

# SharePoint for Office 365 End User Training



with examples and  
hands-on exercises

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**WEBUCATOR**

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## **Class Files**

Download the class files used in this manual at

<https://static.webucator.com/media/public/materials/classfiles/SHP365.1-2.0.0.zip>.

## **Errata**

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

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# LESSON 1

## SharePoint 365 Setup

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### Topics Covered

- Setting up the sample site for class.

### Introduction

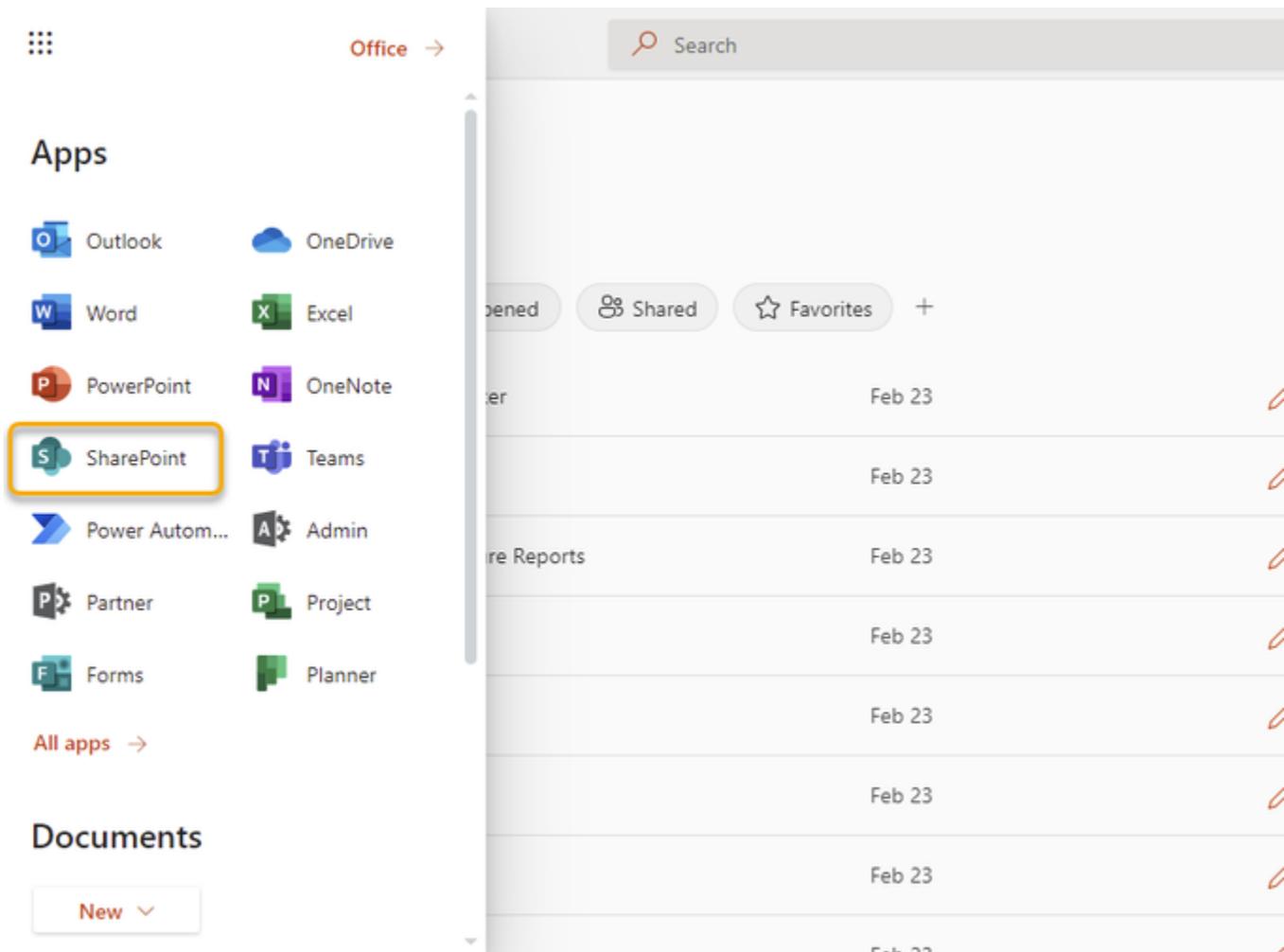
You will need a subscription to create a site. Below are the steps to get started.

Evaluation  
Copy

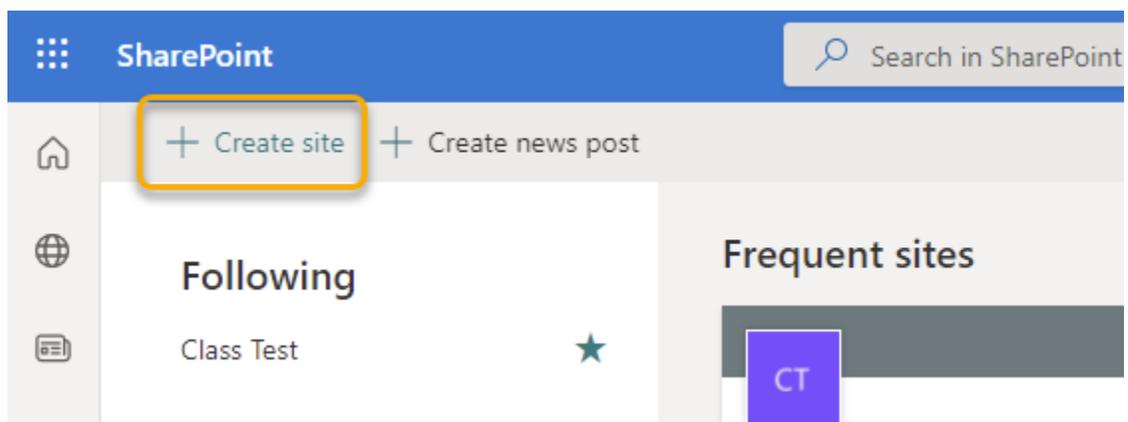


### 1.1. SharePoint Online

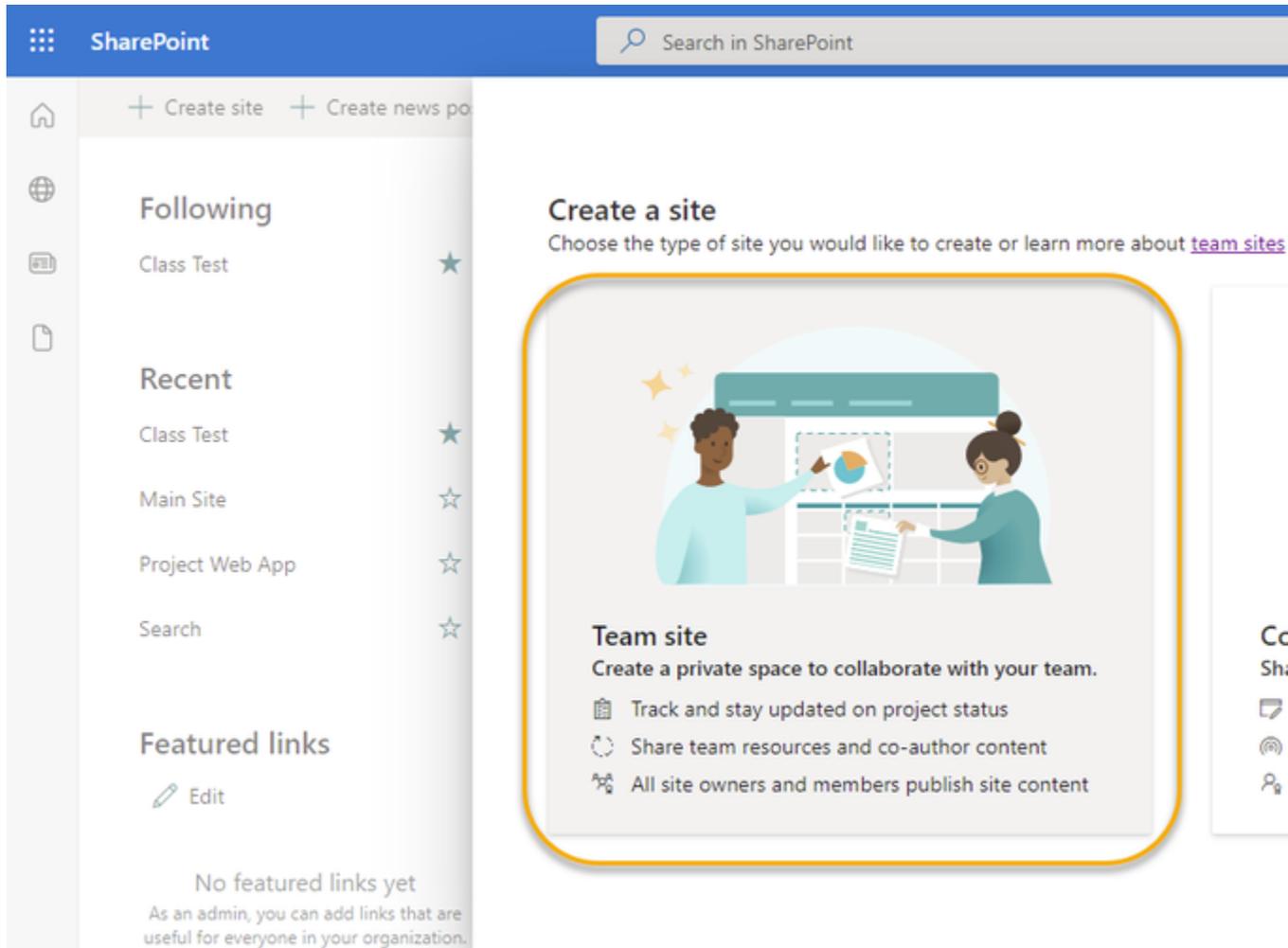
1. Navigate to your Office 365.
  - A. Launch your preferred browser.
  - B. Log in to your Office 365.
  - C. Choose **SharePoint** from the Apps list.



D. Click **Create Site**.



E. Click **Team Site**.



- F. Type “Class Samples” as the Site name, “Class Sample” as the Group mail address, “Use to practice in class.” as the Site Description. The rest of the settings are default. Click **Next**.

SharePoint Search in SharePoint

+ Create site + Create news po

**Following**

- Class Test ★

**Recent**

- Class Test ★
- Main Site ☆
- Project Web App ☆
- Search ☆

**Featured links**

 Edit

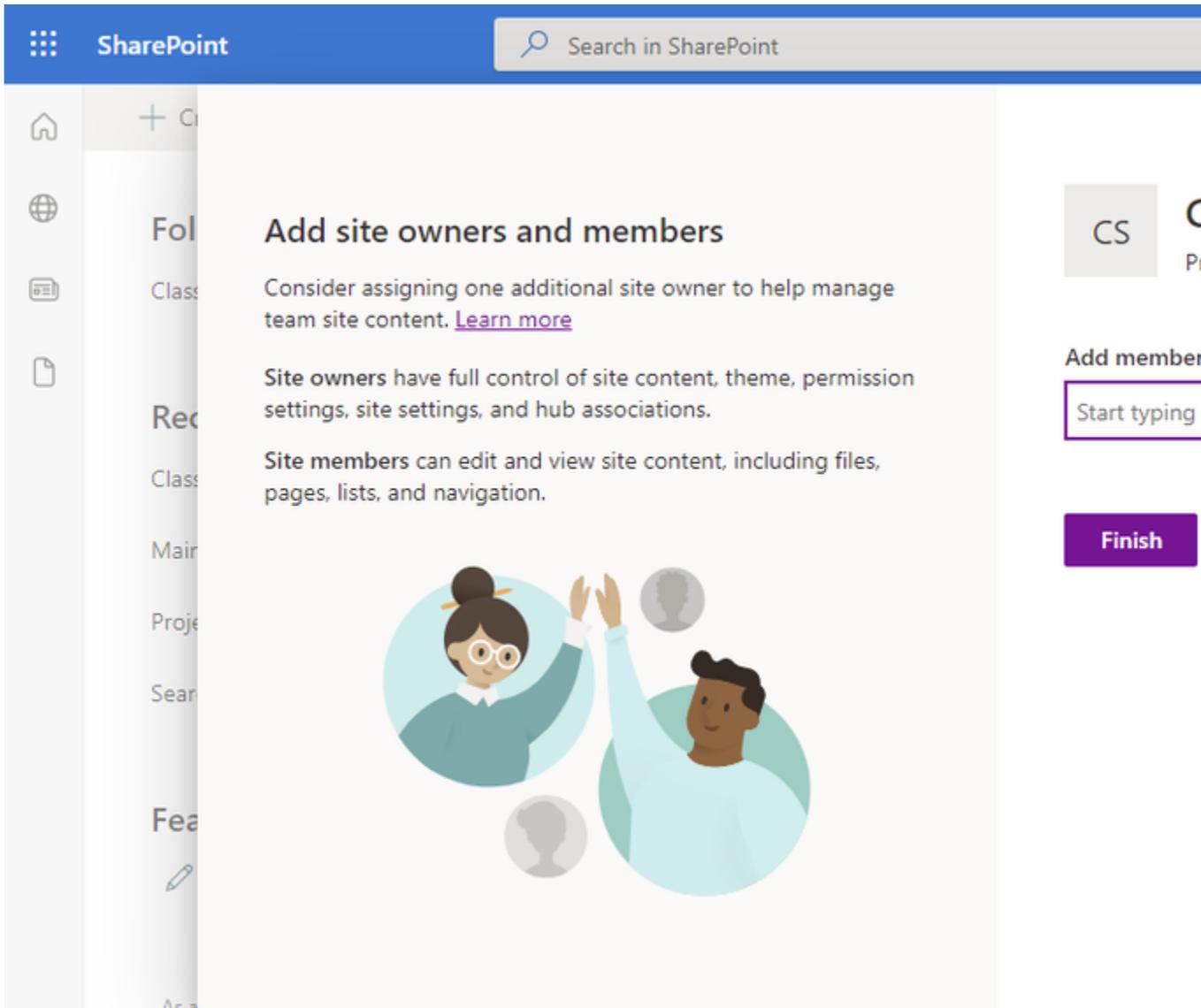
No featured links yet  
As an admin, you can add links that are useful for everyone in your organization.

Your team site will be connected to a Microsoft 365 group which gives your site a shared OneNote notebook, group email address, and team calendar.

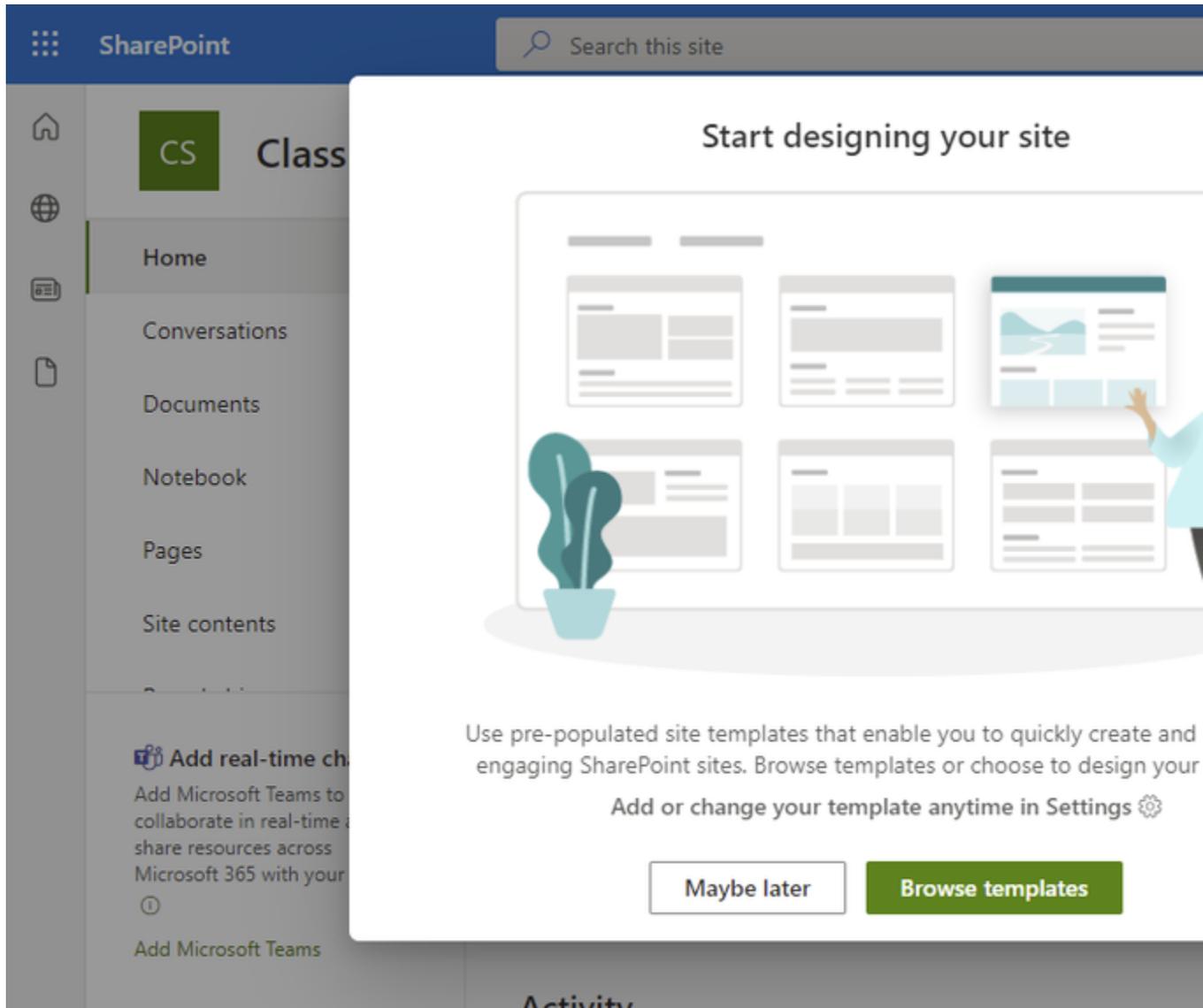
Connect your team site to a Microsoft Team to enable persistent chat by selecting **Next steps** in the suite navigation and then **Add real-time chat**. [Learn more](#)



G. Leave the group members blank for now and click **Finish**.



H. The site is now ready for class.



## Security Issues

If you encounter security issues, reach out to your site administrator.

## Conclusion

In this lesson, you have learned:

- How to set up the sample site for class.





# LESSON 2

## SharePoint 365 Introduction

---

### Topics Covered

- SharePoint online.
- SharePoint site hierarchy.
- Site layout.
- Navigation within a Site.

### Introduction

SharePoint 365 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. All of this collaboration can be done through a browser interface.



## 2.1. SharePoint Online

This course will focus on SharePoint Online.

The scope of this course is for the “end user” and most of the features that fall within that scope. Note that you may need to request further permissions and settings from your administrator if you are not able to perform some of the tasks you see in the course.

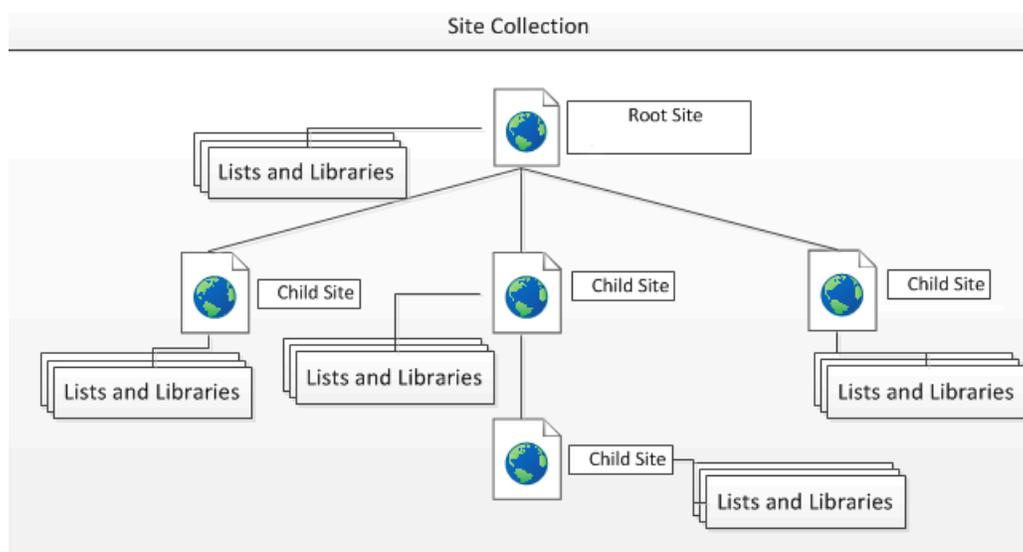


## 2.2. Site Layout and Navigation

### ❖ 2.2.1. 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.

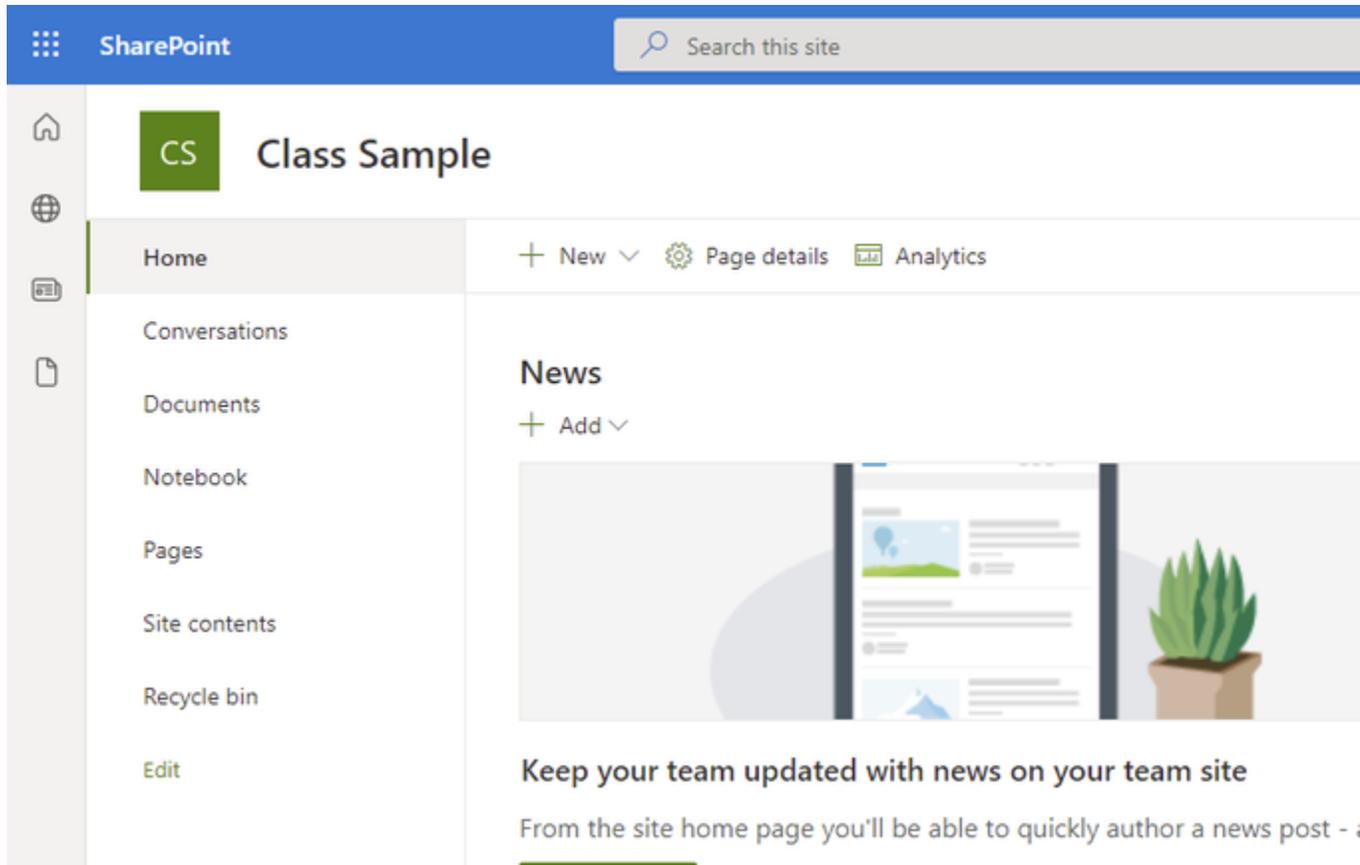
The following diagram illustrates a conceptual view of how sites might be organized in a Site Collection. Note that the presentations in this course use a root site named **Contoso Home Site** with a single child site named **Sub Site A**.



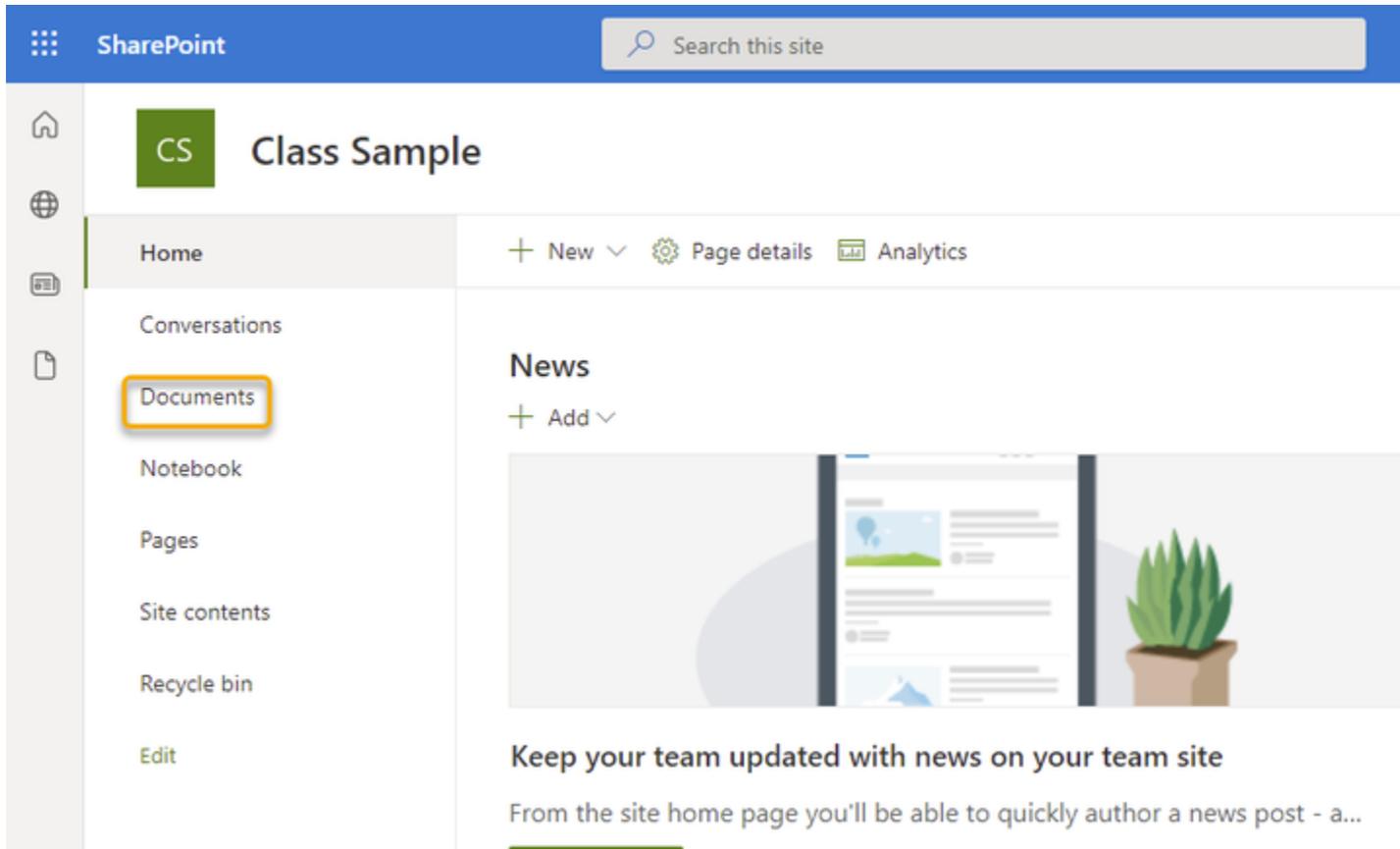
### ❖ 2.2.2. Navigation

Navigation is a crucial part of using and managing SharePoint. The following walk-through will navigate the root Team Site named **Sample Site**. The walk-through will highlight different menus and navigation links shared by all the pages in a SharePoint site.

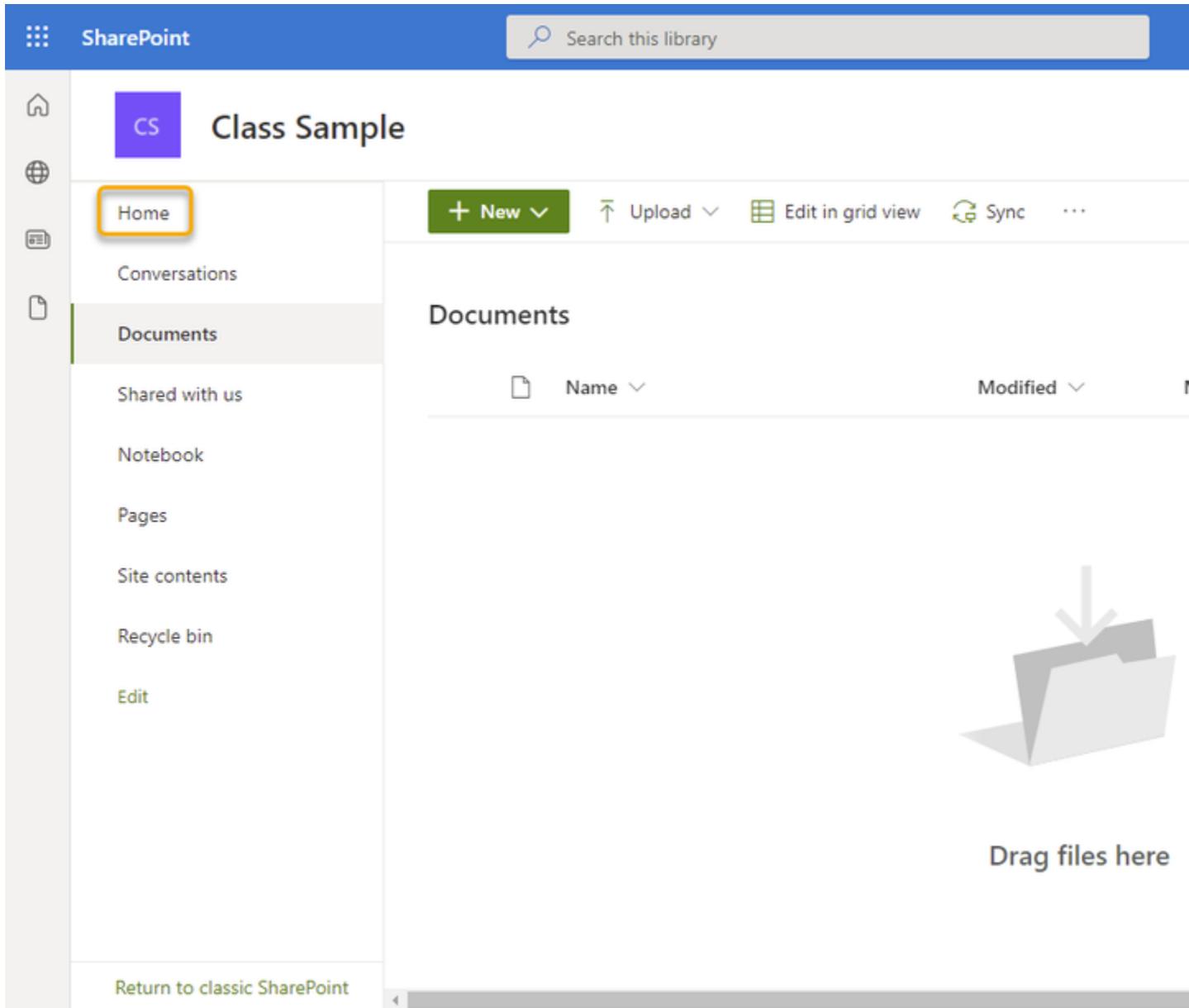
1. Navigate to your Office 365.
  - A. Launch your browser.
  - B. Log in to your Office 365.
  - C. The home page of your team site should look similar to the following:



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



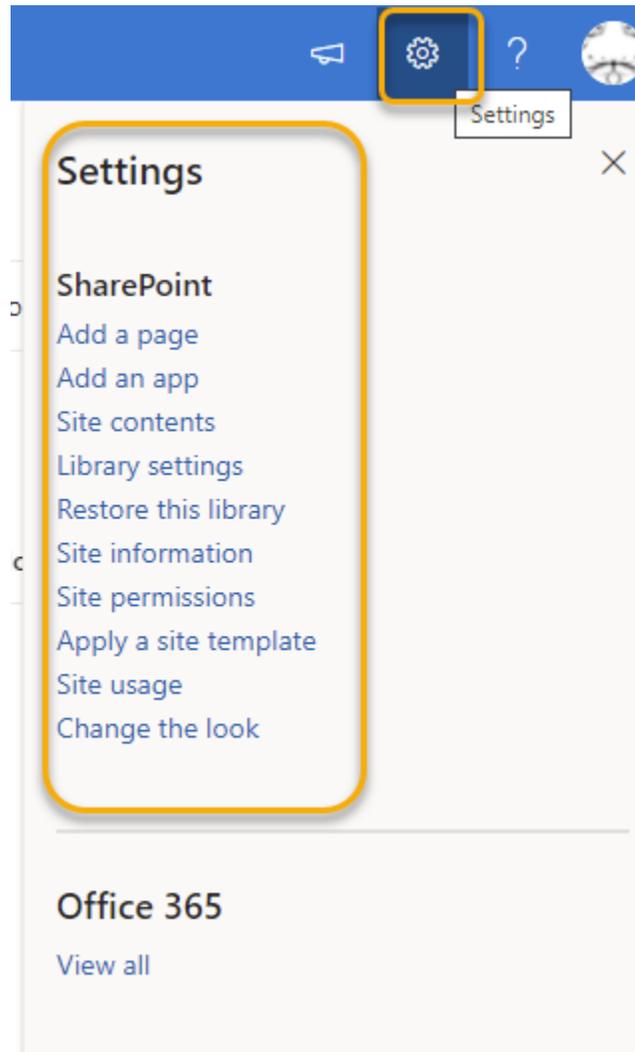
- B. Navigate back to the home page of the site by clicking the **Home** link within the **Quick Launch** menu.



### Creating Lists and Libraries

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

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



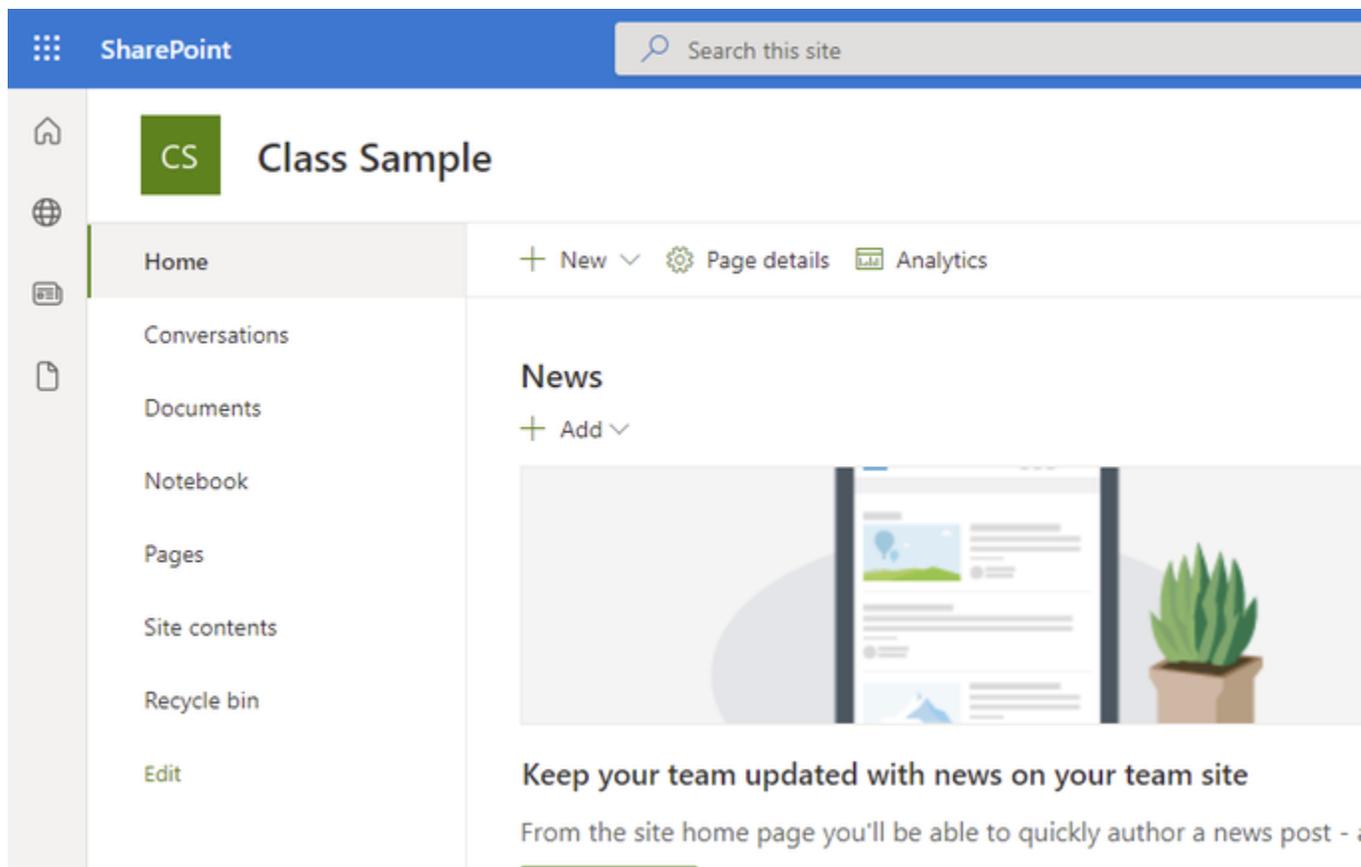
- B. Take a few moments to read through the list of links in the **Settings** menu. The items you see in the list reflect who you are logged into the site as. The list uses security trimming to show only items that you have permission to use.

# Exercise 1: Team Site Navigation (Same as above)

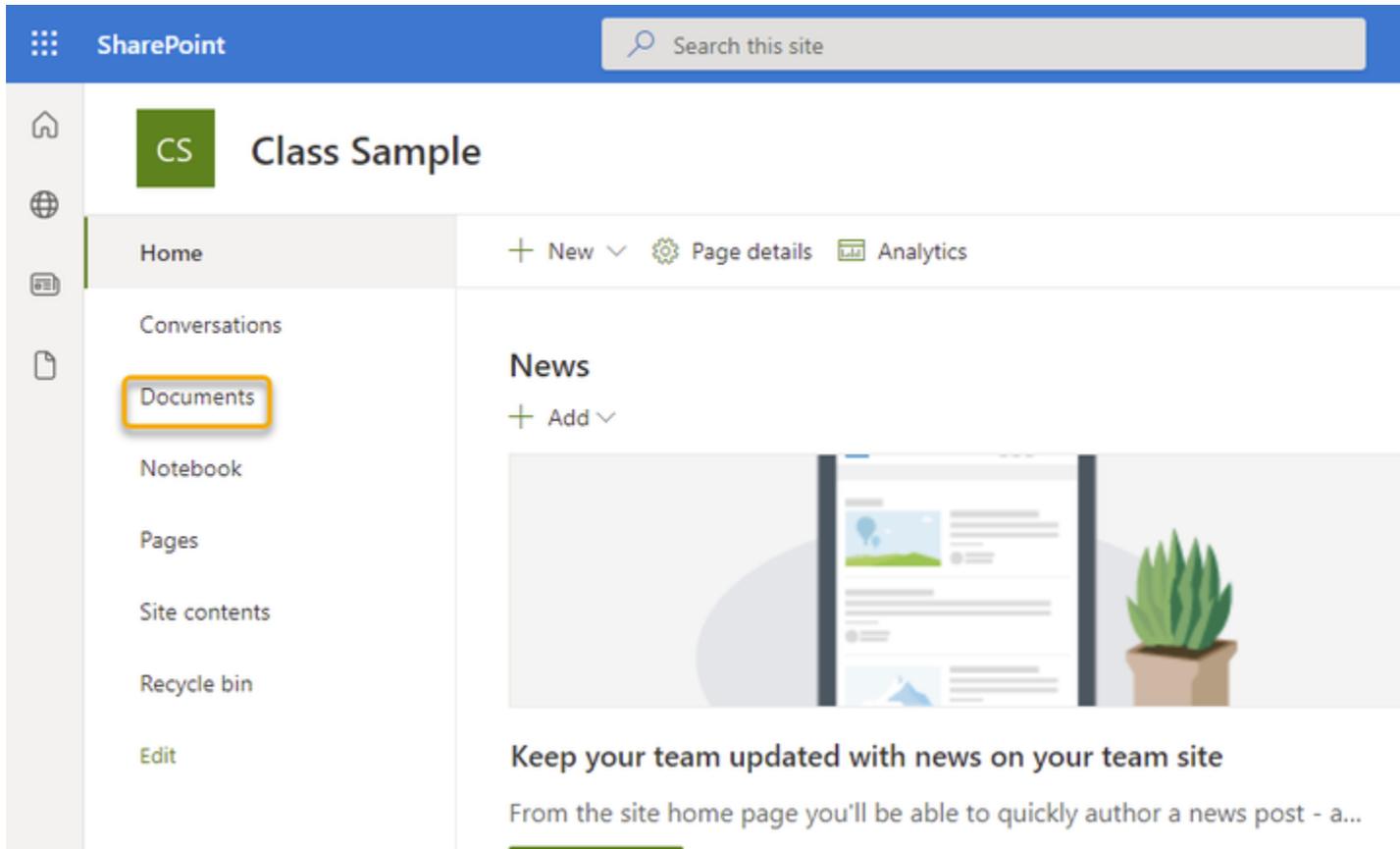
 15 to 25 minutes

In this exercise, you will learn to navigate a basic SharePoint 365 Site.

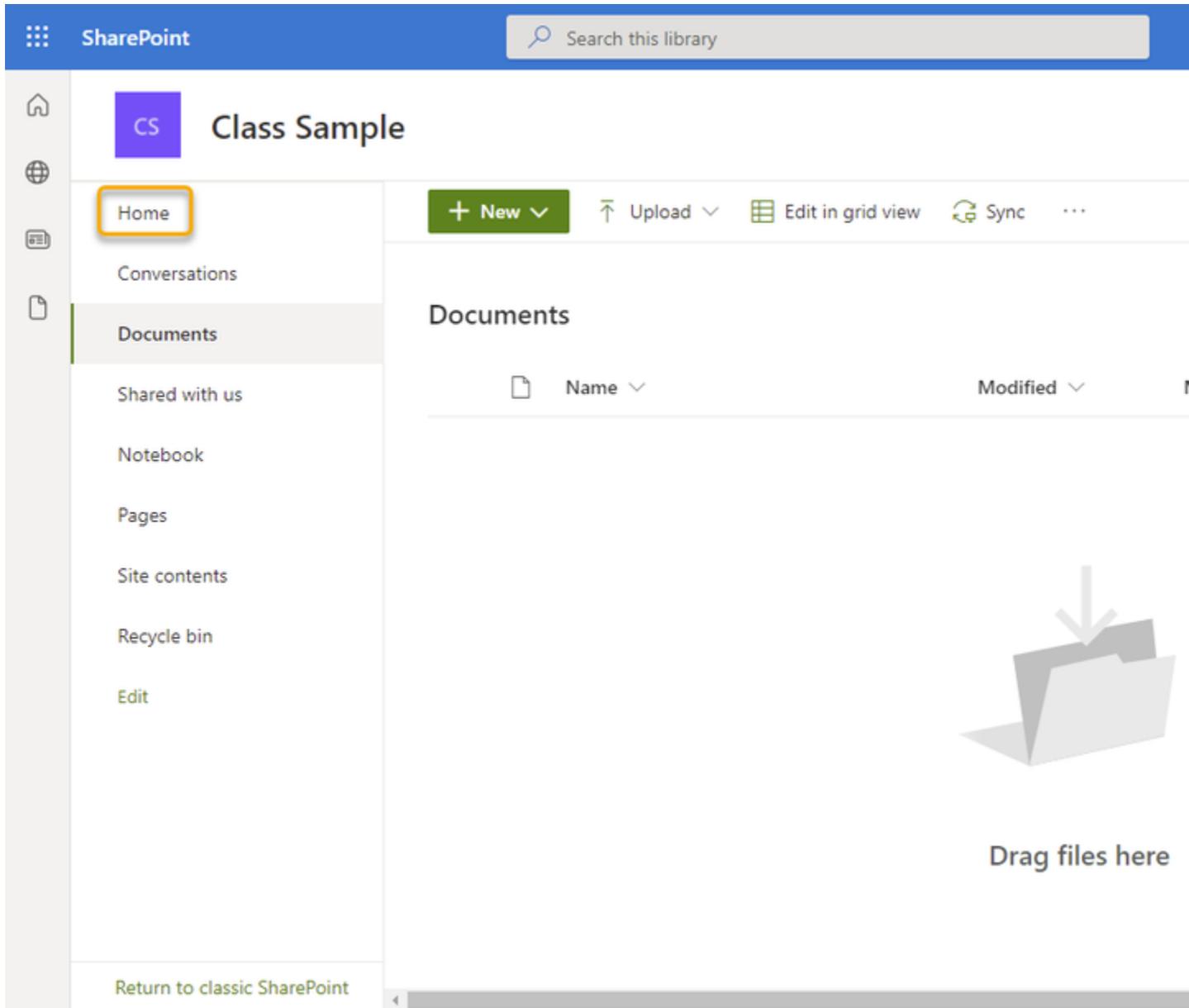
1. Navigate to your Office 365.
  - A. Launch your browser.
  - B. Log in to your Office 365.
  - C. The home page of your team site should look similar to the following:



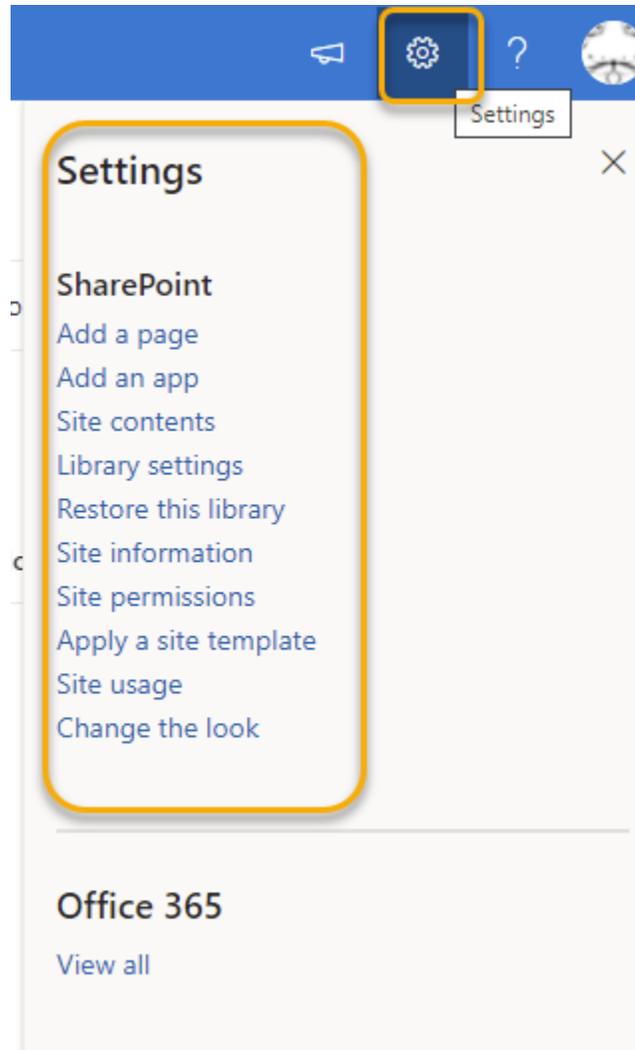
2. Navigate using the Quick Launch menu.
  - A. Select the **Documents** inside the Quick Launch menu located on the left side of the page.



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



3. 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.

## Conclusion

In this lesson, you have learned:

- About SharePoint online.
- About the basic hierarchy of a Site Collection.
- About the basic menus and toolbars in a Site.

- How to navigate within a Site.





# 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.
- Linking data from separate lists.

### Introduction

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



## 3.1. Creating Apps Using List Templates

In SharePoint 365, 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 features that have been enabled in the site. 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.



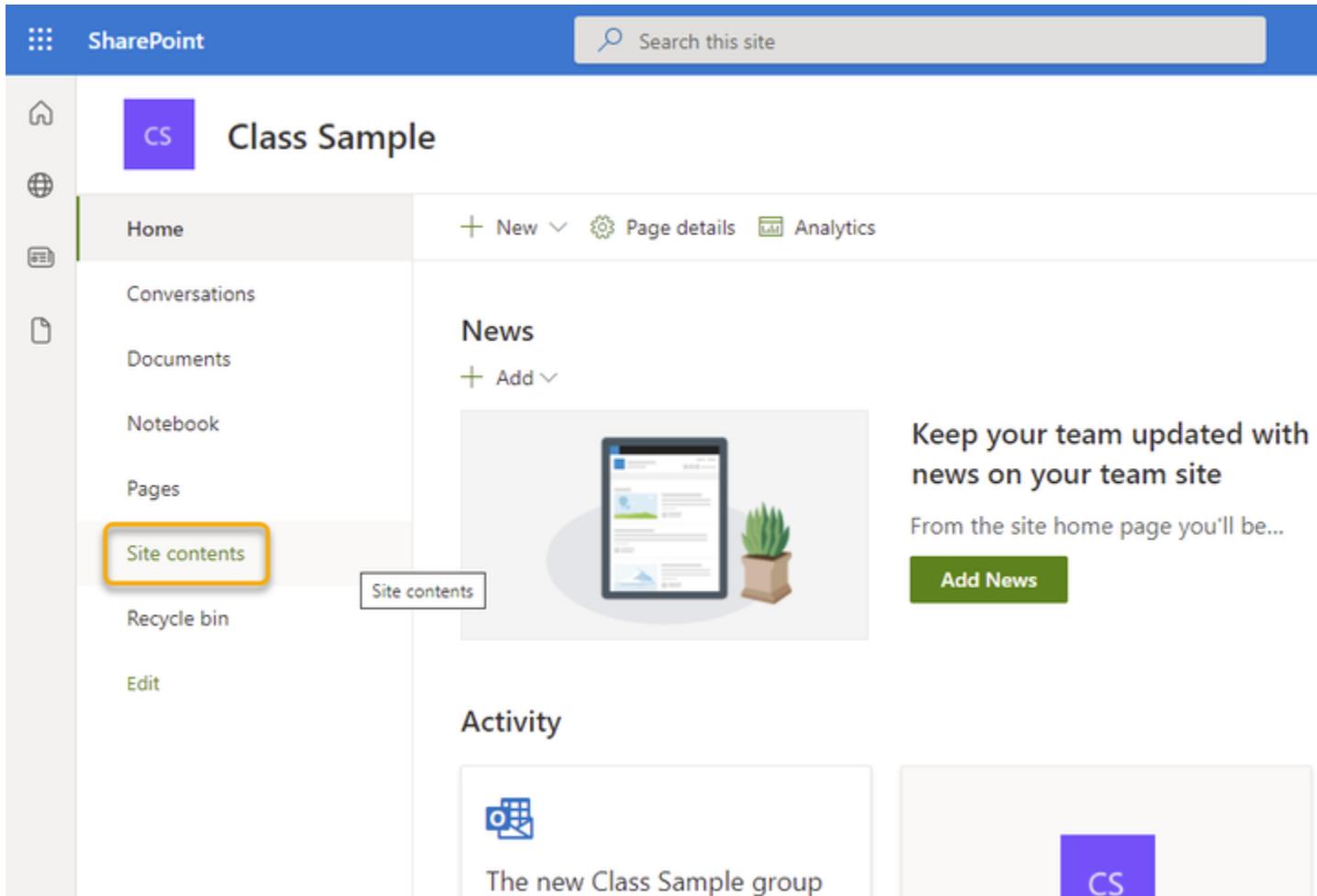
## 3.2. Creating Lists

### ❖ 3.2.1. Creating Lists Using List Templates

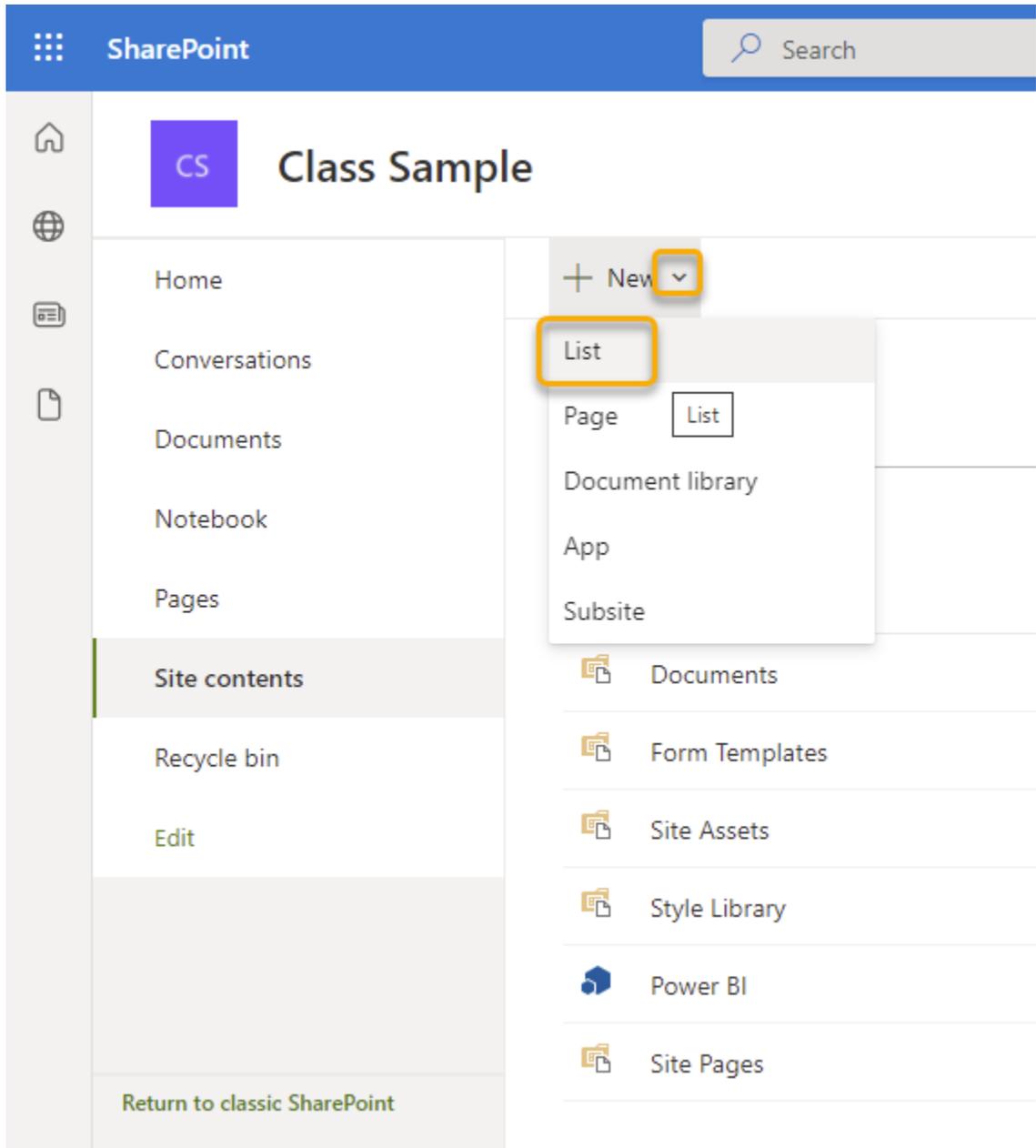
The following walk-through will show you how to create new lists.

