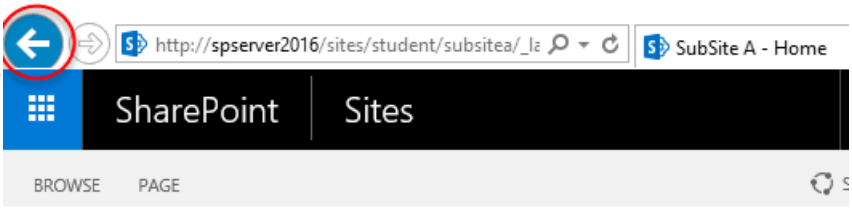


Note

It might be hard to tell that you are on a different site. Both sites' home pages and Quick Launch menus are could be based on the same Team Site templates, and you have not made any customizations to either. The only visual differences at this point are

the titles such as **SubSite A** and **Contoso Home Site** in the screen captures, and in the example Sub Site A only has its title link in the Top Link Bar because it does not as of yet have any child sites. In a later part of this course, you will modify the content of pages such as the home page. You will also be adding content to the site that will automatically change the Quick Launch menu.

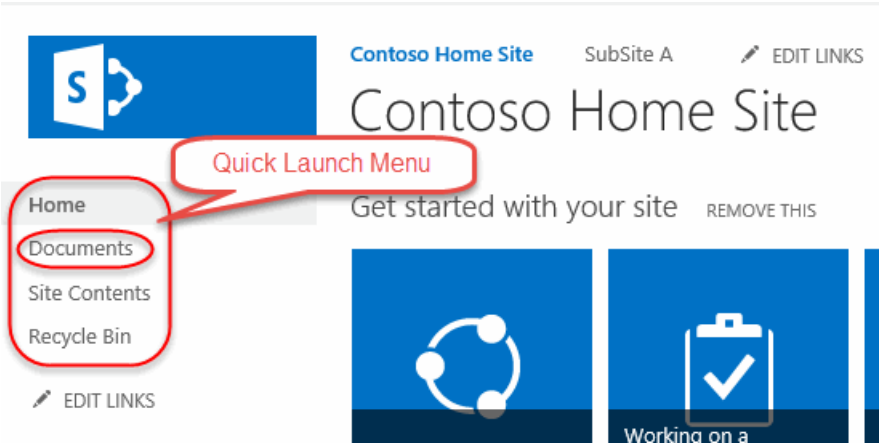
3. Navigate back to the parent site.
   A. Use the **Back** button of your browser to navigate back to the parent site.



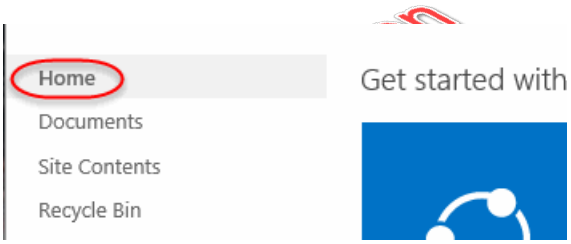
Looking Forward

In a later part of this course, you will learn how to configure child sites to use the same **Top Link Bar** as their parent site as well as how to add custom links.

4. Navigate using the Quick Launch menu.
   A. Select the **Documents** inside the Quick Launch menu located on the left side of the page.



B. Navigate back to the home page of the site by clicking the **Home** link within the **Quick Launch** menu.

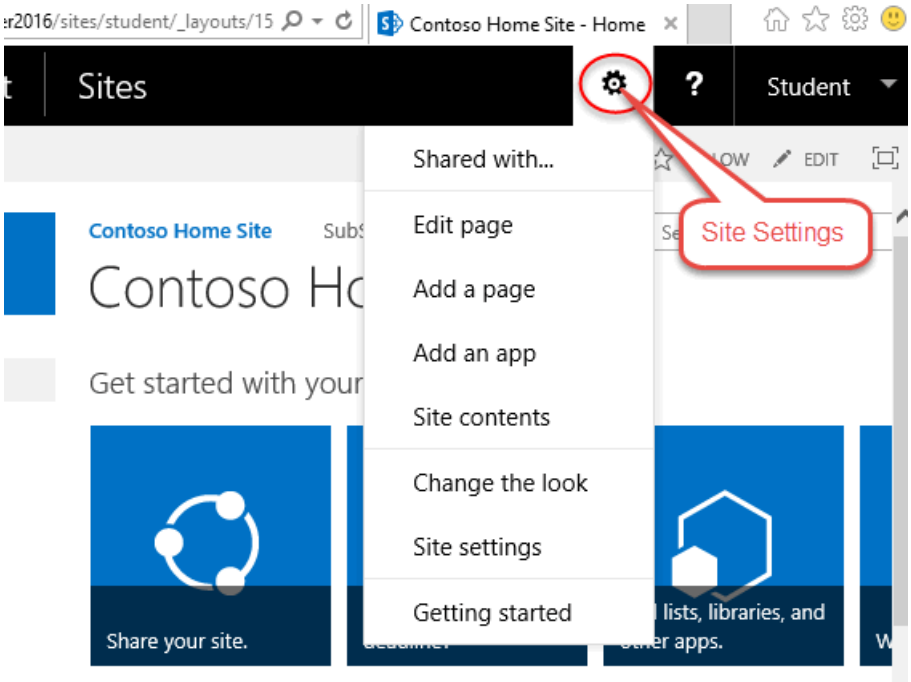


Looking Forward

In later parts of this course, you will learn how to create lists and libraries as well as other items that will automatically add links to the Quick Launch menu. You will also explore how to customize the Quick Launch menu manually.

5. Navigate using the **Settings** menu.

   A. Click the **Settings** menu icon located at the top right of your Team Site.



B. Take a few moments to read through the list of links in the **Settings** menu. The items you see in the list reflect who you are logged into the site as. The list uses security trimming to show only items that you have permission to use.

Looking Forward
In a later part of this course, you will learn how to assign permissions.

Conclusion

In this lesson, you have learned:

- About the different versions SharePoint offers.
- About the basic hierarchy of a Site Collection.
- About the basic menus and toolbars in a Team Site.
- How to navigate within a Team Site.

LESSON 2
SharePoint List Basics

Topics Covered

☑ About List Templates.

☑ Working with default lists in a Team Site.

☑ Creating a new list from a List Template.

☑ Creating a custom list.

☑ Adding columns to a list.

☑ Controlling and validating input into list fields.

☑ Linking data from separate lists.

Introduction

Lists are a fundamental building block in SharePoint that provides a way for users to store and view data. SharePoint comes “out of the box” with many predefined list templates that are easy to use. Lists can be further customized by adding columns to store just about any type of information. Additionally, list columns can be validated as well as linked between other lists. Lists are a very flexible and powerful tool in SharePoint.

2.1. Creating Apps Using List Templates

In SharePoint 2016, lists are created by creating Apps. The out-of-the-box Apps you can create include both lists and libraries. The primary difference between lists and libraries is that libraries always store a document with each item, such as a Word document or Excel spreadsheet. Libraries will be covered in a separate lesson in this course.

To create a list App you first select a list template as a starting point for your list. List templates define the characteristics of a list when used to create a new list. The characteristics defined by list templates include the column types, views, and forms for editing and viewing list data.

There are many factors that define the list templates available to a site such as the version of SharePoint and the features that have been enabled in the farm, site, and site collection. New list templates can be easily added to a site so the list templates choices can vary between different SharePoint installations and even sites within a single installation.

The following is a list of some of the default list templates available in an out-of-the-box SharePoint team site.

- Links
- Announcements
- Contacts
- Calendar
- Discussion Board
- Promoted Links
- Tasks
- Issue Tracking
- Custom List
- External List
- Survey

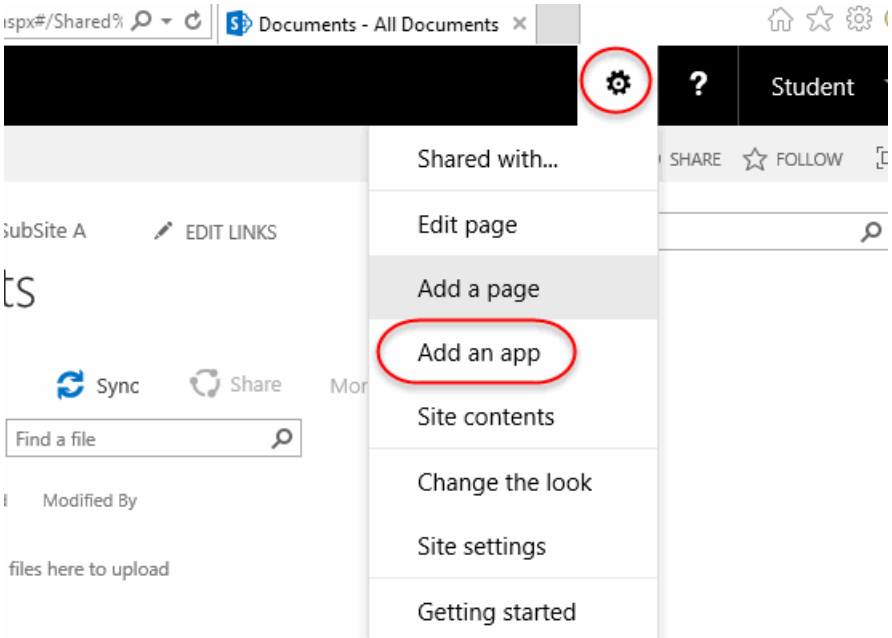
2.2. Creating Lists

❖ 2.2.1. Creating Lists Using List Templates

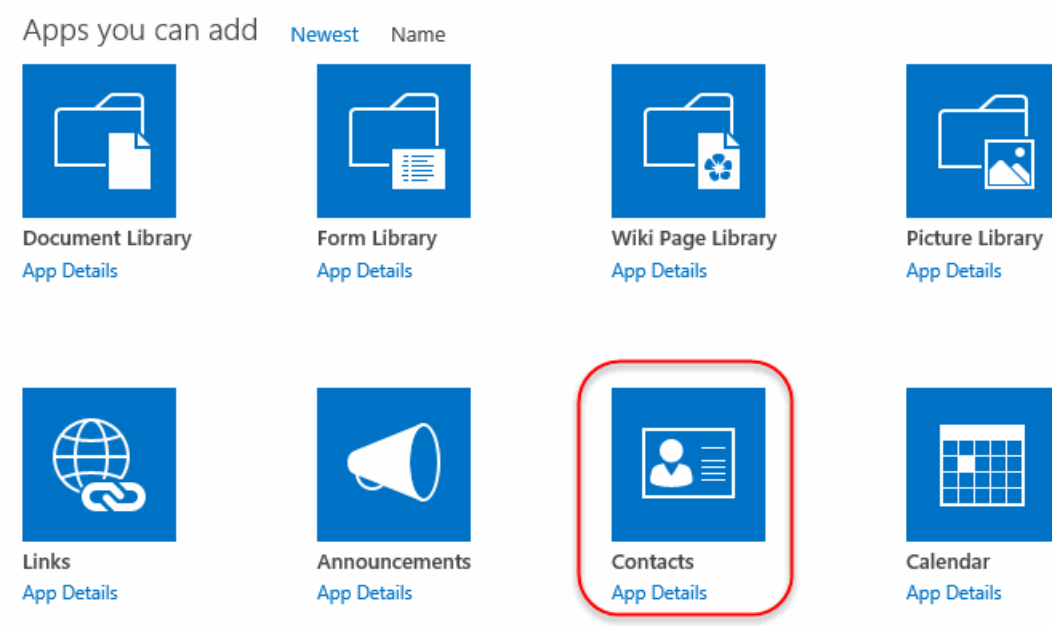
The following walk-through will show you how to create new lists using some of the standard out-of-the-box list templates.

All of the lists in this demonstration are created in the **Contoso Home Site**.

1. Create an instance of a **Contacts** list.
    A. Click the **Settings** menu and then choose the **Add an app** menu item.



B. Scroll down the list of Apps templates and locate and click the **Contacts** template link.

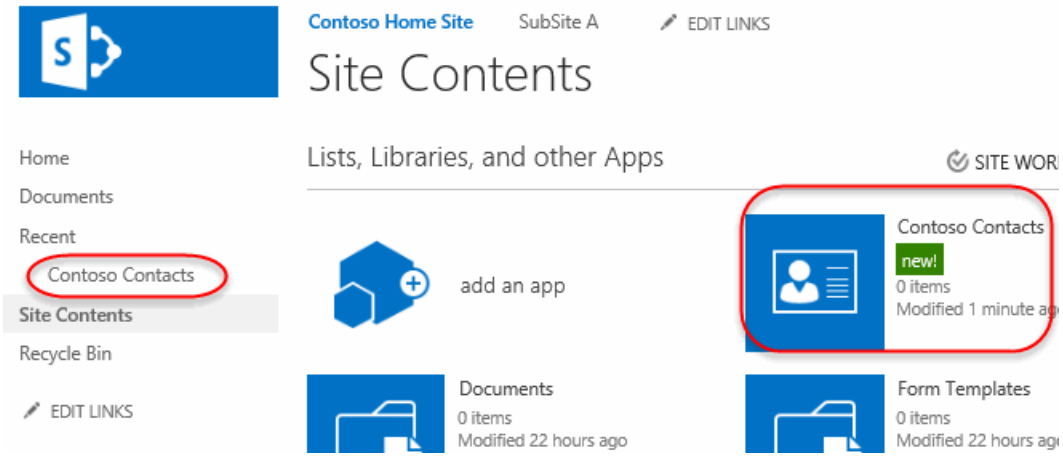


C. Enter “Contoso Contacts” in the **Name** field and click the **Create** button.

Naming Conventions

Many website administrators feel strongly about not using spaces when naming a list, library, or new site. The reason for this is that the spaces will be replaced with "'%20" characters in the URL. This can make the URL difficult to read and links can become convoluted. The title of the list, library, or site can always be changed after they are created using the properties pages that will be covered in a later part of this course. This will change what is displayed but not affect the URL. For simplicity and readability, the exercises and walk-throughs in this course often include the space in the name and accept the fact that the URL will have the "%20" replacement characters.

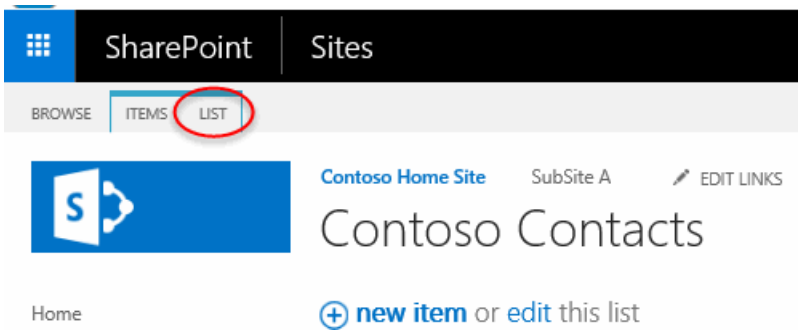
D. Note that **Contoso Contacts** are now displayed in the **Quick Launch** menu under the **Recent** heading as well as listed on the **Site Contents** page.



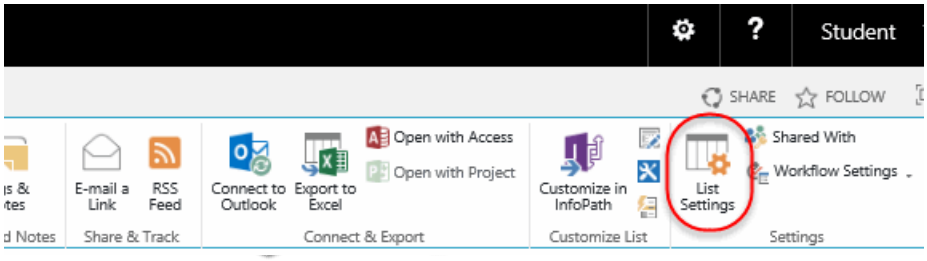
2. Add a permanent link to **Contoso Contacts** in the **Quick Launch** menu.

   A. Click the **Contoso Contacts** link under the **Recent** heading in the **Quick Launch** menu.

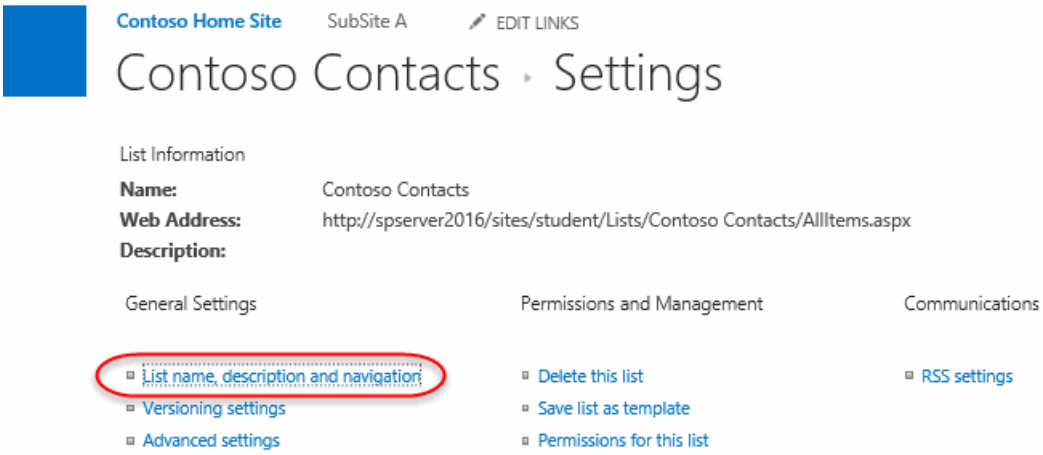
   B. Click the **List** tab to navigate to the **List Toolbar**.



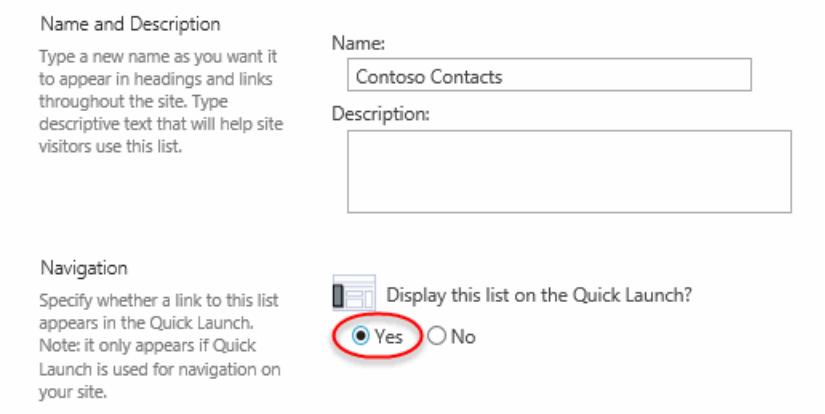
   C. Click the **List Settings** link button on the **List** tab toolbar.



   D. Click the **List name, description and navigation** link on the list settings page.



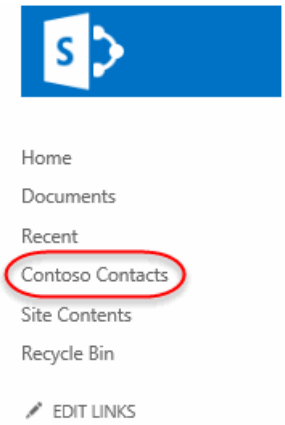
   E. Click the **Yes** radio button to add **Contoso Contacts** to the site's **Quick Launch** menu and click the **Save** button.



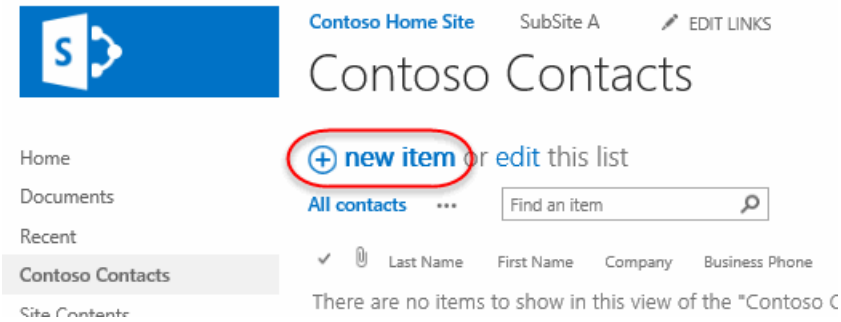
Note

The **Name** field is where you would change the name of the list or library without affecting the URL.

F. Note that **Contoso Contacts** now shows on the site's **Quick Launch** menu as a root-level item.



3. Create a new contact item in the **Contoso Contacts** list.
   A. Click the **Contoso Contacts** link in the **Quick Launch** menu.
   B. Click the **new item** link within the **Contoso Contacts** list.

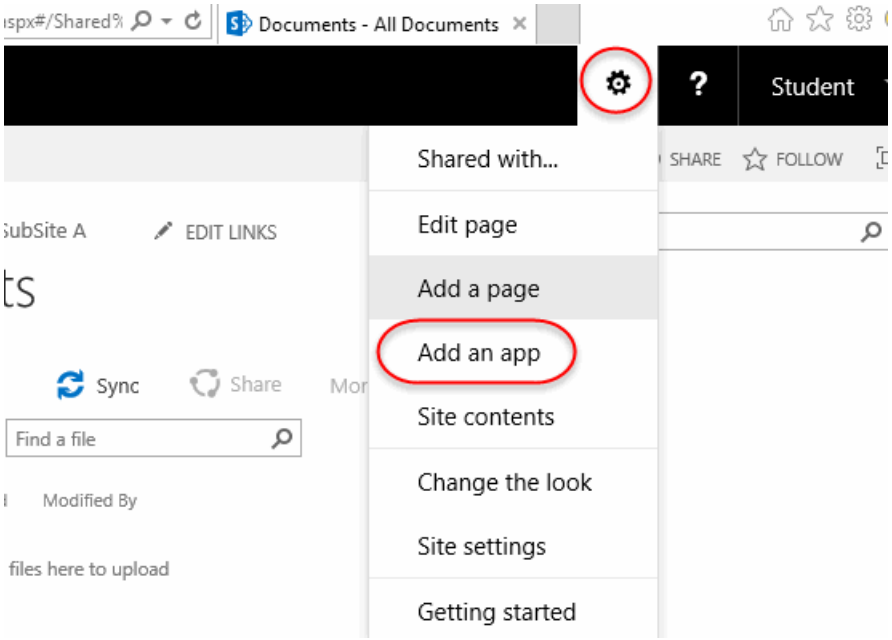


C. In the **Contoso Contacts - New Item** form, use the following table to fill in the fields and click the **Save** button. Note that only the **Last Name** field is required.

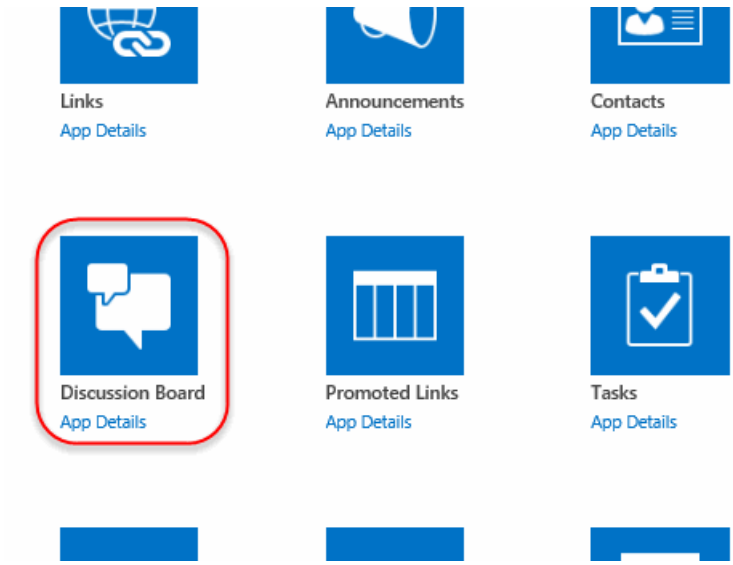
Field	Data
Last Name	Simpson
First Name	Marge
Full Name	Marge Simpson
Email Address	Marge@Contoso.com
Company	Contoso

4. Create an instance of a **Discussion Board** list.

   A. Click the **Settings** menu and then choose the **Add an app** menu item.



B. Scroll down the list of Apps templates and locate and click the **Discussion Board** template link.

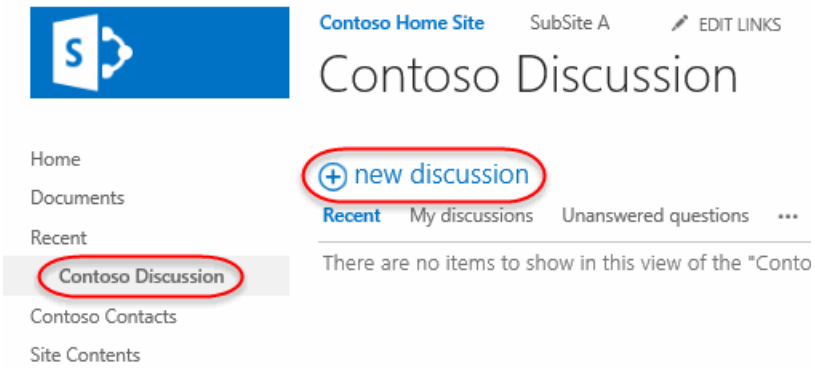


C. Enter "Contoso Discussion" in the **Name** field and then click the **Create** button.

D. Note that you could optionally add **Contoso Discussion** as a permanent link in the **Quick Launch** menu as you did with **Contoso Contacts**.

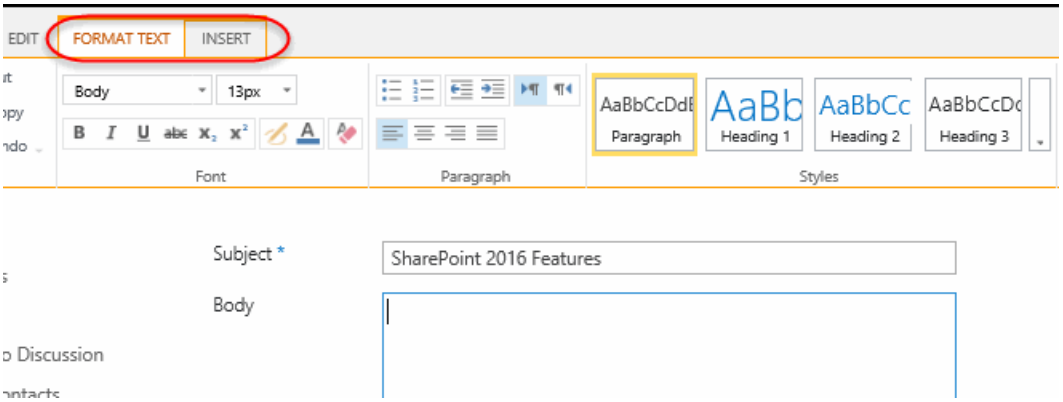
5. Create a new discussion in the **Contoso Discussion** list.

A. Click the **Contoso Discussion** link in the **Quick Launch** menu and click the **new discussion** link in the main view of the list.



B. In the new discussion form, enter "SharePoint 2016 Features" for the **Subject** field.

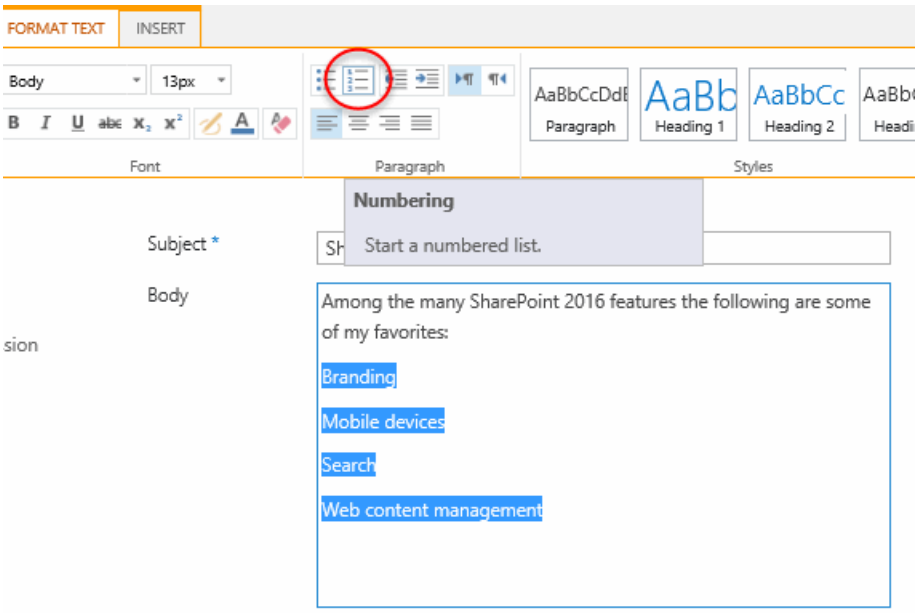
C. Click inside the **Body** field. Note that the discussion form now has a toolbar at the top with two tabs **Format Text** and **Insert**.



D. Inside the **Body** field type the following text:

```
Among the many SharePoint 2016 features the following are some of my fa ↵↵
vorites:
Branding
Mobile devices
Search
Web content management
```


E. Highlight the list text **Branding**, **Mobile devices**, **Search**, and **Web content management** and then click the **Numbering** icon on the **Editing Tools** **Format Text** tab toolbar.



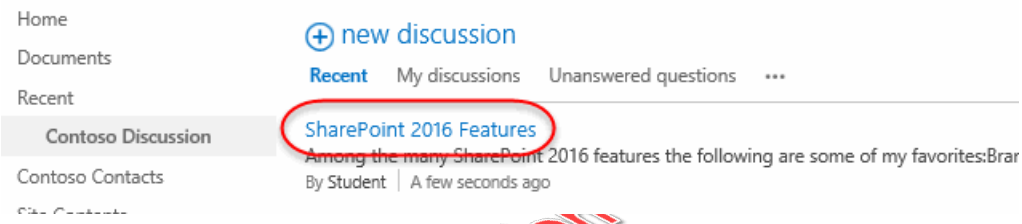
Question Check Box

Note the **Question** check box. When this is checked, it is used as a filter for an **Unanswered Questions** view. Views will be covered in a later part of this course.

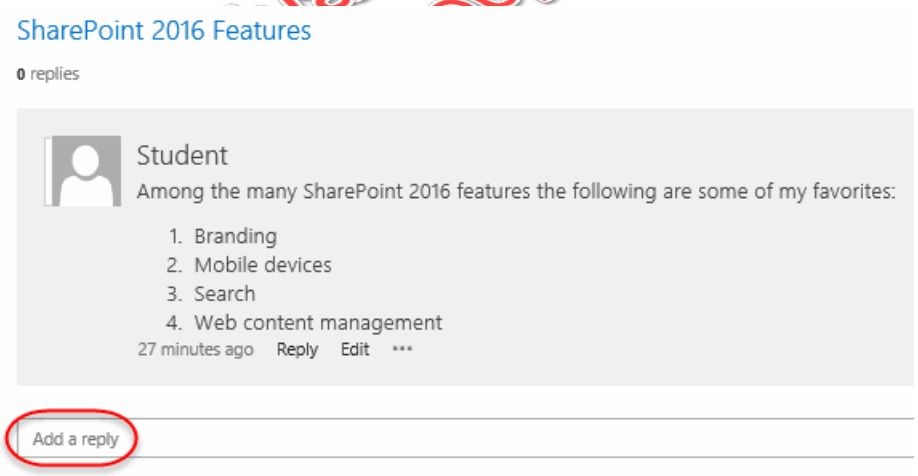
F. Click the **Save** button to save it to the list.

6. Read and reply to the new discussion in the **Contoso Discussion** board.

   A. Click the new discussion subject **SharePoint 2016 Features** link inside the **Contoso Discussion** list.



   B. Click the **Add a reply** text within the text box to create a reply to this post.



Note

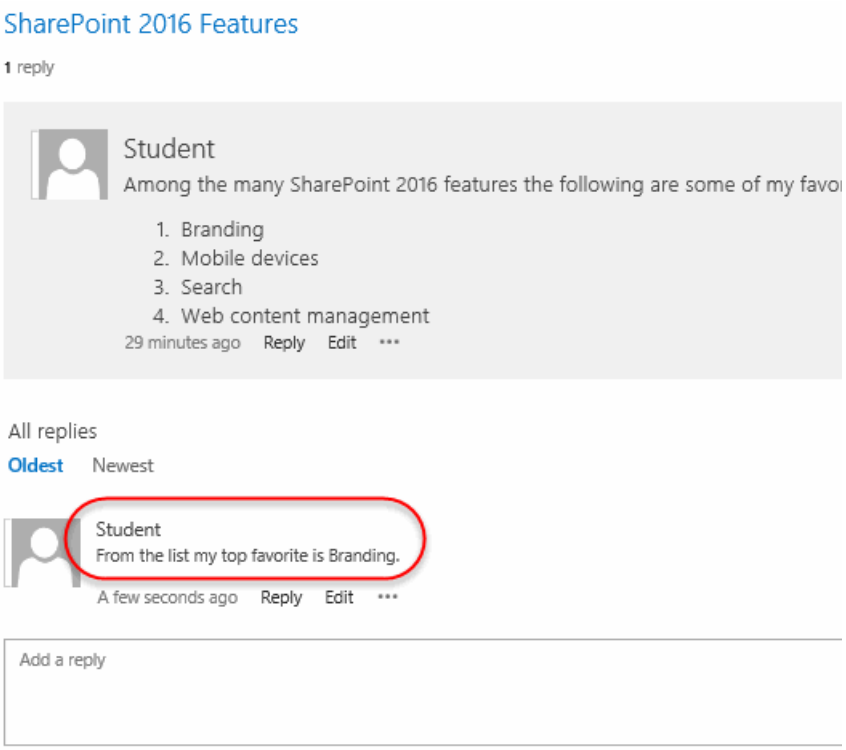
Normally a different user would be replying to a new discussion item, but this walk-through uses a single account.

C. Type the following text in the body of the reply text box and click the **Reply** button:

```
From the list my top favorite is Branding.
```

D. Note that the reply dialog form has the same editing toolbar as when you created the new discussion item.

E. Verify that the reply now displays under the original.



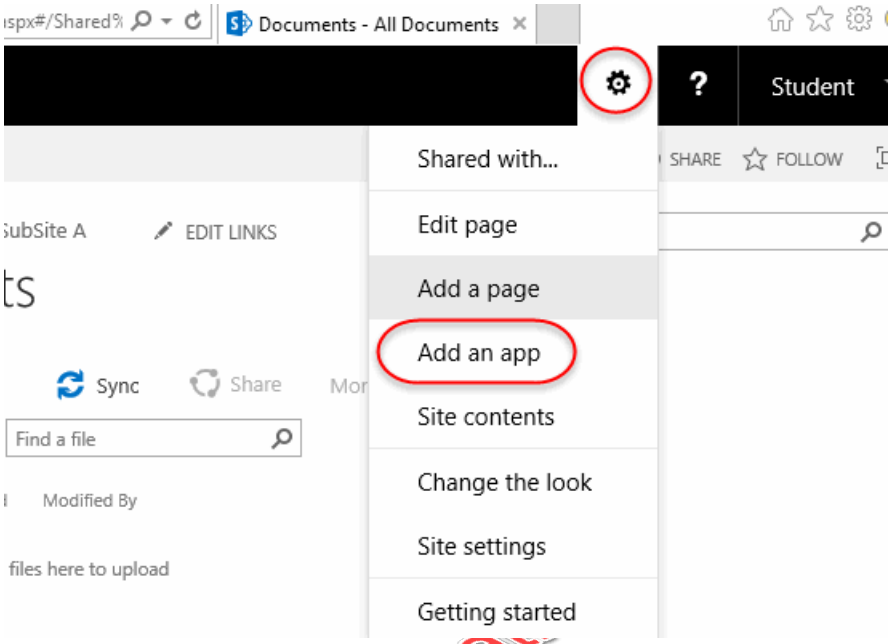
2.3. List Columns

❖ 2.3.1. Creating List Columns

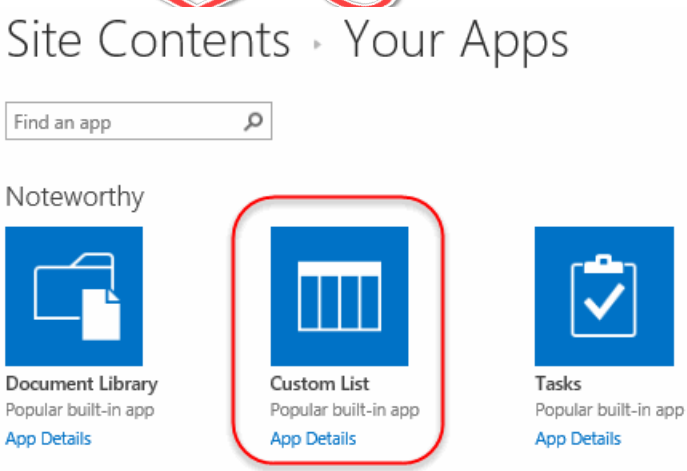
In this walk-through, you will learn to create a new list using the **Custom List** template and add various list columns to it. Although any SharePoint list can have custom columns added to it, the **Custom List** template creates a nice clean list to work with.

1. Create a new list in your Team Site using the **Custom List** template.

   A. Click the **Settings** menu and then choose the **Add an app** menu item.



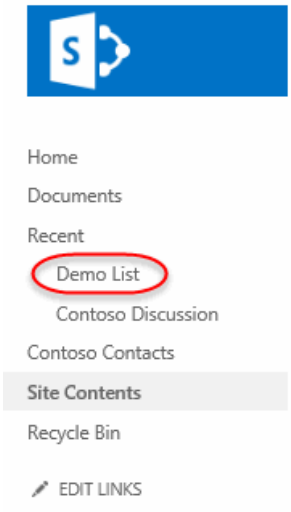
   B. Select the **Custom List** template from the list of available templates.



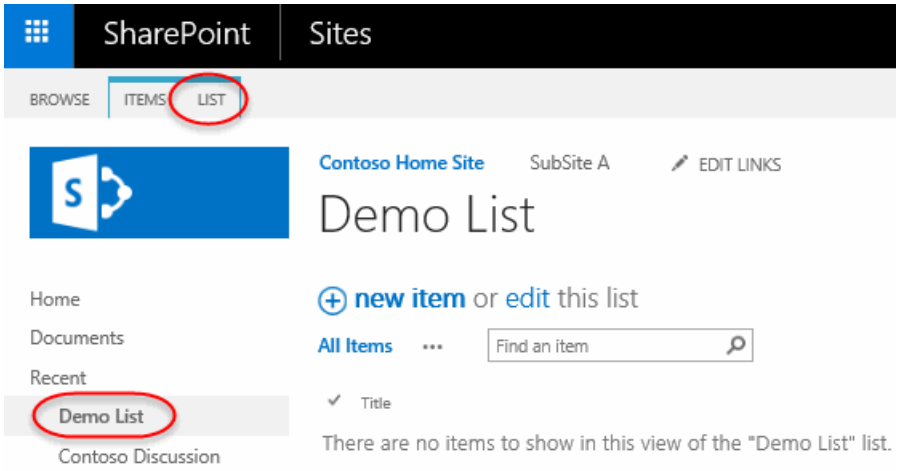
   C. Enter "Demo List" in the **Name** field and then click the **Create** button.

2. Add a new **Single line of text** list column to **Demo List**.

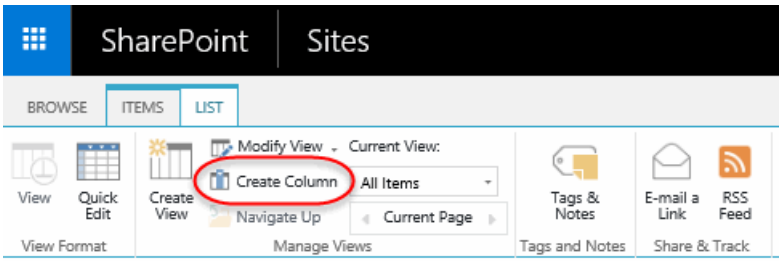
   A. Click the **Demo List** link in the **Quick Launch** menu under the **Recent** group.



B. Click the **List** tab to open the lists toolbar.

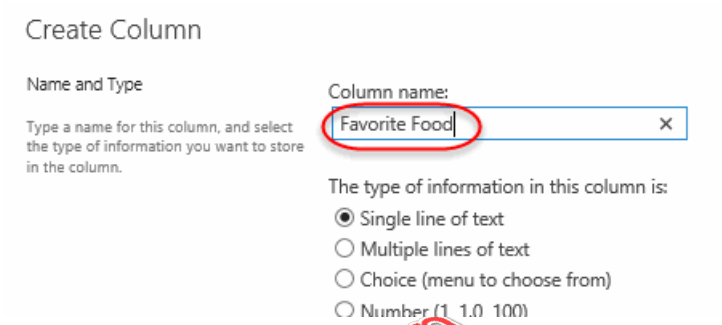


C. Click the **Create Column** button link in the **List** tab toolbar.

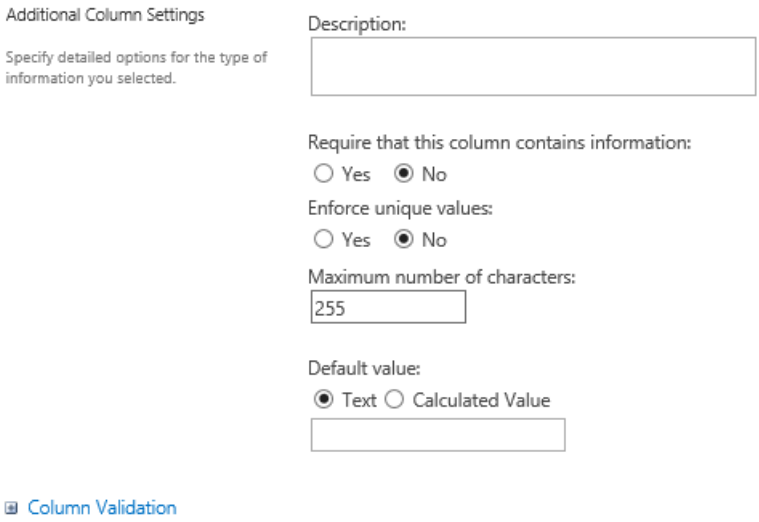


> **Note**
>
> The **Create Column** button might not display the text next to the icon if your browser window is not wide enough.

D. Enter “Favorite Food” in the **Column name** field and leave the default for **The type of information in this column is:** option field set to **Single line of text**.



E. Note the **Additional Column Settings** region that allows you to set options for this **Single line of text** list column. Leave the options set to their defaults and click the **OK** button to complete creating the new list column.

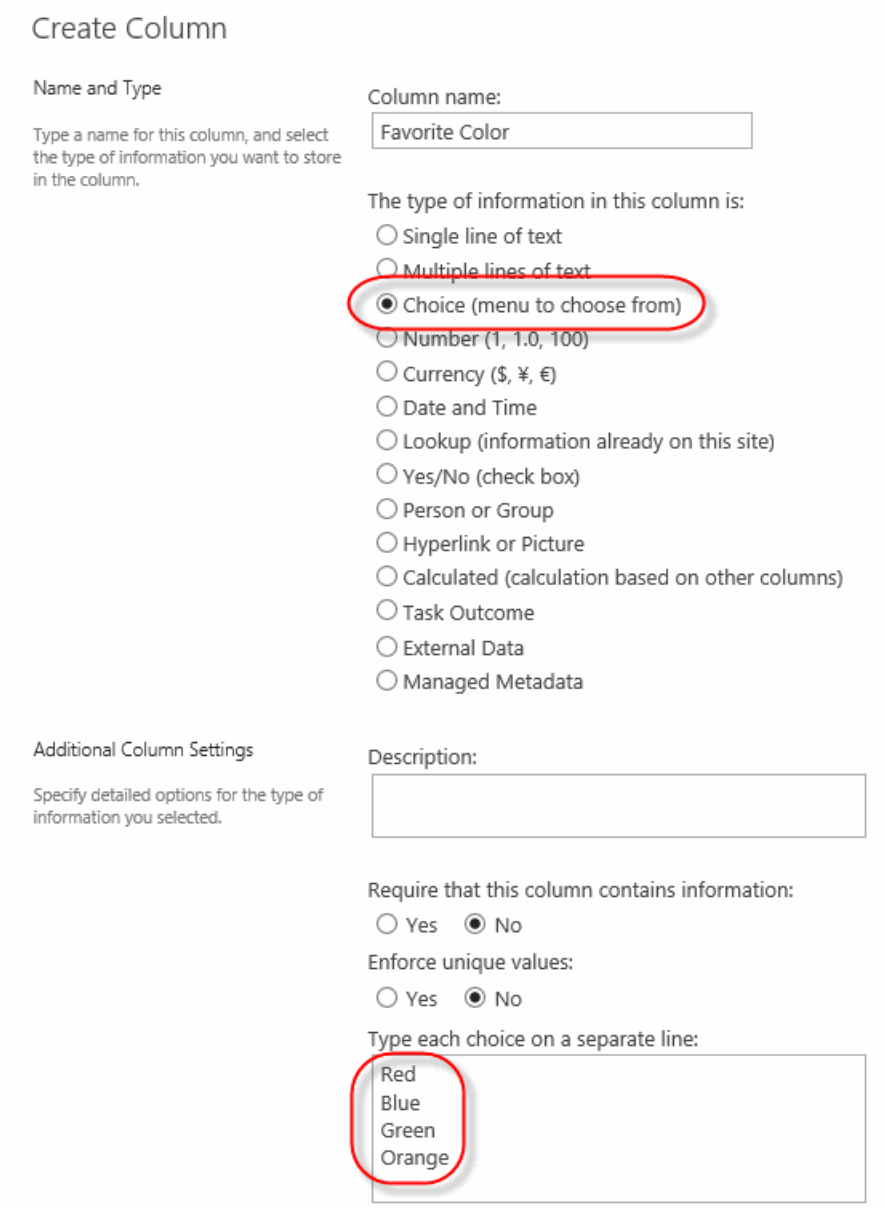


3. Add a new **Choice** list column to **Demo List**.

   A. Click the **Create Column** button link in the **List** tab toolbar.

B. Enter “Favorite Color” in the **Column name** field and change **The type of information in this column is:** option field to **Choice**.

C. In the **Additional Column Settings** region, type some colors into the field labeled **Type each choice on a separate line** and change the **Display choices using** field to **Radio Buttons**. See the following image for some suggested colors to add:



Display choices using Options
Note the **Display choices using** options that include **Radio Buttons** and **Check Boxes**. The check boxes allows for multiple choices and the radio buttons provides an alternative display for single selections. The default **Drop-Down Menu** takes up the least amount of room if the column is included in a view. Views will be covered in a later part of this course.

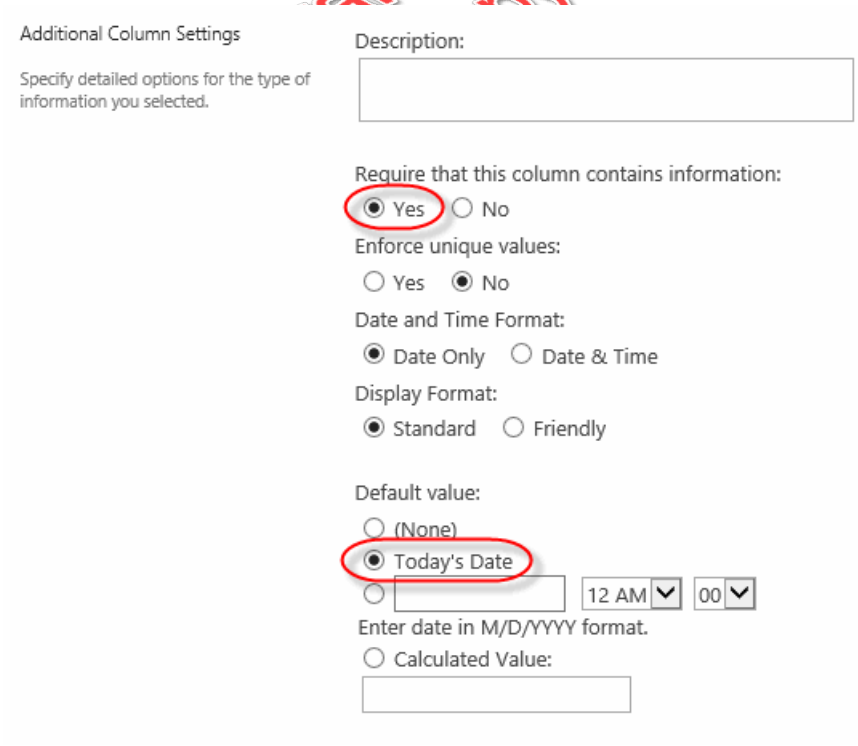
D. Click the **OK** button to complete creating the new list column.

4. Add a new **Date and Time** list column to **Demo List**.

   A. Click the **Create Column** button link in the **List** tab toolbar.

   B. Enter "Birthday" in the **Column name** field and change **The type of information in this column is:** option field to **Date and Time**.

   C. In the **Additional Column Settings** region, change the **Require that this column contains information** option field to **Yes** and the **Default value** option field to **Today's Date**.



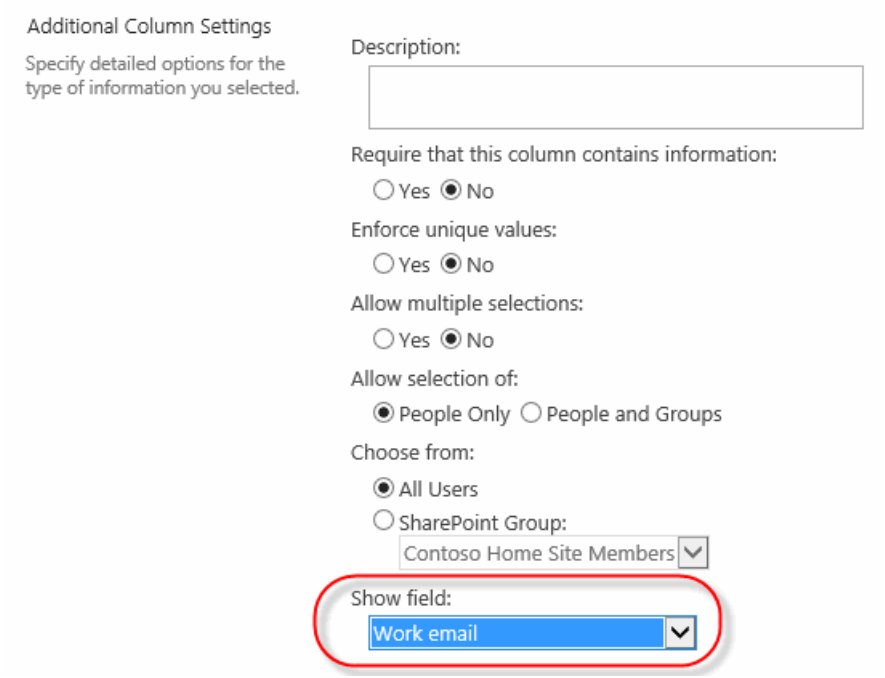
D. Click the **OK** button to complete creating the new list column.

5. Add a new **Person or Group** list column to **Demo List**.

   A. Click the **Create Column** button link in the **List Tools List** tab toolbar.

   B. Enter "Who" in the **Column name** field and change **The type of information in this column is:** option field to **Person or Group**.

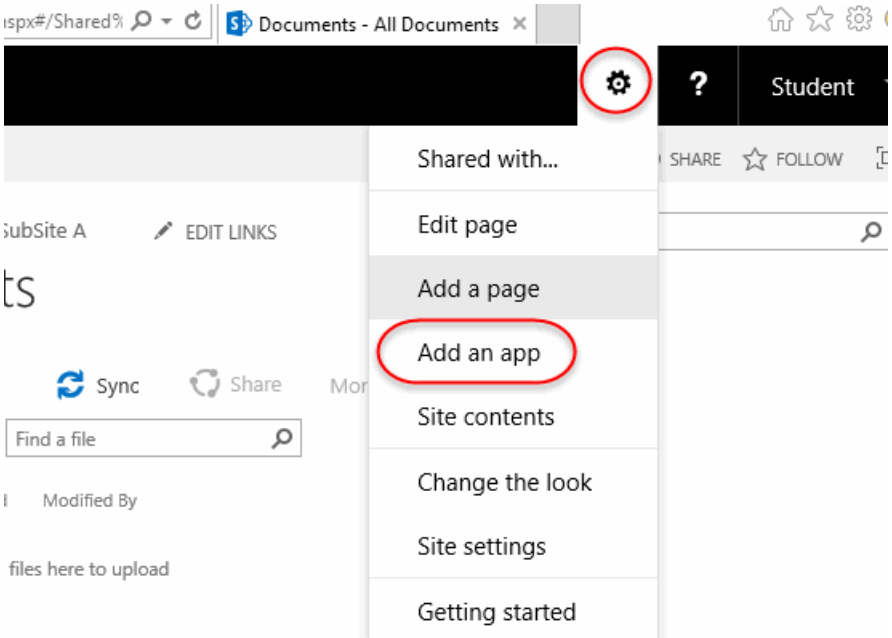
   C. In the **Additional Column Settings** region, change the **Show field** drop-down box to **Work email**.



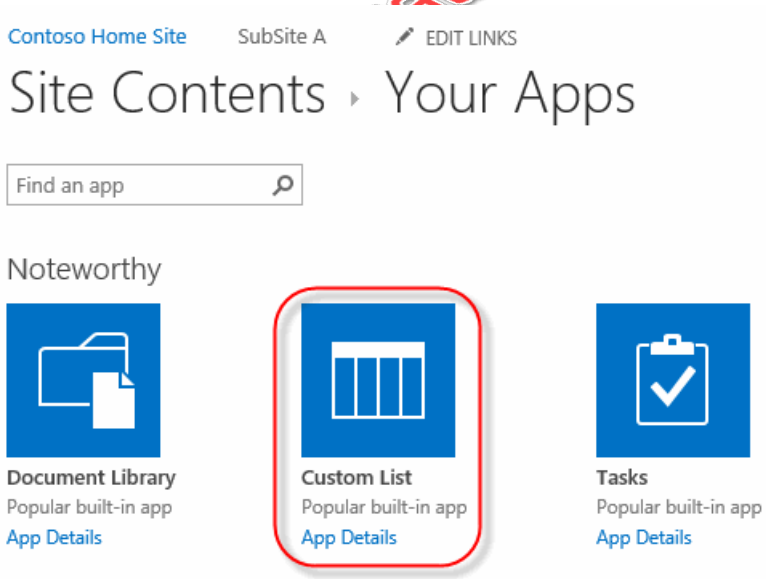
   D. Click the **OK** button to complete creating the new list column.

6. Create a new custom list and add it as a **Lookup** list column to **Demo List**.

   A. Click the **Settings** menu and then choose the **Add an app** menu item.



B. Select the **Custom List** template from the list of available templates.



C. Enter “States” in the **Name** field and then click the **Create** button.

D. Click the **States** link in the **Quick Launch** menu to navigate to the list.

E. Click the **Create Column** button link in the **List** tab toolbar.

F. Enter “Abbreviation” in the **Column name** field and set the **Maximum number of characters** text box under **Additional Column Settings** to “2”.

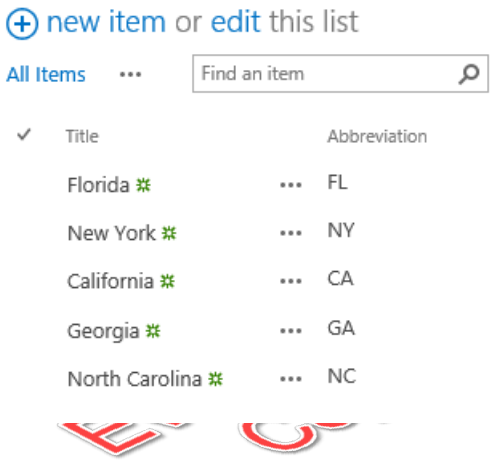
G. Click the **OK** button to complete creating the column.

H. Click the **new item** link in the **States** list.

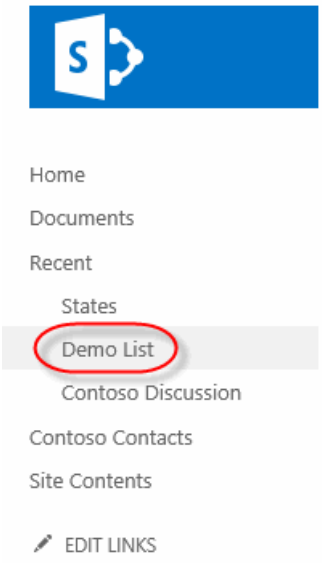
I. Enter “Florida” in the **Title** field text box and “FL” in the **Abbreviation** text box.

J. Click the **Save** button to save the new **States** item.

K. Repeat the previous steps to create the following **States** items:



L. Click the **Demo List** link in the **Quick Launch** menu to navigate to the list.

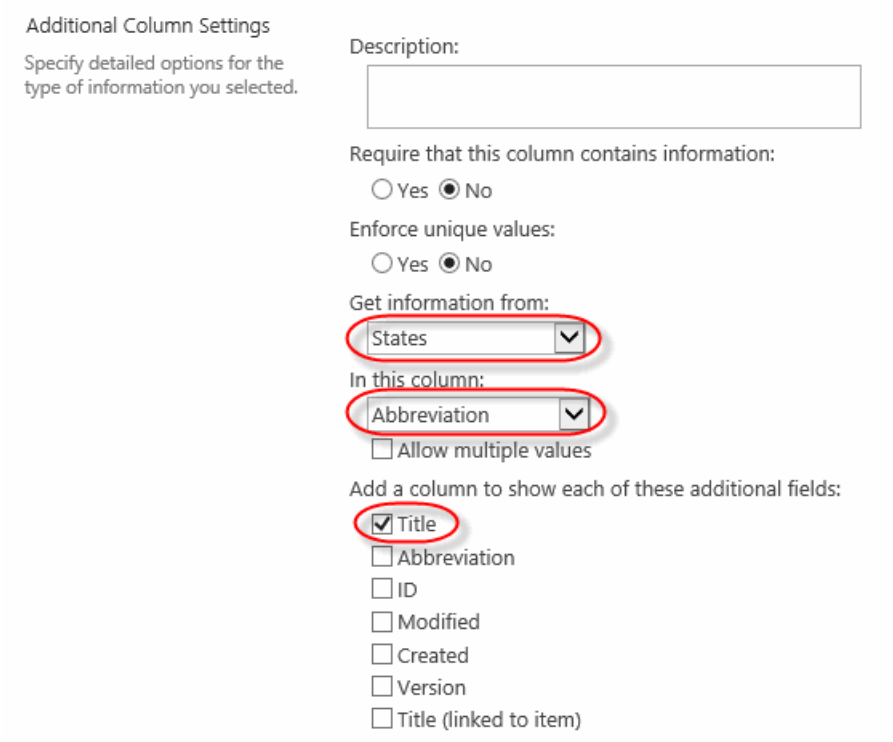


M. Click the **List** tab at the top of the list's page to open the **List** toolbar.

N. Click the **Create Column** button link in the **List** tab toolbar.

O. Enter "Home State" in the **Column name** text box field and change **The type of information in this column is** option field to **Lookup (information already on this site)**.

P. In the **Additional Column Settings** region change the **In this column** drop-down box to **Abbreviation** and select the **Title** check box under the **Add a column to show each of these additional fields** field.



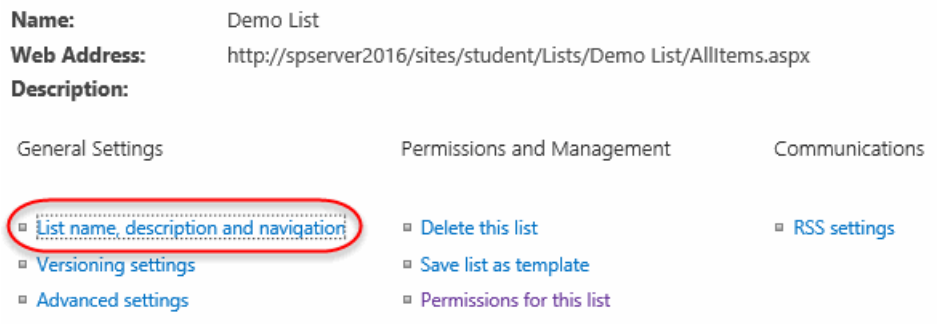
Q. Click the **OK** button to complete creating the new list column.

7. Set **Demo List** to permanently display in the **Quick Launch** menu.

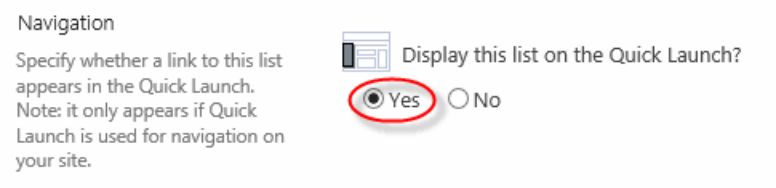
A. Click the **LIST** tab to open the toolbar.

B. Click the **List Settings** button on the **LIST** toolbar.

C. Click the **List name, description and navigation** link on the **Settings** page.



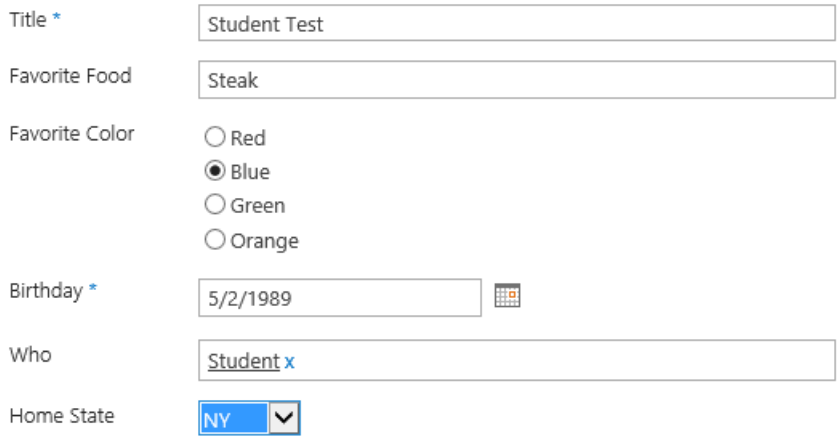
D. Click the **Display this list on the Quick Launch** option to **Yes** and click the **Save** button.



8. Create a sample item in the new **Demo List** to test the results of the custom columns.

   A. Click the **new item** link within the **Demo List** to create a new item.

   B. Use the data in the following image as sample data for the new **Demo List** item, change the **Who** field data to an account name that exists in your SharePoint installation.



Note

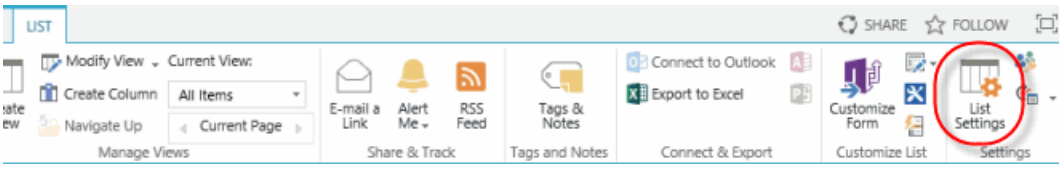
For the **Who** field, you can optionally click a name from the drop-down list that SharePoint provides.

2.4. Column Validation

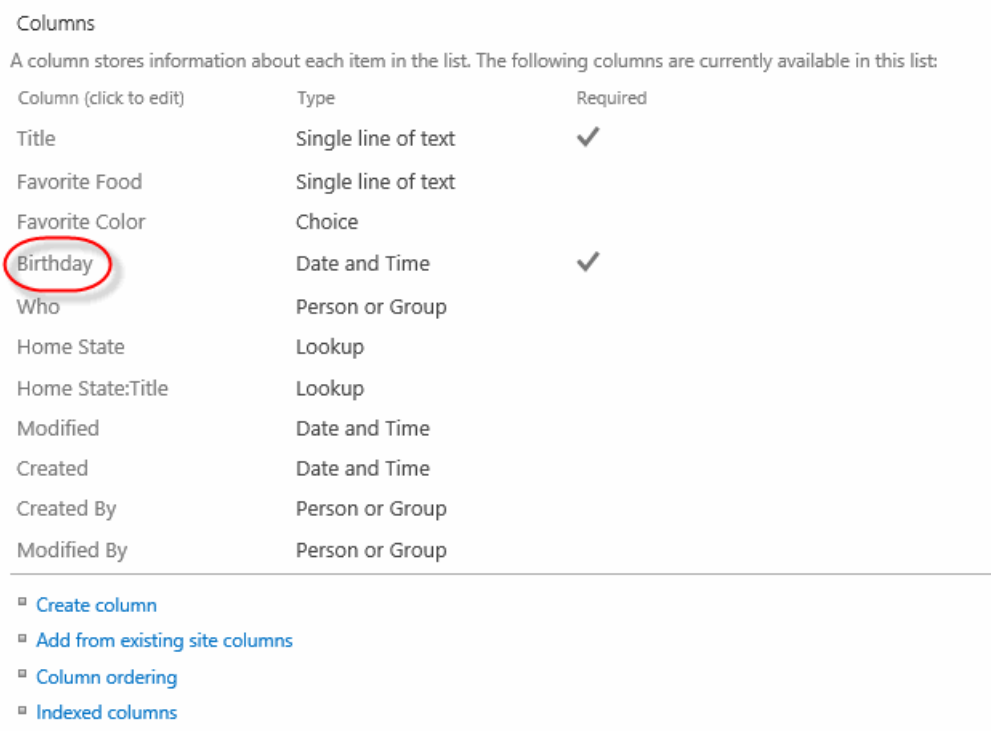
❖ 2.4.1. Validating a List Column

In this walk-through, you will learn how to enable validation on a custom list column. This walk-through will add validation to the **Birthday** list column added in the previous walk-through.

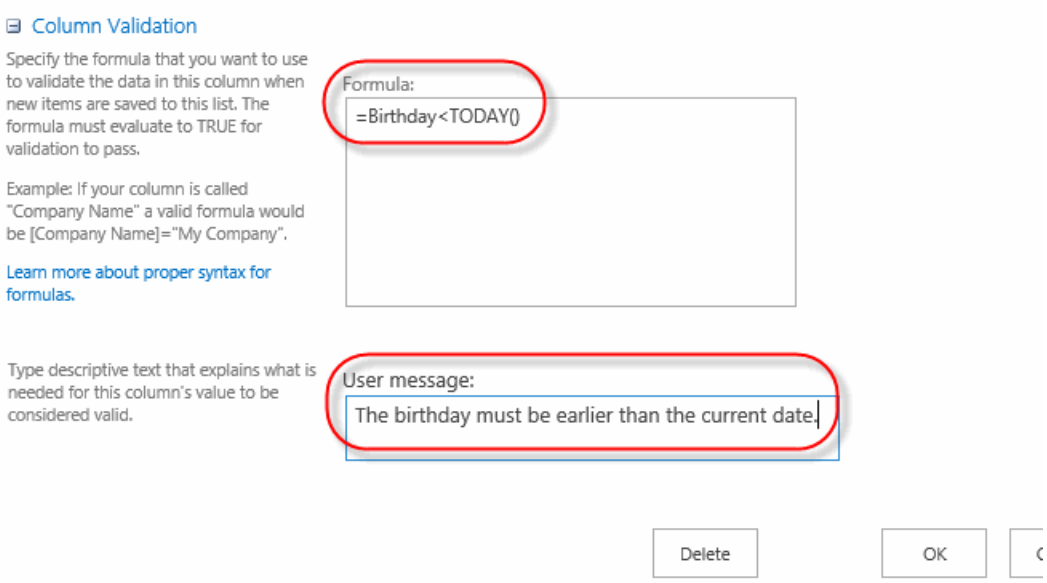
1. Configure validation on the **Birthday** column within the **Demo List**.
   A. Select the **Demo List** from the **Quick Launch** menu if you are not already on the list.
   B. Click the **List** tab at the top of the list's page to open the **List** toolbar.
   C. Click the **List Settings** button on the **List** tab toolbar to navigate to the list settings page.



   D. Click the **Birthday** link within the **Columns** region to navigate to the column settings page.



E. Expand the **Column Validation** region within the column settings page and enter `=[Birthday]<Today()` in the **Formula** field and `The birthday must be earlier than the current date.` in the **User message** field.



Note

The formula in this example will ensure that the user cannot enter a date that is the same as or after the current date.

F. Click the **OK** button to save the changes.

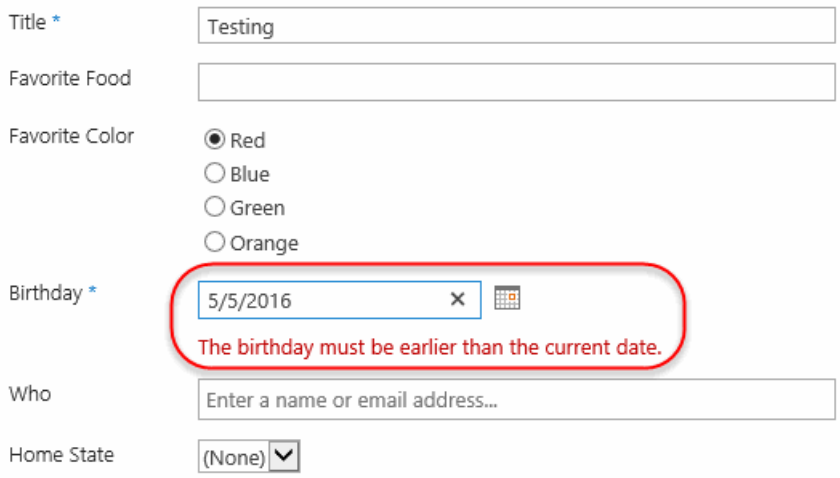
2. Test the new column for validation.

   A. Select the **Demo List** from the **Quick Launch** to navigate back to the main **browse** view of the list.

   B. Click the **new item** link within the **Demo List** to create a new item.

   C. In the required **Title** field, enter “Testing” and select a future date in the **Birthday** field.

   D. Click the **Save** button. You should get a validation error message similar to the following image:



Note

If you did not get an error message, go back and check our column settings validation formula and make sure it was typed in correctly.

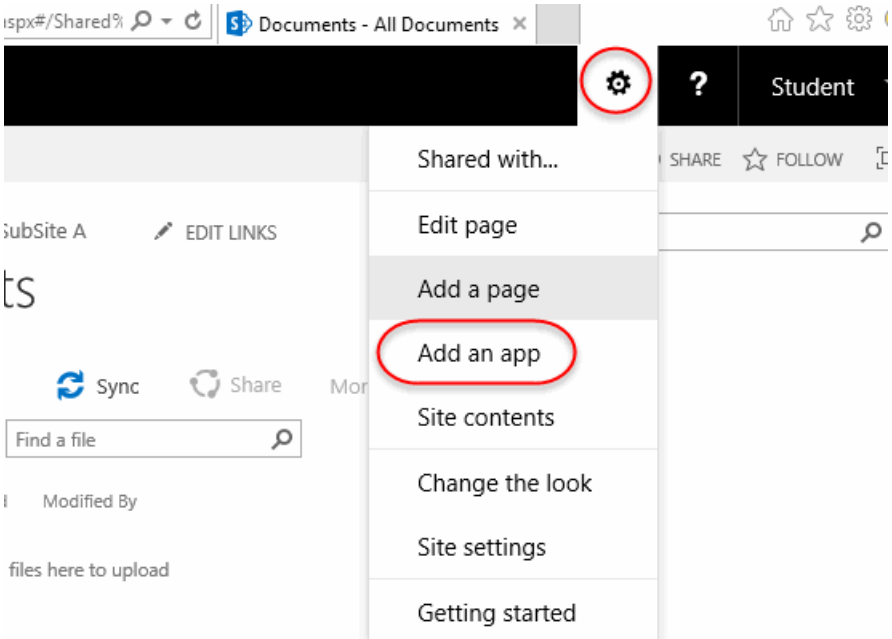
   E. Change the **Birthday** date field to a date earlier than the current date and click the **Save** button. The new item should be saved and displayed in the list.

Exercise 2: Working with Team Site Lists

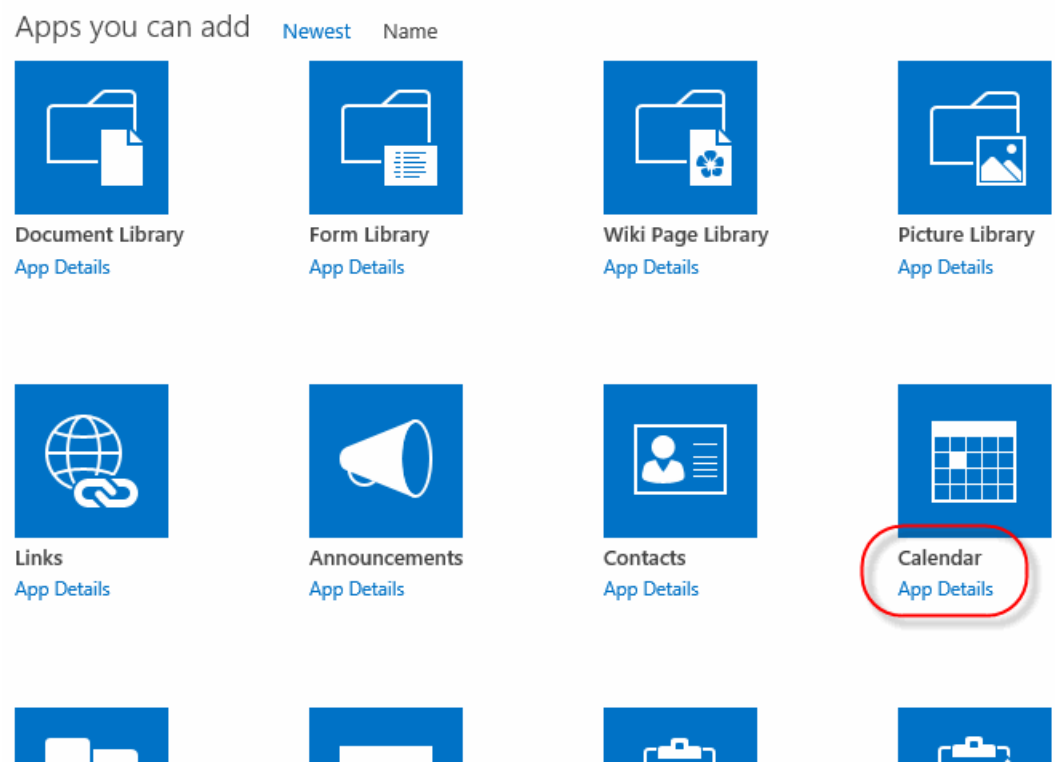
10 to 15 minutes

In this exercise, you will work with some of the default list templates in SharePoint 2013.

1. Create a new Calendar list.
   A. Click the **Settings** menu and then choose the **Add an app** menu item.



   B. Scroll down the list of templates to locate and select the **Calendar** template from the list of available templates.

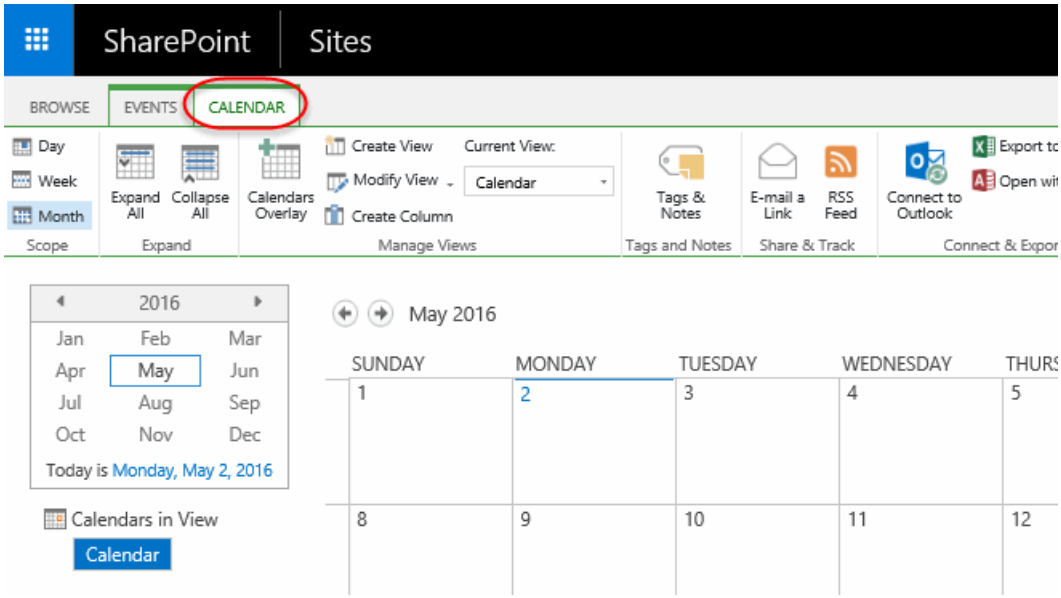


C. Enter “Calendar” in the **Name** field and then click the **Create** button.

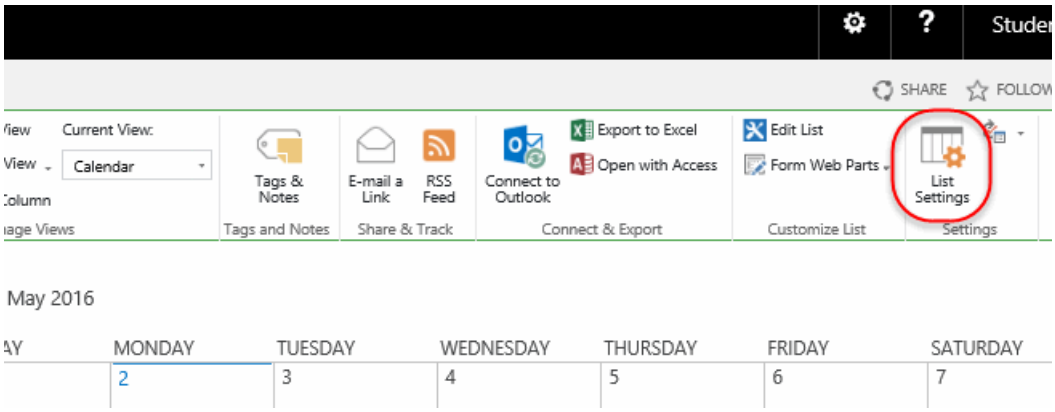
2. Add a permanent link to **Calendar** in the **Quick Launch** menu.

   A. Click the **Calendar** link under the **Recent** heading in the **Quick Launch** menu.

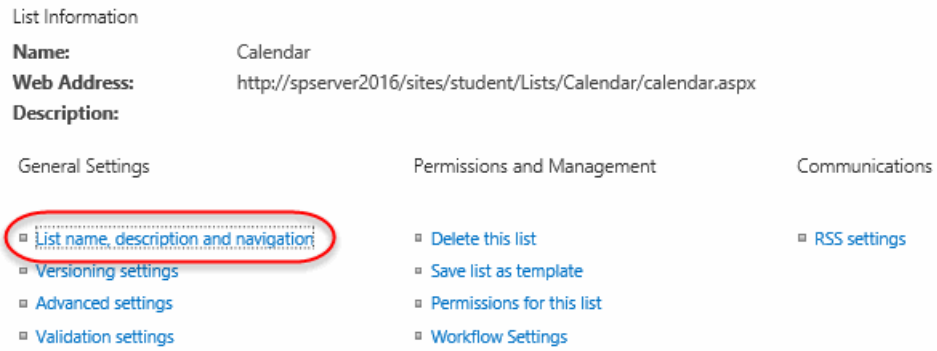
   B. Click the **Calendar** tab to open the toolbar.



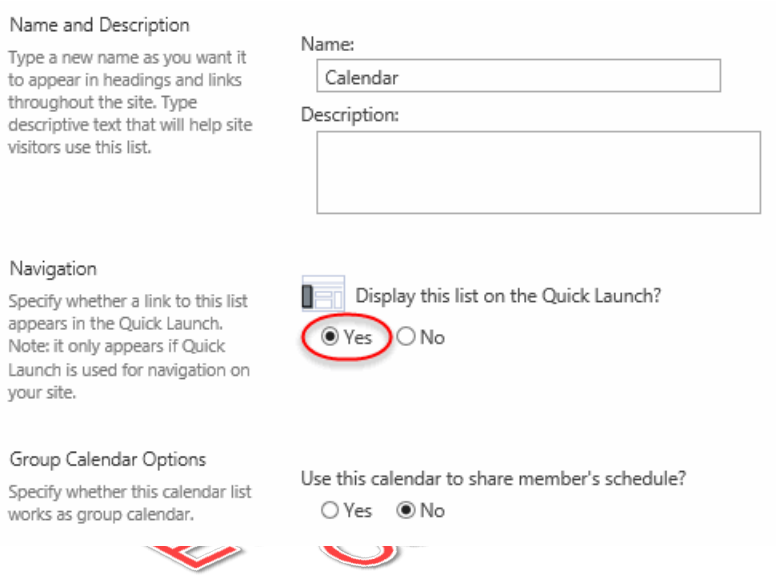
C. Click the **List Settings** link button on the **Calendar** tab toolbar.



D. Click the **List name, description and navigation** link on the list settings page.



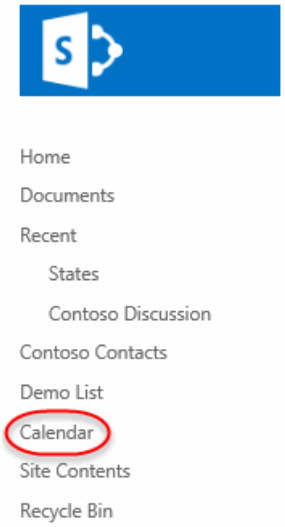
E. Click the **Yes** radio button to add **Contoso Contacts** to the site's **Quick Launch** menu and click the **Save** button.



Note

Note the option to **Use this calendar to share member's schedule**. The default is **No,** which makes the calendar events visible to everyone who has view permissions to the list. If you set the option to **Yes**, then events have an added option to invite attendees. Only attendees that have been invited by the person creating the event will see the event when they view the calendar.

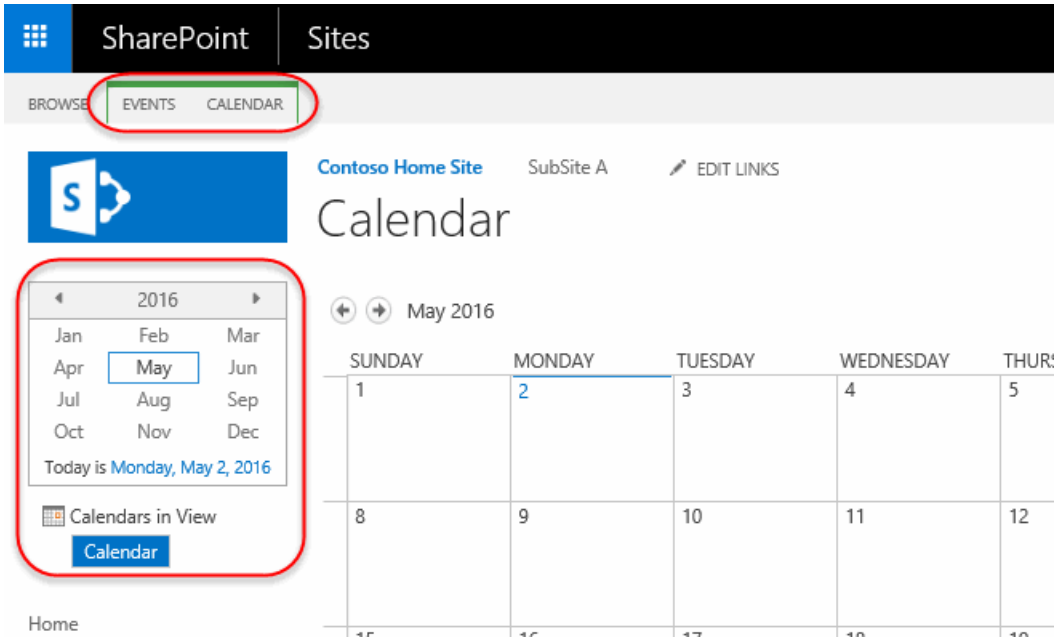
F. Note that **Calendar** now shows on the site's **Quick Launch** menu as a root-level item.



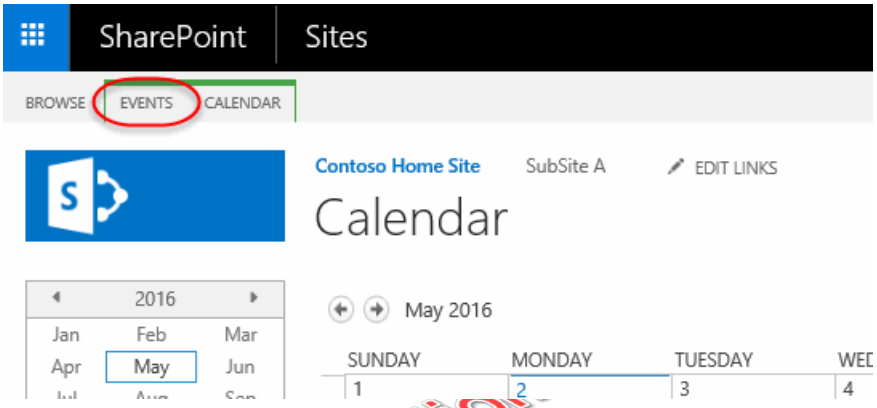
3. Create a Calendar entry.

   A. Click the **Calendar** link within the **Quick Launch** menu. This will take you to a special view of the calendar.

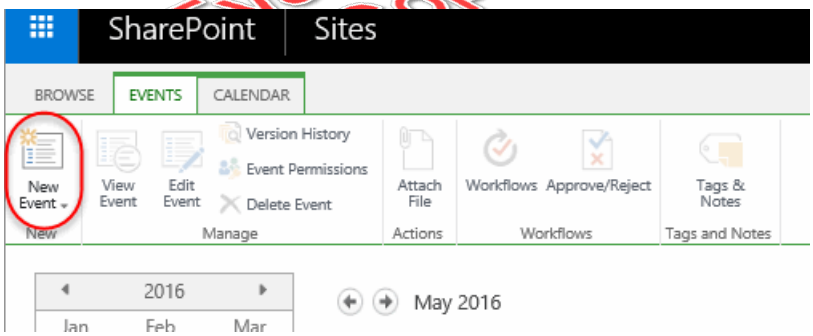
   B. Note how this calendar view has added a couple of new tabs to the top of the page next to the **Browse** tab. In addition, the **Quick Launch** has been modified with a tool that allows you to change the year and month being viewed.



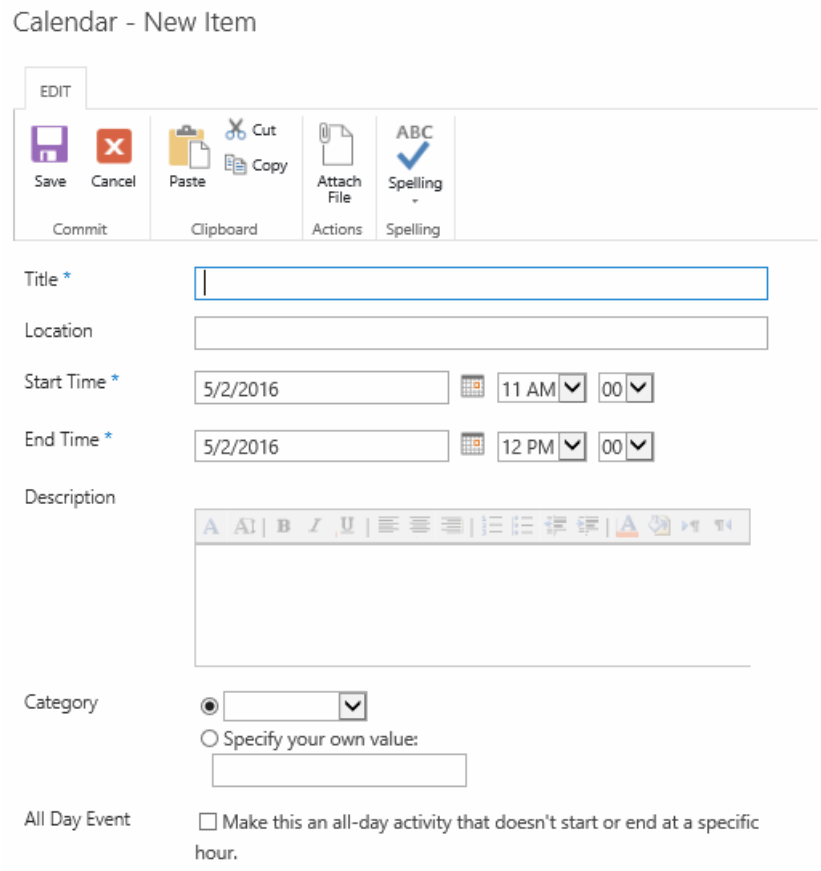
C. Click the **Events** tab to get the calendar's toolbar to display.



D. Click the **New Event** link button in the **Events** toolbar.



E. Fill in the form with whatever values you like. You must enter values for the **Title, Start Time**, and **End Time** fields, These are required fields as indicated by the blue asterisks next to their labels.



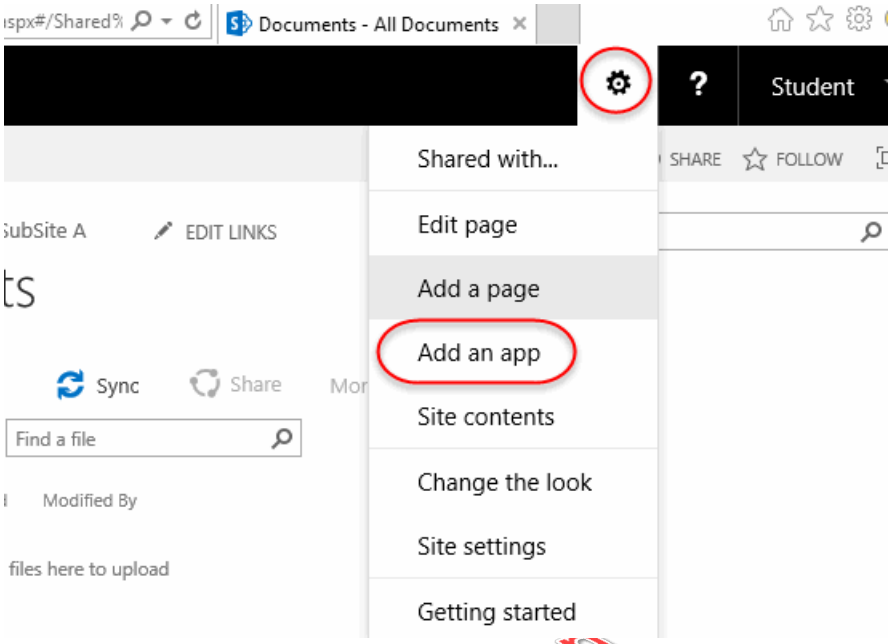
F. Click the **Save** button once you have finished filling out the form.

G. Verify that the calendar displays with a shaded bar and event title across the days the new event is scheduled.

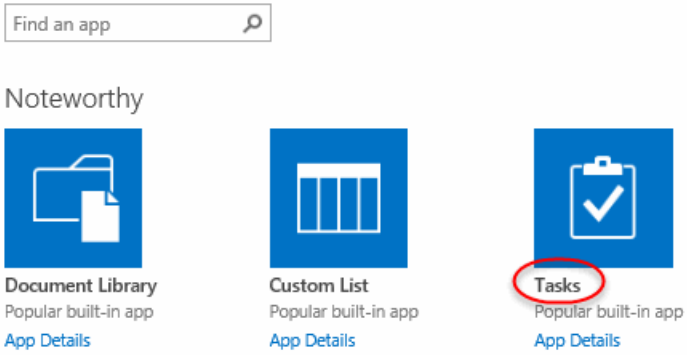
H. Feel free to experiment by creating additional events in the calendar.

4. Create a new Tasks list.

   A. Click the **Settings** menu and then choose the **Add an app** menu item.



B. Scroll down the list of templates to locate and select the **Tasks** template from the list of available templates.

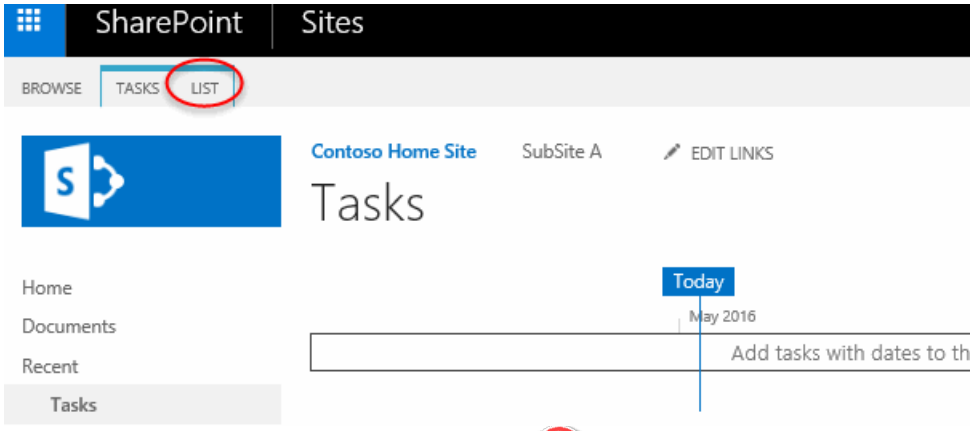


C. Enter “Tasks” in the **Name** field and then click the **Create** button.

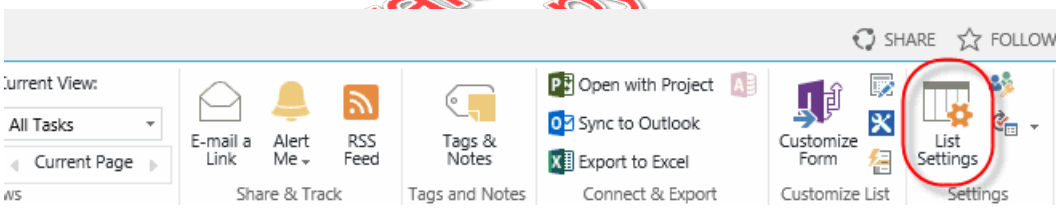
5. Add a permanent link to **Tasks** in the **Quick Launch** menu.

   A. Click the **Tasks** link under the **Recent** heading in the **Quick Launch** menu.

   B. Click the **List** tab to open the toolbar.



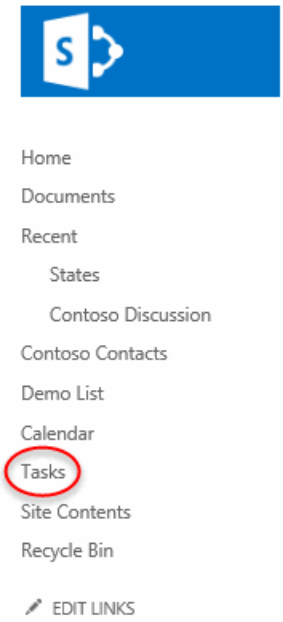
C. Click the **List Settings** link button on the **List** tab toolbar.



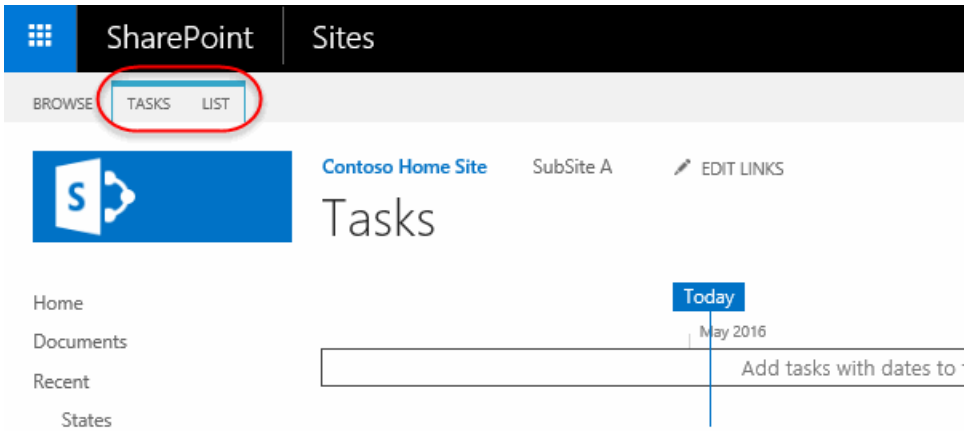
D. Click the **List name, description and navigation** link on the list settings page.

E. Click the **Yes** radio button to add **Tasks** to the site's **Quick Launch** menu and click the **Save** button.

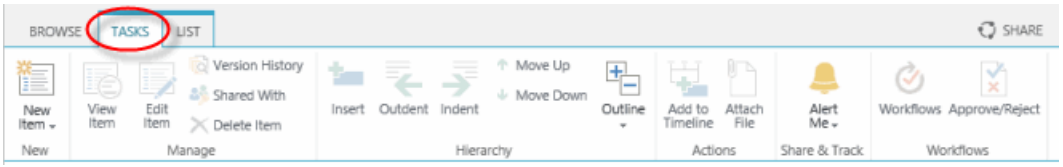
F. Note that **Tasks** now shows on the site's **Quick Launch** menu as a root-level item.



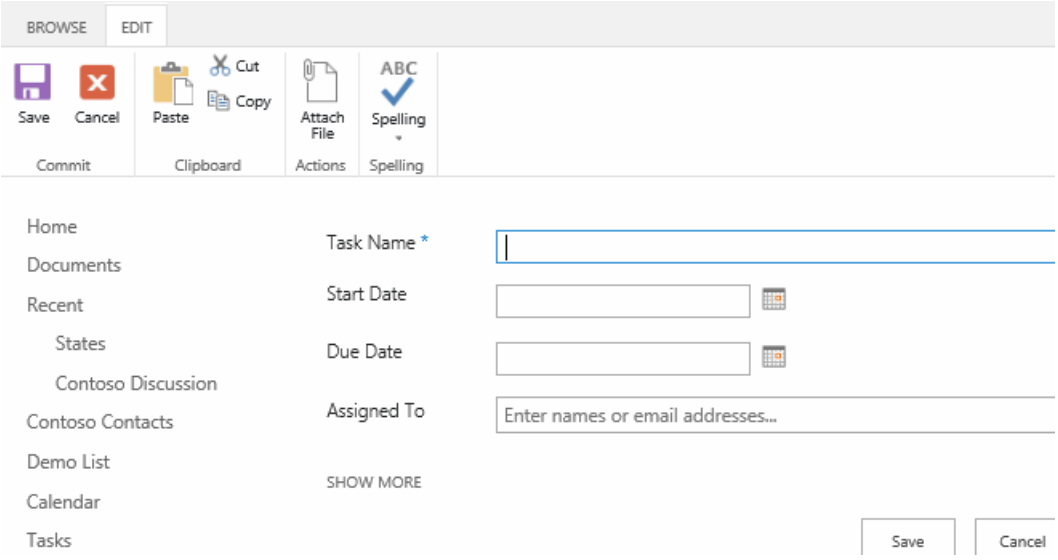
6. Create a new Task.
   A. Click the **Tasks** link within the **Quick Launch** menu. This should take you to a view of the tasks list.
   B. Note how this tasks list view has added a couple of new tabs to the top of the page next to the **Browse** tab.



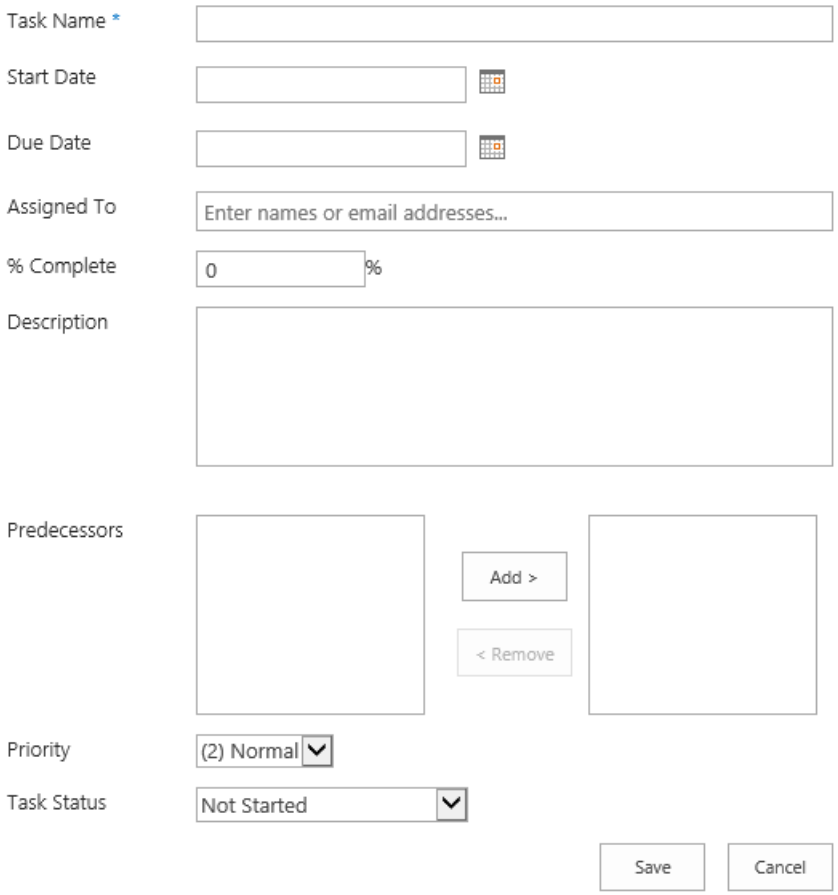
   C. Click the **Tasks** tab to get the task list's toolbar to display.



D. Click the **New Item** link in the Task list's toolbar to open the new task form.



E. Click the **SHOW MORE** link in the form to open the view the additional task fields.



F. Use the following table for information to fill in the new task form:

Field	Data
Title:	Type “Complete lesson on creating SharePoint lists”
Priority:	Select **(2) Normal**
Status:	Select **In Progress**
% Complete	Type “50”
Assigned To:	Enter your account name here.
Description:	Type “Creating and working with SharePoint lists.”
Start Date:	Select (Date course started)
Due Date:	Select (Date course ends)

G. Click the **Save** button once you have finished filling out the form.

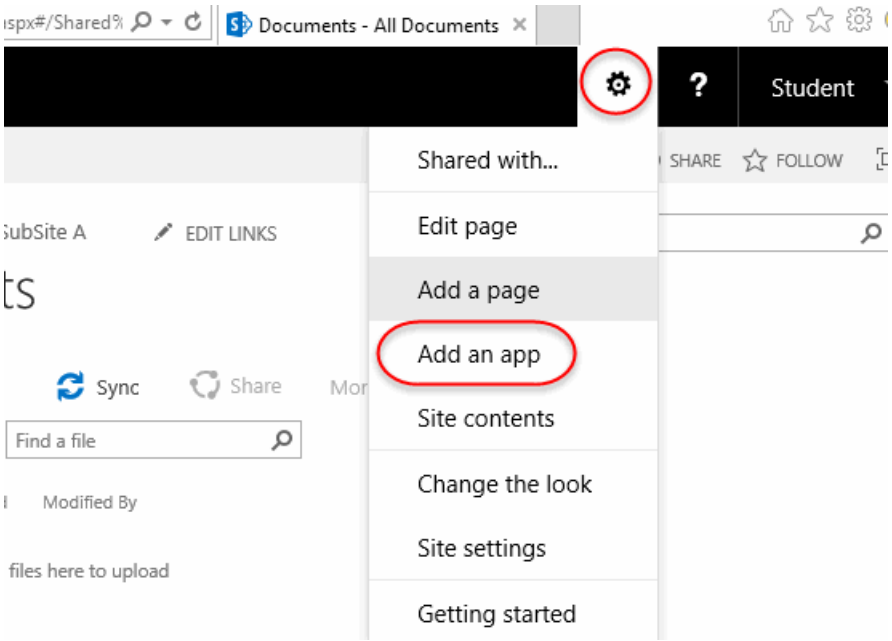
H. Verify that the Task list displays with the new task you created. Feel free to experiment by creating additional tasks in the Tasks list.

Exercise 3: Create Custom Lists and Columns

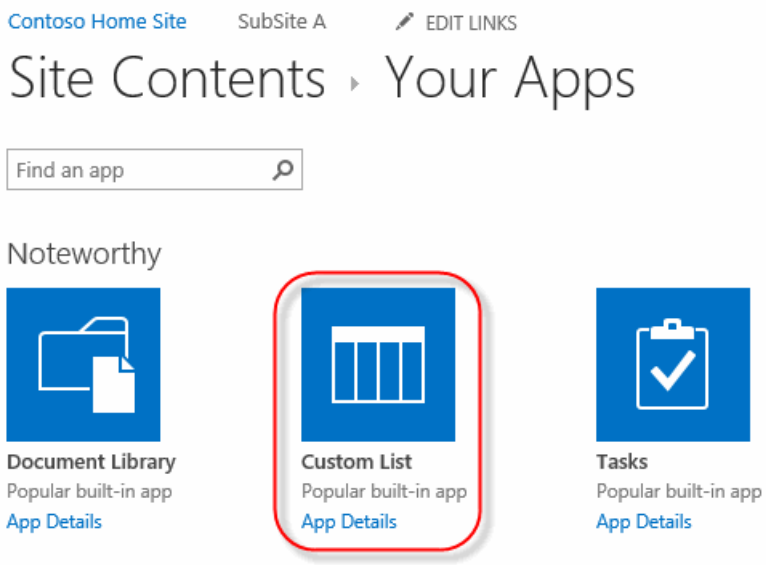
15 to 25 minutes

In this exercise, you will learn to create a new list from the Custom List template. In addition, you will learn to modify column properties as well as add new custom columns.

1. Create a new list in your Team Site using the **Custom List** template.
   A. Click the **Settings** menu and then choose the **Add an app** menu item.



   B. Select the **Custom List** template from the list of available templates.

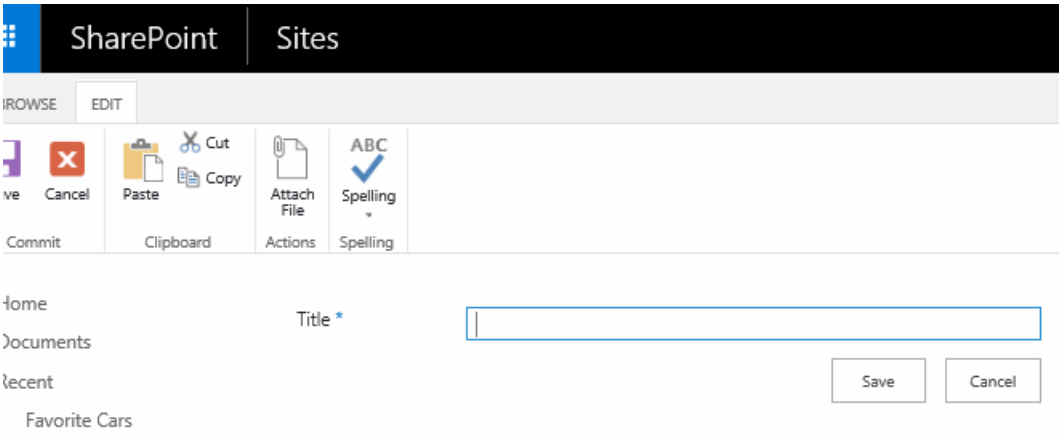


C. Enter “Favorite Cars” in the **Name** field and then click the **Create** button.

2. Add custom columns to the new **Favorite Cars** list.

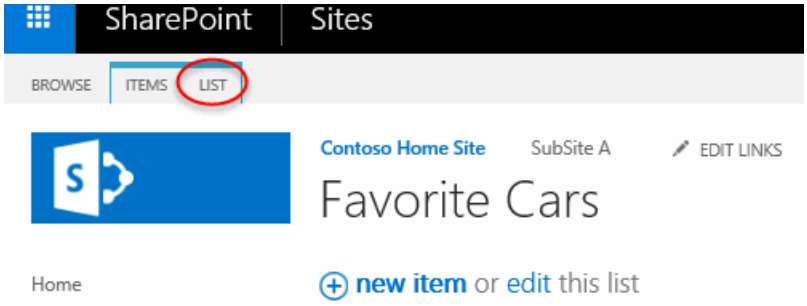
A. Click the **Favorite Cars** list from the **Quick Launch** menu if it is not already selected.

B. Click the **new Item** in the middle of the empty list main page. This will open a new list item.

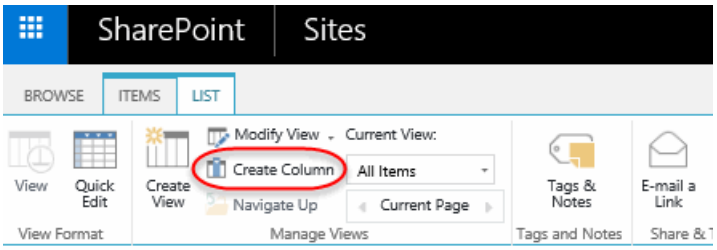


C. Do **not** enter anything at this time; just verify that the only field is the required **Title** field. Click the **Cancel** button to close the dialog form without creating a new list item.

D. Click the **List** tab to open the lists toolbar.



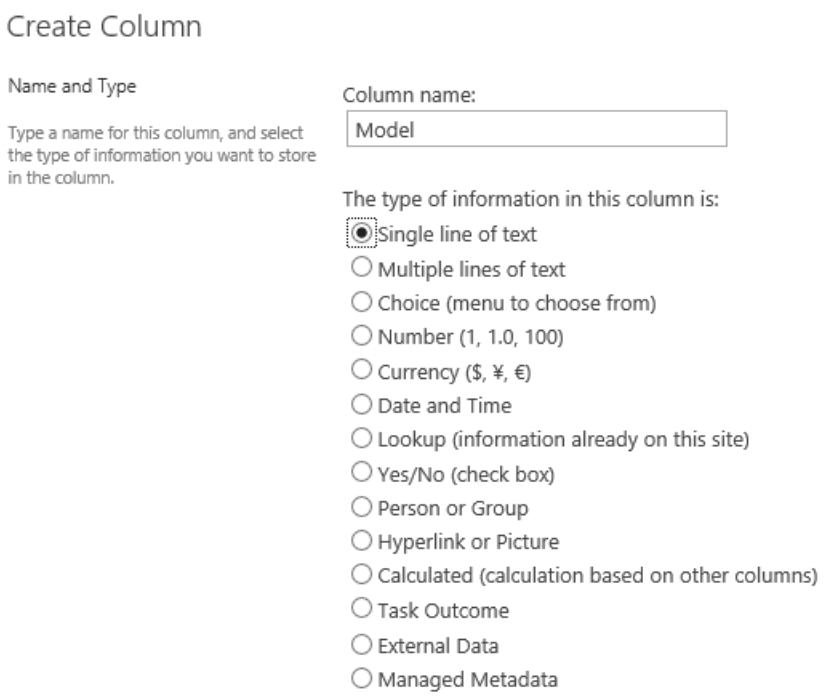
E. Click the **Create Column** button in the **Manage Views** section of the toolbar.



Note

Note that the image is only showing a portion of the list's toolbar due to space constraints. In addition, your web browser window's width will affect the buttons displayed on the toolbar.

F. Enter "Model" for the **Column name** field and leave the default **Single line of text** as the data type for the column.



Take a few moments to read through the additional column settings, but the default values are fine for this exercise.

G. Click the **OK** button to create and save the changes to the new list column.

H. Repeat the steps above to create two additional columns and use the following table for information about the new columns:

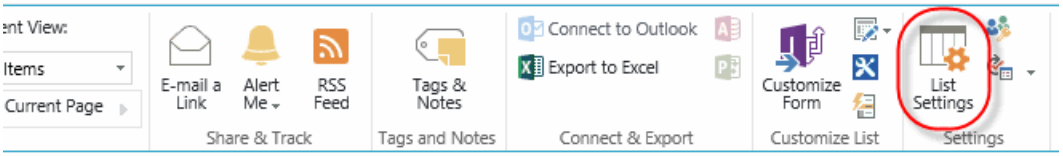
Column name	Data type
Top Speed	Number
Price	Currency

I. Keep the default column settings for the new **Top Speed** and **Price** columns based on their data types. Take a moment to note that the different data types have different additional settings. For example, the **Currency** data type has a currency format selection.

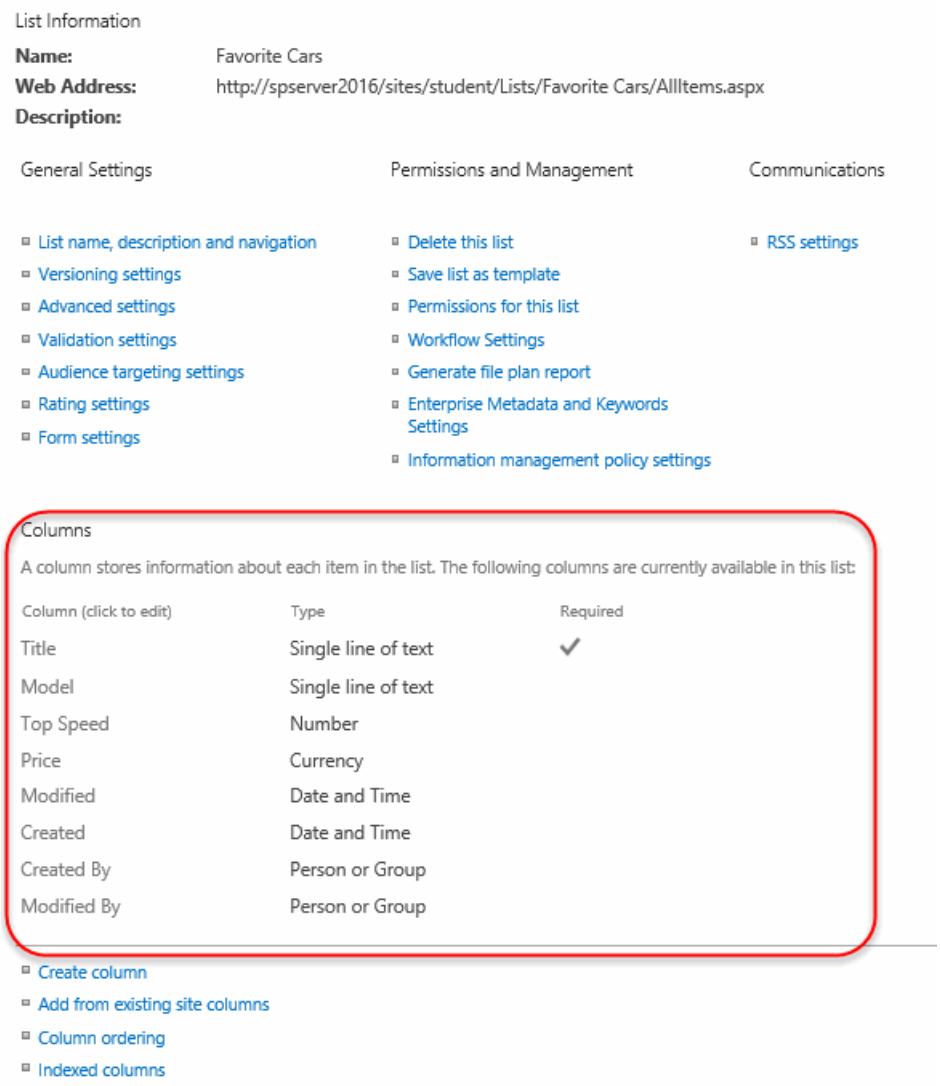
3. Rename the existing **Title** column in the **Favorite Cars** list to **Make**.

A. Verify that the newly created **Favorite Cars** list is selected in your site's **Quick Launch** menu. Select it if it is not.

B. Click the **List Settings** button on the **List** tab within the **Settings** group in the toolbar.



C. Take a moment to read through the list settings page. This page offers links to various list administration task links grouped by category. The group we are going to be working with is the **Columns**.

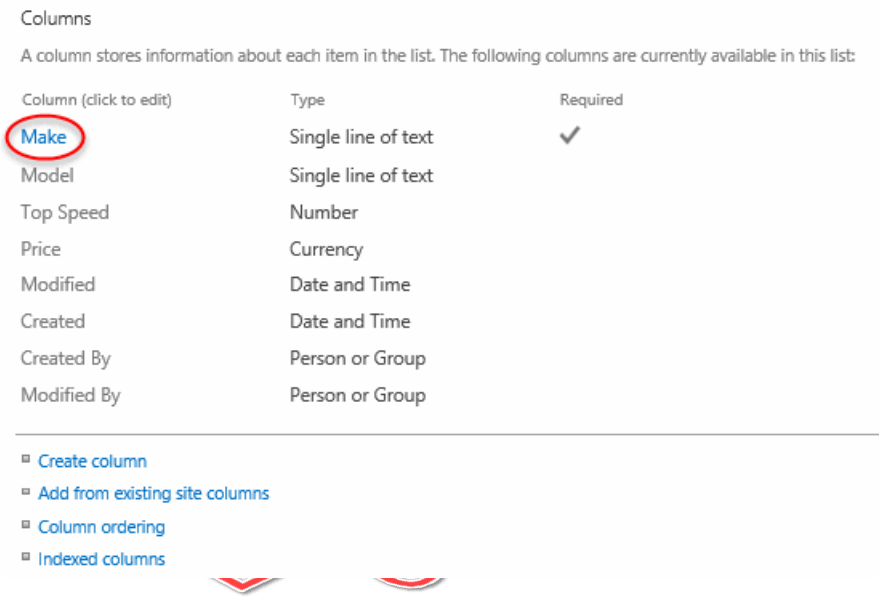


D. Click the **Title** column link to bring up the column settings page. Note how using this page you can change various settings of the column based on the data type of the column.

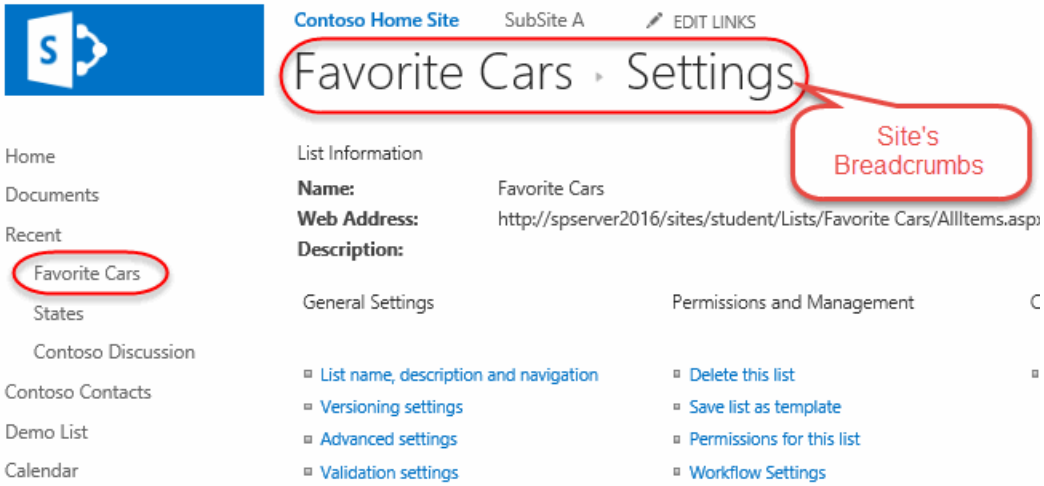
E. To rename this column, type over the text in the **Column name** field with the text “Make”.

F. Click the **OK** button to save your changes and return to the list settings page.

G. Verify that the old column **Title** has been renamed to **Make** in the column group.

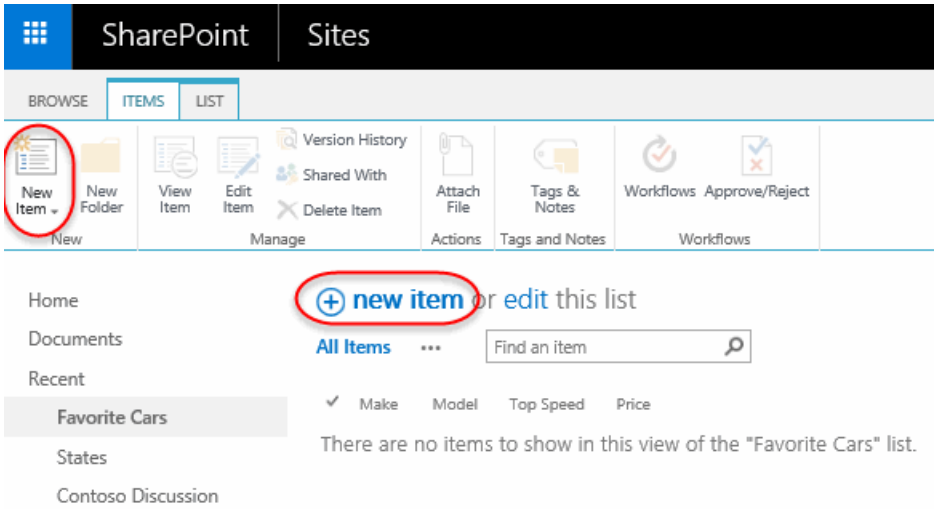


H. Click the **Favorite Cars** link in either the **Quick Launch** or the Site’s Breadcrumbs to navigate back to the browse view of the **Favorite Cars** list.

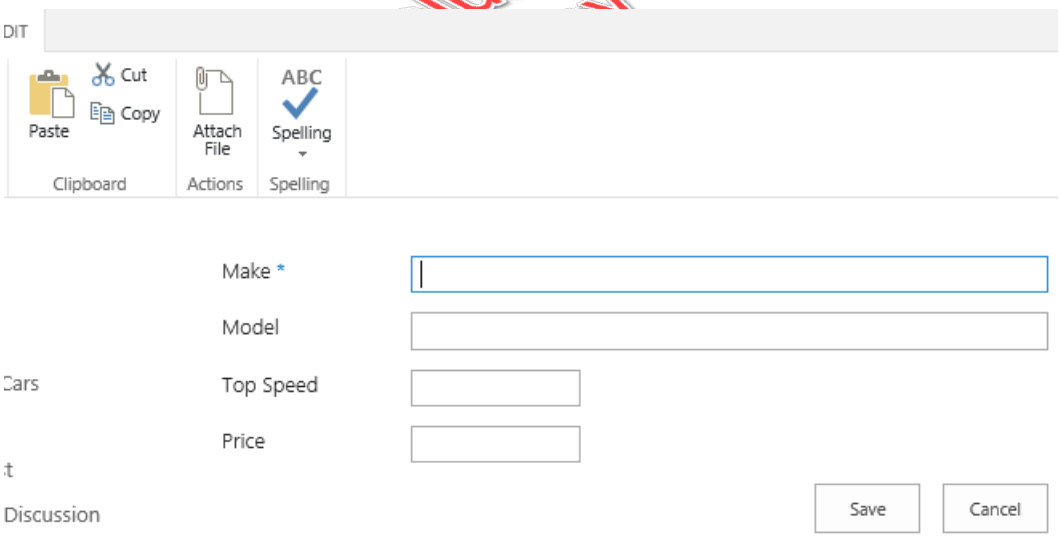


4. Add some new **Favorite Cars** to the custom list.

   A. Click either the **new item** link within the list or the **New Item** button on the **Items** tab toolbar of the **Favorite Cars** list.



