Introduction to SharePoint 2019

with examples and
hands-on exercises

WEBUCATOR

Version: 1.1.2

The Author

Tracy Berry

Tracy has been a senior graphic designer/programmer, instructor, and consultant since 1993 and has developed hundreds of logos, marketing materials, websites, and multimedia solutions for customers worldwide, including involvement in large corporate software rollouts. She has helped many organizations optimize and streamline data solutions. She teaches both onsite and online courses and has her CTT (Certified Technical Trainer) certification. Tracy specializes in teaching graphics, desktop publishing, web design, reporting/productivity applications, as well as the creation of online courses with software from leading vendors.

Class Files

Download the class files used in this manual at https://static.webucator.com/media/public/materials/classfiles/SHP2019.5-1.1.2.zip.

Errata

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

Table of Contents

LESSON 1
SharePoint Introduction

Topics Covered

☑ Versions of SharePoint.

☑ SharePoint site hierarchy.

☑ Team Site layout.

☑ Navigation within a Team Site.

Introduction

SharePoint 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 blogs, 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 is available in several on-premise versions in addition to packages hosted by Microsoft (online). This course will focus on the on-premise versions of SharePoint but the concepts are applicable to SharePoint Online. The differences between the two are based on the features they offer. Some features are only available in what is called the "classic" experience vs the "modern". The on-premise and online are both being updated often and will have many new features available as time goes by.

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 version.

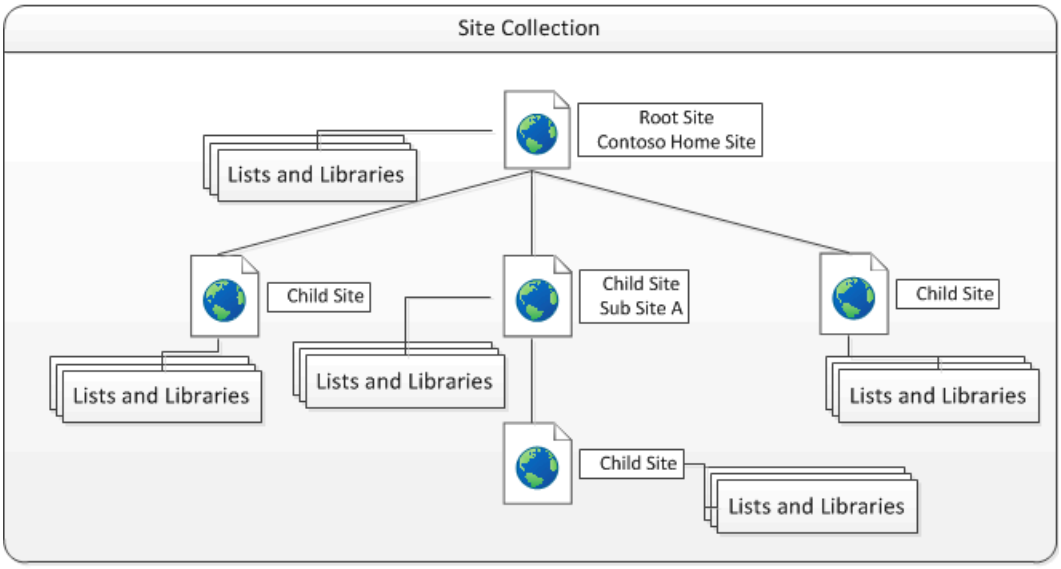
The scope of this course is for the “end user” and most of the features that fall within that scope come with the Standard version of SharePoint.

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.

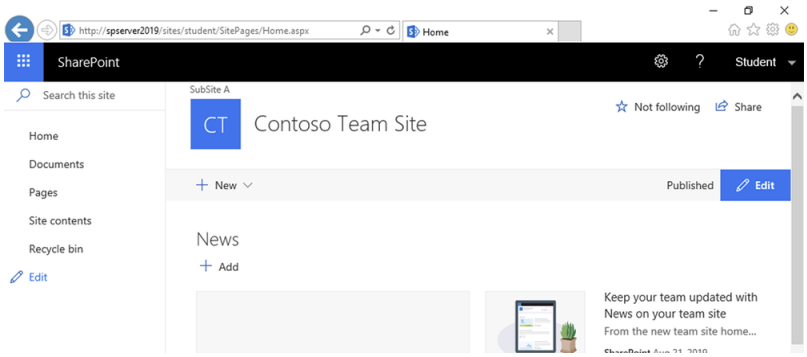
The following diagram illustrates a conceptual view of how sites might be organized in a Site Collection. Note that the presentations in this course use a root site named **Contoso Home Site** with a single child site named **Sub Site A.**



❖ 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://spserver/sites/student`.
   C. The home page of your team site should look similar to the following:

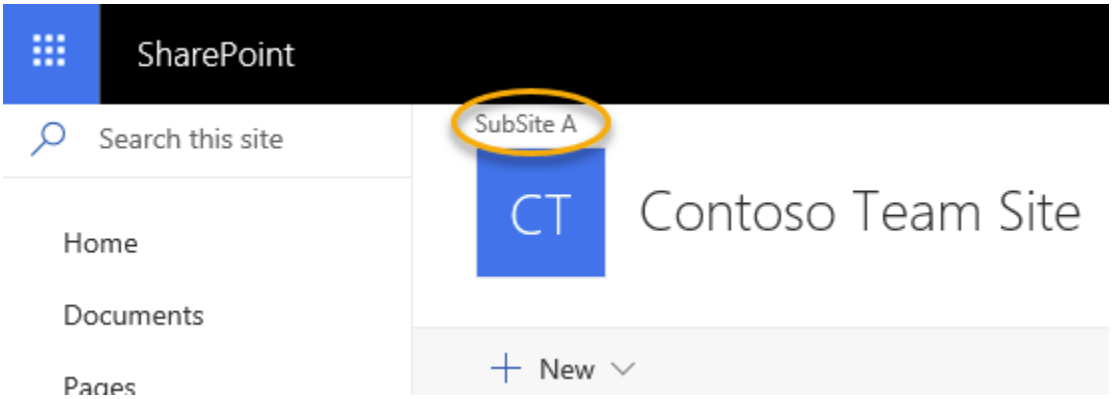


2. Navigate using the Top Link Bar.

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

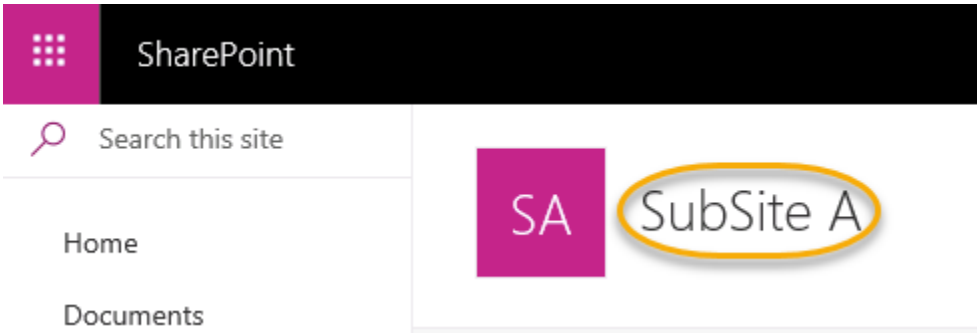
   The title of the walk-through site is **Contoso Team Site** and the **Home** is the main way to navigate back to the home page.

   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.

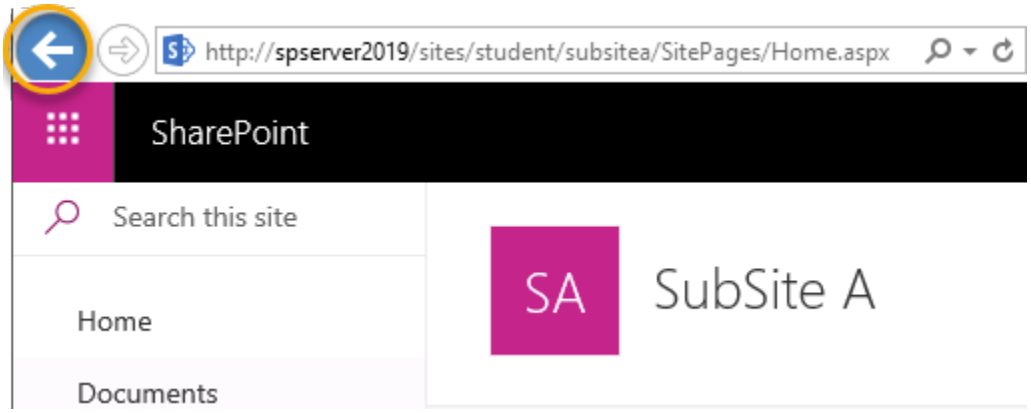
   C. Note how the **Title** of the child site is shown in the following image.



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 the colors used. 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.

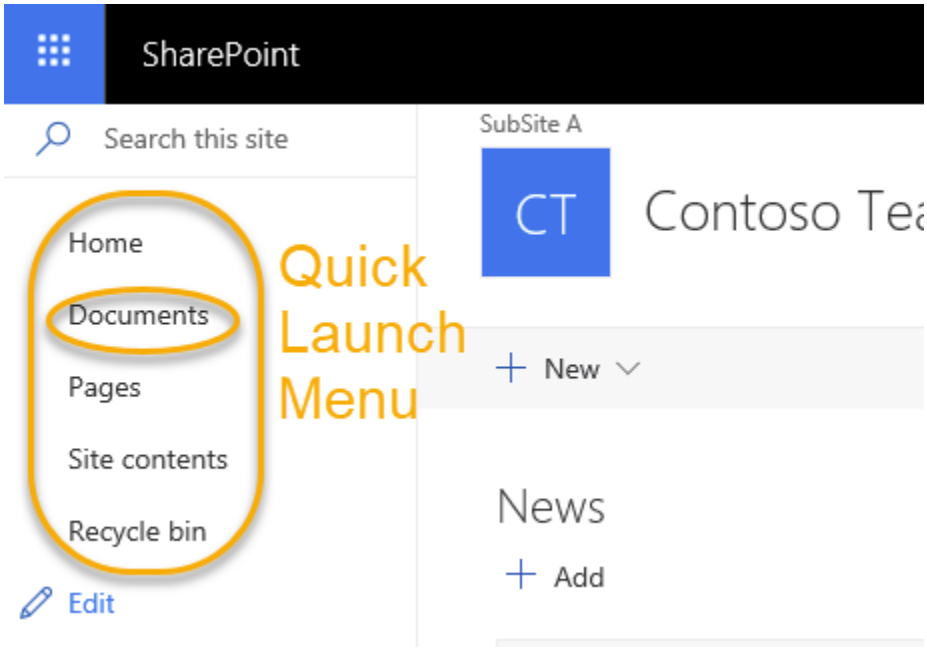
3. Navigate back to the parent site.
   A. Use the **Back** button of your browser to navigate back to the parent site.



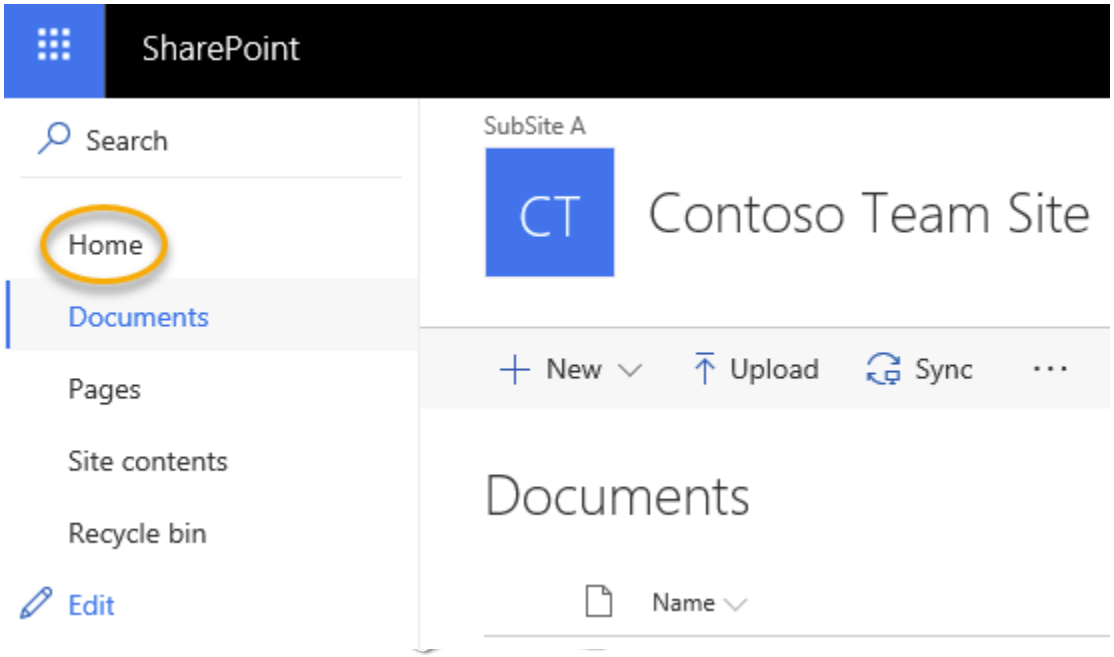
Looking Forward
In a later part of this course, you will learn how to configure child sites to use the same **Top Link Bar** as their parent site as well as how to add custom links.

4. Navigate using the Quick Launch menu.

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



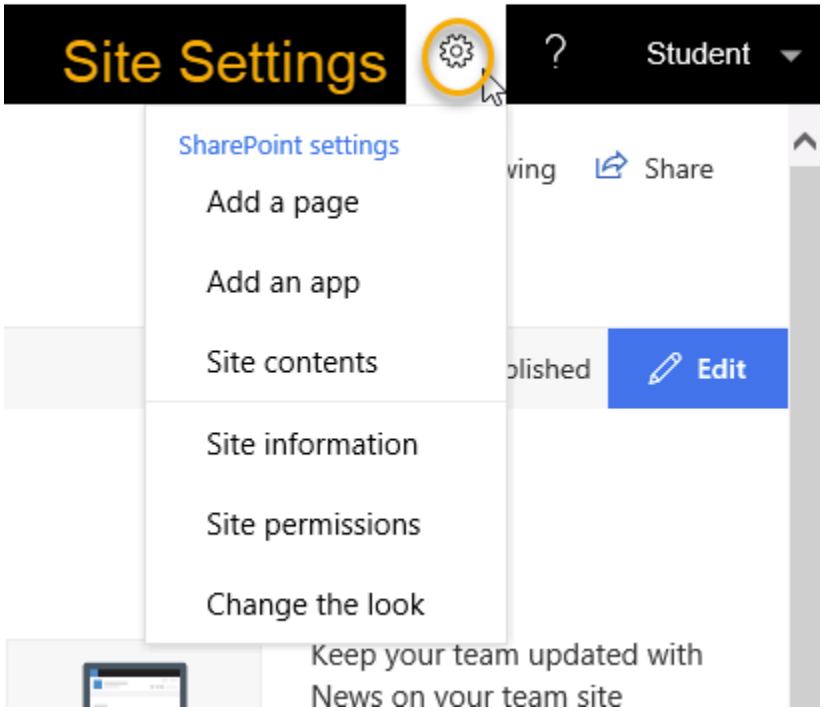
   B. Navigate back to the home page of the site by clicking the **Home** link within the **Quick Launch** menu.



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.

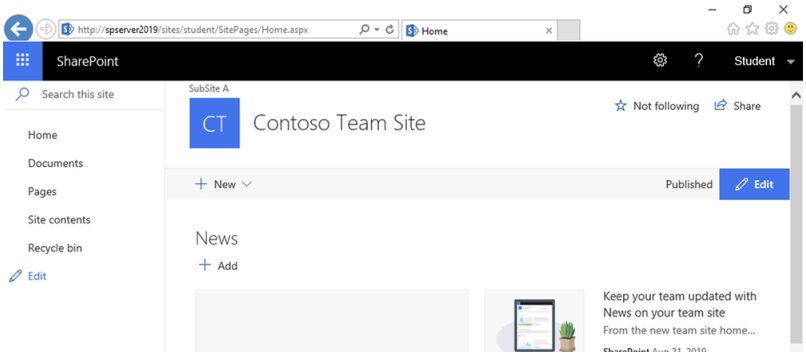
Looking Forward
In a later part of this course, you will learn how to assign permissions.

Exercise 1: Team Site Navigation

15 to 25 minutes

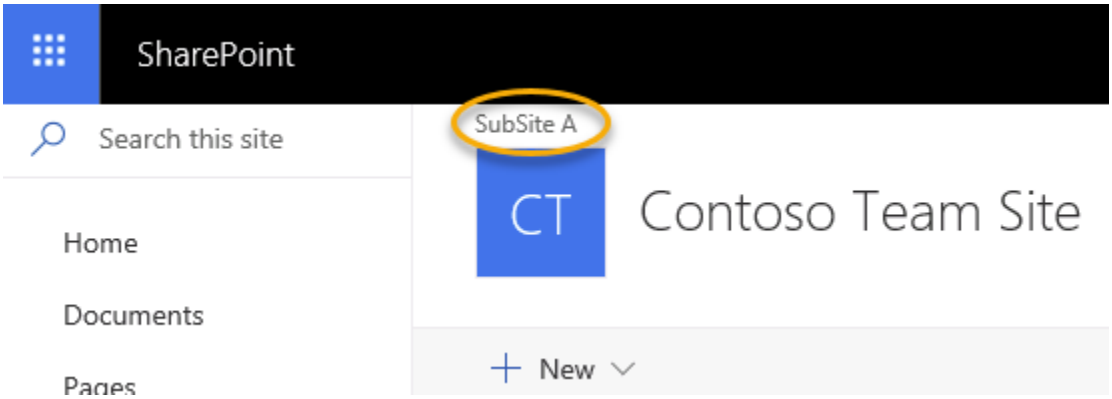
In this exercise, you will learn to navigate a basic SharePoint Team Site.

1. Navigate to your team site.
   A. Launch Internet Explorer.
   B. In the address field, enter the address: **http://spserver2019/sites/student**.
   C. The home page for your team site will load and look similar to the following:

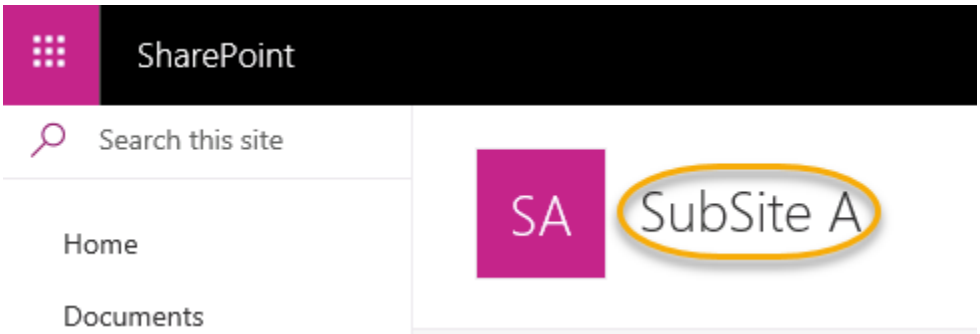


2. Navigate using the Top Link Bar.
   A. Verify that you are currently located on the home page of your Team Site, the **Contoso Team Site**.

   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.

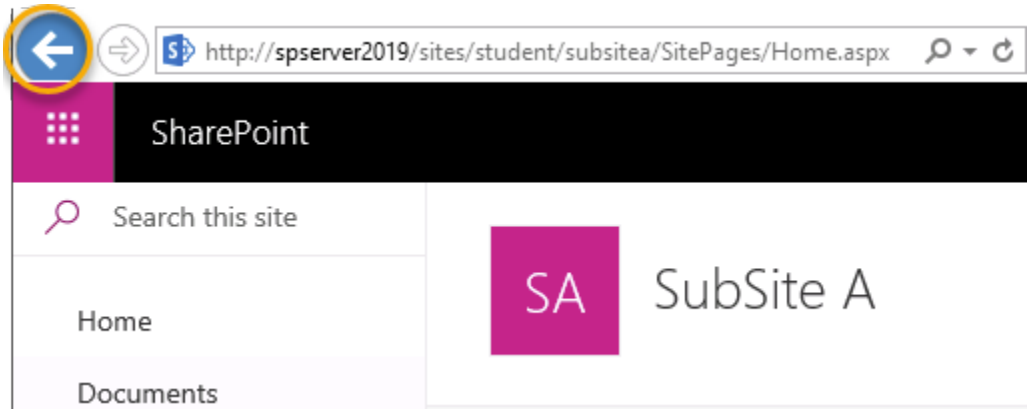


Note

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 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.

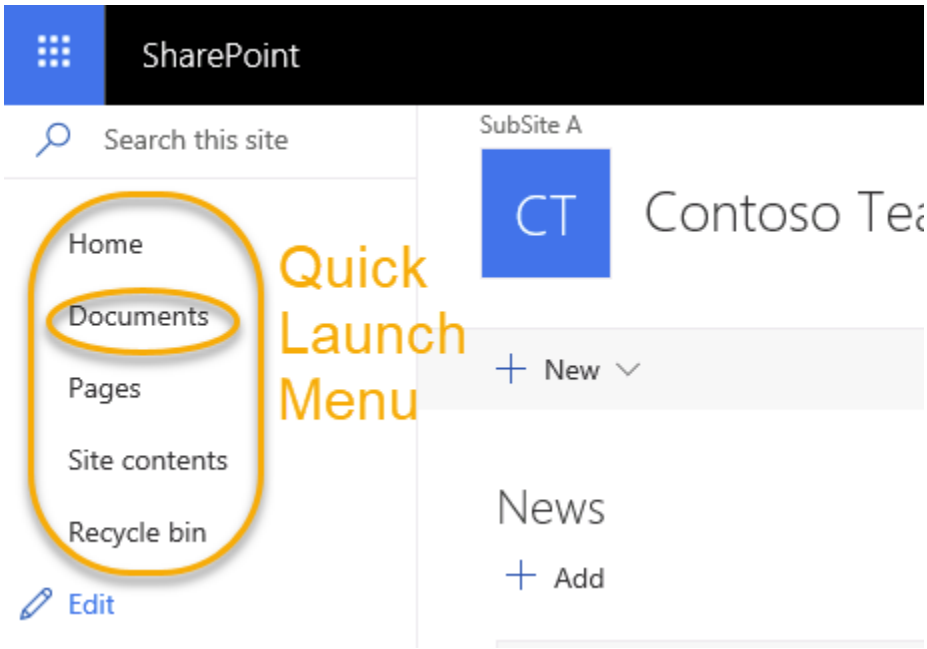
   A. Use the **Back** button of your browser to navigate back to the parent site.



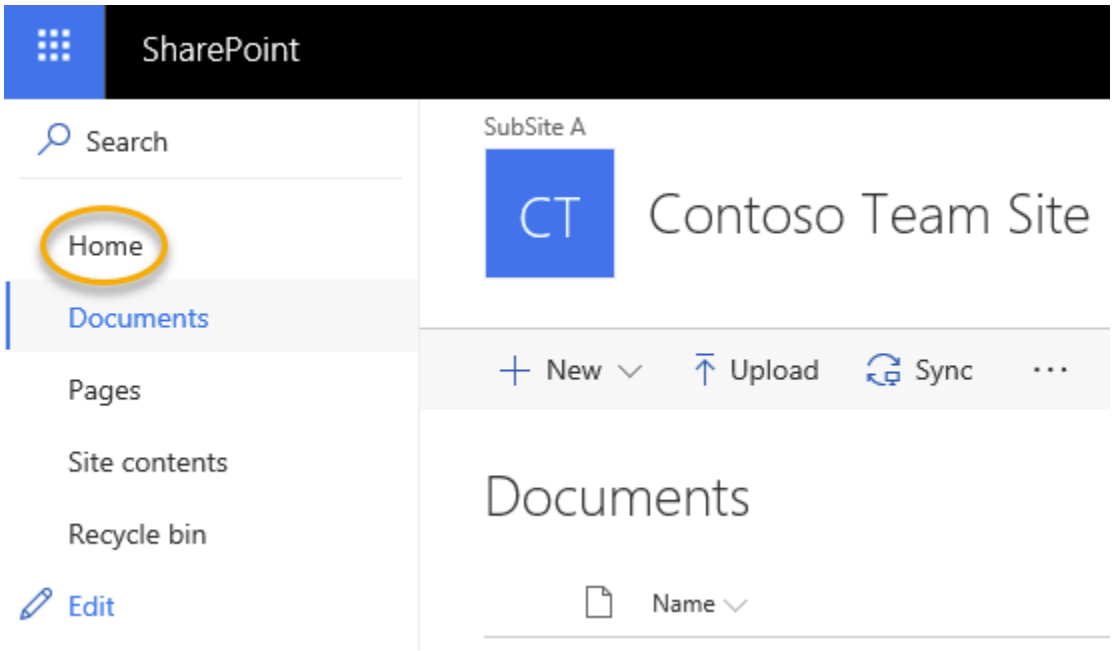
Looking Forward

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.

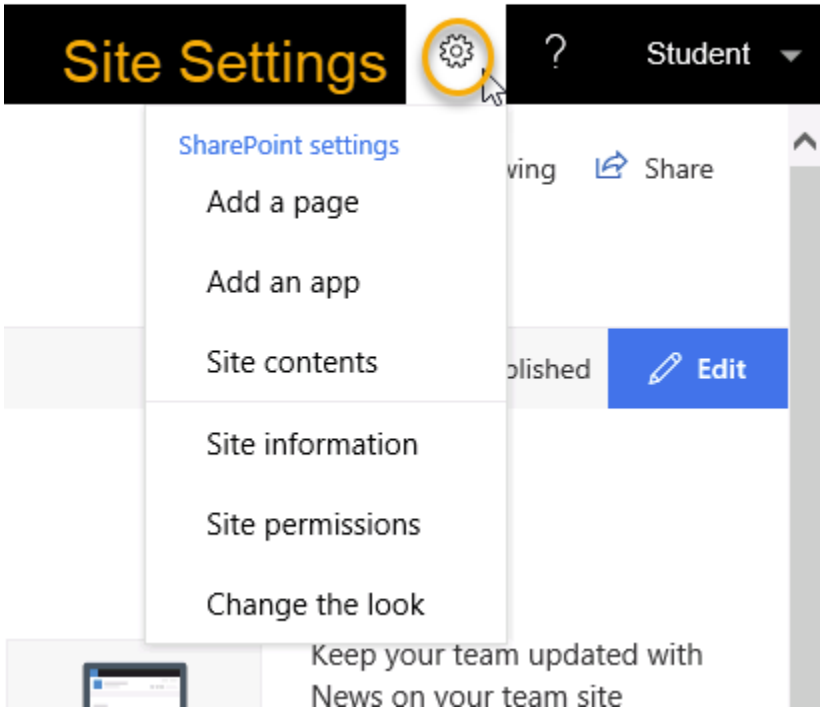


Looking Forward

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
Library Basics

Topics Covered

☑ Creating new libraries using library templates.

☑ 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.

2.1. 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 2019 Team Site.

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

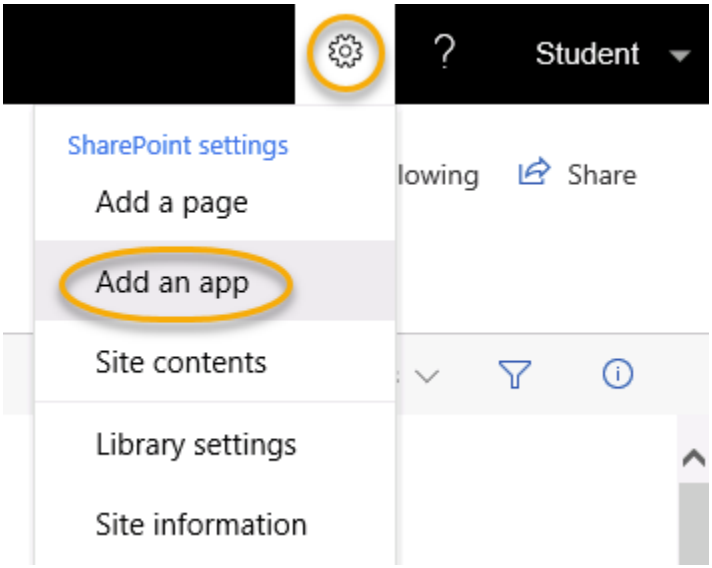
All SharePoint libraries have a **New** and an **Upload** link listed at the top of the library for adding new content.

2.2. Creating Libraries

❖ 2.2.1. Creating a Document Library and Adding Columns

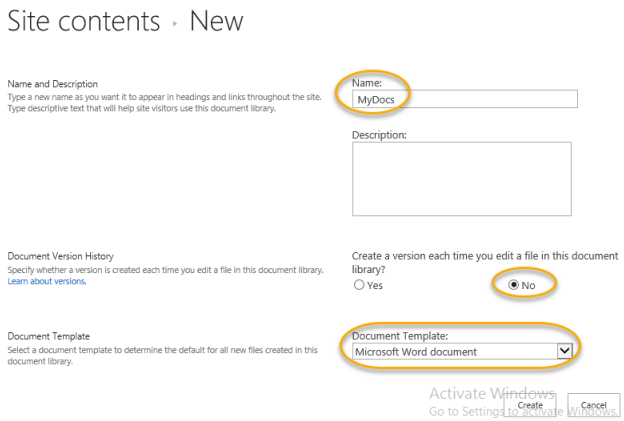
The following walk-through will show you how to create a new **Document Library** for Microsoft Word documents. Additionally, the walk-through will show you how to customize the library by adding columns.

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 “MyDocs” 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.



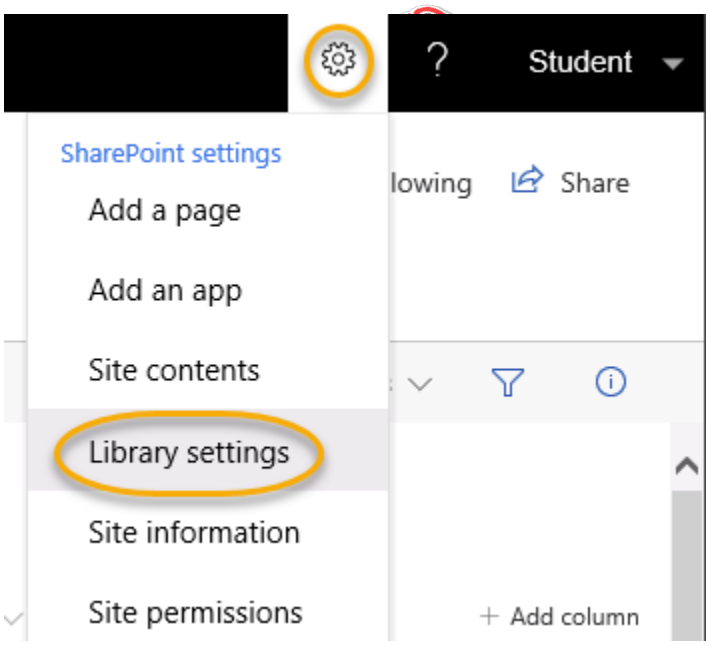
Naming Conventions

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. Navigate to the MyDocs library. Click the **Create Column** button in the **Library** tab toolbar if you are using classic view. If you are using the modern view, click **Settings**, then **Library Settings**, then click **Create Column** under **Columns**.

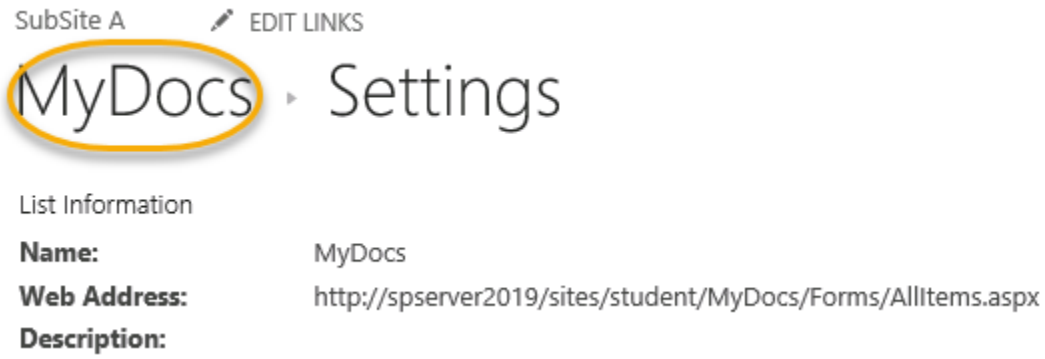


   B. Enter “Department” in the **Column name** field and leave the default for **The type of information in this column is** option field set to **Single line of text**.

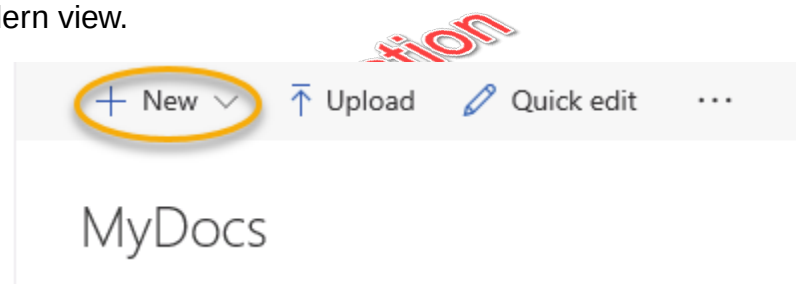
   C. Leave the rest of the column options at their default settings and click the **OK** button to complete creating the new library column.

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

   A. Click the **Files** tab to open the toolbar if you are using the classic view, or click **My Docs** in the breadcrumb navigation in the default modern view.



   B. Click the **New Document** button on the **Files** tab toolbar if you are using the classic view, click **New** drop-down menu if you are using the default modern view.



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

Classic View
Using classic view, 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.

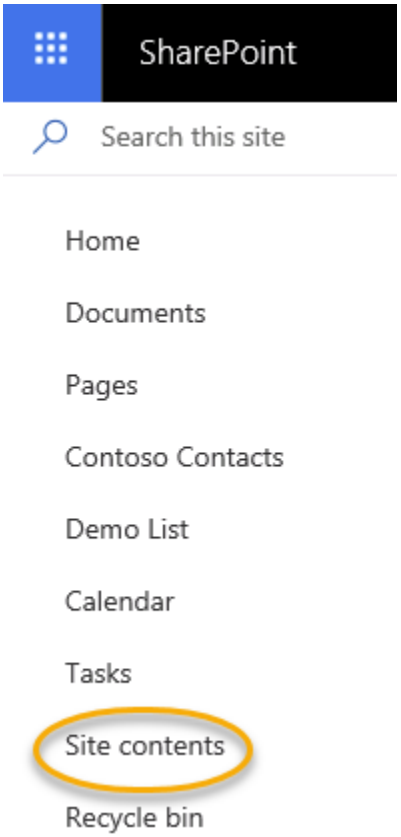
Modern View
Using modern view, you may not have an option to create an office file.

2.3. Managing Documents and Versioning

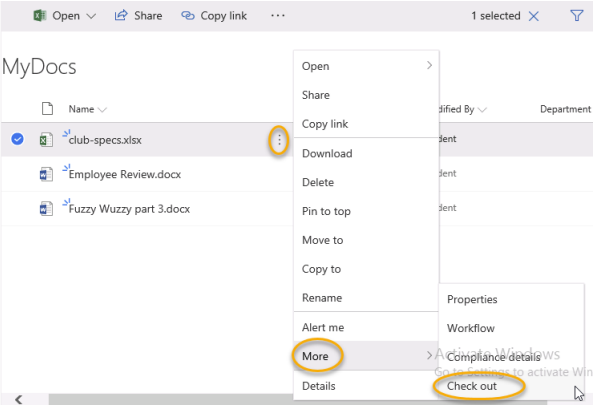
❖ 2.3.1. Checking Out Documents

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.

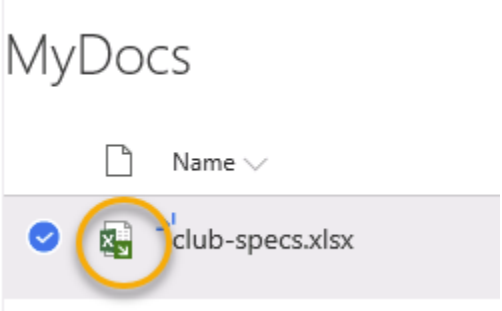
1. **Check Out** a document from the **My Docs** library.
   A. Click the **My Docs** link in the **Contoso Home Site** **Quick Launch** menu. You may need to click **Site Contents** first.



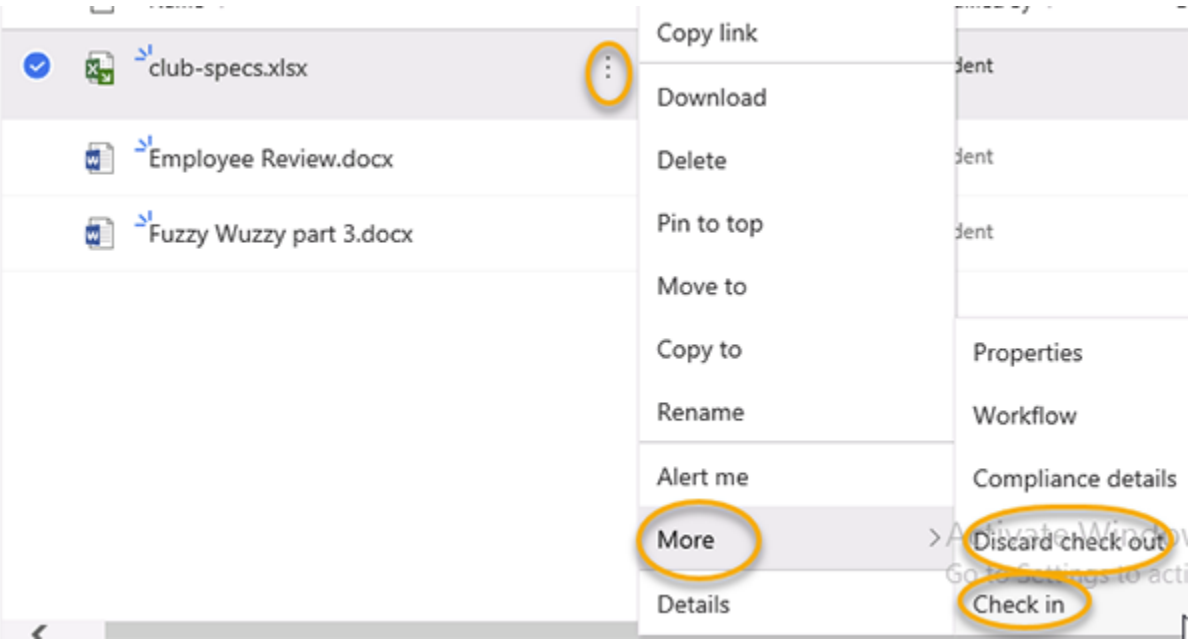
B. Click the ellipsis button next to the title of the item then click **More**, next click the **Check Out** link in the menu to check out the document.



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**.

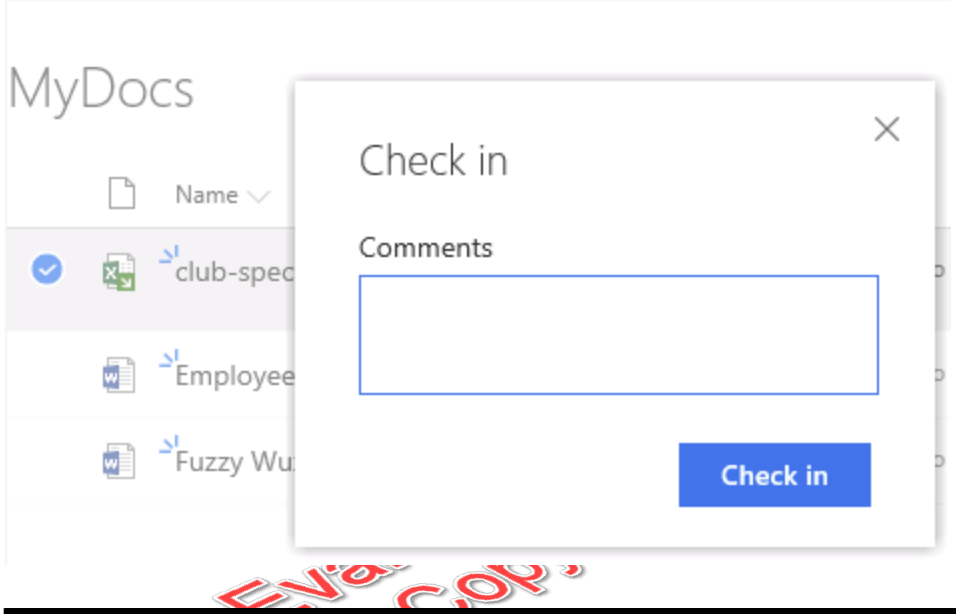


Be Careful

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 add a note.



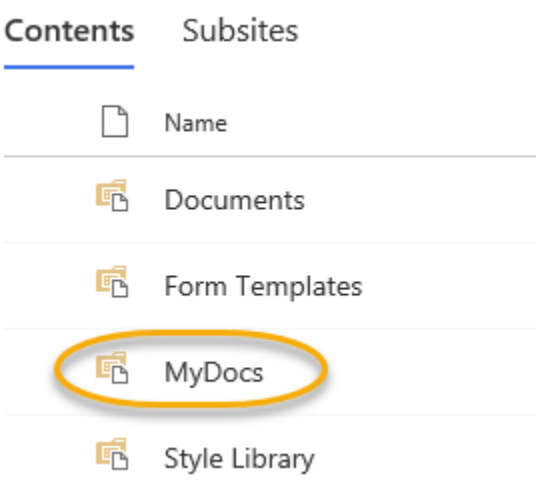
Alternative Method
You can also use the **Files** tab toolbar in a library to check in an item if you are using classic view.

❖ 2.3.2. Deleting and Restoring Documents

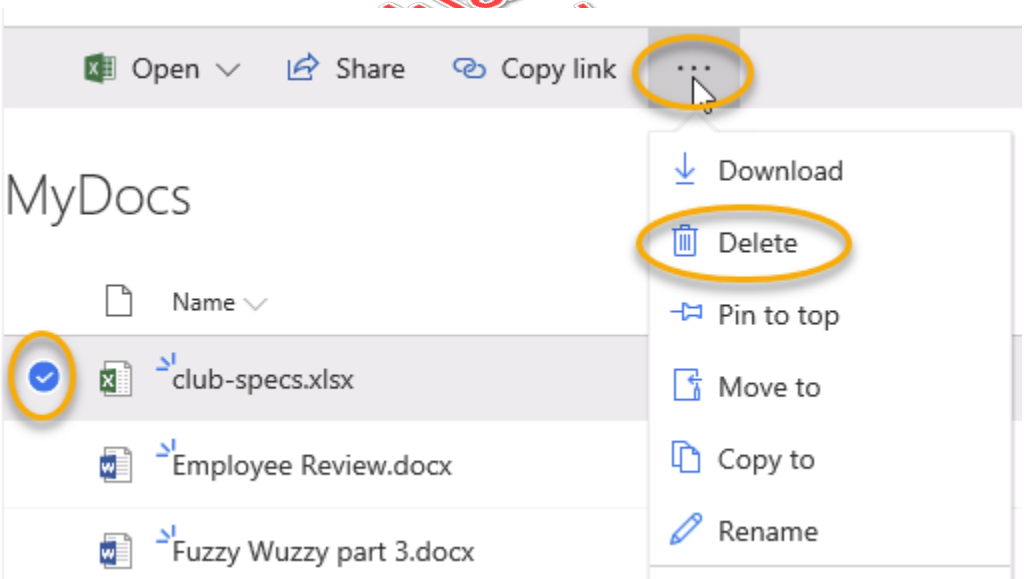
The following walk-through will show you how to delete a document from the **My Docs** library and restore it from the **Recycle Bin**.