All of the lists in this demonstration are created in the class sample site.

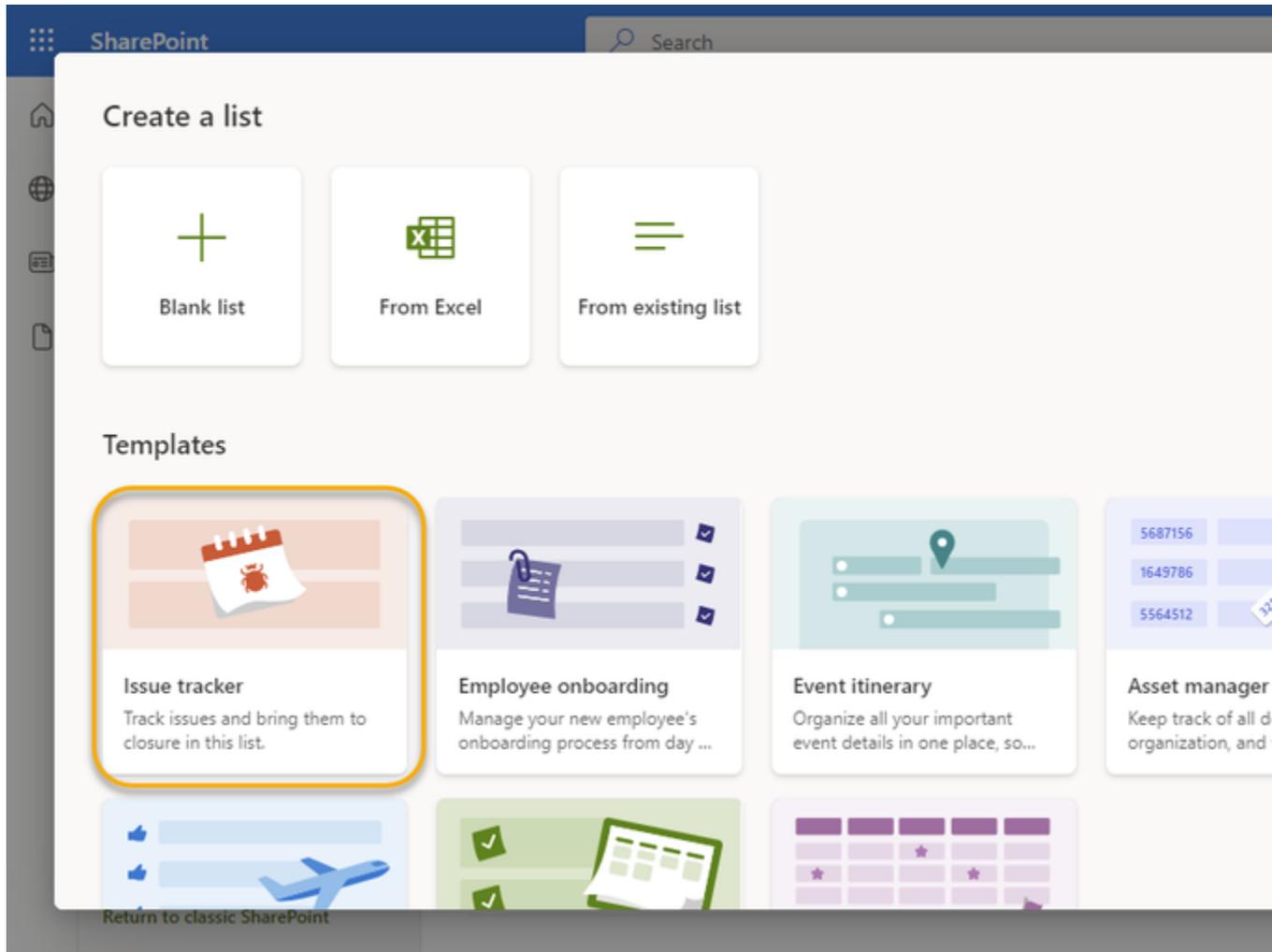
1. Create an instance of a Issue Tracker list.
  - A. Click the **Settings** menu and then choose the **Site Contents**.



B. Click **New** and choose **List** to create the list.



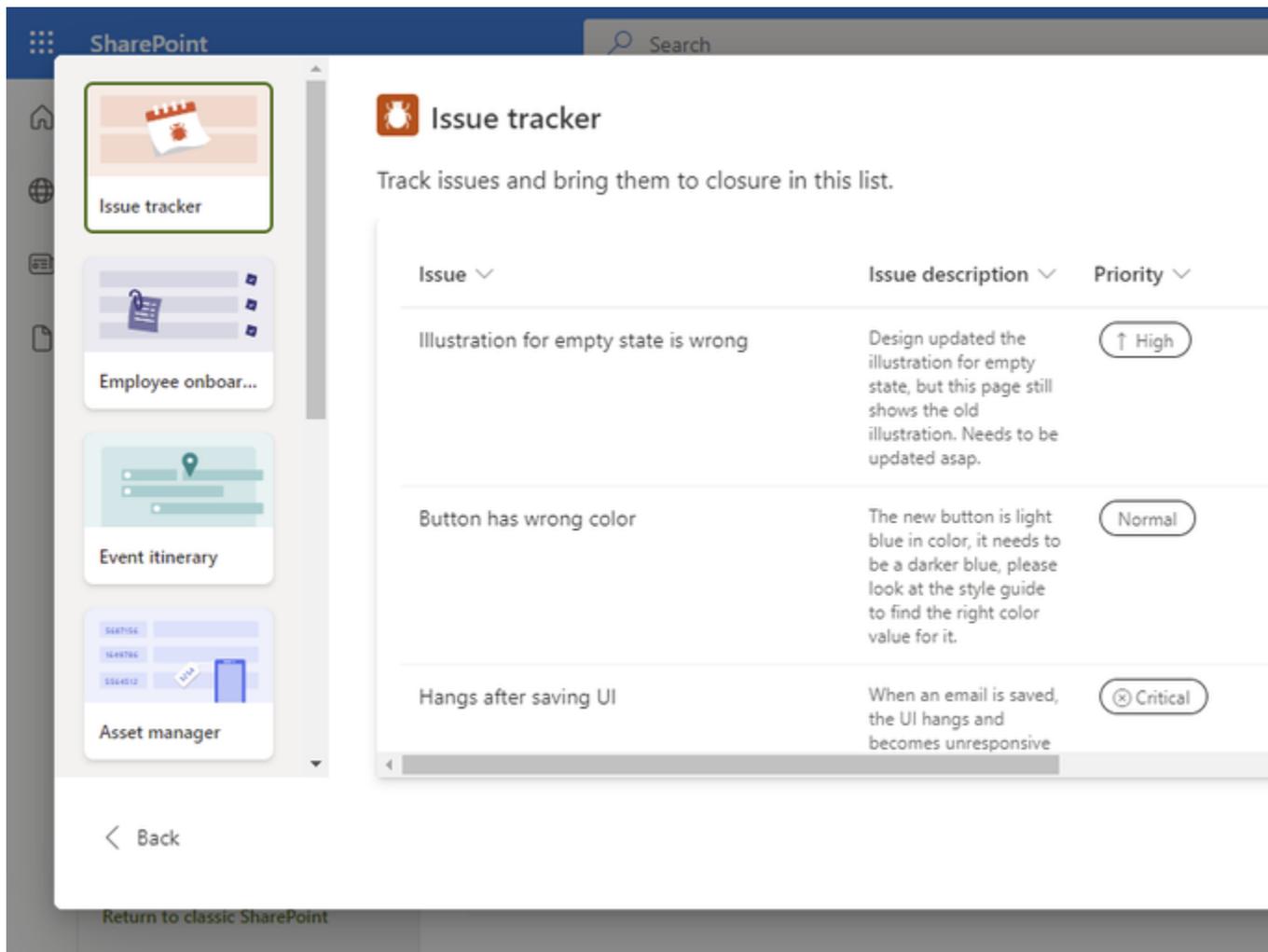
C. Click **Issue Tracker**.



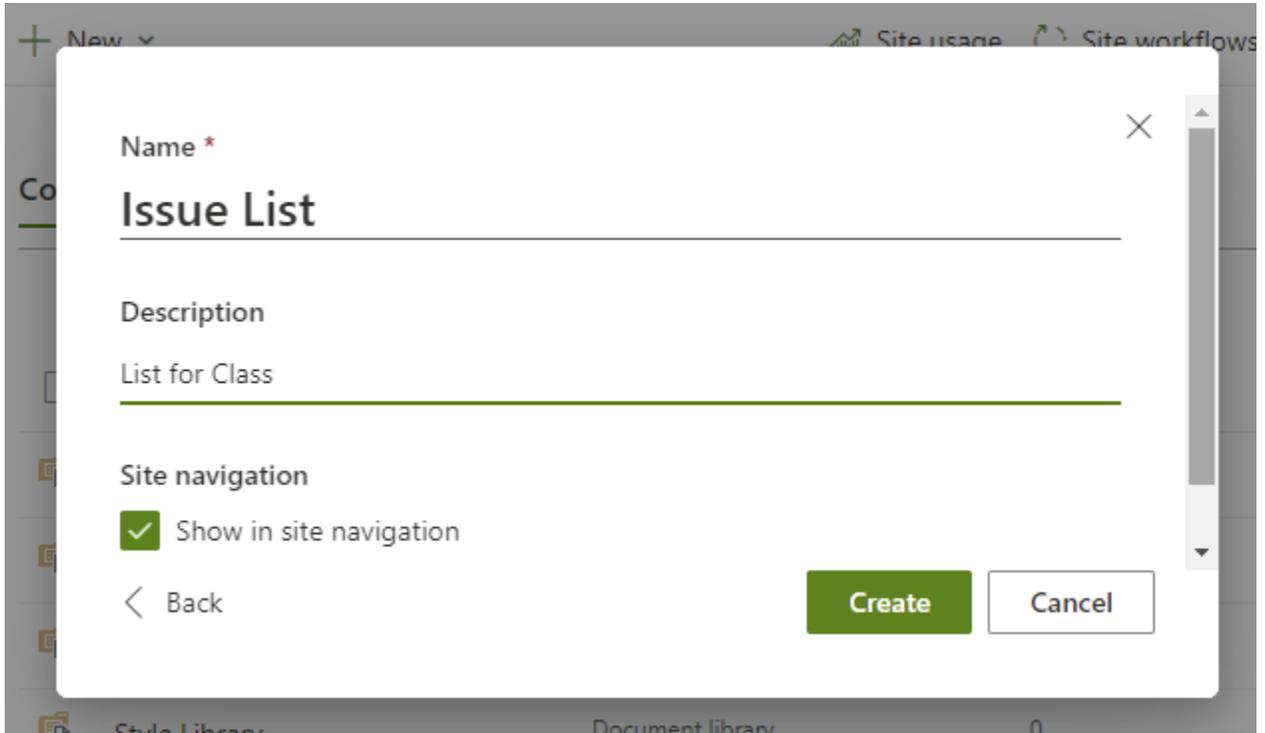
## Naming Conventions

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.

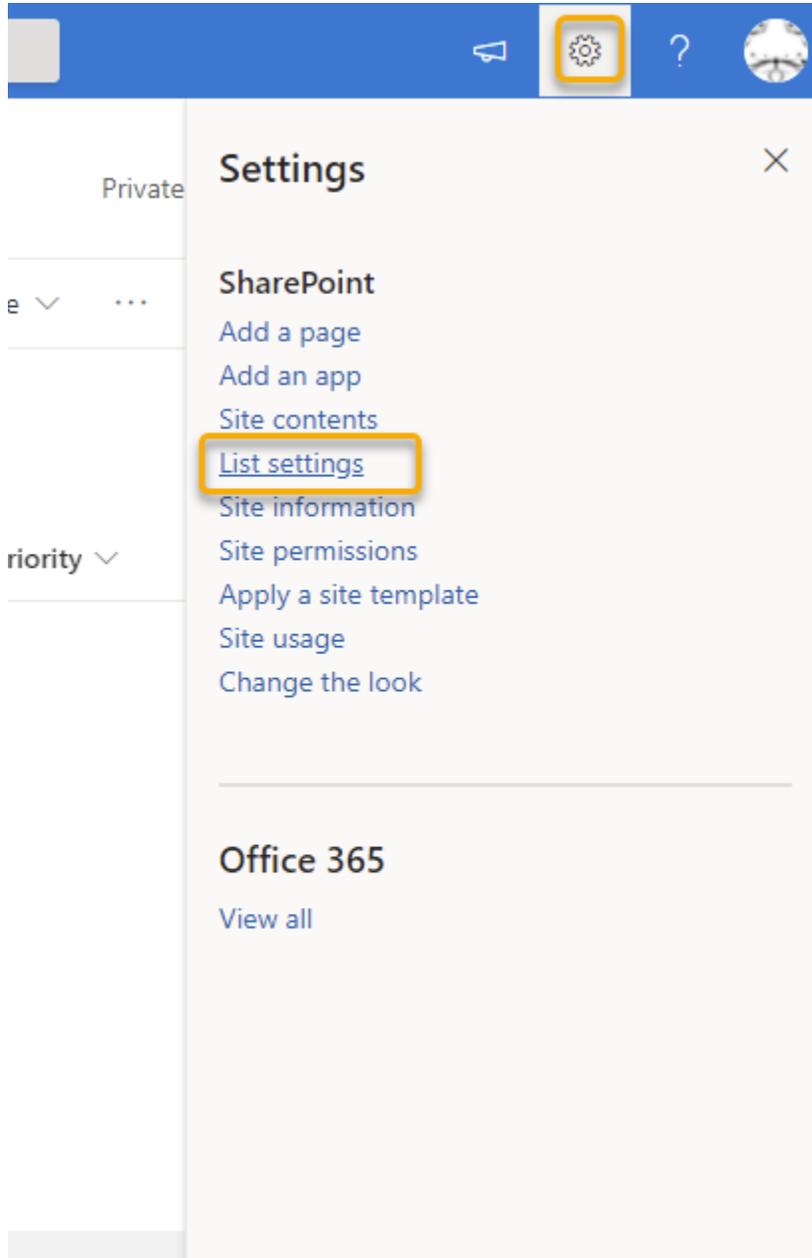
D. Click **Use Template**.



E. Type in a name "Issue List" and description "List for class". Click **Create**.



2. To review the list settings, click [Settings > List settings](#).



3. Navigate back to list.

Click Issue list to navigate back to the main list



EDIT LINKS

Issue List Settings

- Home
- Conversations
- Documents
- Notebook
- Pages
- Recent
- Issue List
- Site contents
- Recycle Bin
- EDIT LINKS

List Information

**Name:** Issue List  
**Web Address:** https://webucator.sharepoint.com/sites/ClassSample/Lists/Issue List/AllItems.aspx  
**Description:** List for Class

General Settings

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Audience targeting settings
- Rating settings
- Form settings

Permissions and Management

- Delete this list
- Permissions for this list
- Workflow Settings
- Enterprise Metadata and Keywords Settings

Columns

A column stores information about each item in the list. The following columns are currently available in this list

4. Create a new item in the list.
  - A. Click the **New** item within the **Issue List**. Use the following table to fill in the fields and click the **Save** button. Note that only the fields with an asterisk are required.

Search this list

Save Cancel Copy link

### New item

Issue \*

Enter value here

Issue description

Enter value here

Describe the issue

Priority

—

Add the priority of this issue

Status

New

Status of the issue

Assigned to

Enter a name or email address

B. In the **Issue List - New Item** form, then click **Save**.

<b>Field</b>	<b>Data</b>
Issue	Late Order
Issue Description	Didn't arrive on time.
Priority	High
Status	In progress

\*

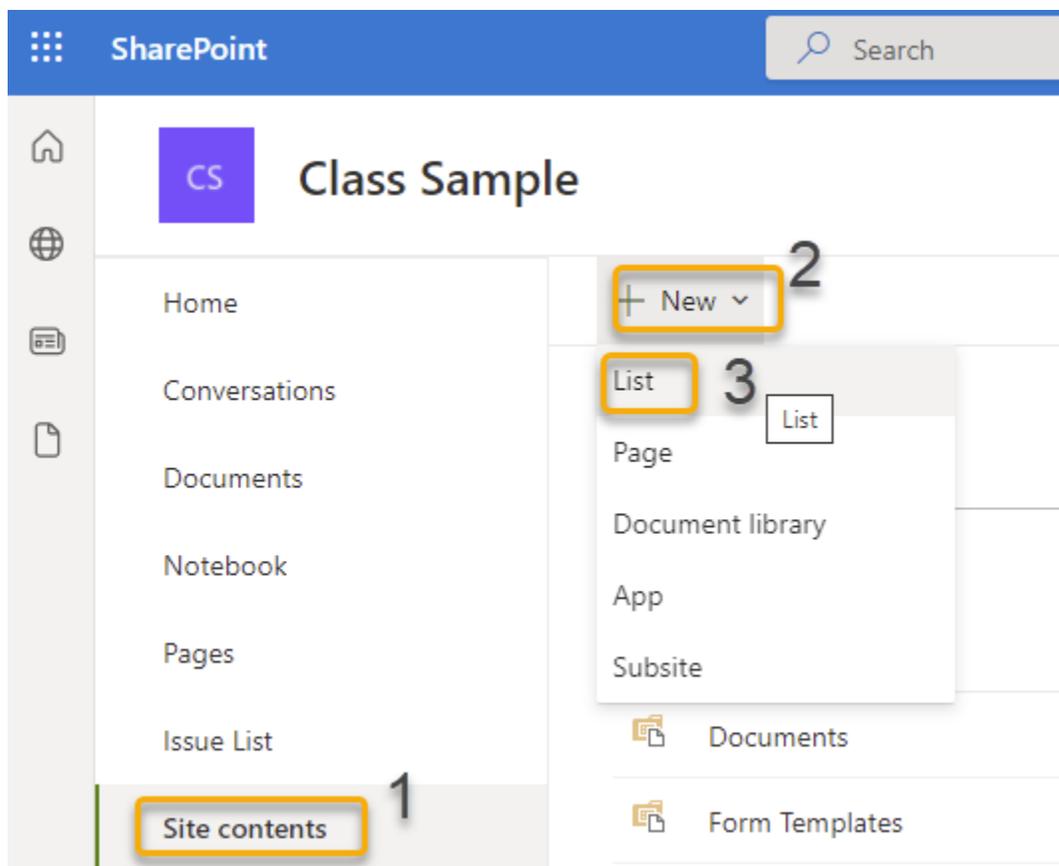
## 3.3. List Columns

Evaluation  
Copy

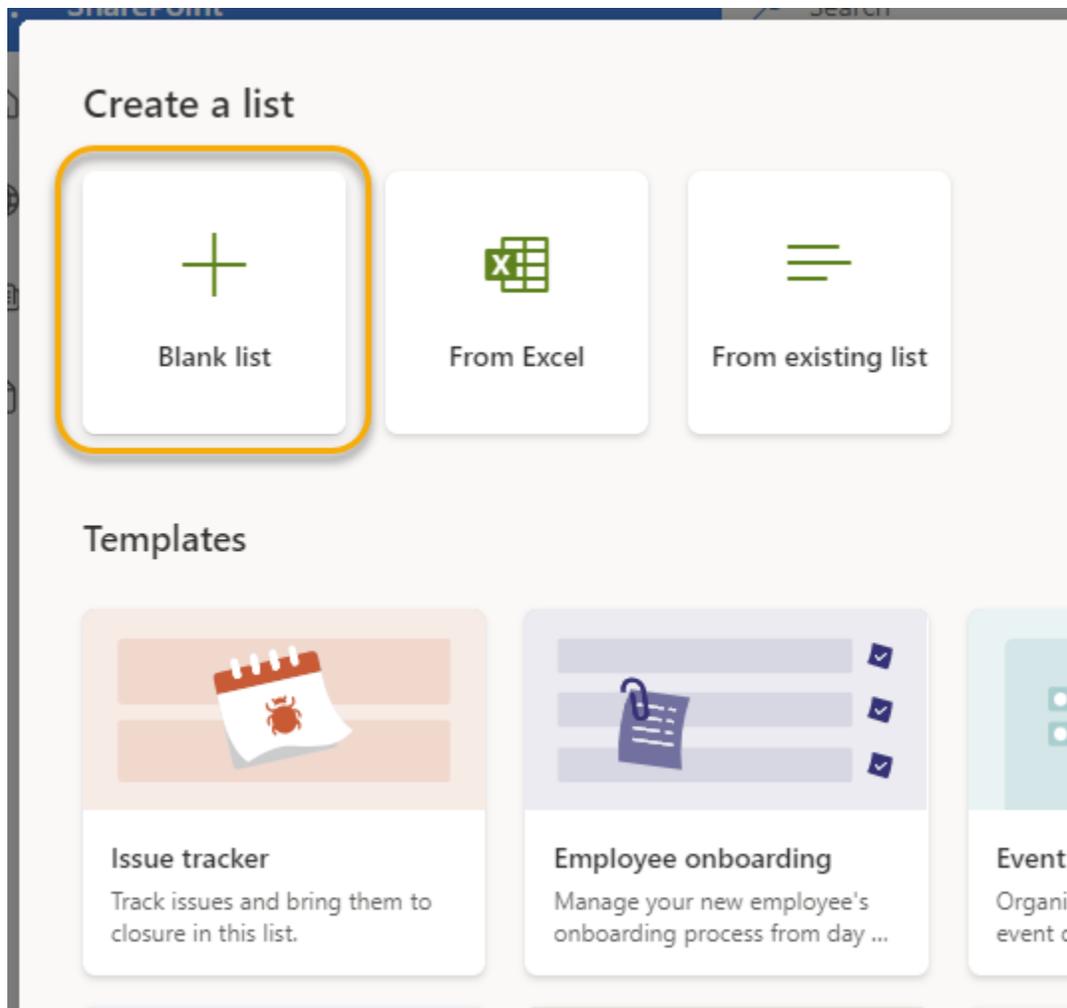
### ❖ 3.3.1. Creating List Columns

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.

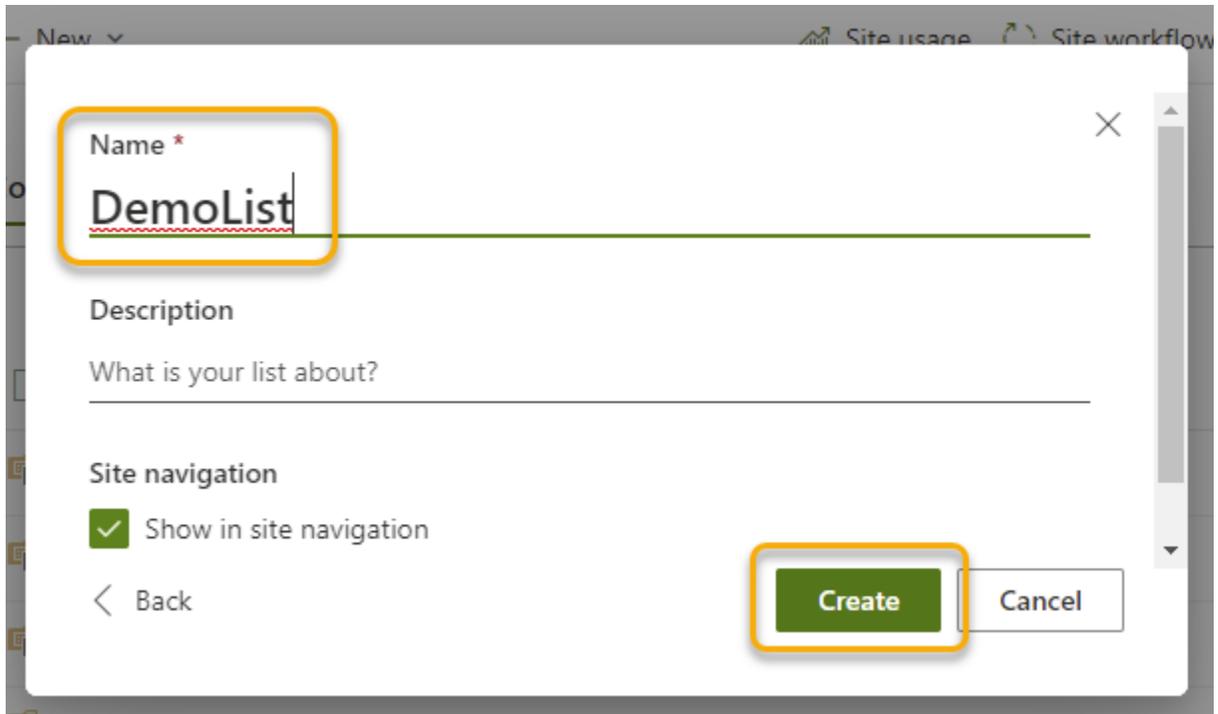
1. Create a new list in your Team Site using the **Custom List** template.
  - A. Click the **Settings** menu and then choose the **Site Contents** menu item. Click **New** and choose **List**.



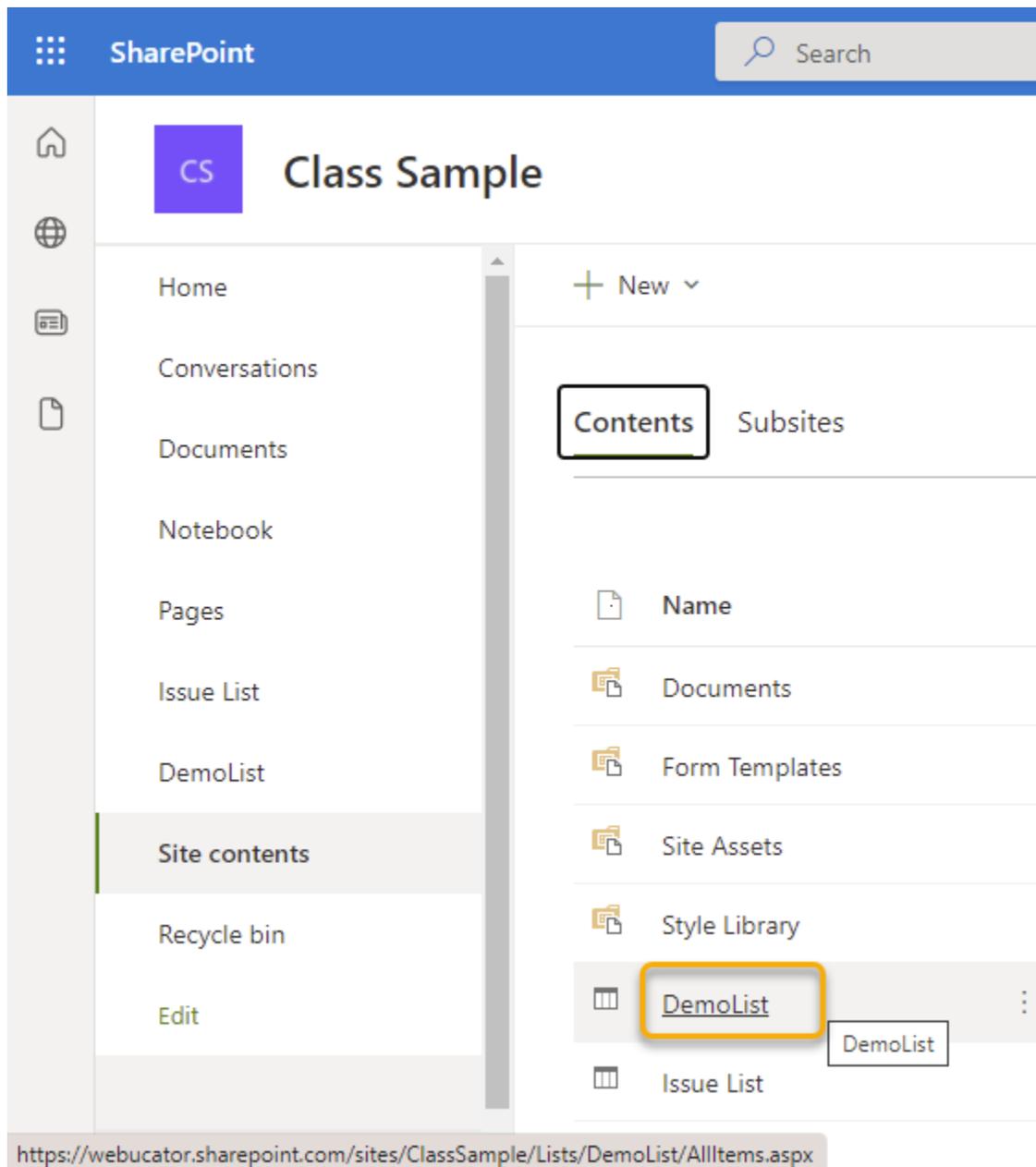
B. Select the **Blank List** template from the list of available templates.



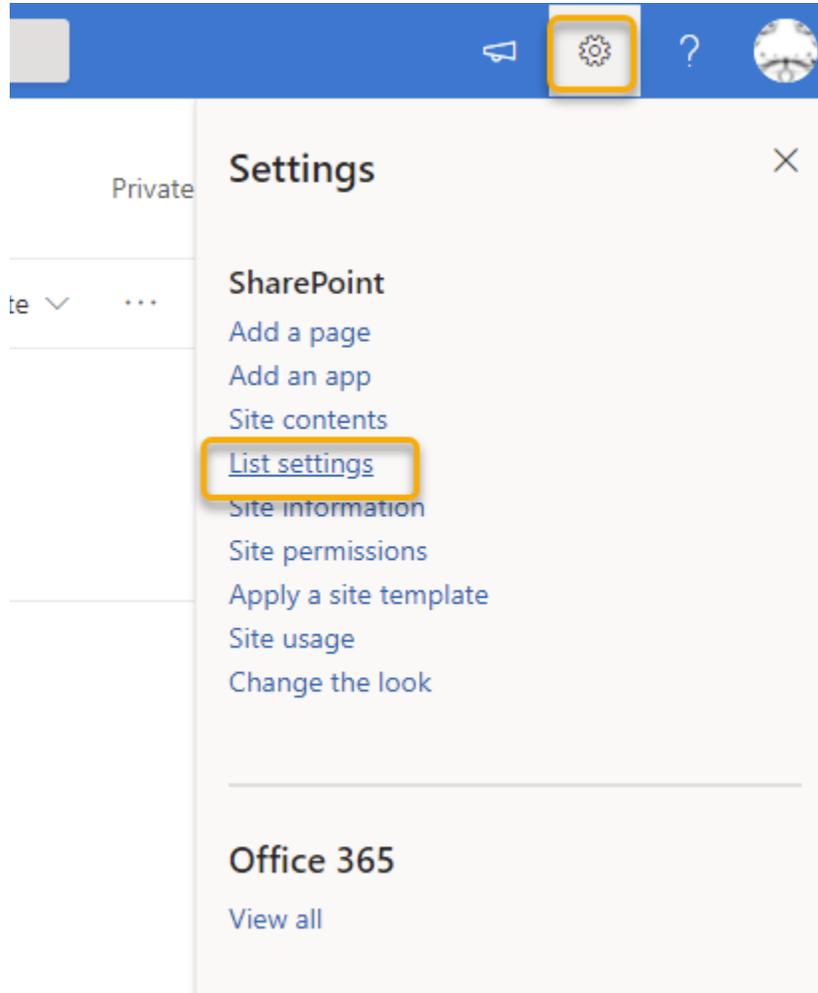
C. Enter “DemoList” in the **Name** field and then click the **Create** button.



2. Add a new **Single line of text** list column to **Demo List**.
  - A. Click the **Demo List** link in the **Site contents** if needed.



- B. Click the **List Settings** on the **Settings** to open the lists options. NOTE: If you use a different template or Classic layout you may need to click the List tab, List settings.



C. Click the **Create Column** button under the **Columns** category.

EDIT LINKS

Form settings

### Columns

A column stores information about each item in the list. The following columns are curr

Column (click to edit)	Type
Title	Single line of text
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group

[Create column](#)

- Add from existing site columns
- Column ordering
- Indexed columns

### Views

- D. Enter “Item Description” 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**.



EDIT LINKS

# Settings ▸ Create Column ⓘ

Home

Conversations

Documents

Notebook

Pages

Recent

Issue List

DemoList

Site contents

Recycle Bin

EDIT LINKS

## Name and Type

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

Column name:

Item Description

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)
- Image
- Task Outcome
- External Data
- Managed Metadata

- 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 under the Columns category.
  - B. Enter “Item Category” in the **Column name** field and change **The type of information in this column is:** option field to **Choice**.
  - C. In the **Additional Column Settings** region, type some colors into the field labeled **Type each choice on a separate line** and change the **Display choices using** field to **Radio Buttons**. See the following image for some suggested colors to add:

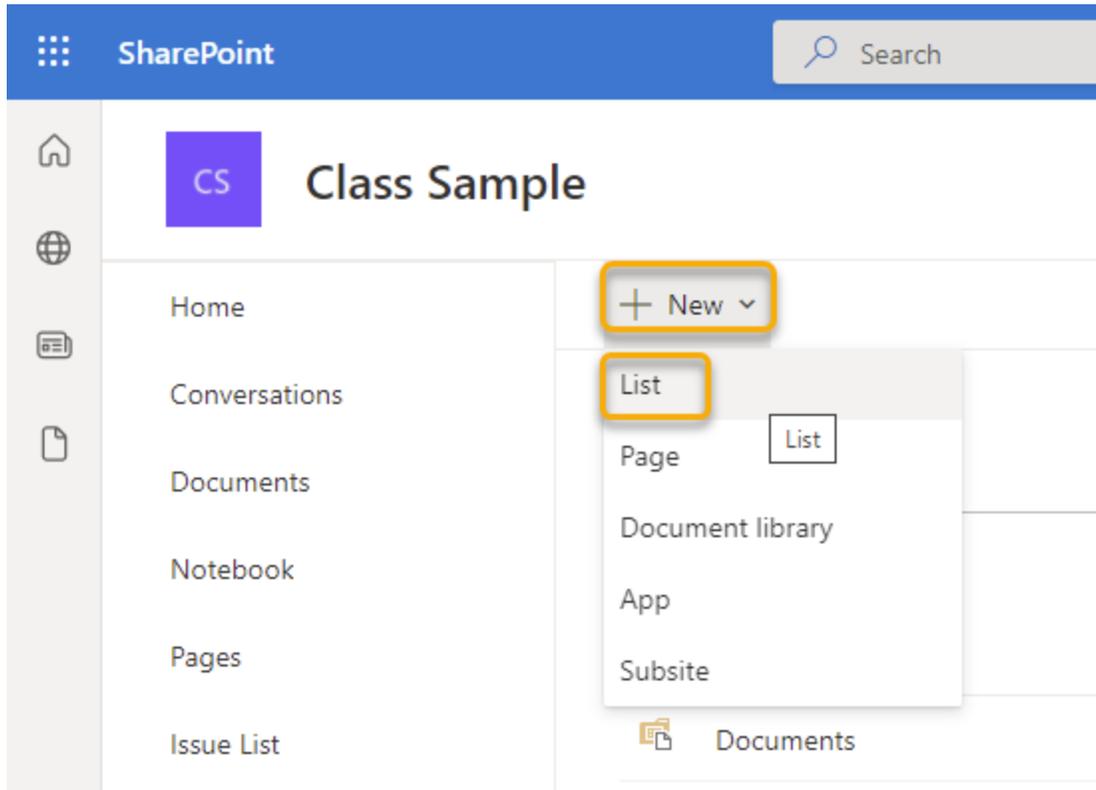
## Display choices using Options

Note the **Display choices using** options that include **Radio Buttons** and **Check Boxes**. The check boxes allows for multiple choices (note that this feature may limit the view options) and the radio buttons provide 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.

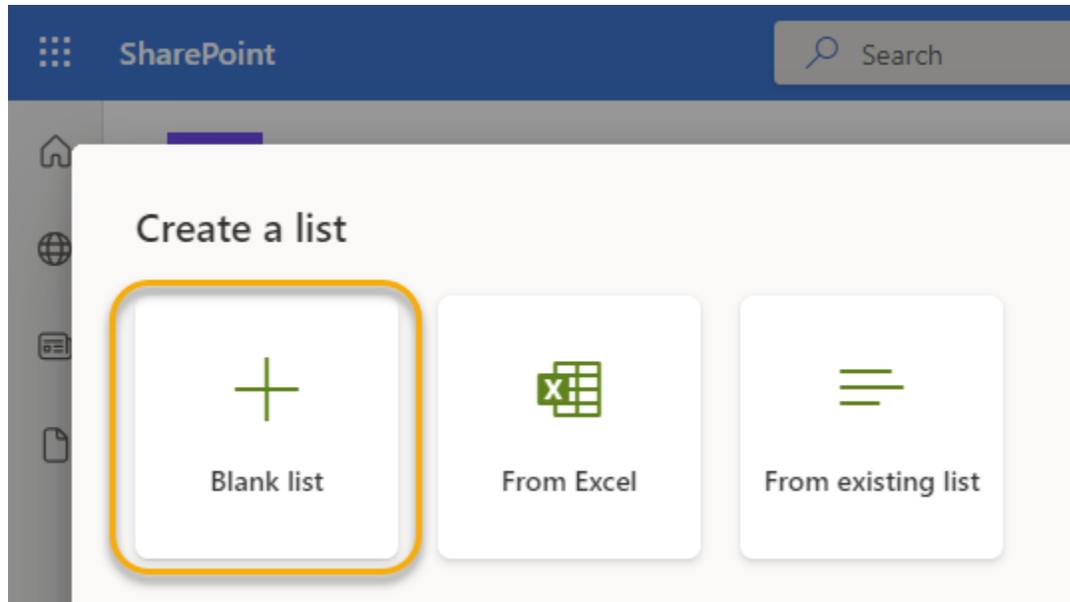
- D. Click the **OK** button to complete creating the new list column.
4. Add a new **Date and Time** list column to **Demo List**.
    - A. Click the **Create Column** button under the Columns category.
    - B. Enter “Order Date” in the **Column name** field and change **The type of information in 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 under the Columns category.
    - B. Enter “Ordered By” 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. Create a new list in your Team Site using the **Custom List** template.
    - i. Click the **Settings** menu and then choose the **Site Contents** menu item. Click **New** and choose **List**.

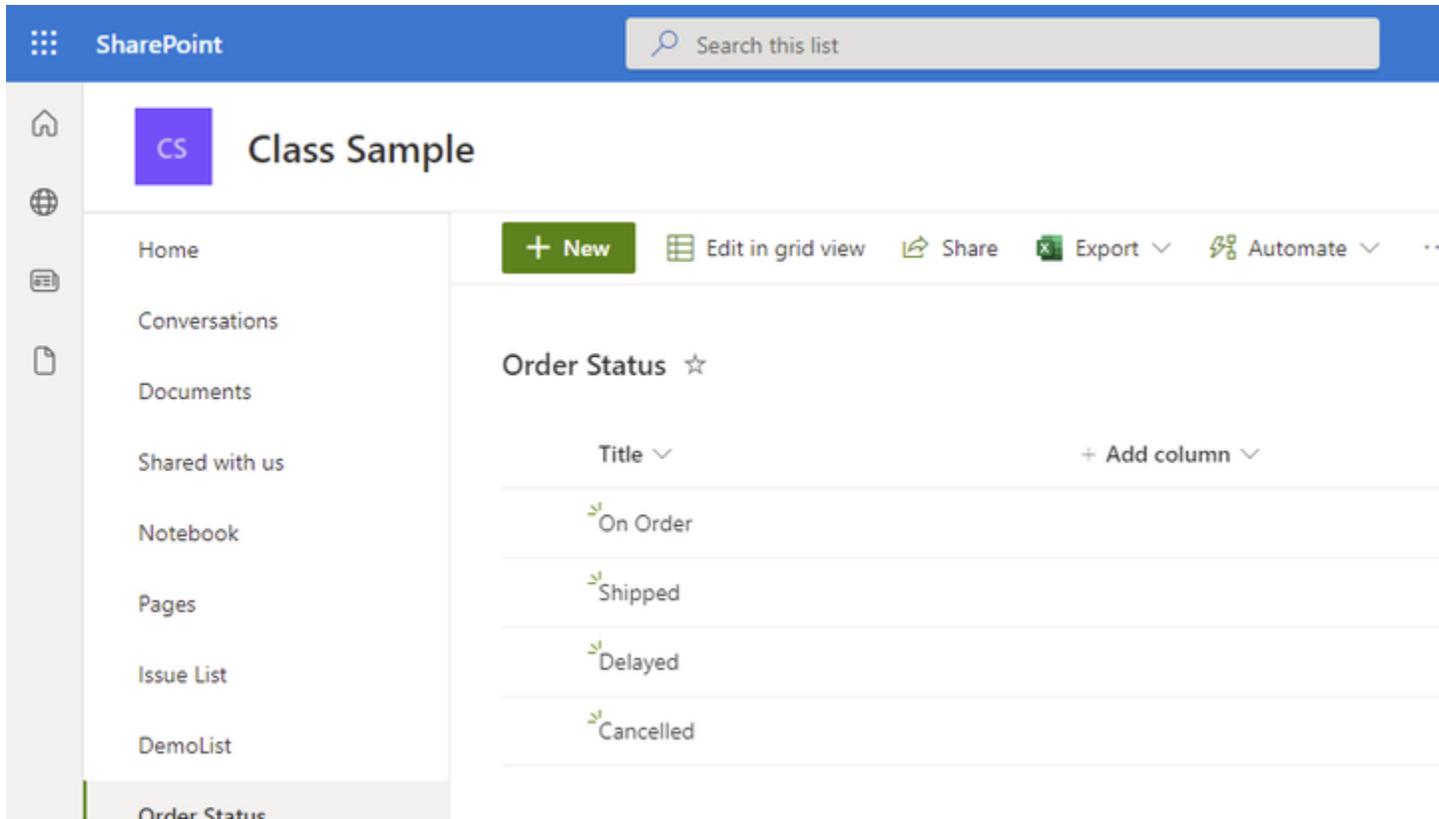


- ii. Select the **Blank List** template from the list of available templates.

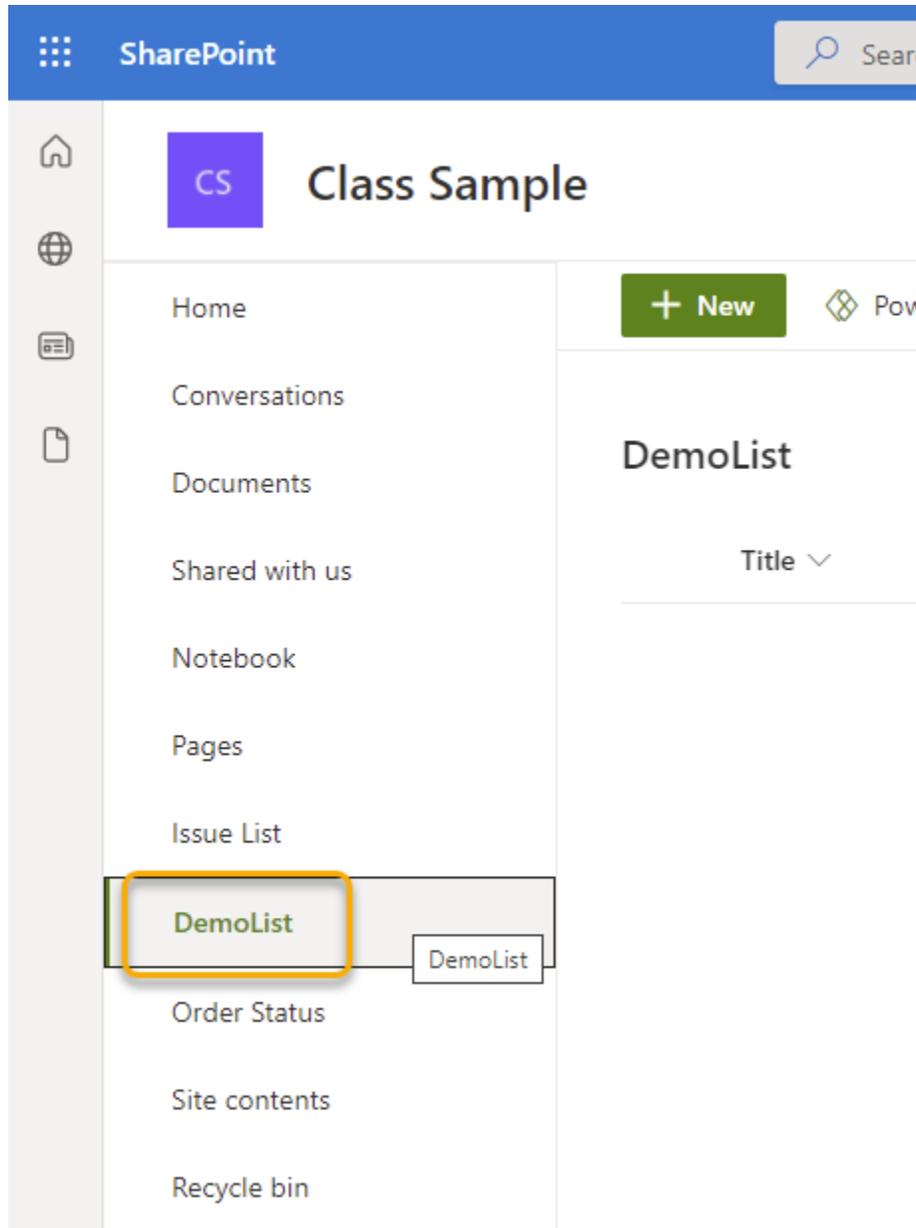


iii. Enter “OrderStatus” in the **Name** field and then click the **Create** button.

- B. Click the **Order Status** link in the **Site Contents**.
- C. Click the **new** link in the **OrderStatus** list.
- D. Enter “On Order” in the **Title** field text box.
- E. Click the **Save** button to save the new **Order Status** item.
- F. Repeat the previous steps to create the following **Order Status** items:



G. Click the **Demo List** link in the **Site Contents**.



- H. Click the **List Settings** on the **Settings** to open the lists options.
- I. Click the **Create Column** button under the Columns Category.
- J. Enter "Order Status" 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)**.

### 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

Get information from:

Order Status ▼

In this column:

Title ▼

Allow multiple values

Add a column to show each of these additional fields:

ID

Title

Modified

Created

Version

Title (linked to item)

Compliance Asset Id

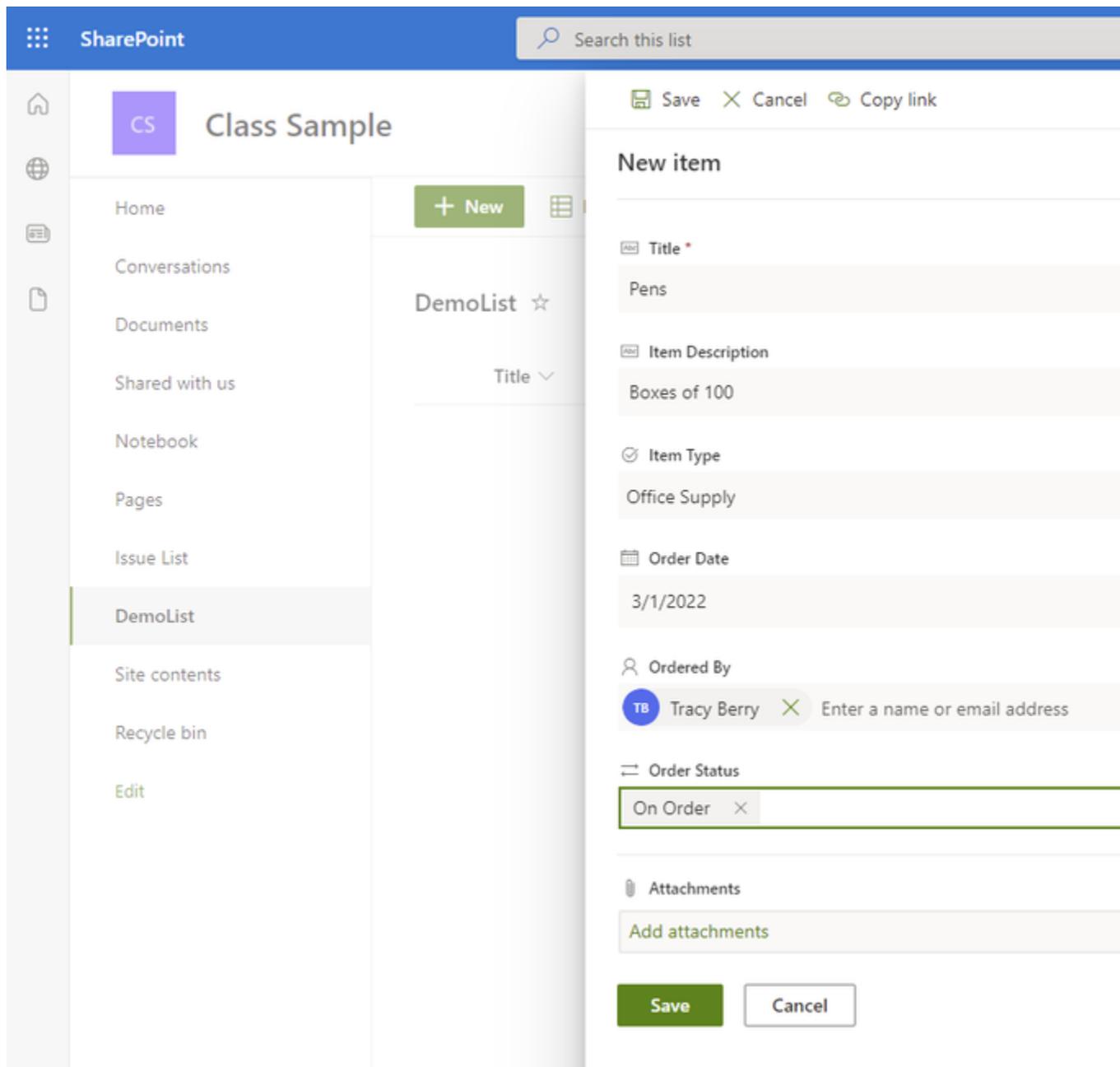
Add to default view

Column Formatting:

Change the display of this column by adding JSON be

Remove the text from the box to clear the custom for

- K. Click the **OK** button to complete creating the new list column.
7. Create a sample item in the new **Demo List** to test the results of the custom columns.
  - A. Click the **new** 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 **Ordered By** field data to an account name that exists in your SharePoint installation.