   B. The **Favorite Cars** new item dialog form will open with fields for the custom columns you added earlier.

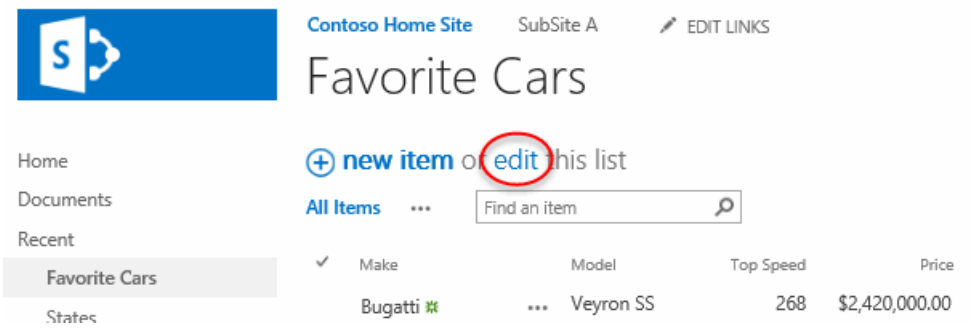


   C. Enter the following values for new Favorite Car item and click the **Save** button to save the data back to the list.

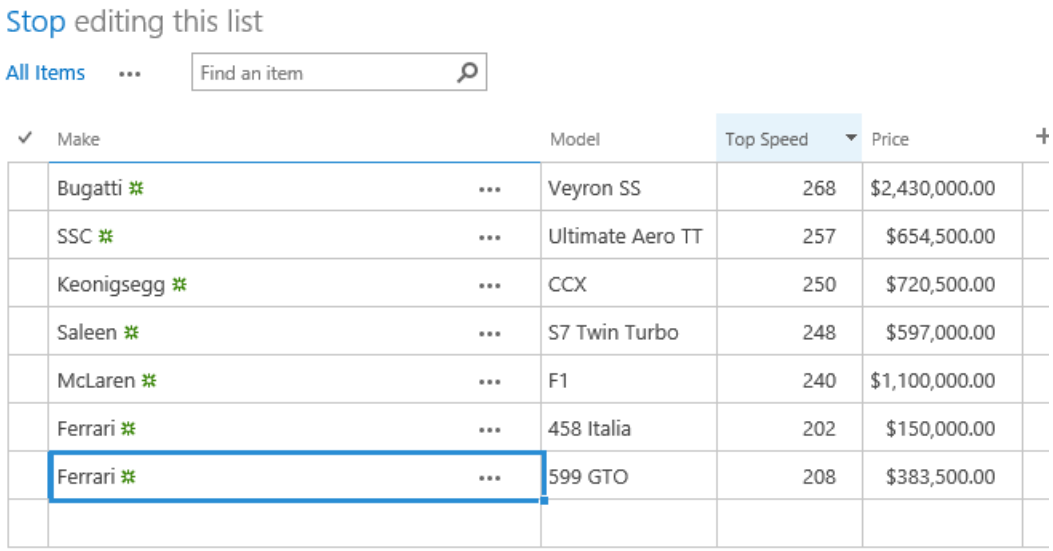
Make	Model	Top Speed	Price
Bugatti	Veyron SS	268	2,420,000.00

D. To add multiple cars to the new **Favorite Cars** list, you can use the **edit** link to enter items in a spreadsheet type of view. You can use the following table for data to input but feel free to use your own "favorite cars" as well.

Make	Model	Top Speed	Price
SSC	Ultimate Aero TT	257	654,500.00
Koenigsegg	CCX	250	720,500.00
Saleen	S7 Twin Turbo	248	597,000.00
McLaren	F1	240	1,100,000.00
Ferrari	458 Italia	202	150,000.00
Ferrari	599 GTO	208	383,500.00



E. Compare your list to the following image:



It should look the same or similar depending on whether you used your own “favorite cars” or not. Note the **Price** column is formatted as currency for you based on the data type you chose for that column.

F. Click the **Stop** link to exit the editing view.

Conclusion

In this lesson, you have learned:

- How to work with various List Templates.
- How to work with default lists in a Team Site and add data to them.
- How to create a custom list.
- How to add columns to a list.
- How to control and validate input into list fields.
- How to link data from separate lists.

LESSON 3
Library Basics

Topics Covered

☑ Creating new libraries using library templates.

☑ Working with the different libraries in a default Team Site.

☑ Adding columns to a library.

☑ Checking out documents for editing.

☑ Deleting and restoring documents from document libraries.

☑ Enabling versioning on a library.

☑ Reverting a library document to a an earlier version.

Introduction

SharePoint Libraries share the same characteristics as SharePoint lists such as columns, views, and validation to name a few. What distinguishes SharePoint libraries is that each item in a library has a underlying document. So in addition to the data stored in library columns, the document stores its own data based on the type of document. Because of the extra data that can be stored in columns that can be used to filter and search by and features such as versioning, libraries are considered a great replacement for the more traditional file server system. Libraries are, like lists, a fundamental building block in a SharePoint site.

3.1. Library Templates

Library templates define the characteristics of a library when used to create a new library. The characteristics defined by a library templates include the column types, views, and forms for editing and viewing library item data. Library templates also store a document template for creating new documents in the library.

There are many factors that define the library templates available to a site such as the version of SharePoint and the features that have been enabled in the farm, site, and site collection. New library templates can be easily added to a site so the library template choices can vary between different SharePoint installations and even sites within a single installation.

The following is a list of some of the out-of-the-box library templates that come with a SharePoint 2016 Team Site.

- Document Library
- Form Library
- Wiki Page Library
- Picture Library
- Data Connection Library
- Report Library
- Asset Library

All SharePoint libraries have a **New** and an **Upload** link listed at the top of the library for adding new content.

If your SharePoint installation is integrated with Office Online Server (separate product from SharePoint), than the **New** link will prompt you for what type of Office document you want to create. Once a choice is made the document will be opened in a browser window ready to be edited. If you do not have Office Online Server than the **New** link will behave exactly the same as the **Upload** link by opening a file browser window allowing you to select files you wish to upload to the library.

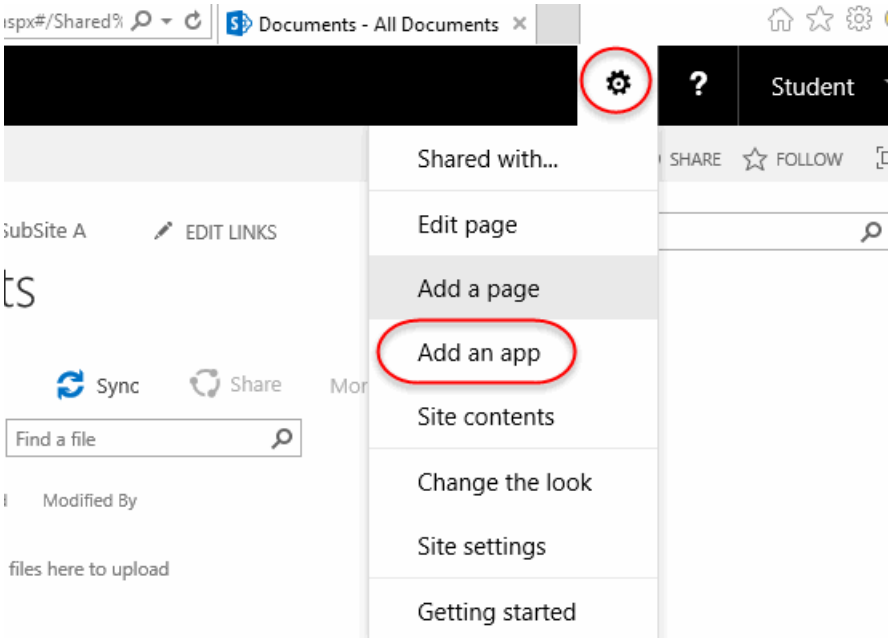
3.2. Creating Libraries

❖ 3.2.1. Creating a Document Library and Adding Columns

The following walk-through will show you how to create a new **Document Library** for Microsoft Word documents. Additionally, the walk-through will show you how to customize the library by adding columns.

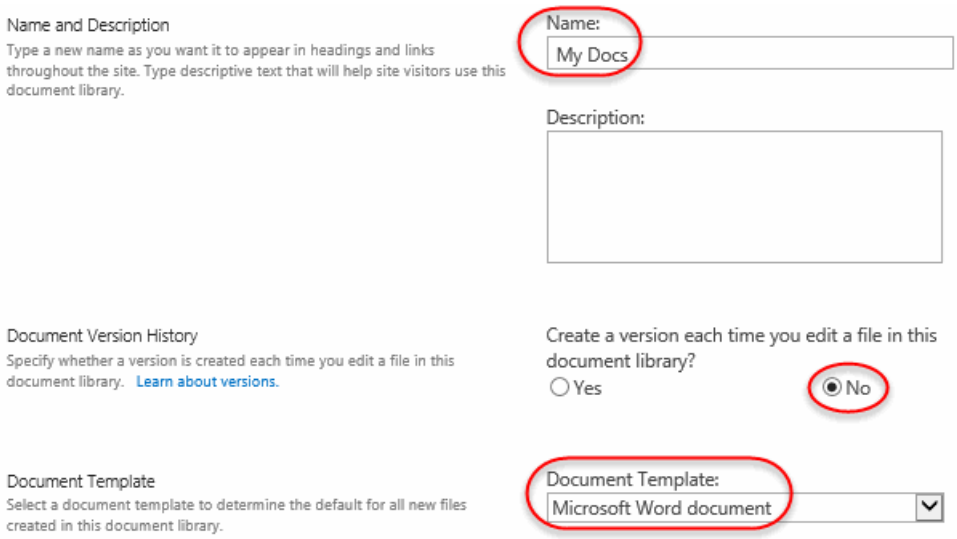
1. Create a new Document Library.

   A. Click the **Settings** menu and then choose the **Add an app** menu item.



   B. Select the **Document Library** template and click the **Advanced Options** button to view the options.

   C. In the expanded options form type “My Docs” in the **Name:** field, click **No** for the **Document Version History** option (versioning will be explored in a later walk-through) and verify that **Microsoft Word document** is selected in the **Document Template** drop-down box. Click the **Create** button to complete the process.

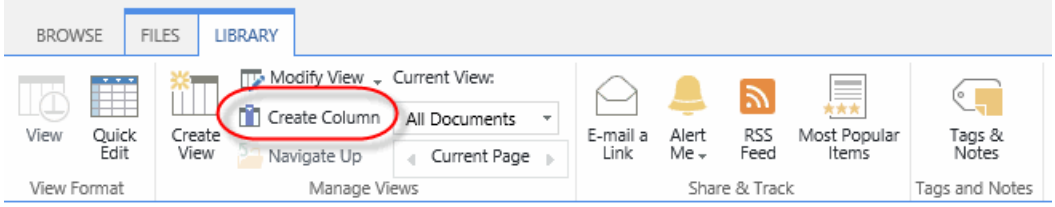


Naming Conventions

Many Website administrators feel strongly about not using spaces when naming a list, library or new site. The reason for this is that the spaces will be replaced with "%20" characters in the URL. This can make the URL difficult to read and links can become convoluted. The title of the list, library, or site can always be changed after they are created using the properties pages that will be covered in a later part of this course. This will change what is displayed but not affect the URL. For simplicity and readability the exercises and walk-throughs in this course often include the space in the name and accepts the fact that the URL will have the "%20" replacement characters.

2. Create a custom library column for the **My Docs** library. The process and column types are the same for libraries as they are for lists so to keep things simple this walk-through only creates a single column.

   A. Click the **Create Column** button in the **Library** tab toolbar.



Where's the Create Column button?

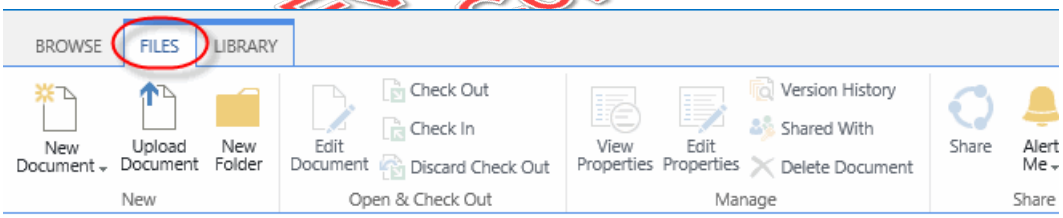
The **Create Column** button might not display the text next to the icon if your browser window is not wide enough.

B. Enter "Department" in the **Column name** field and leave the default for **The type of information in this column is** option field set to **Single line of text**.

C. Leave the rest of the column options at their default settings and click the **OK** button to complete creating the new library column.

3. Create a new document in the **My Docs** library.

A. Click the **Files** tab to open the toolbar.



B. Click the **New Document** button on the **Files** tab toolbar.

C. If you get the **Open Document** dialog window, click the **OK** button to open it.

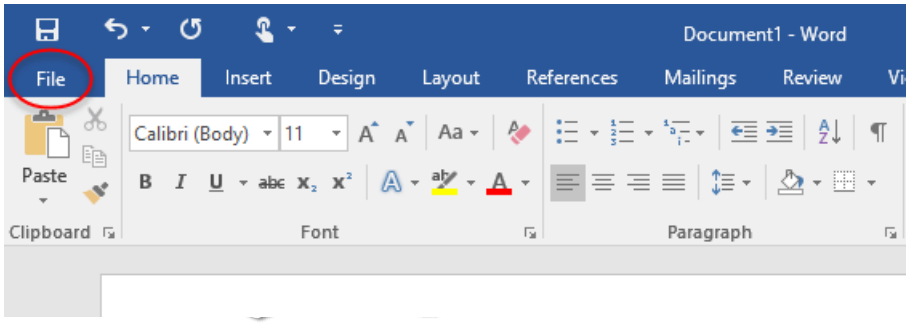
Why does the dialog window appear?

This dialog window appears because the **New Document** button links to a template file stored as part of the **Shared Documents** library. The default template is just a blank Word document but that is what causes Word to load and present you with a blank page. In a later part of this course, you will learn to create custom templates and associate them with libraries.

D. Type the following text in the new blank Microsoft Word document: “This document is for a demonstration on SharePoint document libraries.”

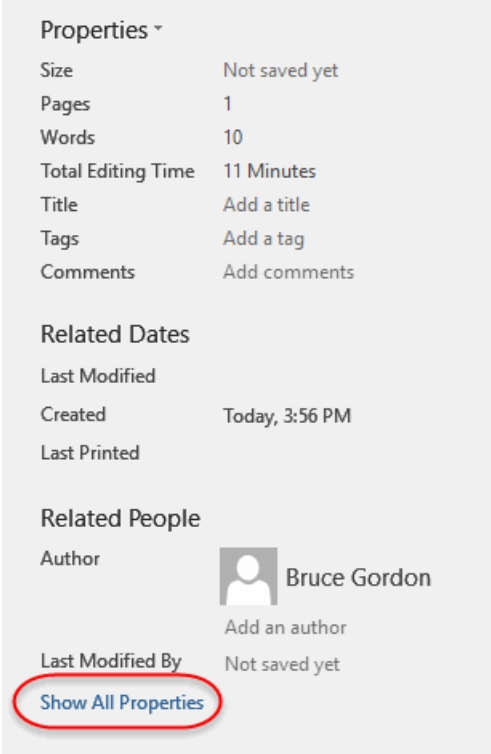
4. Set the SharePoint column field values from within the Word application.

A. Click the **File** tab in the Microsoft Word toolbar.

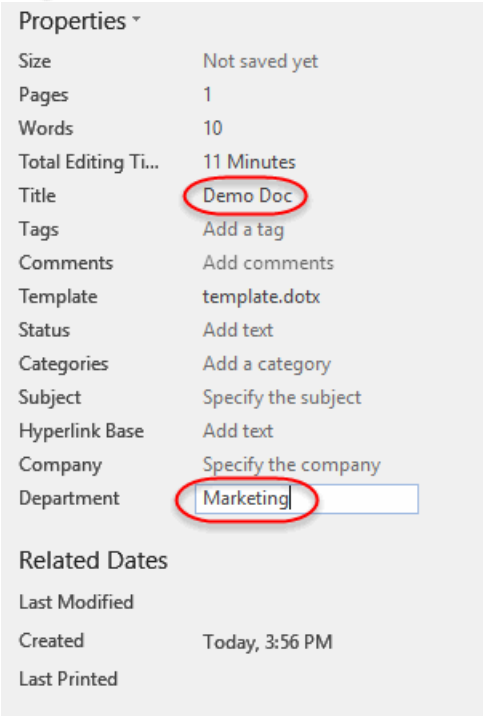


Document Information Panel Discontinued
Microsoft removed the Document Information Panel from the 2016 version of Office. In prior versions you could edit the SharePoint column field values from a panel at the top of the document.

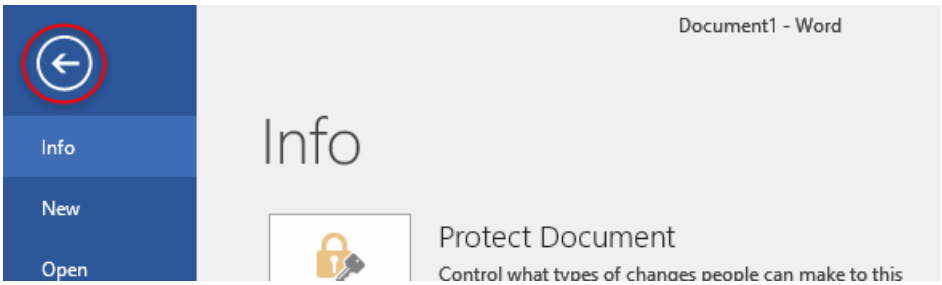
B. Click the **Show All Properties** link on the **Info** page of the Word document.



C. Type “Demo doc” in the **Title** field text box and “Marketing” in the **Department** field text box.



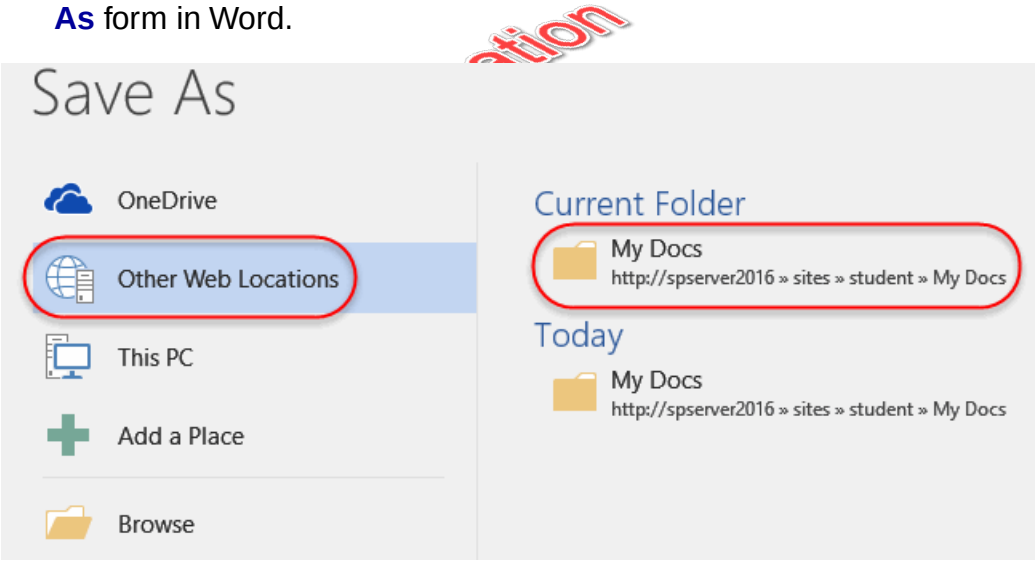
D. Click the **back** arrow on the **Info** page to navigate back to the main view of the document.



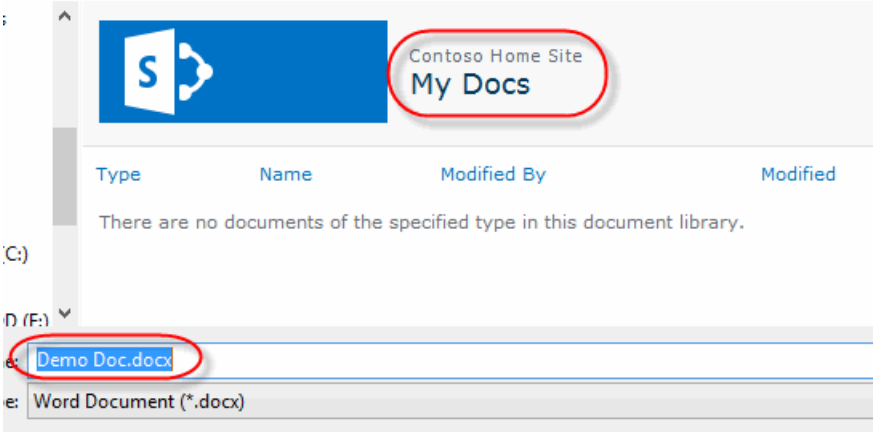
5. Save the document back to the SharePoint library.

A. Click the **Save** icon at the top of Word's toolbar to save our new document.

B. Click the **Other Web Locations** and then click **My Docs** link on the **Save As** form in Word.



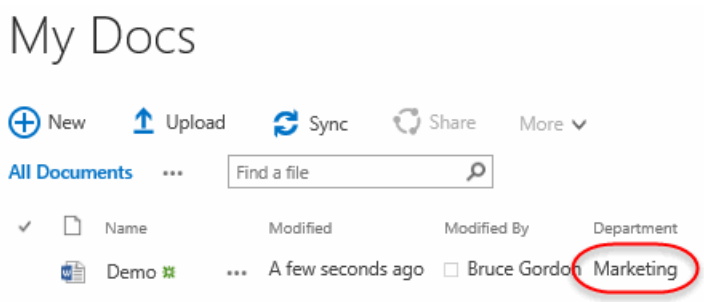
C. Enter "Demo Doc" for the **File Name** field in the **Save As** dialog window. Note how the file is being saved directly to the **My Docs** document library in the **Contoso Home Site**. Click the **Save** button to complete the save process.



D. Close Microsoft Word.

E. Click the **My Docs** link in the **Quick Launch** to refresh the view of the library and you should see your new document listed.

F. Note the **Department** column in the **My Docs** library with the "Marketing" meta data term stored with the **Demo Doc** document item.



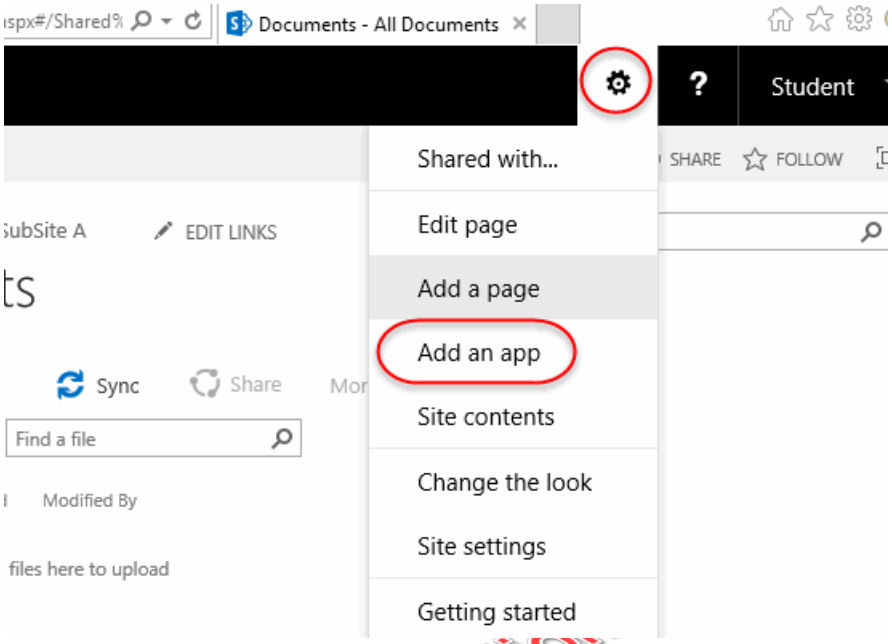
Meta Data
The ability to store meta data information with documents is one of the reasons that SharePoint is considered superior to storing files in a more traditional file server/shared folder system.

❖ 3.2.2. Creating an Asset Library

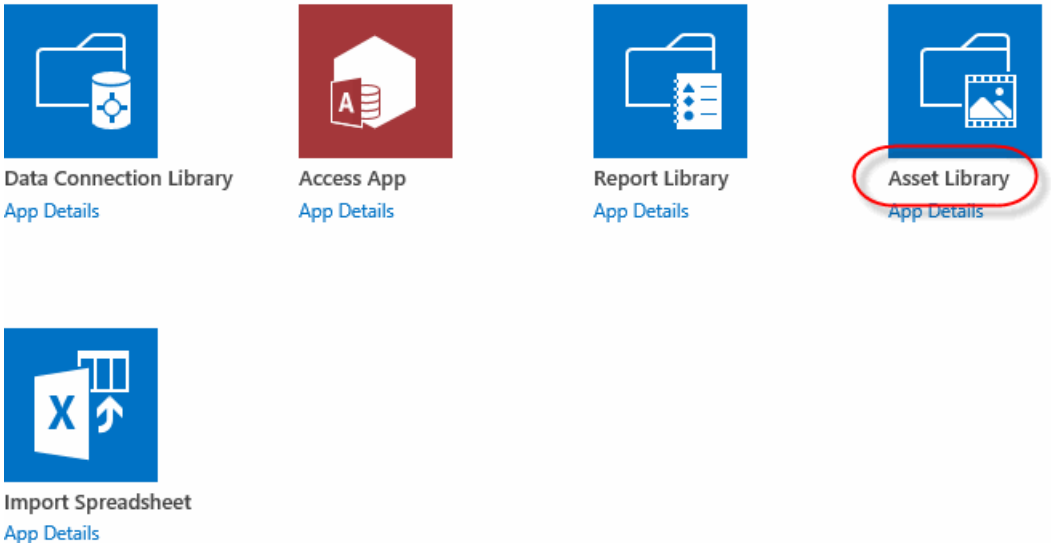
The following walk-through will show you how to create a new library using the **Asset Library** template.

1. Create a new **Asset Library**.

   A. Click the **Settings** menu and then choose the **Add an app** menu item.

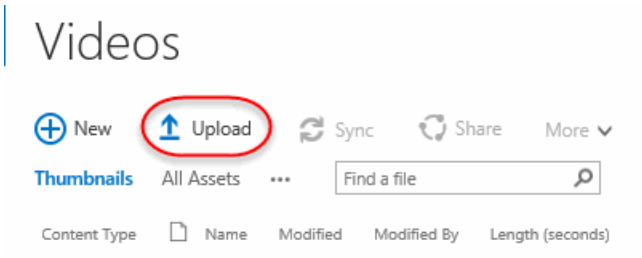


   B. Locate the **Asset Library** template in the list of template. You may have to go to the next page of templates to find it or you can use the search box.

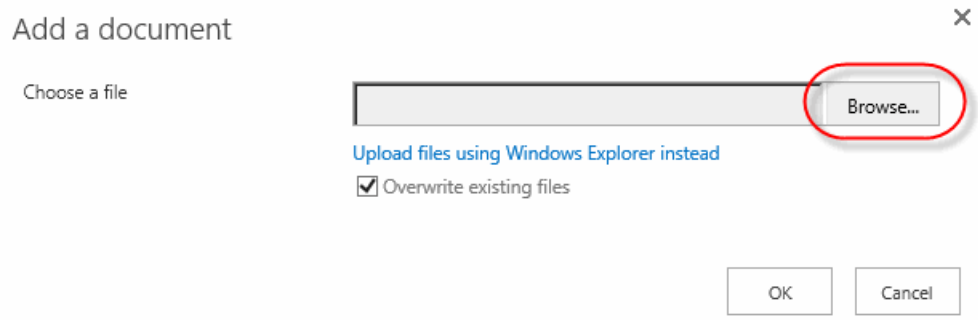


   C. Select the **Asset Library** template and type "Videos" in the **Name** text box and click the **Create** button to complete the process.

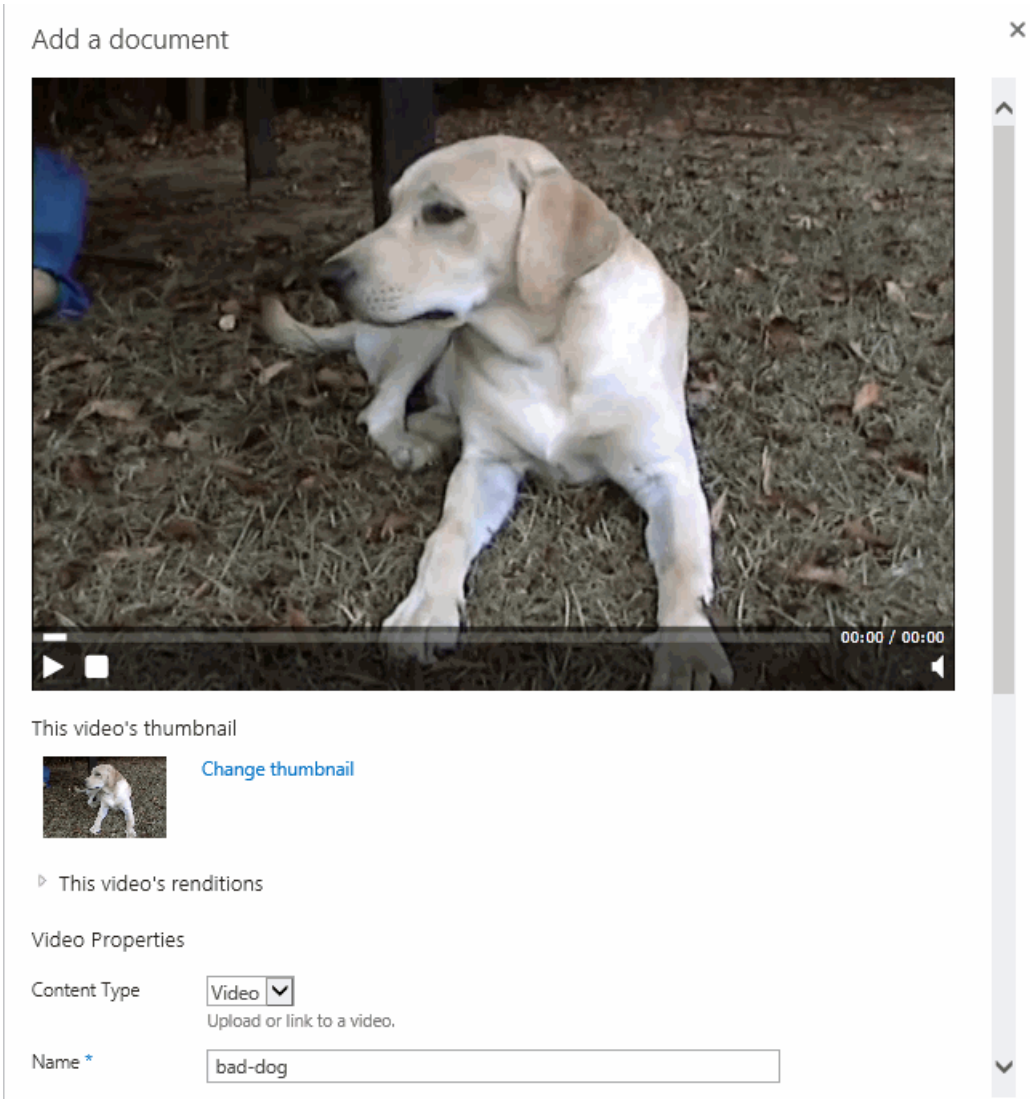
2. Add video files to the new **Videos** asset library.
   A. Navigate to the **Videos** library by clinking the link in the **Quick Launch**.
   B. Click the **Upload** link in the **Videos** library.



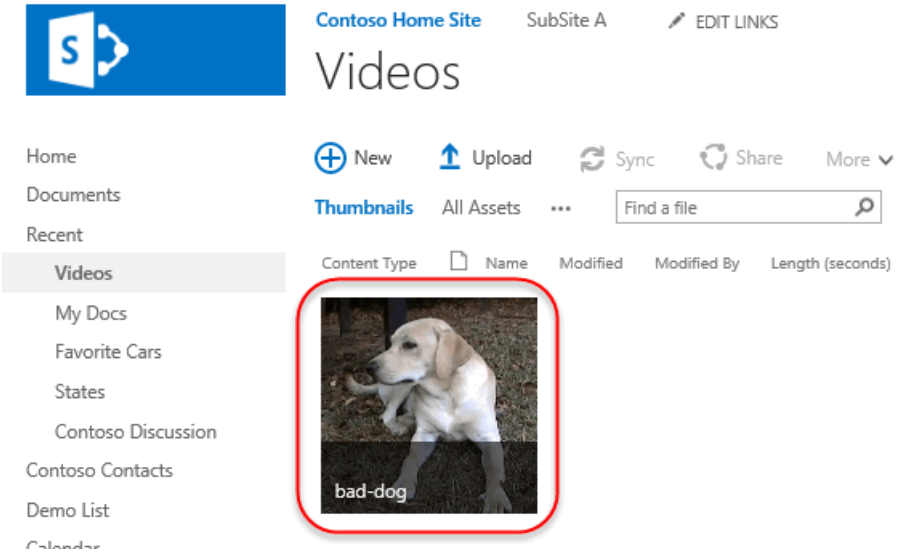
   C. Click the **Browse…** link in the **Add a document** dialog form.



   D. In the **Open** dialog window navigate to the folder you copied the course class files into. Click to select the file named `bad-dog.wmv`. Click the **Open** button to complete the selection.
   E. Click the **OK** button to start the upload.
   F. Note the options on the dialog window that opens. The options allow you to change the name and set a thumbnail among other settings. Leave everything at their defaults and click the **Save** button.



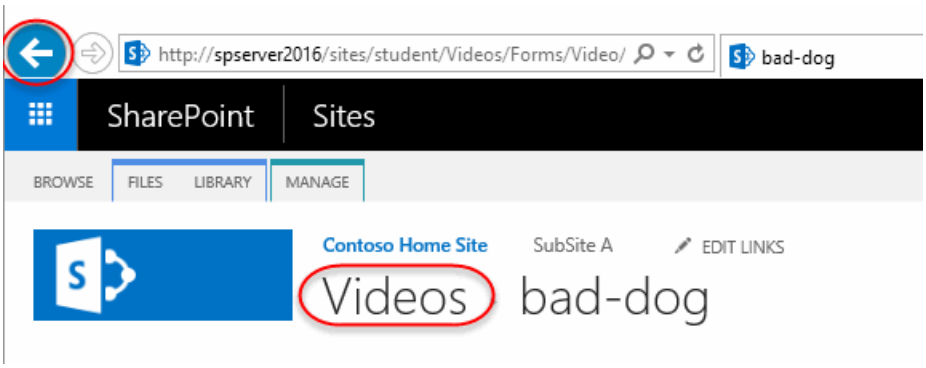
3. Play a video in the **Videos** asset library inside the library page.
   A. Click the **bad-dog** video icon within the **Videos** asset library.



B. The video should start playing inside a Silverlight plug-in control.

Silverlight Plug-in
The video will only play from inside the library if the Silverlight plug-in is installed.

C. When you are done viewing the video, use the browsers back button or the site's breadcrumbs to navigate back to the **Videos** library.

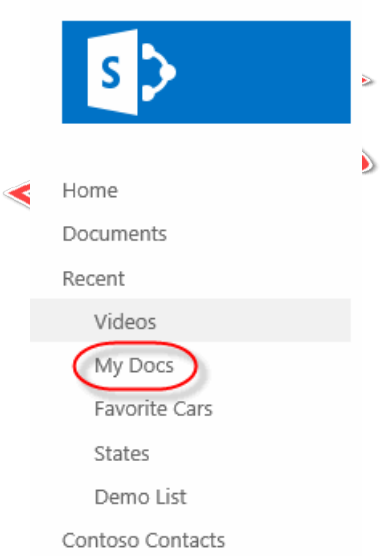


3.3. Managing Documents and Versioning

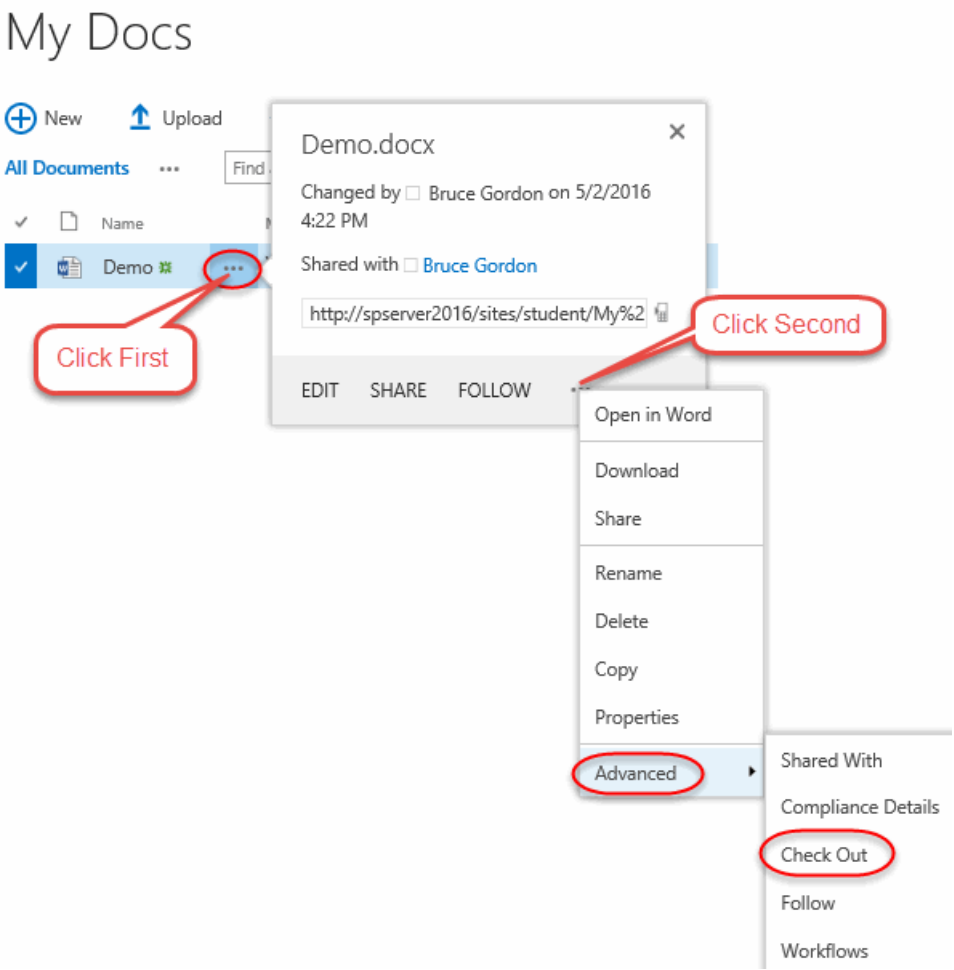
❖ 3.3.1. Checking Out Documents

The following walk-through will show you how to use the **Check Out** feature to lock a document so that you can edit it safely without anyone else being able to modify the document while you have it checked out.

1. **Check Out** a document from the **My Docs** library.
   A. Click the **My Docs** link in the **Contoso Home Site** **Quick Launch** menu.



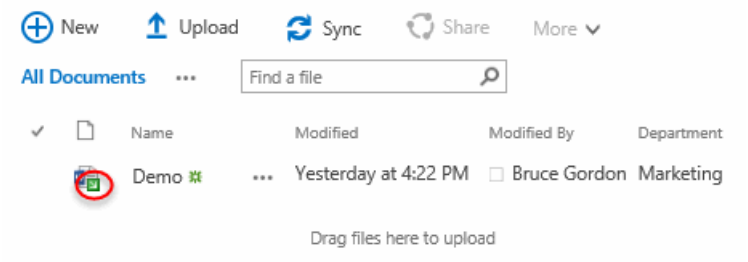
   B. Click the ellipsis button next to the title of the item then click the second ellipsis button from the balloon pop-up that opens. Click the **Advanced** sub-menu and then click the **Check Out** link in the menu to check out the document.



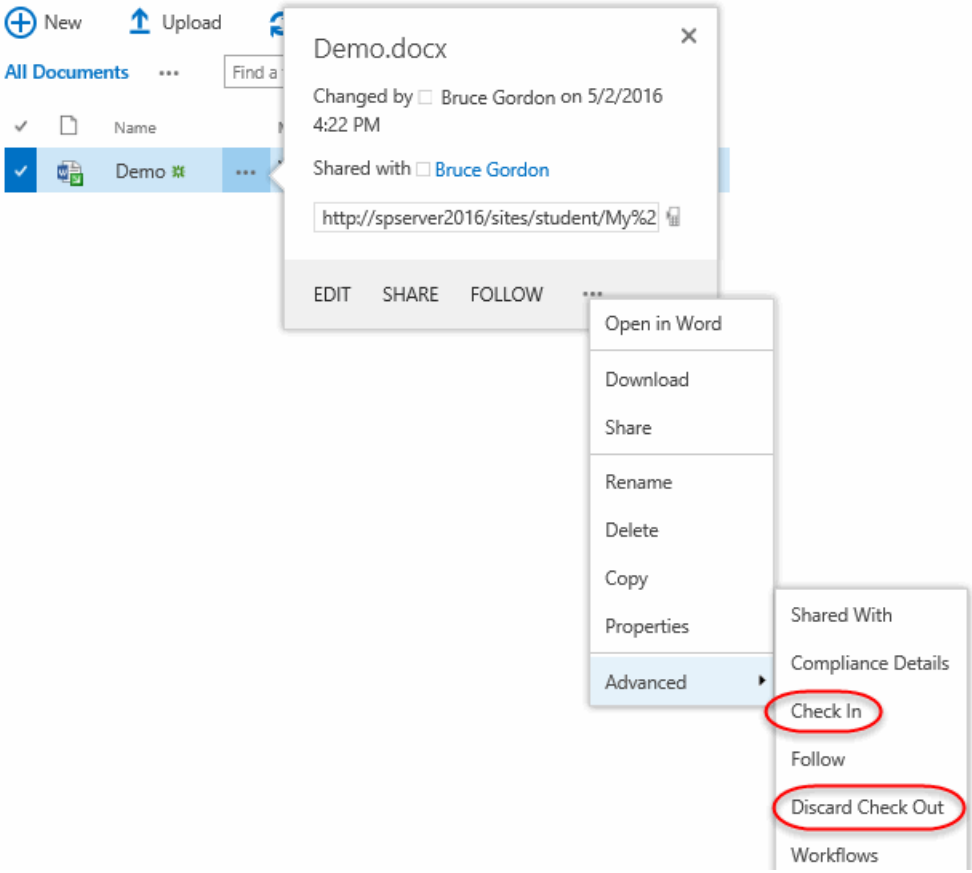
Alternative Methods

You can also use the **Files** tab toolbar in a library to check out an item. It is also possible through the library settings to require documents to be checked out when they are opened by a user for editing.

C. Note the icon that appears next to the document in the document library that indicates the file is checked out.



2. Check the file back in to **My Docs** library.
   A. Repeat the previous steps to open the item menu for the document that is currently checked out.
   B. Note that the item menu is slightly different. Instead of the menu option **Check Out**, you have two new options **Check In** and **Discard Check Out**.

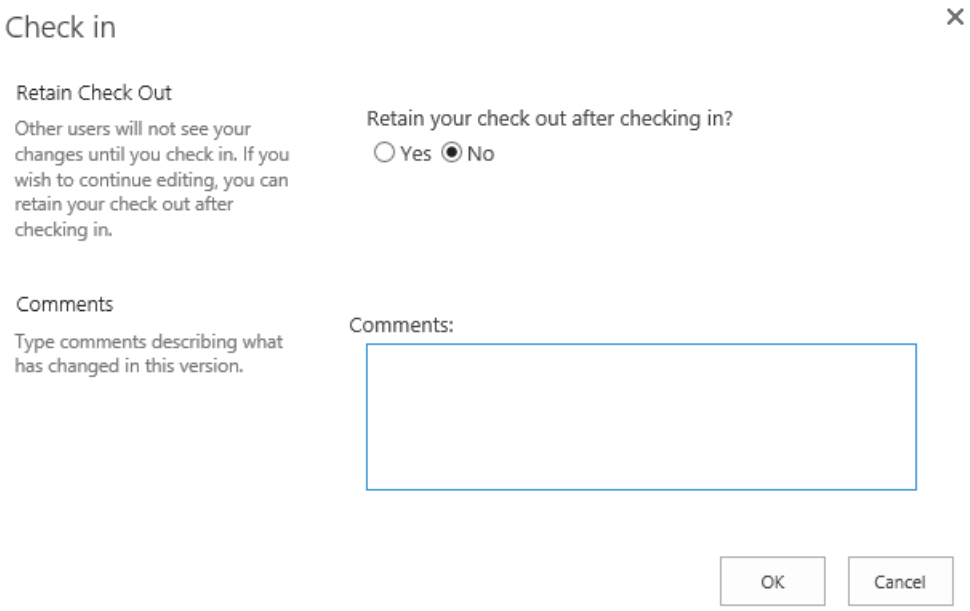


Be Careful

The **Discard Check Out** option will remove the checked-out setting from the document but you will also lose any changes that where made since the document was checked out.

C. Click the **Check In** option from the item menu.

D. In the **Check In** dialog form, note that you have the option to **Retain your check out after checking in**. Leave the option set to **No** and click the **OK** button to complete the check in.



Alternative Method

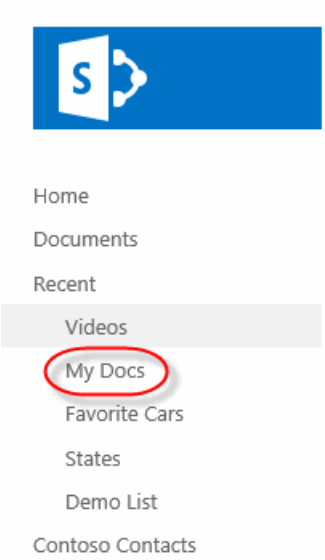
You can also use the **Files** tab toolbar in a library to check in an item.

❖ 3.3.2. Deleting and Restoring Documents

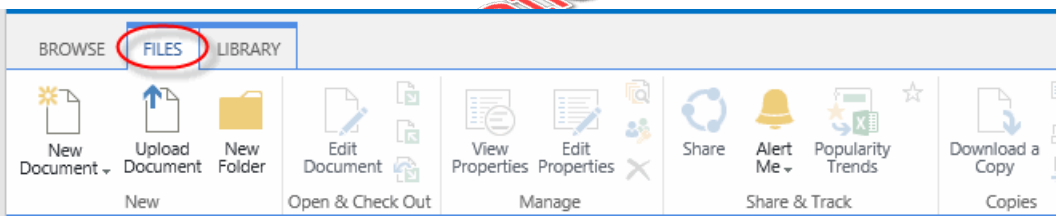
The following walk-through will show you how to delete a document from the **My Docs** library and restore it from the **Recycle Bin**.

1. Delete a file from the sites **My Docs** library.

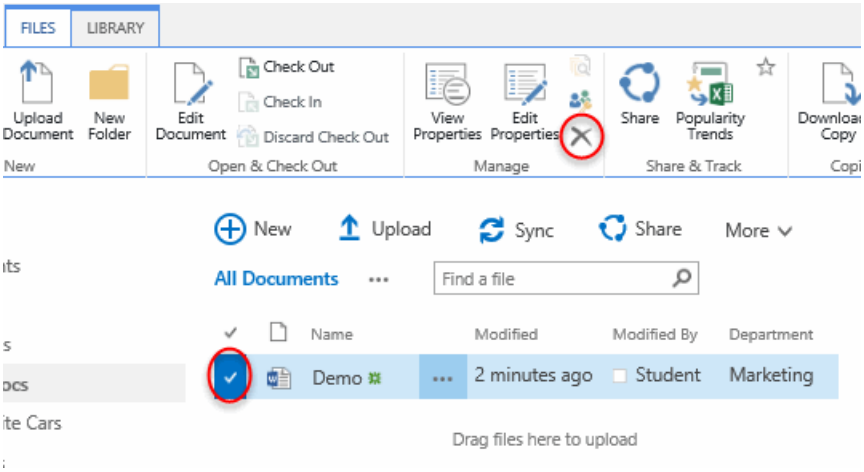
   A. Click the **My Docs** link in the **Contoso Home Site** **Quick Launch** menu.



   B. Click the **Files** tab to open the toolbar.



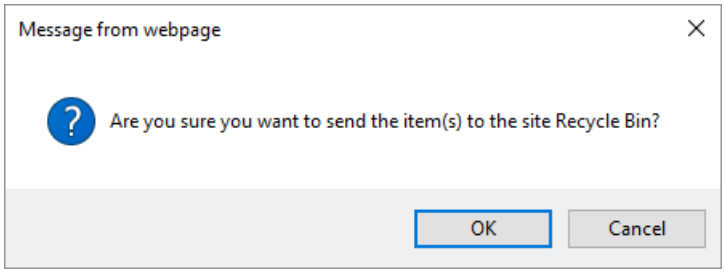
   C. Select the **Demo Doc** by clicking the **Check** box column and then click the **Delete** button in the **Files** toolbar.



Note

You can also delete files from the item menu used in the previous walk-through.

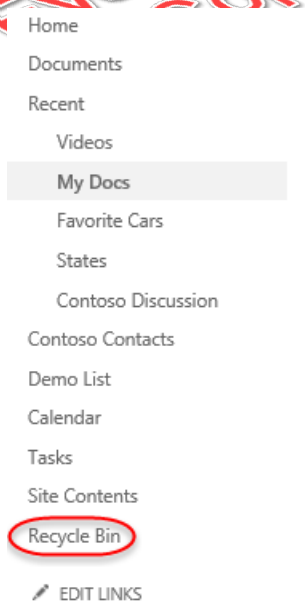
D. Click the **OK** button on the **Message from web page** dialog window asking you to verify sending the item to the Recycle Bin.



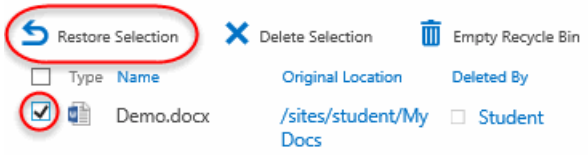
E. Verify that the **Demo Doc** has been removed from the **My Docs** library.

2. Recover the deleted **Demo Doc** document from the **Recycle Bin**.

A. Click the **Recycle Bin** link at the bottom of the **Quick Launch** menu.



B. Click to add a check to the **Check Box** in the far left column next to the **Demo Doc** item to select it and click the **Restore Selection** at the top of the list to restore the document.



Second Stage Recycle Bin
There is an optional second stage recycle bin where the Site Collection Administrator can recover items that have be removed from the main recycle bin.

C. Click the **OK** button on the dialog box to confirm you want to restore "Demo.docx".

D. Click the **My Docs** link in the **Contoso Home Site** **Quick Launch** menu and verify that **Demo Doc** is back in the library.

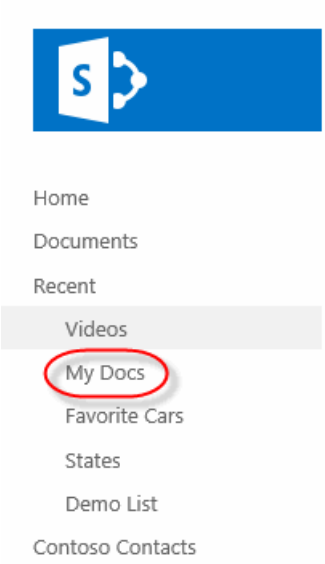
❖ 3.3.3. Versioning

Versioning can be optionally configured in SharePoint so that backup copies of any library list item are automatically created when new changes are applied. This provides the ability for users and administrators to revert to previous versions of items. With libraries you have the additional option of requiring that documents be checked out before they can be edited. This will make sure that when a user is editing a document no one else can edit the same document while it is checked out and potentially overwrite changes.

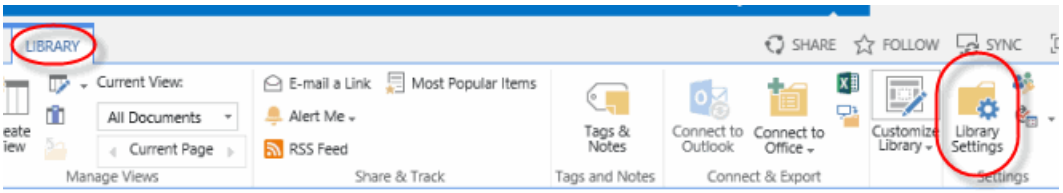
The following walk-through will show you how to turn versioning on and require documents to be checked out in the **My Docs** document library and test the results.

1. Enable versioning in the **Contoso Home Site My Docs** document library.

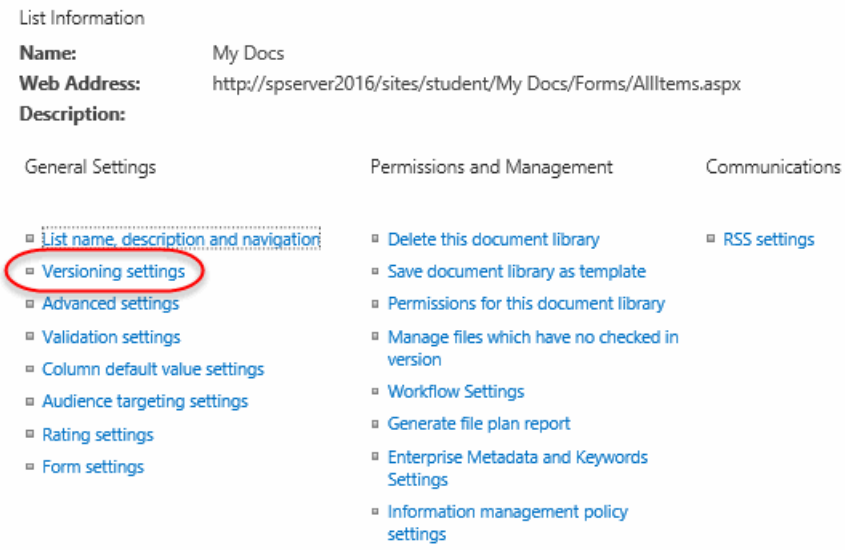
   A. Click the **My Docs** link in the **Contoso Home Site** **Quick Launch** menu.



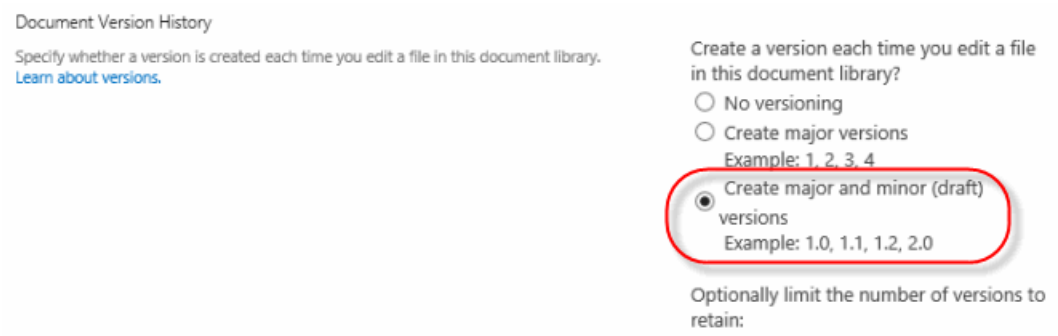
B. Click the **Library** tab to open the toolbar and then click the **Library Settings** link button.



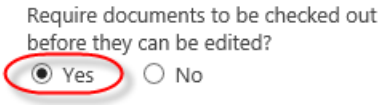
C. Click the **Versioning Settings** link within the **General Settings** region on the **Settings** page.



D. In the **Version Settings** page, click the **Create major and minor (draft) versions** option.



E. Click the **Yes** option for the **Require documents to be checked out before they can be edited** setting.



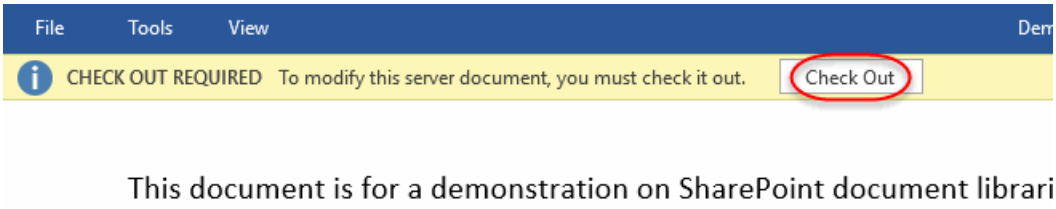
F. Click the **OK** button to save the changes.

G. Click the **My Docs** link in the **Breadcrumbs** or **Quick Launch** menu to navigate back to the **browse** view of the library.

2. Edit the **Demo Doc** document to test versioning settings.

A. Click the **Demo Doc** link in the **My Docs** library to open the file in Microsoft Word for editing.

B. Click the **Check Out** on the banner at the top of the opened Word document to allow for editing.



Why the Check Out Button?

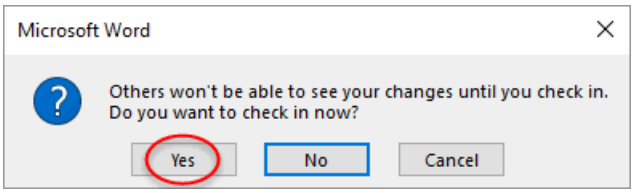
The **Check Out** button provided by Word was a result of the libraries' require check-out setting.

C. Add a new line to the document in Microsoft Word and type the following: “This line was added to test versioning.”

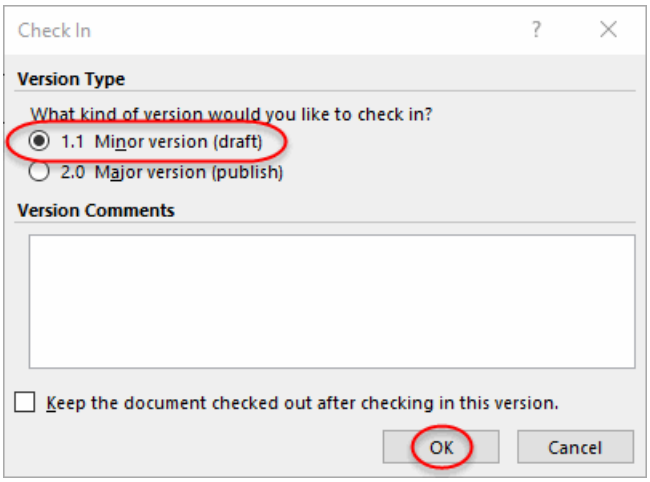
D. Click the **Save** icon at the top of the Word window.

E. Click the close icon in the upper right corner of the Word window.

F. Click the **Yes** button on the **Microsoft Word** dialog asking if you want to check in your document.



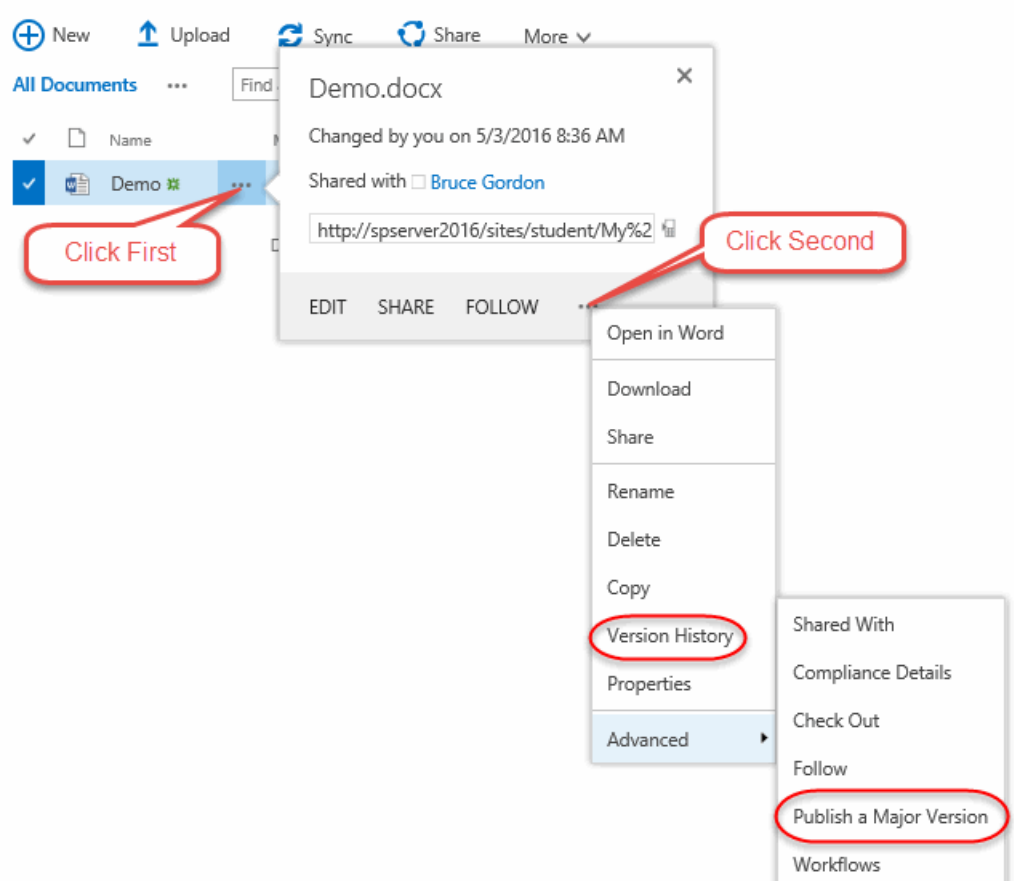
G. Leave the version set to the default of a minor version and click the **OK** button on the **Check In** dialog.



3. Restore a previous version of **Demo Doc** in the **My Docs** library.

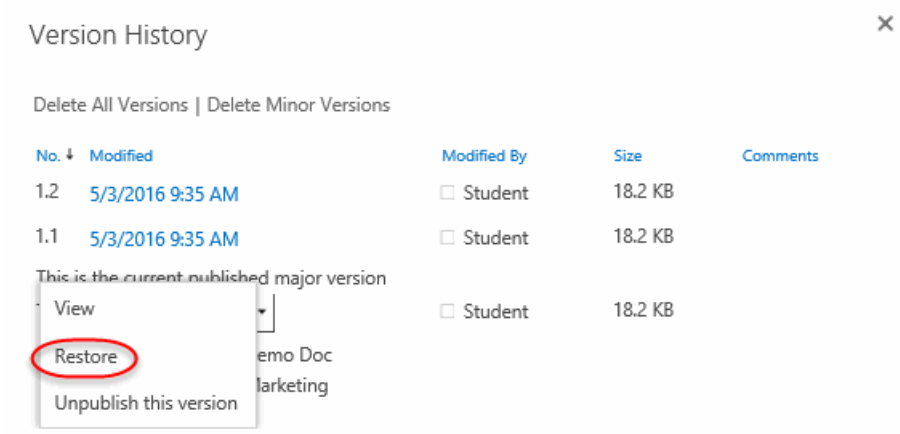
A. Use the item menu to click the **Check Out** option. Because of the library setting **Require documents to be checked out before they can be edited** you must check the document out before you can restore an earlier version.

B. Click the ellipsis button next to the **Demo Doc** item title and then click the second ellipsis in the balloon pop-up. Note that there are two new menu items dealing with versioning, **Publish a Major Version** (Under the **Advanced** sub-menu) and **Version History**. Click the menu option **Version History**.



Publish a Major Version Option
Since both major and minor version was enabled, the menu option **Publish a Major Version** is available. Clicking the **Save** icon in Word defaults to saving as a minor version. Users with **Visitor** permissions would only be able to see published major versions.

C. Hover your mouse over the date-time of the **1.0** version and click the drop-down arrow that appears to see the version menu. Select **Restore** from the **1.0** version menu.



Note

Checking the document out created the third 1.2 minor version you see in the dialog.

D. Click the **OK** button in the **Message from web page** dialog window asking you to verify replacing the current version.

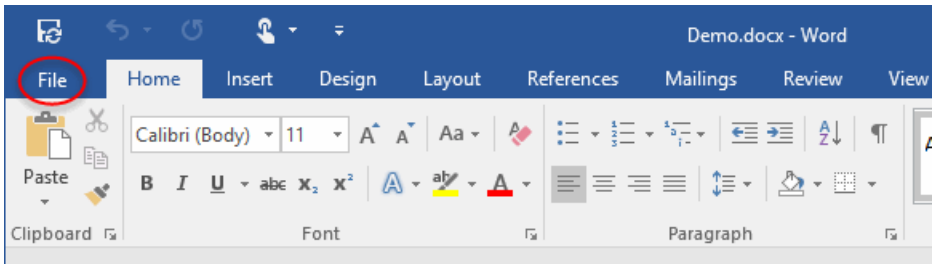
E. Close the **Version History** dialog.

F. Click the **Demo Doc** link in the **My Docs** library to open the file in Microsoft Word.

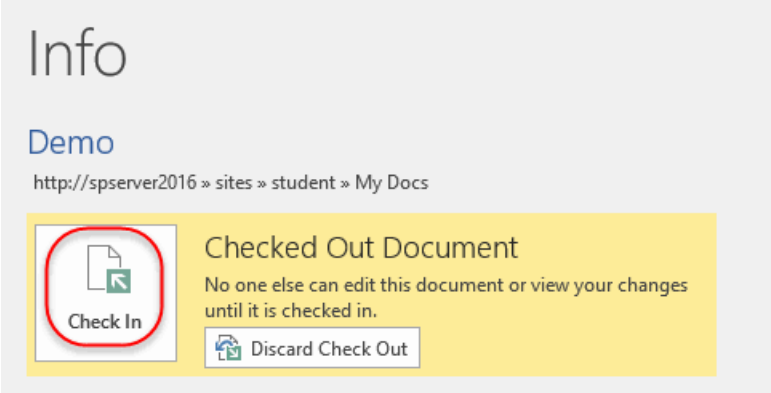
G. Verify that the changes made earlier are not in this version of the document.

4. Check the document in using Microsoft Word.

A. Click the **File** tab in the Microsoft Word toolbar.



B. Click the **Check In** button on the **Info** page of the Word document.



C. Leave the default minor version selected and click the **OK** button.

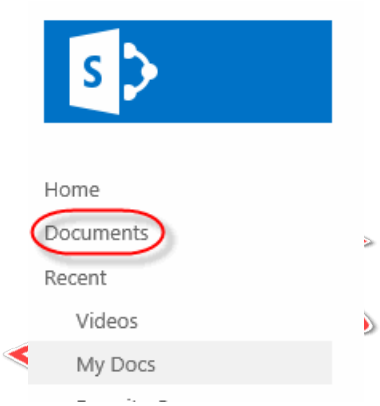
D. Close Microsoft Word.

Exercise 4: Working with Team Site Libraries

5 to 10 minutes

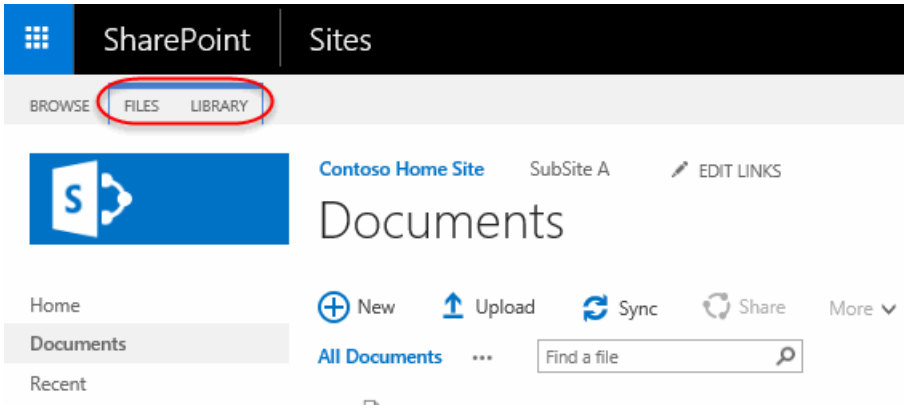
In this exercise, you will work with the default Team Site libraries.

1. Add an existing document to the **Documents** library.
   A. Click the **Documents** link within the **Quick Launch** menu.

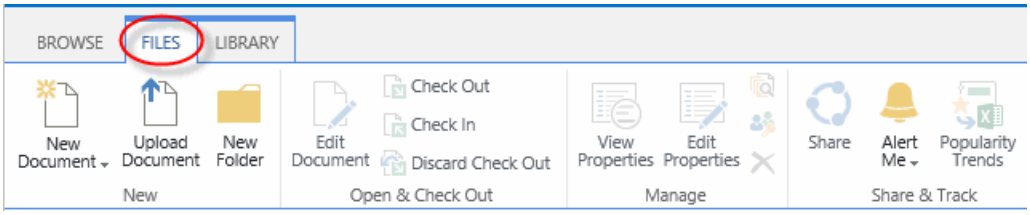


   This should take you to the default view of the library.

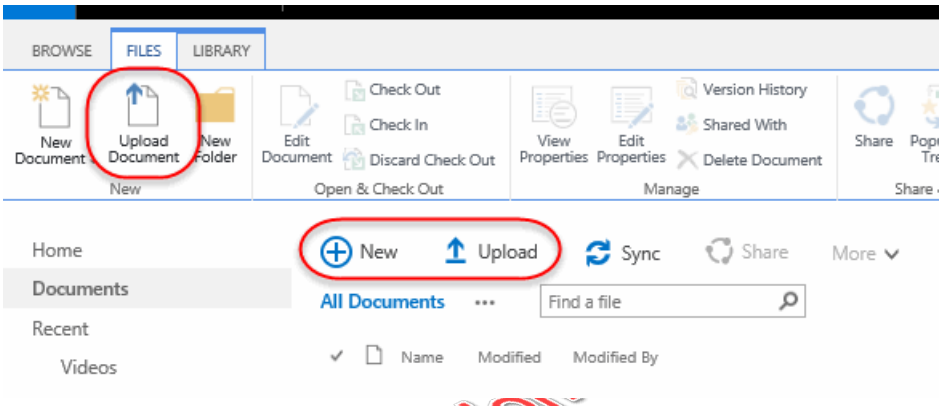
   B. Note how this library view has added a couple of new tabs, **Files** and **Library**, to the top of the page next to the **Browse** tab.



   C. Click the **Files** tab to open the toolbar.



D. Click either the **New** or **Upload** links or the **Upload Document** button.



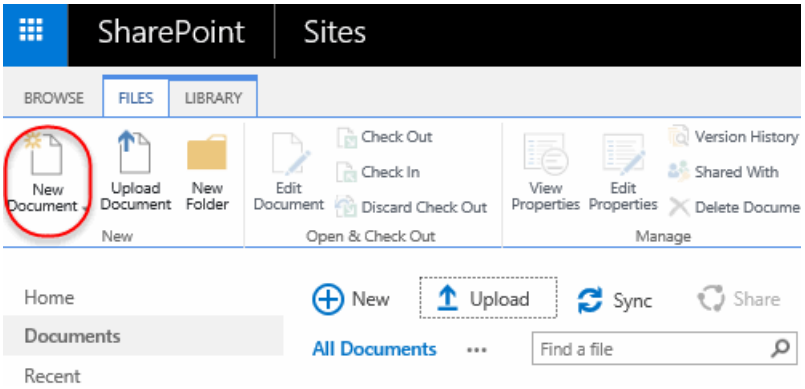
E. Click the **Browse…** button in the **Upload Document** dialog form to get the file chooser dialog window.

F. Navigate to the folder you copied the class files to and select the file `Some Random Document.docx`.

G. Click the **OK** button to complete uploading the file into **Documents** library.

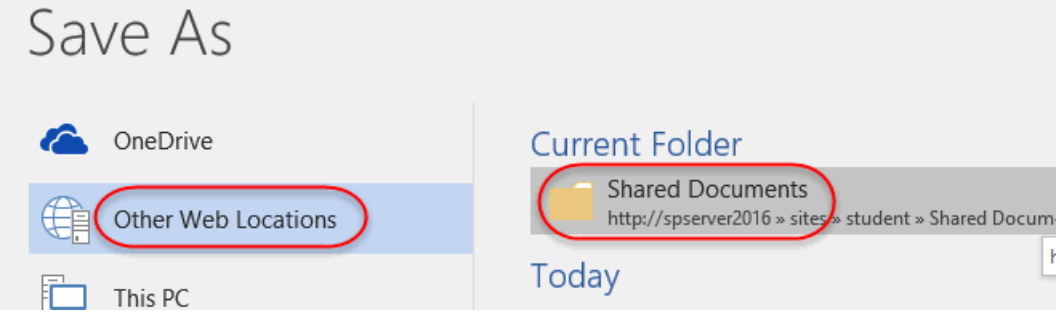
2. Create a new document directly into **Documents** library.

A. Click the **New Document** button on the **Files** tab of the **Documents** library.



B. Microsoft Word should open to a blank page. Enter the following text into the document: “SharePoint 2016 is a great collaboration product.” and click the save icon to save your changes.

C. Click the **Other Web Locations** button and then click the **Shared Documents** link under the **Current Folder** list.



D. Enter “Document for testing” as the name for the new file in the **Save As** dialog window, and click the **Save** button to save the file back to the **Documents** library.

E. Close Microsoft Word and note the new document in the library. You may need to refresh the page if you don’t see it in the list of documents.

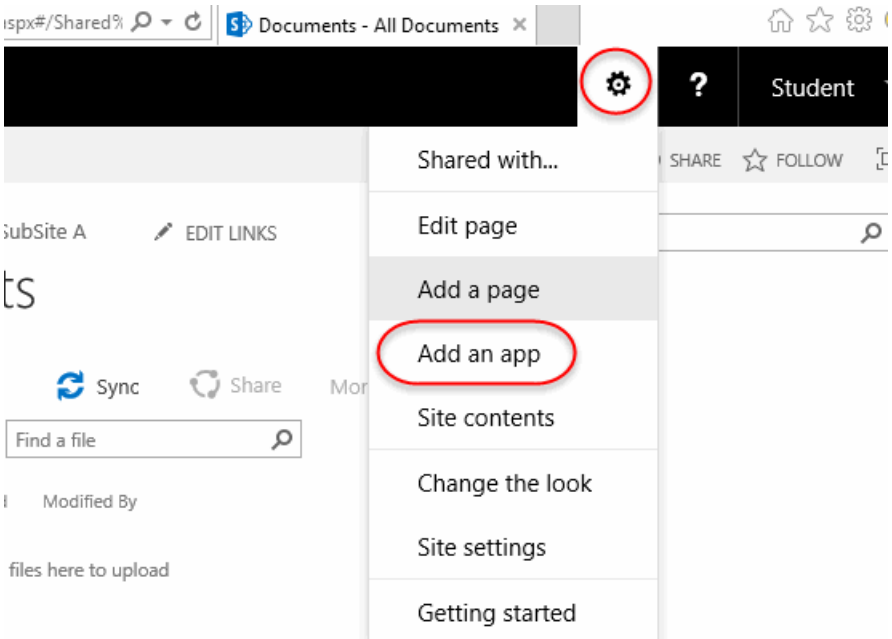
Exercise 5: Creating Libraries

5 to 10 minutes

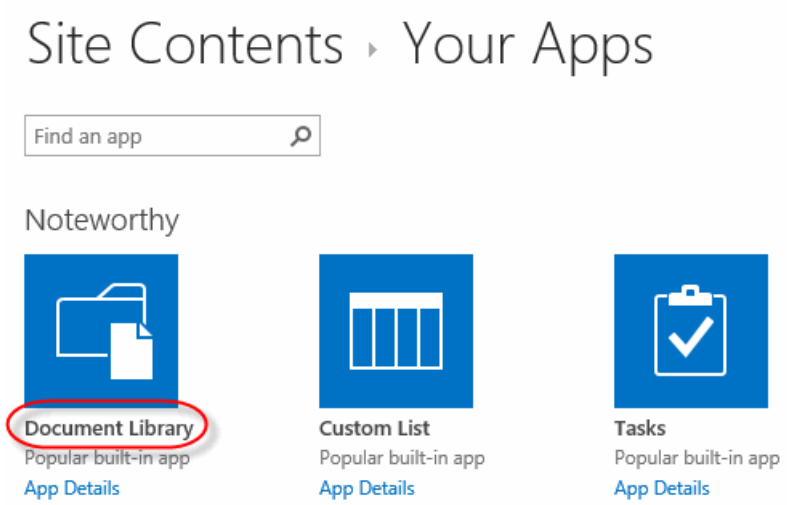
In this exercise, you will create a new library using the Document Library template. As part of creating the new Document Library, you will choose an Excel spreadsheet as the default template and verify the effect of that by creating a new document in the library.

1. Create a new library using the Document Library template.

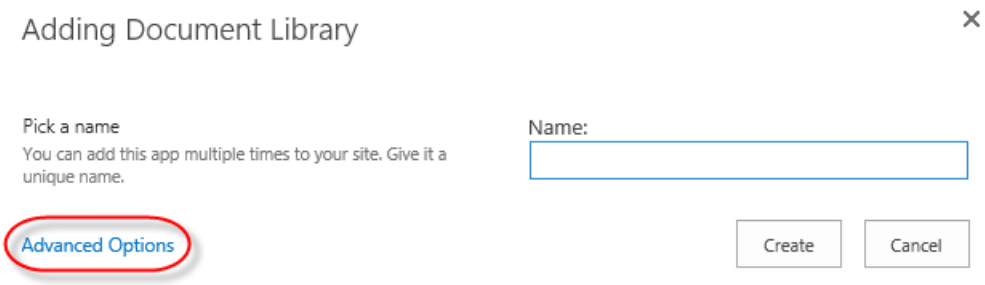
   A. Click the **Settings** menu and then choose the **Add an app** menu item.



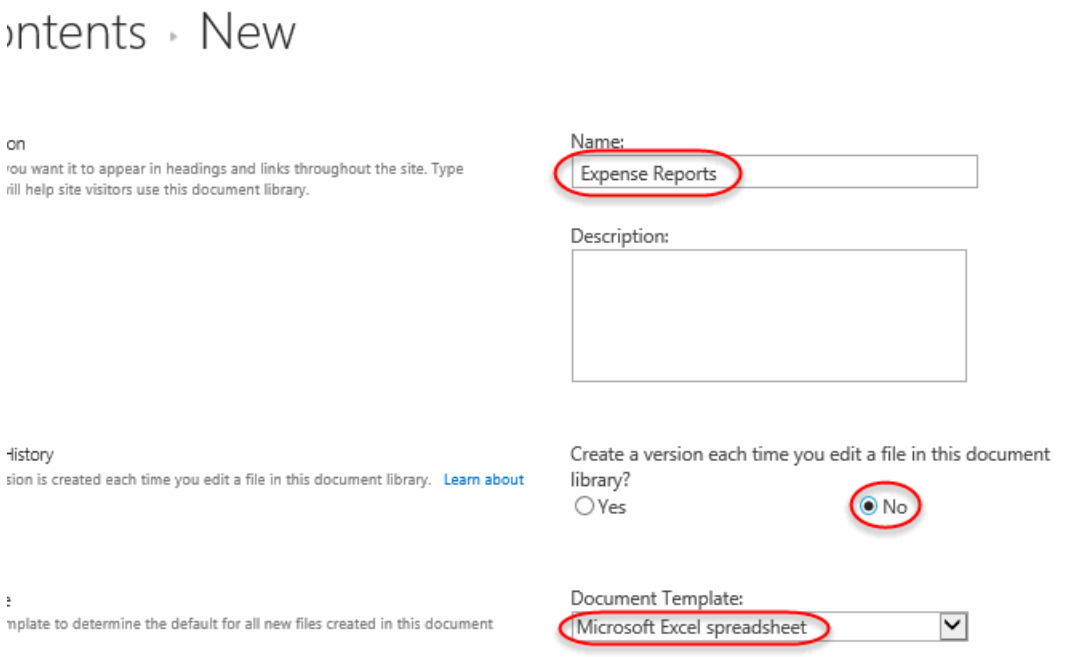
   B. Click the **Document Library** template.



C. Click the **Advanced Options** link on the **Adding Document Library** dialog.



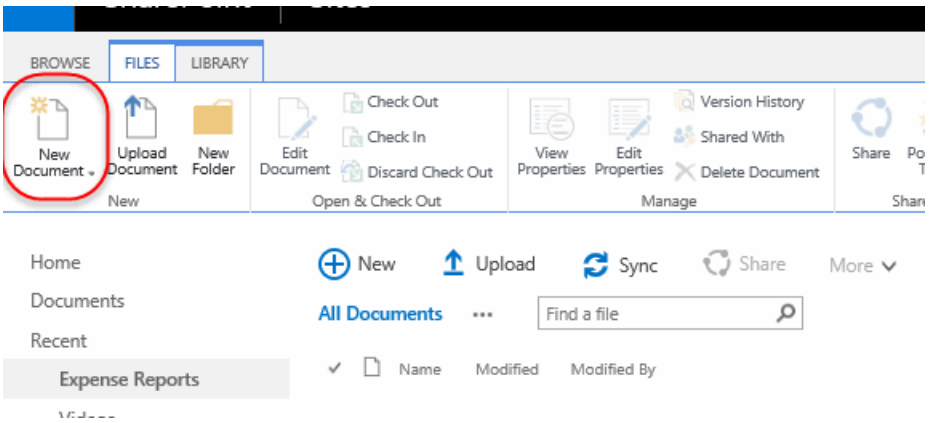
D. In the **New** form that opens enter “Expense Reports” in the **Name** field, choose **No** for the **Document Version History** and choose **Microsoft Excel spreadsheet** from the **Document Template** drop-down field.



E. Take a moment to read through the other options on the **New** form as well as the **Document Template** options. Make sure that **Microsoft Excel spreadsheet** and **No** for versioning is chosen and click the **Create** button to complete creation of the new library.

2. Create a new item in the new **Expense Reports** document library.

   A. Make sure **Expense Reports** is selected in the **Quick Launch** menu. Click the **New Document** button found in the **Files** tab toolbar.



   B. Microsoft Excel should open to a blank spreadsheet based on the **Microsoft Excel spreadsheet** template you chose when creating the **Expense Reports** library.

Looking Forward

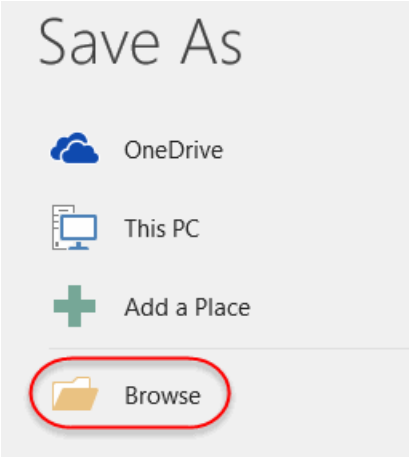
In a later part of this course, you will create custom templates and associate them with libraries.

C. Enter data into the spreadsheet, you can use the following image as an example:

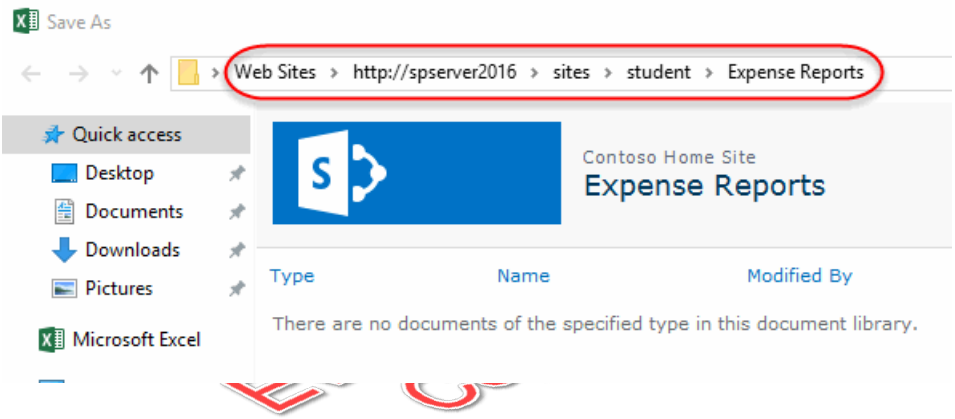
	A	B	C
1	**Student June Expenses**		
2			
3	Lunches	$300.00	
4	Travel	$500.00	
5	Entertainment	$10,800.00	
6	**Total**	**$11,600.00**	
7			

D. Click the **Save** icon at the top left of the Excel window.

E. Click the **Browse** button on the **Save As** window of Excel.



F. Excel's **Save As** dialog window will open. Note how the path is pointing to the **Expense Reports** document library on the SharePoint server and within your student site.



G. Enter “June Expenses” for the **File name** field, and then click the **Save** button to complete saving the new file.

H. Close the Microsoft Excel window. You should see your new document listed in the library, if you don’t click the **Expense Reports** link in the **Quick Launch** to refresh the page.

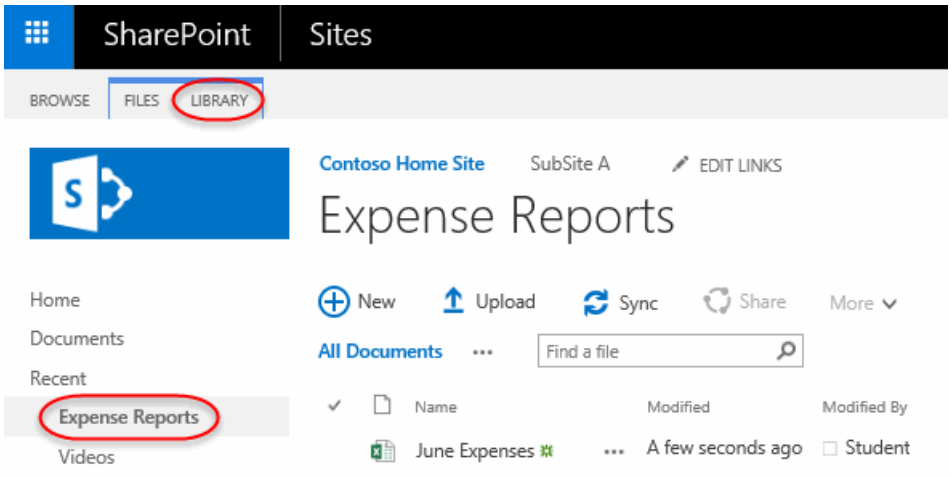
Exercise 6: Document Versioning

15 to 25 minutes

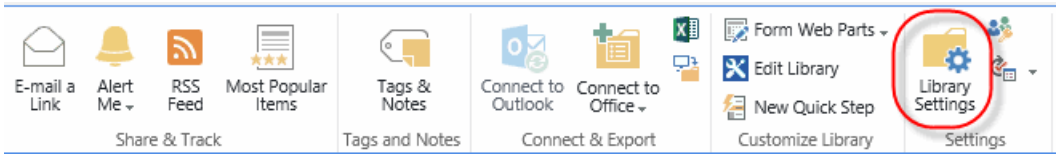
In this exercise, you will enable versioning on the Expense Reports library. Once versioning is enabled, you will test it by modifying a document and then rolling it back to a previous version to undo your changes.

1. Enable versioning on the **Expense Reports** library.

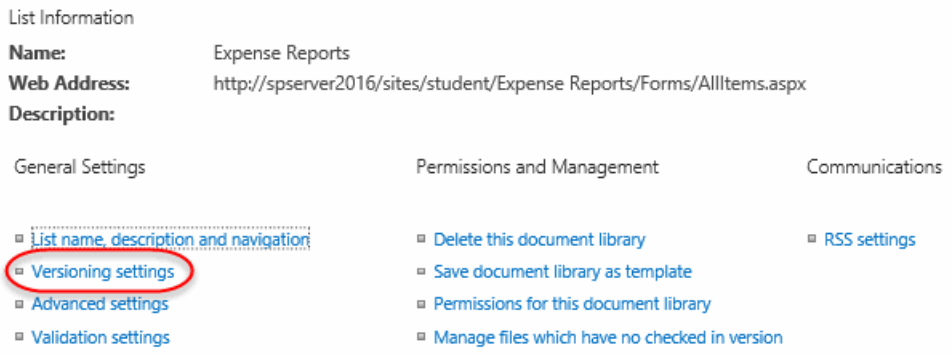
   A. Make sure **Expense Reports** is selected in the **Quick Launch** menu. Click the **Library** tab to open the toolbar.



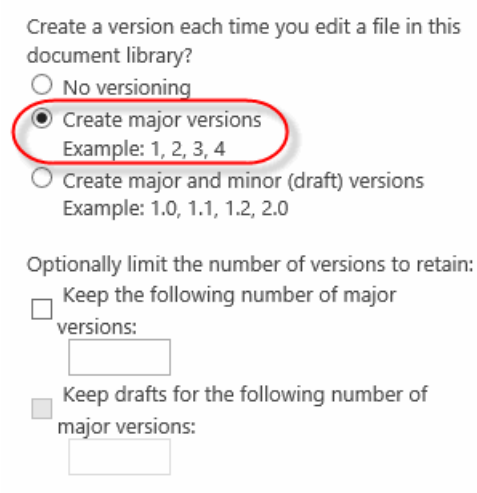
   B. Click the **Library Settings** button in the **Settings** group on the **Library** tab toolbar.



   C. Click the **Versioning settings** link within the **General Settings** group.



D. Take a moment to read through the **Versioning Settings** options. Select the option to **Create major versions** and click the **OK** button to save your changes.

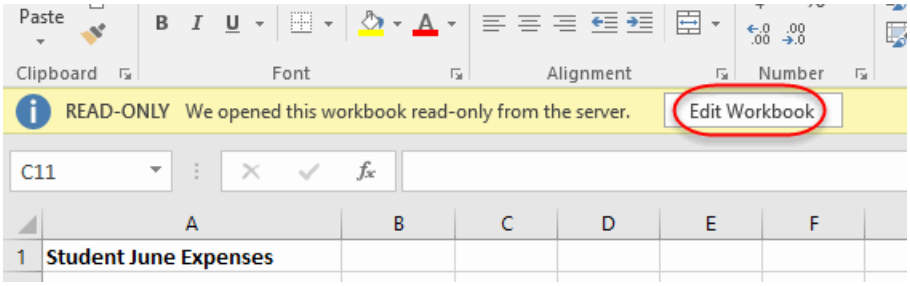


E. Click the **Expense Reports** link in either the **Quick Launch** menu or in the Site **Breadcrumbs** to navigate back to the **Browse** view of the library.

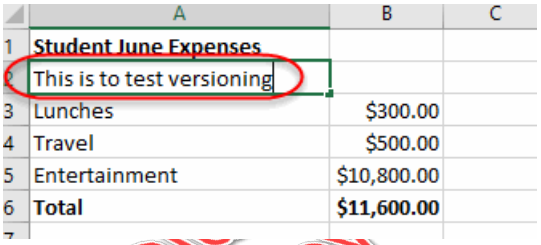
2. Edit a document in the library so that the changes will be stored with a new version of the document.

   A. Click the "June Expenses" document link in your **Expense Reports** library to open it in Microsoft Excel for editing.

   B. Click the **Edit Workbook** button in Excel to enable editing.



C. Add the following text into any empty cell in the spreadsheet: “This is to test versioning.”



	A	B	C
1	**Student June Expenses**		
2	This is to test versioning		
3	Lunches	$300.00	
4	Travel	$500.00	
5	Entertainment	$10,800.00	
6	**Total**	**$11,600.00**	

D. Click the **Save** icon at the top left of the Excel window to save your changes.

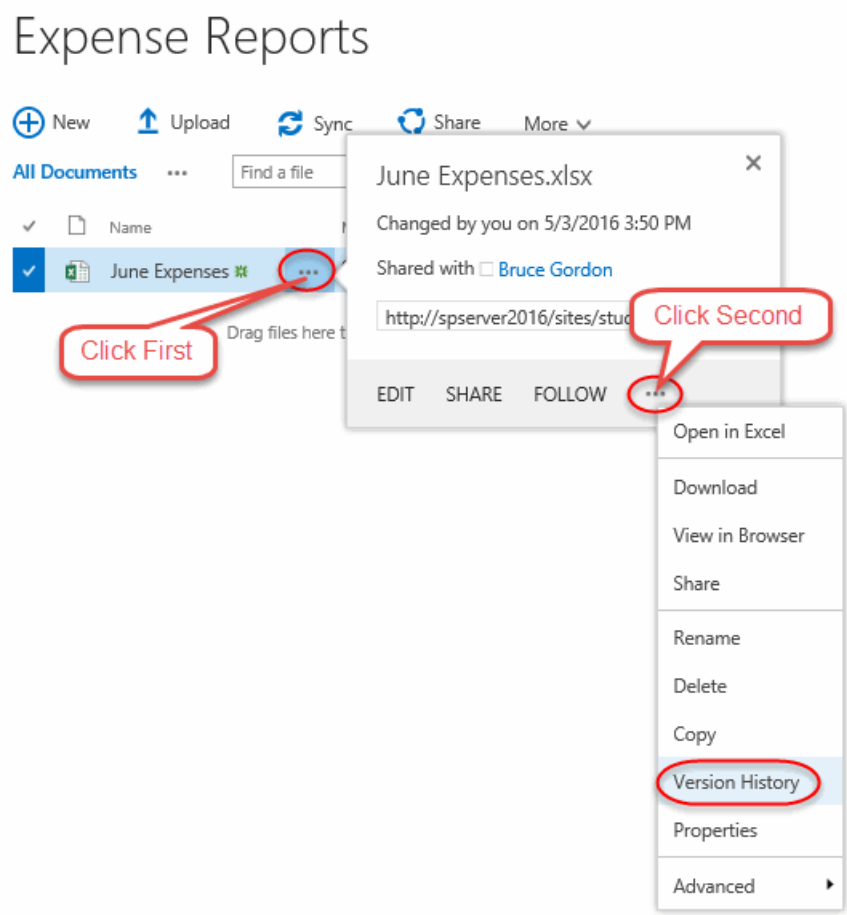
Note

If you had enabled both major and **minor** versioning, Excel would have prompted you to choose which version you wanted to create when you saved your changes.

E. Close Microsoft Excel.

3. View the version history of the document you just edited.

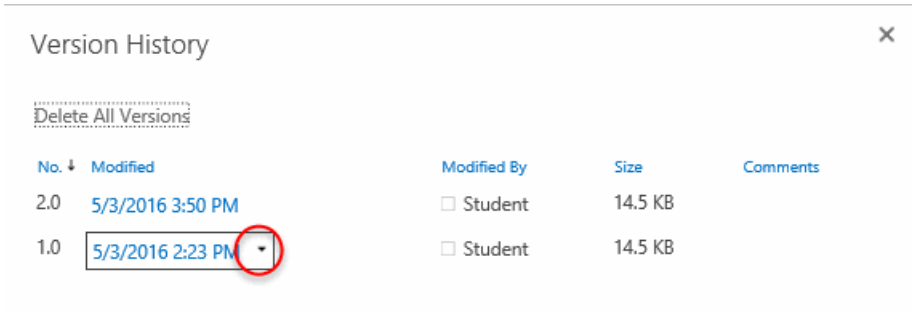
A. Click the ellipsis button next to the **June Expenses** item title and then click the second ellipsis in the balloon pop-up.



B. In the documents context menu, click the **Version History** options to open the **Version History** dialog. Note that you should have at least two versions in the **Version History** dialog.

4. Revert to a previous version of the document.

   A. Hover over the version 1.0 date column in the **Version History** list and click the arrow that appears next to it to access its options menu.



B. From the 1.0 versions options menu select the **Restore** option.

C. In the Message from web page dialog box, click the **OK** button to replace the current version with the older version.

D. Note how the **Version History** dialog shows a new third version that is really a copy of the first version.

E. Close the **Version History** dialog.

F. Click the link of the spreadsheet you just reverted to open it in Microsoft Excel and verify that it has been restored to its earliest version.

G. Close Microsoft Excel once you are done verifying the restored document.

Conclusion

In this lesson, you have learned:

- How to create new libraries using library templates.
- How to work with the different libraries in a default Team Site.
- How to add columns to a library.
- How to check out documents for editing.
- How to delete and restore documents from document libraries.
- How to enable versioning on a library.
- How to revert a library document to an earlier version.

LESSON 4
Working with Lists and Library Views

Topics Covered

☑ Default views built into lists and libraries.

☑ Personal views.

☑ Shared views.

☑ Configuring views.

☑ Setting the default view for a list or library.

Introduction

Views provide a flexible system to display SharePoint list and library data in an easy-to-read and easy-to-use manner. Every SharePoint list and library can have multiple views created and configured, and some list and library templates come with special views preconfigured. Views can be defined for personal use or shared use.

4.1. Default Views

❖ 4.1.1. Explore Default Views

The following walk-through will explore some of the default views and how to use them. The walk-through will also explore how to manage existing views. This walk-through depends on the Tasks list created during an earlier walk-through.

1. The first thing to do is create a couple of items in the **Tasks** list in order to have something to display in the views.
   A. Click the **Tasks** link in the **Quick Launch** menu.
   B. Click the **new task** link in the list to open the **Tasks - New Item** form and click the **SHOW MORE** link. Use the following table for information to fill in the form:

Task 1

Field	Data
Title:	Type “Complete SharePoint End User course”
Priority:	Select **(2) Normal**
Status:	Select **In Progress**
% Complete	Type “50”
Assigned To:	Enter the SharePoint account you are currently logged in with
Description:	Type “SharePoint 2016 End User 3 day course”
Start Date:	Select (Date course started)
Due Date:	Select (Date course ends)

C. Click the **Save** button on the **Tasks - New Item** dialog to save the task to the **Tasks** list.

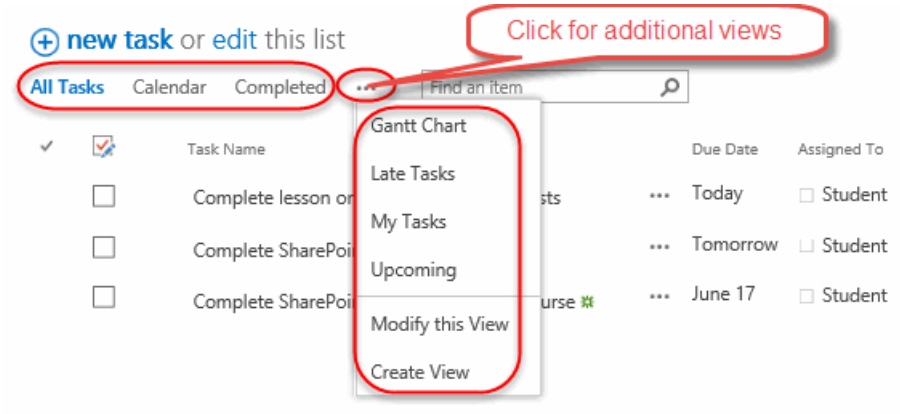
D. Repeat the previous two steps with the following information to create a second task item:

Task 2

Field	Data
Title:	Type “Complete SharePoint 2016 Power User Course”
Priority:	Select **(2) Normal**
Status:	Select **Not Started**
% Complete	Type “0”
Assigned To:	Enter the SharePoint account you are currently logged in with
Description:	Type “SharePoint Power User 2 day course”
Start Date:	Select (1 month from current date)
Due Date:	Select (1 day from Start Date)

2. Explore the ways to navigate to views in a list or library.

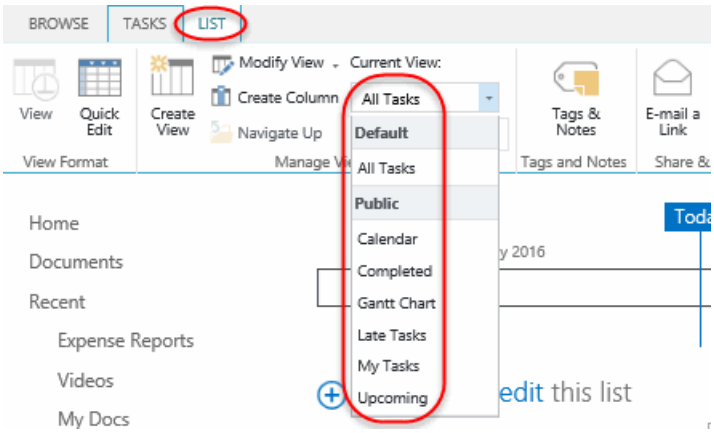
   A. Select the desired view from the links along the top of the list or additional views available by clicking the ellipsis button.



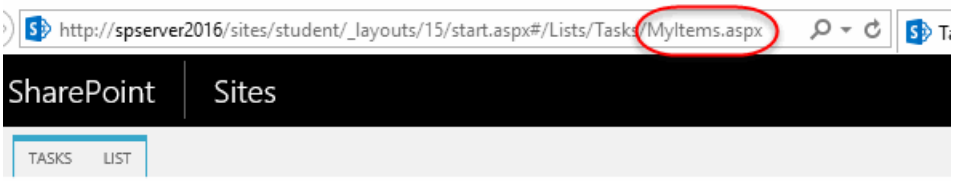
Note

The views are security trimmed. This means that, if the account does not have permissions to create or modify a view, those options will not be listed.

B. Select the view from the drop-down list on the **List** tab toolbar within the **Manage Views** region.

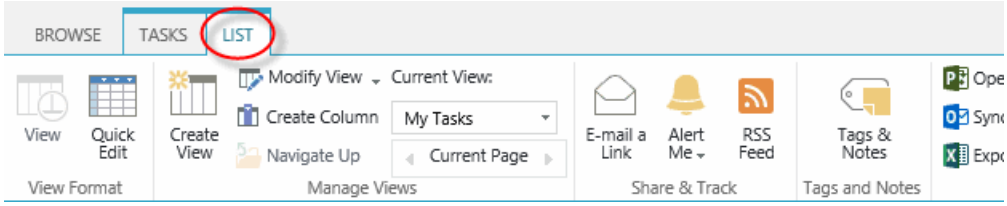


C. You can also type the URL path to a view since each view corresponds to a unique ASPX file. This can be useful if you want to create a link directly to a view. The following image shows the URL of the **My Tasks** view of the **Tasks** list.

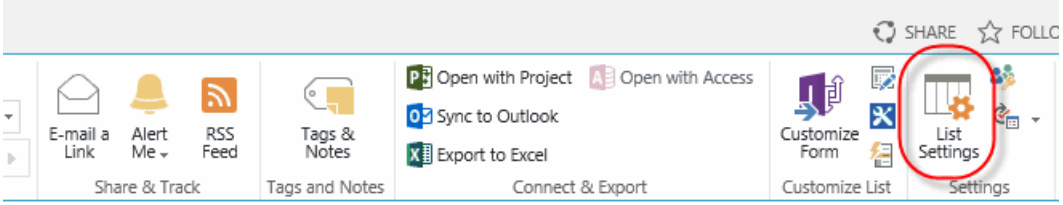


3. Manage the views for the **Tasks** list.

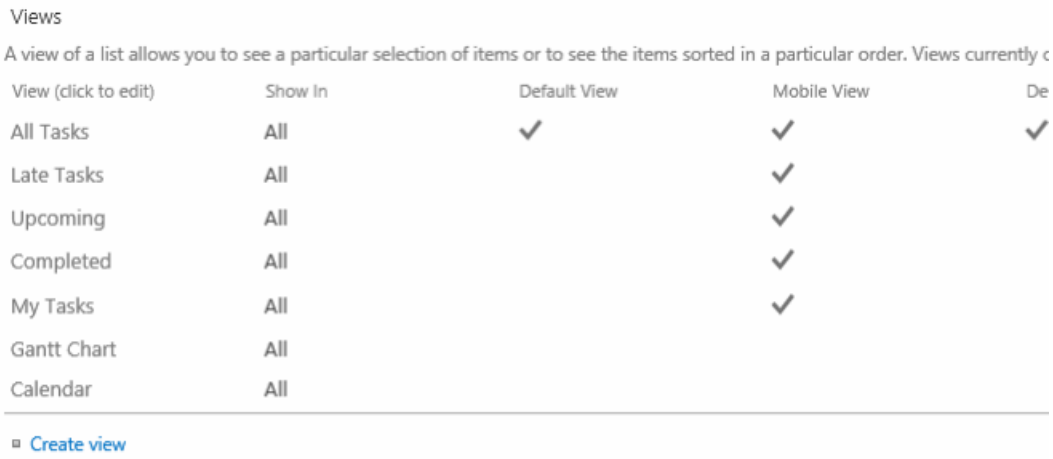
   A. Click the **List** tab for the **Tasks** list to open the toolbar.



   B. Click the **List Settings** button on the **List** tab toolbar.



   C. Scroll down the **List Settings** page and note the **Views** region.



Views

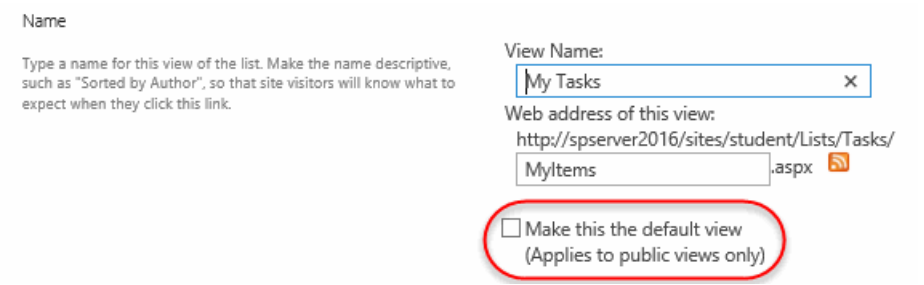
A view of a list allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently c

View (click to edit)	Show In	Default View	Mobile View	De
All Tasks	All	✓	✓	✓
Late Tasks	All		✓	
Upcoming	All		✓	
Completed	All		✓	
My Tasks	All		✓	
Gantt Chart	All			
Calendar	All			

Create view

   D. Click the **My Tasks** link from within the **Views** region to open the **Edit View** page for **My Tasks**.

E. Note the option to **Make this the default view** as well as the view's page name.



Note

You will learn how to work with most of the rest of the views settings in the next walk-through on how to build a custom view.

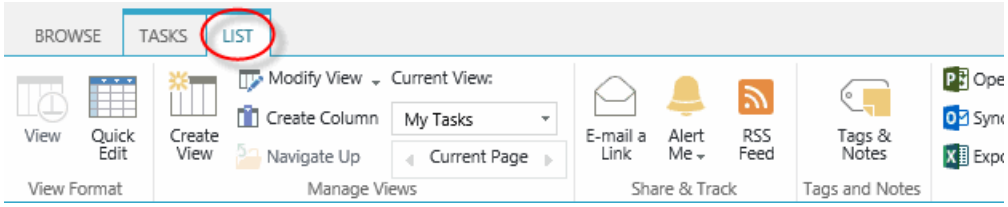
F. Click the **Cancel** button at the top of the page but also note the **Delete** button that can be used to delete a view if the user has sufficient permissions.

4.2. Custom Views

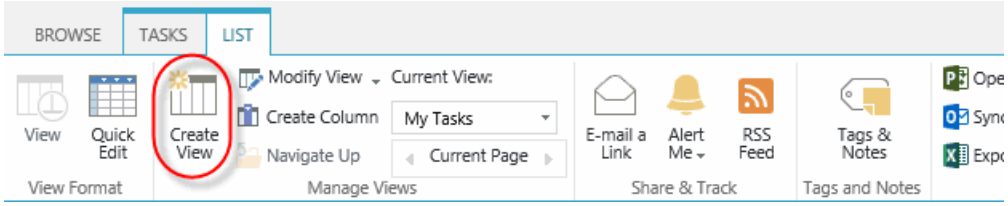
❖ 4.2.1. How to Create a Custom View

The following walk-through will show you how to create a custom view using the default **Tasks** list.

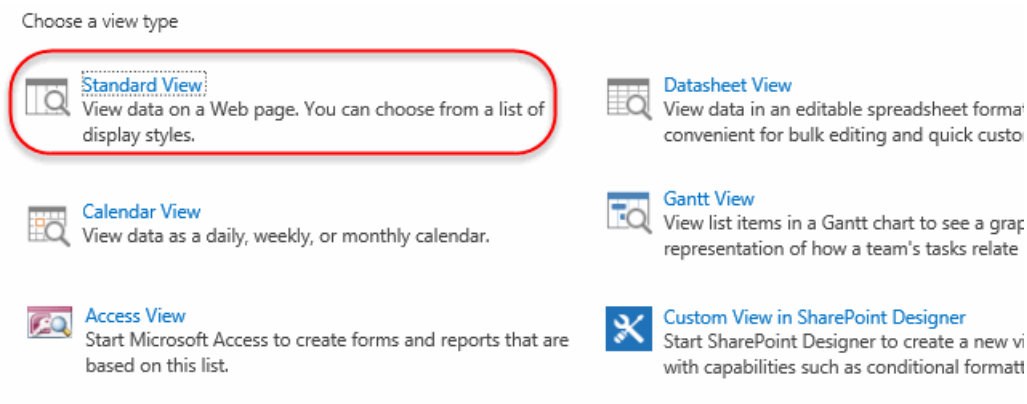
1. Create a custom view of **Tasks** using the **Standard View** format.
   A. Navigate to the **Tasks** list of the site by clicking the **Tasks** link in the **Quick Launch** menu.
   B. Click the **List** tab to open the toolbar.



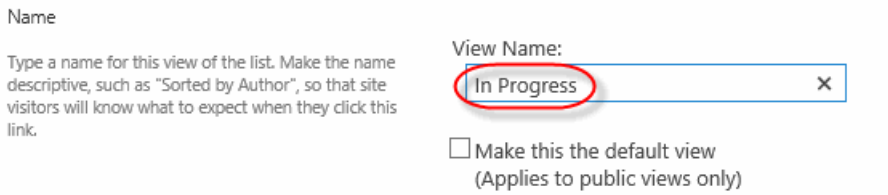
C. Click the **Create View** button on the **List** tab toolbar.



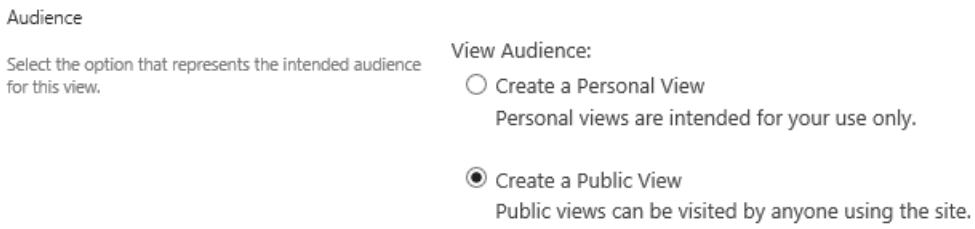
D. Click **Standard View** from the **Choose a view type** region.



E. Type “In Progress” in the **View Name** field.



F. Leave the **Create a Public View** setting in the **Audience** region but note the option to **Create a Personal View**.

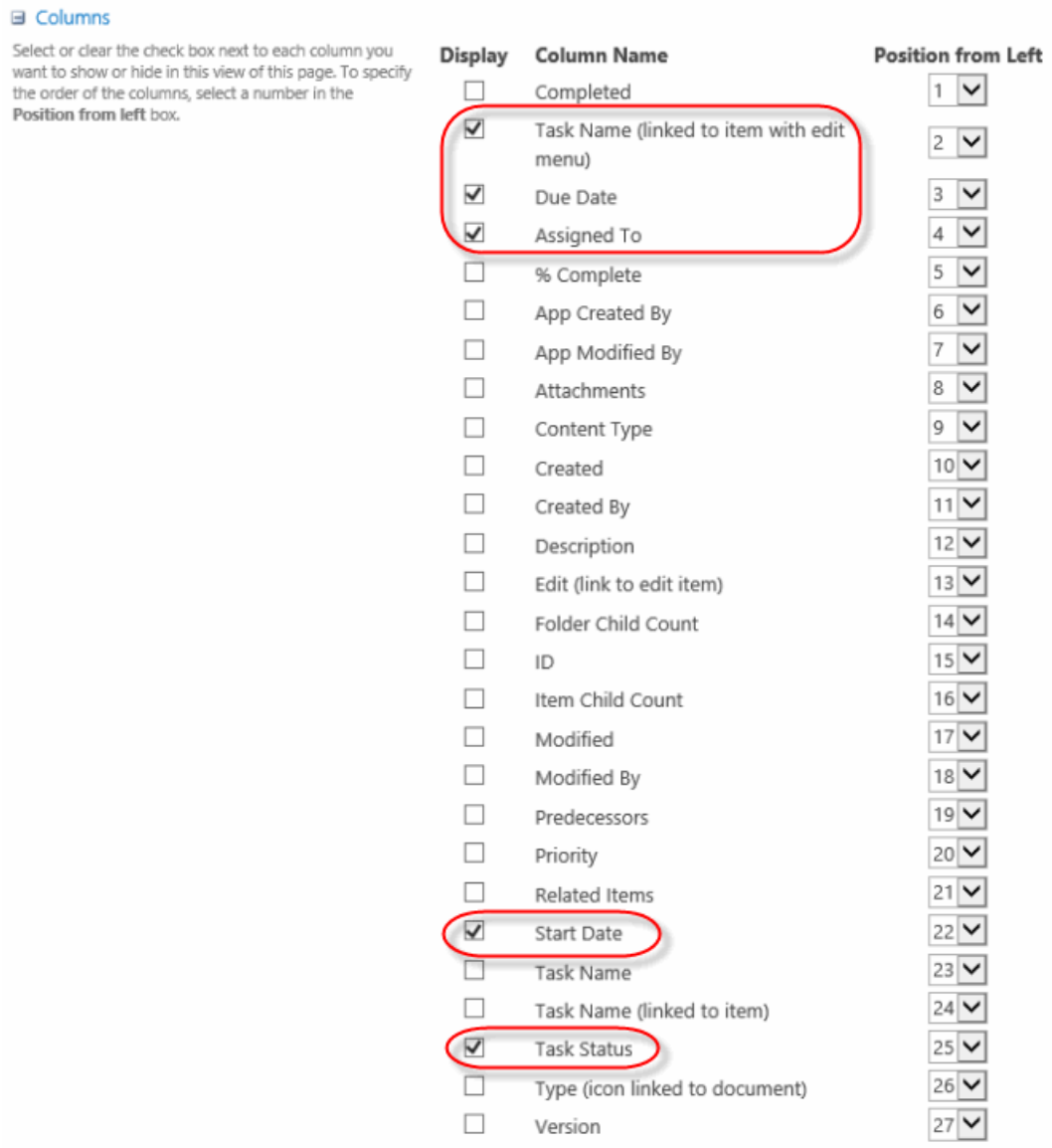


Permissions

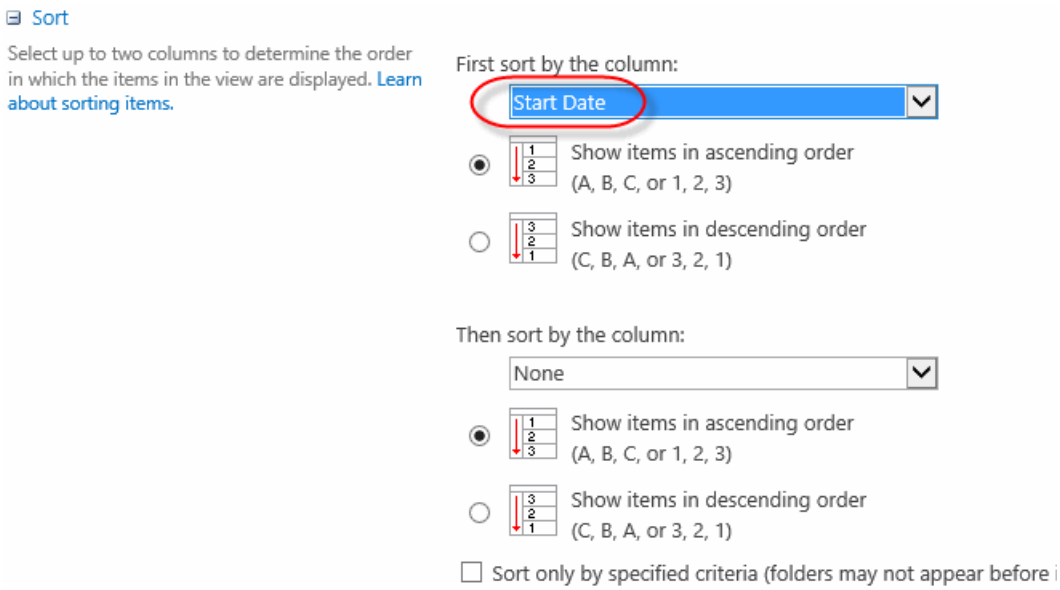
If a user does not have permission to create a public view, the option is grayed out. In a later exercise, you will create both a personal view and a public view. Permissions are covered in a later part of this course.

G. Select the following from the **Columns** region; everything else should be deselected.

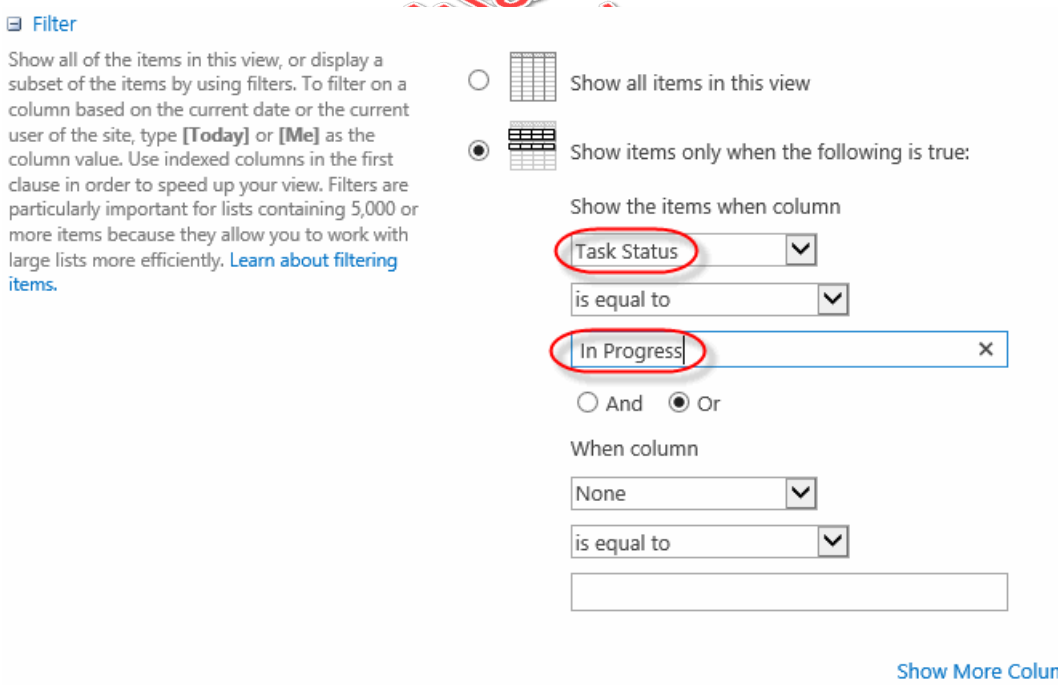
- Task Name
- Assigned To
- Task Status
- Due Date
- Start Date



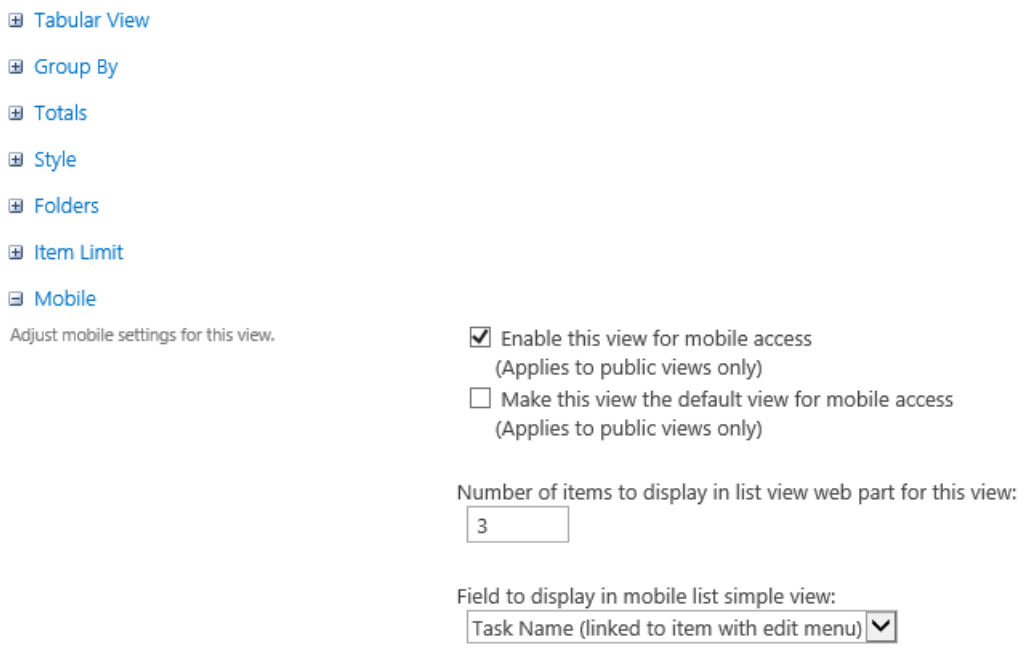
H. Select **Start Date** for the **First sort by the column** selection under the **Sort** region.



I. Select **Status** for the **Show the items when column** selection under the **Filter** region. Leave the **operator** drop-down set to **is equal to** and type `In Progress` in the **value** field text box.

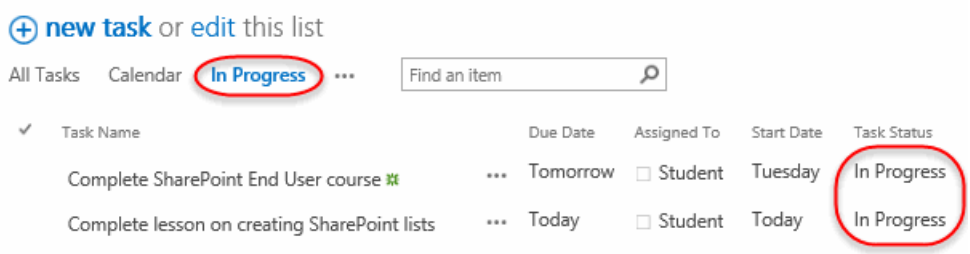


J. Note the remaining view options and their collapsed regions but leave them at their default settings.



K. Click the **OK** button at the bottom of the form to complete creating the public view.

2. Once the new view has been successfully created, SharePoint will automatically navigate you back to the **Browse** tab with the new view **In Progress** selected. The tasks listed should only include tasks that have their **Status** field set to **In Progress**



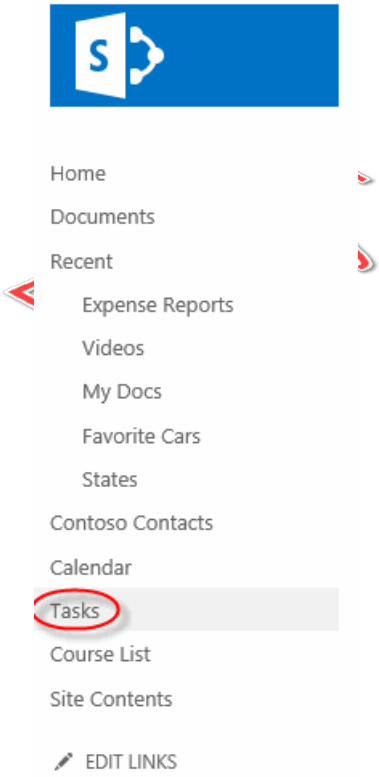
3. Click the **Tasks** link in the **Quick Launch** and note how the view is reset back to the default **All Tasks**. You could optionally set the custom view **In Progress** as the default view for the list.