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

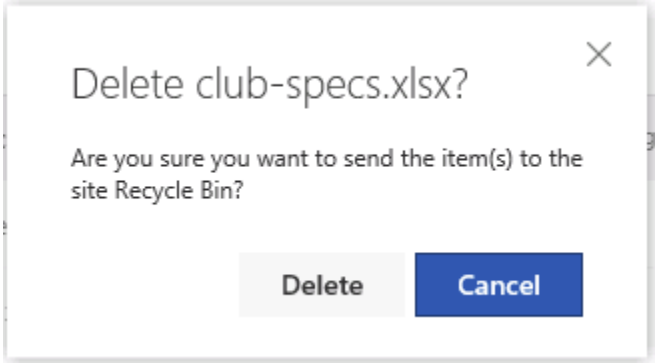
   A. Click the **My Docs** link in the **Site Contents**.



B. Select the file to delete by clicking the **Check** box column and then click the **Delete** button in the toolbar.



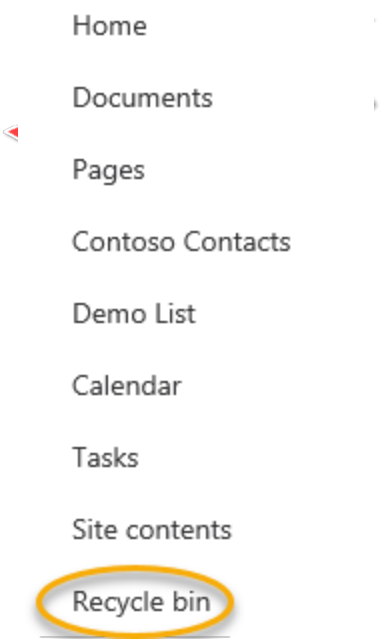
C. Click the **Delete** button on the **Message from web page** dialog window asking you to verify sending the item to the Recycle Bin.



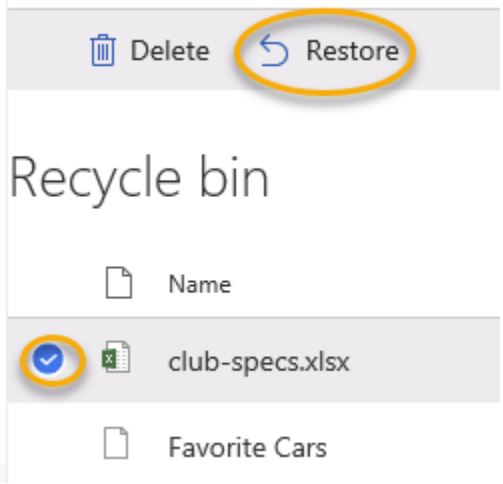
D. Verify that the file has been removed from the **My Docs** library.

2. Recover the deleted file 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 file tem to select it and click the **Restore** at the top of the list to restore the document.



C. Click the **OK** button on the dialog box to confirm you want to restore the file.

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

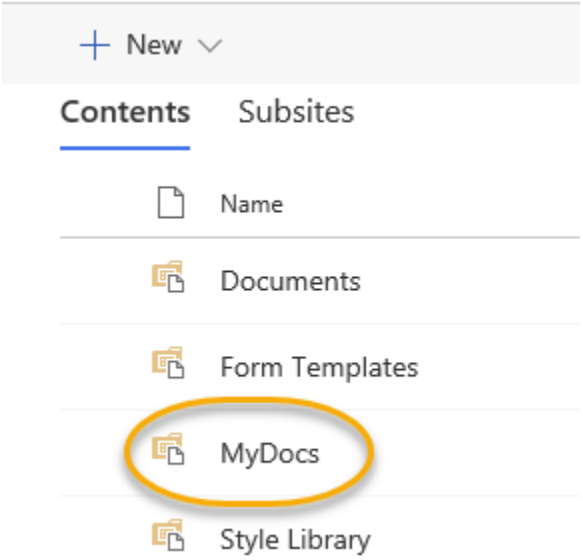
❖ 2.3.3. Versioning

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.

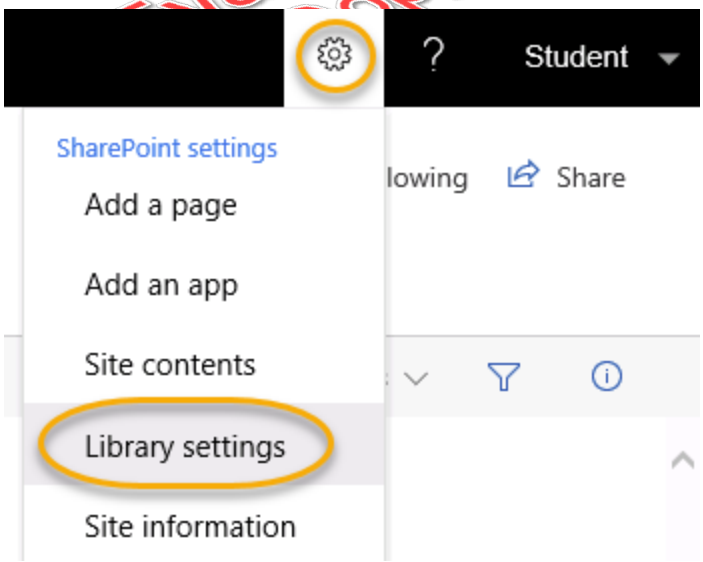
The following walk-through will show you how to turn versioning on and require documents to be checked out in the **My Docs** document library and test the results.

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

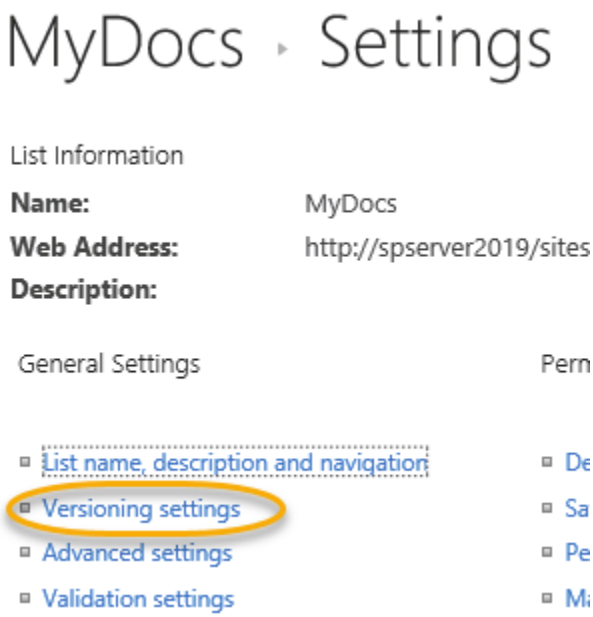
   A. Click the **My Docs** link in the **Site Contents**.



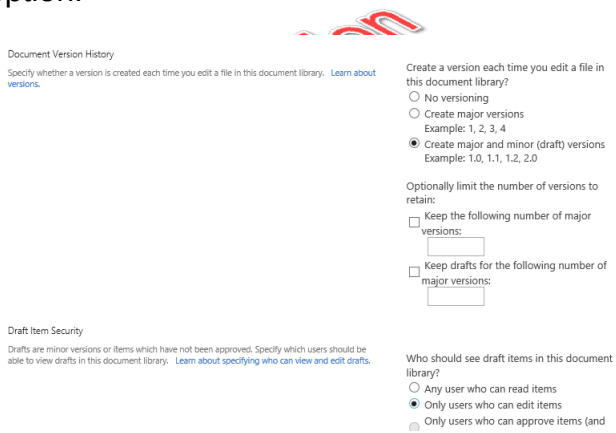
B. Click the **Library** tab to open the toolbar and then click the **Library Settings** link button if you are using the classic view. If you are using the default modern view click **Settings** and **Library Settings**.



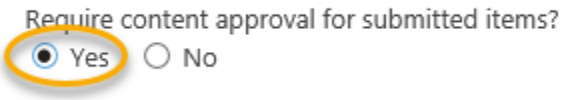
C. Click the **Versioning Settings** link within the **General Settings** region on the **Settings** page.



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 document to test versioning settings.

   A. Click the file 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.

Note
If you do not have word installed or activated, this step may not work. The following steps may also differ based on the version of Word.

   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**. 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.

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.

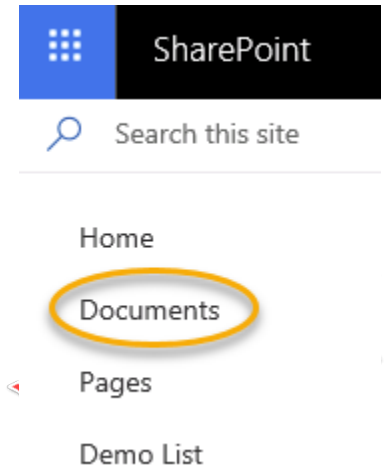
   D. Close Microsoft Word.

Exercise 2: Working with Team Site Libraries

5 to 10 minutes

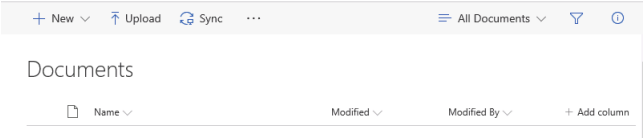
In this exercise, you will work with the default Team Site libraries.

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

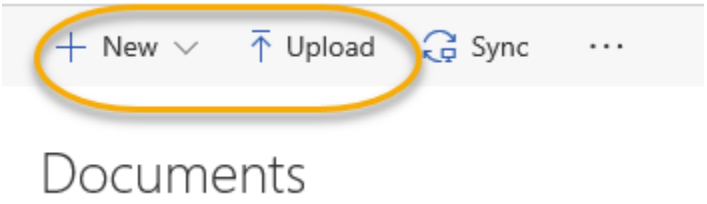


   This should take you to the default view of the library.

   B. Note how the view has **changed**.



   C. Click either the **New** or **Upload** links.



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

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

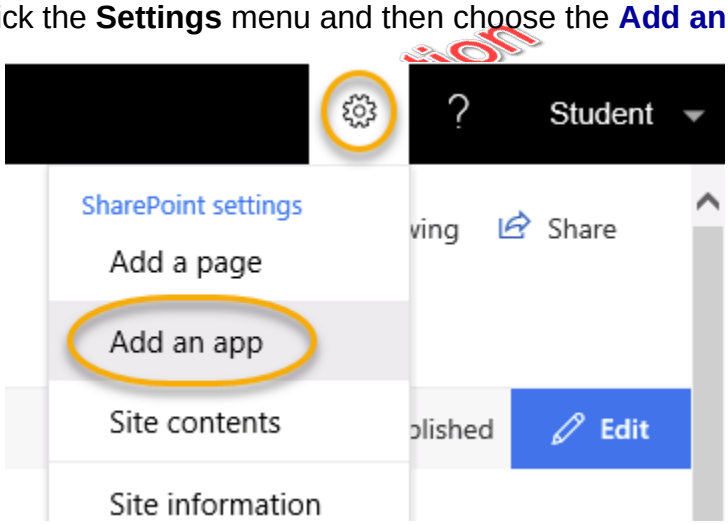
F. Click the **OK** button to complete uploading the file into **Documents** library.

Exercise 3: Creating Libraries

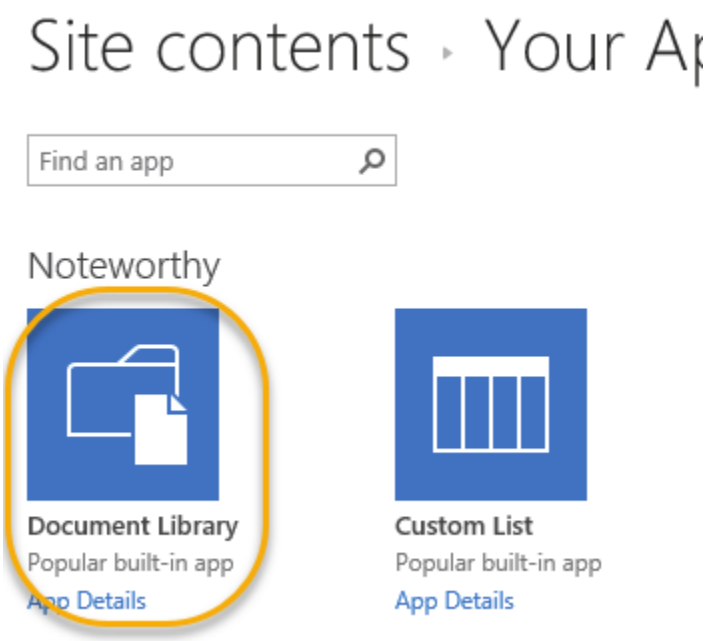
5 to 10 minutes

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.

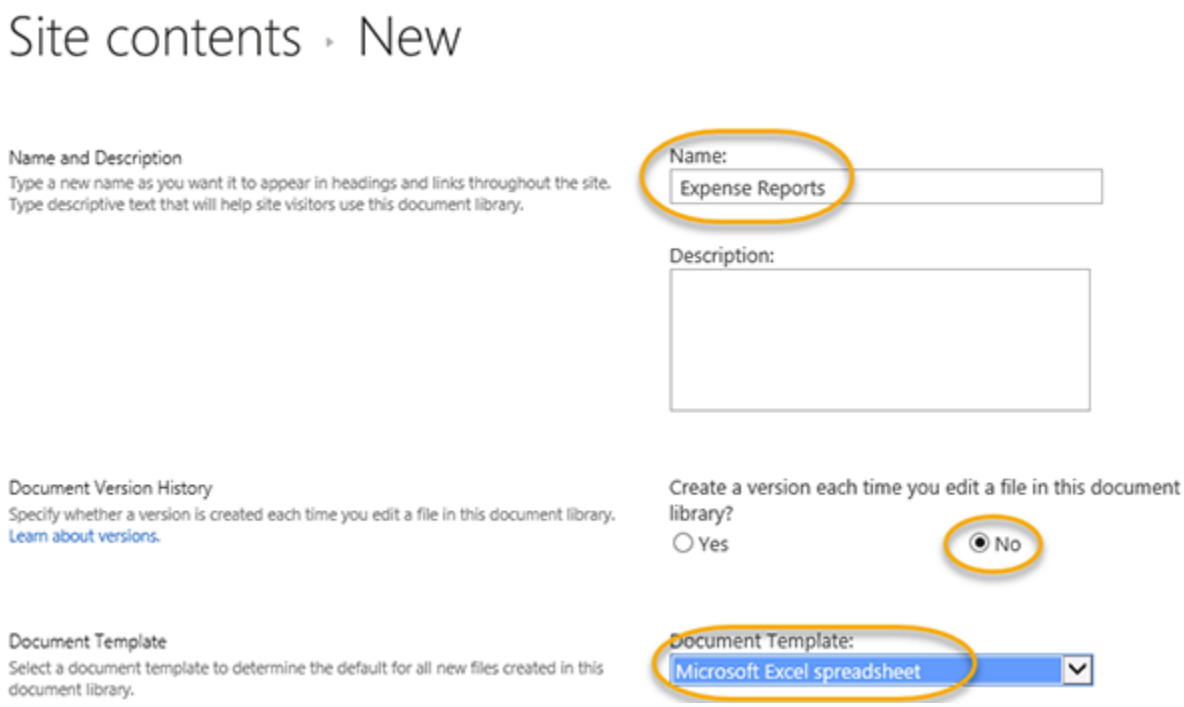


   B. Click the **Document Library** template.



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

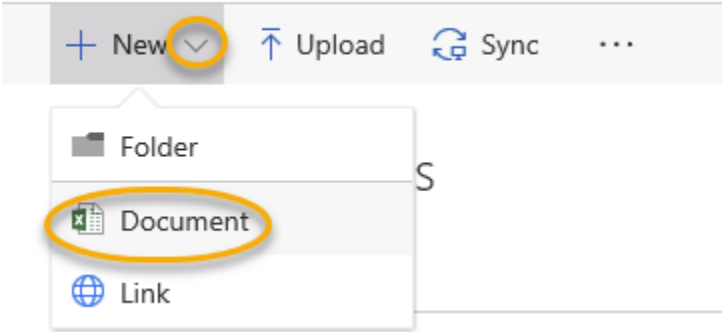
D. In the **New** form that opens enter "Expense Reports" in the **Name** field, choose **No** for the **Document Version History** and choose **Microsoft Excel spreadsheet** from the **Document Template** drop-down field.



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.

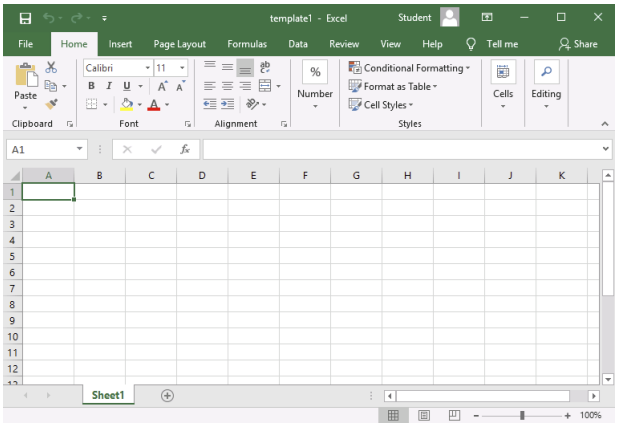


   B. Microsoft Excel should open to a blank spreadsheet based on the **Microsoft Excel spreadsheet** template you chose when creating the **Expense Reports** library.

Looking Forward

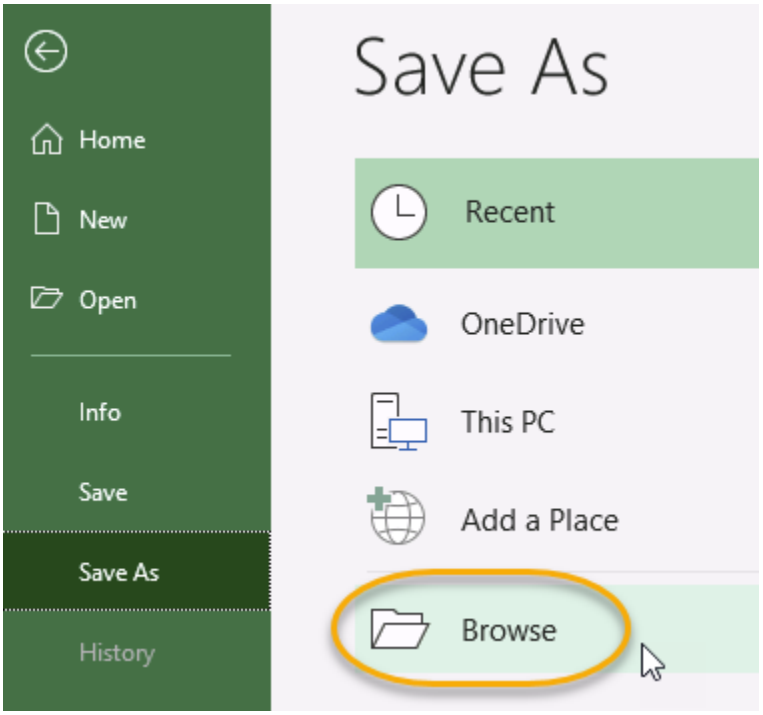
In a later part of this course, you will create custom templates and associate them with libraries.

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

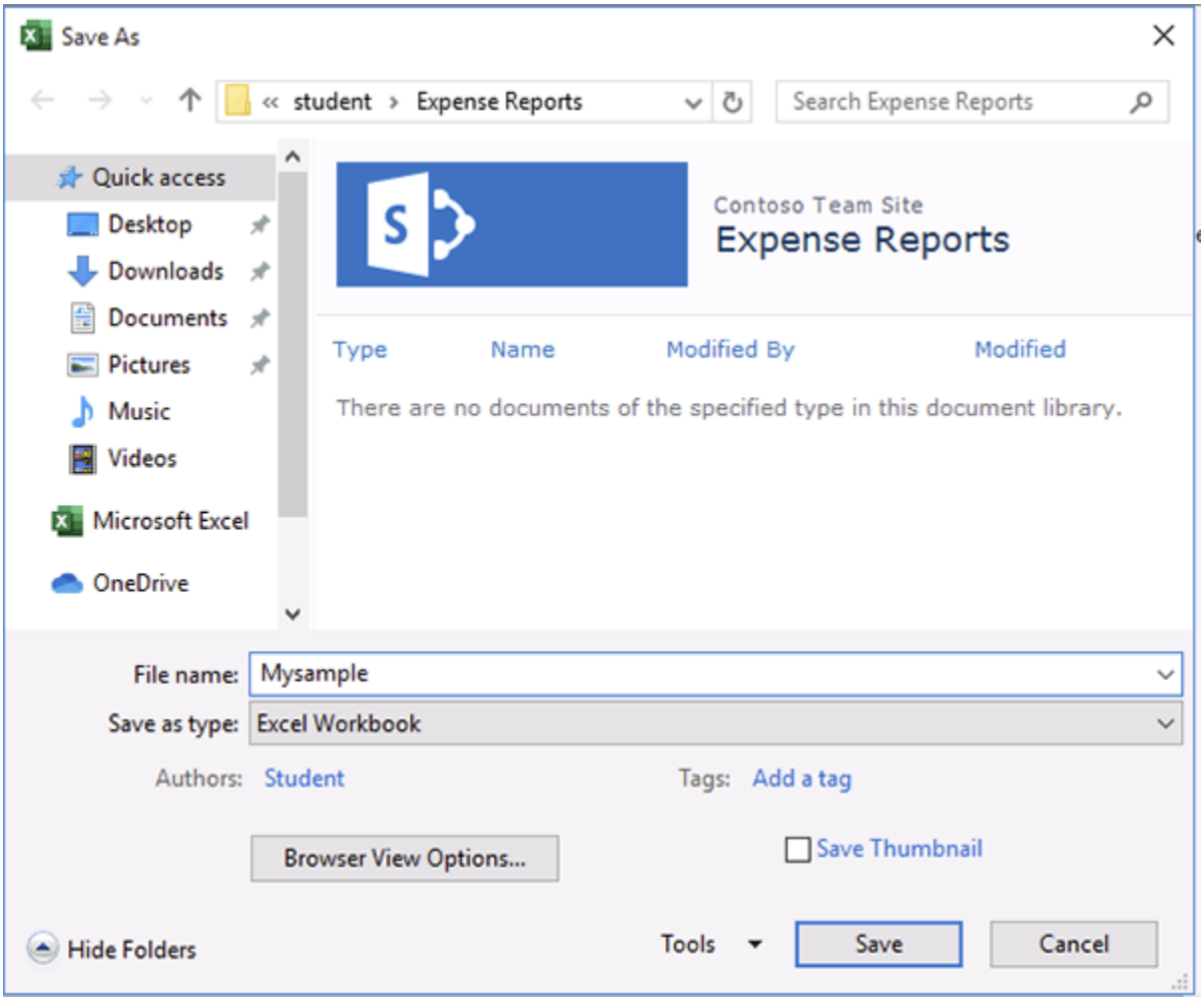


D. Click the **Save** icon at the top left of the Excel window.

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 a name 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.

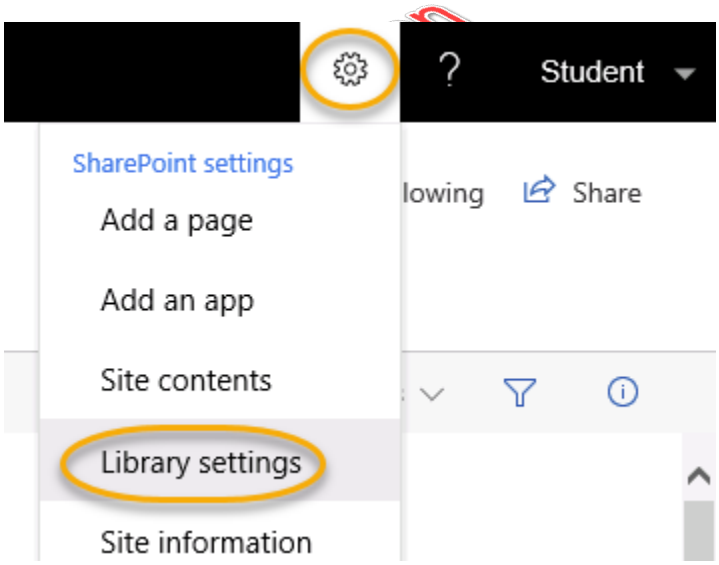
Exercise 4: Document Versioning

15 to 25 minutes

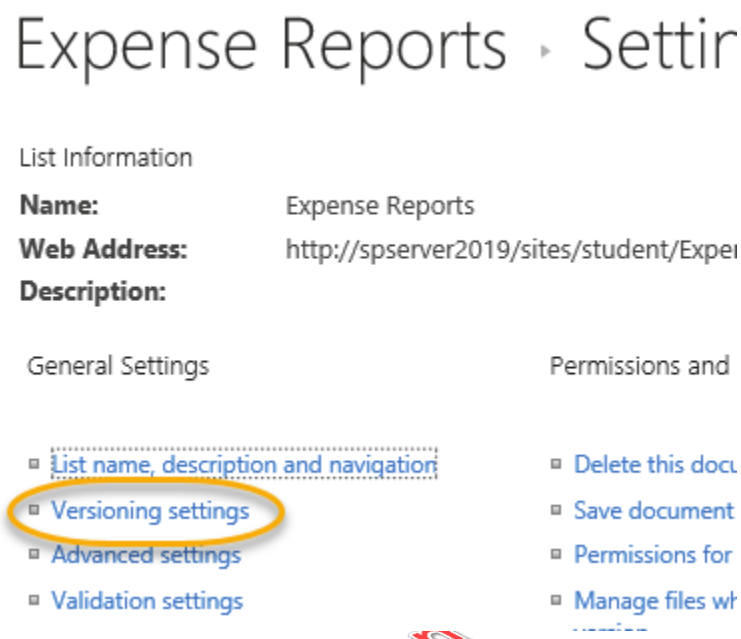
In this exercise, you will enable versioning on the Expense Reports library. Once versioning is enabled, you will test it by modifying a document and then rolling it back to a previous version to undo your changes.

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

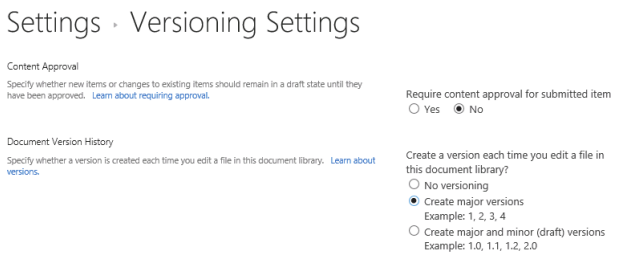
   A. Make sure **Expense Reports** is selected in the **Quick Launch** menu. Click the **Settings** then **Library Settings** to open the options.



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



C. 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.

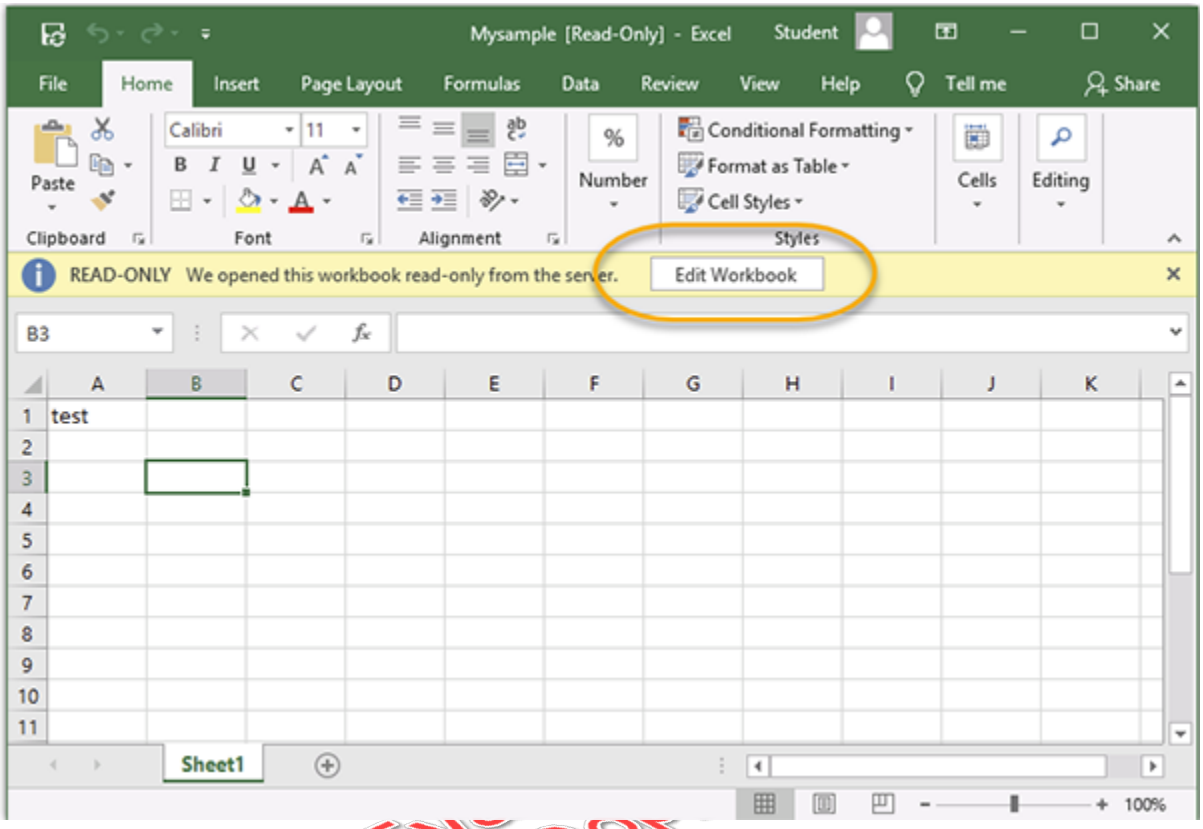


D. Click the **Expense Reports** link in either the **Quick Launch** menu or in the Site **Breadcrumbs** to navigate back to the **Browse** view of the library.

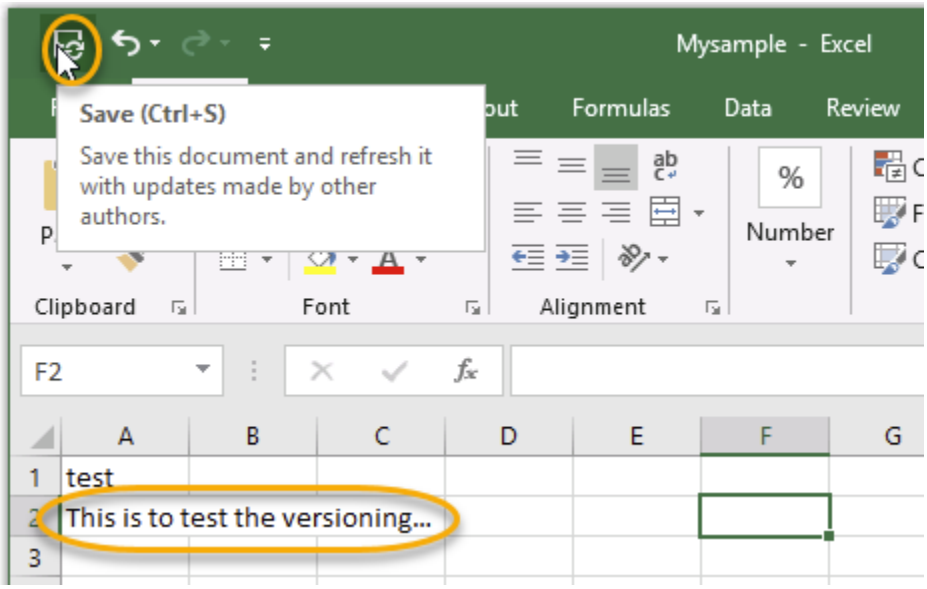
2. Edit a document in the library so that the changes will be stored with a new version of the document.

   A. Click the 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.”



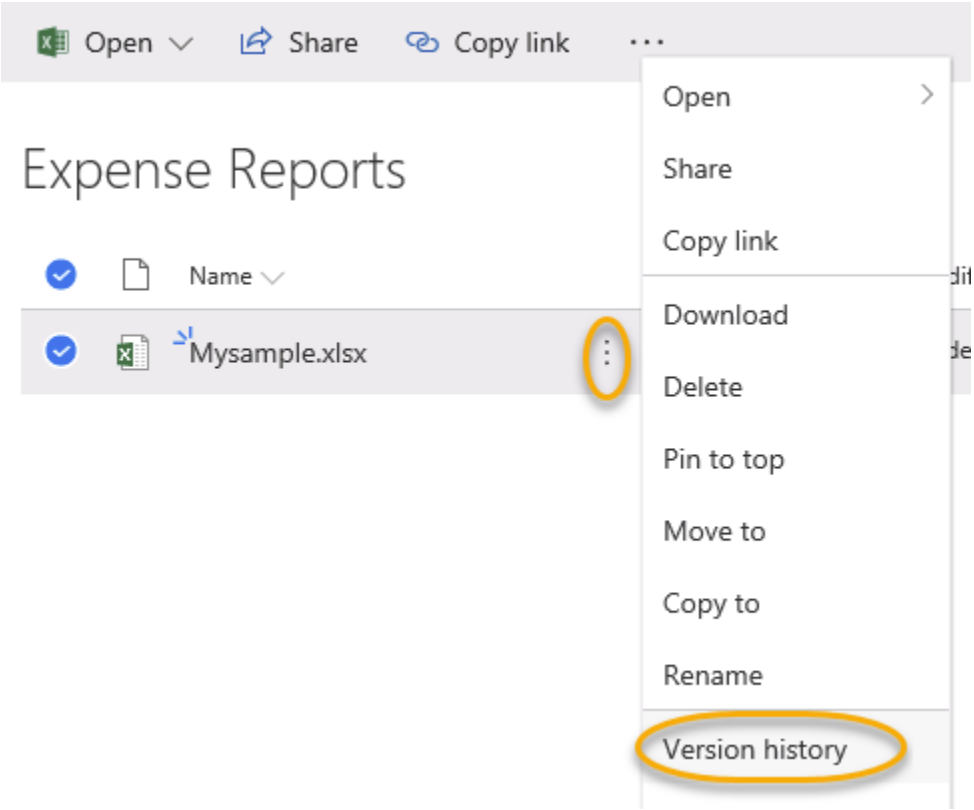
D. Click the **Save** icon at the top left of the Excel window to save your changes.

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.

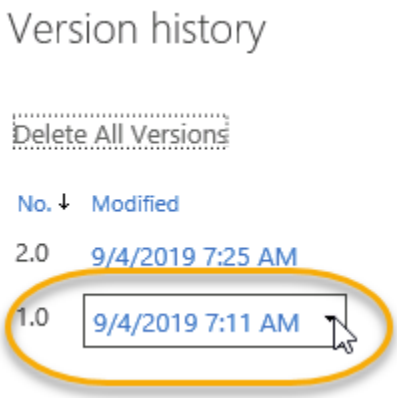
3. View the version history of the document you just edited.

A. Click the ellipsis button next to the 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 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 3
SharePoint List Basics

Topics Covered

☑ 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.

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.

3.1. Creating Apps Using List Templates

In SharePoint 2019, 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
- Tasks
- Issue Tracking
- Custom List

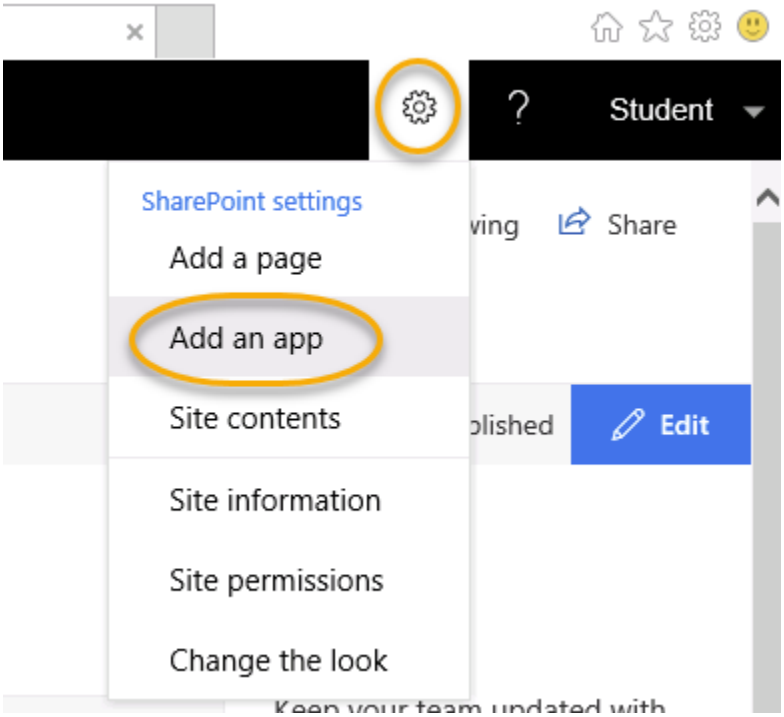
3.2. Creating Lists

❖ 3.2.1. Creating Lists Using List Templates

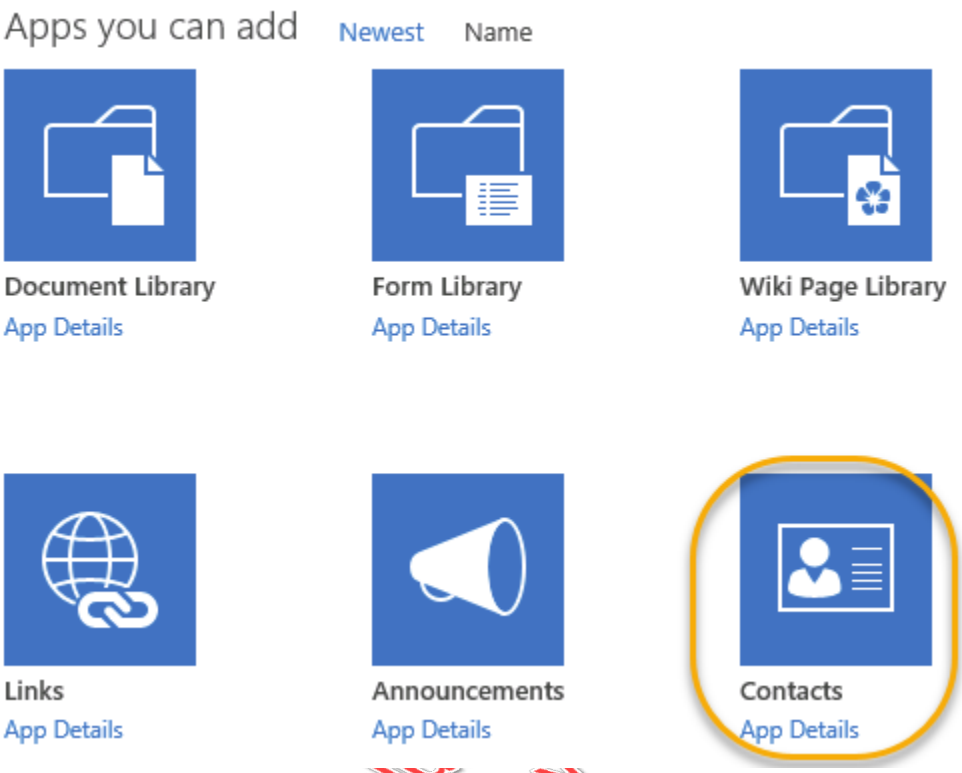
The following walk-through will show you how to create new lists using some of the standard out-of-the-box list templates.

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



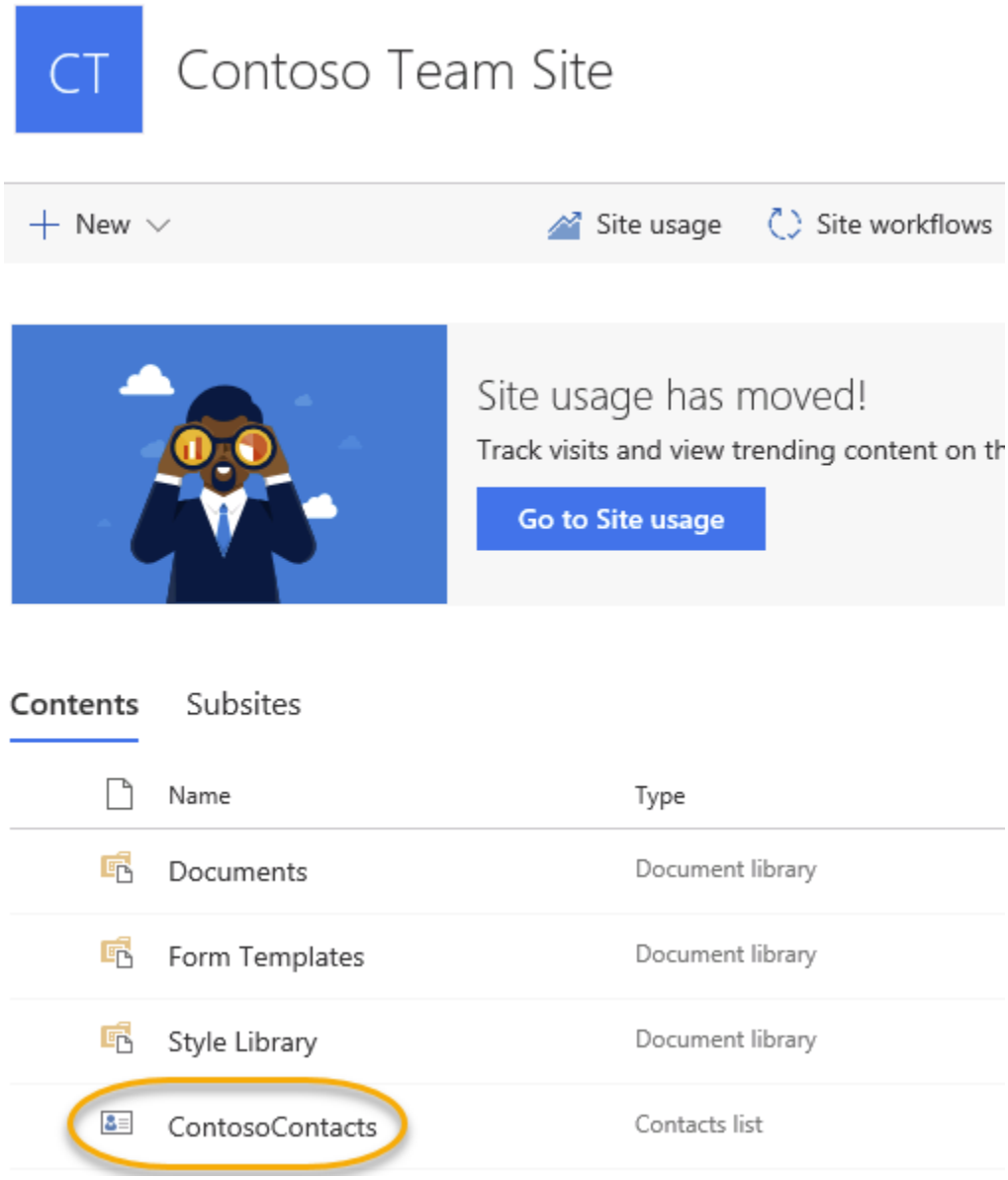
C. Enter "ContosoContacts" in the **Name** field and click the **Create** button.