### The Who Field

For the **Order By** field, you can optionally click a name from the drop-down list that SharePoint provides. Try your identity. NOTE: If you are missing

any fields - such as Attachments, you may be using a different template or the settings may not allow for attachments.

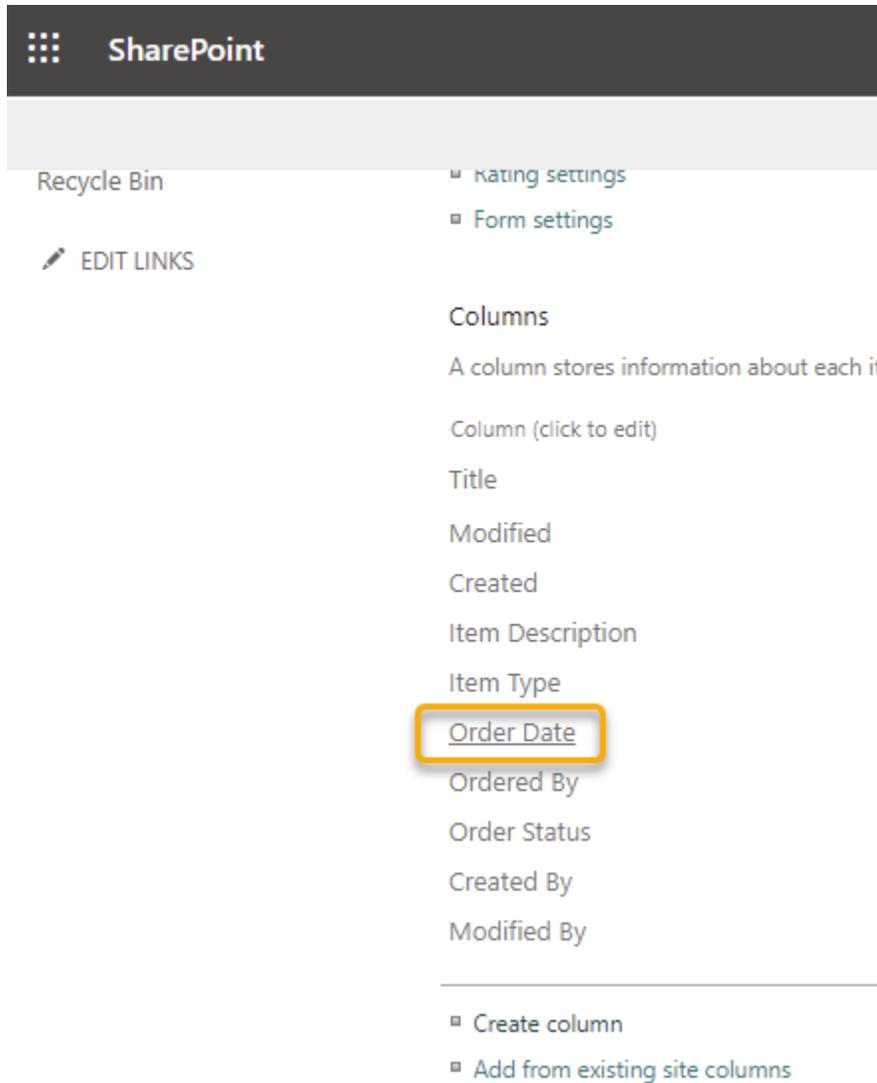


## 3.4. Column Validation

### ❖ 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 **Order Date** 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 Settings** on the **Settings** to open the lists options.
  - C. Click the **Order Date** 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 `= [Order Date] >= Today()` in the **Formula** field and The Order Date must be later than the current date. in the **User message** field.

### Column Validation

Specify the formula that you want to use to validate the data in this column when new items are saved to this list. The formula must evaluate to TRUE for validation to pass.

Example: If your column is called "Company Name" a valid formula would be [Company Name]="My Company".

Learn more about proper syntax for formulas.

Formula:

=[Order Date]>=TODAY()

Type descriptive text that explains what is needed for this column's value to be considered valid.

User message:

The Order Date must be later than or equal to the current date.

Delete

OK

Cancel

### Date Formula

The formula in this example will ensure that the user cannot enter a date that is before 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** link within the **Demo List** to create a new item.
    - C. In the required **Title** field, enter "Testing" and select a past date in the **Order Date** field.
    - D. Click the **Save** button. You should get a validation error message similar to the following image:

Save Cancel Copy link

**Error:** The Order Date must be later than or equal to the current date.

Title \*

Testing

Item Description

Enter value here

Item Type

Office Supply

Order Date

3/16/2022

The Order Date must be later than or equal to the current date.

Ordered By

Enter a name or email address

### Error Message

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.

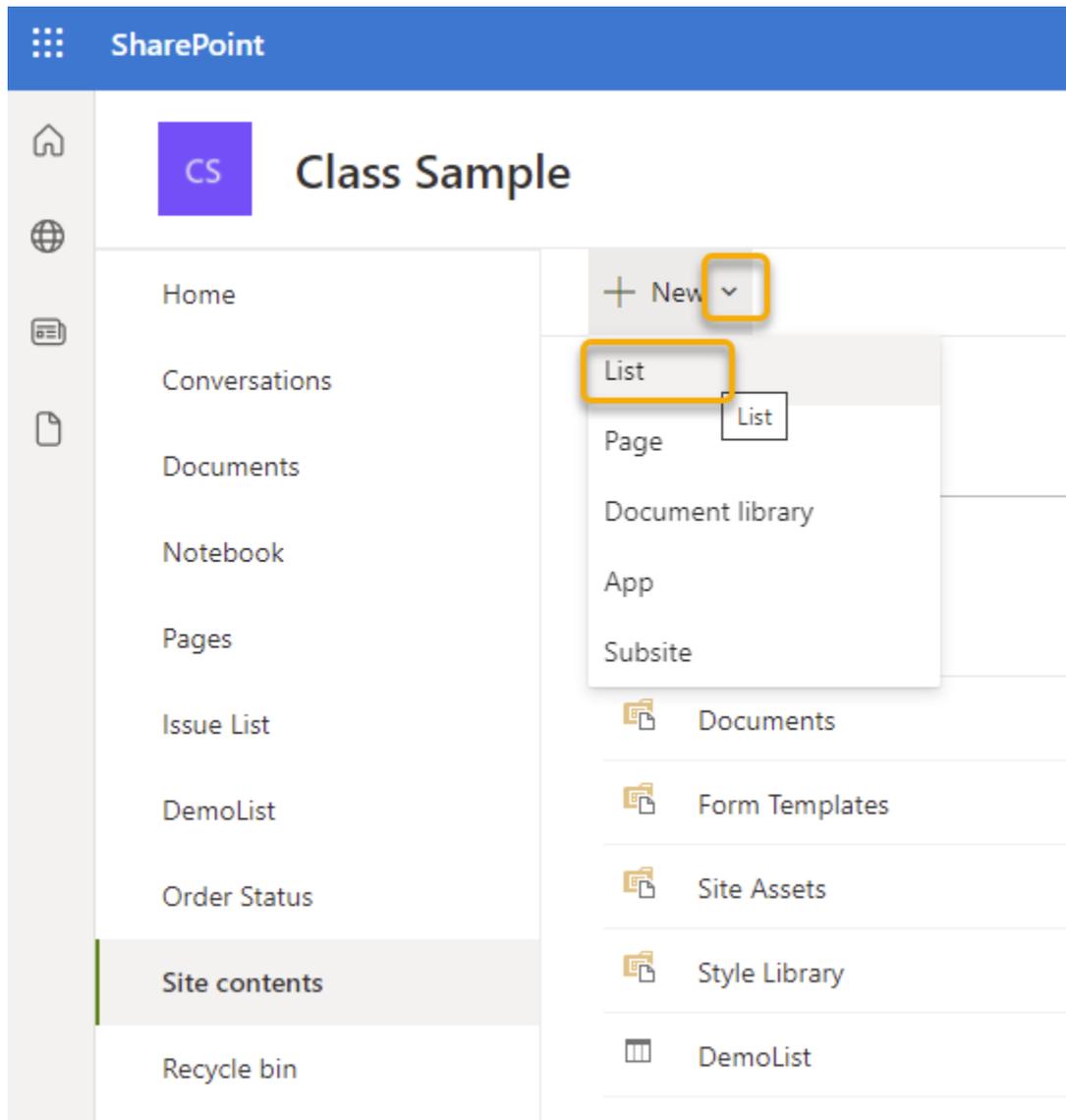
- E. Change the **Order Date** date field to a date a future or the current date and click the **Save** button. The new item should be saved and displayed in the list.

# 📄 Exercise 2: Working with Team Site Lists

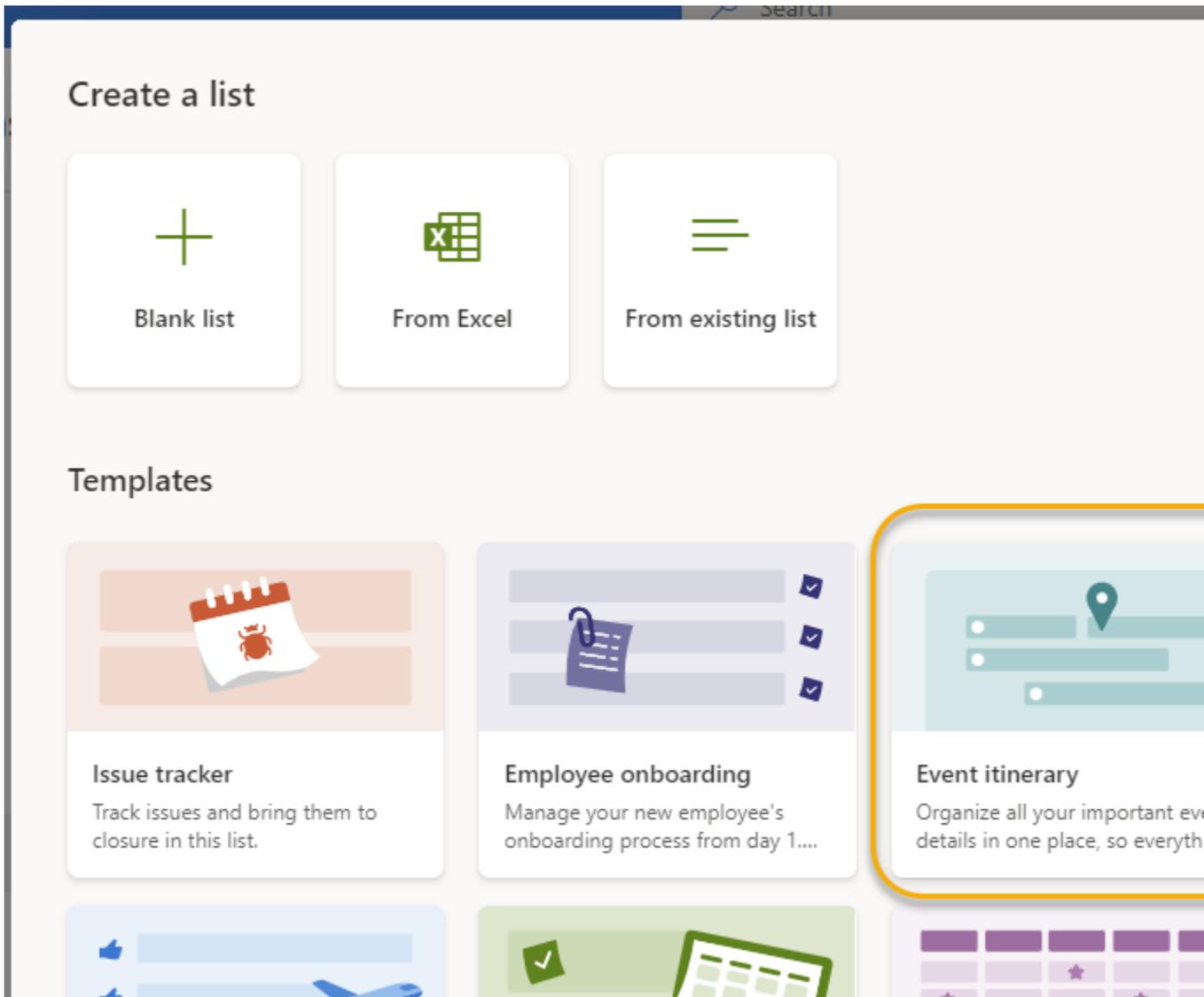
🕒 10 to 15 minutes

In this exercise, you will work with some of the default list templates in SharePoint 365.

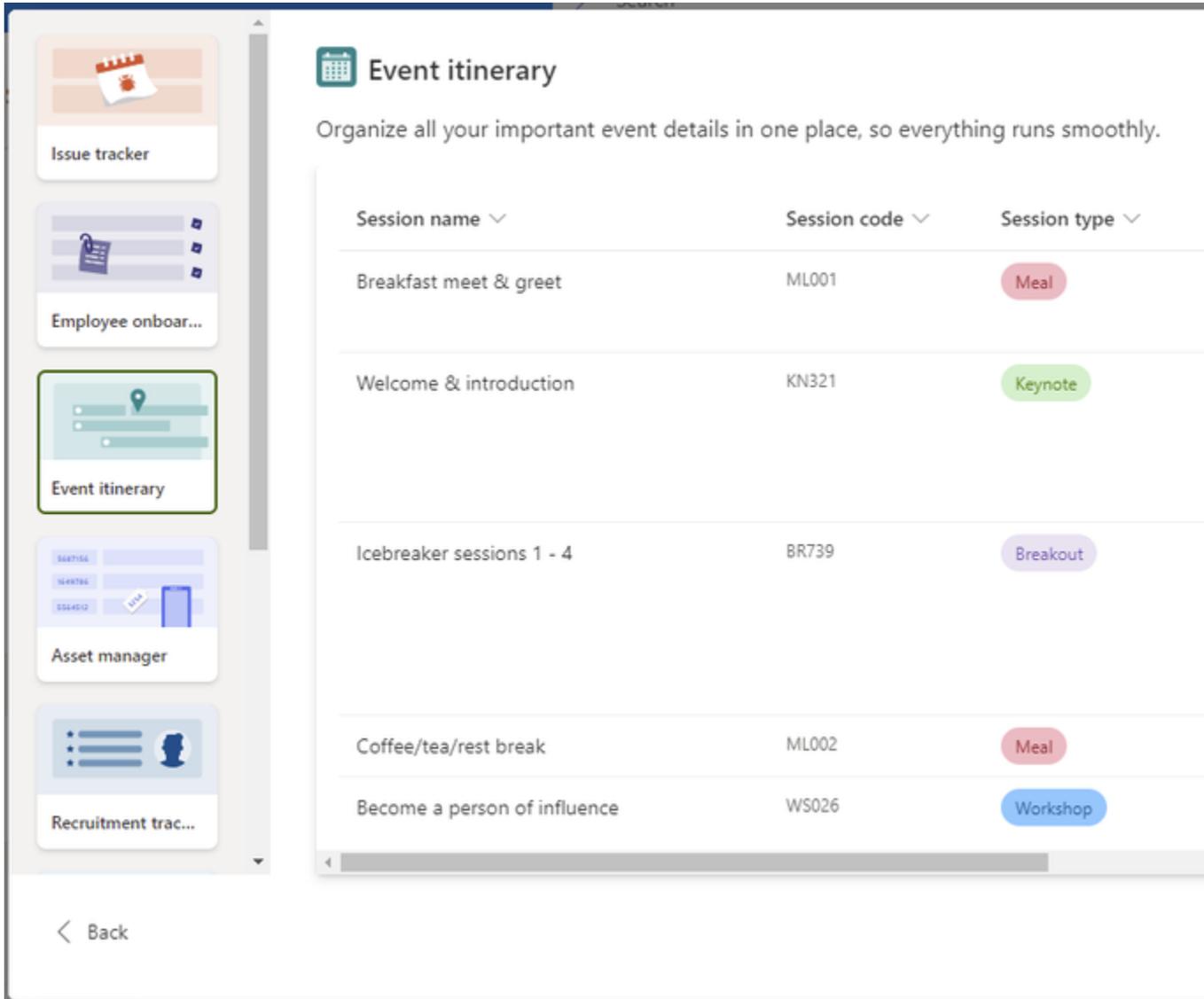
1. Create a new Event Itinerary list.
  - A. Click the **Settings** menu and then choose the **Site Contents** menu item. Click **New** and choose **List**.



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



- C. Review options and click the **Use Template** button.



- D. Type in "Corp Events" as the name. Make sure Check mark is on for **Show Site in Navigation** and click **Create**.

Name \*

Corp Events

Description

What is your list about?

Site navigation

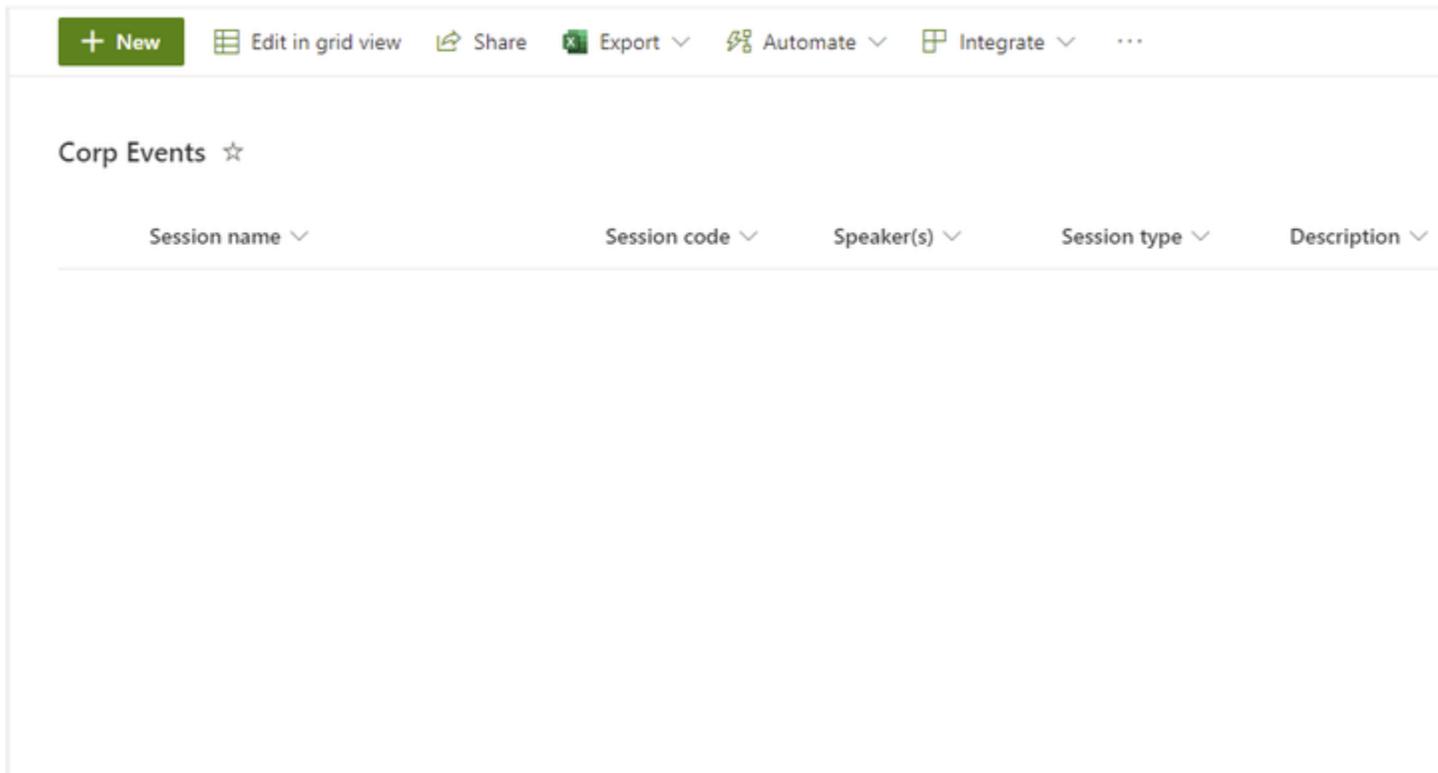
Show in site navigation

< Back

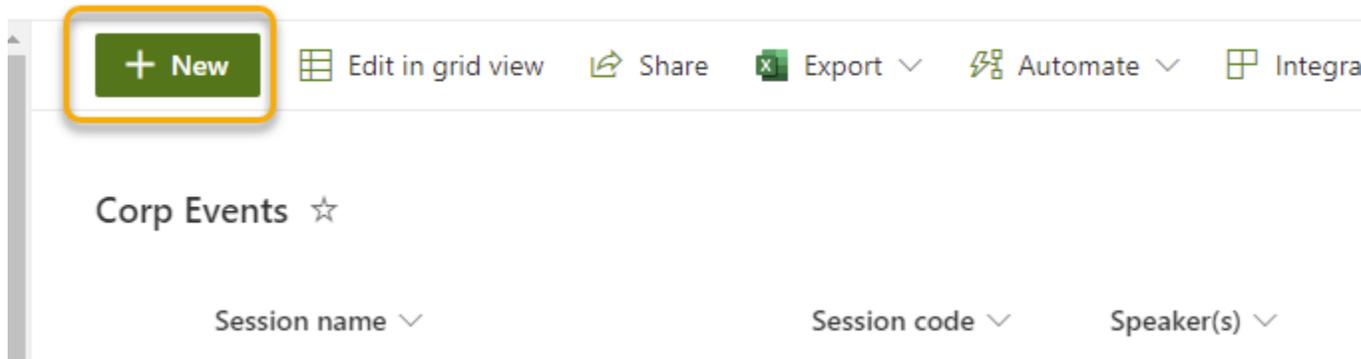
Create Cancel

2. Create an Event entry.
  - A. Click the **Event Itinerary** link within the **Quick Launch** menu. You are now seeing the default view for the list.

le



B. Click the **New** link button in the toolbar.



C. Fill in the form with whatever values you like. You must enter values for the required fields as indicated by the asterisks next to their labels. When you are done click **Save**.

Save X Cancel Copy link

New item

Session name \*

Shareholders Meeting

Session code

Enter value here

Session type

Talk

Describes what kind of a session this is

Description

Prepare for the next year.

Speaker(s)

Enter a name or email address

Start date and time

Enter a date

12:00 AM

- D. Verify that the new entry is in the list.
- E. Feel free to experiment by creating additional events.

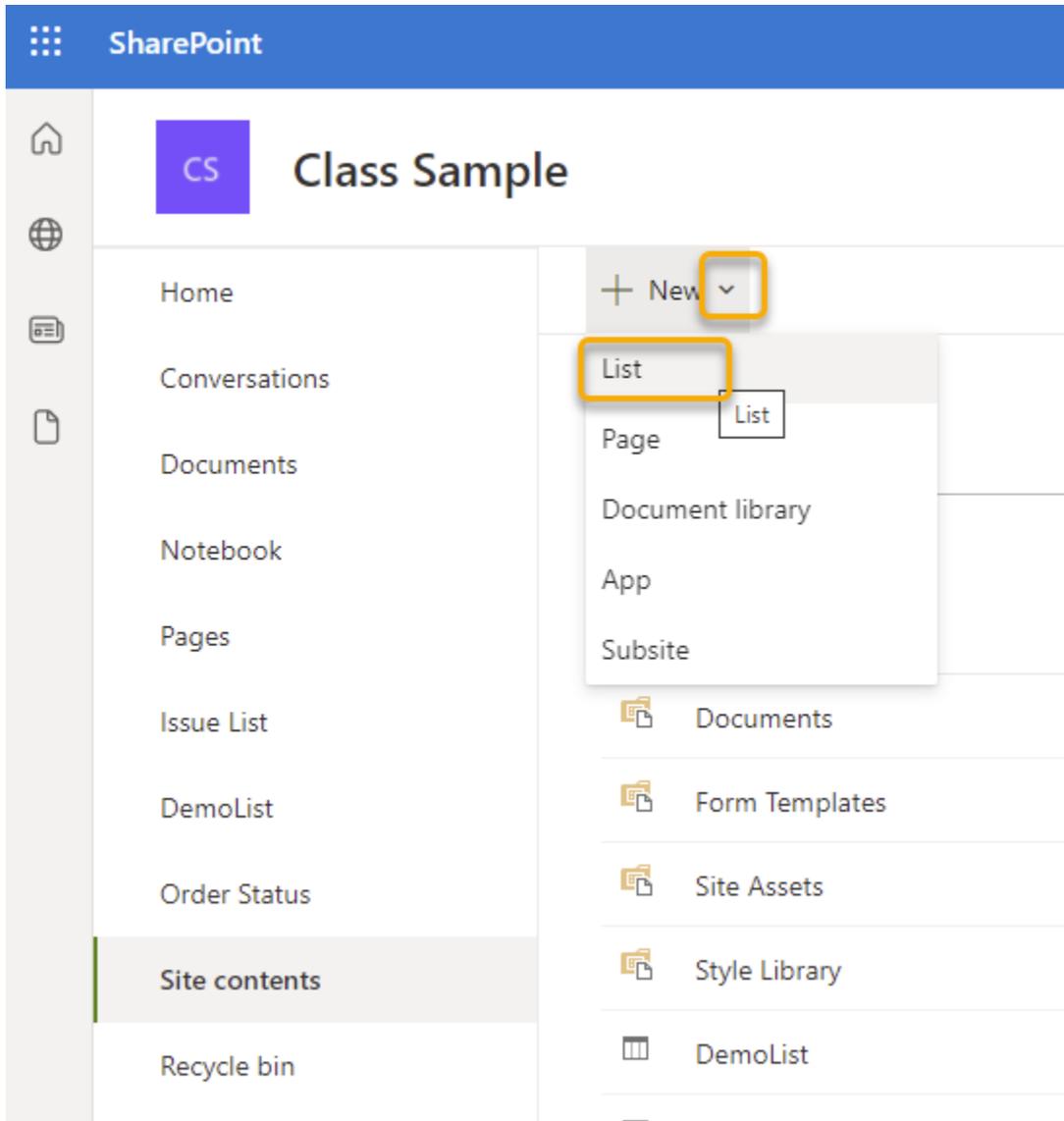
# Exercise 3: Create Custom Lists and Columns

 15 to 25 minutes

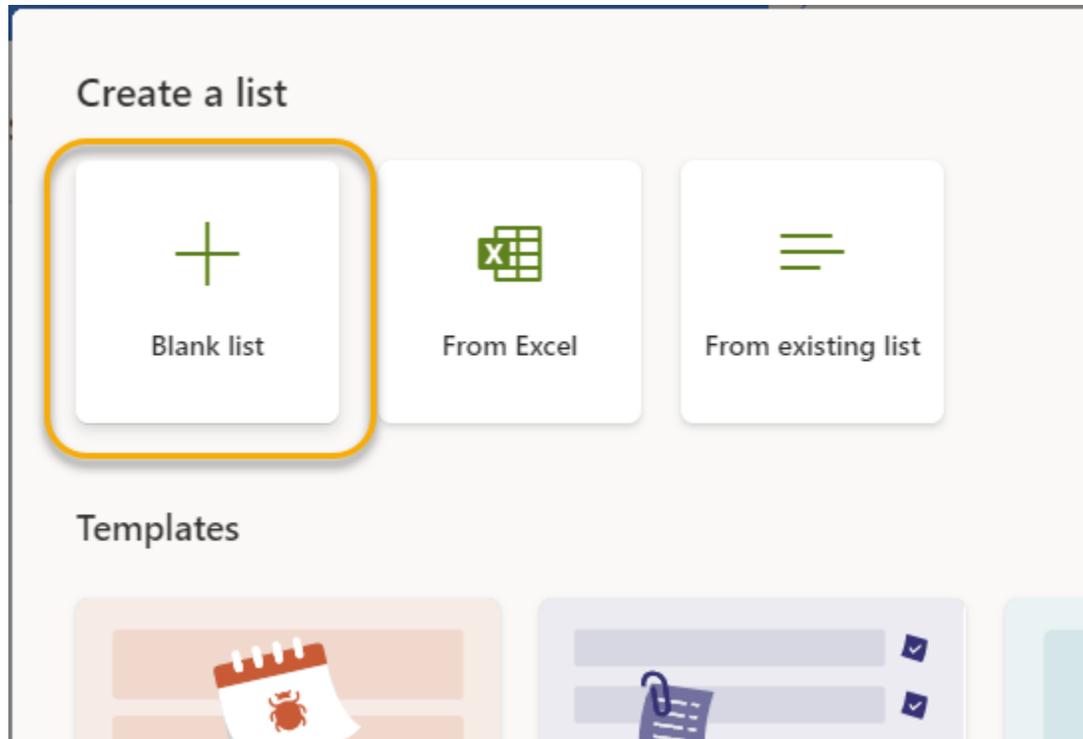
---

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

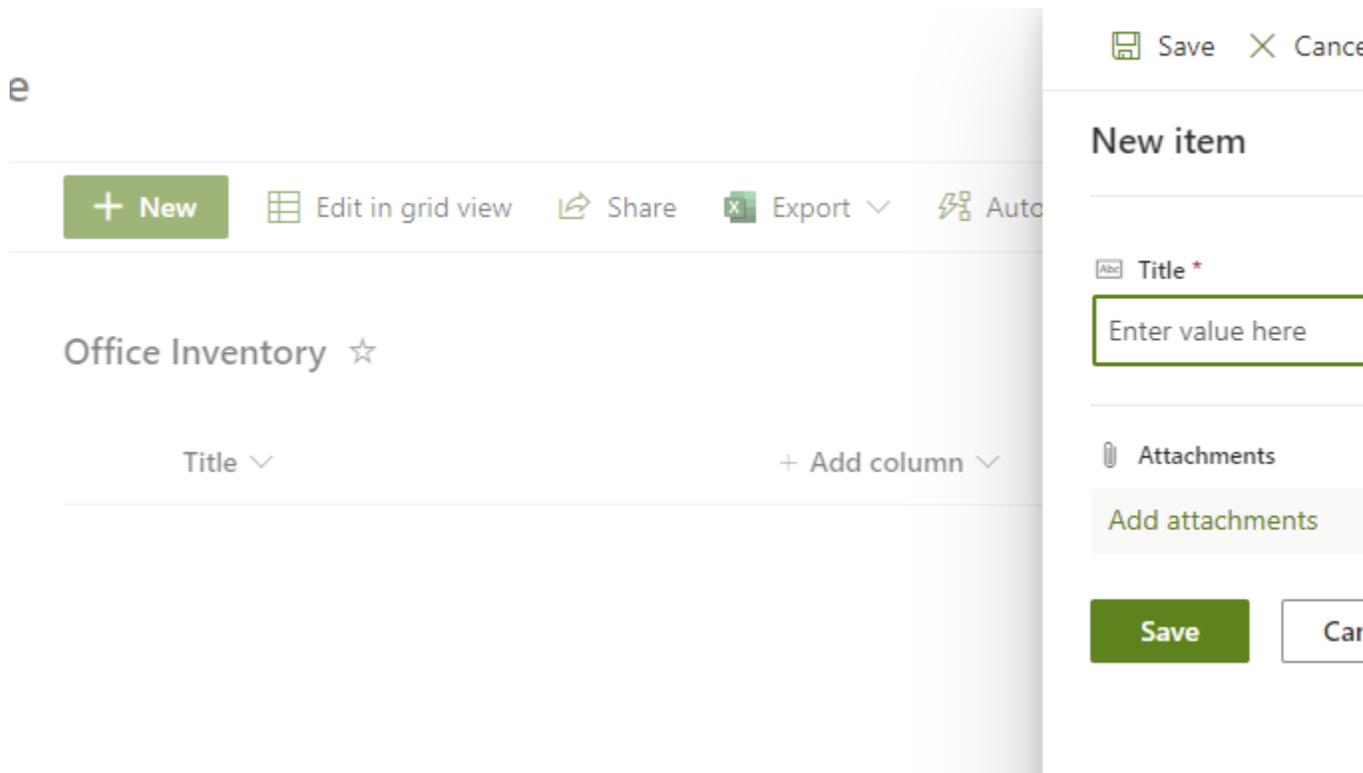
1. Create a new list in your Team Site using the **Blank List** template.
  - A. Click the **Settings** menu and then choose the **Site Contents** menu item. Click **New** and choose **List**.



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



- C. Enter “Office Inventory” in the **Name** field and then click the **Create** button.
2. Add custom columns to the new **Office Inventory** list.
    - A. Click the **Office Inventory** link in the **Site Contents** menu.
    - B. Click the **new** in the 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 Settings** on the **Settings** to open the lists options.
- E. Click the **Create Column** in the Columns category.

## Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type
Title	Single line of text
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group

- [Create column](#)
- Add from existing site columns
- Column ordering
- Indexed columns

F. Enter “Item Description” for the **Column name** field and leave the default **Single line of text** as the data type for the column.



EDIT LINKS

## Settings ▸ Create Column ⓘ

Home

Conversations

Documents

Notebook

Pages

Recent

Issue List

DemoList

Order Status

### Name and Type

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

Column name:

Item Description

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)

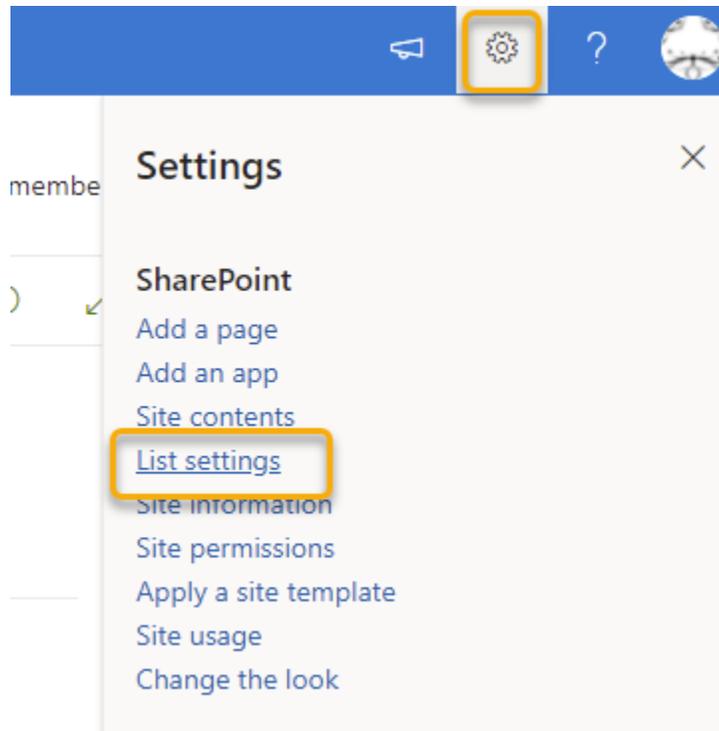
Currency (\$, ¥, €)

Date and Time

Lookup (information already on this site)

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.
3. Rename the existing **Title** column in the **Office Inventory** list to **Item Name**.
- A. Verify that the newly created **Office Inventory** list is selected in your site's **Quick Launch** menu. Select it if it is not.
  - B. Click the **List Settings** on the **Settings** to open the lists options.



- 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 **Columns**.

## Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type
Title	Single line of text
Modified	Date and Time
Created	Date and Time
Item Description	Single line of text
Created By	Person or Group
Modified By	Person or Group

- 
- Create column
  - Add from existing site columns
  - Column ordering
  - Indexed 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".

# Settings ▸ Edit Column ⓘ

## Name and Type

Type a name for this column.

Column name:

Item Name

The type of information in this column is:

Single line of text

## 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

Maximum number of characters:

255

Default value:

Text  Calculated Value

ry

- F. Click the **OK** button to save your changes and return to the list settings page.
- G. Optional: Using your new skills add four more new columns. Use the table to see names and data types. There are also additional column settings to change.

Column Name	Data Type	Additional Column Settings
Item Type	Choice	Choice list will be Furniture, Equipment and Software.
Quantity	Number	Decimal places 2
Item Value	Currency	N/A
Total Value	Calculated	Formula will be =[Quantity]*[Item Value] Data Type Return will be Currency

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

Office Inventory Settings

List Information

**Name:** Office Inventory

**Web Address:** https://webucator.sharepoint.com/...

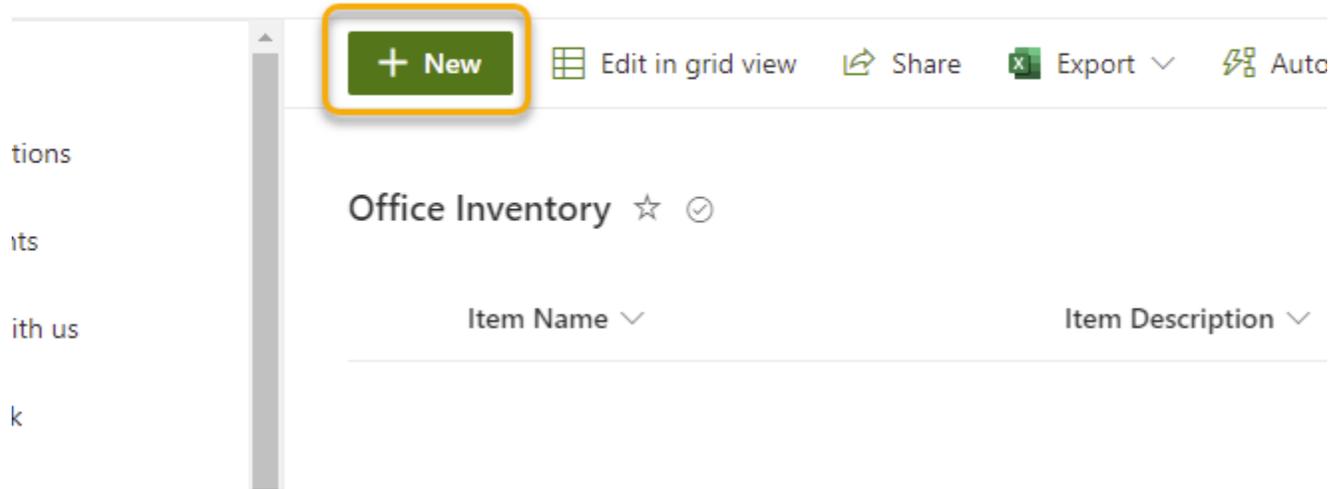
**Description:**

General Settings

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Audience targeting settings
- Rating settings
- Form settings

4. Add some new items to the custom list.
- A. Click the **New** button.

## Class Sample



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

Save Cancel Copy link

### New item

Item Name \*

Desk

Item Description

Front Entry Desk

Item Type

Furniture

Quantity

2

Item Value

356

Attachments

Add attachments

Save Cancel

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

Item Name	Item Description	Item Type	Quantity	Item Value
Desk	Front Entry Desk	Furniture	2	\$356

- D. To add multiple items to the new **Office Inventory** list, you can use the **Edit Grid view** 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 items as well. Click Exit Grid view when you are done entering data.

Item Name	Item Description	Item Type	Quantity	Item Value
Chair	Front Entry Chairs	Furniture	12	125
Laptop	Sales Person Laptops	Equipment	25	750
Desktop Computer	Front Desk Check in	Equipment	1	1250
Office 365	Software License	Software	26	95

- E. Compare your list to the following image:

The screenshot shows the SharePoint interface for the 'Office Inventory' list. At the top, there is a navigation bar with buttons for '+ New', 'Exit grid view' (highlighted with an orange box), 'Undo', 'Share', 'Export', and 'Automate'. Below the navigation bar, the list title 'Office Inventory' is displayed with a star and a refresh icon. The list is shown in a grid view with columns: Item Name, Item Description, Item Type, Quantity, and Item Value. The first item, 'Desk', is highlighted with a green box. Below the list, there is a '+ Add new item' button.

Item Name	Item Description	Item Type	Quantity	Item Value
Desk	Front Entry Desk	Furniture	2.00	
Chair	Front Entry Chairs	Furniture	12.00	
Laptop	Sales Person Laptops	Equipment	25.00	
Desk Top Computer	Front Desk Check in	Equipment	1.00	
Office 365	Software License	Software	26.00	

+ Add new item

It should look the same or similar depending on whether you used your own items or not. Note the **Item Value** column is formatted as currency for you based on the data type you chose for that column. Also note that Total Value was not something

you manually typed it, you entered the Quantity and the Item value and SharePoint did the math!

## Conclusion

In this lesson, you have learned:

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

# LESSON 4

## Library Basics

---

### Topics Covered

- New libraries using library templates.
- Working with the different libraries in a default Team Site.
- Adding columns to a library.
- Checking out documents for editing.
- Deleting and restoring documents from document libraries.
- Viewing versioning on a library.
- Reverting a library document to 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 an 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.



## 4.1. 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.



## 4.2. Creating Libraries

### ❖ 4.2.1. 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 **Site Contents** menu item. Click **New** and choose **Document Library**.



## Class Sample

The screenshot shows a SharePoint navigation pane on the left with the following items: Home, Conversations, Documents, Notebook, Pages, Issue List, DemoList, Order Status, Corp Events, Office Inventory, and Site contents (highlighted). On the right, the '+ New' dropdown menu is open, showing options: List, Page, Document library (highlighted), App, and Subsite. A tooltip for 'Document library' is also visible. Below the dropdown, a list of site components is shown with icons and names: Documents, Form Templates, Site Assets, Style Library, Corp Events, DemoList, and Issue List.

- B. In the form type “MyDocs” in the **Name** field. Make sure the check mark is active for Show in site navigation. Click the **Create** button to complete the process.

rk

Create document library

Name \*

MyDocs

Description

Show in site navigation

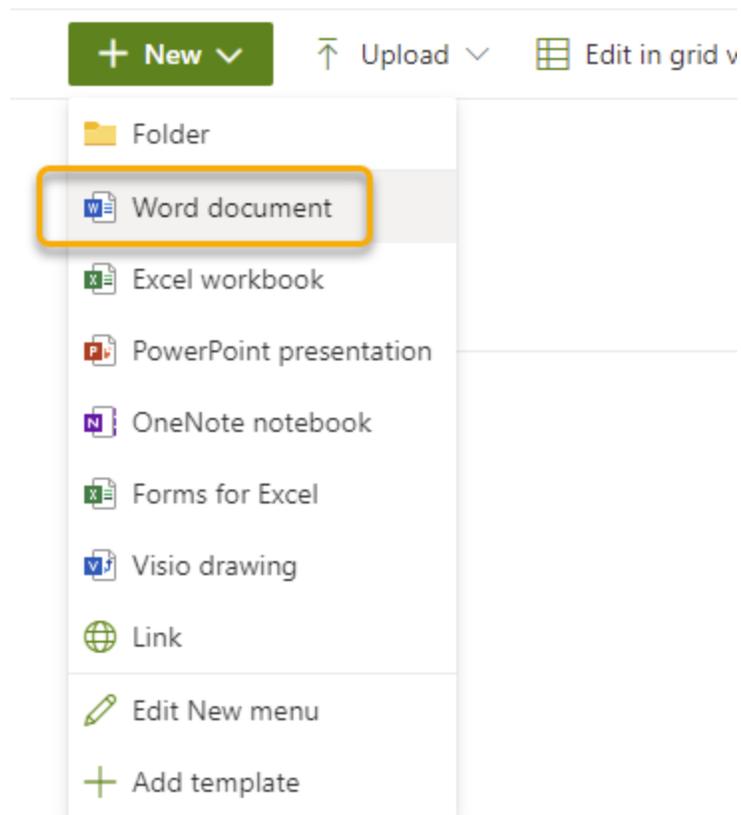
Create Cancel

### 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.

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

- A. Click the **Library Settings** on the **Settings** to open the lists options. NOTE: If you use a different template or Classic layout you may need to click the Library tab, Library settings.
  - B. Click **Create Column**.
  - C. 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**.
  - D. Leave the rest of the column options at their default settings and click the **OK** button to complete creating the new library column.
3. Click the **New** button and choose **Word document**.



4. A new file will open in Word Online. Type the following text in the new blank Microsoft Word document: “This document is for a demonstration on SharePoint document libraries.”
5. The file will be saved automatically.

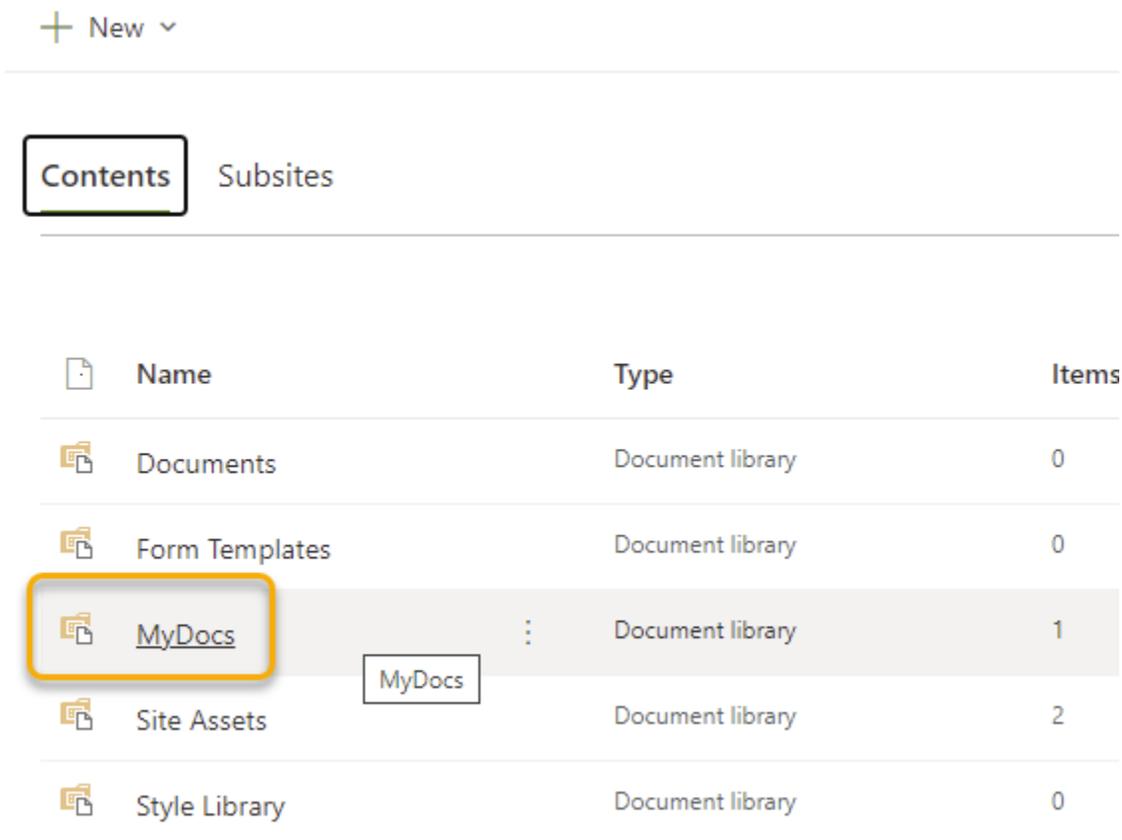


## 4.3. Managing Documents and Versioning

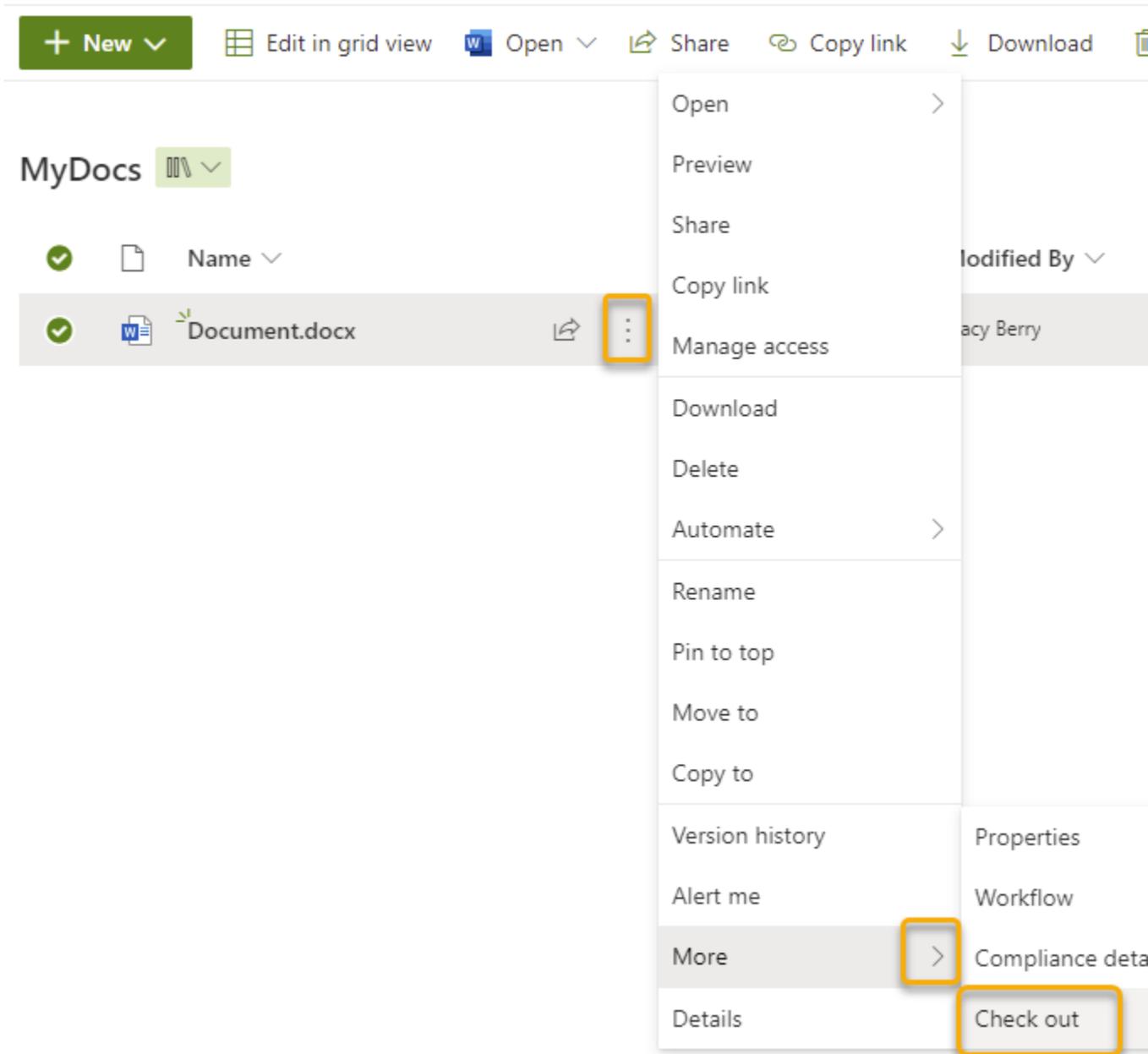
### ❖ 4.3.1. Checking Out Documents

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.

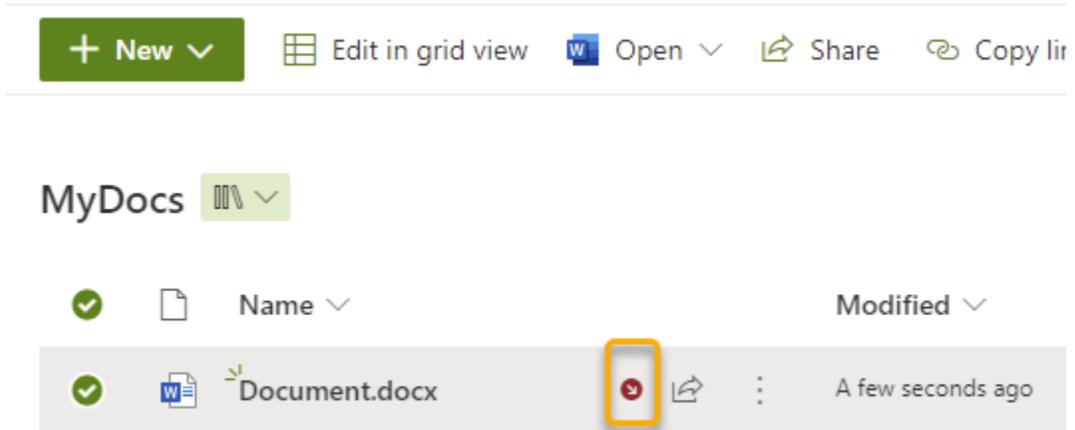
1. **Check Out** a document from the **My Docs** library.
  - A. Click the **My Docs** link in the **Site Contents** menu.