Exercise 7: Working with Views

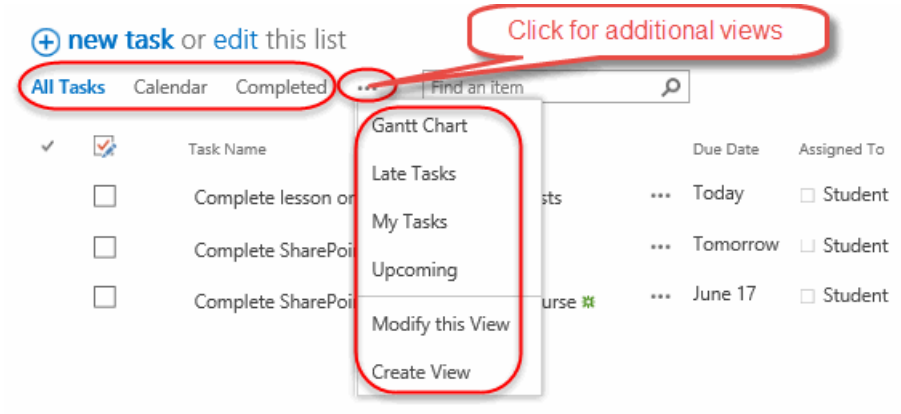
15 to 25 minutes

In this exercise, you will work with list and library views. You will test the default views that come with list and library templates.

1. Explore the default views of the **Tasks** list.
   A. Click the **Tasks** list link within the **Quick Launch** menu.



   B. Select the desired view from the links along the top of the list or additional views available by clicking the ellipsis button.



Note

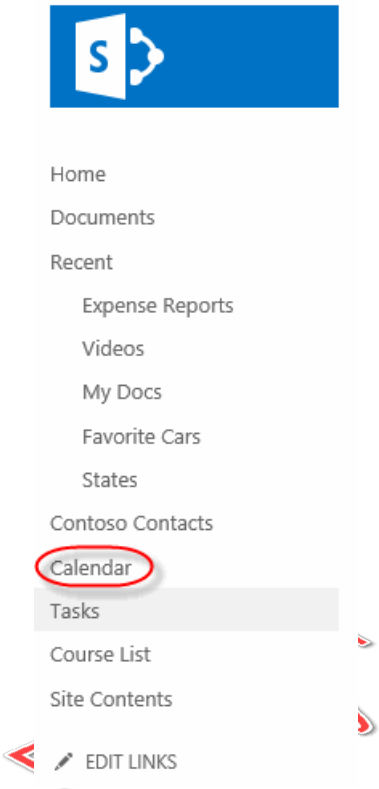
The views are security trimmed. This means that, if the account does not have permissions to create or modify a view, those options will not be listed.

C. Click the **My Tasks** link from the list views menu. The **Tasks** list will now be filtered to show only tasks that are assigned to you.

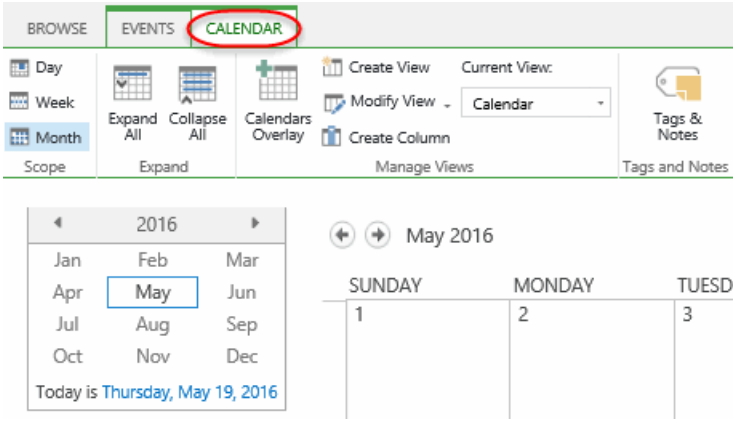
D. Take a few minutes to click each of the different views available in the **Tasks** list.

2. Explore the default views of the **Calendar** list.

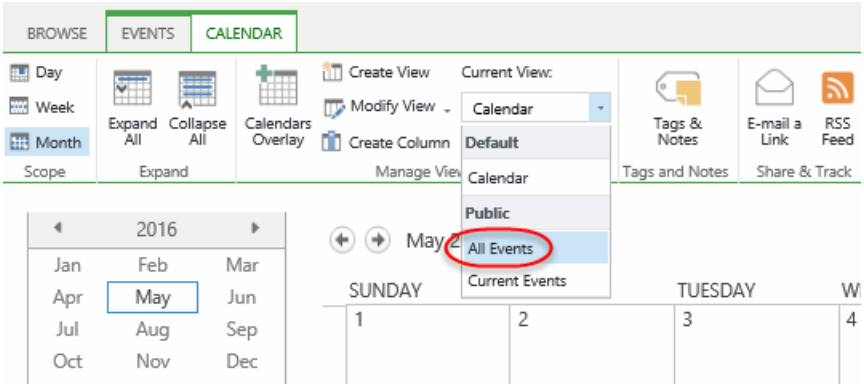
   A. Click the **Calendar** list link within the **Quick Launch** menu.



B. The calendar list does not display the views from the main **Calendar** view. To choose alternate views, click the **Calendar** tab to open the toolbar.



C. Click the **All Events** link from the list views menu.

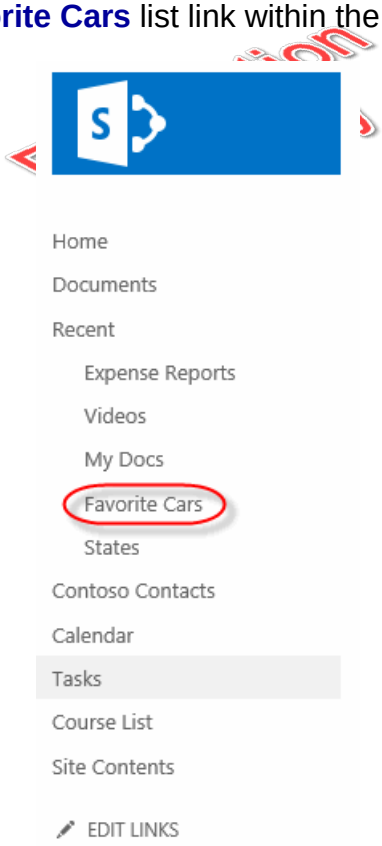


D. The **Calendar** list will now display all events in a more traditional list-like table view.

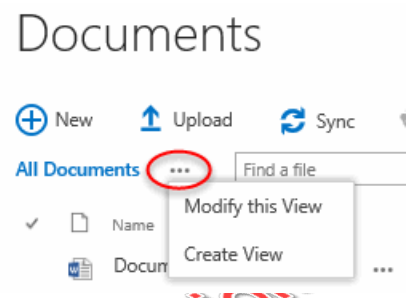
E. Take a few minutes to click each of the different views available in the **Calendar** list.

3. Explore the default view of the custom **Favorite Cars** list.

   A. Click the **Favorite Cars** list link within the **Quick Launch** menu.



B. Click the ellipsis button next to the **All Items** link to open the **Favorite Cars** list views menu.



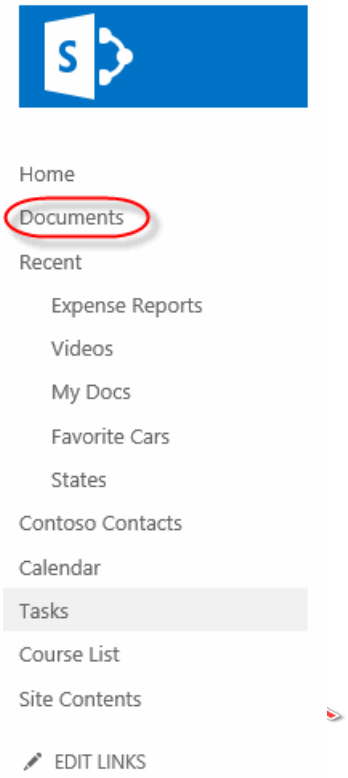
Note

Alternatively, you can use the **List** tab in the **List Tools**. There is a **Manage Views** group on the **Favorite Cars** tabs toolbar.

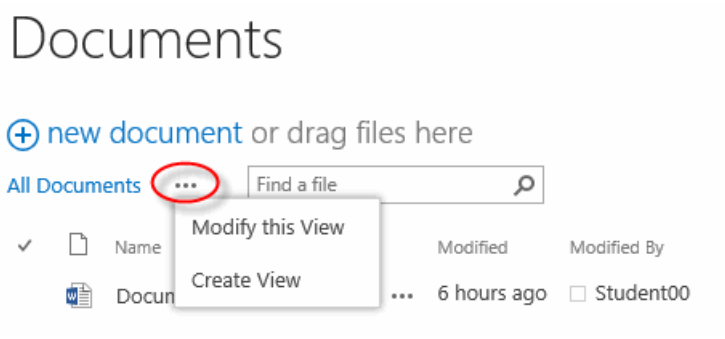
C. Note that the current view, **All Items** is the only view created by default for lists based on the **Custom List** template.

4. Explore the default view of the **Documents** library.

   A. Click the **Documents** library link within the **Quick Launch** menu.



B. Click the ellipsis button next to the **All Documents** link to open the **Documents** library views menu.



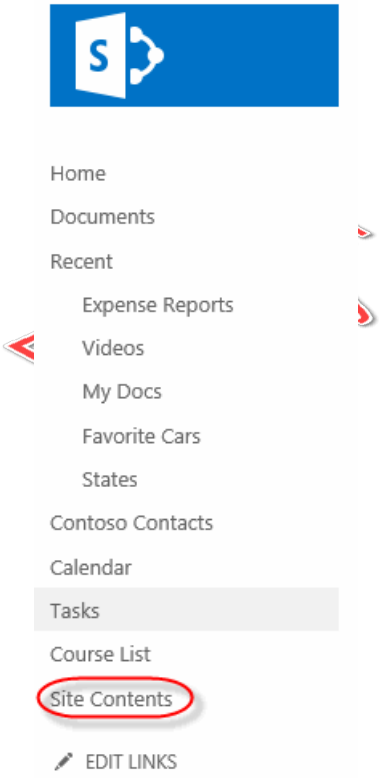
Note

Alternatively, you can use the **Library** tab in the **Library Tools**. There is a **Manage Views** group on the **Documents** tabs toolbar.

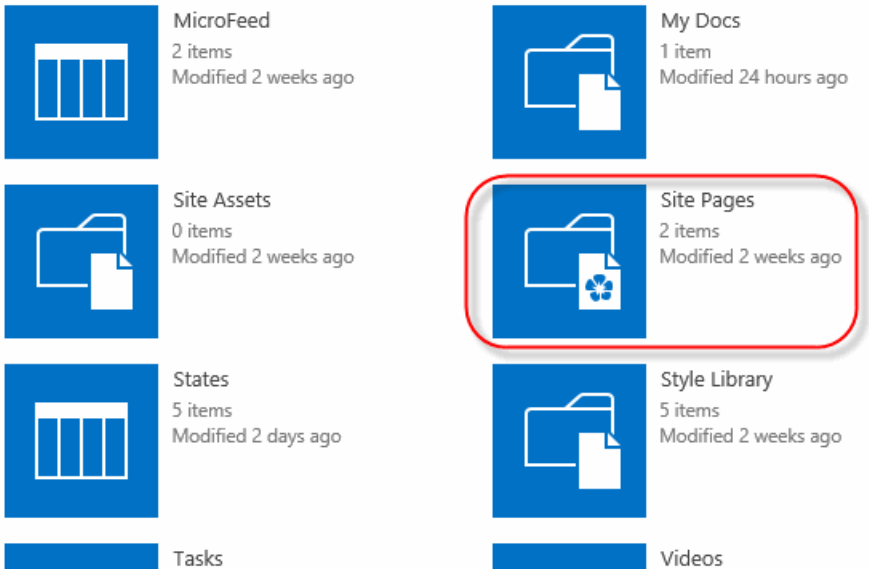
C. Note that the current view, **All Documents** is the only view created by default for libraries based on the **Document Library** template.

5. Explore the default views of the **Site Pages** library.

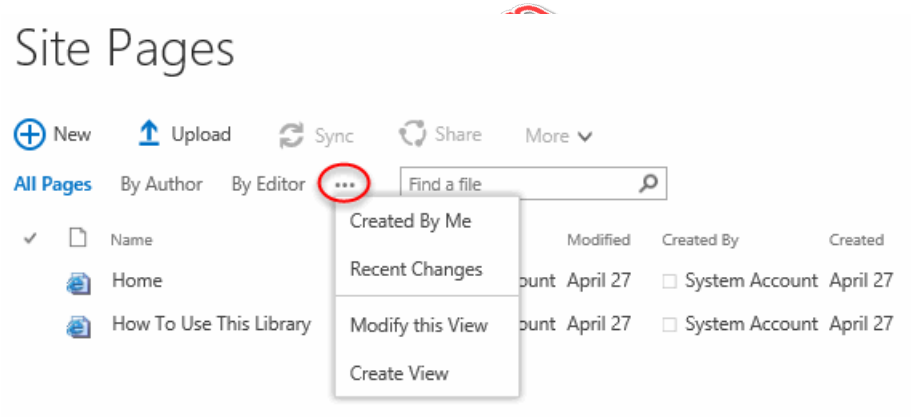
   A. The **Site Pages** library link is not listed on the **Quick Launch** menu by default. To get to **Site Pages**, click the **Site Contents** link first.



   B. From the **Site Contents** page, click the **Site Pages** link.



C. Click the ellipsis button to open the **Site Pages** library views menu.



Note

Alternatively, you can use the **Library** tab in the **Library Tools**. There is a **Manage Views** group on the **Library** tabs toolbar.

D. Click the **Created By Me** link from the library views menu. The **Site Pages** list will now display only pages that the account you are logged in with has created or modified.

Note

Since you have probably not yet created or modified any of the pages in the **Site Pages** library, the filtered view will be empty. Later in the course, you will be creating and modifying in the **Site Pages** library.

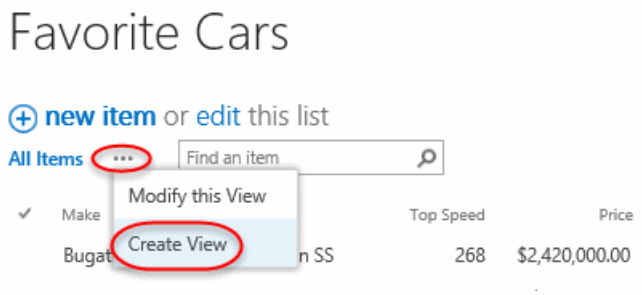
E. Take a few minutes to click each of the different views available in the **Site Pages** library.

Exercise 8: Creating Public and Personal Views

15 to 25 minutes

In this exercise, you will learn to create both Public and Personal views.

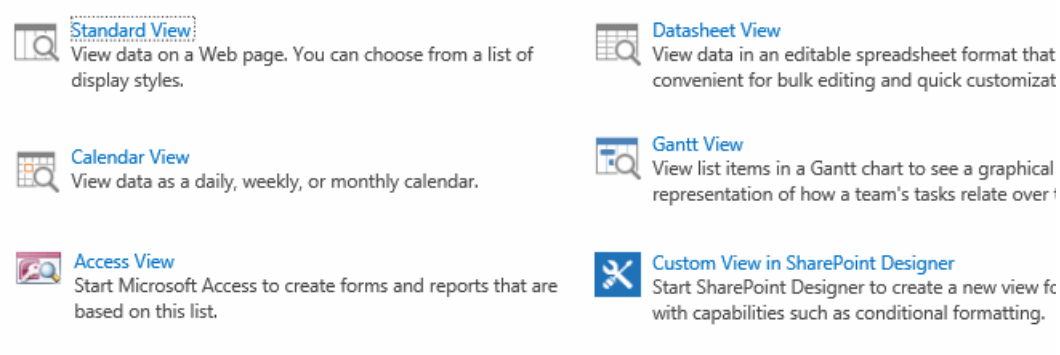
1. Create a new public view for the **Favorite Cars**.
   A. Click the **Favorite Cars** link in the **Quick Launch** menu.
   B. Click the ellipsis button next to the **All Items** link to open the **Favorite Cars** views menu.



Note

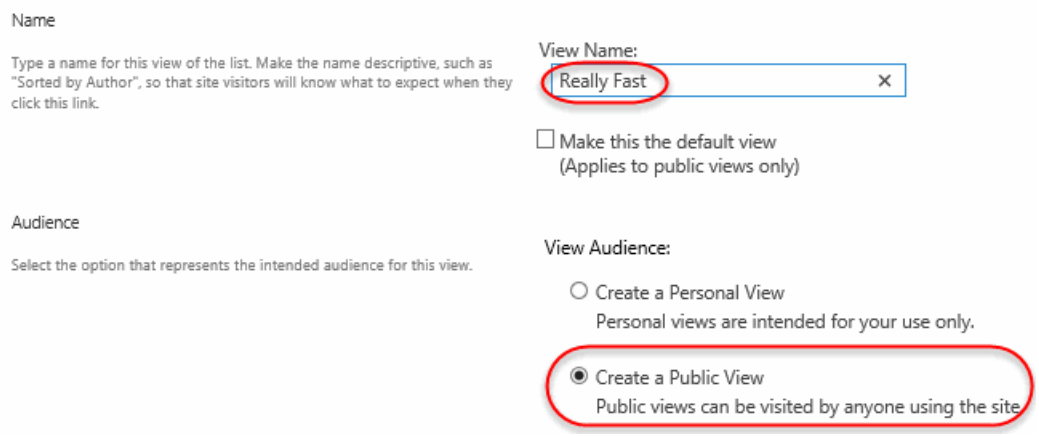
Alternatively, you can use the **List** tab toolbar. There is a **Manage Views** group on the **Favorite Cars** tabs toolbar.

   C. Click the **Create View** link.
   D. Take a moment to read through the view format options and their descriptions.



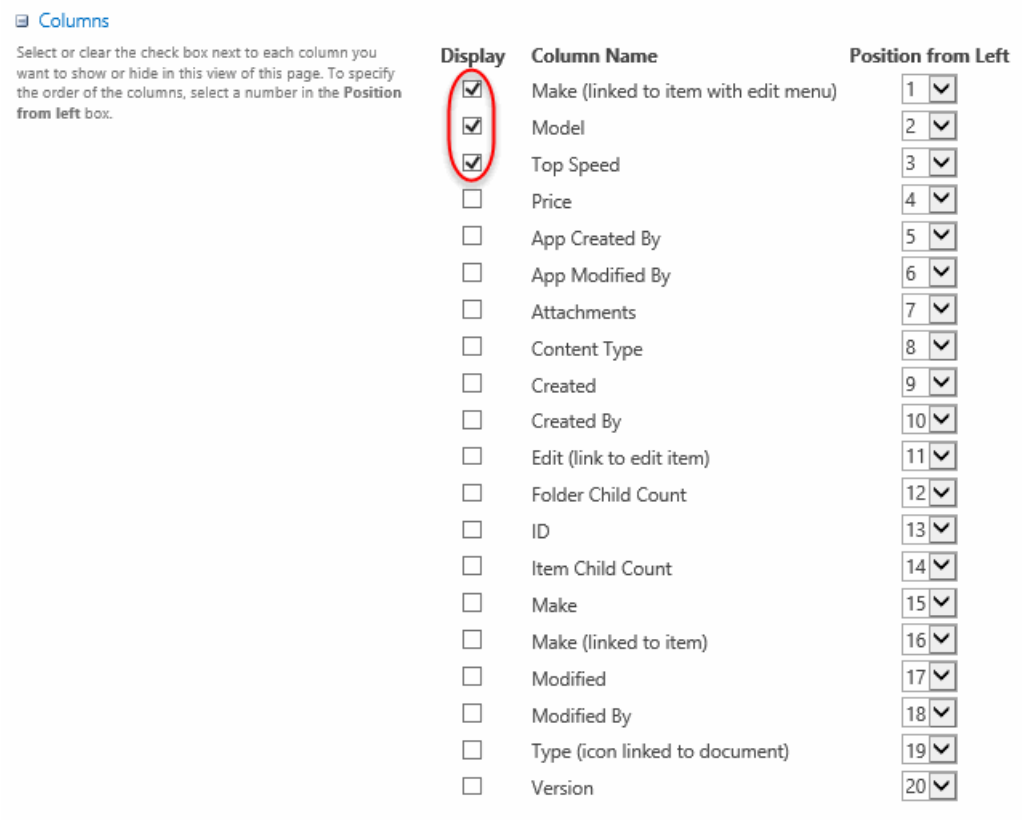
E. Click the **Standard View** format option link.

F. Enter "Really Fast" in the **View Name** field and leave the **View Audience** field set to **Create a Public View**.

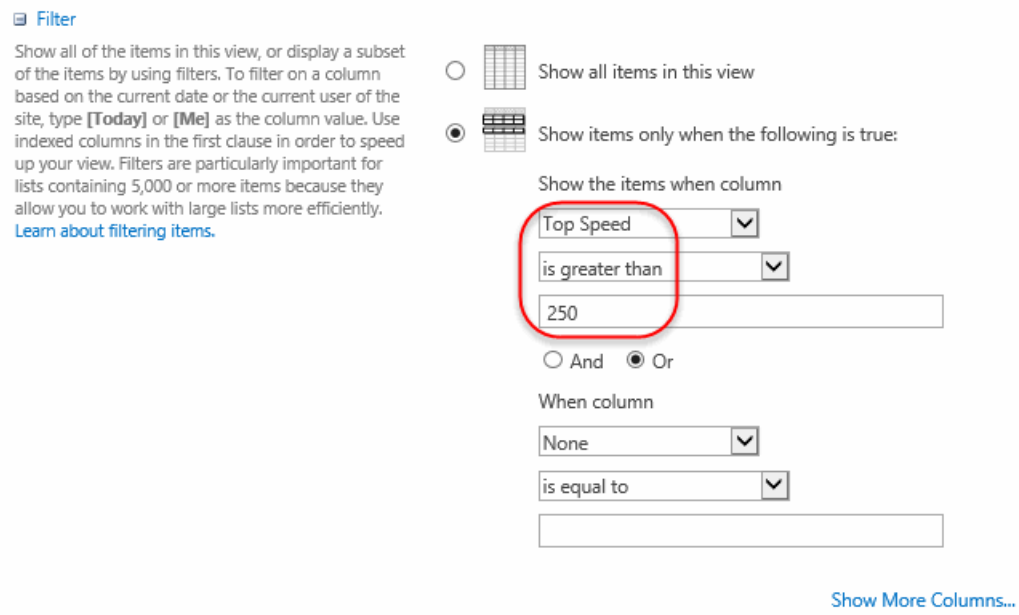


G. In the **Columns** section of the **Create View** form, select only the following columns:

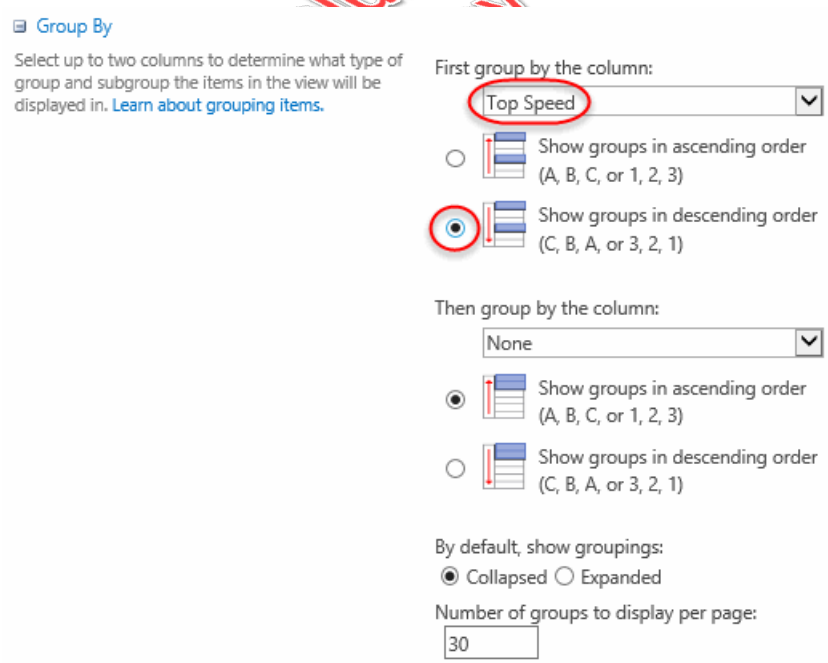
- **Make**
- **Model**
- **Top Speed**



H. In the **Filter** section, choose the **Top Speed** column in the **Column to Filter** drop-down list. Select **is greater than** in the **operator** drop-down field. Enter “250” in the **Value** field.



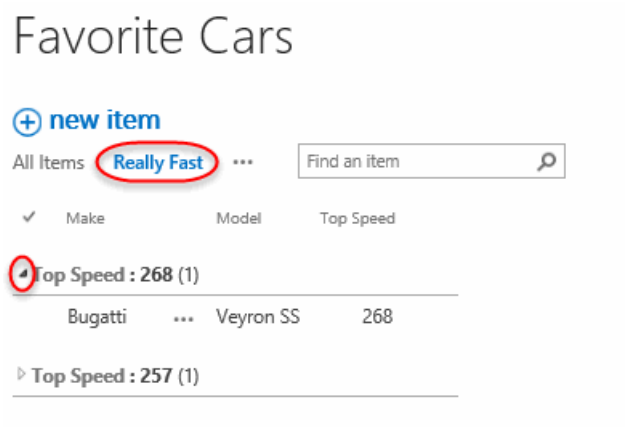
I. Expand the **Group By** section and then select **Top Speed** in the **First group by the column:** drop-down list field and choose the **Show groups in descending order** option.



J. Take a few moments to read through the rest of the **Create View** forms options. Leave them at their default values.

K. Click the **OK** button to save the new view and see the results.

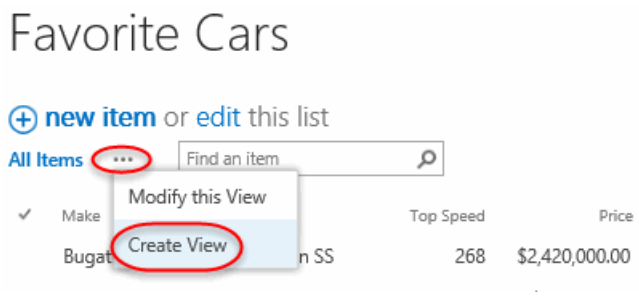
L. Note how the new view **Really Fast** is selected and shaded blue in the view choices. The list of course is also filtered to only show cars with top speeds faster than 250 and is grouped by **Top Speed**. The groups are expandable but because of the small sampling of cars there is only a single car in each group.



2. Create a new personal view for the **Favorite Cars**.

A. Click the **Favorite Cars** link in the **Quick Launch** menu.

B. Click the ellipsis button link to open the **Favorite Cars** views menu.



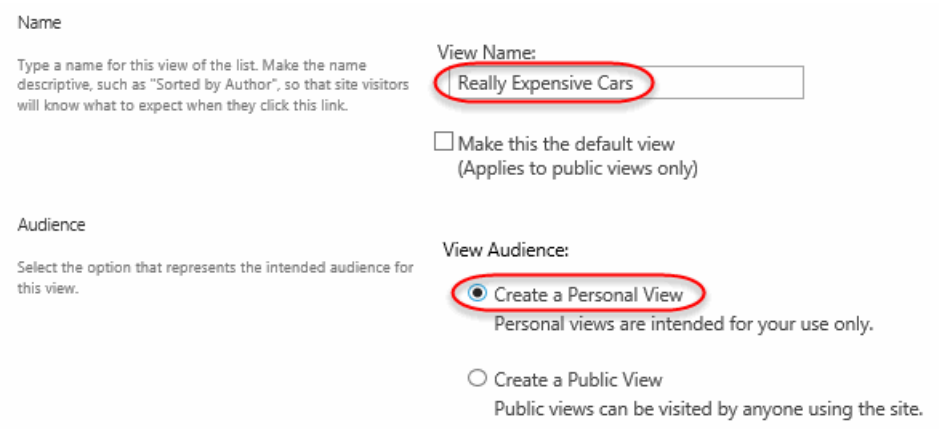
Note

Alternatively, you can use the **List** tab toolbar. There is a **Manage Views** group on the **Favorite Cars** tabs toolbar.

C. Click the **Create View** link.

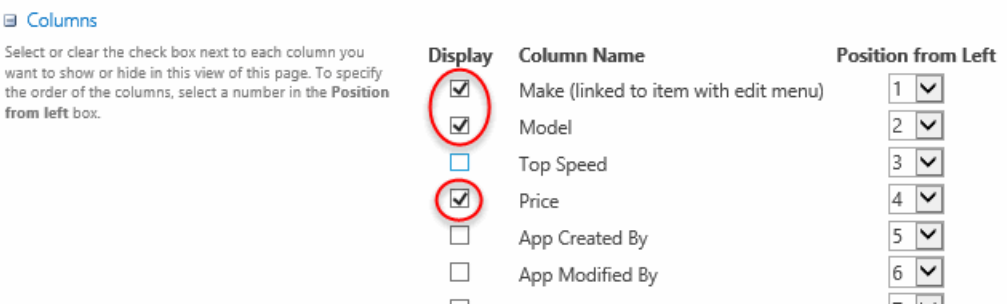
D. Click the **Standard View** format option link.

E. Enter “Really Expensive Cars” in the **View Name** field and change the **View Audience** field set to **Create a Personal View**.

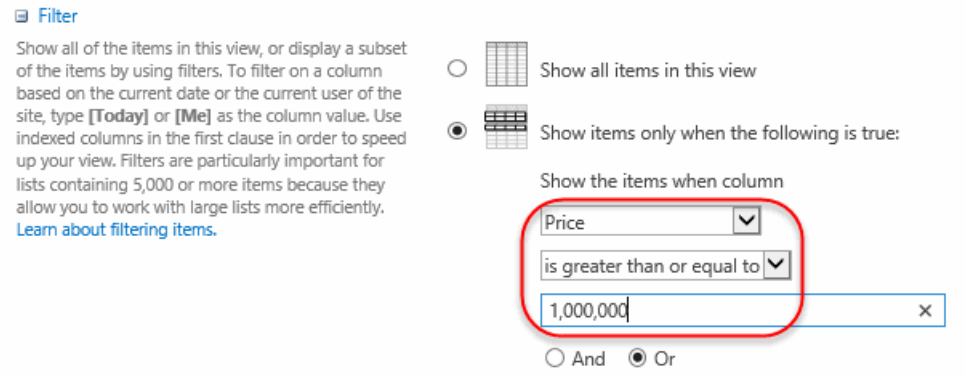


F. In the **Columns** section of the **Create View** form only select the following columns:

- **Make**
- **Model**
- **Price**

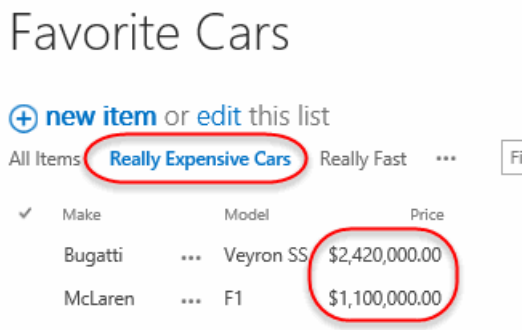


G. In the **Filter** section, choose the **Price** column in the **Column to Filter** drop-down list. Choose **is greater than or equal to** in the **operator** drop-down field. Enter “1,000,000” (one million) in the **Value** field.



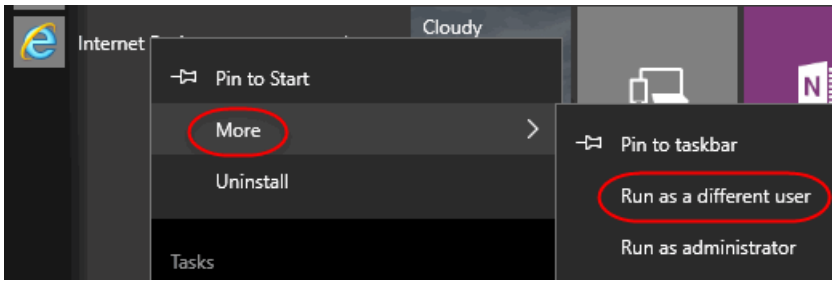
H. Click the **OK** button to save the new view and see the results.

I. Note how the new view **Really Expensive Cars** is selected and shaded blue in the view choices. The list is filtered to only show with prices greater than or equal to one million.



3. Log in with a different account to test the custom views created for the **Favorite Cars** list.

A. Right-click your Internet Explorer icon and choose **More** than choose the **Run as different user** option.



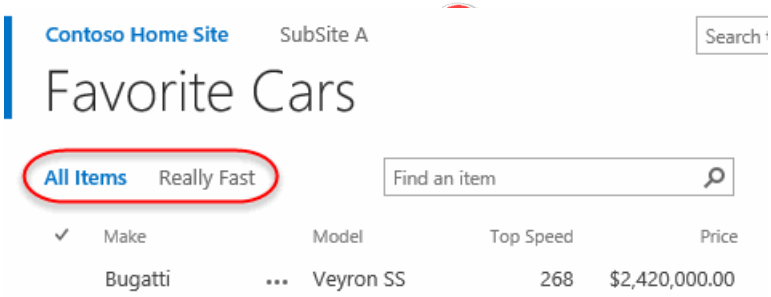
B. Enter **Wilbur** for the user name and **Pa$$w0rd** for the password.

C. In the new browser window running under the alternate user credentials navigate to your team site **http://spserver2016/sites/student**.

D. Note that now the **Open Menu** displays the name of the account you are currently logged into the site with.

E. Make sure you are viewing the **Favorite Cars** list. If you are not, click the **Favorite Cars** link in the **Quick Launch** menu.

F. Note how the only view available to this account is the public view **Really Fast**. The view **Really Expensive Cars** was created as a personal view under your original account and is only available to that account. Depending on your alternate account's permissions, you may also note that the views menu is security trimmed.



G. Close the browser window running under the alternate credentials.

Conclusion

In this lesson, you have learned:

- How to use default views built into lists and libraries.
- How to create personal views.
- How to create shared views.
- How to configure views.
- How to set the default view for a list or library.

LESSON 5
Working with Sites

Topics Covered

☑ What are Site Templates?

☑ “Out-of-the-box” Site Templates.

☑ Creating a new site using Site Templates.

☑ Creating a Project site.

☑ Creating a Team site.

☑ Creating a Community site.

☑ Creating a Blog site.

☑ Managing the sites listed in the **Top Link Bar**.

Introduction

All SharePoint content is accessed through a site. A SharePoint site is the container for lists and libraries and provides a starting point for basic administration. The content, lists, libraries, and basic look and feel of a site is initially determined by the Site Template used to create the site.

5.1. Site Templates

The version of SharePoint determines the initial list of site templates available to create new sites. The following is a list of child site templates available from a Team Site created in an Enterprise installation of SharePoint 2016.

- Team Site
- Blog
- Project Site

- Community Site
- Document Center
- Records Center
- Business Intelligence Center
- Enterprise Search Center
- Basic Search Center
- Visio Process Repository

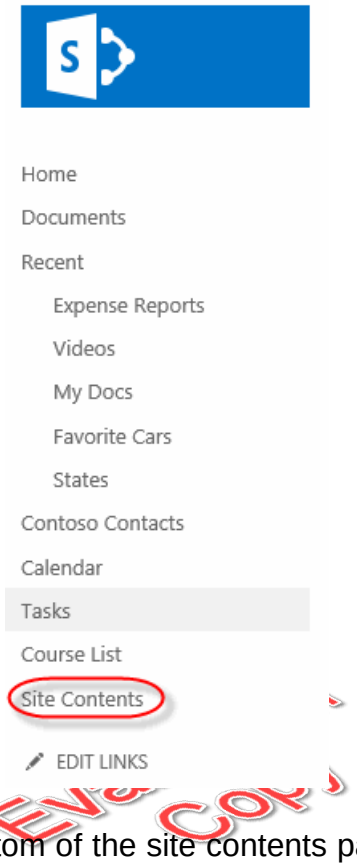
Additional Site Templates can be made available in any installation of SharePoint by creating custom templates or enabling Farm, Site, and Site Collection features.

5.2. Creating Sites

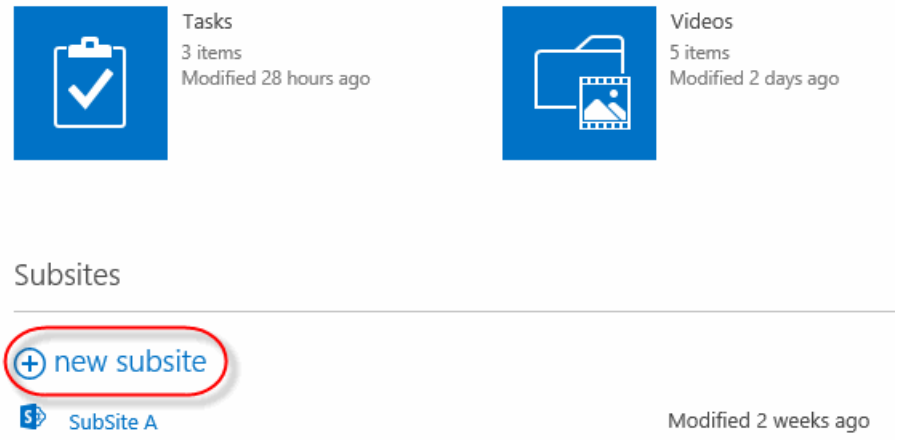
❖ 5.2.1. Creating a Team Site

In this walk-through you will learn to create new child sites using the **Team Site** template.

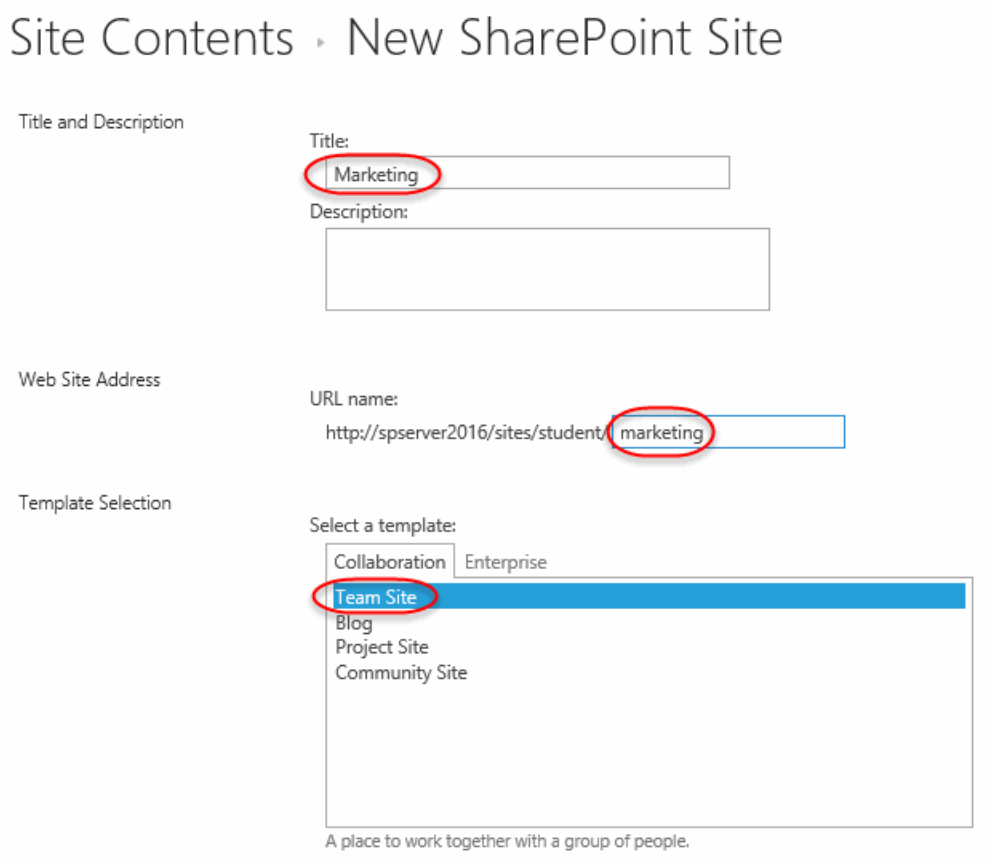
1. Create a new child site named “Marketing” using the **Team Site** template.
    A. Click the **Site Contents** link in the **Quick Launch** menu.



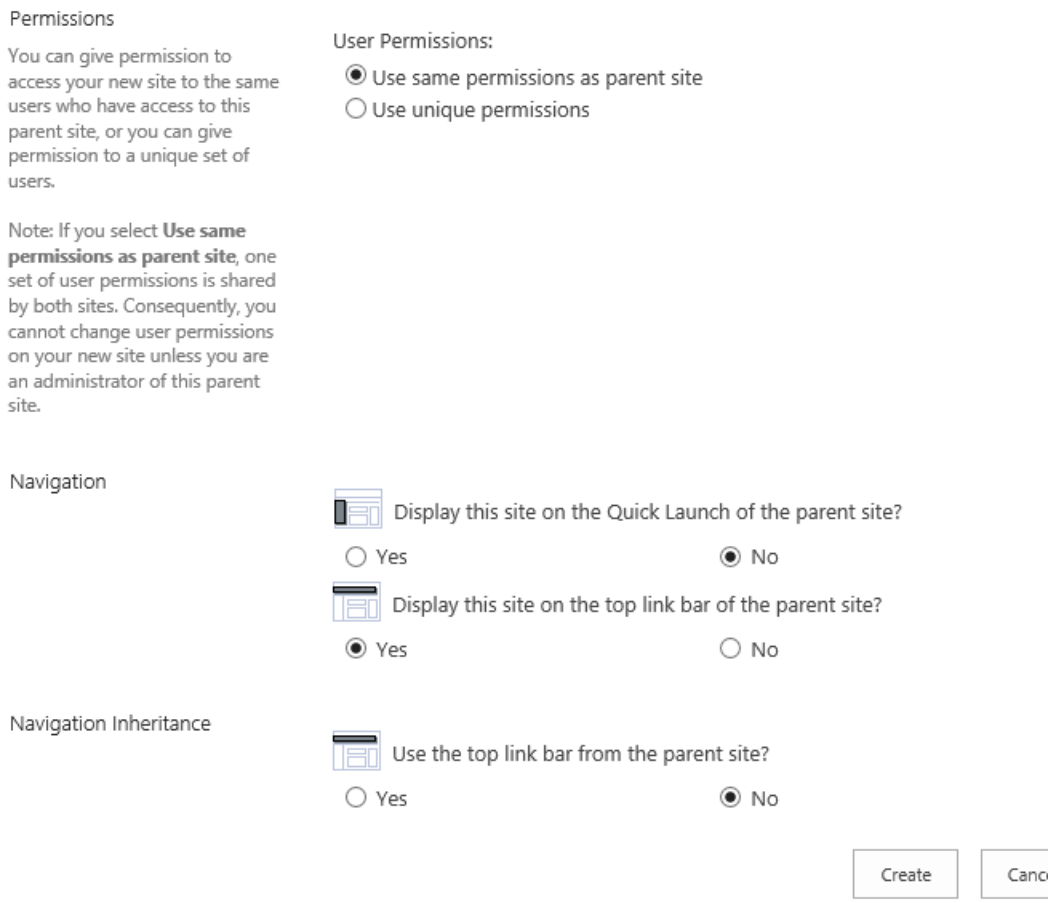
B. Scroll to the bottom of the site contents page and click the **new subsite** link.



C. Type “Marketing” in the **Title** field and “marketing” in the **URL name** field. Ensure that the **Team Site** template is selected in the **Select a template:** option.



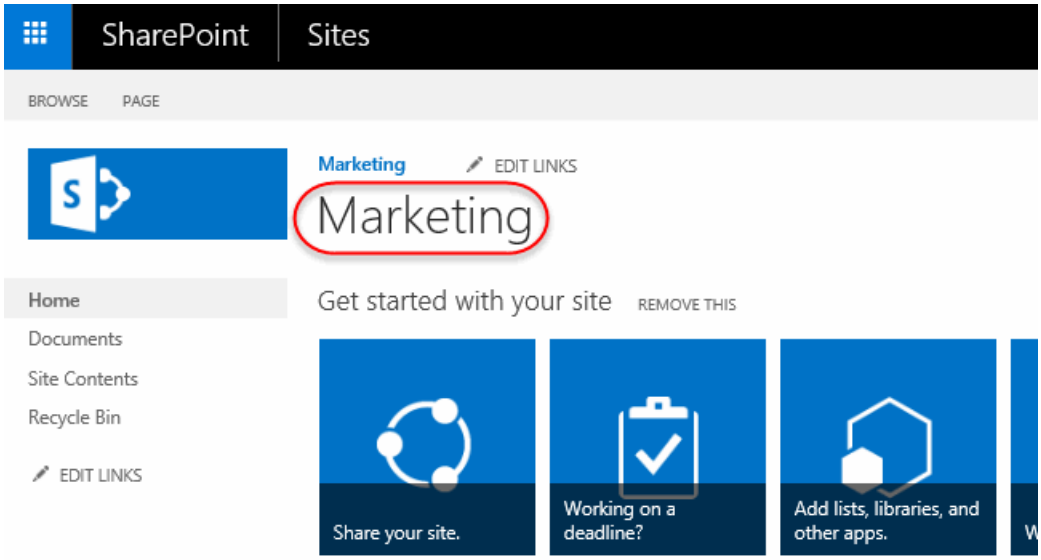
D. Scroll down and note the options available for permissions and navigation. Leave the options at their default settings and click the **Create** button to complete the process.



Looking Forward

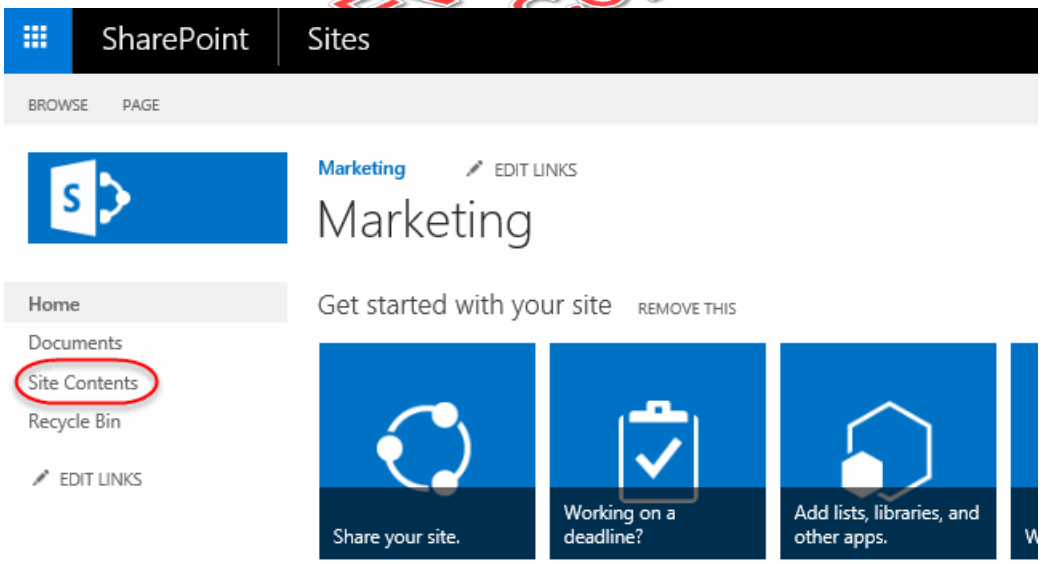
In a later walk-through in this lesson, you will learn how to change the navigation settings of the **Marketing** site. In a later part of this course, you will change the permissions.

E. You will automatically be navigated to the **Home** page of the new **Marketing** site. If you have not done much customization to the parent site it's hard to tell that this is a different site.

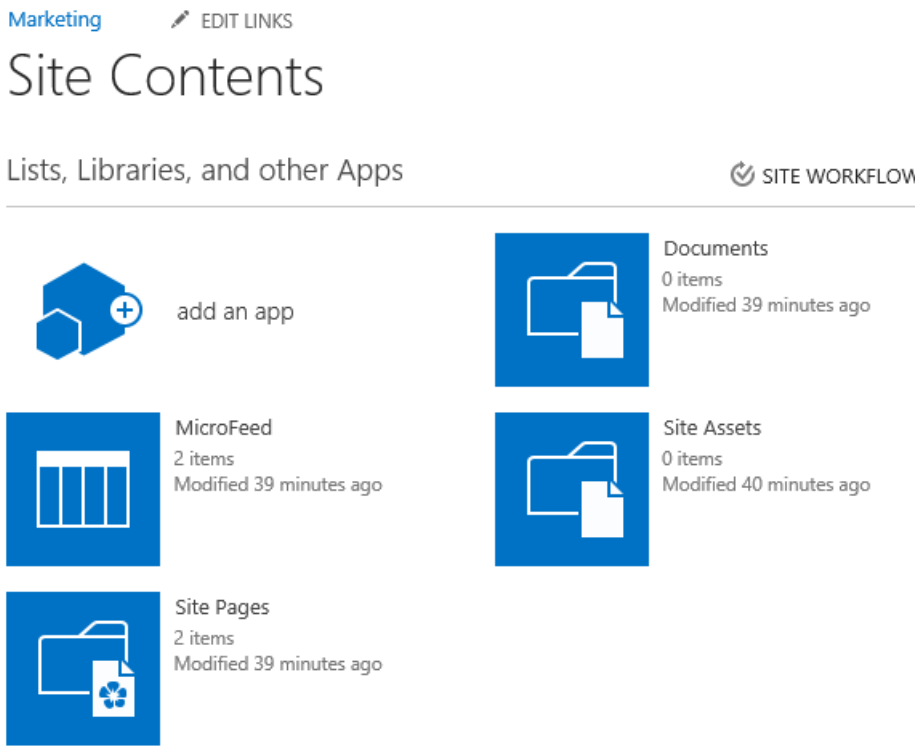


2. View the lists and libraries that come with the **Team Site** template.

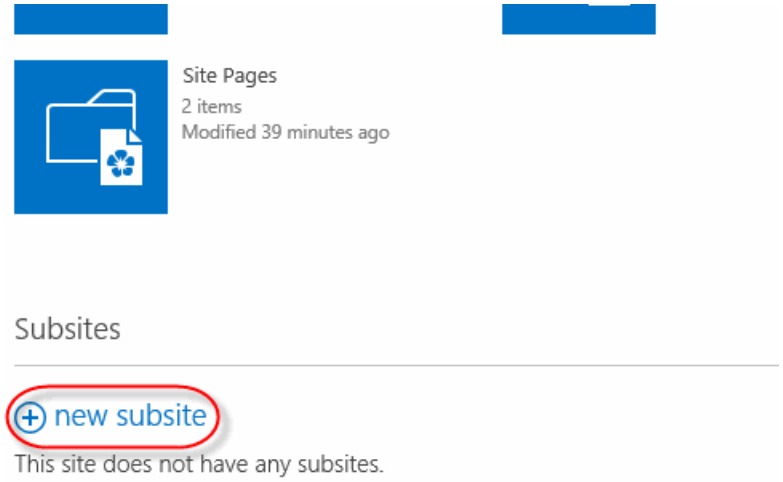
   A. In the **Marketing** site, click the **Site Contents** link in the **Quick Launch** menu.



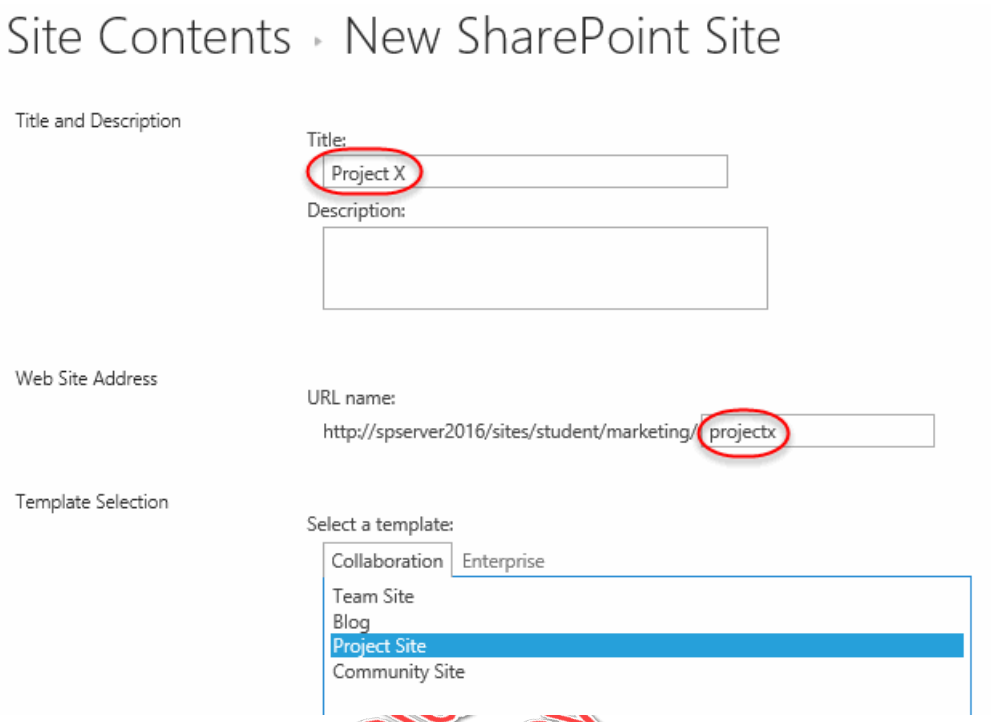
   B. Take a few moments to look through the Lists and Libraries created by default from the **Team Site** template.



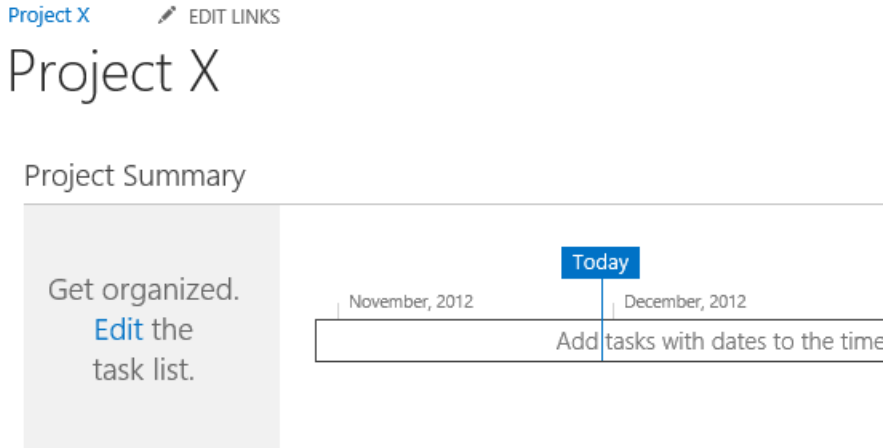
3. Create a new child site to **Marketing** using the **Project Site** template.
   A. Click the **new subsite** link at the bottom of the **Site Contents** page of the **Marketing** site.



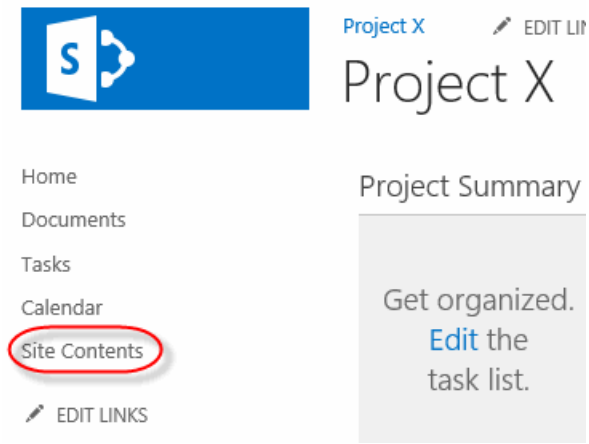
   B. Select the **Project Site** template in the **New SharePoint Site** form and type “Project X” in the **Title** field and “projectx” in the **URL name** field. Click the **Create** button to complete the process.



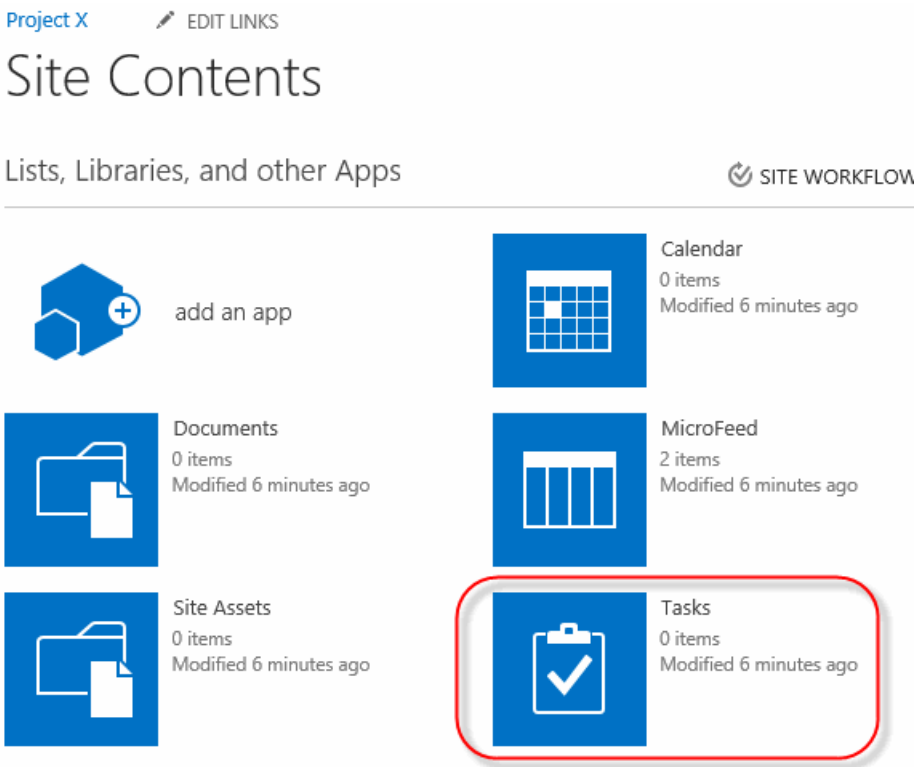
4. Explore what comes with the **Project Site** template.
   A. Note that the **Project Site** site home page has a **Project Summary** view.



   B. Click the **Site Contents** link in the **Project X** **Quick Launch** menu.



C. Notice the addition of the **Tasks** list that was created by default as compared to the **Team Site** template used earlier.



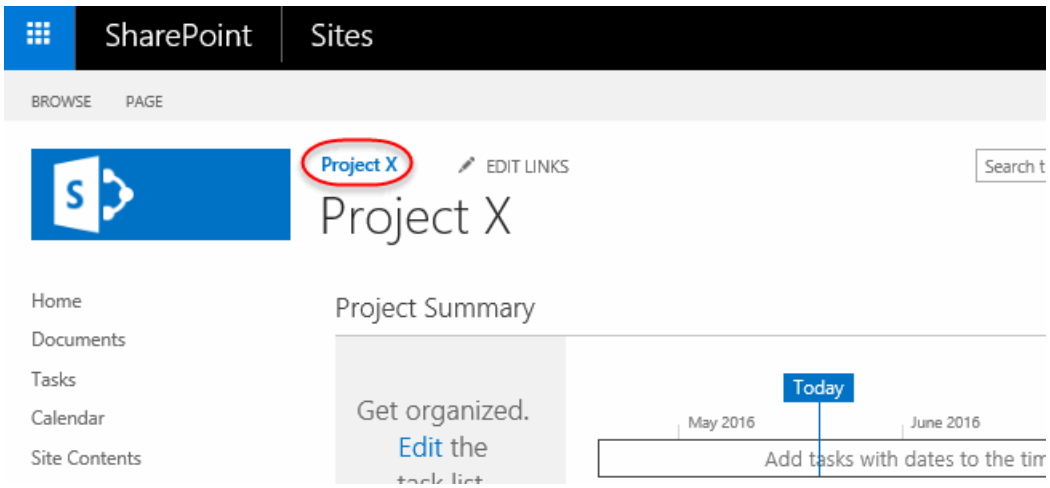
5.3. Site Navigation

❖ 5.3.1. Managing Site Navigation

This walk-through will explore current navigation settings between parent and child sites. The walk-through will then modify the child sites to share navigation links with their parent.

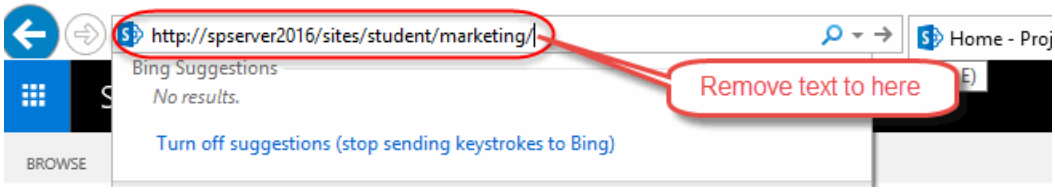
1. Verify that both the **Project X** and the **Marketing** sites have separate **Top Link Bars** and **Quick Launches**.

   A. Verify that you are currently in the **Project X** home page by clicking the **Project X** link in the **Top Link Bar**.

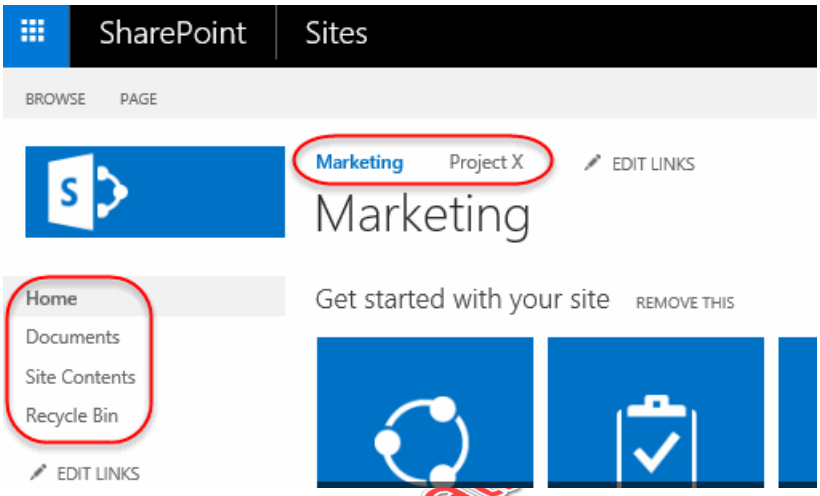


   B. Note that there are no additional links in the **Top Link Bar** of the **Project X** site.

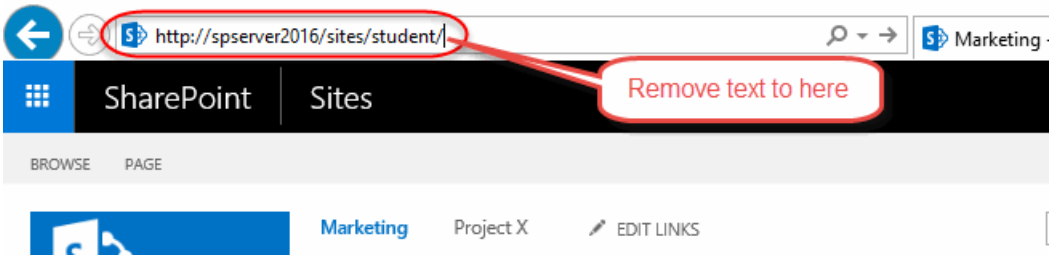
   C. There is currently no obvious way to navigate back to the parent site **Marketing** from the child site **Project X**. To navigate back to **Marketing**, remove the text in browser's address field back to "Marketing" as shown in the screen capture.



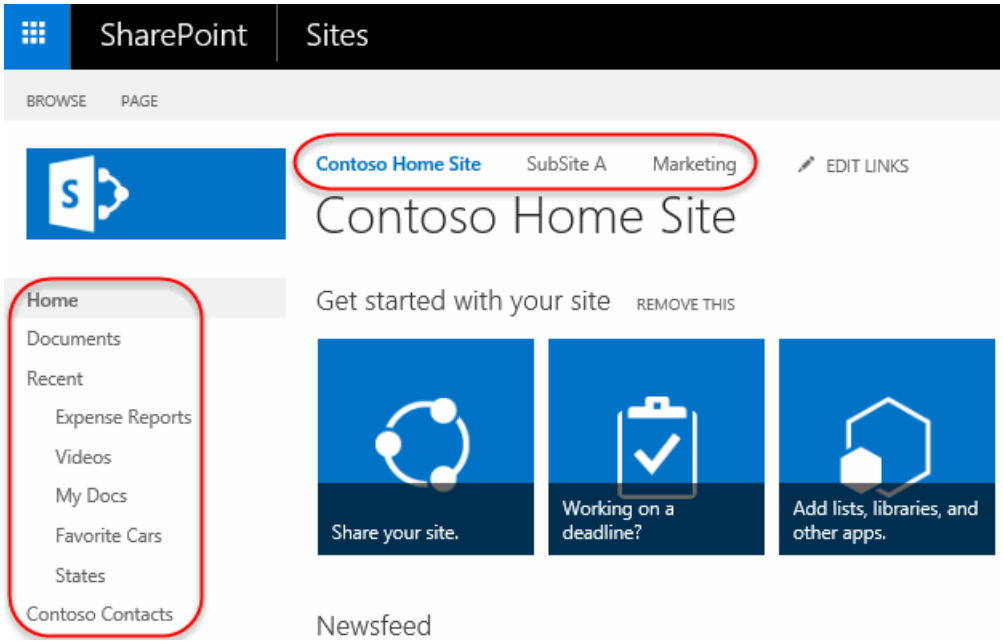
D. Note that now the **Top Link Bar** has a **Marketing** link as well as a **Project X** link. Also note that the **Quick Launch Menu** lists only content from this site.



E. Just as before, there is yet no obvious way to navigate to the parent site of **Marketing**. To navigate back to **Contoso Home Site**, the root site, remove the text in browser's address field back to **before** "Marketing" as shown in the screen capture.



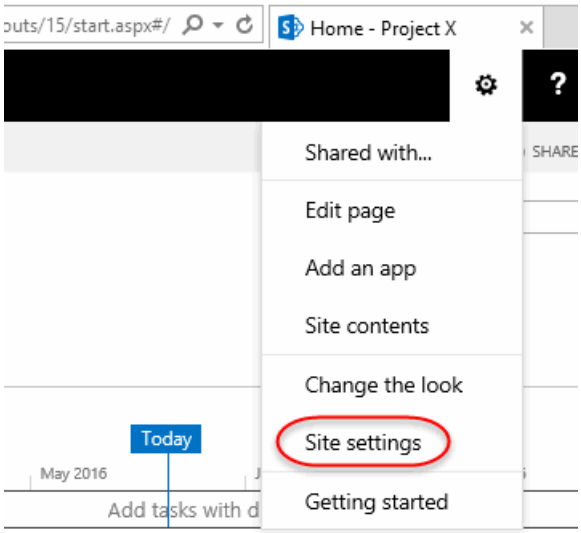
F. Note that the root parent site currently has the three links in the **Top Link Bar** as shown in the image. The **Contoso Home Site** link in this site's **Top Link Bar** links to the Home page for this site. Additionally, the **Quick Launch Menu** only has links for content within this site.



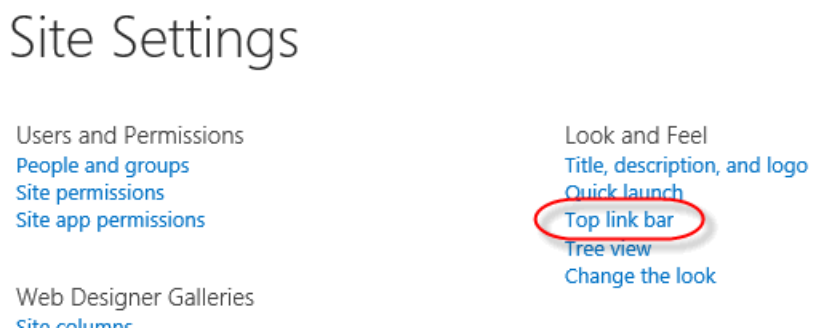
2. Configure the **Project X** site to share the **Top Link Bar** of its parent site **Marketing**.

   A. Navigate to the **Project X** site by first clicking the **Marketing** link in the **Top Link Bar** of the root parent site and then clicking the **Project X** link in the **Top Link Bar** of the **Marketing** site.

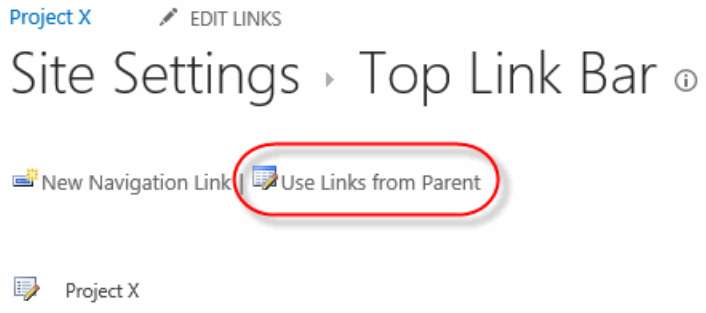
   B. Within the **Project X** site, click the **Settings** button and select the **Site Settings** link from the menu.



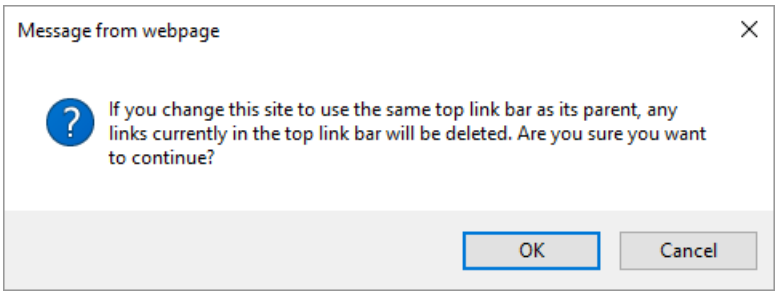
C. Click the **Top link bar** link under the **Look and Feel** group on the **Site Settings** page.



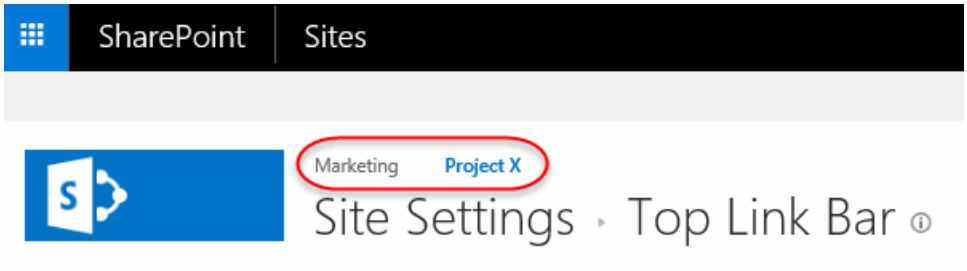
D. Click the **Use Links from Parent** link on the **Top Link Bar** settings page.



E. Click the **OK** button on the **Message from web page** dialog window warning us that our current **Top Link Bar** links will be deleted.



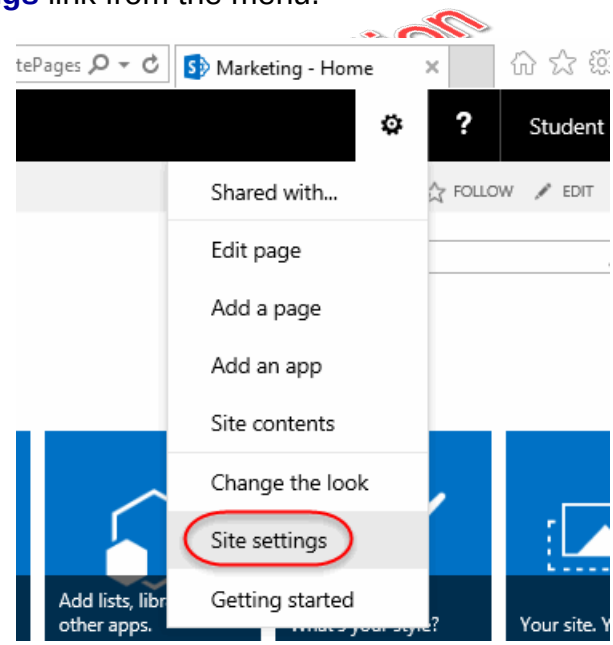
F. Verify that now the **Project X** site has the same **Top Link Bar** as the parent **Marketing** site.



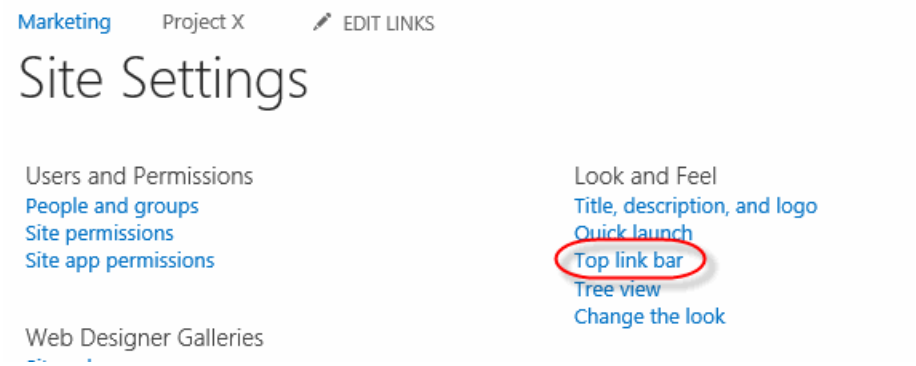
G. Click the **Marketing** link in the **Top Link Bar** and verify that it takes us to the Home page of the **Marketing** site.

3. Configure the **Marketing** site to share the **Top Link Bar** of its parent site, **Contoso Home Site** .

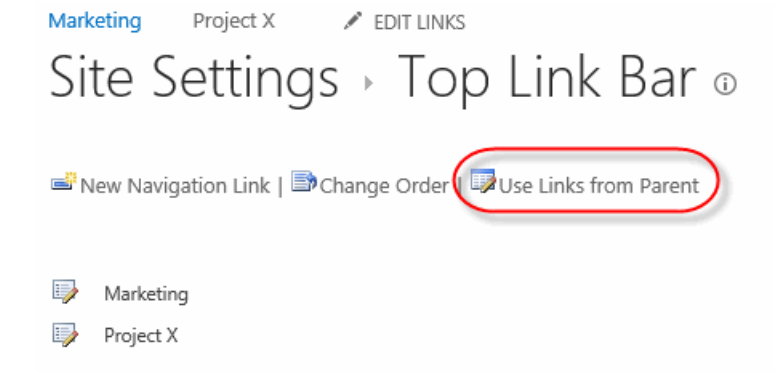
   A. Within the **Marketing** site, click the **Settings** button and select the **Site Settings** link from the menu.



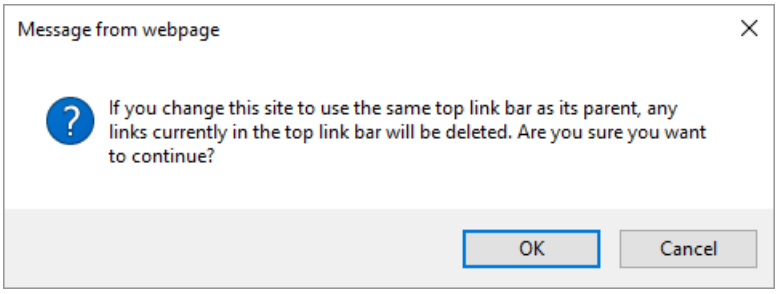
   B. Click the **Top link bar** link under the **Look and Feel** group on the **Site Settings** page.



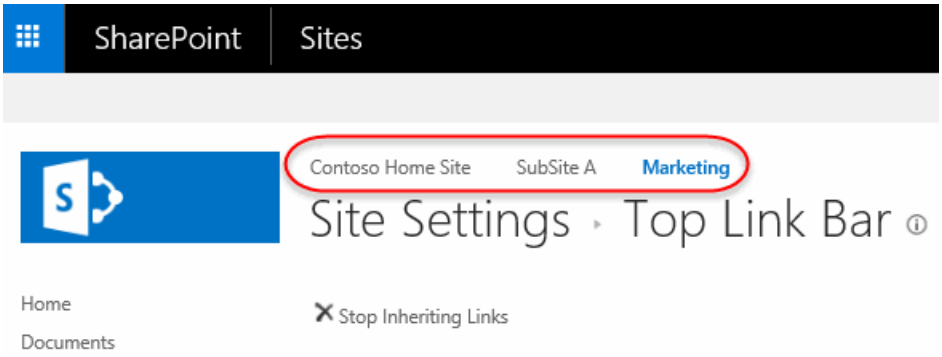
C. Click the **Use Links from Parent** link on the **Top Link Bar** settings page.



D. Click the **OK** button on the **Message from web page** dialog window warning us that our current **Top Link Bar** links will be deleted.



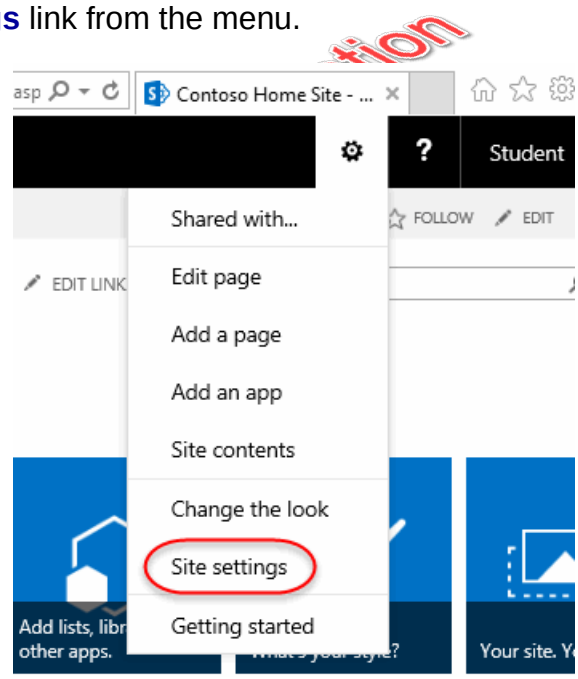
E. Verify that now the **Marketing** site has the same **Top Link Bar** of the parent, but you have lost the link to **Project X**. You can fix that by modifying the **Top Link Bar** of the root parent site.



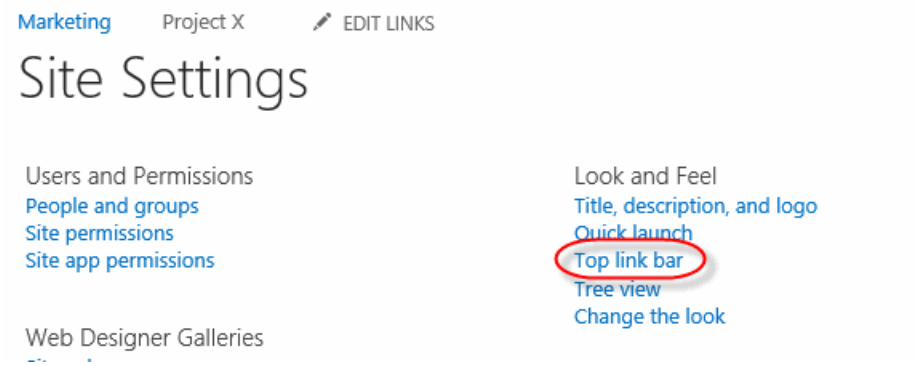
F. Click the **Contoso Home Site** link in the **Top Link Bar** and verify that it takes you to the Home page of the root parent site.

4. Add a new link to the **Top Link Bar** of the root parent site.

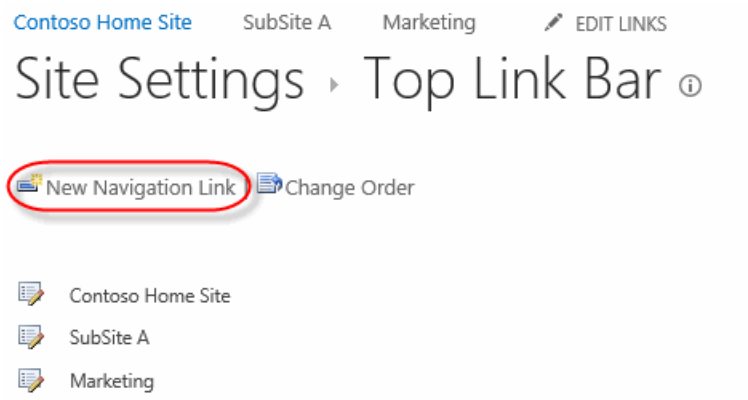
A. While in the root parent site, click the **Settings** button and select the **Site Settings** link from the menu.



B. Click the **Top link bar** link under the **Look and Feel** group on the **Site Settings** page.

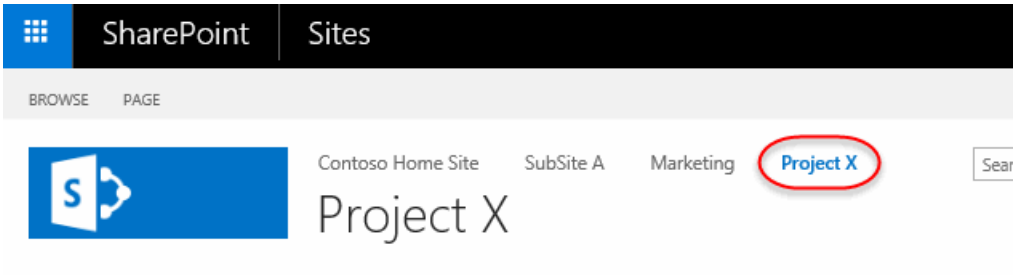


C. Click the **New Navigation Link** link on the **Top Link Bar** settings page.



D. On the **Edit Navigation Link** page enter "http://spserver2016/sites/student/marketing/projectx" in the **Type the Web address** field. In the **Type the description** field, enter "Project X". Click the **OK** button to save your changes.

E. Verify that the new **Project X** link in the **Top Link Bar** works by clicking it. The link should take you to the Home page of the **Project X** site.

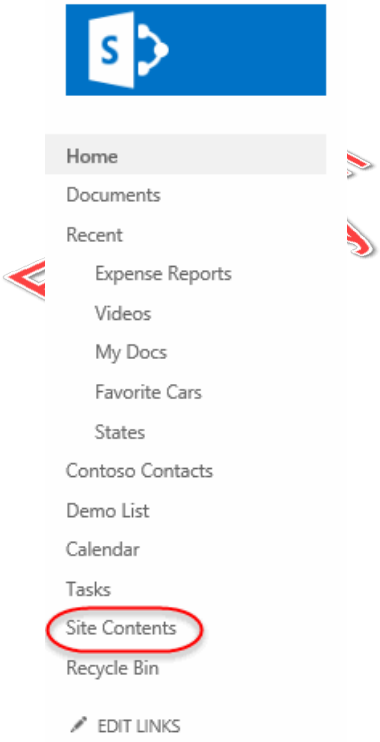


Exercise 9: Creating Team Sites

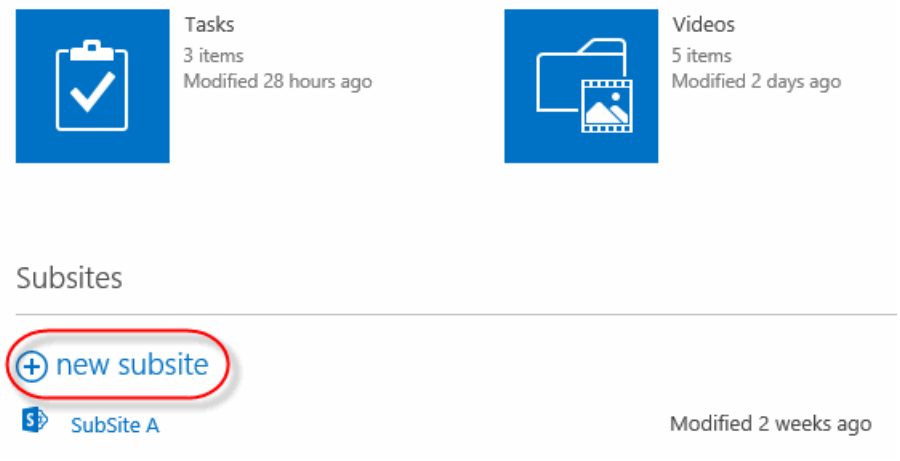
10 to 15 minutes

In this exercise, you will create a new site based on the **Team Site** template. In addition, you will test and modify the navigation options from parent site to child site.

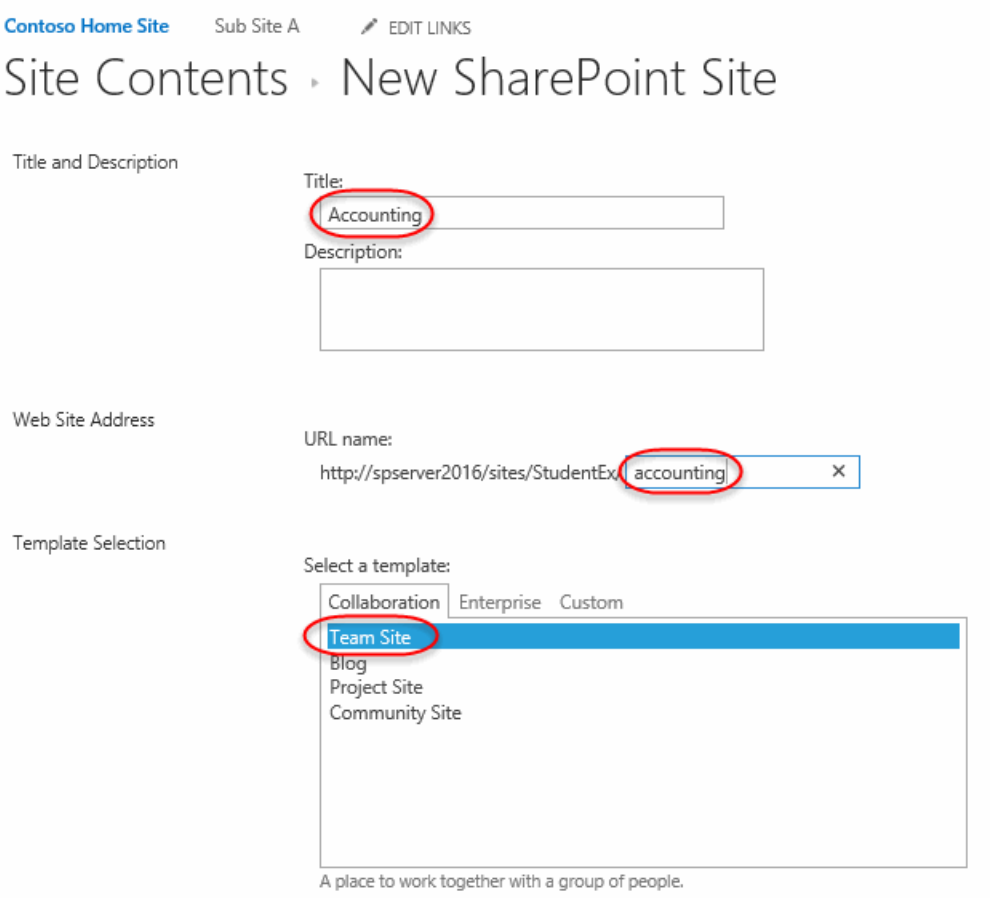
1. Create a new child site using the **Team Site** template.
   A. Click the **Site Contents** link in the **Quick Launch** menu.



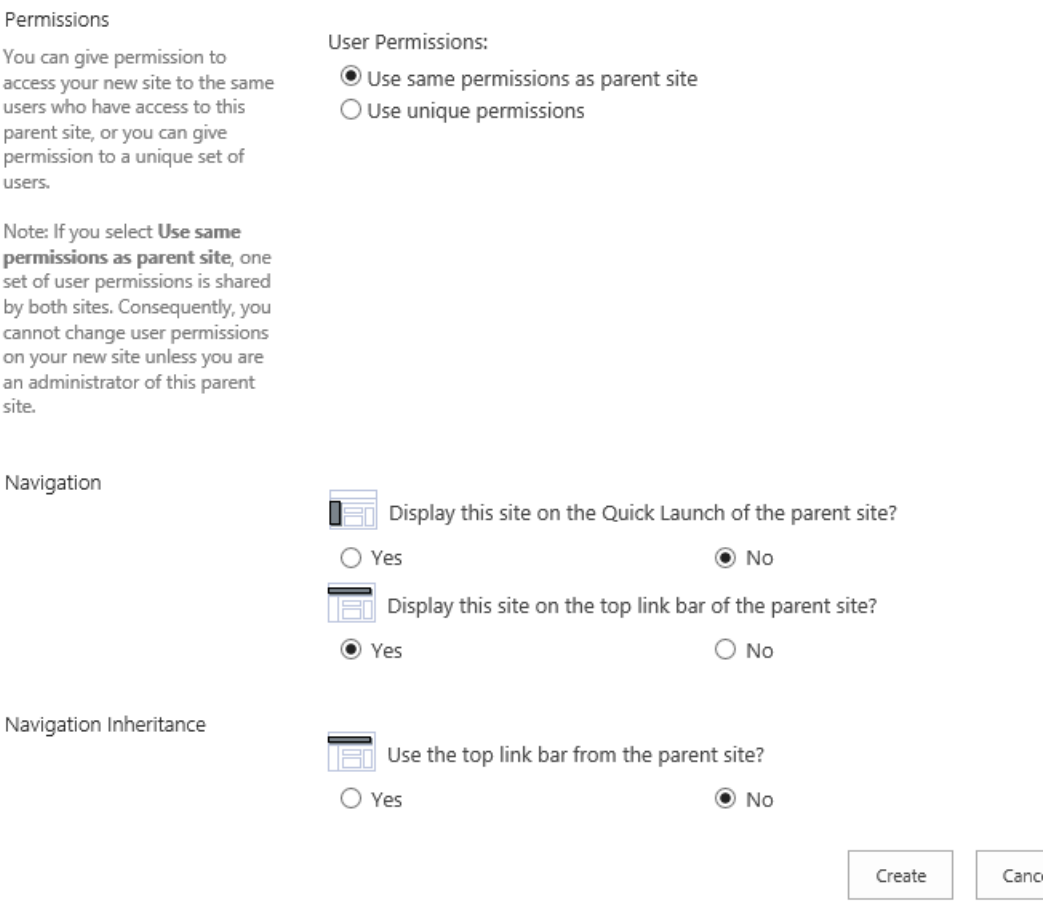
   B. Scroll to the bottom of the site contents page and click the **new subsite** link.



C. Type “Accounting” in the **Title** field and “accounting” in the **URL name** field. Ensure that the **Team Site** template is selected in the **Select a template:** option.



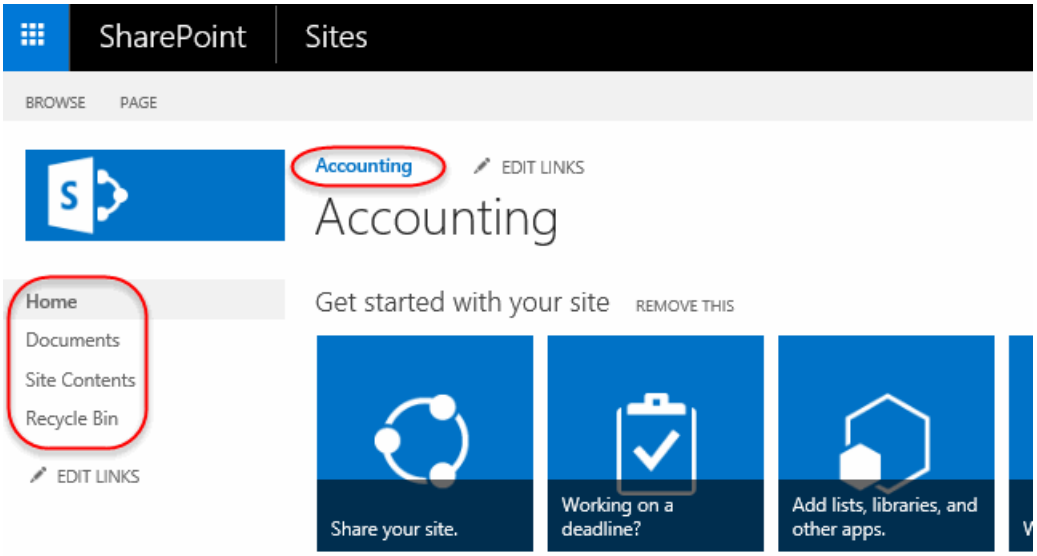
D. Scroll down and note the options available for permissions and navigation. Leave the options at their default settings and click the **Create** button to complete the process.



Looking Forward

In a later walk-through in this lesson, you will learn how to change the navigation settings of the **Accounting** site. In a later part of this course, you will change the permissions.

E. You will automatically be navigated to the **Home** page of the new **Accounting** site. If you have not done much customization to the parent site it's hard to tell that this is a different site. Note how this site has its own **Top Navigation** bar as well as its own **Quick Launch** menu.

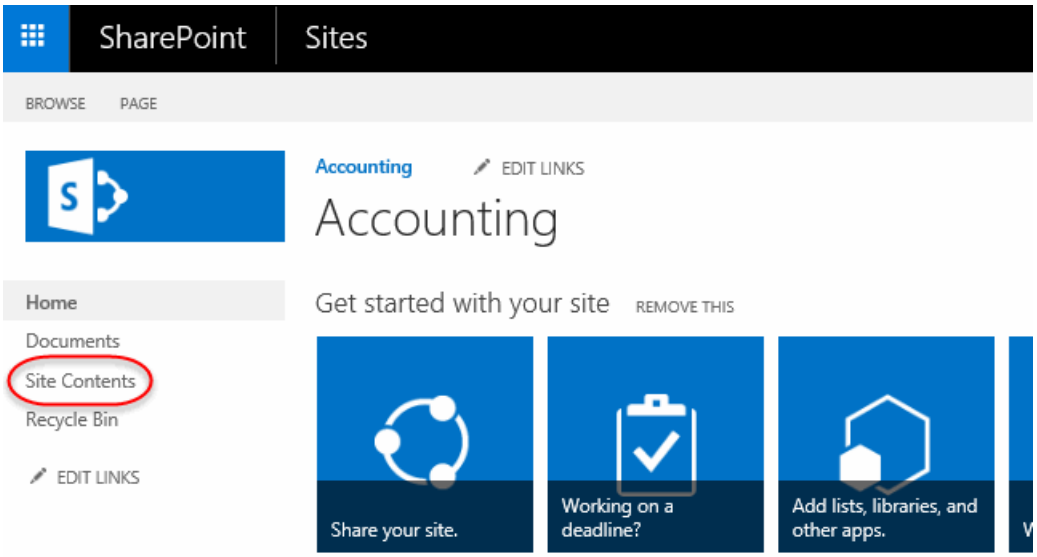


Note

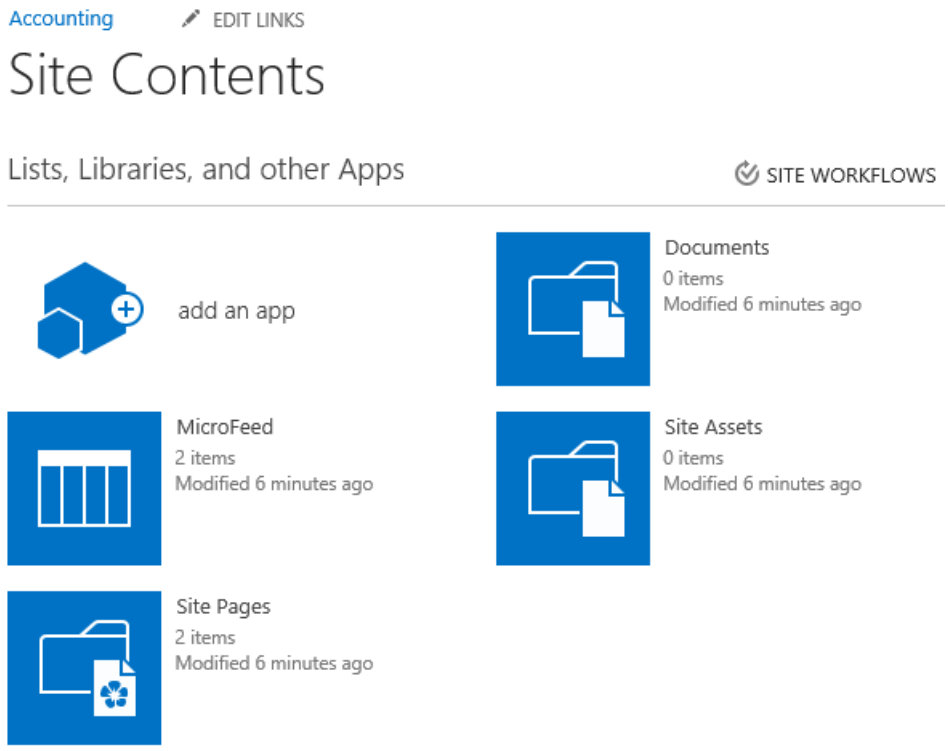
Based on the options left at their default values, this child Team Site does not share any of the links from the parent site.

2. Explore the content of the new child **Accounting** Team Site.

   A. In the **Accounting** site, click the **Site Contents** link in the **Quick Launch** menu.

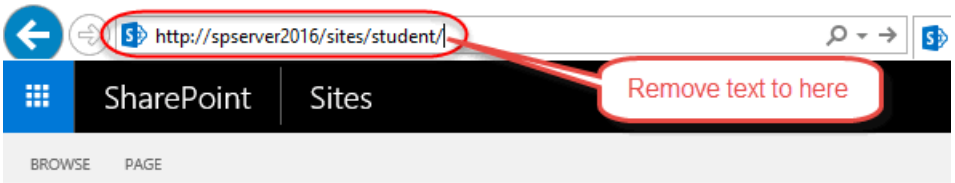


B. Take a few moments to look through the Lists and Libraries created by default from the **Team Site** template.

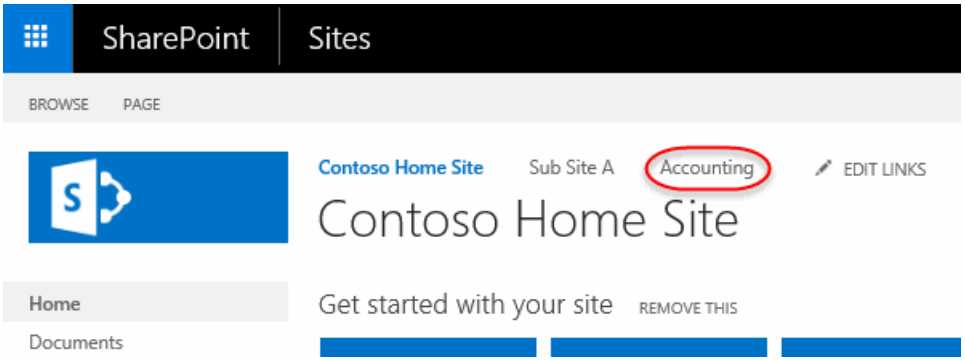


3. Navigate back to the root parent site.

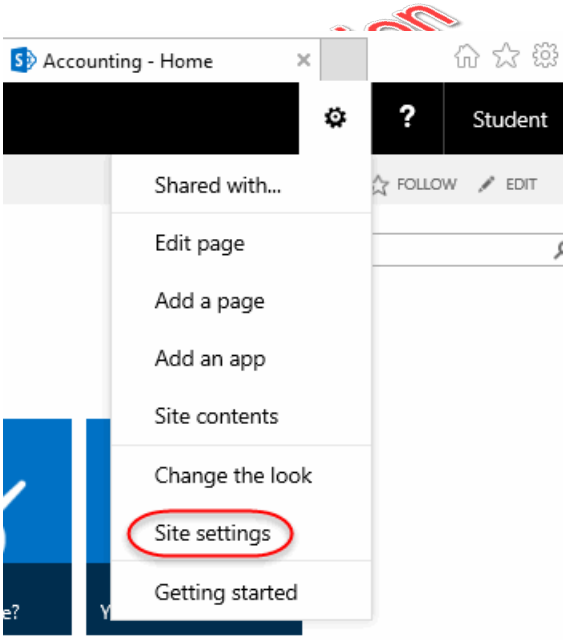
   A. There is currently no obvious way to navigate back to the parent site **Contoso Home Site** from the child site **Accounting**. To navigate back to **Accounting** remove the text in browser's address field back to **before** "Accounting" as shown in the screen capture.



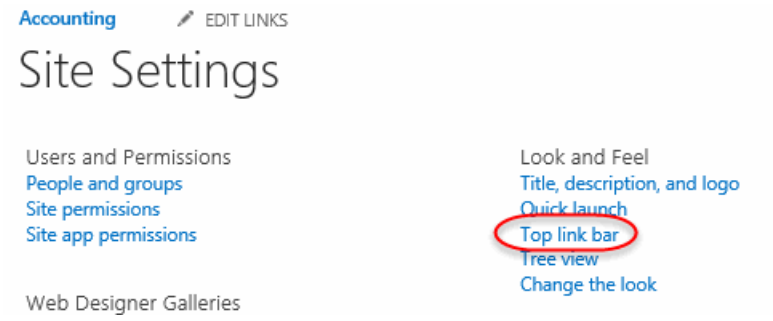
   B. Note that the new **Accounting** site has a link on the parent site's **Top Navigation** bar.



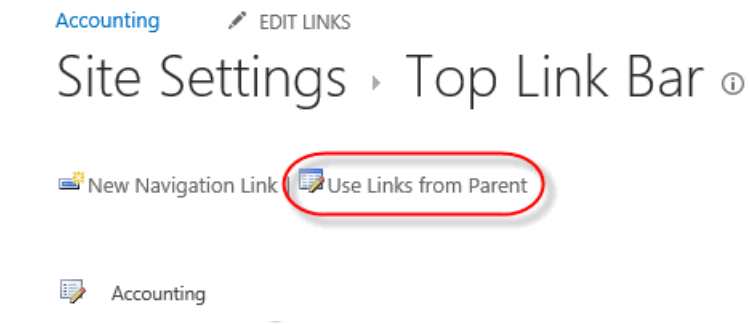
4. Modify the **Accounting** site to use the same **Top Link Bar** as the parent site.
   A. Click the **Accounting** link in the **Top Navigation** bar.
   B. Within the **Accounting** site, click the **Settings** button and select the **Site Settings** link from the menu.



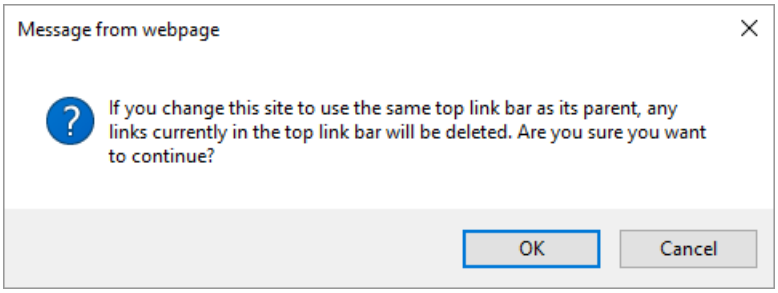
   C. Click the **Top link bar** link under the **Look and Feel** group on the **Site Settings** page.



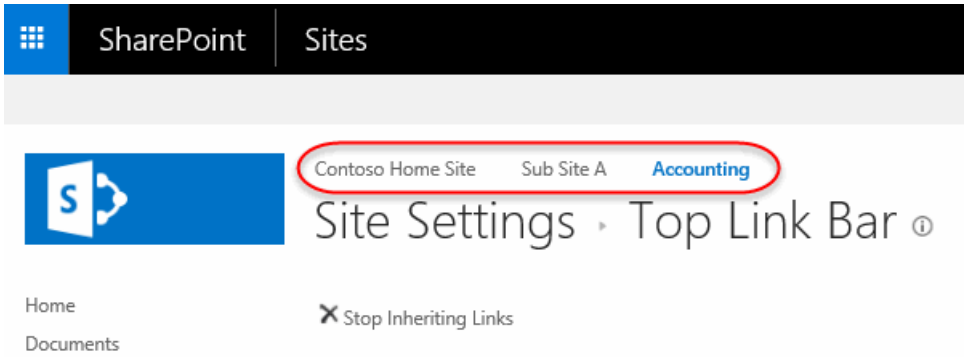
D. Click the **Use Links from Parent** link on the **Top Link Bar** settings page.



E. Click the **OK** button on the **Message from web page** dialog window warning us that our current **Top Link Bar** links will be deleted.



F. Note how the **Accounting** site now has the same **Top Link Bar** as the parent site. This makes it easier to navigate back to the parent site as well as sibling sites.

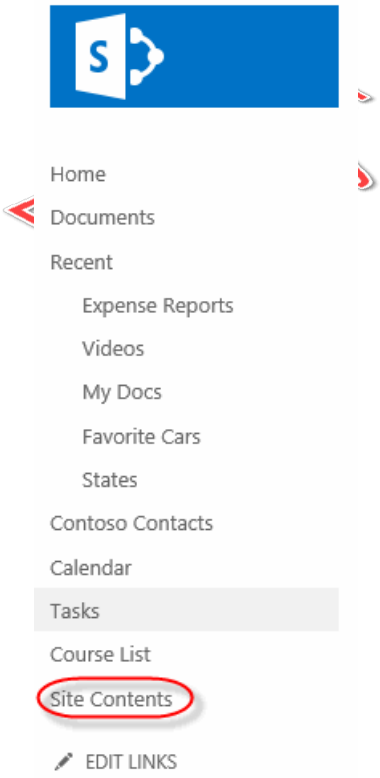

SharePoint
Sites
Contoso Home Site
Sub Site A
Accounting
Site Settings
Top Link Bar
Home
Documents
Stop Inheriting Links

Exercise 10: Creating a Meeting Workspace

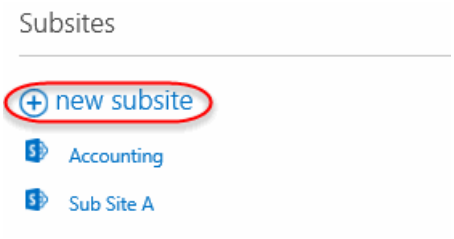
10 to 15 minutes

In this exercise, you will create a new child site to the root **Contoso Home Site** site based on the **Community Site** template.

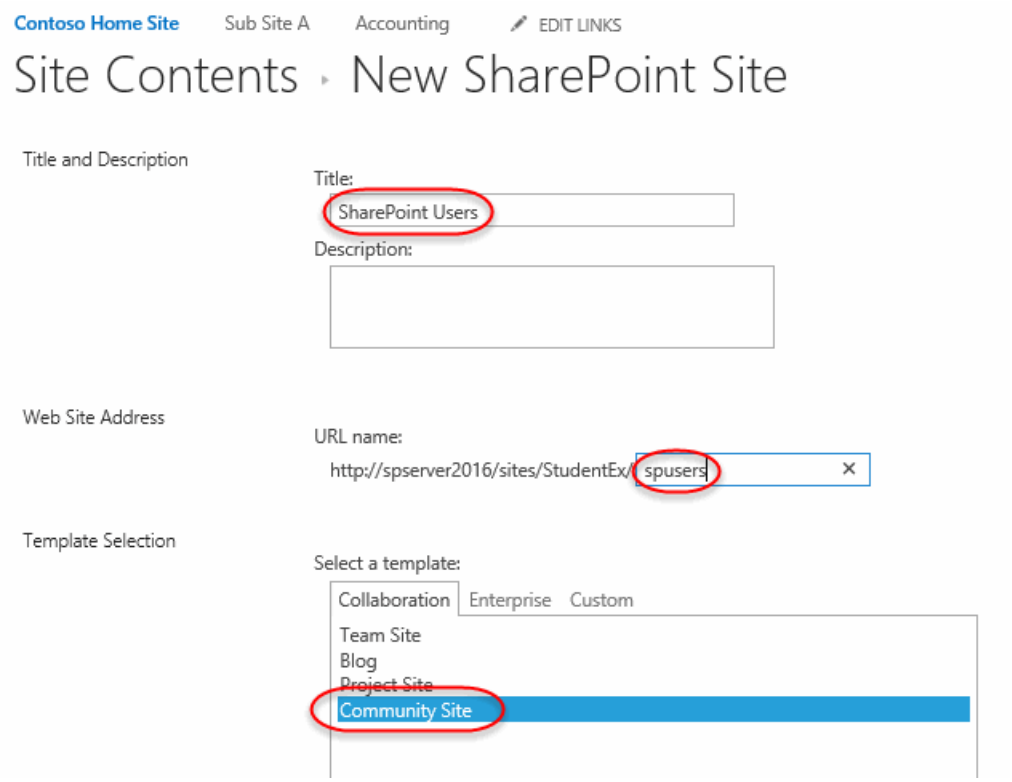
1. Create a new subsite to the root site from the **Community Site** template.
   A. Make sure you are starting from the root site **Contoso Home Site**, click the link in the **Top Navigation** bar if you are not.
   B. Click the **Site Contents** link in the **Quick Launch** menu.



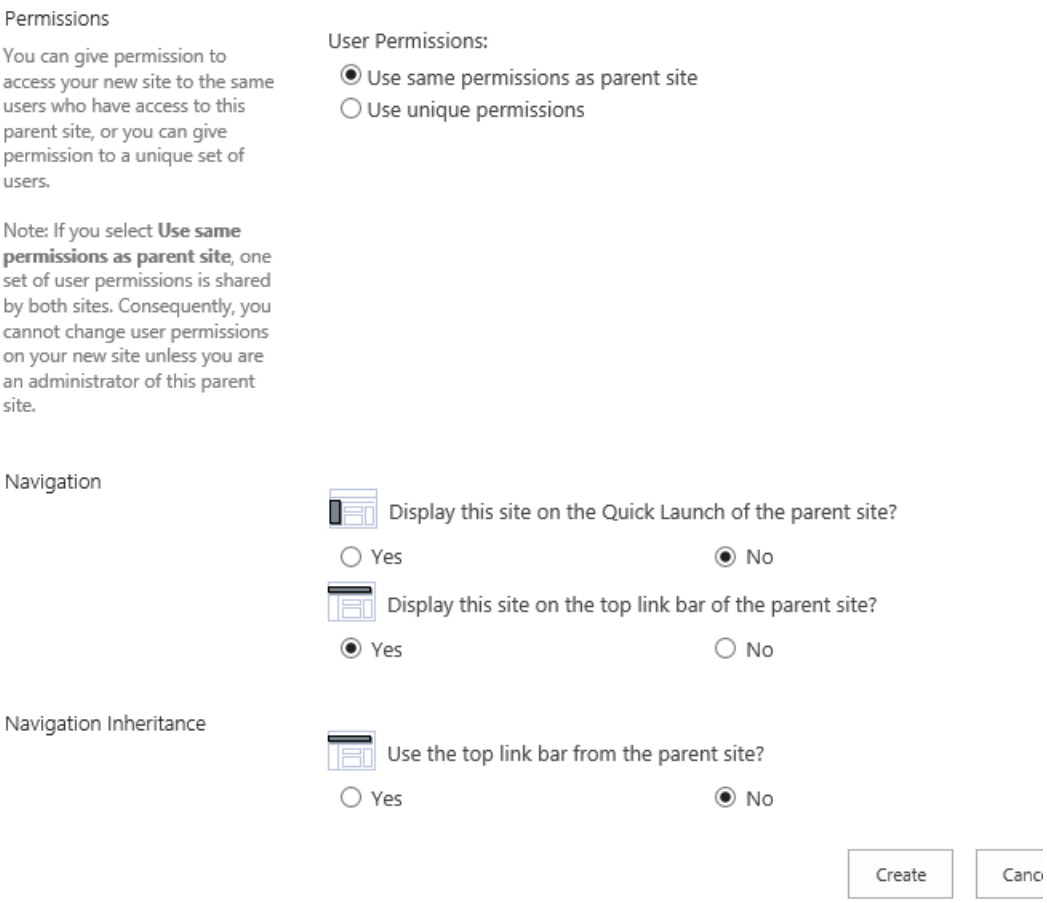
   C. Scroll to the bottom of the site contents page and click the **new subsite** link.



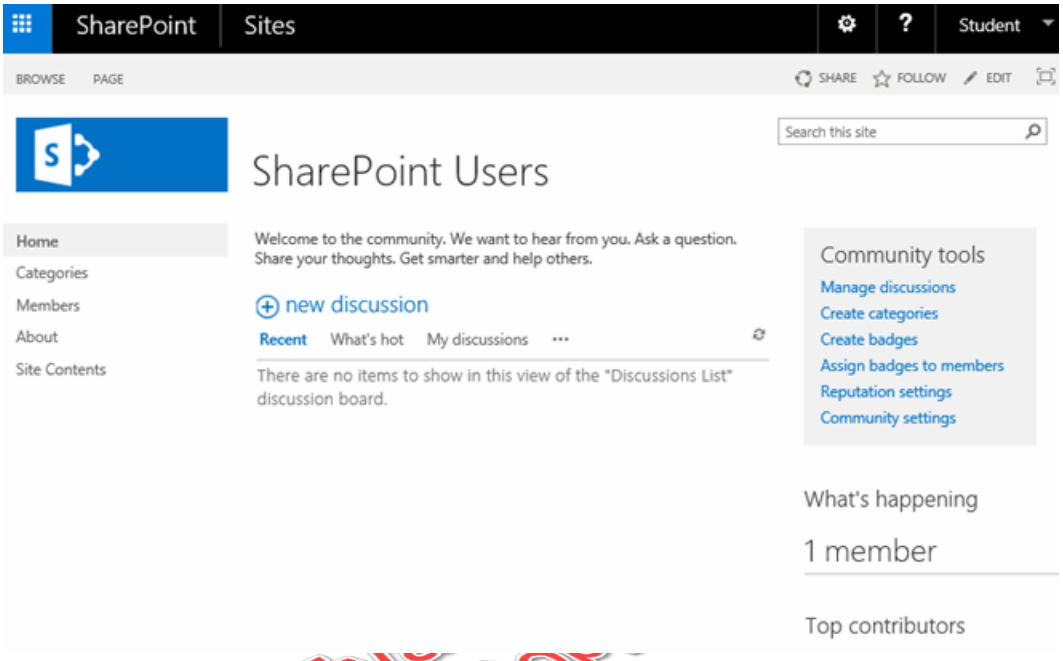
D. Type “SharePoint Users” in the **Title** field and “spusers” in the **URL name** field. Ensure that the **Community Site** template is selected in the **Select a template:** option.



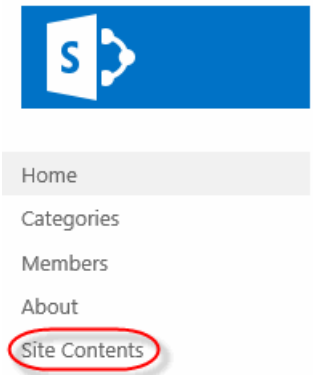
E. Scroll down and note the options available for permissions and navigation. Leave the options at their default settings and click the **Create** button to complete the process.



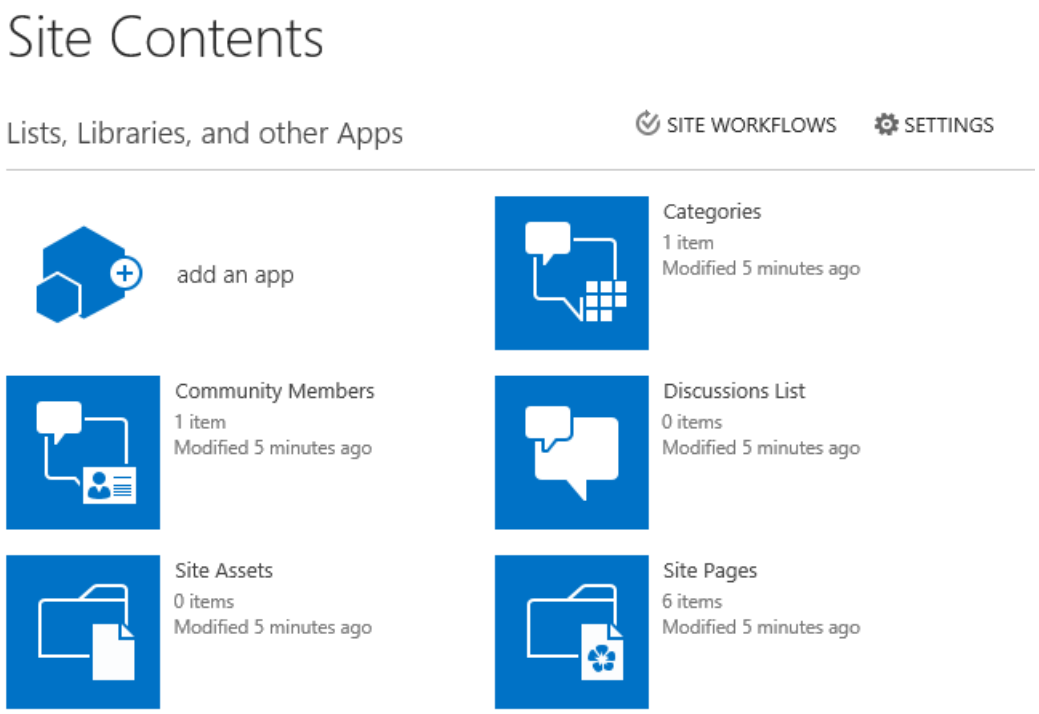
2. Explore the **Community Site**.
   A. Take a few moments to read the headings and text within the **Home** page of the **SharePoint Users** community site.



B. Click the **Site Contents** link in the **Quick Launch** menu.



C. Note that the default content for a **Community Site** includes **Categories, Community Members** and a **Discussion List**.



D. Change the URL path of your browser to navigate back to the parent root site.

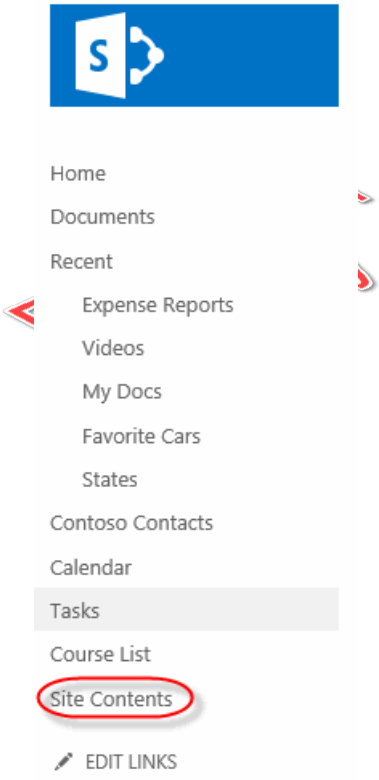
Note
Optionally you can modify the **SharePoint Users** site to inherit the **Top Link Bar** of the parent root site as described in the previous exercise.

Exercise 11: Creating a Blog Site

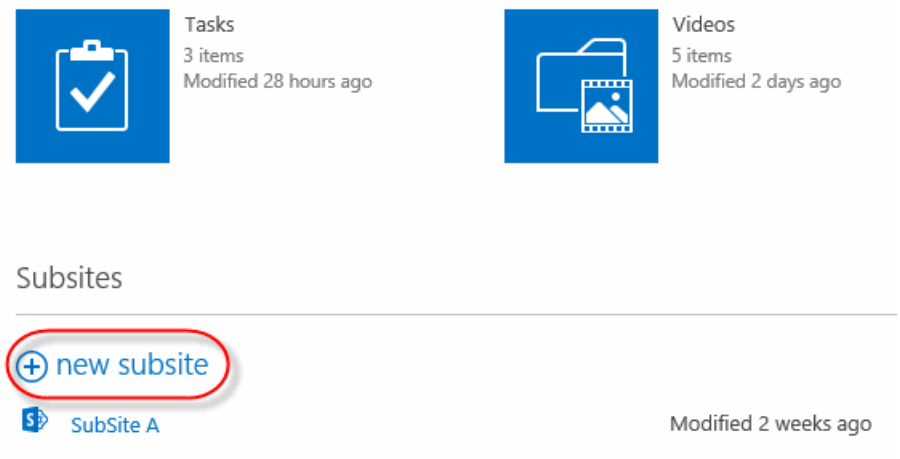
15 to 25 minutes

In this exercise, you will create a new site based on the **Blog** template.

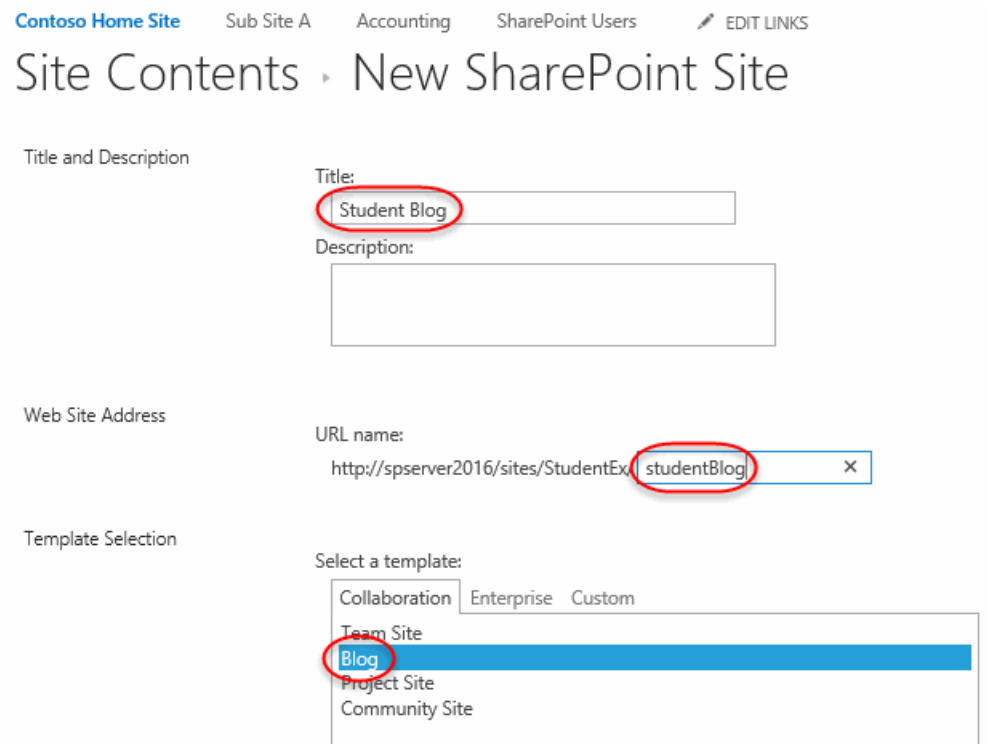
1. Create a new Blog site as a child site to root parent site.
   A. Click the **Site Contents** link in the **Quick Launch** menu.



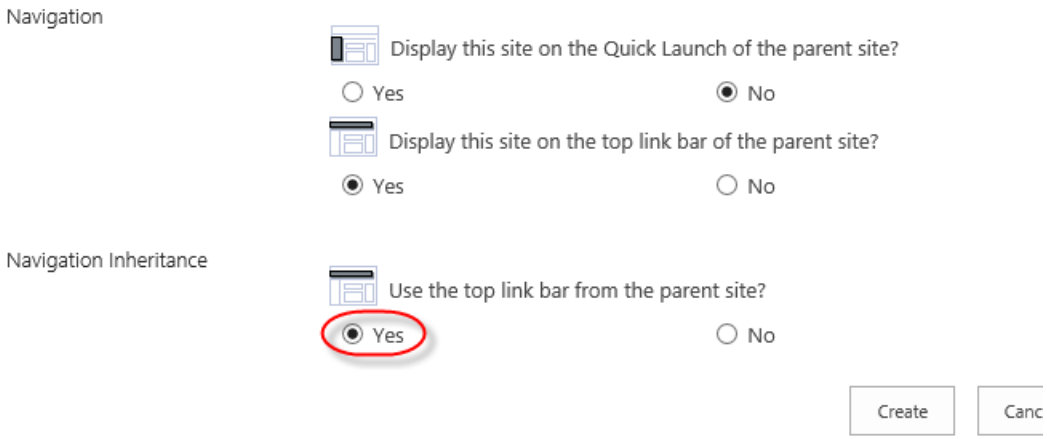
   B. Scroll to the bottom of the site contents page and click the **new subsite** link.