Naming Conventions

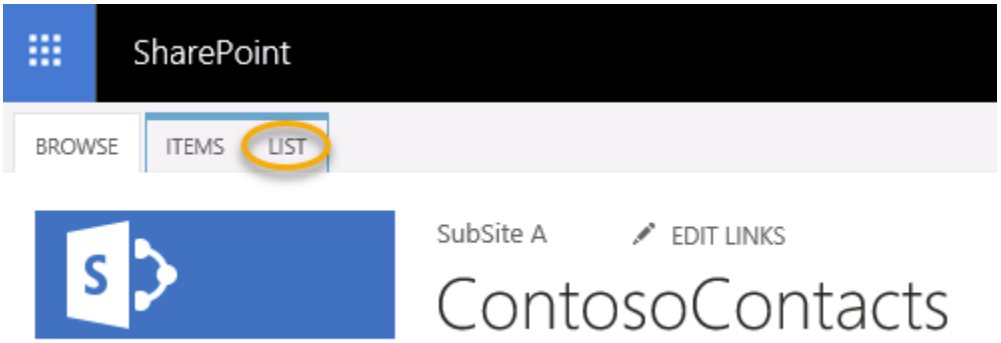
Many website administrators feel strongly about not using spaces when naming a list, library, or new site. The reason for this is that the spaces will be replaced with "'%20" characters in the URL. This can make the URL difficult to read and links can become convoluted.

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.

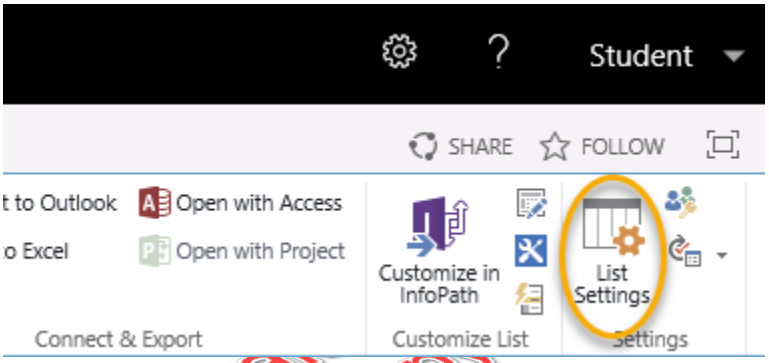
D. Note that **ContosoContacts** are now displayed on the **Site Contents** page.



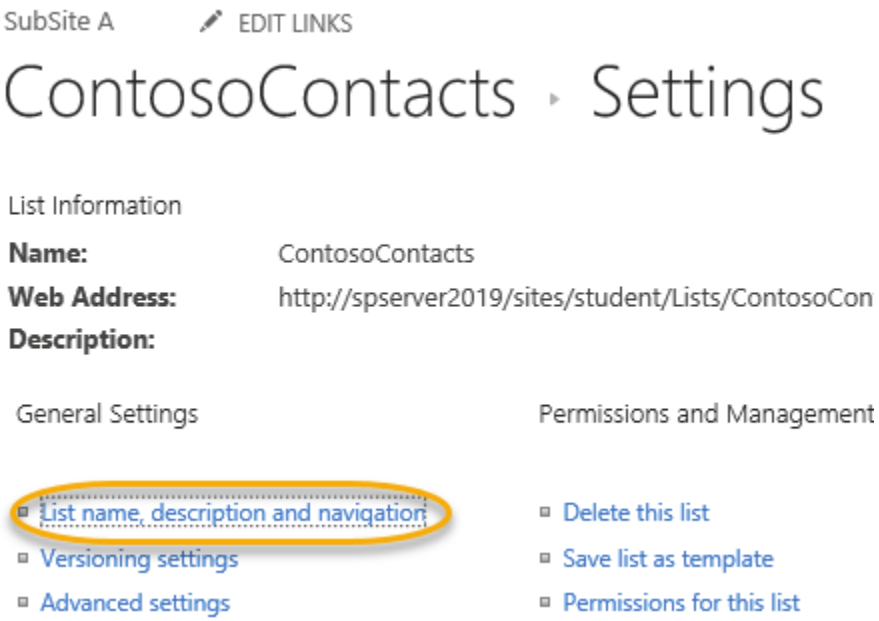
2. Add a permanent link to **ContosoContacts** in the **Quick Launch** menu.
   A. Click the **ContosoContacts** link.
   B. Click the **List** tab to navigate to the **List Toolbar**.



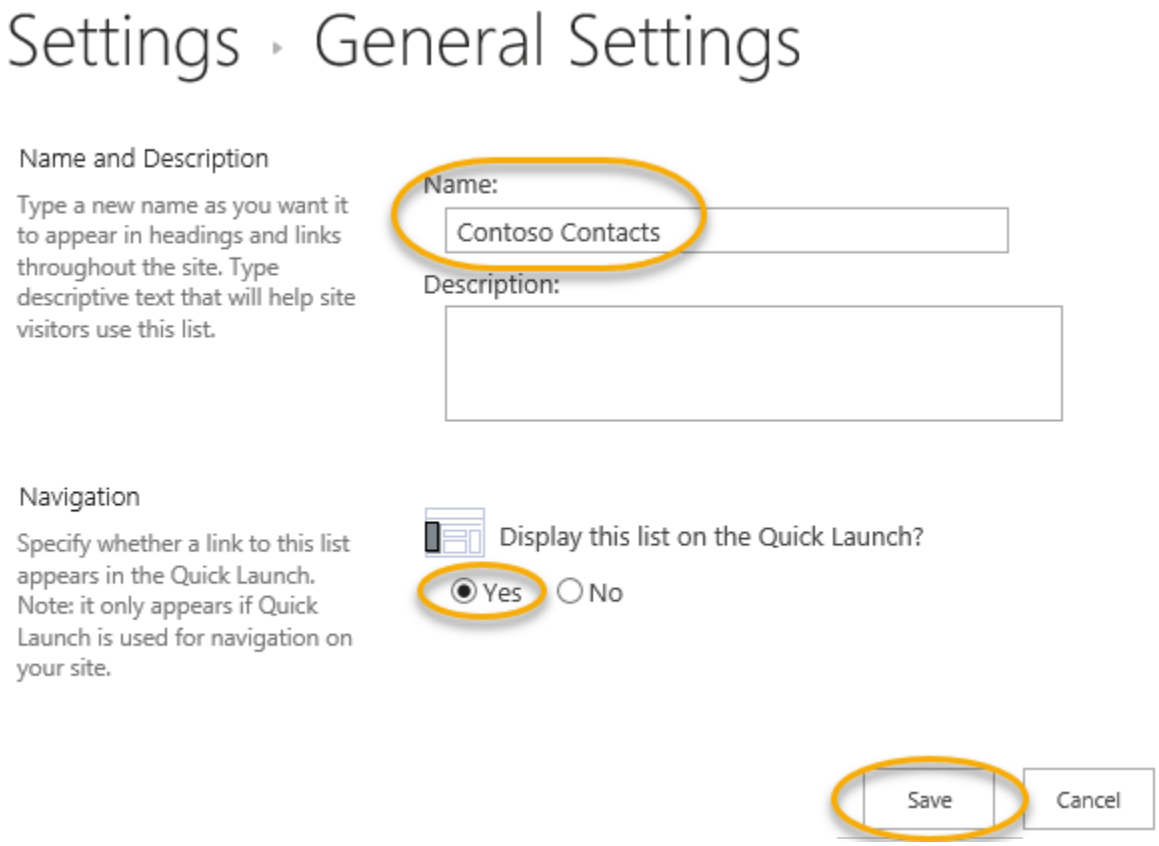
C. Click the **List Settings** link button on the **List** tab toolbar.



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



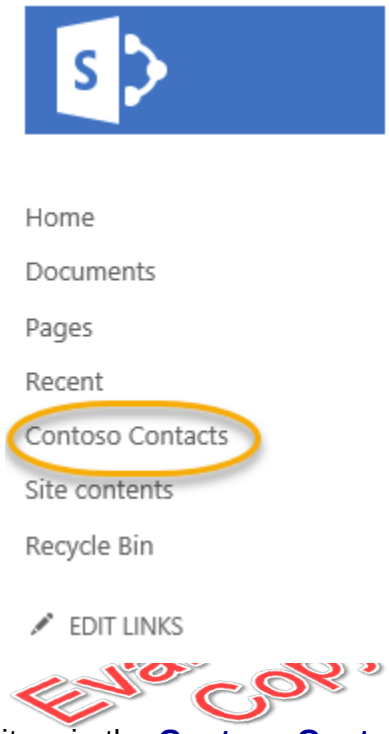
E. Click the **Yes** radio button to add **Contoso Contacts** to the site's **Quick Launch** menu and click the **Save** button.



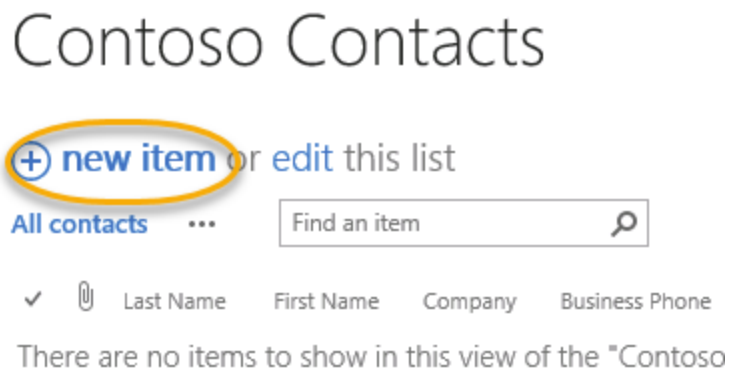
Note

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.

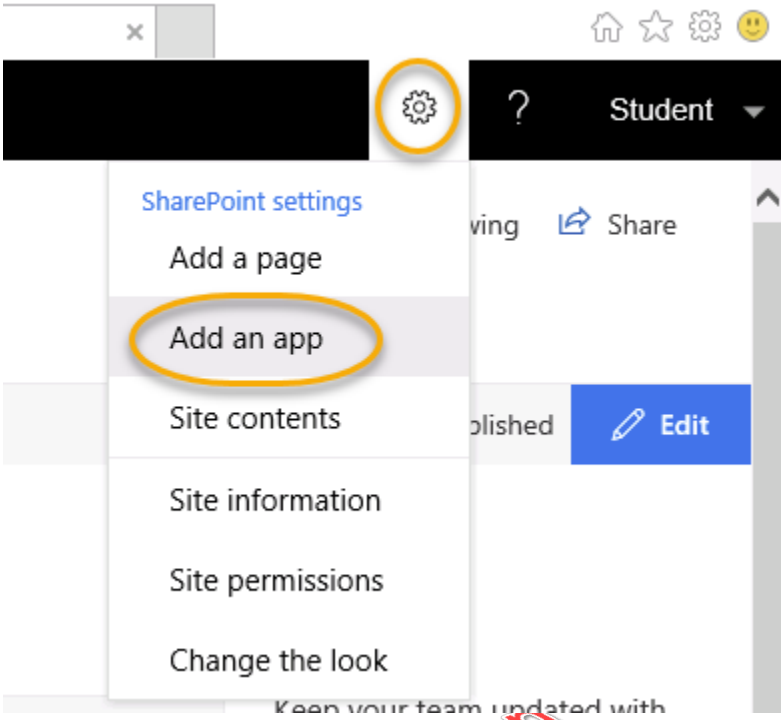


C. In the **Contoso Contacts - New Item** form, use the following table to fill in the fields and click the **Save** button. Note that only the **Last Name** field is required.

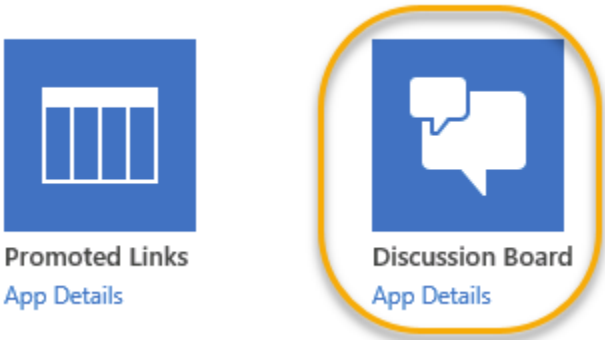
Field	Data
Last Name	Simpson
First Name	Marge
Full Name	Marge Simpson
Email Address	Marge@Contoso.com
Company	Contoso

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.

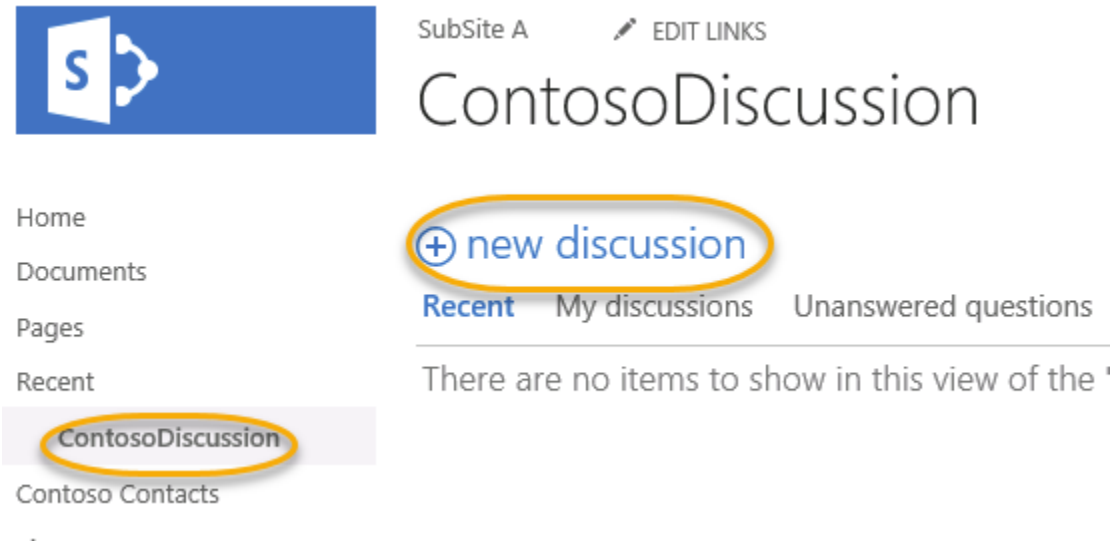


C. Enter "ContosoDiscussion" in the **Name** field and then click the **Create** button.

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

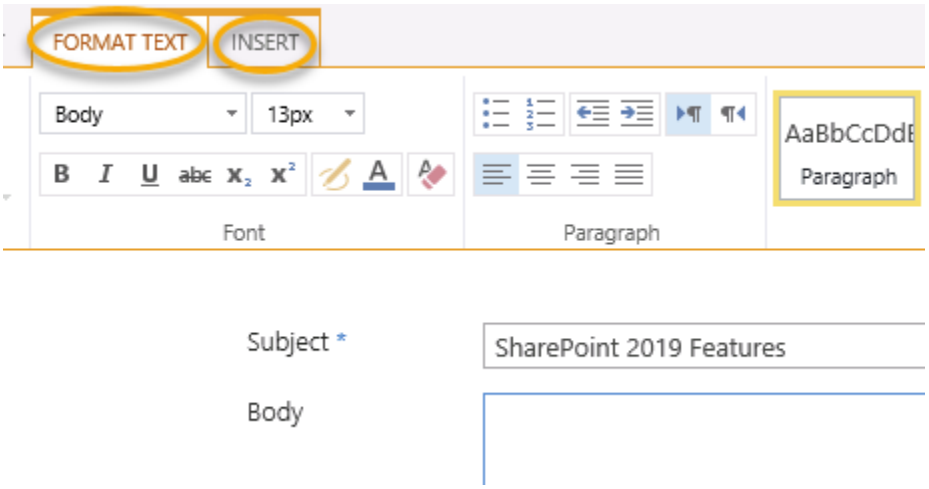
5. Create a new discussion in the **ContosoDiscussion** list.

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

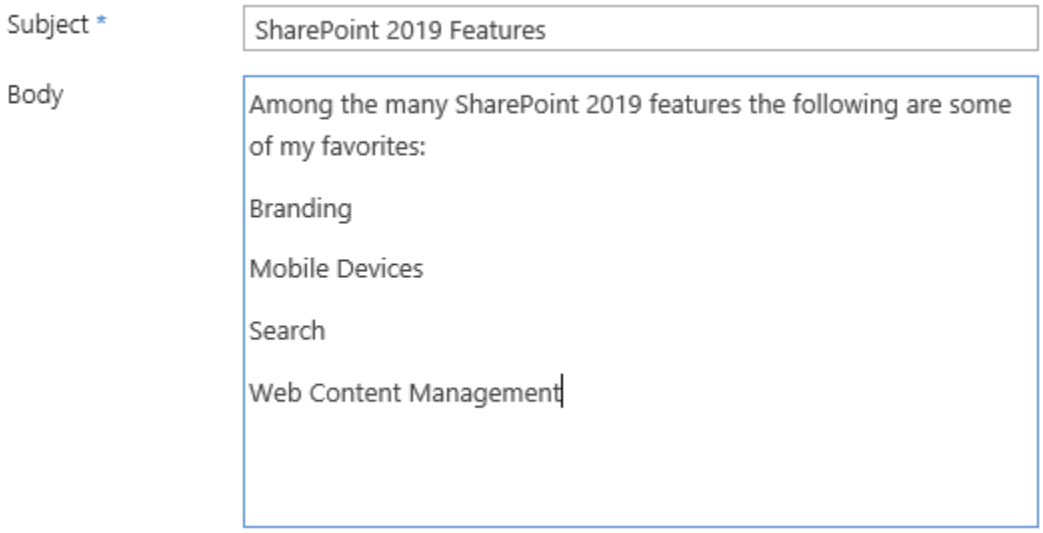


B. In the new discussion form, enter "SharePoint 2019 Features" for the **Subject** field.

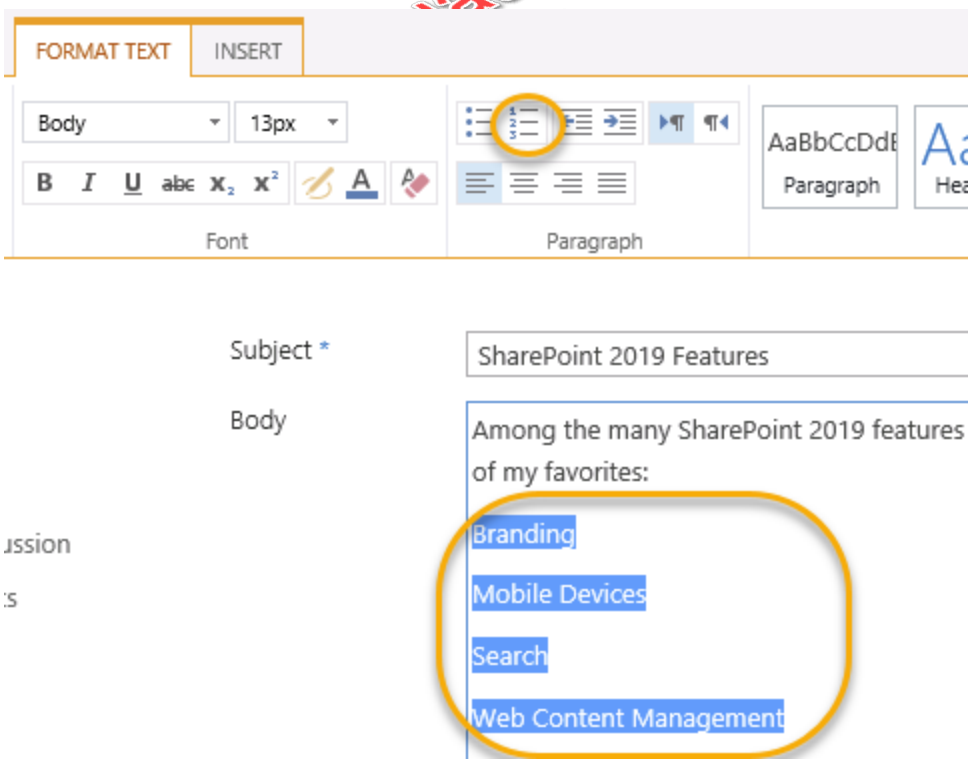
C. Click inside the **Body** field. Note that the discussion form now has a toolbar at the top with two tabs **Format Text** and **Insert**.



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



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.

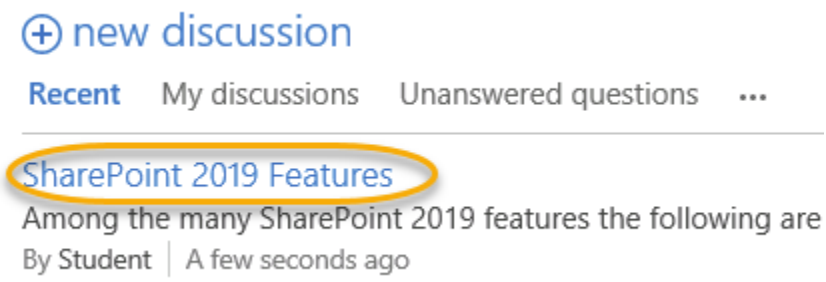


Question Check box
Note the **Question** check box. When this is checked, it is used as a filter for an **Unanswered Questions** view. Views will be covered in a later part of this course.

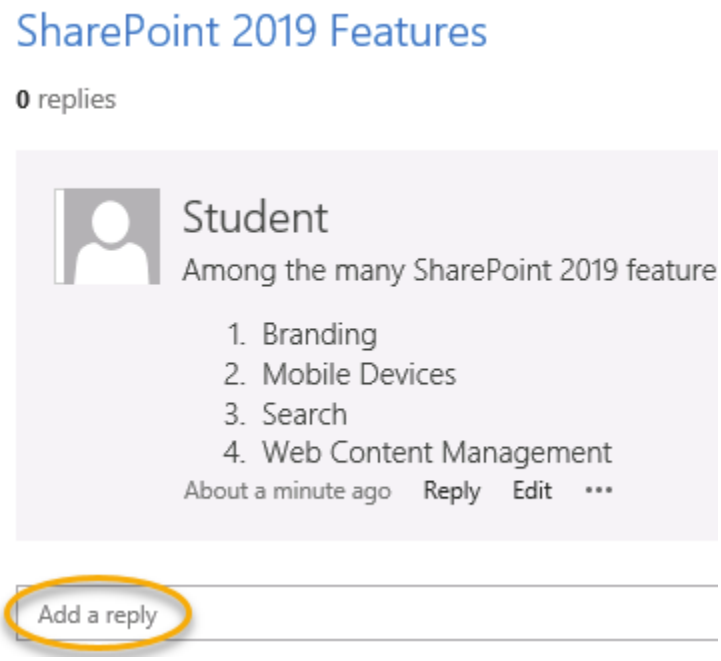
F. Click the **Save** button to save it to the list.

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

   A. Click the new discussion subject **SharePoint 2019 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.



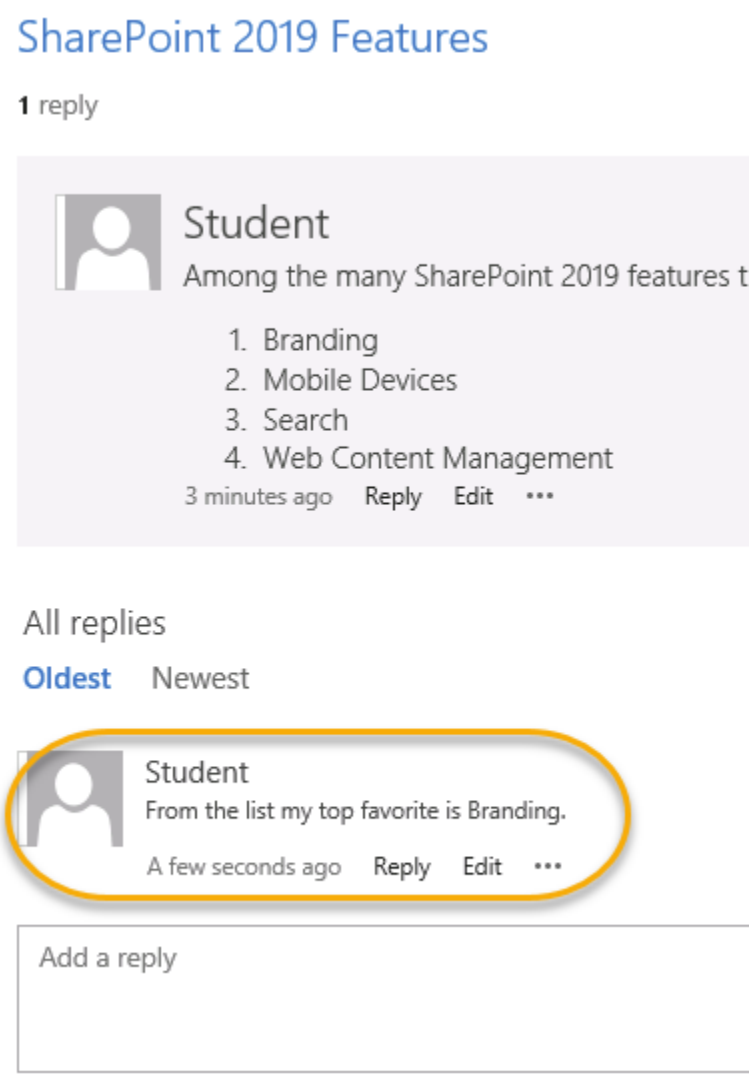
> **Note**
>
> Normally a different user would be replying to a new discussion item, but this walk-through uses a single account.

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.

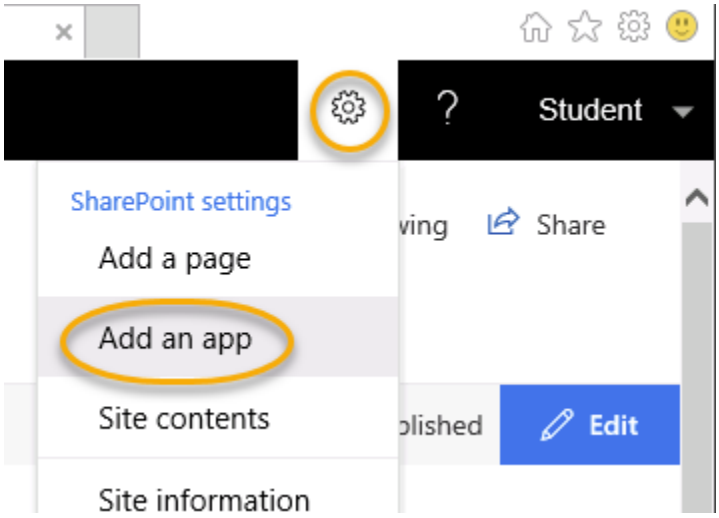


3.3. List Columns

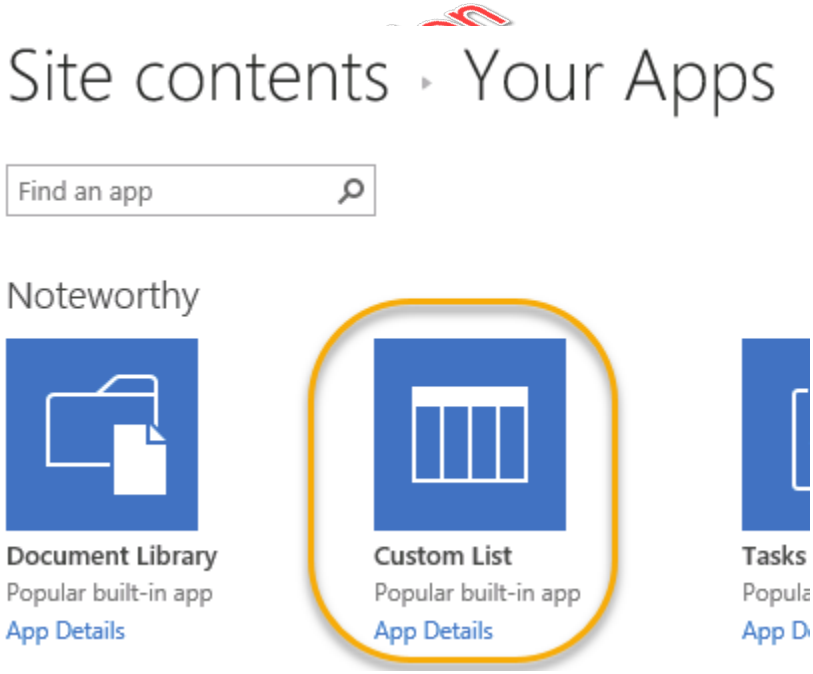
❖ 3.3.1. Creating List Columns

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.

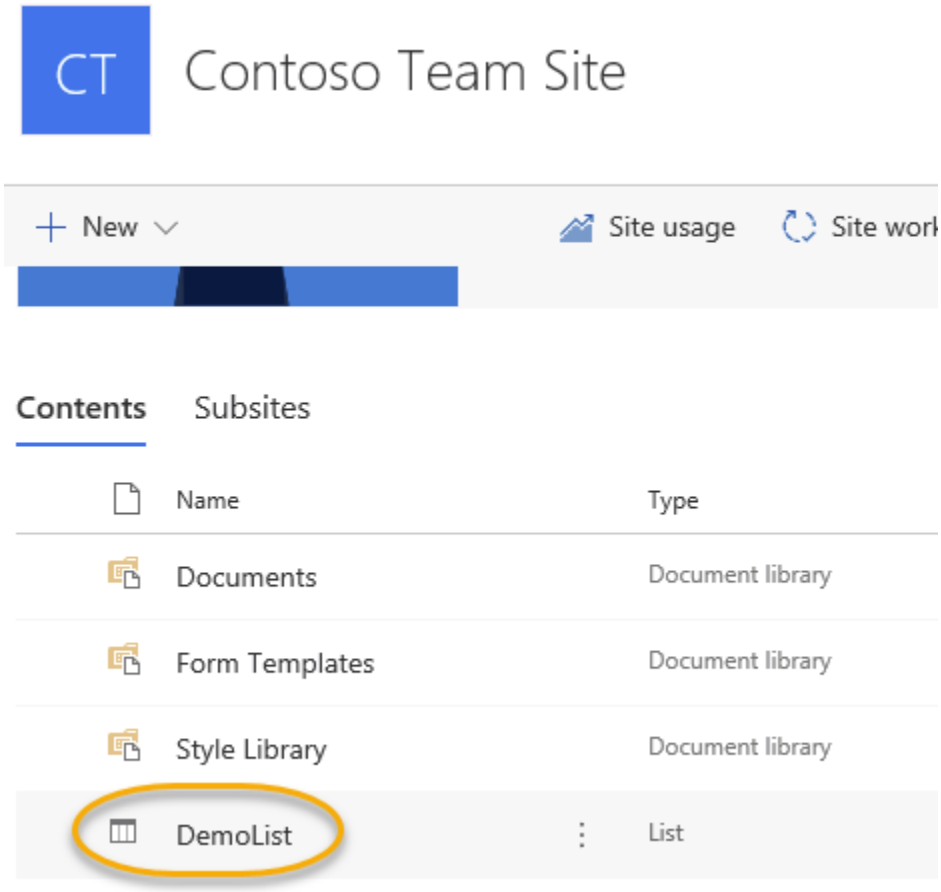


   B. Select the **Custom List** template from the list of available templates.

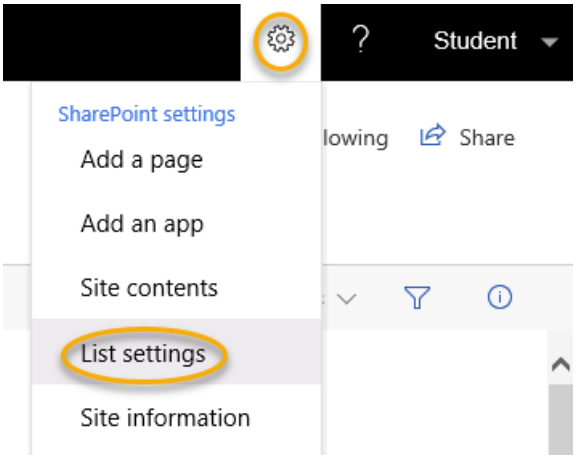


   C. Enter “DemoList” in the **Name** field and then click the **Create** button.

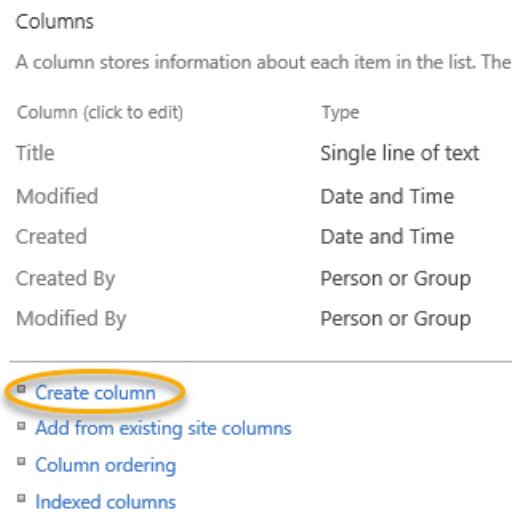
2. Add a new **Single line of text** list column to **Demo List**.
   A. Click the **DemoList** link.



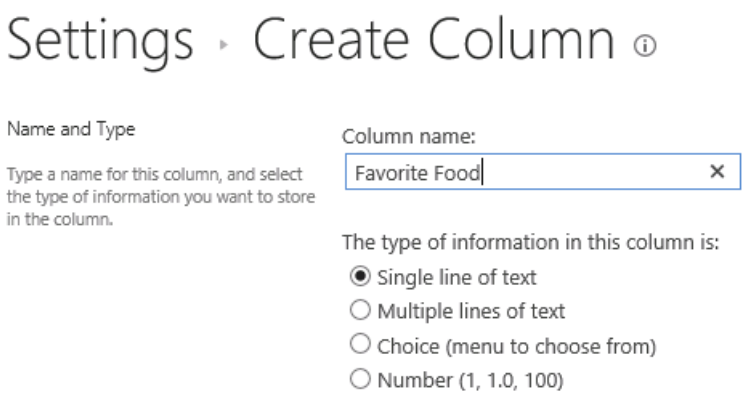
B. Click the **List** tab to open the lists toolbar if you are in a classic view. If you are using the default modern view: click **Settings**, then **List Settings**.



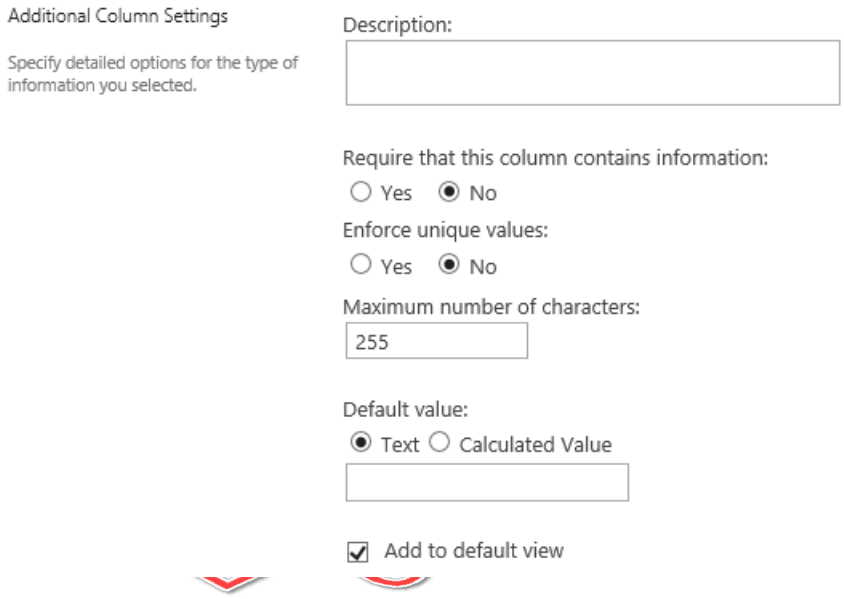
C. Click the **Create Column** button link in the **List** tab toolbar if you are using classic view. If you are using the default modern view: click **Create Column** under the **Columns**.



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 if you are using classic view. If you are using the default modern view: click **Create Column** under the **Columns**.
   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 **Drop-Down Menu**. See the following image for some suggested colors to add:

Settings ▸ Create Column

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

Favorite Color

The type of information in this column is:

- ○ Single line of text
- ○ Multiple lines of text
- ◉ Choice (menu to choose from)
- ○ Number (1, 1.0, 100)
- ○ Currency ($, ¥, €)
- ○ Date and Time
- ○ Lookup (information already on this site)
- ○ Yes/No (check box)
- ○ Person or Group
- ○ Hyperlink or Picture
- ○ Calculated (calculation based on other columns)
- ○ Task Outcome
- ○ External Data
- ○ Managed Metadata

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

○ Yes ◉ No

Enforce unique values:

○ Yes ◉ No

Type each choice on a separate line:

Red
Blue
Green
Orange

Display choices using:

- ◉ Drop-Down Menu
- ○ Radio Buttons
- ○ Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:

○ Yes ◉ No

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.

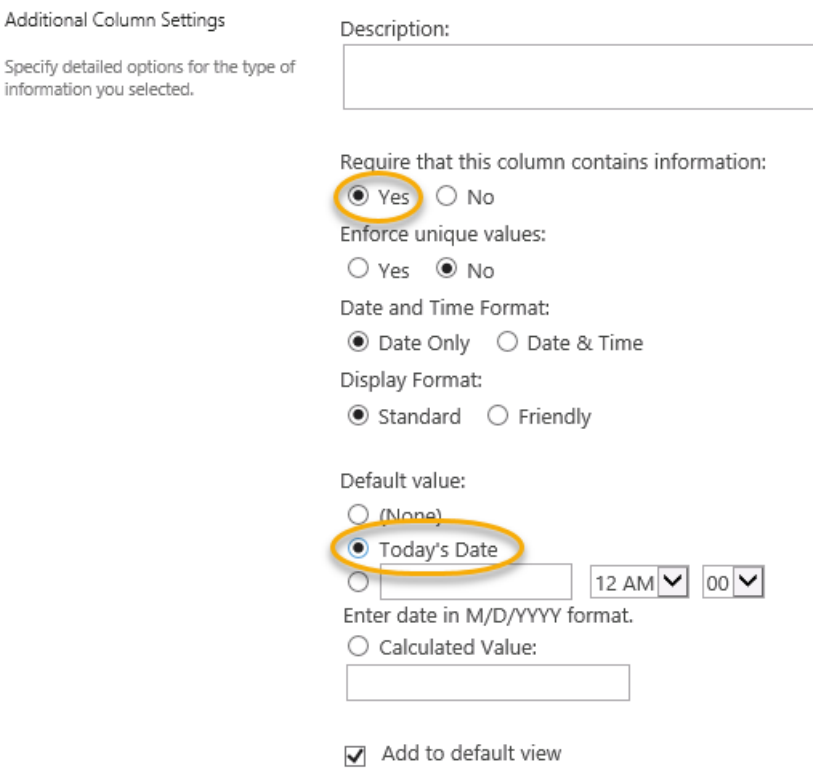
D. Click the **OK** button to complete creating the new list column.

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

   A. Click the **Create Column** button link in the **List** tab toolbar if you are using classic view. If you are using the default modern view: click **Create Column** under the **Columns**.

   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**.



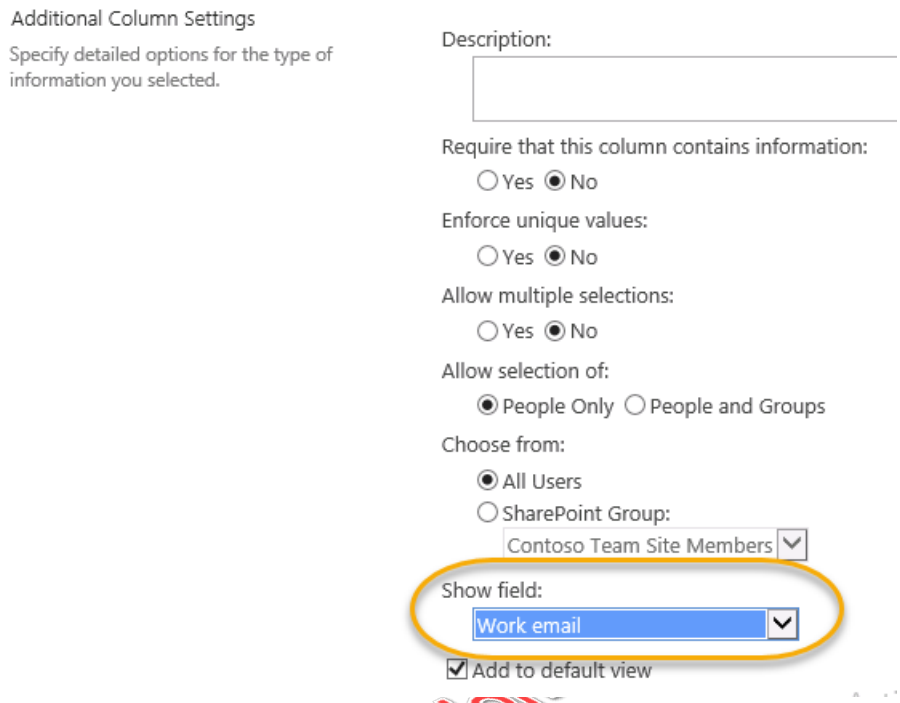
D. Click the **OK** button to complete creating the new list column.

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

   A. Click the **Create Column** button link in the **List** tab toolbar if you are using classic view. If you are using the default modern view: click **Create Column** under the **Columns**.