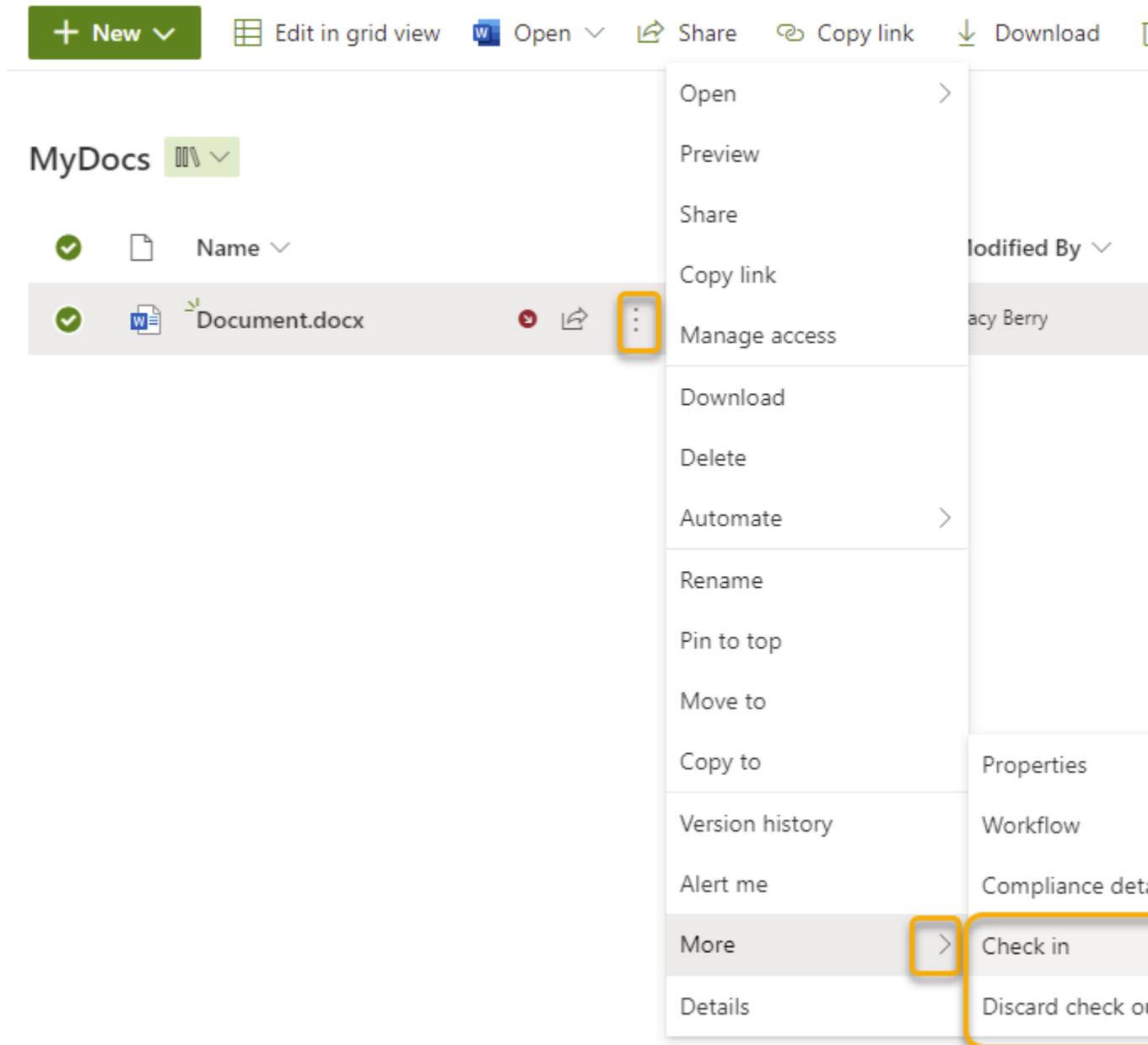
- B. Click the ellipsis button next to the title of the item and then click **More > Check Out**. NOTE: This may be under a category named Advanced instead of More if your settings are different than this sample.



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



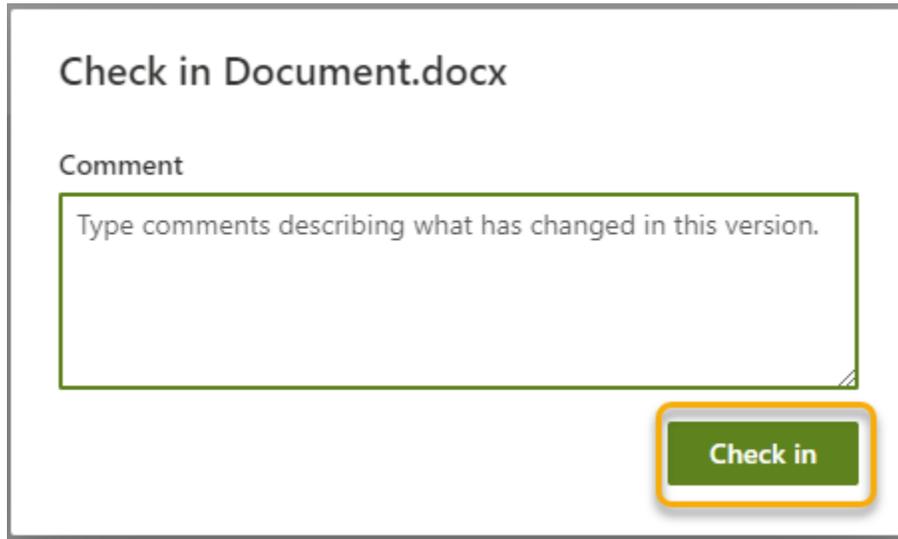
2. Check the file back in to **My Docs** library.
  - A. Repeat the previous steps to open the item menu for the document that is currently checked out.
  - B. Note that the item menu is slightly different. Instead of the menu option **Check Out**, you have two new options **Check In** and **Discard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



### Discard Check Out

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

- C. Click the **Check In** option from the item menu.
- D. In the **Check In** dialog form, click the **OK** button to complete the check in.



Check in Document.docx

Comment

Type comments describing what has changed in this version.

Check in

### ❖ 4.3.2. 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** menu.

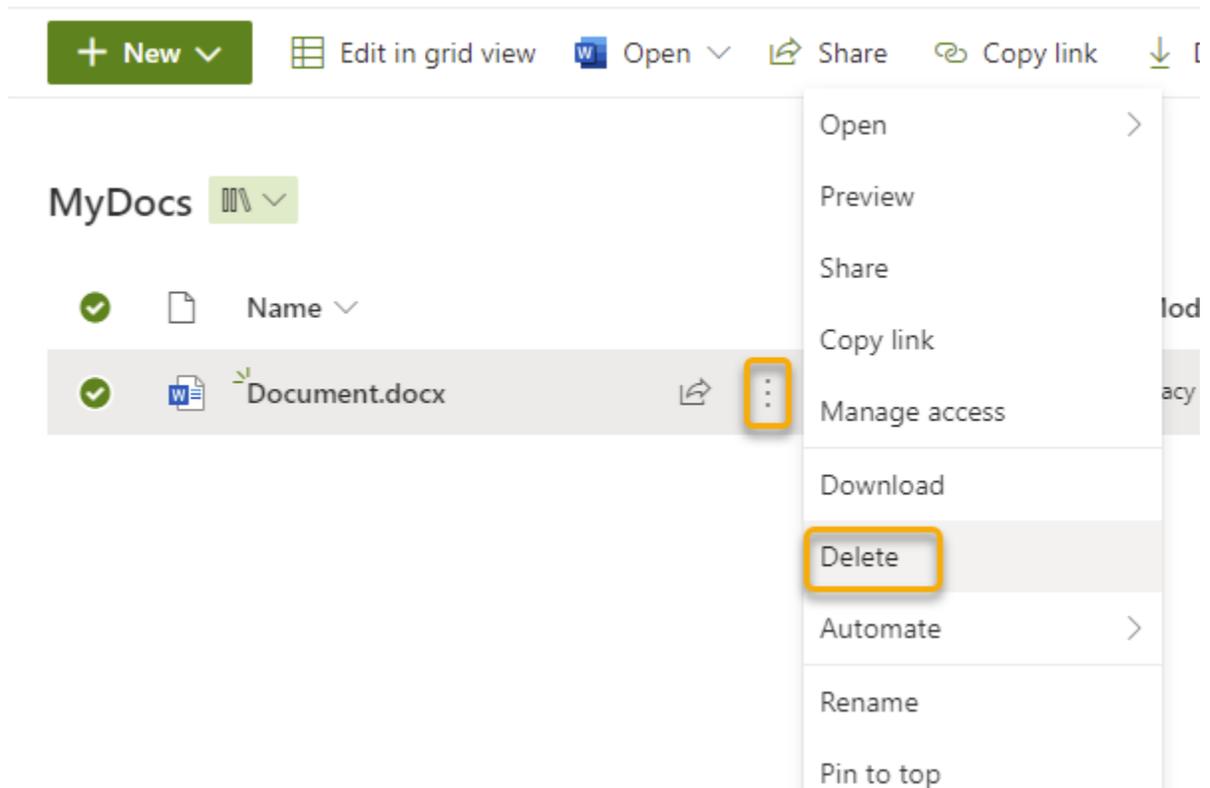
+ New ▾

Contents

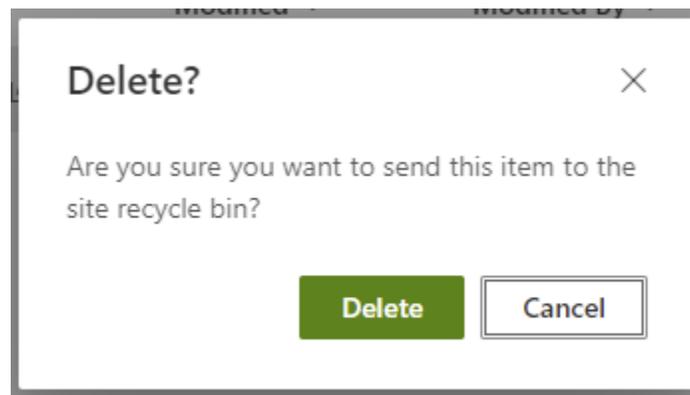
Subsites

	Name	Type	Items
	Documents	Document library	0
	Form Templates	Document library	0
	<u>MyDocs</u> 	Document library	1
	Site Assets	Document library	2
	Style Library	Document library	0

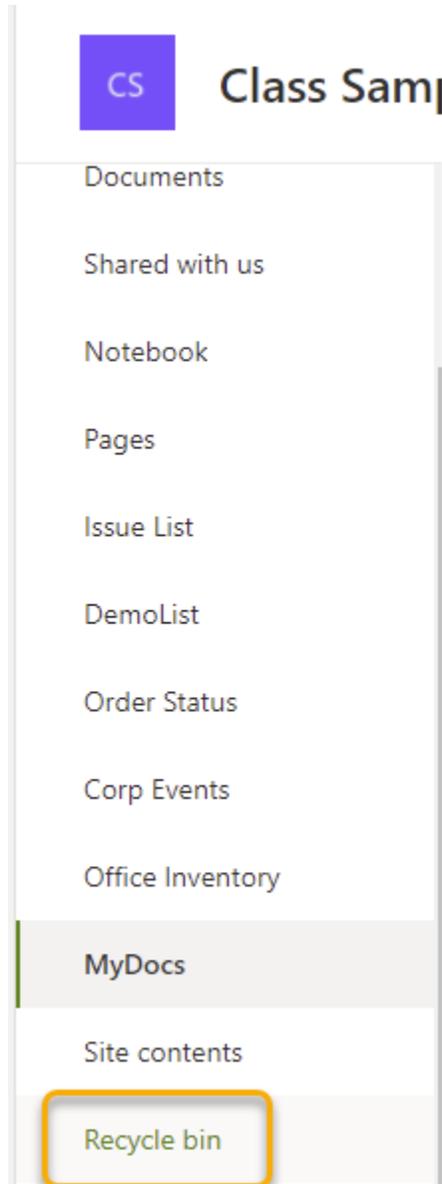
- B. Click the ellipsis button next to the title of the item and then click **Delete**.



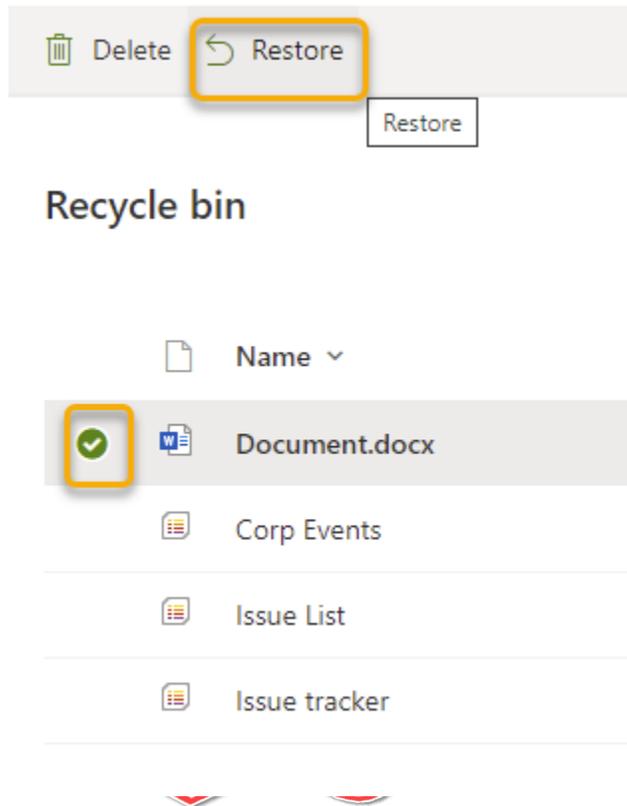
- C. Click the **OK** button on the **Message from web page** dialog window asking you to verify sending the item to the recycle bin.



- D. Verify that the **Document** has been removed from the **My Docs** library.
2. Recover the deleted **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 **Document** item to select it and click the **Restore** at the top of the list to restore the document. NOTE: If you use a different template you may see a different Restore icon.



- C. Verify that **Document.docx** is back in the library.

### ❖ 4.3.3. 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 view versioning settings and require documents to be checked out in the **My Docs** document library and test the results.

1. Enable versioning in the **Sample Site My Docs** document library.
  - A. Click the **My Docs** link in the **Site Contents** menu.

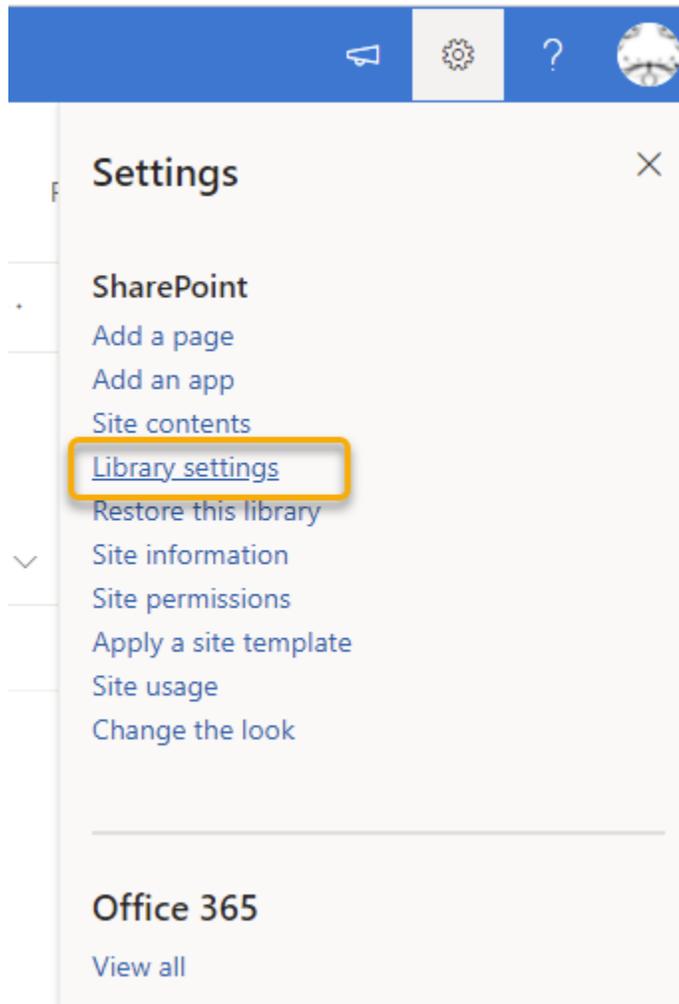
+ New ▾

Contents

Subsites

 Name	Type	Items
 Documents	Document library	0
 Form Templates	Document library	0
 <u>MyDocs</u> 	Document library	1
 Site Assets	Document library	2
 Style Library	Document library	0

- B. Click the **Library Settings** on the **Settings** to open the lists options. NOTE: If you use a different template you may need to click the Library tab, Library settings.



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

 EDIT LINKS

# MyDocs ▸ Settings

ns

List Information

**Name:** MyDocs

**Web Address:** https://\

**Description:**

General Settings

- List name, description and navigation
- **Versioning settings**
- Advanced settings
- Validation settings
- Column default value settings
- Audience targeting settings
- Rating settings
- Form settings

;

tory

s

- D. In the **Version Settings** page, click the **Create major and minor (draft) versions** option. Click the **Yes** option for the **Require documents to be checked out before they can be edited** setting. Click the **OK** button to save the changes.

## Settings ▸ Versioning Settings

### Content Approval

Specify whether new items or changes to existing items should remain in a draft state until they have been approved. [Learn about requiring approval.](#)

### Document Version History

Specify whether a version is created each time you edit a file in this document library. [Learn about versions.](#)

y

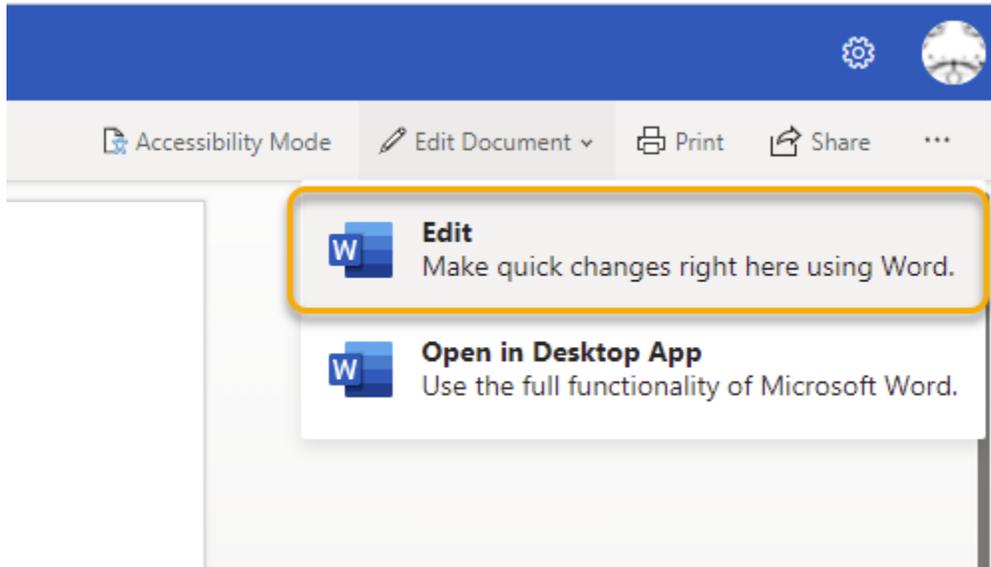
### Draft Item Security

Drafts are minor versions or items which have not been approved. Specify which users should be able to view drafts in this document library. [Learn about specifying who can view and edit drafts.](#)

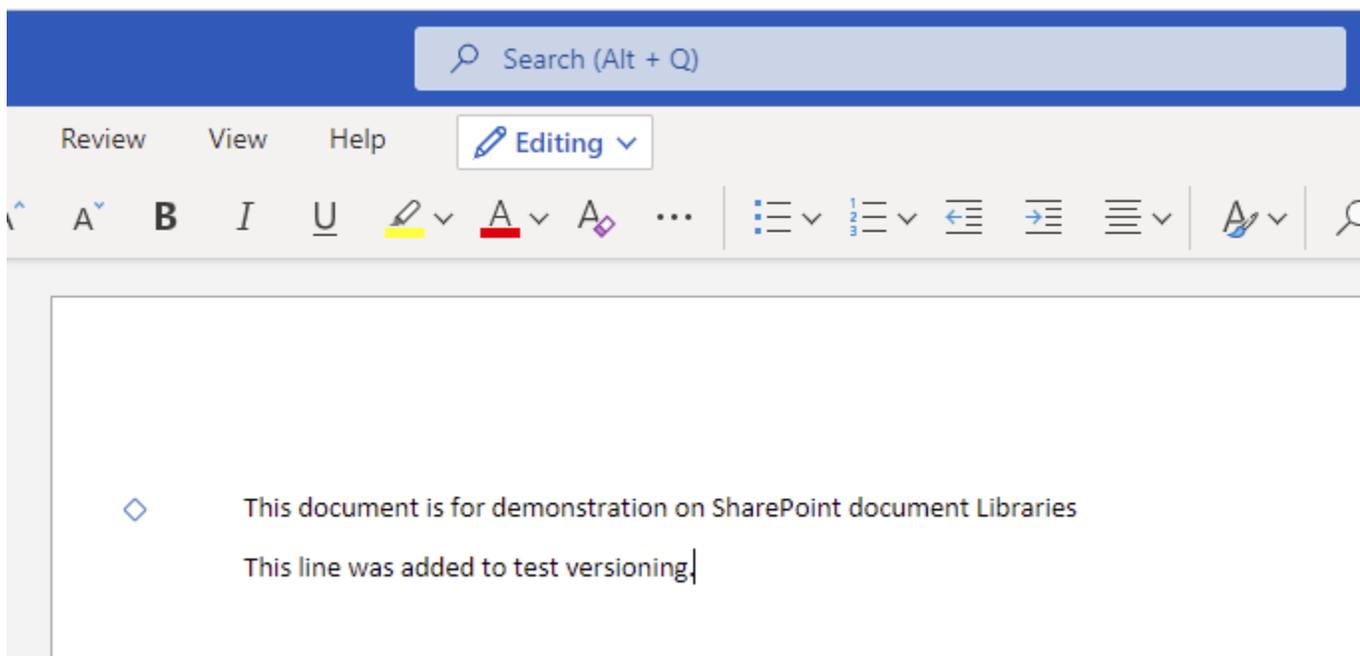
### Require Check Out

Specify whether users must check out documents before making changes in this document library. [Learn about requiring check out.](#)

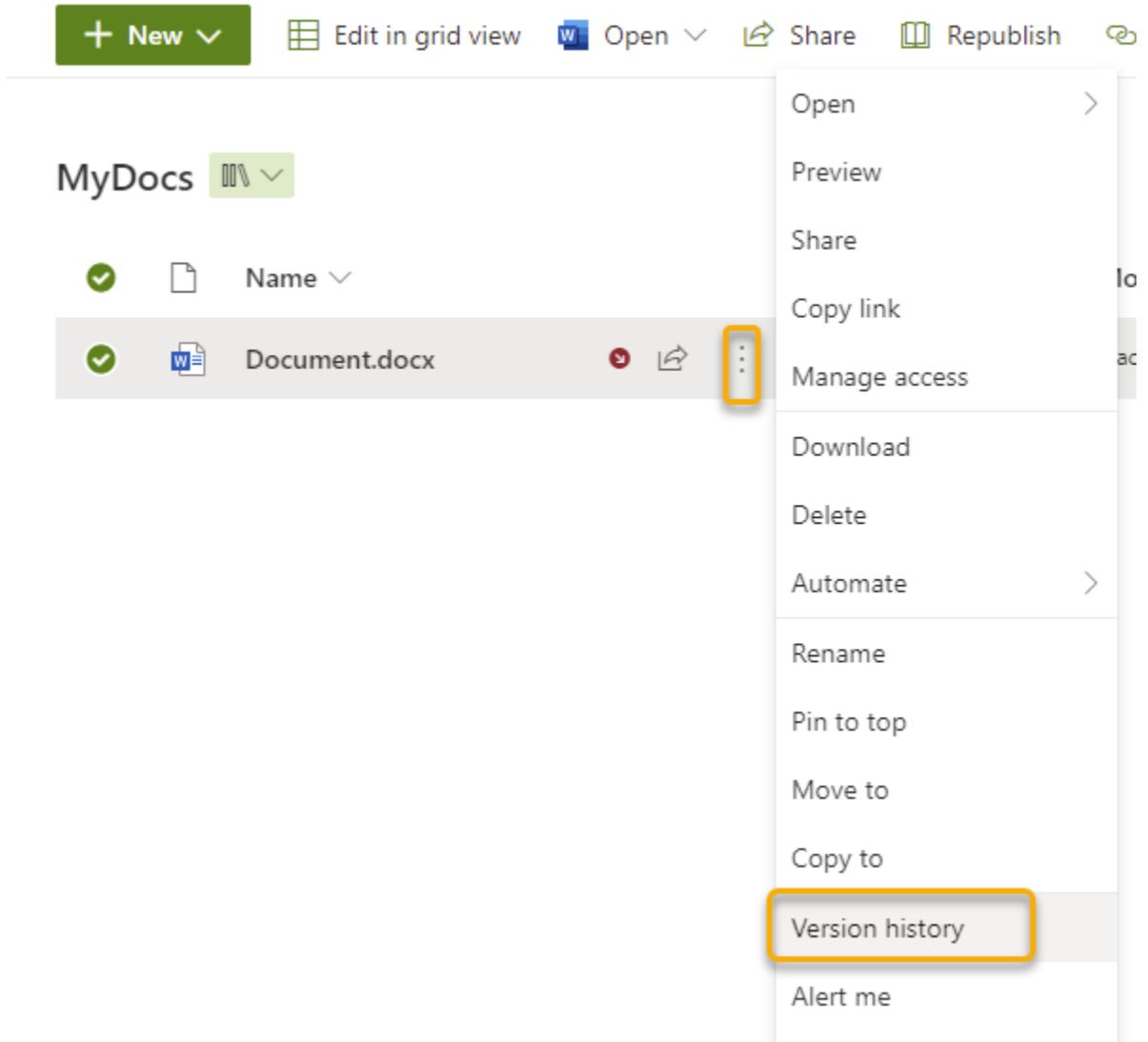
- 
- E. Click the **My Docs** link in the breadcrumbs to navigate back to the **browse** view of the library.
2. Edit the **Document** to test versioning settings.
    - A. Click the **Document** link in the **My Docs** library to open the file in Microsoft Word Online for editing. Note you may have to check out the file first. Click the file to open document for editing.



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



- C. The file **Saved** automatically.
  - D. Click the close icon of the Word window.
3. Restore a previous version of **Document** in the **My Docs** library.
    - A. Click the menu option **Version History**.



- B. Since both major and minor version was enabled, you see both draft and major versions. Users with **Visitor** permissions would only be able to see published major versions.

+ New ▾ Edit in grid view Open ▾

## Version history

Delete All Versions | Delete Minor Versions

No. ↓ Modified

4.1	3/28/2022 10:37 AM
This is the current published major version	
4.0	3/28/2022 9:26 AM
3.0	3/28/2022 9:21 AM
2.0	3/28/2022 9:15 AM
1.0	3/28/2022 9:14 AM

C. Select **Restore** from a previous version menu.

## Version history

Delete All Versions | Delete Minor Versions

No. ↓ Modified

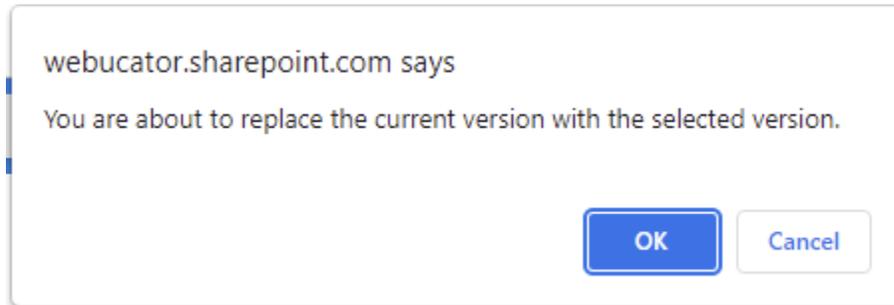
4.1	3/28/2022 10:37 AM
This is the current published major version	
4.0	3/28/2022 9:26 AM
3.0	3/28/2022 9:21 AM
2.0	3/28/2022 9:15 AM
1.0	3/28/2022 9:14 AM

View

Restore

Restore

- 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.

**Version history**

[Delete All Versions](#) | [Delete Minor Versions](#)

No. ↓	Modified	Modified By	Size
4.1	3/28/2022 10:57 AM	<input type="checkbox"/> Tracy Berry	18.8 KB
This is the current published major version			
4.0	3/28/2022 9:26 AM	<input type="checkbox"/> Tracy Berry	18.8 KB
3.0	3/28/2022 9:21 AM	<input type="checkbox"/> Tracy Berry	18.8 KB
2.0	3/28/2022 9:15 AM	<input type="checkbox"/> Tracy Berry	16.9 KB
1.0	3/28/2022 9:14 AM	<input type="checkbox"/> Tracy Berry	16.9 KB

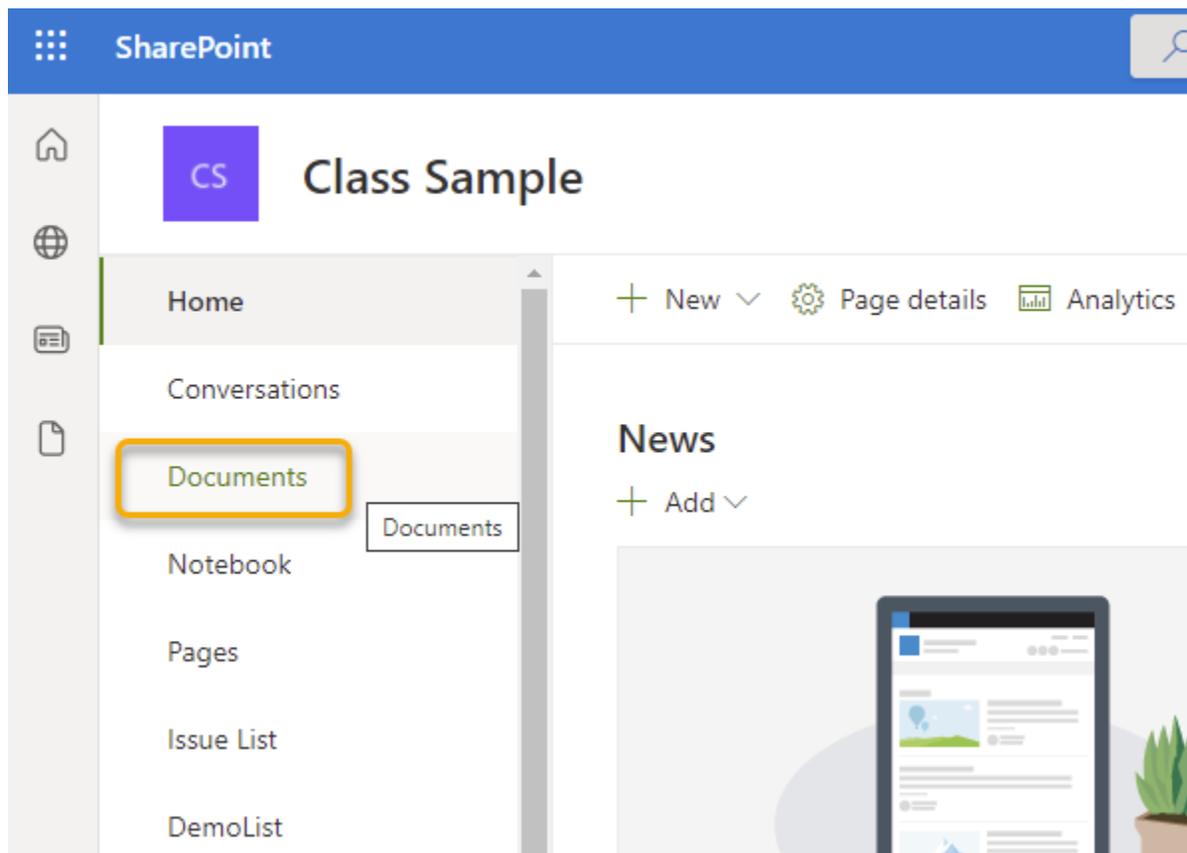
- F. Click the **Document** link in the **My Docs** library to open the file in Microsoft Word Online.
- G. Verify that the changes made earlier are not in this version of the document.

# 📄 Exercise 4: Working with Team Site Libraries

🕒 5 to 10 minutes

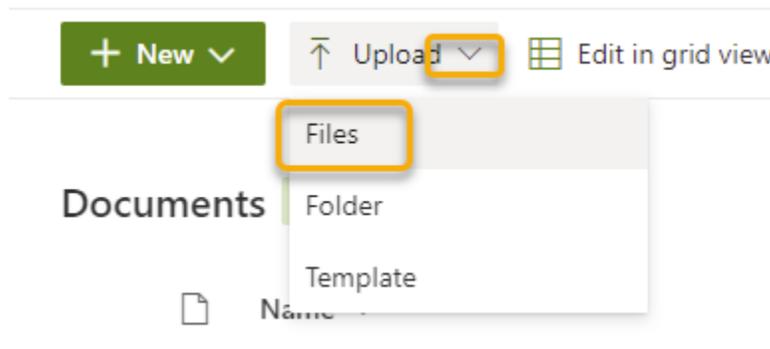
In this exercise, you will work with the default Team Site libraries.

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

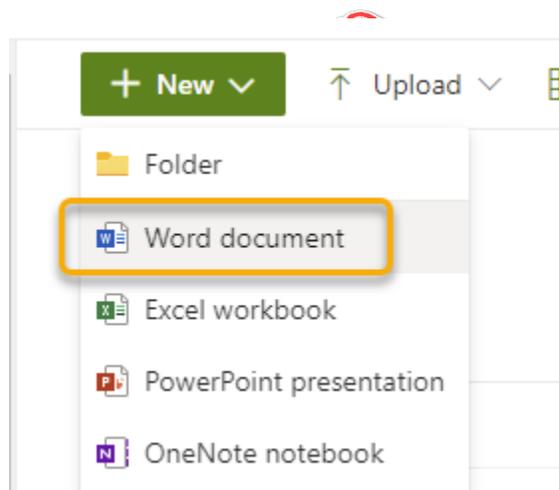


This should take you to the default view of the library.

- B. Click **Upload > Files** to add an existing file.



- C. Choose the file and click the **Open...** button to upload the file.
2. Create a new document directly into **Documents** library.
    - A. Click the **New** button and choose the type of file.



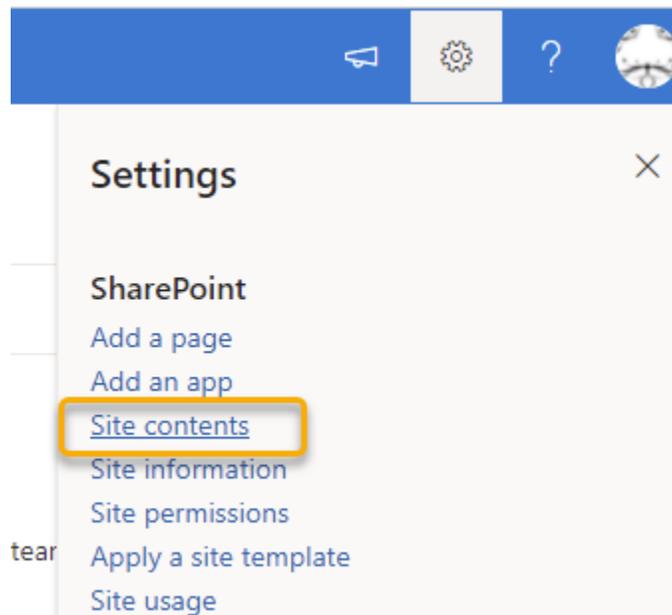
- B. Microsoft Word Online should open to a blank page. Enter the following text into the document: "SharePoint 365 is a great collaboration product." The page will save automatically.
- C. Close Microsoft Word Online and note the new document in the library. You may need to refresh the page if you don't see it in the list of documents.

# Exercise 5: Creating Libraries

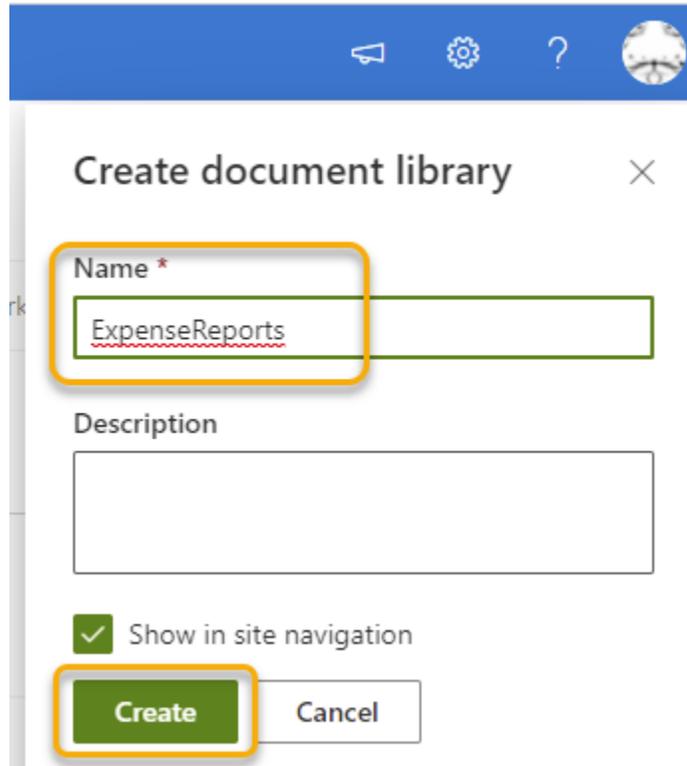
 5 to 10 minutes

In this exercise, you will create a new library using the Document Library template.

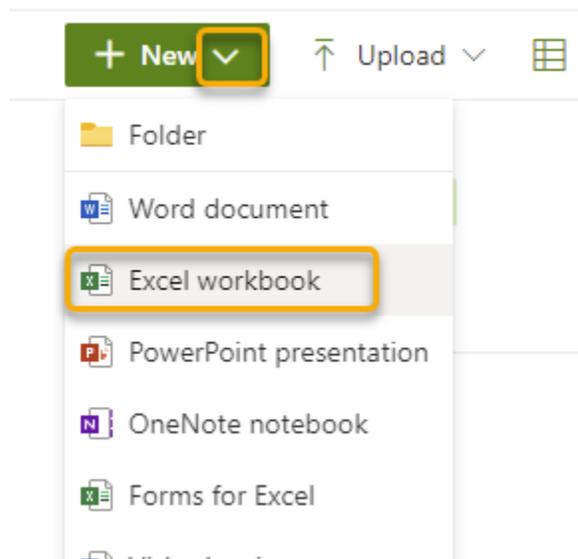
1. Create a new library using the Document Library template.
  - A. Click the **Settings** menu and then choose the **Site Contents** menu item. Click **New** and choose **Document Library**.



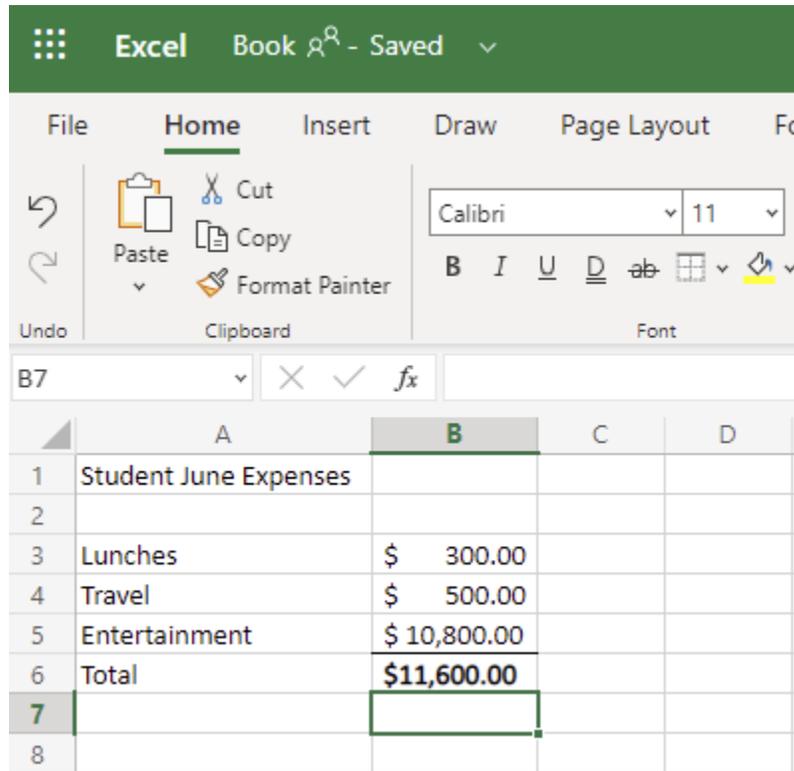
- B. In the **New** form that opens enter “Expense Report” in the **Name** field and click **Create**.



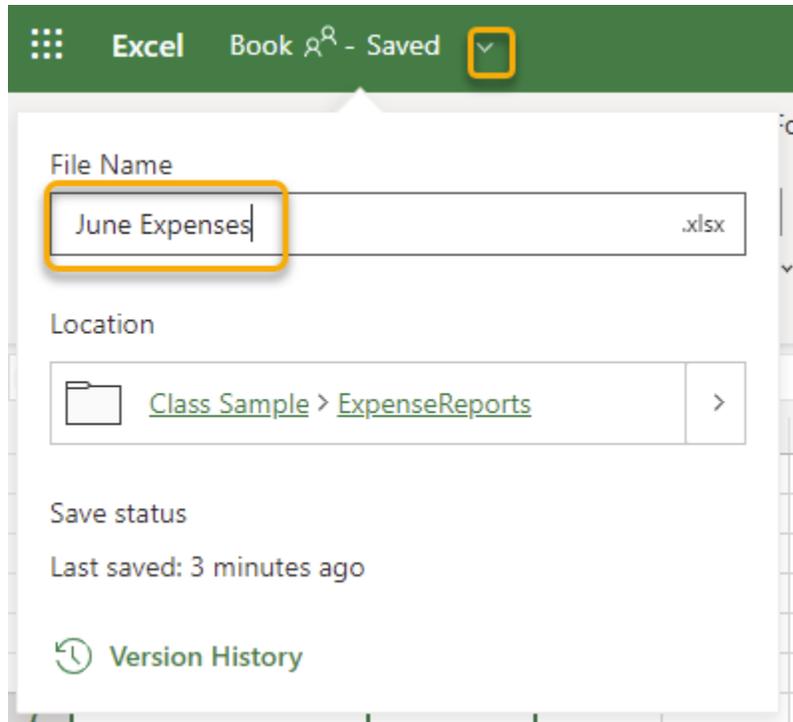
2. Create a new item in the new **Expense Reports** document library.
  - A. Make sure **Expense Reports** is selected in the **Site Contents** menu. Click the **New** button and choose **Excel workbook**.



- B. Microsoft Excel should open to a blank spreadsheet based on the **Microsoft Excel spreadsheet** template you chose when creating the **Expense Reports** library.
- C. Enter data into the spreadsheet. You can use the following image as an example:



- D. The file will save automatically.
- E. Enter "June Expenses" for the file name.



- F. 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** menu to refresh the page.

## Conclusion

In this lesson, you have learned:

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

# LESSON 5

## Working with Lists and Library Views

---

### Topics Covered

- Default views built into lists and libraries.
- Personal views.
- Shared views.
- Configuring views.
- Setting the default view for a list or library.

### Introduction

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



## 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 **Corp Events** list in order to have something to display in the views.
  - A. Click the **Corp Events** link on the **Site Contents**.
  - B. Click the **new item** link in the list to open the **New Item** form and use the following table for information to fill in the form:

**Item 1**

<b>Field</b>	<b>Data</b>
Session Name:	Client Review
Session Type:	Panel
Description:	Rank and process requests

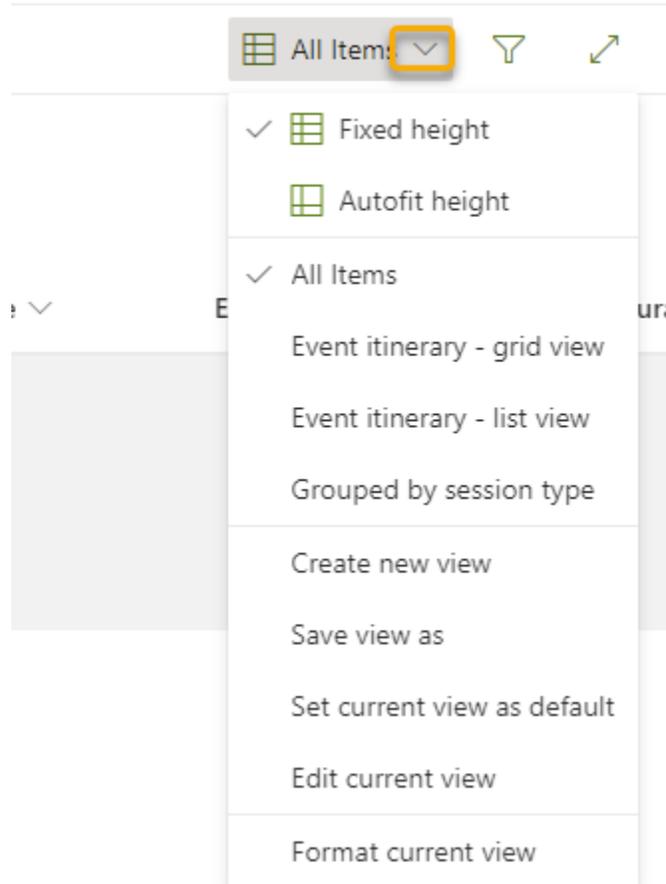
- C. Click the **Save** button on the **New Item** dialog to save the task to the **Corp Events** list.
- D. Repeat the previous two steps with the following information to create a second item:

**Item 2**

<b>Field</b>	<b>Data</b>
Session Name:	New Hire Onboarding
Session Type:	Talk
Description:	Welcome the new hires!

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.

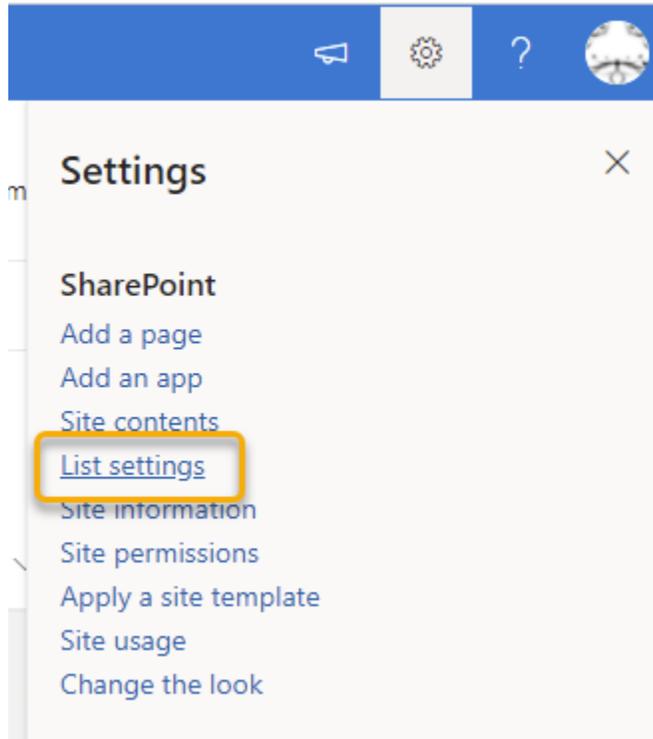
Private group ★ Following 👤 1 member



### Security-Trimmed Views

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.

3. Manage the views for the **Tasks** list.
  - A. Click the **List Settings** button from settings.



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

#### Views

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

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

▫ [Create view](#)

- C. Click the **Event Itinerary - grid view** link from within the **Views** region to open the **Edit View** page for the view.
- D. Note the options.

# Settings ▸ Edit View ⓘ

s

## Name

Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

View Name:

Event itinerary - grid view

Web address of this view:

https://webucator.sharepoint.com/sites/ClassSample/Lists/Corp E

This view appears by default when visitors follow a link to this list. If default.

## Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the **Position from left** box.

### Display



Session name (linked to item with edit menu)



Session code



Speaker(s)

### Column Name

ory

irts

## View Settings

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.

- E. 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.

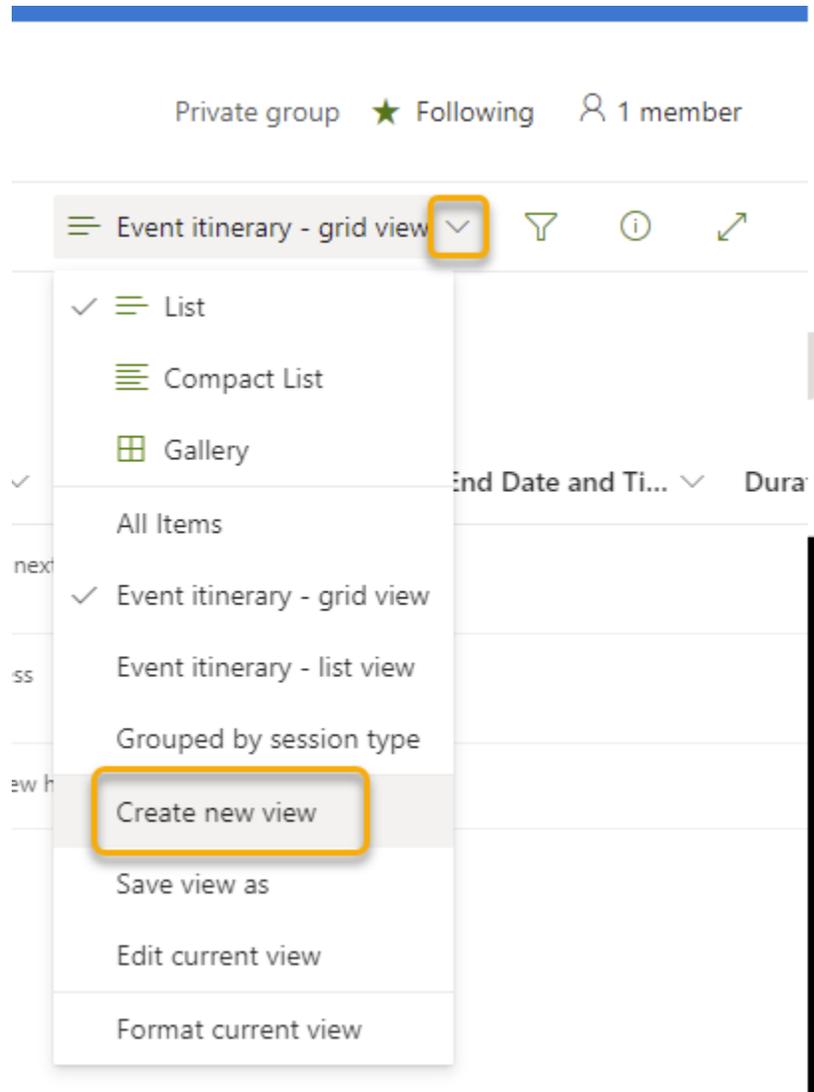


## 5.2. Custom Views

### ❖ 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 **Corp Events** list.

1. Create a custom view of **Corp Events** using the **Standard View** format.
  - A. Navigate to the **Corp Events** list of the site by clicking the **Corp Events** link in the **Quick Launch** menu.
  - B. Click the **View List** and choose **Create new view**.



- C. Click **List** from the show as region. Name the view "Class Test" and click **Create**.

The screenshot shows a 'Create view' dialog box with the following elements:

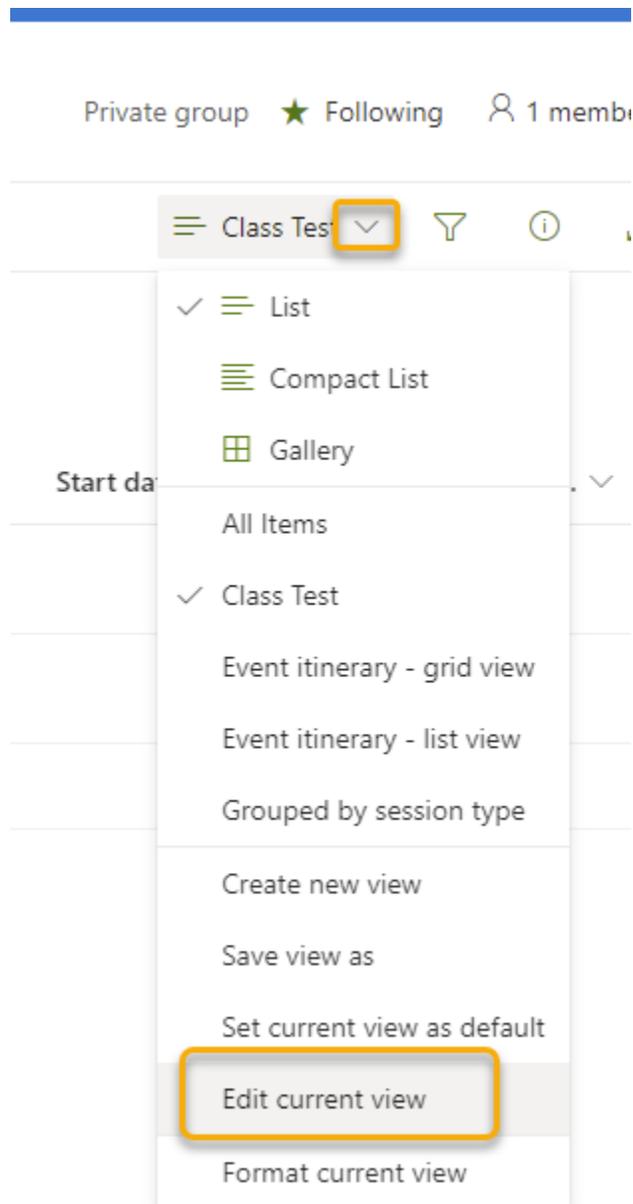
- View name:** A text input field containing 'Class Test'.
- Show as:** A group of four buttons: 'List' (selected), 'Calendar', 'Gallery', and 'Board'.
- Visibility:** A section with an information icon and a checked checkbox labeled 'Make this a public view'.
- Buttons:** 'Create' and 'Cancel' buttons at the bottom right.