C. Select the **Blog** template and enter “Student Blog” in the **Title** field and “studentBlog” in the **URL name** field.

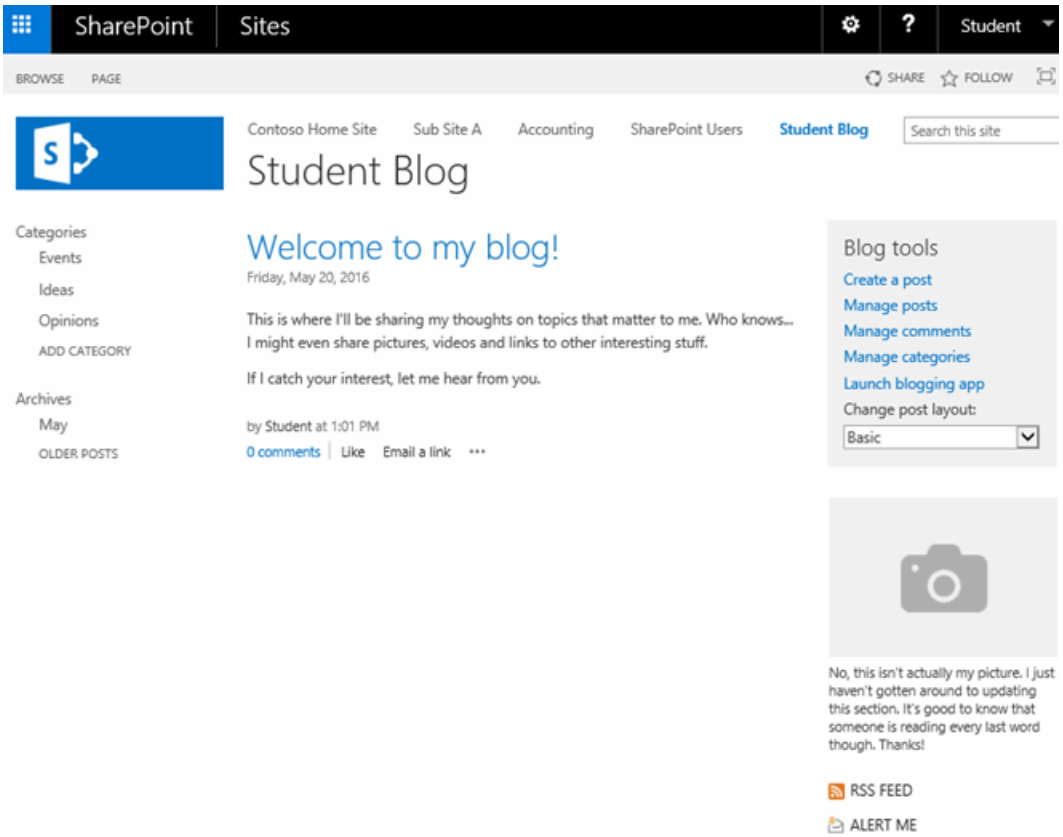


D. Scroll down and change the **Navigation Inheritance** to **Yes** to use the top link bar of the parent and then click the **Create** button to complete the new blog sites creation process.

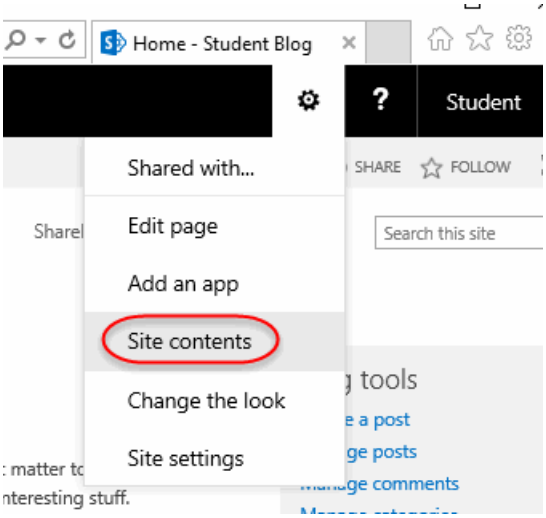


2. Explore the layout and contents of the new Blog site.

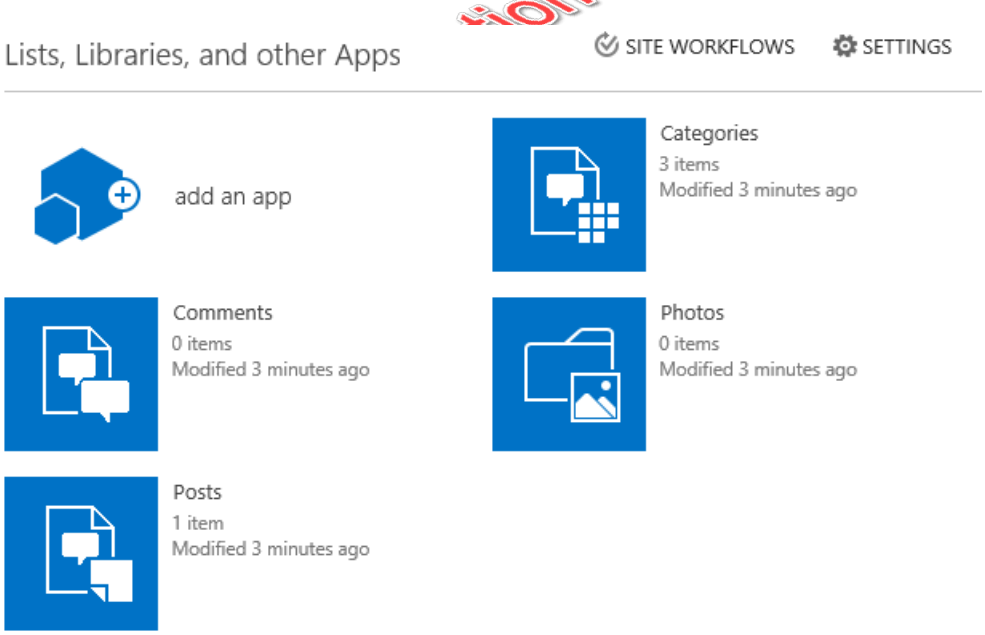
   A. Take a few moments to read the text within the **Home** page of the new blog site.



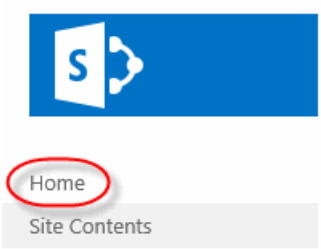
   B. Click the **Settings** drop-down and click the **Site Contents** link from the menu.



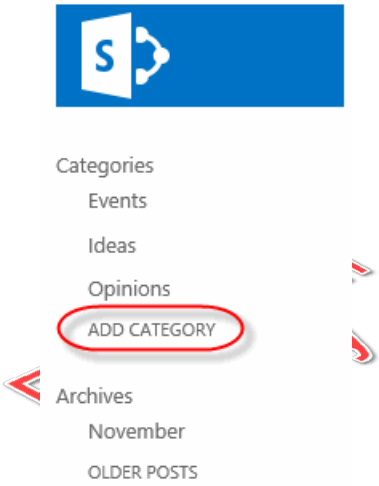
C. Note that the default content for a **Blog** is one library, **Photos**, and three lists, **Categories**, **Comments**, and **Posts**.



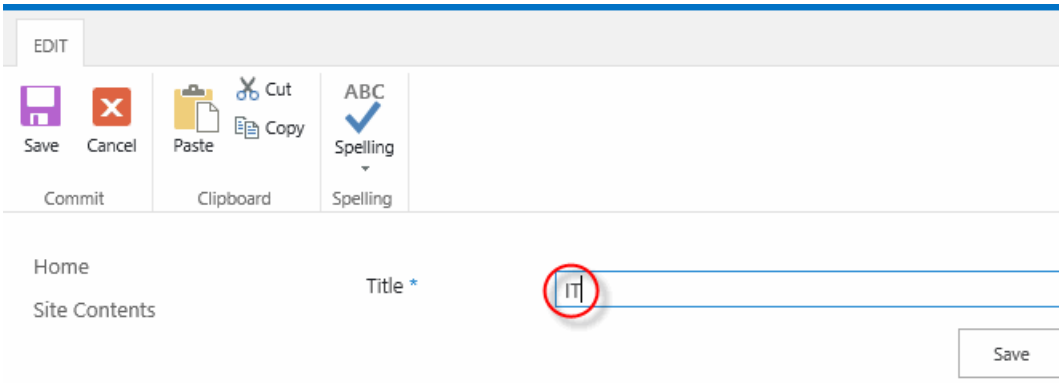
D. Click the **Home** link in the **Quick Launch** menu to navigate back to the Home page of the blog site.



3. Modify the existing **Categories** and create a new category.
   A. Click the **ADD CATEGORY** link on the **Quick Launch** menu.

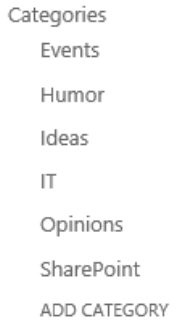


   B. Type “IT” in the **Title** field of the **Categories** edit form.



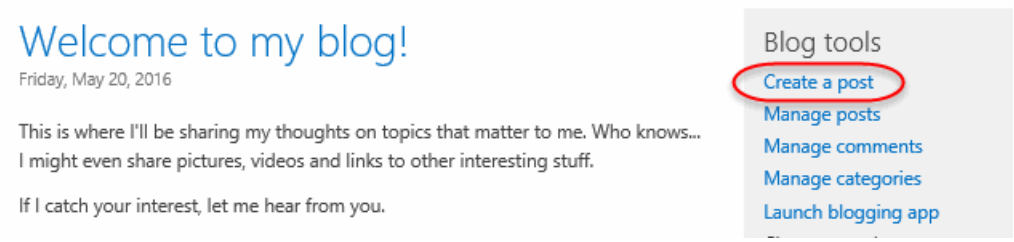
   C. Click the **Save** button to save the change.
   D. Repeat the previous steps to create categories for “SharePoint” and “Humor”.

E. Your final list should look similar to the following image.

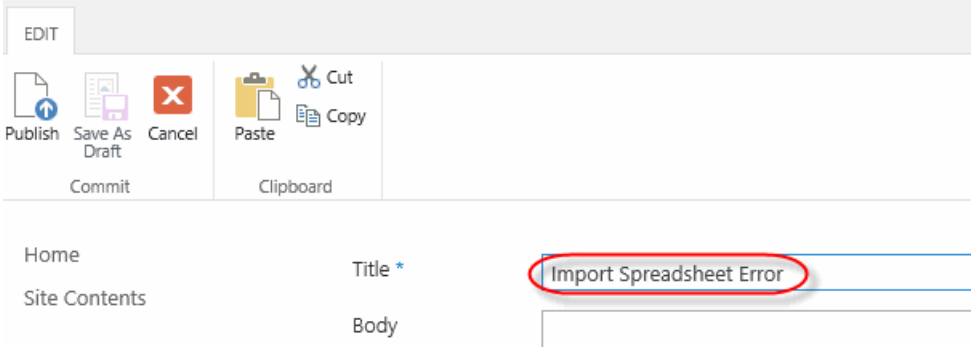


4. Create a new blog entry in your blog site

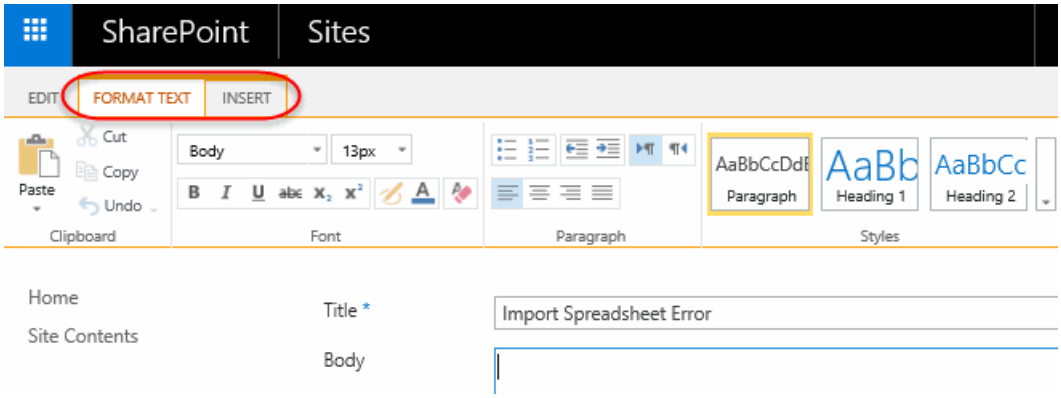
A. Click the **Create a post** link under the **Blogs tools** area.



B. In the **Posts - New Item** form, enter "Import Spreadsheet Error" for the **Title field.**

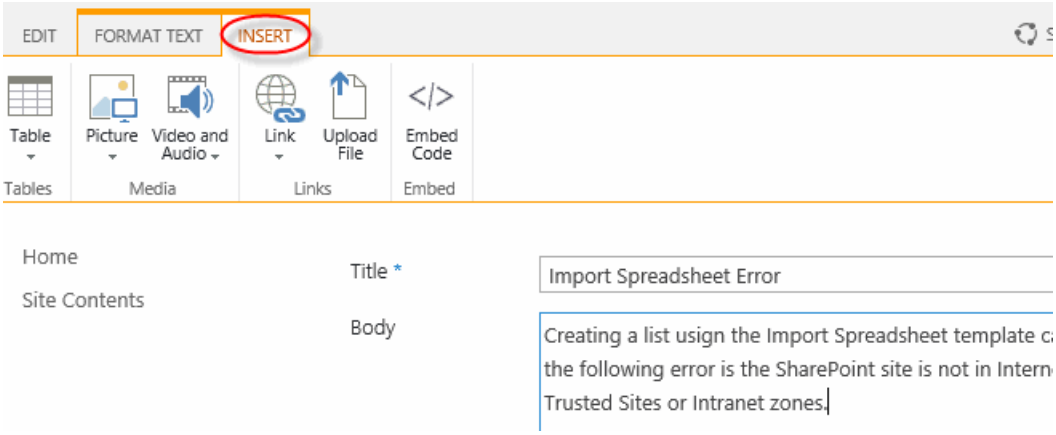


C. Click inside the **Body** field. Note the **Posts - New Item** form changes the toolbar to enable you to enter formatted text as well as insert items such as images.



D. Type the following text into the **Body** field, “Creating a list using the Import Spreadsheet template can generate the following error if the SharePoint site is not in Internet Explorer’s Trusted Sites or Intranet zones.”

E. Click the **Insert** tab in the **Editing Tools** toolbar.

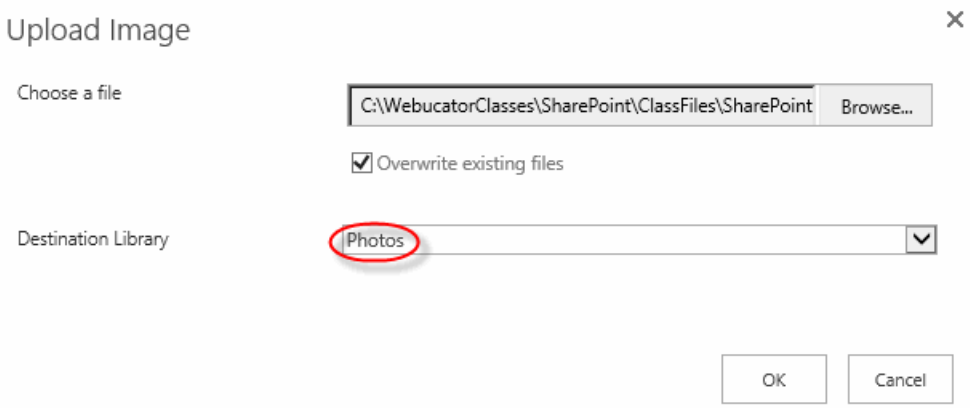


F. Click the **Picture** drop-down link on the **Insert** toolbar and choose **From Computer**.

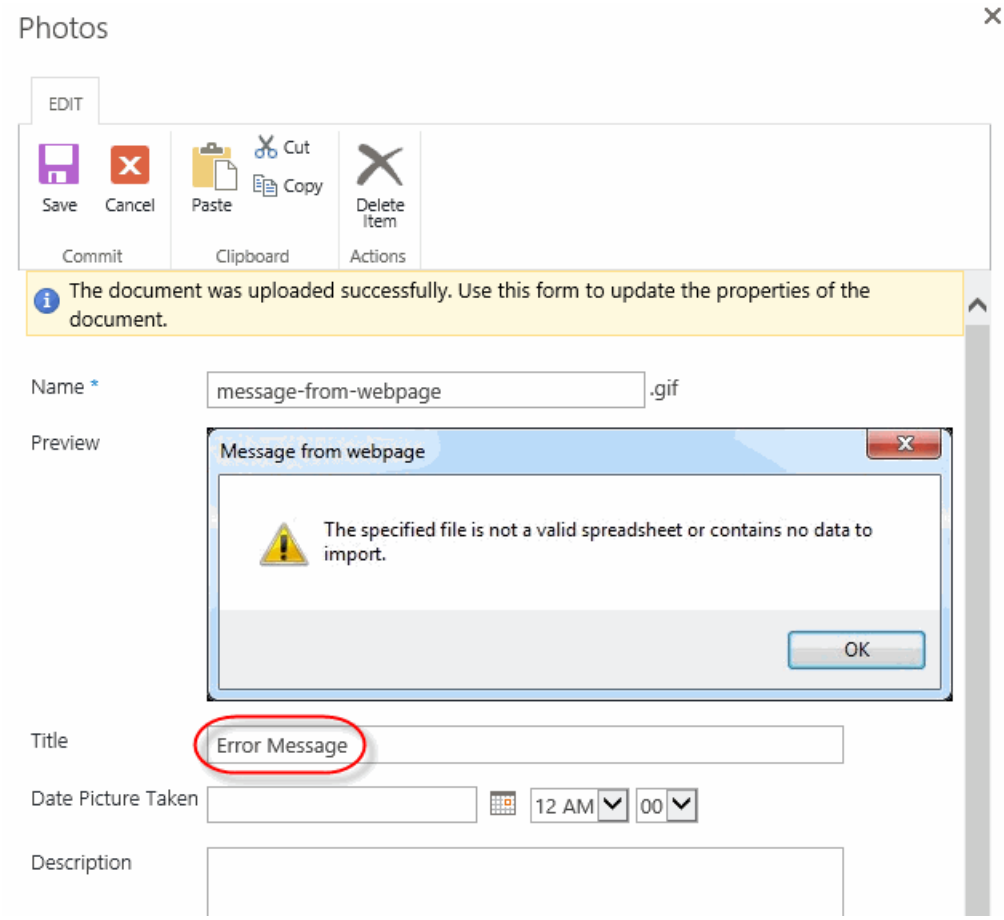
G. In the **Select Picture** dialog form, click the **Browse** button to open the **Choose File to Upload** dialog window.

H. Navigate to the you downloaded the class files to and select the `message-from-webpage.gif` file. Click the **Open** button to complete the file selection.

I. Click the **OK** button to complete the image upload. Note that the file will be loaded to the **Photos** library by default.



J. The **Photos** item editor form will open and provide you with optional information fields you can include with the image. Enter "Error Message" in the **Title** field and click the **Save** button to save your changes to the image item.

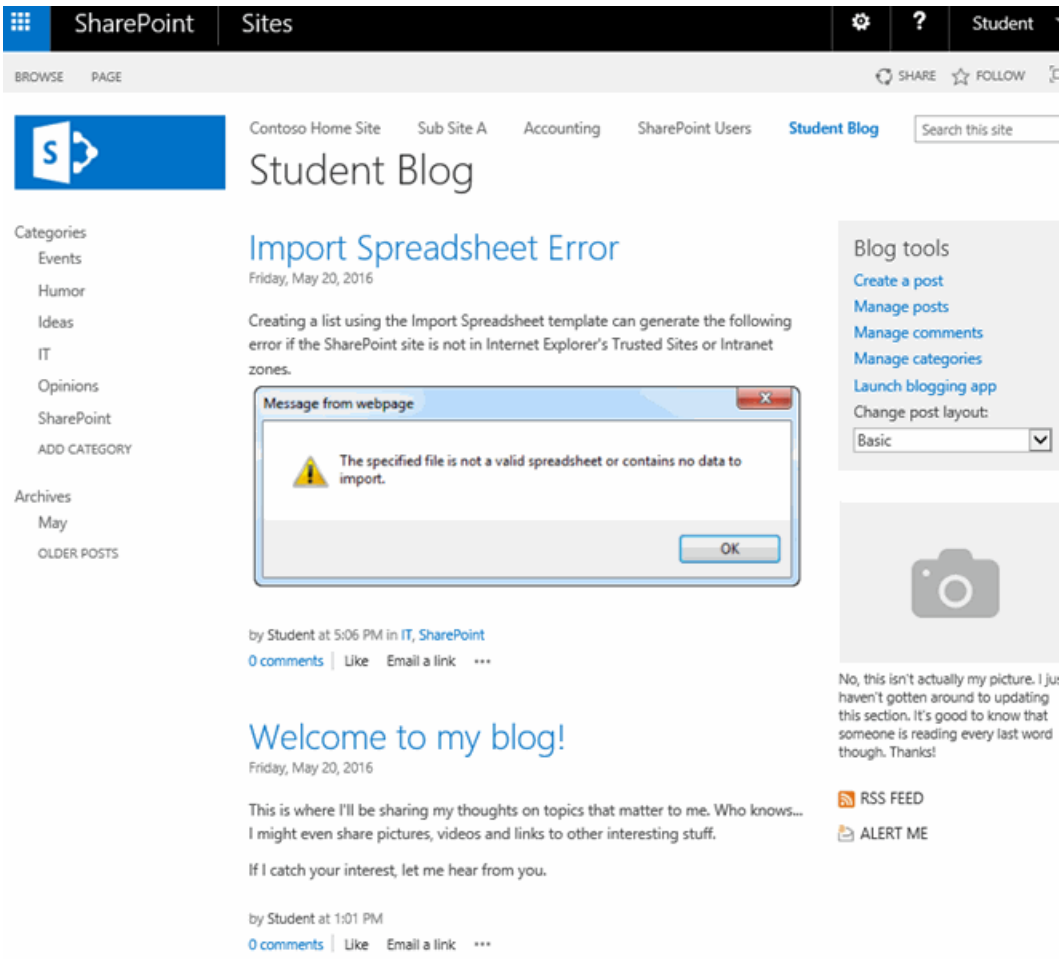


K. Highlight both **IT** and **SharePoint** in the **Category list** box and click the **Add** button. This will associate this post with those categories.

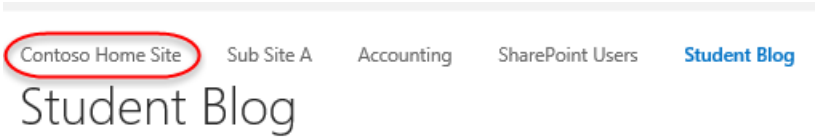
L. Click the **Publish** button to complete the creation of the new blog post.

> **Note**
>
> Alternatively, the **Save As Draft** would have created a post that would not be visible to the public until it had been published.

M. The Home page with the new blog entry should look similar to the following image.



5. Click the **Contoso Home Site** in the **Top Link Bar** to navigate back to the parent site.



Conclusion

In this lesson, you have learned:

- What Site Templates are.
- About the different types of Site Templates that come “out of the box” with different versions of SharePoint.
- How to create a new site using Site Templates.
- How to create a Project site.
- How to create a Team site.
- How to create a Community site.
- How to create a Blog site.
- How to manage the sites listed in the **Top Link Bar**.

LESSON 6
Page Content

Topics Covered

☑ Wiki pages.

☑ Web Part pages.

☑ Adding content to the Team Site Home page.

☑ Changing the layout of the Team Site Home page.

☑ Creating a Web Part page.

☑ Creating a wiki page library.

☑ Adding and managing Web Parts.

Introduction

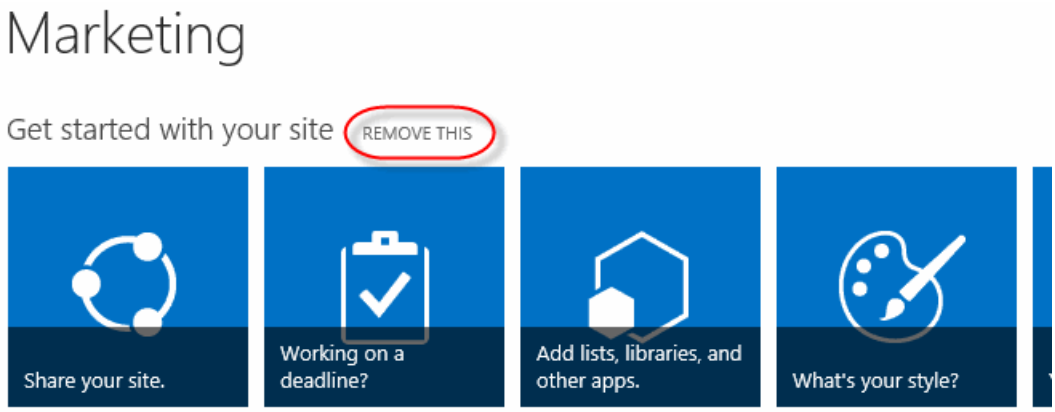
SharePoint offers a couple of ways to add content to the pages in a site. The latest technique and the one implemented by the Team Site template is through wiki style pages. Another method that has been part of SharePoint since the beginning is the use of Web Parts and Web Part pages. Both techniques are similar in the output that can be created, and both Web Part pages and wiki pages share the ability to add Web Parts to them.

6.1. Wiki Library Pages

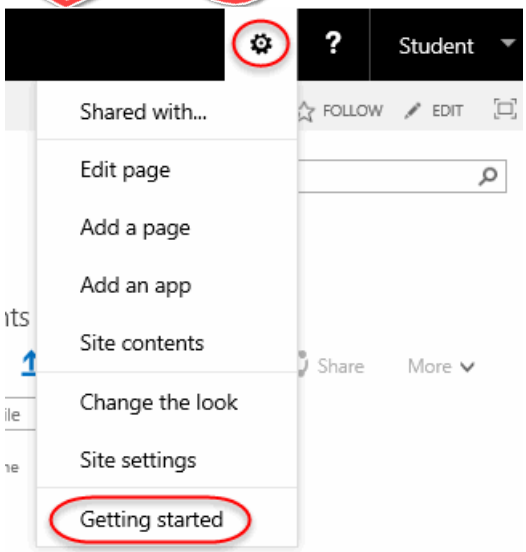
❖ 6.1.1. Editing the Team Site Home Page

This walk-through will show you how to edit the Home page of a team site. This walk-through will use the **Marketing** team site created in an earlier walk-through. Sites based on the **Team Site** template store their default Home page in the **Site Pages** library that is an instance of a wiki library. The walk-through explore some of the tools available to wiki pages by modifying the site's Home page.

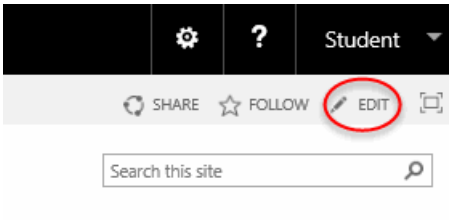
1. Navigate to the **Marketing** team site in your browser.
2. Remove the **Get started with your site** section from the home page.
   A. Click the **REMOVE THIS** link at the top of the **Get started with your site** section



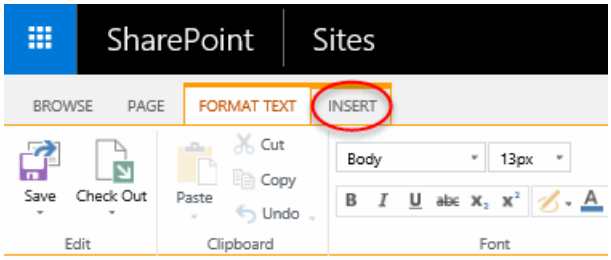
   B. Click the **OK** button on the **Message from web page** dialog asking you to confirm the removal.
   C. Note that you can still access the **Getting Started** tasks from the **Settings** menu at any time.



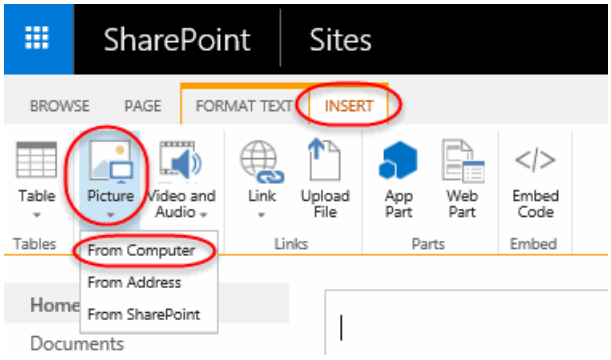
3. Add an image to the home page of the **Marketing** site.
   A. Click the **EDIT** link located below the **Settings** cog icon.



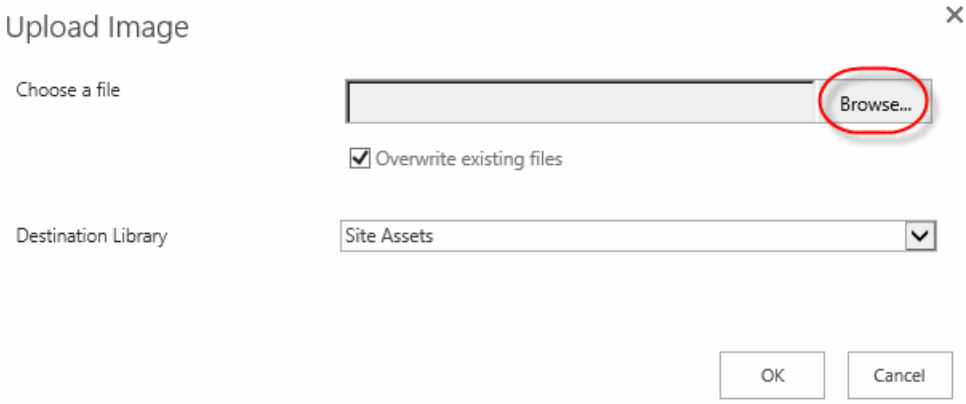
B. Click the **INSERT** tab to open the toolbar.



C. Click the **Picture** drop-down link and choose **From Computer** in the list.



D. In the **Upload Picture** dialog form click the **Browse** button to open the **Choose File to Upload** dialog window.

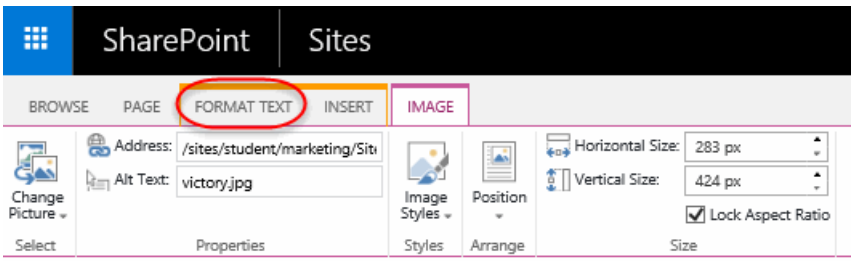


E. Navigate to the course files folder and select the `victory.jpg` file. Click the **Open** button to complete the file selection.

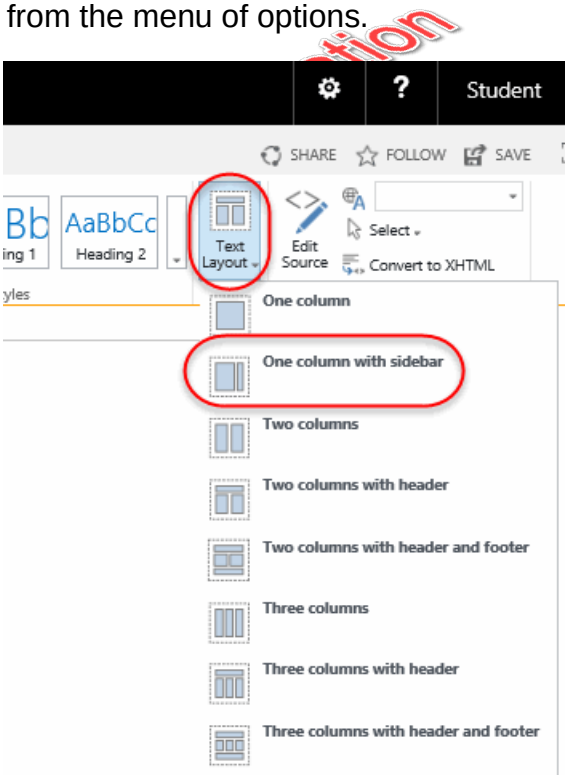
F. Click the **OK** button to complete the image upload. Note that the file will be loaded to the **Site Assets** library by default.

4. Change the layout of the **Marketing** site's Home page.

A. With the **Marketing** site's Home page still in edit mode, click the **Format Text** tab to open the toolbar.



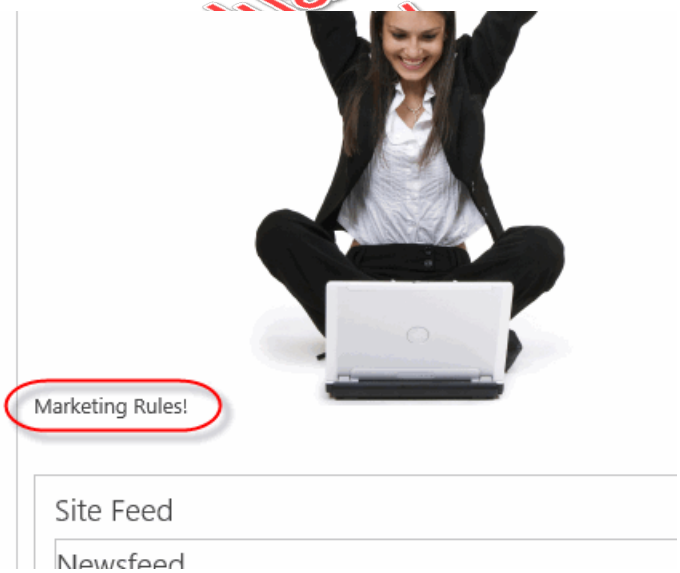
B. Click the **Text Layout** drop-down button and select **One column with sidebar** from the menu of options.



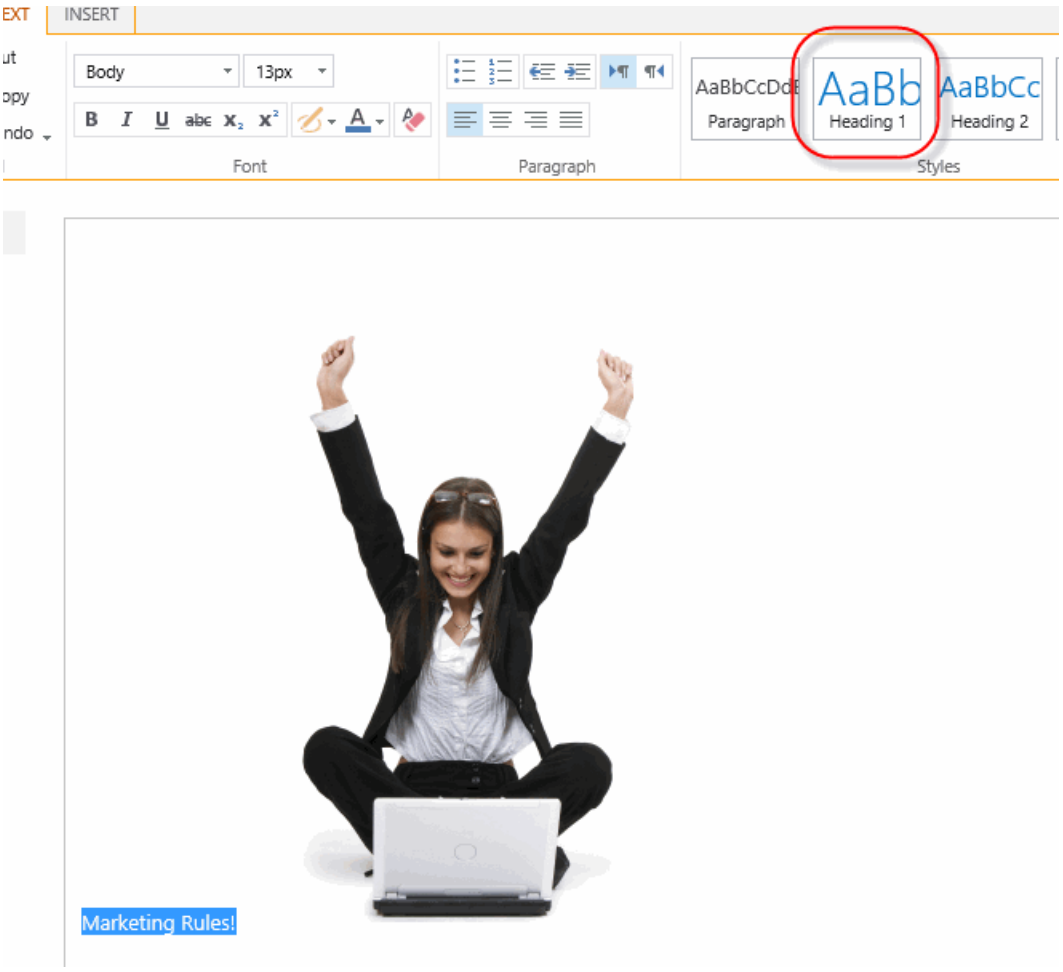
5. Add text above the image added earlier.

A. Hover and click just to the left of the image so that the insertion point is located right next to the image.

B. Type the following text to the left of the image: `Marketing Rules!`

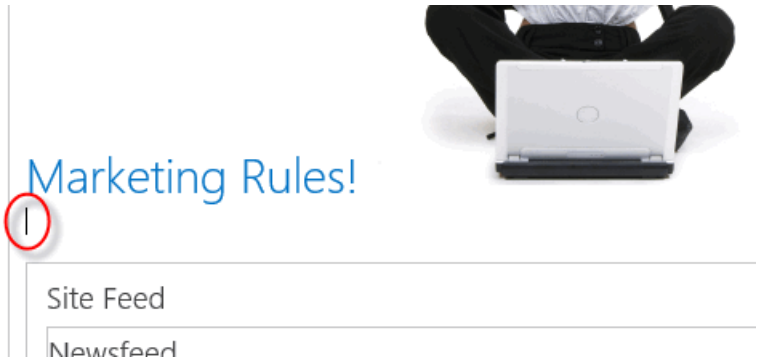


C. Highlight the text we just typed, “Marketing Rules!” and click the **Heading 1** option from the **Styles** area of the **Format Text** toolbar.

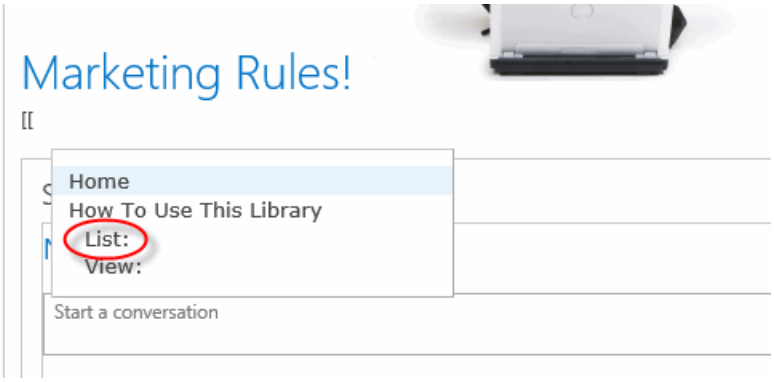


6. Add a link to the **Site Assets** list inside the new region below the heading from the previous steps.

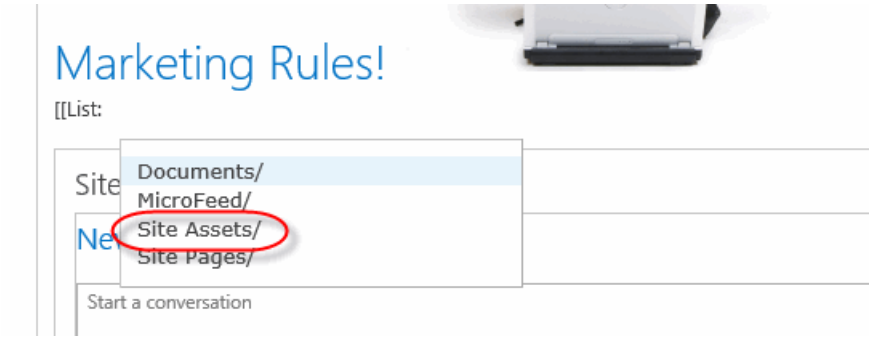
   A. With the Home page still in edit mode hover and click to add your insertion point just below the “Marketing Rules!” text.



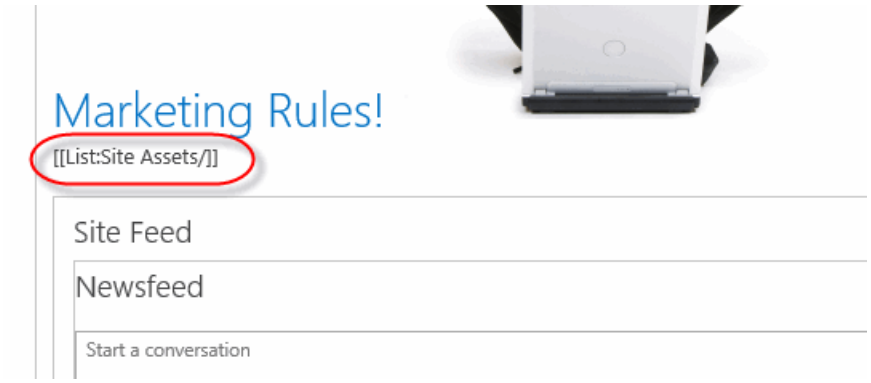
B. On the new line type the following: [[. A menu will open after you type the second "[", select **List:** from the menu.



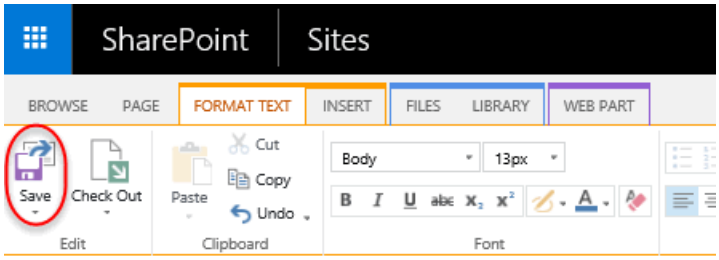
C. From the second menu, select **Site Assets/** from the list.



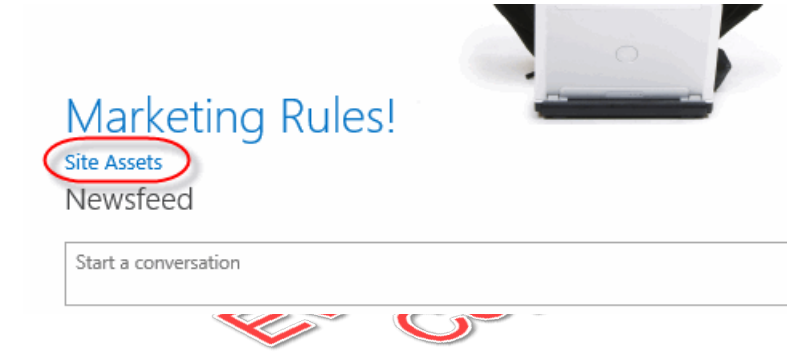
D. A matching set of "]]" should be automatically added to the end of what we entered in the previous steps. The completed link should look similar to the following image.



E. Click the **Save** button on the toolbar to save your changes.



F. Verify the wiki style link to **Site Assets** works by clicking it. It should take you to the **Site Assets** library.



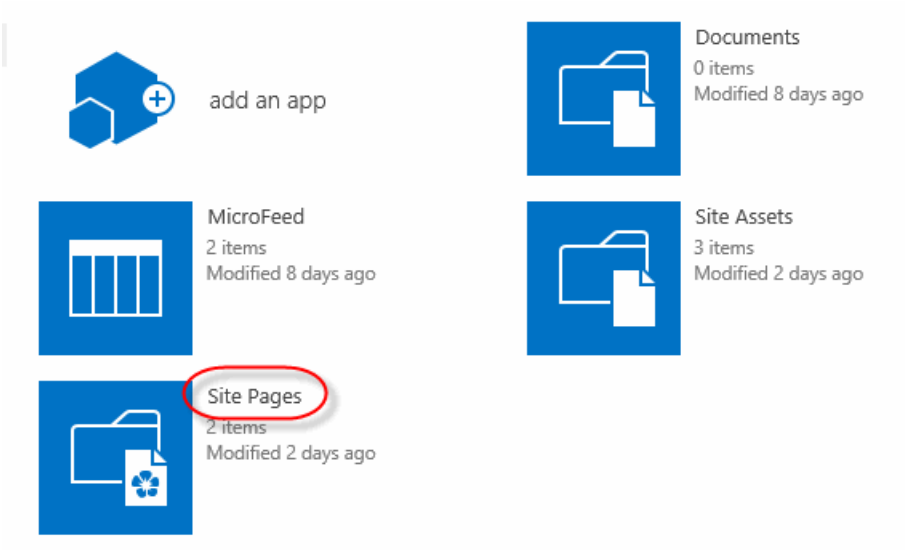
6.2. Web Part Pages

❖ 6.2.1. Creating a Web Part Page

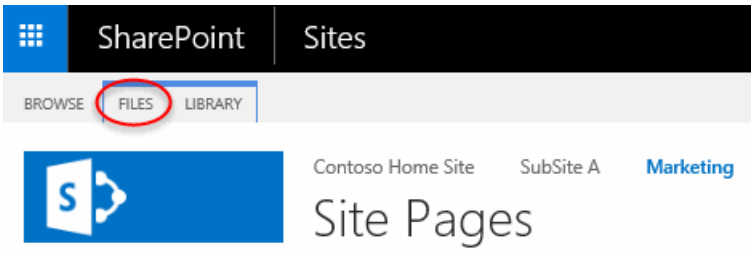
This walk-through will show you how create a new Web Part page in a team site. This walk-through will use the **Marketing** team site created in an earlier walk-through.

1. Open your browser if it is not already open and navigate to the **Marketing** site.
2. Create a new Web Part page in the **Site Pages** library of the **Marketing** site.
   A. Click the **Site Contents** link the **Marketing** site's **Quick Launch** menu.

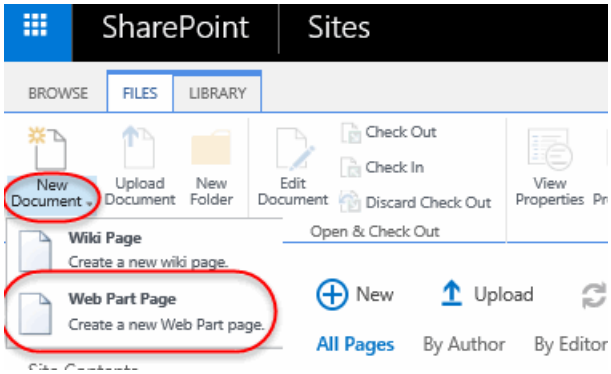
B. Click the **Site Pages** link on the **Site Contents** page.



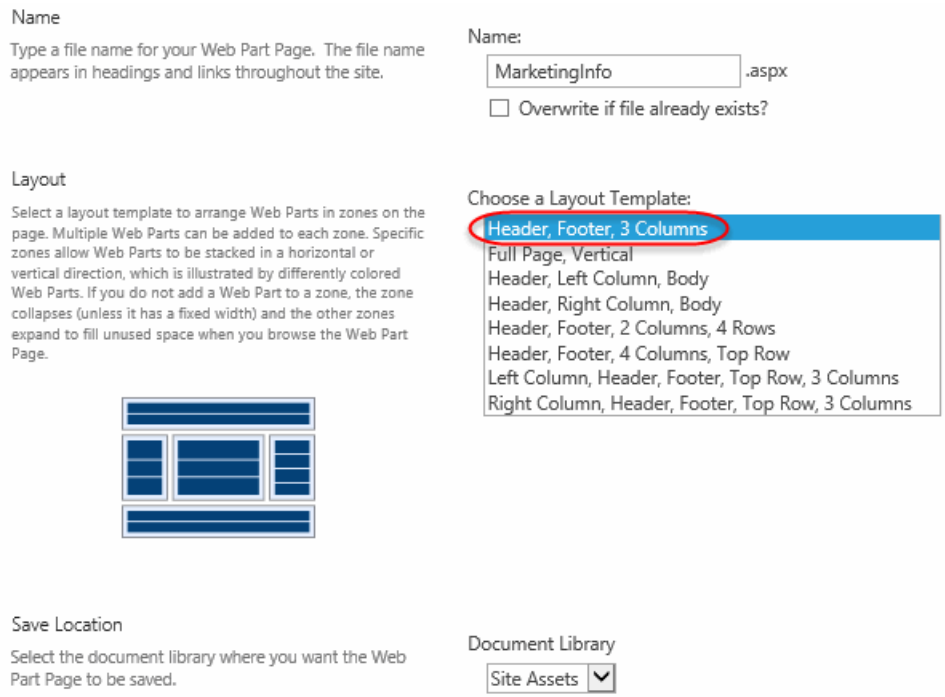
C. Click the **FILES** tab in the **Site Pages** library to open the toolbar.



D. Click the **New Document** drop-down button and choose **Web Part Page** from the options menu.

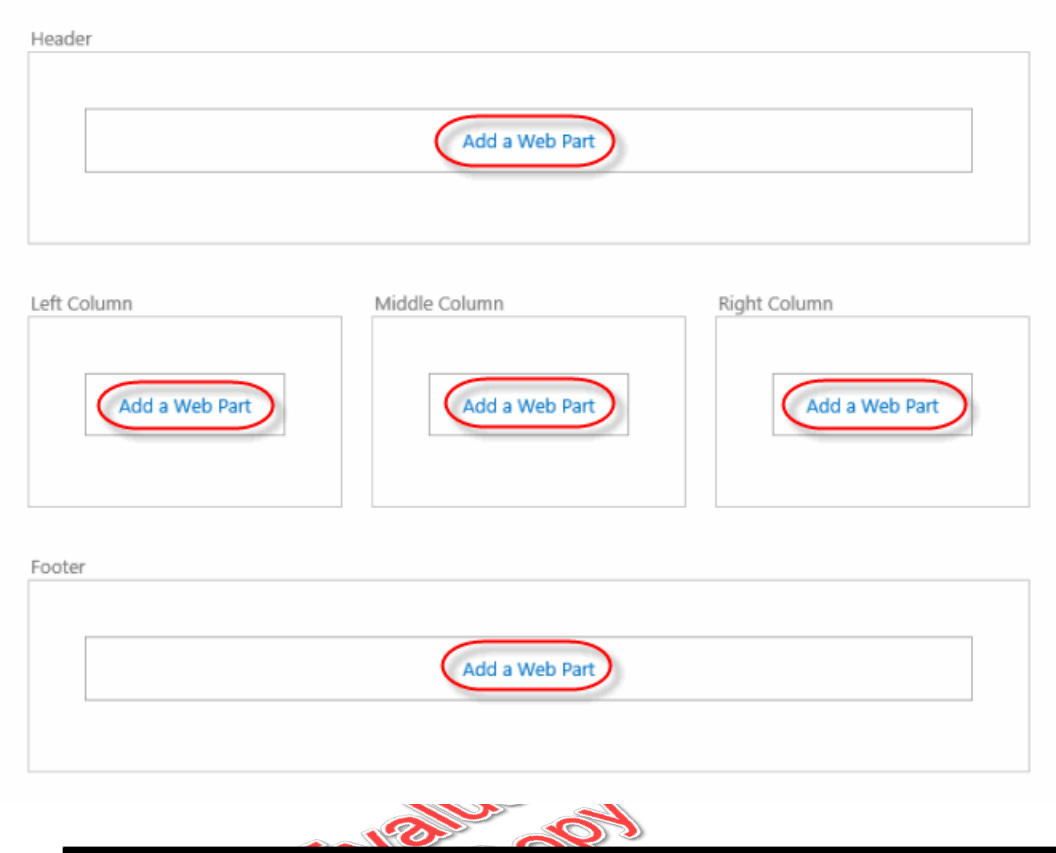


E. Type “MarketingInfo” in the **Name** field. Take a moment to read through the different options in the **Layout** list box as well as the options in the **Save Location** combo box.



F. Select **Header, Footer, 3 Columns** in the **Layout** list box and change the **Document Library** to **Site Pages** as the choice for the **Save Location**. Click the **Create** button to complete the process.

G. The new Web Part page will look similar to the image below. Note the regions within the page that are arranged based on the layout option you chose when you created the page and inside those regions are links that allow you to add Web Parts.



Note

The next walk-though will show you how to add Web Parts into some of those regions.

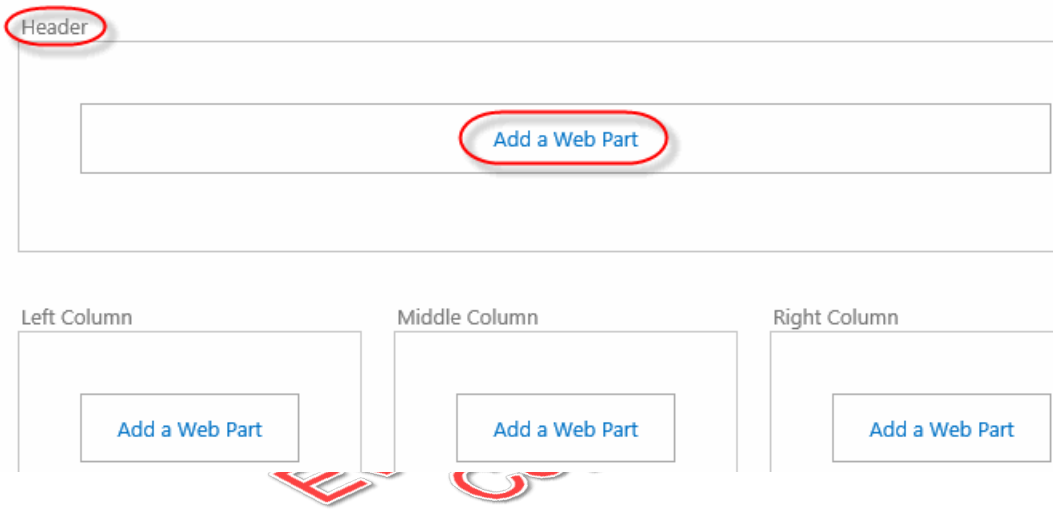
H. Leave the **MarketingInfo** page in edit mode for the next walk-through.

6.3. Working with Web Parts

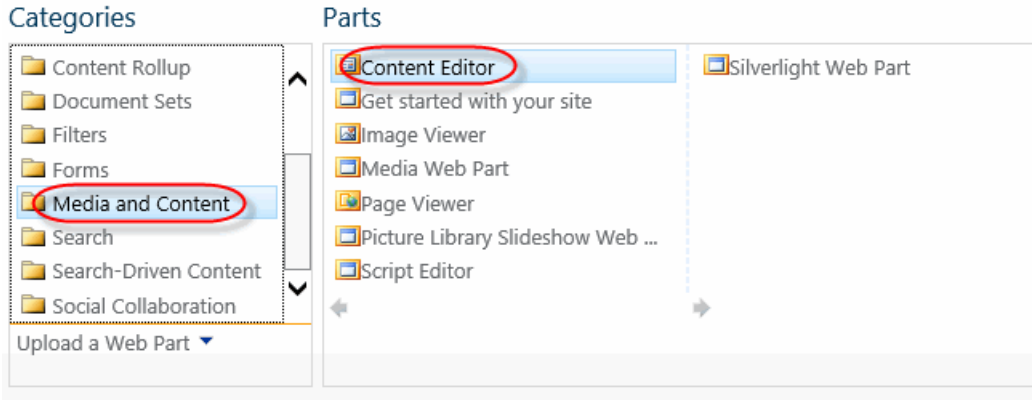
❖ 6.3.1. Adding Web Parts to Pages

This walk-through will show you how to add Web Parts to the **MarketingInfo** Web Part page of the **Marketing** site. Due to the large number of Web Parts, this walk-through will only use a few of them but the basic use and properties are shared by all Web Parts.

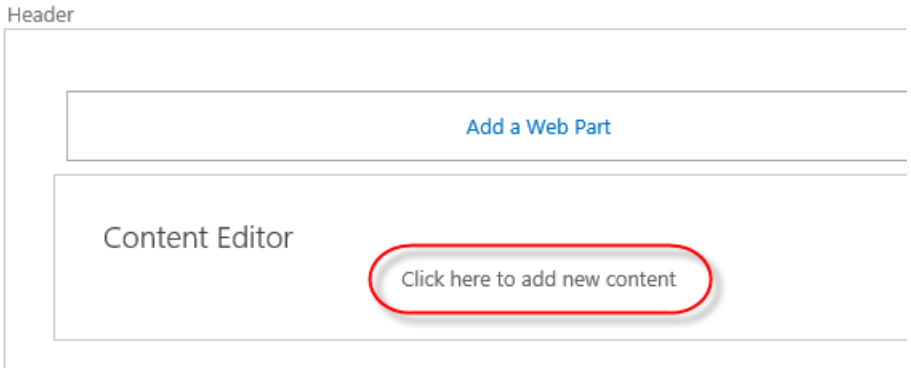
1. If the **MarketingInfo** page is not open, then open it from the **Site Pages** library in the **Marketing** site. The **Site Pages** library is not listed on the **Quick Launch** menu by default so to view it you can click the **Site Contents** link within the **Quick Launch** menu.
2. Add a **Content Editor** Web Part to the **Header** region of the **MarketingInfo** page.
   A. With the **MarketingInfo** page open in edit mode, click the **Add a Web Part** link in the **Header** region.



   B. From the Web Parts list pane, select **Media and Content** under **Categories** and then select **Content Editor** from under **Web Parts**. Click the **Add** button to add the Web Part to the **Header**.

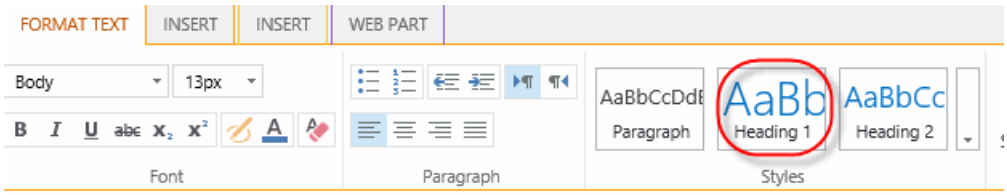


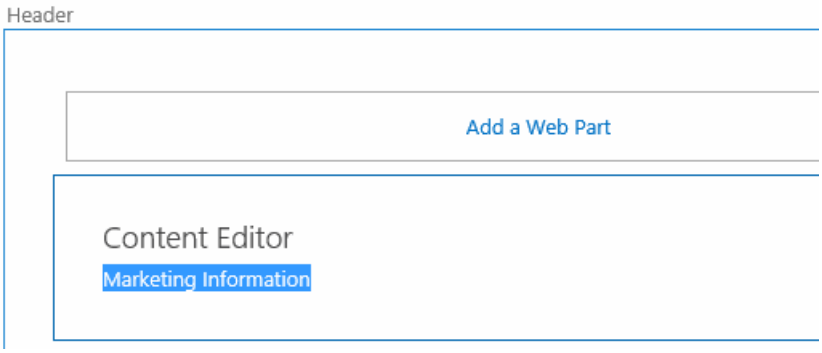
   C. Click the **Click here to add new content** link within the newly added **Content Editor** Web Part.



D. Type “Marketing Information” inside the **Content Editor** Web Part.

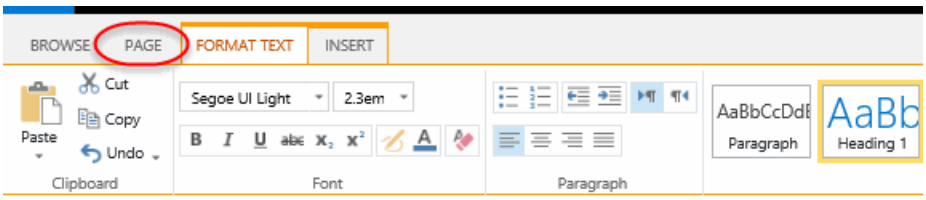
E. Highlight the text “Marketing Information” and click the **Heading 1** style from the **Styles** group in the **FORMAT TEXT** toolbar.



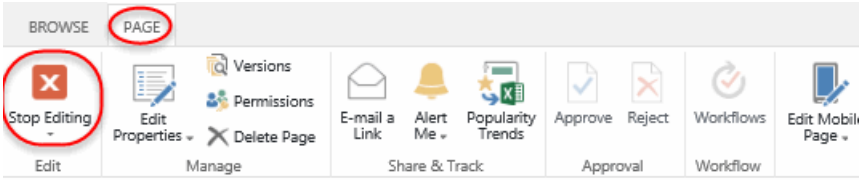


3. Save your changes to the Web Part page.

A. Click the **PAGE** tab in the toolbar.

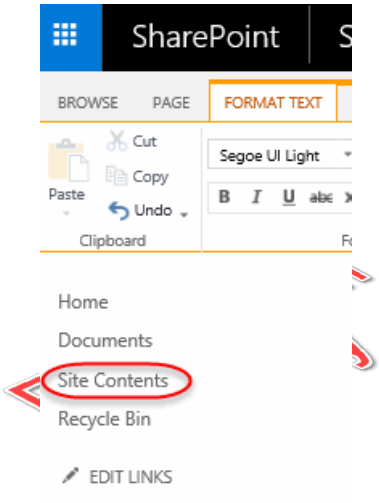


B. Click the **Stop Editing** button on the **Page** tab toolbar.



4. Add an **Image Viewer** Web Part to the **Header** region of the **MarketingInfo** page.

   A. Before you add an **Image Viewer** Web Part, you need to add an image you can link to. Click the **Site Contents** link in the **Quick Launch** menu.



   B. Click the **Site Assets** link on the **Site Contents** page.

   C. Click the **New** link on the **Site Assets** page.

   D. Click the **Browse** button in the **Add a document** dialog.

   E. Navigate to the class files folder and select the `formal-with-laptop.jpg` file. Click the **Open** button to complete the file selection.

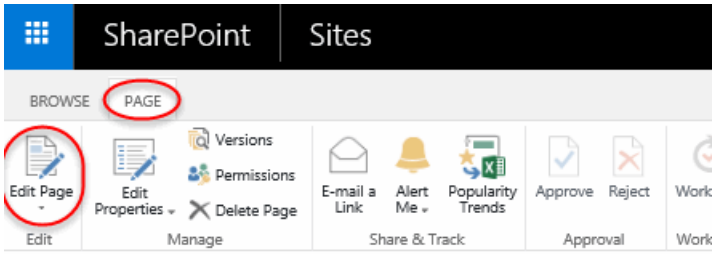
   F. Click the **OK** button to complete the upload process.

   G. Click the **Site Contents** link in the **Quick Launch** menu.

H. Click the **Site Pages** link on the **Site Contents** page.

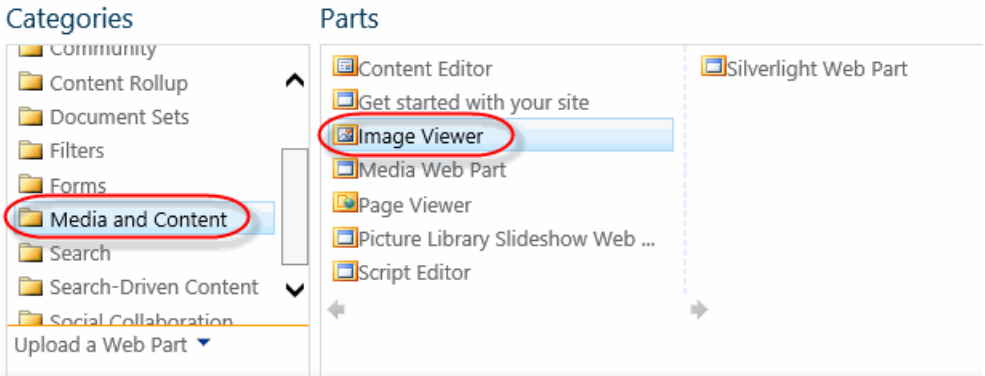
I. Click the **MarketingInfo** link in the **Site Pages** library to open our Web Part page so you can add the **Image Viewer** to it.

J. To edit the page, click the **Page** tab and select **Edit Page** from the toolbar.



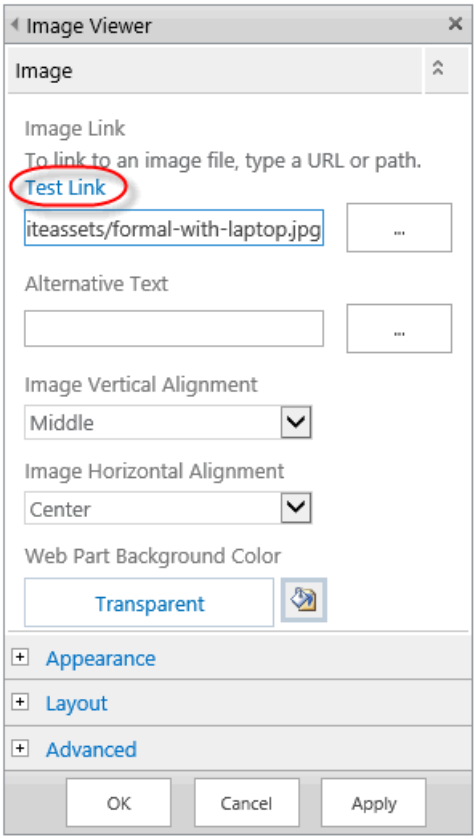
K. Click the **Add a Web Part** link above the **Content Editor** Web Part in the **Header** region.

L. From the Web Parts list pane, select **Media and Content** under **Categories** then select **Image Viewer** from under **Web Parts**. Click the **Add** button to add the Web Part to the **Header** region.



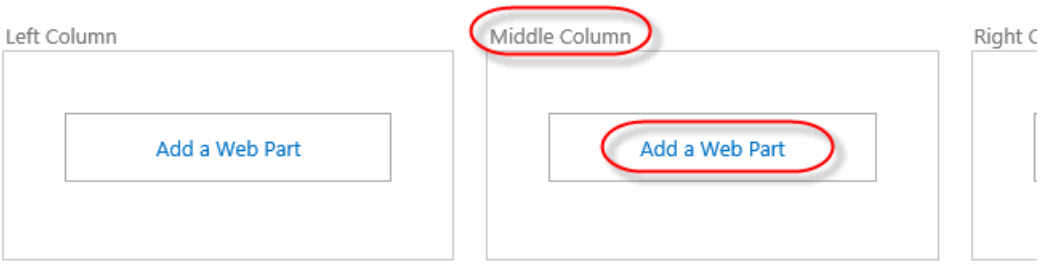
M. Click the **open the tool pane** link within the newly added **Image Viewer** Web Part.

N. In the **Image Viewer** properties pane, type either the full path or the relative page to your **Site Assets** library and the "formal-with-laptop.jpg" image. In this walk-through example the root relative path is `/sites/student/marketing/siteassets/formal-with-laptop.jpg`, you can use the **Test Link** link to verify the path. Click the **OK** button at the bottom of the properties pane once you have verified the path.

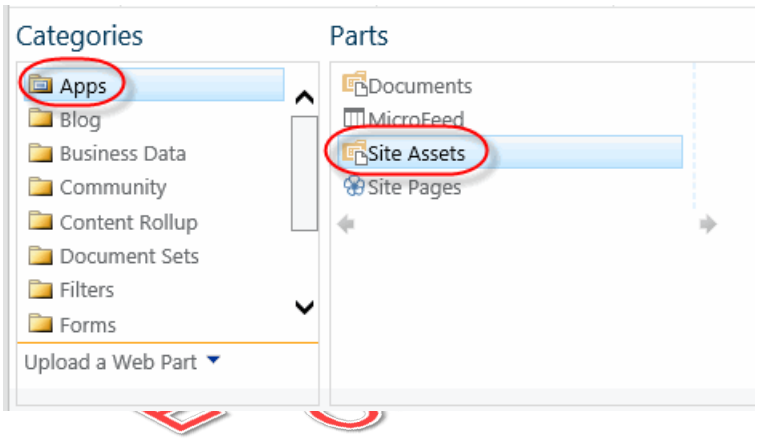


5. Add a **List View** Web Part to the **Middle Column** region of the **MarketingInfo** Web Part page.

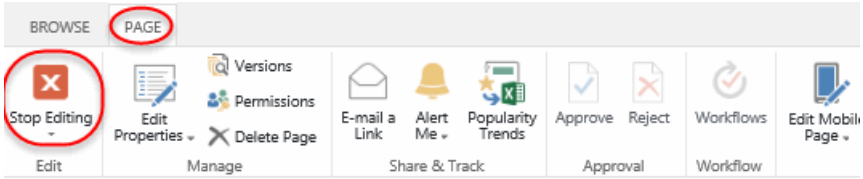
   A. Click the **Add a Web Part** link in the **Middle Column** region.



B. From the Web Parts list pane, select **Apps** under **Categories** then select **Site Assets** from under **Web Parts**. Click the **Add** button to add the Web Part to the **Middle Column** region.



6. Click the **Stop Editing** button on the **PAGE** tab toolbar to view the results.

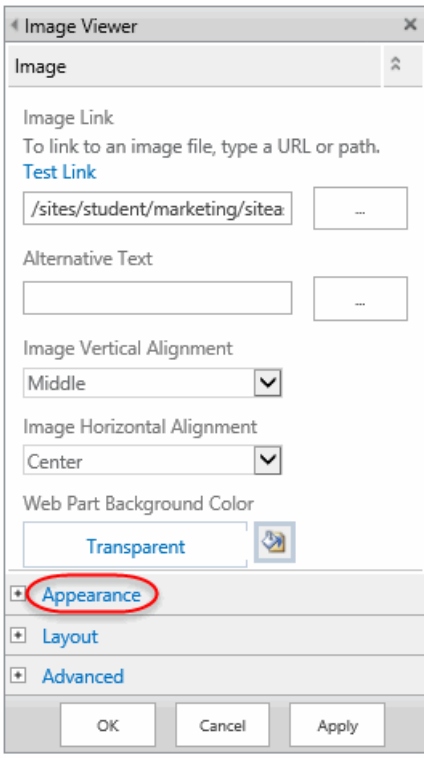


7. Remove the **Image Viewer** and **Content Editor** titles from their respective Web Parts.

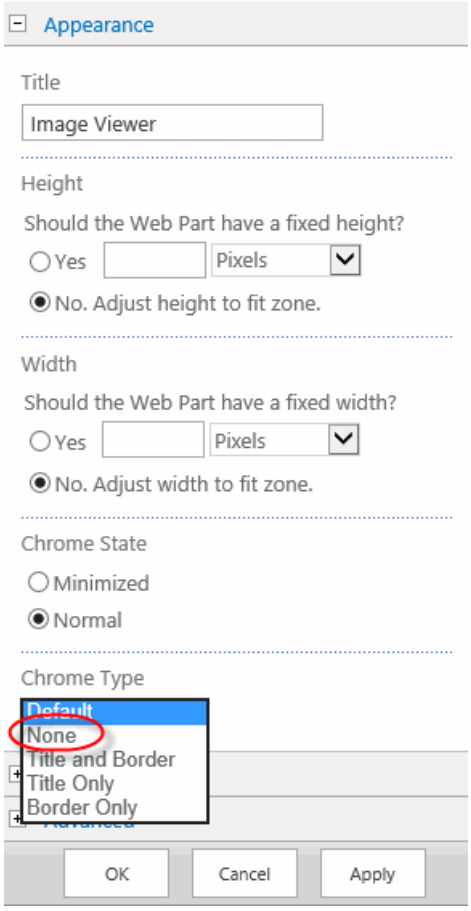
A. Click the **Edit Page** link on the **Page** toolbar.

B. Hover the mouse cursor over the upper-right corner of the **Image Viewer** Web Part and click the down-down **arrow** that appears. Select **Edit Web Part** from the drop-down menu.

C. In the **Image Viewer** Web Part properties pane, expand the **Appearance** settings.



D. In the expanded **Appearance** settings, click the **Chrome Type** drop-down field and select **None** from the list.



E. Click the **OK** button at the bottom of the properties pane to save the changes to the Web Part.

F. Repeat the previous steps to remove the title from the **Content Editor** Web Part.

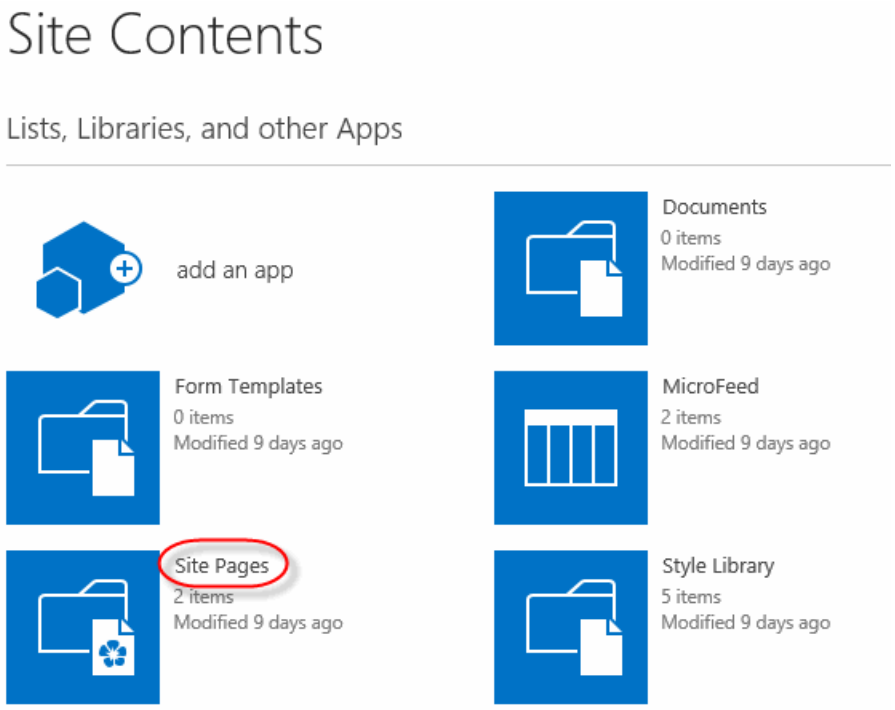
G. Click the **Stop Editing** button on the **PAGE** toolbar to see the results.

Exercise 12: Working with Wiki Pages

15 to 25 minutes

In this exercise, you will add a new wiki page to the root parent site's **Site Pages** wiki library. You will explore the editing tools by editing and adding content to the new wiki page.

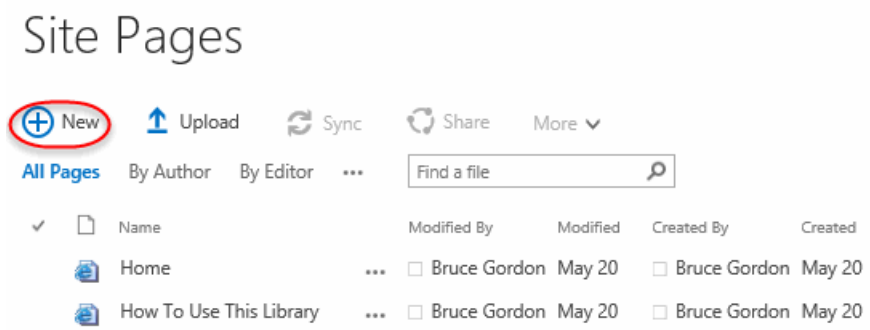
1. Create and edit a new page in the **Site Pages** library of your root parent site.
   A. Make sure you are on the Home page of the root site.
   B. Click the **Site Contents** link in the **Quick Launch** menu.
   C. Click the **Site Pages** link on the **Site Contents** page.



Note

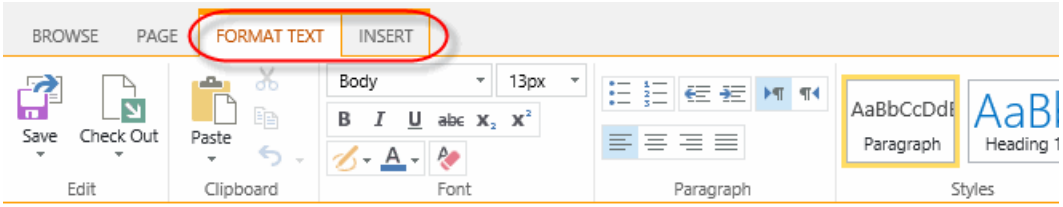
The **Site Pages** is a wiki page library created by default when the Team Site was created. It is also where the sites default Home page is located.

D. Click the **New** link in the **Site Pages** library page.



E. In the **New Item** form, enter "NewCEO" in the **New page name** field. Click the **Create** button to complete the process.

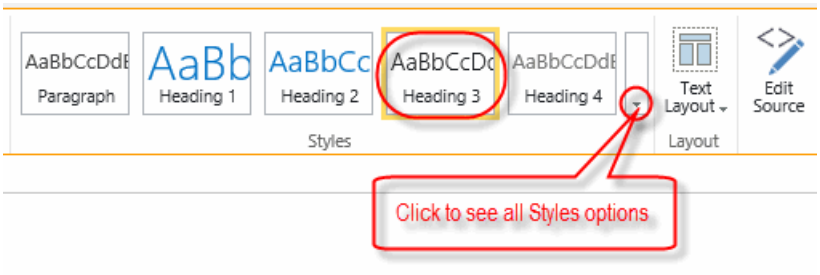
F. Your browser will now be on the new blank page in edit mode. Take a few moments to familiarize yourself with the **FORMAT TEXT** and **INSERT** toolbars.



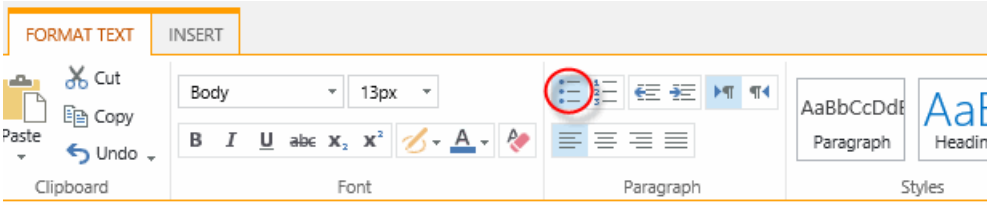
G. Enter the following text into the new page, each on a separate line:

```
New CEO of Contoso
Please Welcome Wilbur Whipple as the new CEO of Contoso.
Wilbur's achievements to date include:
Masters degree from NYU
Former CEO of Intel
Retired Marine Sergeant
```

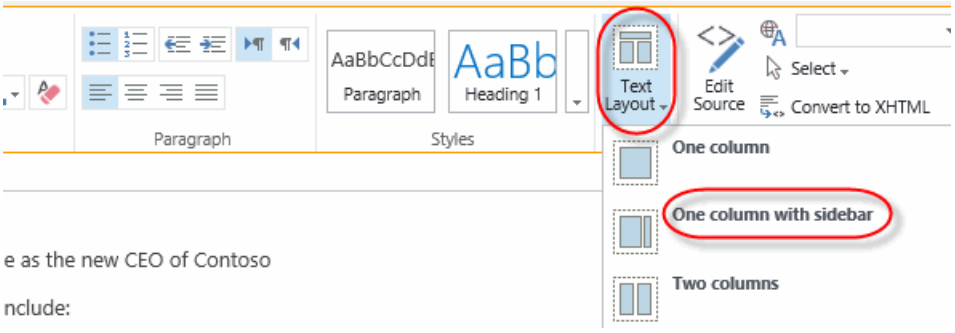
H. Select and highlight the line “New CEO of Contoso” and click the **Heading 3** option from the **Styles** options in the **FORMAT TEXT** toolbar.



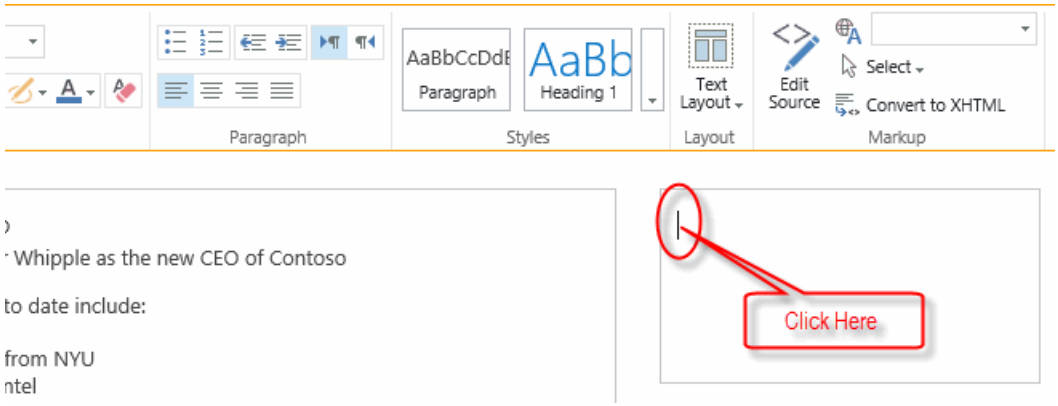
I. Select and highlight the three lines of Wilbur’s achievements, Master’s degree from NYU, Former CEO of Intel, and Retired Marine Sergeant. Click the **Bullets** button on the **FORMAT TEXT** toolbar in the **Paragraph** group.



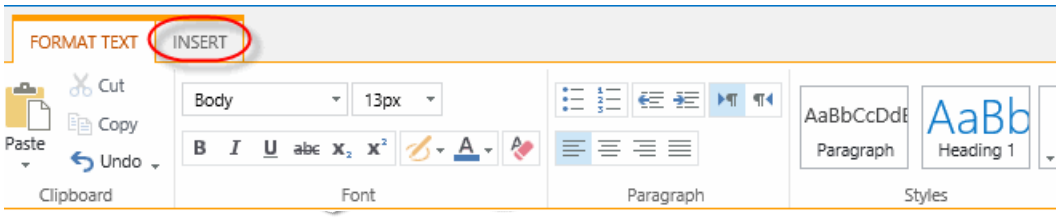
J. Click the **Text Layout** drop-down button on the **FORMAT TEXT** toolbar in the **Layout** group. Select the **One column with sidebar** option.



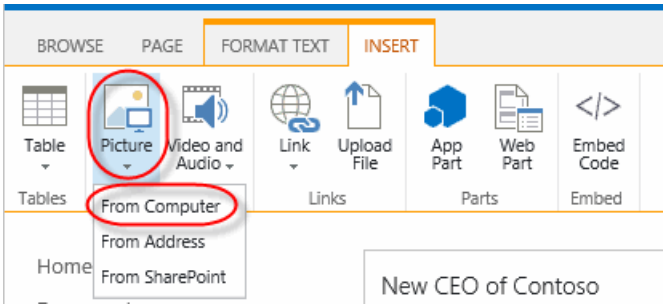
K. Click in the upper-left corner of the new sidebar box to place your insertion bar at that point.



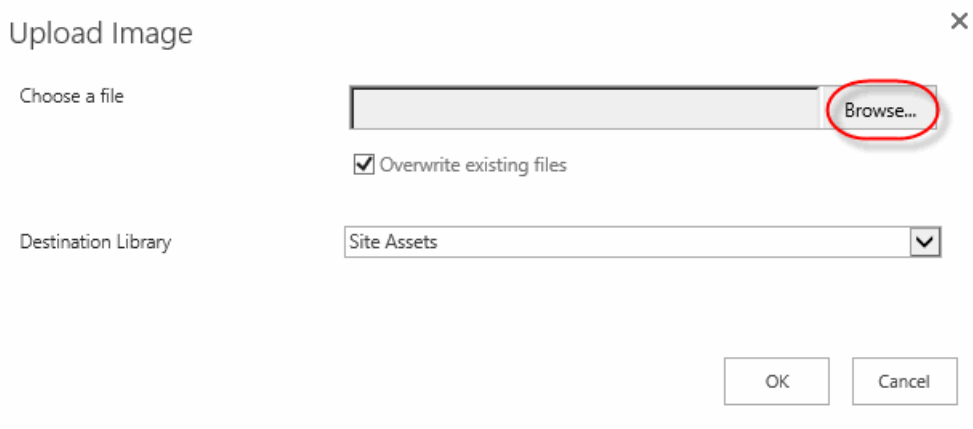
L. Click the **INSERT** tab to open the toolbar.



M. Click the **Picture** drop-down in the **INSERT** toolbar and select the **From Computer** option.



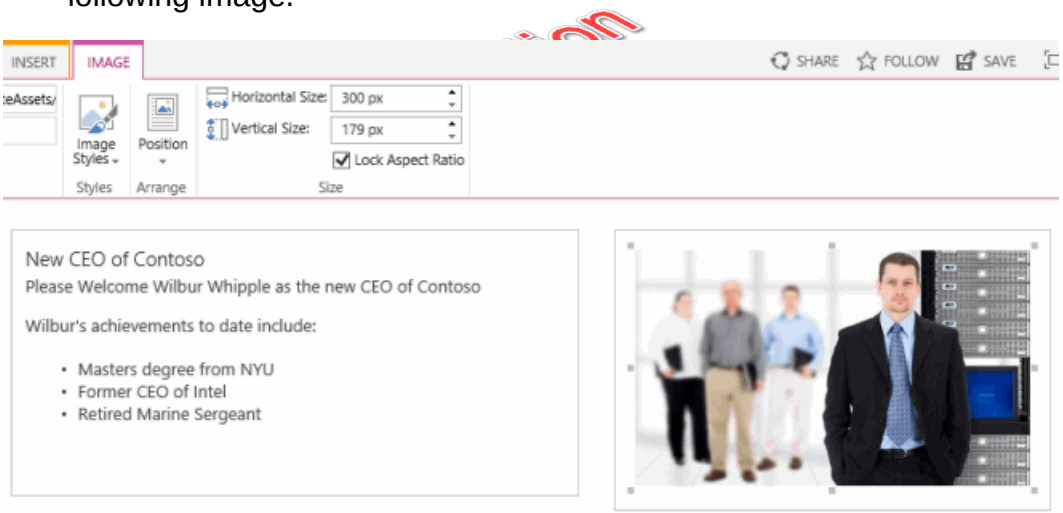
N. In the **Upload Image** dialog form, click the **Browse** button to open the **Choose File to Upload** dialog window.



O. Navigate to the folder you downloaded the class files to and select the `ceo-wilbur.jpg` file. Click the **Open** button to complete the file selection.

P. Click the **OK** button to complete the image upload. Note that the file will be uploaded to the **Site Assets** library by default.

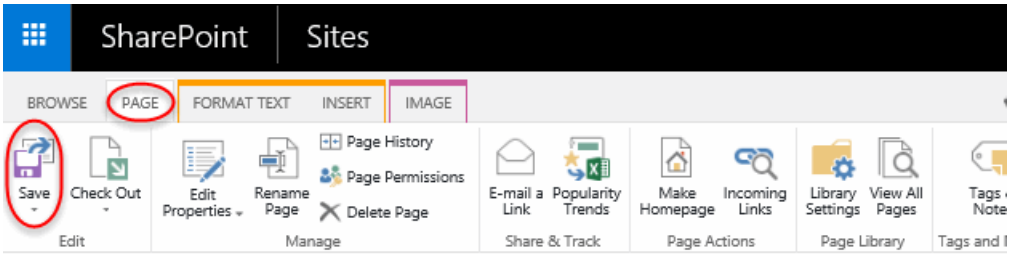
Q. The final formatted version of the wiki page should look similar to the following image.



Note

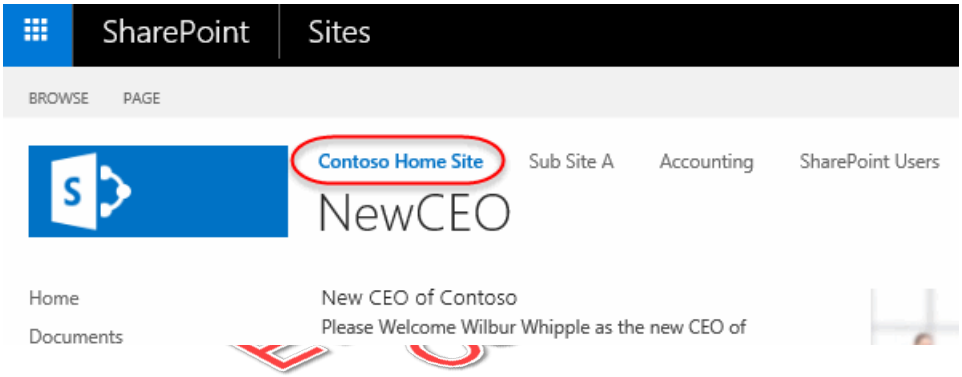
Note that with the picture selected in the wiki page there is a new **IMAGE** toolbar tab for formatting the picture on the page.

R. Click the **PAGE** tab and then click the **Save** button to save your wiki page edits back to the **Site Pages** wiki library.

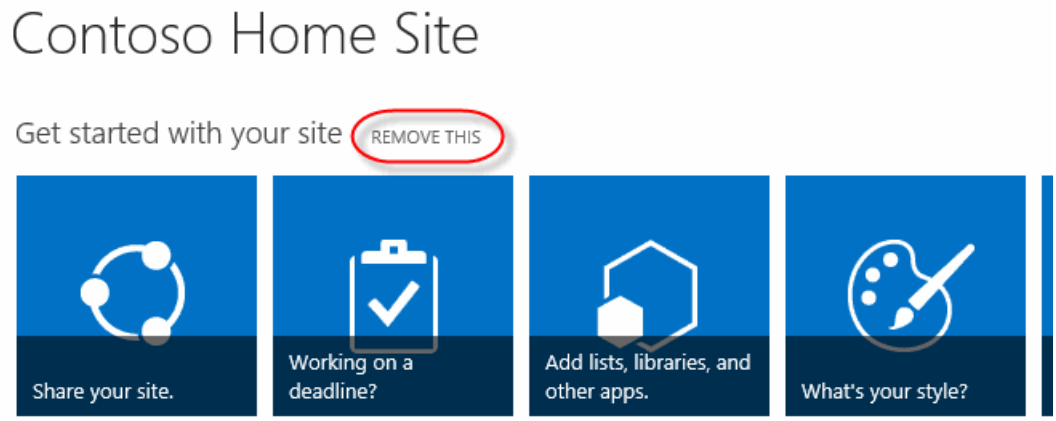


2. Edit the Home page of **Contoso Home Site** and add a link to the new CEO wiki page.

   A. Click the **Contoso Home Site** link in the **Top Link Bar** to navigate to the Home page of **Contoso Home Site**.

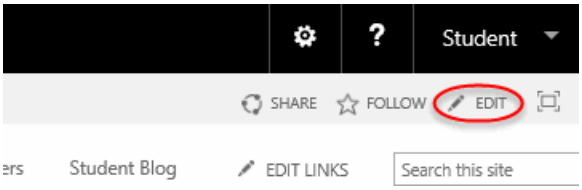


   B. Click the **REMOVE THIS** link on the home page to remove the **Get started with your site** region.

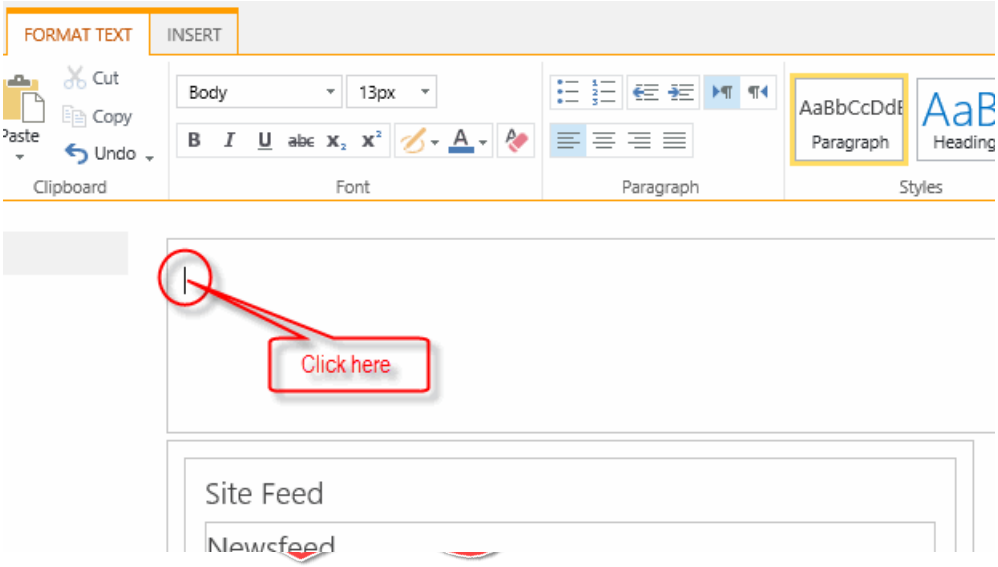


   C. Click the **OK** button on the dialog confirming you wish to remove the **Getting Started** panel.

   D. Click the **Edit** icon to switch the Home page into edit mode.



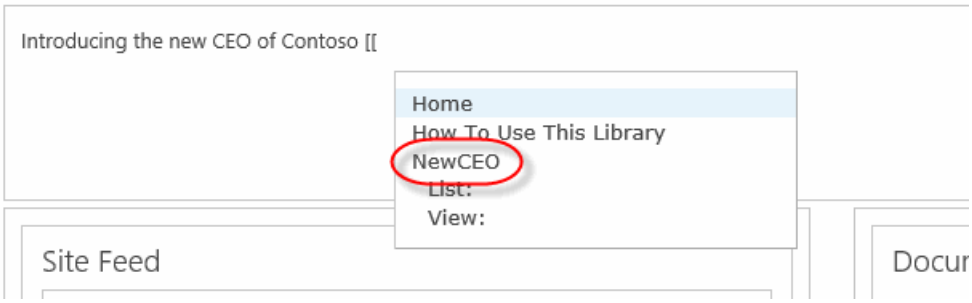
E. Click inside the Home page just below the welcome paragraph to place your insertion bar at that point.



F. Enter the following text at the insertion point:

```
Introducing the new CEO of Contoso [[
```

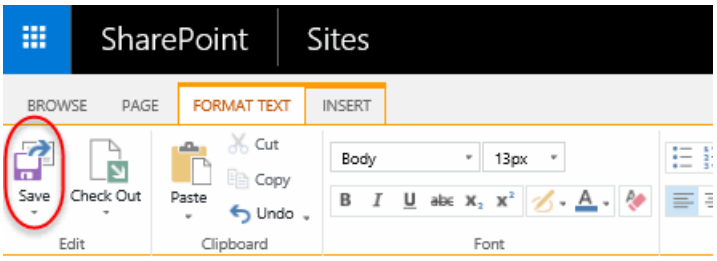
G. >After you type the second square bracket, you will get a drop-down menu of available pages to link in the **Site Pages** library.



H. Select **NewCEO** from the drop-down link choices, the two closing square brackets]] should be added automatically for you.

I. The final text should look like the following with the page in **Edit** mode.

J. Click the **Save** button on the **FORMAT TEXT** tab toolbar to save your changes.



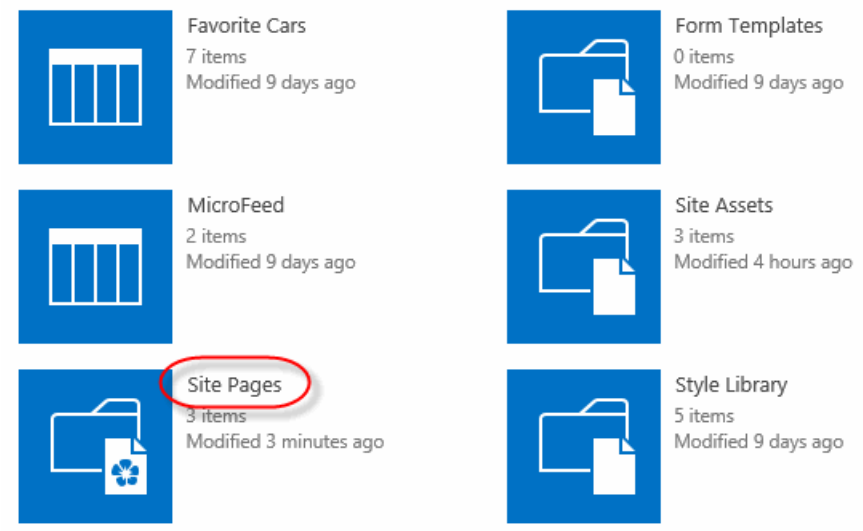
K. Note how the square bracketed text has become a link to the **NewCEO** wiki page you created earlier.

Exercise 13: Working with Web Part Pages and Web Parts

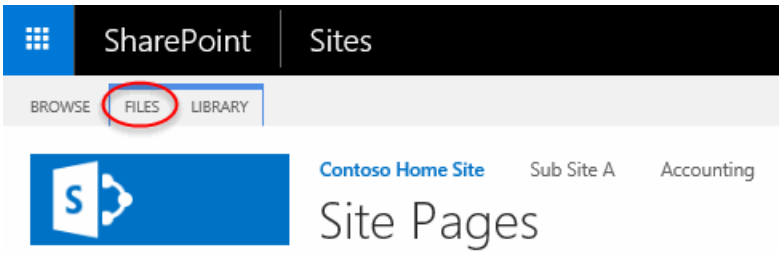
15 to 25 minutes

In this exercise, you will create a new Web Part page and add Web Parts to it.

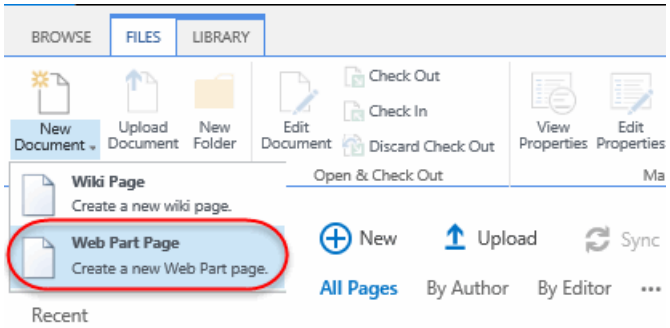
1. Create a new Web Part page.
   A. Click the **Site Contents** link in the **Quick Launch** menu.
   B. Click the **Site Pages** link on the **Site Contents** page.



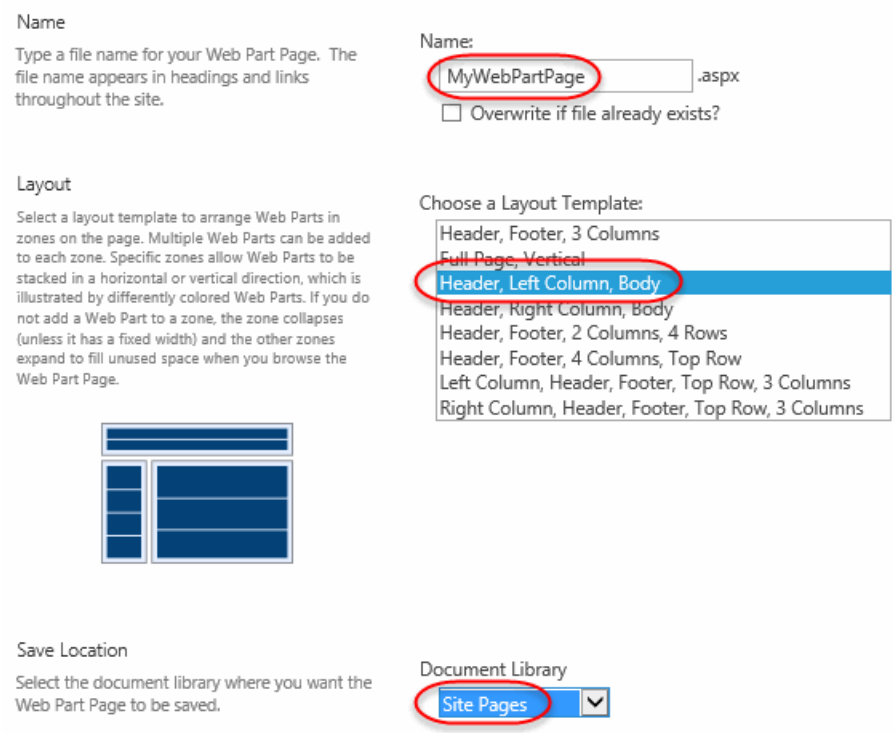
   C. Click the **FILES** tab to open the toolbar.



   D. Click the **New Document** drop-down arrow and then choose the **Web Part Page** option.

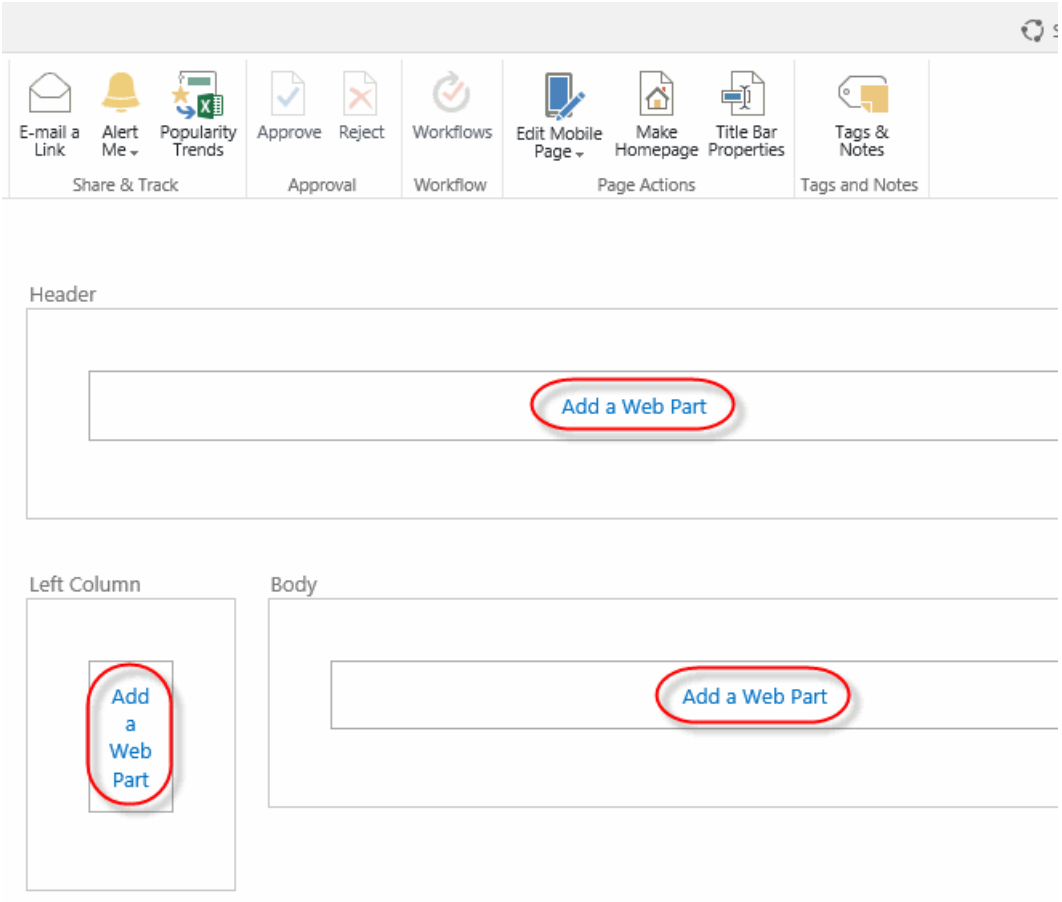


E. Type "MyWebPartPage" in the **Name** field. Take a moment to read through the different options in the **Layout** list box as well as the options in the **Save Location** combo box.



F. Select **Header, Left Column, Body** in the **Layout** list box and select **Site Pages** as the choice for the **Save Location**. Click the **Create** button to complete the process.

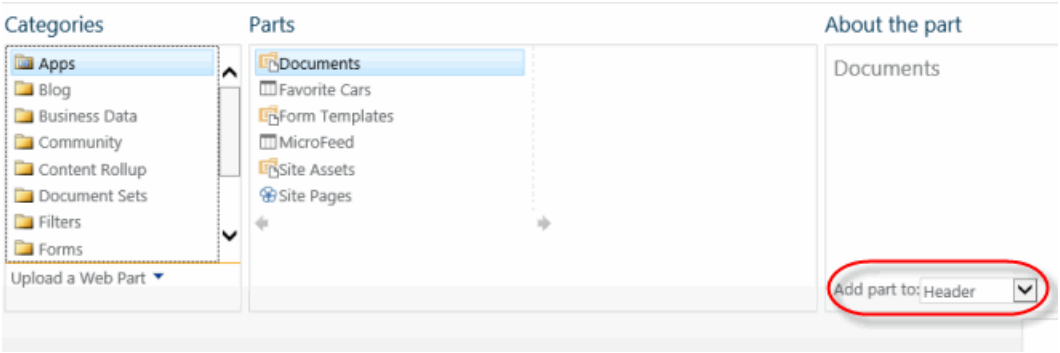
G. Your new Web Part page will look similar to the image below. Note the regions within the page that are arranged based on the layout option you chose when you created the page and inside those regions are links that allow you to add Web Parts.



2. Adding a **Content Editor** Web Part to the Web Part page and create sample content.

   A. With the **MyWebPartPage** you created in edit mode, click the **Add a Web Part** link within the **Header** region.

   B. This will open a new area below the toolbar with categorized Web Parts to choose from. Take a few moments to browse the different categories and Web Parts within those categories. Note how you can choose which region on the Web Part page the Web Part will be added to with the **Add Web part to:** drop-down field.



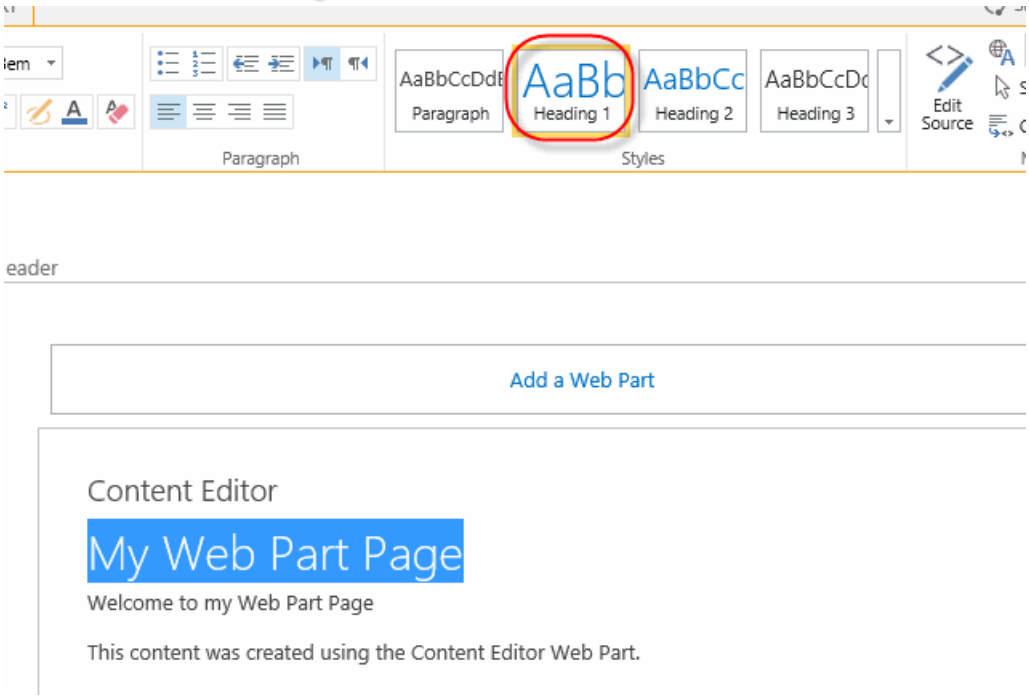
C. Select the **Media and Content** category and select the **Content Editor** Web Part. Click the **Add** button to add it to the **Header** region.

D. Click the link **Click here to add new content** inside the **Content Editor** Web Part you just added.

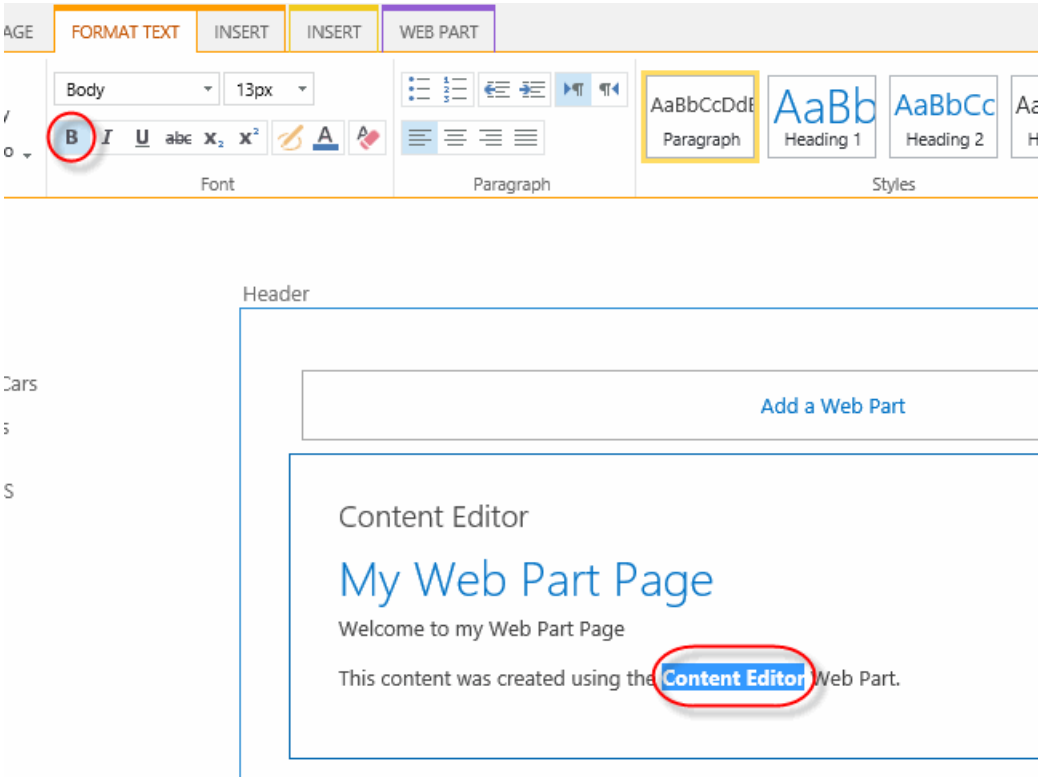
E. Type the following text inside the **Content Editor** Web Part.

```
My Web Part Page
Welcome to my Web Part page.
This content was created using the Content Editor Web Part.
```


F. Select and highlight the line "My Web Part Page" and click the **Heading 1** from the **Styles** area of the **FORMAT TEXT** tab toolbar.

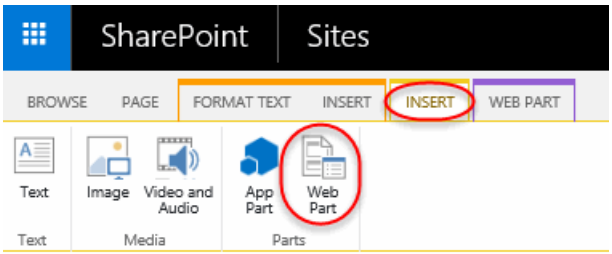


G. Select and highlight the text “Content Editor” and click the **Bold** button from the **Font** area.

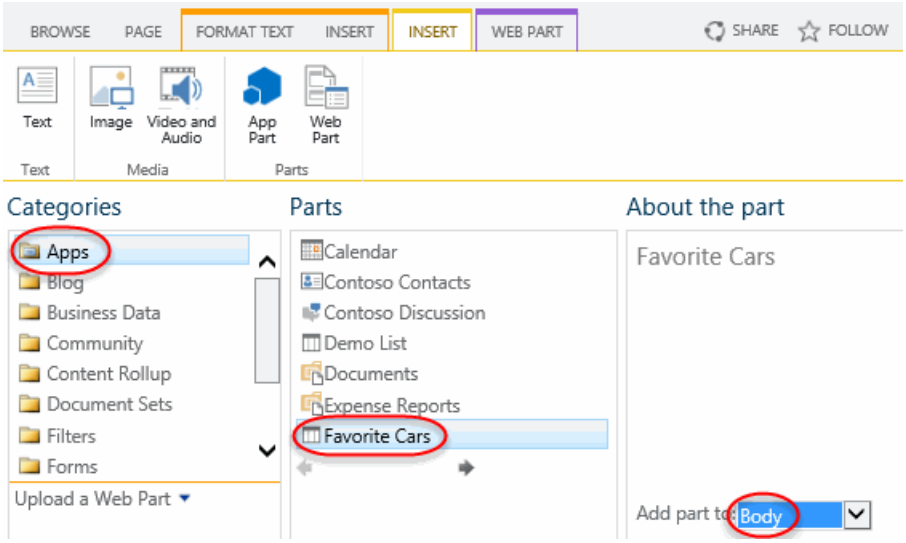


3. Add a **List View** Web Part the Web Part page.

   A. Click the **Page Tools** **Insert** tab and click the **Web Part** icon in the **Web Parts** area.

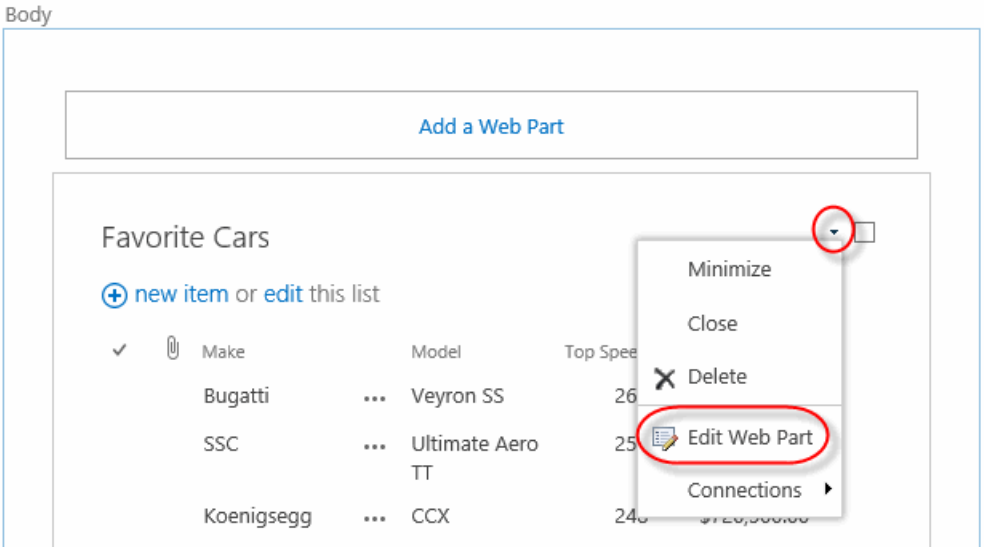


   B. Click **Apps** in the **Categories** list box, **Favorite Cars** in the **Web Parts** list box, and **Body** from the **Add Web Part to:** combo box.

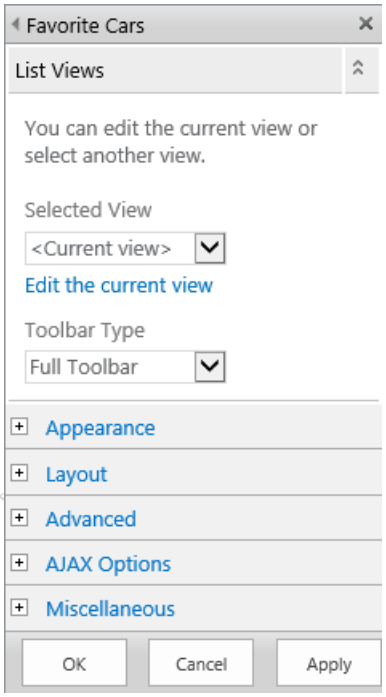


C. Click the **Add** button to insert the selected Web Part to the **Body region.**

D. Hover your mouse over the top right corner of the new **Favorite Cars List View** Web Part and click the arrow that appears and from the drop-down menu select **Edit Web Part**.

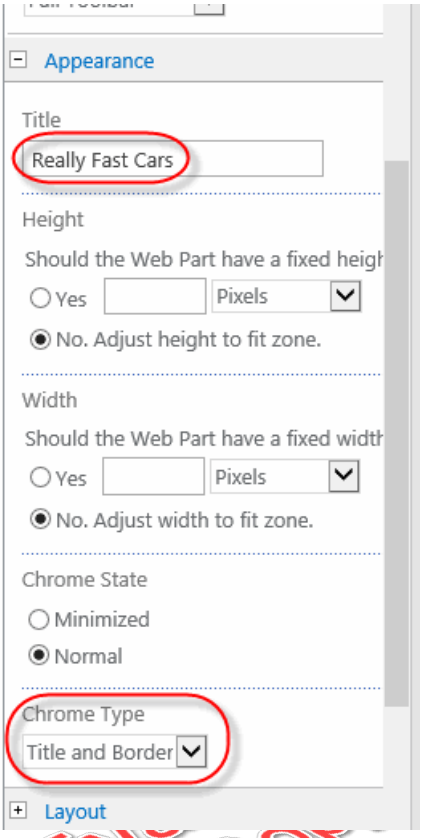


E. The previous step will open a properties control for the **Favorite Cars List View** Web Part with several expandable property regions. Take a few moments to expand and read through the various property options the Web Part offers.



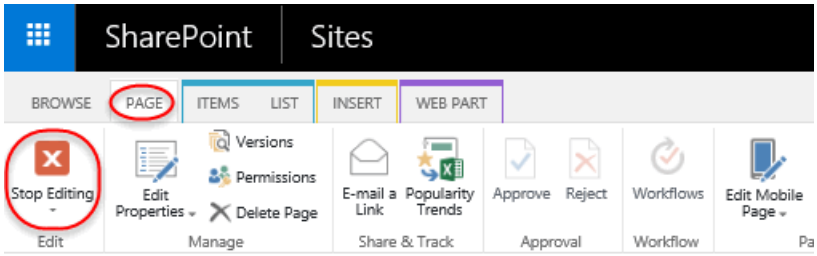
F. Expand the **Appearance** region in the **Favorite Cars List View** Web Part properties control.

G. In the **Appearance** region, replace the text in the **Title** field with “Really Fast Cars” and select **Title and Border** in the **Chrome Type** combo box.



H. Click the **OK** button at the bottom of the Web Part properties control to save your property changes.

I. Click the **Stop Editing** button on the **PAGE** tab on the page's toolbar to view the final version of the page.



Conclusion

In this lesson, you have learned:

- What wiki pages are.
- What Web Part pages and Web Parts are.
- How to add content to the Team Site Home page.
- How to change the layout of the Team Site Home page.
- How to create a Web Part page.
- How to create a wiki page library.
- How to add Web Parts.
- How to manage Web Parts.

LESSON 7
Forms Library (Optional)

Topics Covered

☑ What is a Form Library?

☑ Creating a Form Library.

☑ Using InfoPath Designer to design a basic form template.

☑ Publishing an InfoPath Designer form template to a Form Library.

☑ Designating form template fields as library columns.

☑ Creating instances of documents in a Form Library.

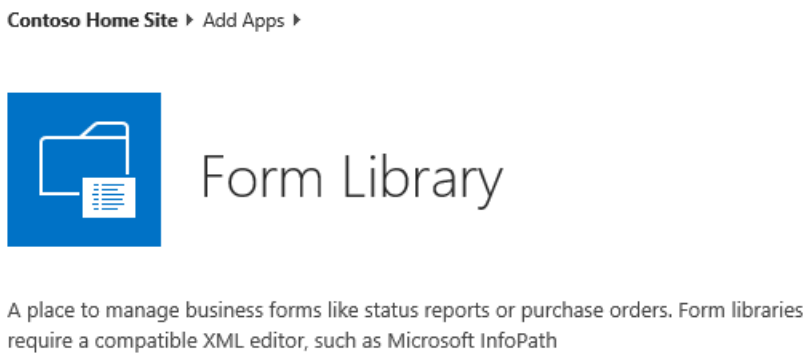
Introduction

A SharePoint Forms library is a special library designed to store Microsoft InfoPath form documents. Microsoft InfoPath comes with a designer tool for graphically creating forms with a wide assortment of fields and controls. The InfoPath Designer can then be used to publish the forms you design to SharePoint rendering them as web page templates for Forms libraries.

At the time of this writing Microsoft had stated that InfoPath would be retired. For SharePoint 2016 they left support for the tool in but there is not a 2016 version of the client tools. This means you can still use it in SharePoint 2016 but to create custom forms you use the InfoPath 2013 Designer tool. It is possible that future version of SharePoint will not support InfoPath forms at all. For this reason coverage of this chapter is optional for this course.

7.1. Creating a Forms Library

You can create a Forms Library just as easy as creating any other library in SharePoint. The following screen capture shows the **Forms Library** template:



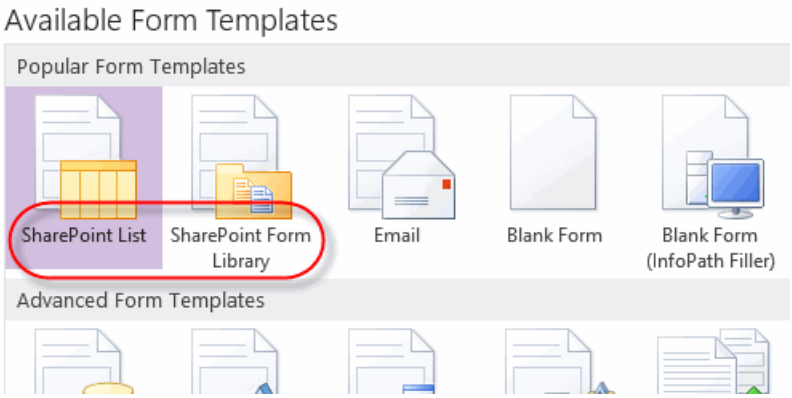
Although it is easy to create a Forms Library using the App template, if you are planning on designing forms with InfoPath Designer, it is usually simpler to create a library as part of the publishing process. One advantage of using the publishing process to create the library is you can choose which fields you want to create library columns for and which fields you only want stored in the XML body of the document item. In a later walk-through and in the lab exercises, you will see how to publish a form template and create a library at the same time.

7.2. Creating InfoPath Forms

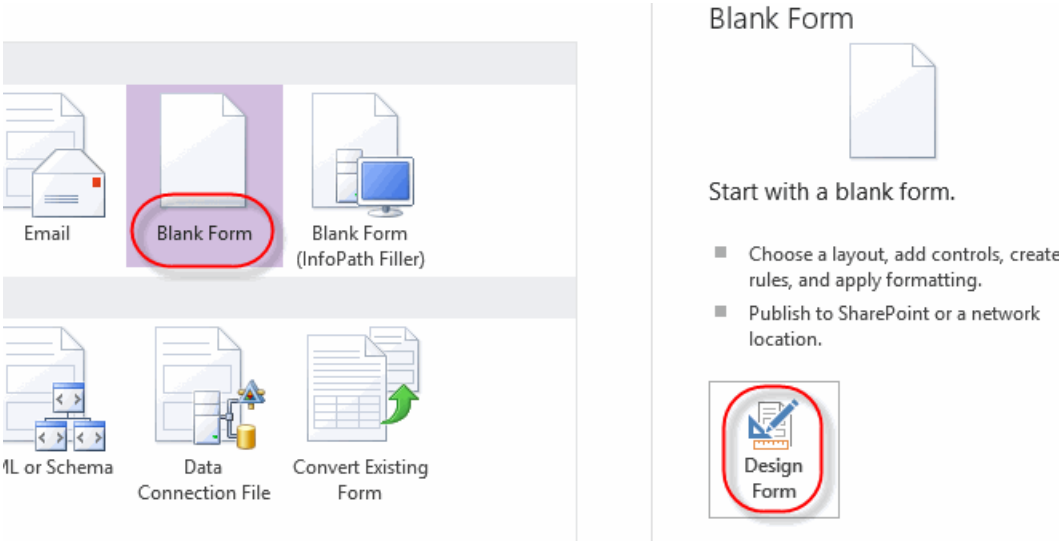
❖ 7.2.1. Create a Form with Microsoft InfoPath Designer

In this walk-through, you will learn how to create a simple form using Microsoft InfoPath Designer.