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

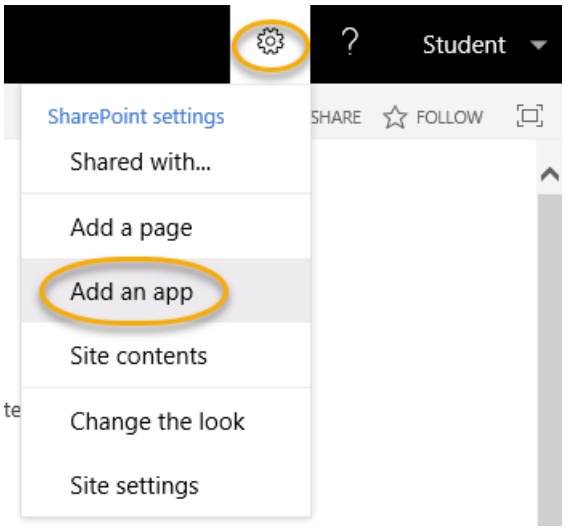
   C. In the **Additional Column Settings** region, change the **Show field** drop-down box to **Work email**.



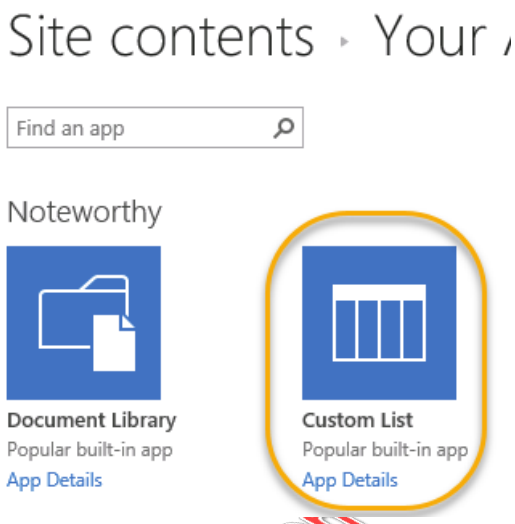
D. Click the **OK** button to complete creating the new list column.

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 to navigate to the list.

E. Click the **Create Column** button link in the **List** tab toolbar if you are using classic view. If you are using the default modern view: click **Create Column** under the **Columns**.

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

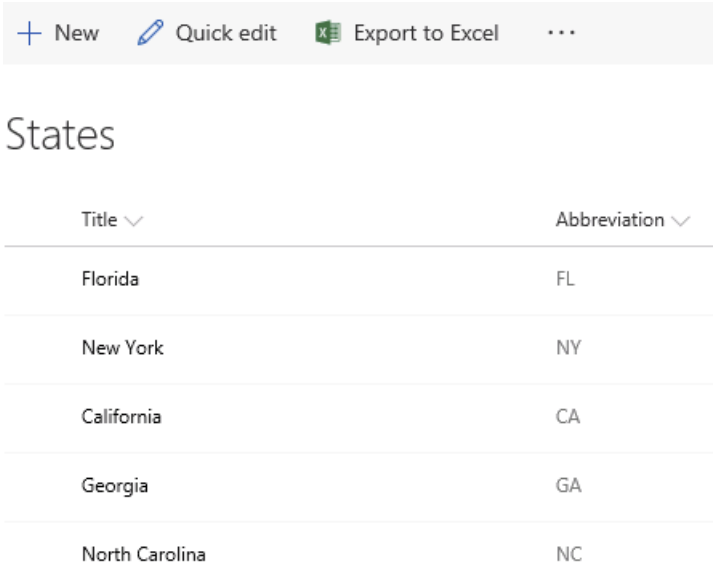
G. Click the **OK** button to complete creating the column.

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

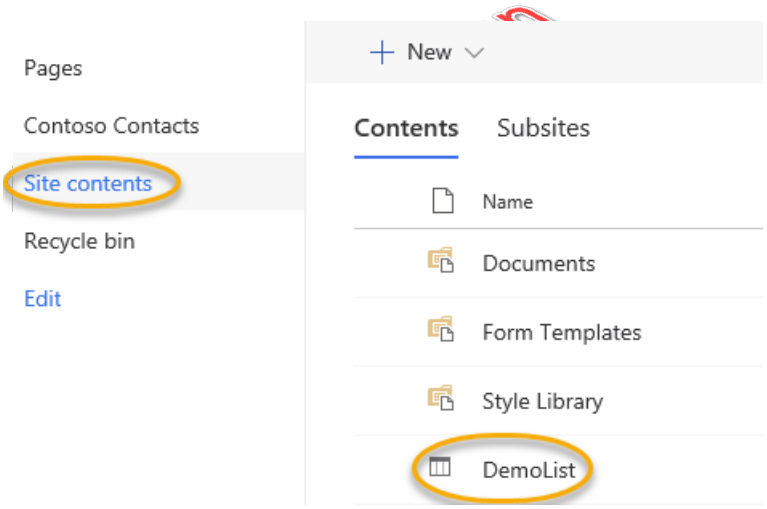
I. Enter “Florida” in the **Title** field text box and “FL” in the **Abbreviation** text box.

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. You may need to click **Site Contents** first, then **Demo List**.

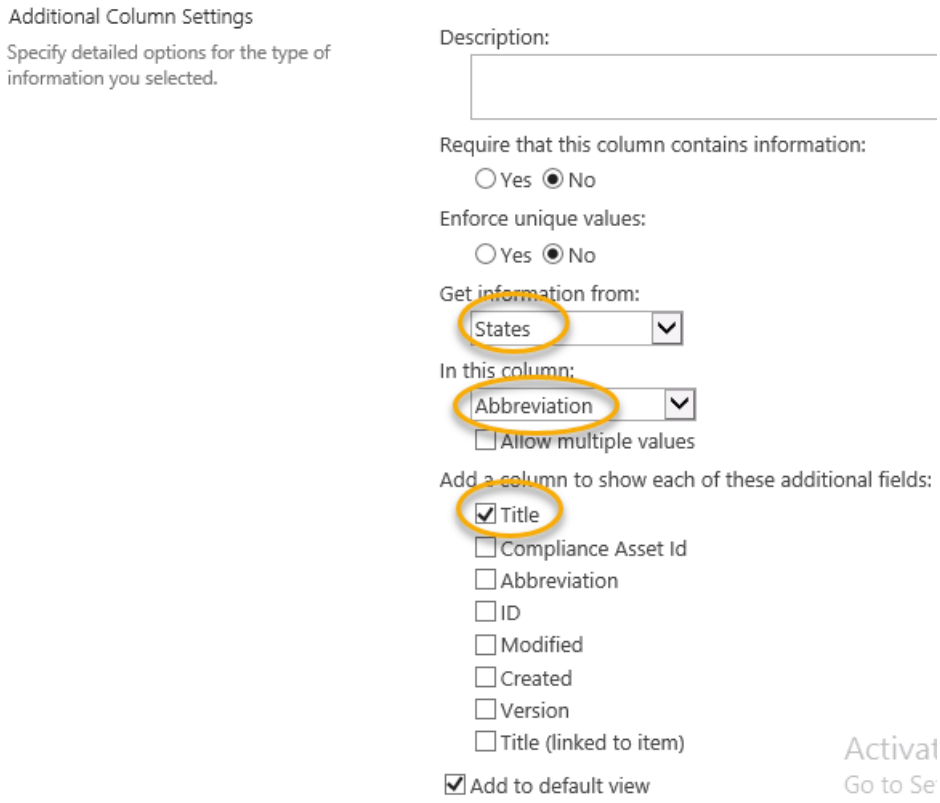


M. Click the **List** tab to open the lists toolbar if you are in a classic view. If you are using the default modern view: click **Settings**, then **List Settings**.

N. Click the **Create Column** button link in the **List** tab toolbar if you are using classic view. If you are using the default modern view: click **Create Column** under the **Columns**.

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.

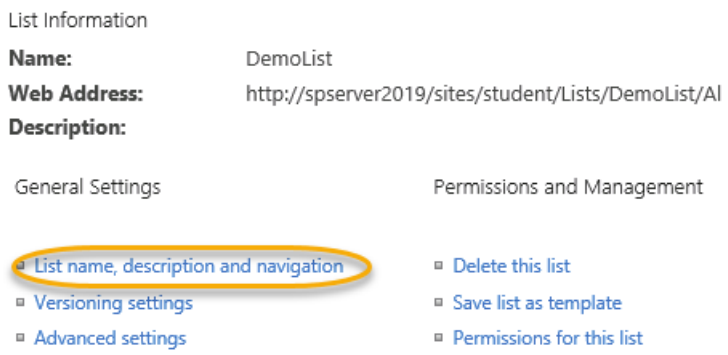


Q. Click the **OK** button to complete creating the new list column.

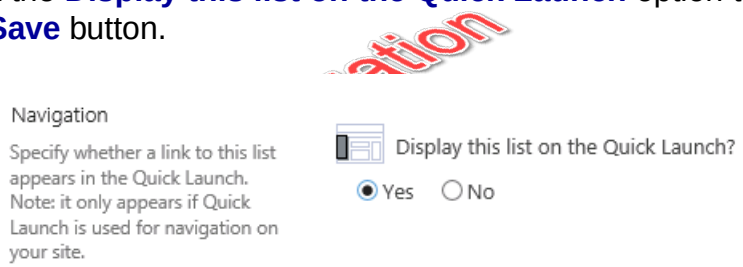
7. Set **Demo List** to permanently display in the **Quick Launch** menu.

   A. Click the **List** tab to open the lists toolbar if you are in a classic view. If you are using the default modern view: click **Settings**, then **List Settings**.

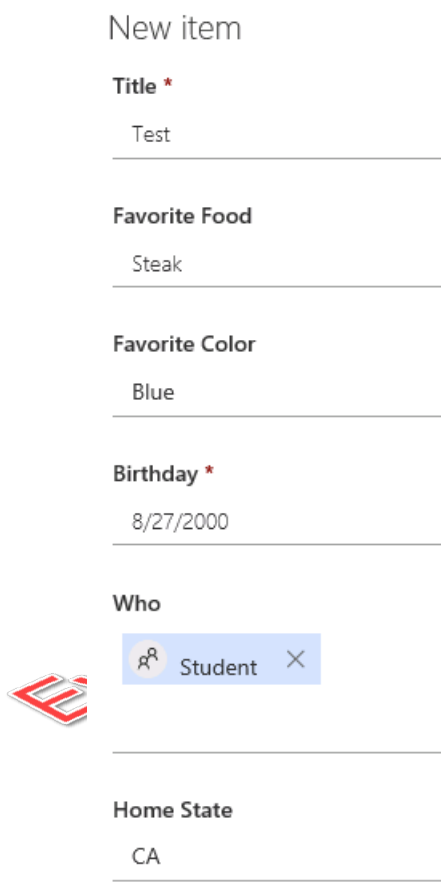
   B. Click the **List name, description and navigation** link on the **Settings** page.



C. 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

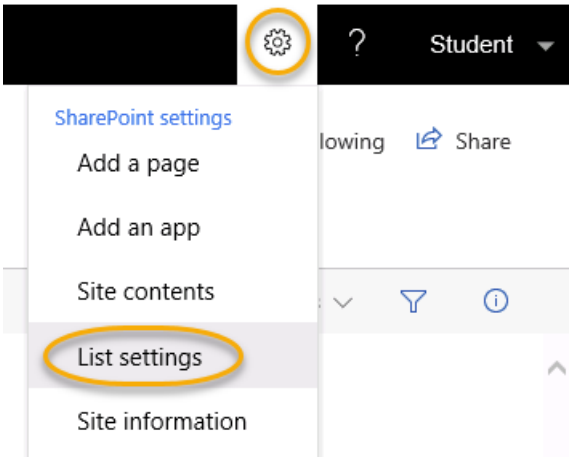
For the **Who** field, you can optionally click a name from the drop-down list that SharePoint provides.

3.4. Column Validation

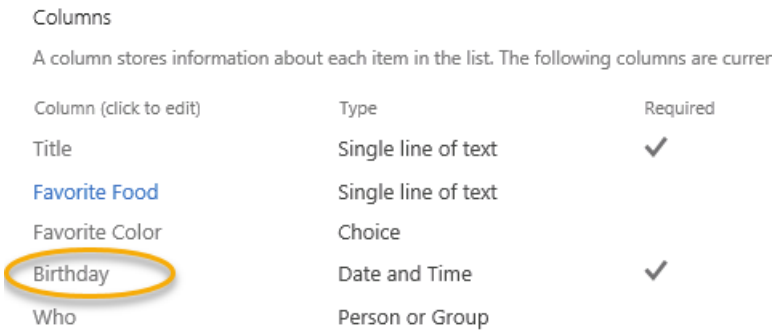
❖ 3.4.1. Validating a List Column

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.

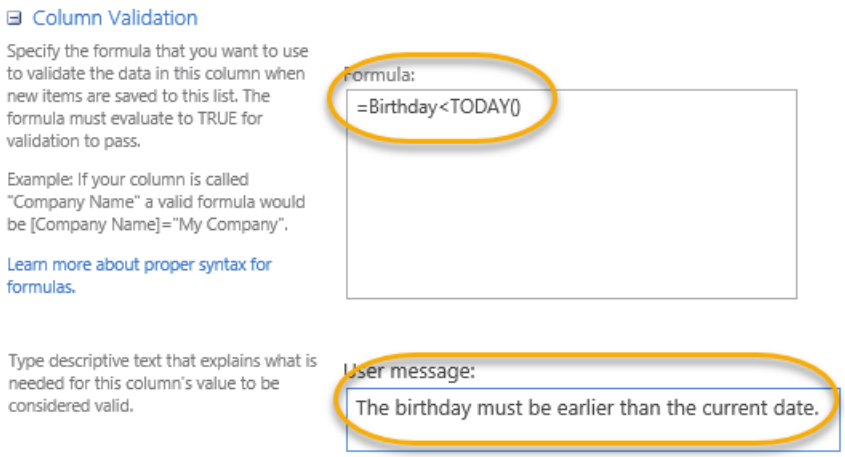
1. Configure validation on the **Birthday** column within the **Demo List**.
   A. Select the **Demo List** from the **Quick Launch** menu if you are not already on the list.
   B. Click the **List** tab at the top of the list's page to open the **List** toolbar. Click the **List Settings** button on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



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



D. 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.

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

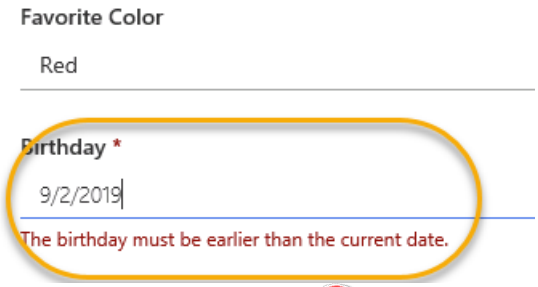
2. Test the new column for validation.

   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.

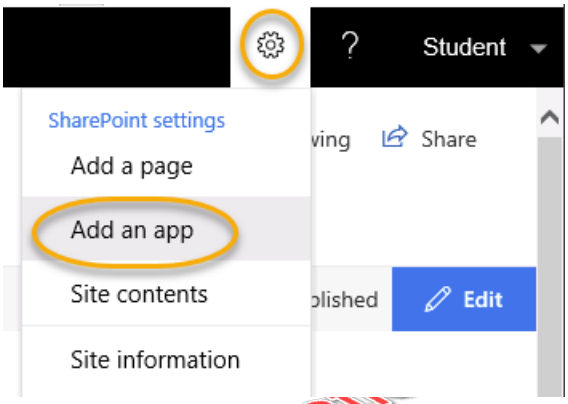
Exercise 5: Working with Team Site Lists

10 to 15 minutes

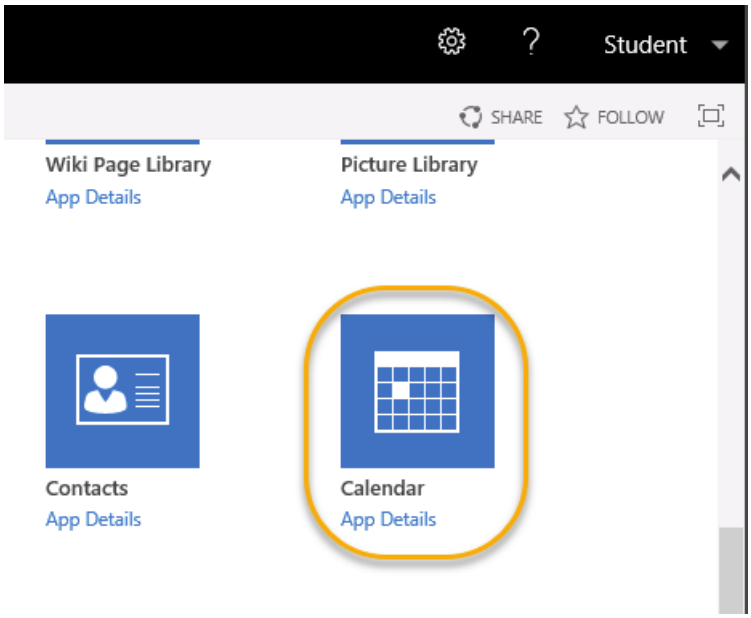
In this exercise, you will work with some of the default list templates in SharePoint 2019.

1. Create a new Calendar list.

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



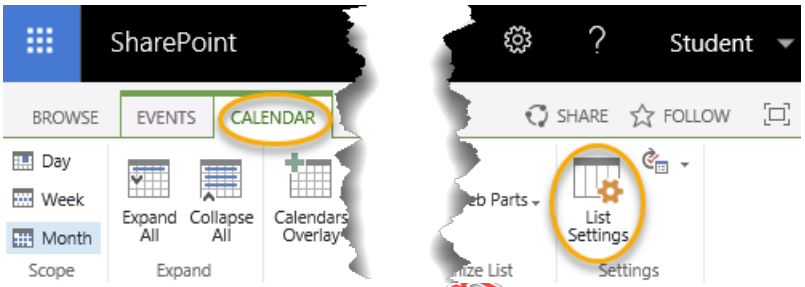
   B. Scroll down the list of templates to locate and select the **Calendar** template from the list of available templates.



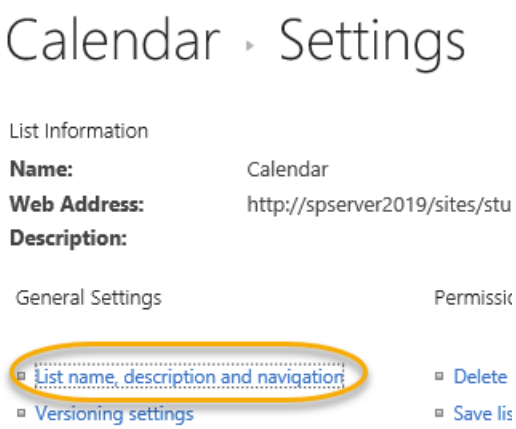
   C. Enter “Calendar” in the **Name** field and then click the **Create** button.

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

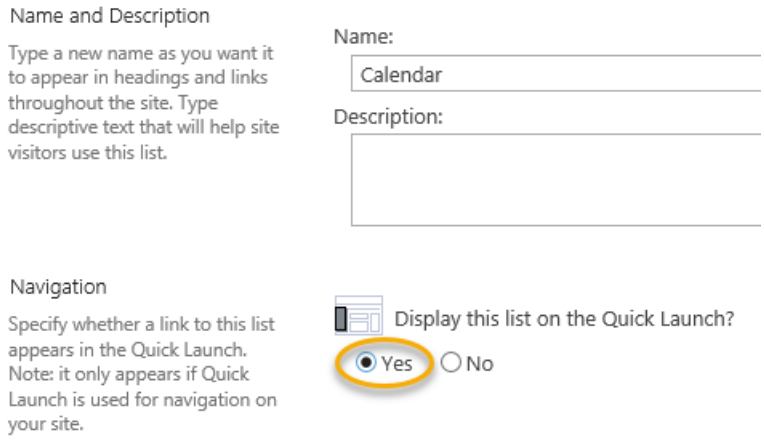
   A. Click the **Site Contents** link in the **Quick Launch** menu click **Calendar**. Click the **Calendar** tab at the top of the list's page to open the **Calendar** toolbar. Click the **List Settings** button on the **List** tab toolbar to navigate to the list settings page. If you are using the default modern view: click **Settings**, then **List Settings.**



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



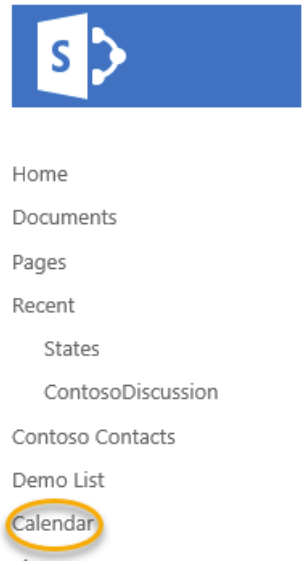
   C. Click the **Yes** radio button to add **Calendar** to the site's **Quick Launch** menu and click the **Save** button.



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.

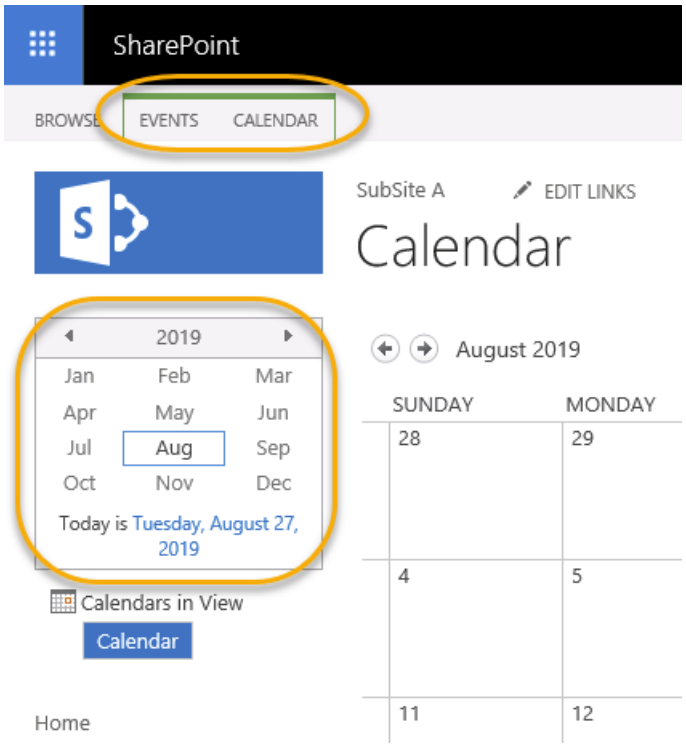
D. Note that **Calendar** now shows on the site's **Quick Launch** menu as a root-level item.



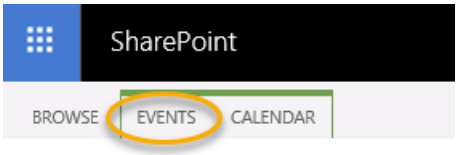
3. Create a Calendar entry.

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

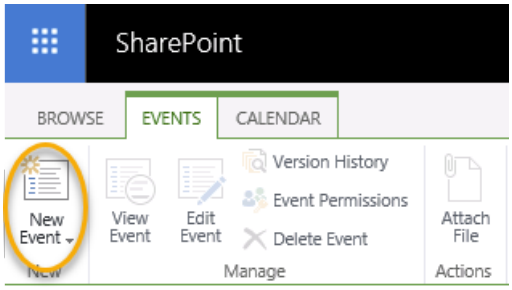
   B. Note how this calendar view has added a couple of new tabs to the top of the page next to the **Browse** tab. In addition, the **Quick Launch** has been modified with a tool that allows you to change the year and month being viewed.



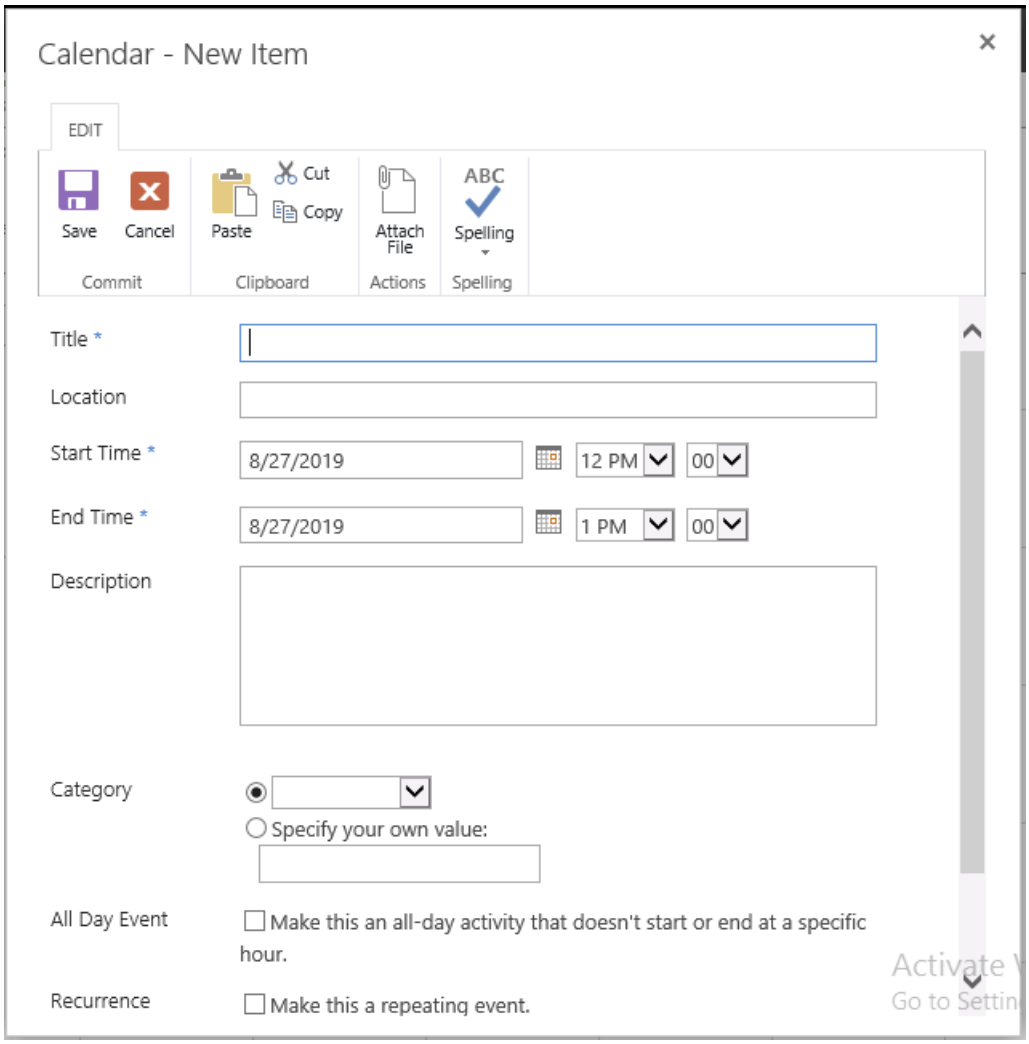
   C. Click the **Events** tab to get the calendar's toolbar to display.



   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.



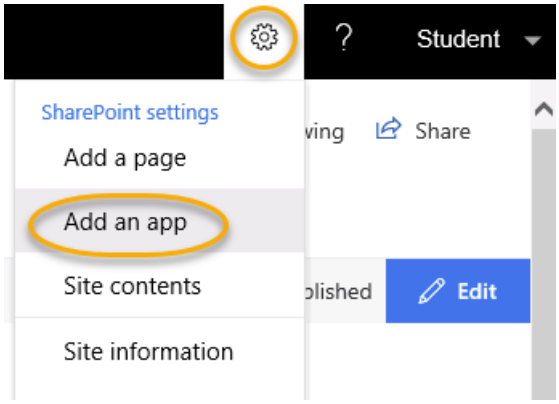
F. Click the **Save** button once you have finished filling out the form.

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

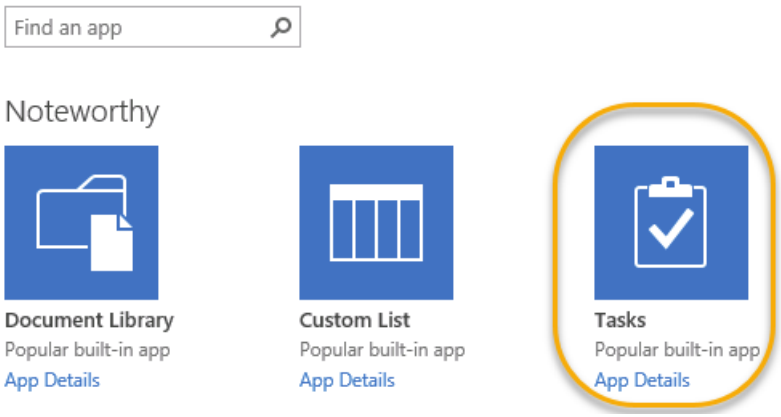
H. Feel free to experiment by creating additional events in the calendar.

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.

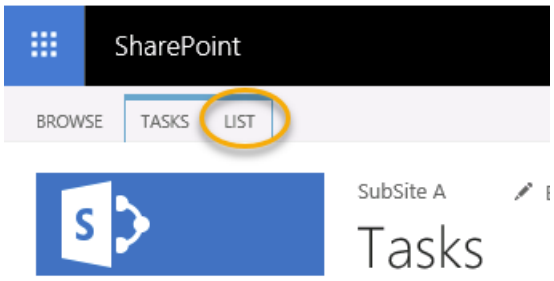


C. Enter “Tasks” in the **Name** field and then click the **Create** button.

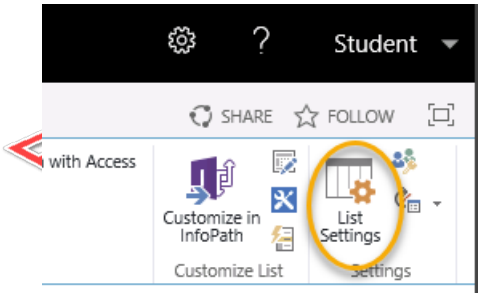
5. Add a permanent link to **Tasks** in the **Quick Launch** menu.

A. Click the **Tasks** link under the **Recent** heading in the **Quick Launch** menu. You may need to click **Site Contents**, then **Tasks**.

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



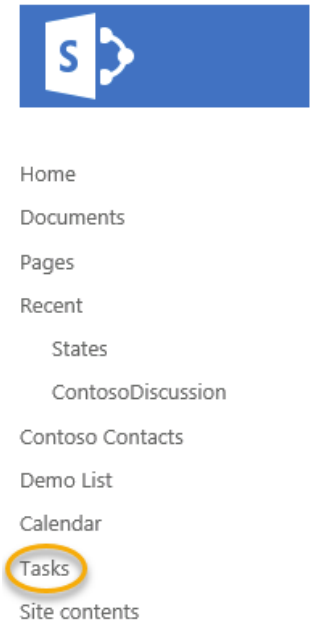
C. Click the **List Settings** link button on the **List** tab toolbar.



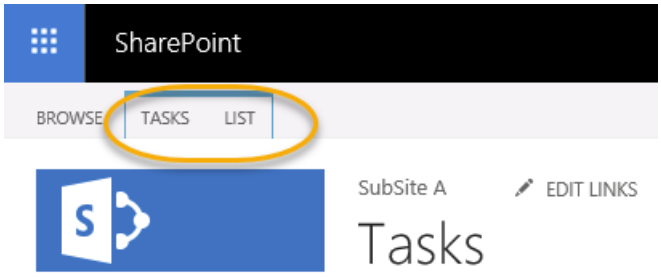
D. Click the **List name, description and navigation** link on the list settings page.

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

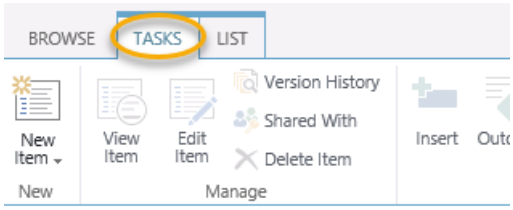
F. Note that **Tasks** now shows on the site's **Quick Launch** menu as a root-level item.



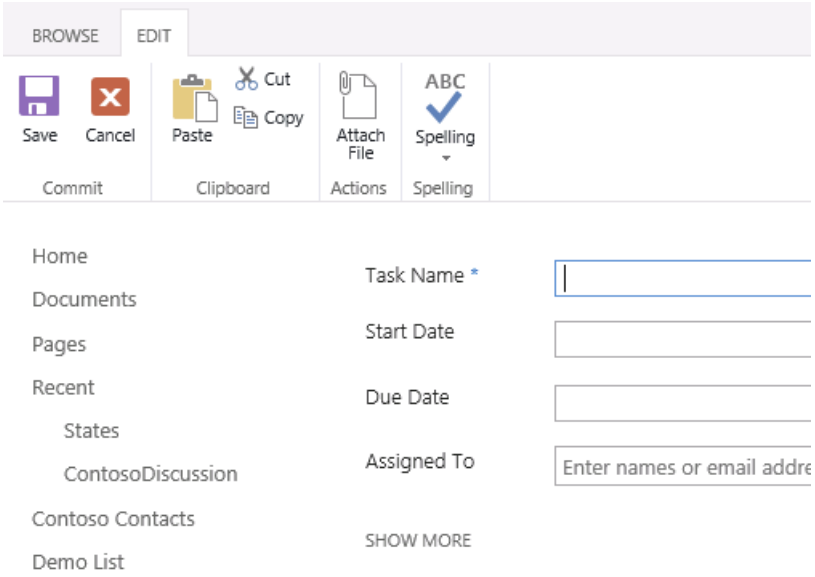
6. Create a new Task.
   A. Click the **Tasks** link within the **Quick Launch** menu. This should take you to a view of the tasks list.
   B. Note how this tasks list view has added a couple of new tabs to the top of the page next to the **Browse** tab.



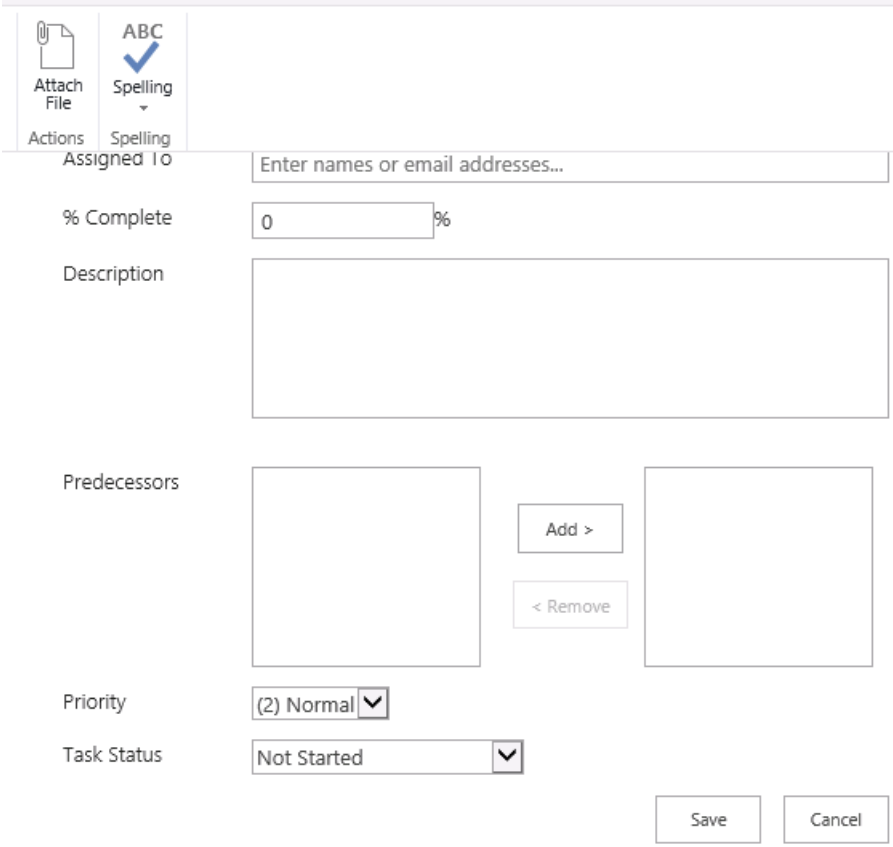
   C. Click the **Tasks** tab to get the task list's toolbar to display.



   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.

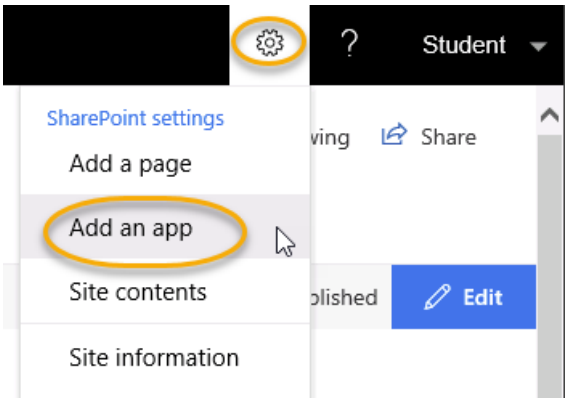
H. Verify that the Task list displays with the new task you created. Feel free to experiment by creating additional tasks in the Tasks list.

Exercise 6: Create Custom Lists and Columns

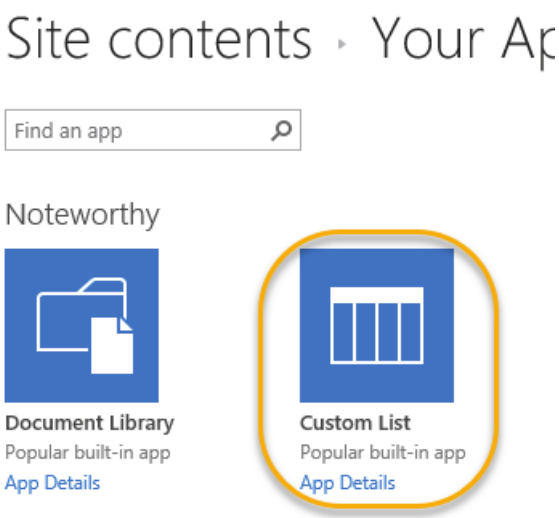
15 to 25 minutes

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.

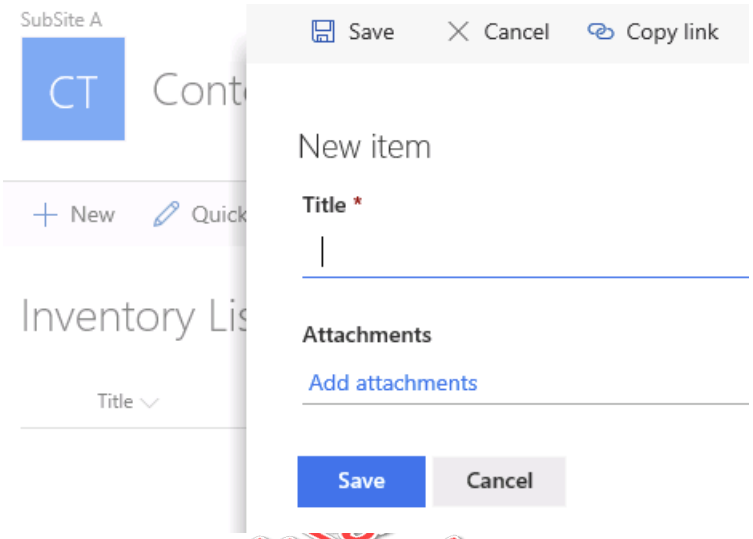


   C. Enter “Inventory List” in the **Name** field and then click the **Create** button.

2. Add custom columns to the new **Inventory List** list.

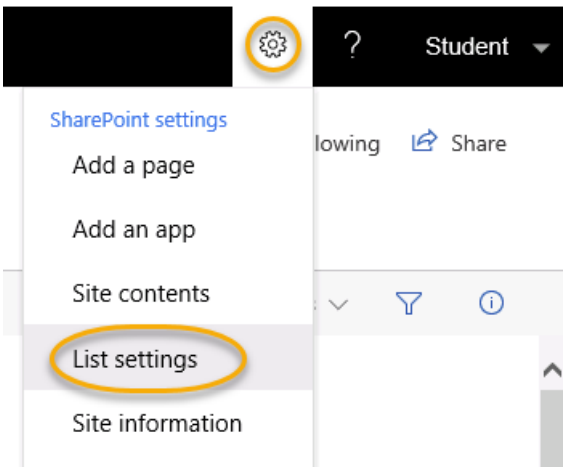
   A. Click the **Inventory List** list from the **Quick Launch** menu if it is not already selected. You may need to click **Site Contents** first, then **Inventory List**.

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

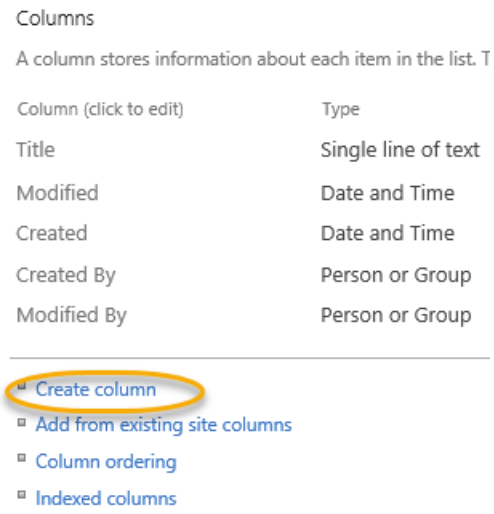


   C. Do **not** enter anything at this time; just verify that the only field is the required **Title** field. Click the **Cancel** button to close the dialog form without creating a new list item.

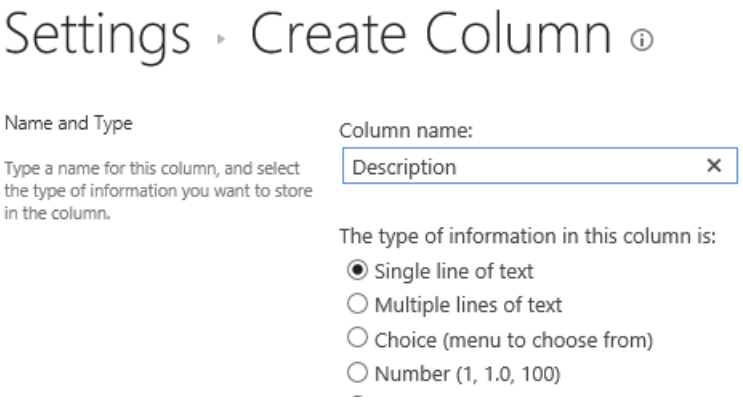
   D. Click the **List** tab to open the lists toolbar if you are using the classic view. If you are using the modern view: click **Settings**, then **List Settings**.



   E. Click the **Create Column** link in the **Columns** section.



F. Enter "Description" 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
Qty	Number
Price	Currency

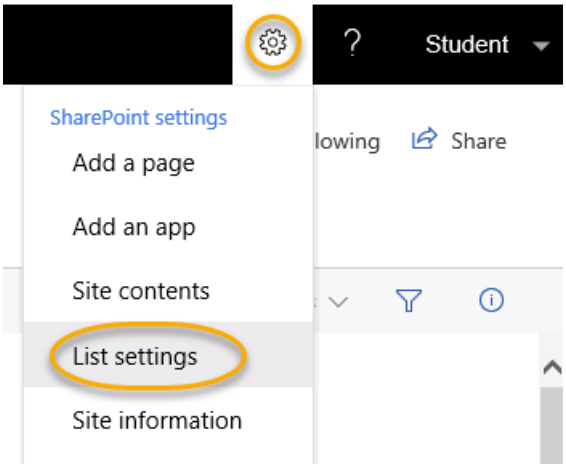
I. Keep the default column settings for the new **Qty** and **Price** columns based on their data types. Take a moment to note that the different data types

have different additional settings. For example, the **Currency** data type has a currency format selection.