- D. Type “In Progress” in the **View Name** field and click **Create**.

#### Public Views and 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.

- E. Select **Edit current view** from the view list.



- F. Select the following from the **Columns** region; everything else should be deselected.
- Session Name (linked to item with edit menu)
  - Session Type
  - Description

### Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the **Position from left** box.

#### Display



Session name (linked to item with edit menu)



Session code



Speaker(s)



Session type



Description



Start date and time



End Date and Time



Duration

#### Column Name

- G. Select **Session Name** for the **First sort by the column** selection under the **Sort** region.

### Sort

Select up to two columns to determine the order in which the items in the view are displayed. [Learn about sorting items.](#)

First sort by the column

None



End Date and

Folder Child C

ID



Item Child Cou

Item is a Recor

Label applied b

Label setting

Then s

Location

Modified

Modified By



Retention labe

Retention labe

Session code



Session name

Session type

Sc

Start date and

Title

Title (linked to

- H. Select **Sessoin Type** for the **Show the items when column** selection under the **Filter** region. Leave the **operator** drop-down set to **is equal to** and type **Talk** in the **value** field text box.

## Filter

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)

○ Show all

Show items

Show the

Session

is equal

Talk

And

When co

None

is equal

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

- ⊕ Tabular View
- ⊕ Group By
- ⊕ Totals
- ⊕ Style
- ⊕ Folders
- ⊕ Item Limit
- ⊕ Mobile

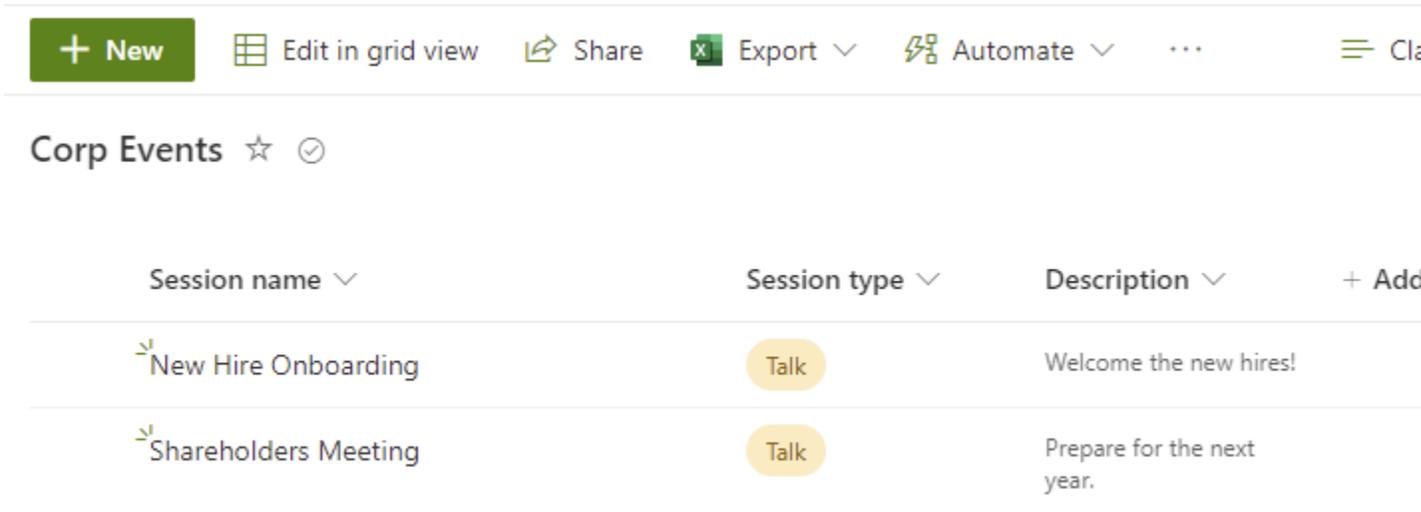
Show More Colu

Delete

OK

- J. 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 **Class Test** selected. The items listed should only include events that have their Session Type field set to Talk.



The screenshot shows a SharePoint list view for 'Corp Events'. At the top, there is a navigation bar with buttons for '+ New', 'Edit in grid view', 'Share', 'Export', 'Automate', and a menu icon. Below the navigation bar, the list title 'Corp Events' is displayed with a star and a refresh icon. The list itself has a table structure with columns for 'Session name', 'Session type', and 'Description'. Two items are listed: 'New Hire Onboarding' and 'Shareholders Meeting', both with a 'Talk' session type.

Session name	Session type	Description	+ Add
New Hire Onboarding	Talk	Welcome the new hires!	
Shareholders Meeting	Talk	Prepare for the next year.	

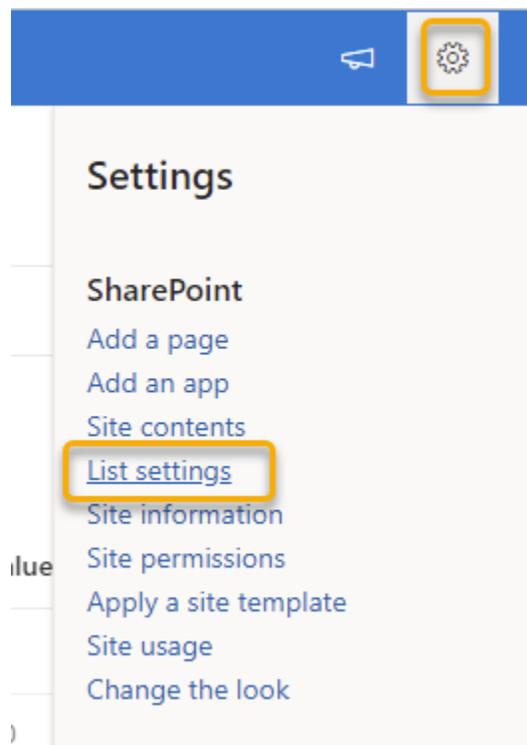
3. Click the **Corp Events** link in the **Quick Launch** and note how the view is reset back to the default **Event itinerary**. You could optionally set the custom view **Class Test** as the default view for the list.

# 📄 Exercise 6: Creating Public and Personal Views

🕒 15 to 25 minutes

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

1. Create a new public view for the **Office Inventory**.
  - A. Click the **Office Inventory** link on the **Site Contents**.
  - B. Click the **Settings** menu and then choose the **List Settings** menu item.



- C. Click the **Create view** link.

## Views

A view of a list allows you to see a particular select

View (click to edit)

All Items

▫ [Create view](#)

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

## Settings ▸ View Type ⓘ

Choose a view type



### Standard View

View data on a Web page. You can choose from a list of display styles.



### Datasheet View

View data in an editable spreadsheet format, convenient for bulk editing.



### Calendar View

View data as a daily, weekly, or monthly calendar.



### Gantt View

View list items in a Gantt chart representation of how a task is scheduled over time.

Start from an existing view

▫ All Items

- E. Enter “Company Furniture” in the **View Name** field and leave the **View Audience** field set to **Create a Public View**.

# Settings ▸ Create View ⓘ

**Name**

Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

**Audience**

Select the option that represents the intended audience for this view.

**View Name:**  
Company Furniture

Make this the default view  
(Applies to public views only)

**View Audience:**

Create a Personal View  
Personal views are intended for your use only

Create a Public View  
Public views can be visited by anyone using the library

- F. In the **Columns** section of the **Create View** form, select only the following columns:
- **Item Name (linked to item wth edit)**
  - **Item Type**
  - **Total Value**

### Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Item Name (linked to item with edit menu)	1
<input type="checkbox"/>	Item Description	2
<input checked="" type="checkbox"/>	Item Type	3
<input type="checkbox"/>	Quantity	4
<input type="checkbox"/>	Item Value	5
<input checked="" type="checkbox"/>	Total Value	6
<input type="checkbox"/>	App Created By	7
<input type="checkbox"/>	App Modified By	8

- G. In the **Filter** section, choose the **Total Value** column in the **Column to Filter** drop-down list. Select **is greater than** in the **operator** drop-down field. Enter “1000” in the **Value** field.



### Filter

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)

 Show all items in this view

 Show items only when the following is true:

Show the items when column

Total Value

is greater than

1000

Value  Or

When column

None

is equal to

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

 **Group By**

Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in. [Learn about grouping items.](#)

First group by the column:

 Show groups in ascending order  
(A, B, C, or 1, 2, 3)

 Show groups in descending order  
(C, B, A, or 3, 2, 1)

Then group by the column:

 Show groups in ascending order  
(A, B, C, or 1, 2, 3)

 Show groups in descending order  
(C, B, A, or 3, 2, 1)

By default, show groupings:  
 Collapsed  Expanded

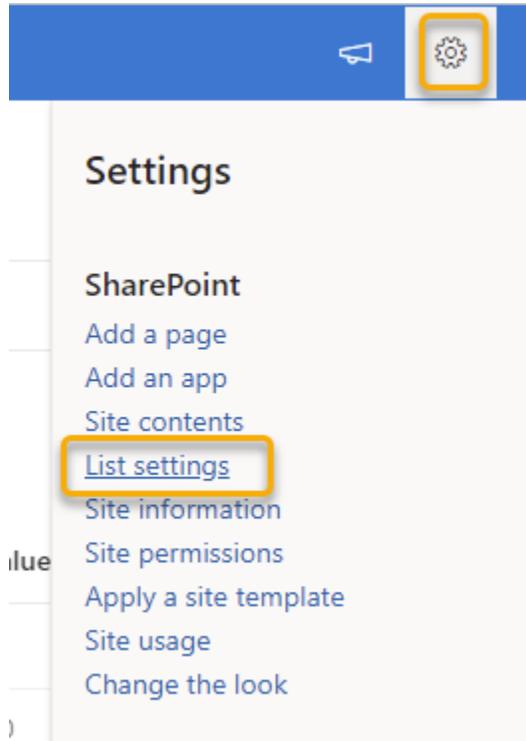
Number of groups to display per page:

- I. Take a few moments to read through the rest of the **Create View** forms options. Leave them at their default values.
- J. Click the **OK** button to save the new view and see the results.
- K. Note how the new view looks.

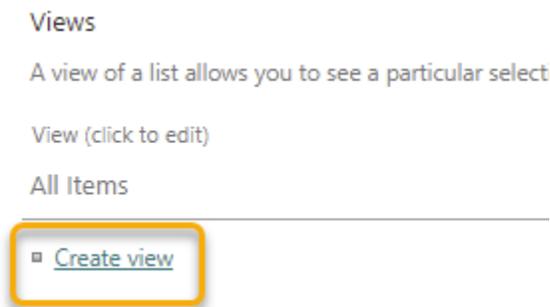
Office Inventory ☆ ☑

> Item Name	Item Type	Total Value
▼ Item Type : Equipment (2)		
Laptop	Equipment	\$18,750.00
Desk Top Computer	Equipment	\$1,250.00
> Item Type : Furniture (1)		
> Item Type : Software (1)		

2. Create a new personal view for the **Office Inventory**.
  - A. Click the **Settings** menu and then choose the **List Settings** menu item.



B. Click the **Create view** link.



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

# Settings ▸ View Type ⓘ

Choose a view type

5

 **Standard View**  
View data on a Web page. You can choose from a list of display styles.

 **Datasheet View**  
View data in an editable spreadsheet format, convenient for bulk editing.

 **Calendar View**  
View data as a daily, weekly, or monthly calendar.

 **Gantt View**  
View list items in a Gantt chart representation of how a team spends time.

Start from an existing view

▫ All Items

try

- D. Click the **Standard View** format option link.
- E. Enter “Items by type” in the **View Name** field and change the **View Audience** field set to **Create a Personal View**.

# Settings ▸ Create View ⓘ

5

## Name

Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

View Name:

Items by Type

Make this the default view  
(Applies to public views only)

## Audience

Select the option that represents the intended audience for this view.

View Audience:

Create a Personal View

Personal views are intended for your use

Create a Public View

Public views can be visited by anyone using the site

ory

rts

- F. In the **Group By** section, choose the **Item Type** column in the drop-down list.

### Group By

Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in. [Learn about grouping items.](#)

First group by the column:

Item Type

-  Show groups in ascending order  
(A, B, C, or 1, 2, 3)
-  Show groups in descending order  
(C, B, A, or 3, 2, 1)

Then group by the column:

None

-  Show groups in ascending order  
(A, B, C, or 1, 2, 3)
-  Show groups in descending order  
(C, B, A, or 3, 2, 1)

By default, show groupings:

- Collapsed  Expanded

Number of groups to display per page:

30

- G. Click the **OK** button to save the new view and see the results.
- H. Note how the new view is selected. It is only available to you.

Office Inventory ☆ ☰

> Item Name	Item Description	Item Type
Item Type : Equipment (2)		
Laptop	Sales Person Laptops	Equipment
Desk Top Computer	Front Desk Check in	Equipment
Item Type : Furniture (2)		
Item Type : Software (1)		

## Conclusion

In this lesson, you have learned:

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

# LESSON 6

## Working with Sites

---

### Topics Covered

- Site Templates.
- “Out-of-the-Box” Site Templates.
- Creating a new site using Site Templates.
- Creating a Project site.
- Creating a Team 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 SharePoint 365.

- Team Site
- Project Site

Additional Site Templates can be made available in any installation of SharePoint by creating custom templates.

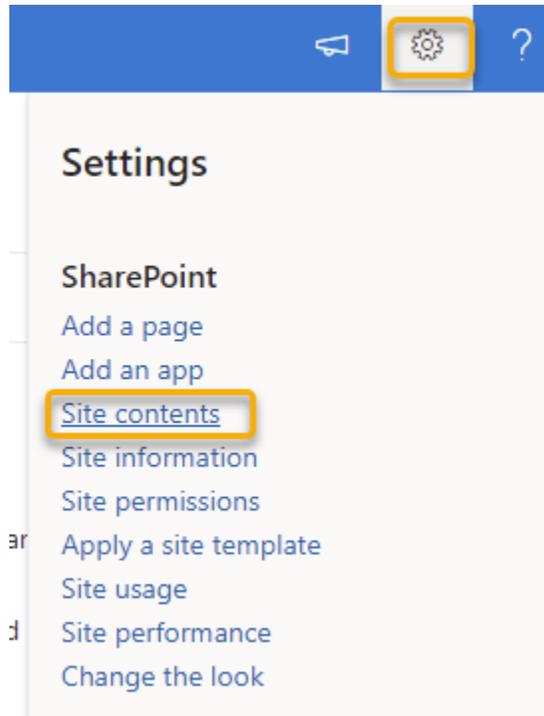


## 6.2. Creating Sites

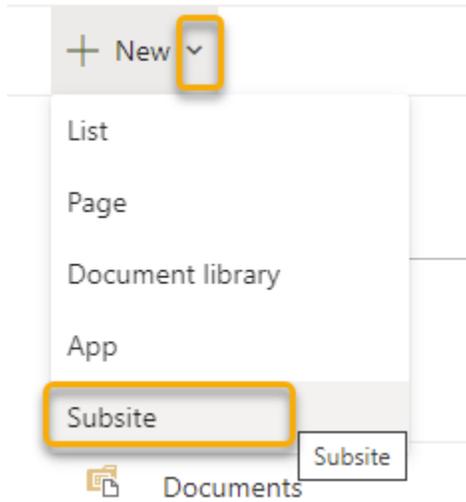
### ❖ 6.2.1. Creating a Team Site

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 **Settings** menu.



- B. Click the **new** link and choose **Subsite**.



NOTE: If you use a different template you may need to go to the Subsites section and click **New Subsite**.

- C. Type “Marketing” in the **Title** field and “marketing” in the **URL name** field. Ensure that the **Team Site(No Microsoft 365 Group)** template is selected in the **Select a template:** option.

# Site contents ▸ New SharePoint Site

s

Title and Description

Title:

Description:

Web Site Address

URL name:

Template Selection

Select a language:

Select a template:

- Collaboration
- Enterprise
- Duet Enterprise
- Team site (no Microsoft 365 group)**
- Team site (classic experience)
- Project Site

dry

rts

s

- 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

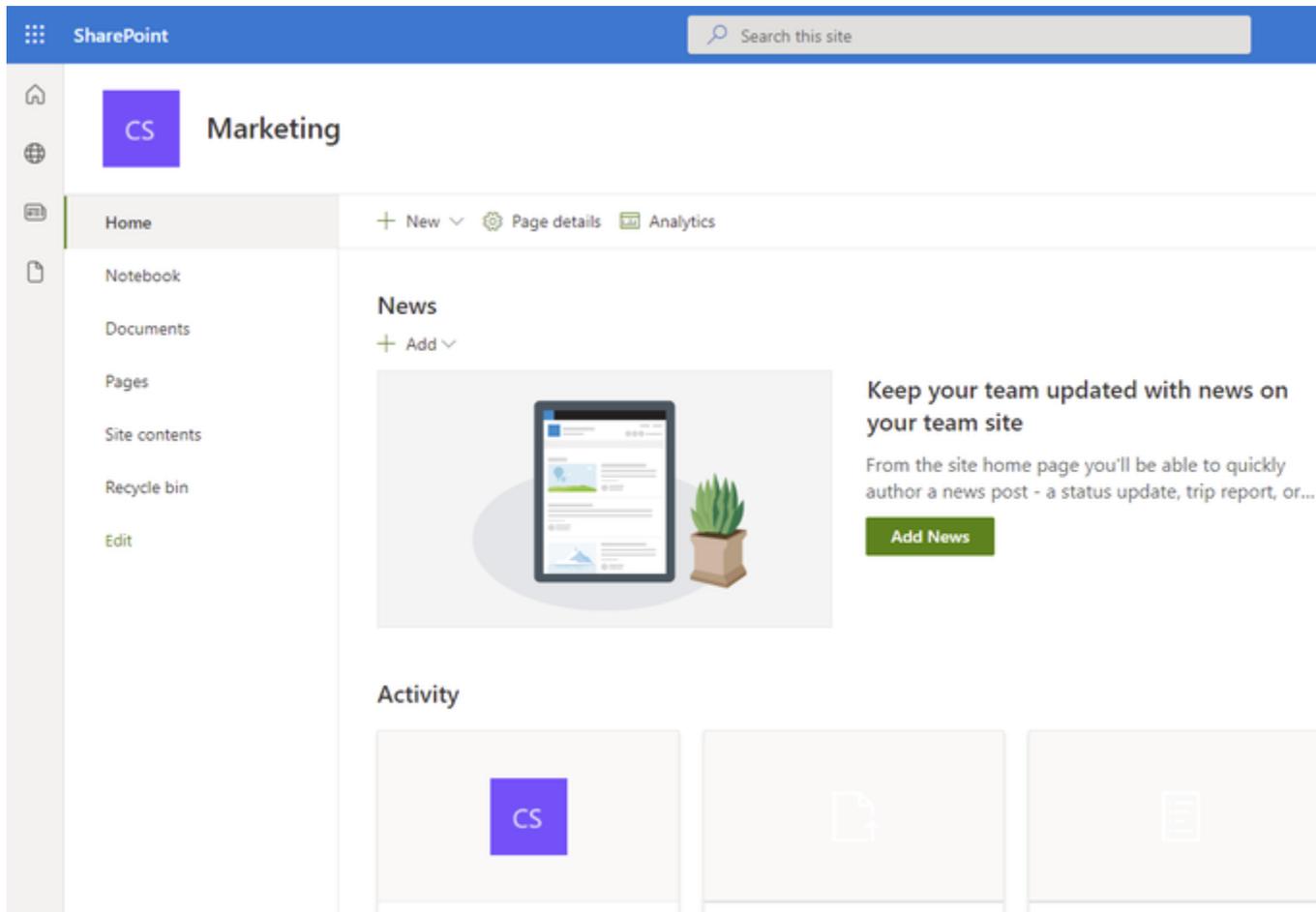
Create

Cancel

## Navigation Settings

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.

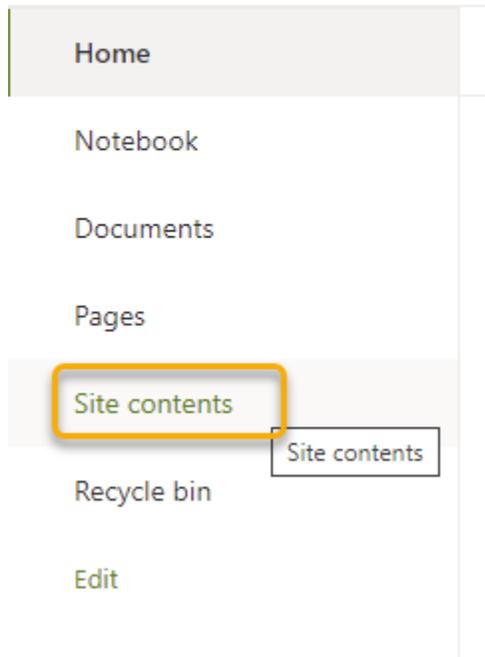
- E. You will automatically be navigated to the **Home** page of the new **Marketing** site. If you have not done much customization to the parent site it's hard to tell that this is a different site.



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.



## Marketing

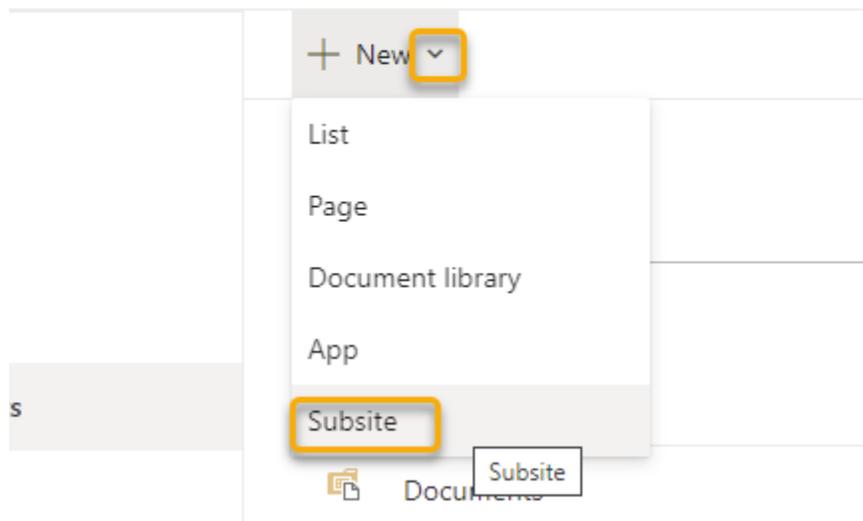


- B. Take a few moments to look through the Lists and Libraries created by default from the **Team Site** template.

 Name	Type	Items
 Documents	Document library	0
 Site Assets	Document library	1
 Power BI	App	
 Site Pages	Page library	1

3. Create a new child site to **Marketing** using the **Project Site** template.
  - A. Click the **new** link at the top of the page and choose **Subsite**.

## Marketing



- B. Type “Project X” in the **Title** field and “projectx” in the **URL name** field. Choose **Project Site** from Select a Template. Click the **Create** button to complete the process.

## Site contents ▸ New SharePoint Site

**Title and Description**

Title:

Description:

**Web Site Address**

URL name:

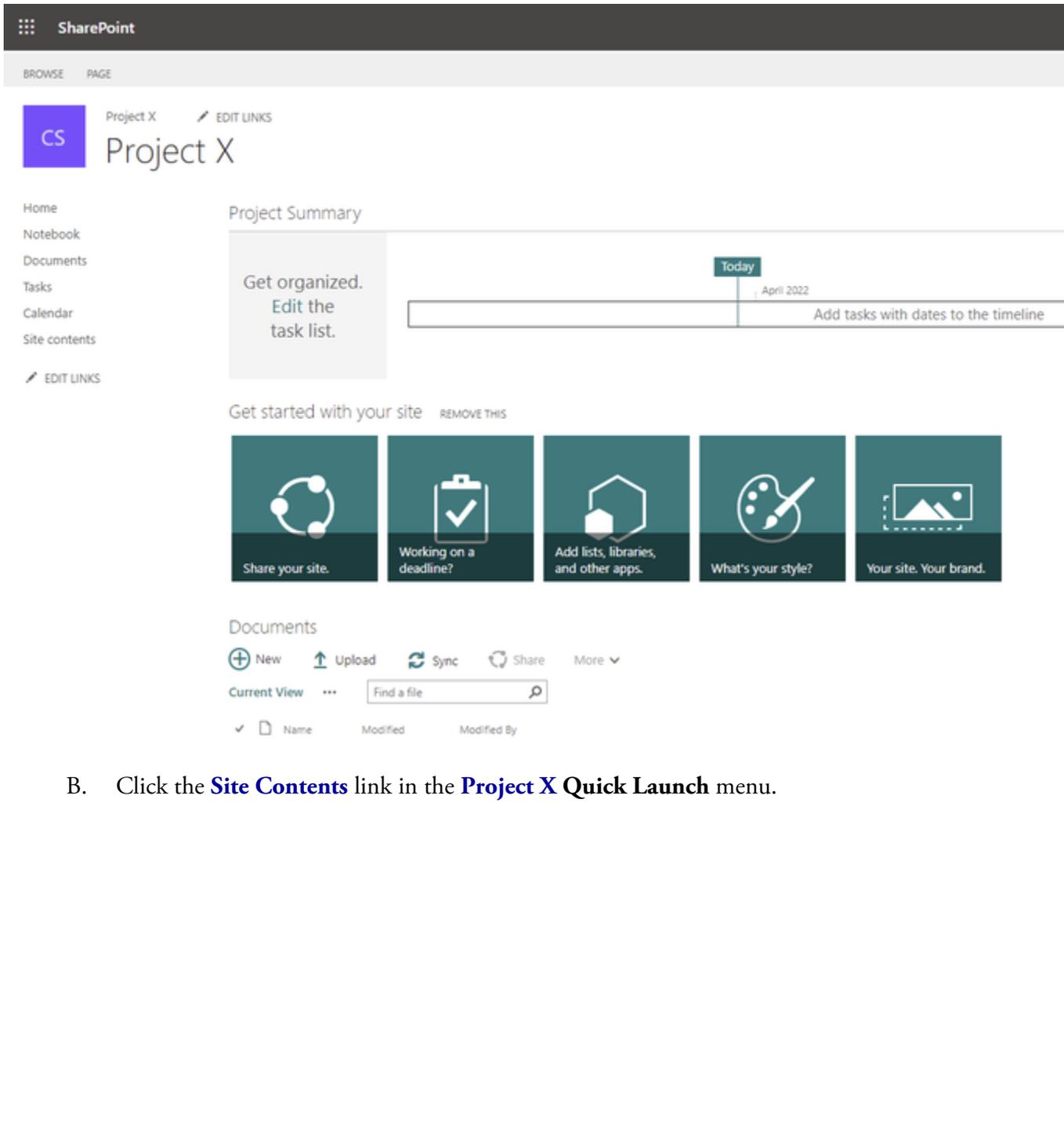
**Template Selection**

Select a language:

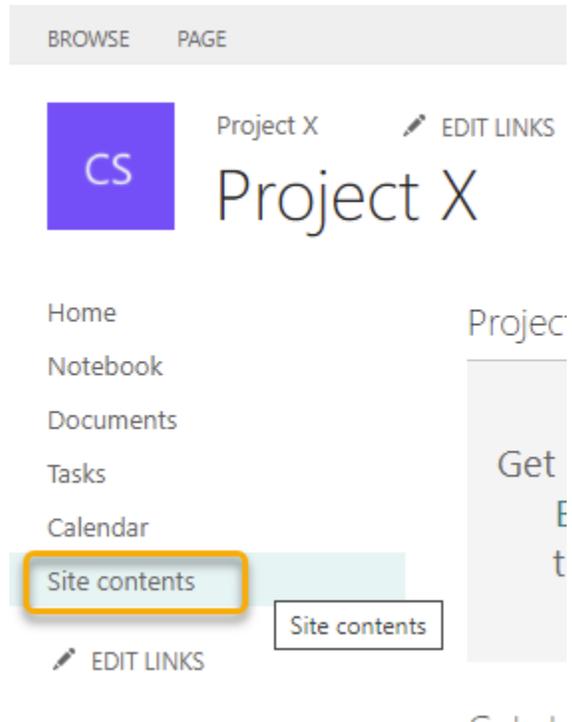
Select a template:

- Collaboration
- Enterprise
- Duet Enterprise
- Team site (no Microsoft 365 group)
- Team site (classic experience)
- Project Site**

4. Explore what comes with the **Project Site** template.
- A. Note that the **Project 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.

Project X

**CS** Project X

---

- Home
- Notebook
- Documents
- Tasks
- Calendar
- Site contents
- Recycle bin
- Edit

+ New ▾

---

**Contents** Subsites

---

 Name	Type
 Documents	Document library
 Site Assets	Document library
 Calendar	Events list
 MicroFeed	List
 Power BI	App
 Tasks	Tasks list

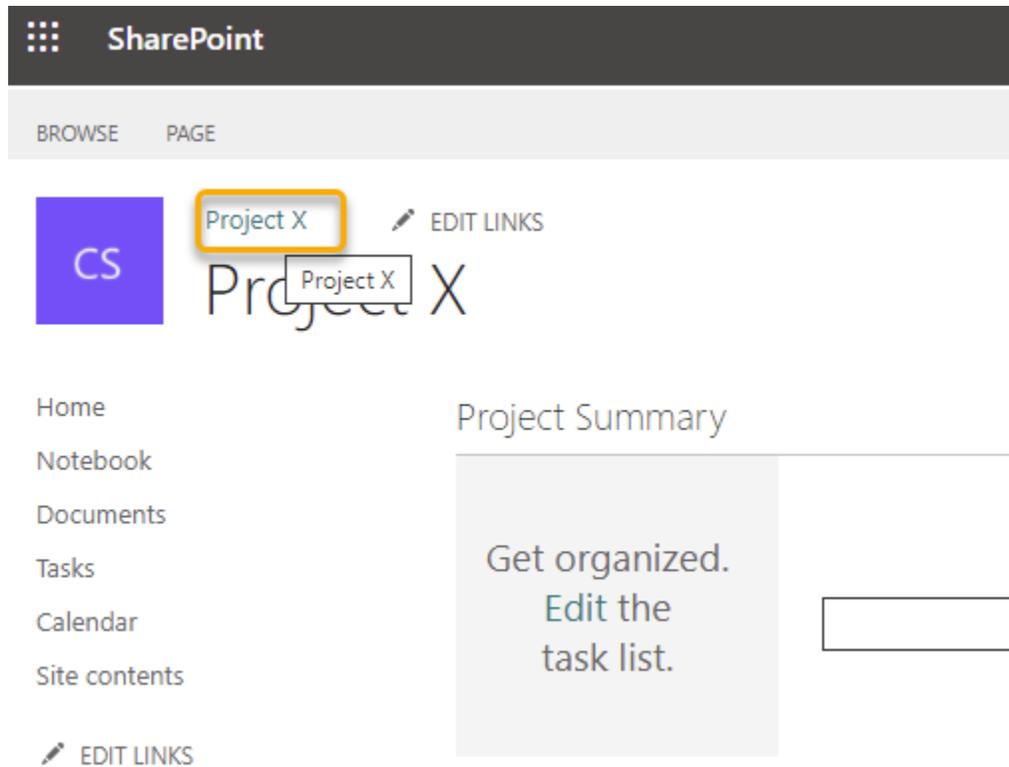
---

## 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.

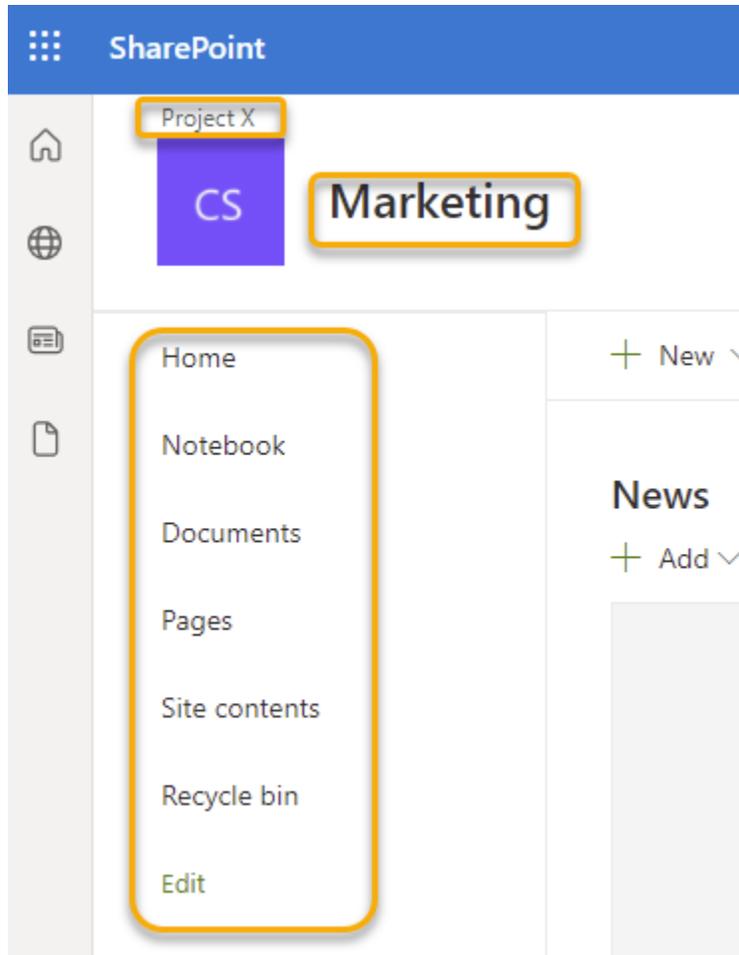
1. Verify that both the **Project X** and the **Marketing** sites have separate top link bars and Quick Launches.
  - A. Verify that you are currently in the **Project X** home page by clicking the **Project X** link in the top link bar.



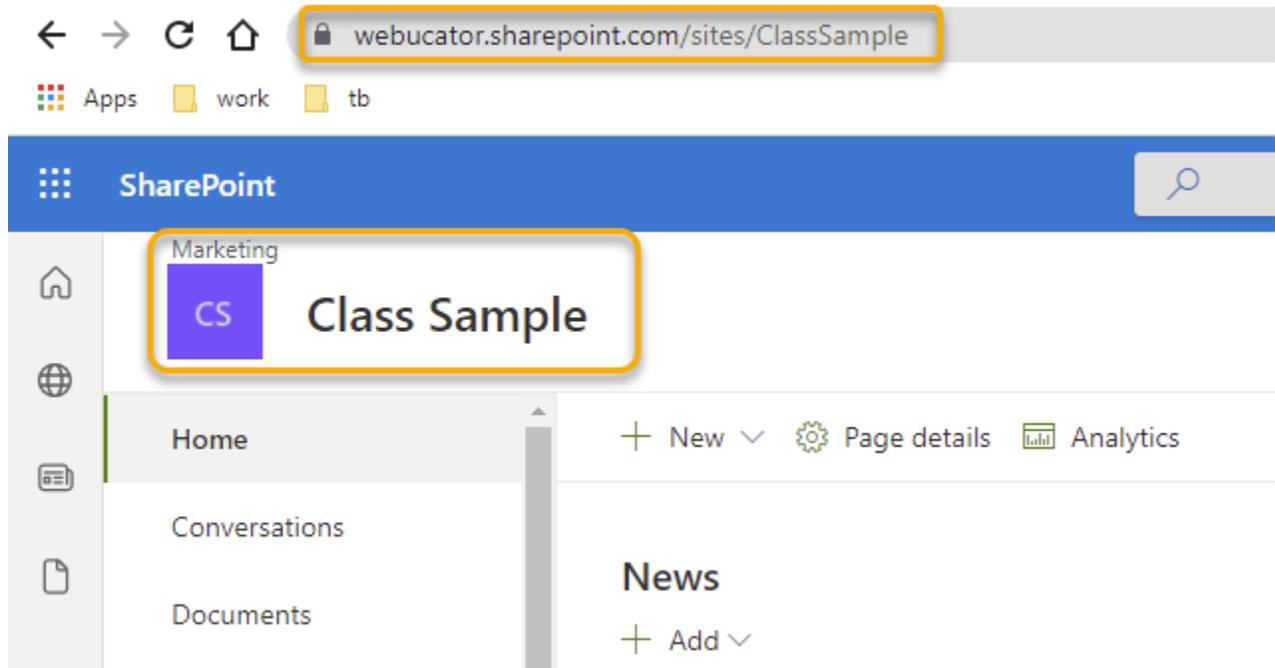
- B. Note that there are no additional links in the **Top link bar** of the **Project X** site.
- C. There is currently no obvious way to navigate back to the parent site **Marketing** from the child site **Project X**. To navigate back to **Marketing**, remove the text in browser's address field back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



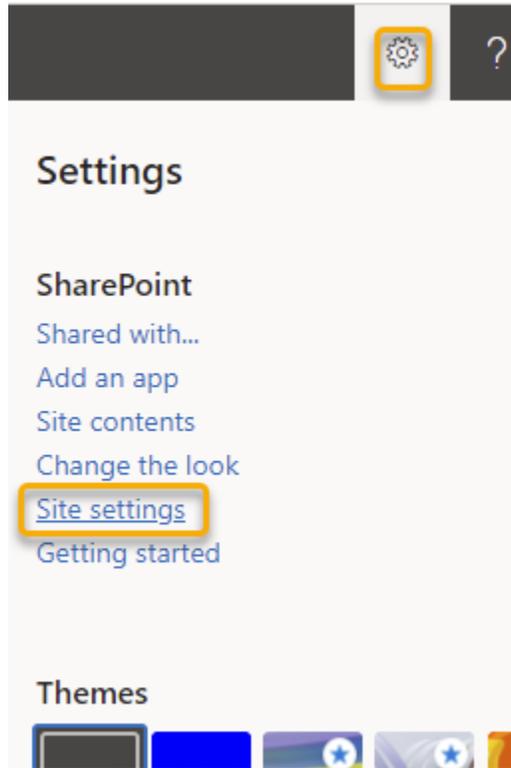
- D. Note that now the **Top link bar** has a **Marketing** link as well as a **Project X** link. Also note that the **Quick Launch Menu** lists only content from this site.



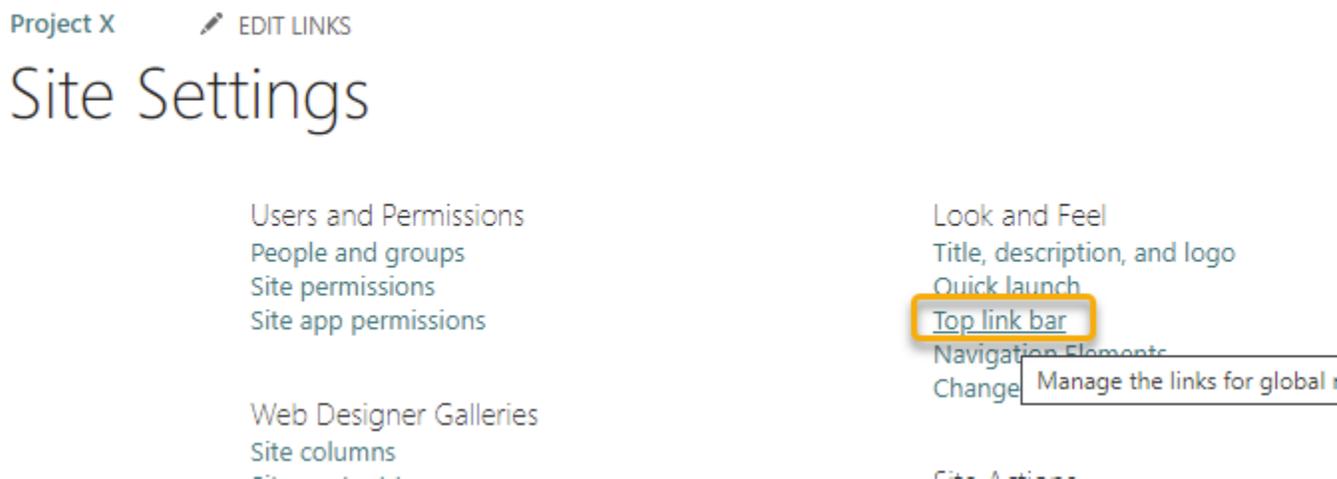
- E. Just as before, there is yet no obvious way to navigate to the parent site of **Marketing**. To navigate back to **Sample Site**, the root site, remove the text in browser's address field back to **before** "Marketing" as shown in the screen capture.



- F. Note that the root parent site currently has the two links in the **Top link bar** as shown in the image. The **Sample 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.

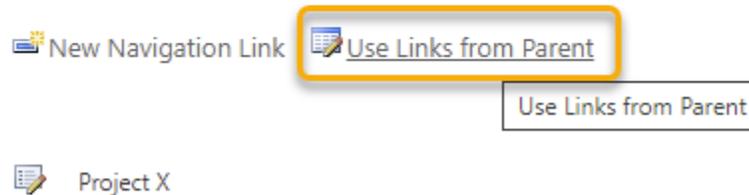


- C. Click the **Top link bar** link under the **Look and Feel** group on the **Site Settings** page.

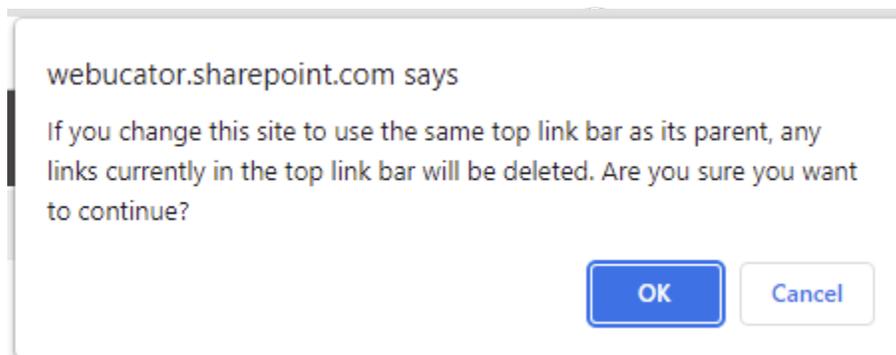


- D. Click the **Use Links from Parent** link on the **Top link bar** settings page.

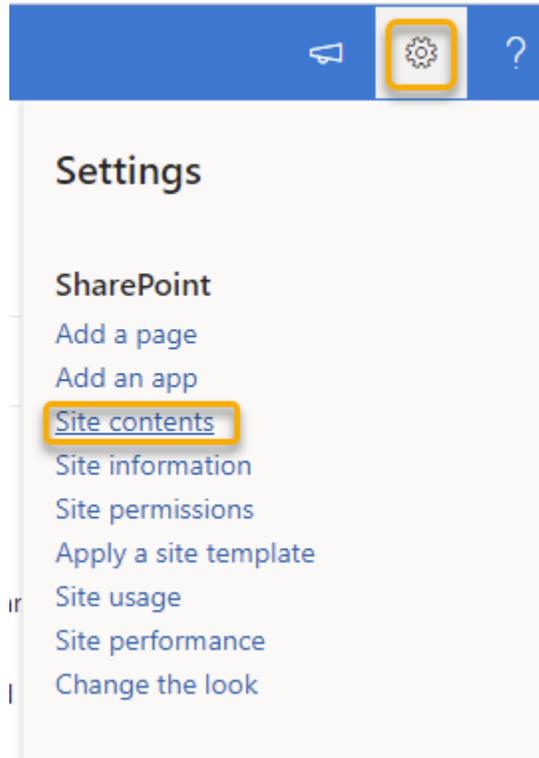
## Site Settings ▸ Top Link Bar ⓘ



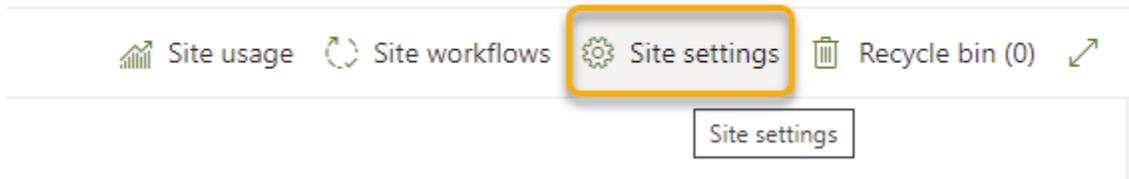
- E. Click the **OK** button on the **Message from web page** dialog window warning us that our current **Top link bar** links will be deleted.



- F. Verify that now the **Project X** site has the same **Top link bar** as the parent **Marketing** site.
- G. Note we are not done yet, we will need to manually navigate back to Marketing for the next step.
3. Configure the **Marketing** site to share the **Top link bar** of its parent site.
- A. Within the **Marketing** site, click the **Settings** button and select the **Site Contents** link from the menu.



B. Click Site Settings from the top menu.



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

# Site Settings

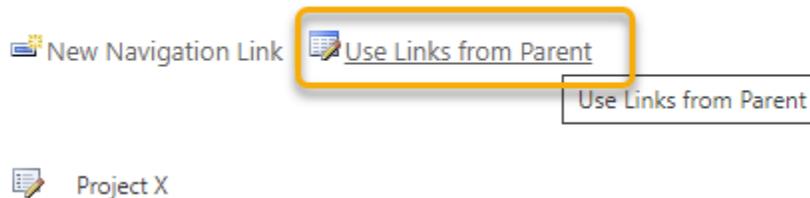
Users and Permissions  
People and groups  
Site permissions  
Site app permissions

Look and Feel  
Title, description, and logo  
Quick launch  
**Top link bar**  
Navigation  
Change the look

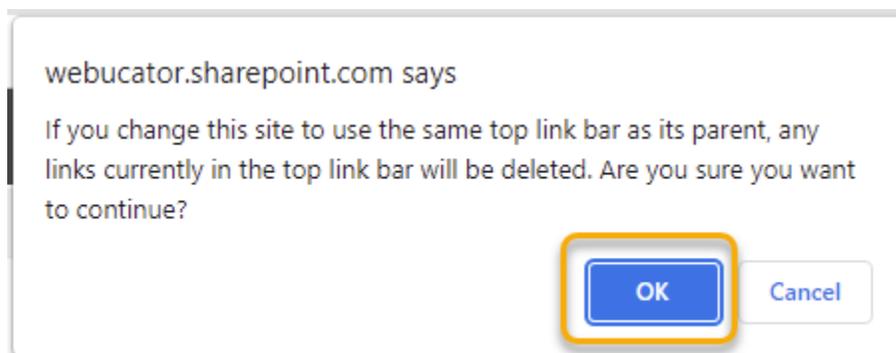
Web Designer Galleries

- D. Click the **Use Links from Parent** link on the **Top link bar** settings page.

## Site Settings › Top Link Bar ⓘ



- 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.



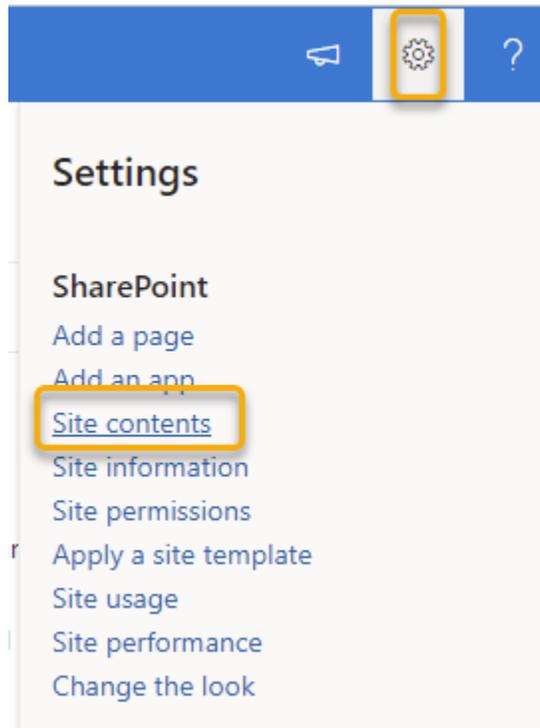
- F. Verify that now the **Marketing** site has the same **Top link bar** of the parent. Note: We will edit the home page of the Marketing site later and you will learn to create links. Links can help you customize and add in navigation that might be missing.

# Exercise 7: Creating Team Sites

 10 to 15 minutes

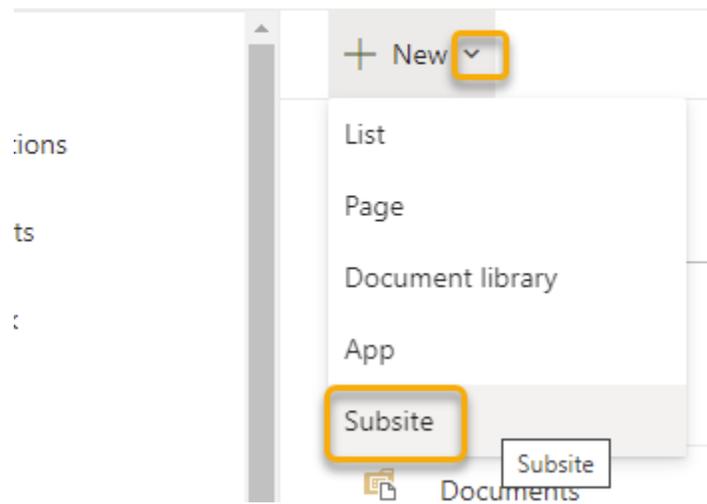
In this exercise, you will create a new site based on the **Team Site** template in the class sample site. In addition, you will test and modify the navigation options from parent site to child site.

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



- B. Click the **new** link and choose **Subsite**.

## Class Sample



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

# Site contents ▸ New SharePoint Site

5

Title and Description

Title: Accounting

Description:

Web Site Address

URL name: https://webucator.sharepoint.com/sites/ClassSample/acc

Template Selection

Select a language: English

Select a template: Collaboration Enterprise Duet Enterprise Team site (no Microsoft 365 group) Team site (classic experience) Project Site

ory

rts

;

- D. Scroll down and note the options available for permissions and navigation. Set Navigation Inheritance to **Yes** 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



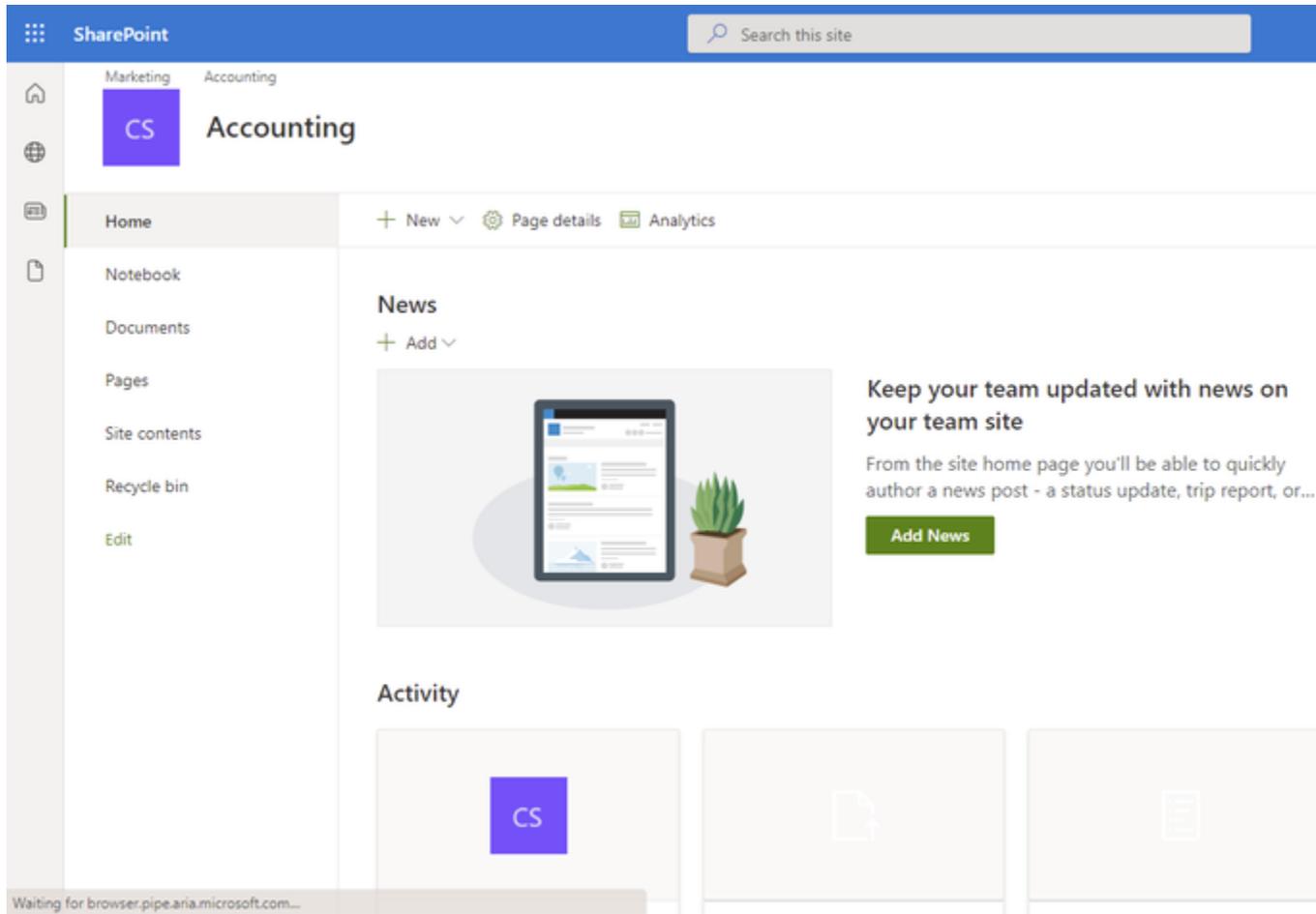
Use the top link bar from the parent site?