1. Launch InfoPath Designer 2013.
2. Select a template to design an InfoPath form.
   A. Note in the **Available Form Templates** page that InfoPath loads at startup there are a couple of templates designed specifically for SharePoint. Both of these templates are preformatted with labels and titles.

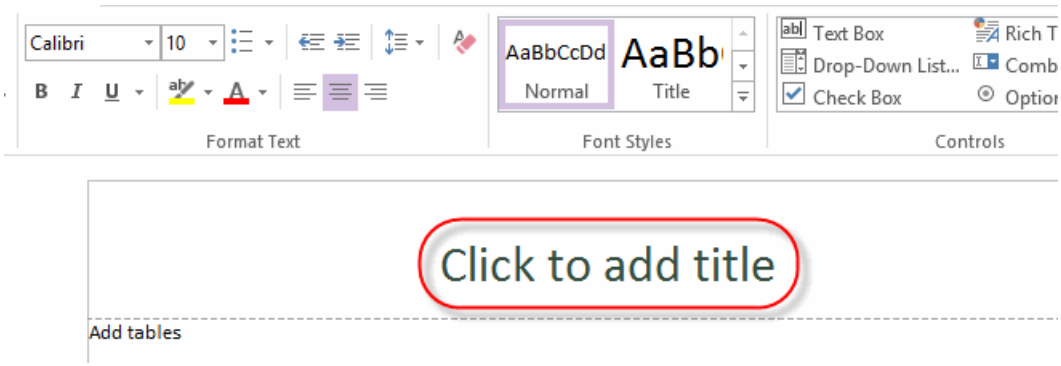


B. Select the **Blank Form** template and click the **Design Form** button to start the process.



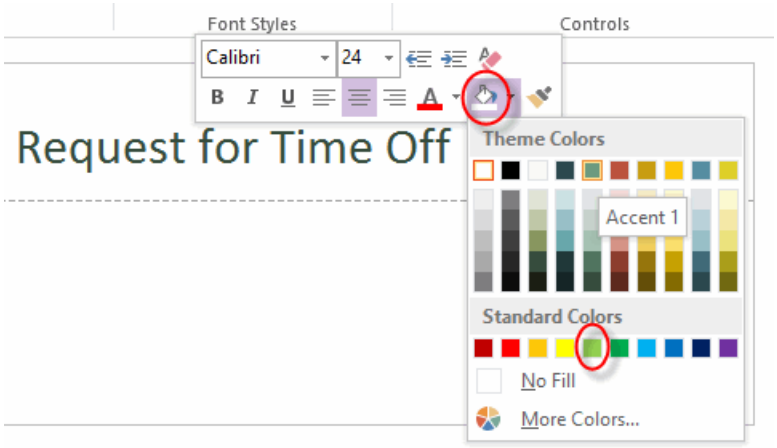
3. Add text and fields to the new blank form.

A. Click the text **Click to add title** in the form designer window.

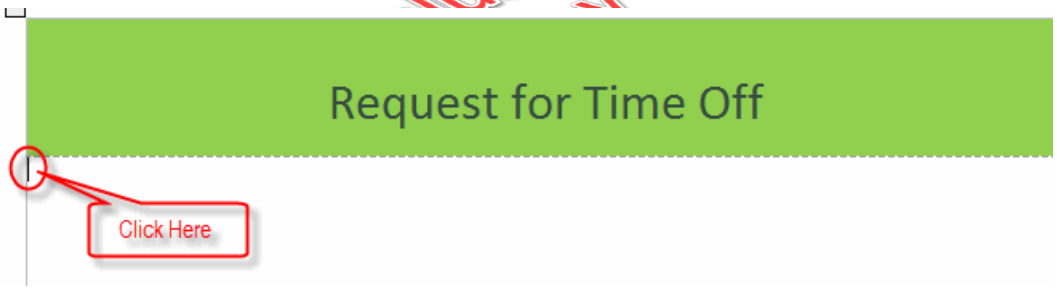


B. Type the following text in the title area: `Request for Time Off`.

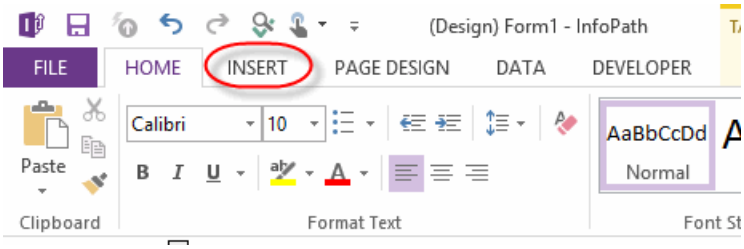
C. Right-click after the text and select the **Paint Bucket** icon drop-down, and from the drop-down select the **Light Green** color.



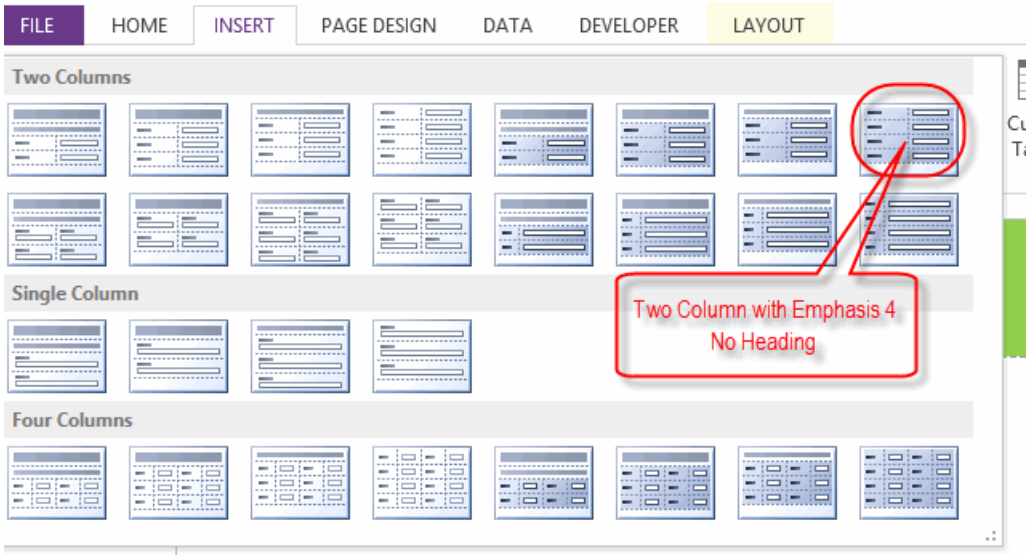
D. Click in the region below the dotted line that the title sits above to place your insertion bar in the upper-left corner.



E. Click the **Insert** tab at the top of the InfoPath Designer window.



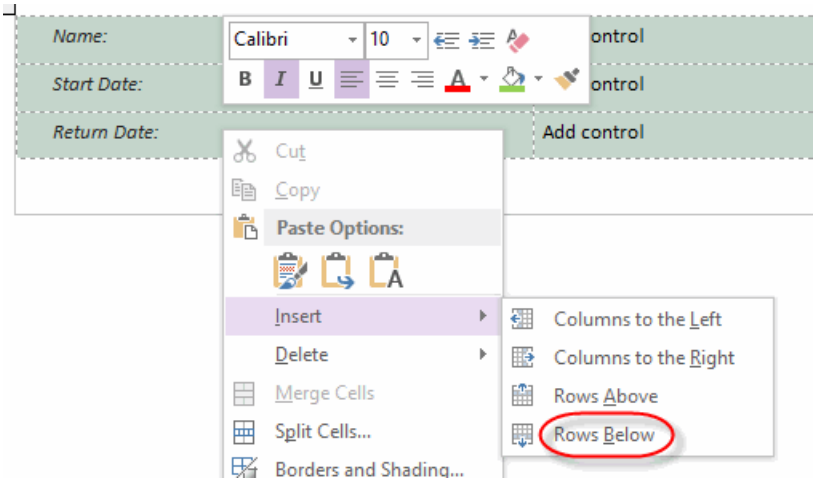
F. Click the arrow in the bottom right corner of the tables list to open it. Select the **Two Column with Emphasis 4 No Heading** option from the list.



G. Type the following text `Name:` in the top left cell of the table you just added.

H. Type `Start Date:` in the cell below "Name:" and type `Return Date:` in the cell below "Start Date:".

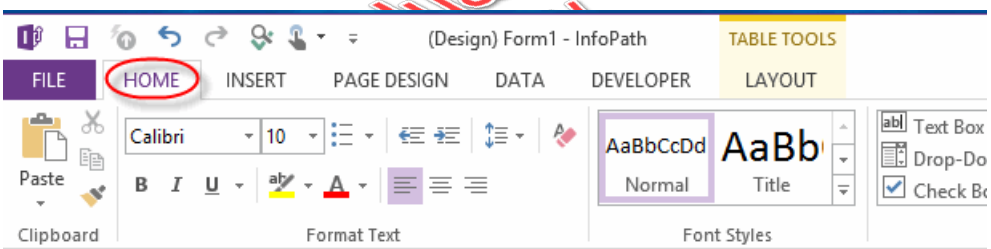
I. With your insertion point in the last row behind the "Return Date:" text, right-click and select the **Insert** option then select the **Rows Below** sub option.



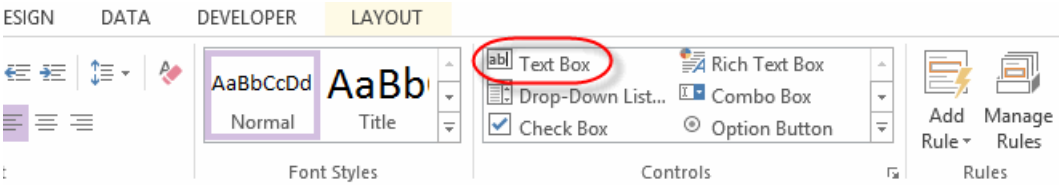
J. Click inside the left cell of the new row and type the text `Reason:`; it should be directly below "Return Date:".

K. Click inside the top right cell with the text **Add control** currently in it.

L. Click the **Home** tab to view its toolbar.

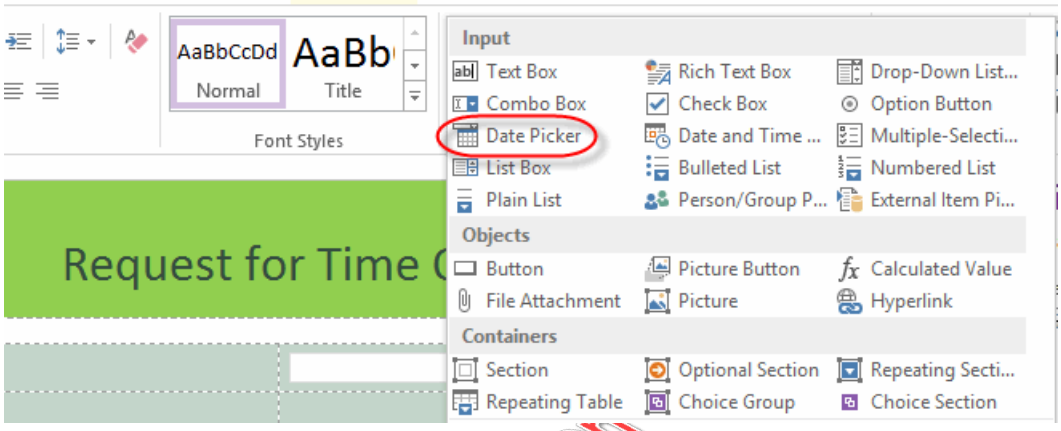


M. From the **Controls** list box in the **Home** tab, click the **Text Box** control to add it to the selected cell on the form.



N. Click inside the **Add control** cell to the right of the "Start Date:" label.

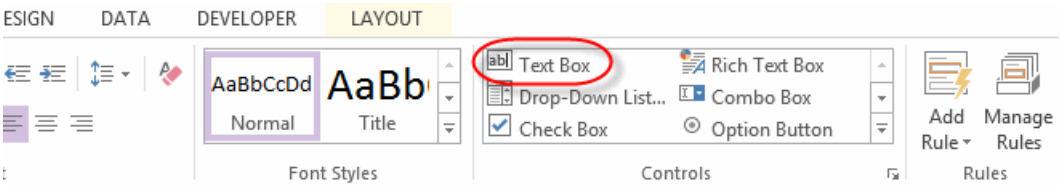
O. From the **Controls** list box in the **Home** tab, click the **Date Picker** control to add it to the selected cell on the form.



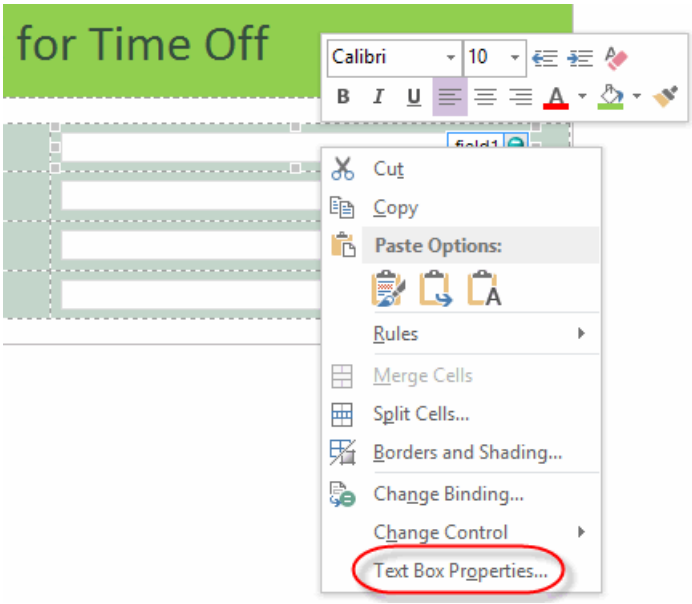
P. Repeat the previous two steps to add a **Date Picker** control in the cell next to "Return Date:".

Q. Click inside the last **Add control** cell to the right of the "Reason:" label.

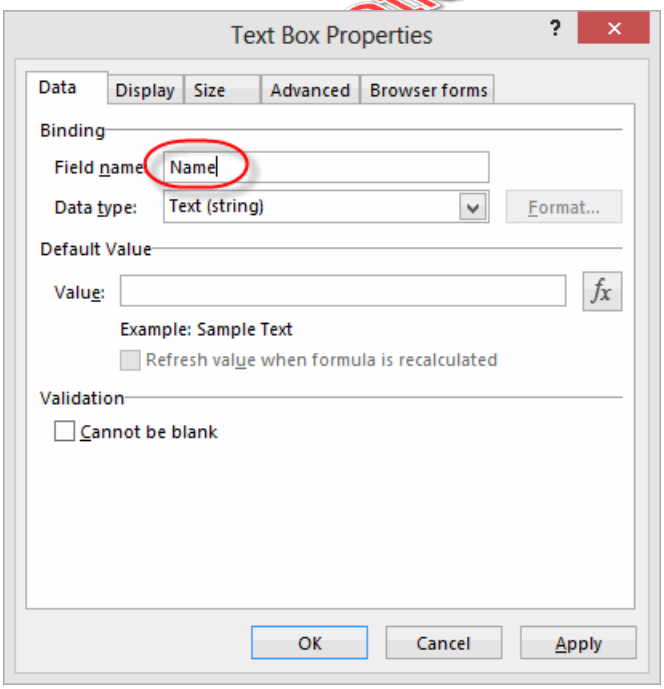
R. From the **Controls** list box in the **Home** tab, click the **Text Box** control to add it to the selected cell on the form.



S. Right-click the first text box control to the right of the "Name:" label and select the **Text Box Properties…** option from the menu.

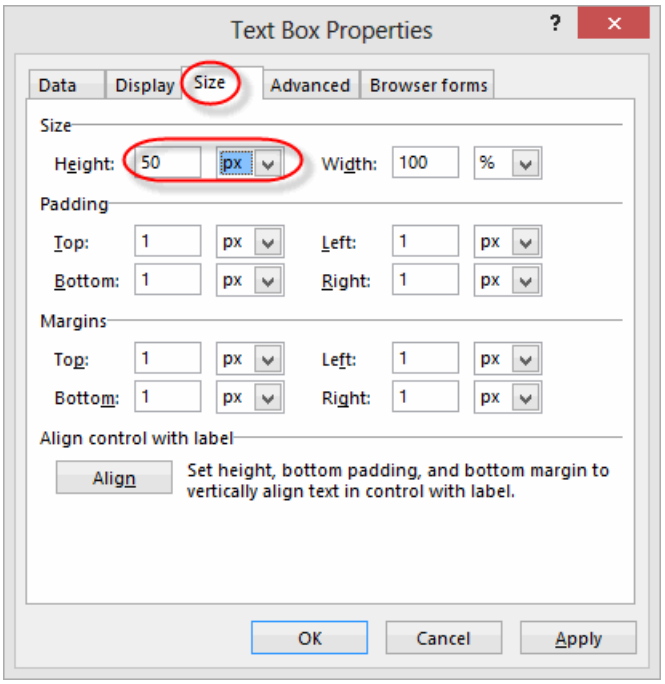


T. On the **Data** tab of the **Text Box Properties** dialog window replace "field1" with `Name` in the **Field name** field. Click the **OK** button to save the changes.



U. Repeat previous two steps to rename the Date Picker controls, "field2" and "field3", to `StartDate` and `ReturnDate`.

V. Repeat the steps for the “Reason:” text box control renaming it from “field4” to `Reason`, but in addition to the field name click the **Size** tab in the **Text Box** properties dialog window and change the **Height** property from “auto” to 50 pixels. Click the **OK** button to save the changes.



W. The final version of our form should look similar to the following image:

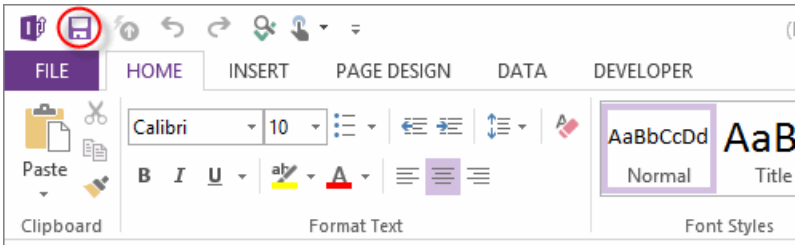
Leave InfoPath Open
Leave InfoPath open for the next walk-through that will show you how to publish the form to SharePoint.

7.3. Publishing InfoPath Forms to SharePoint

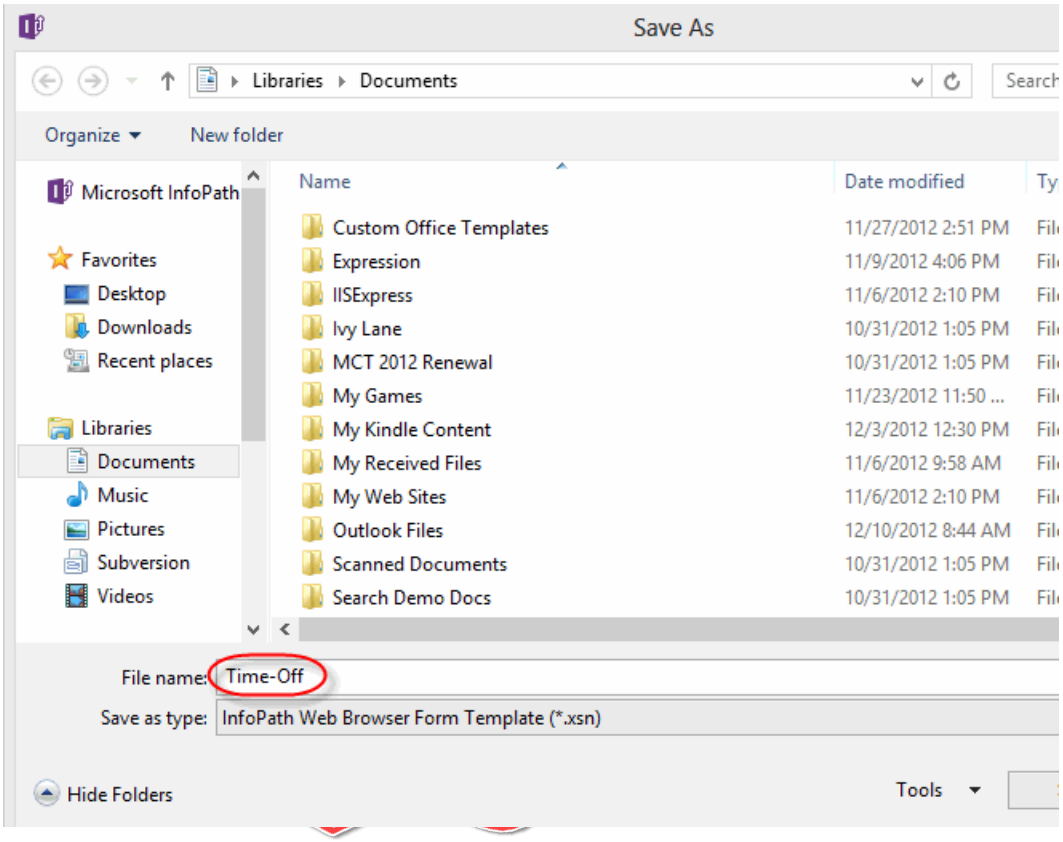
❖ 7.3.1. Publish Custom InfoPath Form

This walk-through will show you how to publish the InfoPath form created in the previous walk-through. As part of the publishing process, the walk-through will create a new **Forms** library with custom library columns. The walk-through will then test the new form by creating a new item in the library.

1. Publish the custom form using InfoPath Designer.
   A. From within InfoPath Designer, click the **Save** icon in the upper-left corner of the window above the toolbar.

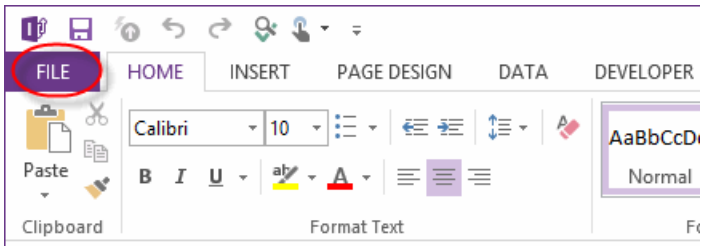


   B. In the **Save As** dialog window, keep the default location and name the file `Time-Off` leaving the **Save as type** set to **InfoPath Web Browser Form Template**. Click the **Save** button to complete the process

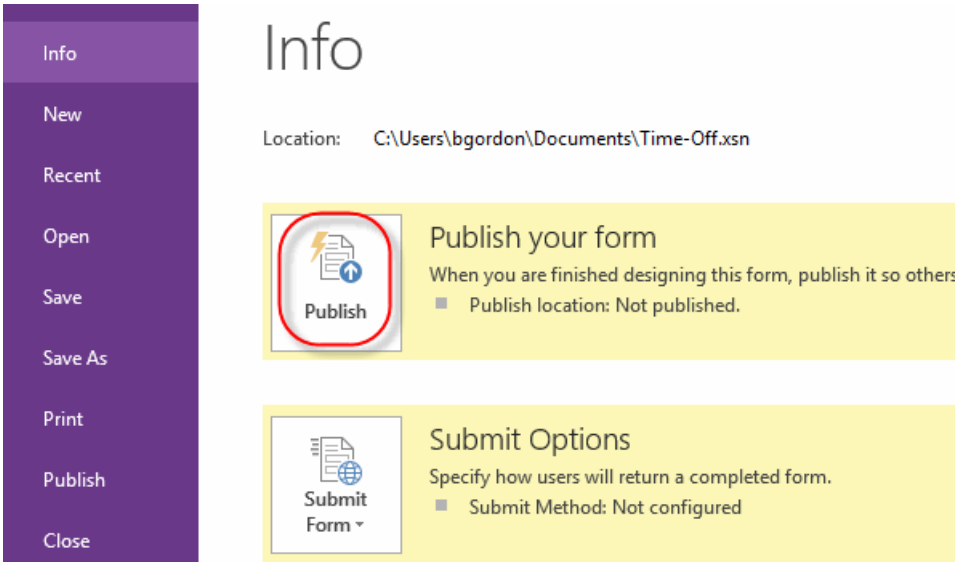


Save Before Publishing
InfoPath requires that you save the form before you can publish it.

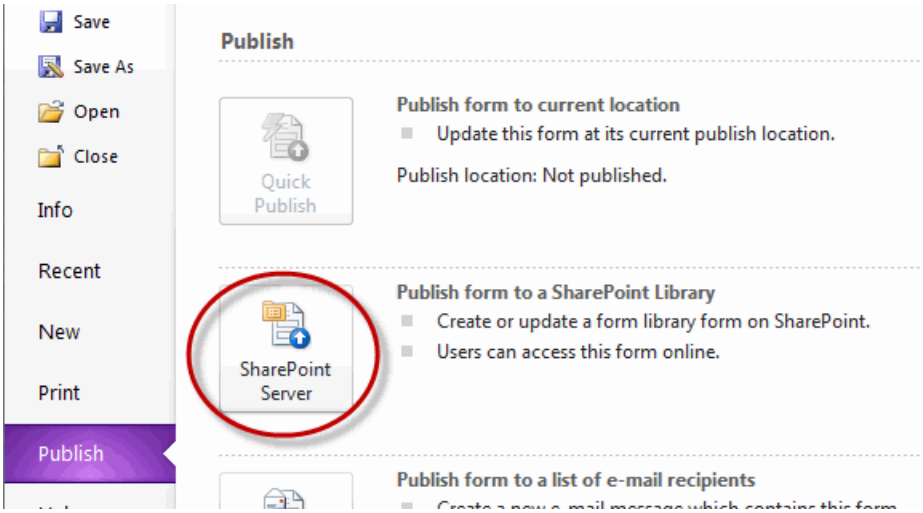
C. Click the **File** tab to get the "Backstage" view of InfoPath Designer.



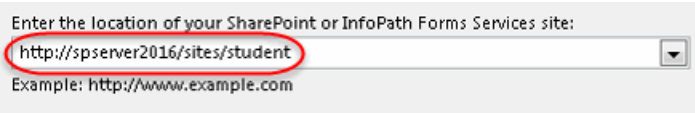
D. Click the **Publish** button on the "Backstage" view of InfoPath Designer. This will take you to the publish options tab.



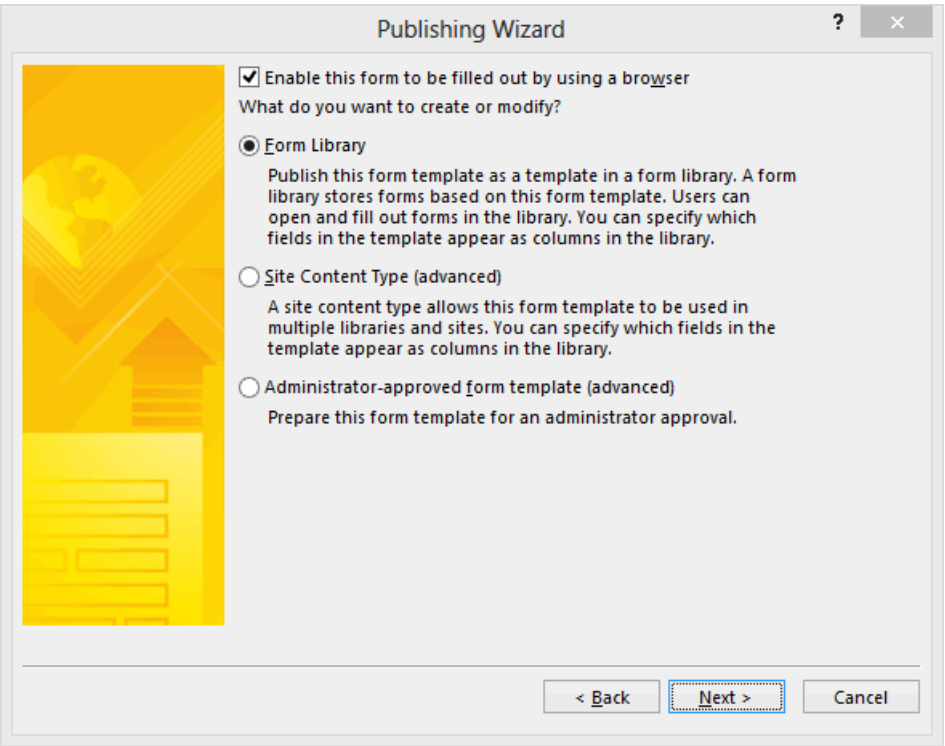
E. Click the **SharePoint Server** option on the **Publish** tab of the "Backstage" view. This will launch the **Publishing Wizard**



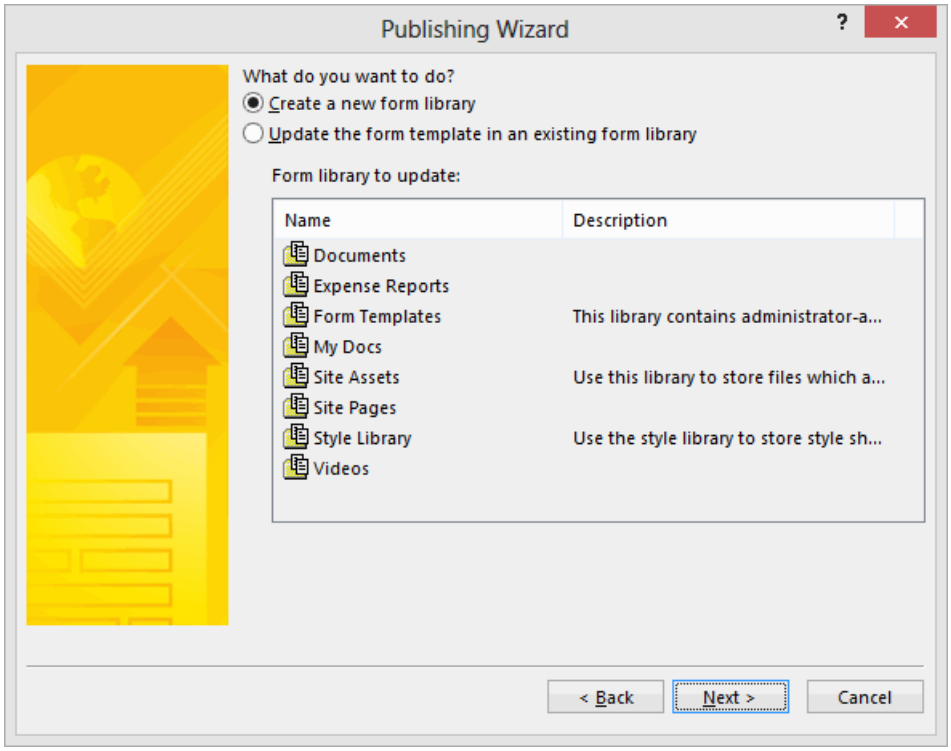
F. In the **Publishing Wizard** dialog window, enter your SharePoint site URL, `http://spserver2016/sites/student`. Click the **Next** button to continue.



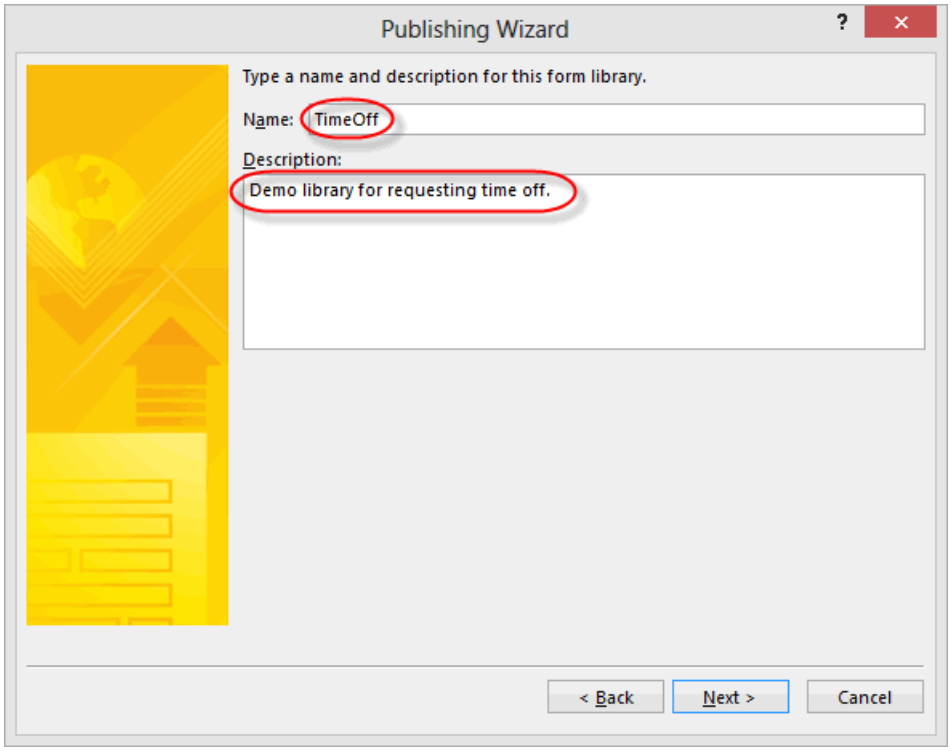
G. Leave the default values on the second page of the **Publishing Wizard**. Click the **Next** button to continue.



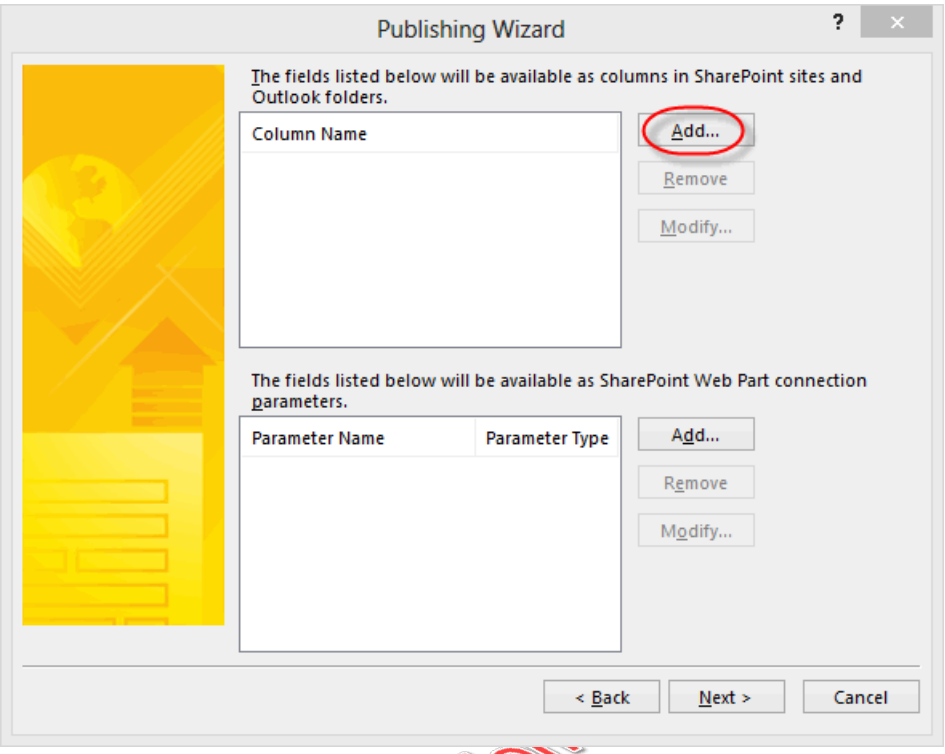
H. Leave the default value, **Create a new form library** selected on the third page of the **Publishing Wizard**. Click the **Next** button to continue.



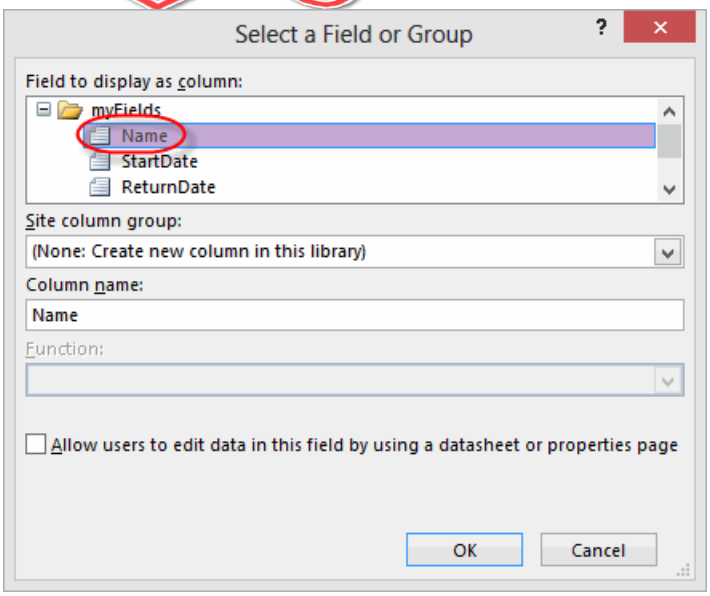
I. In the **Name** field of the **Publishing Wizard**'s fourth page enter "TimeOff". For the **Description** field enter "Demo library for requesting time off". Click the **Next** button to continue.



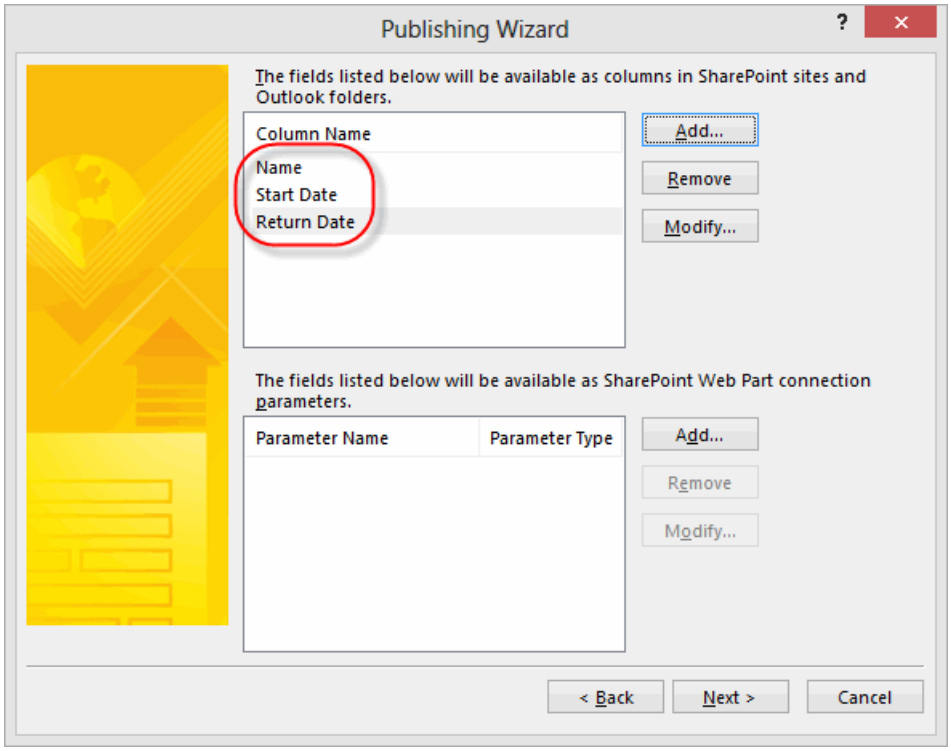
J. On the next and fifth page of the **Publishing Wizard**, click the **Add** button next to the first list box under the heading **The fields listed below will be available as columns in SharePoint sites and Outlook folders**.



K. In the **Select a Field or Group** dialog window leave the field **Name** selected with the default settings and click the **OK** button.



L. Repeat the previous two steps to add the fields **StartDate** and **ReturnDate**. The final list of columns should look like the following image. Click the **Next** button to continue.



M. Click the **Publish** button on the sixth page of the **Publishing Wizard**.

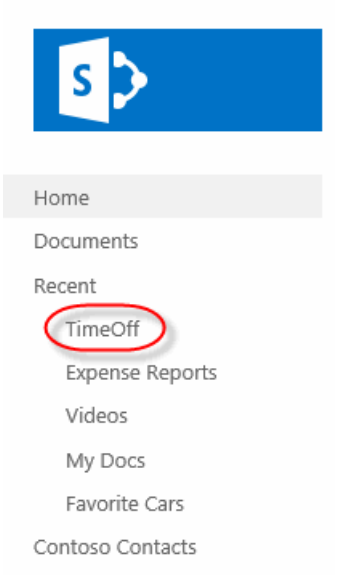
N. Click the **Close** button on the final page of the **Publishing Wizard**.

O. Close InfoPath.

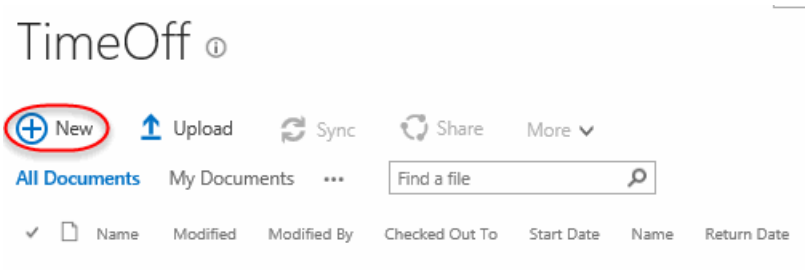
2. Test the new **TimeOff** **Forms** library and your custom form.

   A. Switch back to your browser window and select the **Contoso Home Site** link in the **Top Navigation Bar** to refresh the page and the **Quick Launch** menu so your new library **TimeOff** shows up on it.

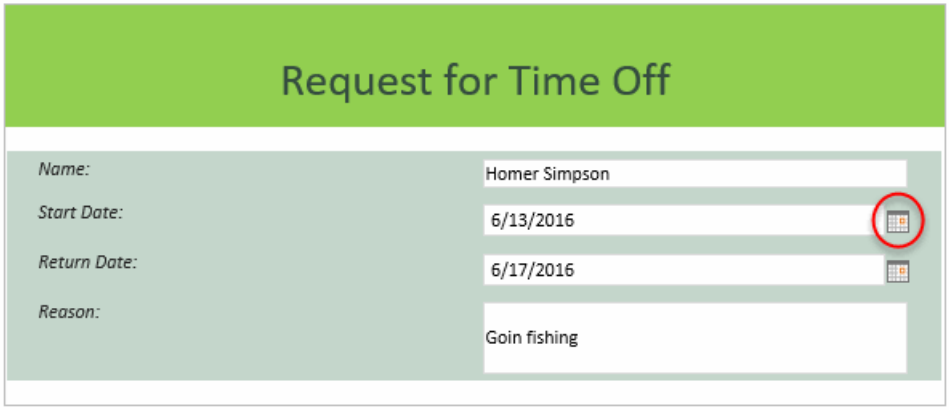
   B. Click the **TimeOff** link in the **Quick Launch** menu.



C. Click the **New** link in the **TimeOff** library to create a new item.



D. Note how your new custom form opens with the formatting and fields you created. Use the following image as a guide to filling in the form. Click the date icon to get a date picker to choose the dates from.

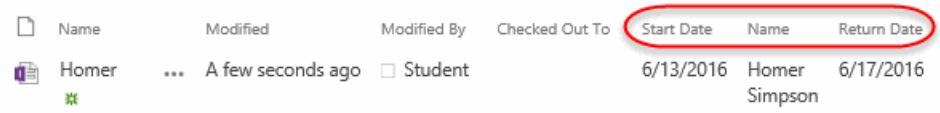


E. Click the **Save** button to save the entries to the “TimeOff” form.

F. In the **Save As** dialog, enter “Homer” for the **File name** field and click the **Save** button.

G. Click the **Close** button on the “Time Off” form to close it.

H. Note the new item in the **TimeOff** library and the columns, **Start Date**, **Return Date**, and **Name** that were created when you published the form. The “Reason” field data on the form is stored inside the InfoPath item file.



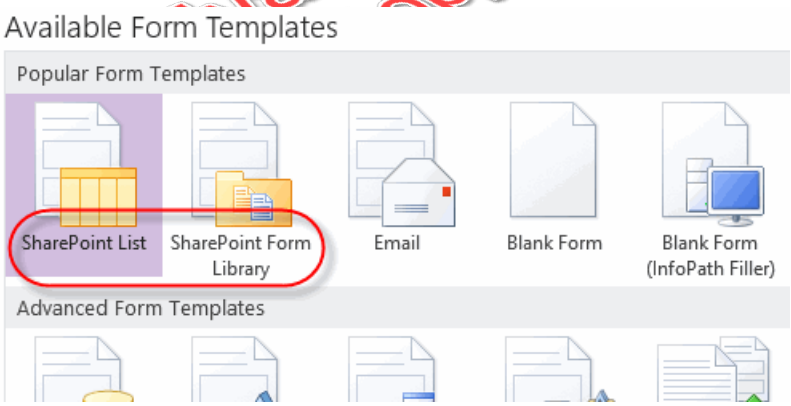
Name	Modified	Modified By	Checked Out To	Start Date	Name	Return Date
Homer	A few seconds ago	Student		6/13/2016	Homer Simpson	6/17/2016

Exercise 14: Creating and Publishing InfoPath Forms

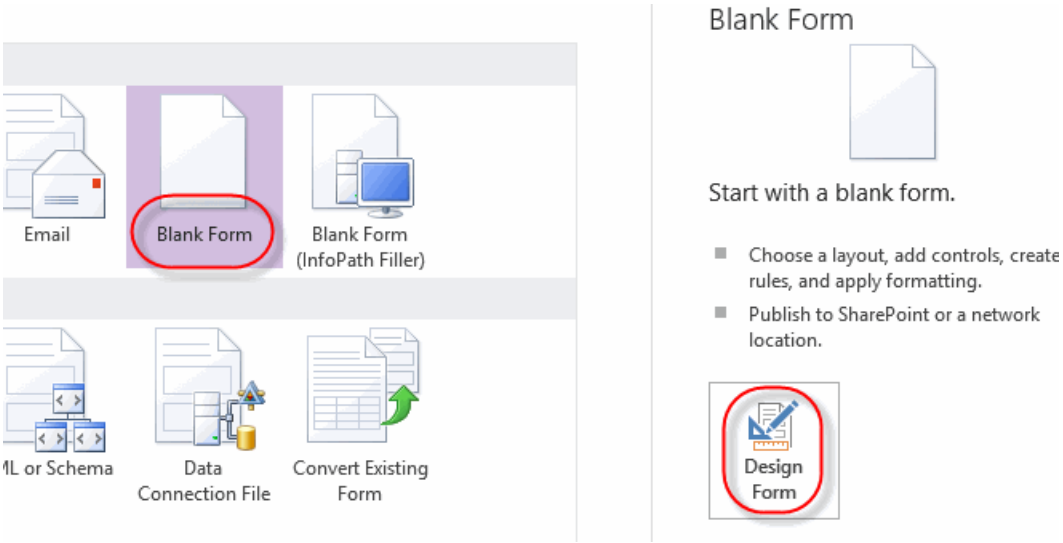
15 to 25 minutes

In this exercise, you will how to create a basic InfoPath form and publish it to a SharePoint site.

1. Launch InfoPath Designer 2013.
2. Select a template to design an InfoPath form.
   A. Note in the **Available Form Templates** page that InfoPath loads at startup that there are a couple of templates designed specifically for SharePoint. Both of these templates are preformatted with labels and titles.

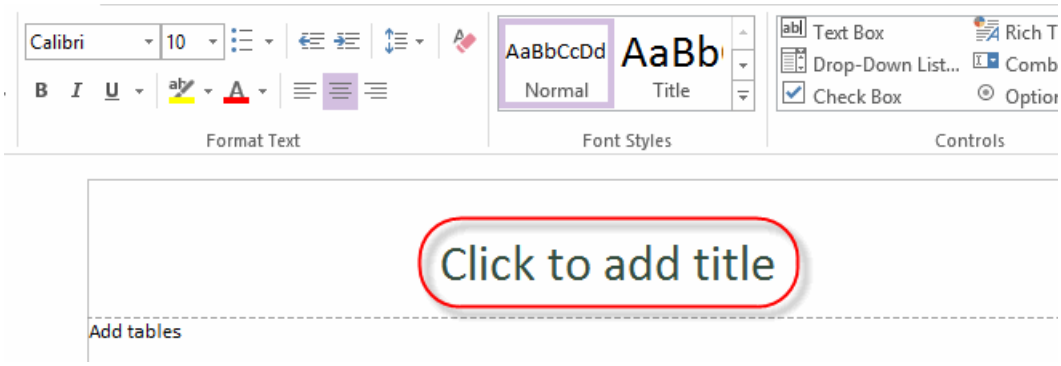


   B. Instead of using the preformatted templates, you are going to build a more basic form by selecting the **Blank Form** template and clicking the **Design Form** button to start the process.



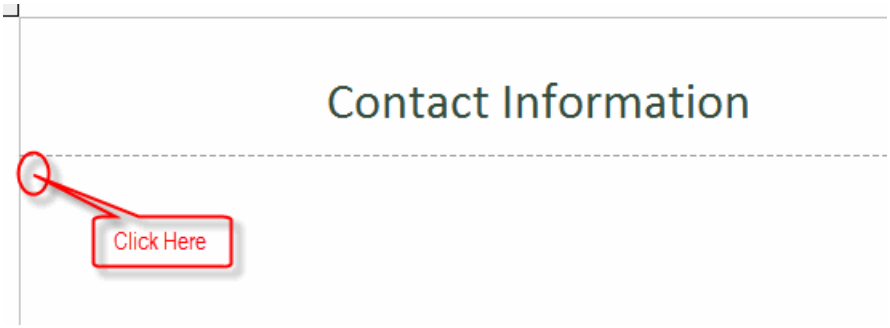
3. Add text and fields to the new blank form.

   A. Click the text **Click to add title** in the form designer window.



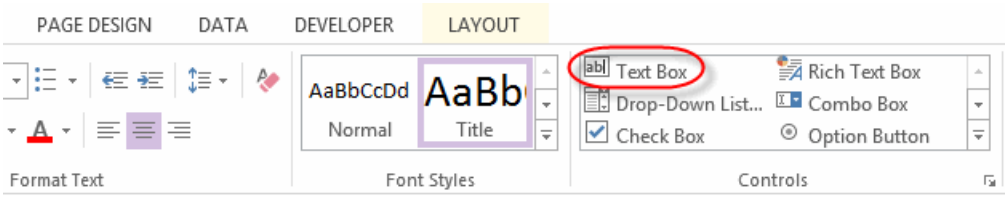
   B. Type the following text in the title area `Contact Information`.

   C. Click in the region below the dotted line that the title sits above to place your insertion bar in the upper-left corner.



D. Type the following text `First Name:`, add a space after the ":".

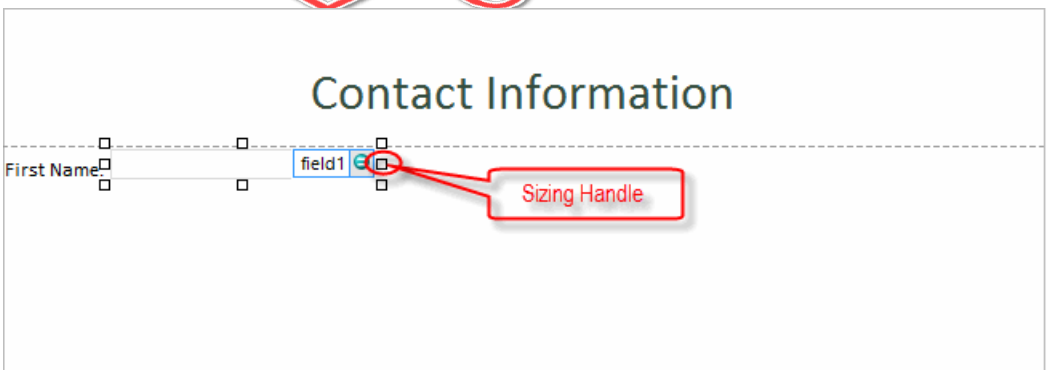
E. With your insertion point on the same line with text you just typed, click the **Text Box** control found on the toolbar inside the **Controls** list box.



Feel Free to Experiment

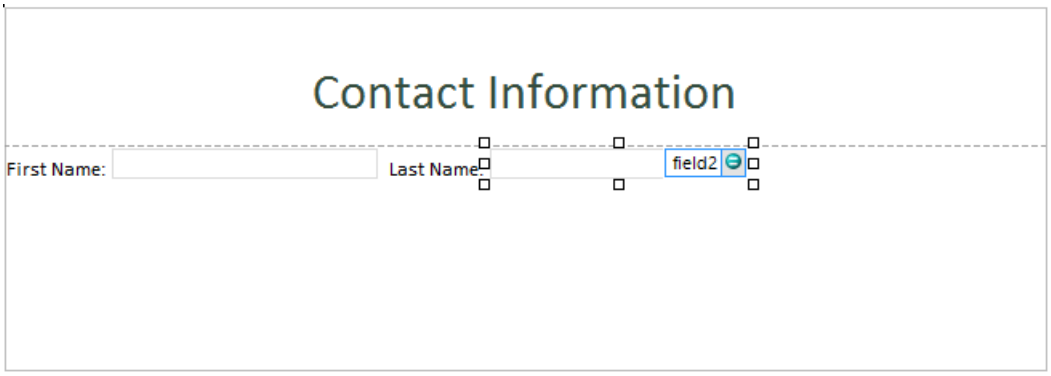
Note that there are several controls to choose from in the **Controls** list box. This example is intended to be a simple example so you are only using the **Text Box** control, but feel free to experiment on your own with other types of controls.

F. Drag the sizing handle on the right-hand side of the new text box control that you just added until it looks similar to the following image.



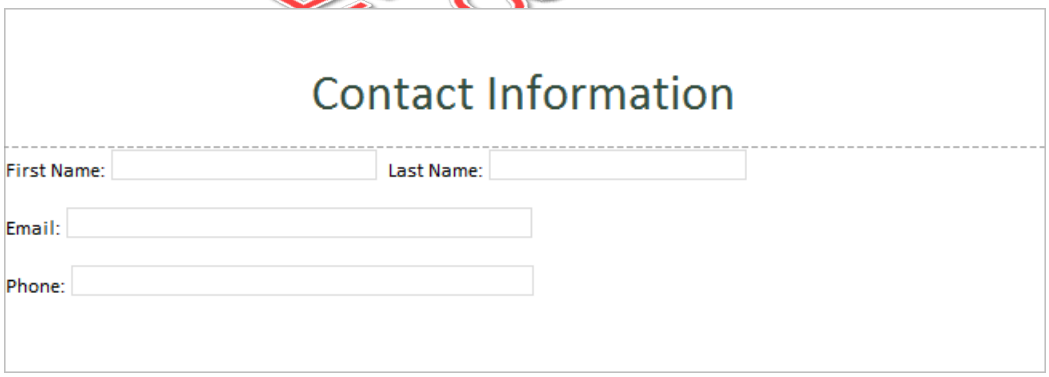
G. Click just to the right of the text box control that you just resized to place the insertion point. Type a couple of spaces and then type the following text `Last Name:`, adding a space after the ":".

H. Click the **Text Box** control from the **Controls** area of the toolbar to add another text box control behind the "Last Name:" text you just entered. Resize the new text box control until your form looks similar to the following image.



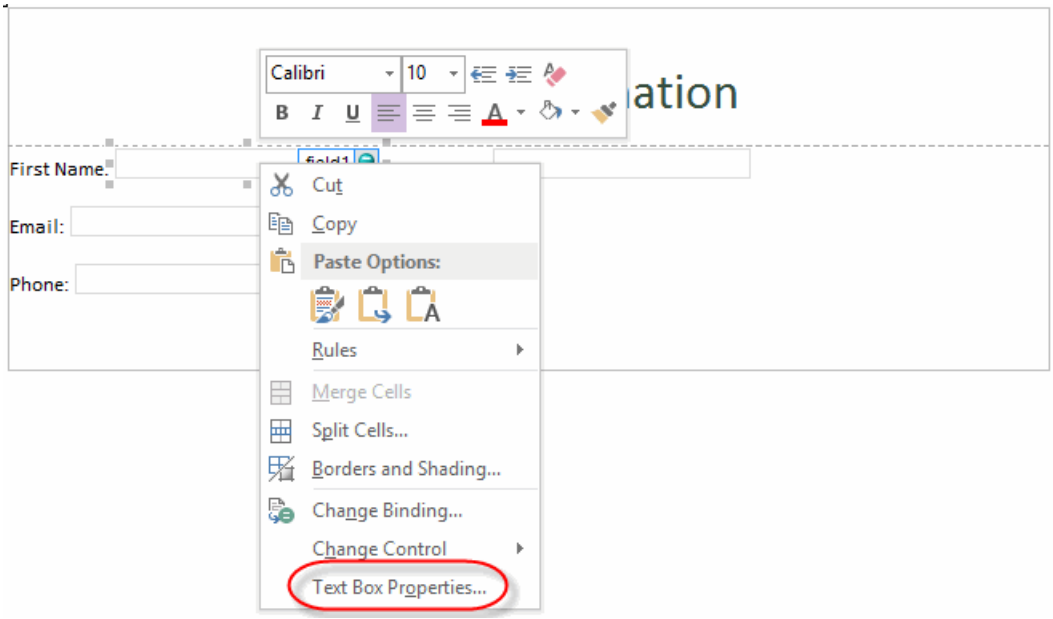
I. Click behind the second text box control to place your insertion point and press your **Enter** key twice to move your insertion point to a new line and add space to line above it.

J. Follow the previous steps to add text and a text box control for “Email” and “Phone”, each on a separate line. Use the following image as a guide to what your form should look like at this point.

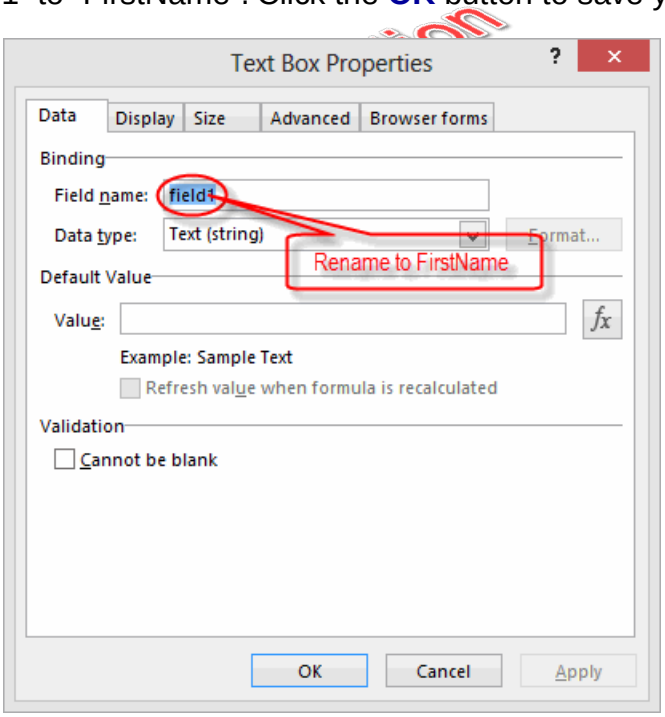


4. Edit the properties of the **Text Box** controls.

   A. Right-click the **First Name Text Box** control and select **Text Box Properties…** from the context menu.



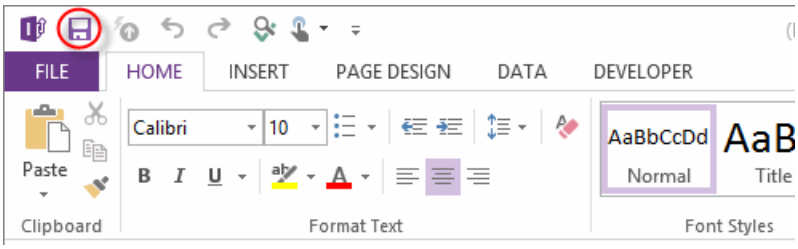
B. In the **Text Box Properties** dialog window, rename the **Field name:** from "field1" to "FirstName". Click the **OK** button to save your changes.



C. Repeat the previous step with each field renaming "field2" to "LastName", "field3" to "Email" and "field4" to "Phone".

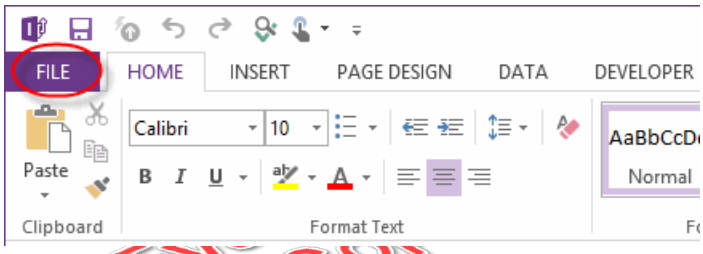
5. Publish the new form to SharePoint.

A. Click the **Save** icon in the upper-left corner of the InfoPath window.

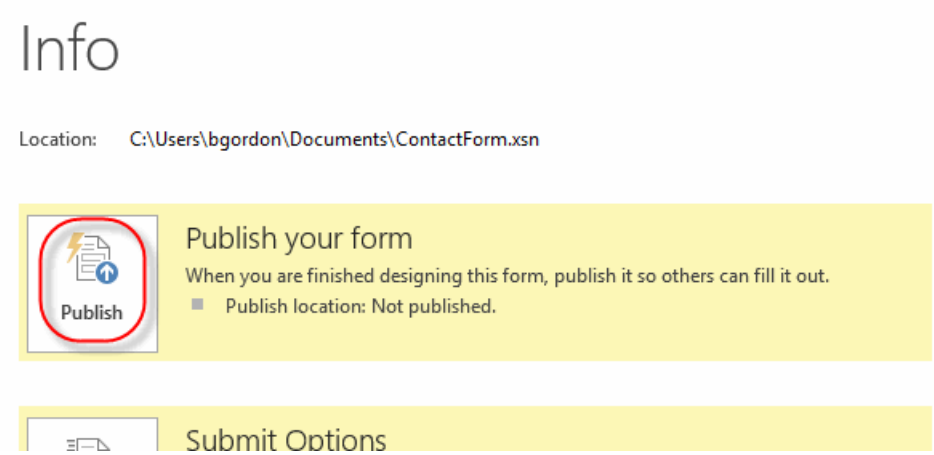


B. In the **Save As** dialog window, name the file `ContactForm.xsn` and save it somewhere on your computer.

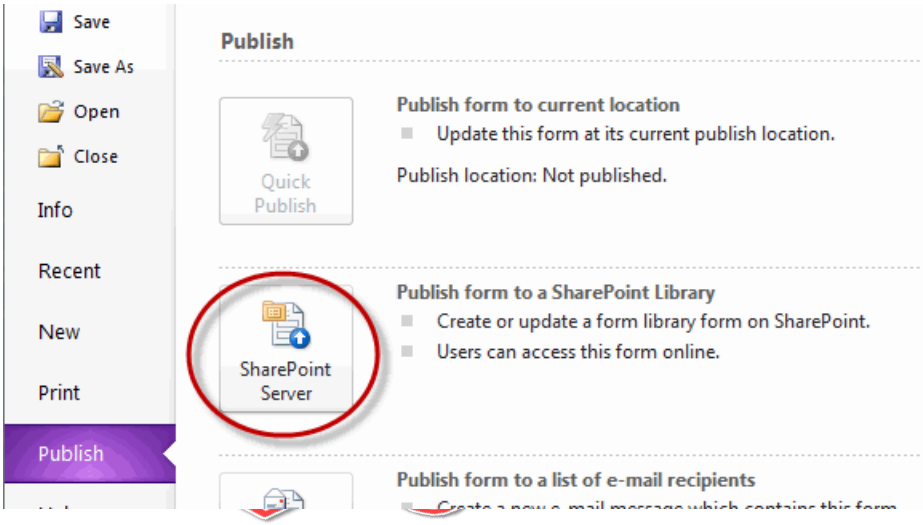
C. Click the **File** tab at the top of the InfoPath Designer window.



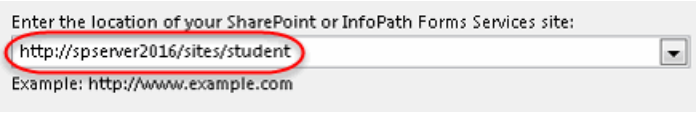
D. Click the **Publish** button on the **Info** page.



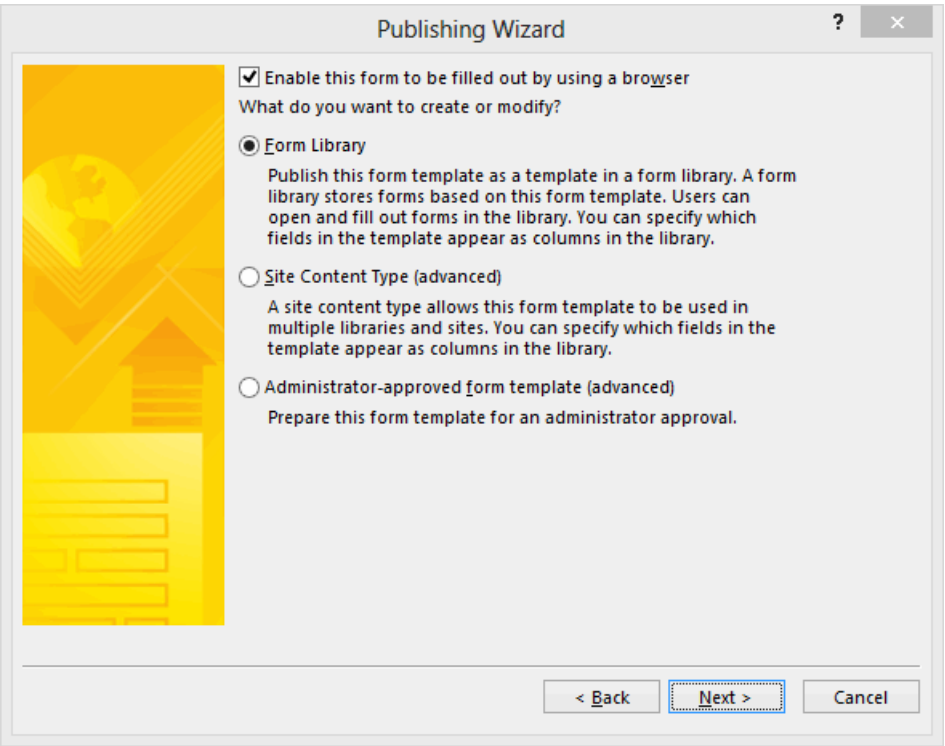
E. Click the **SharePoint Server** button on the **Publish** page to start the process of publishing to SharePoint.



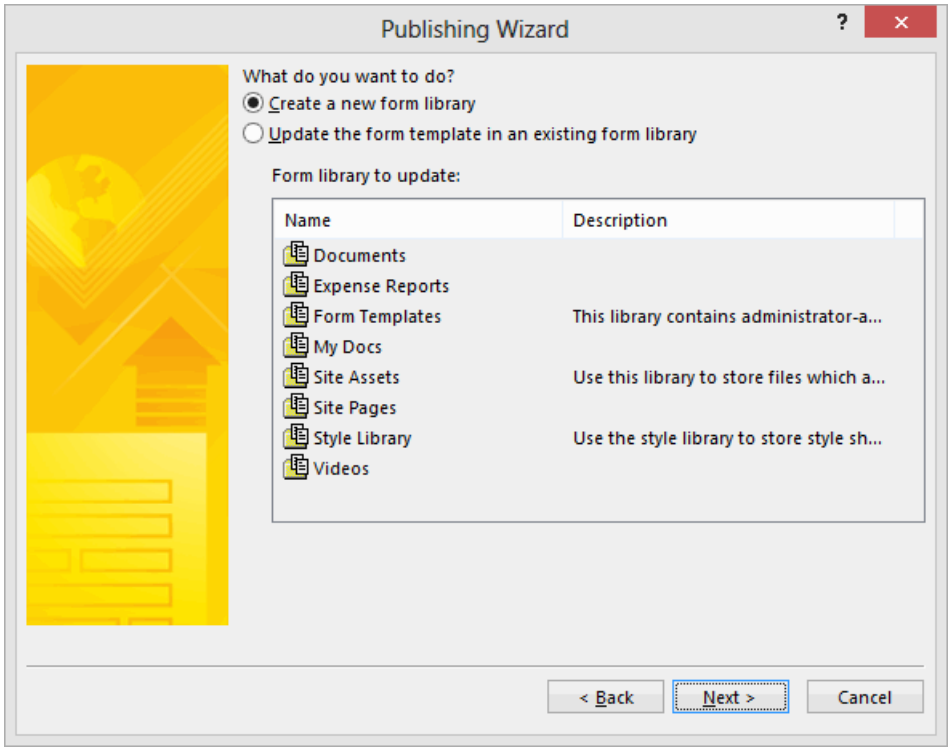
F. In the **Publishing Wizard** dialog window, enter your SharePoint site URL, `http://spserver2016/sites/student`. Click the **Next** button to continue.



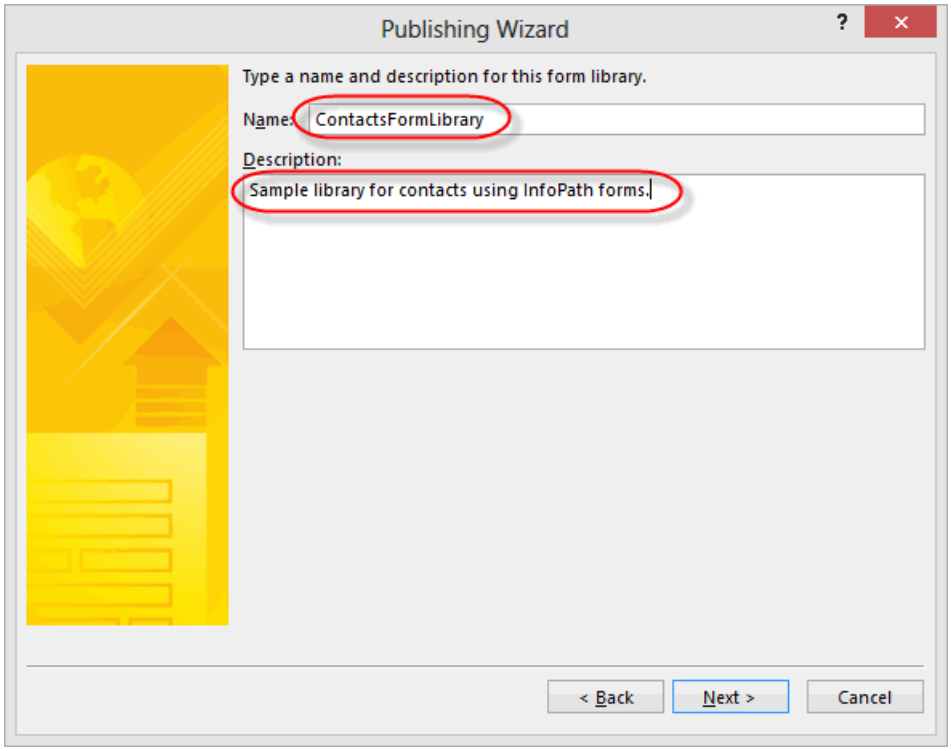
G. Leave the default values on the second page of the **Publishing Wizard**. Click the **Next** button to continue.



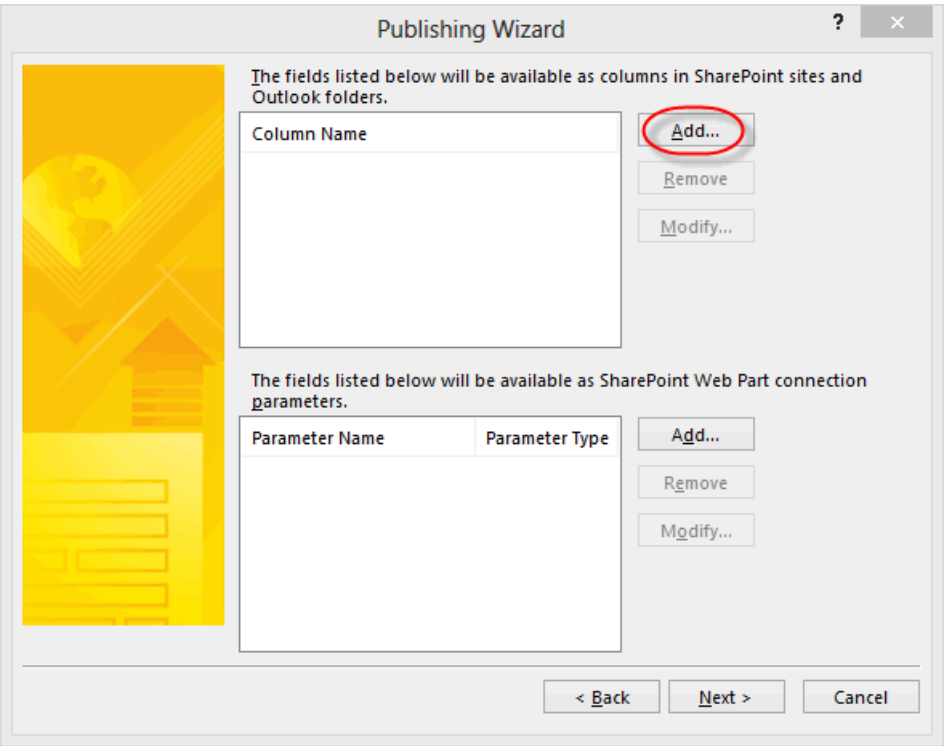
H. Leave the default value, **Create a new form library** selected on the third page of the **Publishing Wizard**. Click the **Next** button to continue.



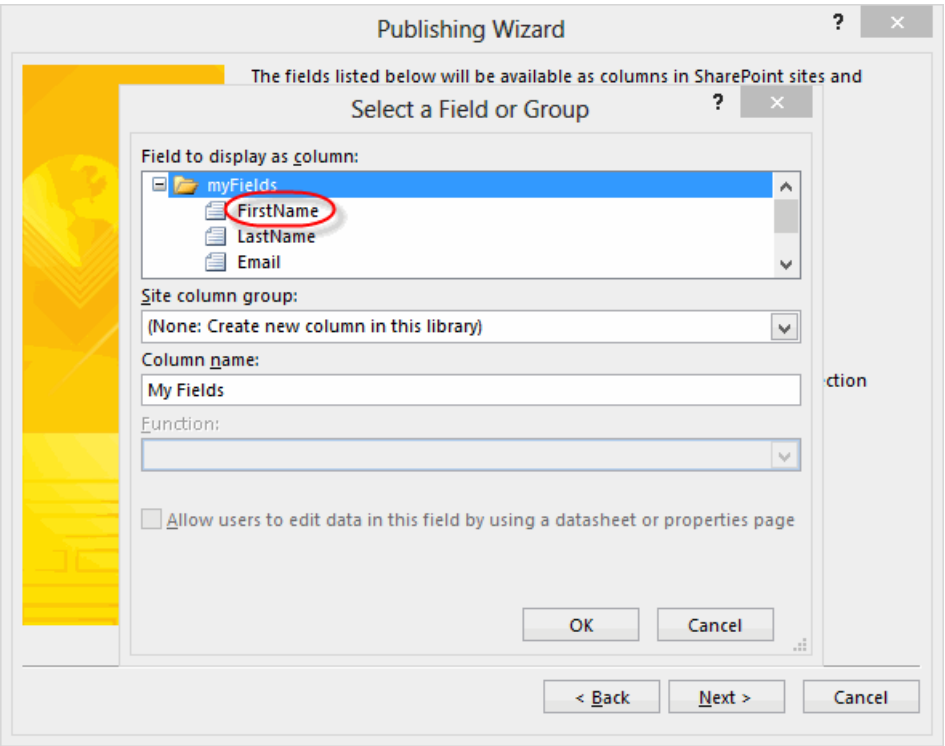
I. In the **Name** field of the **Publishing Wizard**'s fourth page enter "ContactFormLibrary". For the **Description** field enter "Sample library for contacts using InfoPath forms". Click the **Next** button to continue.



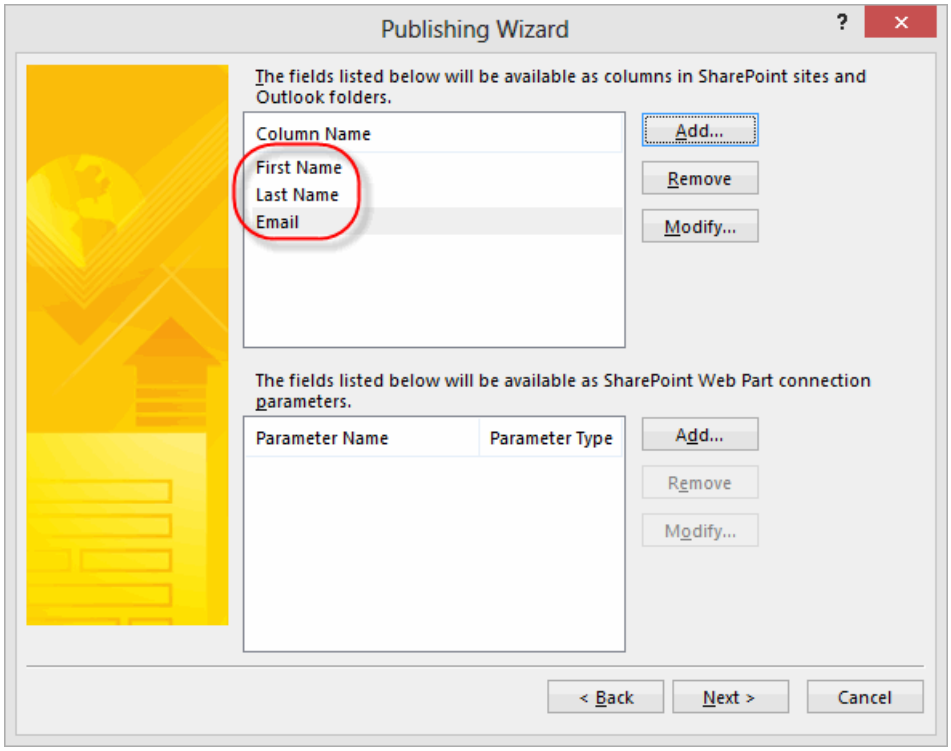
J. On the next and fifth page of the **Publishing Wizard** click the **Add** button next to the first list box under the heading **The fields listed below will be available as columns in SharePoint sites and Outlook folders**.



K. In the **Select a Field or Group** dialog window, leave the field **FirstName** selected with the default settings and click the **OK** button.



L. Repeat the previous two steps to add the fields **LastName** and **Email**. The final list of columns should look like the following image. Click the **Next** button to continue.



M. Click the **Publish** button on the sixth page of the **Publishing Wizard**.

N. Click the **Close** button on the final page of the **Publishing Wizard**.

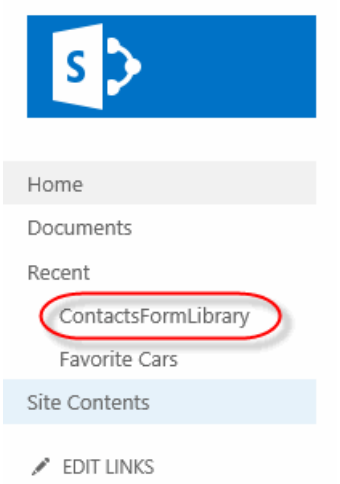
6. Close Microsoft InfoPath Designer.

7. Add a new InfoPath document to the library created by Microsoft InfoPath Designer.

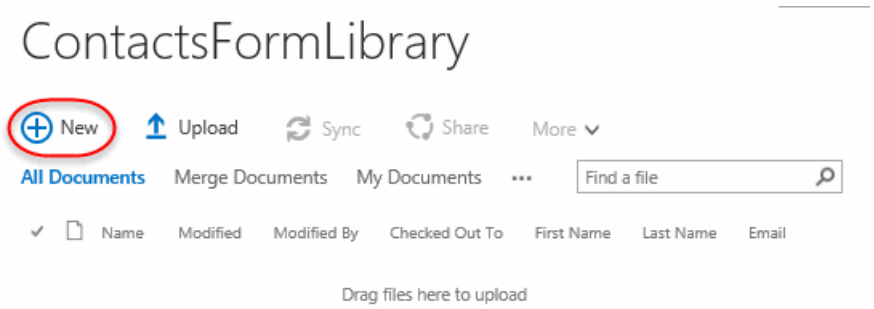
   A. Go back to your browser window or open a new one if it is not already open.

   B. Navigate to the site you published the InfoPath form in.

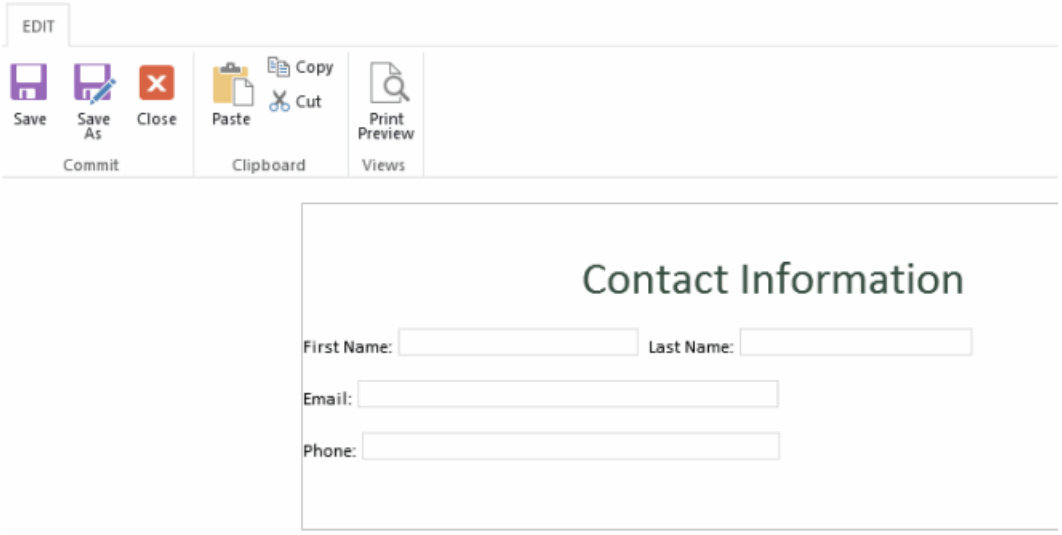
   C. Click the new **ContactsFormLibrary** link in the site's **Quick Launch** menu.



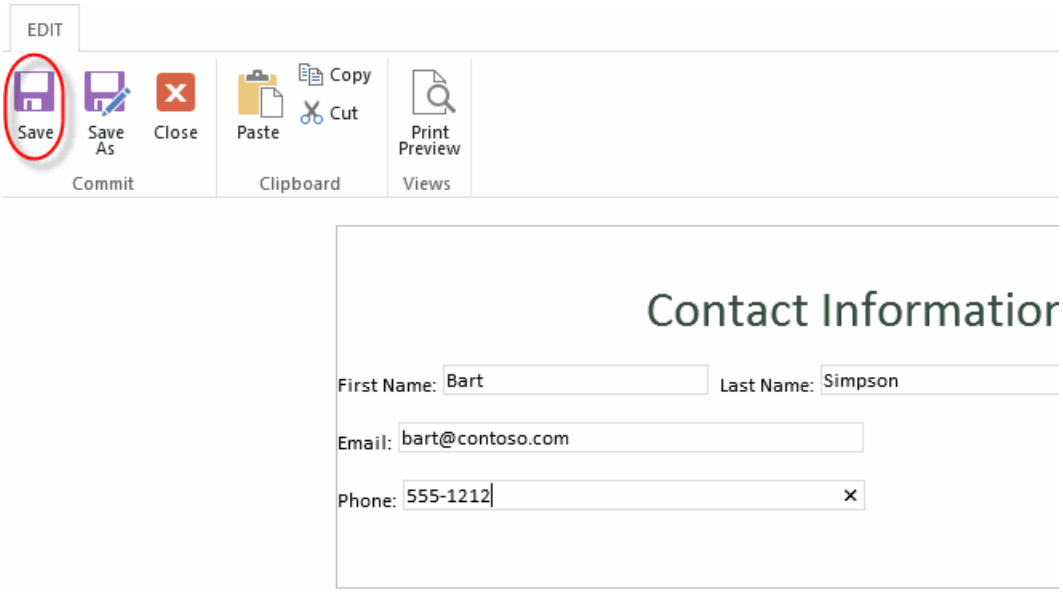
D. Click the **New** link to add a new entry into the library.



E. Note that the form that opens in your browser has the fields and layout you defined in InfoPath Designer.



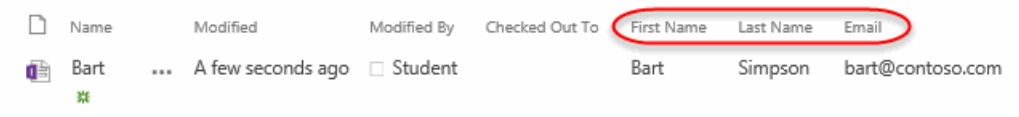
F. Enter some data into the fields, for example: “Bart” for the **First Name**, “Simpson” for the **Last Name**, “bart@contoso.com” for the **Email** and “555-1212” for the **Phone**. Click the **Save** button when you are done filling in the fields.



G. In the **Save As** dialog form, enter “Bart” for the **File Name** field. Click the **Save** button to complete the process.

H. Click the **Close** button to close the **Contact Information** form.

I. Note that the new document named “Bart” has the three columns, **First Name**, **Last Name**, and **Email** in the library view because you selected to add those fields as columns when you published the form. The **Phone** was not selected to be a column in the library but the data is stored inside the document item.



Conclusion

In this lesson, you have learned:

- What a Form Library is.

- How to create a Form Library.
- How to use InfoPath Designer to design a basic form template.
- How to publish an InfoPath Designer form template to a Form Library.
- How to designate form template fields as library columns.
- How to create instances of documents in a Form Library.

LESSON 8
Site Columns and Content Types

Topics Covered

☑ Creating Site Columns.

☑ Creating Content Types.

☑ Creating a document template for a Content Type.

☑ Assigning a Content Type to a list or library.

☑ Creating new items based on a custom Content Type.

Introduction

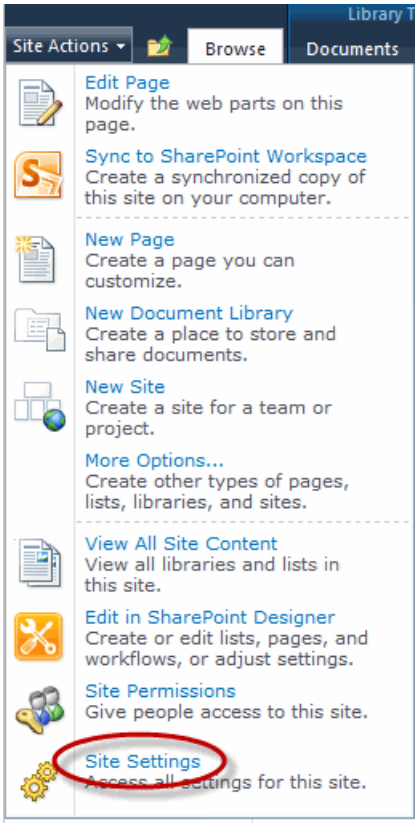
One method of customizing SharePoint, in a way that can be reused throughout the site or site collection or even the whole farm, is to create Site Columns and Content Types. Site columns are the simplest element; they are essentially the same as list and library columns except that you create them at the site level and then they can be used throughout that site and any child site. Content Types are a combination of Site Columns as well as additional settings and information such as document templates and workflows. Content Types, once created, can then be linked to lists and libraries.

8.1. Site Column Gallery

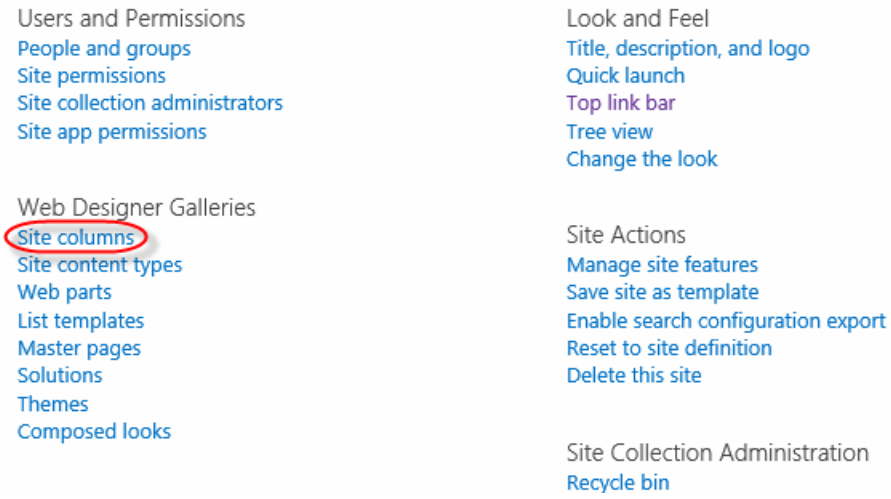
❖ 8.1.1. Explore the Site Column Gallery

This walk-through will explore the columns available in the Site Column Gallery.

1. Open a browser window if it is not already open and navigate to your root team site.
2. Click the **Settings** menu and select the **Site Settings** option from the list.



3. Click the **Site Columns** link in the **Web Designer Galleries** group on the **Site Settings** page.



4. Take a few minutes to browse the list of **Site Columns** and their groupings. The image below is a partial list of **Site Columns**.

Create Show Group: All Groups

Site Column	Type	Source
Base Columns		
Append-Only Comments	Multiple lines of text	Contoso Home Site
Categories	Single line of text	Contoso Home Site
End Date	Date and Time	Contoso Home Site
Language	Choice	Contoso Home Site
Start Date	Date and Time	Contoso Home Site
URL	Hyperlink or Picture	Contoso Home Site
Workflow Name	Single line of text	Contoso Home Site
Content Feedback		
Number of Likes	Number of Likes	Contoso Home Site
Number of Ratings	Number of Ratings	Contoso Home Site
Rating (0-5)	Rating (0-5)	Contoso Home Site
Core Contact and Calendar Columns		
Address	Multiple lines of text	Contoso Home Site
Anniversary	Date and Time	Contoso Home Site
Assistant's Name	Single line of text	Contoso Home Site
Assistant's Phone	Single line of text	Contoso Home Site
Birthday	Date and Time	Contoso Home Site
Business Phone	Single line of text	Contoso Home Site
Business Phone 2	Single line of text	Contoso Home Site

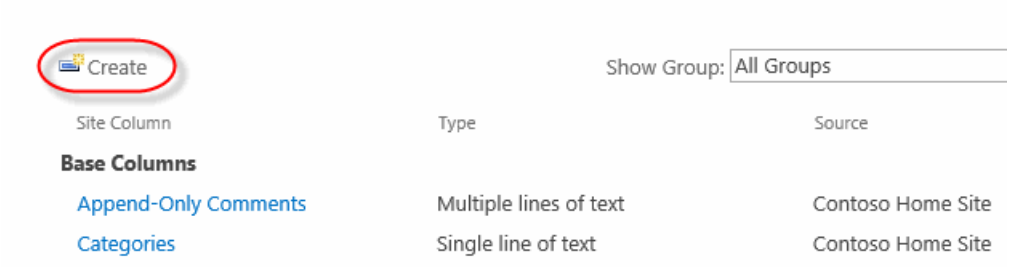
5. Leave the **Site Columns** gallery open for the next walk-through.

8.2. Creating Site Columns

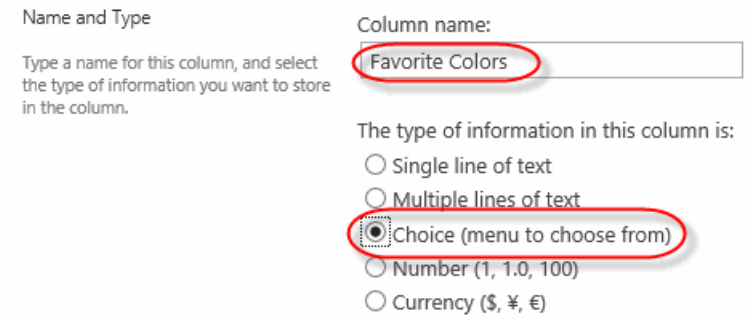
❖ 8.2.1. Create a Custom Site Column

In this walk-through, you will learn how to create a custom **Site Column**. Follow the steps in the previous walk-through to navigate to the **Site Column** gallery.

1. Click the **Create** link at the top of the **Site Column** gallery.



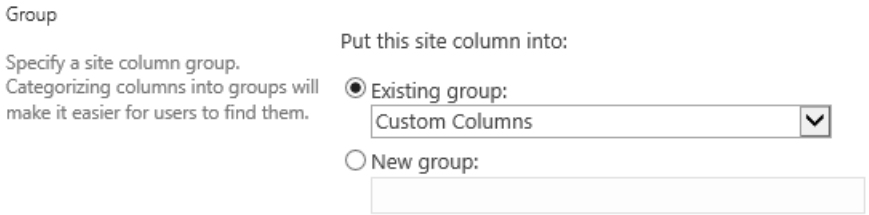
2. Enter `Favorite Colors` in the **Column name** field and select **Choice (menu to choose from)** from the **The type of information in this column is:** option field.



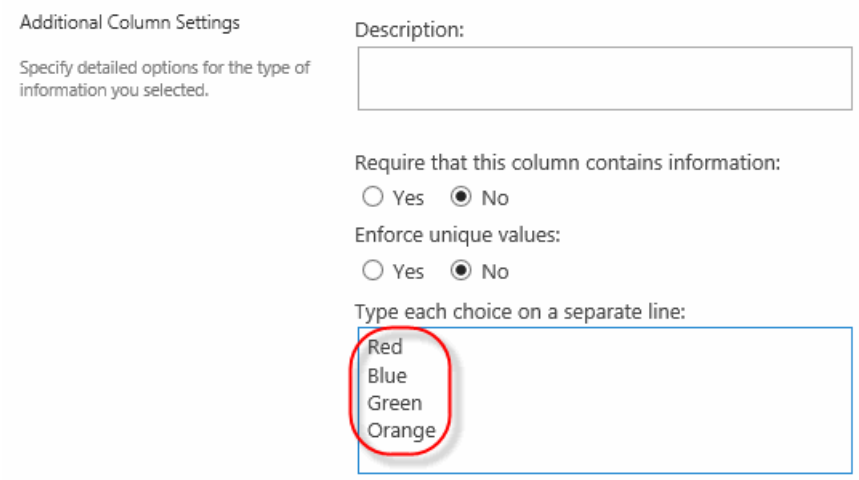
Note

Note that the column type choices are the same as for creating list or library columns. The main difference with Site Columns is that they can be reused on multiple lists and libraries throughout the site.

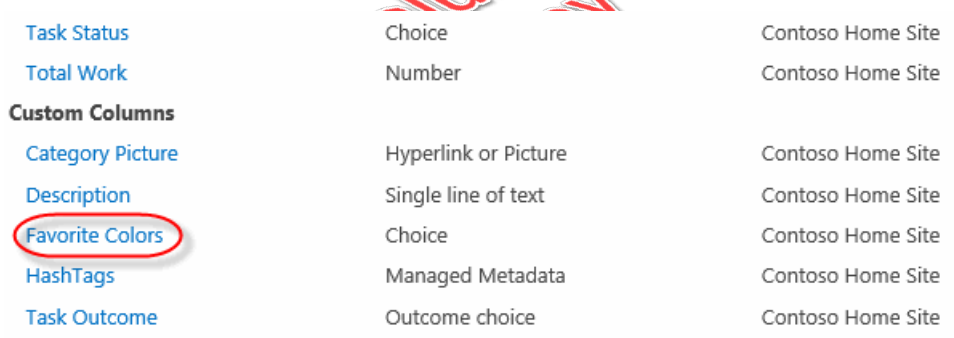
3. Note in the **Group** region you are leaving the default setting set to **Existing Group** and **Custom Columns**



4. Scroll down the **Site Column** page and enter some color values in the list box field labeled **Type each choice on a separate line**. Use the following image as a guide for what to enter.



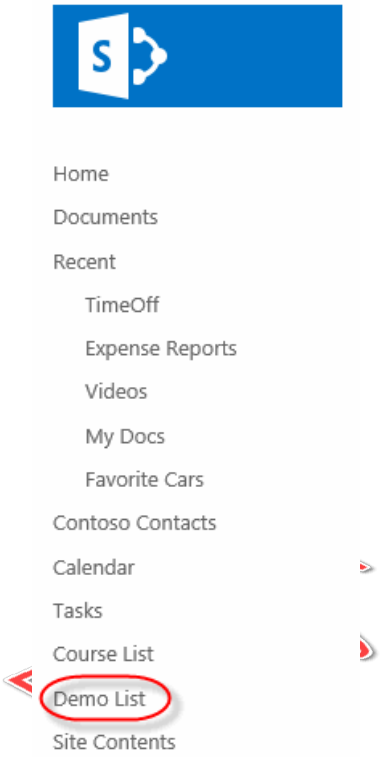
5. Click the **OK** button at the bottom of the form to save your work.
6. If you scroll down the list of **Site Columns**, you will find the new column **Favorite Colors** under the **Custom Columns** group.



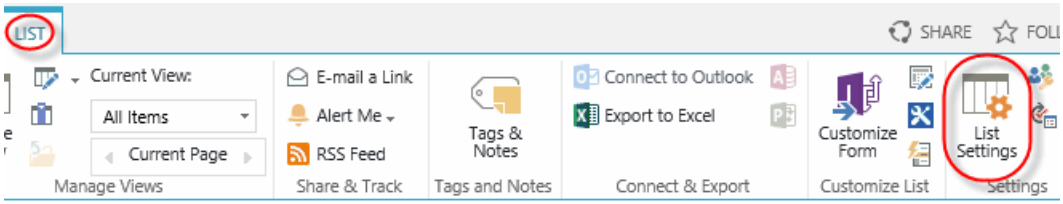
❖ 8.2.2. Add a Site Column to a List

In this walk-through, you will learn how to add a Site Column to a SharePoint list. This walk-through will use the **Demo List** that was created in an earlier walk-through but any list or library would work.

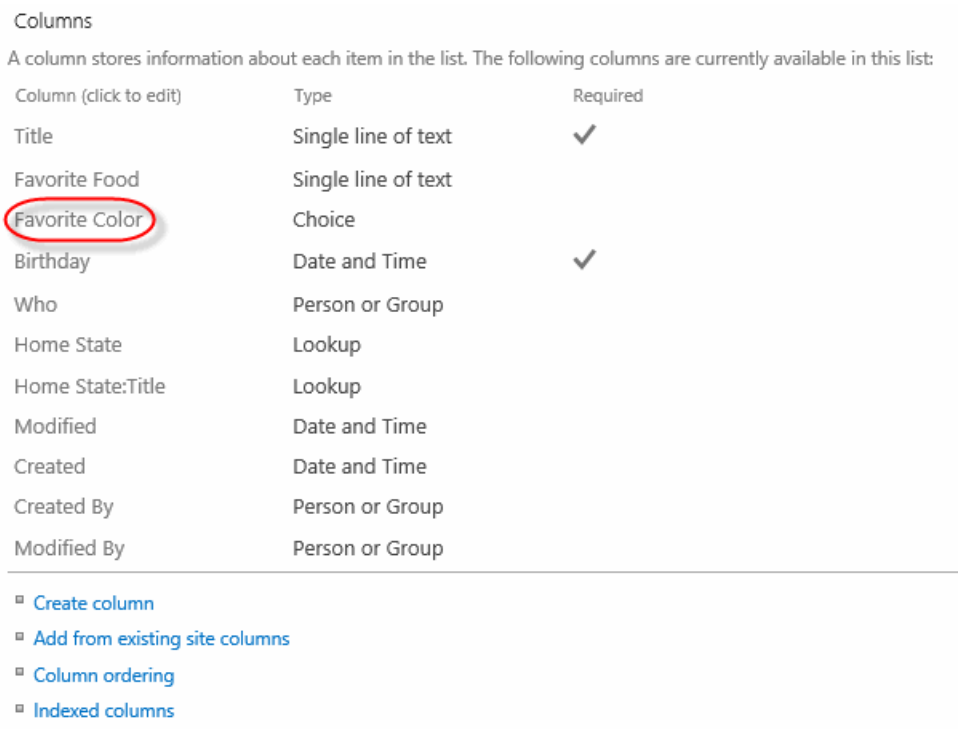
1. Click the **Demo List** link in the site's **Quick Launch** menu.



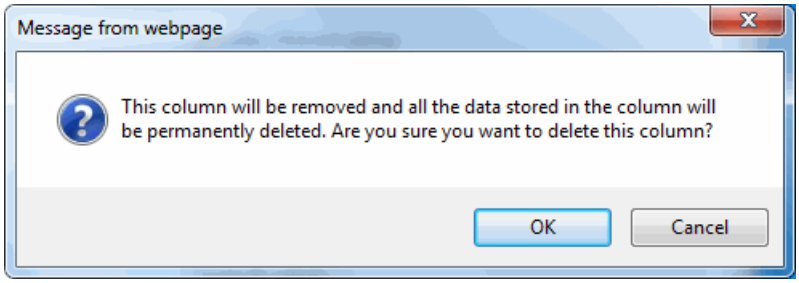
2. Click the **LIST** tab to open the toolbar and then click the **List Settings** button.



3. Scroll down the **List Settings** page and to the **Columns** region. The list already has a column named **Favorite Color**, but for the walk-through you want to replace that with the Site Columns version. Click the current **Favorite Color** column link to open the **Change Column** page for the column.



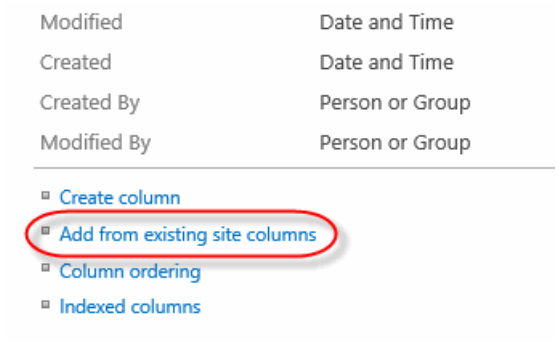
4. Click the **Delete** button at the bottom of the **Change Column** page.
5. Click the **OK** button to confirm that you want to delete this column from the list.



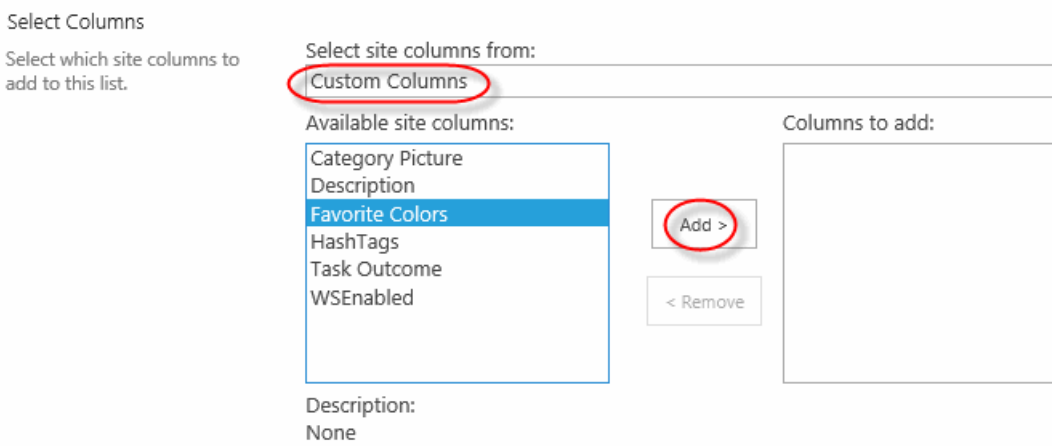
Note

Normally you would want to be very careful deleting a column from a list with data in it. Since this is just a test server and site, you should not be concerned about the potential loss of data.

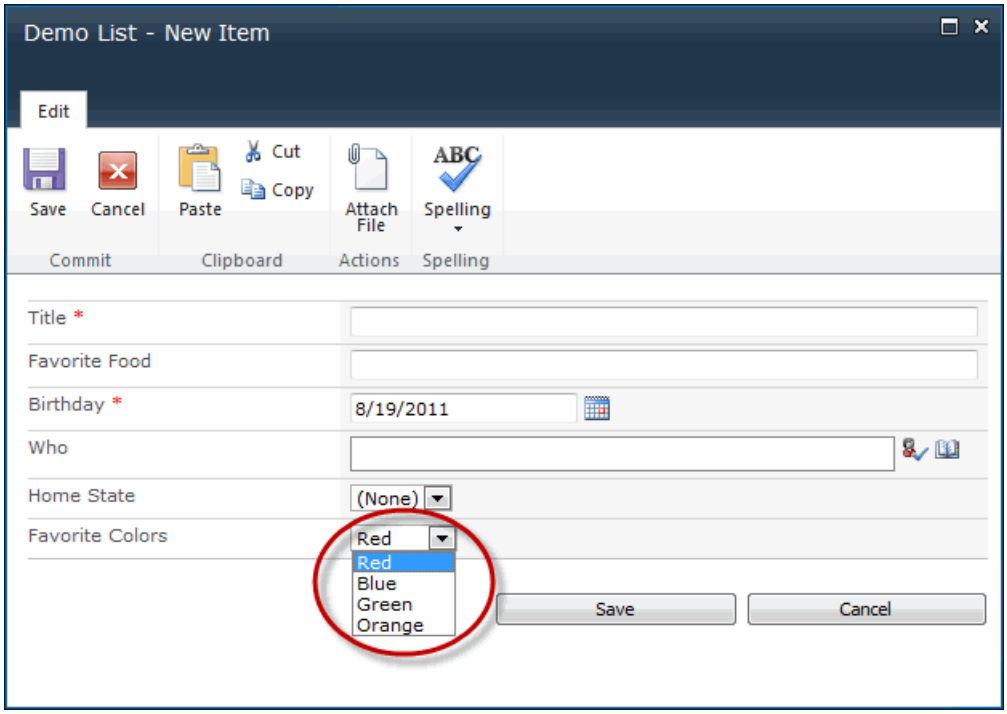
6. Verify that the **Columns** list no longer shows the **Favorite Color** column and click the **Add from existing site columns** link under the list of columns.



7. In the **Add Columns from Site Columns** page, change the **Select site columns from** drop-down field to **Custom Columns**, and click the **Add** button to move the **Favorite Colors** column to the **Columns to add** list.



8. Click the **OK** button to save our change back to the list's columns.
9. Navigate back the items view of the **Demo List** by clicking the link in the **Quick Launch** menu or in the **breadcrumbs**.
10. Click the **new item** link in the list to create a new item and test the Site Column.
11. Verify in the **Demo List - New Item** form that the **Favorite Colors** drop-down list has the colors that you defined in the Site Column. Click the **Cancel** button to close the form without saving.

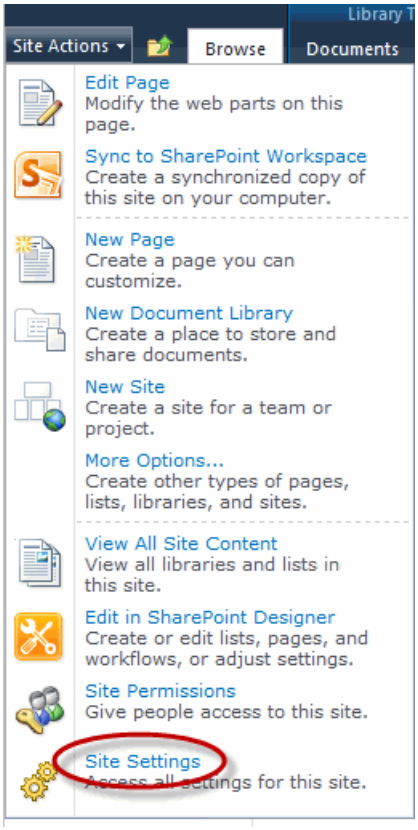


8.3. Site Content Type Gallery

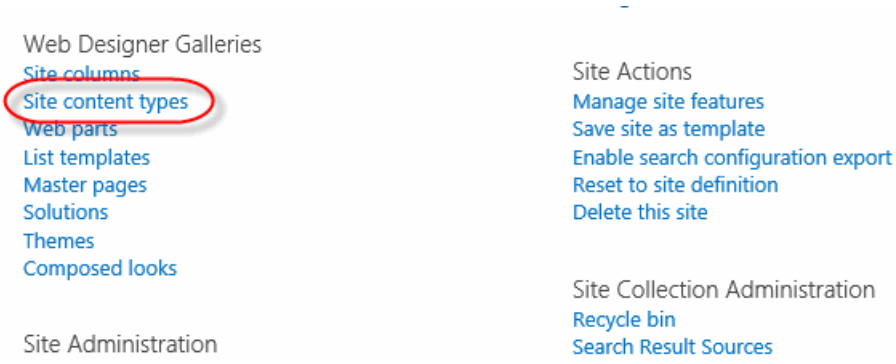
❖ 8.3.1. Explore the Site Content Types Gallery

This walk-through will explore the content types available in the Site Content Types Gallery.

1. Open our browser if it is not already open and navigate to your root team site.
2. Click the **Settings** menu and select the **Site Settings** option from the list.



3. Click the **Site content types** link in the **Web Designer Galleries** group on the **Site Settings** page.



4. Take a few minutes to browse the list of **Site Content Types** and their groupings. The image below is a partial list of **Site Content Types**.

Create

Show Group: All Groups

Site Content Type	Parent	Source
Business Intelligence		
Excel based Status Indicator	Common Indicator Columns	Contoso Home Site
Fixed Value based Status Indicator	Common Indicator Columns	Contoso Home Site
Report	Document	Contoso Home Site
SharePoint List based Status Indicator	Common Indicator Columns	Contoso Home Site
SQL Server Analysis Services based Status Indicator	Common Indicator Columns	Contoso Home Site
Web Part Page with Status List	Document	Contoso Home Site
Community Content Types		
Category	Item	Contoso Home Site
Community Member	Site Membership	Contoso Home Site
Site Membership	Item	Contoso Home Site
Digital Asset Content Types		
Audio	Rich Media Asset	Contoso Home Site
Image	Rich Media Asset	Contoso Home Site
Rich Media Asset	Document	Contoso Home Site
Video	System Media Collection	Contoso Home Site
Video Rendition	Rich Media Asset	Contoso Home Site
Display Template Content Types		
JavaScript Display Template	Document	Contoso Home Site
Document Content Types		

5. Leave the **Site Content Types** gallery open for the next walk-through.

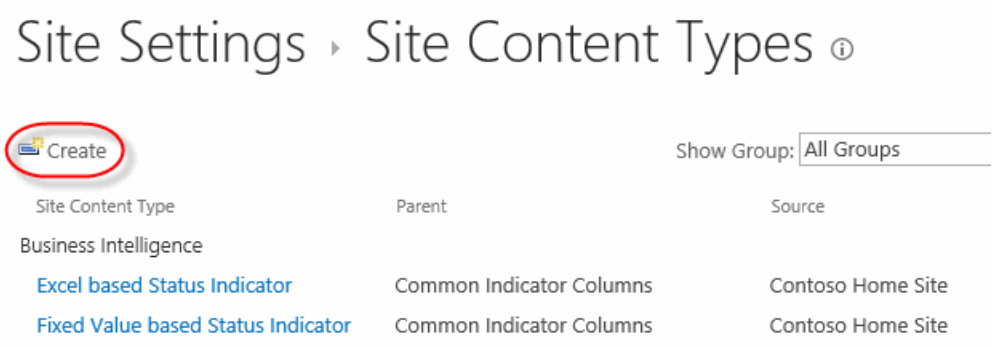
8.4. Creating Content Types

❖ 8.4.1. How to Create and Use Content Types

In this walk-through, you will learn to create a custom content type and apply it to a new document library.

1. Follow the previous demonstration to navigate to the Site content types gallery.
2. Create a new content type in the **Contoso Home Site** that extents the **Document** content type.

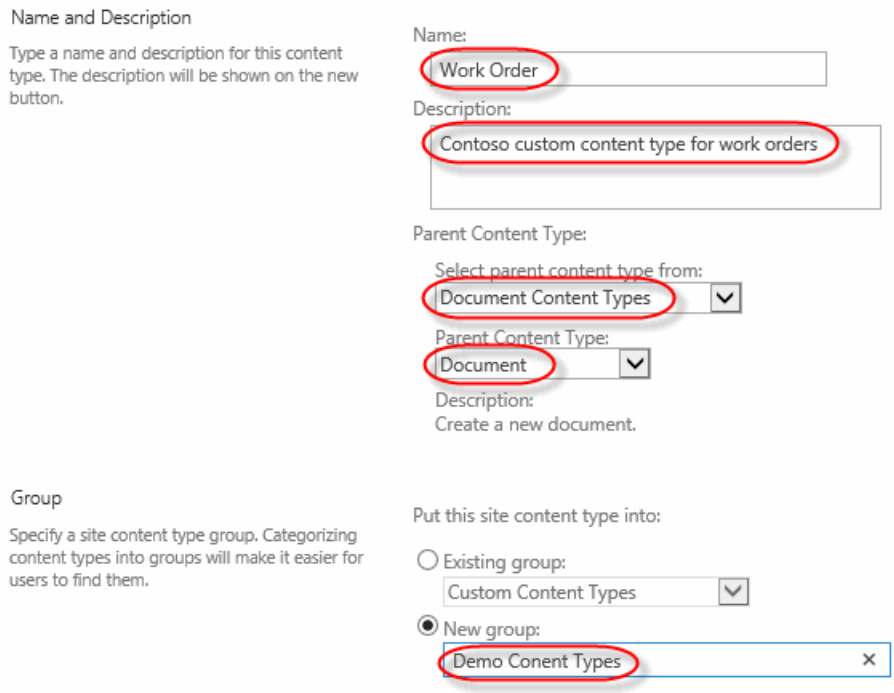
A. From within the **Site Content Types** gallery page, click the **Create** link at the top left of the page.



B. In the **New Site Content** form, use the following information to complete the form.

Field	Data
Name:	Type “Work Order”
Description:	Type “Contoso custom content type for work orders”
Select parent content type from:	Select **Document Content Types**
Parent Content Type:	Select **Document**
New group:	Type “Demo Content Types”

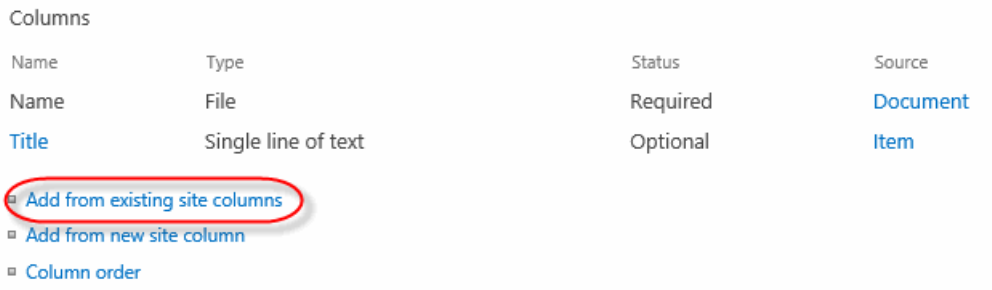
The completed form should look similar to the following image.



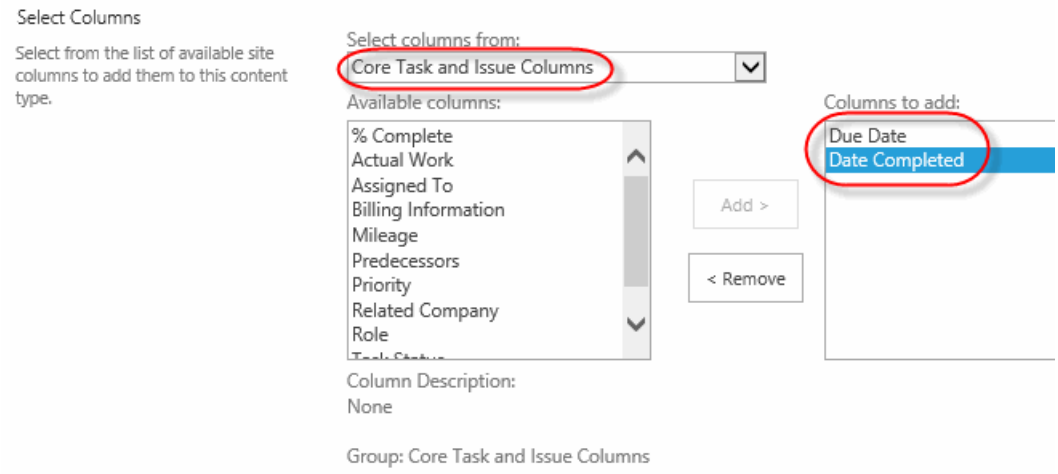
C. Click the **OK** button to complete the new content type creation process.

3. Add columns to the new **Work Order** content type.

   A. Click the **Add from existing site columns** link below the **Columns** region on the **Site Content Type Information** page.

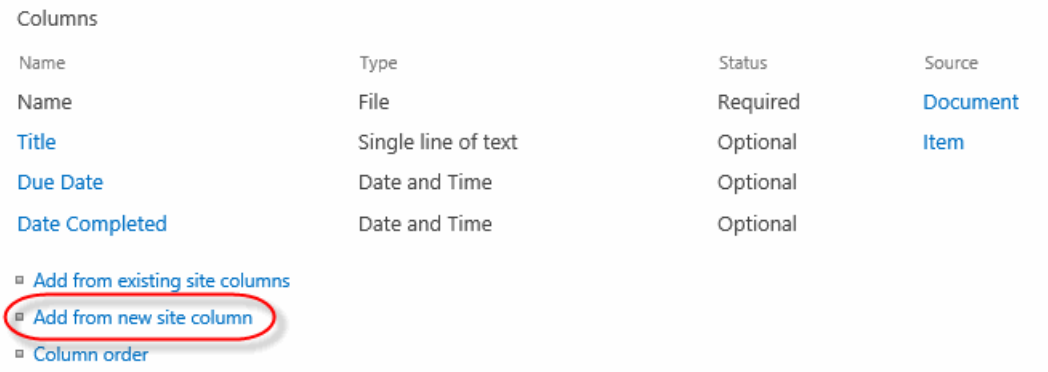


   B. In the **Add Columns to Content Type** form, select **Core Task and Issue Columns** in the **Select columns from** drop-down box. From the **Available columns** list box, choose both **Due Date** and **Date Completed** then click the **Add** button to add them to the **Columns to add** list box.

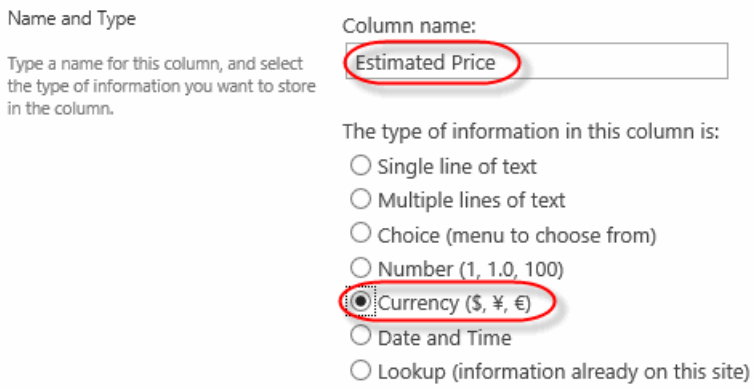


C. Click the **OK** button to complete adding the site columns to the **Work Order** content type.

D. Click the **Add from new site column** link below the **Columns** region on the **Site Content Type Information** page.Es



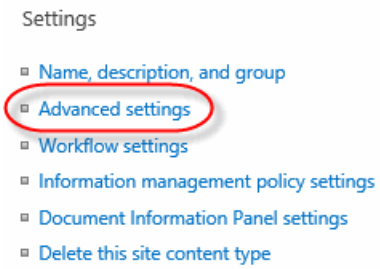
E. On the **New Site Column** form, enter `Estimated Price` in the **Column Name** field. Note the **Additional Column Settings** available to the **Currency** column type but leave everything at their default settings.



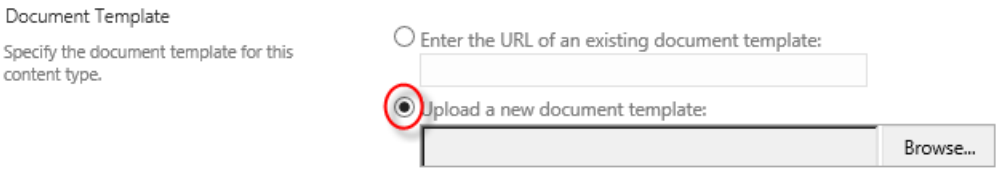
F. Click the **OK** button to save your changes and complete the creation of the new site column.

4. Assign a document template to the new **Work Order** content type.

   A. Click the **Advanced settings** link under the **Settings** region on the **Work Order** content type information page.



   B. Click the **Upload a new document template** option on the **Advanced Settings** page and then click the **Browse** button to find the file.

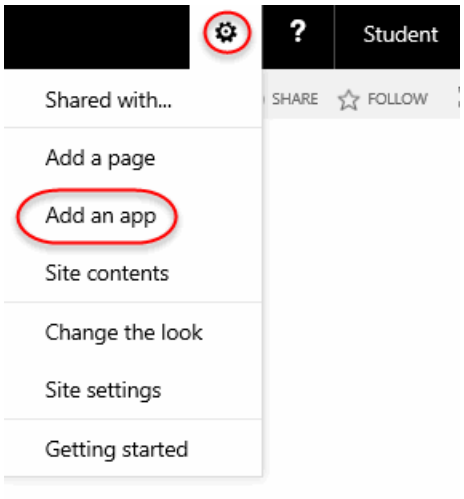


   C. Navigate to the folder you downloaded the class files to and select the `work-order.docx` file. Click the **Open** button to complete the file selection.

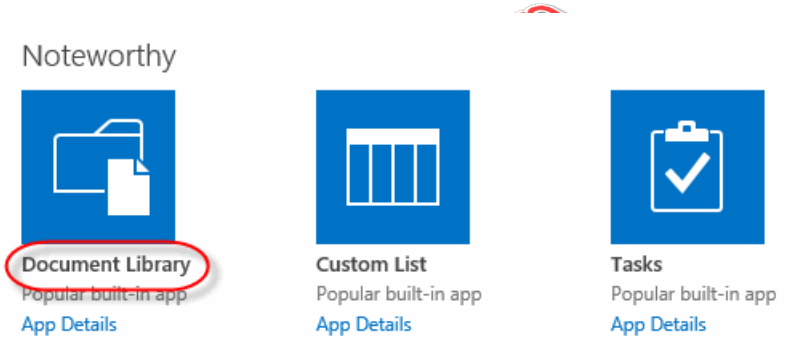
   D. Click the **OK** button on the **Advanced Settings** page to save your changes to the **Work Order** content type.