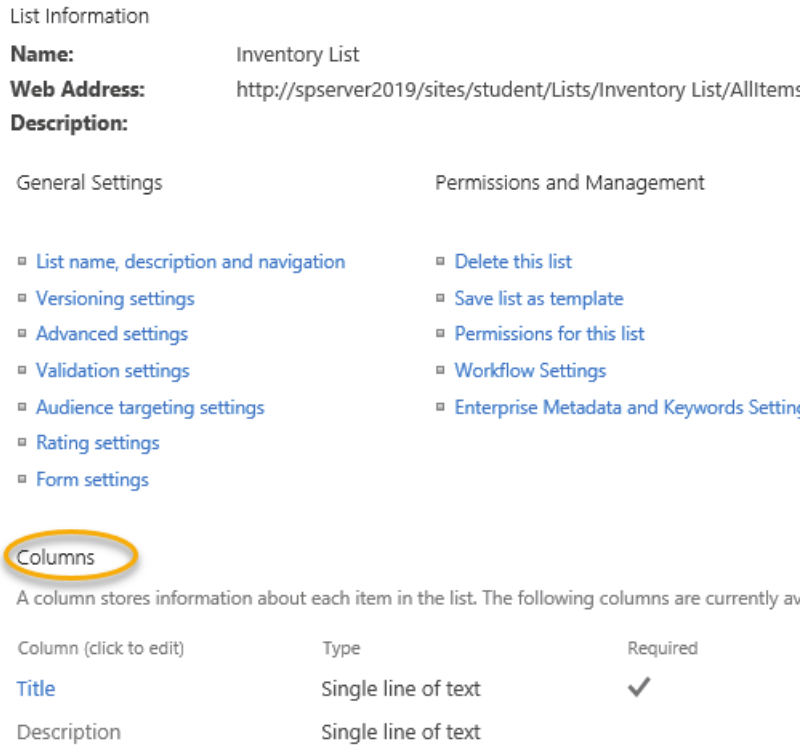
3. Rename the existing **Title** column in the **Inventory List** list to **Item Name**.

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

   B. Click the **List** tab to open the lists toolbar if you are using the classic view. If you are using the modern view: click **Settings**, then **List Settings**.



   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**.

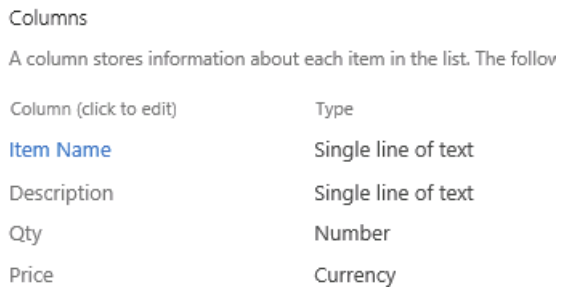


D. Click the **Title** column link to bring up the column settings page. Note how using this page you can change various settings of the column based on the data type of the column.

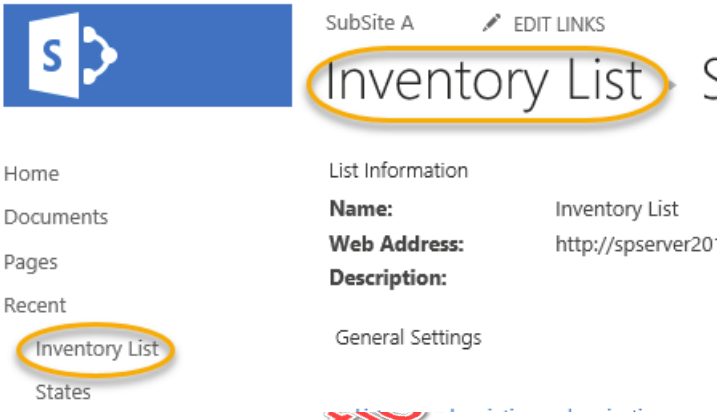
E. To rename this column, type over the text in the **Column name** field with the text "Item Name".

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 **Item Name** in the column group.

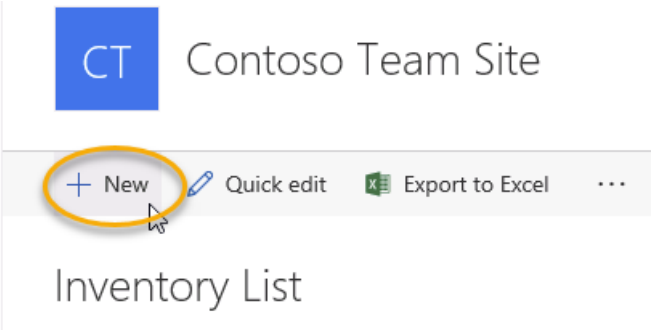


H. Click the **Inventory List** link in either the **Quick Launch** or the Site's Breadcrumbs to navigate back to the browse view of the **Inventory List** list.

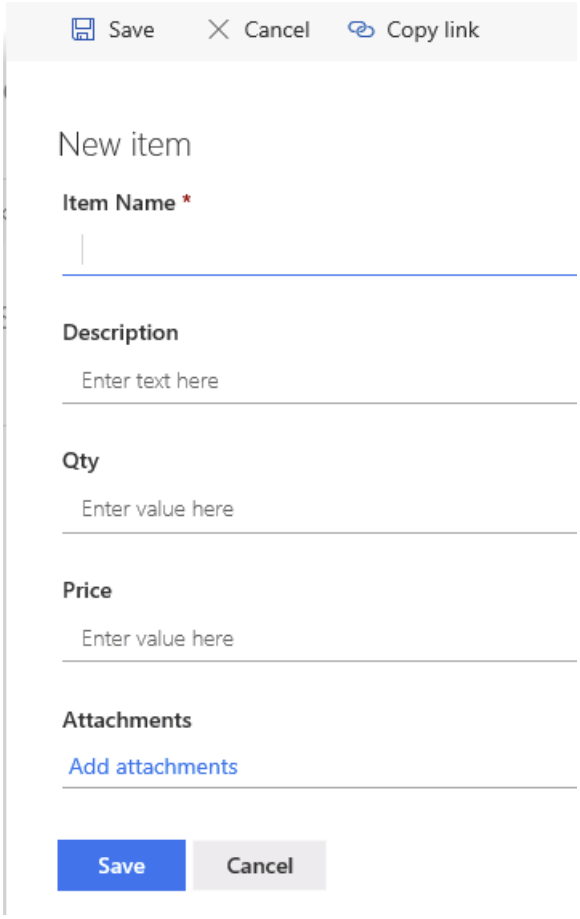


4. Add some new **Inventory Items** to the custom list.

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



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

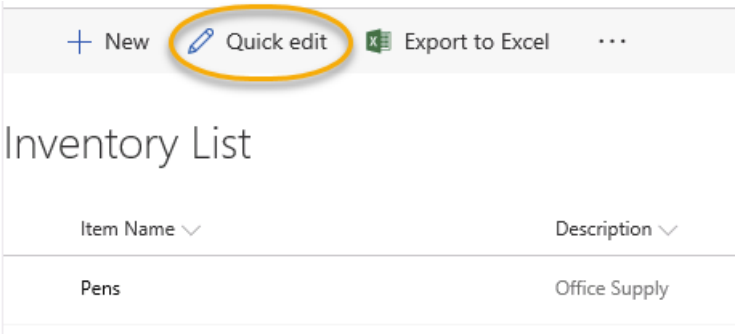


C. Enter the following values for new Inventory List items and click the **Save** button to save the data back to the list.

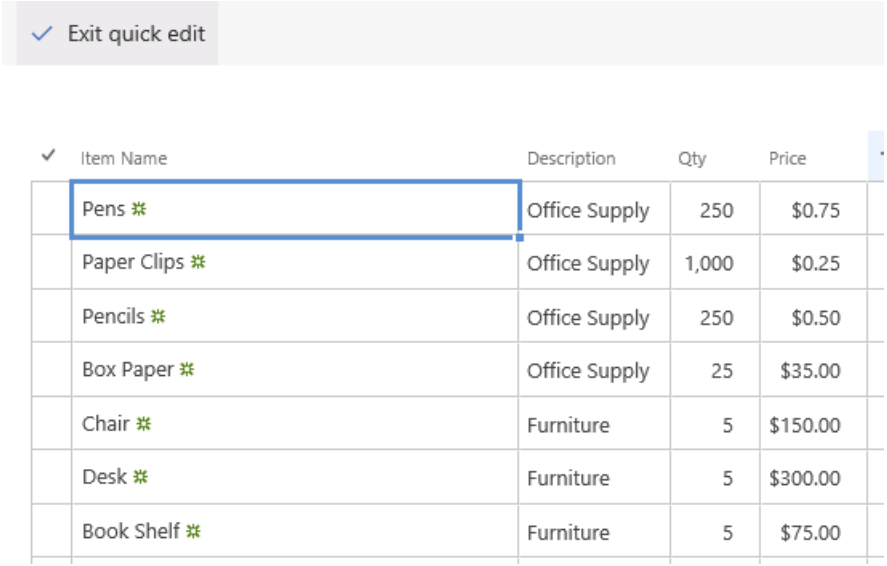
Item Name	Description	Qty	Price
Pens	Office Supply	250	.75

D. To add multiple items to the new **Inventory List** 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 inventory items as well.

Item Name	Description	Qty	Price
Paper Clips	Office Supply	1,000	.25
Pencils	Office Supply	250	.50
Box Paper	Office Supply	25	35
Chair	Furniture	5	150
Desk	Furniture	5	300
Book Shelf	Furniture	5	75



E. Compare your list to the following image:



It should look the same or similar depending on whether you used your own “inventory items” 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 **Exit quick edit** 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.

LESSON 4
Office Integration

Topics Covered

☑ Creating a list from an Excel spreadsheet.

☑ Creating an alert in Outlook.

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.

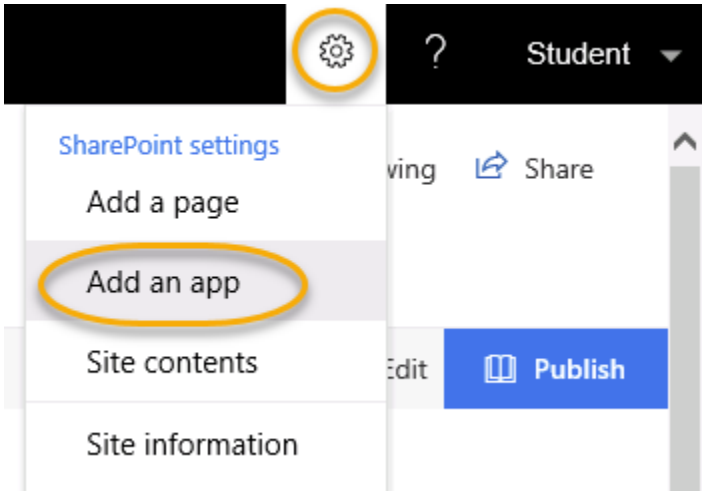
Note that this chapter is exploring integration with Office locally installed on the machine connecting to SharePoint. Office Online Server is a browser based version of Office that allows you to create and modify office documents. With SharePoint 2019 Office Online Server can be integrated and is considered 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.

4.1. Excel Integration

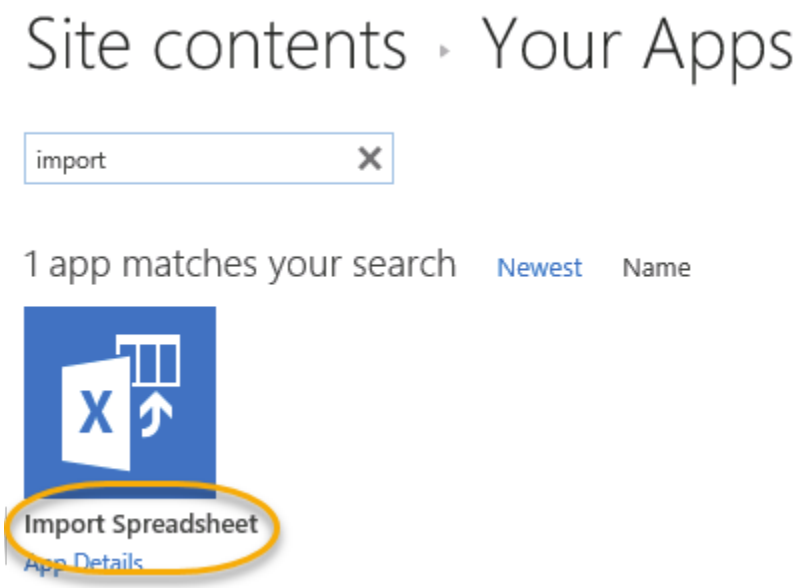
❖ 4.1.1. Import Excel Spreadsheet to List

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.



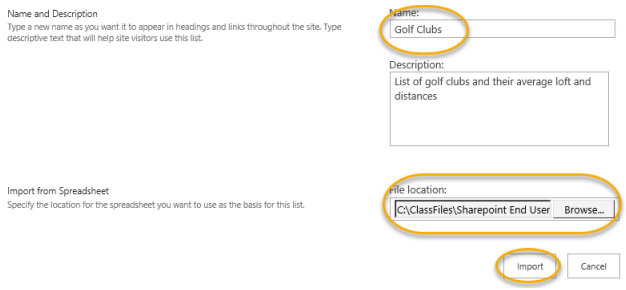
B. Locate the **Import Spreadsheet** App template and click the link.



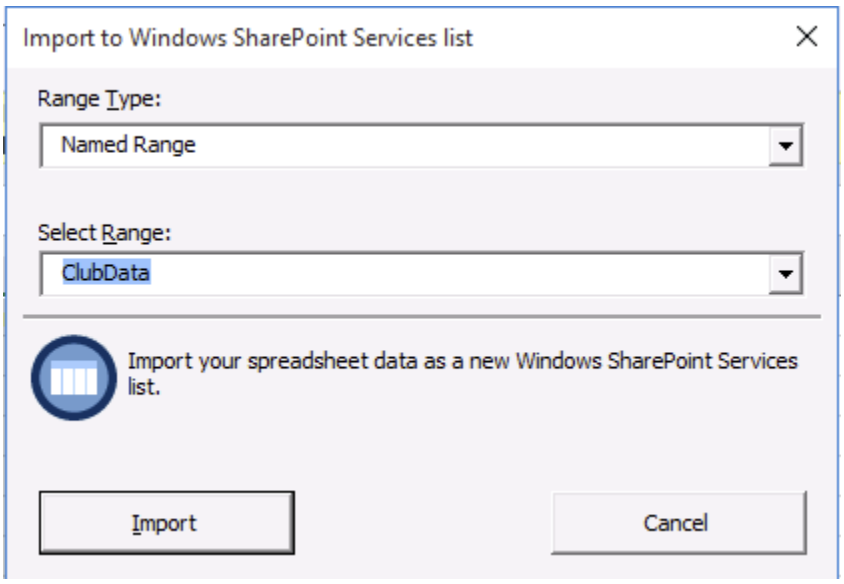
C. In the new list form that opens enter `Golf Clubs` in the **Name** field and `List of golf clubs and their average loft angle and distances` in the **Description** field.

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. In the **Range Type** drop-down, select **Named Range** and in the **Select Range** drop-down field choose **ClubData** from the list.



Note

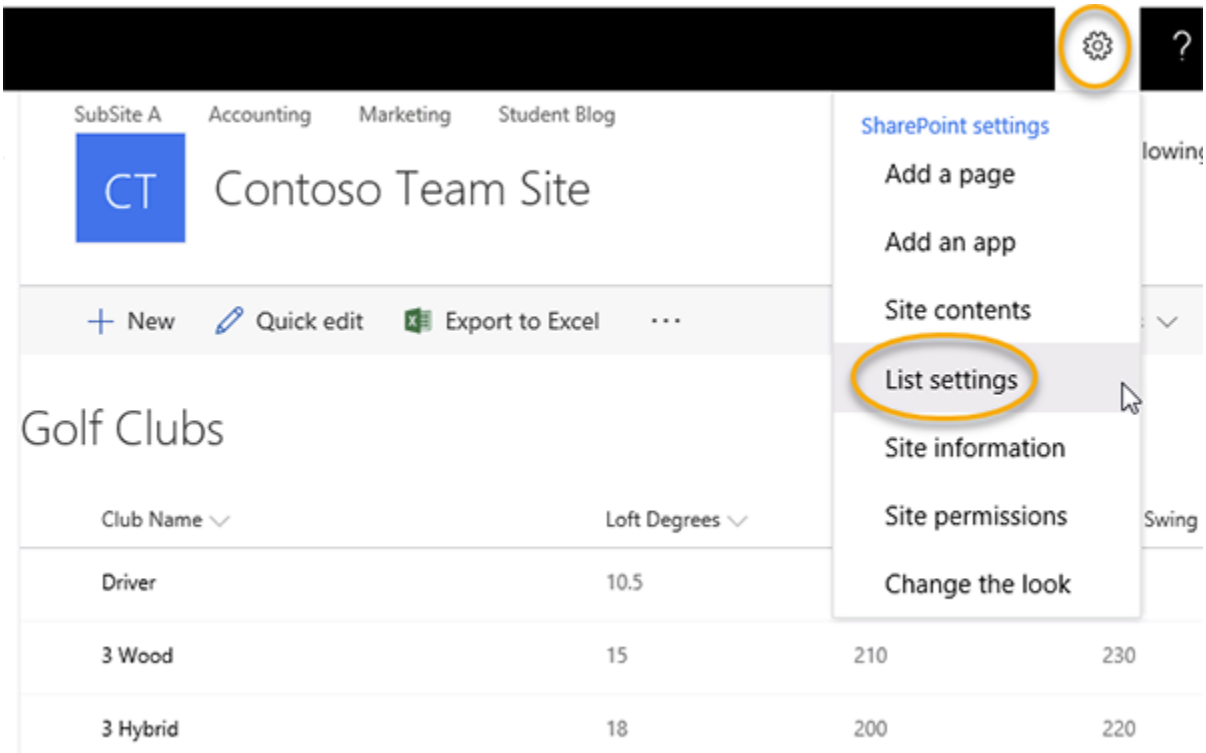
Optionally you could choose **Range of Cells** from the **Range Type** field. This would then allow you to use your mouse to click and drag across your spreadsheet selecting the range of cells to import. Having a named table as you do in this example makes it a bit easier to just select the table.

G. Click the **Import** button to complete the import process.

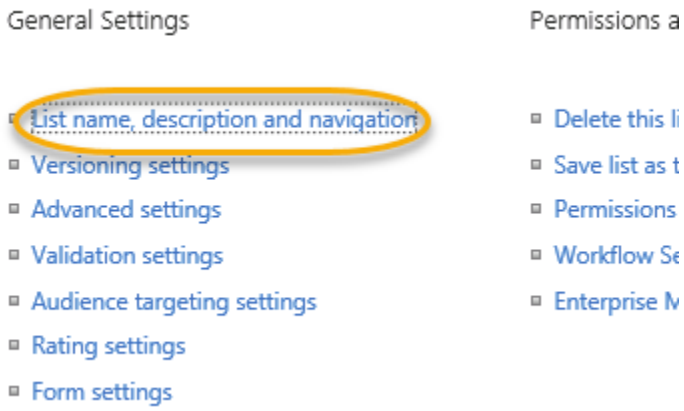
2. Add the new imported list to the **Quick Launch** menu.

   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 **Settings** them **List Settings**.

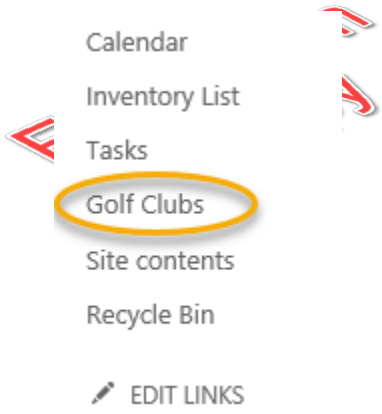


   C. Click the **List name, description and navigation** link under the **General Settings** group on the **List Settings** page.



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.



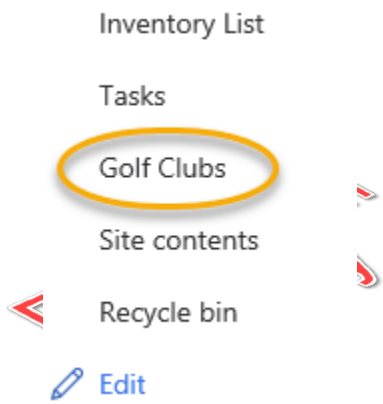
Note

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.**

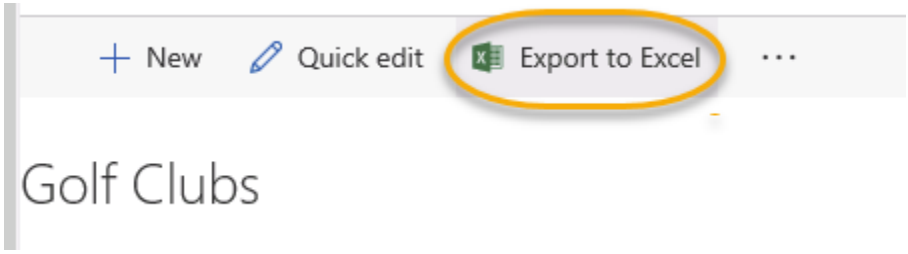
❖ 4.1.2. Export List Data to Excel

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.

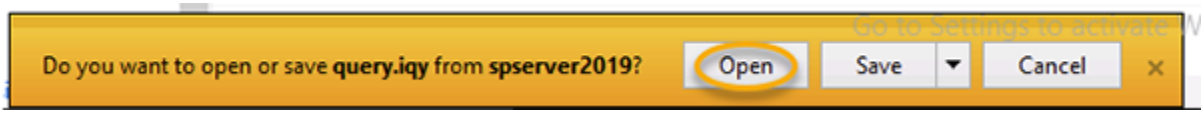
1. Export the **Golf Clubs** list to Microsoft Excel.
   A. Open your browser if it is not already open and navigate to your root team site.
   B. Click the **Golf Clubs** link in the **Quick Launch** menu to navigate to the list.



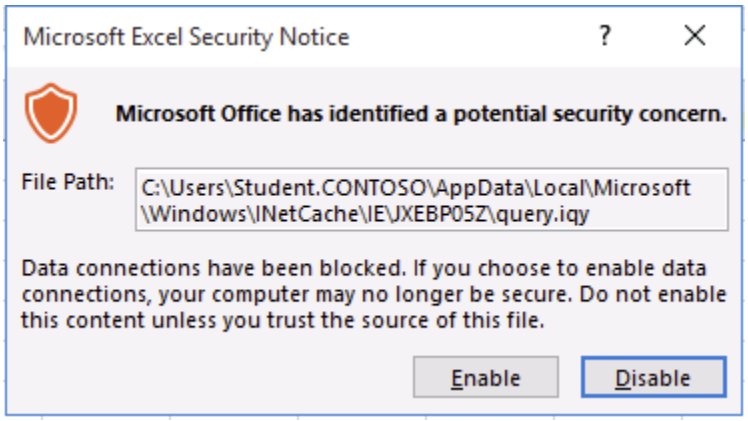
   C. Click the **Export to Excel**.



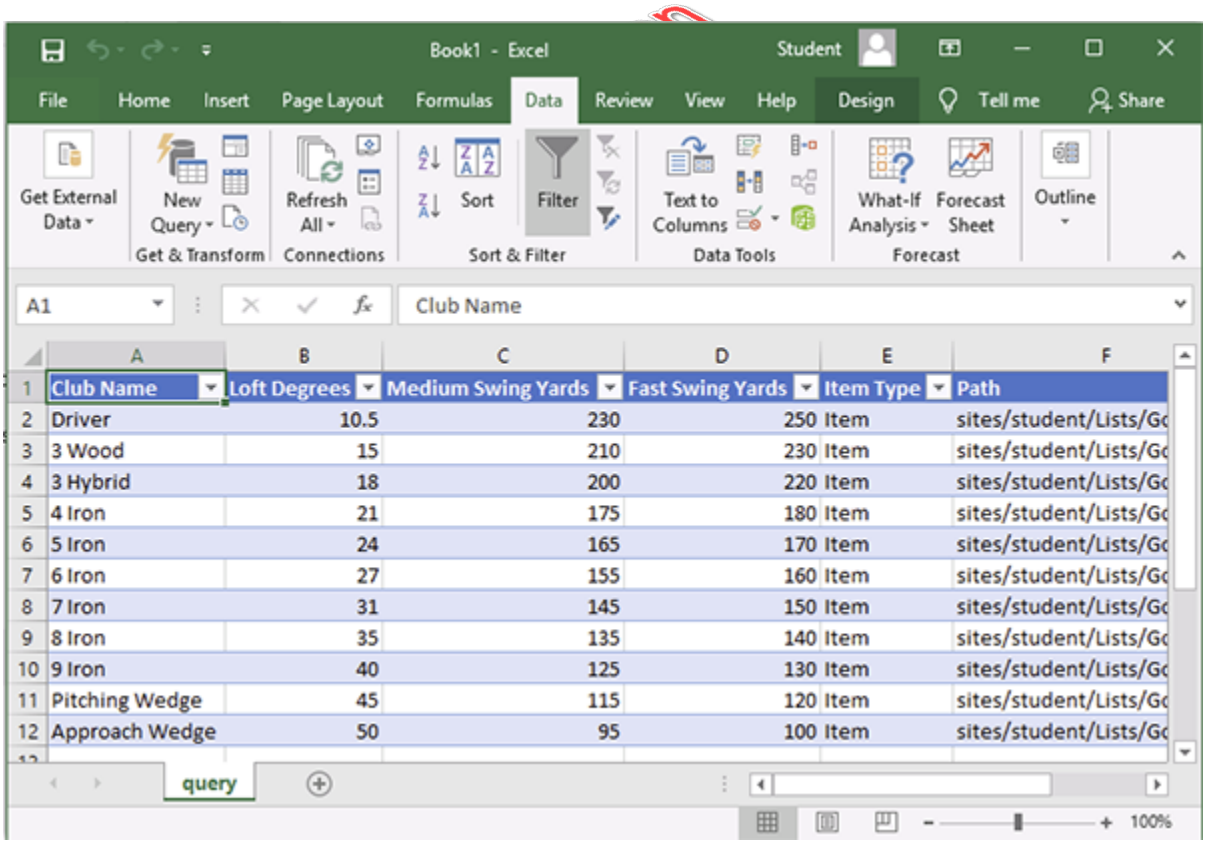
   D. In the **Open or Save** dialog, click the **Open** button to open the `owssvr.iqy` file.



E. Click the **Enable** button on the **Microsoft Excel Security Notice** dialog window to enable the data connection back to the SharePoint server.

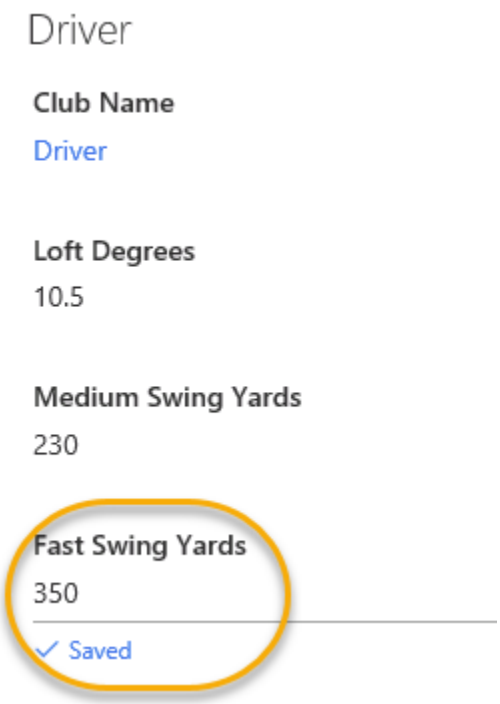


F. Microsoft Excel will open with the **Golf Clubs** list data in a linked spreadsheet. Note that the link is one way. You can only get updates from the SharePoint server, and any changes you make to the spreadsheet data do not sync back to the list in the site.

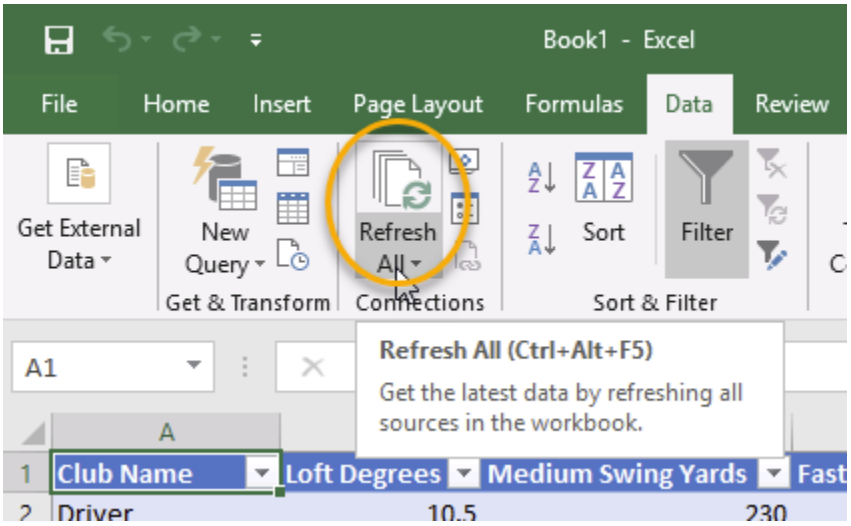


	Club Name	Loft Degrees	Medium Swing Yards	Fast Swing Yards	Item Type	Path
2	Driver	10.5	230	250	Item	sites/student/Lists/Gc
3	3 Wood	15	210	230	Item	sites/student/Lists/Gc
4	3 Hybrid	18	200	220	Item	sites/student/Lists/Gc
5	4 Iron	21	175	180	Item	sites/student/Lists/Gc
6	5 Iron	24	165	170	Item	sites/student/Lists/Gc
7	6 Iron	27	155	160	Item	sites/student/Lists/Gc
8	7 Iron	31	145	150	Item	sites/student/Lists/Gc
9	8 Iron	35	135	140	Item	sites/student/Lists/Gc
10	9 Iron	40	125	130	Item	sites/student/Lists/Gc
11	Pitching Wedge	45	115	120	Item	sites/student/Lists/Gc
12	Approach Wedge	50	95	100	Item	sites/student/Lists/Gc

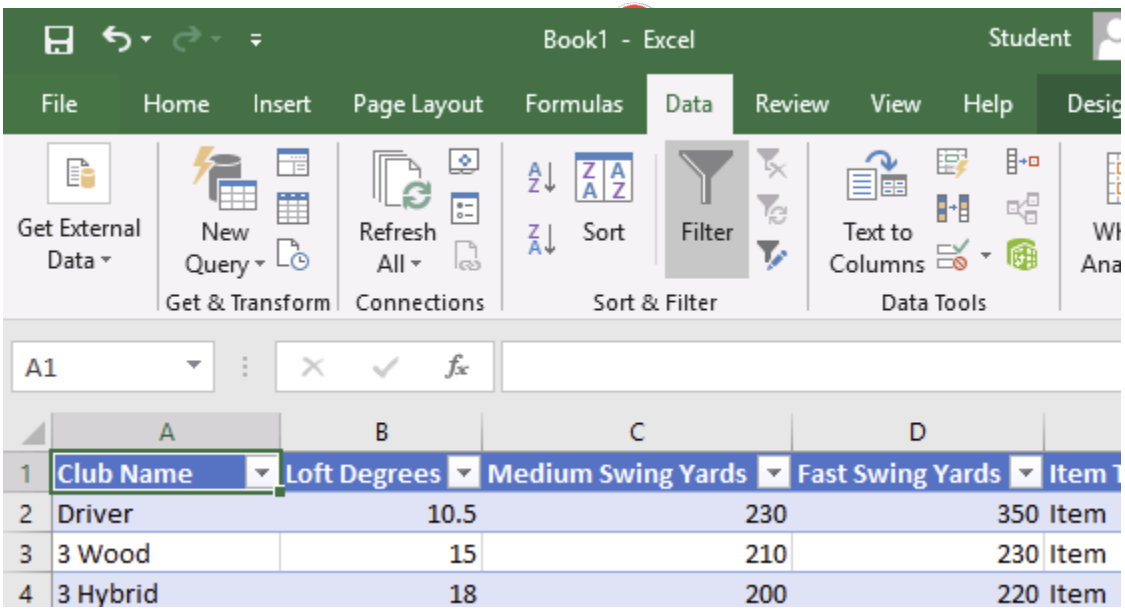
2. Update the **Golf Clubs** list data and sync the updates to the linked Excel spreadsheet.
   A. Go back to your browser window with the **Golf Clubs** list **All Items** view showing.
   B. Click the **Driver** link to open the item's properties form.
   C. Change the **Fast Swing Yards** field of the **Driver** to "350" and the changes are saved.



   D. Click back in your Excel window to bring the it back to the foreground.
   E. Click the **DATA** tab in Excel to open the toolbar. Click the **Refresh All** button in the **Connections** region of the **Data** tab toolbar.



F. The Excel spreadsheet and chart should now reflect the changes we made to the list.



G. Close Microsoft Excel and click **Don't Save** when asked if you want to save the changes to 'Book1'.

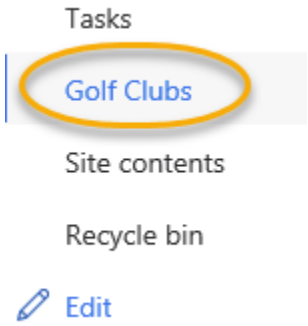
4.2. Outlook Integration

❖ 4.2.1. Create an Alert

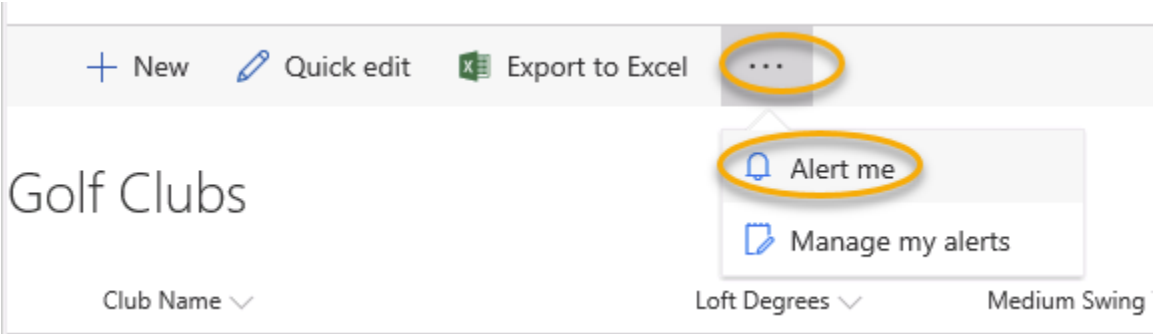
This walk-through will show you how to create an alert in the **Golf Clubs** list to notify you when the list is changed. The demonstration requires that you have done the earlier demonstration that created the **Golf Clubs** list.

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.



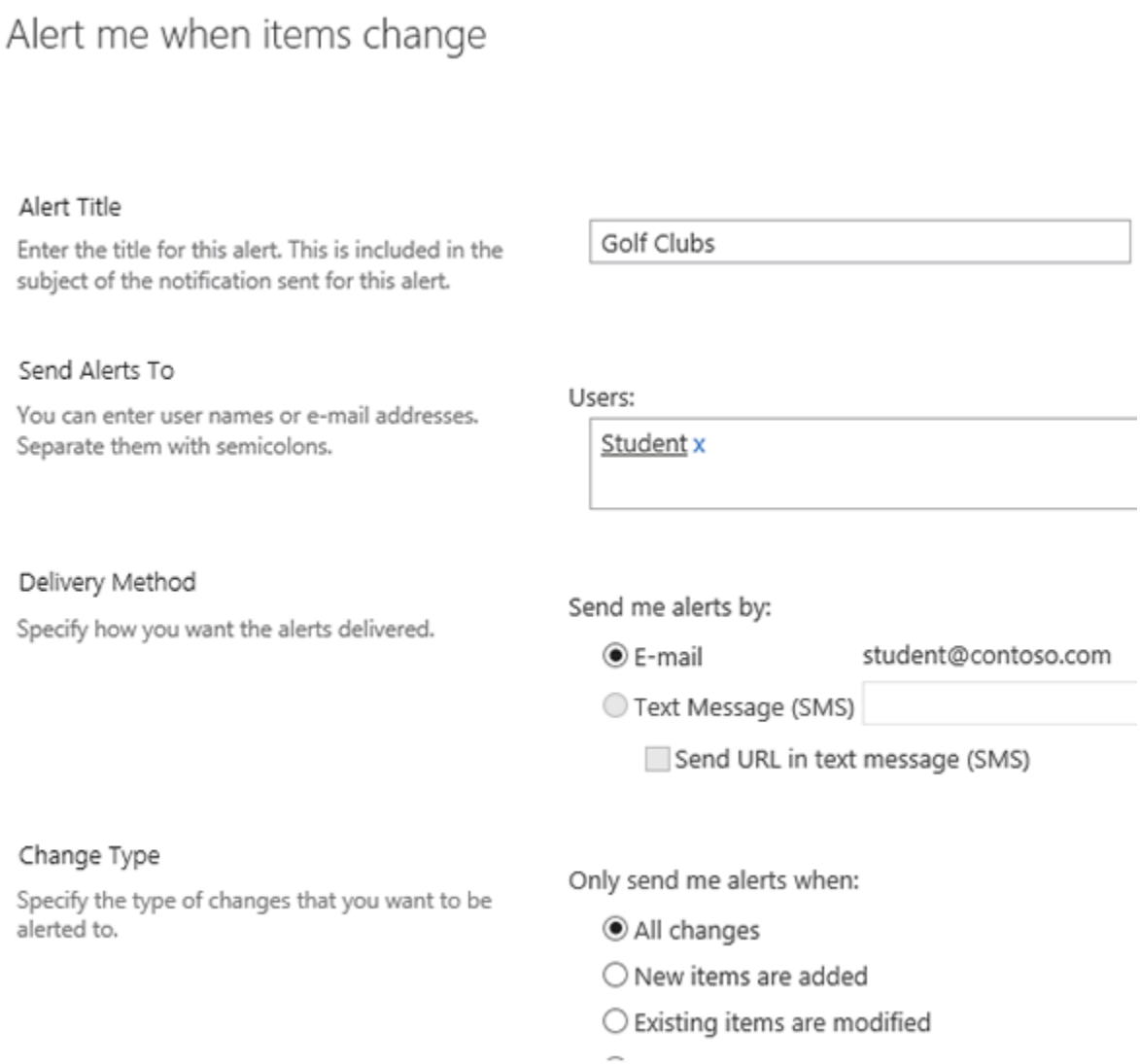
   C. Click the **Alert Me** button in the toolbar.



Note

The **Alert Me** button only displays if the Farm administrator has configured the server with an outgoing mail server address.

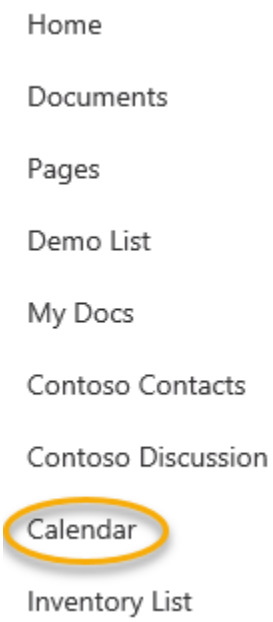
D. Leave all the default options in the **Golf Clubs - New Alert** dialog form and click the **OK** button to save the new alert.



❖ 4.2.2. Connect to Outlook

This walk-through will show you how to connect a list 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 **Calendar** list that was created in a previous walk-through.

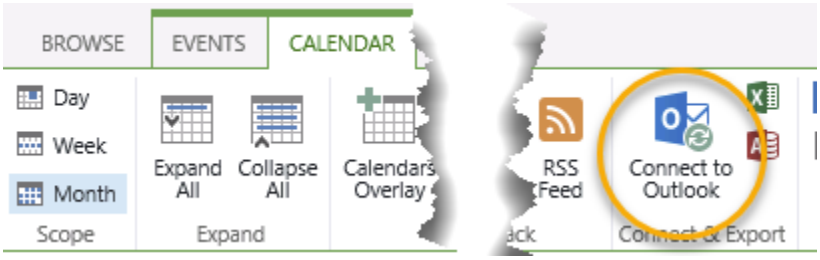
1. Connect the **Calendar** list to Outlook.
    A. Click the **Calendar** list on the root site's **Quick Launch** menu.



Note

If **Calendar** 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.

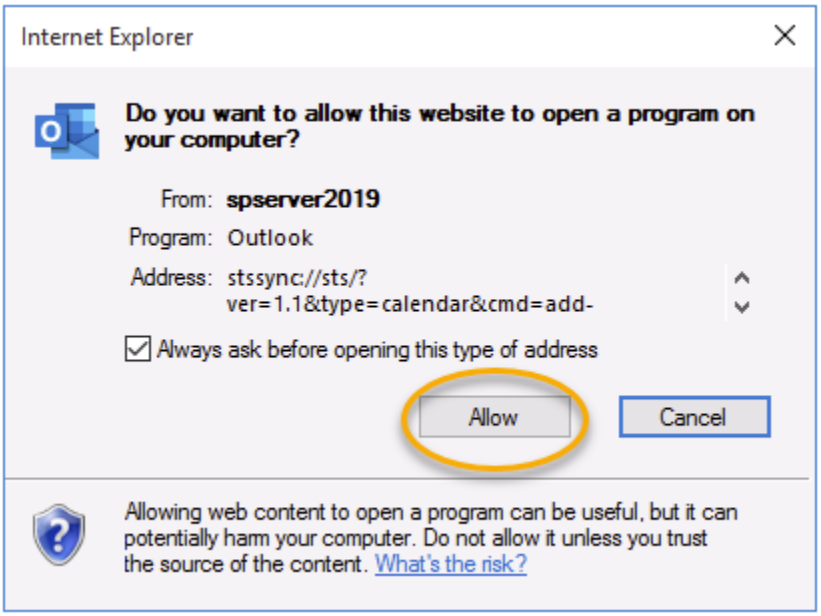
B. Click the **Connect to Outlook** icon in the **Connect & Export** region on the **Calendar** tab toolbar.



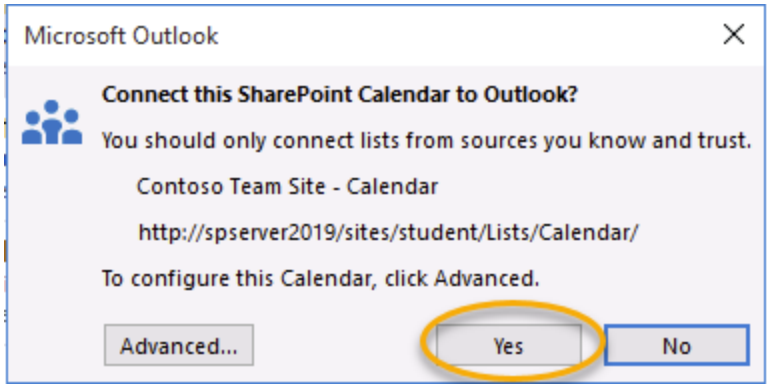
Note

Depending on the width of your browser screen, you may or may not see the label text “Connect to Outlook”.