- Yes
- No

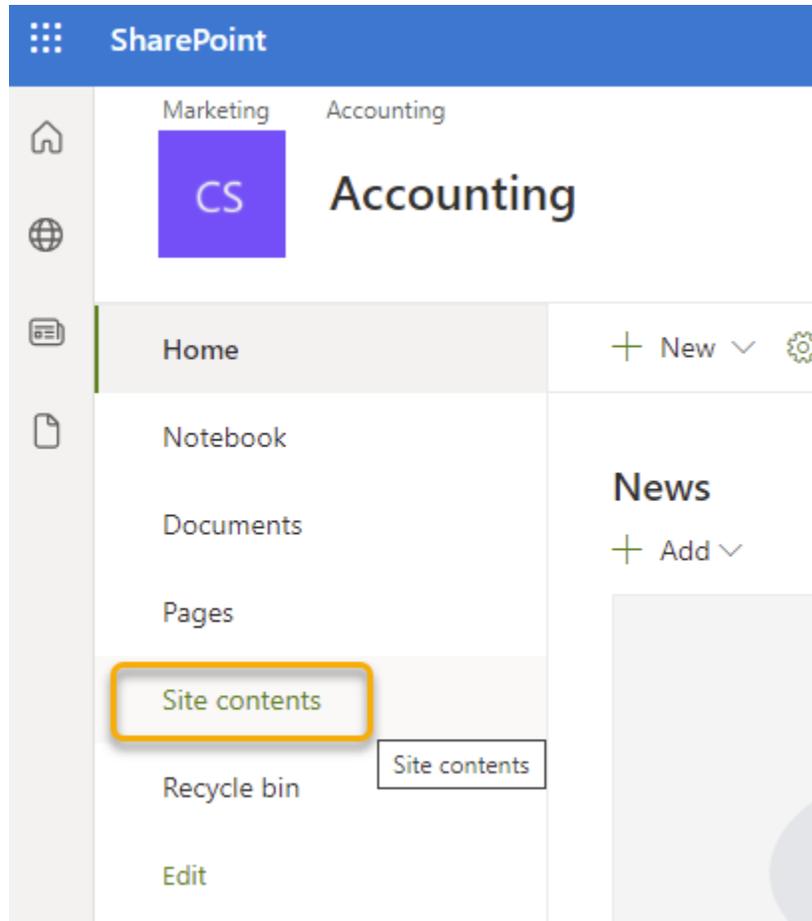
Create

Cancel

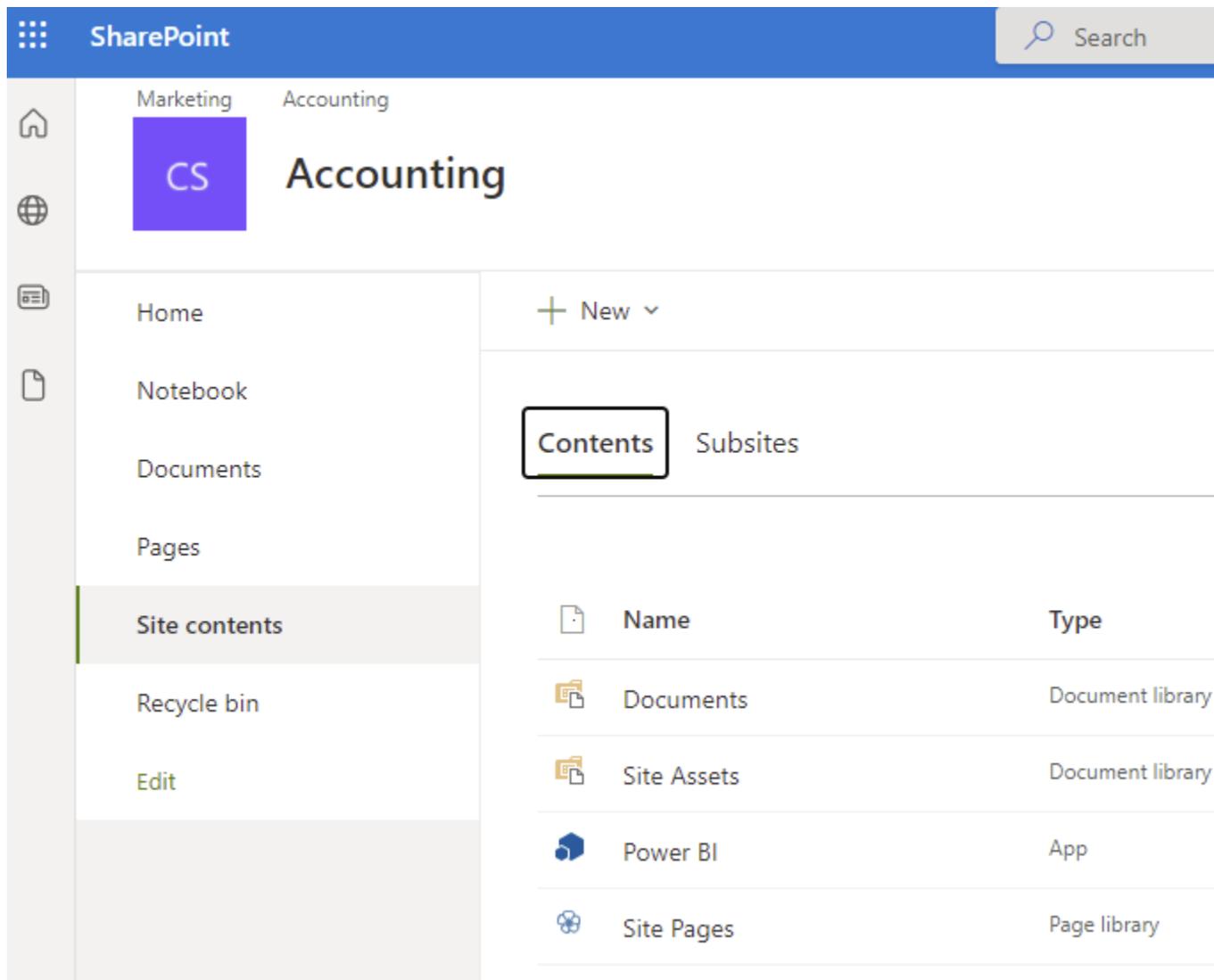
- E. You will automatically be navigated to the **Home** page of the new **Accounting** site. If you have not done much customization to the parent site it's hard to tell that this is a different site.



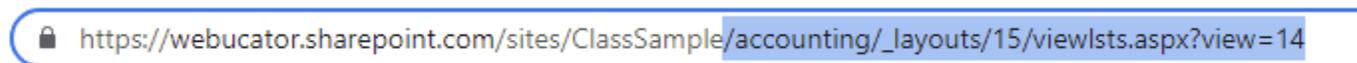
2. Explore the content of the new child **Accounting** Team Site.
  - A. In the **Accounting** site, click the **Site Contents** link in the **Quick Launch** menu.



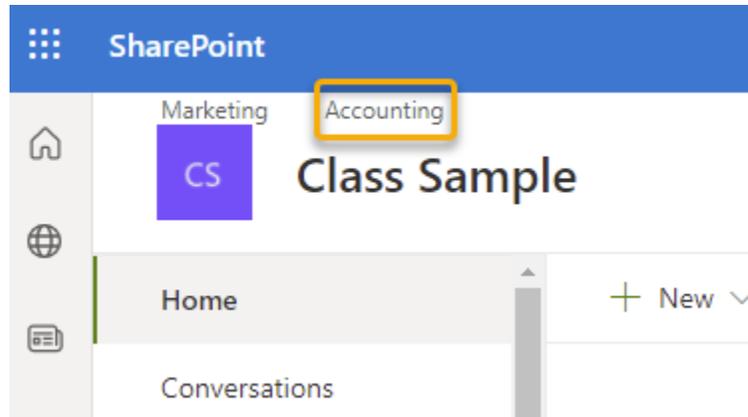
- B. Take a few moments to look through the Lists and Libraries created by default from the **Team Site** template.



3. Navigate back to the root parent site.
  - A. There is currently no obvious way to navigate back to the parent site class sample 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.



## 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 SharePoint.
- How to create a new site using Site Templates.
- How to create a Project site.
- How to create a Team site.
- How to manage the sites listed in the top link bar.



# LESSON 7

## Page Content

---

### Topics Covered

- Site pages.
- Wiki pages.
- Adding content to the Team Site Home page.
- Changing the layout of the Team Site Home page.
- Creating a Site page.

### Introduction

SharePoint offers a couple of ways to add content to the pages in a site. The latest technique and the one implemented by the Team Site template is through site style pages. Other methods include wiki pages and the use of Web Parts and Web Part pages which have been a part of SharePoint since the beginning and are not used much anymore.



## 7.1. Site Pages

### ❖ 7.1.1. Editing the Team Site Home Page

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

1. Navigate to the team site in your browser.
2. Click **Edit**.



★ Following

Draft saved 3/30/2022

 Edit

 Republish



Quick links

3. Click News. You will have options for this Web Part. Please review.



 Save as draft  Undo |  Discard changes  Page details  Analytics



News

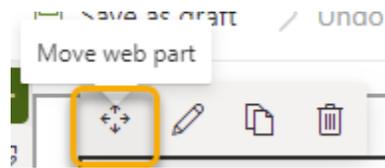
+ Add ▾



Keep your team updated with your team site

From the site home page you'll be able to author a news post - a status update.

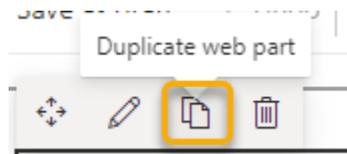
A. Move Web Part.



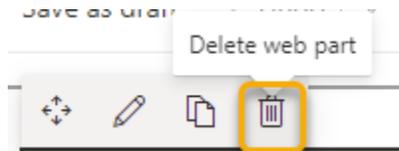
B. Edit Web Part.



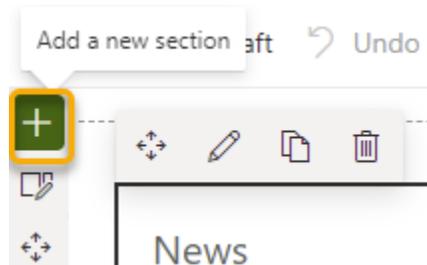
C. Duplicate Web Part.



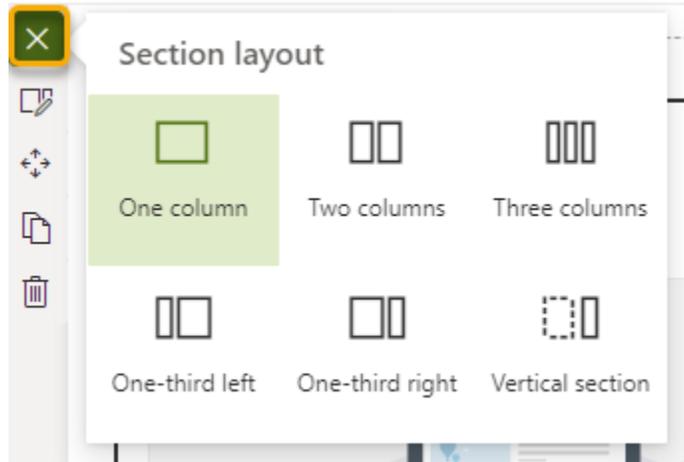
D. Delete Web Part.



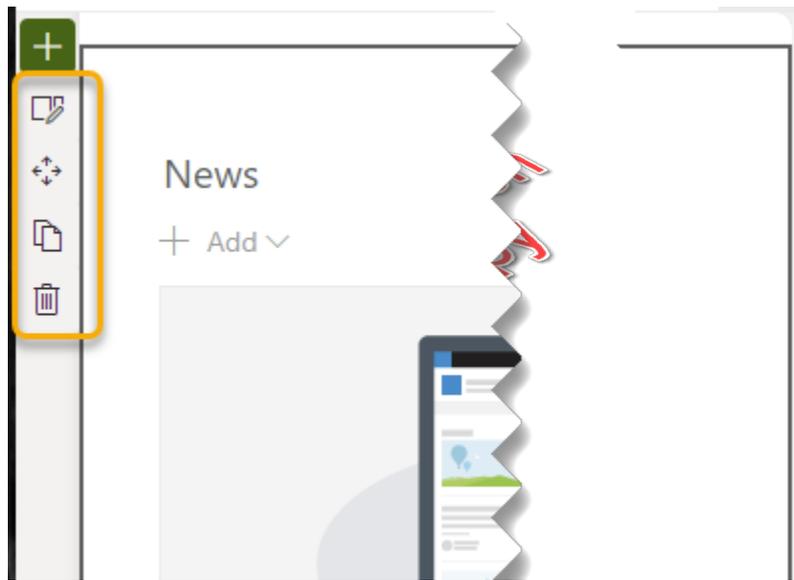
4. Notice the + to add a section. Click to see options and you may choose a section layout.



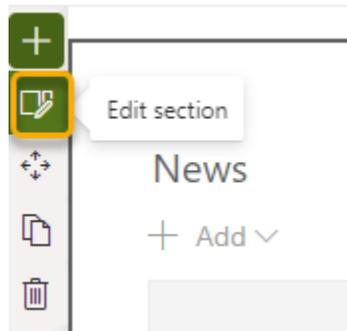
5. Click the X to cancel.



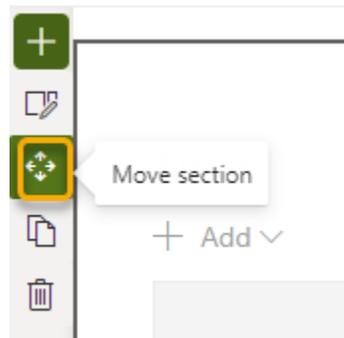
6. Click an existing section and review the options.



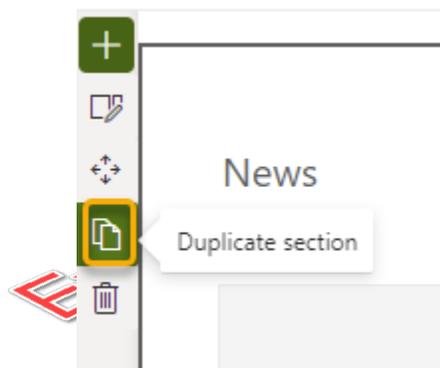
A. Edit Section.



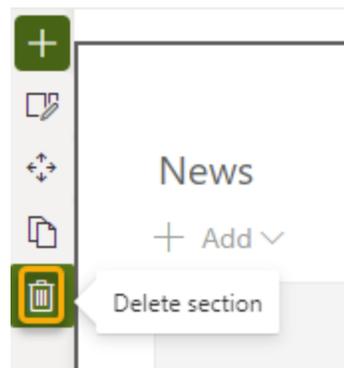
B. Move Section.



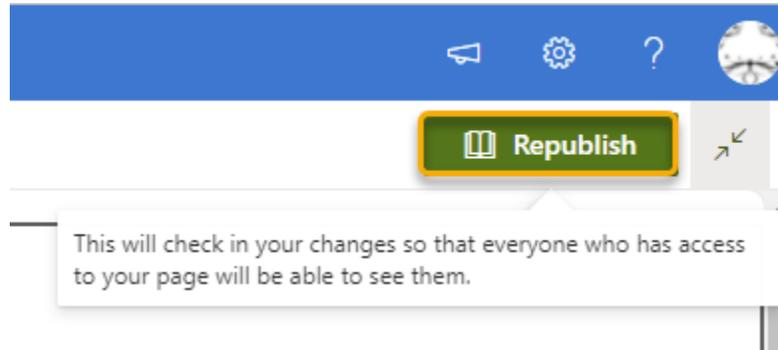
C. Duplicate Section.



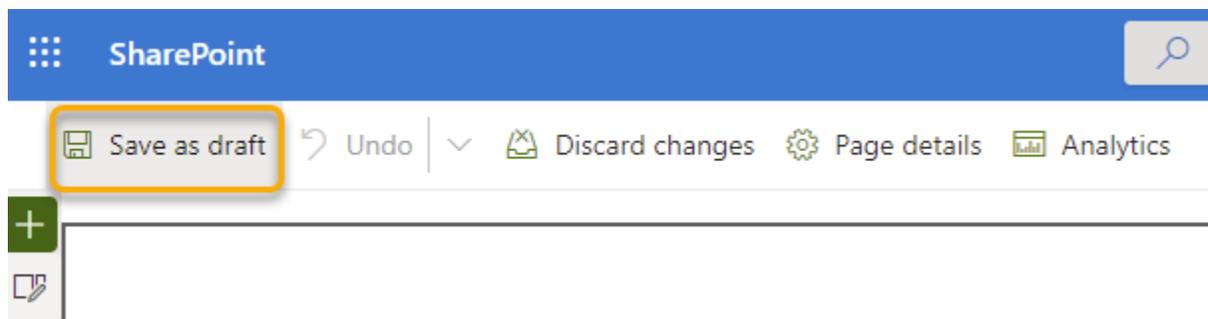
D. Delete Section.



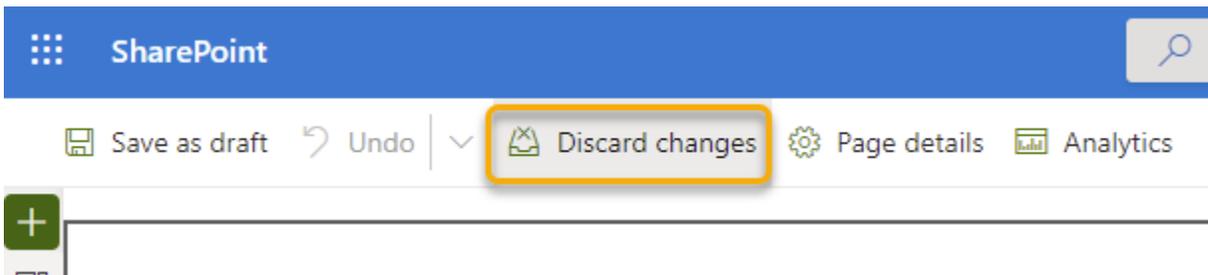
7. Once you make changes you will need to Republish to save and make the new updates live to the audience.



- Another option is to **Save as Draft** which will save the changes but the audience does not see the new updates yet. Only those with security rights to see draft status files.



- Changes may also be discarded by clicking **Discard Changes** to return the page to pre-edit content.

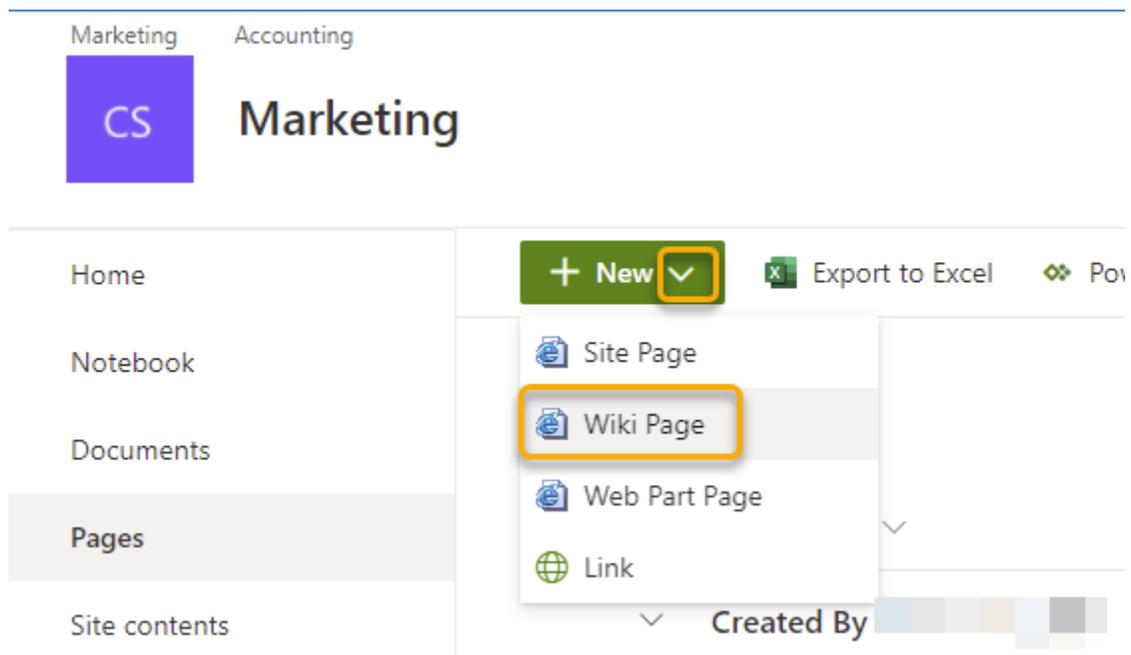


## 7.2. Wiki Library Pages

### ❖ 7.2.1. Create a new Wiki Page

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

1. Navigate to the **Marketing** team site in your browser.
2. In **Pages Library**, click **New** and choose **Wiki page**.



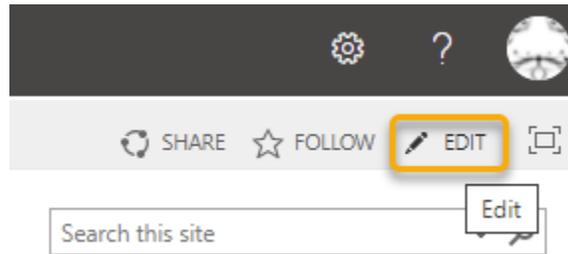
3. Name page "Sample page" and click **Create**.

## New Item

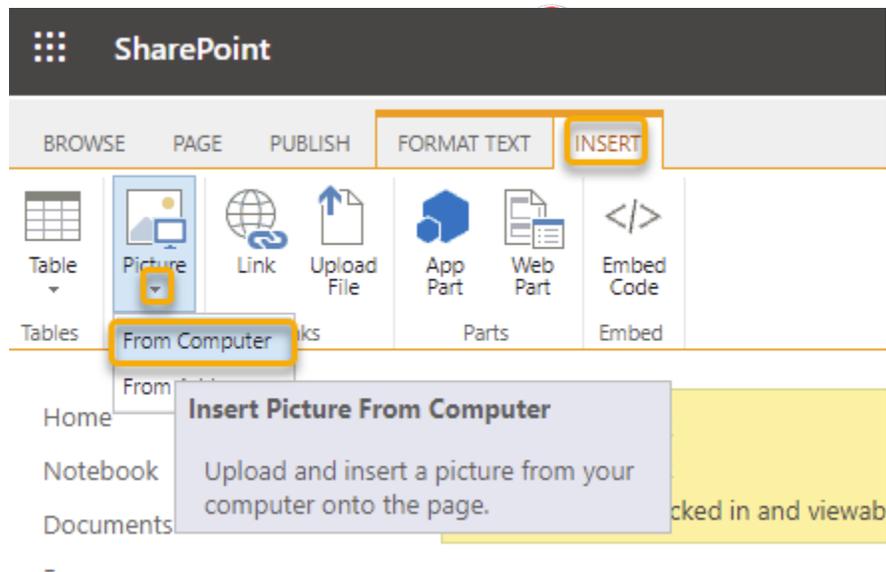
New page name:

Find it at <https://webucator.sharepoint.com/sites/ClassSample/marketing/SitePages/SamplePage.aspx>

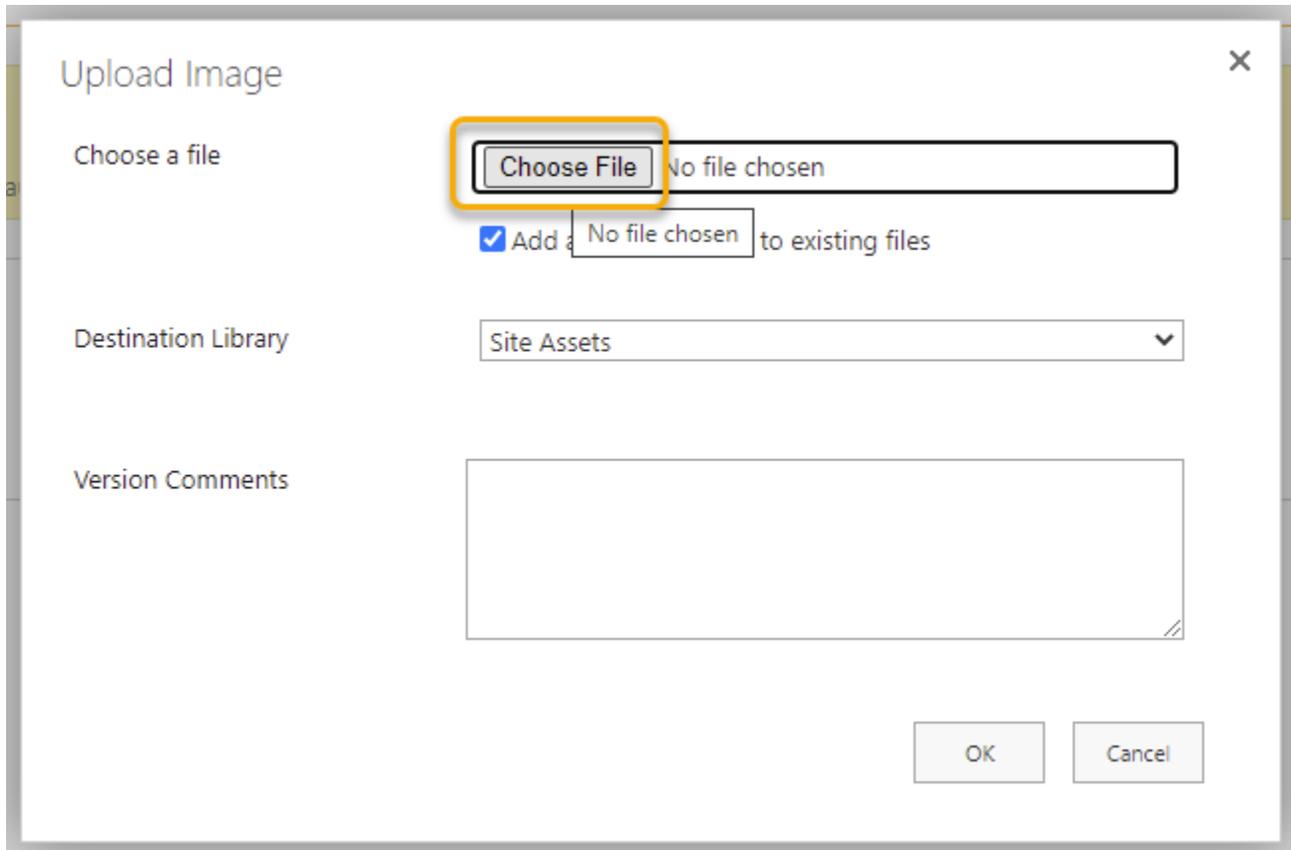
4. You might need to click the **EDIT** link located below the **Settings** cog icon if your page was already made.



5. Click the **INSERT** tab to open the toolbar. Click the **Picture** drop-down link and choose **From Computer** in the list.



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



7. Navigate to the course files folder you downloaded and select the ocean . jpg file or choose an image you have available. Click the **Open** button to complete the file selection.
8. Note image may be to large. Use image tab to make the image the correct size.

SharePoint

BROWSE PAGE PUBLISH **FORMAT TEXT** INSERT **IMAGE**

Change Picture ▾ Address: /sites/ClassSample/marke  
Alt Text: ocean.jpg Image Styles ▾ Position ▾  
Select Properties Styles Arrange Size

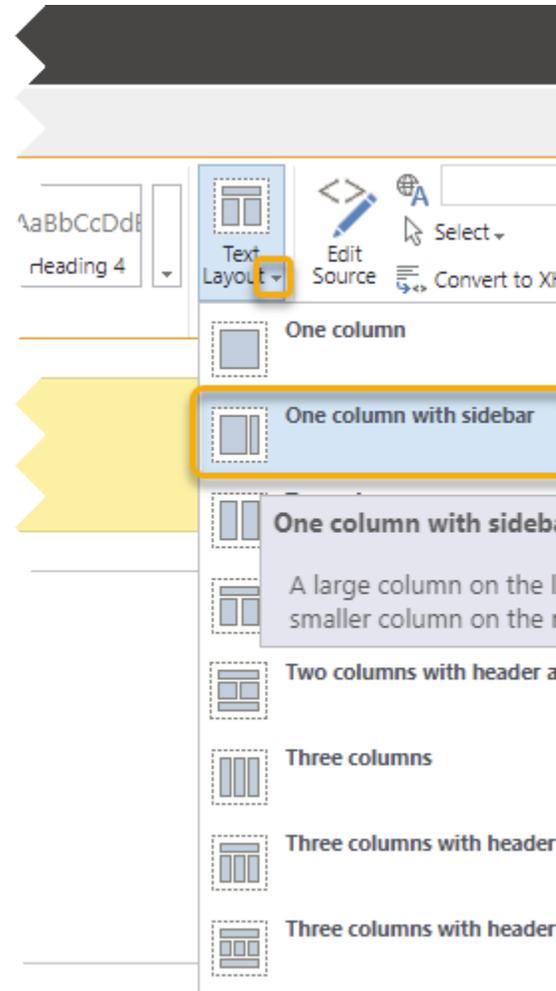
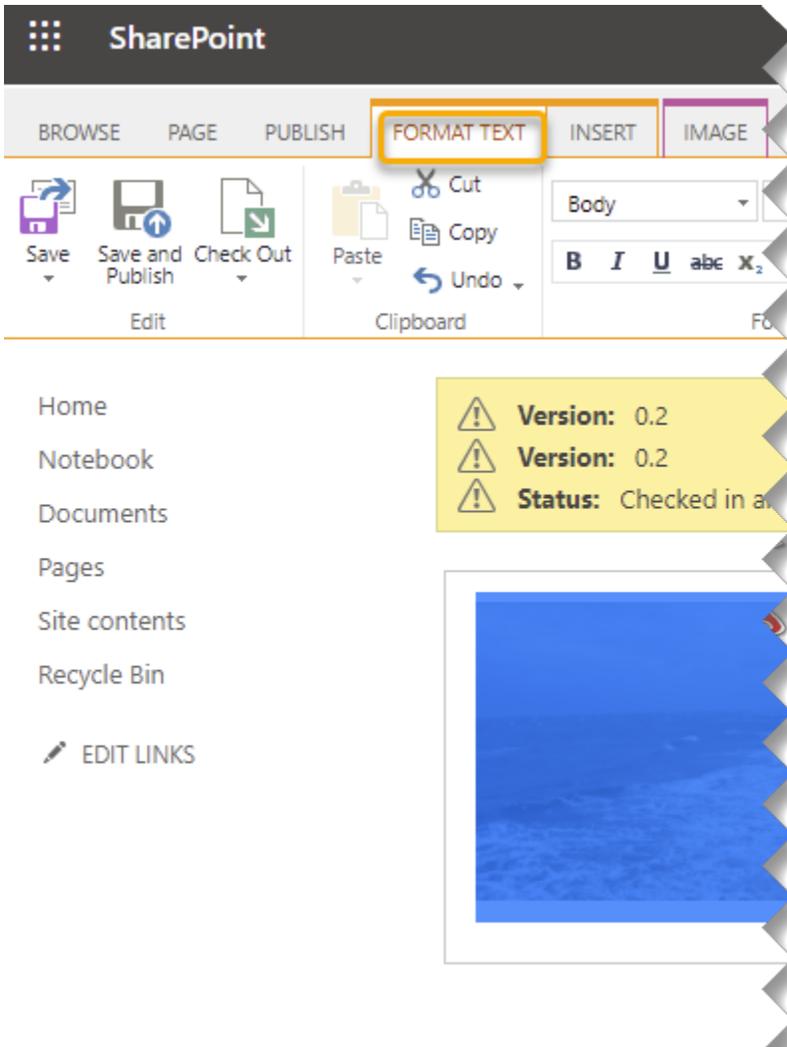
Horizontal Size: 200 px  
Vertical Size: 150 px  
 Lock Aspect Ratio

Home  
Notebook  
Documents  
Pages  
Site contents  
Recycle Bin  
EDIT LINKS

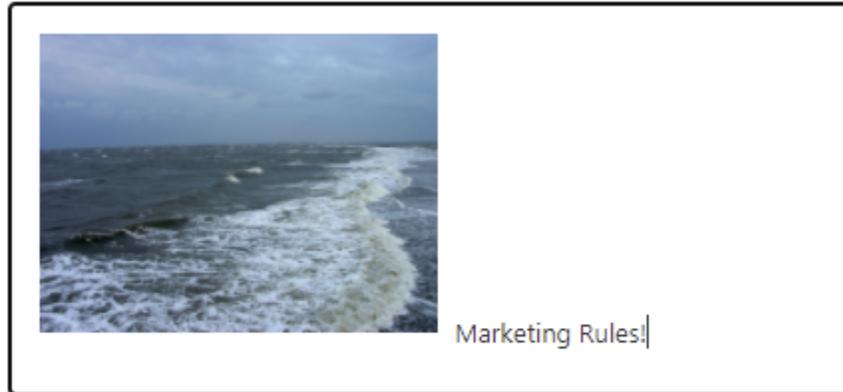
⚠ **Version:** 0.2  
⚠ **Version:** 0.2  
⚠ **Status:** Checked in and viewable by authorized users.



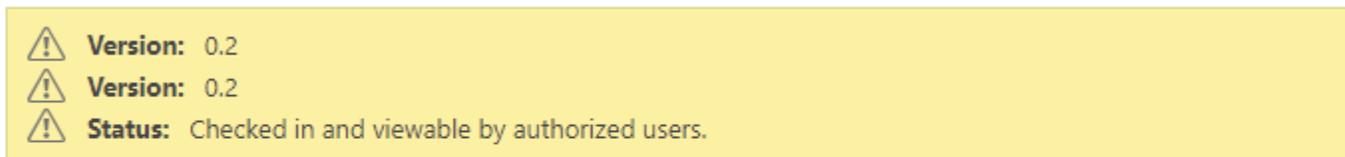
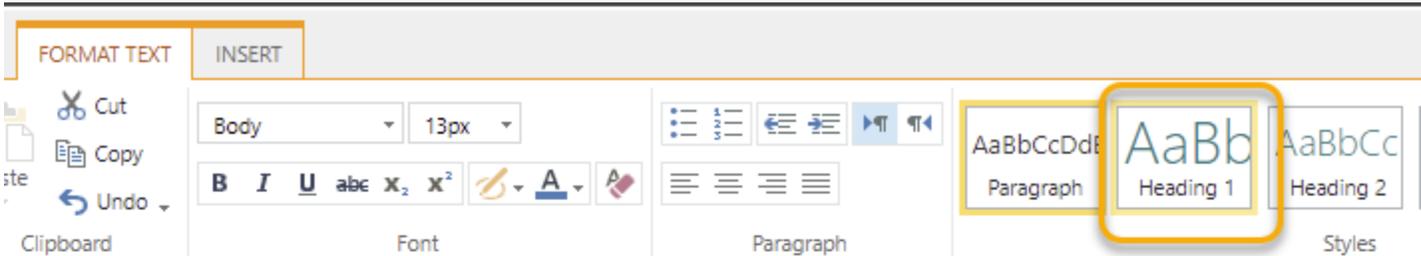
9. Click the **OK** button to complete the image upload. Note that the file will be loaded to the **Site Assets** library by default.
10. With the **Marketing** site's new page still in edit mode, click the **Format Text** tab to open the toolbar. Click the **Text Layout** drop-down button and select **One column with sidebar** from the menu of options.



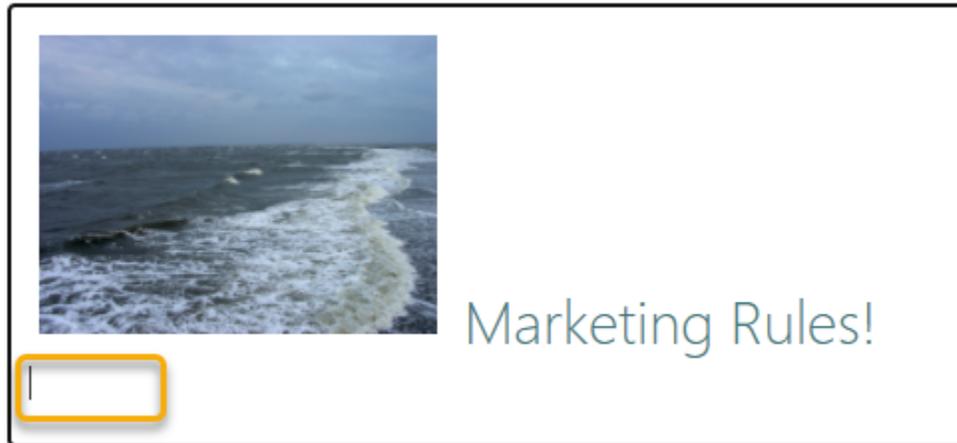
11. Add text above the image added earlier by hovering and click just to the left of the image so that the insertion point is located right next to the image. Type the following text to the left of the image: Marketing Rules!



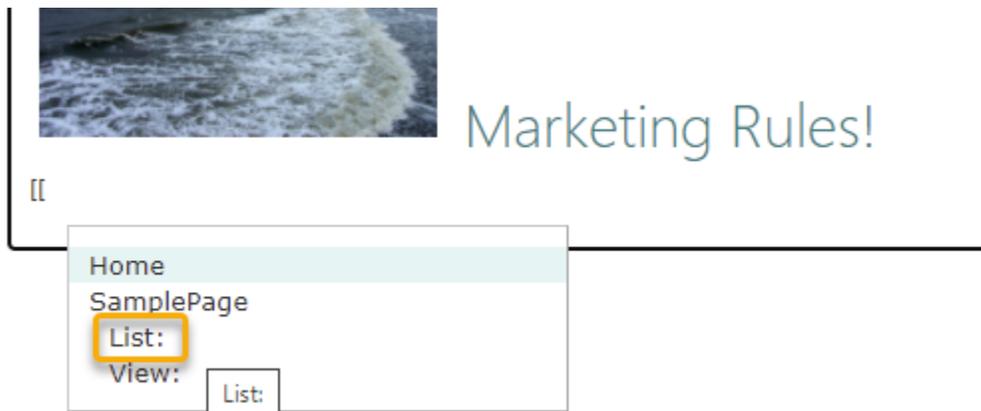
12. Highlight the text we just typed, “Marketing Rules!” and click the **Heading 1** option from the **Styles** area of the **Format Text** toolbar.



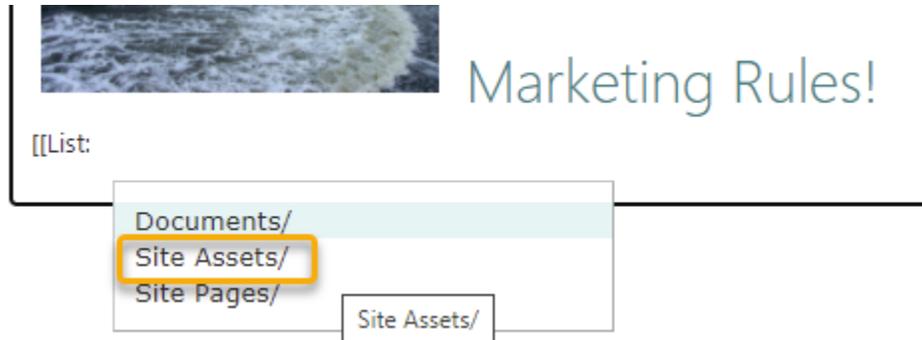
13. Add a link to the new, make sure page is still in edit mode hover and click to add your insertion point just below the “Marketing Rules!” text.



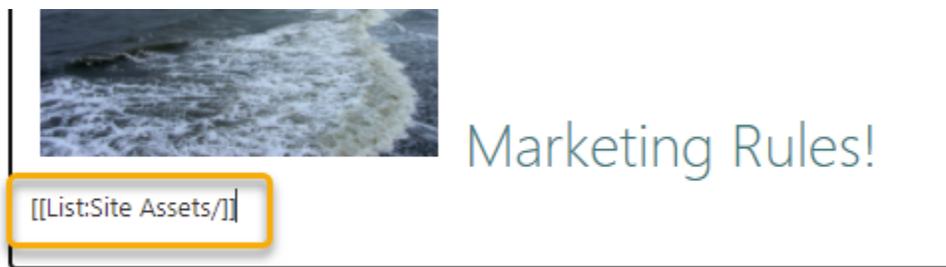
14. On the new line type the following: []. A menu will open after you type the second “[”, select **List:** from the menu.



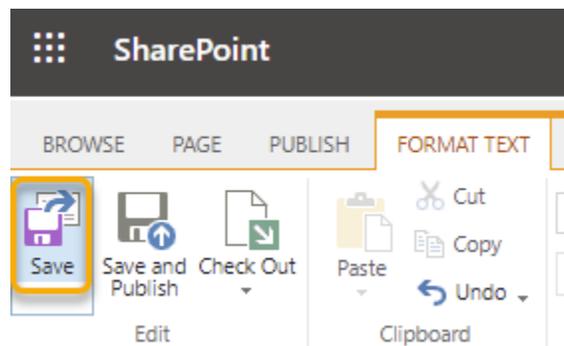
15. From the second menu, select **Site Assets/** from the list.



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



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



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



Marketing Accounting

# SamplePage

- Home
- Notebook
- Documents
- Pages
- Site contents
- Recycle Bin
- EDIT LINKS

**Version:** 0.3  
 **Status:** Checked in and viewable by authorized users.



## Marketing Rules!

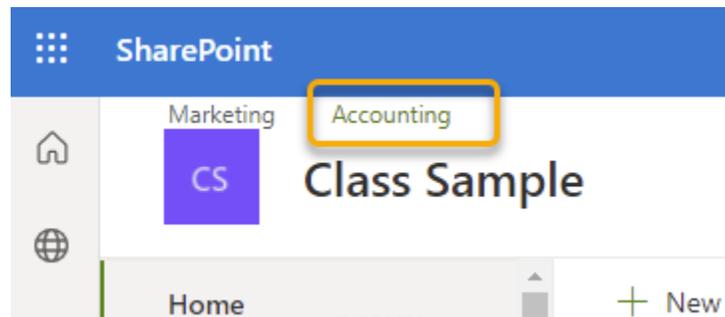
Site Assets

# Exercise 8: Working with Site Pages

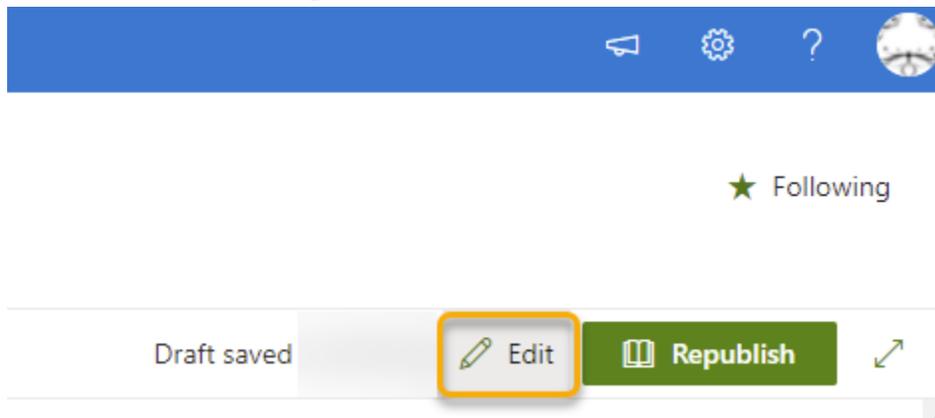
🕒 15 to 25 minutes

In this exercise, you will edit the home page for the Accounting site.

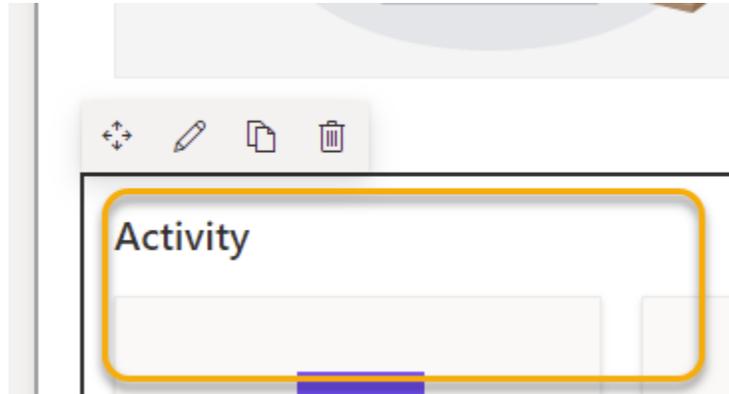
1. Go to the **Accounting** site.



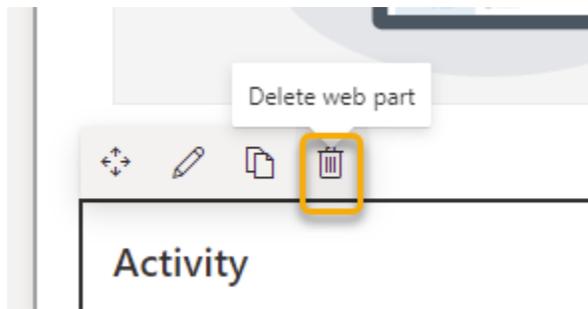
2. Click **Edit** to enter edit mode.



3. Remove Activity Webpart from the home page.
  - A. Click Activity area.

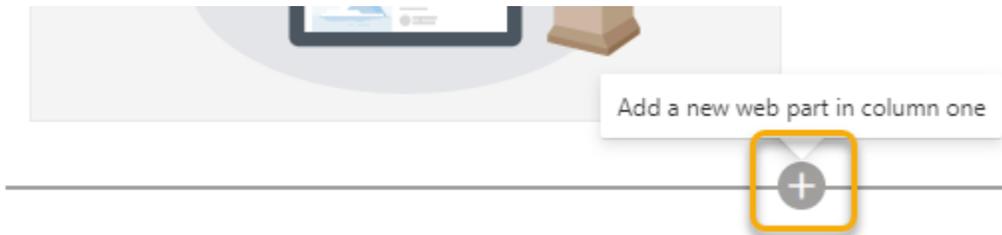


B. Delete Webpart.

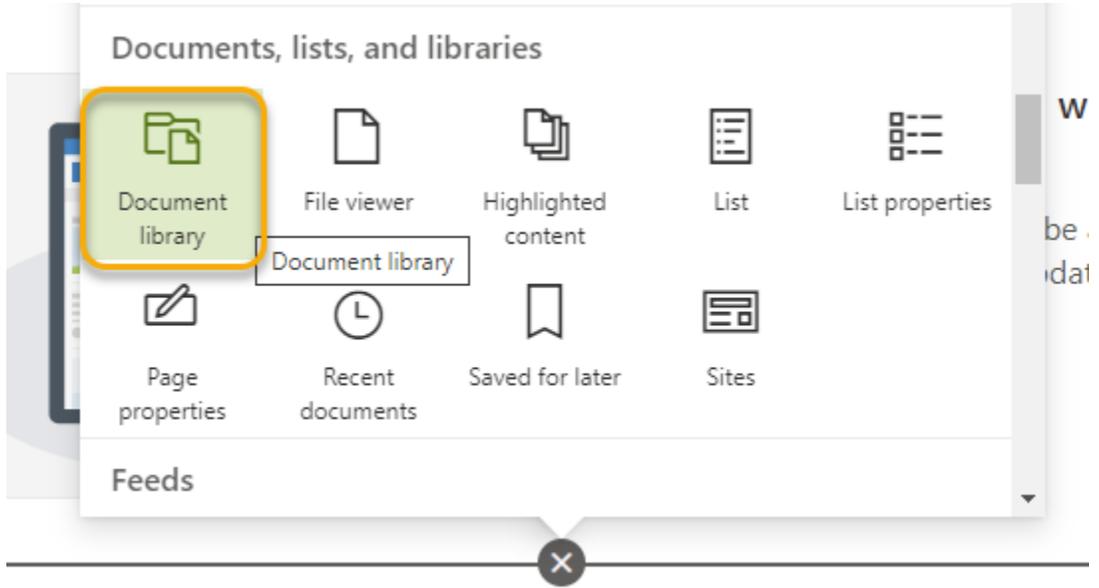


4. Add a new Webpart.

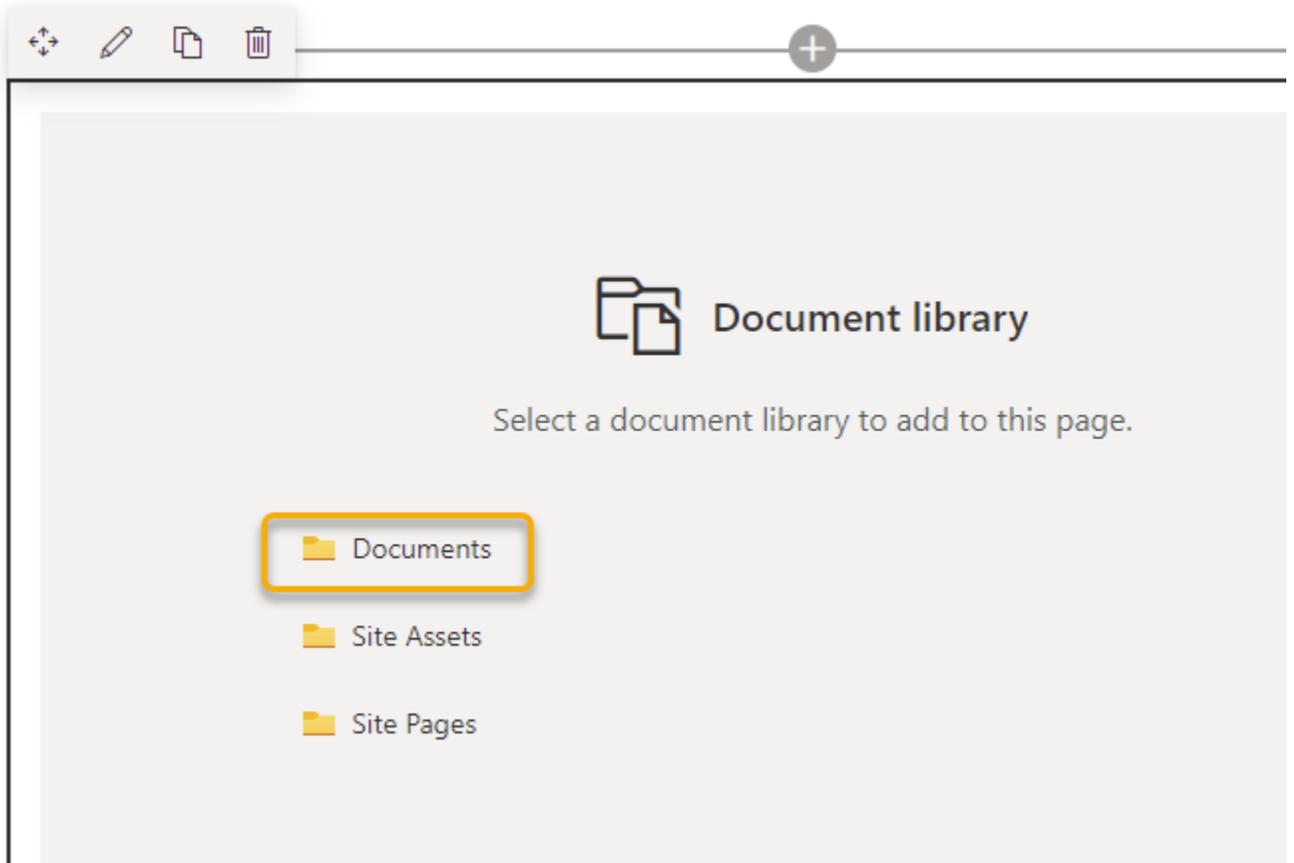
A. Locate and click the +. Hover where you want to add the webpart and the + will appear if a webpart may be added here.



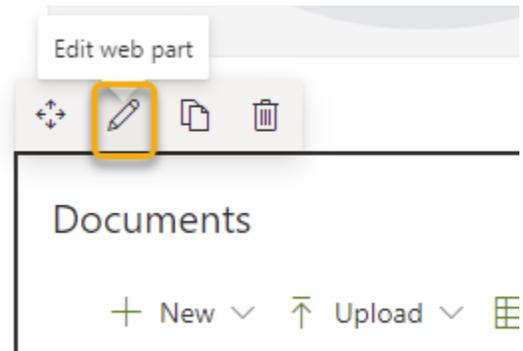
B. Scroll down to locate and click Document Library.