5. Create a new document library named **Work Orders**.

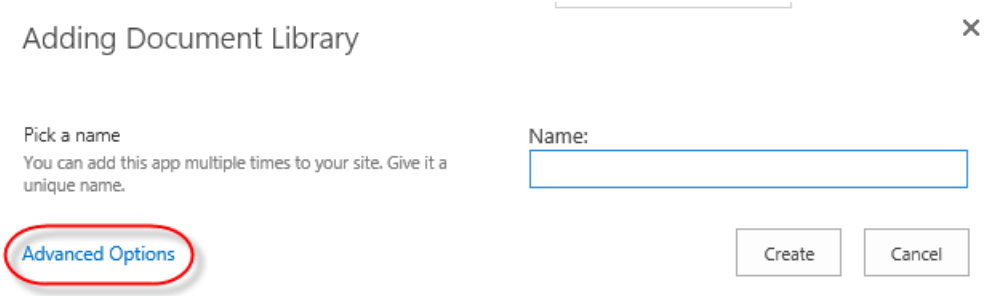
A. From the root team site, click the **Settings** icon and select **Add an app** from the menu.



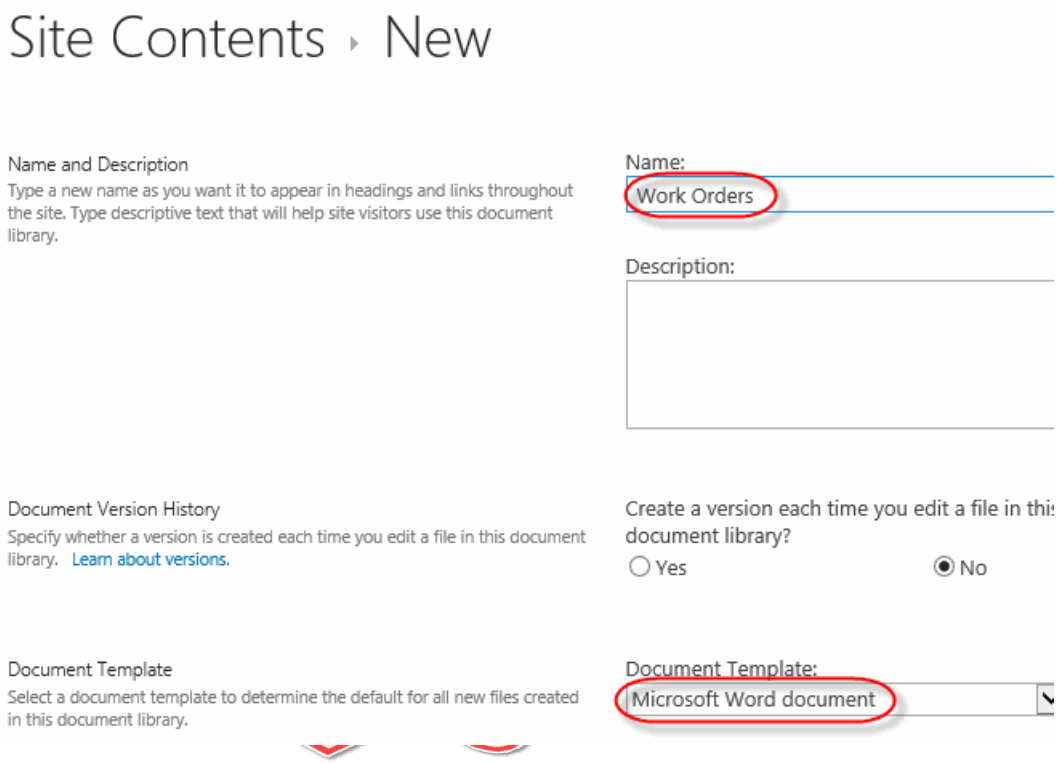
B. Click the **Document Library** link in the **Your Apps** template choice page.



C. Click the **Advanced Options** link on the **Adding Document Library** dialog.

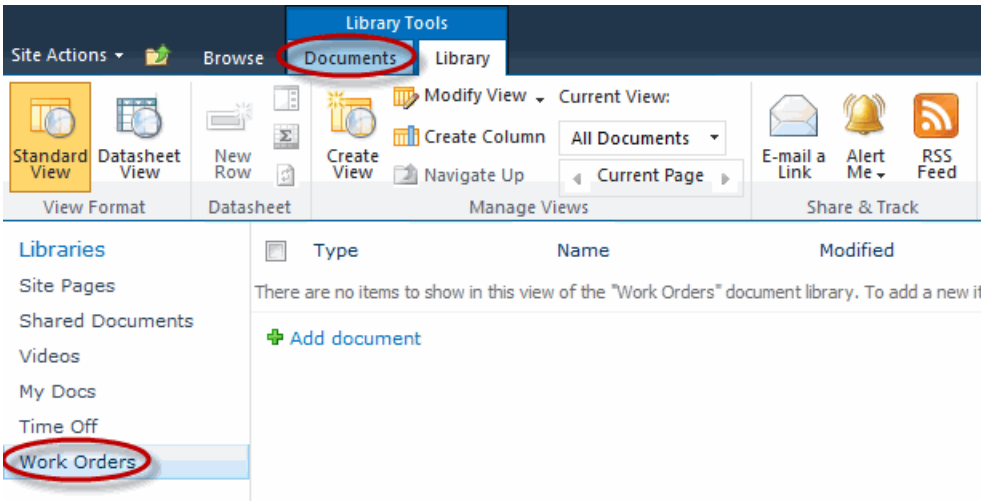


D. Type “Work Orders” in the **Name** field on the **New** form and leave the rest of the settings at their default values. Note that the default **Document Template** is set to **Microsoft Word document**.

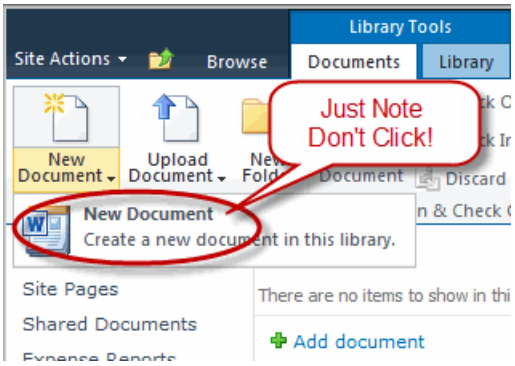


E. Click the **Create** button on the **New Document Library** form to complete the new library creation process.

F. Click the **FILES** tab to open the toolbar in the new **Work Orders** document library.

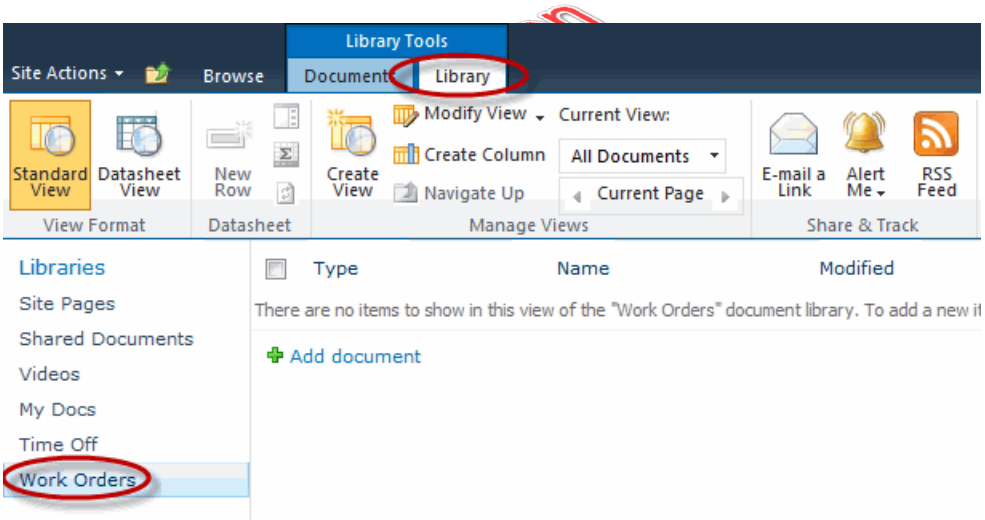


G. Click the **New Document** text and arrow, careful not to click the icon above, and note there is currently only one choice in the drop-down menu titled **New Document**. Don't click it; all you are doing is verifying that the library supports only one content type at this point.

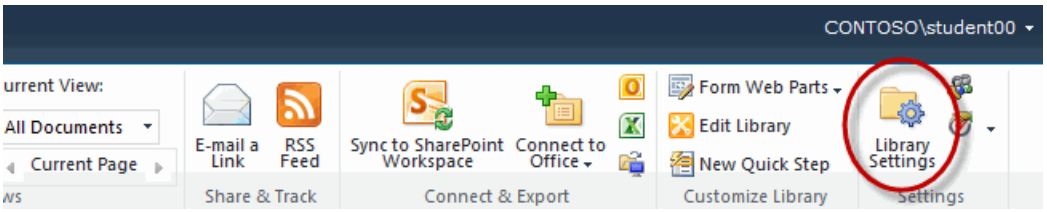


6. Add the **Work Order** content type to the **Work Orders** document library.

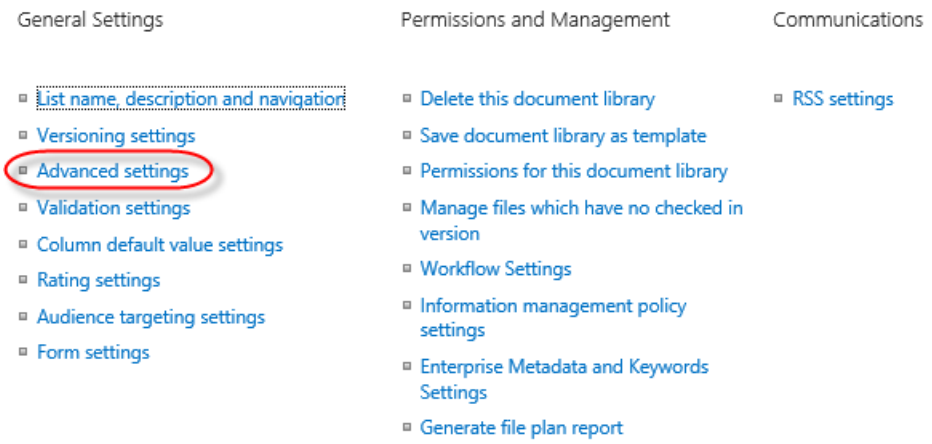
A. Click the **LIBRARY** tab to open the toolbar in the new **Work Orders** document library.



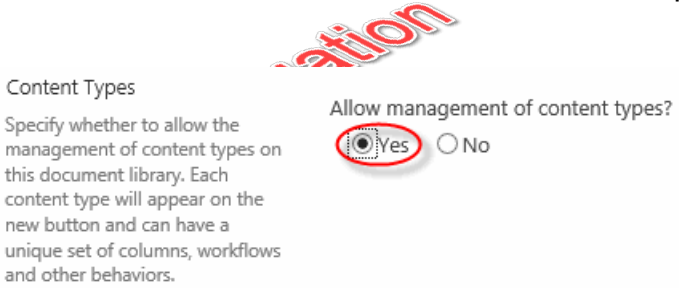
B. Click the **Library Settings** button on the **LIBRARY** tab located in the **Settings** group.



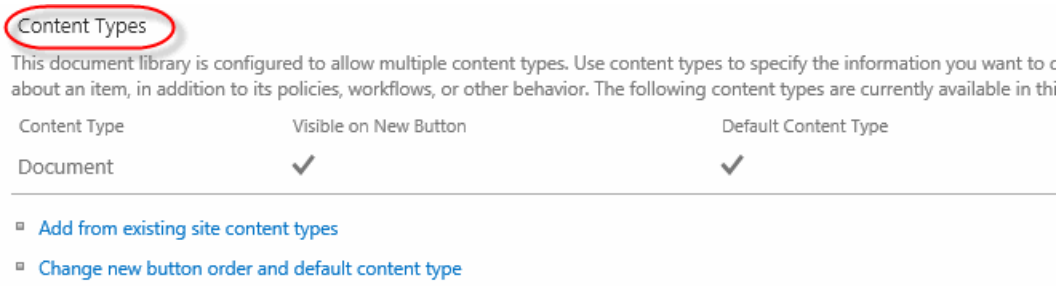
C. Click the **Advanced Settings** link on the **Document Library Settings** page in the **General Settings** region.



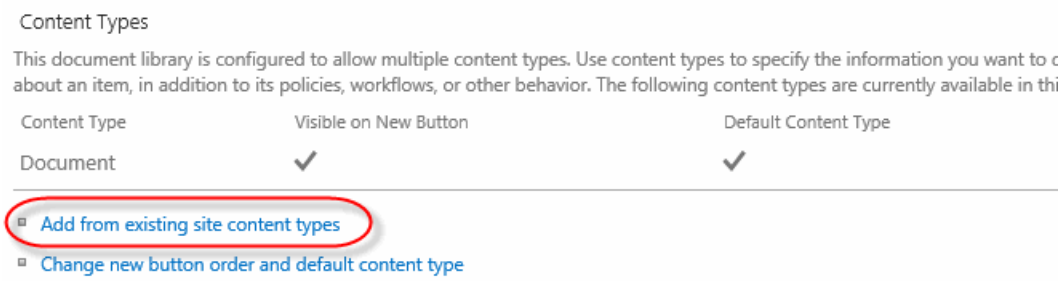
D. Click the **Yes** option under the label **Allow management of content types?** and then click the **OK** button at the bottom of the page to save the change.



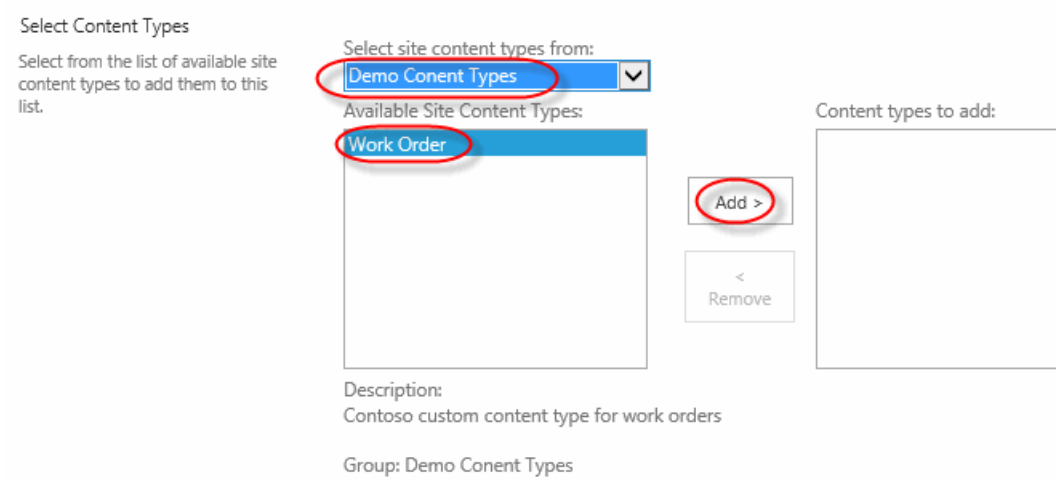
E. You should now see a **Content Types** region that was not being displayed before you made the change in the previous step.



F. Click the **Add from existing site content types** link at the bottom of the **Content Types** region.



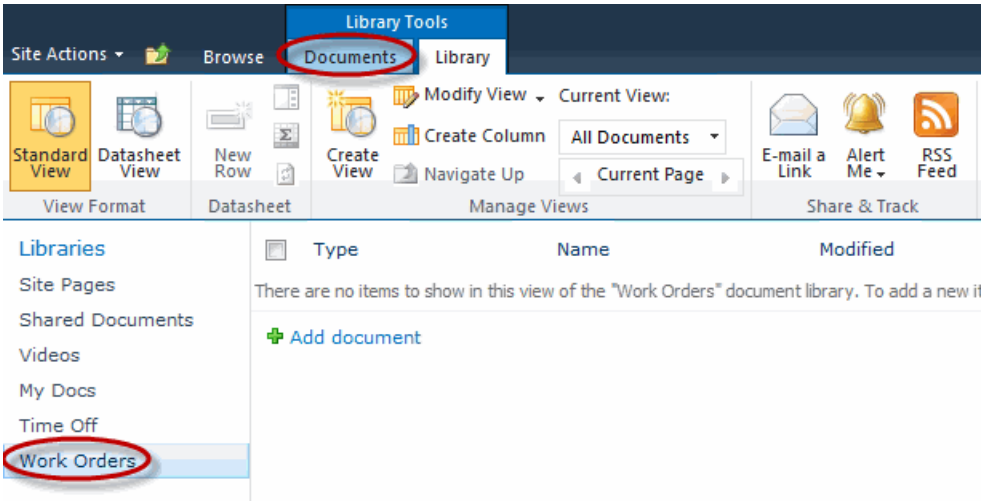
G. In the **Add Content Types** form, select **Demo Content Type** in the drop-down box labeled **Select site content types from**. Select **Work Orders** in the list box labeled **Available Site Content Types** and click the **Add** button to move it to the list box labeled **Content types to add**. Click the **OK** button to save your changes.



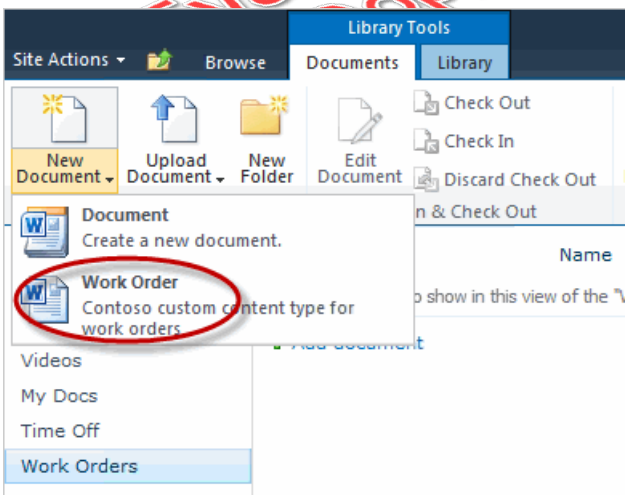
7. Add a new document to the **Work Orders** library based on the **Work Order** content type.

   A. Click the **Work Orders** link in either the **Quick Launch** menu or the Site's **Breadcrumbs** to take you to the **Browse** view of the **Work Orders** library.

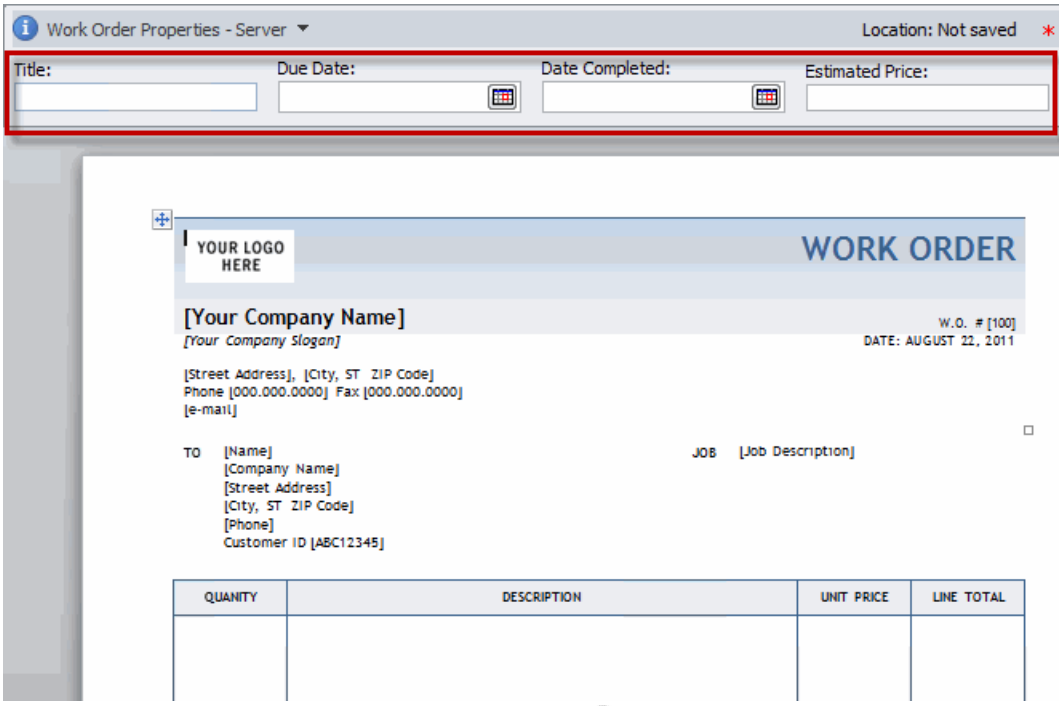
   B. Click the **FILES** tab to open the toolbar in the **Work Orders** document library.



C. Click the **New Document** text and arrow, careful not to click the icon above, and note that now there are two choices of document types to create. Click the **Work Order** link.



D. Microsoft Word will open a new document based on the template we loaded into the **Work Orders** content type.

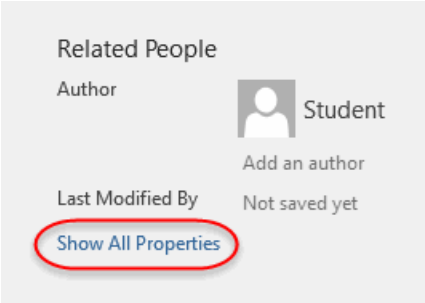


Note

If you are using Word 2013 you will see a Document Information Panel that allows you to enter values for the SharePoint fields at the top of the document. Microsoft removed the Document Information Panel from the 2019 version of Word. In the next step you'll use the **File** tab in Word to set the SharePoint field values.

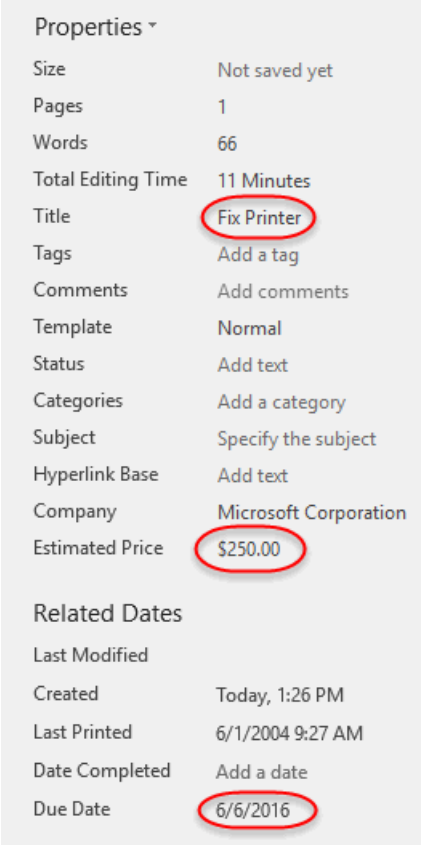
E. Click the **File** tab above the Word toolbar.

F. Click the **Show All Properties** link on the **Info** page.



G. Use the following information in the table to fill in the **Document Information Panel** fields.

Field	Data
Title:	Type: “Fix Printer”
Due Date:	Select 5 days from the current date
Date Completed:	Leave empty
Estimated Price:	Type: “250”

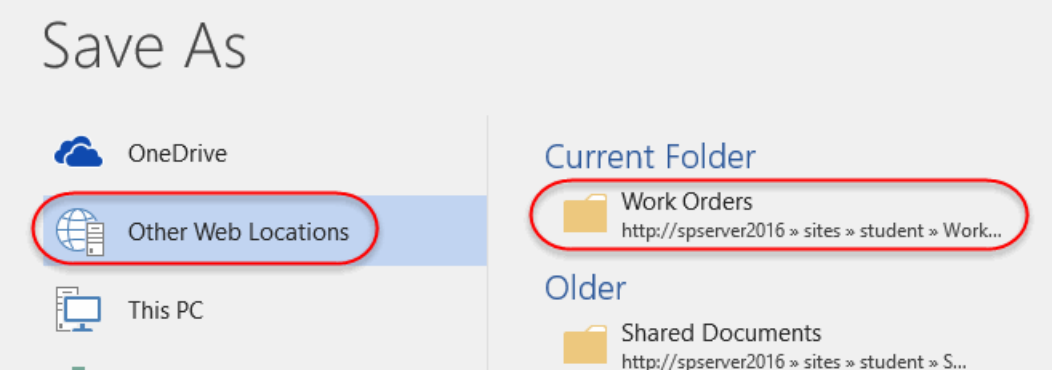


H. Use the **Back** arrow in the top left corner of the **Info** page to navigate back to the editing view of the document.

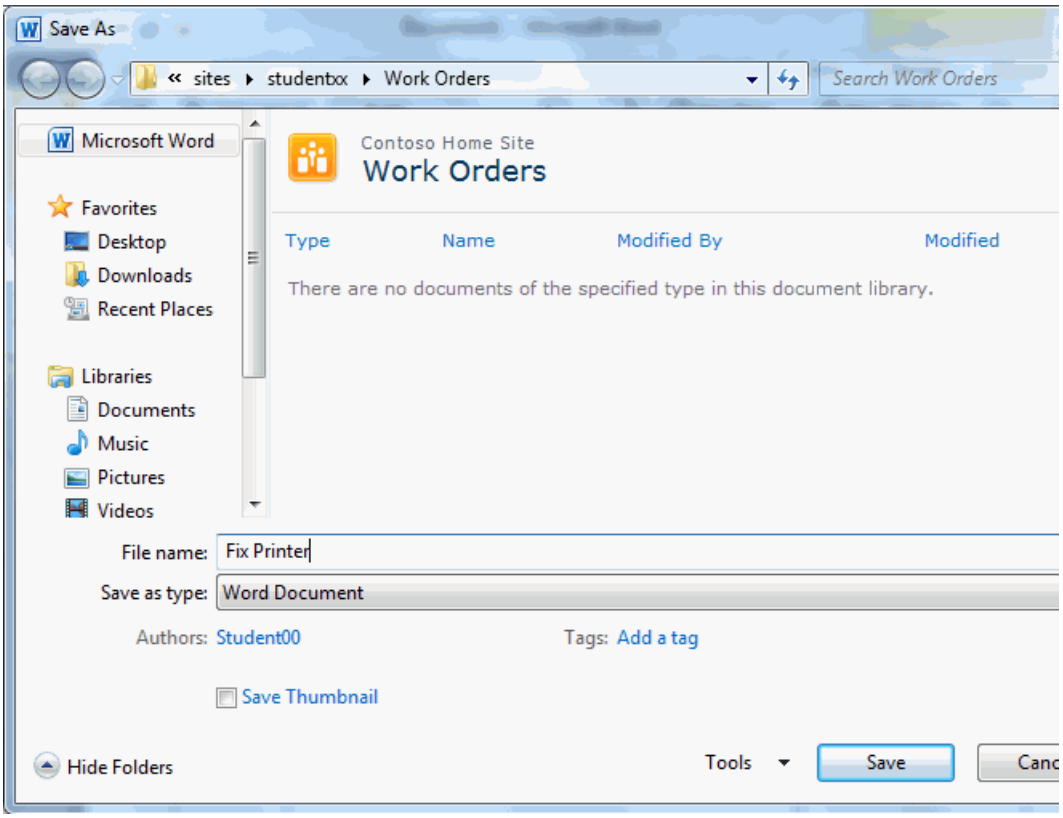
I. In the document body, change the title text “Your Company Name” to “Contoso”. We can optionally fill out any additional information in the document we like.

J. Click the **Save** icon in the top-left corner of the Microsoft Word window.

K. Click the **Other Web Locations** and then click the **Work Orders** link under **Current Folder** in the **Save As** view.



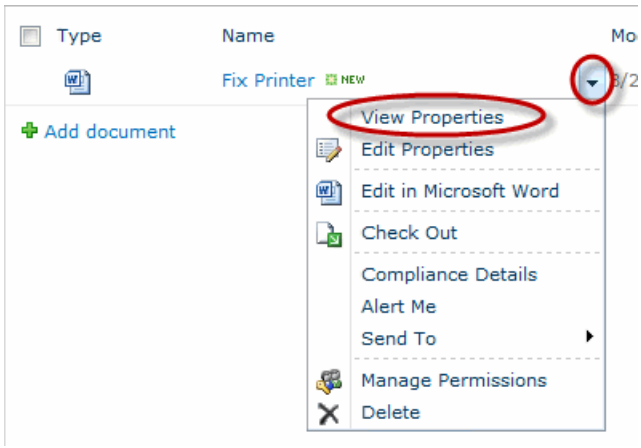
L. In the **Save As** dialog window, enter `Fix Printer` for the document file name and click the **Save** button.



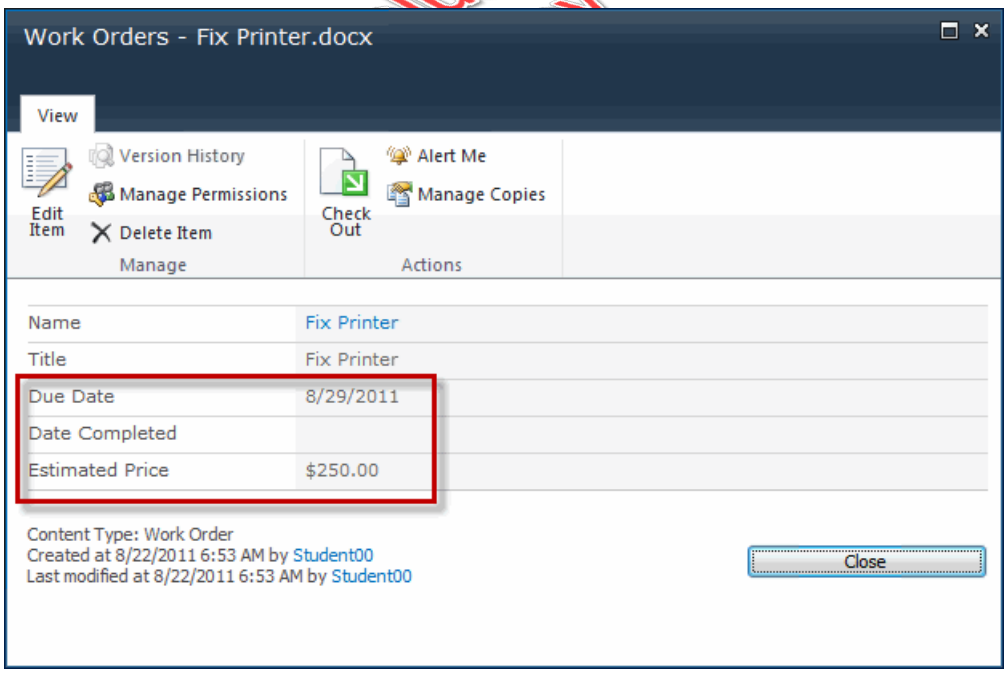
M. Close Microsoft Word.

N. If the new **Fix Printer** document item does not show in our **Work Orders** library, you need to refresh your browser view of it. We can do that by clicking the **Work Orders** link in the **Quick Launch** menu.

O. Click the ellipsis button next to the **Fix Printer** item then click the second ellipsis in the balloon pop-up. From the drop-down menu, select the **Properties** link.



P. Note the properties that are displayed, especially the properties that were added by the **Work Order** content type. These properties represent additional meta data that is stored by SharePoint outside the document itself.



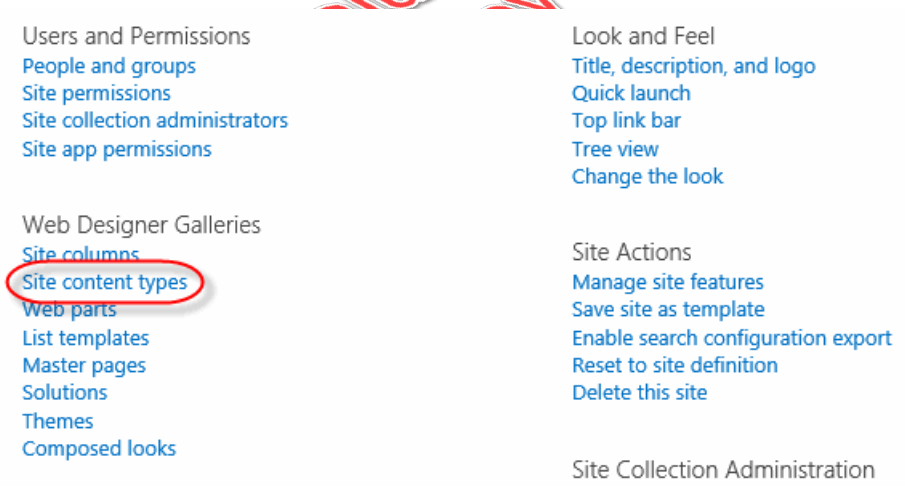
Q. Click the **Cancel** button to close the properties for **Fix Printer**.

Exercise 15: Creating and Working with Content Types

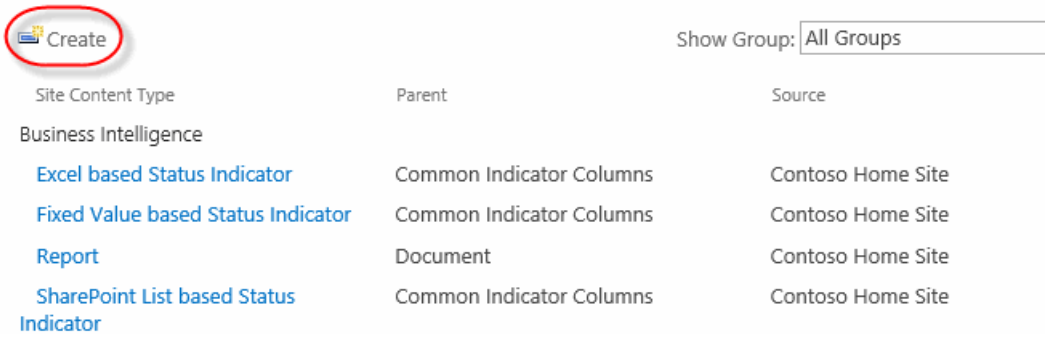
10 to 15 minutes

In this exercise, you will learn to create Content Types and Site Columns. Additionally you will learn how to associate a document template with a content type based on the **Document** parent content type.

1. Create a new Content Type for the Contoso Home Site.
   A. Open your browser if it is not already open and navigate to your root team site.
   B. Click the **Settings** menu and select the **Site Settings** link.
   C. Click the **Site content types** link within the **Web Designer Galleries** group.



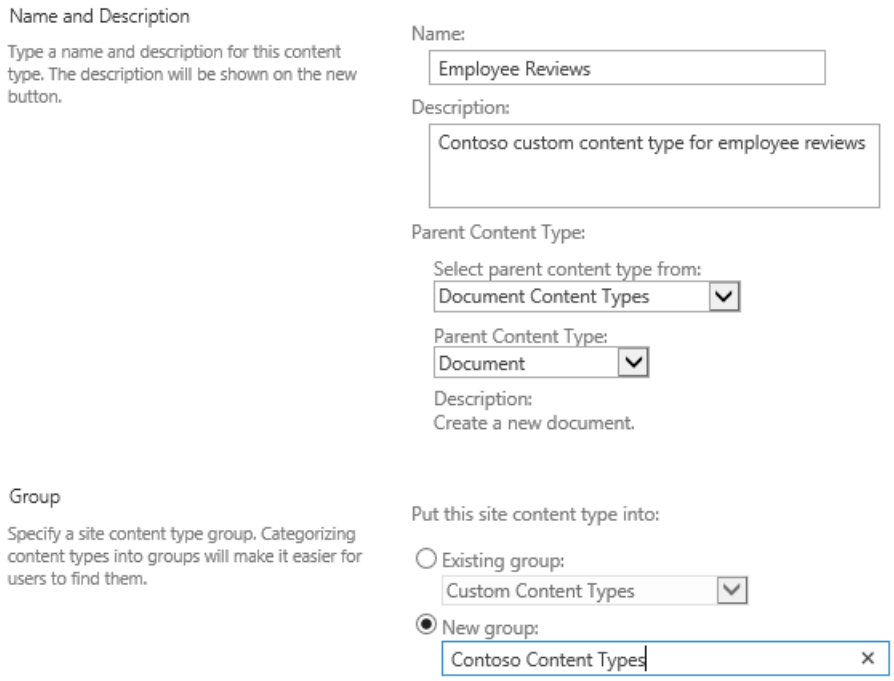
   D. Take a moment to read through the list of default content types. Note how they are grouped and there is a parent column that lists the parent content type of each individual content type.
   E. Click the **Create** link at the top of the list of content types.



F. In the **New Site Content** form, use the following information to complete the form.

Field	Data
Name:	Type “Employee Reviews”
Description:	Type “Contoso custom content type for employee reviews”
Select parent content type from:	Select **Document Content Types**
Parent Content Type:	Select **Document**
New group:	Type “Contoso Content Types”

The completed form should look similar to the following image.

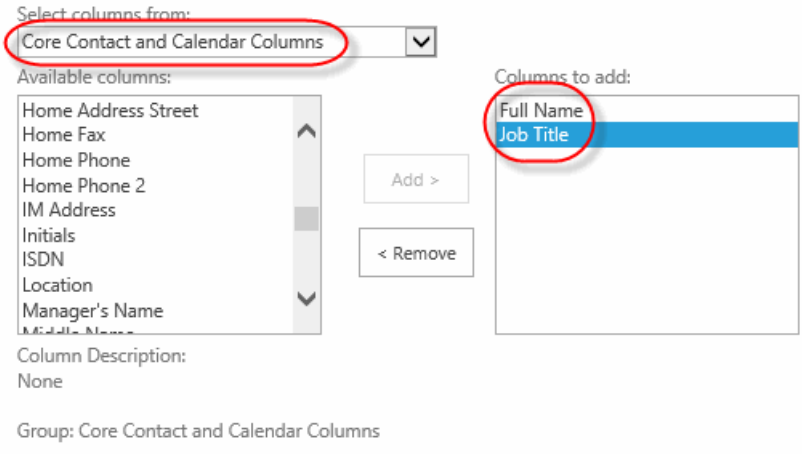


G. Click the **OK** button to complete the new content type creation process.

2. Add columns to the new **Employee Reviews** content type.

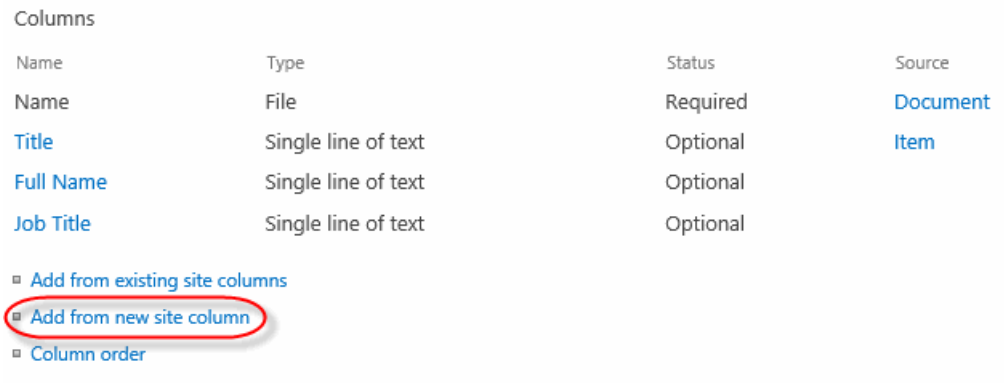
   A. Click the **Add from existing site columns** link below the **Columns** region on the **Site Content Type Information** page.

   B. In the **Add Columns to Content Type** form, select **Core Contact and Calendar Columns** in the **Select columns from** drop-down box. From the **Available columns** list box, choose both **Full Name** and **Job Title** then click the **Add** button to add them to the **Columns to add** list box.

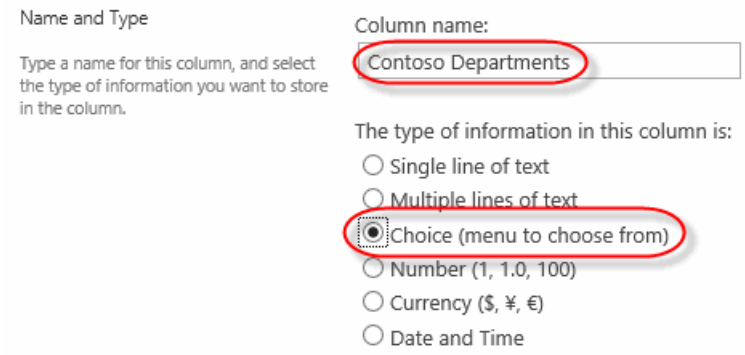


   C. Click the **OK** button to complete adding the site columns to the **Employee Reviews** content type.

   D. Click the **Add from new site column** link below the **Columns** region on the **Site Content Type Information** page.



E. On the **New Site Column** form, enter "Contoso Departments" in the **Column Name** field and choose **Choice (menu to choose from)** in the **The type of information in this column is** selection field.



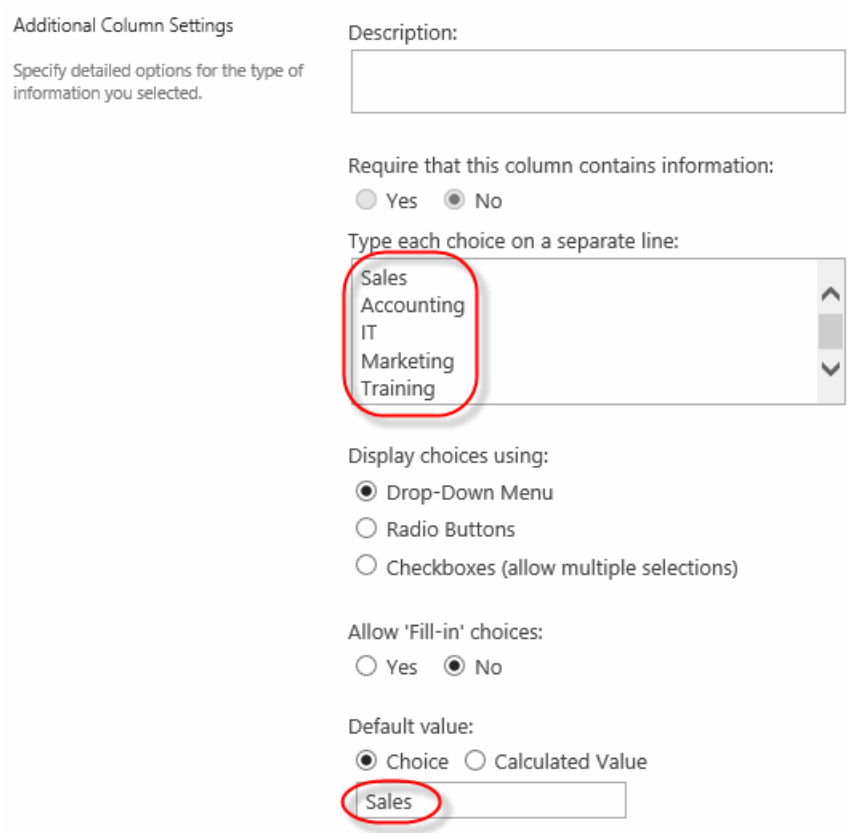
Note

Note that this **New Site Column** form is the same form you get when you add a column directly to a list or library.

F. Locate the **Additional Column Settings** region further down on the **New Site Column** form. Replace the text in the field labeled **Type each choice on a separate line** with the following:

```
Sales
Accounting
IT
Marketing
Training
```

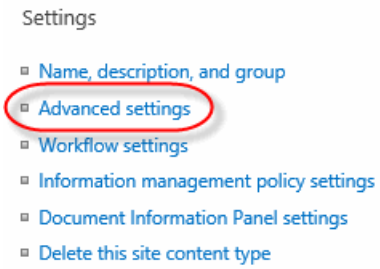
Click inside the **Default value** field and make sure “Sales” is set to the default value. Leave the rest of the settings set to the defaults.



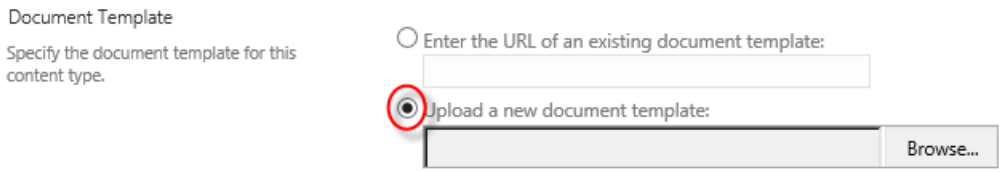
G. Click the **OK** button to save your changes and complete the creation of the new site column.

3. Assign a document template to the new **Employee Reviews** content type.

   A. Click the **Advanced settings** link under the **Settings** region on the **Employee Reviews** content type information page.



B. Click the **Upload a new document template** option on the **Advanced Settings** page and then click the **Browse** button to find the file.



C. Navigate to the folder you downloaded the class files to and select the `Employee Review.docx` file. Click the **Open** button to complete the file selection.

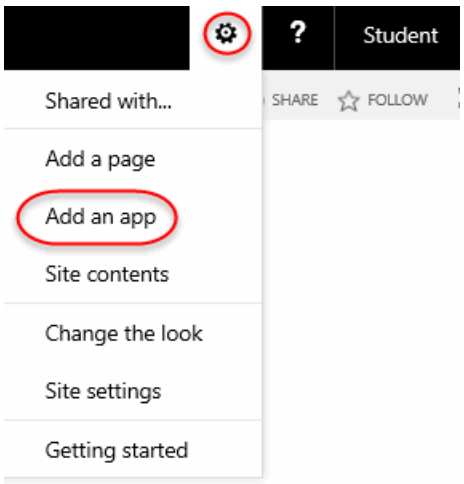
D. Click the **OK** button on the **Advanced Settings** page to save your changes to the **Employee Reviews** content type.

Exercise 16: Adding a Content Type to a Library

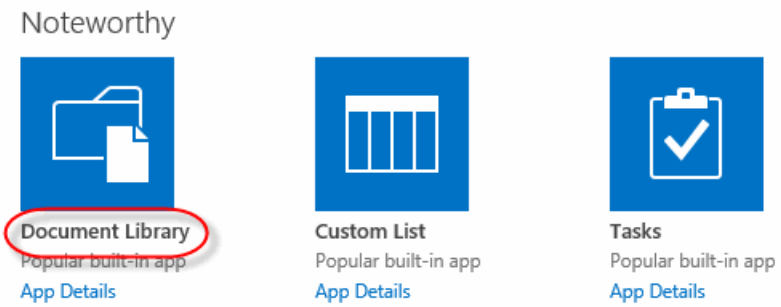
10 to 15 minutes

In this exercise, you will learn to associate the custom content type you built in the previous exercise with a new Document Library.

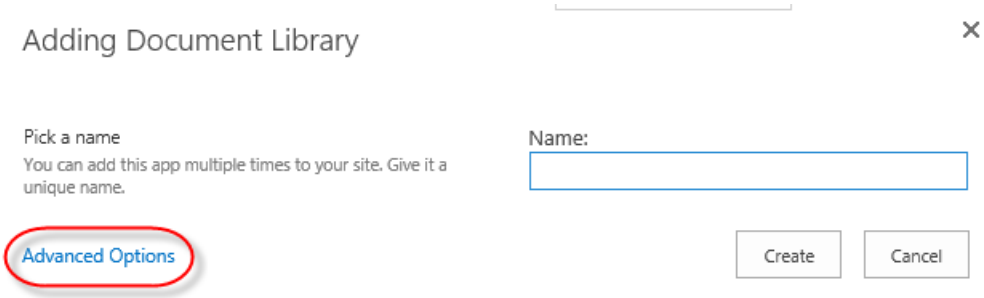
1. Create a new Document Library.
   A. From the root team site, click the **Settings** icon and select **Add an app** from the menu.



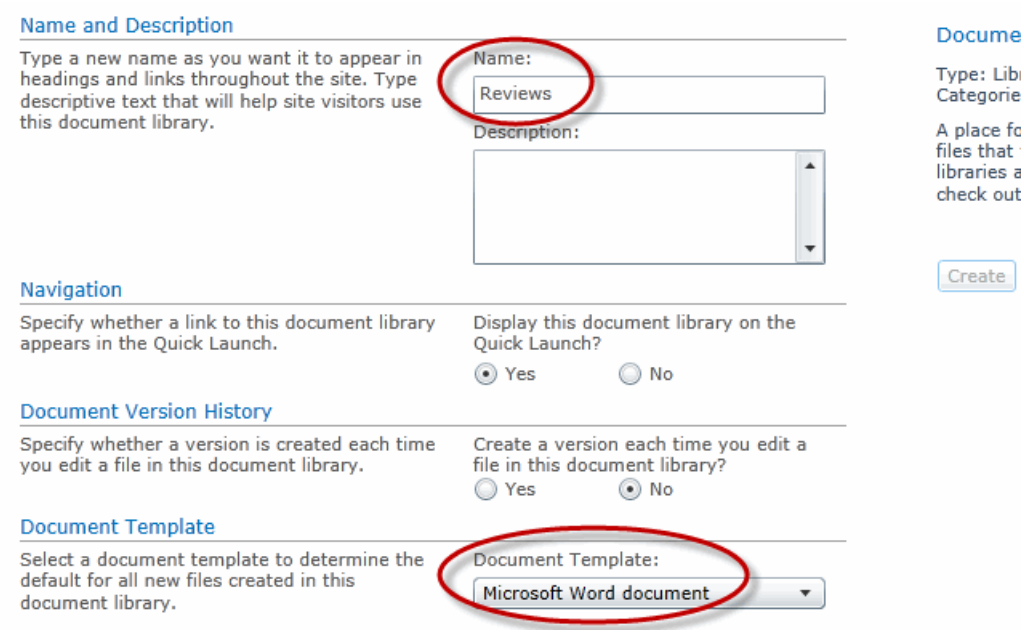
   B. Click the **Document Library** link in the **Your Apps** template choice page.



   C. Click the **Advanced Options** link on the **Adding Document Library** dialog.

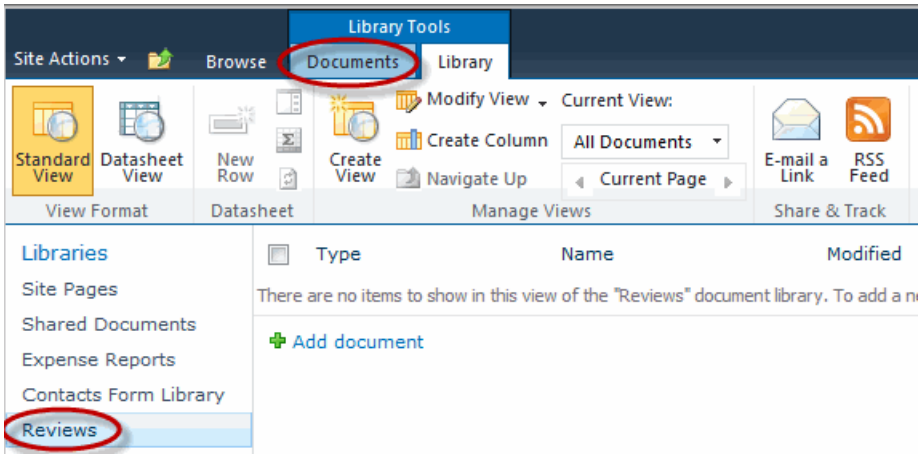


D. Type “Reviews” in the **Name** field on the **New Document Library** form and leave the rest of the settings at their default values. Note that the default **Document Template** is set to **Microsoft Word document**.

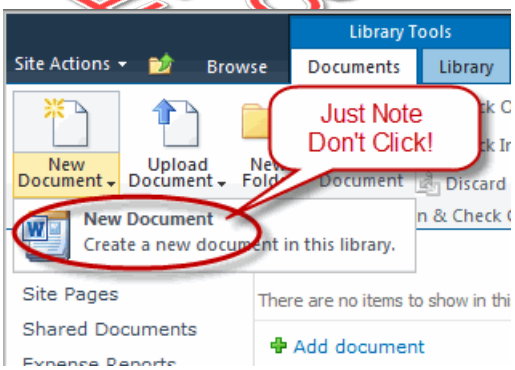


E. Click the **Create** button on the **New Document Library** form to complete the new library creation process.

F. Click the **FILES** tab to open the toolbar in the new **Reviews** document library.

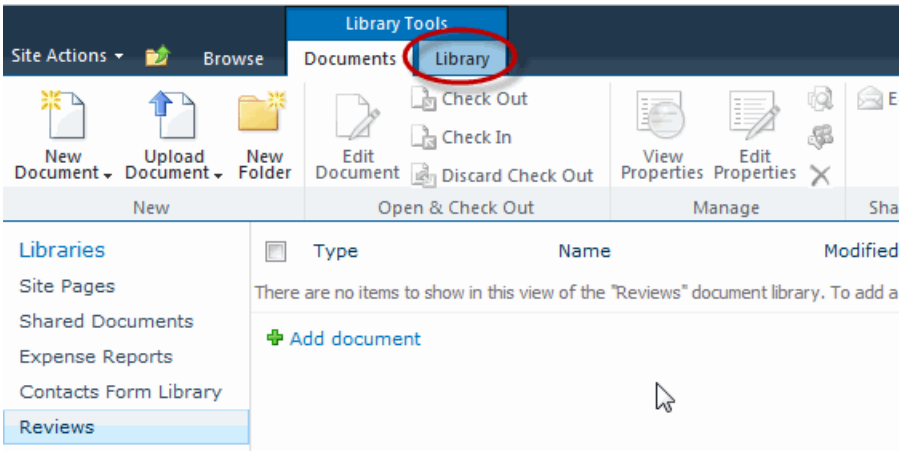


G. Click the **New Document** text and arrow, careful not to click the icon above, and note there is currently only one choice in the drop-down menu titled **New Document**. Don't click it; all you are doing is verifying that the library supports only one content type at this point.

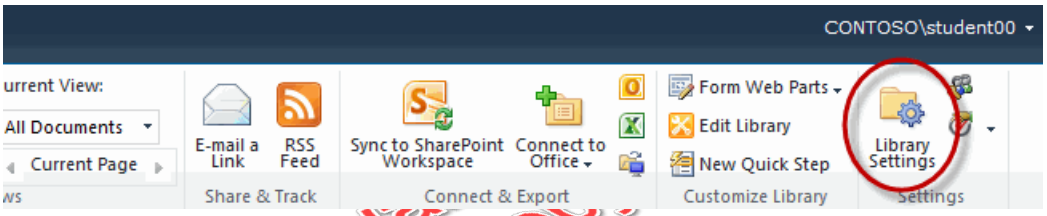


2. Add the **Employee Reviews** content type to the **Reviews** document library.

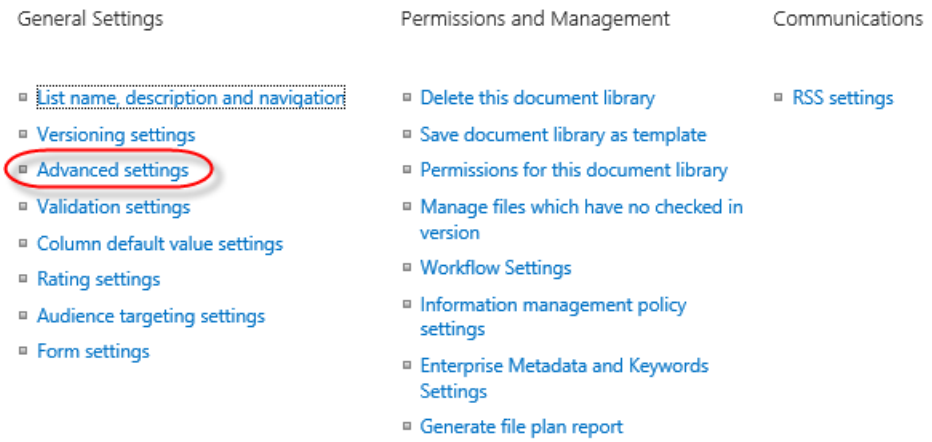
   A. Click the **LIBRARY** tab to open the toolbar in the new **Reviews** document library.



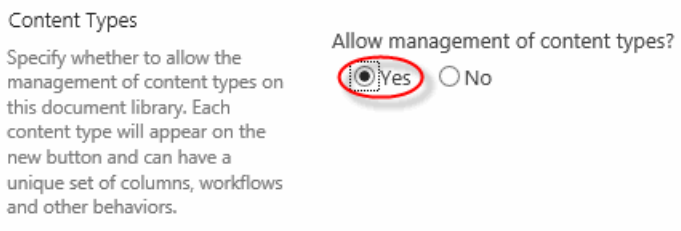
B. Click the **Library Settings** button on the **Library** tab located in the **Settings** group.



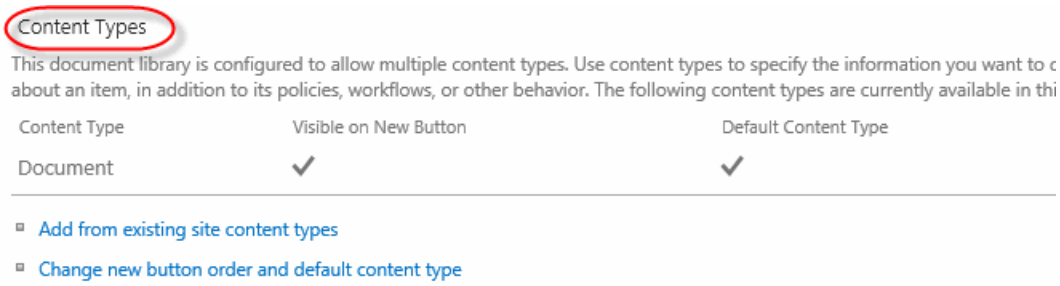
C. Click the **Advanced Settings** link on the **Document Library Settings** page in the **General Settings** region.



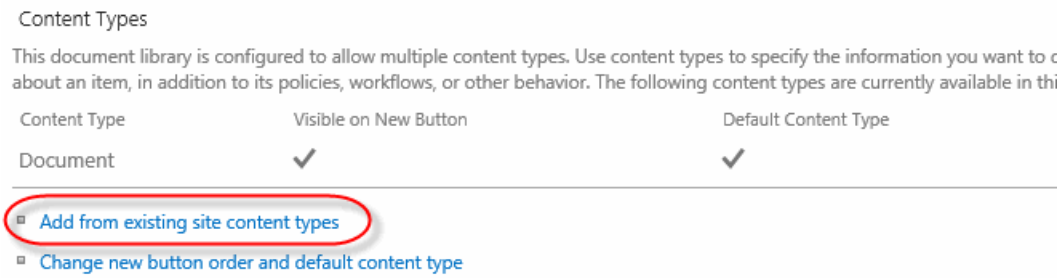
D. Click the **Yes** option under the label **Allow management of content types?** and then click the **OK** button at the bottom of the page to save your change.



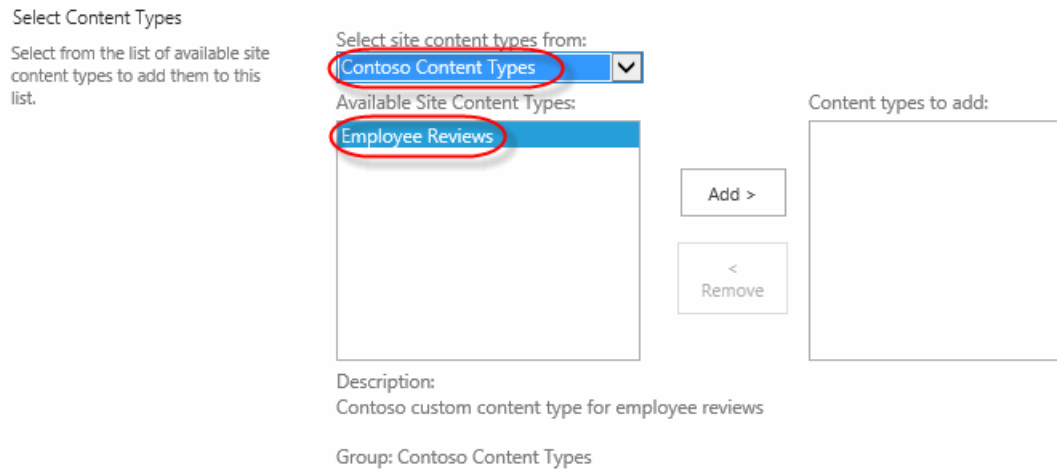
E. You should now see a **Content Types** region that was not being displayed before you made the change in the previous step.



F. Click the **Add from existing site content types** link at the bottom of the **Content Types** region.



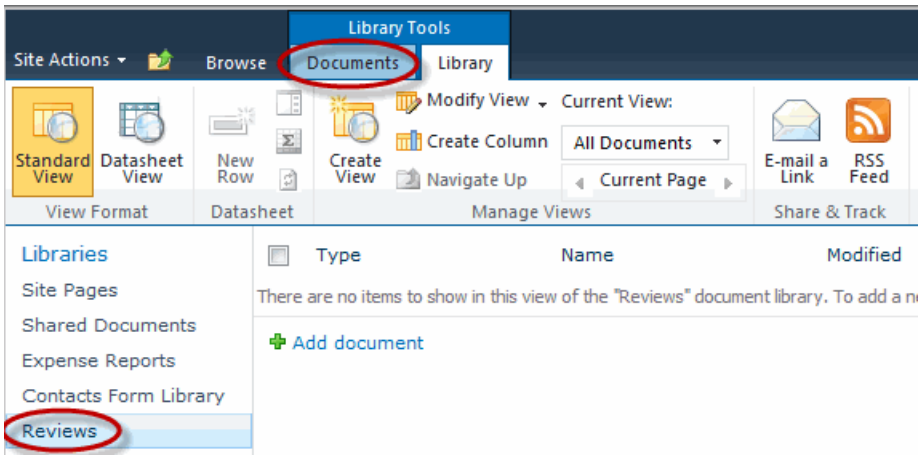
G. In the **Add Content Types** form select **Contoso Content Type** in the drop-down box labeled **Select site content types from**. Select **Employee Reviews** in the list box labeled **Available Site Content Types** and click the **Add** button to move it to the list box labeled **Content types to add**. Click the **OK** button to save your changes.



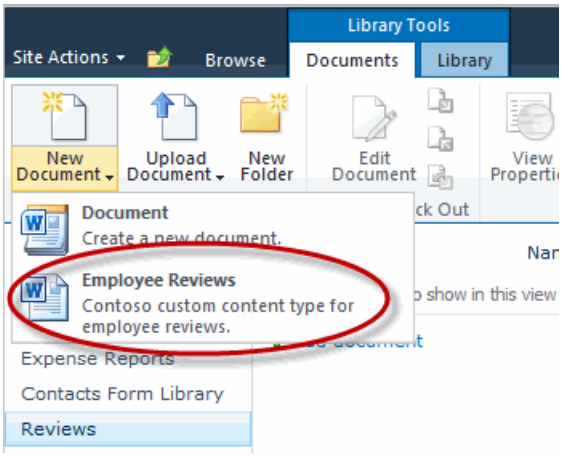
3. Add a new document to the **Reviews** library based on the **Employee Reviews** content type.

   A. Click the **Reviews** link in either the **Quick Launch** menu or the Site's **Breadcrumbs** to take you to the **Browse** view of the **Reviews** library.

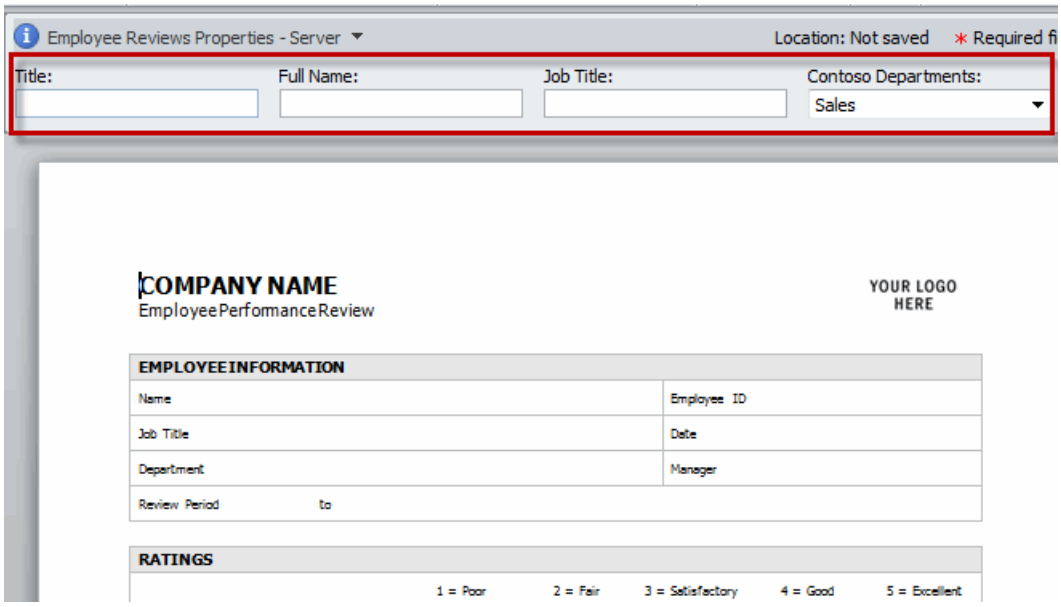
   B. Click the **Documents** tab in the **Library Tools** toolbar in the new **Reviews** document library.



   C. Click the **New Document** text and arrow, careful not to click the icon above, and note that now there are two choices of document types to create. Click the **Employee Reviews** link.



D. Microsoft Word will open a new document based on the template you loaded into the **Employee Reviews** content type.

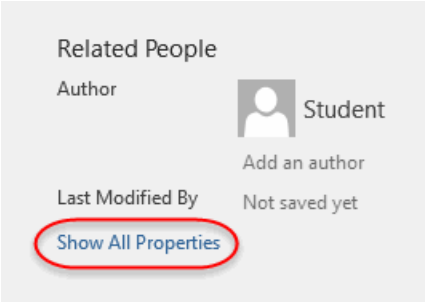


Note

If you are using Word 2013 you will see a Document Information Panel that allows you to enter values for the SharePoint fields at the top of the document. Microsoft removed the Document Information Panel from the 2019 version of Word. In the next step you'll use the **File** tab in Word to set the SharePoint field values.

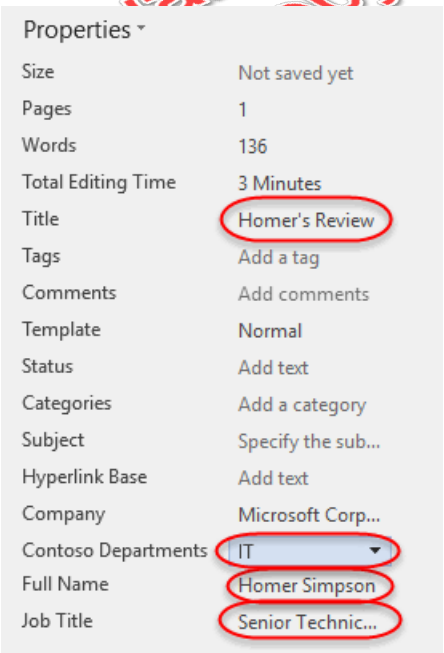
E. Click the **File** tab above the Word toolbar.

F. Click the **Show All Properties** link on the **Info** page.



G. Use the following information in the table to fill in the **Document Information Panel** fields.

Field	Data
Title:	Type “Homer’s Review”
Full Name:	Type “Homer Simpson”
Job Title:	Type “Senior Technician”
Contoso Departments:	Select **IT**

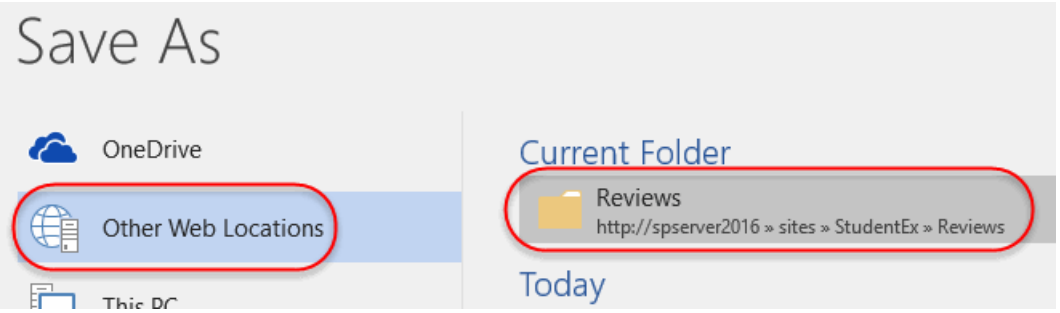


H. Use the **Back** arrow in the top left corner of the **Info** page to navigate back to the editing view of the document.

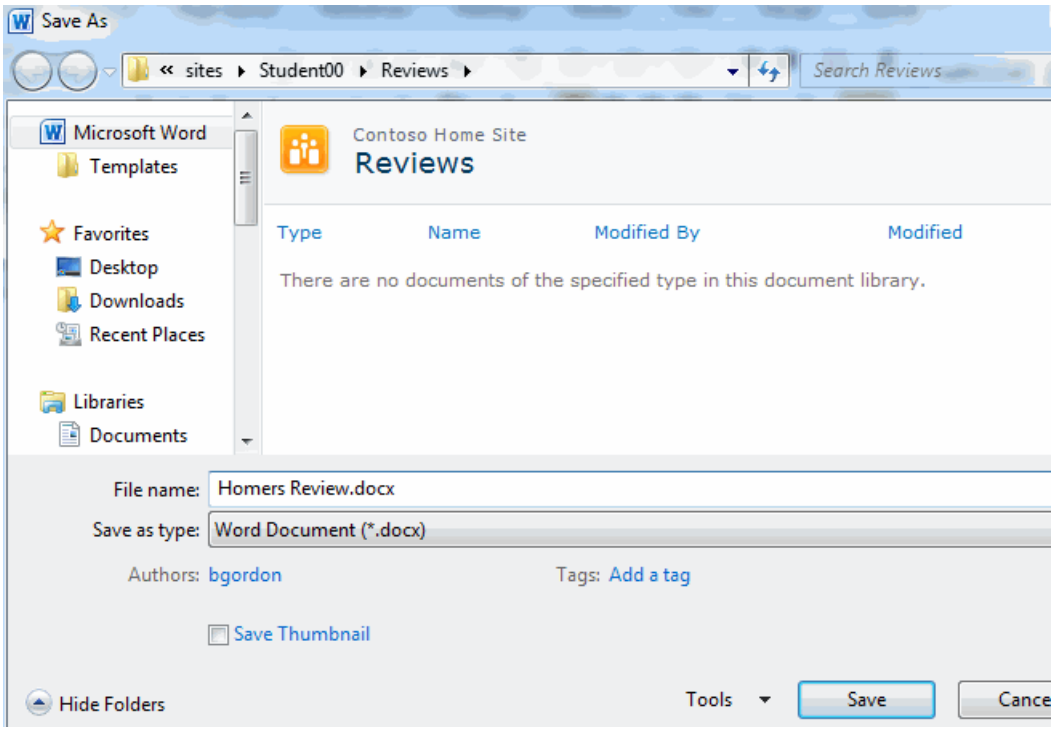
I. In the document body, change the title text “Company Name” to “Contoso”. Feel free to fill out any additional information in the document you like.

J. Click the **Save** icon in the top left corner of the Microsoft Word window.

K. Click the **Other Web Locations** link and then click the **Reviews** option under the **Current Folder** heading in the **Save As** view in Word.

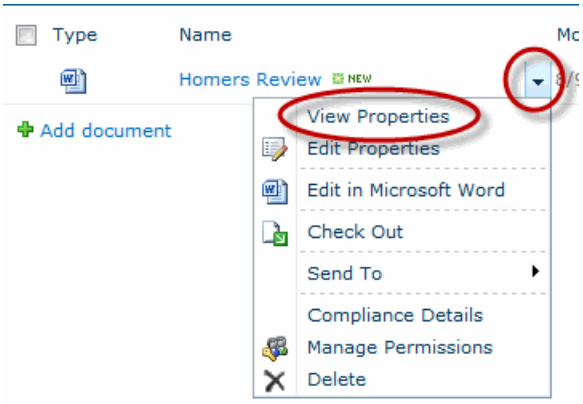


L. In the **Save As** dialog window, enter `Homers Review.docx` for the document file name and click the **Save** button.

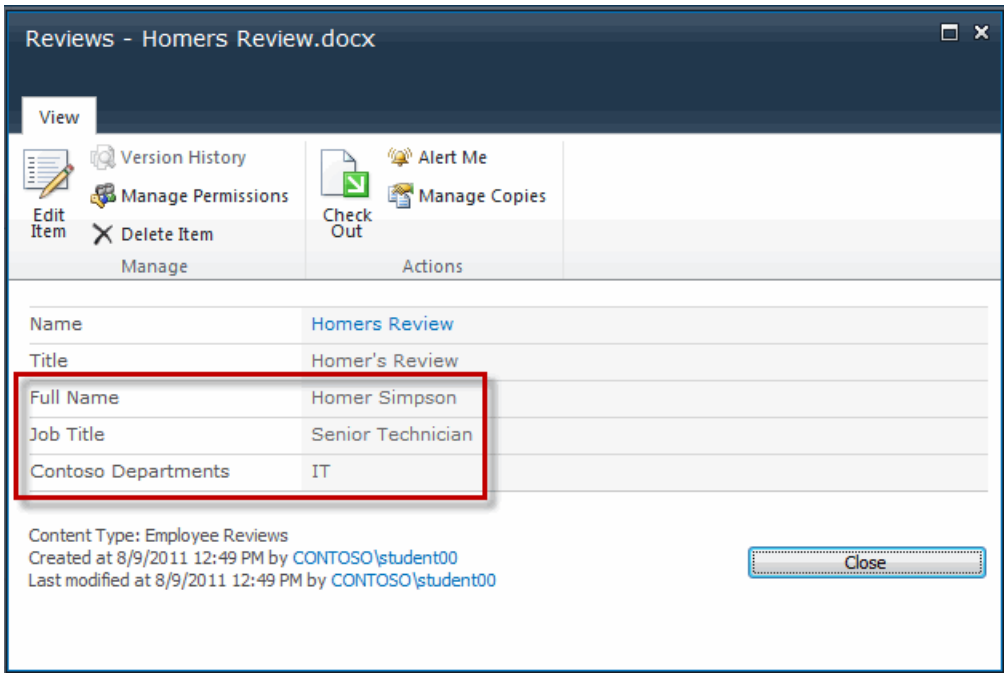


M. Close Microsoft Word.

N. Click the ellipsis next to **Homer’s Review** item then click the second ellipsis in the balloon pop-up. From the drop-down menu, select the **Properties** link.



O. Note the properties that are displayed especially the properties that were added by the **Employee Reviews** content type. These properties represent additional meta data that is stored by SharePoint outside the document itself.



P. Click the **Cancel** button to close the properties window for **Homer's Review**.

Conclusion

In this lesson, you have learned:

- About Site Columns.
- About Content Types.
- How to create Site Columns.
- How to create Content Types.
- How to create a document template for a Content Type.
- How to assign a Content Type to a list or library.
- How to create new items based on a custom Content Type.

LESSON 9
Office Integration

Topics Covered

☑ Creating a list from an Excel spreadsheet.

☑ Updating a spreadsheet view of SharePoint list data.

☑ Creating an alert.

☑ Subscribing and viewing an RSS feed from a SharePoint list.

☑ Making a copy of a library in Outlook.

☑ Using the Datasheet view.

☑ Opening and editing a list in Access.

Introduction

One of the nice features of SharePoint is its ability to integrate with Microsoft Office applications. Just about every Office application offers some level of integration with SharePoint whether it be simple, such as using an Excel spreadsheet to create a new list, or more full featured, such as Outlook integration. Some integration features enhance what is available online through a browser while others allow access to SharePoint content offline such as a mobile computer environment. This lesson will use a series of walk-throughs and exercises to show how each Office application can integrate with SharePoint.

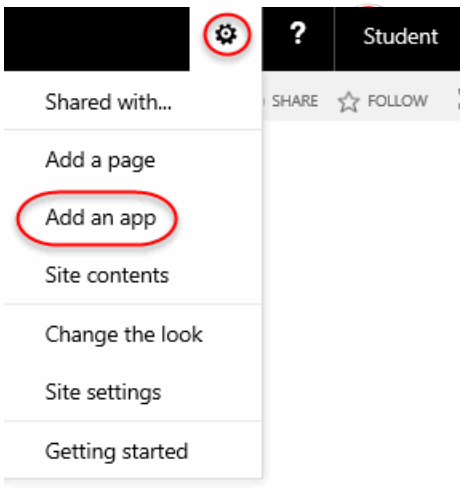
Note that this chapter is exploring integration with Office locally installed on the machine connecting to SharePoint. Office Online Server is a browser based version of Office that allows you to create and modify office documents. With SharePoint 2016 Office Online Server can be integrated and is considered an essential piece for many SharePoint installations. That being said, since it is a separate product from SharePoint it is not covered as part of this course.

9.1. Excel Integration

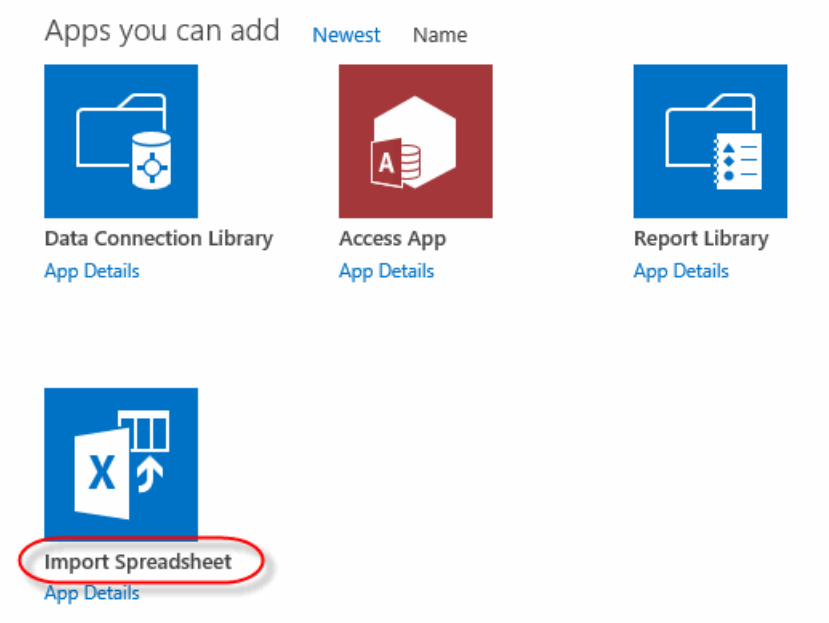
❖ 9.1.1. Import Excel Spreadsheet to List

This walk-through will show you how to import data from an Excel spreadsheet and create a new SharePoint list.

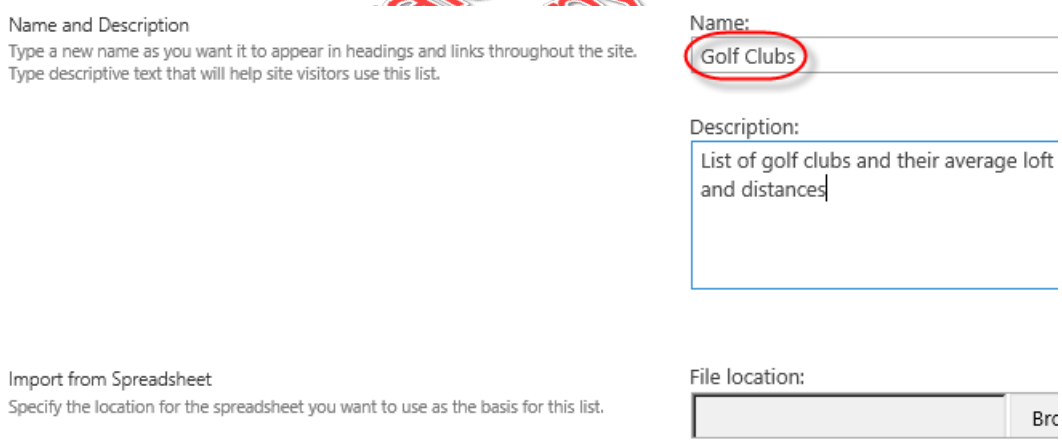
1. Create a new list by using the **Import Spreadsheet** template.
   A. Click the **Settings** menu and then choose the **Add an app** link.



   B. Locate the **Import Spreadsheet** App template and click the link.



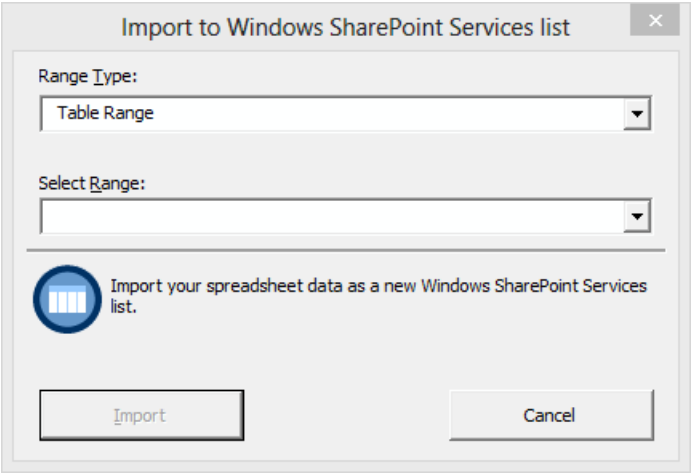
C. In the new list form that opens enter `Golf Clubs` in the **Name** field and `List of golf clubs and their average loft angle and distances` in the **Description** field.



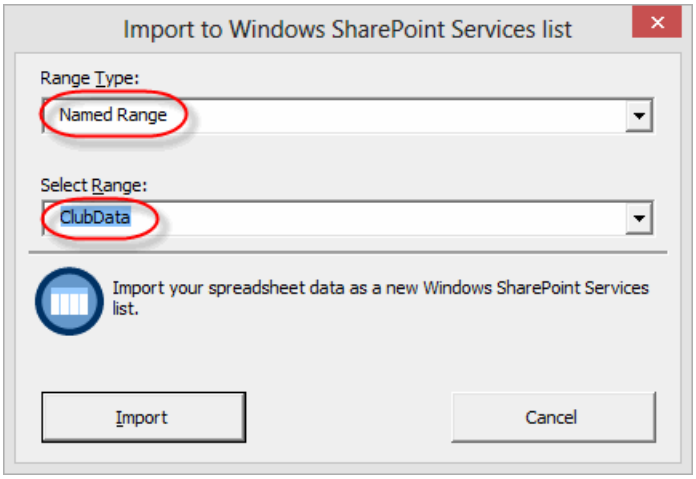
D. Click the **Browse** button to select the spreadsheet for the import.

E. In the **Choose File to Upload** dialog window, browse to the folder you downloaded the class files to and select the `club-specs.xlsx` file. Click the **Open** button to close the dialog window and complete the selection.

F. Click the **Import** button. This should open Microsoft Excel with the selected file loaded. A second dialog window titled **Import to Windows SharePoint Services list** should also open as shown in the following image.



G. In the **Range Type** drop-down, select **Named Range** and in the **Select Range** drop-down field choose **ClubData** from the list.



Note

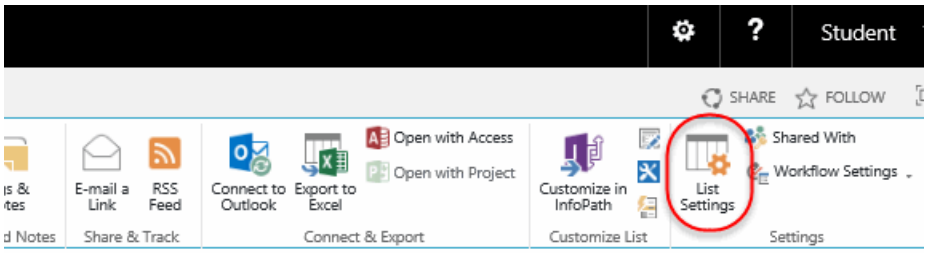
Optionally you could choose **Range of Cells** from the **Range Type** field. This would then allow you to use your mouse to click and drag across your spreadsheet selecting the range of cells to import. Having a named table as you do in this example makes it a bit easier to just select the table.

H. Click the **Import** button to complete the import process.

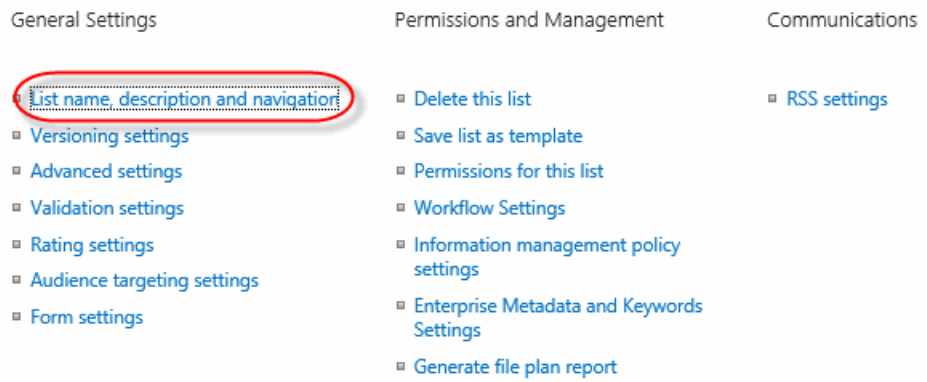
2. Add the new imported list to the **Quick Launch** menu.

A. Note how the new list “Golf Clubs” does not have a link in the **Quick Launch** menu. The **Import Spreadsheet** template you used does not have an option to add the list to the **Quick Launch** menu as part of the import and creation process.

B. Click the **List** tab to open the toolbar and click the **List Settings** link button.

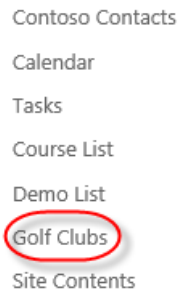


C. Click the **List name, description and navigation** link under the **General Settings** group on the **List Settings** page.



D. Click the **Yes** option under the section **Display this list on the Quick Launch?** and then click the **Save** button to save your changes.

E. Note how now there is a new link **Golf Clubs** under the **Lists** group within the **Quick Launch** menu.



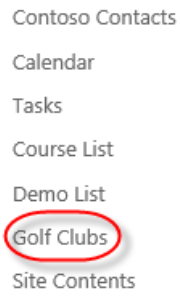
Note

The text for the link in the **Quick Launch** menu is based on the title of the list. The lists title can be changed on the **Site Settings** page using the same **List name, description, and navigation** link used to add the list to the **Quick Launch.**

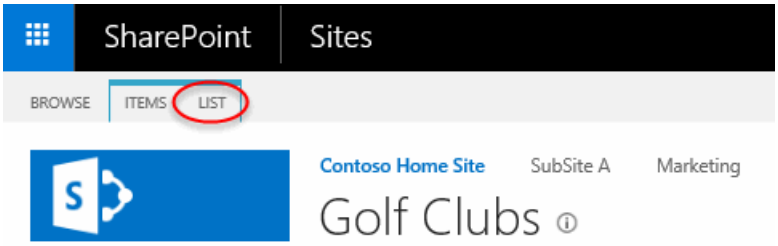
❖ 9.1.2. Export List Data to Excel

This walk-through will show you how to export the list data from the **Golf Clubs** list to an Excel spreadsheet. It does not matter that the data originally came from an Excel spreadsheet; you could perform these steps on any list. The walk-through does require that you have done the previous walk-through to create the **Golf Clubs** list.

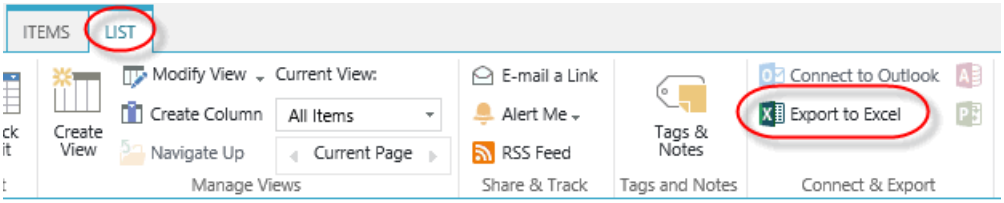
1. Export the **Golf Clubs** list to Microsoft Excel.
   A. Open your browser if it is not already open and navigate to your root team site.
   B. Click the **Golf Clubs** link in the **Quick Launch** menu to navigate to the list.



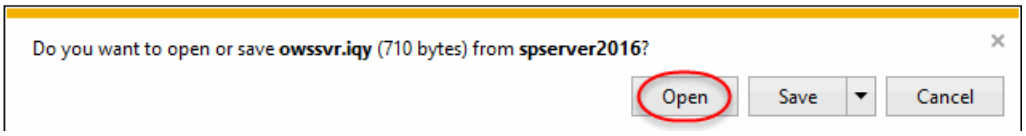
   C. Click the **List** tab to open the toolbar.



D. Click the **Export to Excel** in the **Connect & Export** area of the **List** tab toolbar.



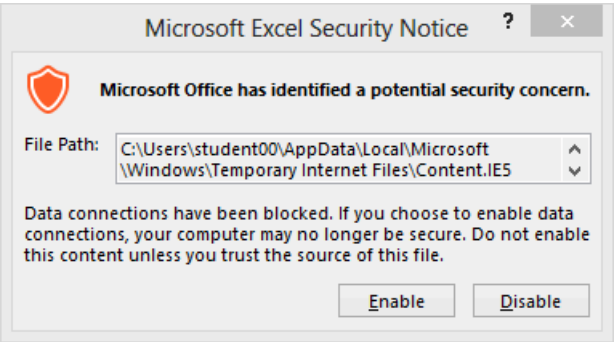
E. In the **Open or Save** dialog, click the **Open** button to open the `owssvr.iqy` file.



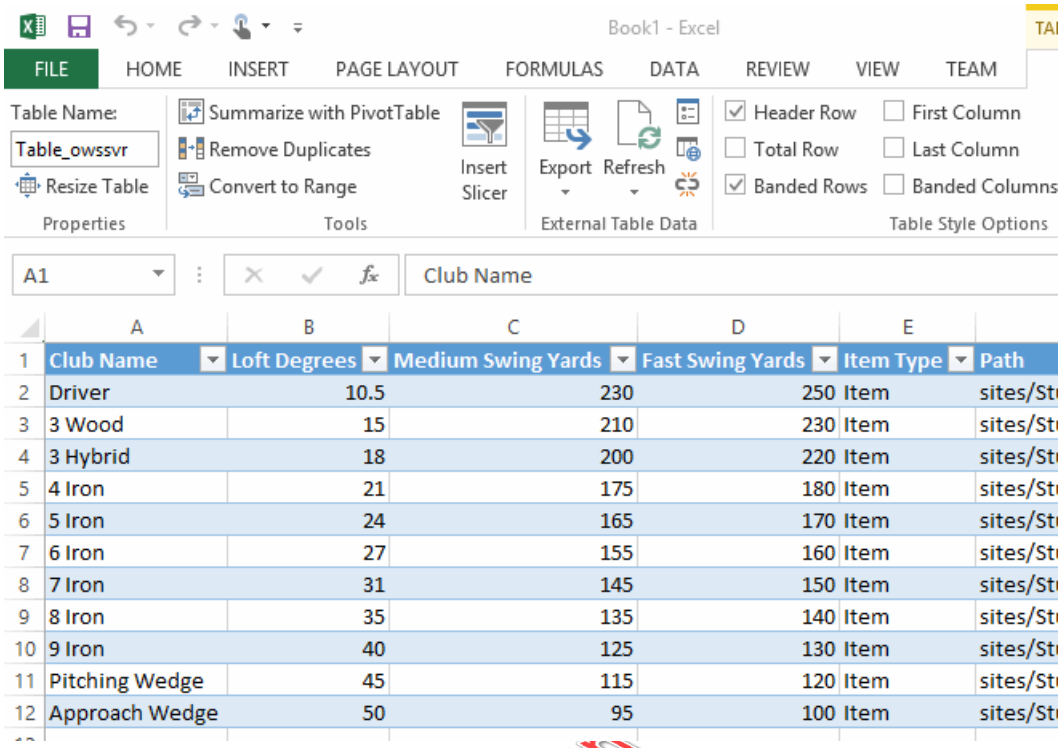
Note

The image shows the dialog you get from IE 11.

F. Click the **Enable** button on the **Microsoft Excel Security Notice** dialog window to enable the data connection back to the SharePoint server.



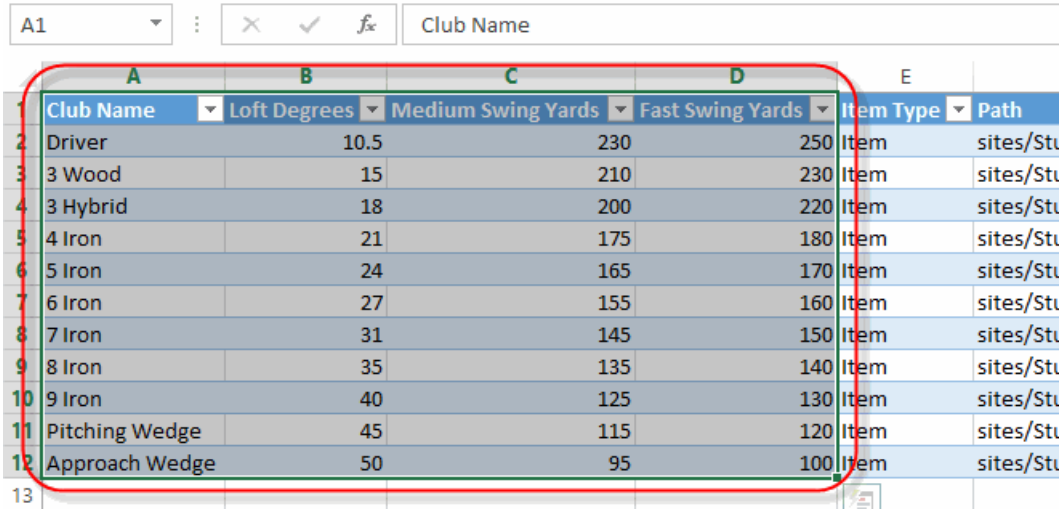
G. Microsoft Excel will open with the **Golf Clubs** list data in a linked spreadsheet. Note that the link is one way. You can only get updates from the SharePoint server, and any changes you make to the spreadsheet data do not sync back to the list in the site.



	A	B	C	D	E	
1	Club Name	Loft Degrees	Medium Swing Yards	Fast Swing Yards	Item Type	Path
2	Driver	10.5	230	250	Item	sites/St
3	3 Wood	15	210	230	Item	sites/St
4	3 Hybrid	18	200	220	Item	sites/St
5	4 Iron	21	175	180	Item	sites/St
6	5 Iron	24	165	170	Item	sites/St
7	6 Iron	27	155	160	Item	sites/St
8	7 Iron	31	145	150	Item	sites/St
9	8 Iron	35	135	140	Item	sites/St
10	9 Iron	40	125	130	Item	sites/St
11	Pitching Wedge	45	115	120	Item	sites/St
12	Approach Wedge	50	95	100	Item	sites/St

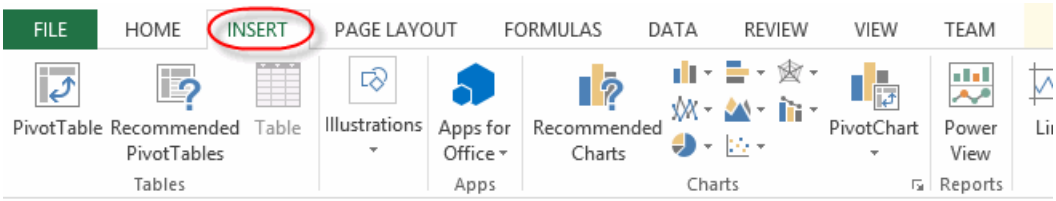
2. Create a chart of the **Golf Clubs** list data.

   A. Inside the Excel spreadsheet, select the **Club Name** column heading then click and drag your mouse over the data and stop on the **Fast Swing Yards** column and the last row. The selected region should look like the following image. Note that you are including the column headings in our selection.

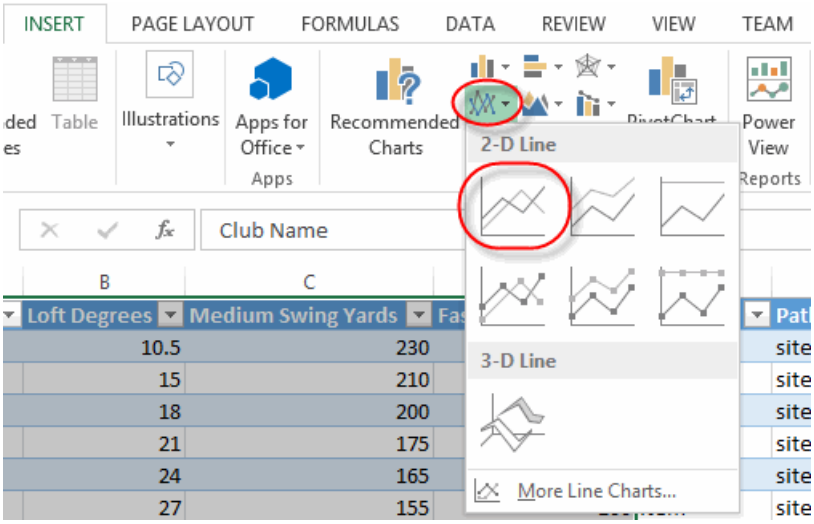


	A	B	C	D	E	
1	Club Name	Loft Degrees	Medium Swing Yards	Fast Swing Yards	Item Type	Path
2	Driver	10.5	230	250	Item	sites/Stu
3	3 Wood	15	210	230	Item	sites/Stu
4	3 Hybrid	18	200	220	Item	sites/Stu
5	4 Iron	21	175	180	Item	sites/Stu
6	5 Iron	24	165	170	Item	sites/Stu
7	6 Iron	27	155	160	Item	sites/Stu
8	7 Iron	31	145	150	Item	sites/Stu
9	8 Iron	35	135	140	Item	sites/Stu
10	9 Iron	40	125	130	Item	sites/Stu
11	Pitching Wedge	45	115	120	Item	sites/Stu
12	Approach Wedge	50	95	100	Item	sites/Stu
13						

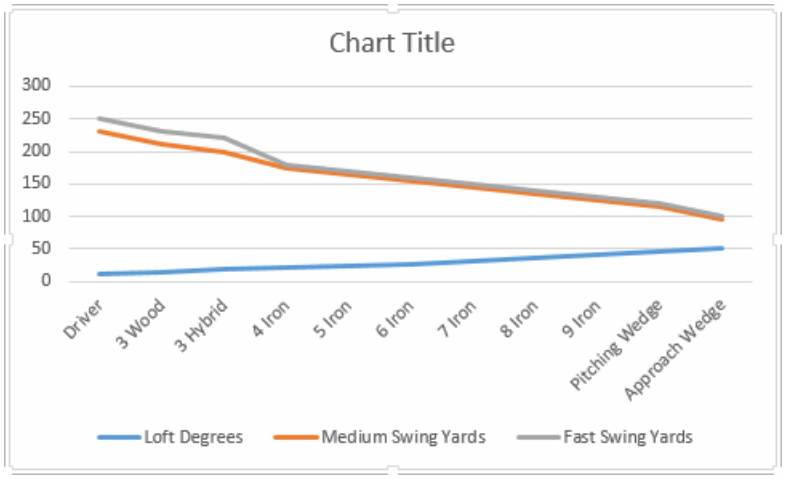
B. With the two data columns selected, click the **Insert** tab on the Excel toolbar.



C. Click the **Line** drop-down menu in the **Charts** region of the Excel **Insert** tab toolbar and click the first **2-D Line** option.



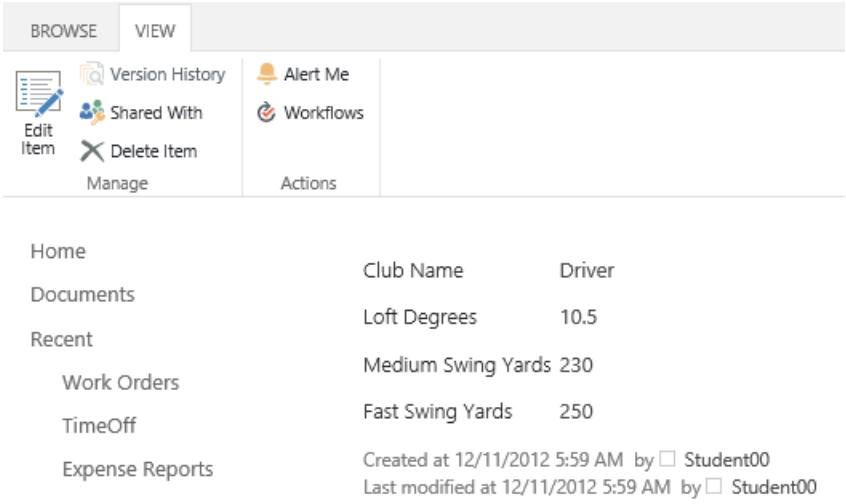
D. There should now be a 2D line chart of the **Golf Clubs** data displayed in the center of your spreadsheet.



3. Update the **Golf Clubs** list data and sync the updates to the linked Excel spreadsheet.

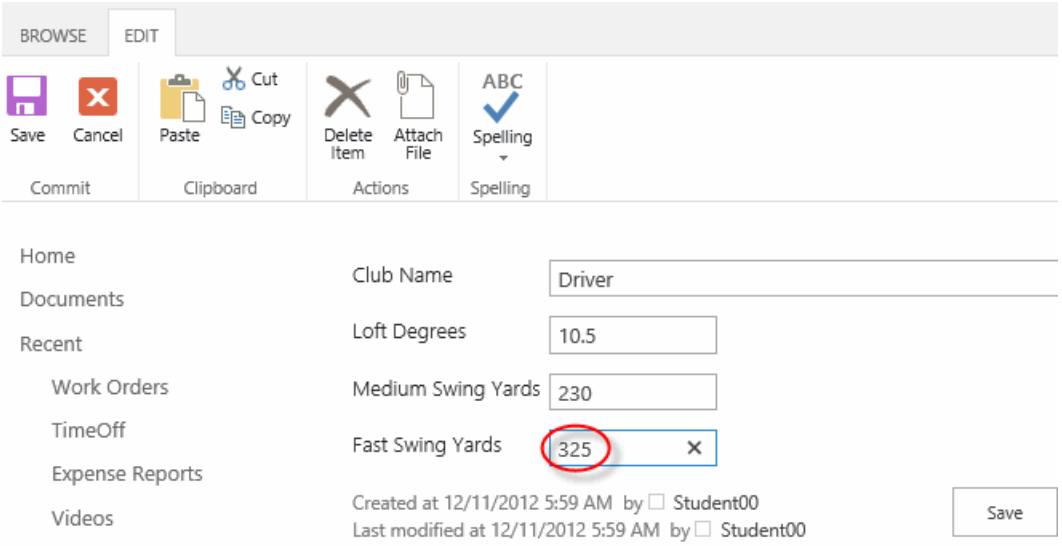
   A. Go back to your browser window with the **Golf Clubs** list **All Items** view showing.

   B. Click the **Driver** link to open the item's properties form.



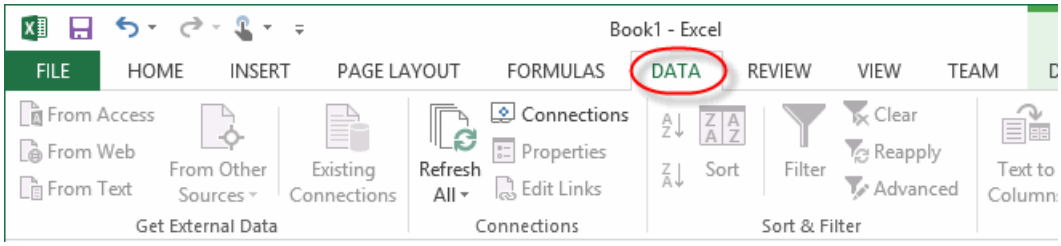
   C. Click the **Edit Item** link on the **Driver** properties form.

   D. Change the **Fast Swing Yards** field of the **Driver** to "325" and click the **Save** button to save the change.

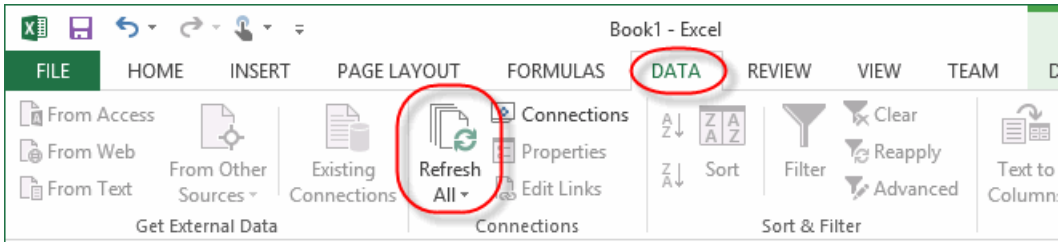


   E. Click back in your Excel window to bring the it back to the foreground.

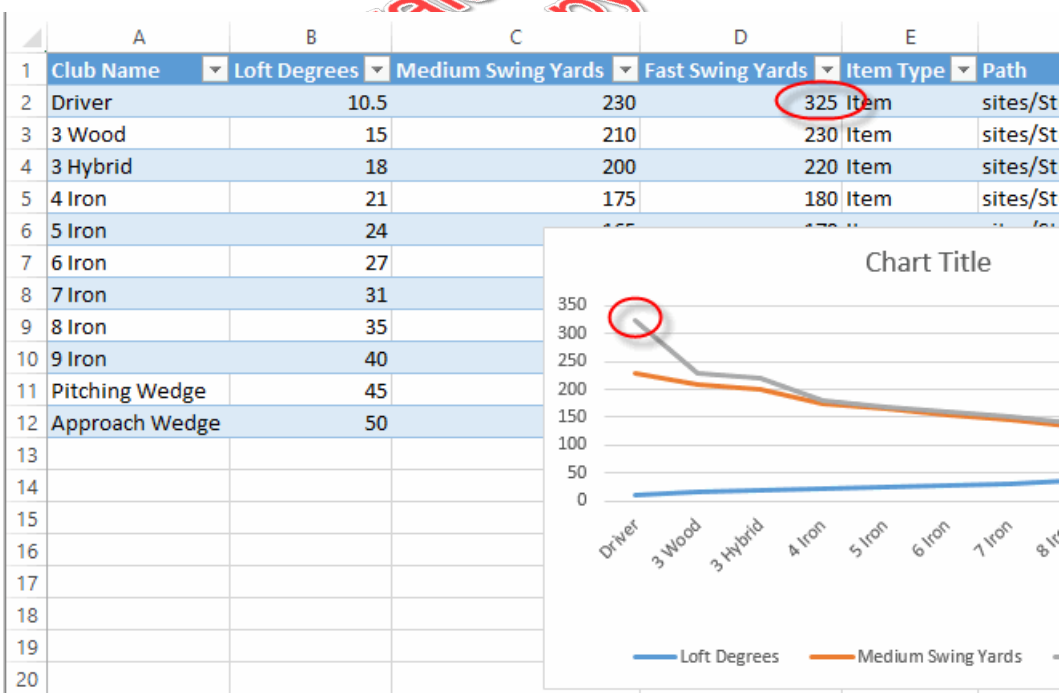
   F. Click the **DATA** tab in Excel to open the toolbar.



G. Click the **Refresh All** button in the **Connections** region of the **Data** tab toolbar.



H. The Excel spreadsheet and chart should now reflect the changes we made to the list.



	A	B	C	D	E	
1	Club Name	Loft Degrees	Medium Swing Yards	Fast Swing Yards	Item Type	Path
2	Driver	10.5	230	325	Item	sites/St
3	3 Wood	15	210	230	Item	sites/St
4	3 Hybrid	18	200	220	Item	sites/St
5	4 Iron	21	175	180	Item	sites/St
6	5 Iron	24				
7	6 Iron	27				
8	7 Iron	31				
9	8 Iron	35				
10	9 Iron	40				
11	Pitching Wedge	45				
12	Approach Wedge	50				
13						
14						
15						
16						
17						
18						
19						
20						

I. Close Microsoft Excel and click **Don't Save** when asked if you want to save the changes to 'Book1'.

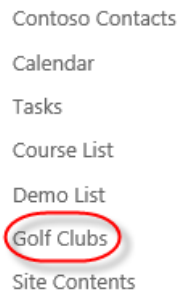
9.2. Outlook Integration

❖ 9.2.1. Create an Alert

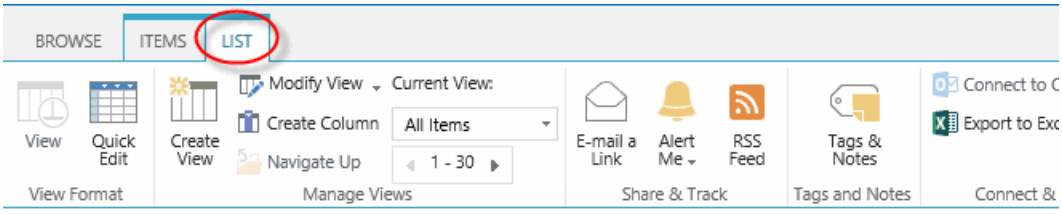
This walk-through will show you how to create an alert in the **Golf Clubs** list to notify you when the list is changed. The demonstration requires that you have done the earlier demonstration that created the **Golf Clubs** list.

Note
This walk-through will only work if your SharePoint server is configured with an email server it can deliver to and the account you are logged in with has a valid email address.

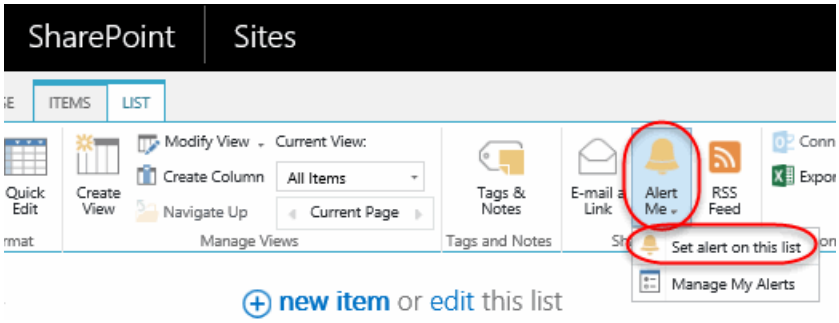
1. Create an alert for the **Golf Clubs** list.
   A. Open your browser if it is not already open and navigate to your root team site.
   B. Click the **Golf Clubs** link in the **Quick Launch** menu to navigate to the list.



   C. Click the **List** tab in the **List Tools** toolbar.



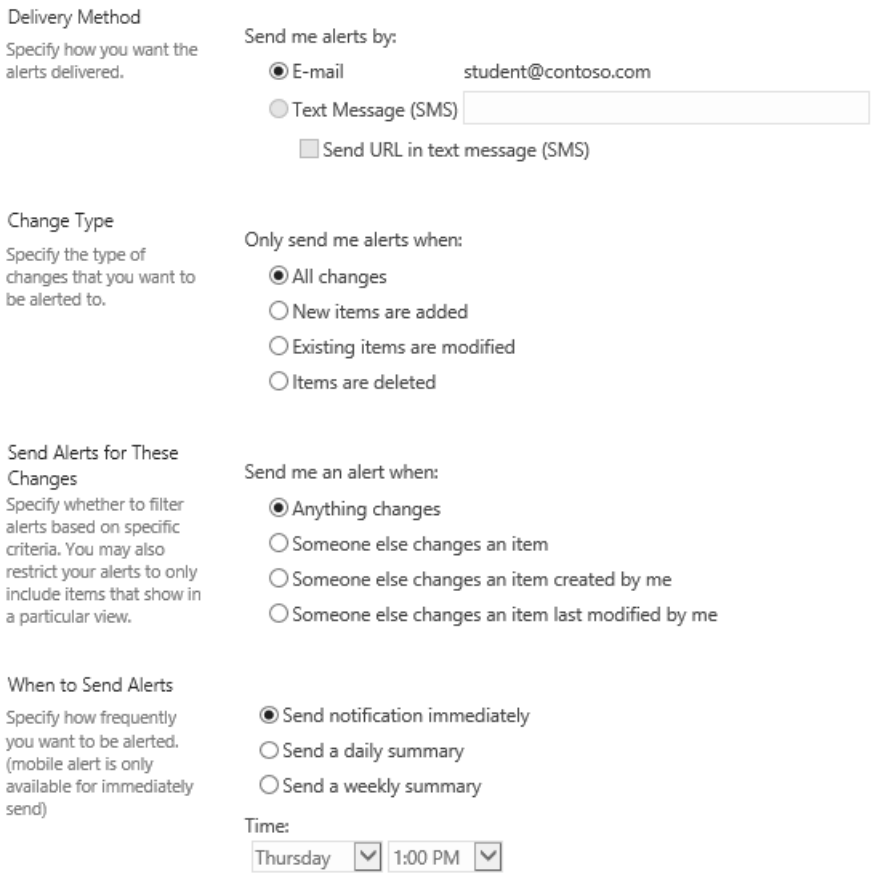
D. Click the **Alert Me** drop-down button in the **Share & Track** region on the **List** tab toolbar and select the **Set alert on this list** option.



Note

The **Alert Me** button only displays if the Farm administrator has configured the server with an outgoing mail server address.

E. Leave all the default options in the **Golf Clubs - New Alert** dialog form and click the **OK** button to save the new alert.



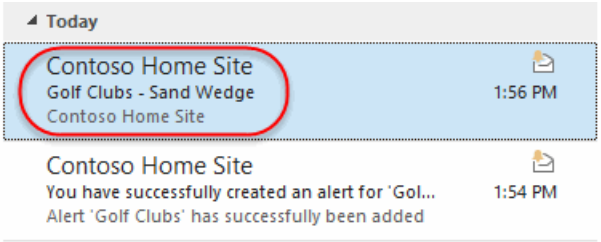
2. Add a new **Golf Clubs** item to the list to test the new alert.

   A. Click the **new item** link at the top of the list.

   B. Enter the following values for new Favorite Car item and click the **Save** button to save the data back to the list.

Club Name	Loft Degrees	Medium Swing Yards	Fast Swing Yards
Sand Wedge	55	75	80

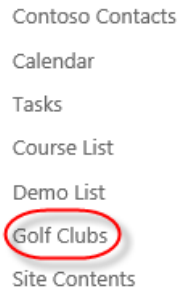
3. Check for an alert in Microsoft Outlook 2013.
   A. Launch Microsoft Outlook 2013.
   B. You will eventually have two emails in your **Inbox** generated by the alert system. It could take up to 10 minutes for them to appear due to a delay in the SharePoint service responsible for generating emails even with the alert option set to **Send notification immediately**.



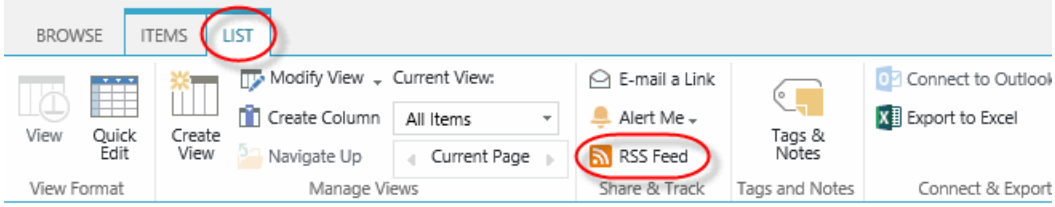
❖ 9.2.2. Subscribe to a List's RSS Feed

This walk-through will show you how to subscribe to the RSS (Really Simple Syndication) feed generated by the **Golf Clubs** list. The alert in the previous walk-through can become an annoyance with a lot of changes occurring and emails being generated. A less intrusive way of keeping up to date on lists would be to use RSS. This walk-through requires the **Golf Clubs** list created in the first walk-through in this lesson.

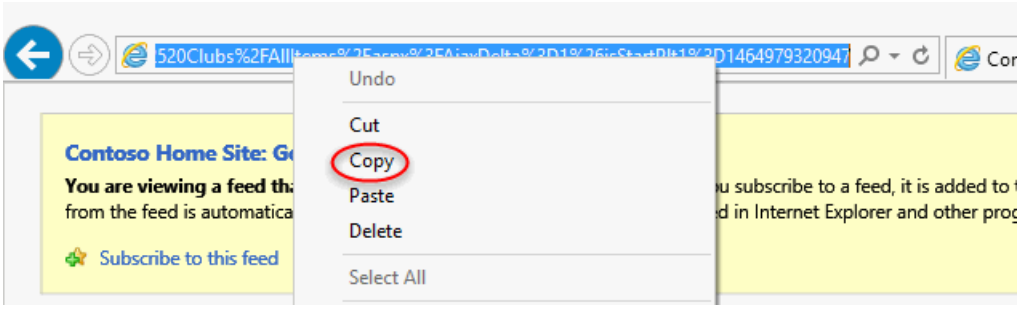
1. Subscribe to an RSS feed in the **Golf Clubs** list.
   A. Click the **Golf Clubs** link in the **Quick Launch** menu to navigate to the list.



   B. Click the **RSS Feed** button in the **Share & Track** region on the **List Tools List** tab toolbar.



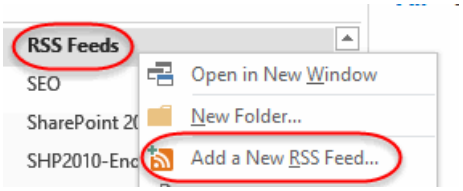
C. Right-click the URL field in the browser and choose the **Copy** option to copy the URL into the Windows clipbord.



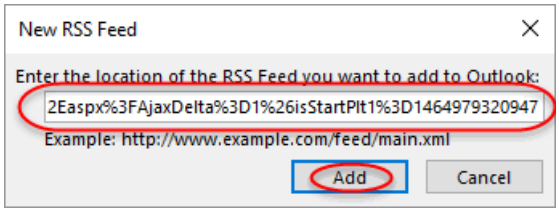
Note

The RSS page does offer a link **Subscribe to this feed** but it tends to react differently in different browsers. In Internet Explorer is will add the RSS feel to the Windows Common Feed List but with the Microsoft Edge browser it reacts differently. Manually copying the URL and pasting it into Outlook offers a more consistent method. Note that you can configure Outlook to automatically sync with the Windows Common Feed List but it is not configured that way by default.

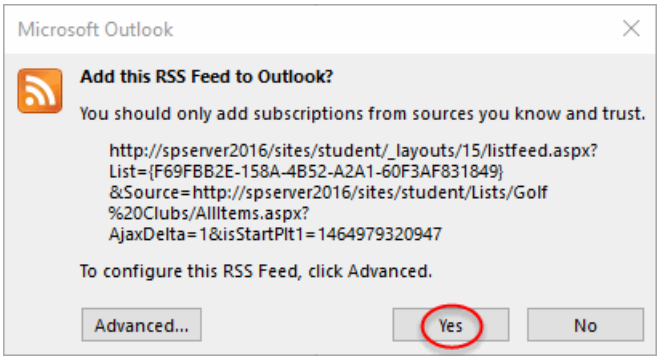
D. Switch to the Outlook window or open one if it is not already open, and right-click the **RSS Feeds** folder and choose the **Add a New RSS Feed…** option.



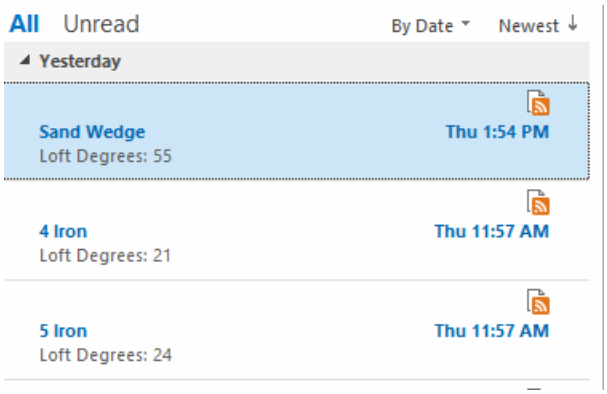
E. Type **Ctrl+V** to paste the RSS URL into the **New RSS Feed** dialog field and click the **Add** button.



F. Click **Yes** on the **Microsoft Outlook** dialog verifying you want to add the RSS feed to Outlook.



G. Verify that Outlook shows the latest items from the list in the view of the RSS Feed.

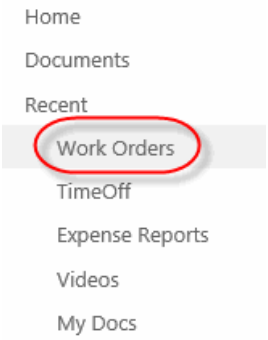


❖ 9.2.3. Connect to Outlook

This walk-through will show you how to connect a library to Outlook. Using the **Connect to Outlook** feature in SharePoint allows you to have a copy of a library and certain lists in Outlook that you can work with offline. This walk-through uses the **Work Orders** library that was created in a previous walk-through in the “Site Columns and Content Types” lesson but the same steps can be performed on any library.

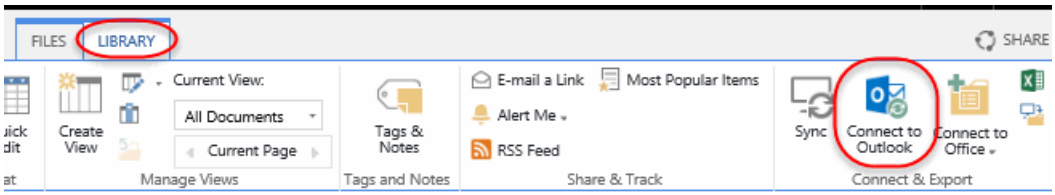
1. Connect the **Work Orders** library to Outlook.

   A. Click the **Work Orders** library on the root site's **Quick Launch** menu.



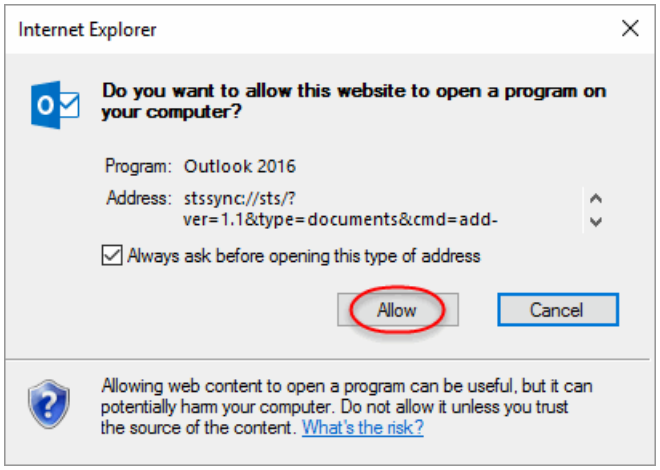
> **Note**
>
> If **Work Orders** is not listed under the **Recent** group in the **Quick Launch** menu it might be listed under **Site Contents**. The **Recent** list only displays the last five lists or libraries created.

   B. Click the **Connect to Outlook** icon in the **Connect & Export** region on the **Library** tab toolbar.

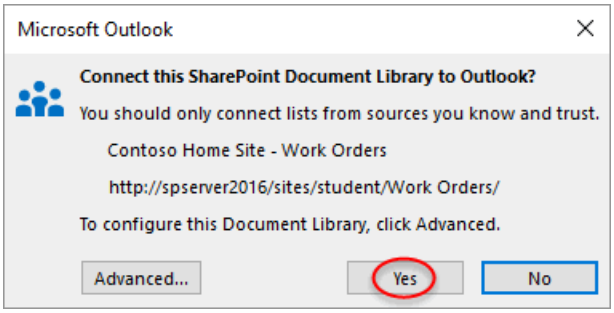


> **Note**
>
> Depending on the width of your browser screen, you may or may not see the label text "Connect to Outlook".