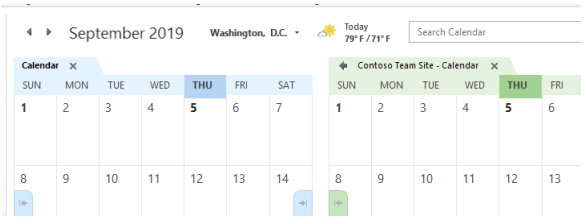
C. In the **Internet Explorer** dialog window that asks, **Do you want to allow this website to open a program on your computer?**, click the **Allow** button.



D. In the **Microsoft Outlook** dialog window that asks, "Connect this SharePoint Document Library to Outlook?", click the **Yes** button.



E. The **Calendar** will be added to your Outlook side by side.

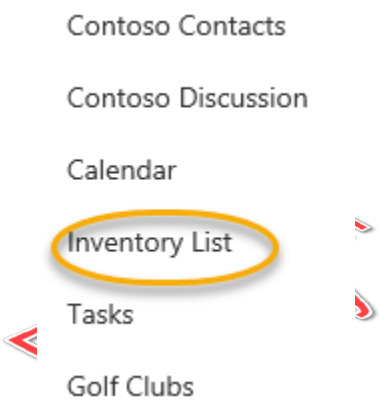


Exercise 7: Excel Integration

15 to 25 minutes

In this exercise, you will learn how to export a SharePoint list to Microsoft Excel.

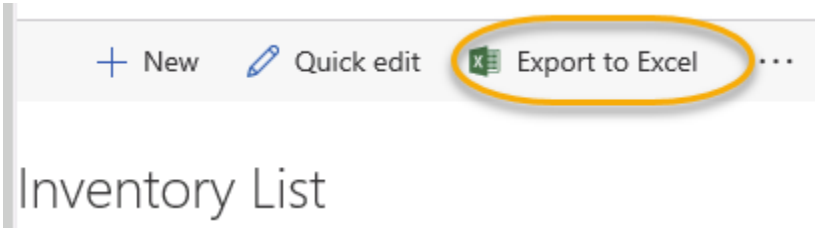
1. Export the **Inventory List** list to Microsoft Excel.
   A. Open your browser if it is not already open and navigate to your root team site.
   B. Click the **Inventory List** link in the **Quick Launch** menu to navigate to the list.



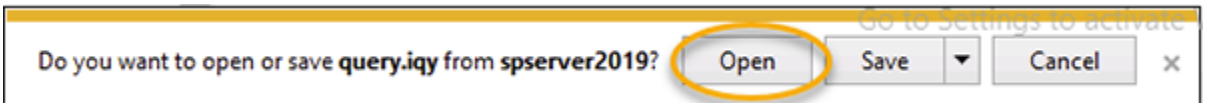
Note

If **Inventory List** 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.

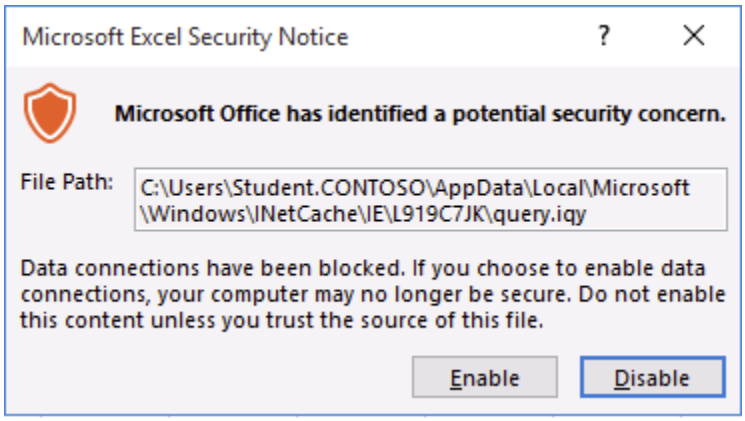
   C. Click the **Export to Excel** in the toolbar.



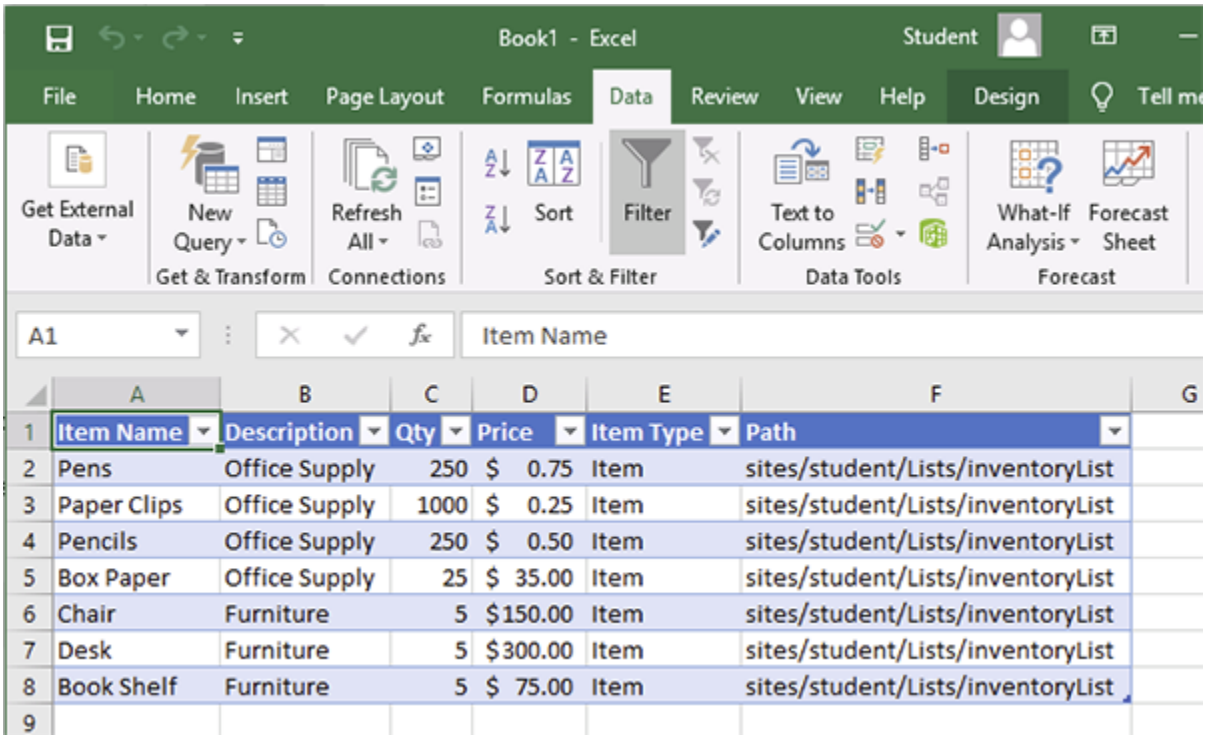
D. In the **Open or Save** dialog, click the **Open** button to open the `owssvr.iqy` file.



E. Click the **Enable** button on the **Microsoft Excel Security Notice** dialog window to enable the data connection back to the SharePoint server.

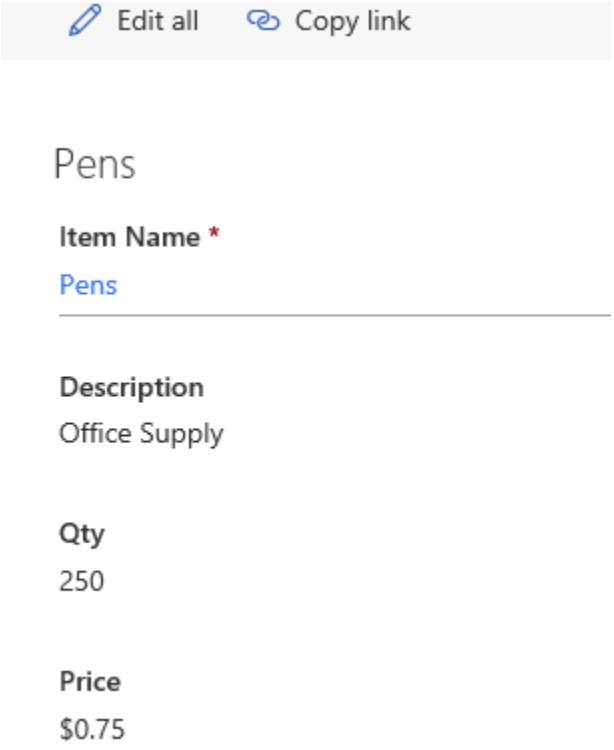


F. Microsoft Excel will open with the **Inventory List** list data in a linked spreadsheet. Note that the link is one way. You can only get updates from the SharePoint server; any changes you make to the spreadsheet data do not sync back to the list in the site.

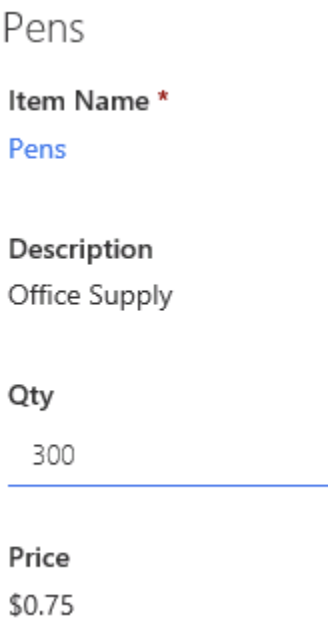


	A	B	C	D	E	F
1	Item Name	Description	Qty	Price	Item Type	Path
2	Pens	Office Supply	250	$ 0.75	Item	sites/student/Lists/inventoryList
3	Paper Clips	Office Supply	1000	$ 0.25	Item	sites/student/Lists/inventoryList
4	Pencils	Office Supply	250	$ 0.50	Item	sites/student/Lists/inventoryList
5	Box Paper	Office Supply	25	$ 35.00	Item	sites/student/Lists/inventoryList
6	Chair	Furniture	5	$150.00	Item	sites/student/Lists/inventoryList
7	Desk	Furniture	5	$300.00	Item	sites/student/Lists/inventoryList
8	Book Shelf	Furniture	5	$ 75.00	Item	sites/student/Lists/inventoryList
9						

2. Update the **Inventory List** list data and sync the updates to the linked Excel spreadsheet.
   A. Go back to your browser window with the **Inventory List** list **All Items** view showing.
   B. Click the **Pens** link to open the item's properties form.

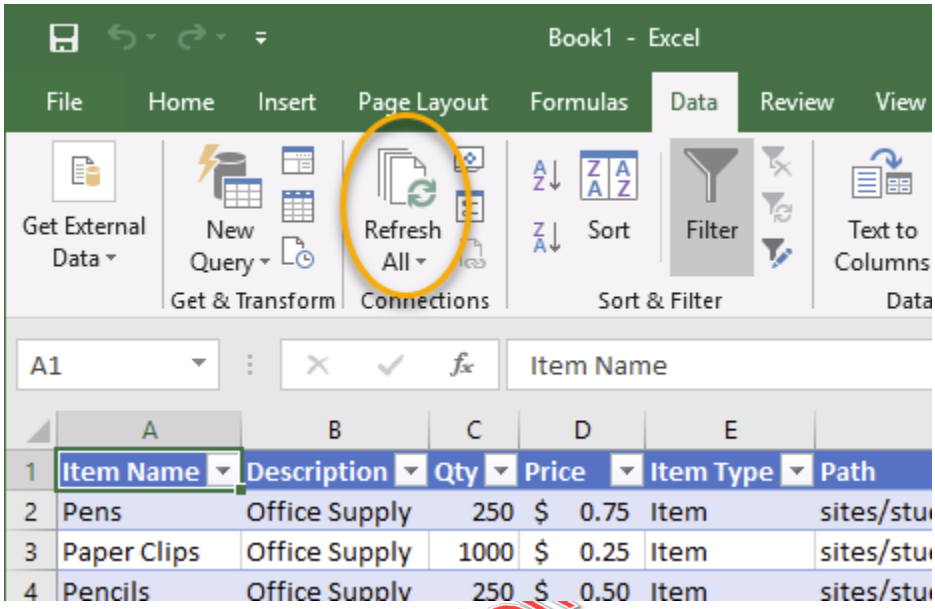


C. Change the **Qty** field of the **Pens** to "300" and press **Enter** to save your change.

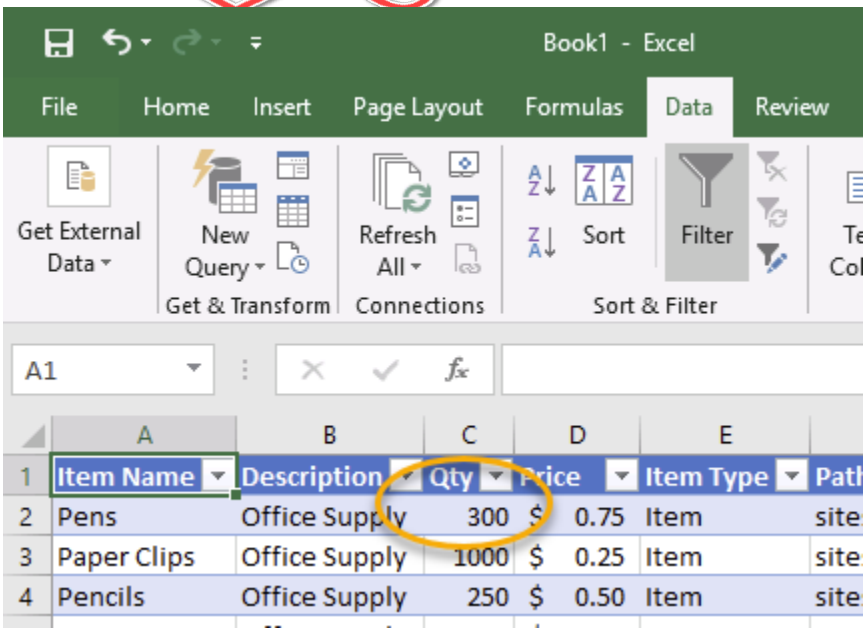


D. Click back in your Excel window to bring it back to the foreground.

E. Click the **DATA** tab in the Excel toolbar. Click the **Refresh All** button in the **Connections** region of the **DATA** tab toolbar.



F. The Excel spreadsheet and chart should now reflect the changes you made to the list.



G. Close Microsoft Excel and click **Don't Save** when asked if you want to save the changes to 'Book1'.

Exercise 8: Outlook Integration

15 to 25 minutes

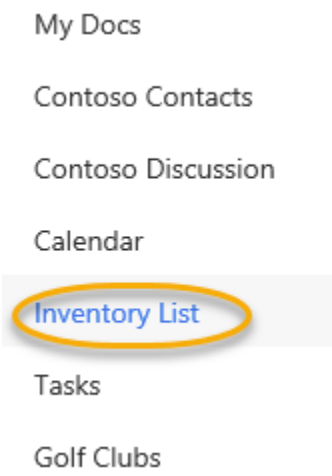
In this exercise, you will learn how to use Outlook with your SharePoint site.

1. Create an alert for the **Inventory List** list.

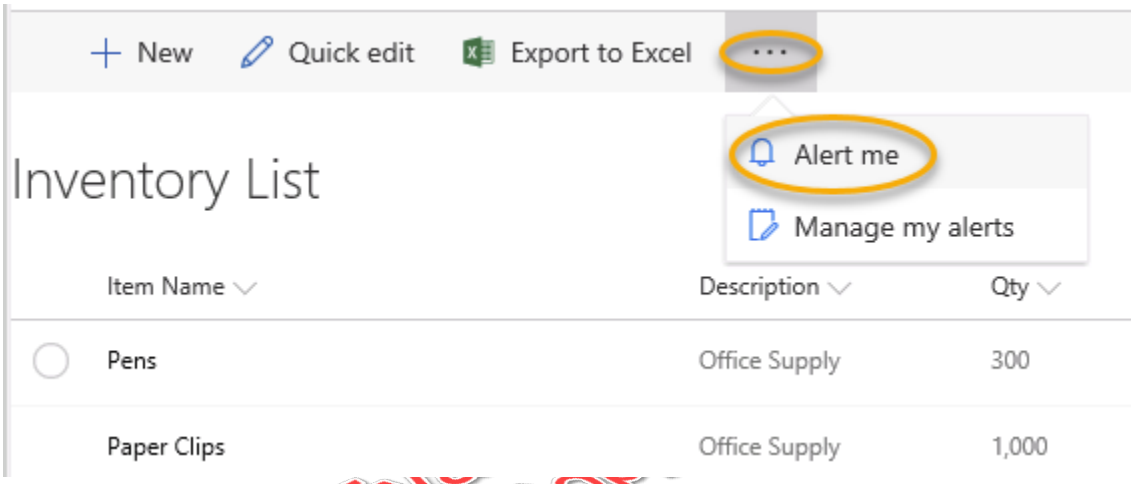
> **Note**
>
> This alert exercise will work only if your SharePoint server is configured with an email server it can deliver to and the account you are logged in with has a valid email address.

A. Open your browser if it is not already open and navigate to your root team site.

B. Click the **Inventory List** link in the **Quick Launch** menu to navigate to the list.



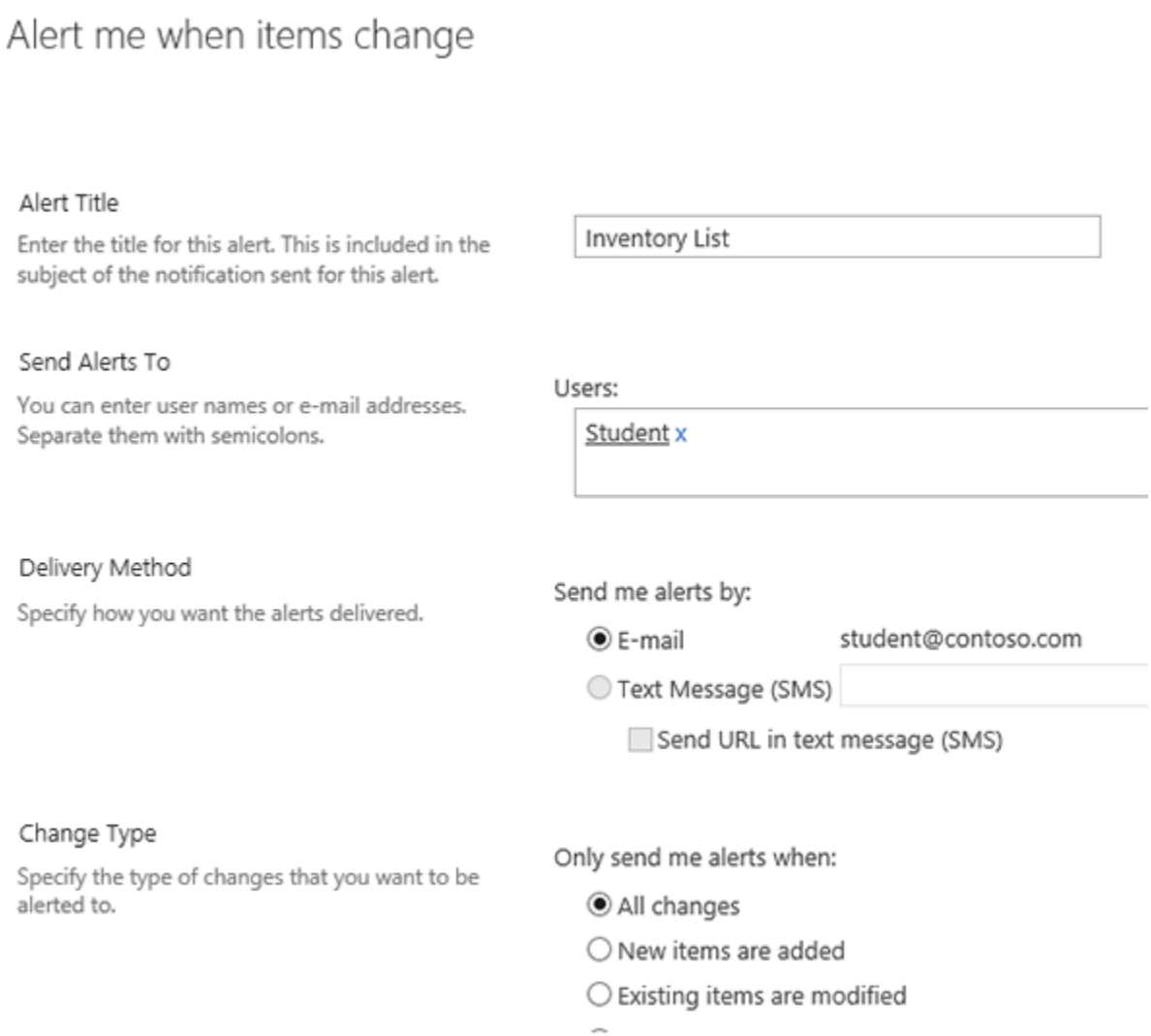
C. Click the **Alert Me** drop-down button in the toolbar and select the **Alert Me** option.



Note

The **Alert Me** button only displays if the Farm administrator has configured the server with an outgoing mail server address.

D. Leave all the default options in the **Inventory List - 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.



Conclusion

In this lesson, you have learned:

- How to create a list from and Excel spreadsheet.
- How to create an alert in Outlook.

LESSON 5

Working with Lists and Library Views

Topics Covered

☑ Default views built into lists and libraries.

☑ 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.

5.1. Default Views

❖ 5.1.1. 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 2019 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.

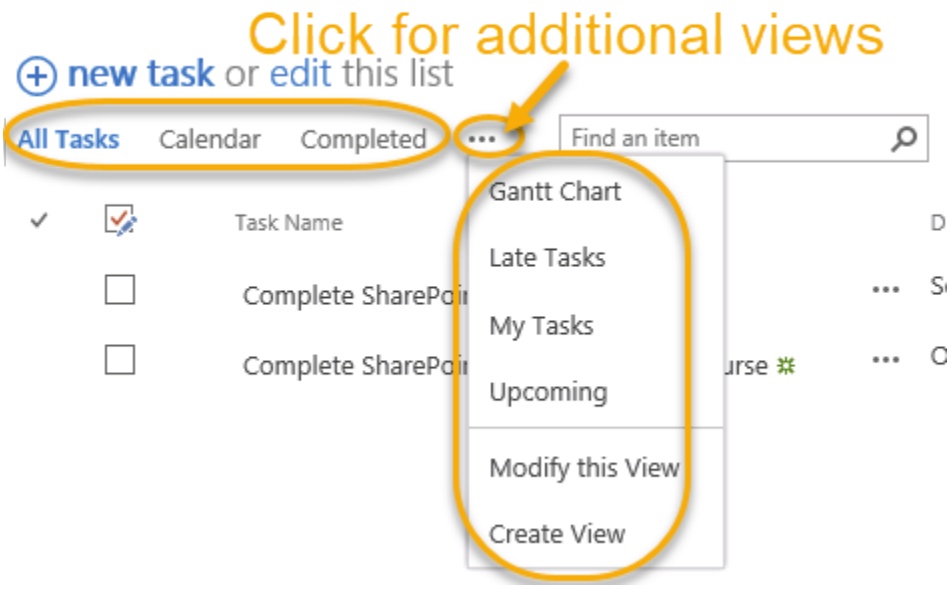
D. Repeat the previous two steps with the following information to create a second task item:

Task 2

Field	Data
Title:	Type “Complete SharePoint 2019 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.

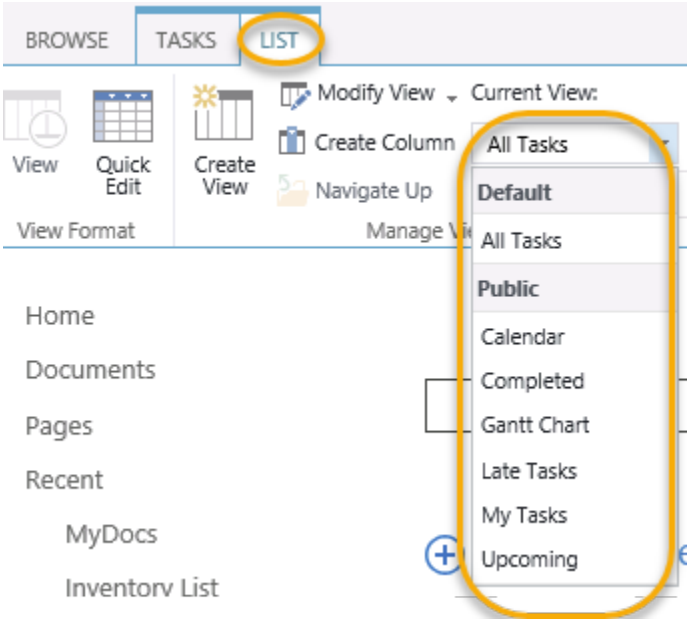
   A. Select the desired view from the links along the top of the list or additional views available by clicking the ellipsis button.



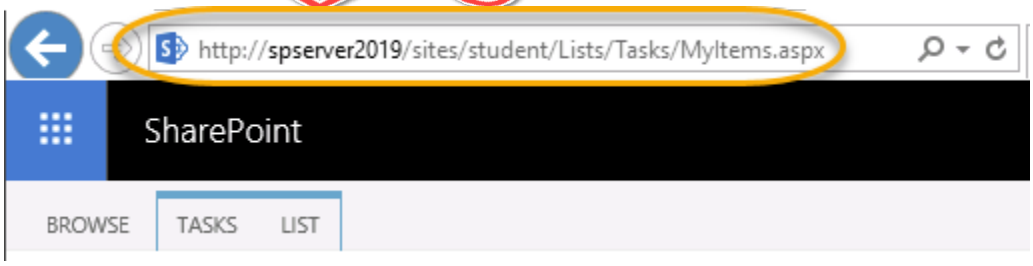
Note

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.

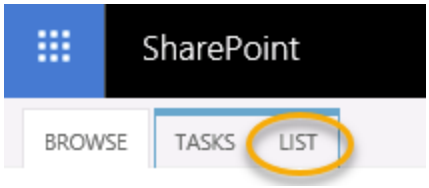


C. You can also type the URL path to a view since each view corresponds to a unique ASPX file. This can be useful if you want to create a link directly to a view. The following image shows the URL of the **My Tasks** view of the **Tasks** list.

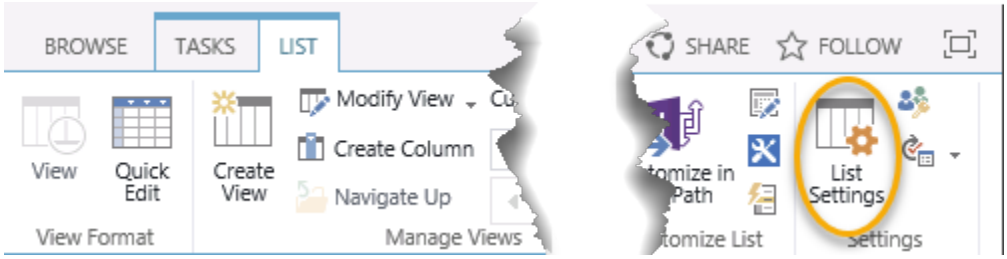


3. Manage the views for the **Tasks** list.

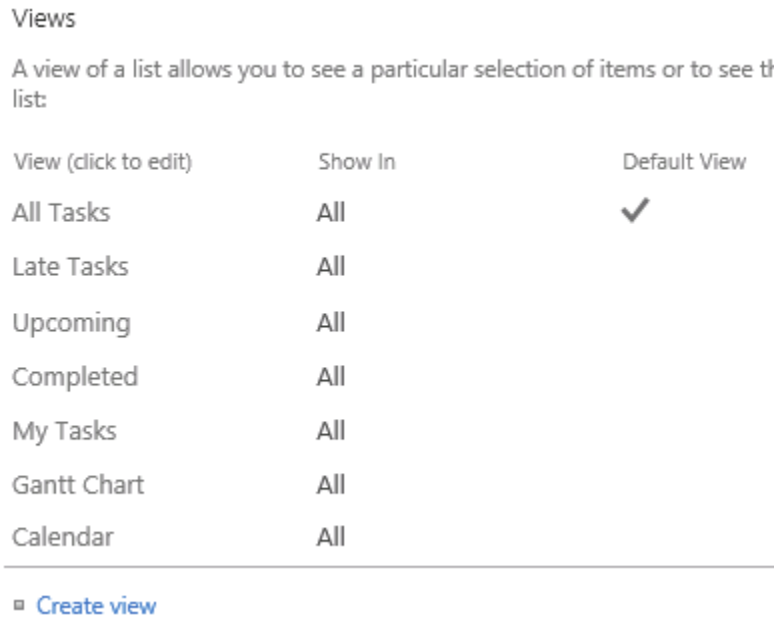
   A. Click the **List** tab for the **Tasks** list to open the toolbar.



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

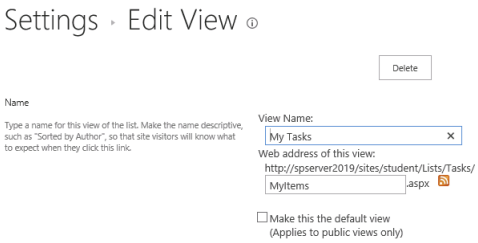


C. Scroll down the **List Settings** page and note the **Views** region.



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.

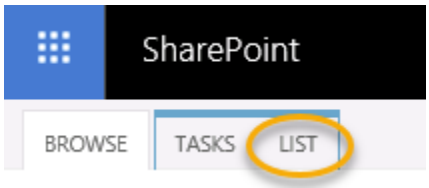
F. Click the **Cancel** button at the top of the page but also note the **Delete** button that can be used to delete a view if the user has sufficient permissions.

5.2. Custom Views

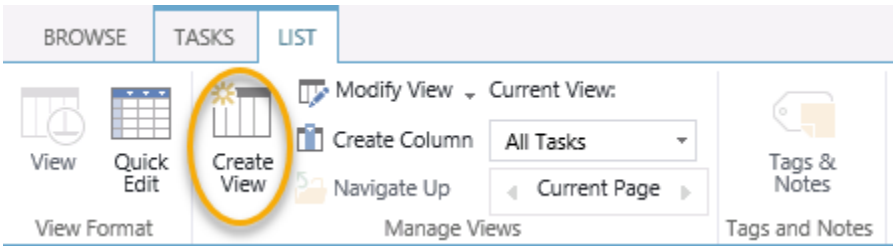
❖ 5.2.1. How to Create a Custom View

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

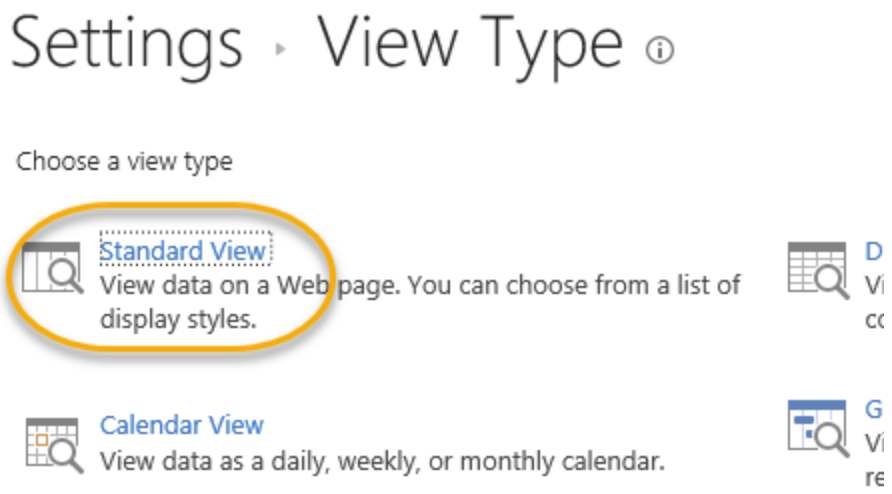
1. Create a custom view of **Tasks** using the **Standard View** format.
   A. Navigate to the **Tasks** list of the site by clicking the **Tasks** link in the **Quick Launch** menu.
   B. Click the **List** tab to open the toolbar.



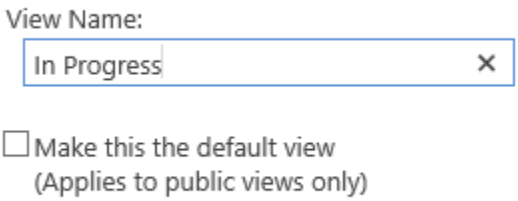
   C. Click the **Create View** button on the **List** tab toolbar.



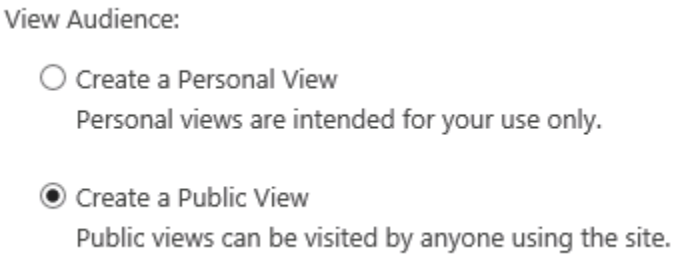
D. Click **Standard View** from the **Choose a view type** region.



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



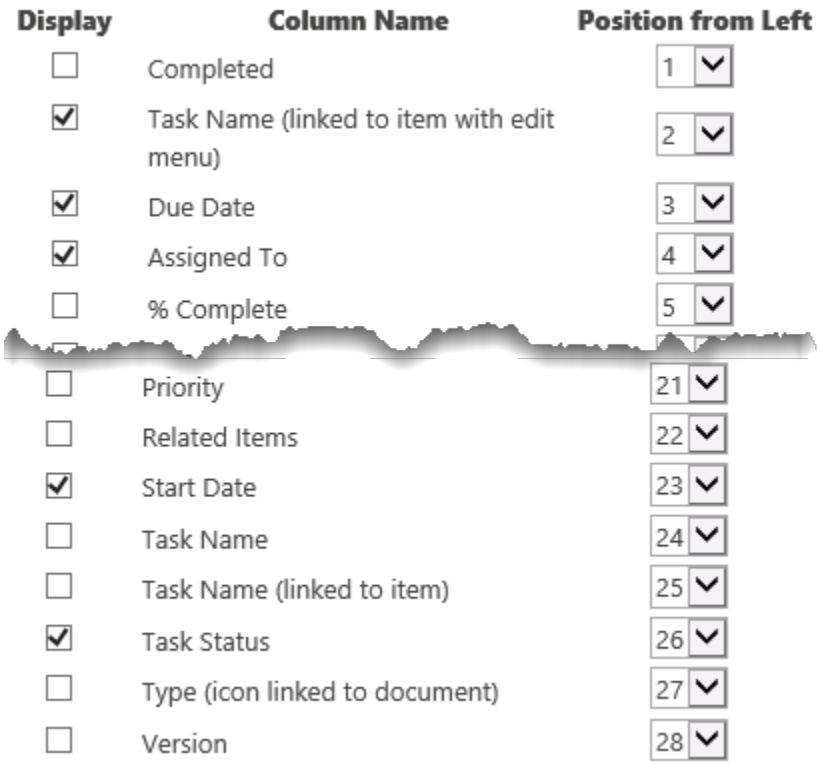
F. Leave the **Create a Public View** setting in the **Audience** region but note the option to **Create a Personal View**.



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.

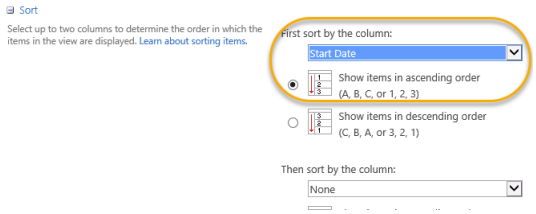
G. Select the following from the **Columns** region; everything else should be deselected.

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

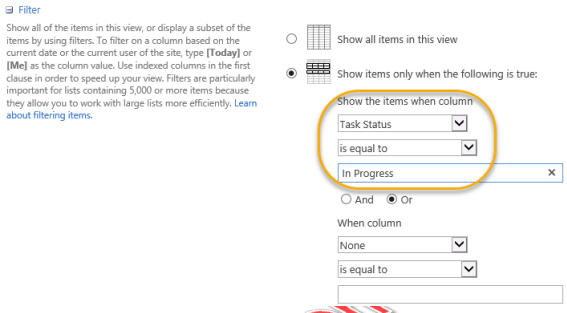


Display	Column Name	Position from Left
☐	Completed	1
☑	Task Name (linked to item with edit menu)	2
☑	Due Date	3
☑	Assigned To	4
☐	% Complete	5
☐	Priority	21
☐	Related Items	22
☑	Start Date	23
☐	Task Name	24
☐	Task Name (linked to item)	25
☑	Task Status	26
☐	Type (icon linked to document)	27
☐	Version	28

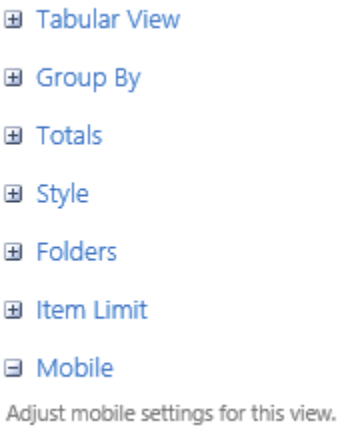
H. Select **Start Date** for the **First sort by the column** selection under the **Sort** region.



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.



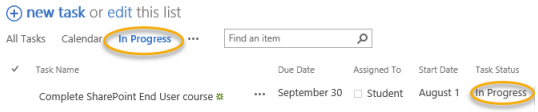
J. Note the remaining view options and their collapsed regions but leave them at their default settings.



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**



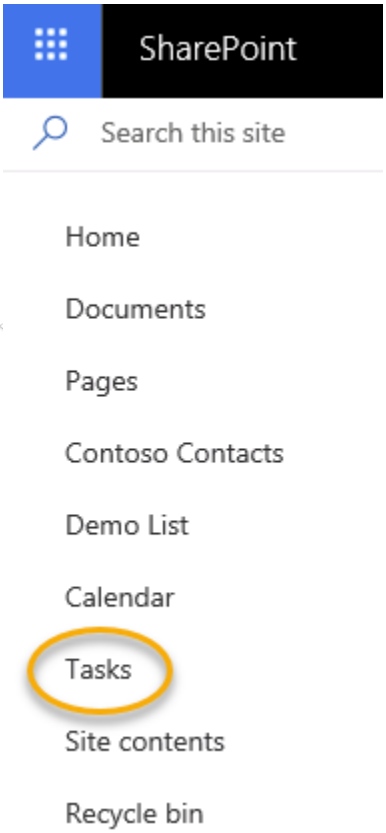
3. Click the **Tasks** link in the **Quick Launch** and note how the view is reset back to the default **All Tasks**. You could optionally set the custom view **In Progress** as the default view for the list.

Exercise 9: Working with Views

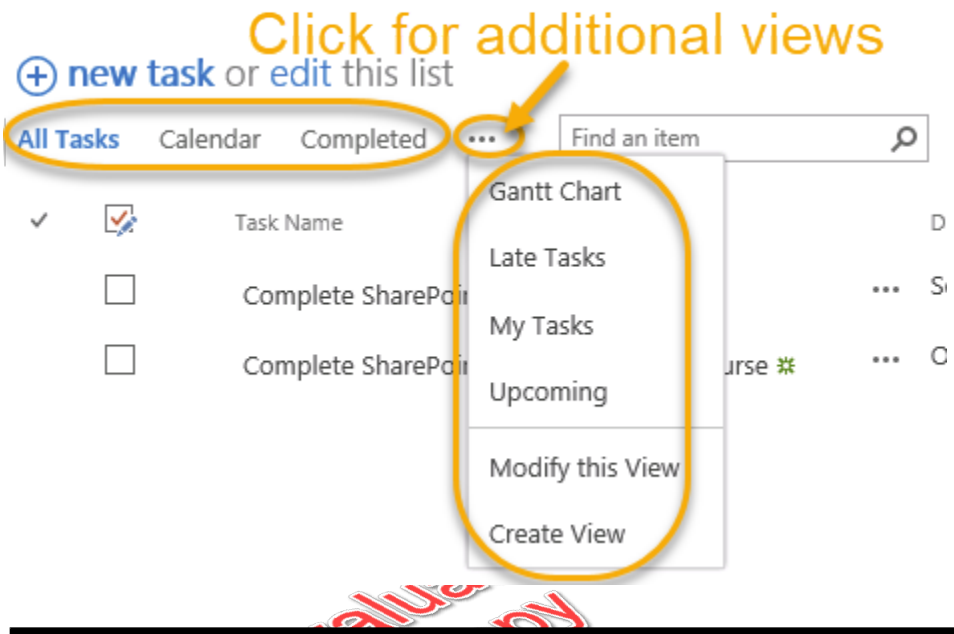
15 to 25 minutes

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

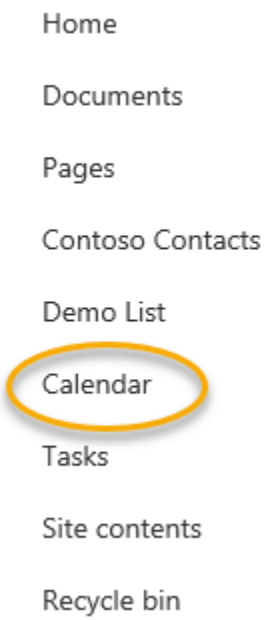
The views are security trimmed. This means that, if the account does not have permissions to create or modify a view, those options will not be listed.

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.

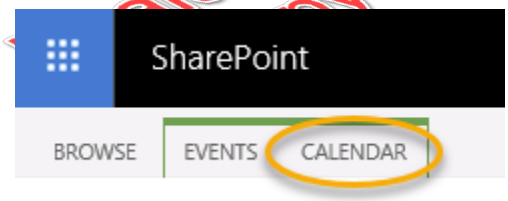
D. Take a few minutes to click each of the different views available in the **Tasks** list.

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

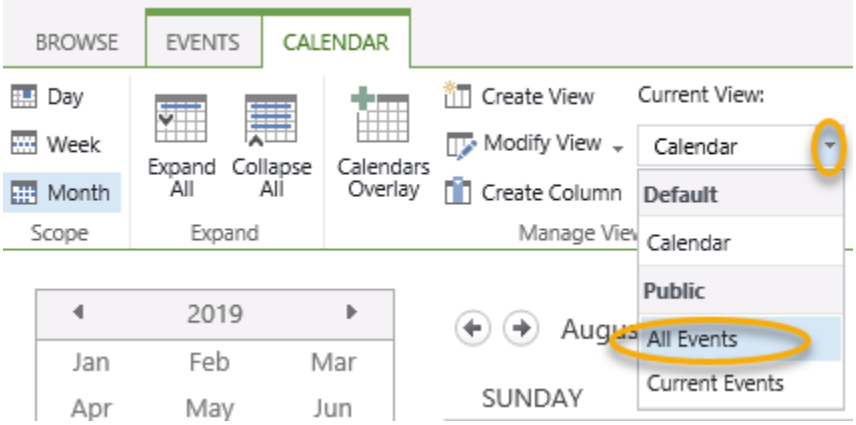
   A. Click the **Calendar** list link within the **Quick Launch** menu.