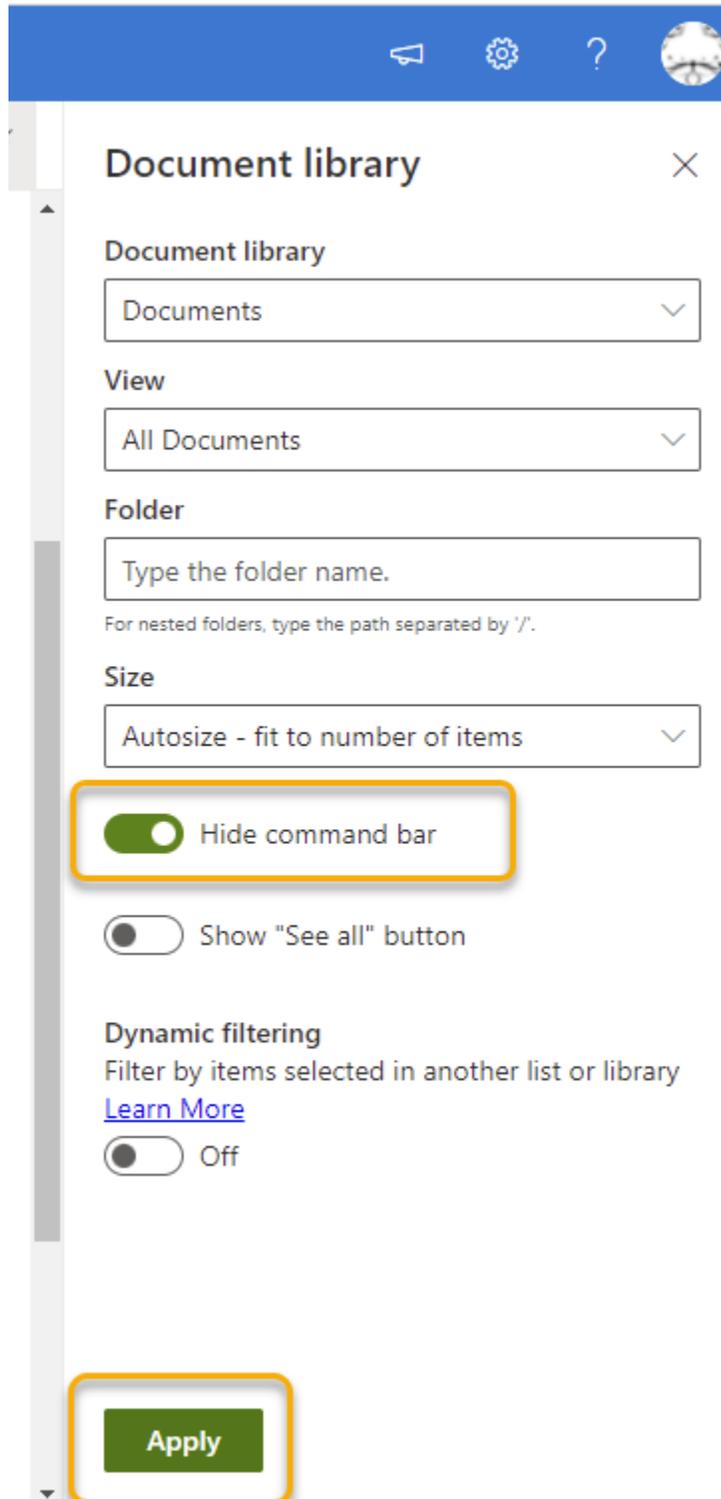
C. Choose one of the Document Libraries available.



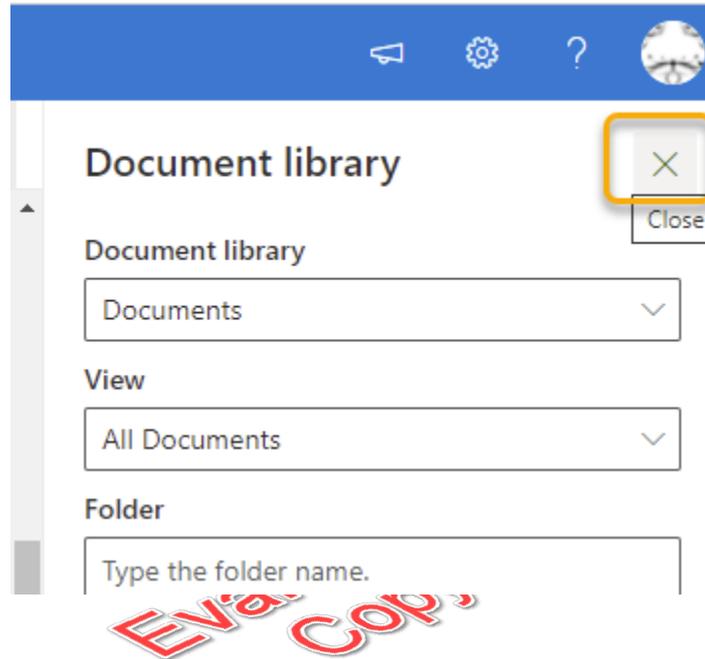
D. Edit webpart.



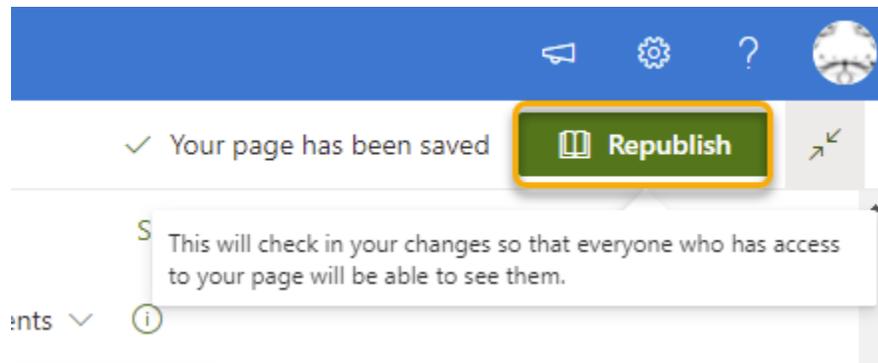
E. Hide Comand bar and click Apply.



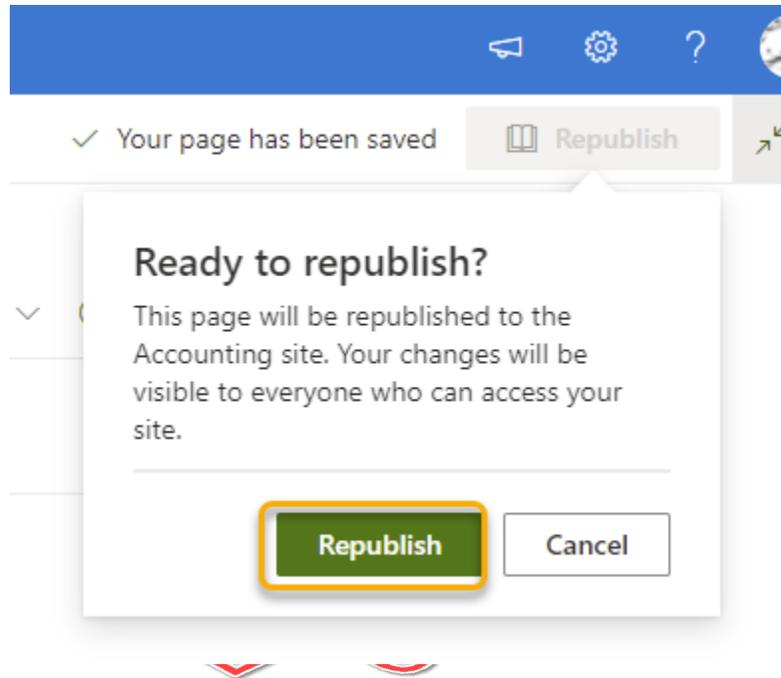
F. Close Document Library options.



5. Republish page.



6. Confirm message box and click Republish.



## Conclusion

In this lesson, you have learned:

- What site pages are.
- What wiki pages are.
- How to add content to the Team Site Home page.
- How to change the layout of the Team Site Home page.
- How to create a Site page.

# LESSON 8

## Site Columns and Content Types

---

### Topics Covered

- Site Columns.
- Content Types.
- Site Columns.
- Content Types.
- Creating a document template for a Content Type.
- Assigning a Content Type to a list or library.
- Creating new items based on a custom Content Type.

### Introduction

One method of customizing SharePoint, in a way that can be reused throughout the site or site collection or even the whole farm, is to create Site Columns and Content Types. Site columns are the simplest element; they are essentially the same as list and library columns except that you create them at the site level and then they can be used throughout that site and any child site. Content Types are a combination of Site Columns as well as additional settings and information such as document templates and workflows. Content Types, once created, can then be linked to lists and libraries.



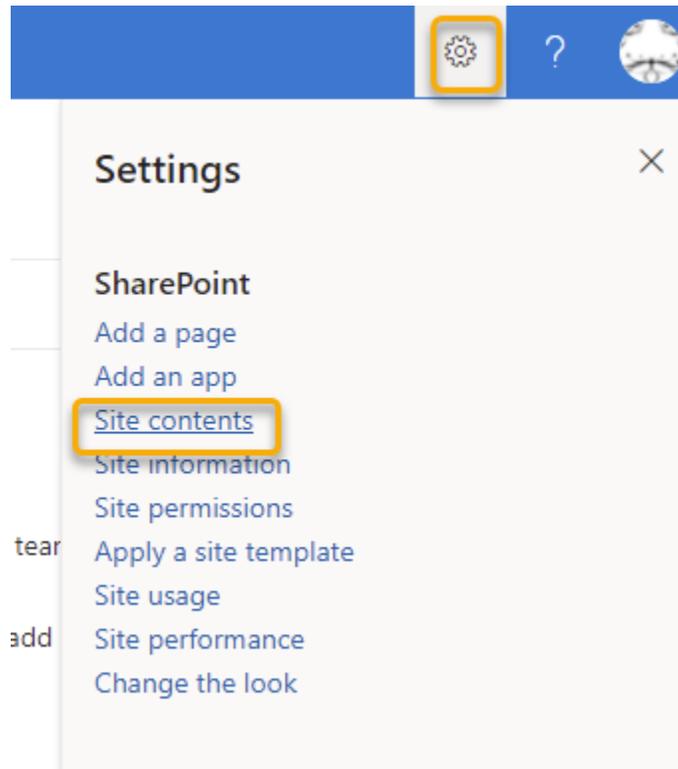
## 8.1. Site Column Gallery

### ❖ 8.1.1. Explore the Site Column Gallery

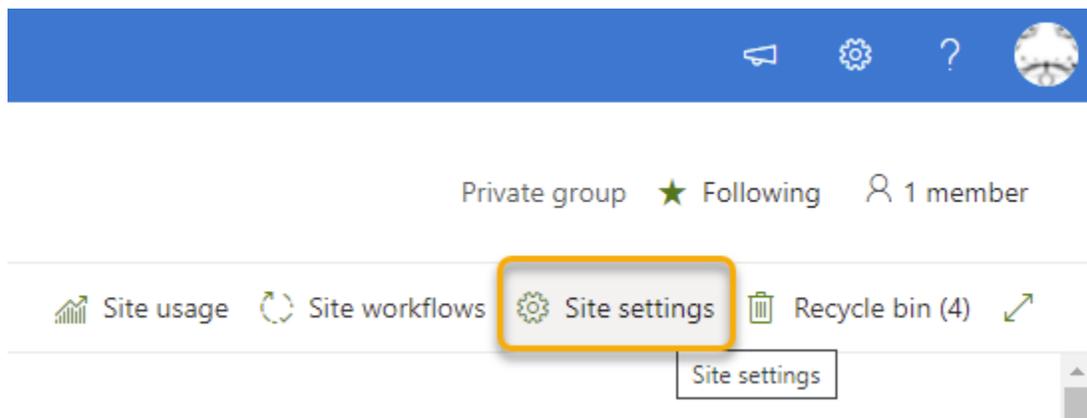
This walk-through will explore the columns available in the Site Column Gallery. Please note that based on your installation and security settings, you may not be able to try all of the features you see below.

1. Open a browser window if it is not already open and navigate to your **Class Sample** site.

2. Click the **Settings** menu and select the **Site Contents** option from the list.



3. Click **Site Settings**.



4. Click the **Site Columns** link in the **Web Designer Galleries** group on the **Site Settings** page.

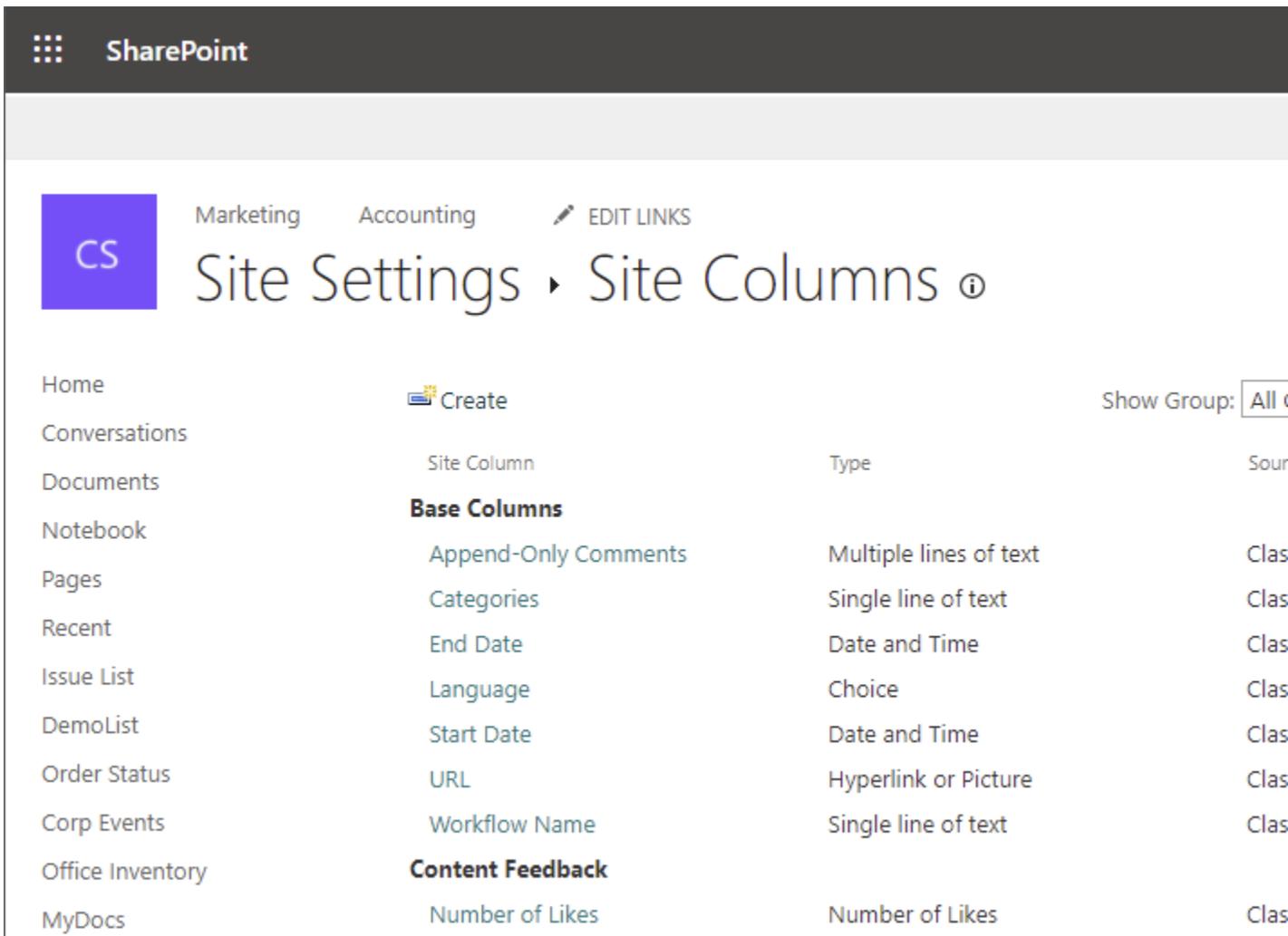
# Site Settings

ns

Look and Feel  
 Quick launch  
 Navigation Elements  
 Change the look

Web Designer Galleries  
Site columns  
 Site content types

- Take a few minutes to browse the list of **Site Columns** and their groupings. The image below is a partial list of **Site Columns**.



The screenshot shows the SharePoint interface for 'Site Settings' under the 'Site Columns' section. The breadcrumb path is 'Site Settings > Site Columns'. A navigation pane on the left lists various site features like Home, Conversations, Documents, etc. The main content area shows a table of site columns, categorized into 'Base Columns' and 'Content Feedback'. A 'Show Group:' dropdown is set to 'All'.

Site Column	Type	Source
<b>Base Columns</b>		
Append-Only Comments	Multiple lines of text	Class
Categories	Single line of text	Class
End Date	Date and Time	Class
Language	Choice	Class
Start Date	Date and Time	Class
URL	Hyperlink or Picture	Class
Workflow Name	Single line of text	Class
<b>Content Feedback</b>		
Number of Likes	Number of Likes	Class

6. Leave the **Site Columns** gallery open for the next walk-through.

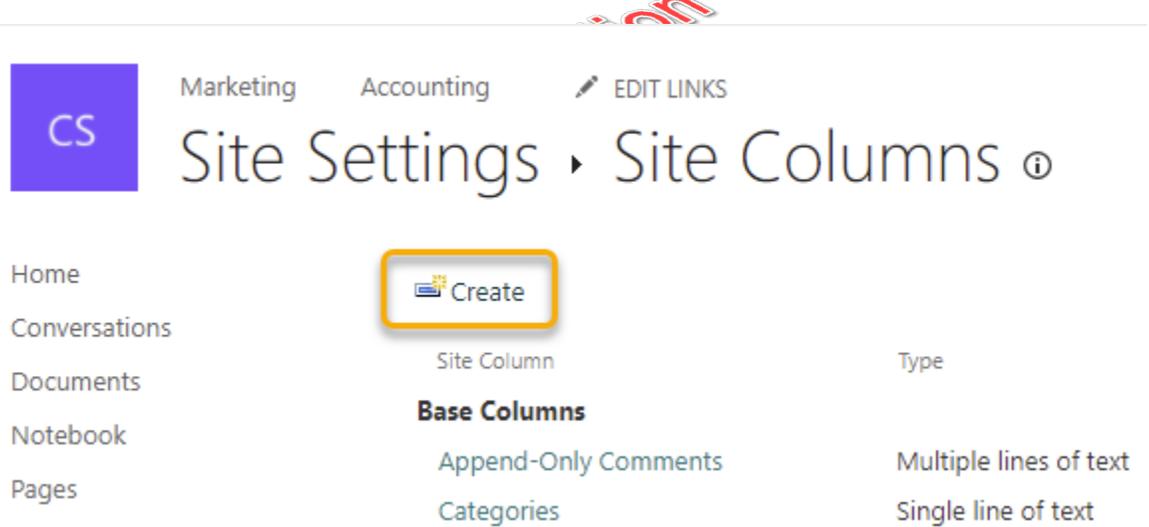


## 8.2. Creating Site Columns

### ❖ 8.2.1. Create a Custom Site Column

In this walk-through, you will learn how to create a custom **Site Column**. Follow the steps in the previous walk-through to navigate to the **Site Column** gallery.

1. Click the **Create** link at the top of the **Site Column** gallery.



2. Enter Favorite Colors in the **Column name** field and select **Choice (menu to choose from)** from the **The type of information in this column is:** option field.

# Site Columns ▸ Create Column

5

**Name and Type**

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

Column name:

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 (\$, ¥, €)

## Column Type Choices

Note that the column type choices are the same as for creating list or library columns. The main difference with Site Columns is that they can be reused on multiple lists and libraries throughout the site.

3. Note in the **Group** region you are leaving the default setting set to **Existing Group** and **Custom Columns**

**Group**

Specify a site column group.  
Categorizing columns into groups will make it easier for users to find them.

Put this site column into:

Existing group:

New group:

4. Scroll down the **Site Column** page and enter some color values in the list box field labeled **Type each choice on a separate line**. Use the following image as a guide for what to enter. Note that you may remove **Red** from the Default area.

### 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

Default value:

Choice  Calculated Value

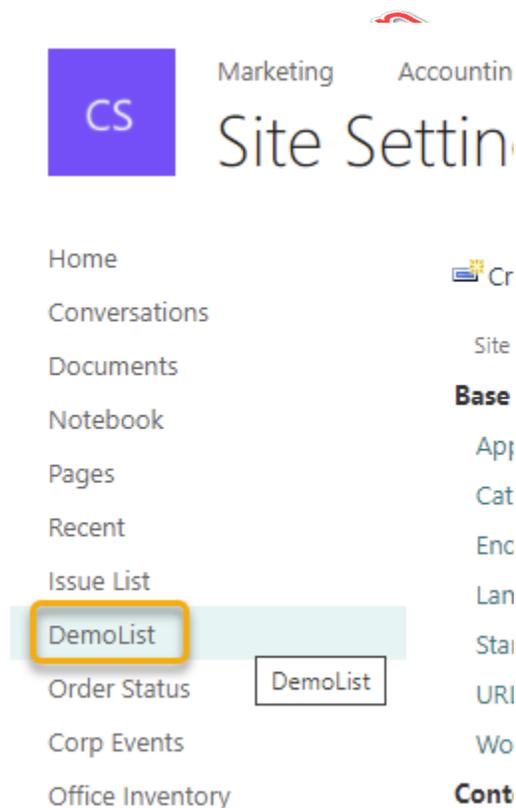
5. Click the **OK** button at the bottom of the form to save your work.
6. If you scroll down the list of **Site Columns**, you will find the new column **Favorite Colors** under the **Custom Columns** group.

Total Work	Number	Class Sample
<b>Custom Columns</b>		
Favorite Colors	Choice	Class Sample
Task Outcome	Outcome choice	Class Sample
WSEnabled	Yes/No	Class Sample
<b>Display Template Columns</b>		
Compatible Managed Properties	Multiple lines of text	Class Sample
Compatible Search Data Types	Choice	Class Sample

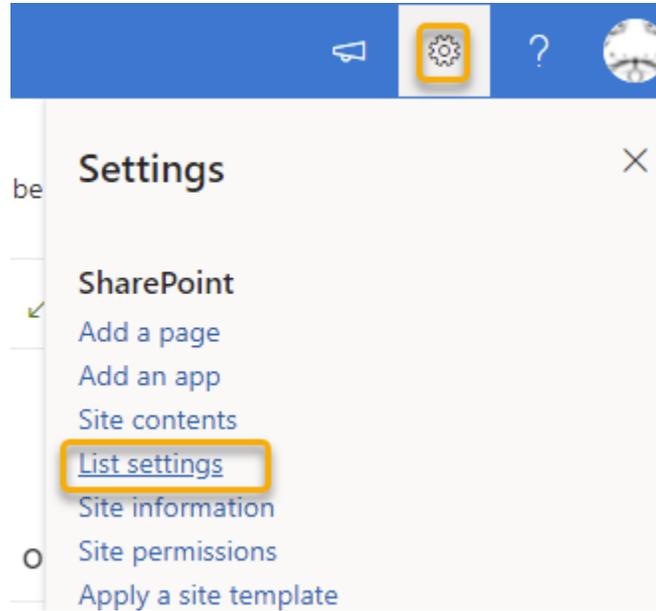
## ❖ 8.2.2. Add a Site Column to a List

In this walk-through, you will learn how to add a Site Column to a SharePoint list. This walk-through will use the **Demo List** that was created in an earlier walk-through but any list or library would work.

1. Click the **Demo List** link on the **Site Contents**.



2. Click the **Settings** to open **List Settings** button.



3. Scroll down the **List Settings** page and to the **Columns** region.

Careful Deleting

4. Click the **Add from existing site columns** link under the list of columns.

## Columns

A column stores information about each item in the list. The following columns are currently a

Column (click to edit)	Type
Title	Single line of text
Modified	Date and Time
Created	Date and Time
Item Description	Single line of text
Item Type	Choice
Order Date	Date and Time
Ordered By	Person or Group
Order Status	Lookup
test	Single line of text
Created By	Person or Group
Modified By	Person or Group

- 
- Create column
  - [Add from existing site columns](#)
  - Column ordering
  - Indexed columns

5. In the **Add Columns from Site Columns** page, change the **Select site columns from** drop-down field to **Custom Columns**, and click the **Add** button to move the **Favorite Colors** column to the **Columns to add** list.

# Settings ▸ Add Columns from Site Columns ⓘ

Select Columns  
Select which site columns to add to this list.

Select site columns from:  
Custom Columns

Available site columns:  
Favorite Colors  
Task Outcome  
WSEnabled

Columns to add

Add >

< Remove

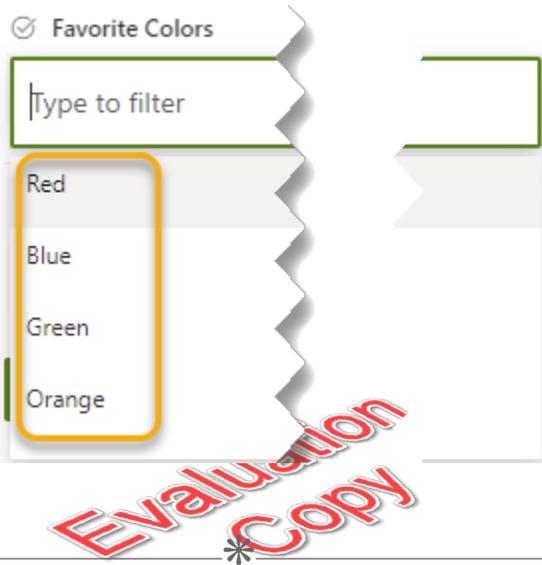
Description:  
None

Group: Custom Columns

Add to default view

Options

6. Click the **OK** button to save our change back to the list's columns.
7. Navigate back the items view of the **Demo List** by clicking the link in the **Quick Launch** menu or in the **breadcrumbs**.
8. Click the **new** button in the list to create a new item and test the Site Column.
9. Verify in the **Demo List - New Item** form that the **Favorite Colors** drop-down list has the colors that you defined in the Site Column. Click the **Cancel** button to close the form without saving.

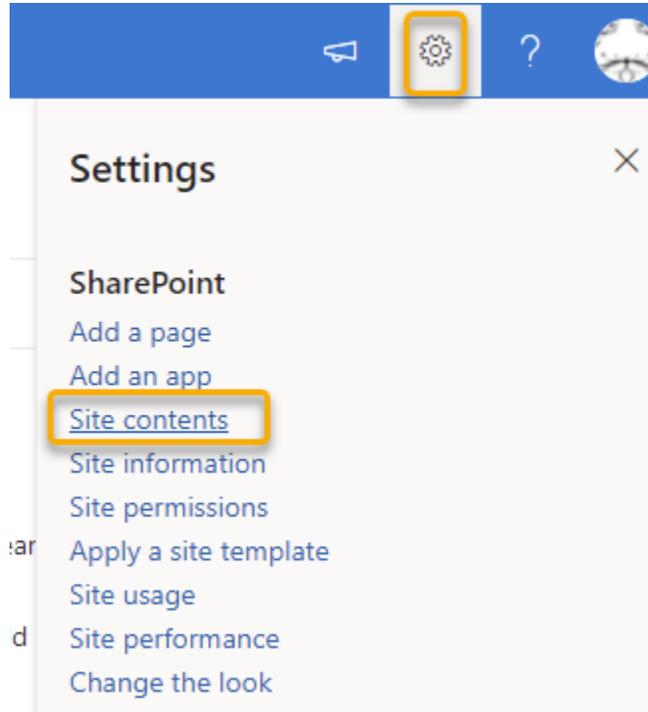


## 8.3. Site Content Type Gallery

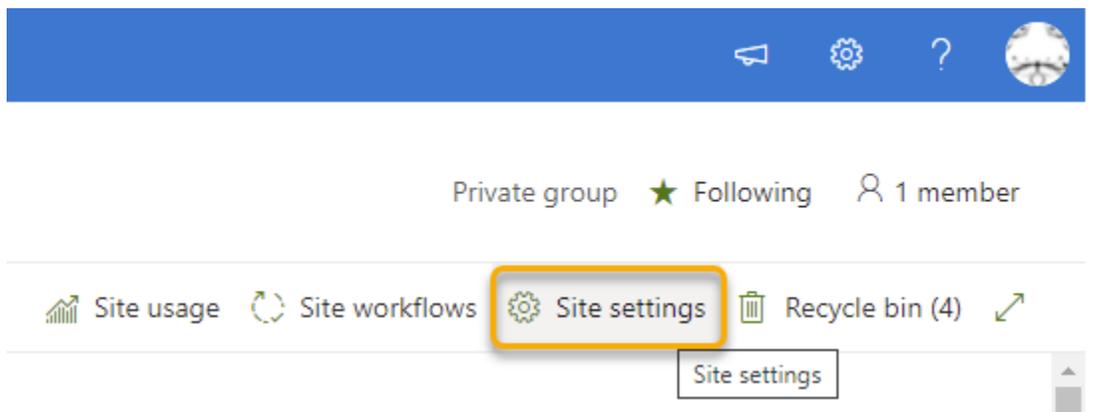
### ❖ 8.3.1. Explore the Site Content Types Gallery

This walk-through will explore the content types available in the Site Content Types Gallery.

1. Open our browser if it is not already open and navigate to your Class Sample team site.
2. Click the **Settings** menu and select the **Site Contents** option from the list.



3. Click the **Site Settings** link.

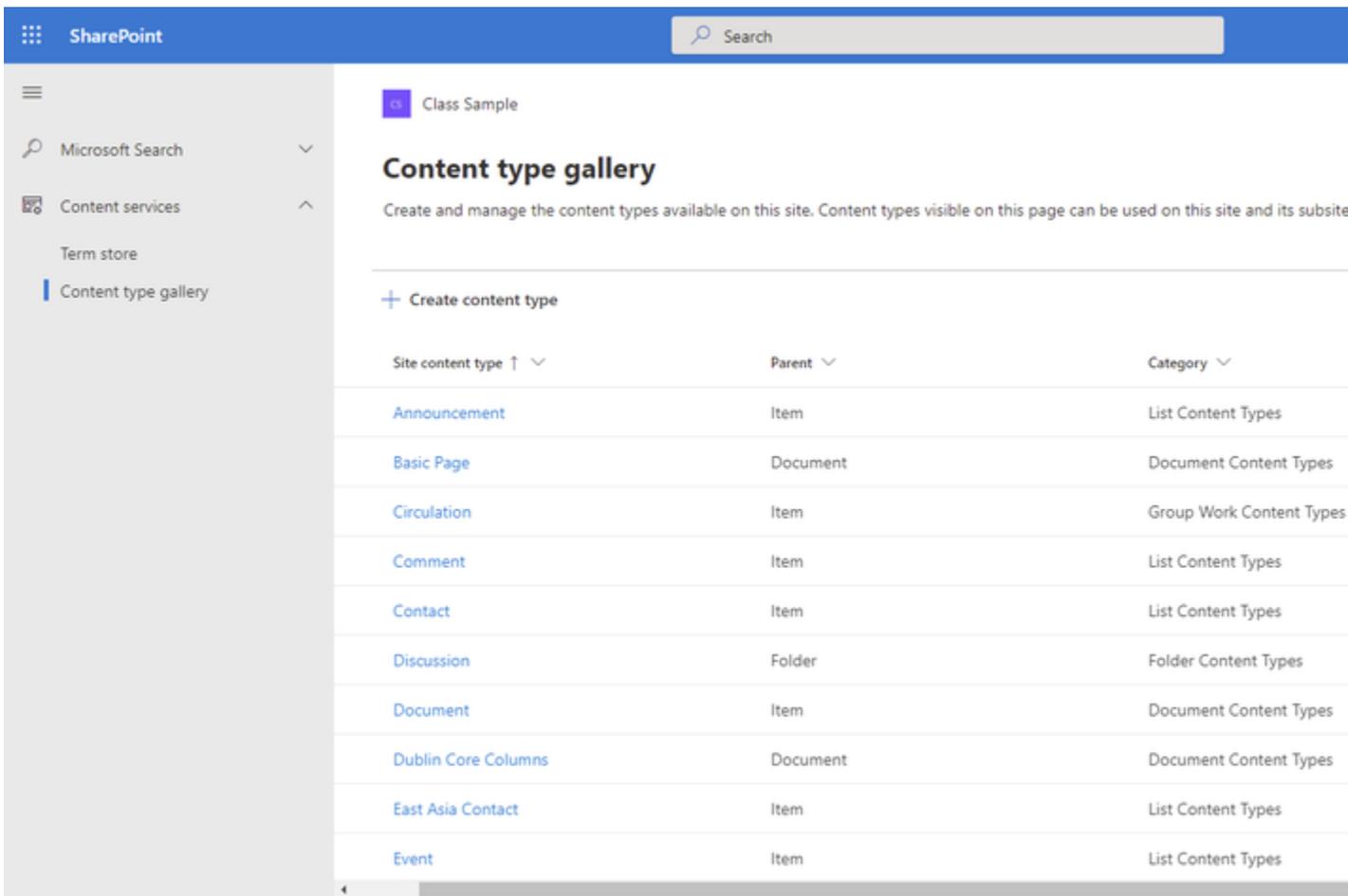


4. Click the **Site content types** link in the **Web Designer Galleries** group on the **Site Settings** page.

# Site Settings



5. Take a few minutes to browse the list of **Site Content Types** and their groupings. The image below is a partial list of **Site Content Types**.



6. Leave the **Site Content Types** gallery open for the next walk-through.

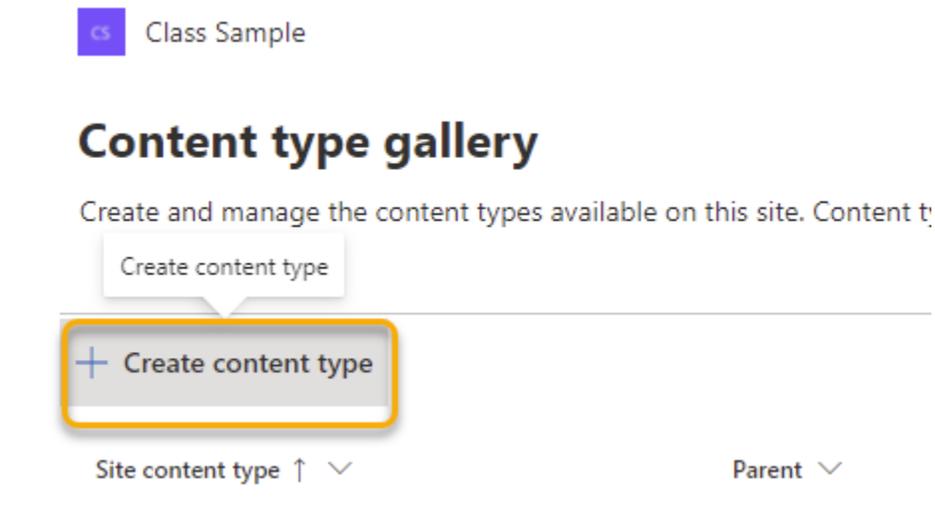


## 8.4. Creating Content Types

### ❖ 8.4.1. How to Create and Use Content Types

In this walk-through, you will learn to create a custom content type and apply it to a new document library.

1. Follow the previous demonstration to navigate to the Site content types gallery.
2. Create a new content type in the **Sample Class Site** that extends the **Document** content type.
  - A. From within the **Site Content Types** gallery page, click the **Create** link at the top left of the page.



- B. In the **New Site Content** form, use the following information to complete the form.

Field	Data
Name:	Type "Work Order"
Description:	Type "Contoso custom content type for work orders"
Select parent content type from:	Select <b>Document Content Types</b>
Parent Content Type:	Select <b>Document</b>

The completed form should look similar to the following image.

Settings ? Profile

Close

### Create content type

**Name \***  
Work Order

**Description**  
Contoso custom content type for work orders.

**Category**  
 Use an existing category  Create a new category  
Name:  
Custom Content Types

**Parent content type**  
Choose the content type that you want to base this content type on.

Parent category:  
Document Content Types

Content type:  
Document

**Create** Cancel

- C. Click the **OK** button to complete the new content type creation process.
3. Add columns to the new **Work Order** content type.
    - A. Click the **Add site columns** below the **Site Columns** region. Choose **Add from existing site columns**.

## Site columns

Add and manage the site columns that are a part of this content t

+ Add site column 

Create new site column

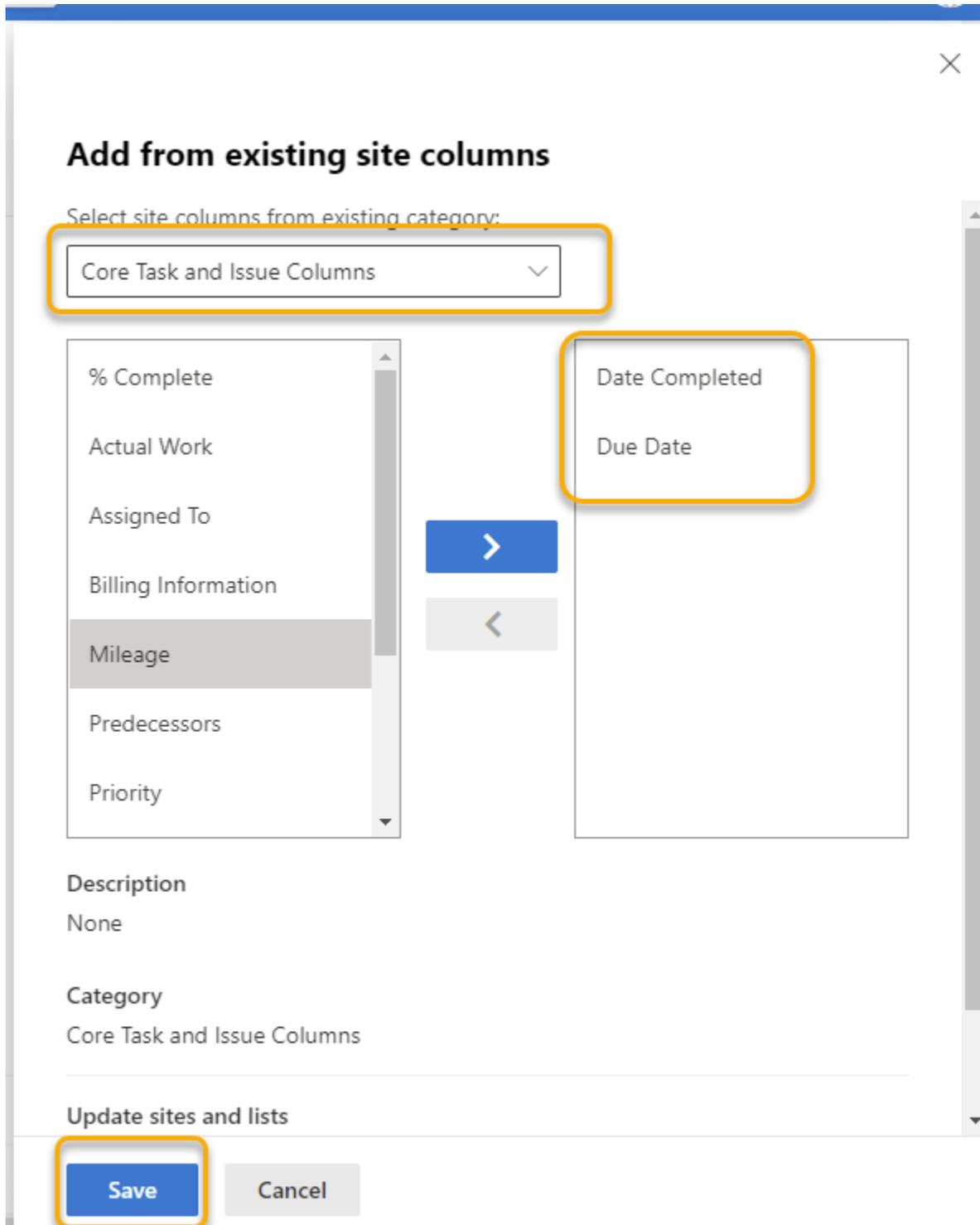
Add from existing site columns

Typ

Name

File

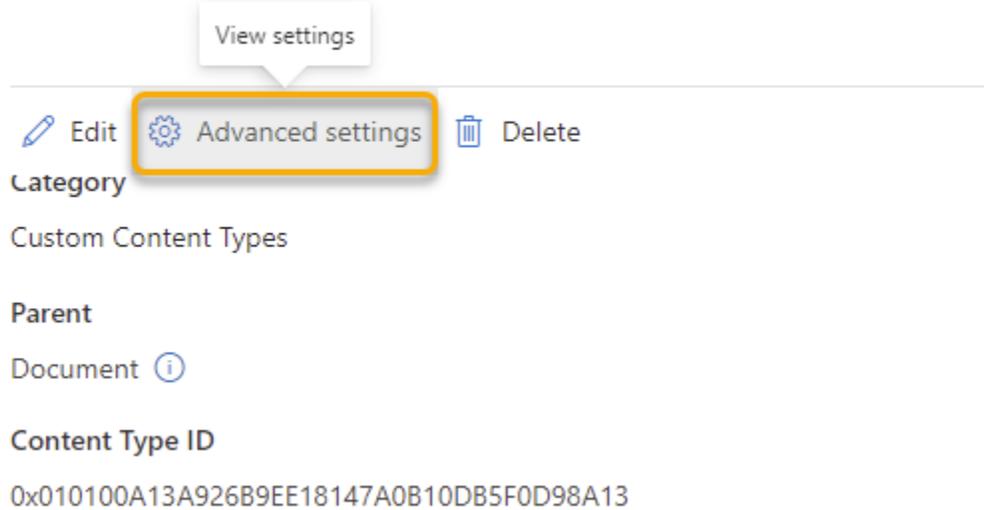
- B. In the **Add Columns to Content Type** form, select **Core Task and Issue Columns** in the **Select columns from** drop-down box. From the **Available columns** list box, choose both **Due Date** and **Date Completed**, and then click the **Add** button to add them to the **Columns to add** list box.



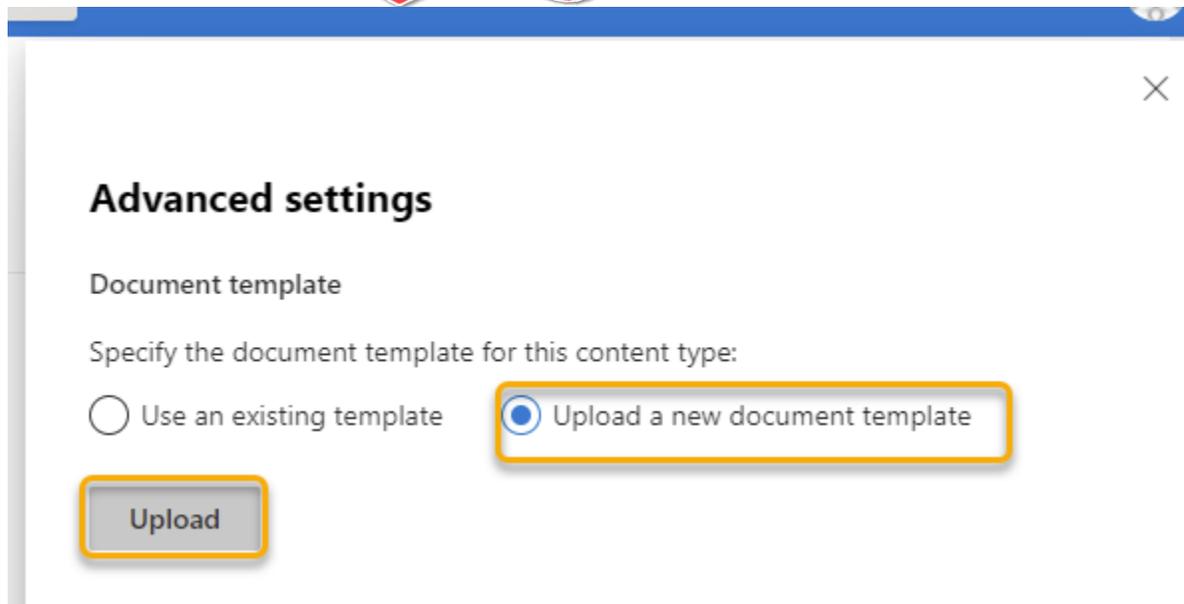
- C. Click the **Save** button to complete adding the site columns to the **Work Order** content type.

4. Assign a document template to the new **Work Order** content type.
  - A. Click the **Advanced settings** link.

## Content type gallery > Work Order



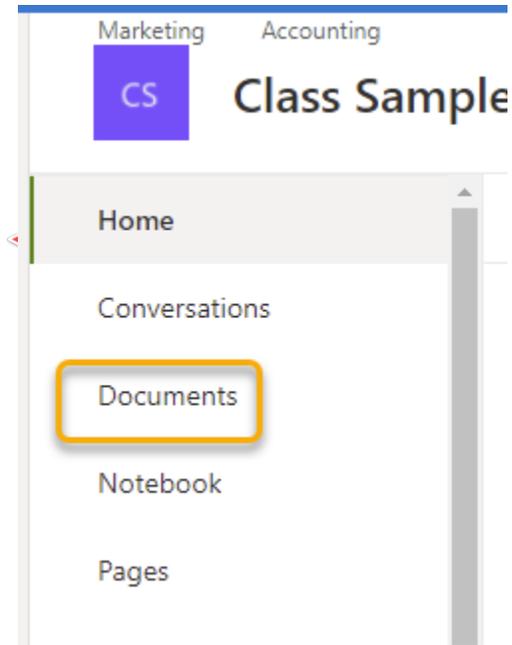
- B. Click the **Upload a new document template** option on the **Advanced Settings** page and then click the **Choose File** button to find the file.



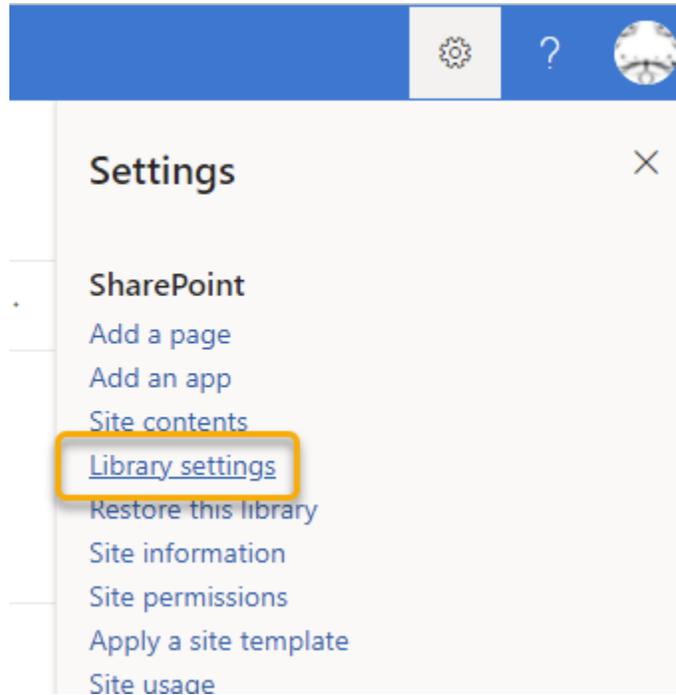
- C. Navigate to the folder you downloaded the class files to and select the Work\_Order.docx file. You may also choose a file of yours to use. Click the **Open** button

to complete the file selection. NOTE: If you do not have security permissions you may skip this step, again Please note that based on your installation and security settings, you may not be able to try all of the features you see in this guide.

- D. Click the **OK** button on the **Advanced Settings** page to save your changes to the **Work Order** content type.
5. Add the **Work Order** content type to the **Documents** document library.
- A. Click the new **Documents** document library.

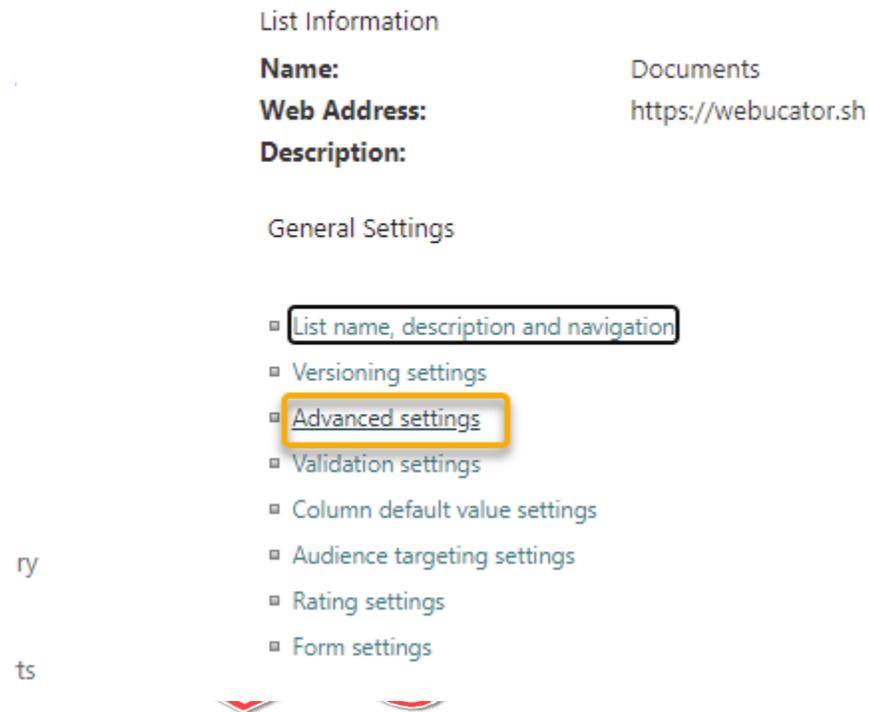


- B. Click the **Library Settings** on the **Settings**.



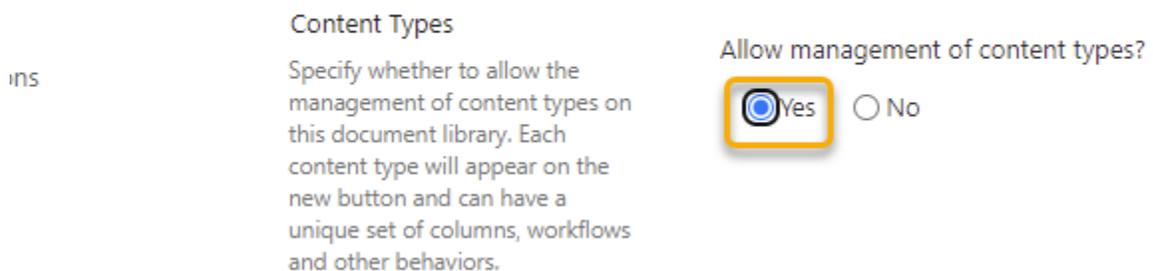
- C. Click the **Advanced Settings** link on the **Document Library Settings** page in the **General Settings** region.

# Documents ▸ Settings



- D. Click the **Yes** option under the label **Allow management of content types?** and then click the **OK** button at the bottom of the page to save the change.

# Settings ▸ Advanced Settings



- E. You should now see a **Content Types** region that was not being displayed before you made the change in the previous step.

### Content Types

This document library is configured to allow multiple content types. Use content types to specify this library:

Content Type	Visible on New Button
Document	✓

- F. Click the **Add from existing site content types** link at the bottom of the **Content Types** region.

### Content Types

This document library is configured to allow multiple content types. Use content types to specify the this library:

Content Type	Visible on New Button
Document	✓
sample	✓

[Add from existing site content types](#)

Change new button order and default content type

### Columns

A column stores information about each document in the document library. Because this document content type of the document. The following columns are currently available in this document library:

Column (click to edit)	Type
------------------------	------

- G. In the **Add Content Types** form, select **Custom Content Type** in the drop-down box labeled **Select site content types from**. Select **Work Orders** in the list box labeled **Available Site Content Types** and click the **Add** button to move it to the list box labeled **Content types to add**. Click the **OK** button to save your changes.

# Settings ▸ Add Content Types ⓘ

## Select Content Types

Select from the list of available site content types to add them to this list.

Select site content types from:

Custom Content Types

Available Site Content Types:

Work Order

Description:

Contoso custom content type for

Group: Custom Content Types

ry

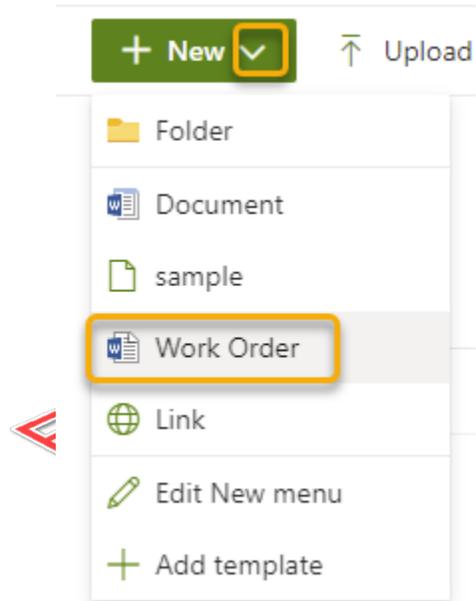


6. Add a new document to the **Document** library based on the **Work Order** content type.
  - A. Click the **Document** link in either the **Quick Launch** menu or the Site's **Breadcrumbs** to take you to the **Browse** view of the **Documents** library.