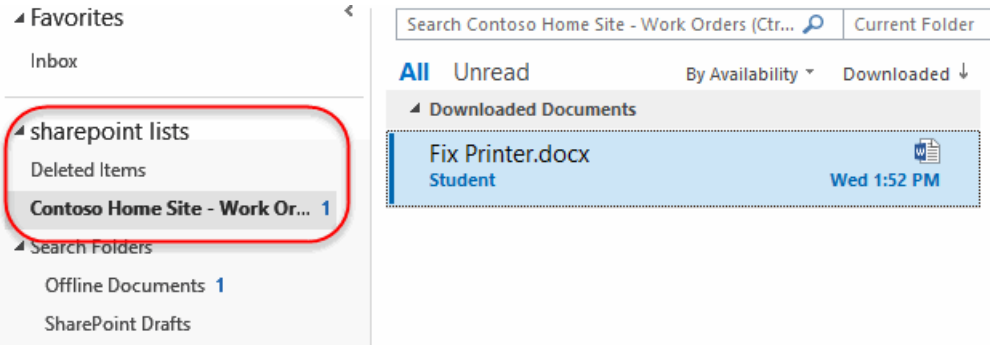
   C. In the **Internet Explorer** dialog window that asks, **Do you want to allow this website to open a program on your computer?**, click the **Allow** button.



D. In the **Microsoft Outlook** dialog window that asks, "Connect this SharePoint Document Library to Outlook?", click the **Yes** button.



E. A new **SharePoint Lists** tree menu will be added to your Outlook side bar menu with the **Work Orders** added and opened. Outlook can now be used to view, create, and edit items in the **Work Orders** library. Additionally you can work offline with this library through Outlook.

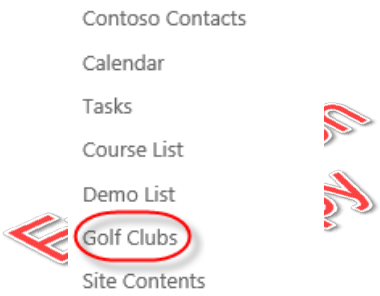


9.3. Access Integration

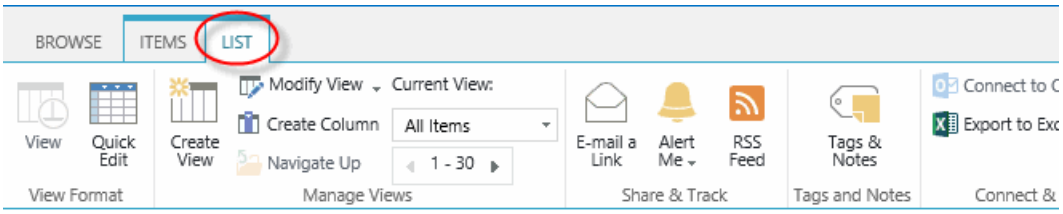
❖ 9.3.1. Open a List with Access

In this walk-through you will learn how to open a SharePoint list in Access as well as create and Access view. Unlike exporting to Excel, we can both read and update list data from Access. This walk-through uses the **Golf Clubs** list created as part of an earlier walk-through.

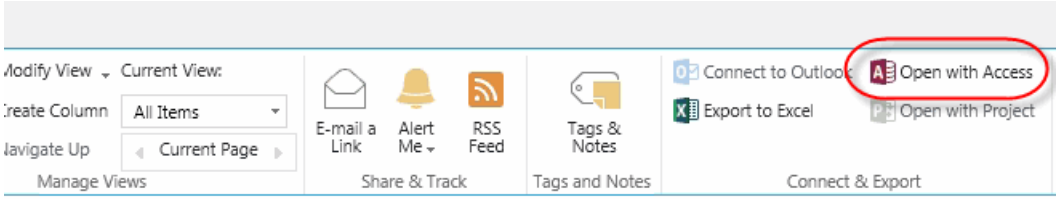
1. Open the **Golf Clubs** list in Microsoft Access.
   A. Open your browser if it is not already open and navigate to your root team site.
   B. Click the **Golf Clubs** link in the **Quick Launch** menu to navigate to the list.



   C. Click the **LIST** tab to open the toolbar.



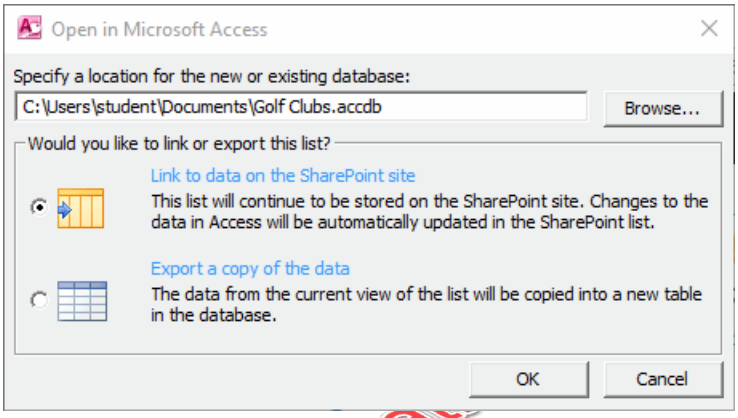
   D. Click the **Open with Access** icon in the **Connect & Export** region on the **LIST** tab toolbar.



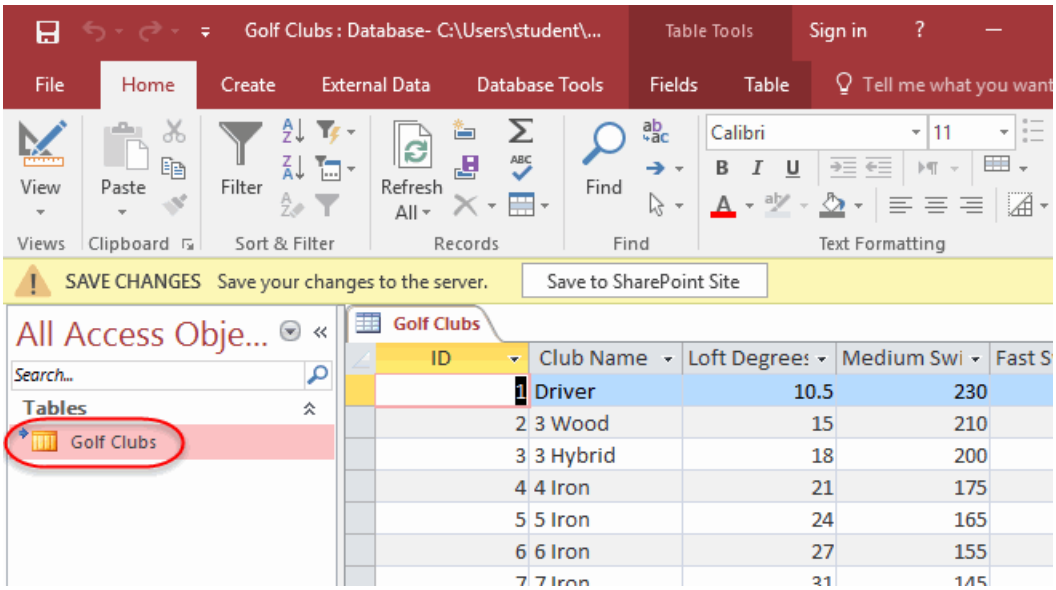
Note

Depending on the width of your browser screen, you may or may not see the label text “Open with Access”.

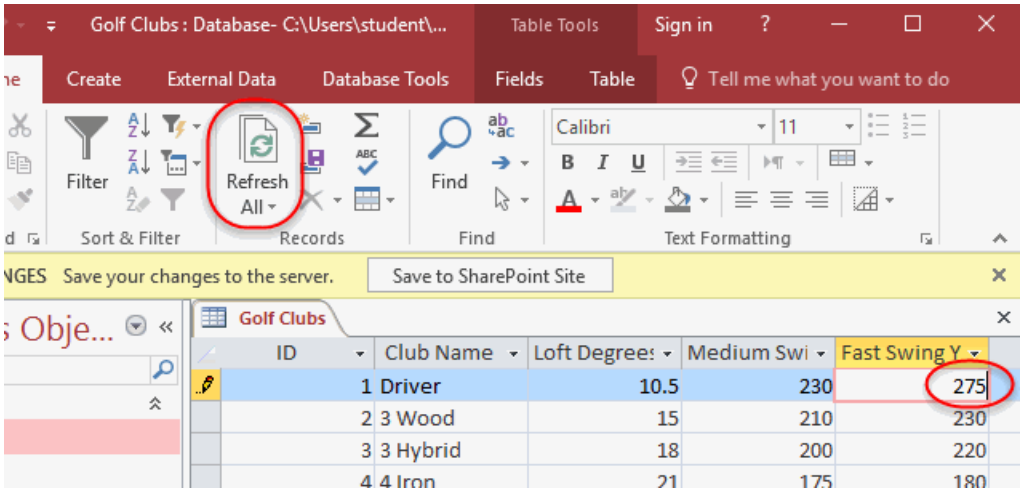
E. Leave the default settings and click the **OK** button in the **Open in Microsoft Access** dialog window.



F. In the Microsoft Access window that opens, double-click the **Golf Clubs** link in the **Tables** window to open it and view the data.



G. Modify the Driver’s **Fast Swing Yards** to be “275”. Click the **Refresh All** button in the **Home** tab on Access’s toolbar.



Note

The ribbon message with the **Save Changes** warning icon and the **Save to SharePoint Site** button is deceiving. That button will save a new Access database file back to a library on your SharePoint site; it will *not* save your changes back to the original list.

H. Go back to your browser window and refresh the **Golf Clubs** page. The **Driver** item in the browser window should now match what you changed it to in Access.

Club Name		Loft Degrees	Medium Swing Yards	Fast Swing Yards
Driver	...	10.5	230	275
3 Wood	...	15	210	230
3 Hybrid	...	18	200	220
4 Iron	...	21	175	180

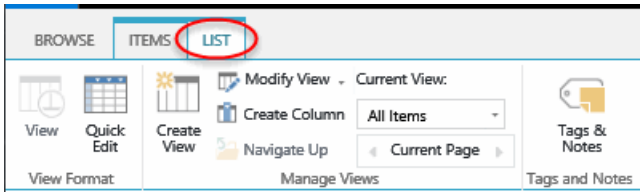
I. Try editing the **Driver Fast Swing Yards** in the browser back to “350” and saving it. Go back to the Access window and click the **Refresh All** button in the **Home** tab and verify that Access now displays “350” for the Driver **Fast Swing Yards**.

J. Close Access when you are done trying out the editing and synchronizing.

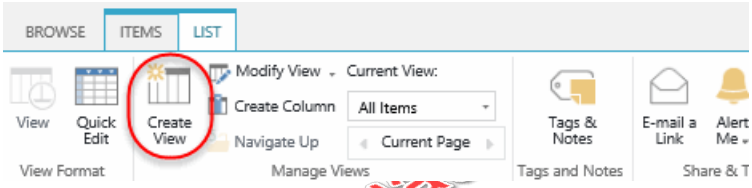
2. Create an Access View for the **Golf Clubs** list.

A. Click the **Golf Clubs** link in the **Quick Launch** menu to navigate to the list.

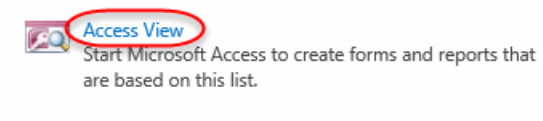
B. Click the **LIST** tab to open the toolbar.



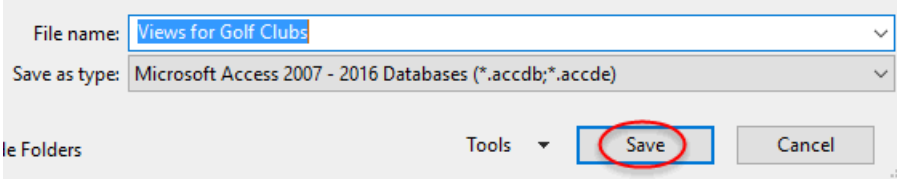
C. Click the **Create View** icon on the **List** tab toolbar.



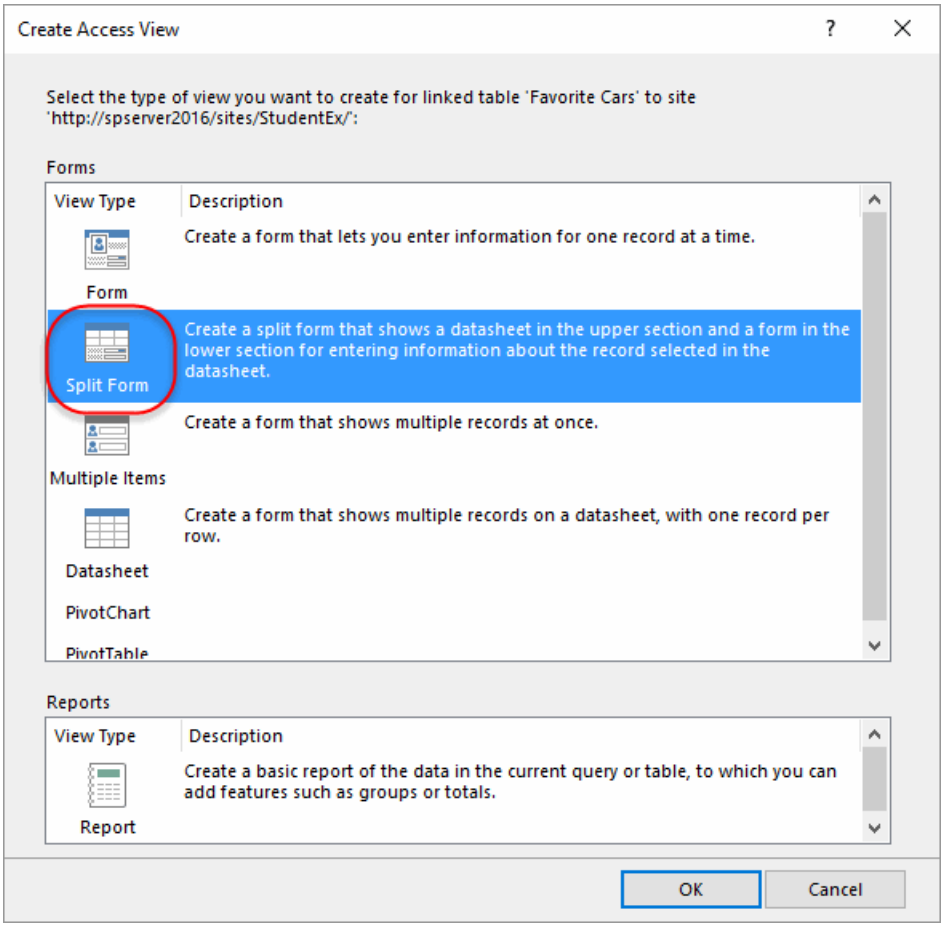
D. Click the **Access View** link from the new view selection page.



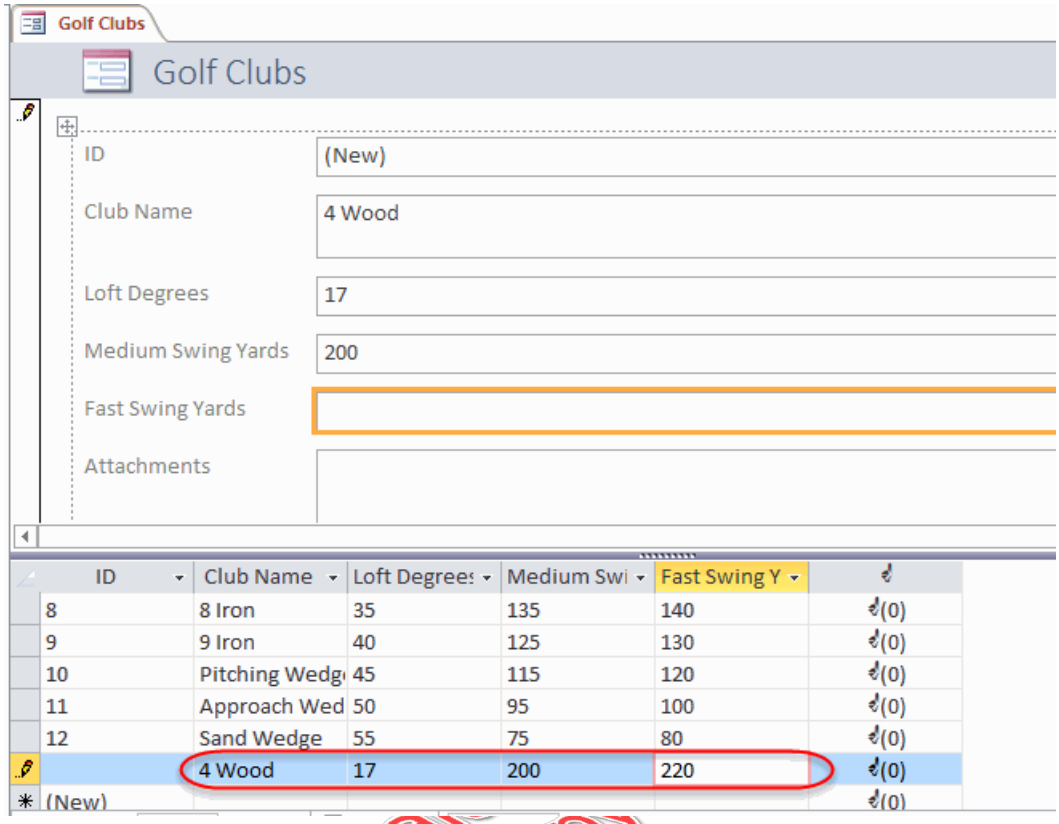
E. In the Access dialog that opens click the **Save** button to save a local copy with the new view with the default file name.



F. In the **Create Access View** dialog of choices choose the **Split Form** template and click the **OK** button.



G. Click into the **Club Name** field of the row labeled **(New)** and create a new entry in the **Golf Clubs** list by entering values for each of the fields. You can use the following screen capture for input data.

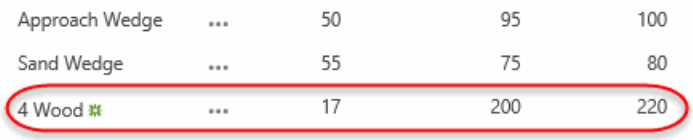


Note

Note that the fields above the datasheet are for viewing only, you cannot use them to enter data. Some of the other view templates have forms with editable fields or you can modify this view and change the fields to editable.

H. Switch back to the Internet Explorer window and click the **Golf Clubs** link in the **Quick Launch** to refresh the list.

I. Note that the entry from the Access view is automatically saved back to the SharePoint list.



J. Close Access and click the **Yes** button to save the changes.

K. Click the **OK** button on the **Save As** dialog for the form name.

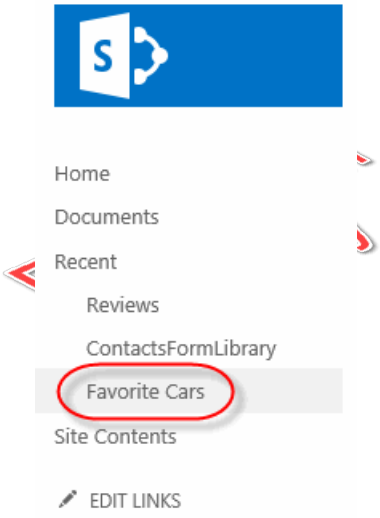
Note
Note that the Access views do not list with other custom views in the browser but you can use it by opening the Access file created when the Access View was created.

Exercise 17: Excel Integration

15 to 25 minutes

In this exercise, you will learn how to export a SharePoint list to Microsoft Excel.

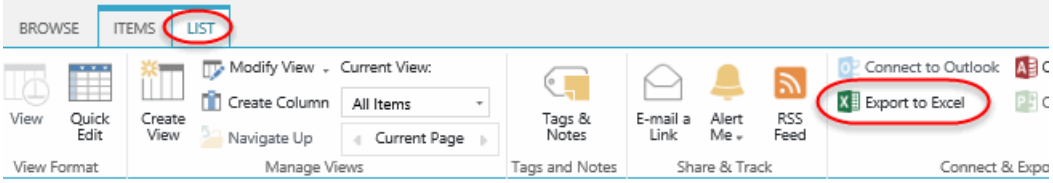
1. Export the **Favorite Cars** list to Microsoft Excel.
   A. Open your browser if it is not already open and navigate to your root team site.
   B. Click the **Favorite Cars** link in the **Quick Launch** menu to navigate to the list.



Note

If **Favorite Cars** is not listed under the **Recent** group in the **Quick Launch** menu it might be listed under **Site Contents**. The **Recent** list only displays the last five lists or libraries created.

   C. Click the **Export to Excel** in the **Connect & Export** area of the **List** tab toolbar.

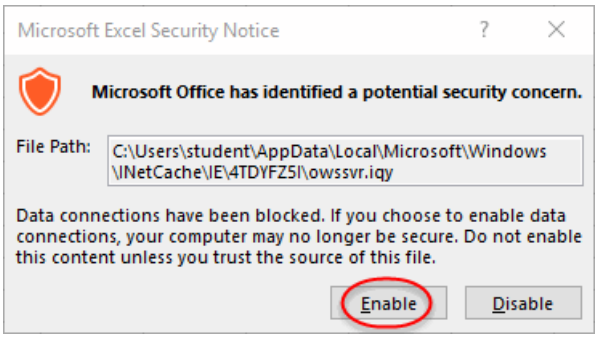


D. In the **Open or Save** dialog, click the **Open** button to open the `owssvr.iqy` file.

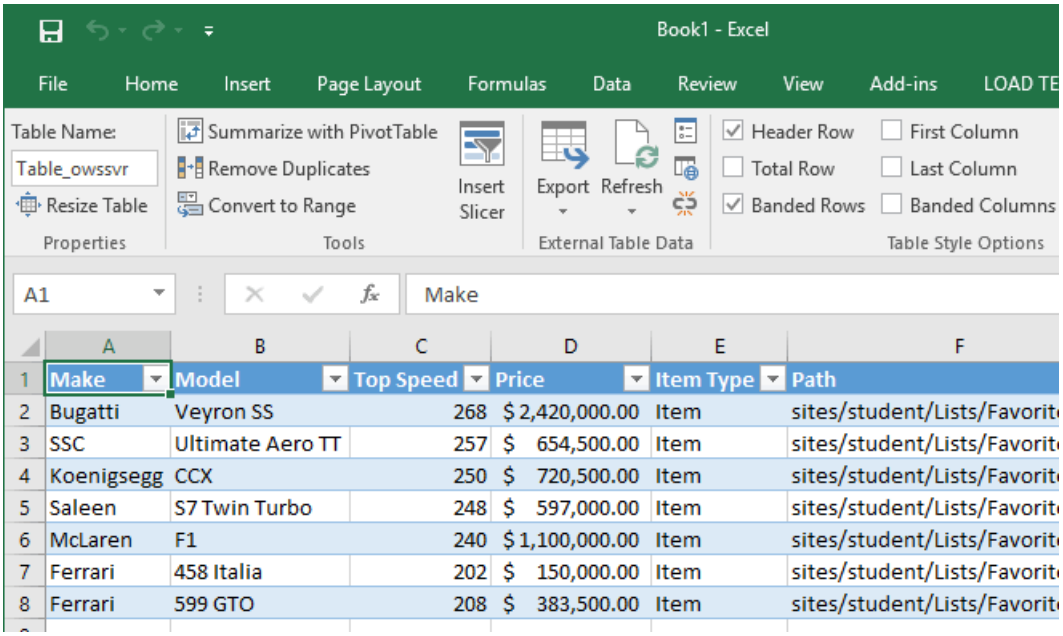
Note

The image shows the dialog you get from IE 11.

E. Click the **Enable** button on the **Microsoft Excel Security Notice** dialog window to enable the data connection back to the SharePoint server.



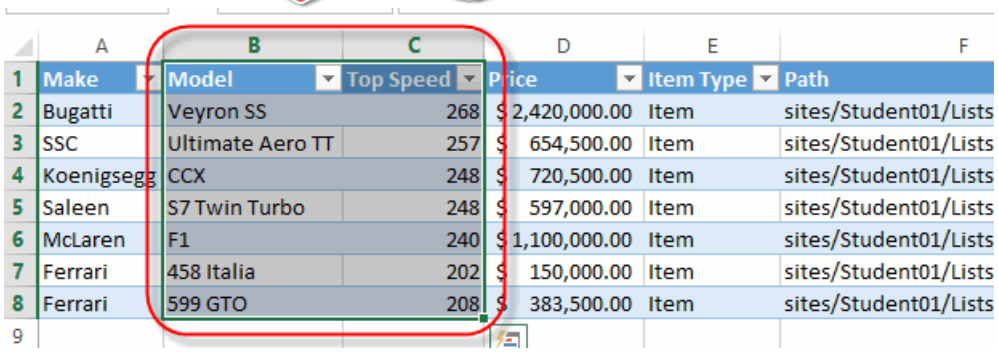
F. Microsoft Excel will open with the **Favorite Cars** list data in a linked spreadsheet. Note that the link is one way. You can only get updates from the SharePoint server; any changes you make to the spreadsheet data do not sync back to the list in the site.



	A	B	C	D	E	F
1	Make	Model	Top Speed	Price	Item Type	Path
2	Bugatti	Veyron SS	268	$ 2,420,000.00	Item	sites/student/Lists/Favorit
3	SSC	Ultimate Aero TT	257	$ 654,500.00	Item	sites/student/Lists/Favorit
4	Koenigsegg	CCX	250	$ 720,500.00	Item	sites/student/Lists/Favorit
5	Saleen	S7 Twin Turbo	248	$ 597,000.00	Item	sites/student/Lists/Favorit
6	McLaren	F1	240	$ 1,100,000.00	Item	sites/student/Lists/Favorit
7	Ferrari	458 Italia	202	$ 150,000.00	Item	sites/student/Lists/Favorit
8	Ferrari	599 GTO	208	$ 383,500.00	Item	sites/student/Lists/Favorit

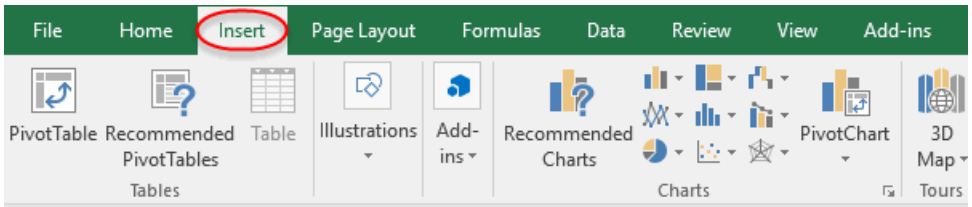
2. Create a chart of the **Favorite Cars** list data.

   A. Inside the Excel spreadsheet, select the data in both the **Model** and **Top Speed** columns by clicking and dragging your mouse over both columns of data.

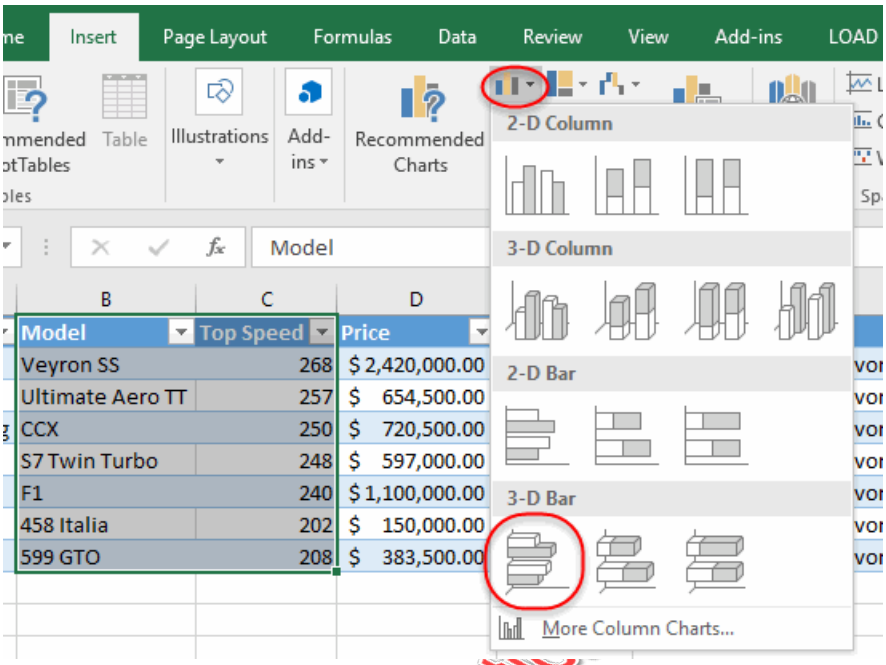


	A	B	C	D	E	F
1	Make	Model	Top Speed	Price	Item Type	Path
2	Bugatti	Veyron SS	268	$ 2,420,000.00	Item	sites/Student01/Lists
3	SSC	Ultimate Aero TT	257	$ 654,500.00	Item	sites/Student01/Lists
4	Koenigsegg	CCX	248	$ 720,500.00	Item	sites/Student01/Lists
5	Saleen	S7 Twin Turbo	248	$ 597,000.00	Item	sites/Student01/Lists
6	McLaren	F1	240	$ 1,100,000.00	Item	sites/Student01/Lists
7	Ferrari	458 Italia	202	$ 150,000.00	Item	sites/Student01/Lists
8	Ferrari	599 GTO	208	$ 383,500.00	Item	sites/Student01/Lists
9						

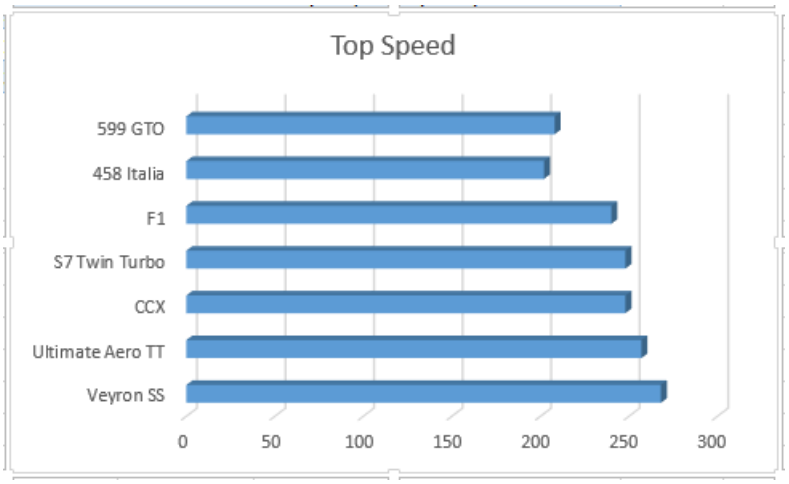
   B. With the two data columns selected, click the **Insert** tab on the Excel toolbar.



C. Click the **Bar** drop-down menu in the **Charts** region of the Excel **Insert** tab toolbar and click the **3-D Bar** option.



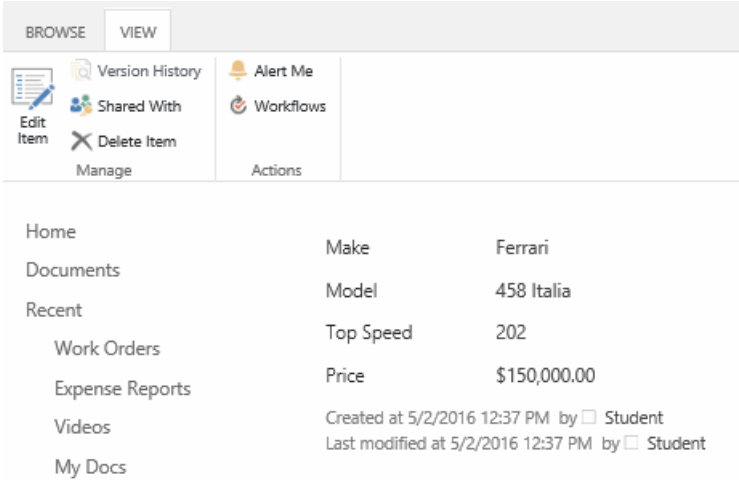
D. There should now be a 3-D chart of the **Favorite Cars** top speeds displayed in the center of your spreadsheet.



3. Update the **Favorite Cars** list data and sync the updates to the linked Excel spreadsheet.

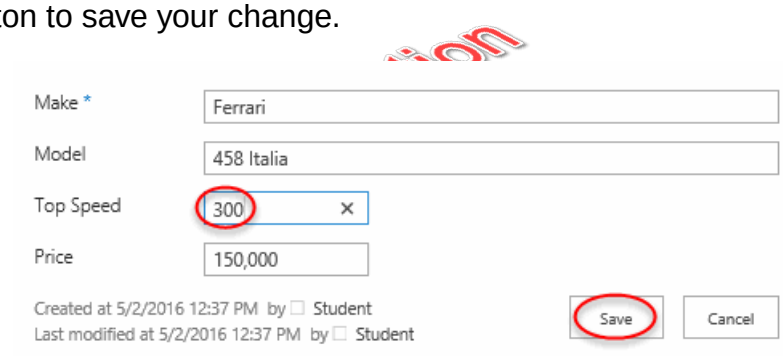
   A. Go back to your browser window with the **Favorite Cars** list **All Items** view showing.

B. Click the **Ferrari 458 Italia** link to open the item's properties form.



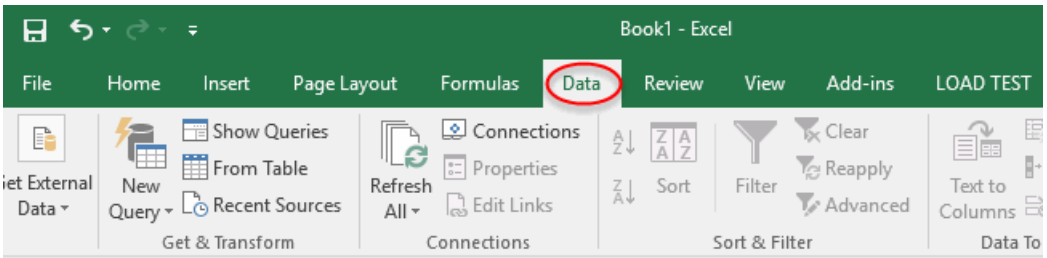
C. Click the **Edit Item** link on the **Ferrari** properties dialog form.

D. Change the **Top Speed** field of the **Ferrari** to "300" and click the **Save** button to save your change.

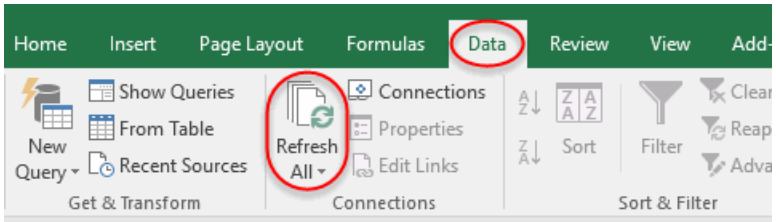


E. Click back in your Excel window to bring it back to the foreground.

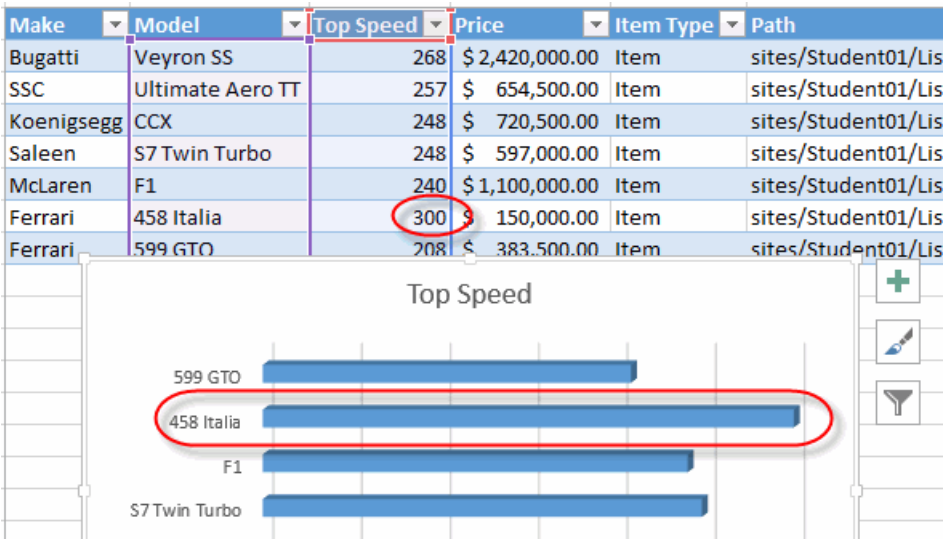
F. Click the **DATA** tab in the Excel toolbar.



G. Click the **Refresh All** button in the **Connections** region of the **DATA** tab toolbar.



H. The Excel spreadsheet and chart should now reflect the changes you made to the list.



Make	Model	Top Speed	Price	Item Type	Path
Bugatti	Veyron SS	268	$ 2,420,000.00	Item	sites/Student01/Lis
SSC	Ultimate Aero TT	257	$ 654,500.00	Item	sites/Student01/Lis
Koenigsegg	CCX	248	$ 720,500.00	Item	sites/Student01/Lis
Saleen	S7 Twin Turbo	248	$ 597,000.00	Item	sites/Student01/Lis
McLaren	F1	240	$ 1,100,000.00	Item	sites/Student01/Lis
Ferrari	458 Italia	300	$ 150,000.00	Item	sites/Student01/Lis
Ferrari	599 GTO	208	$ 383,500.00	Item	sites/Student01/Lis

I. Close Microsoft Excel and click **Don't Save** when asked if you want to save the changes to 'Book1'.

Exercise 18: Outlook Integration

15 to 25 minutes

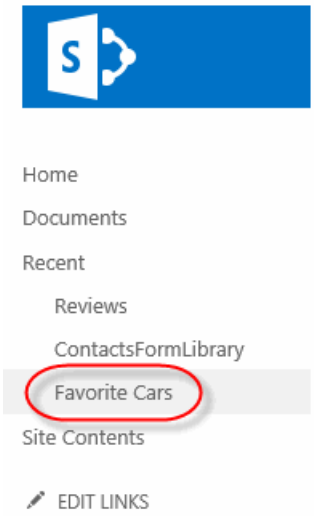
In this exercise, you will learn how to use Outlook with your SharePoint site.

1. Create an alert for the **Favorite Cars** list.

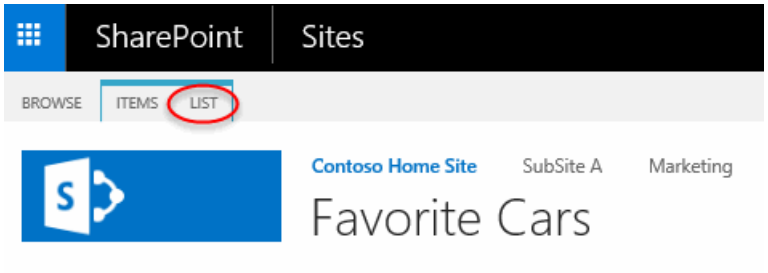
> **Note**
>
> This alert exercise will work only if your SharePoint server is configured with an email server it can deliver to and the account you are logged in with has a valid email address.

A. Open your browser if it is not already open and navigate to your root team site.

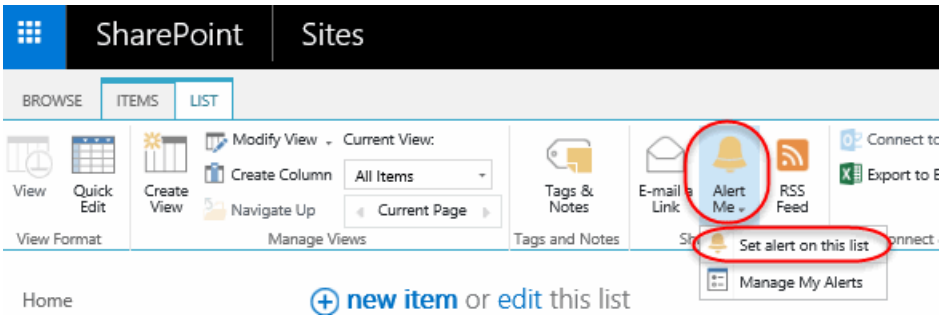
B. Click the **Favorite Cars** link in the **Quick Launch** menu to navigate to the list.



C. Click the **List** tab to open the toolbar.



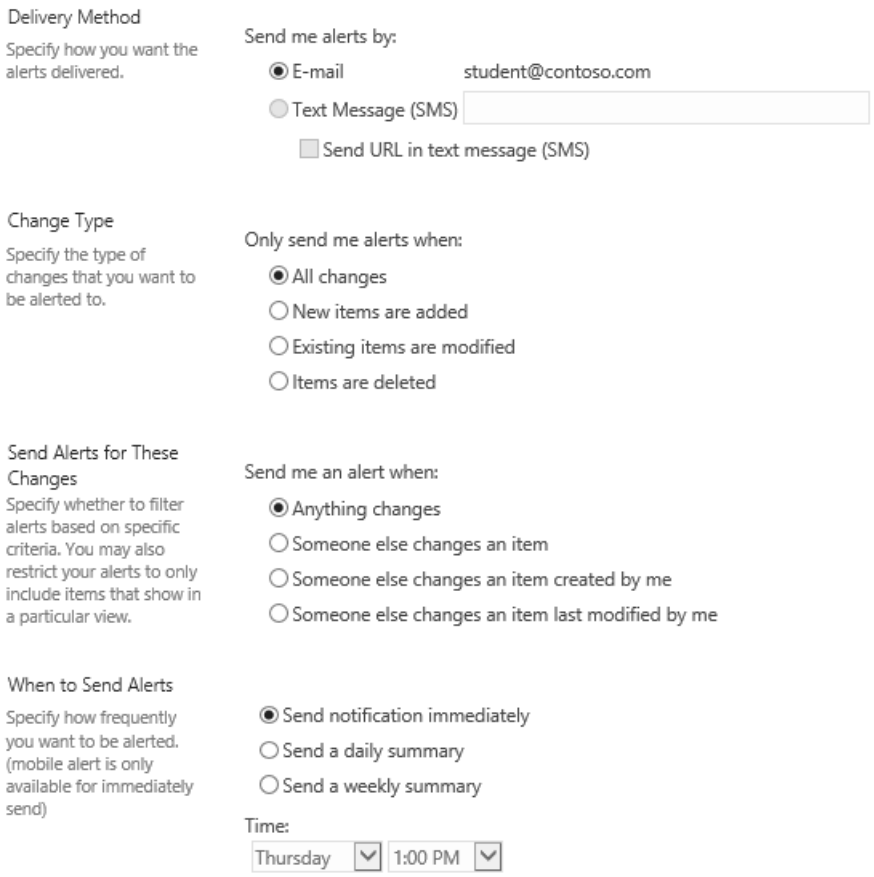
D. Click the **Alert Me** drop-down button in the **Share & Track** region on the **List Tools List** tab toolbar and select the **Set alert on this list** option.



Note

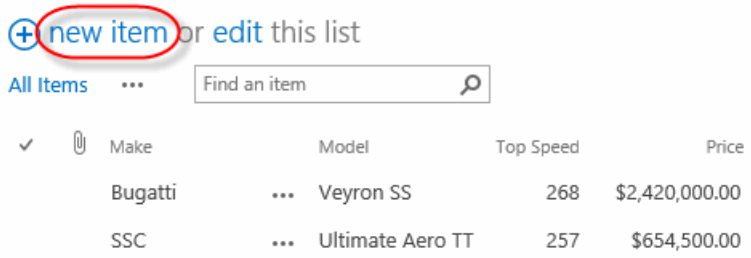
The **Alert Me** button only displays if the Farm administrator has configured the server with an outgoing mail server address.

E. Leave all the default options in the **Favorite Cars - New Alert** dialog form but take a moment to read the options and their descriptions. Click the **OK** button, once you are done scanning the options, to save the new alert.



2. Add a new **Favorite Cars** item to the list to test the new alert.

   A. Click the **new item** link at the top of the list.



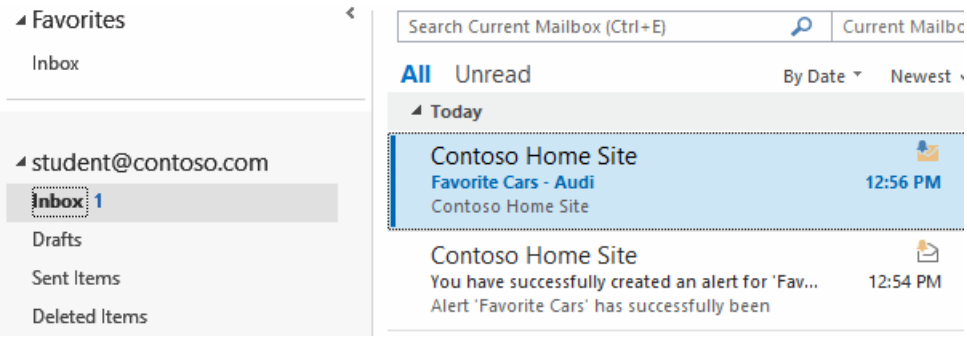
   B. Enter the following values for new Favorite Car item and click the **Save** button to save the data back to the list.

Make	Model	Top Speed	Price
Audi	R8	198	196,800.00

3. Check for an alert in Microsoft Outlook 2013.

   A. Launch Microsoft Outlook 2013.

   B. You will eventually have two emails in your **Inbox** generated by the alert system. It could take up to 10 minutes for them to appear due to a delay in the SharePoint service responsible for generating emails, even with the alert option set to **Send notification immediately**.



Note

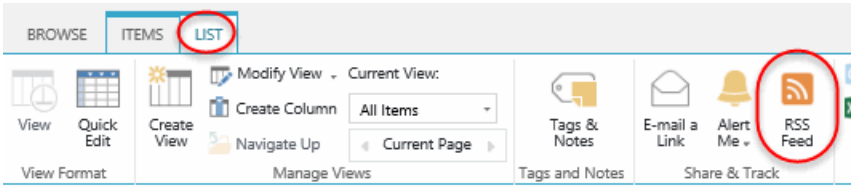
If the alert message has not arrived in your **Inbox** yet, you may wish to continue to the next step in this exercise and check back later.

   C. Leave Microsoft Outlook open for the next step in this exercise.

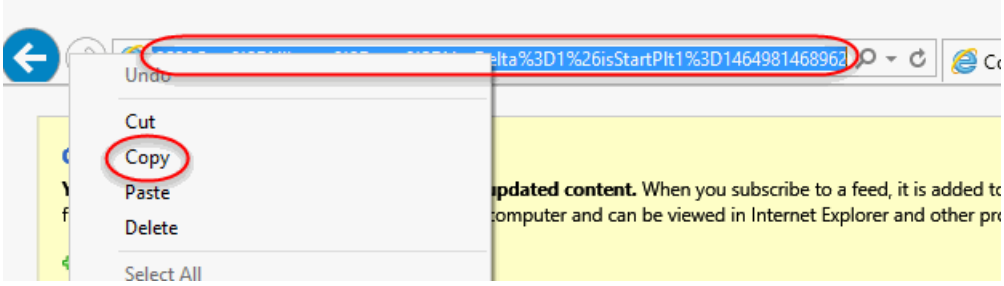
4. Subscribe to an RSS feed in the **Favorite Cars** list.

   A. Go back to your browser window with the **Favorite Cars** list **All Items** view showing.

   B. Click the **RSS Feed** button in the **Share & Track** region on the **List Tools List** tab toolbar.



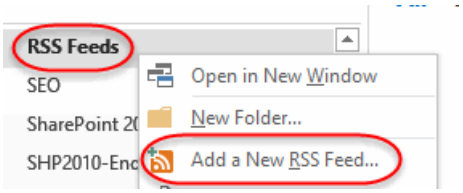
   C. Right-click the URL field in the browser and choose the **Copy** option to copy the URL into the Windows clipboard.



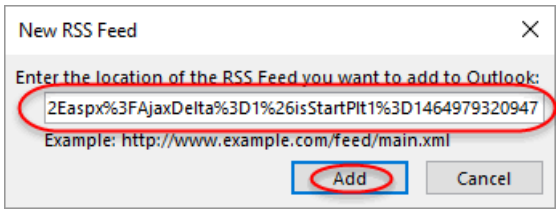
Note

The RSS page does offer a link **Subscribe to this feed** but it tends to react differently in different browsers. In Internet Explorer is will add the RSS feel to the Windows Common Feed List but with the Microsoft Edge browser it reacts differently. Manually copying the URL and pasting it into Outlook offers a more consistent method. Note that you can configure Outlook to automatically sync with the Windows Common Feed List but it is not configured that way by default.

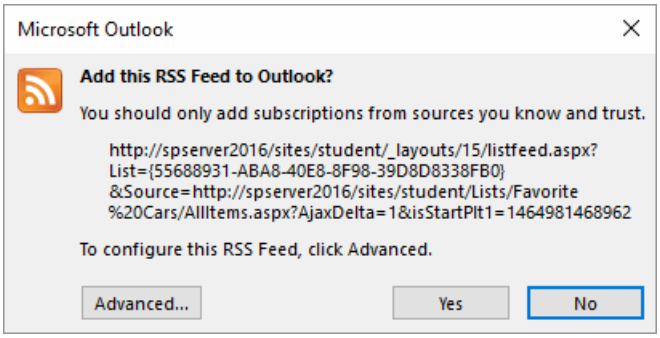
D. Switch to the Outlook window or open one if it is not already open, and right-click the **RSS Feeds** folder and choose the **Add a New RSS Feed…** option.



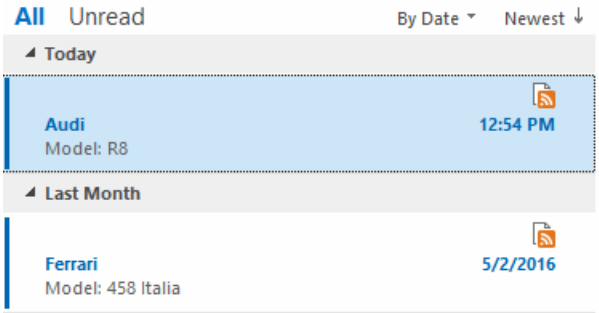
E. Type **Ctrl+V** to paste the RSS URL into the **New RSS Feed** dialog field and click the **Add** button.



F. Click the **Yes** button on the **Microsoft Outlook** dialog verifying you want to add the RSS feed to Outlook.

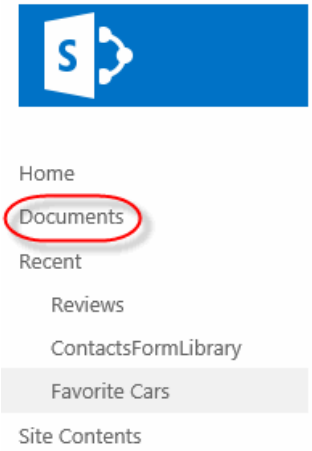


G. Verify that Outlook shows the latest items from the list in the view of the RSS Feed.

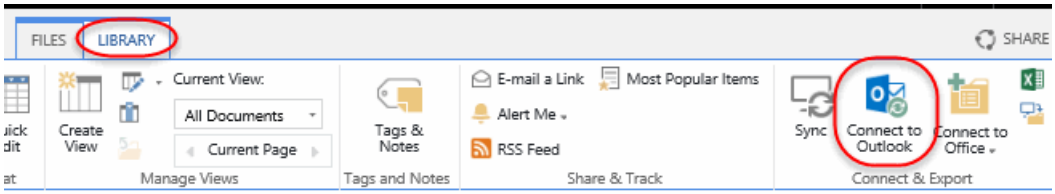


5. Connect the **Documents** library to Outlook.

A. Go back to your browser window and click the **Documents** library on the root site's **Quick Launch** menu.



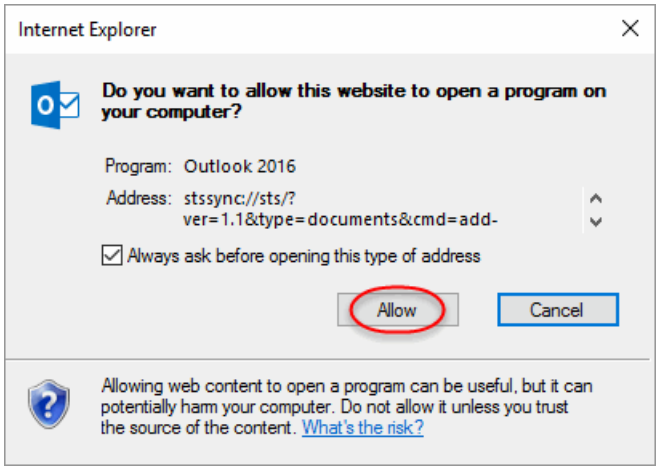
B. Click the **Connect to Outlook** icon in the **Connect & Export** region on the **Library** tab toolbar.



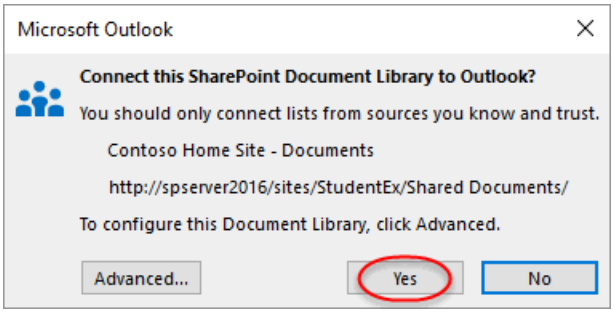
Note

Depending on the width of your browser screen, you may or may not see the label text "Connect to Outlook".

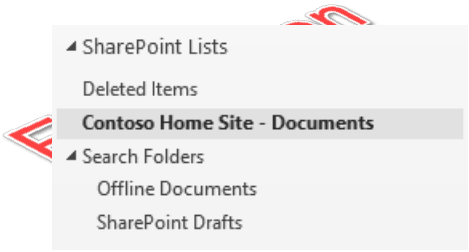
C. In the **Internet Explorer** dialog window that asks you "Do you want to allow this website to open a program on your computer?", click the **Allow** button.



D. In the **Microsoft Outlook** dialog window that asks you "Connect this SharePoint Document Library to Outlook?", click the **Yes** button.



E. A new **SharePoint Lists** tree menu will be added to your Outlook side bar menu with the **Documents** added and opened. Outlook can now be used to view, create, and edit items in the **Documents** library. Additionally, you can work offline with this library through Outlook.

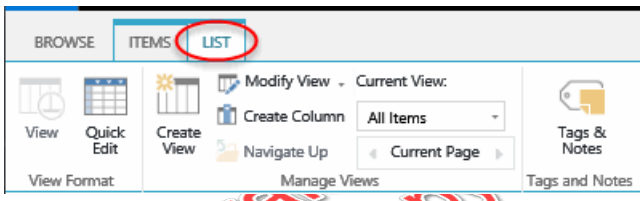


Exercise 19: Access Integration

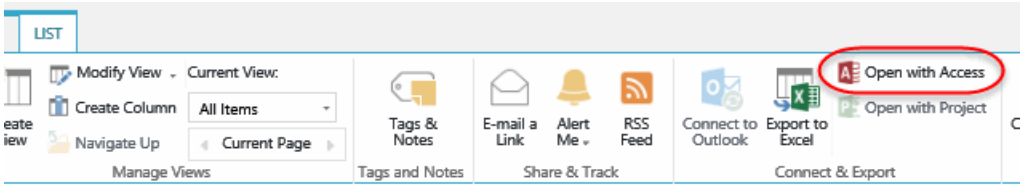
15 to 25 minutes

In this exercise, you will learn how to use Microsoft Access with your SharePoint site.

1. Open the **Favorite Cars** list in Microsoft Access.
   A. Open your browser if it is not already open and navigate to your root team site.
   B. Click the **Favorite Cars** link in the **Quick Launch** menu to navigate to the list.
   C. Click the **LIST** tab to open the toolbar.



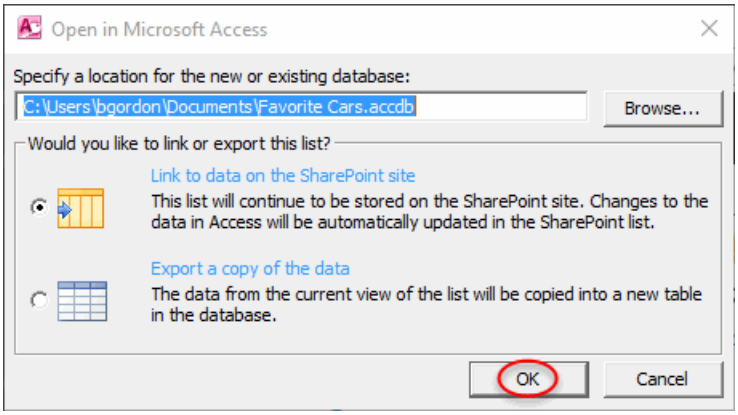
   D. Click the **Open with Access** icon in the **Connect & Export** region on the **List** tab toolbar.



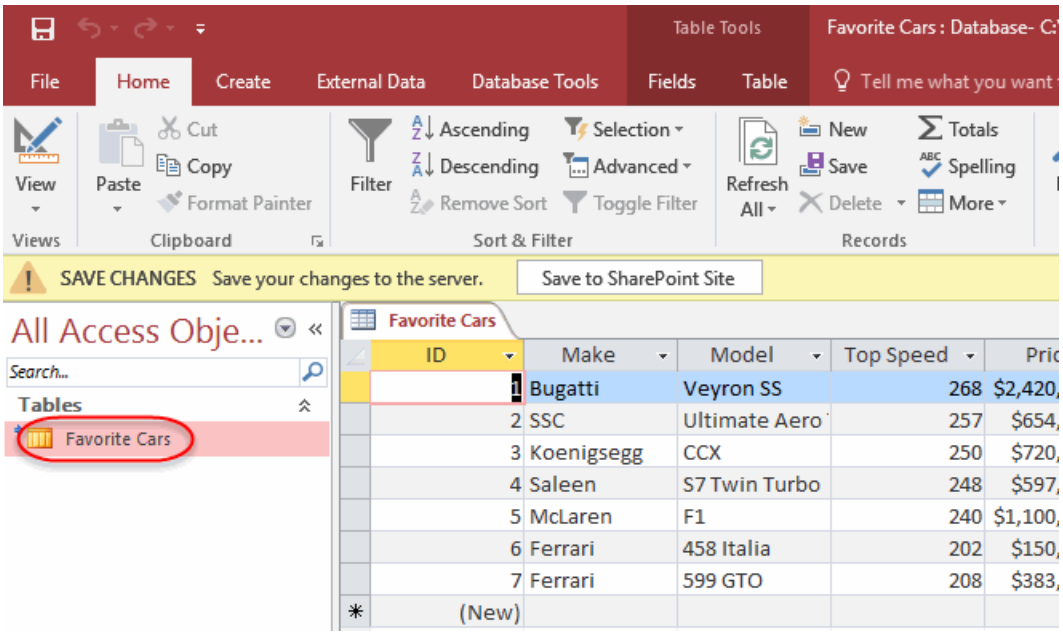
Note

Depending on the width of your browser screen, you may or may not see the label text “Open with Access”.

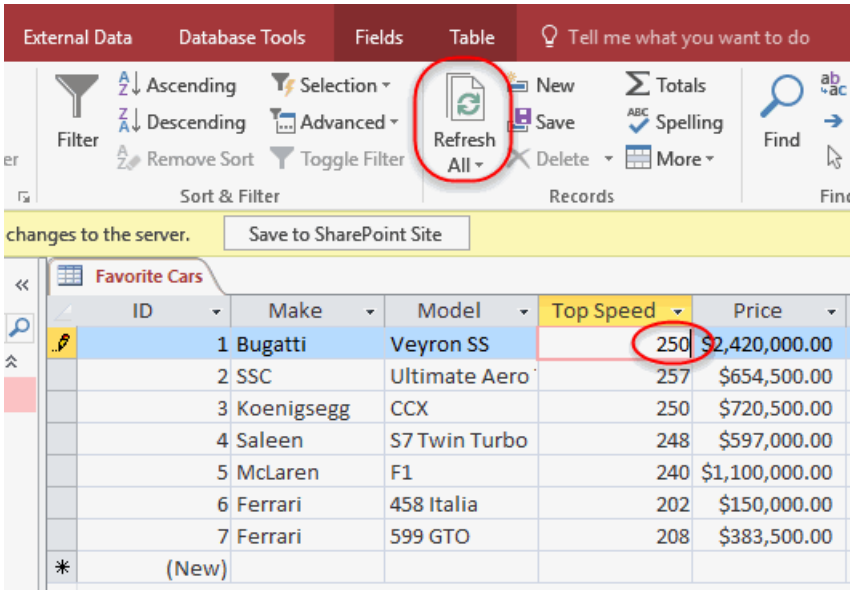
   E. Leave the default settings and click the **OK** button in the **Open in Microsoft Access** dialog window.



F. In the Microsoft Access window that opens, double-click the **Favorite Cars** link in the **Tables** window to open it and view the data.



G. Modify the Bugatti's **Top Speed** to be "250". Click the **Refresh All** button in the **Home** tab on Access's toolbar.



H. Go back to your browser window and refresh the **Favorite Cars** page. The Bugatti item in the browser window should now be the same as what you changed it to in Access.

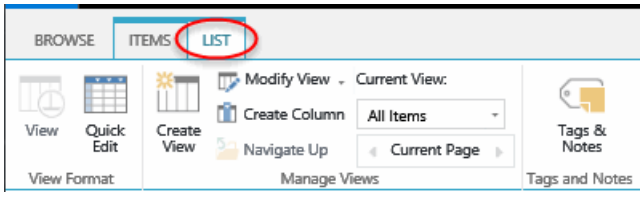
I. Try editing the Bugatti's **Top Speed** in the browser back to "268" and saving it. Go back to the Access window and click the **Refresh All** button in the **Home** tab and verify that Access now displays "268" for the Bugatti's **Top Speed**.

J. Close Access when you are done trying out the editing and synchronizing.

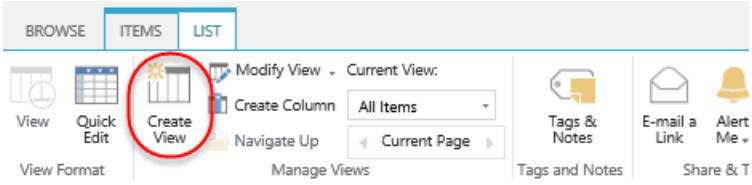
2. Create an Access View for the **Favorite Cars** list.

A. Click the **Favorite Cars** link in the **Quick Launch** menu to navigate to the list.

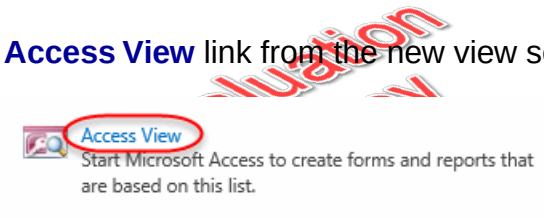
B. Click the **LIST** tab to open the toolbar.



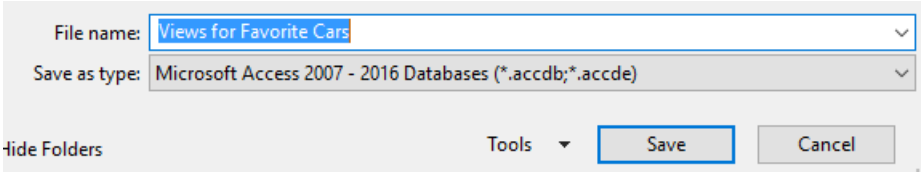
C. Click the **Create View** icon on the **List** tab toolbar.



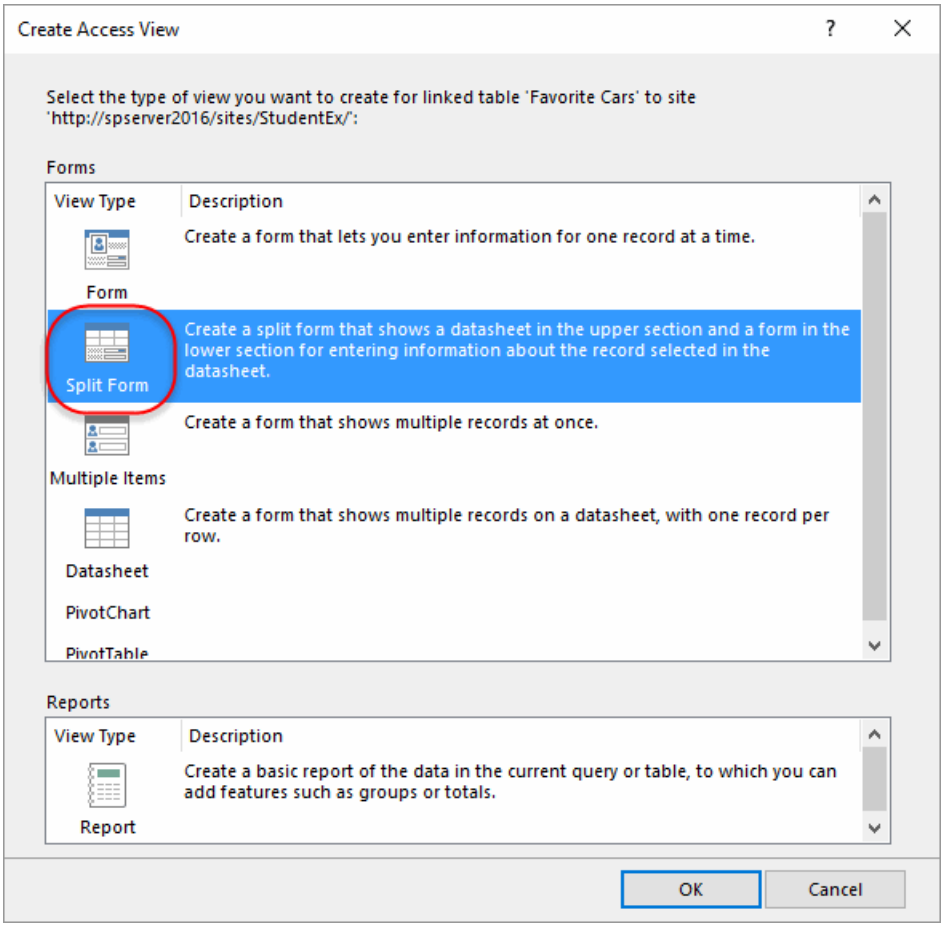
D. Click the **Access View** link from the new view selection page.



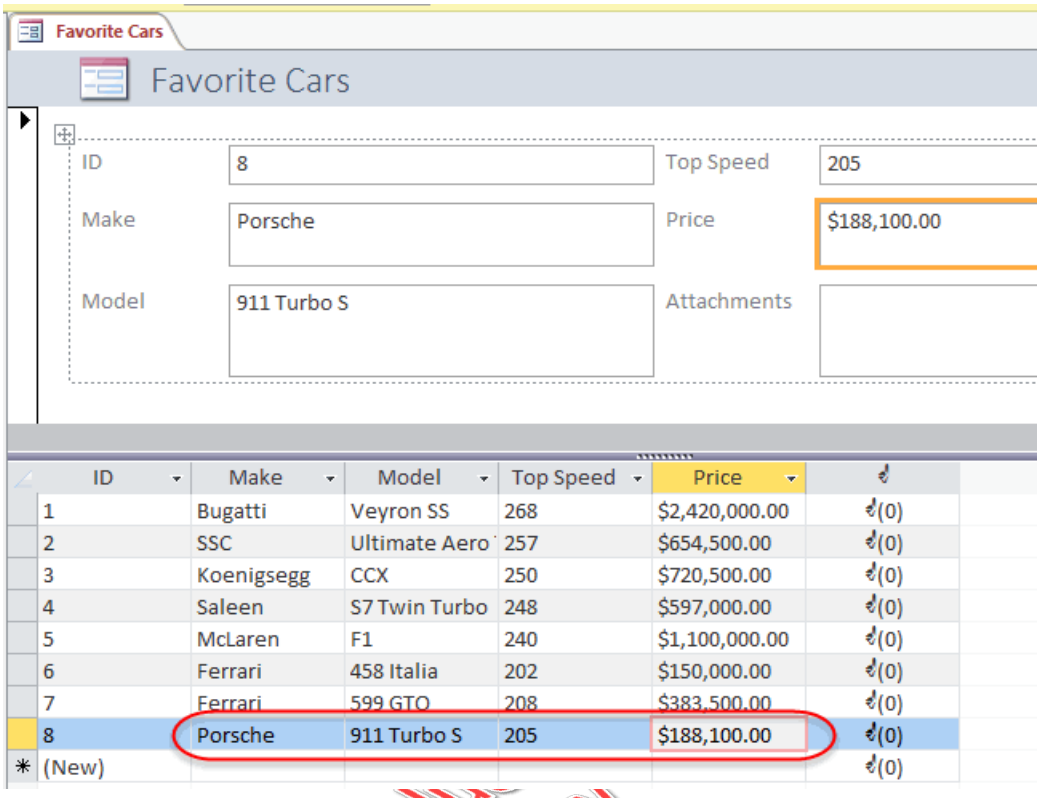
E. In the Access dialog that opens click the **Save** button to save a local copy with the new view with the default file name.



F. In the **Create Access View** dialog of choices choose the **Split Form** template and click the **OK** button.



G. Click into the **Make** field of the row labeled **(New)** and create a new entry in the **Favorite Cars** list by entering values for each of the fields. You can use the following screen capture for input data.

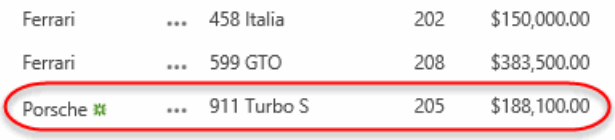


Note

Note that the fields above the datasheet are for viewing only, you cannot use them to enter data. Some of the other view templates have forms with editable fields or you can modify this view and change the fields to editable.

H. Switch back to the Internet Explorer window and click the **Favorite Cars** link in the **Quick Launch** to refresh the list.

I. Note that the entry from the Access view is automatically saved back to the SharePoint list.



J. Close Access and click the **Yes** button to save the changes.

K. Click the **OK** button on the **Save As** dialog for the form name.

Note
Note that the Access views do not list with other custom views in the browser but you can use it by opening the Access file created when the Access View was created.

Conclusion

In this lesson, you have learned:

- How to create a list from and Excel spreadsheet.
- How to update a spreadsheet view of SharePoint list data.
- How to create an alert.
- How to subscribe and view an RSS feed from a SharePoint list.
- How to make a copy of a library in Outlook.
- How to use the Datasheet view.
- How to open and edit a list in Access.

LESSON 10

Managing SharePoint Site Permissions

Topics Covered

☑ SharePoint groups.

☑ Creating SharePoint groups.

☑ Assigning permission in SharePoint.

☑ Viewing permission levels.

☑ Managing permission inheritance at the site level.

☑ Managing permission inheritance at the list or library level.

☑ Managing permission inheritance at the item level.

Introduction

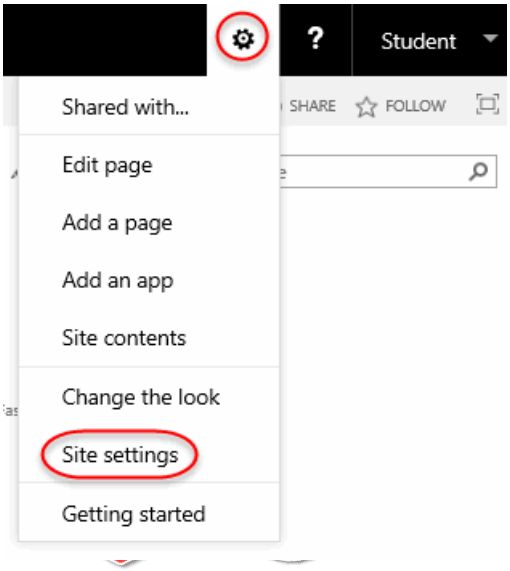
Permissions on a SharePoint site are assigned when a site is created. The default is that permissions assigned to the root of a site collection are inherited by child sites. At any time, permissions inheritance can be turned off at a site, list, library, or even at the item level in a list or library. The permissions themselves can be assigned to either SharePoint groups, individual users, or groups created outside of SharePoint such as Windows groups.

10.1. SharePoint Groups

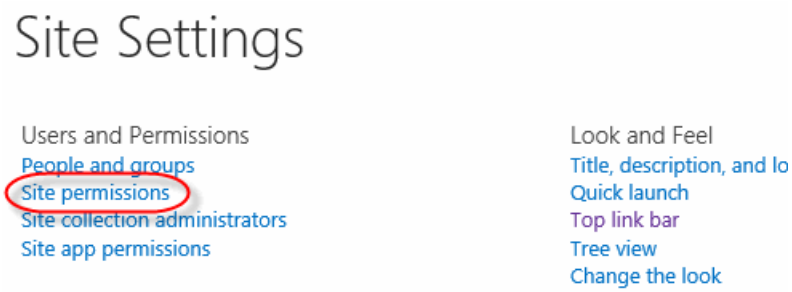
❖ 10.1.1. View the Default SharePoint Groups

SharePoint creates default groups based on the template used to create the root site in the site collection. In the following walk-through you will view the default groups created in your root site, **Contoso Home Site** is the title of the root site used in the walk-through. Later in this lesson, you will explore how child sites inherit these groups by default and how to change that.

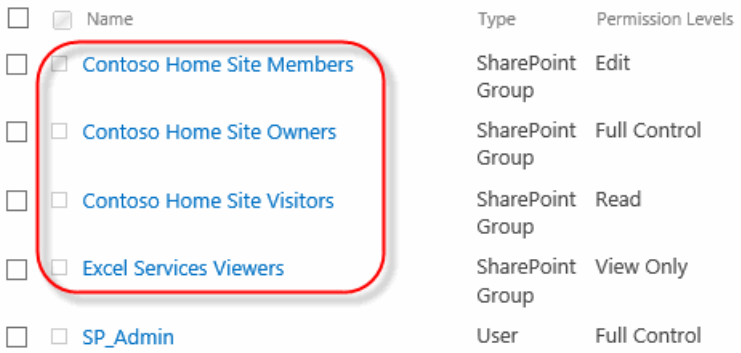
1. Make sure your browser is open to the root team site.
2. Click the **Settings** menu link and then select the **Site settings** link from the available options.



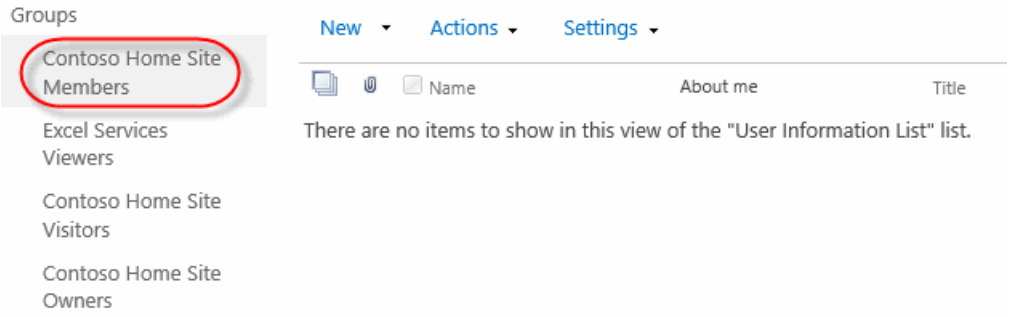
3. Click the **Site permissions** link on the **Site Settings** page.



4. Verify the default groups in the list are **Members**, **Owners**, **Visitors**, and **Excel Services Viewers**. Note that the **Members**, **Owners**, and **Visitors** groups have the site's name **Contoso Home Site** appended to them.



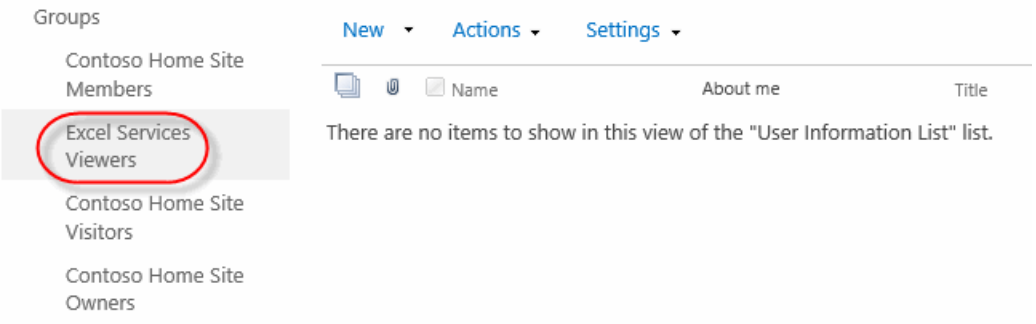
5. Click the **Members** link to view the list of members and verify that it is currently empty.



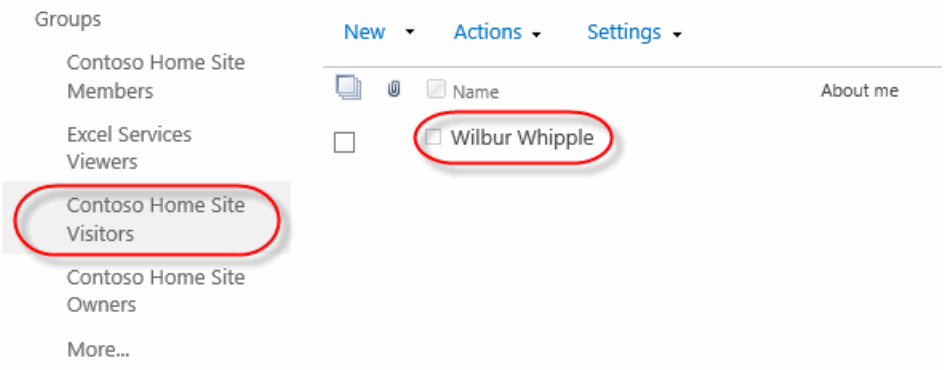
Note

Note that when you view a SharePoint group's membership list, the **Quick Launch** menu is modified to provide links to the other SharePoint groups for easy access.

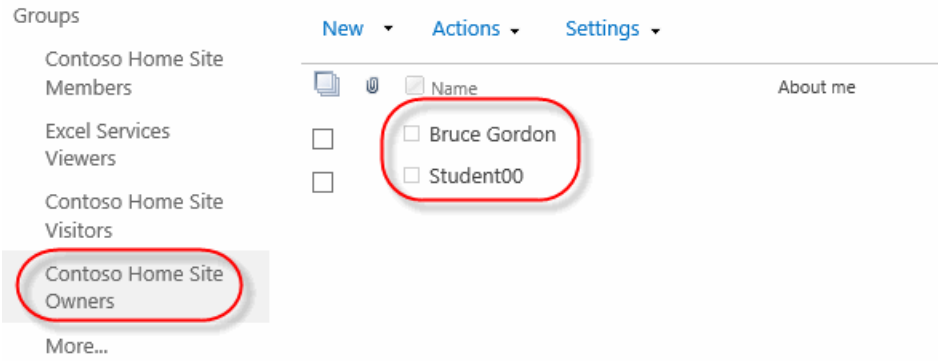
6. Click the **Excel Services Viewers** link in the **Quick Launch** menu to view its members and verify that it is currently empty.



7. Click the **Visitors** link in the **Quick Launch** menu to view its members and verify that Wilbur Whipple is a member.



8. Click the **Owners** link in the **Quick Launch** menu to view its members and verify it contains your account.



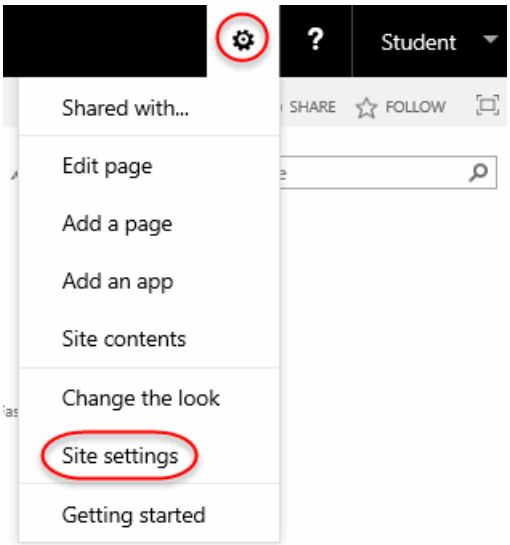
Note

These accounts were added during the creation of the root site and site collection. The accounts might be different in your installation.

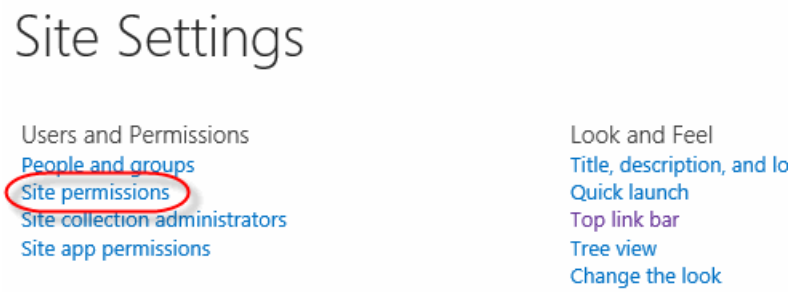
9. Navigate back to the original view of all the groups and the **PERMISSIONS** toolbar.

> **Note**
>
> Note that you could alternatively click the **Groups** link or the **More…** link in the **Quick Launch** to view the **People and Groups: All Groups** list. One downside to this view is it does not provide you the **PERMISSIONS** toolbar.

   A. Click the **Settings** menu link and then select the **Site settings** link from the available options.

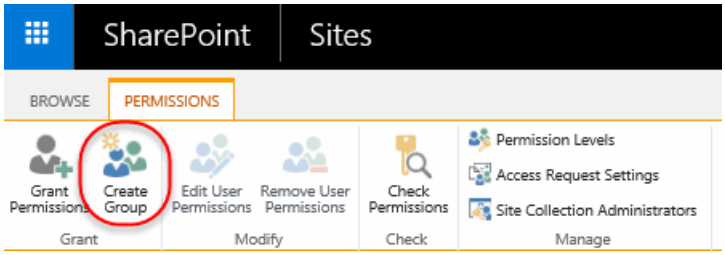


   B. Click the **Site permissions** link on the **Site Settings** page.

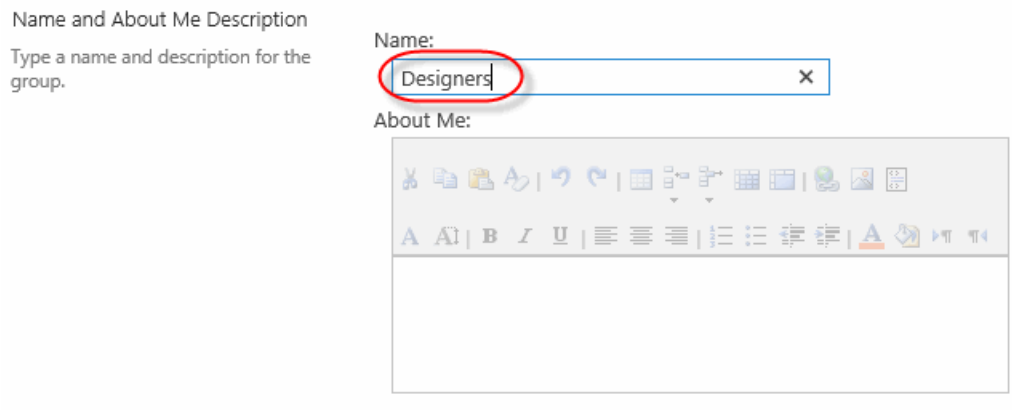


10. Create a new SharePoint group.

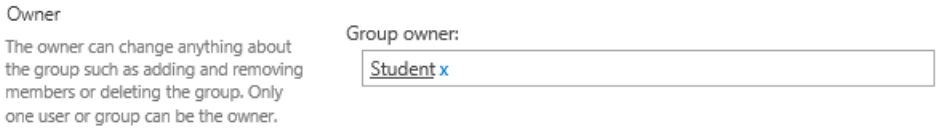
   A. Click the **Create Group** link button from the **PERMISSIONS** toolbar.



B. Enter `Designers` in the **Name** field of the **Create Group** form.



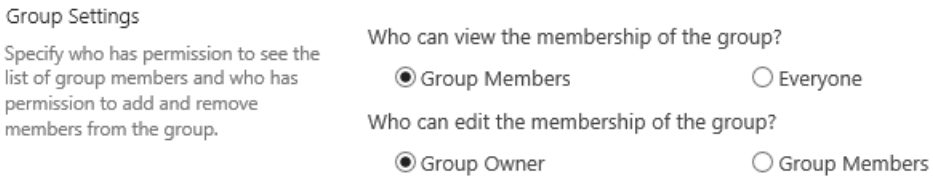
C. Leave the owner user set to your account.



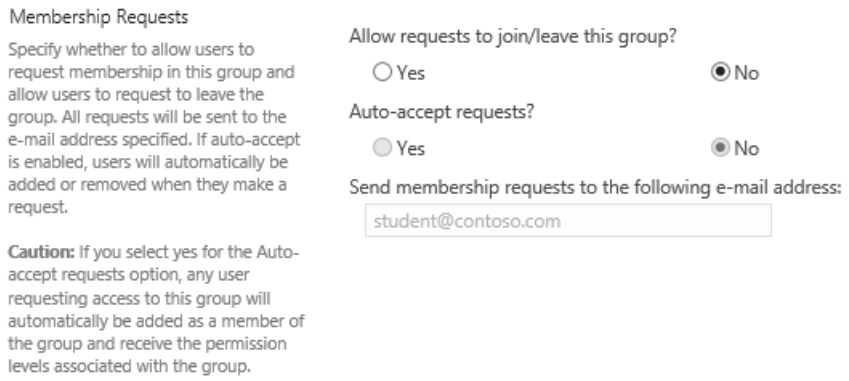
Note

Note that we can only have one entry for the **Owner**, but we can switch the user for a group.

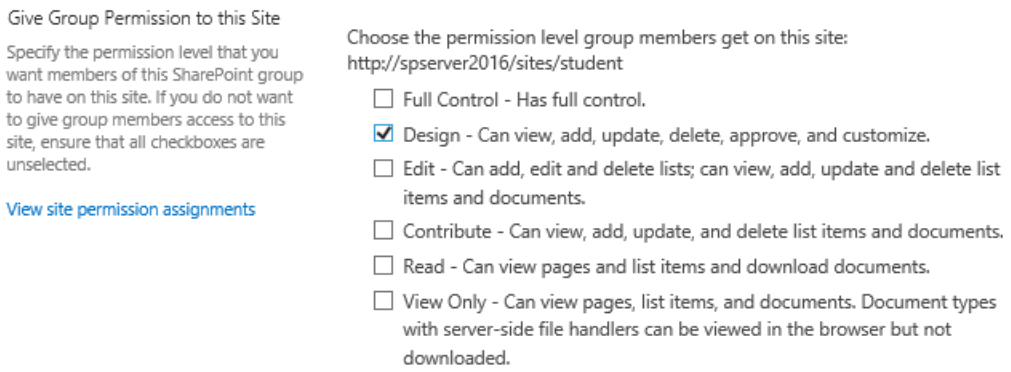
D. Leave the default options set in the **Group Settings** region.



E. Leave the default options set in the **Membership Requests** region.



F. Select the **Design** option in the **Give Group Permission to this Site** region and click the **Create** button to complete the process.

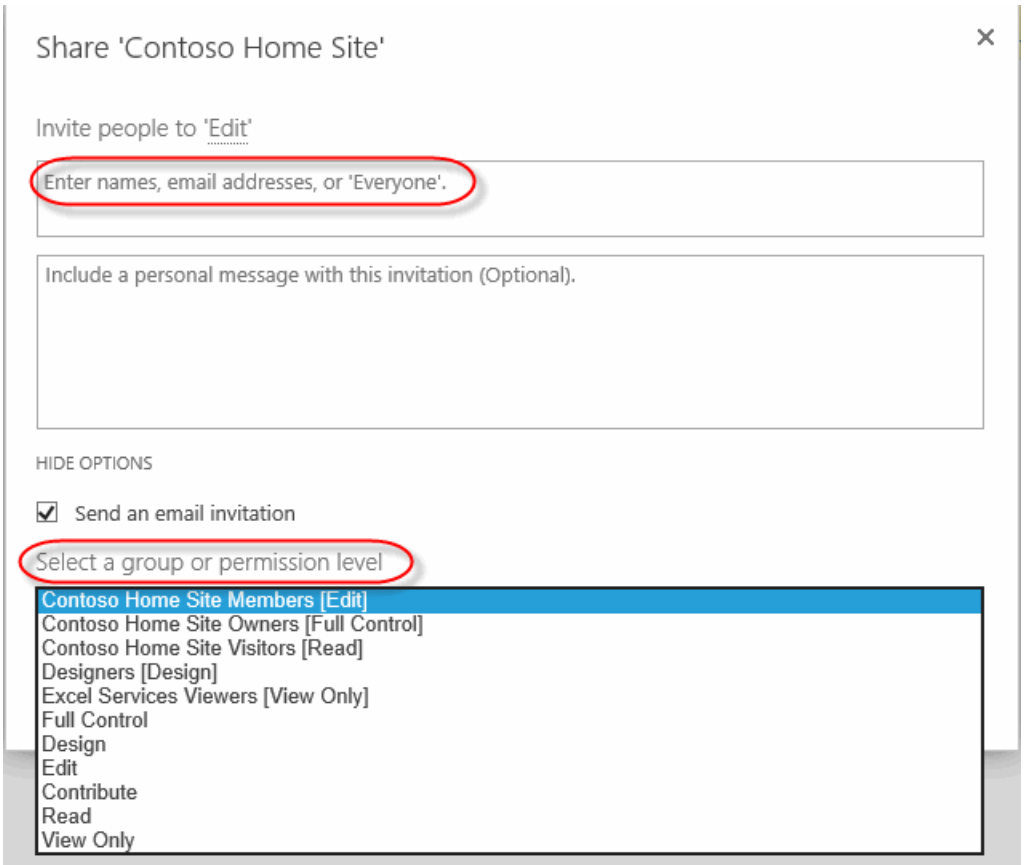


Note

The **Design** permission has more site level permissions than the **Contribute** level but less than the **Full Control** level. Later in this lesson, you will learn about Permission Levels.

10.2. Assigning Permissions

Assigning permissions to SharePoint resources can be done several different ways. One method is to assign a user or group account, typically Windows users or groups, directly to a permission level or add them to a SharePoint group.

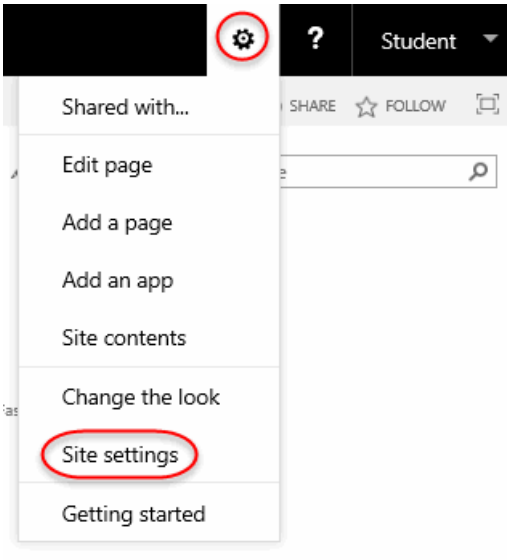


The recommended method is to grant permissions by adding user or group account into the SharePoint groups. The following walk-through will take this recommended approach.

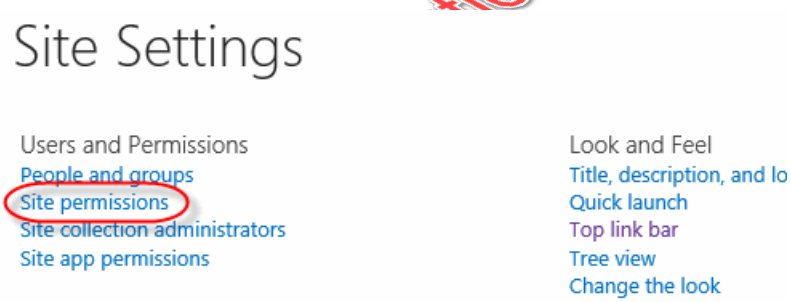
❖ 10.2.1. Add a User Account to a SharePoint Group

This walk-through will use the recommended method of adding a Windows user account into a SharePoint group to receive the permissions level assigned to that group.

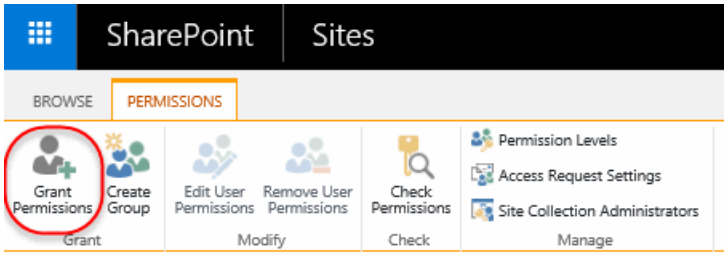
1. Make sure your browser is open to the root team site.
2. Click the **Settings** menu link and then select the **Site settings** link from the available options.



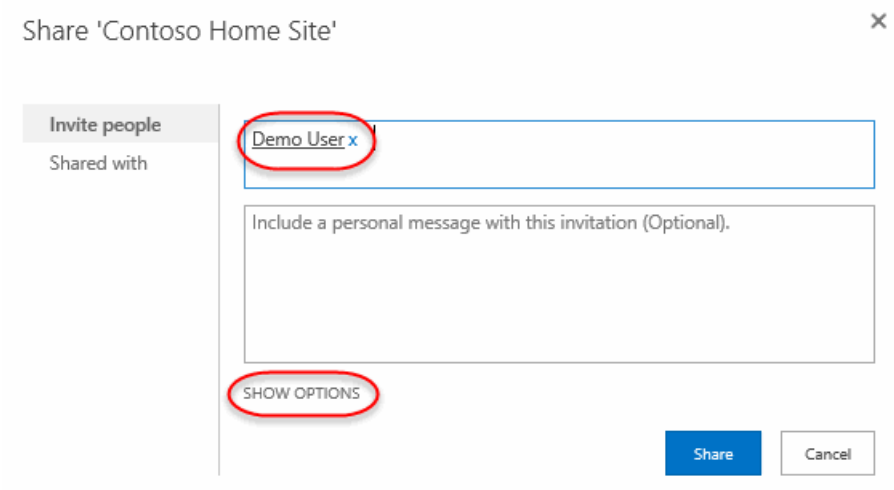
3. Click the **Site permissions** link on the **Site Settings** page.



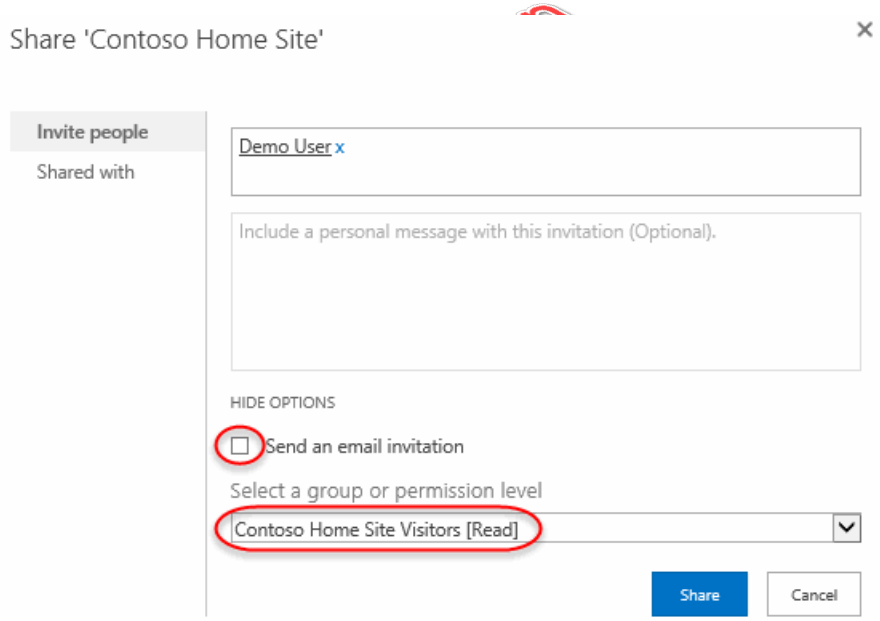
4. Click the **Grant Permission** link button from the **PERMISSIONS** tab toolbar.



5. Enter `DemoUser` in the **Invite people** field and click the **SHOW OPTIONS** link.



6. Change the **Select a group or permission level** drop-down option to **<<Site Name>> Visitors [Read]** and uncheck the **Send an email invitation** option.



7. Click the **Share** button to complete the action.

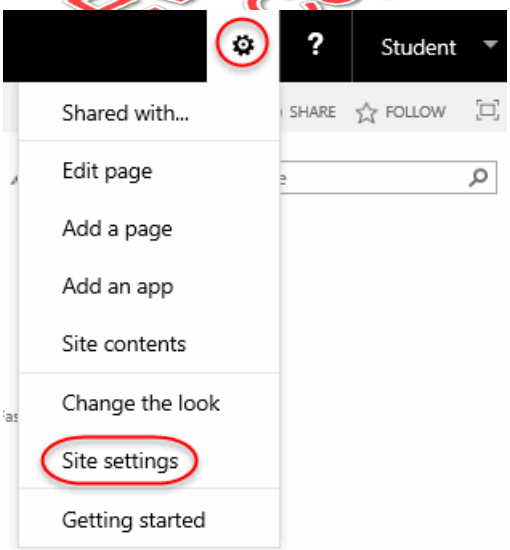
10.3. Permission Levels

Permission level can only be created by Site Collection administrators or Farm level administrators. For that reason, creating and modifying permission levels is outside the scope of this course. What we will do is view the granular permissions that are combined in a permission level. The permission levels usage you have already seen in the earlier demonstration when we created a new SharePoint group. You can also assign a permission level directly to a user or group, Windows users and groups typically, but this is not recommended.

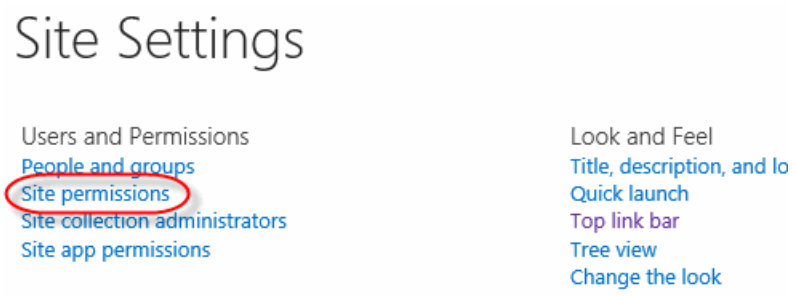
❖ 10.3.1. View Permission Level Permissions

This walk-through will view the granular permissions that are assigned to the **Full Control** permission level.

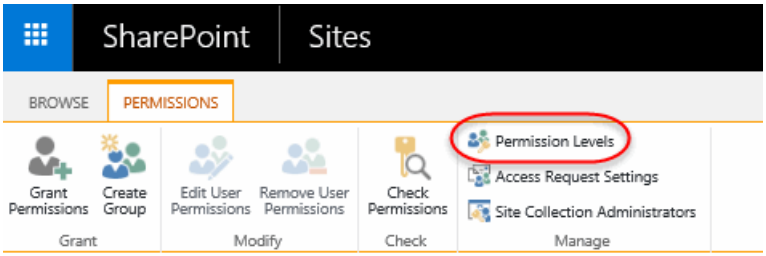
1. Make sure your browser is open on your root team site.
2. Click the **Settings** menu link and then select the **Site settings** link from the available options.



3. Click the **Site permissions** link on the **Site Settings** page.



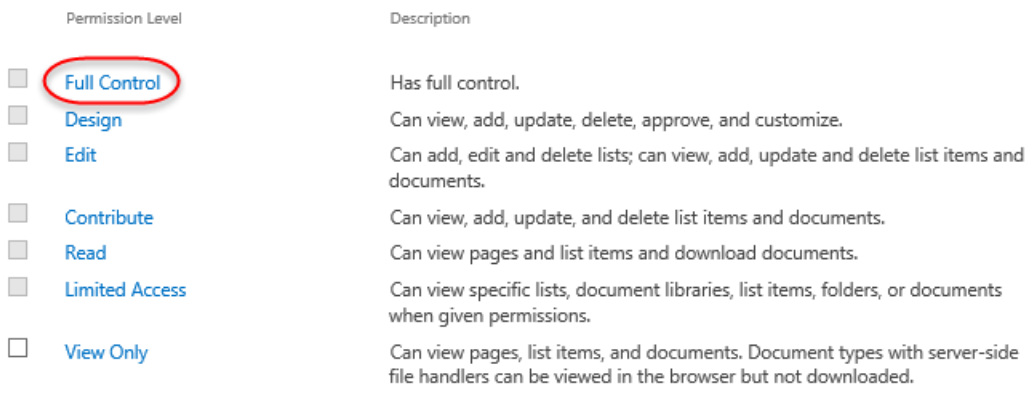
4. Click the **Permission Levels** link button from the **Edit** tab of the **Permission Tools** toolbar.



Note

Note that the **Permission Levels** link button is only available at the root site of the Site Collection.

5. Click the **Full Control** link in the **Permission Levels** page to view the permissions.



6. Note the permissions are divided into three groups **List Permissions**, **Site Permissions**, and **Personal Permissions**. Take a few moments to read through the list of permissions and their descriptions.

List Permissions

- ☑ Manage Lists - Create and delete lists, add or remove columns in a list, and add or remove public views of a list.
- ☑ Override List Behaviors - Discard or check in a document which is checked out to another user, and change or override settings which allow users to read/edit only their own items
- ☑ Add Items - Add items to lists and add documents to document libraries.
- ☑ Edit Items - Edit items in lists, edit documents in document libraries, and customize Web Part Pages in document libraries.
- ☑ Delete Items - Delete items from a list and documents from a document library.
- ☑ View Items - View items in lists and documents in document libraries.
- ☑ Approve Items - Approve a minor version of a list item or document.
- ☑ Open Items - View the source of documents with server-side file handlers.
- ☑ View Versions - View past versions of a list item or document.
- ☑ Delete Versions - Delete past versions of a list item or document.
- ☑ Create Alerts - Create alerts.
- ☑ View Application Pages - View forms, views, and application pages. Enumerate lists.

Site Permissions

- ☑ Manage Permissions - Create and change permission levels on the Web site and assign permissions to users and groups.
- ☑ View Web Analytics Data - View reports on Web site usage.
- ☑ Create Subsites - Create subsites such as team sites, Meeting Workspace sites, and Document Workspace sites.
- ☑ Manage Web Site - Grants the ability to perform all administration tasks for the Web site as well as manage content.
- ☑ Add and Customize Pages - Add, change, or delete HTML pages or Web Part Pages, and edit the Web site using a Microsoft SharePoint Foundation-compatible editor.
- ☑ Apply Themes and Borders - Apply a theme or borders to the entire Web site.
- ☑ Apply Style Sheets - Apply a style sheet (.CSS file) to the Web site.
- ☑ Create Groups - Create a group of users that can be used anywhere within the site collection.
- ☑ Browse Directories - Enumerate files and folders in a Web site using SharePoint Designer and Web DAV interfaces.
- ☑ Use Self-Service Site Creation - Create a Web site using Self-Service Site Creation.
- ☑ View Pages - View pages in a Web site.
- ☑ Enumerate Permissions - Enumerate permissions on the Web site, list, folder, document, or list item.
- ☑ Browse User Information - View information about users of the Web site.
- ☑ Manage Alerts - Manage alerts for all users of the Web site.
- ☑ Use Remote Interfaces - Use SOAP, Web DAV, the Client Object Model or SharePoint Designer interfaces to access the Web site.
- ☑ Use Client Integration Features - Use features which launch client applications. Without this permission, users will have to work on documents locally and upload their changes.
- ☑ Open - Allows users to open a Web site, list, or folder in order to access items inside that container.
- ☑ Edit Personal User Information - Allows a user to change his or her own user information, such as adding a picture.

Personal Permissions

- ☑ Manage Personal Views - Create, change, and delete personal views of lists.
- ☑ Add/Remove Personal Web Parts - Add or remove personal Web Parts on a Web Part Page.
- ☑ Update Personal Web Parts - Update Web Parts to display personalized information.

7. Click the **Cancel** button at the bottom of the **Permission Levels** page once you are done viewing the permissions.

10.4. Permissions Inheritance

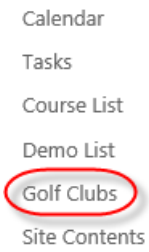
Permissions are initially assigned to the root site of the Site Collection when it is created. Child sites have the option when they are created to use unique permissions or inherit the permissions of the parent site. The default setting is to inherit permissions, but you can always break the inheritance and assign unique permissions any time you like provided you have the permission to do so.

Permissions to lists, libraries, and the items within are similar in that they automatically inherit the permissions of their parent site. Just as with child sites, you can always turn off the inheritance and manage permissions in the list, library, or even the individual item.

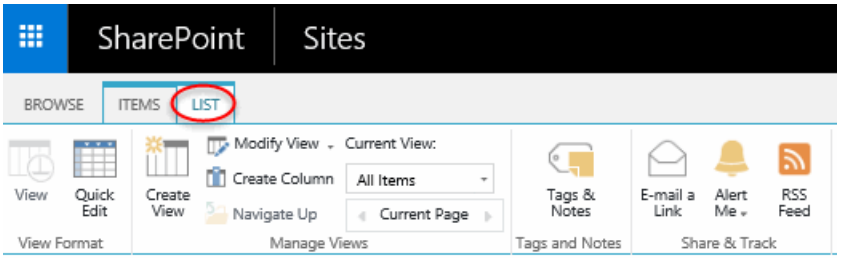
❖ 10.4.1. Modifying Permissions Inheritance

This walk-through will turn off permissions inheritance first in the **Golf Clubs** list and then in the child site **Sub Site A**.

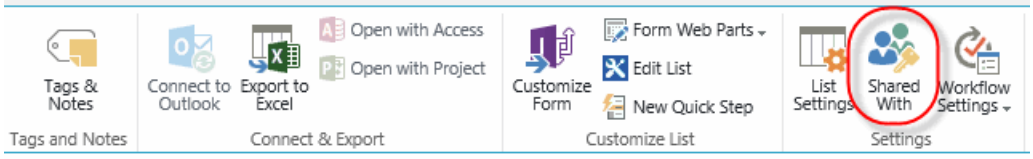
1. Make sure our browser is open on your root team site.
2. Modify the permissions of the **Golf Clubs** list.
   A. Click the **Golf Clubs** link in the **Quick Launch** menu.



   B. Click the **LIST** tab to open the toolbar.



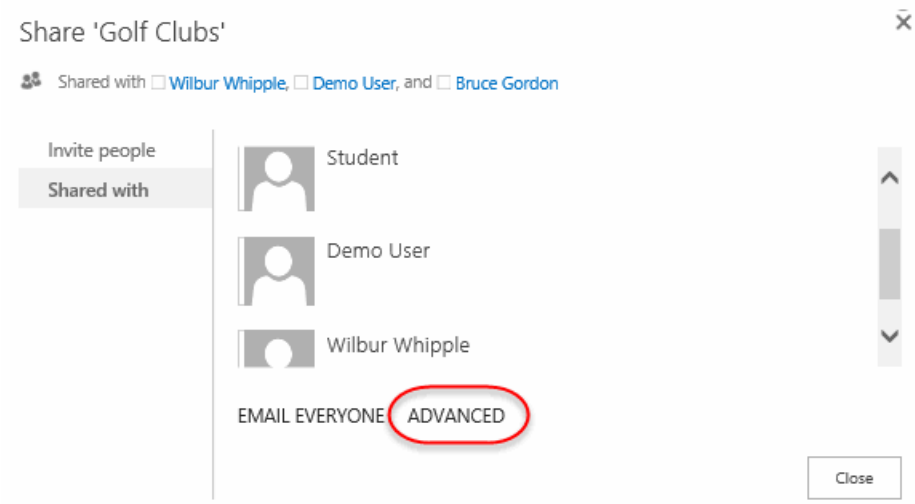
C. Click the **Shared With** link button on the **LIST** tab toolbar.



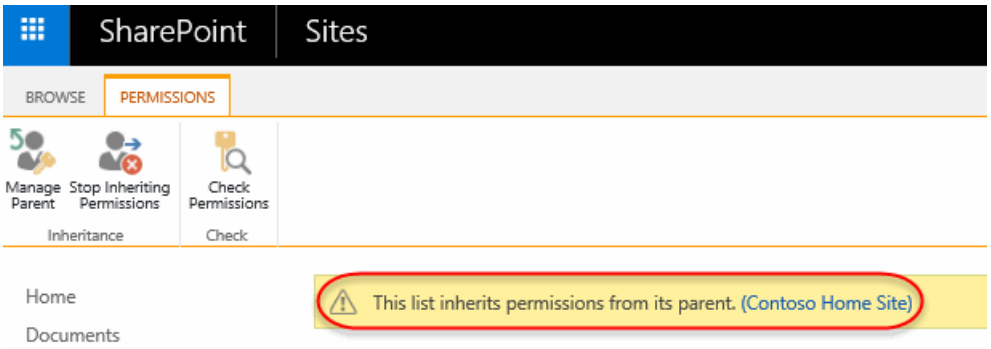
Note

If the browser window is not wide enough, the **Shared With** icon may not display, but it will be listed under the **Settings** button menu. Alternatively, you could use the **List Settings** page and the **Permissions for this list** link on there.

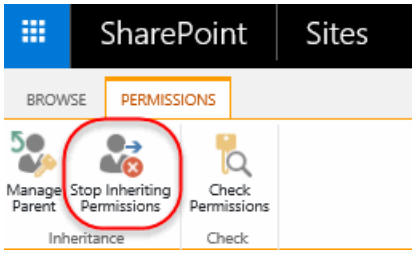
D. The **Shared With** lists the current users who have permissions to the list. Click the **ADVANCED** link.



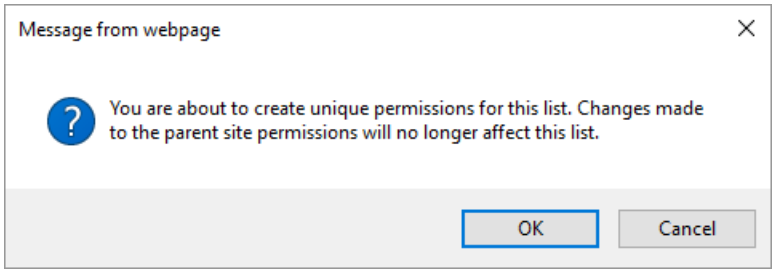
E. Note on the **List Permissions** page for the **Golf Clubs** list there is a banner notifying us that the list is inheriting permissions from its parent, **Contoso Home Site** in this example.



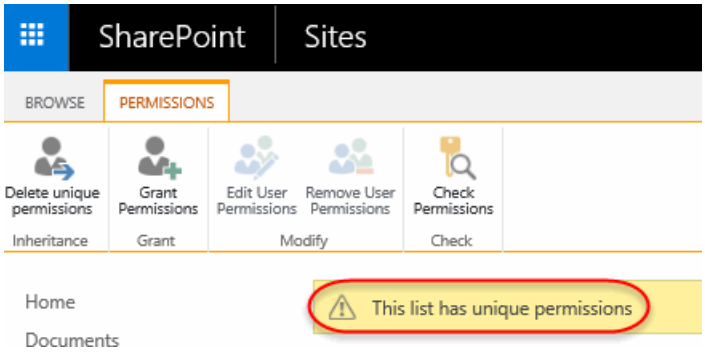
F. Click the **Stop Inheriting Permissions** link button to turn off the inheritance for the **Golf Clubs** list.



G. Click the **OK** button on the **Message from web page** dialog window notifying you that permission from the parent will no longer affect this list.

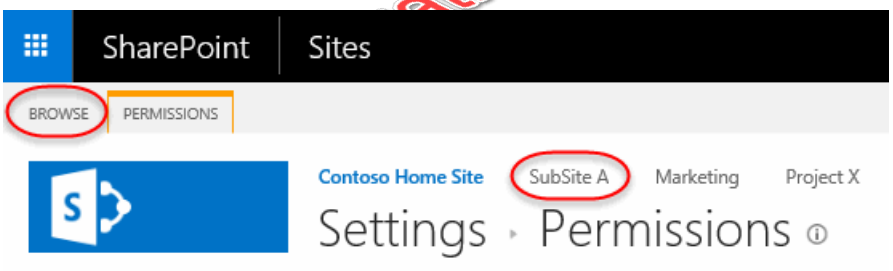


H. Note that now the **List Permissions** page banner is notifying you that **This list has unique permissions** and the **PERMISSIONS** toolbar has more options.



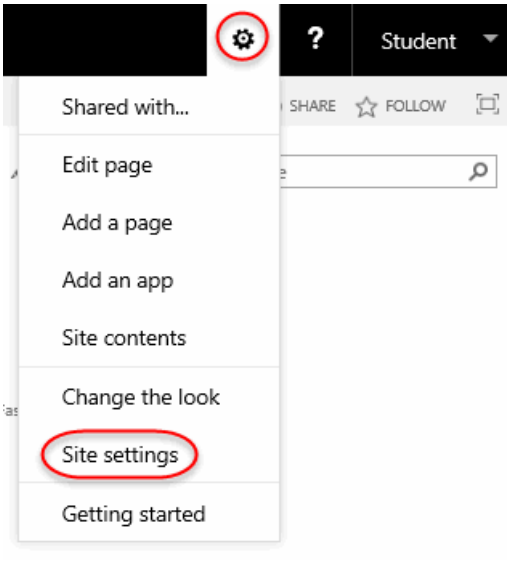
3. Modify the permission of the **Sub Site A** child site.

   A. Click the **BROWSE** tab to close the **PERMISSIONS** toolbar then click the **SubSite A** link in the **Top Link Bar**.

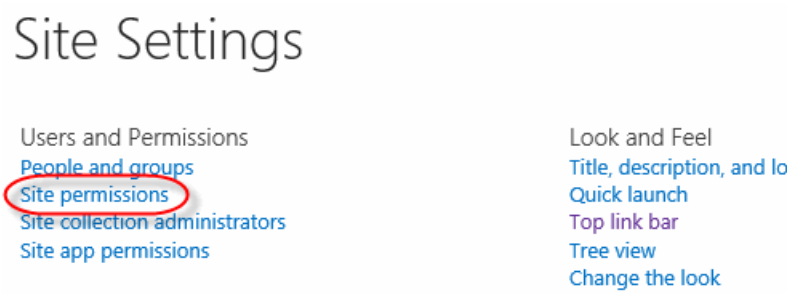


Note
Any child site will do if you do not have one named **Sub Site A**.

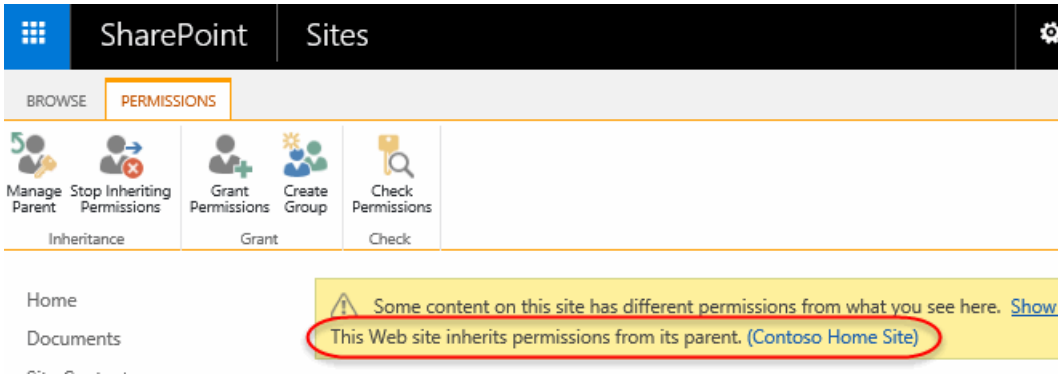
   B. Click the **Settings** menu link and then select the **Site settings** link from the available options.



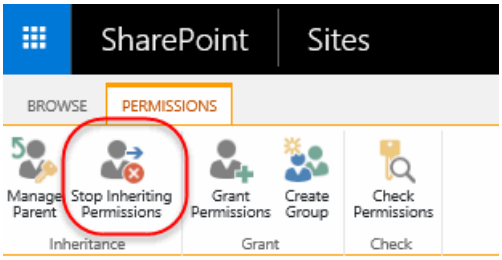
C. Click the **Site permissions** link on the **Site Settings** page.



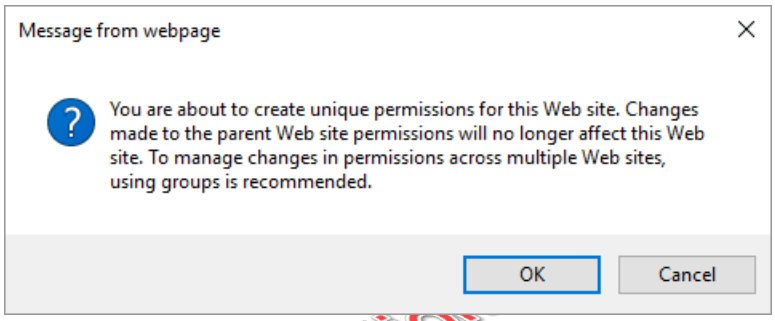
D. Note on the **Site Permissions** page for the **Sub Site A** site there is a banner notifying you that the list is inheriting permissions from its parent.



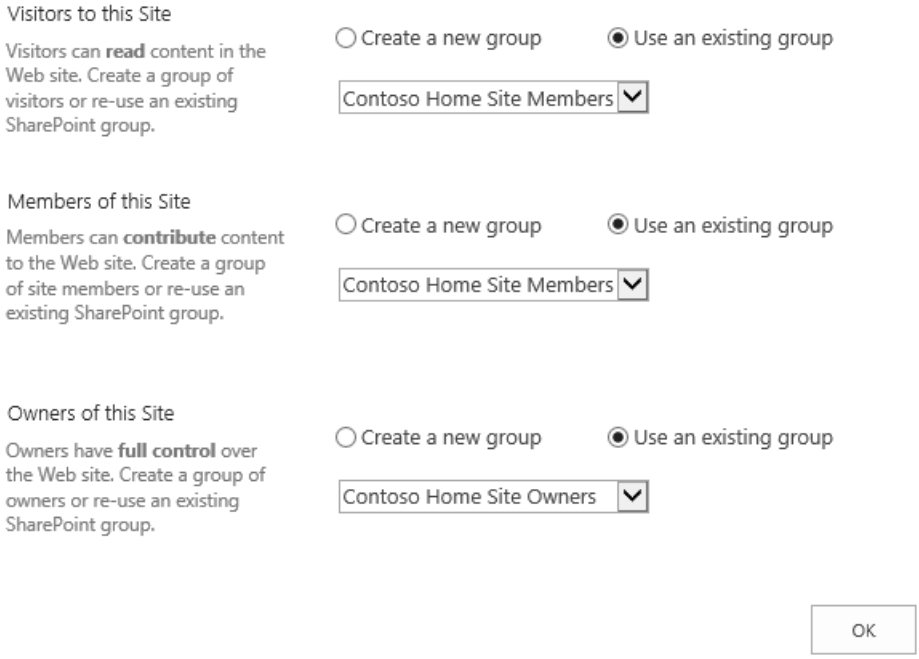
E. Click the **Stop Inheriting Permissions** link button to turn off the inheritance for the **Sub Site A** child site.



F. Click the **OK** button on the **Message from web page** dialog window notifying you that permission from the parent site will no longer affect this site.

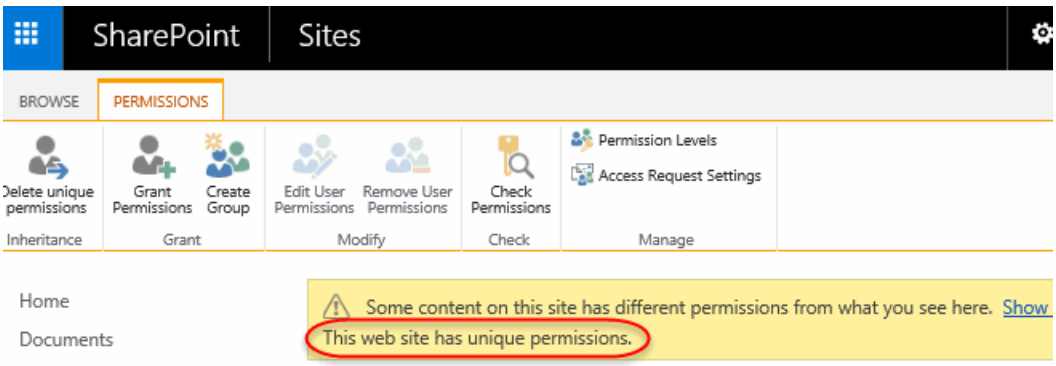


G. When the inheritance is broken, you are given the option of **Use an exiting group** or **Create a new group**. For this walk-through, leave it set to the default and click the **OK** button.



H. Follow the earlier steps to navigate back the **Site permissions** page for **SubSite A**.

I. Note that now the **Site Permissions** page banner is notifying you that **This website has unique permissions**.



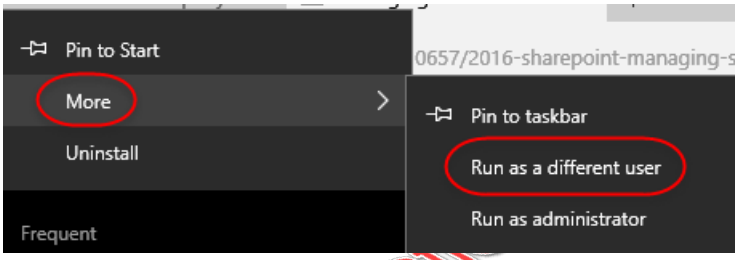
Exercise 20: Working with SharePoint Permissions

15 to 25 minutes

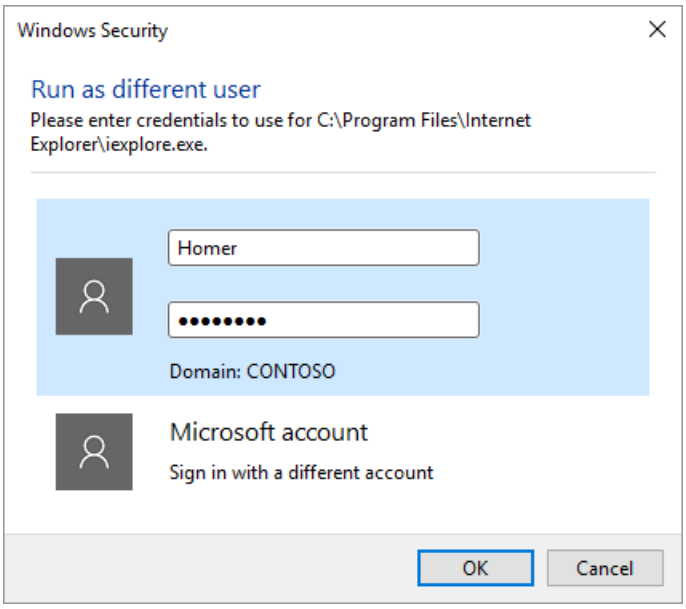
In this exercise, you will learn to manage permissions on your SharePoint site.