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.

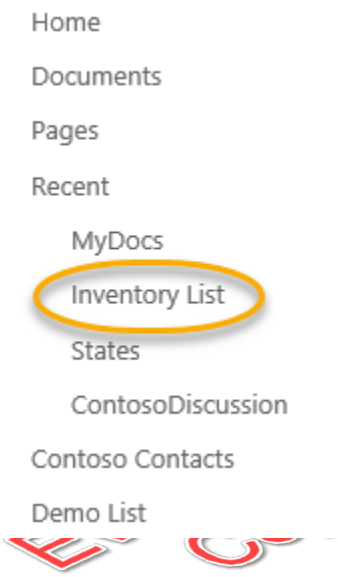


D. The **Calendar** list will now display all events in a more traditional list-like table view.

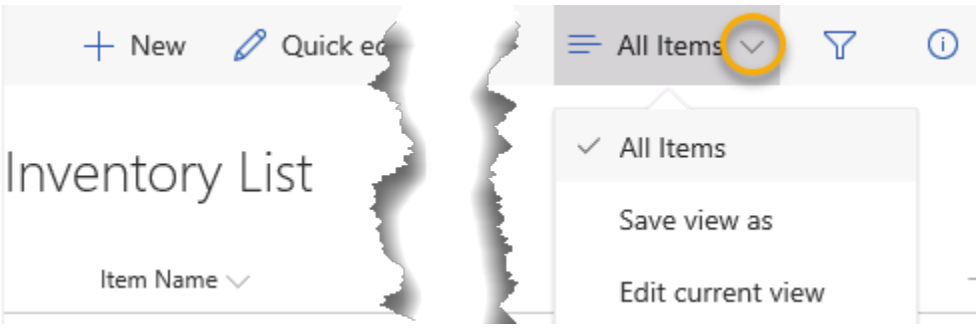
E. Take a few minutes to click each of the different views available in the **Calendar** list.

3. Explore the default view of the custom **Inventory List** list.

A. Click the **Inventory List** list link within the **Quick Launch** menu.



B. Click the **ellipsis/drop-down** button next to the **All Items** link to open the **Inventory List** list views menu.



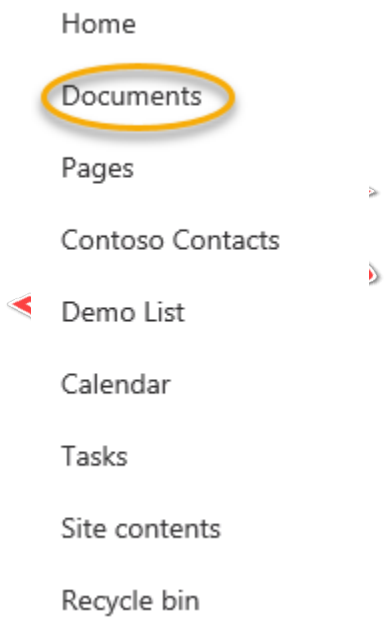
Note

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

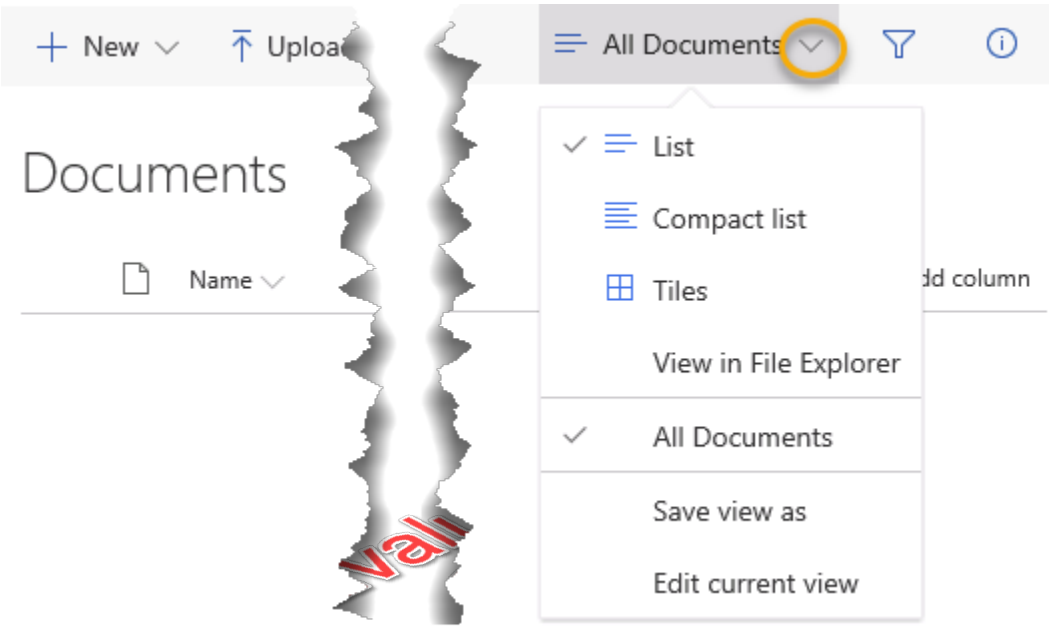
C. Note that the current view, **All Items** is the only view created by default for lists based on the **Custom List** template.

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.

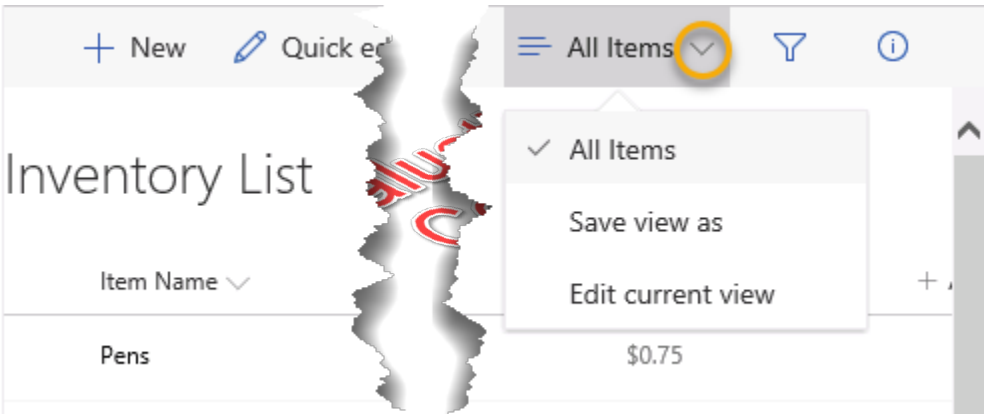
C. Note that the current view, **All Documents** is the only view created by default for libraries based on the **Document Library** template.

Exercise 10: Creating a Public View

15 to 25 minutes

In this exercise, you will learn to create a Public view.

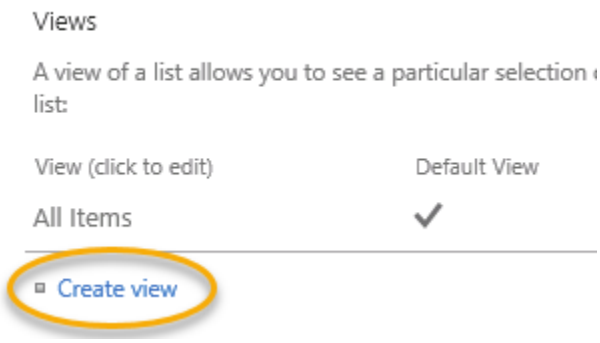
1. Create a new public view for the **Inventory List.**
   A. Click the **Inventory List** link in the **Quick Launch** menu. You may need to click **Site Contents** to locate the link.
   B. Click the **ellipsis/drop-down** button next to the **All Items** link to open the **Inventory List** views menu.



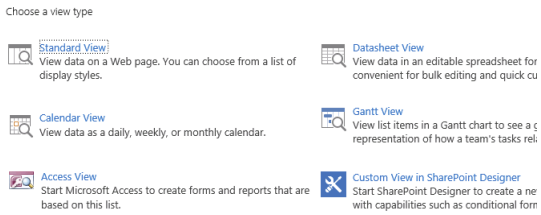
Note

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

   C. Click the **Create View** link in classic view, if you are using the default modern view, first you need to click **Settings** then **List Settings** to locate the **Create view** link.

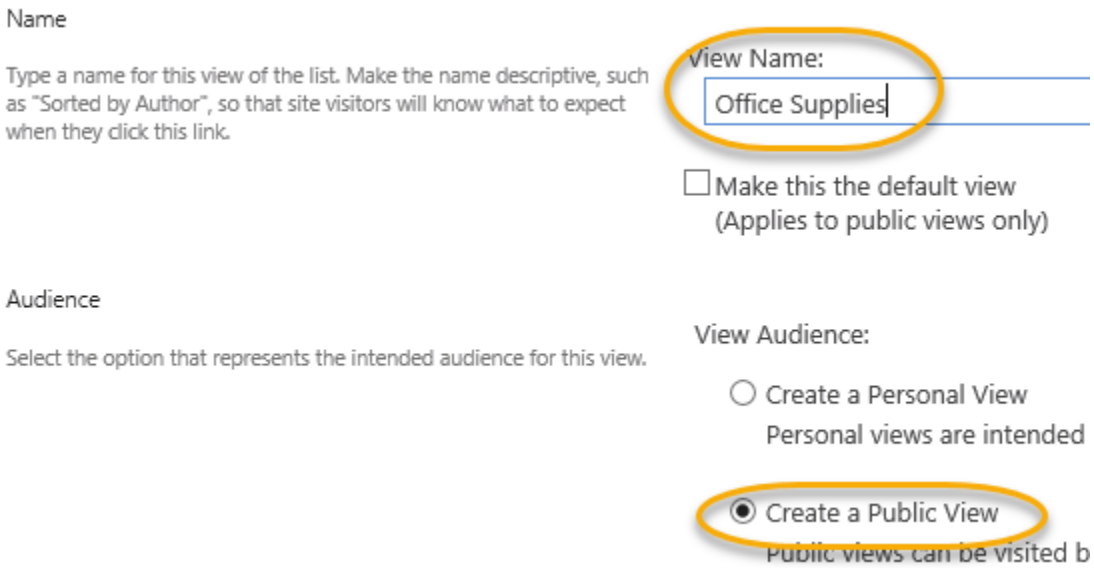


D. Take a moment to read through the view format options and their descriptions.



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

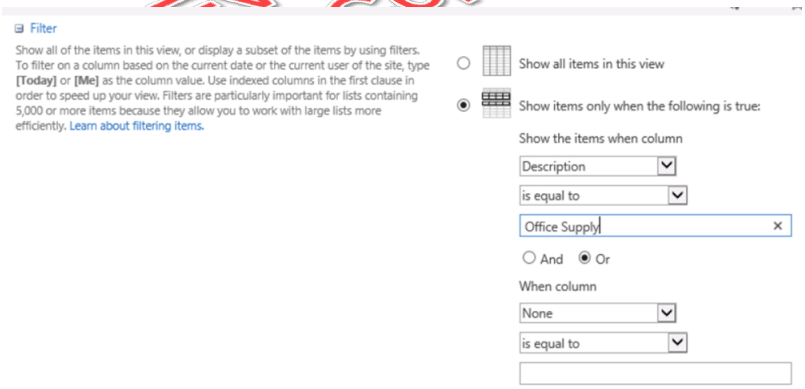
F. Enter "Office Supplies" in the **View Name** field and leave the **View Audience** field set to **Create a Public View**.



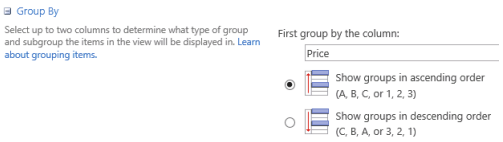
G. In the **Columns** section of the **Create View** form, select only the following columns:

- **Item Name**
- **Qty**
- **Price**

H. In the **Filter** section, choose the **Description** column in the **Column to Filter** drop-down list. Select **is equal to** in the **operator** drop-down field. Enter "Office Supply" in the **Value** field.



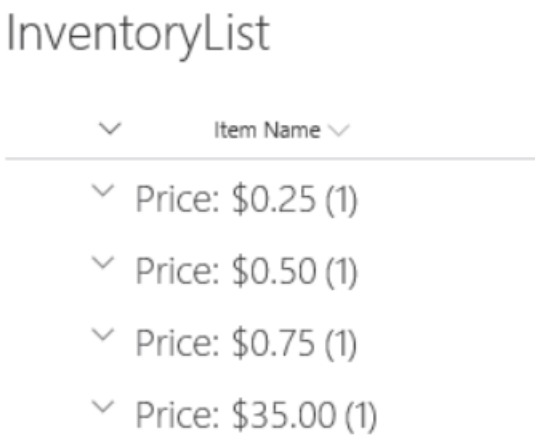
I. Expand the **Group By** section and then select **Price** in the **First group by the column:** drop-down list field and choose the **Show groups in descending order** option.



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 **Office Supplies** is selected and shaded blue in the view choices. The list of course is also filtered to only show items that are Office Supples and is grouped by **Price**. The groups are expandable but because of the small sampling of records, there may not be much to view.



Conclusion

In this lesson, you have learned:

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

LESSON 6
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.

6.1. 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 2019.

- Team Site
- Blog
- Project Site

- Community Site
- Document Center
- Records Center
- Business Intelligence Center
- Enterprise Search Center
- Basic Search Center

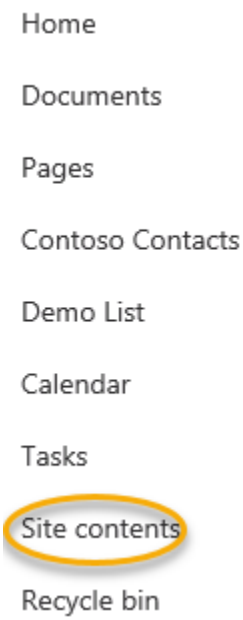
Additional Site Templates can be made available in any installation of SharePoint by creating custom templates or enabling Farm, Site, and Site Collection features.

6.2. Creating Sites

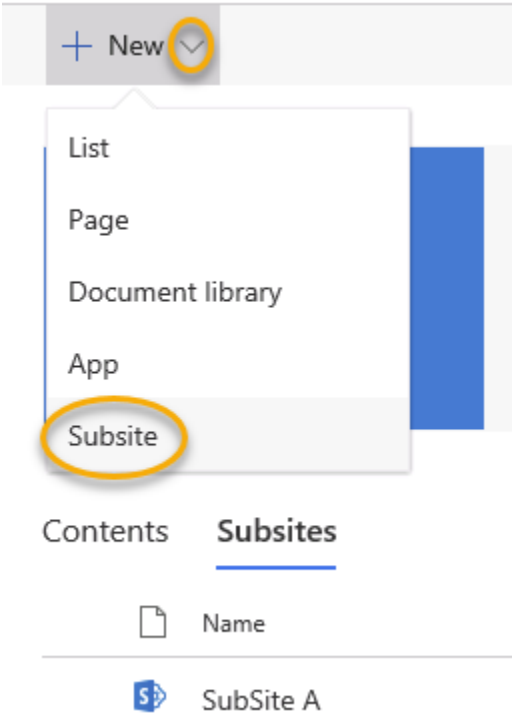
❖ 6.2.1. Creating a Team Site

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

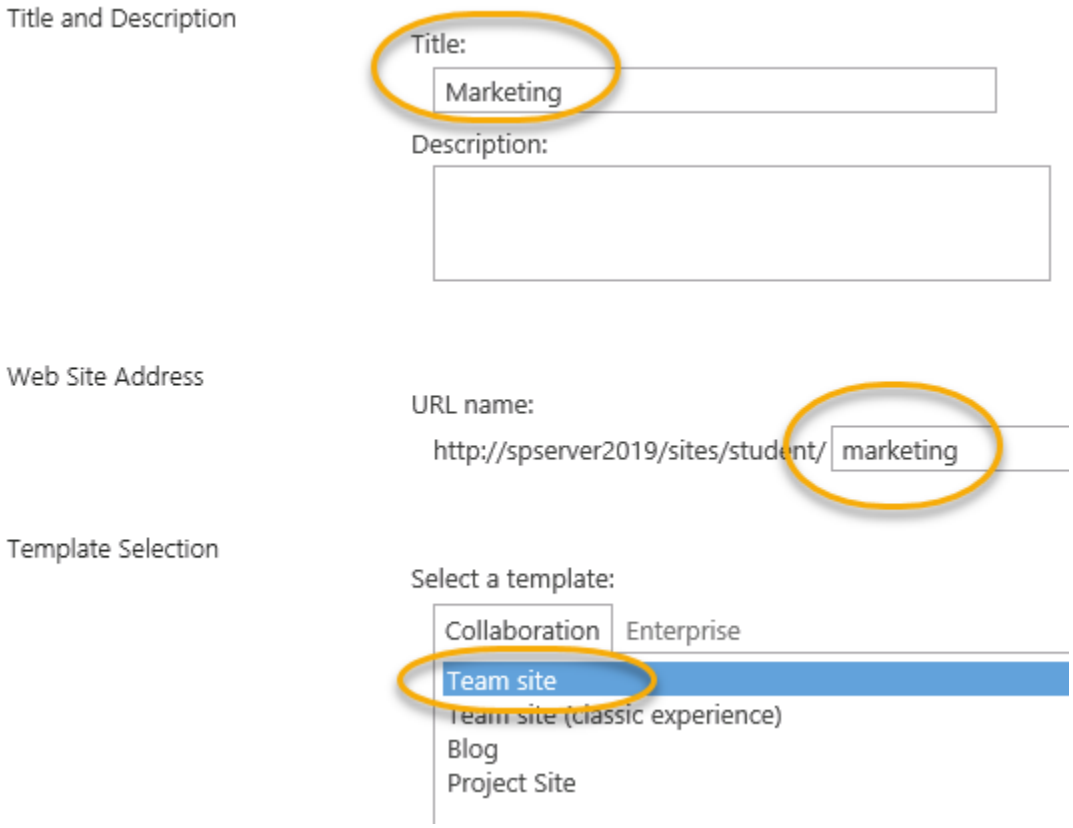
1. Create a new child site named "Marketing" using the **Team Site** template.
   A. Click the **Site Contents** link in the **Quick Launch** menu.



   B. Click the **New** drop-down, then **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.

Permissions

You can give permission to access your new site to the same users who have access to this parent site, or you can give permission to a unique set of users.

Note: If you select **Use same permissions as parent site**, one set of user permissions is shared by both sites. Consequently, you cannot change user permissions on your new site unless you are an administrator of this parent site.

User Permissions:

- (●) Use same permissions as parent site
- ( ) Use unique permissions

Navigation

Display this site on the Quick Launch of the parent site?

( ) Yes (●) No

Display this site on the top link bar of the parent site?

(●) Yes ( ) No

Navigation Inheritance

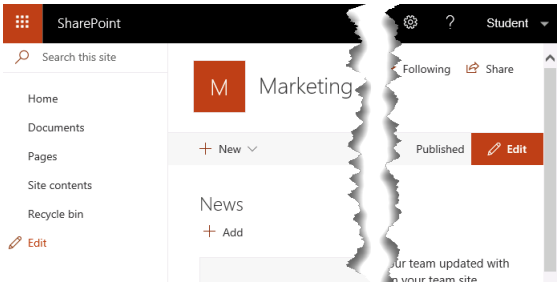
Use the top link bar from the parent site?

( ) Yes (●) No

Looking Forward

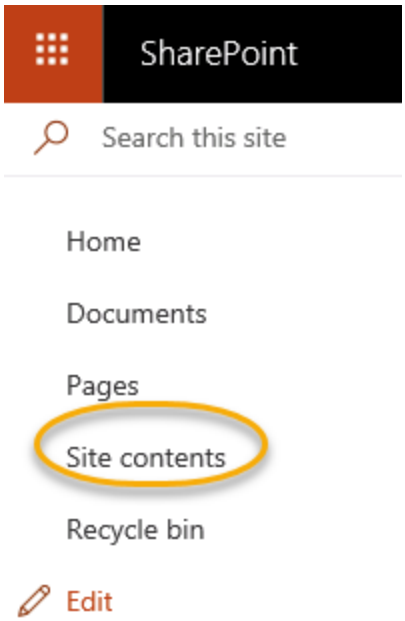
In a later walk-through in this lesson, you will learn how to change the navigation settings of the **Marketing** site. In a later part of this course, you will change the permissions.

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.

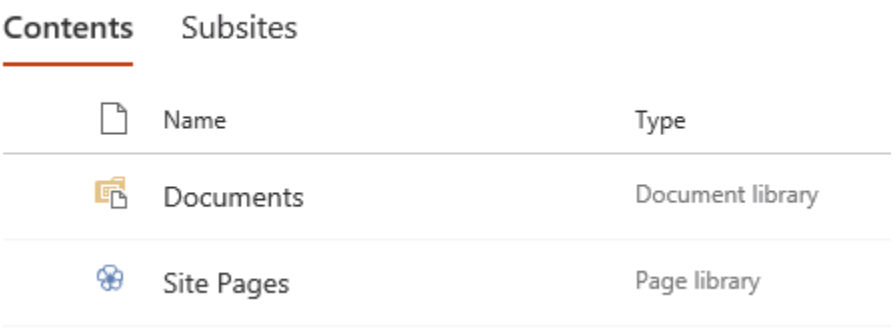


2. View the lists and libraries that come with the **Team Site** template.

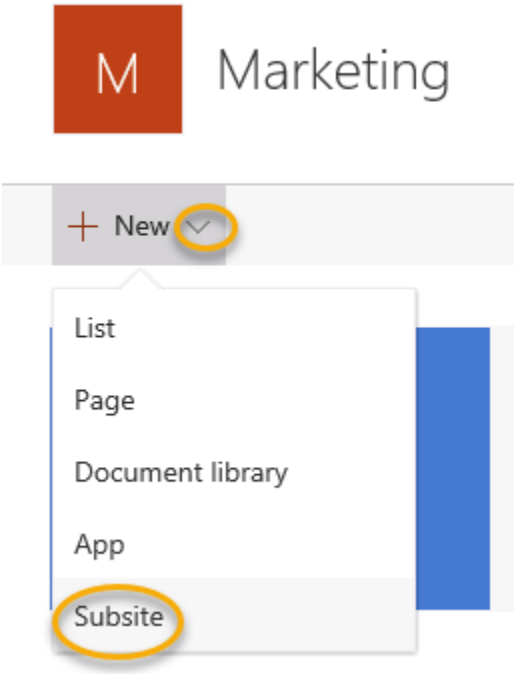
   A. In the **Marketing** site, click the **Site Contents** link in the **Quick Launch** menu.



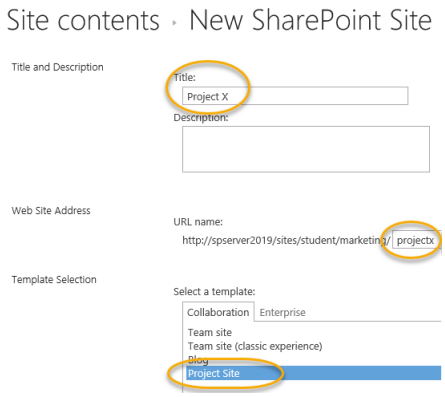
   B. Take a few moments to look through the Lists and Libraries created by default from the **Team Site** template.



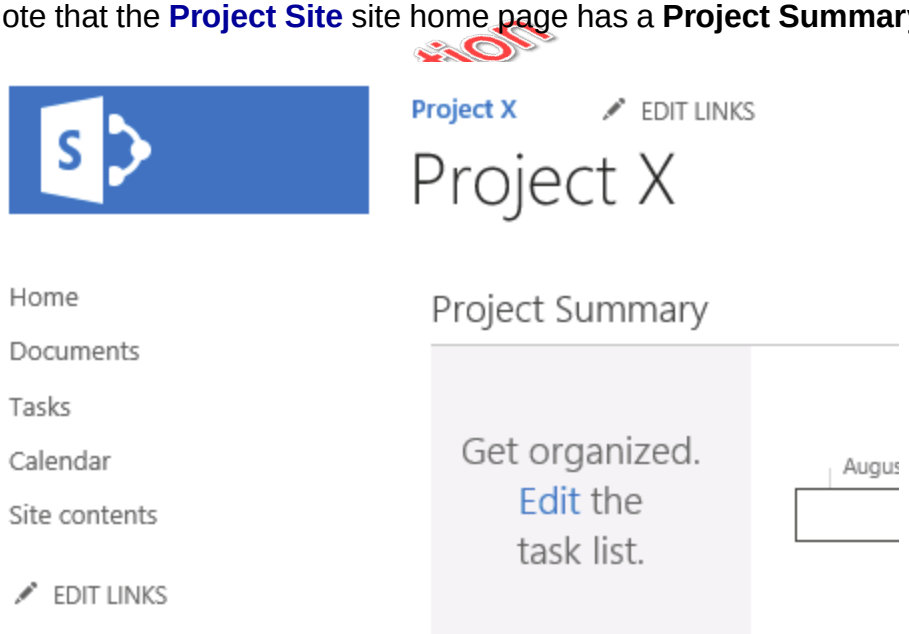
3. Create a new child site to **Marketing** using the **Project Site** template.
   A. Click the **Site Contents** link in the **Quick Launch** menu. Click the **New** drop-down, then **Subsite** link..



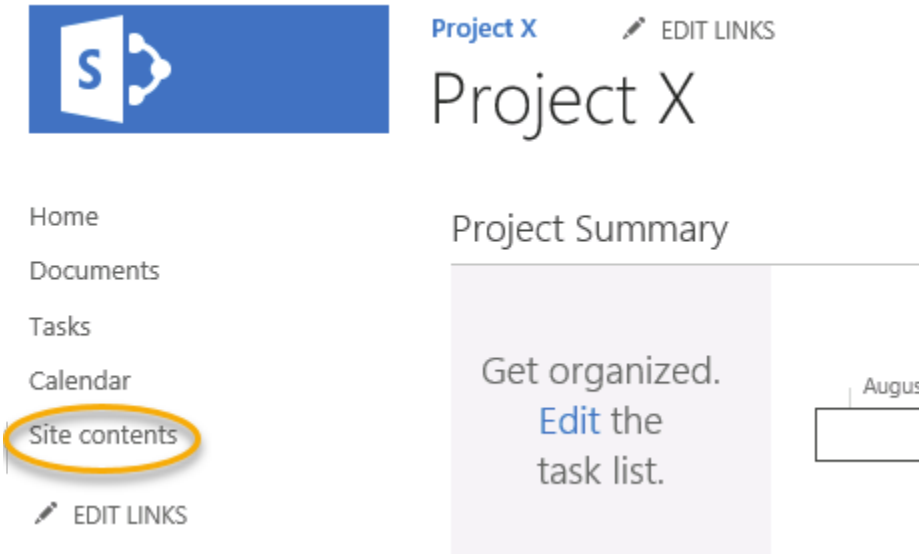
   B. Select the **Project Site** template in the **New SharePoint Site** form and type “Project X” in the **Title** field and “projectx” in the **URL name** field. Click the **Create** button to complete the process.



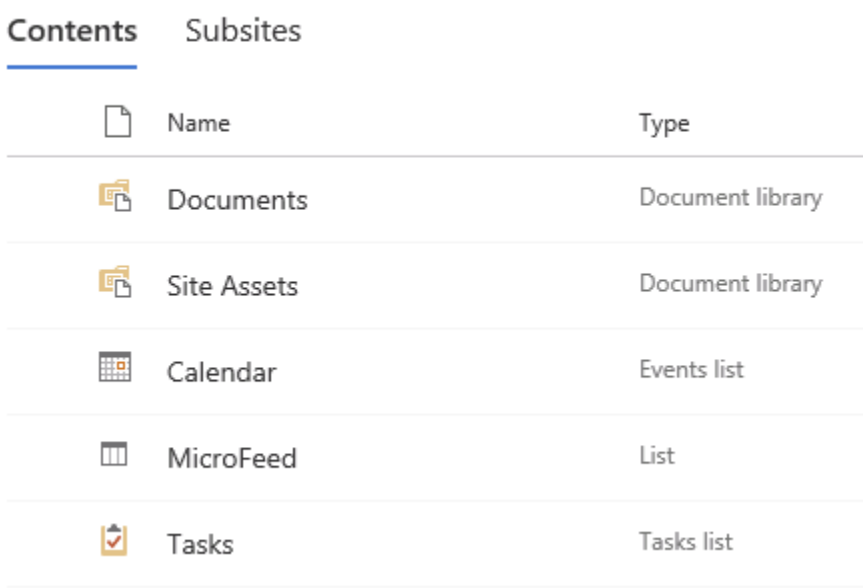
4. Explore what comes with the **Project Site** template.
   A. Note that the **Project Site** site home page has a **Project Summary** view.



   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.

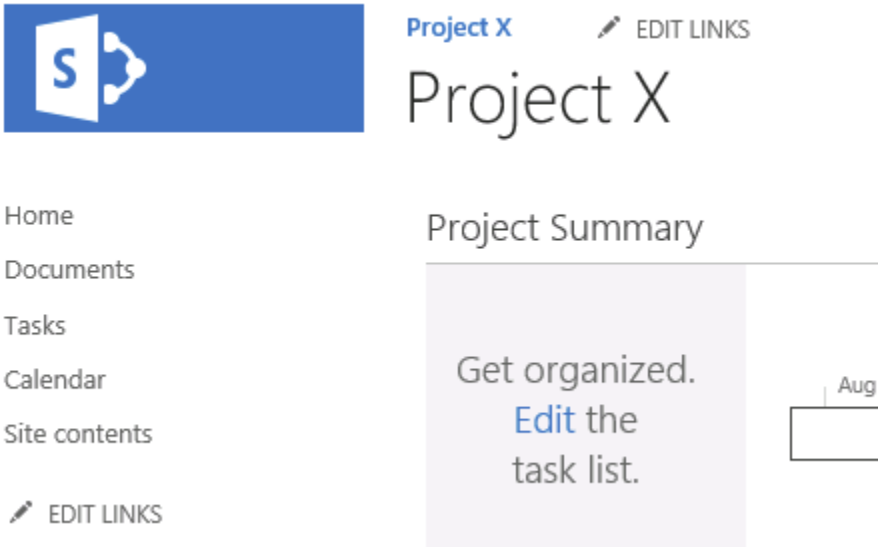


6.3. Site Navigation

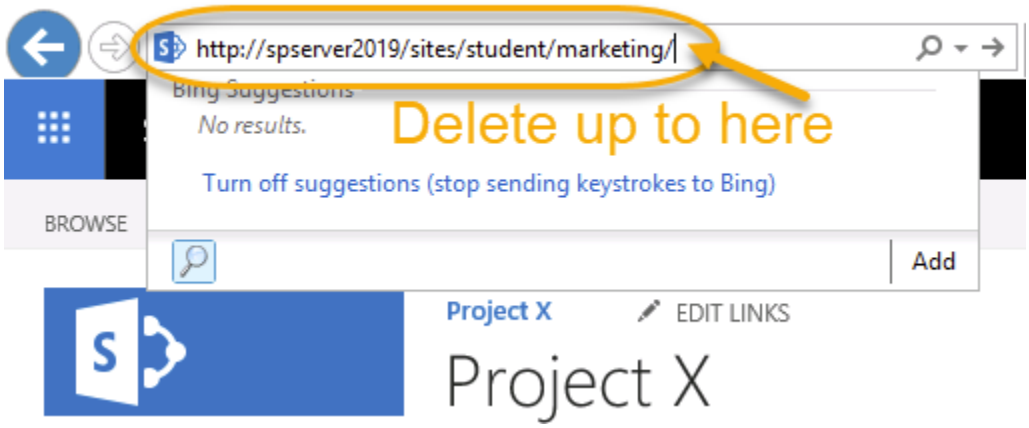
❖ 6.3.1. Managing Site Navigation

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.

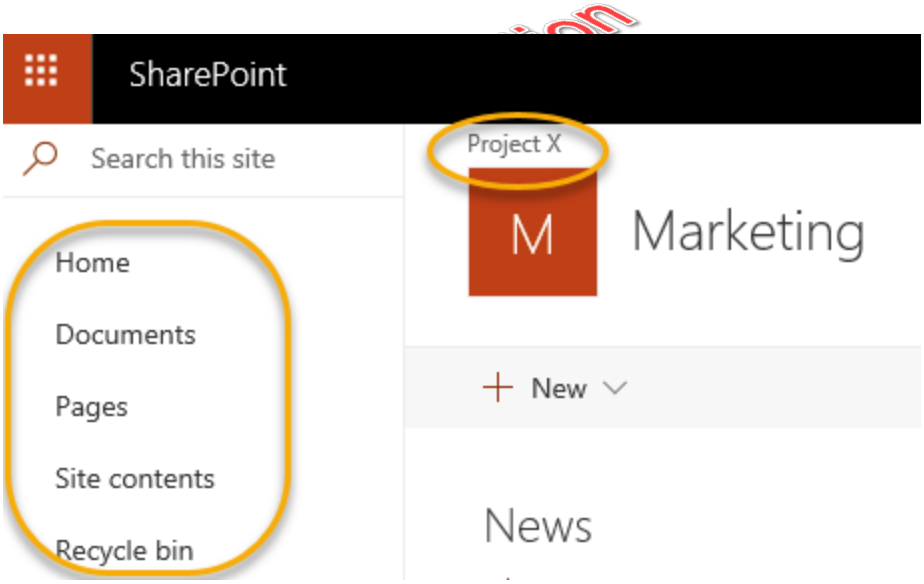
1. Verify that both the **Project X** and the **Marketing** sites have separate **Top Link Bars** and **Quick Launches**.
   A. Verify that you are currently in the **Project X** home page by clicking the **Project X** link in the **Top Link Bar**.



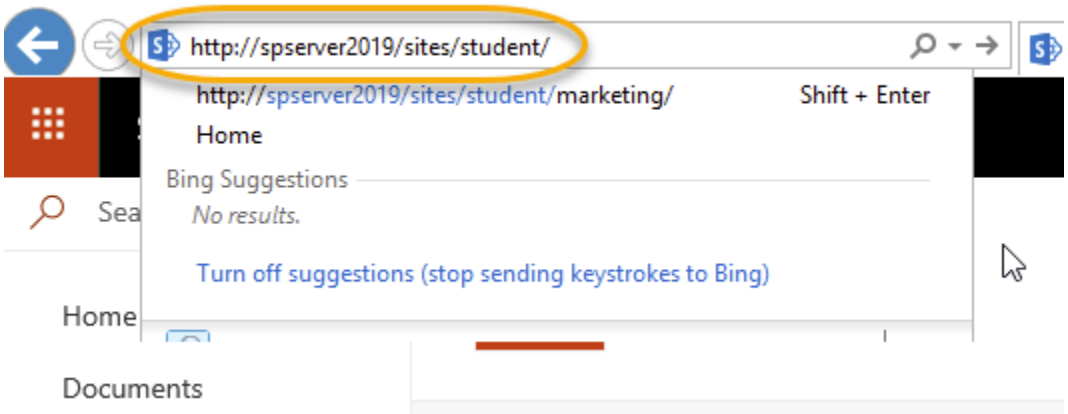
   B. Note that there are no additional links in the **Top Link Bar** of the **Project X** site.
   C. There is currently no obvious way to navigate back to the parent site **Marketing** from the child site **Project X**. To navigate back to **Marketing**, remove the text in browser's address field back to "Marketing" as shown in the screen capture.



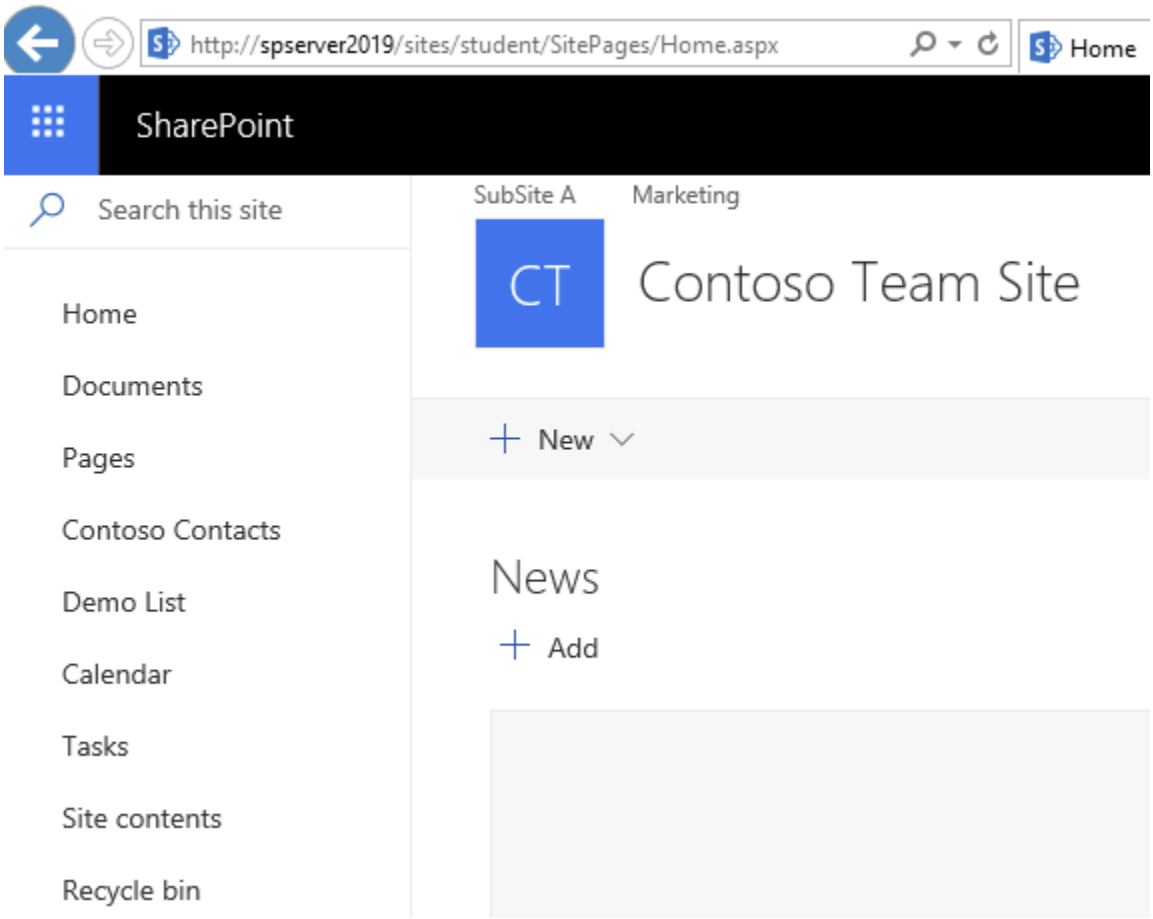
D. Note that now the **Top Link Bar** has a **Marketing** link as well as a **Project X** link. Also note that the **Quick Launch Menu** lists only content from this site.



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.



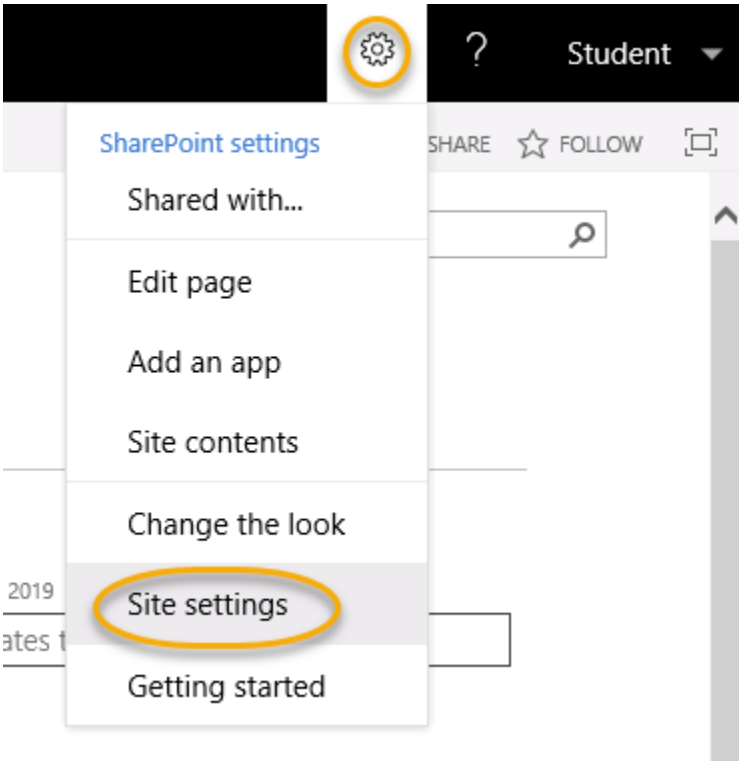
F. Note that the root parent site links in the **Top Link Bar** as shown in the image. The **Contoso Team Site** link in this site's **Top Link Bar** links to the Home page for this site. Additionally, the **Quick Launch Menu** only has links for content within this site.



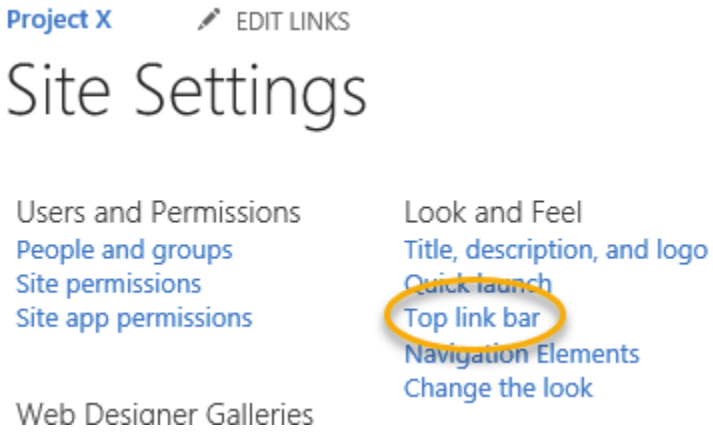
2. Configure the **Project X** site to share the **Top Link Bar** of its parent site **Marketing**.

   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.

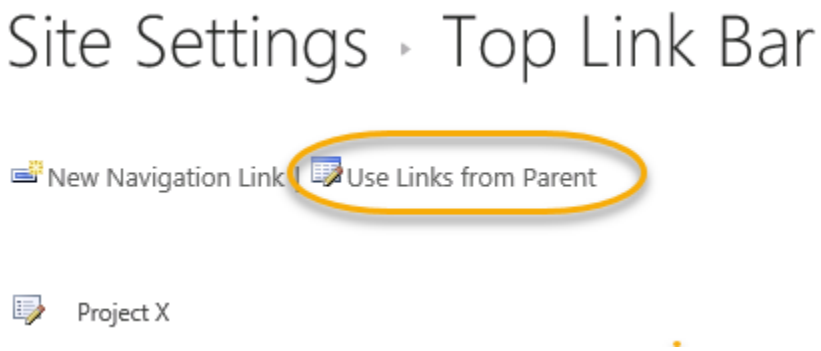
   B. Within the **Project X** site, click the **Settings** button and select the **Site Settings** link from the menu.



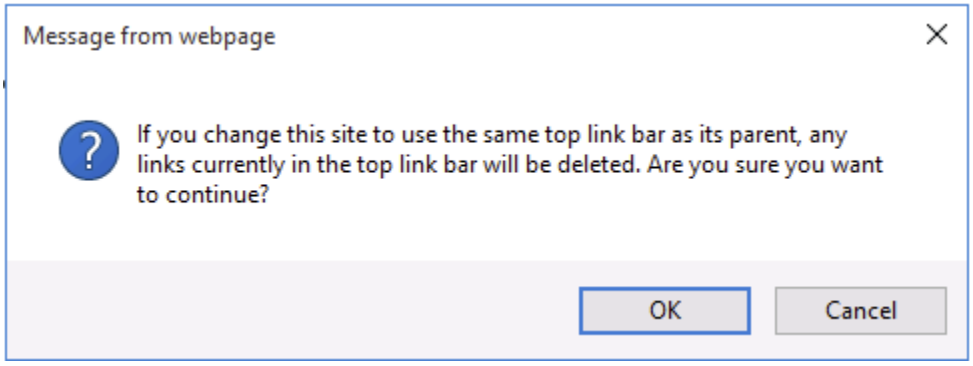
   C. Click the **Top link bar** link under the **Look and Feel** group on the **Site Settings** page.



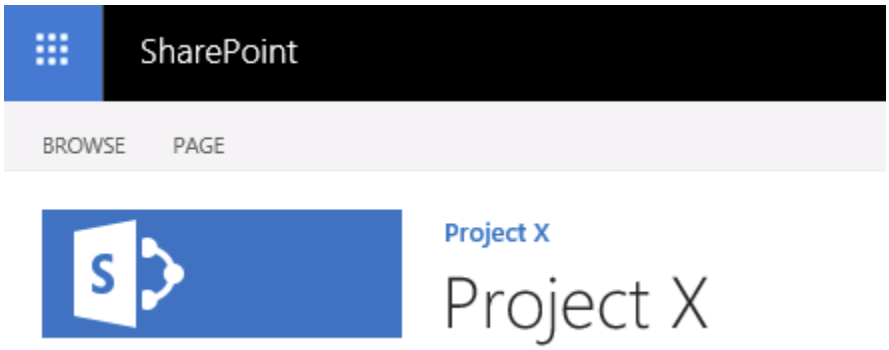
D. Click the **Use Links from Parent** link on the **Top Link Bar** settings page.



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.



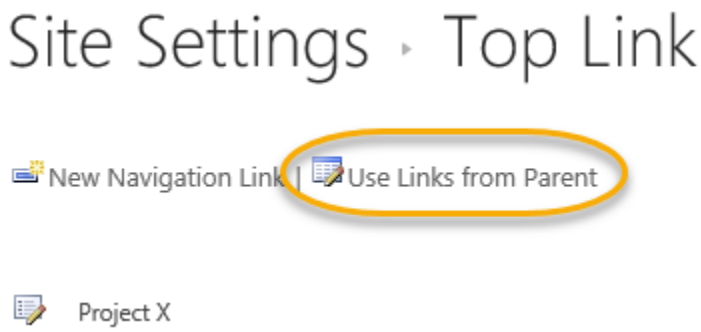
G. Click the **Marketing** link in the **Top Link Bar** and verify that it takes us to the Home page of the **Marketing** site.

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

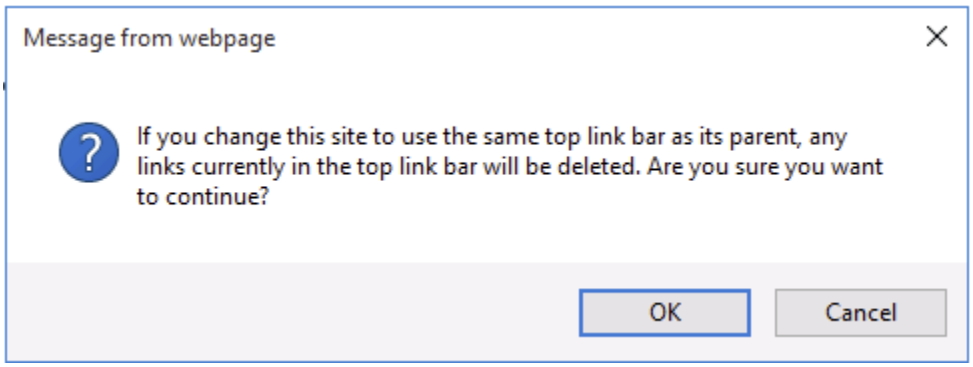
   A. Within the **Marketing** site, click the **Settings** button and select the **Site Settings** link from the menu.

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

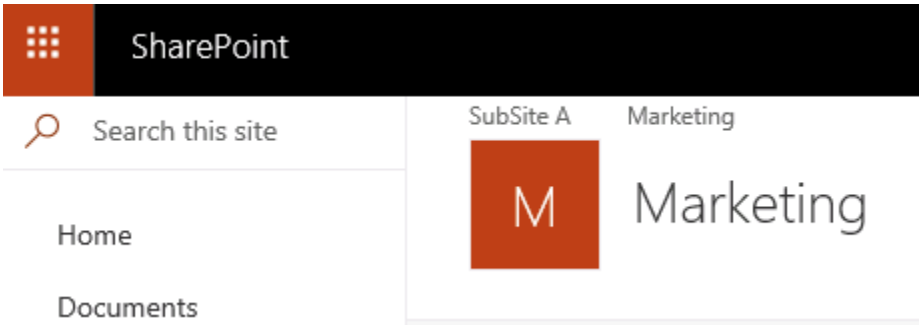
   C. Click the **Use Links from Parent** link on the **Top Link Bar** settings page.



   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.



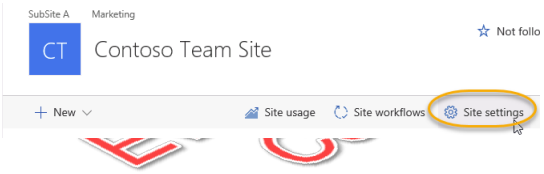
   E. Verify that now the **Marketing** site has the same **Top Link Bar** of the parent, but you have lost the link to **Project X**. You can fix that by modifying the **Top Link Bar** of the root parent site.



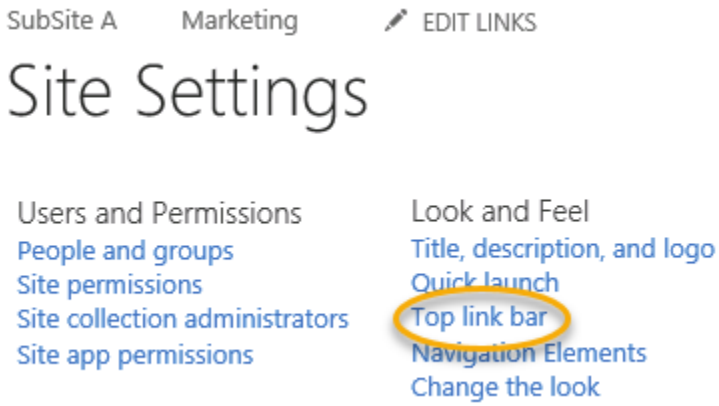
F. Click the **Contoso Home Site** link in the **Top Link Bar** and verify that it takes you to the Home page of the root parent site.

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

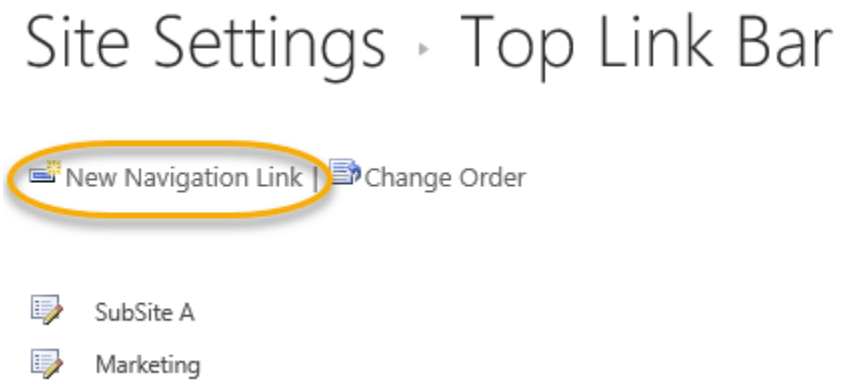
A. While in the root parent site, click the **Site Contents** button and select the **Site Settings**.



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

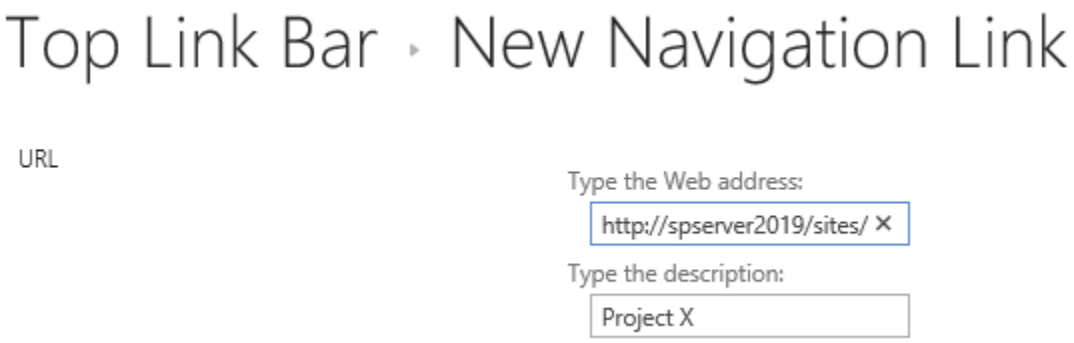


C. Click the **New Navigation Link** link on the **Top Link Bar** settings page.



D. On the **Edit Navigation Link** page enter "http://spserver2019/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.

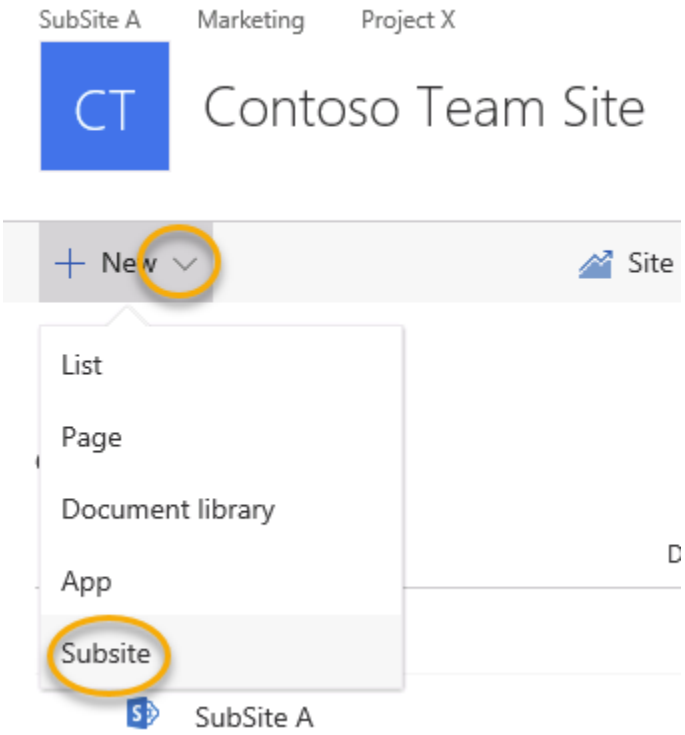


Exercise 11: Creating Team Sites

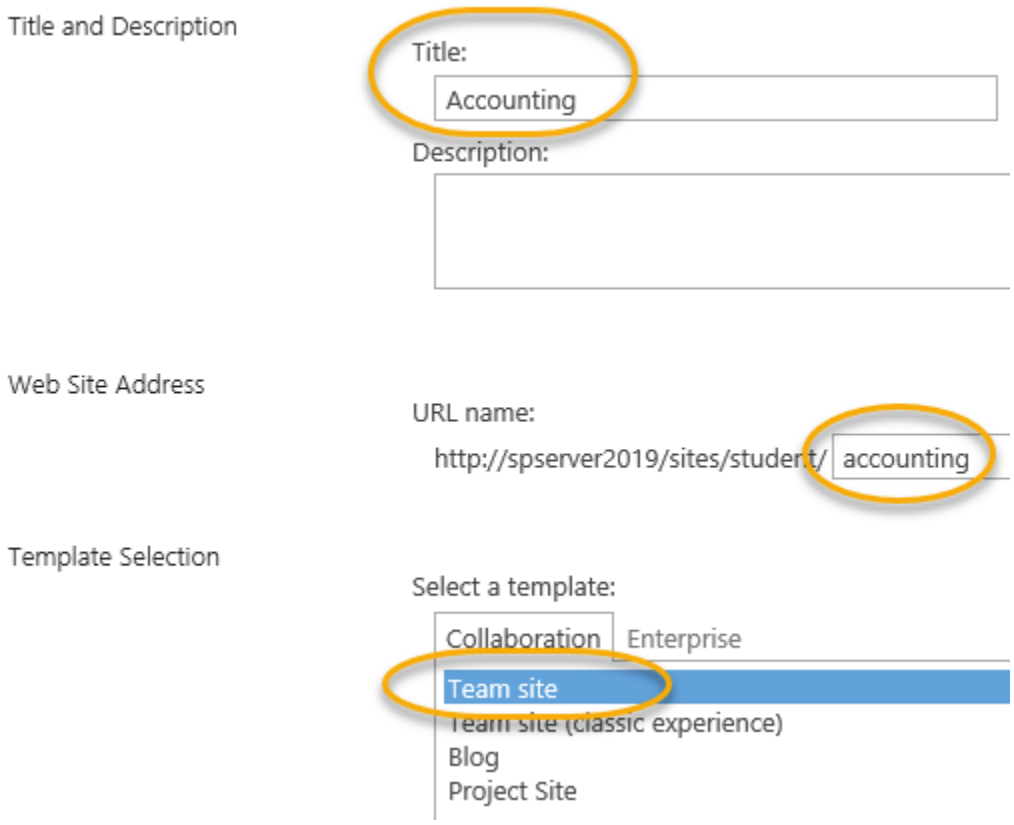
10 to 15 minutes

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. Click the **New** drop-down, then **Subsite** link.



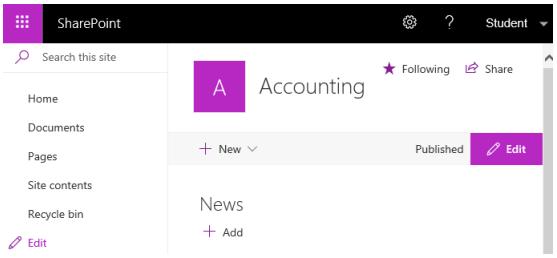
   B. Type “Accounting” in the **Title** field and “accounting” in the **URL name** field. Ensure that the **Team Site** template is selected in the **Select a template:** option.



C. 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.

D. 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.

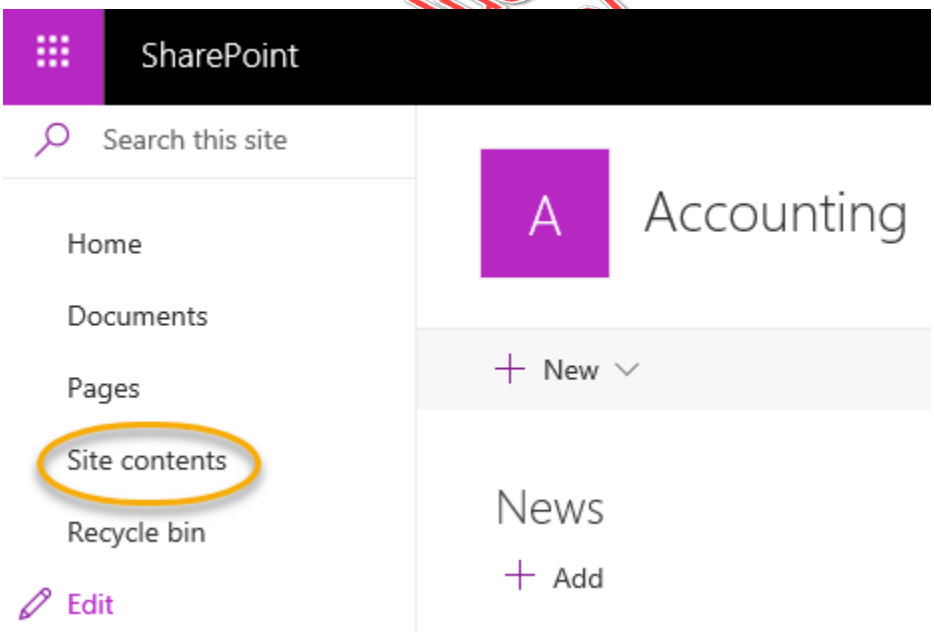


Note

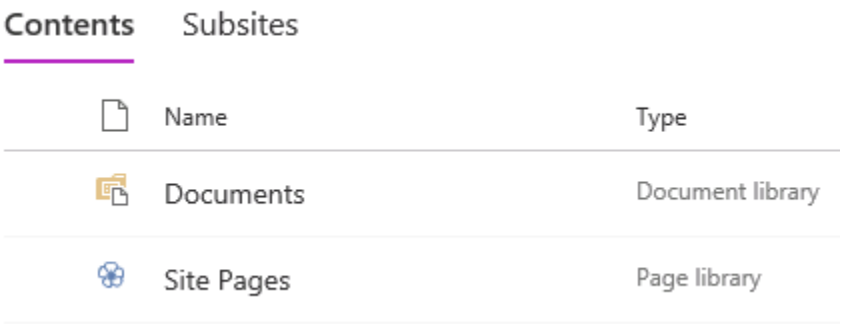
Based on the options left at their default values, this child Team Site does not share any of the links from the parent site.

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

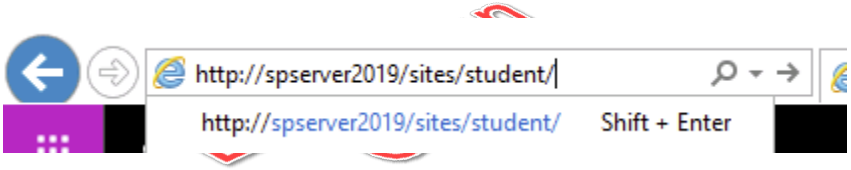
   A. In the **Accounting** site, click the **Site Contents** link in the **Quick Launch** menu.



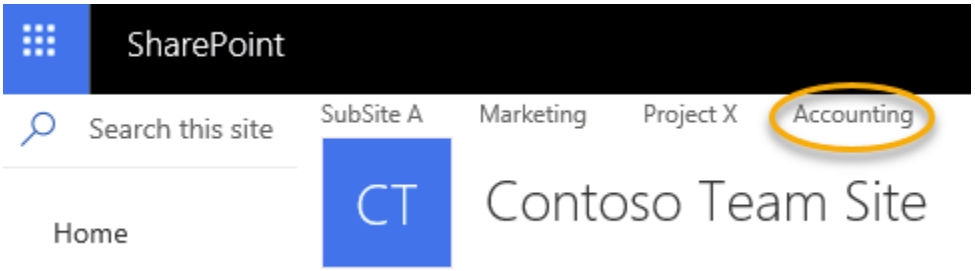
   B. Take a few moments to look through the Lists and Libraries created by default from the **Team Site** template.



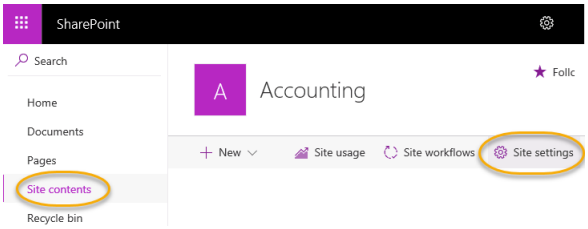
3. Navigate back to the root parent site.
   A. There is currently no obvious way to navigate back to the parent site **Contoso Home Site** from the child site **Accounting**. To navigate back to **Accounting** remove the text in browser's address field back to **before** "Accounting" as shown in the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



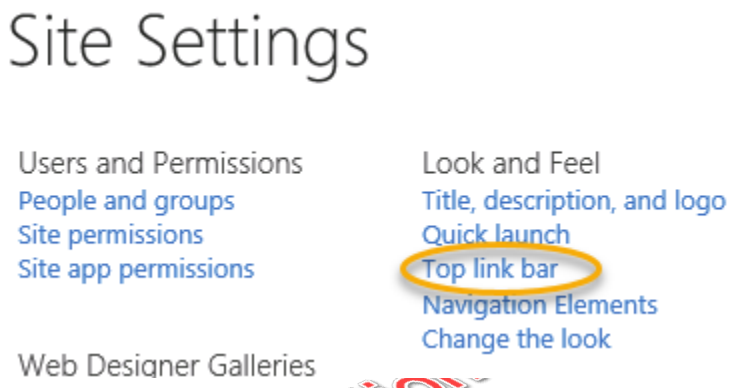
   B. Note that the new **Accounting** site has a link on the parent site's **Top Navigation** bar.



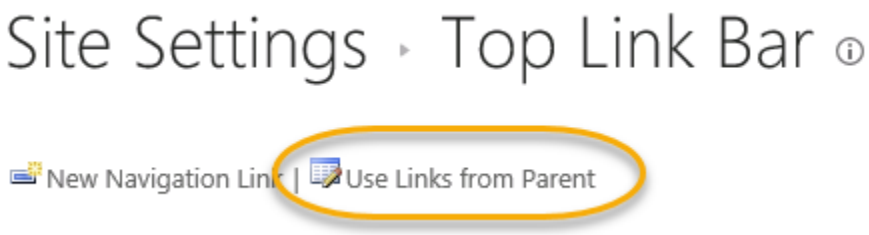
4. Modify the **Accounting** site to use the same **Top Link Bar** as the parent site.
   A. Click the **Accounting** link in the **Top Navigation** bar.
   B. Within the **Accounting** site, click the **Site Contents** button and select the **Site Settings** link.



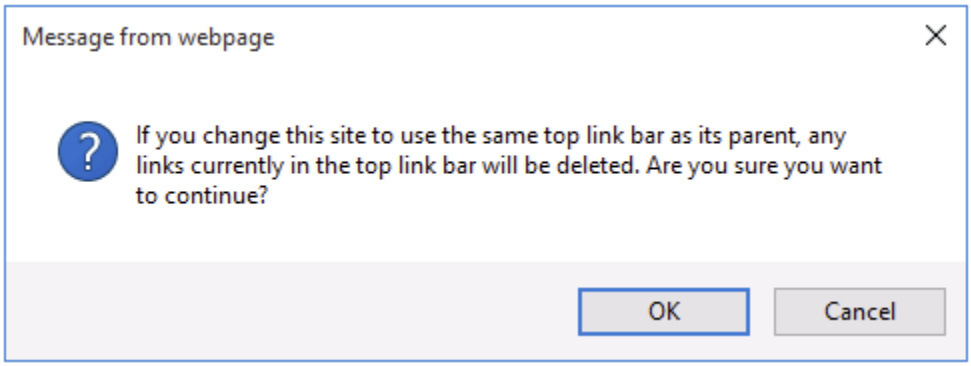
C. Click the **Top link bar** link under the **Look and Feel** group on the **Site Settings** page.



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.



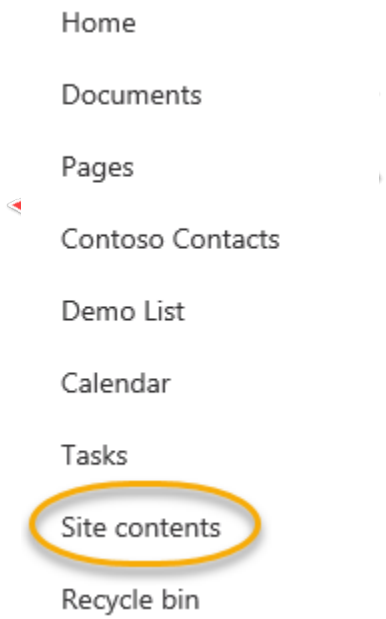
F. Note how the **Accounting** site now has the same **Top Link Bar** as the parent site. This makes it easier to navigate back to the parent site as well as sibling sites.

Exercise 12: Creating a Blog Site

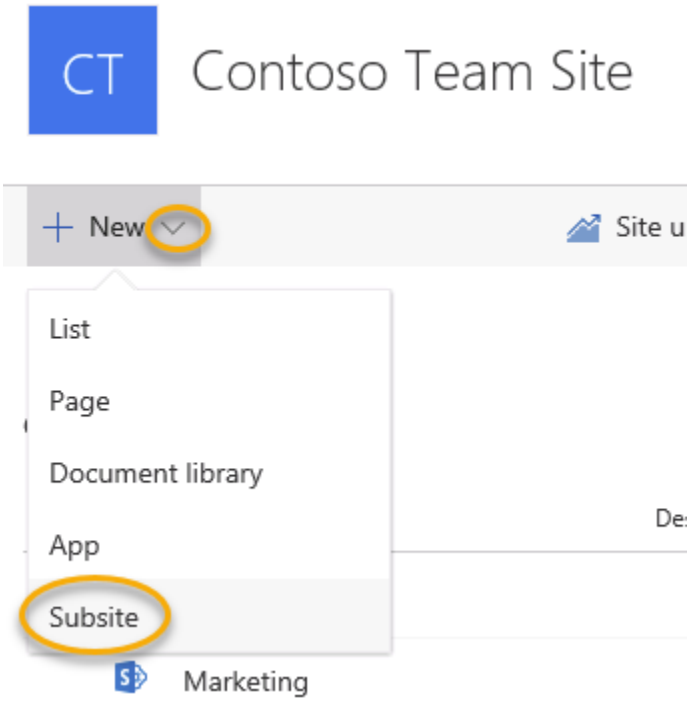
15 to 25 minutes

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

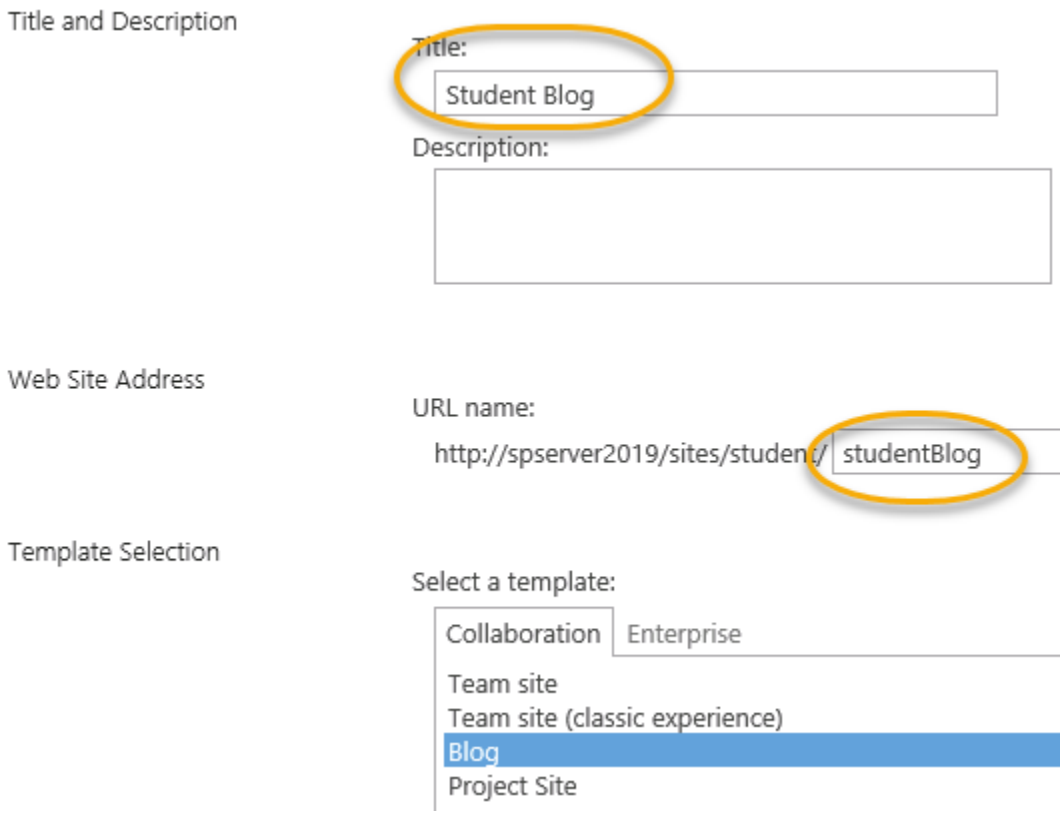
1. Create a new Blog site as a child site to root parent site.
   A. Click the **Site Contents** link in the **Quick Launch** menu.



   B. Click the **New** drop-down, then **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.

Permissions

You can give permission to access your new site to the same users who have access to this parent site, or you can give permission to a unique set of users.

Note: If you select **Use same permissions as parent site**, one set of user permissions is shared by both sites. Consequently, you cannot change user permissions on your new site unless you are an administrator of this parent site.

User Permissions:

- (●) Use same permissions as parent site
- ( ) Use unique permissions

Navigation

Display this site on the Quick Launch of the parent site?

( ) Yes (●) No

Display this site on the top link bar of the parent site?

(●) Yes ( ) No

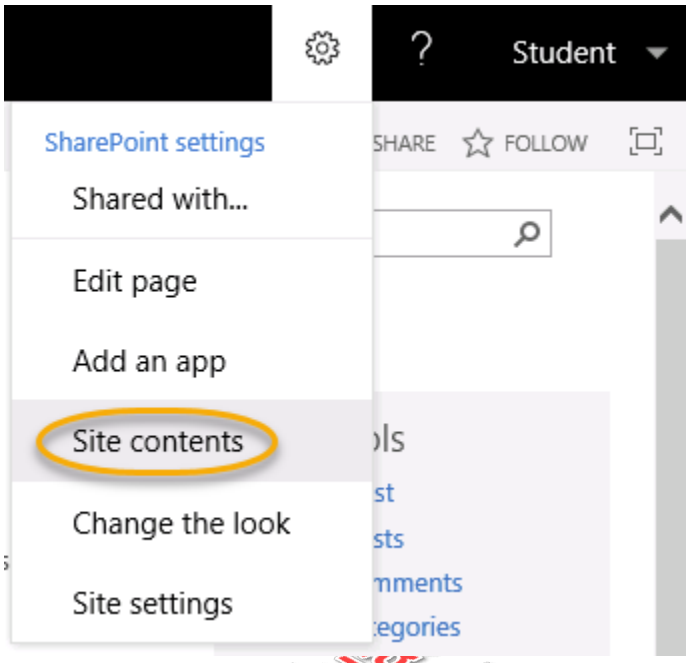
Navigation Inheritance

Use the top link bar from the parent site?

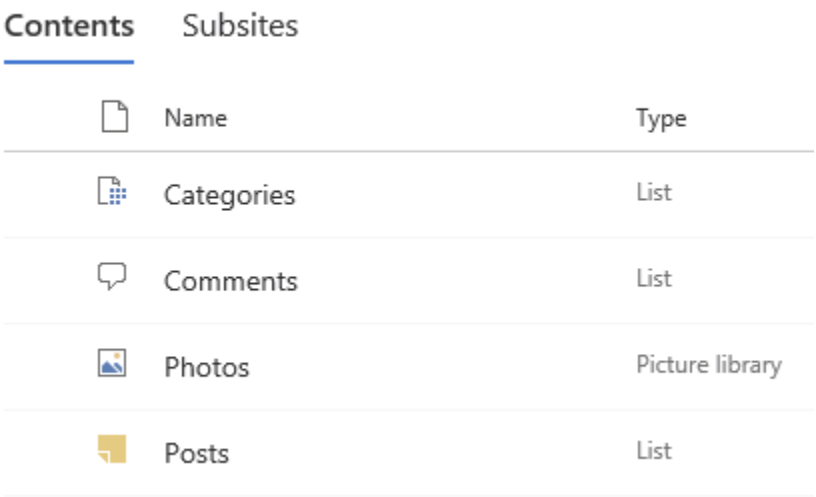
(●) Yes ( ) No

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.

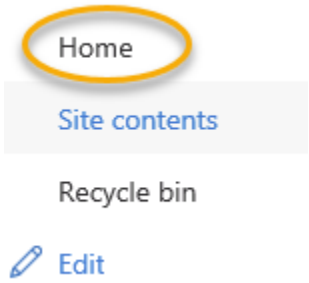
B. Click the **Settings** drop-down and click the **Site Contents** link from the menu.



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.

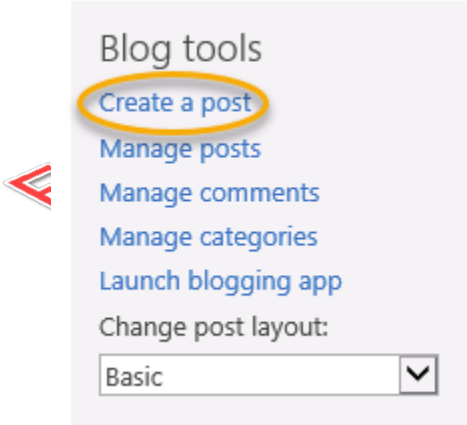
   C. Click the **Save** button to save the change.
   D. Repeat the previous steps to create categories for “SharePoint” and “Humor”.
   E. Your final list should look similar to the following image.

Categories

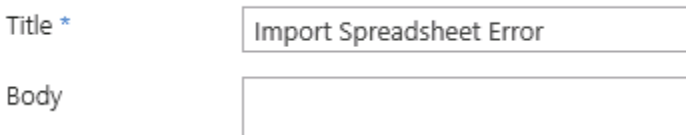
- Events
- Humor
- Ideas
- IT
- Opinions
- SharePoint

ADD CATEGORY

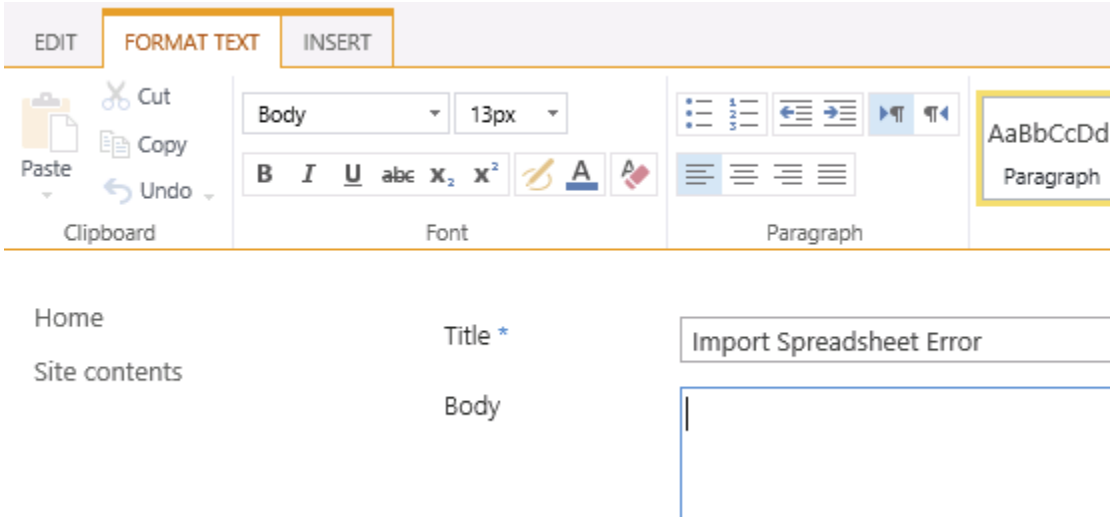
4. Create a new blog entry in your blog site
   A. Click the **Create a post** link under the **Blogs tools** area.



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

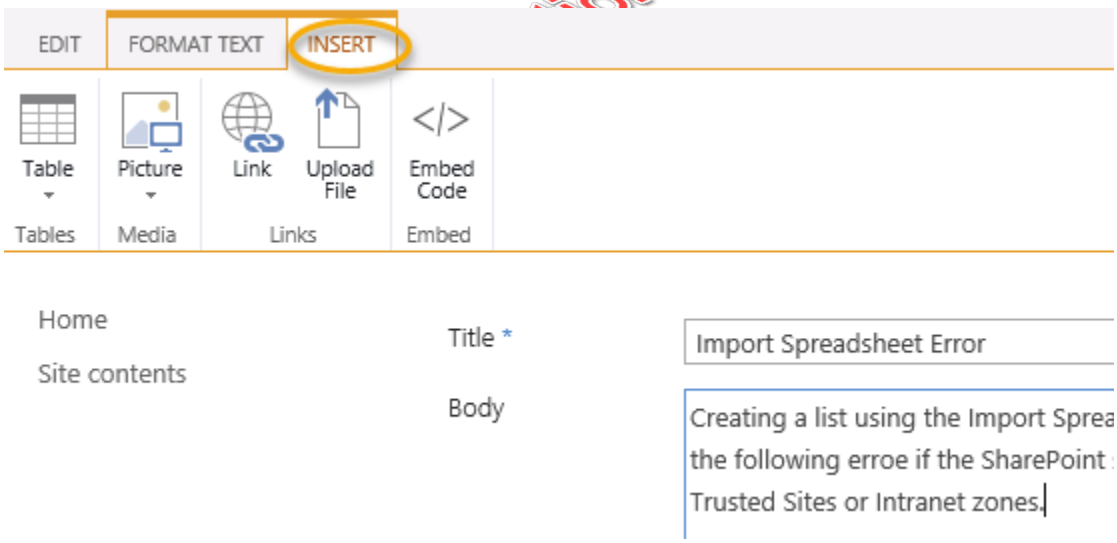


   C. Click inside the **Body** field. Note the **Posts - New Item** form changes the toolbar to enable you to enter formatted text as well as insert items such as images.



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.

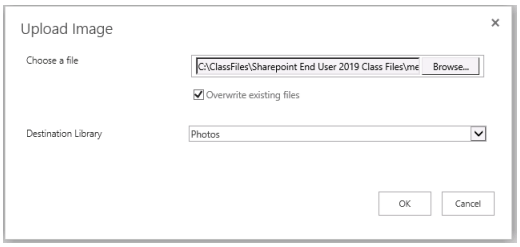


F. Click the **Picture** drop-down link on the **Insert** toolbar and choose **From Computer**.

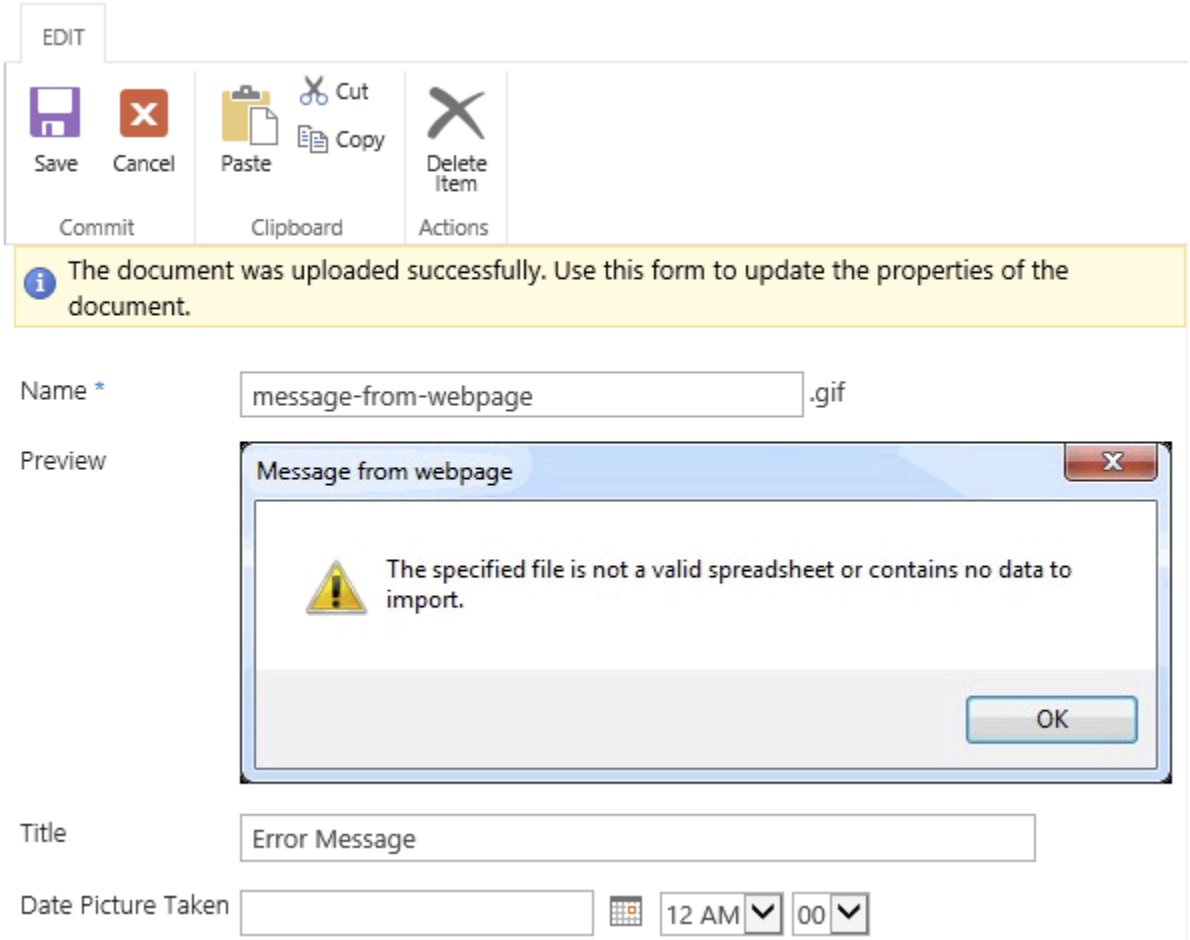
G. In the **Select Picture** dialog form, click the **Browse** button to open the **Choose File to Upload** dialog window.

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.

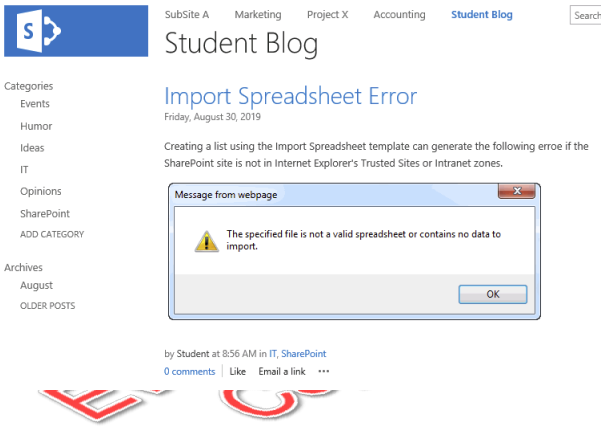


K. Highlight both **IT** and **SharePoint** in the **Category list** box and click the **Add** button. This will associate this post with those categories.

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.



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**.