1. Attempt to log in to your root site with an account that does not have any permissions to the site.

   A. Right-click your browser icon and choose **More** and then **Run as a different user**.

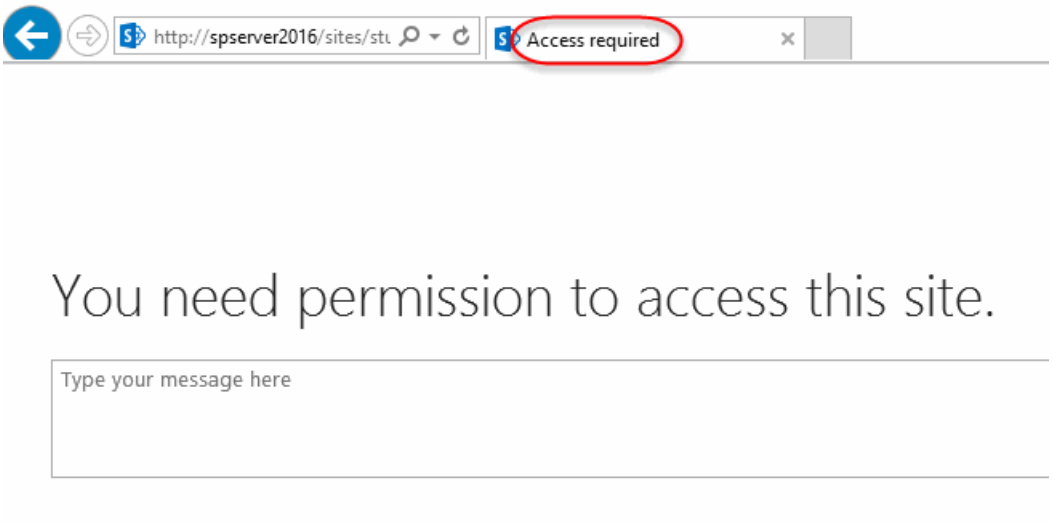


   B. In the **Widows Security** dialog window, enter “Homer” for the account name and “Pa$$w0rd” for the password or any account that does not currently have permissions to the site. Click the **OK** button to complete the logon.



C. Try to navigate to root of your team site.

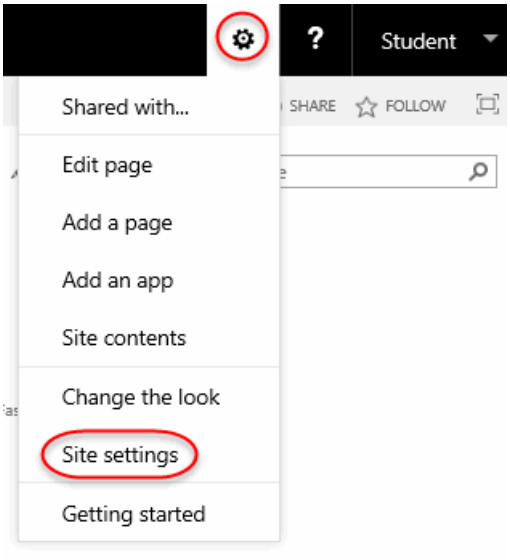
D. Verify that you get an **Access Required** page.



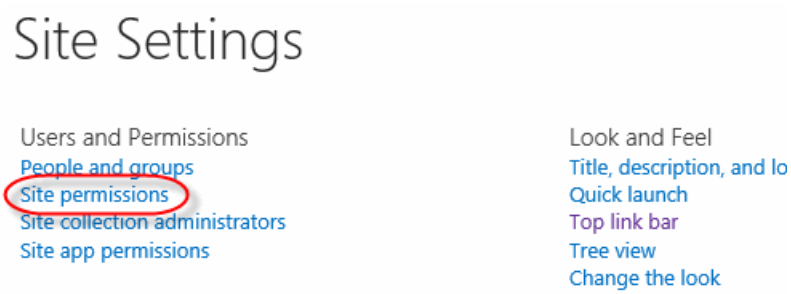
E. Leave the browser session you opened with the Homer account and switch back to the browser window opened with your student account.

2. Grant a new user Visitor permissions to your root team site.

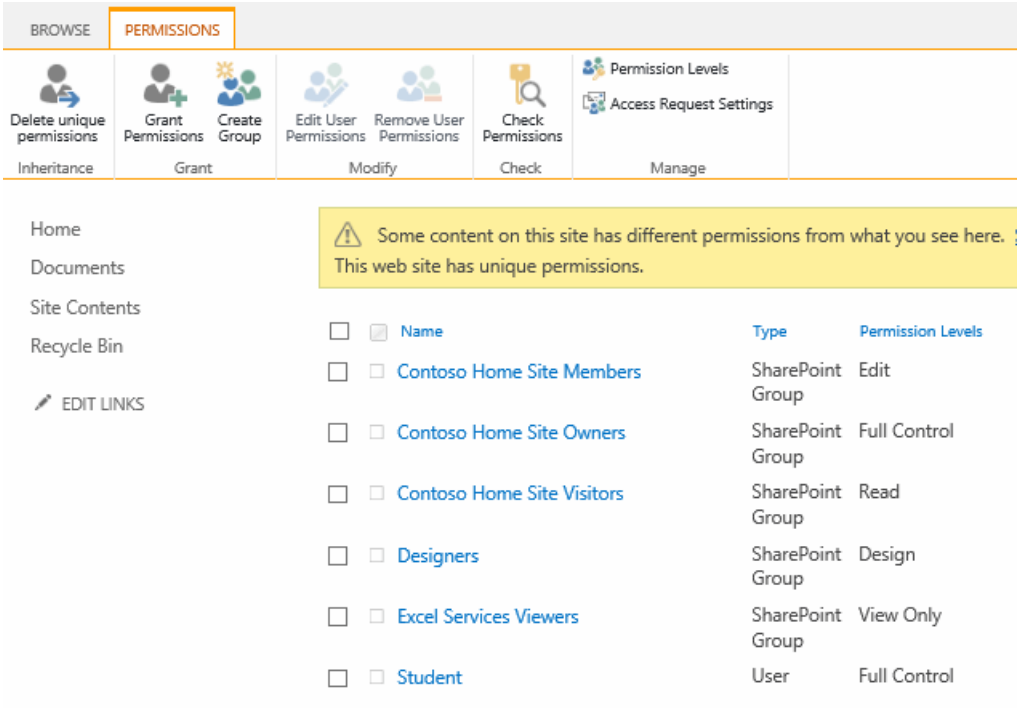
   A. In the browser window opened with your student account click the **Settings** menu link and then select the **Site settings** link from the available options.



B. Click the **Site permissions** link on the **Site Settings** page.

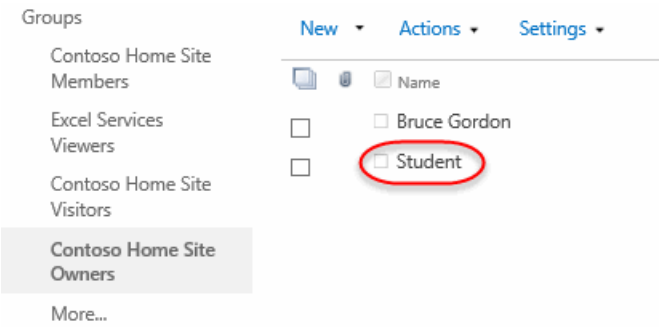


C. On the **Site Permissions** page, take a moment to read the existing entries and their **Permission Levels**.



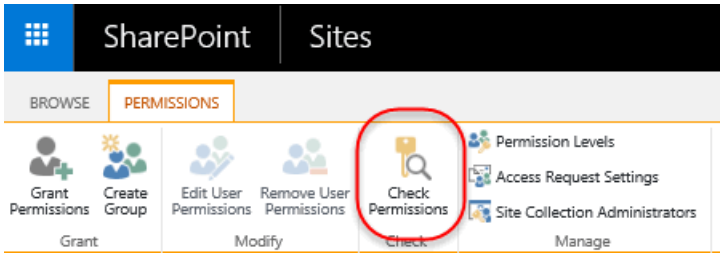
D. Click the **Contoso Home Site Owners** SharePoint group from the list to view its members.

E. In the **Owners** list page note that the account you are logged in with is a member. This gives you full permissions to the site.

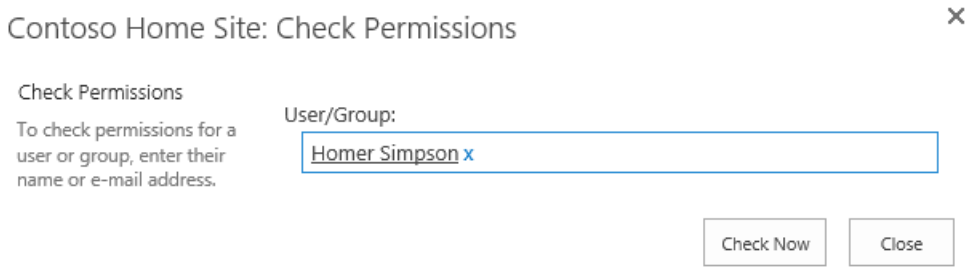


F. Use your browser's **Back** button to go back to the **Site Permissions** page.

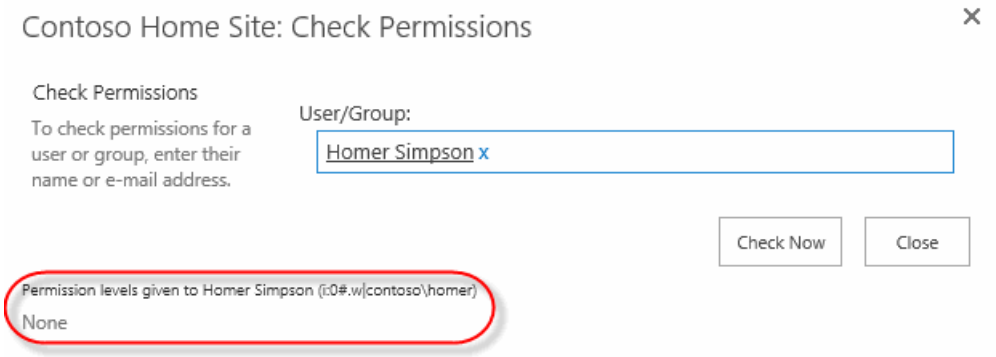
G. Click the **Check Permissions** link button in the **PERMISSIONS** tab toolbar.con



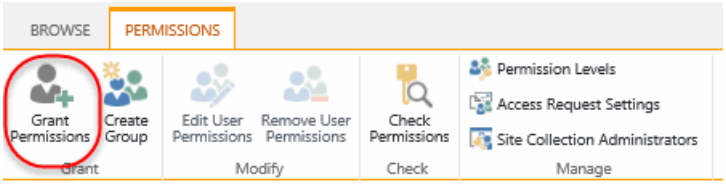
H. In the **Check Permissions** dialog form enter the account name of the account you attempted to log in earlier with in the **User/Group** field and click the **Check Now** button.



I. Verify that the results of the permissions check are **None**. Click the **Close** button to close the dialog form.

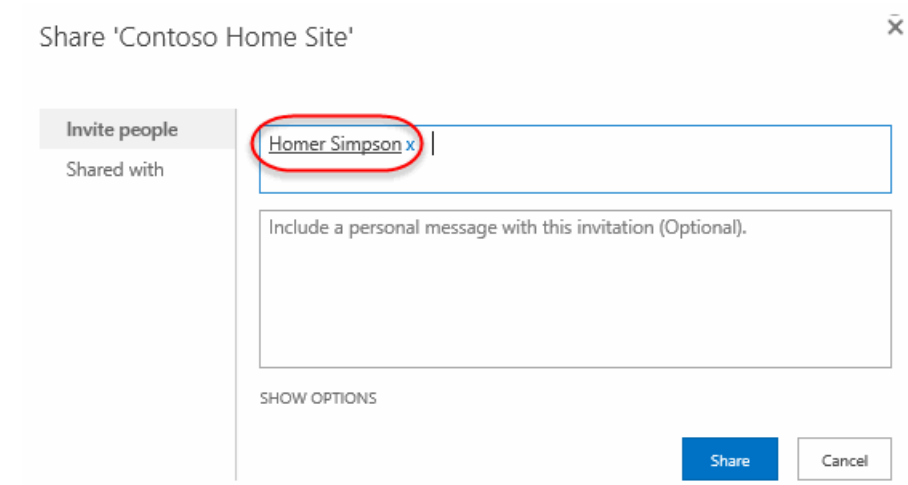


J. Click the **Grant Permissions** link button in the **PERMISSIONS** tab toolbar.



K. In the **Share** dialog form, type “Homer Simpson”, or any account name of the account that does not currently have permissions to the site in the

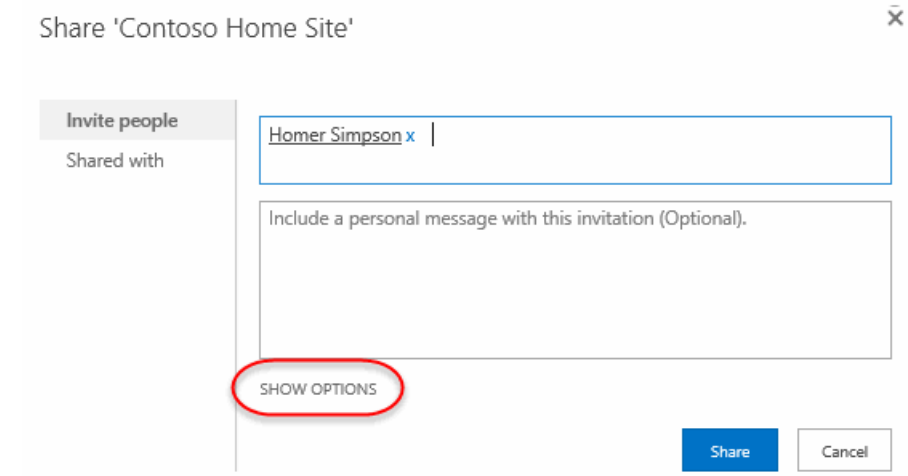
Invite people field. The name should resolve as you type and allow you to pick it from a drop-down list.



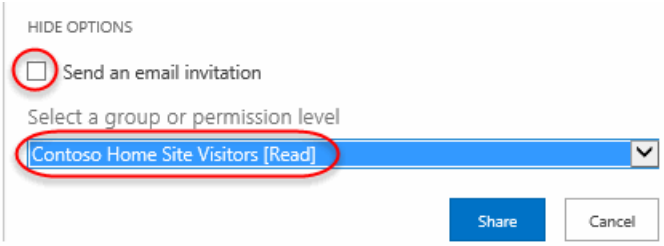
Note

You can also click the **SHARE** link in the upper-right corner of the page to open the same dialog.

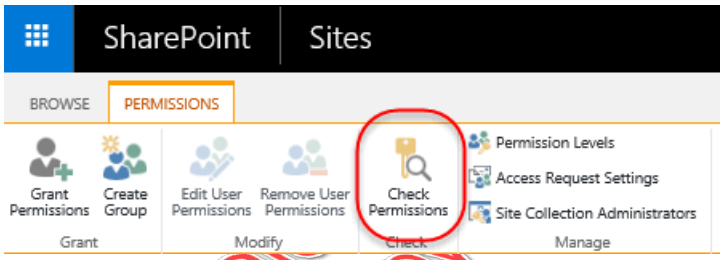
L. Click the **SHOW OPTIONS** link to see the permission options.



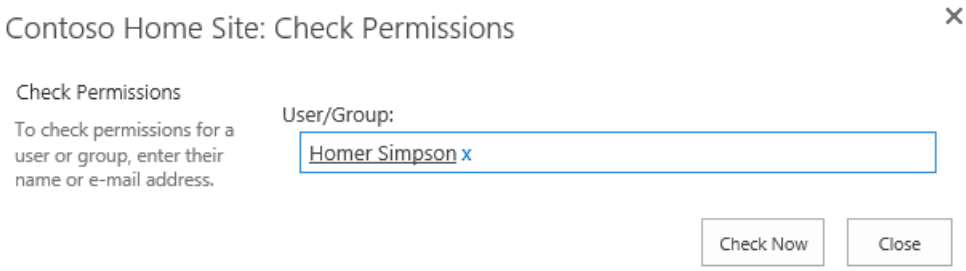
M. Uncheck the **Send an email invitation** check box and change the **Select group or permission level** list box to **Contoso Home Site Visitors [Read]**. Click the **Share** button to complete the permissions assignment.



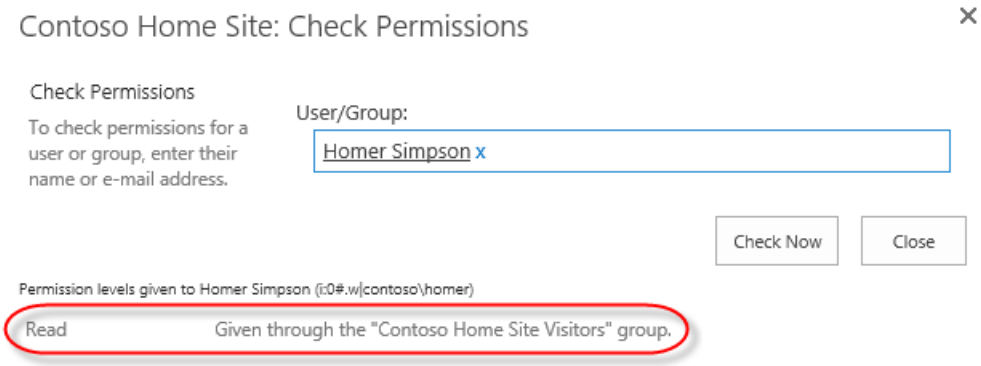
N. To verify that the account has the correct permissions now, click the **Check Permissions** link button in the **PERMISSIONS** tab toolbar.



O. In the **Check Permissions** dialog form, enter 'Homer Simpson' or whatever account you just added, in the **User/Group** field and click the **Check Now** button.



P. Verify that the results of the permissions check now is **Read**. The results should be similar to the following image. Click the **Close** button to close the dialog form.

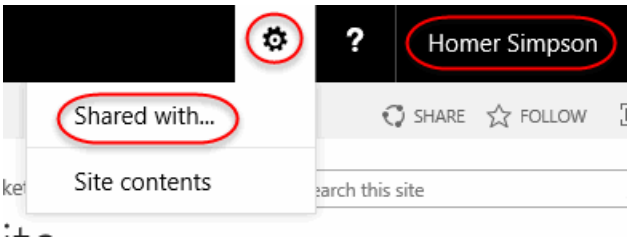


3. Test the permissions to verify they have **Read** permissions to the site.
   A. Switch back to the browser window you opened at the beginning of the exercise as "Homer" or whichever account you used.
   B. Retype the URL of your home site.

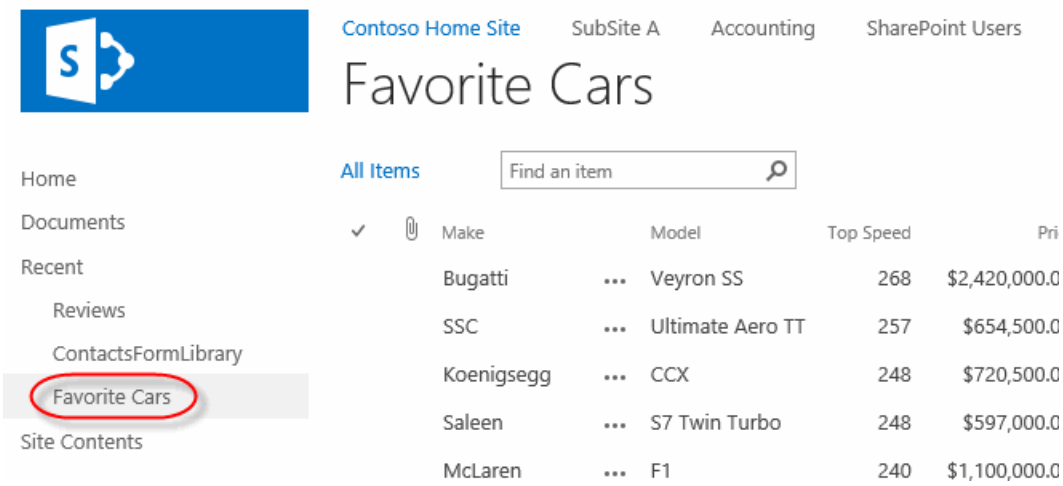
Note

Note that just refreshing the page **does not** work. That will just refresh the request access page.

   C. Verify that the account can now see the **Home** page of your root team site.
   D. Click the **Settings** drop-down button and note that the items listed are security trimmed based on rights.

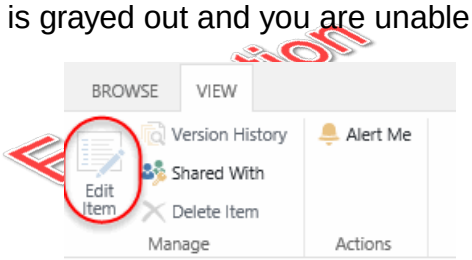


   E. Click the **Favorite Cars** list in the **Quick Launch** menu and verify that you can see the items in the list.



F. Click the **Bugatti** link within the **Favorite Cars** list to view its properties.

G. Note that the **Edit Item** button on the **VIEW** toolbar in the **Favorite Cars - Bugatti** form is grayed out and you are unable to click it.



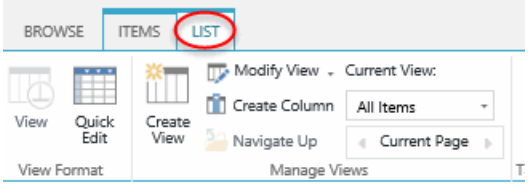
H. Click the **Close** button to close the **Favorite Cars - Bugatti** form.

4. Grant visitor account edit permissions to the **Favorite Cars** list.

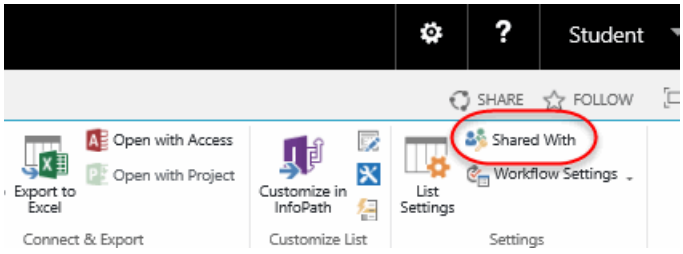
A. Switch back to the browser window logged in with your student account that has owner permissions.

B. Click the **Favorite Cars** link in the **Quick Launch** menu.

C. Click the **LIST** tab to open the toolbar.



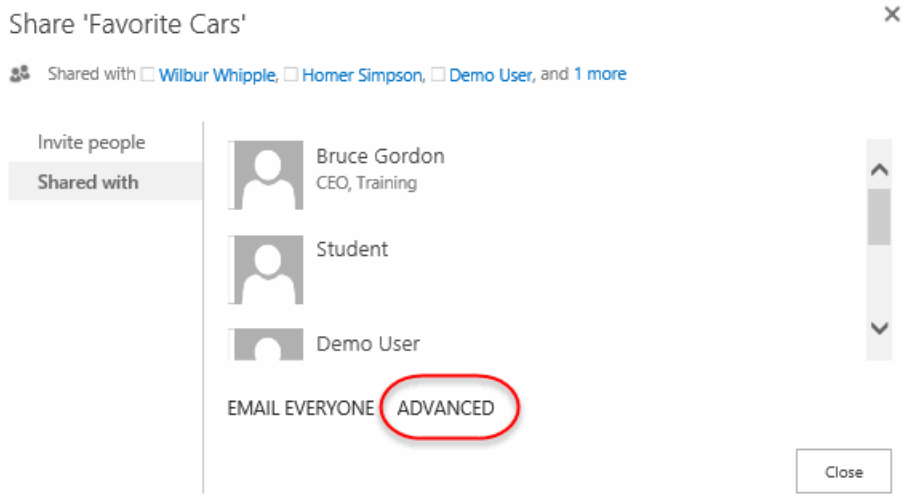
D. Click the **Shared With** icon within the **Settings** region on the **LIST** tab toolbar.



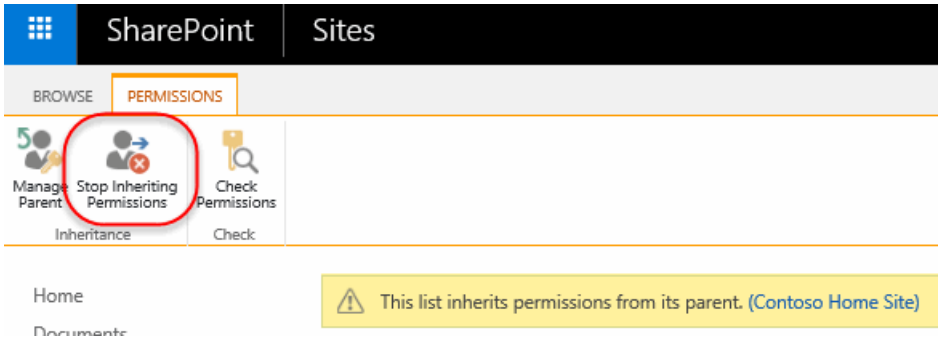
Note

The **Shared With** icon text may or may not be displayed depending on the size of your browser window.

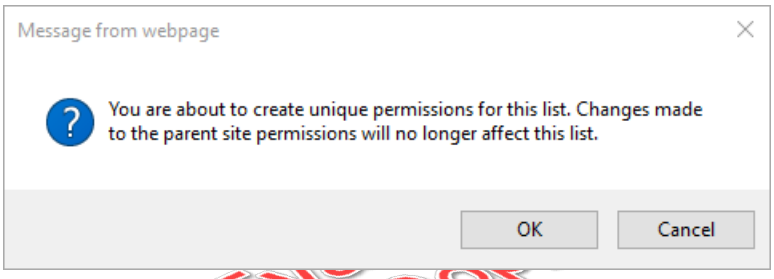
E. Click the **ADVANCED** link on the **Shared With** dialog.



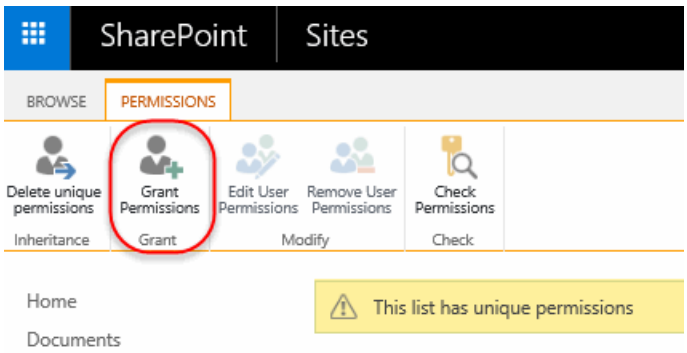
F. Click the **Stop Inheriting Permissions** link button in the **PERMISSIONS** tab toolbar.



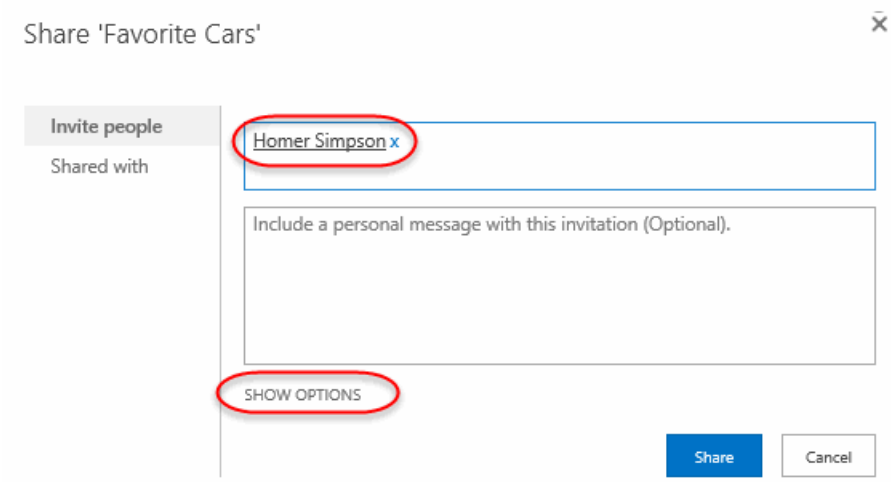
G. Click **OK** to the **Message from web page** dialog window to accept the change.



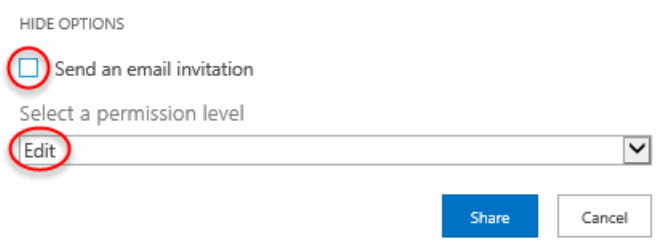
H. Note that the **PERMISSIONS** toolbar has changed now that it is no longer inheriting permissions from the parent site. Click the **Grant Permissions** link button.



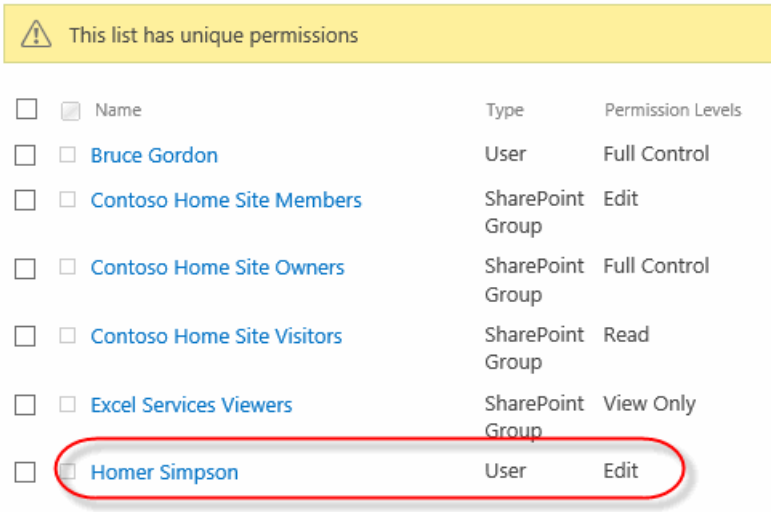
I. In the **Share 'Favorite Cars'** dialog form, type the user account you want to grant permissions, 'Homer Simpson', in the **Invite people** field and click the **SHOW OPTIONS** link.



J. Uncheck the **Send an email invitation** check box and leave the **Select a permission level** set to **Edit** and click the **Share** button.

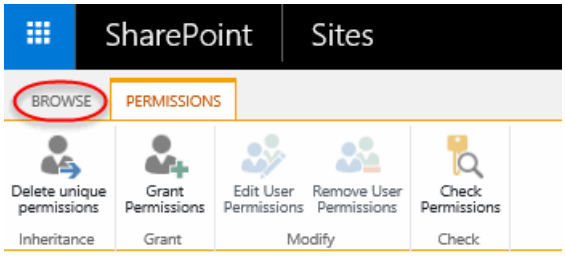


K. Note that the user account is now in the permissions list for **Favorite Cars** with **Edit** permissions.

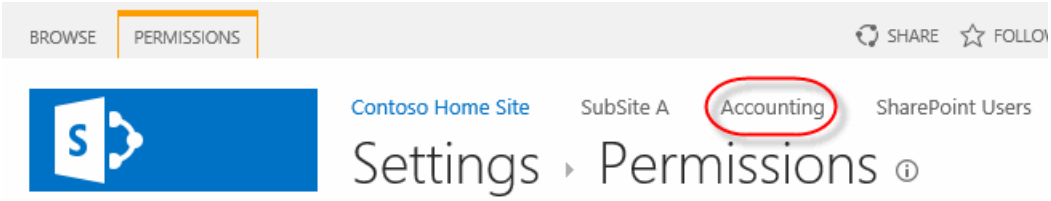


5. Grant an account **Full Control** permissions to the **Accounting** child site.

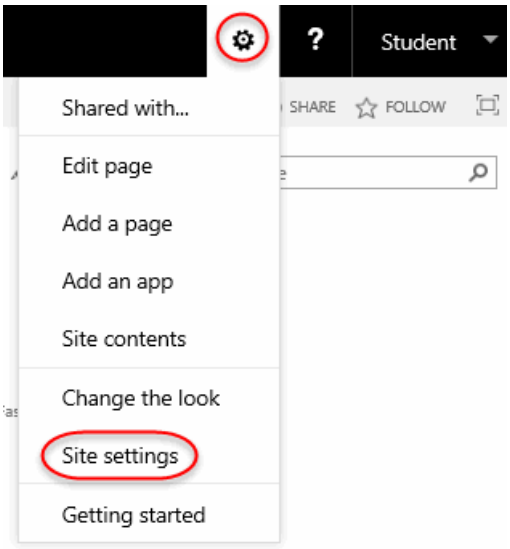
A. Click the **BROWSE** tab to close the **PERMISSIONS** toolbar.



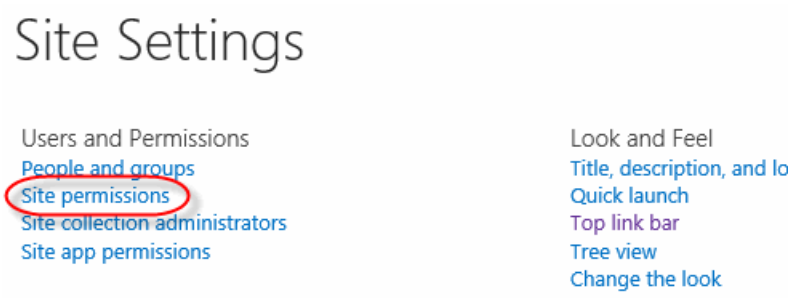
B. Click the **Accounting** link in the **Top Link Bar** of the root team site.



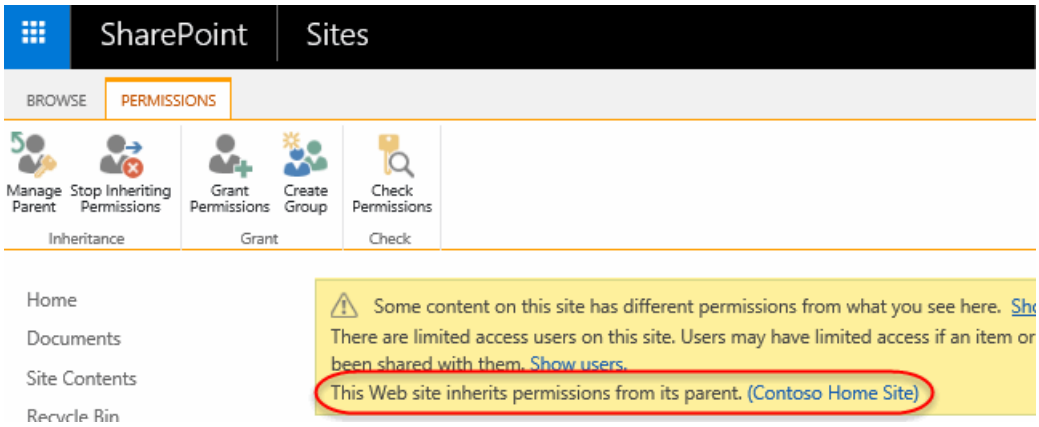
C. Click the **Settings** menu link and then select the **Site settings** link from the available options.



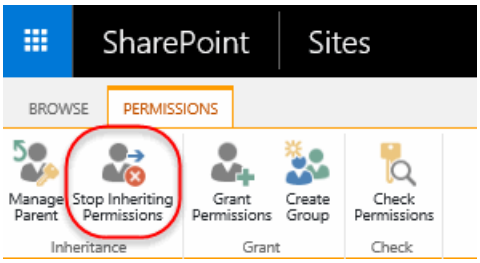
D. Click the **Site permissions** link on the **Site Settings** page.



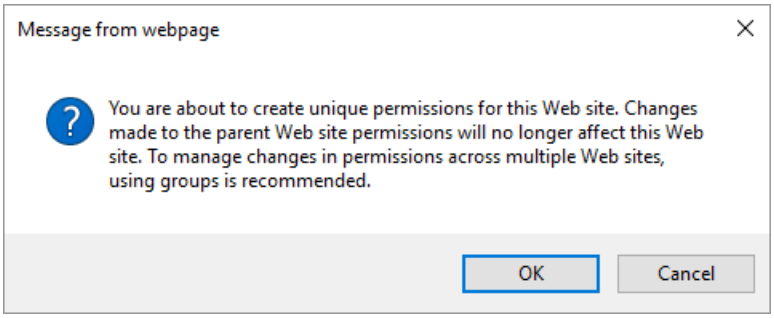
E. Note that the permissions of the **Accounting** site are inheriting the permissions of its parent site.



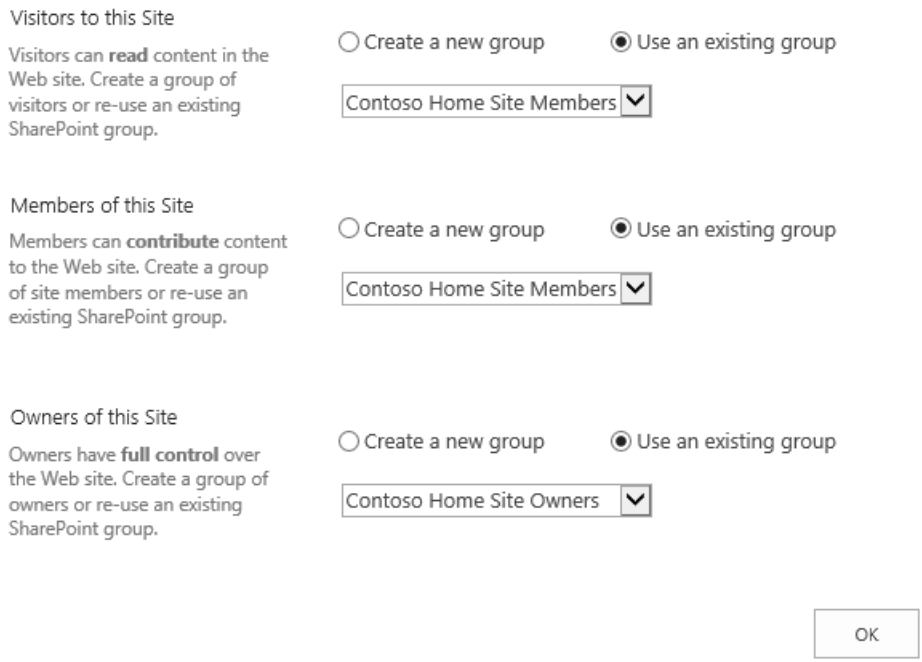
F. Click the **Stop Inheriting Permissions** button on the **PERMISSIONS** tab toolbar.



G. Click the **OK** button on the **Message from web page** dialog window to accept the unique permissions setting.

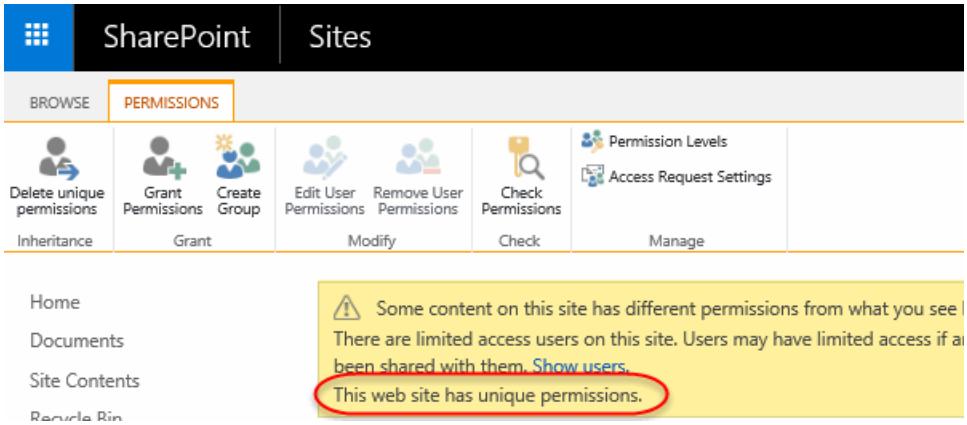


H. When the inheritance is broken you are given the option of **Use an exiting group** or **Create a new group**. Leave it set to the default and click the **OK** button.

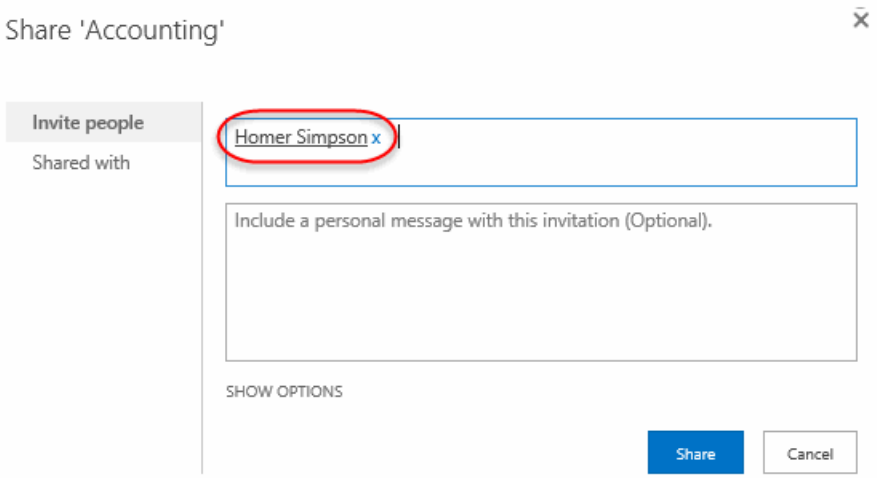


I. Repeat the earlier steps to navigate back to the **Site permissions** page for the **Accounting** site.

J. Note that the **PERMISSIONS** toolbar has changed now that the site has unique permissions. Click the **Grant Permissions** button.



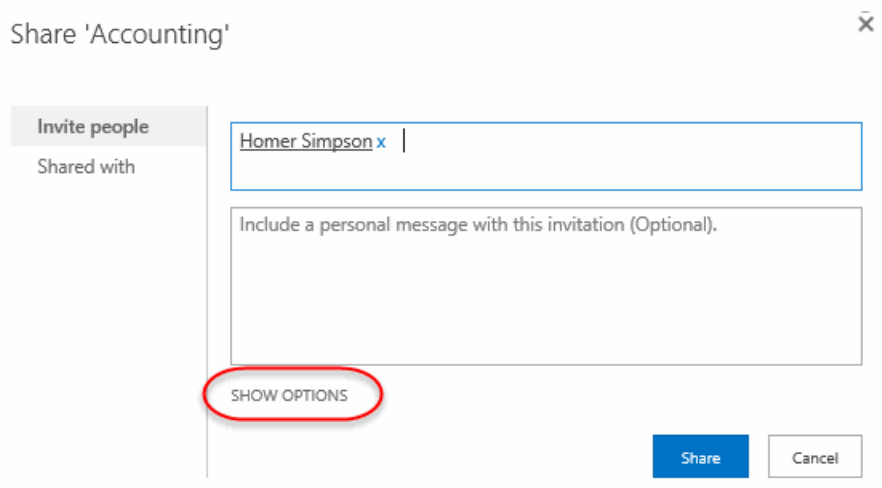
K. In the **Share** dialog form, type “Homer Simpson”, or any account name of the account that does not currently have permissions to the site in the **Invite people** field. The name should resolve as you type and allow you to pick it from a drop-down list.



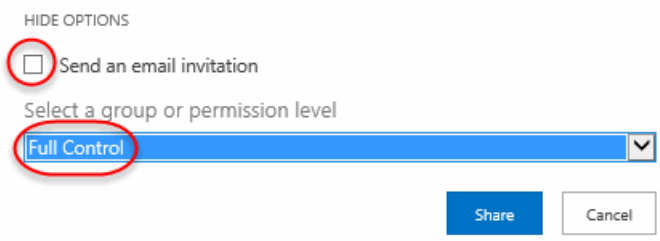
Note

You can also click the **SHARE** link in the upper-right corner of the page to open the same dialog but it doesn’t have the same choices in the **SHOW OPTIONS** list.

L. Click the **SHOW OPTIONS** link to see the permission options.



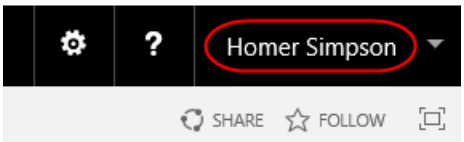
M. Uncheck the **Send an email invitation** check box and select **Full Control** from the **Select a group or permission level** list-box options.



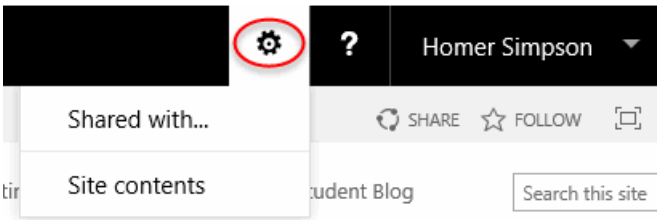
N. Click the **Share** button at the bottom of the **Share 'Accounting'** dialog form to save your changes.

6. Test the new permissions given to account in the **Favorite Cars** list and the **Accounting** child site.

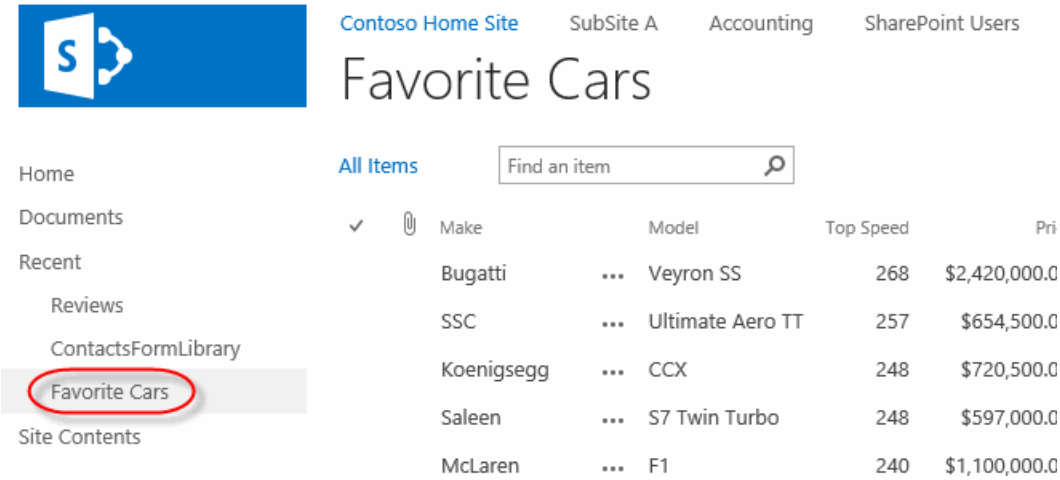
   A. Switch back to the browser window logged in as 'Homer Simpson' or whatever account your are testing.



   B. Click the **Settings** drop-down button and note that the options are still limited to the user in the root team site.

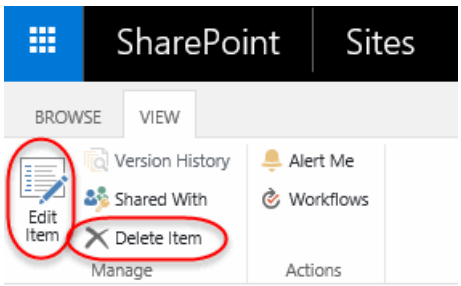


C. Click the **Favorite Cars** list in the **Quick Launch** menu and verify the user account can see the items in the list.



D. Click the **Bugatti** link within the **Favorite Cars** list to view its properties.

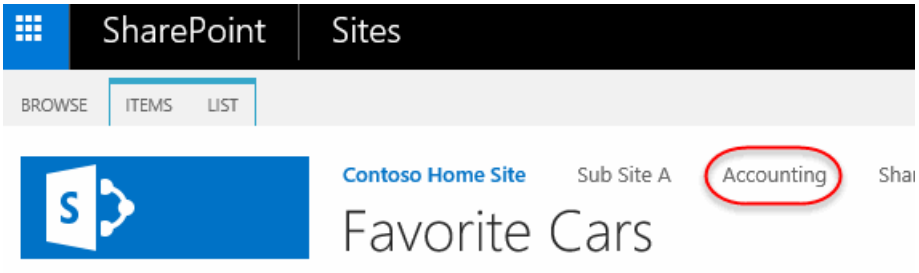
E. Note that the **Edit Item** button and **Delete Item** button on the **View** toolbar in the **Favorite Cars - Bugatti** form are available to the user to use.



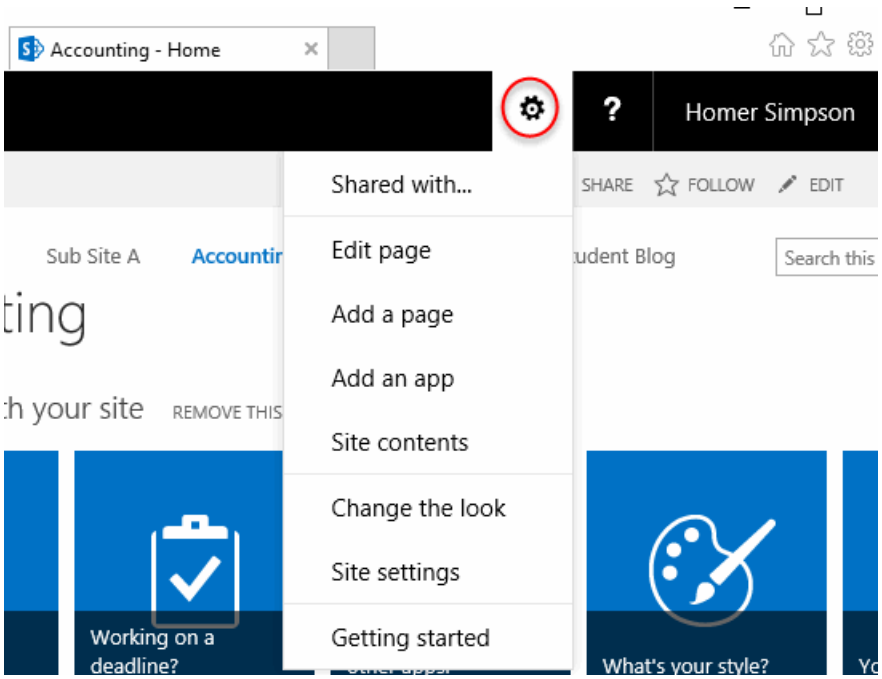
Feel free to test the user's editing abilities by changing any of the values you like.

F. Click the **Close** button on the **Favorite Cars - Bugatti** form.

G. Click the **Accounting** link in the **Top Link Bar** of the root site.



H. Click the **Settings** menu in the **Accounting** site and note that the user account has full access to all the items in the menu due to the **Full Control** permissions at this child site.



I. Optional: Take a few moments and test any action in the **Accounting** site logged in with the new account to verify their permissions.

Conclusion

In this lesson, you have learned:

- About SharePoint groups.
- How to create SharePoint groups.
- How to assign permission in SharePoint.

- How to view permission levels.
- How to manage permission inheritance at the site level.
- How to manage permission inheritance at the list or library level.
- How to manage permission inheritance at the item level.

LESSON 11

Participating in User Communities

Topics Covered

☑ Editing a personal profile.

☑ Managing newsfeeds.

☑ Adding people newsfeeds.

☑ Adding documents newsfeeds.

☑ Adding sites newsfeeds.

☑ Following tags.

☑ Storing personal content.

Introduction

SharePoint offers users a place for social collaboration in the form of personal sites. The experience and functionality is very similar to popular social media sites such as Facebook and LinkedIn. The main difference being that it is controlled by the SharePoint Farm and exposure is typically limited to internal networks.

11.1. Configure User Profiles and My Sites

Information about people within a SharePoint organization comes primarily through SharePoint **User Profiles**. User Profiles are managed by the User Profile Service that comes with SharePoint Server, the pay version, but must be provisioned by the Farm administrator. As part of the provisioning process the Farm administrator creates a special Site Collection for hosting **My Sites**. In addition to creating the **My Sites** host the Farm administrator typically configures a synchronization connection with a directory system such as Active Directory. It is from this synchronization connection that User Profiles are populated with information such as email addresses and company information. Users have the ability to add and edit some information to their profiles as well as decide who can view the information. Profile fields that are imported from Active Directory default to

read-only and that includes the **Show To** option. The Farm administrator can change the default edit ability of these fields as well as add new custom fields.

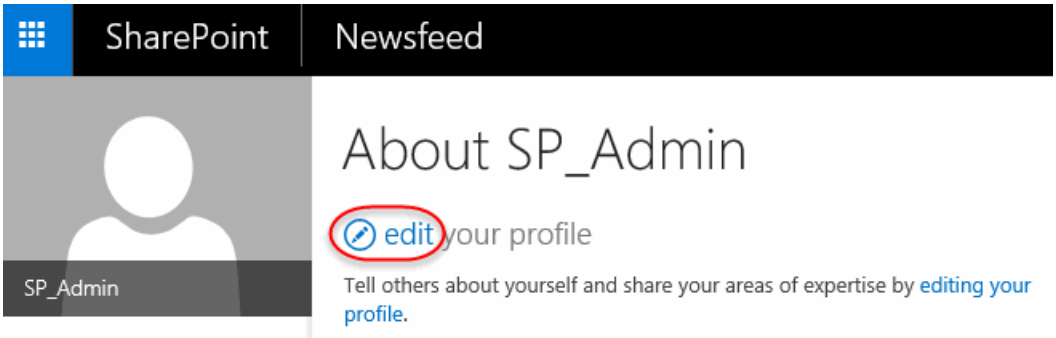
The following walk-through will show you how to edit the profile for the account. This walk-through uses an account named "SP_Admin" but any account will do.

Note

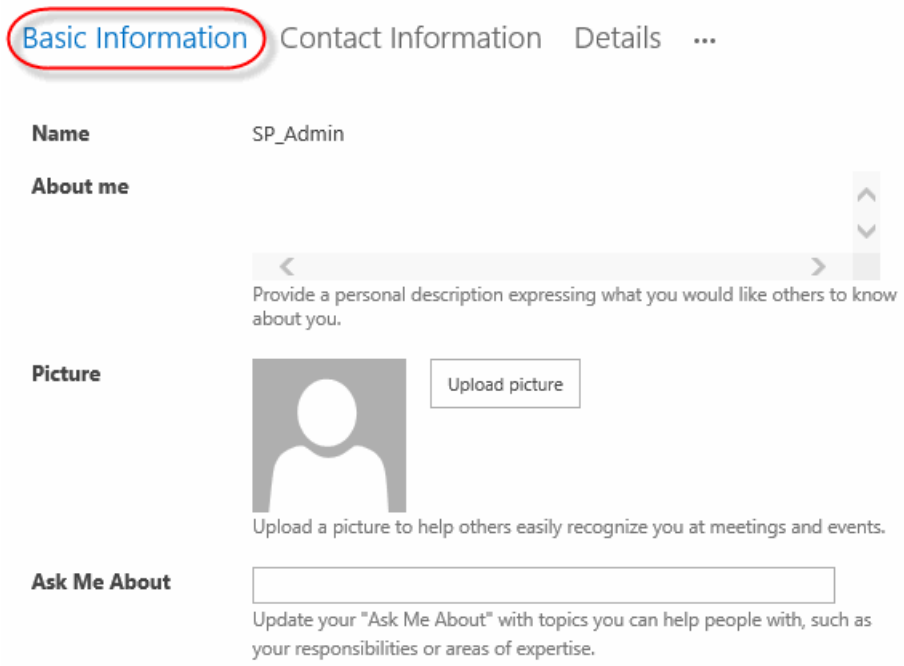
These same steps are performed as part of the exercise with this lesson so unless you have a separate account you want to perform the walk-through steps on, you should wait to perform them in the exercise.

1. Edit the profile for your user account.
   A. Click the **Open Menu** drop-down menu and select the **About Me** option.

   B. Click the **edit** link on the **About** page.



   C. Use the following list of information to fill in the fields for the **Basic Information** in your profile.
      - **About me:** "SharePoint Administrator."
      - **Ask Me About:** "Configuring SharePoint."



D. Click the **Upload Picture** button in the **Picture:** field for the profile.

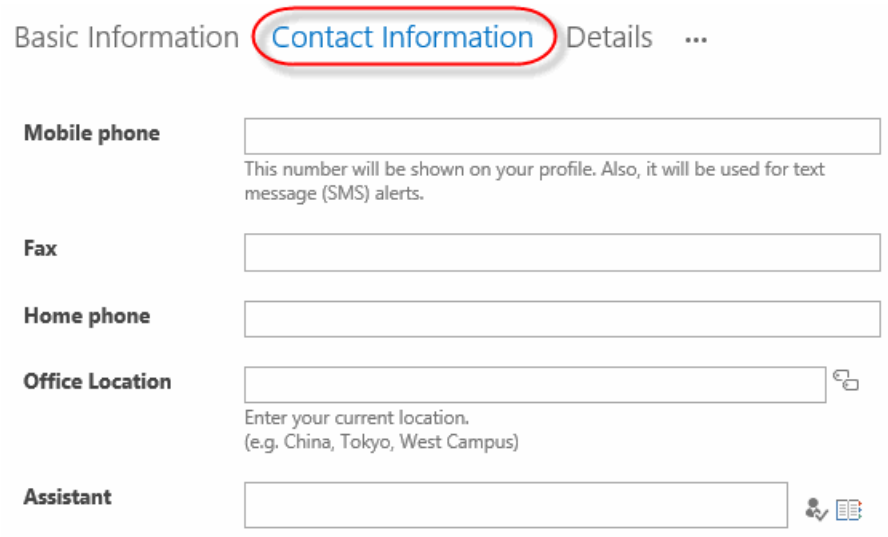
E. Click the **Browse…** button on the **Choose a Picture** dialog.

F. Navigate to the folder you downloaded the class files to and select the `pair-of-students.jpg` file. Click the **Open** button of the **Choose File to Upload** dialog window.

G. Click the **Upload** button of the **Choose a picture** dialog to save your selection.

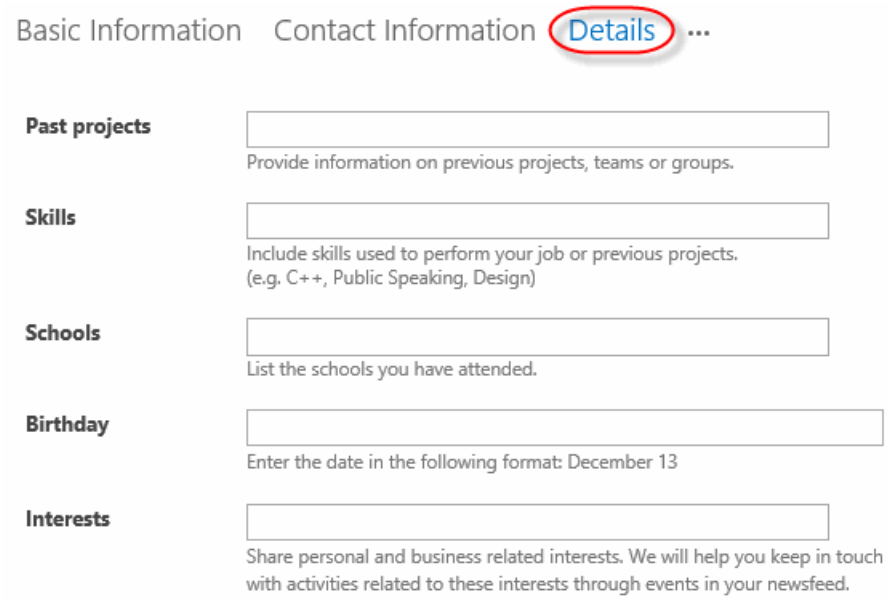
H. Click the **Contact Information** link and use the following list of information to fill in the fields.

- **Mobile phone:** “950-852-5555”
- **Fax:** “950-852-4444”
- **Home Phone:** “950-864-1234”
- **Office Location:** “Shangri-La”
- **Assistant:** “Homer”



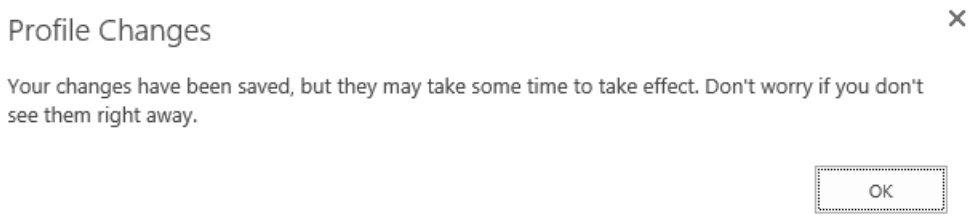
I. Click the **Details** link and use the following list of information to fill in the fields.

- **Past projects:** "SharePoint 2016 installation"
- **Skills:** "HTML, CSS, SharePoint Designer, Visual Studio and C#, Active Directory"
- **Schools:** "University of Redmond"
- **Birthday:** "November 05"
- **Interests:** "Building bird houses."



J. Click the **Save and Close** link at the bottom of the form.

K. Click the **OK** button on the **Profile Changes** dialog.



11.2. Newsfeeds

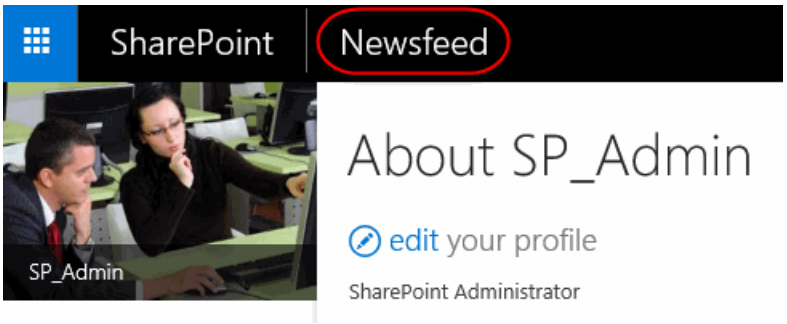
Newsfeeds in SharePoint 2016 provide a way to track people, documents, sites, and interests (tags). Newsfeeds are accessed and managed through your user profile.

The following walk-through will explore creating and managing newsfeeds.

Note

These same steps are performed as part of the exercise with this lesson, so, unless you have a separate account you want to perform the walk-through steps on, you should wait to perform them in the exercise.

1. Click the **Newsfeed** link in the top-left corner of the browser.



Note

There is also a **Newsfeed** link in the **Quick Launch** of your user profile page. The link on your profile's **Quick Launch** navigates to the same location at the link in the upper-right corner of the browser.

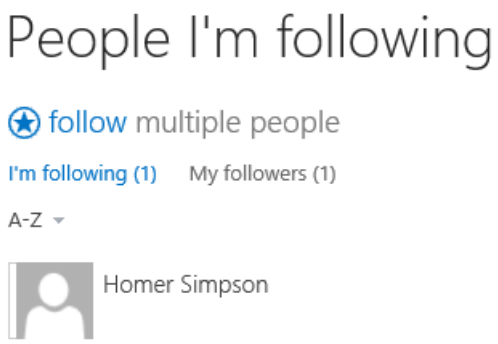
2. Note the options, **people**, **documents**, **sites**, and **tags** listed under the heading **I'm following**.

3. Remain on the **Newsfeed** page for **SP_Admin** for the next walk-through.

11.3. People Newsfeeds

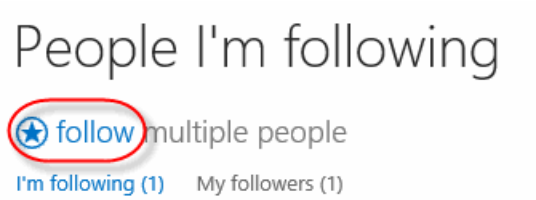
The **people** newsfeeds allow you to follow posting of other users in your organization. The following walk-through will explore how to follow users and post messages.

1. Click the number **1** link listed above **people**.
2. Note that **Homer Simpson** was added because of the previous walk-through when his account was specified as the assistant for SP_Admin.

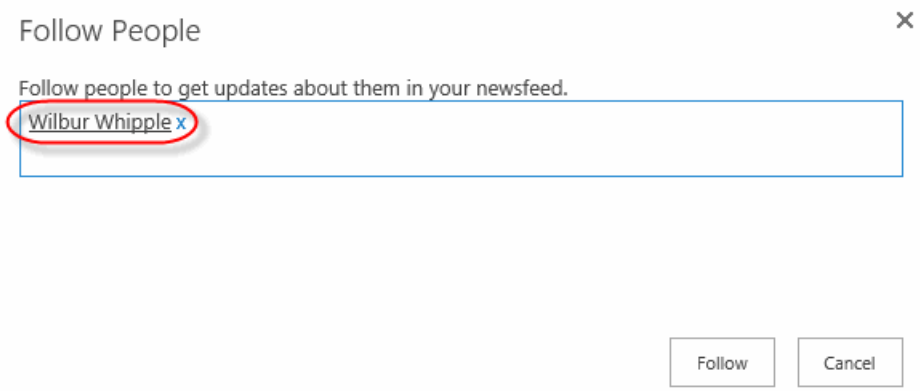


3. Add a **follow** for Wilbur Whipple.

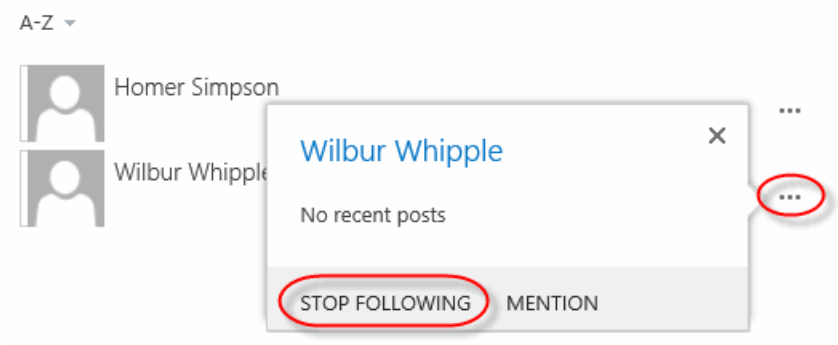
   A. Click the **follow** link on the **People I'm following** page.



   B. Type "Wilbur Whipple" in the **Follow people to get updates about them in your newsfeed** field of the **Follow People** dialog and click the **Follow** button.

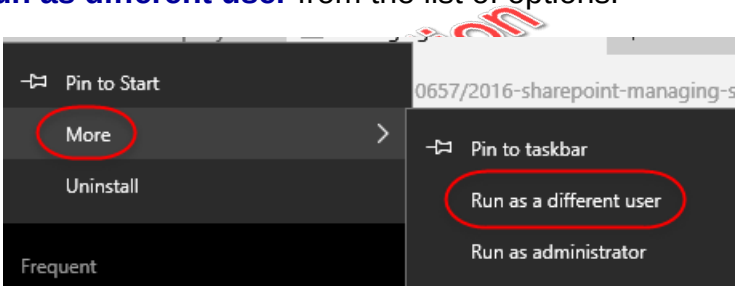


   C. **Wilbur Whipple** now displays as a person you are following. Note that you can remove a following by clicking the ellipsis link nest to their name, **do not** remove Wilbur at this time.



4. Add a newsfeed entry logged in as Wilbur Whipple.

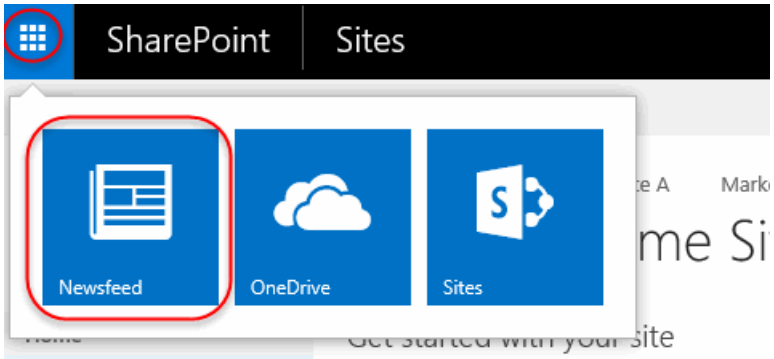
   A. Right-click your browser icon and choose the **More** option and then choose **Run as different user** from the list of options.



   B. In the **Widows Security** dialog window, enter “Wilbur” for the account name and “Pa$$w0rd” for the password. Click the **OK** button to complete the logon.

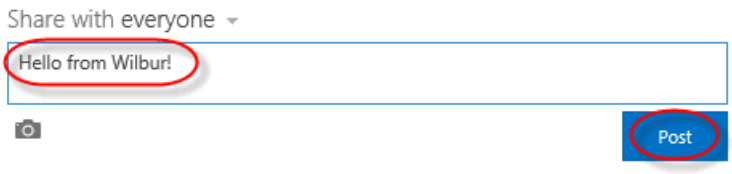
   C. Try to navigate to root of your team site.

   D. Click the checkered icon in the upper left corner of the browser window and then click **Newsfeed** from the list of options.



E. If prompted for credentials enter “Wilbur” for the account name and “Pa$$w0rd”.

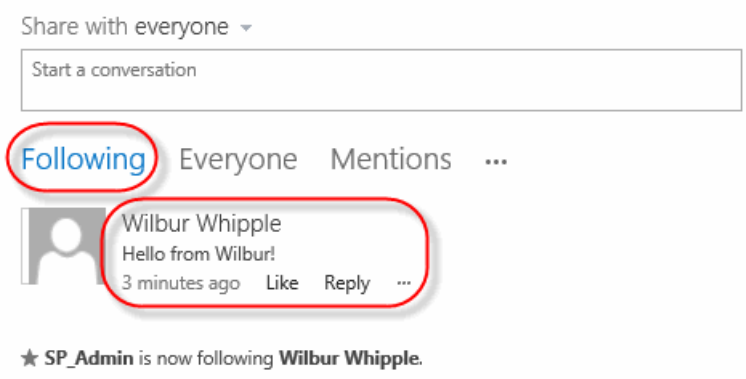
F. Type “Hello from Wilbur!” in the **Share with everyone** field and click the **Post** button.



5. View the newsfeed from Wilbur as SP_Admin.

   A. Switch back to the browser window logged in as **SP_Admin** and click the **Newsfeed** link.

   B. Note the new entry under the **Following** heading posted by **Wilbur Whipple**.

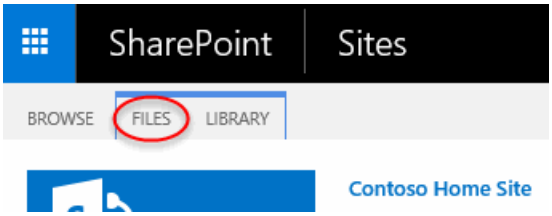


11.4. Documents Newsfeed

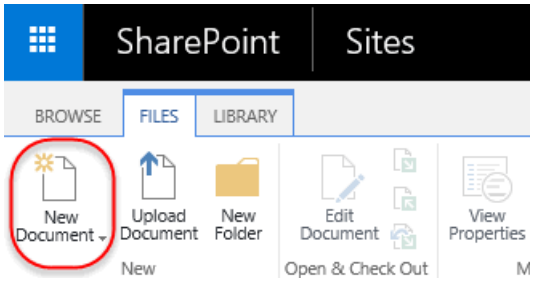
The **documents** newsfeed allows you to track changes to documents that you are interested in. The following walk-through will demonstrate how to configure a **documents** newsfeed.

1. In the browser window logged in as **SP_Admin** navigate back to the home page of the team site.

2. Create a new document in the **Documents** library.
   A. Click the **Documents** link in the sites **Quick Launch** menu.
   B. Click the **FILES** tab to open the toolbar.

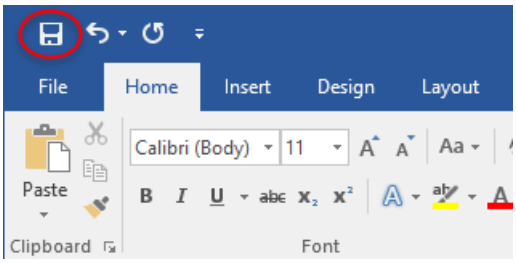


   C. Click the **New Document** button on the **FILES** tab toolbar.

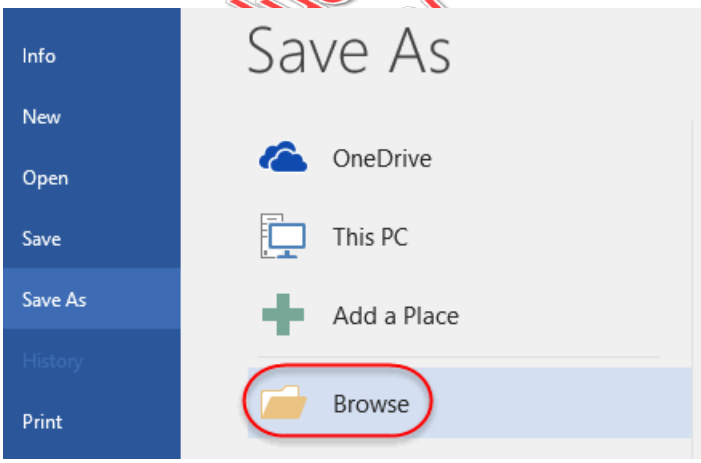


D. Type “Demo document for newsfeed” in the body of the document.

E. Click the **Save** icon in the upper-left corner of the Word window.



F. Click the **Browse** link on the **Save As** page.



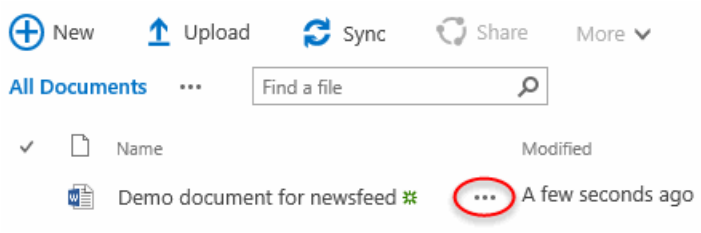
G. Leave the file name at its default value and click the **Save** button on the **Save As** dialog window.

H. Close Microsoft Word.

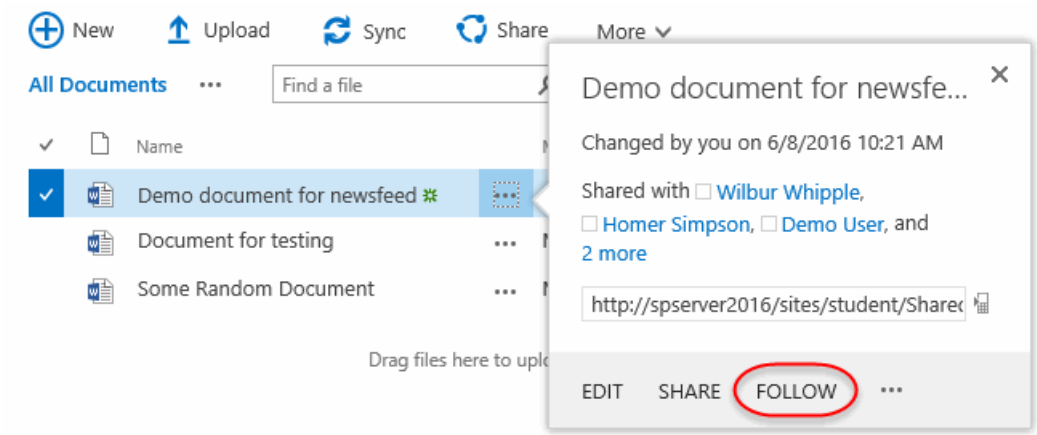
3. Add a document to your personal newsfeed.

A. Click the **Documents** link in the sites **Quick Launch** menu to refresh the contents.

B. Click the **ellipsis** button next the **Demo document for newsfeed** document.

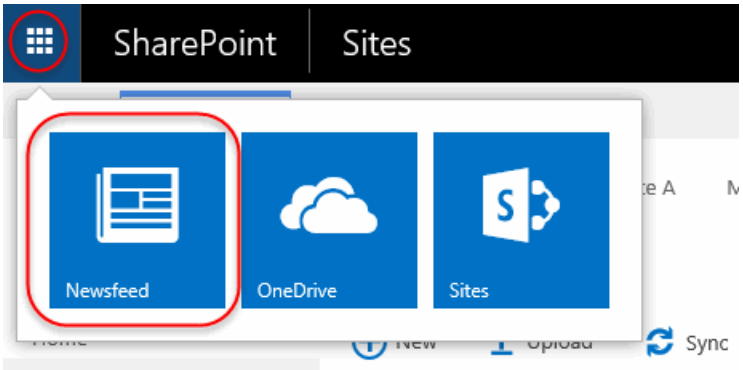


C. From the item menu balloon pop-up click the **FOLLOW** link.

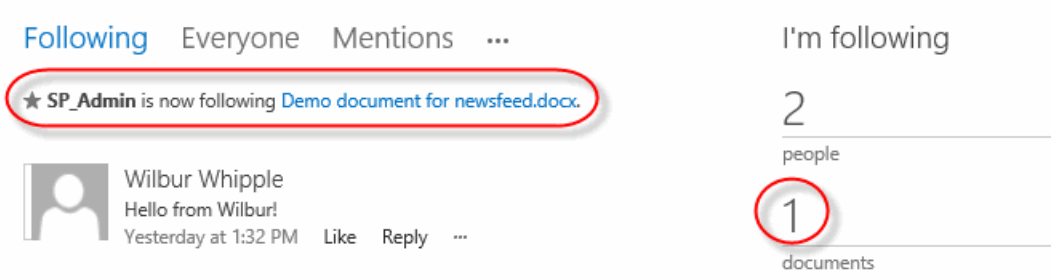


4. Verify the document is now tracked as part of your personal newsfeed.

A. Click the **checkered icon** link in the top-left corner of the browser window and choose **Newsfeed** from the list of options.



B. Note the new entry under the **Following** list and the number has increased for **documents**.



C. Click the number **1** link above the **documents** label to view followed documents.

D. Note the list of **Docs I'm following** and the link that allows you to **Stop following**.

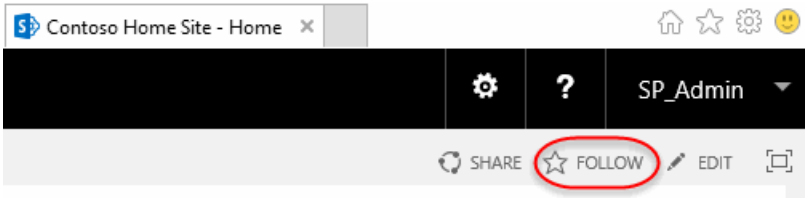
11.5. Sites Newsfeed

The **sites** newsfeed tracks changes to a site such as new posts, new lists, new libraries etc. The following walk-through will demonstrate how to follow a site in your personal newsfeed.

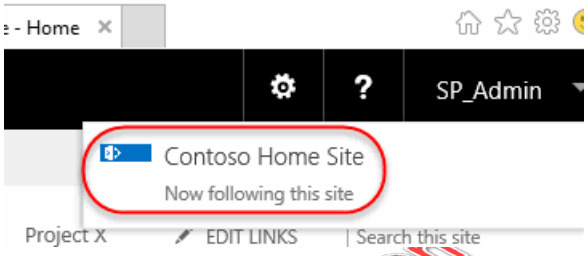
1. In the browser window logged in as **SP_Admin** navigate back to the home page of the team site.

2. Follow the **Contoso Home Site**.

   A. Click the **FOLLOW** link in the upper-right corner of the browser window.

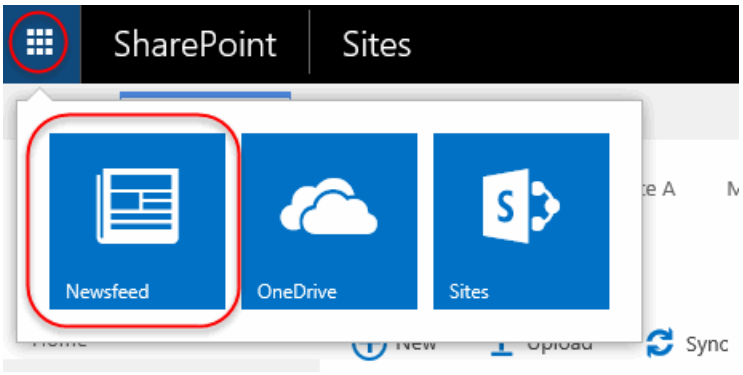


B. Note the confirmation pop-up notifying you are now following the site.

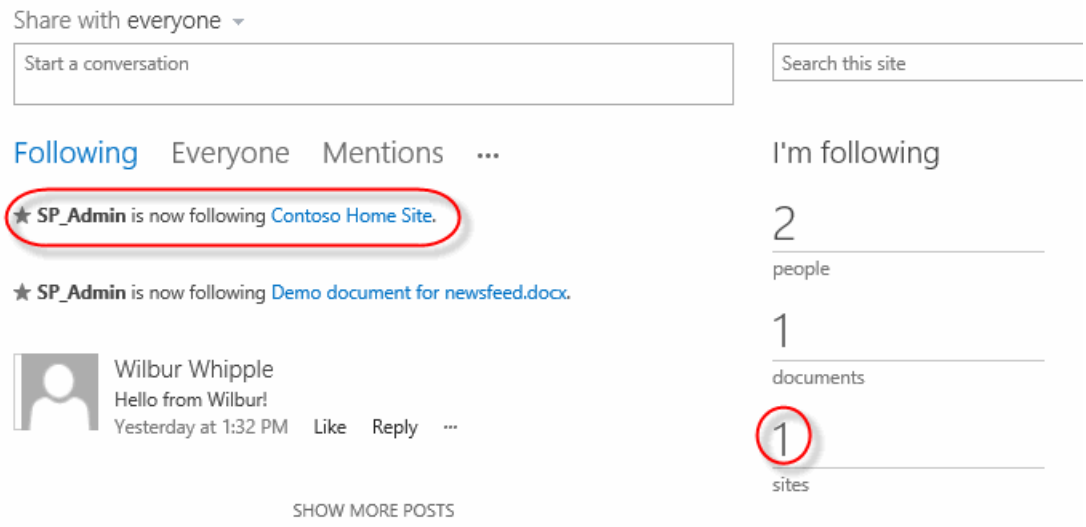


3. Verify the site is now listed under your personal newsfeeds.

   A. Click the **checkered icon** link in the top-left corner of the browser window and choose **Newsfeed** from the list of options.

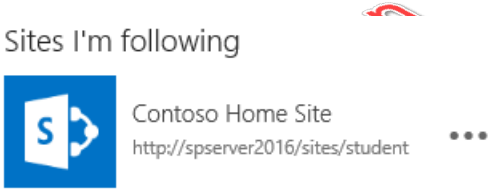


   B. Note the new entry under the **Following** list and the number has increased for **sites**.



C. Click the number **1** link above the **sites** label to view followed sites.

D. Note the list of **Sites I'm following** and the link that allows you to **Stop following**.

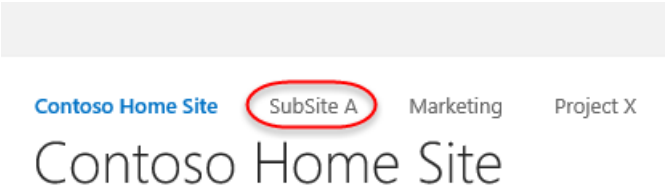


11.6. Tags Newsfeed

The **tags** news feed allows you to track keywords posted in site newsfeeds in your own personal newsfeed. Any time a post is made and a word is prefixed with a "#" that word can be used as a tag. The following walk-through will demonstrate how to add tags to your personal newsfeeds.

1. In the browser window logged in as **SP_Admin** navigate back to the home page of the team site.

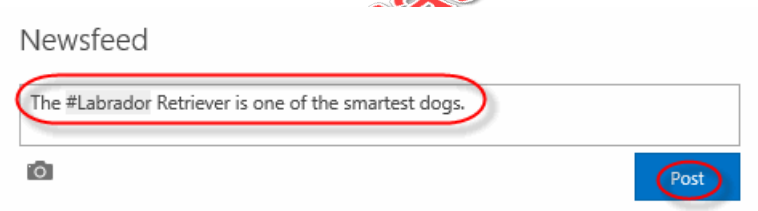
2. Click the **SubSite A** link to navigate to the home page of the site.



3. Create a **Newsfeed** post using a "#" to tag a keyword.

   A. Click the **Start a conversation** text inside the **Newsfeed** field on the home page of **SubSite A**.

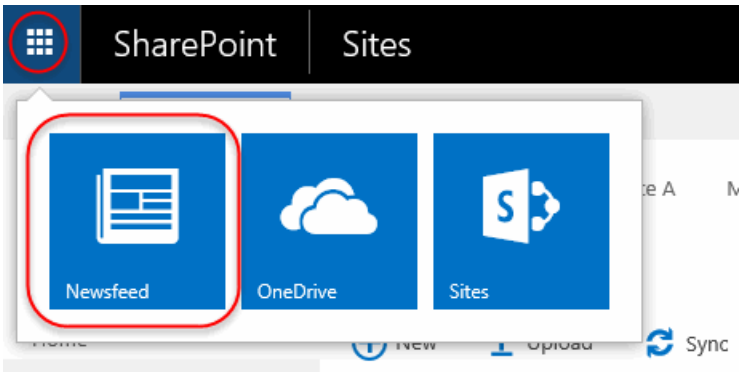
   B. Type "The #Labrador Retriever is one of the smartest dogs" in the **Newsfeed** field and click the **Post** button.



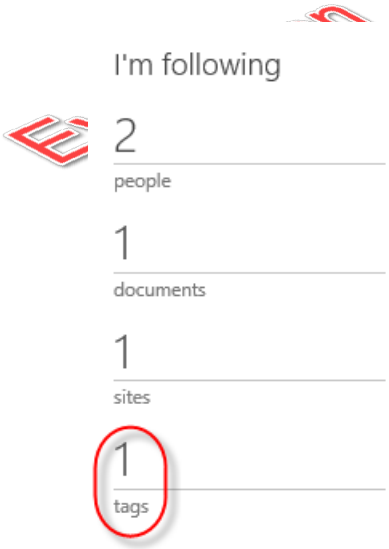
4. Add the #Labrador tag to the personal **newsfeed** for SP_Admin and verify the new tag.

   A. Click the **Follow #Labrador** link below the new post.

B. Click the **checkered icon** link in the top-left corner of the browser window and choose **Newsfeed** from the list of options.

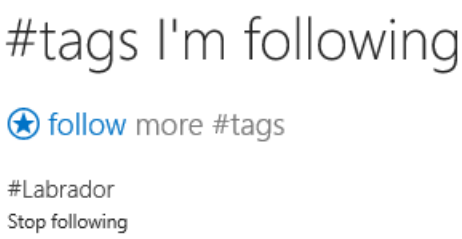


C. Note the number has increased for **tags**.



D. Click the number **1** link above the **tags** label to view followed sites.

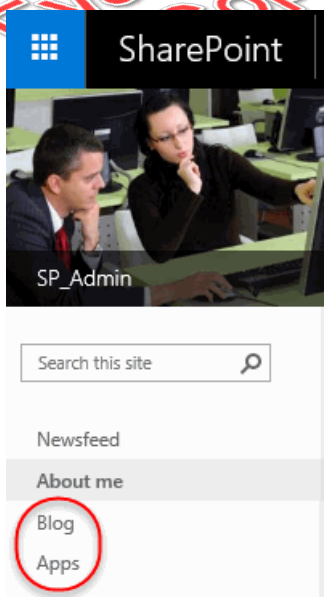
E. Note the list of **#tags I'm following** and the link that allows you to **Stop following**.



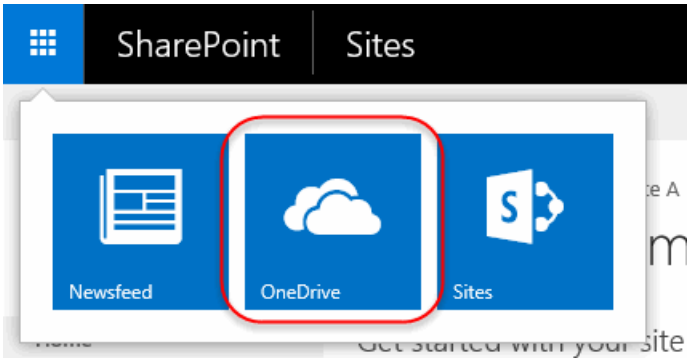
11.7. Managing Personal Sites

In addition to storing user in formation in the form of a profile SharePoint offers users their own personal SharePoint site collection. This site is like any other SharePoint site in that users can create lists and libraries and edit the home page.

The default content of a users personal site can be accesses through the two links **Blog** and **Apps** listed under their profiles **Quick Launch** menu.



A users personal site includes a **Documents** library that can easily be accessed through the **OneDrive** link.

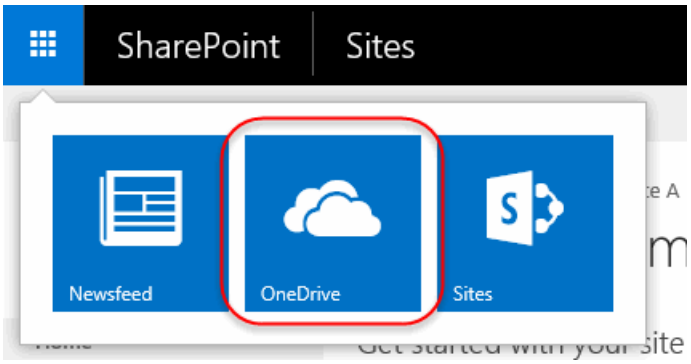


The following walk-through will show you how to edit your personal site and add documents and a blog post.

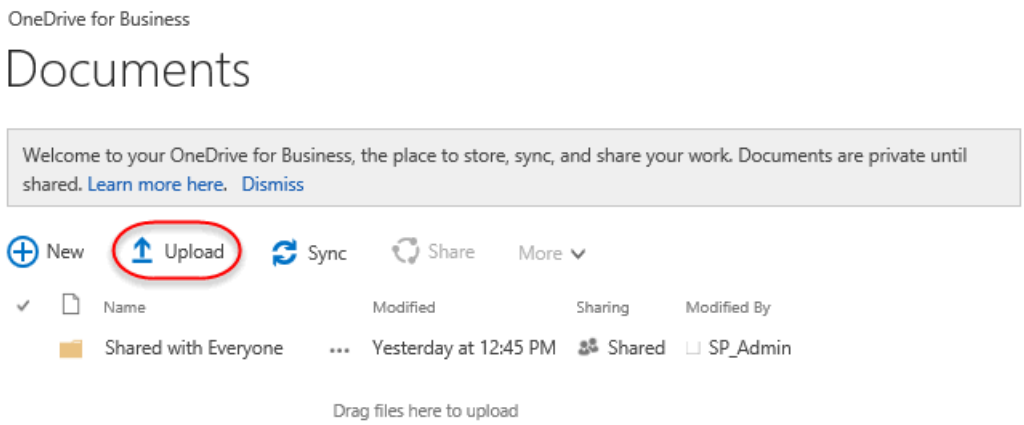
Note

These same steps are performed as part of the exercise with this lesson so unless you have a separate account you want to perform the walk-through steps on, you should wait to perform them in the exercise.

1. Add a new file to your personal **Documents** library.
   A. Click the **OneDrive** link located under the **checkered icon** in the upper-left corner of any SharePoint page you are currently on.



   B. Click the **Upload** link at the top of the **Documents** library.

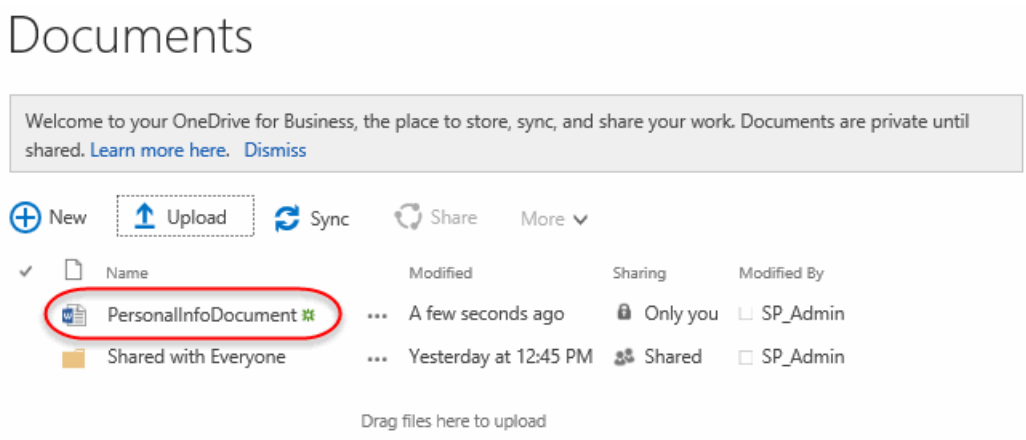


Note

Note that there is a **New** link but it does the same thing as the **Upload** link unless you have Office Online Server installed and integrated with SharePoint. If you do have Office Online Server integrated than the **New** link would allow you to choose what type of new Office document you want to create.

C. Browse and select the `C:\ClassFiles\PersonalInfoDocument.docx` Word file and click the **Open** button.

D. Verify the **PersonalInfoDocument** is now displayed in the **Documents** library of your personal site.

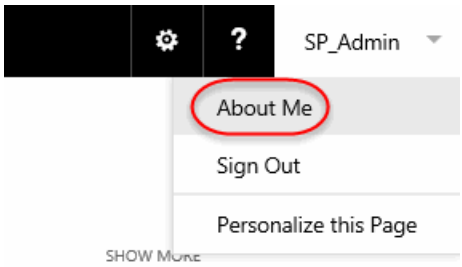


Note

Note the **Shared with Everyone** folder in the **Documents** library. Files uploaded to this folder will be shared with Everyone in your organization. The file you uploaded in the previous steps is only available to you.

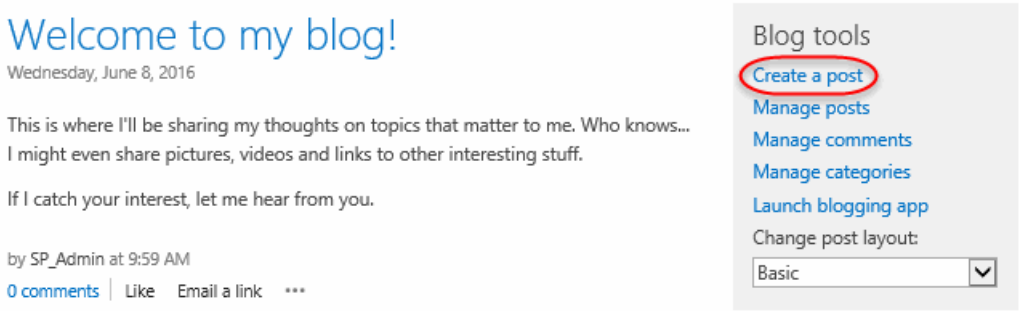
2. Create a personal blog post.

   A. Click the **SP_Admin** drop-down and then choose the **About Me** link to navigate back the users profile home page.



   B. Click the **Blog** link in the **Quick Launch** of your personal site.

   C. Click the **Create a post** link under the **Blog Tools** group located on the right side of your blog's home page.



   D. Use the following information to fill in the new blog post.

      - **Title**: "Learning SharePoint"
      - **Body**: "SharePoint is full of features including personal sites."
      - **Category**: Select **Opinions** and click the **Add>** button.

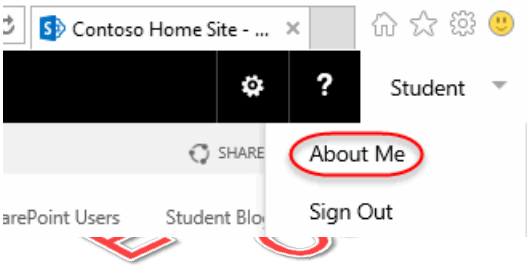
   E. Click the **Publish** button to save the new blog post.

Exercise 21: Managing and Viewing Personal Information and Content

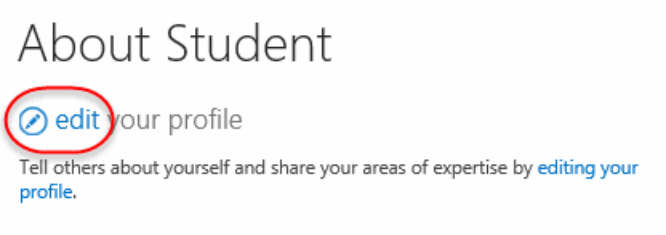
15 to 25 minutes

In this exercise, you will configure your SharePoint profile. You will also test the view of your profile and view another user's profile.

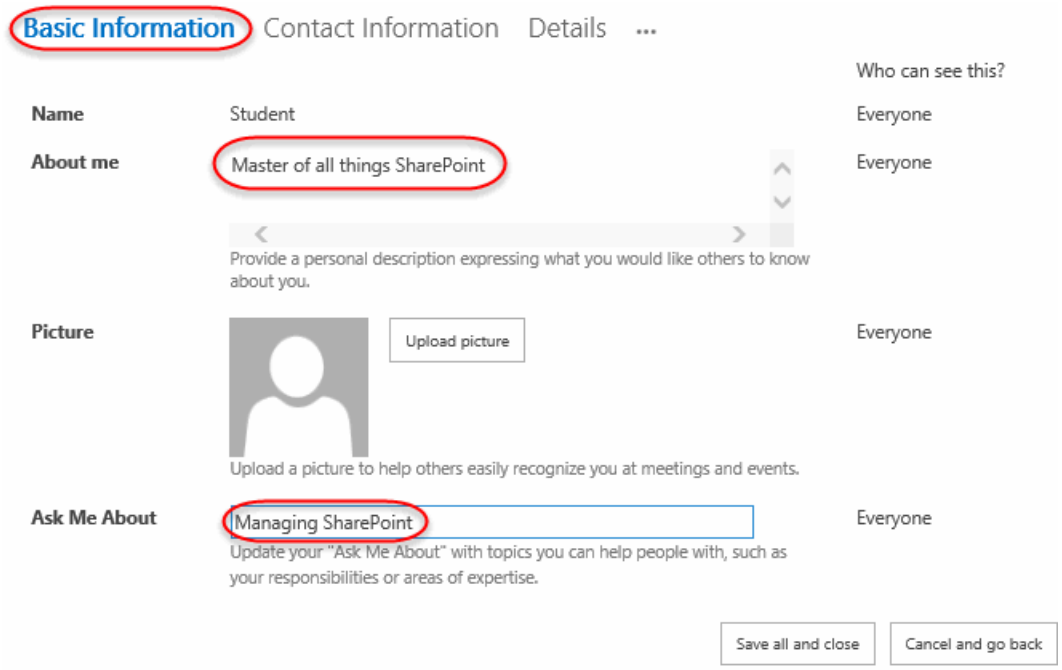
1. Edit your profile.
   A. Click the **Open Menu** and select the **About Me** option.



   B. If you are prompted for credentials enter your account name and password.
   C. Click the **edit** link located at the top of your profile home page.



   D. Use the following list of information to fill in the fields for the **Basic Information** in your profile.
      - **About me:** "Master of all things SharePoint."
      - **Ask Me About:** "Managing SharePoint."



E. Click the **Upload Picture** button in the **Picture:** field for the profile.

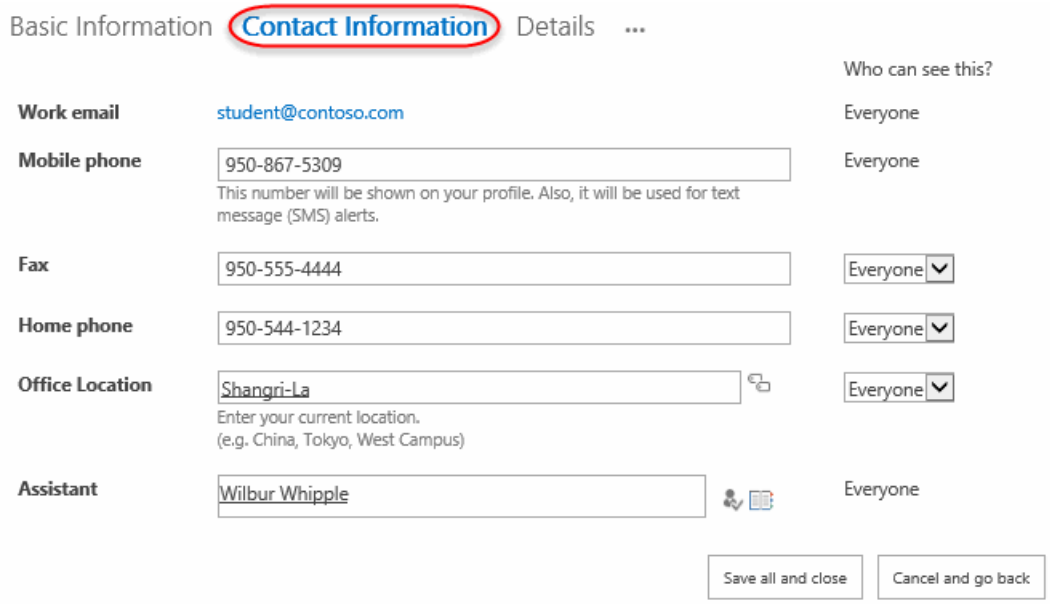
F. Click the **Browse…** button on the **Choose a Picture** dialog.

G. Navigate to the folder you downloaded the class files to and select the `pair-of-students.jpg` file. Click the **Open** button of the **Choose File to Upload** dialog window.

H. Click the **Upload** button of the **Choose a picture** dialog to save your selection.

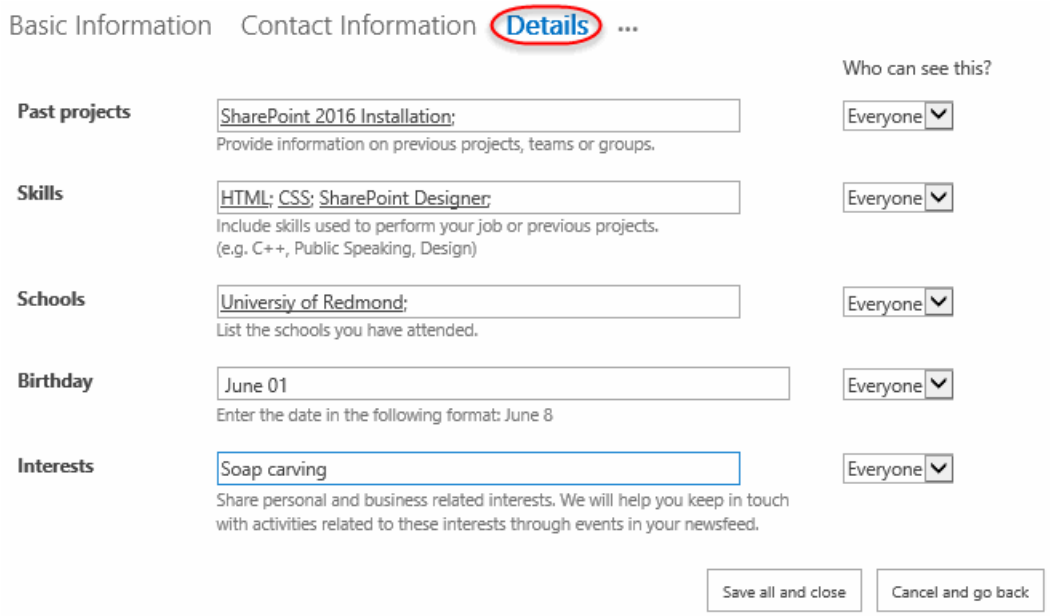
I. Click the **Contact Information** link and use the following list of information to fill in the fields.

- **Mobile phone:** “950-867-5309”.
- **Fax:** “950-555-4444”.
- **Home Phone:** “950-544-1234”.
- **Office Location:** “Shangri-La”.
- **Assistant:** “Wilbur”



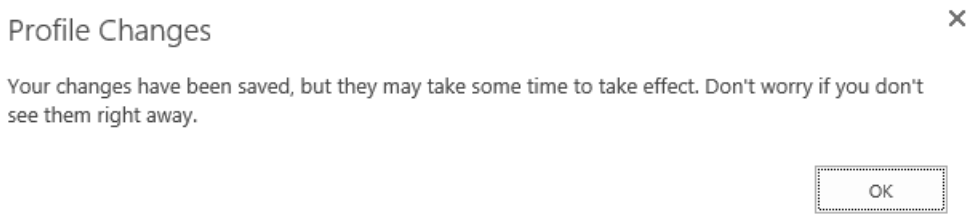
J. Click the **Details** link and use the following list of information to fill in the fields.

- **Past projects:** "SharePoint 2010 installation".
- **Skills:** "HTML, CSS, SharePoint Designer".
- **Schools:** "University of Redmond".
- **Birthday:** "June 01".
- **Interests:** "Soap carving."

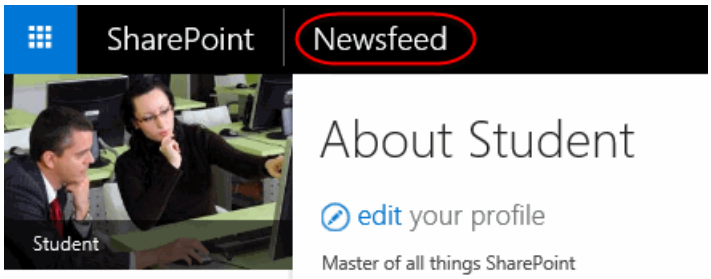


K. Click the **Save and Close** link at the bottom of the form.

L. Click the **OK** button on the **Profile Changes** dialog.



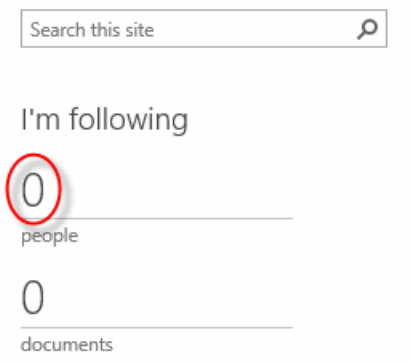
2. Click the **Newsfeed** link in the top-left corner of the page.



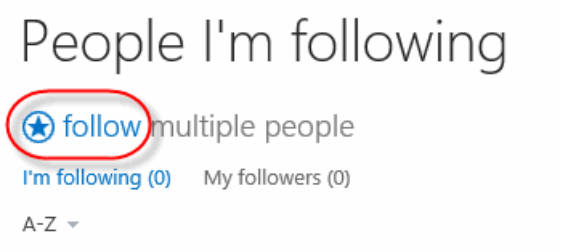
3. Note the options, **people, documents, sites** and **tags** listed under the heading **I'm following**.

4. Add a **follow** for Wilbur Whipple.

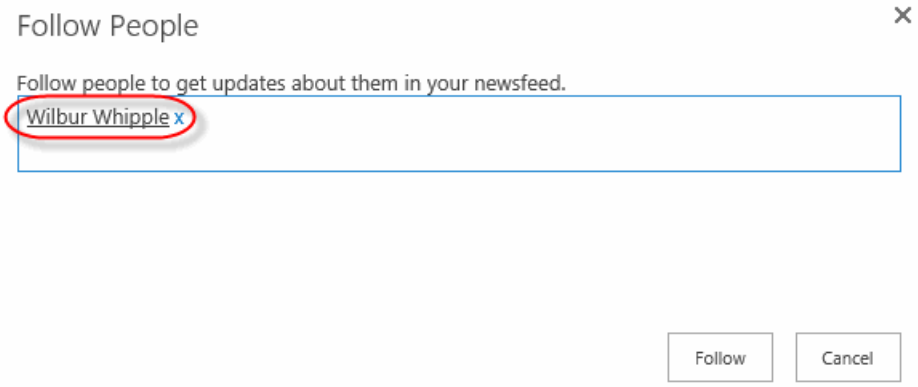
   A. Click the **0** link above the **people** heading under the **I'm following** list.



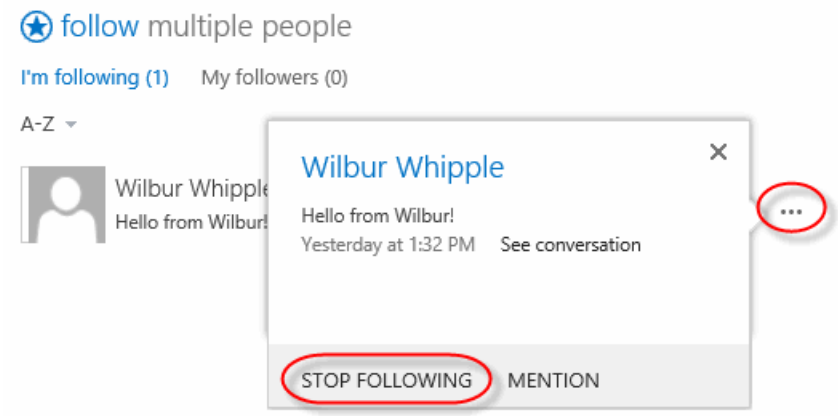
B. Click the **follow** link on the **People I'm following** page.



C. Type "Wilbur Whipple" in the **Follow people to get updates about them in your newsfeed** field of the **Follow People** dialog and click the **Follow** button.

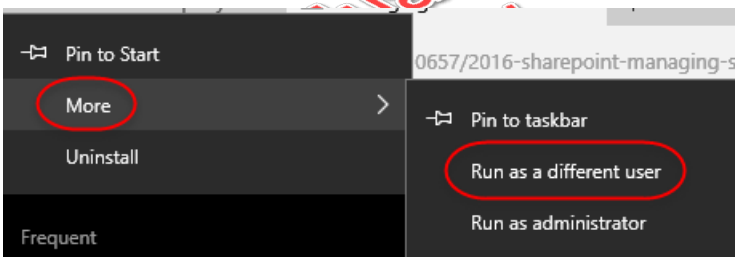


D. **Wilbur Whipple** now displays as a person you are following. Note that you can remove a following by clicking the ellipsis link nest to their name, **do not** remove Wilbur at this time.



5. Add a newsfeed entry logged in as Wilbur Whipple.

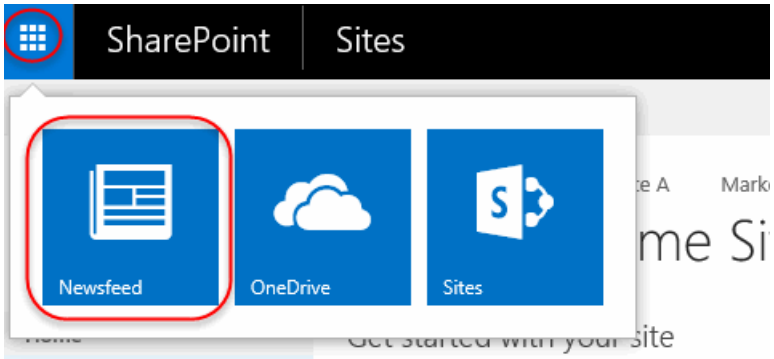
   A. Right-click your browser icon and choose the **More** option and then choose **Run as different user** from the list of options.



   B. In the **Widows Security** dialog window, enter “Wilbur” for the account name and “Pa$$w0rd” for the password. Click the **OK** button to complete the logon.

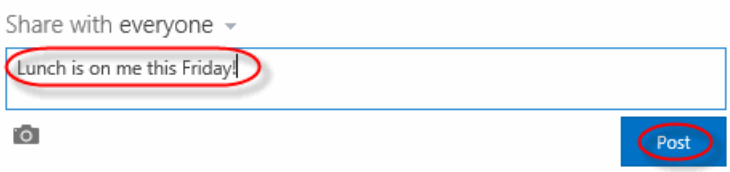
   C. Try to navigate to root of your team site.

   D. Click the **checkered icon** and then the **Newsfeed** link in the upper-right corner of the browser for **Wilbur Whipple**.



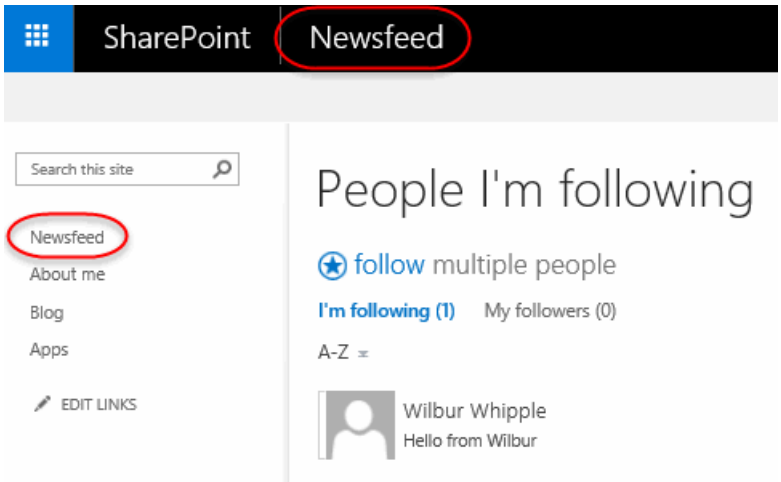
E. If prompted for credentials enter “Wilbur” for the account name and “Pa$$w0rd”.

F. Type “Lunch is on me this Friday!” in the **Share with everyone** field and click the **Post** button.

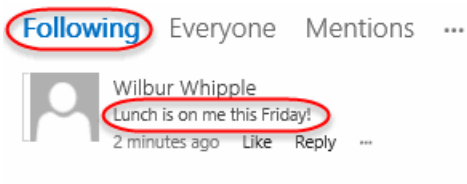


6. View the newsfeed from Wilbur with your student account.

A. Switch back to the browser window logged in as **Student** and click the **Newsfeed** link in either the **Quick Launch** or at the top of the page.

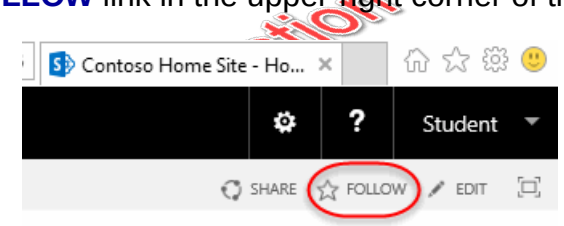


B. Note the new entry under the **Following** heading posted by **Wilbur Whipple**.

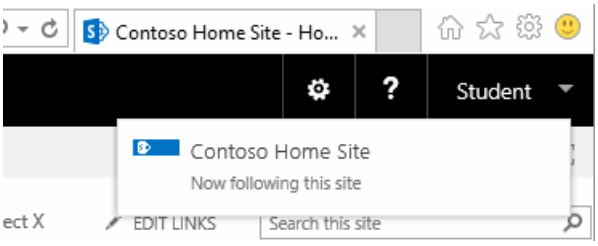


7. You can close the browser window running under Wilbur's credentials.
8. In the browser window logged in as **Student** navigate back to the home page of your team site.

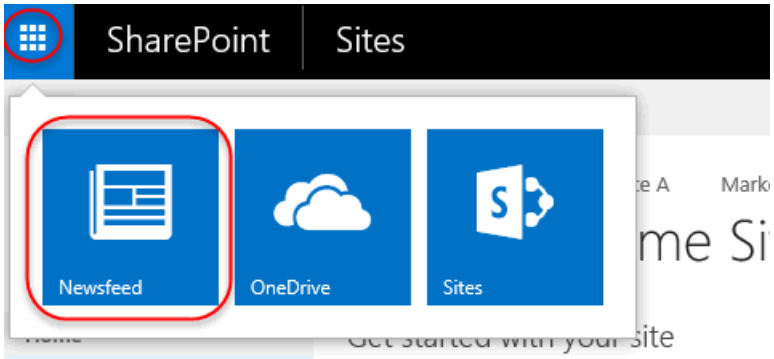
9. Follow the **Contoso Home Site**.
   A. Click the **FOLLOW** link in the upper-right corner of the browser window.



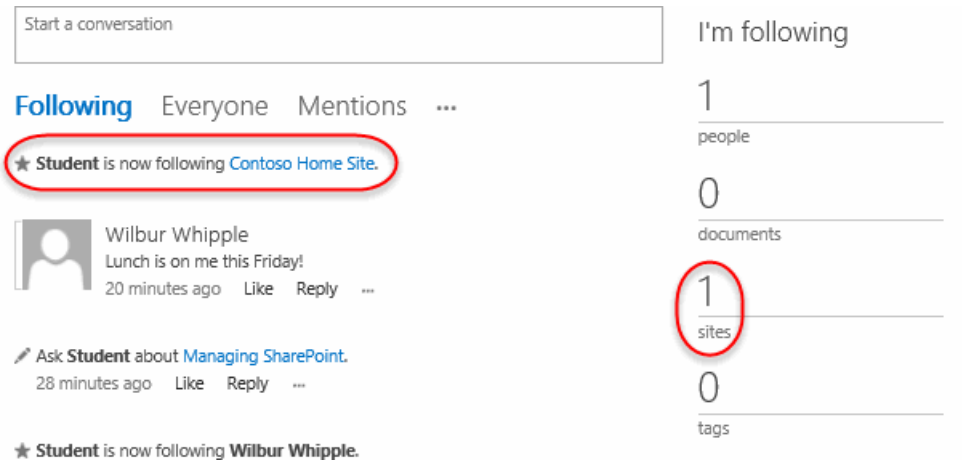
   B. Note the confirmation pop-up notifying you are now following the site.



10. Verify the site is now listed under your personal newsfeeds.
    A. Click the **checkered icon** and then the **Newsfeed** link in the upper-right corner of the browser window.

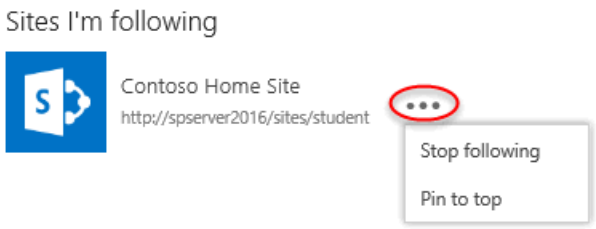


B. Note the new entry under the **Following** list and the number has increased for **sites**.



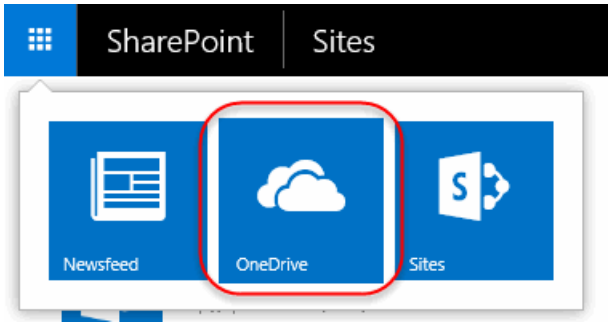
C. Click the number **1** link above the **sites** label to view followed sites.

D. Note the list of **Sites I'm following** and the link that allows you to **Stop following**.

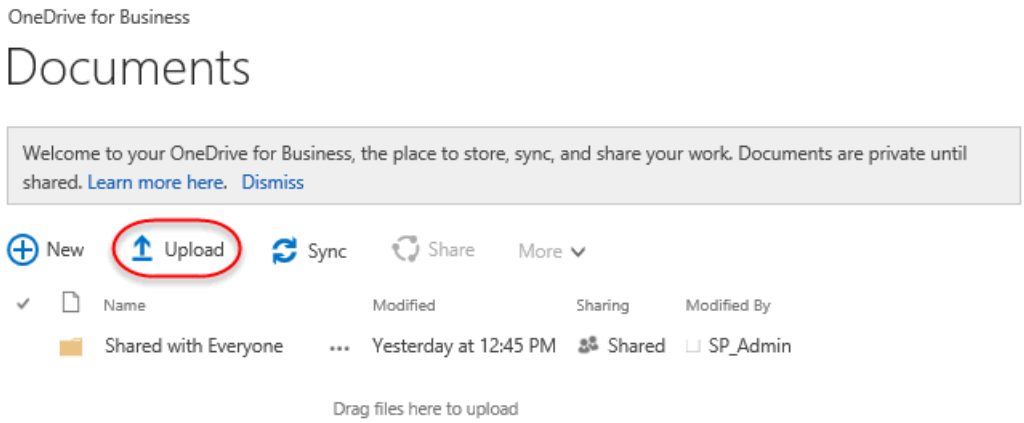


11. Add a new files to your personal **Documents** library.

    A. Click the **checkered icon** and then choose **OneDrive** from the options at the top-left corner of any SharePoint page you are currently on.



B. Click the **Upload** link at the top of the **Documents** library.

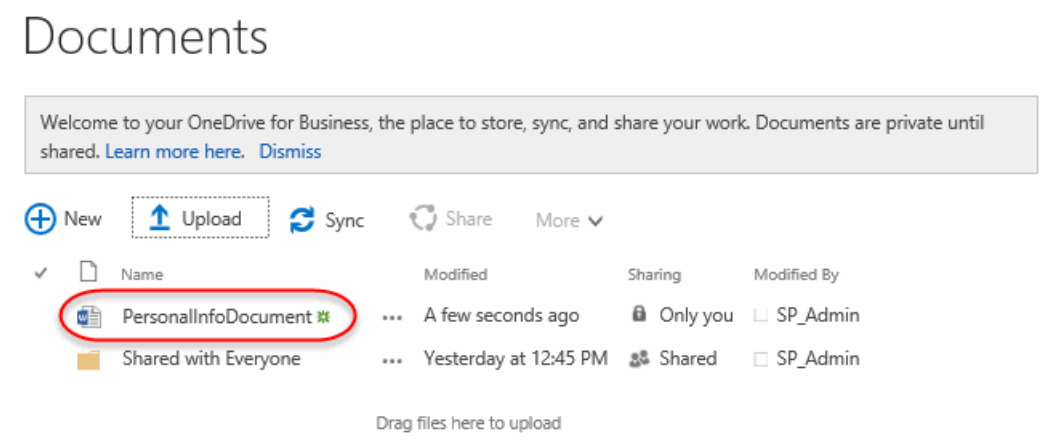


Note

Note that there is a **New** link but it does the same thing as the **Upload** link unless you have Office Online Server installed and integrated with SharePoint. If you do have Office Online Server integrated than the **New** link would allow you to choose what type of new Office document you want to create.

C. Browse and select the `C:\ClassFiles\PersonalInfoDocument.docx` Word file and click the **Open** button.

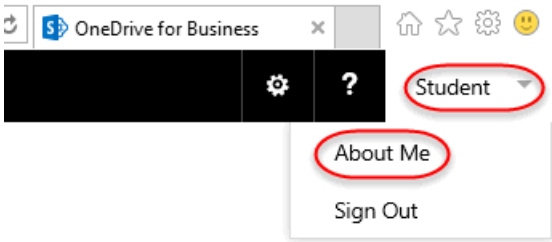
D. Verify the **PersonalInfoDocument** is now displayed in the **Documents** library of your personal site.



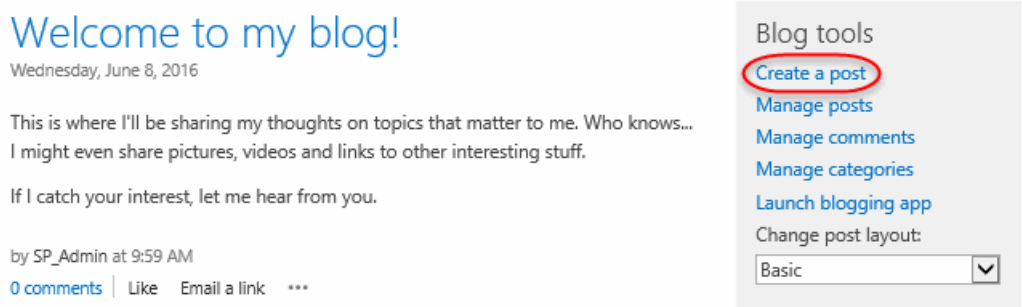
Note

Note the **Shared with Everyone** folder in the **Documents** library. Files uploaded to this folder will be shared with Everyone in your organization. The file you uploaded in the previous steps is only available to you.

12. Create a personal blog post.
    A. Click the **Student** link and then choose **About Me** from the menu to navigate back the users profile home page.



    B. Click the **Blog** link in the **Quick Launch** of your personal site.
    C. Click the **Create a post** link under the **Blog Tools** group located on the right side of your blog's home page.



D. Use the following information to fill in the new blog post.

- **Title**: "Learning SharePoint"
- **Body**: "SharePoint is full of features including personal sites."
- **Category**: Select **Opinions** and click the **Add>** button.

E. Click the **Publish** button to save the new blog post.

Conclusion

In this lesson, you have learned:

- How to edit a personal profile.
- How manage newsfeeds.
- How to add people newsfeeds.
- How to add documents newsfeeds.
- How to add sites newsfeeds.
- How to follow tags.
- How to store personal content.