The screenshot shows a SharePoint site with a purple header bar. On the left is a navigation menu with a "CS" logo and links for Home, Conversations, Documents, and Notebook. In the center, there are breadcrumb links for "Marketing" and "Accounting", followed by "Documents" which is highlighted with an orange box. To the right of "Documents" is a dropdown menu with "Documents" selected. Further right is a "Settings" link. On the far right, there is an "EDIT LINKS" button. Below the breadcrumb trail, there is a metadata table:

Home	List Information	
Conversations	<b>Name:</b>	Documents
Documents	<b>Web Address:</b>	https://webuc:
Notebook	<b>Description:</b>	

- B. Click the **New** to open the list and choose the **Work Orders** option.



- C. **Microsoft Word Online** will open a new document based on the template we loaded into the **Work Orders** content type. NOTE: If you were unable to upload a template due to permissions, your page will be blank.

Word Document - Saved Search (Alt + Q)

File Home Insert Layout References Review View Help Editing

WORK ORDER  
Details

NAME: \_\_\_\_\_

TASK	DUE DATE	DONE	IN
	[Date]	<input type="checkbox"/>	

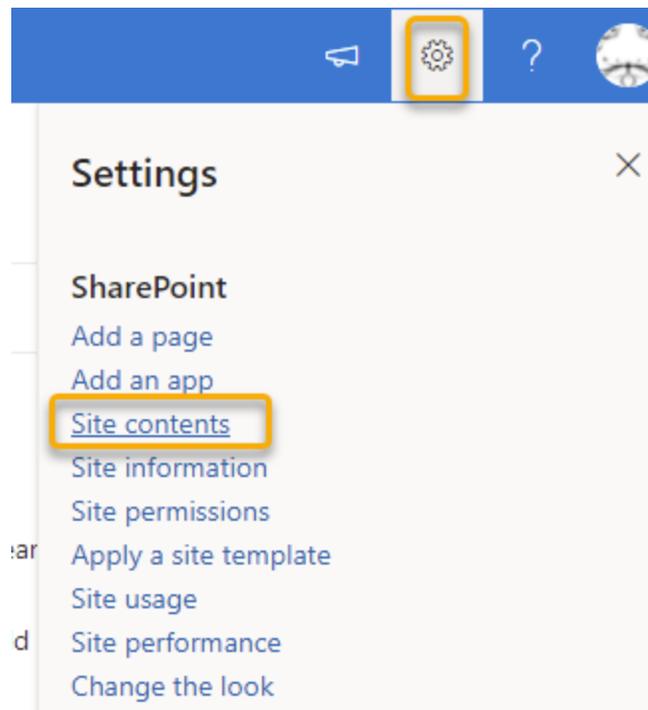
29 words English (U.S.) Text Predictions: On 100% Fit

# Exercise 9: Creating and Working with Content Types

 10 to 15 minutes

In this exercise, you will learn to create Content Types and Site Columns. Additionally you will learn how to associate a document template with a content type based on the **Document** parent content type.

1. Create a new Content Type for the Sample Class Site.
  - A. Open your browser if it is not already open and navigate to your root team site.
  - B. Click the **Settings** menu and select the **Site Contents** link.



- C. Click **Site Settings**.



Private group ★ Following 1 member

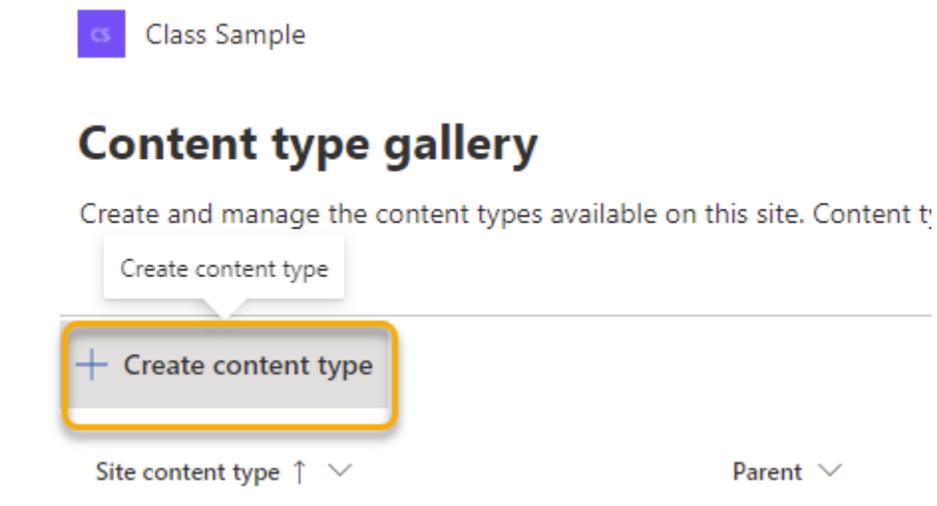


D. Click the **Site content types** link within the **Web Designer Galleries** group.

## Site Settings



- E. Take a moment to read through the list of default content types. Note how they are grouped and there is a parent column that lists the parent content type of each individual content type.
- F. Click the **Create** link at the top of the list of content types.



G. In the **New Site Content** form, use the following information to complete the form.

<b>Field</b>	<b>Data</b>
Name:	Type "Employee Reviews"
Description:	Type "custom content type for employee reviews"
Select parent content type from:	Select <b>Document Content Types</b>
Parent Content Type:	Select <b>Document</b>
Choose group:	Type "Custom Content Types"

The completed form should look similar to the following image. Click the **OK** button to complete the new content type creation process.

×

### Create content type

**Name \***

**Description**

**Category**

Use an existing category     Create a new category

Name:

**Parent content type**

Choose the content type that you want to base this content type on.

Parent category:

Content type:

**Create**    Cancel

2. Add columns to the new **Employee Reviews** content type.

- A. Click the **Add from existing site columns** link below the **Columns** region on the **Site Content Type Information** page.

## Site columns

Add and manage the site columns that are a part of this content type.

+ Add site column 

Create new site column

Add from existing site columns

Name	Type
	File

- B. In the **Add Columns to Content Type** form, select **Core Contact and Calendar Columns** in the **Select columns from** drop-down box. From the **Available columns** list box, choose both **Full Name** and **Job Title** then click the **Add** button to add them to the **Columns to add** list box. Click the **Save** button to complete adding the site columns to the **Employee Reviews** content type.

×

### Add from existing site columns

Select site columns from existing category:

Core Contact and Calendar Columns

Location

Manager's Name

Middle Name

Mobile Number

Nickname

Office

Organizational ID Number

>

<

Full Name

Job Title

**Description**  
None

**Category**  
Core Contact and Calendar Columns

---

**Update sites and lists**

**Save**   **Cancel**

3. Assign a document template to the new **Employee Reviews** content type.

- A. Click the **Advanced settings** link under the **Settings** region on the **Employee Reviews** content type information page.

## Content type gallery > Employee Reviews

View settings

Edit Advanced settings Delete

### Employee Reviews

custom content type for employee reviews

Category

Custom Content Types

- B. Click the **Upload a new document template** option on the **Advanced Settings** page and then click the **Choose File** button to find the file.

### Advanced settings

Document template

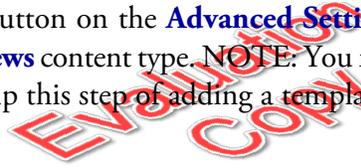
Specify the document template for this content type:

Use an existing template  Upload a new document template

Upload

- C. Navigate to the folder you downloaded the class files to and select the **Emp\_Re view.docx** file. You may also choose a file on your computer instead. Click the **Open** button to complete the file selection.

- D. Click the **OK** button on the **Advanced Settings** page to save your changes to the **Employee Reviews** content type. **NOTE:** You may receive an error due to permissions and you may skip this step of adding a template.

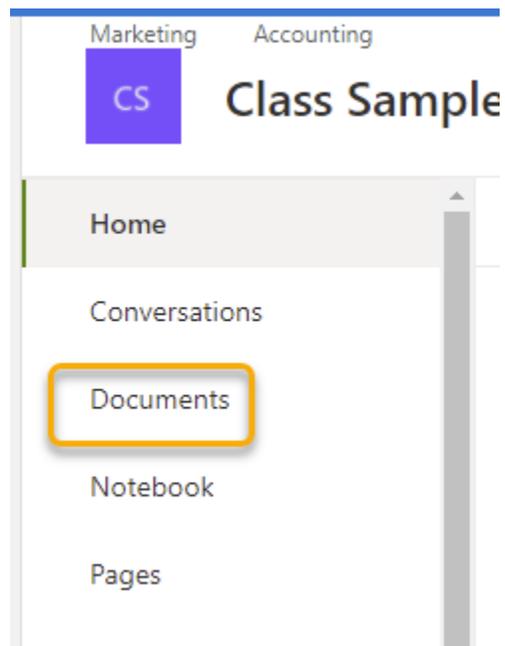


# Exercise 10: Adding a Content Type to a Library

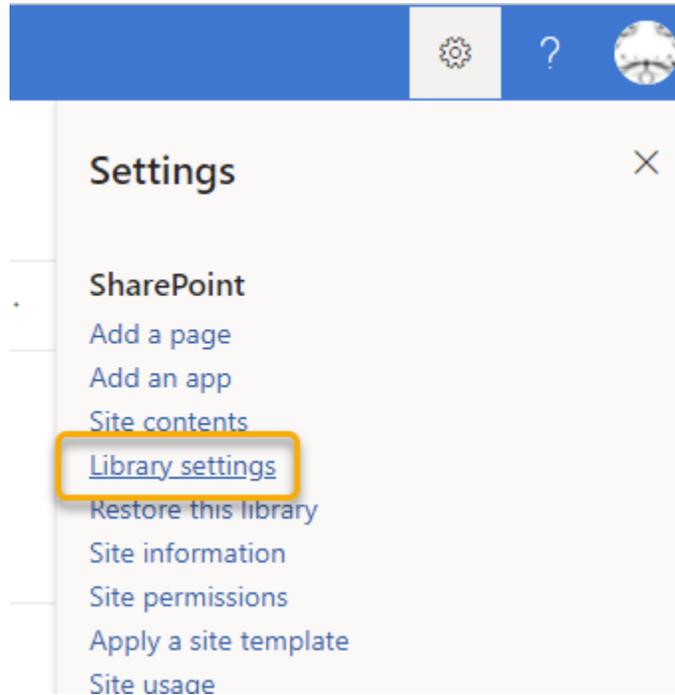
 10 to 15 minutes

In this exercise, you will learn to associate the custom content type you built in the previous exercise with the Document Library.

1. Click the new **Documents** document library.

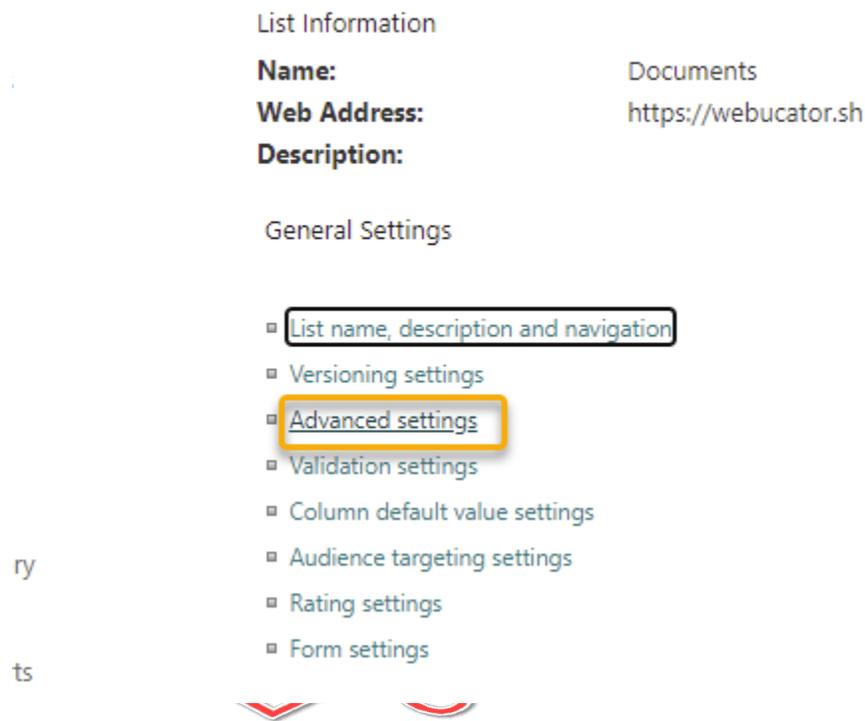


2. Click the **Library Settings** on the **Settings** .



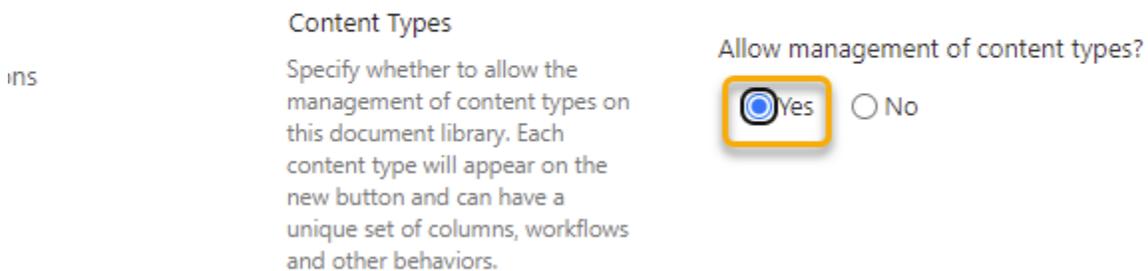
3. Click the **Advanced Settings** link on the **Document Library Settings** page in the **General Settings** region. NOTE: This step may not be needed if you had previously performed this task. Skip to step 6.

# Documents ▸ Settings



4. Click the **Yes** option under the label **Allow management of content types?** and then click the **OK** button at the bottom of the page to save the change.

# Settings ▸ Advanced Settings



5. You should now see a **Content Types** region that was not being displayed before you made the change in the previous step.

### Content Types

This document library is configured to allow multiple content types. Use content types to specify this library:

Content Type	Visible on New Button
Document	✓

6. Click the **Add from existing site content types** link at the bottom of the **Content Types** region.

### Content Types

This document library is configured to allow multiple content types. Use content types to specify the this library:

Content Type	Visible on New Button
Document	✓
sample	✓

[Add from existing site content types](#)

Change new button order and default content type

### Columns

A column stores information about each document in the document library. Because this document content type of the document. The following columns are currently available in this document library:

Column (click to edit)	Type
------------------------	------

7. In the **Add Content Types** form, select **Custom Content Type** in the drop-down box labeled **Select site content types from**. Select **Employee Review** in the list box labeled **Available Site Content Types** and click the **Add** button to move it to the list box labeled **Content types to add**. Click the **OK** button to save your changes.

## Select Content Types

Select from the list of available site content types to add them to this list.

Select site content types from:  
Custom Content Types

Available Site Content Types:  
Employee Reviews

Add >

< Remove

Description:  
custom content type for employee reviews

Group: Custom Content Types

8. Add a new document to the **Document** library based on the **Employee Review** content type.
  - A. Click the **Document** link in either the **Quick Launch** menu or the Site's **Breadcrumbs** to take you to the **Browse** view of the **Documents** library.

CS Marketing Accounting EDIT LINKS

Documents Settings

Documents

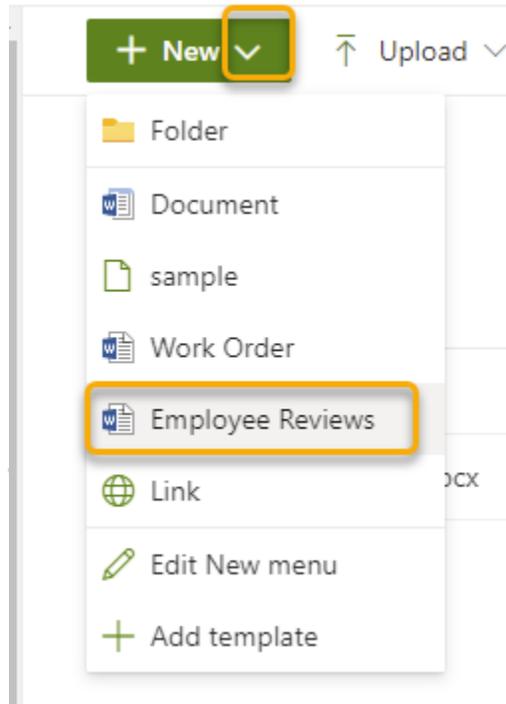
Home List Information

Conversations **Name:** Documents

Documents **Web Address:** https://webuc:

Notehook **Description:**

- B. Click the **New** to open the list and choose the **Work Orders** option.



- C. **Microsoft Word Online** will open a new document based on the template we loaded into the **Employee Reviews** content type. NOTE: If you were unable to upload a template due to permissions, your page will be blank.

Word Document1 - Saved Search (Alt + Q)

File Home Insert Layout References Review View Help Editing

Undo Copy Paste Bold Italic Underline Bullets Numbered List Text Color Highlight Color Spelling Grammar

## CLASS SAMPLE

### Job Performance Review Guide

#### EMPLOYEE

Employee Name		Review Period	
Department		Manager	

#### PERFORMANCE GOALS AND OBJECTIVES

Zero to 2 months	2 to 4 months	4-6 months
<ul style="list-style-type: none"> <li>Become familiar with your department's business goals.</li> <li>Work with your manager to define and document your goals. Include what you are expected to produce by your first review, activities needed to accomplish results, and success criteria.</li> </ul>	<ul style="list-style-type: none"> <li>Make certain defined goals and criteria are realistic. Renegotiate if necessary.</li> <li>Are you focusing your time on the goals you committed to? If not, either work with your manager to change your goals or reevaluate how you spend your time.</li> </ul>	<ul style="list-style-type: none"> <li>Review performance goals to ensure they are on target. Reprioritize work accordingly.</li> </ul>

NOTES/ACTIONS

#### SKILLS AND KNOWLEDGE DEVELOPMENT

Zero to 2 months	2 to 4 months	4-6 months
<ul style="list-style-type: none"> <li>Understand the specific skills and knowledge you need. Use the job profile as your guide.</li> <li>Build a skill development plan based on the goals agreed to by you and your manager.</li> </ul>	<ul style="list-style-type: none"> <li>Attend one of the sessions in the Administrator certification program. See the training resource site for courses.</li> <li>Review your development plan and suggested curriculum for additional skills and training.</li> </ul>	<ul style="list-style-type: none"> <li>Attend at least one more session in the Administrator certification program.</li> <li>Create a timeline with associated tasks that you will follow in order to complete the skills outlined in your personal development plan.</li> </ul>

387 words English (U.S.) Text Predictions: On 100% Fit

# Conclusion

In this lesson, you have learned:

- About Site Columns.
- About Content Types.
- How to create Site Columns.
- How to create Content Types.
- How to create a document template for a Content Type.
- How to assign a Content Type to a list or library.
- How to create new items based on a custom Content Type.

Evaluation  
Copy



# LESSON 9

## Managing SharePoint Site Permissions

---

### Topics Covered

- SharePoint groups.
- Assigning permissions.
- Site-level permission inheritance.
- List- and library-level permission inheritance.

### Introduction

Permissions on a SharePoint site are assigned when a site is created. The default is that permissions assigned to the root of a site collection are inherited by child sites. At any time, permissions inheritance can be turned off at a site, list, library, or even at the item level in a list or library. The permissions themselves can be assigned to either SharePoint groups, individual users, or groups created outside of SharePoint such as Windows groups.

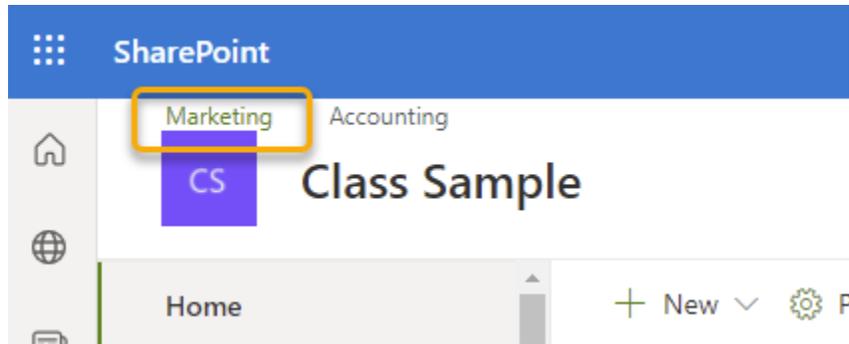


## 9.1. SharePoint Groups

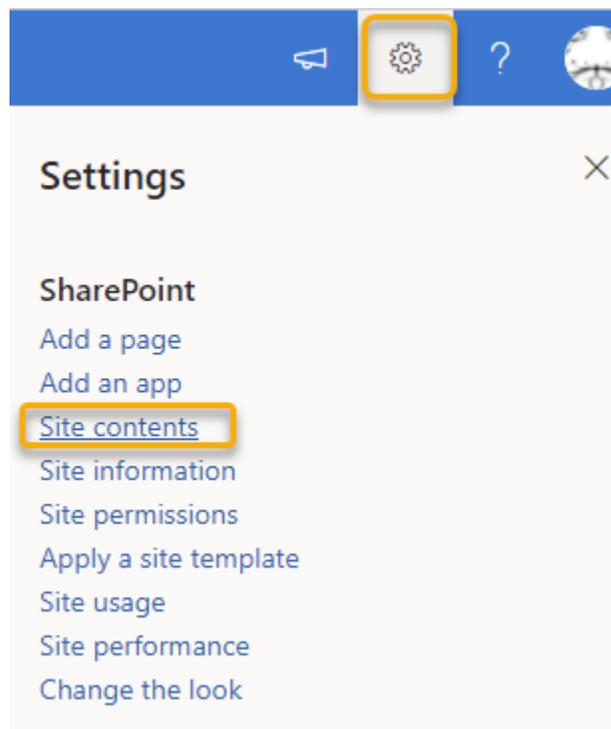
### ❖ 9.1.1. View the Default SharePoint Groups

SharePoint creates default groups based on the template used to create the root site in the site collection. In the following walk-through you will view the default groups in the **Marketing Site**. Later in this lesson, you will explore how sites inherit these groups by default and how to change that.

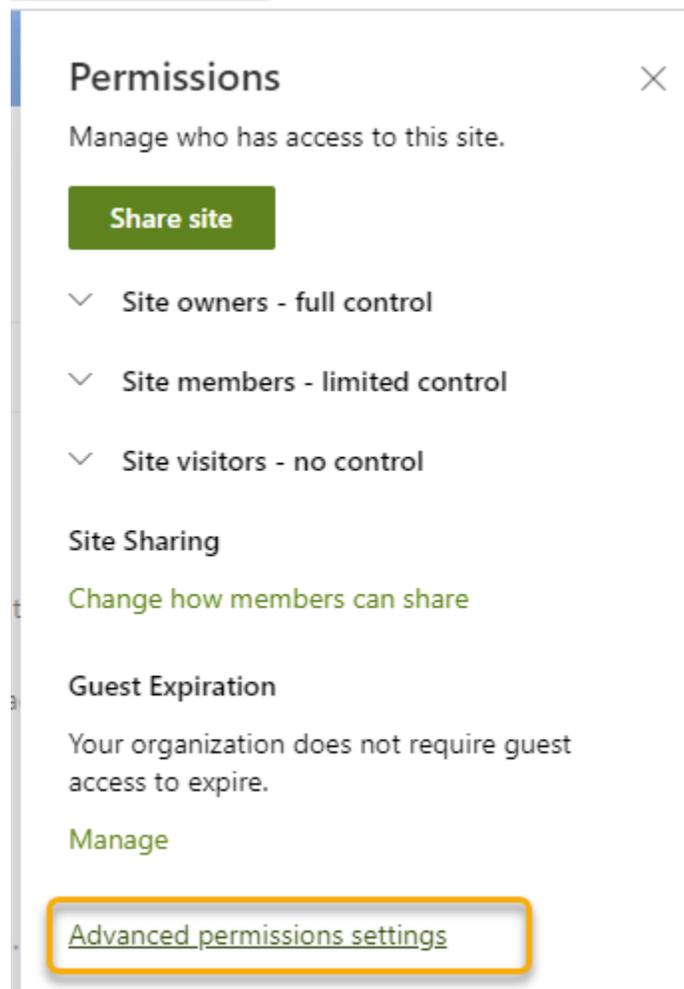
1. Make sure your browser is open to the **Marketing** site.



2. Click the **Settings** menu link and then select the **Site permissions** link from the available options.



3. Click the **Advanced permissions settings** link.



4. Verify the default groups in the list are **Members**, **Owners**, and **Visitors**. Note that the **Members**, **Owners**, and **Visitors** groups have the site's name **Class Sample Site** appended to them.

SharePoint

BROWSE PERMISSIONS SHARE

Manage Parent Stop Inheriting Permissions Grant Permissions Create Group Check Permissions

Inheritance Grant Check

Home Notebook Documents Pages Site contents Recycle Bin EDIT LINKS

**!** This Web site inherits permissions from its parent. (Class Sample)

Name	Type	Permission Levels
<input type="checkbox"/> Class Sample Members	SharePoint Group	Edit
<input type="checkbox"/> Class Sample Owners	SharePoint Group	Full Control
<input type="checkbox"/> Class Sample Visitors	SharePoint Group	Read

5. Click the **Class Sample Members** link to view the list of members.



Marketing Accounting

## People and Groups ▸ Class Sample Mem

Groups

Class Sample  
MembersClass Sample  
VisitorsClass Sample  
Owners

More...

New ▾

Actions ▾

Settings ▾

 Name

About Me

Job Title

 Class Sample Members

6. Click the **Class Sample Visitors** link in the **Quick Launch** menu to view its members and verify that it is currently empty.



Marketing Accounting

# People and Groups ▸ Class Sample Visito

Groups

Class Sample Members

Class Sample Visitors

Class Sample Owners

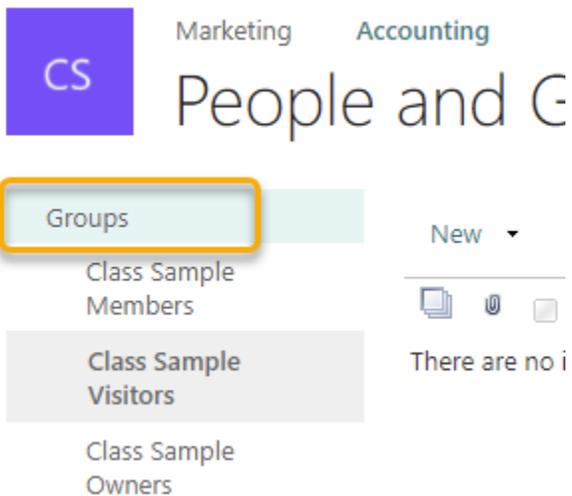
More...

New ▾ Actions ▾ Settings ▾

Name	About Me	Job Title
There are no items to show in this view of the "User Information List" list.		



7. Create a new SharePoint group. Click Groups on Quick Launch to see all groups.



A. Click the **Create Group** link button from the **PERMISSIONS** toolbar.



# Marketing > People and Groups ⓘ

Groups

- Class Sample Members
- Class Sample Visitors
- Class Sample Owners

New ⌵ Settings ⌵

New Group  
Create a new SharePoint group.

All Users (windows) ✎ New Group

Class Sample Members ✎ Use this group to grant people contribute permissions to the SharePoint site: Class Sample

B. Enter Designers in the **Name** field of the **Create Group** form.



# People and Groups ▸ Create Group ⓘ

- Home
- Notebook
- Documents
- Pages
- Site contents
- Recycle Bin
- EDIT LINKS

## Name and About Me Description

Type a name and description for the group.

Name:

Designers

About me:

[Click for help about adding HTML form](#)

## Owner

The owner can change anything about the group such as adding and removing members or deleting the group. Only one user or group can be the owner.

Group owner:

[User Avatar] X

## Group Settings

Specify who has permission to see the list of group members and who has permission to add and remove members from the group.

Who can view the membership of the group

Group Members

Who can edit the membership of the group

Group Owner

C. Leave the owner user set to your account.

## Only One Owner

Note that we can only have one entry for the **Owner**, but we can switch the user for a group.

- D. Leave the default options set in the **Group Settings** region. Leave the default options set in the **Membership Requests** region and click the **Create** button to complete the process.

### Group Settings

Specify who has permission to see the list of group members and who has permission to add and remove members from the group.

Who can view the membership of the group?

Group Members  Everyone

Who can edit the membership of the group?

Group Owner  Group Members

### Membership Requests

Specify whether to allow users to request membership in this group and allow users to request to leave the group. All requests will be sent to the e-mail address specified. If auto-accept is enabled, users will automatically be added or removed when they make a request.

Allow requests to join/leave this group?

Yes  No

Auto-accept requests?

Yes  No

Send membership requests to the following e-mail address:

tberry@Webucator.onmicrosoft.com

**Caution:** If you select yes for the Auto-accept requests option, any user requesting access to this group will automatically be added as a member of the group and receive the permission levels associated with the group.

Create



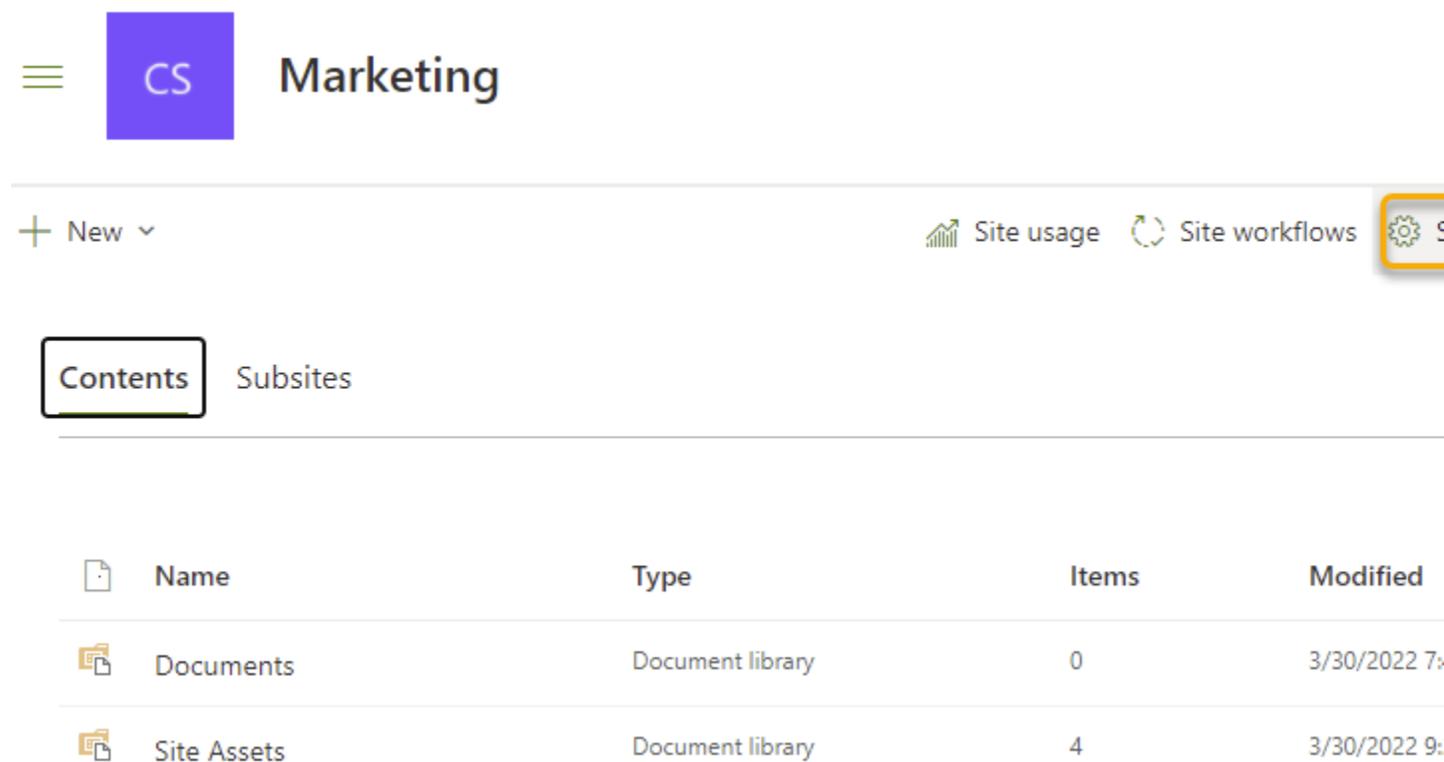
## 9.2. Assigning Permissions

Assigning permissions to SharePoint resources can be done several different ways. One method is to assign a user or group account, typically Windows users or groups, directly to a permission level or add them to a SharePoint group. The recommended method is to grant permissions by adding user or group account into the SharePoint groups. The following walk-through will take this recommended approach.

### ❖ 9.2.1. Add a User Account to a SharePoint Group

This walk-through will use the recommended method of adding a Windows user account into a SharePoint group to receive the permissions level assigned to that group.

1. Make sure your browser is open to the **Marketing** site.
2. Click the **Site Contents** link and then click the **Site settings** link.



Name	Type	Items	Modified
Documents	Document library	0	3/30/2022 7:
Site Assets	Document library	4	3/30/2022 9:

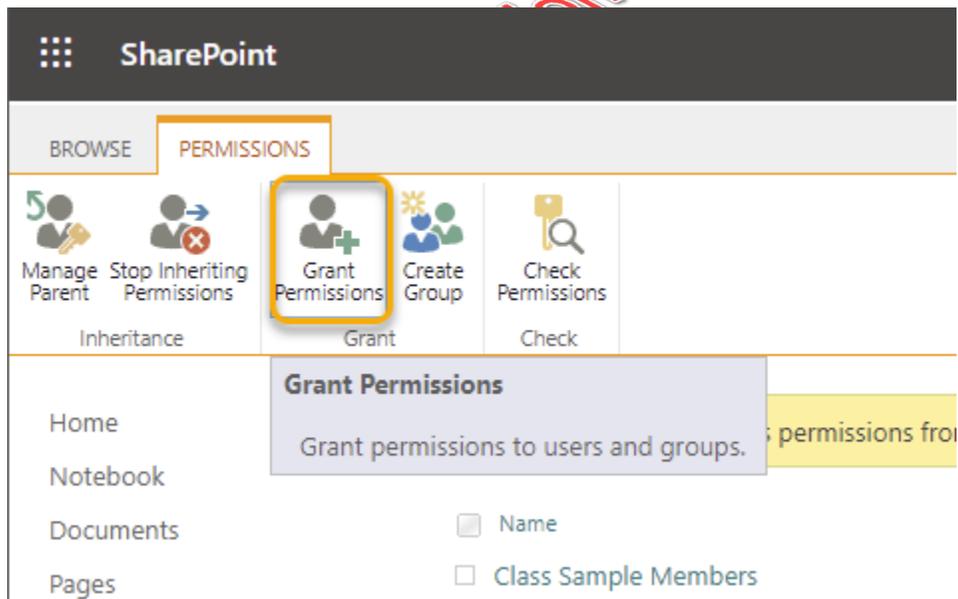
3. Click the **Site permissions** link on the **Site Settings** page.



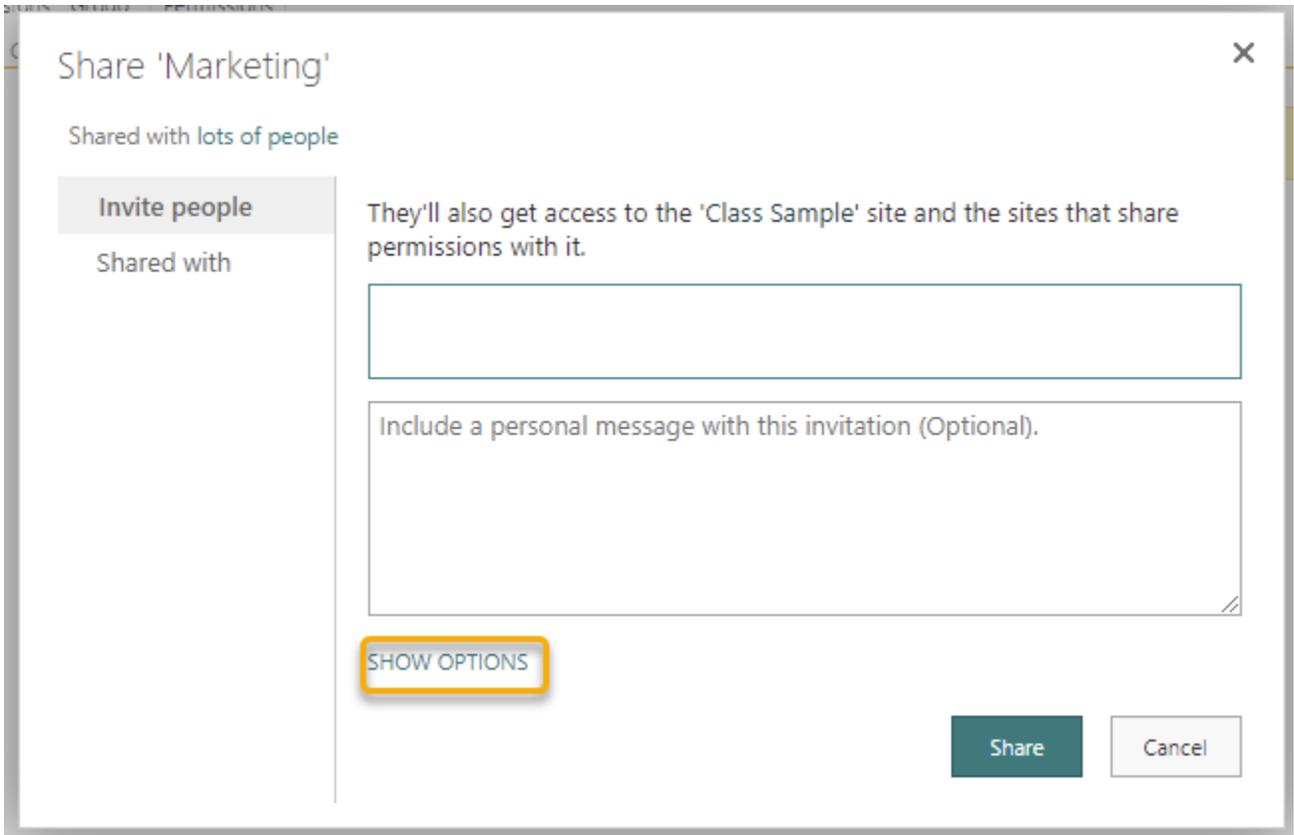
Marketing Accounting  
Site Settings

- Home
- Notebook
- Documents
- Pages
- Site contents
- Users and Permissions
  - People and groups
  - Site permissions**
  - Site app permissions
- Web Designer Galleries
- Site columns
- Look and Feel
  - Title, description, and logo
  - Quick launch
  - Top link bar
  - Change the look

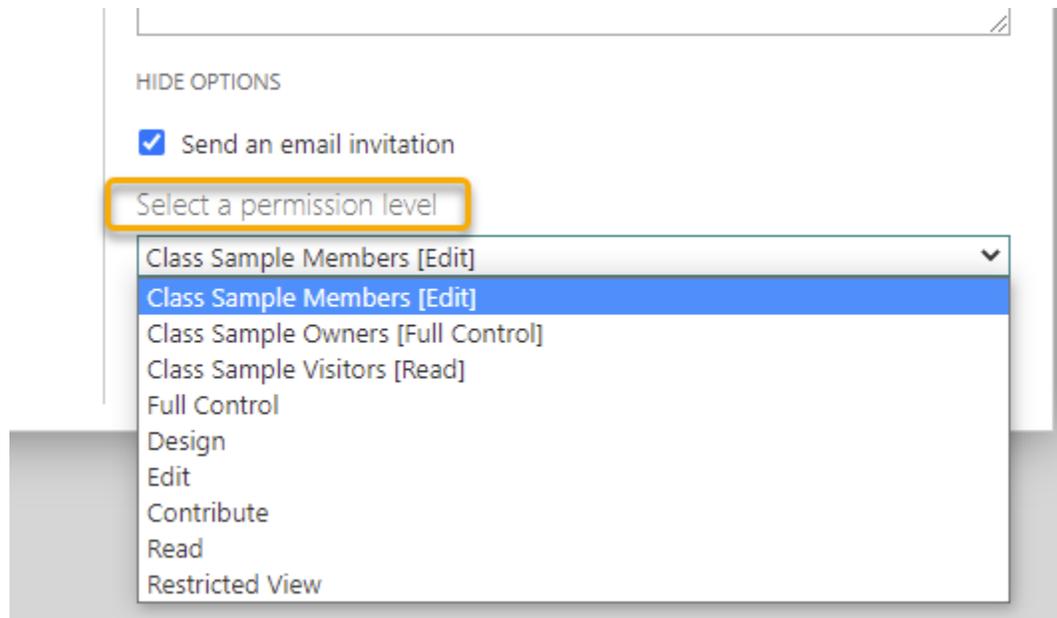
4. Click the **Grant Permission** link button from the **PERMISSIONS** tab toolbar.



5. Enter the name of a co-worker in the **Invite people** field and click the **SHOW OPTIONS** link.



6. Change the **Select a group or permission level** drop-down option to **<<Site Name>> Members [Edit]** and uncheck the **Send an email invitation** option. Click the **Share** button to complete the action.



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\*

## 9.3. Permissions Inheritance

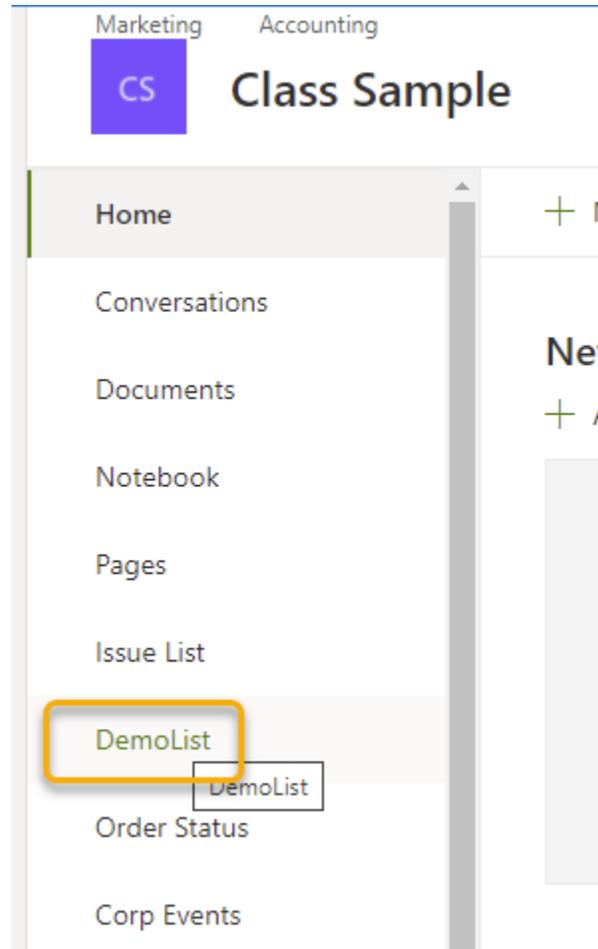
Permissions are initially assigned to the root site of the Site Collection when it is created. Child sites have the option when they are created to use unique permissions or inherit the permissions of the parent site. The default setting is to inherit permissions, but you can always break the inheritance and assign unique permissions any time you like provided you have the permission to do so.

Permissions to lists, libraries, and the items within are similar in that they automatically inherit the permissions of their parent site. Just as with child sites, you can always turn off the inheritance and manage permissions in the list, library, or even the individual item.

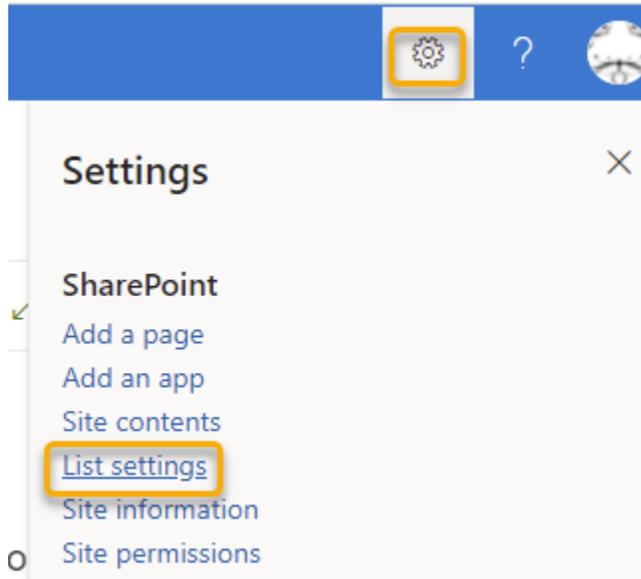
### ❖ 9.3.1. Modifying Permissions Inheritance

This walk-through will turn off permissions inheritance first in the **Demo List** and then in the child site **Marketing**.

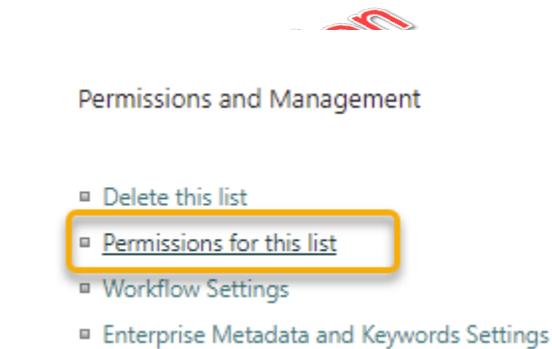
1. Make sure our browser is open on your Class Sample site.
2. Modify the permissions of the **Demo List**.
  - A. Click the **Demo List** link in the **Quick Launch** menu or in the **Site Contents**.



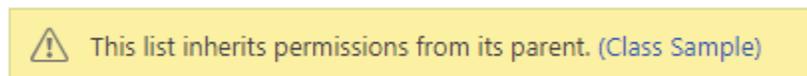
B. Click the **Settings** and choose **List Settings**.



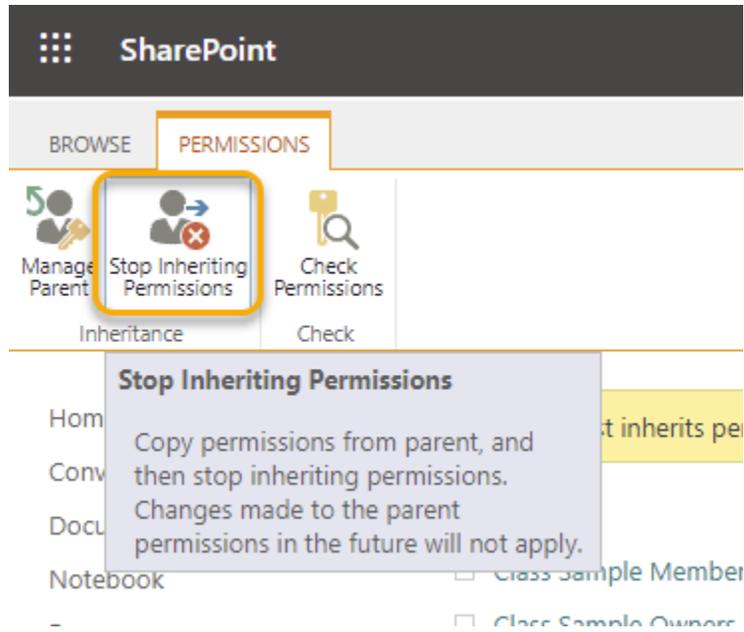
C. Click the **Permissions for this list**.



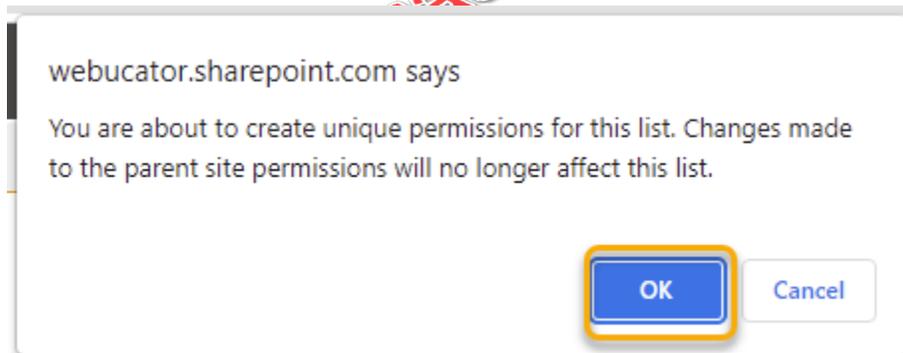
D. Note on the **List Permissions** page for the **Demo List** there is a banner notifying us that the list is inheriting permissions from its parent, **Class Sample Home Site** in this example.



E. Click the **Stop Inheriting Permissions** link button to turn off the inheritance for the **Demo List** list.



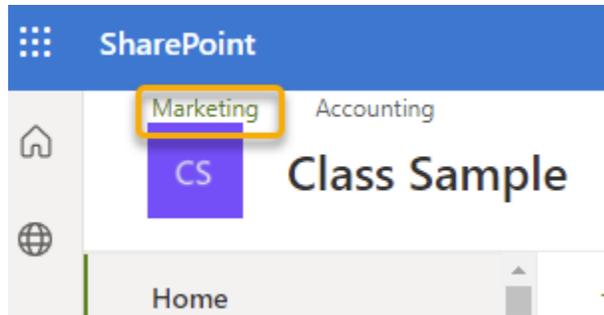
- F. Click the **OK** button on the **Message from web page** dialog window notifying you that permission from the parent will no longer affect this list.



- G. Note that now the **List Permissions** page banner is notifying you that **This list has unique permissions** and the **PERMISSIONS** toolbar has more options.



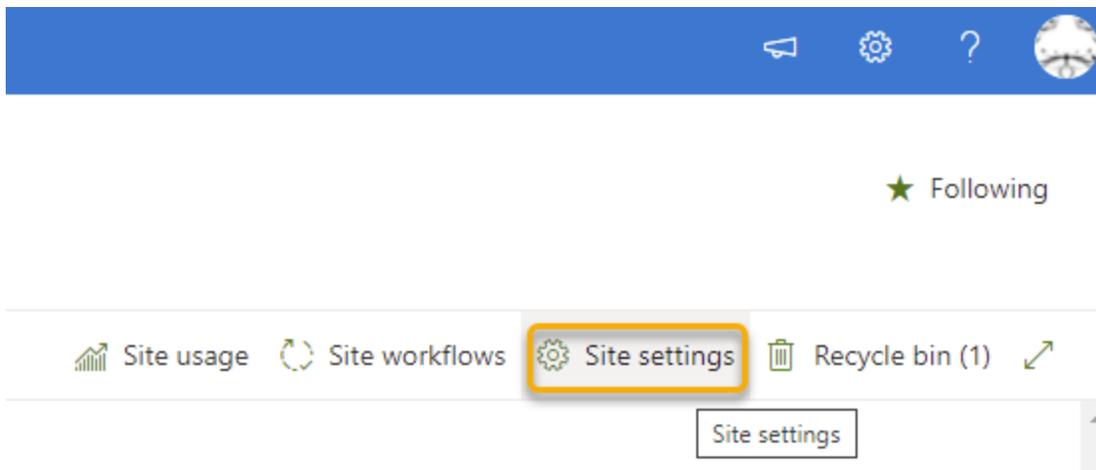
3. Modify the permission of the **Marketing** child site.
  - A. Click the **BROWSE** tab to close the **PERMISSIONS** toolbar then click the **Marketing** link in the **Top Link Bar**.



**Note**

Any child site will do if you do not have one named **Marketing**.

- B. Click the **Settings** menu link and then select the **Site Contents** link from the available options. Click **Site Settings**.

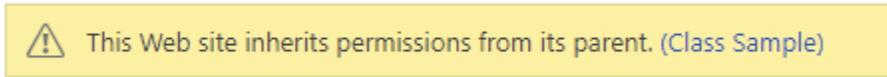


- C. Click the **Site permissions** link on the **Site Settings** page.

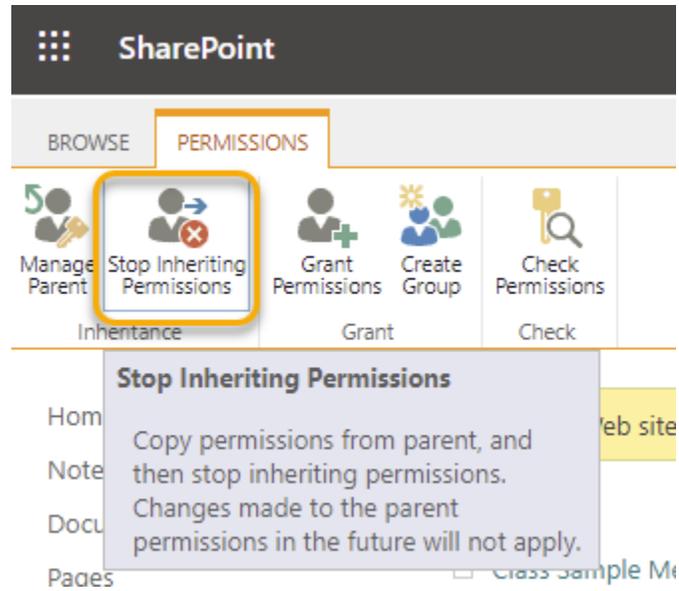
## Site Settings

- Users and Permissions
- People and groups
- Site permissions**
- Site app permissions

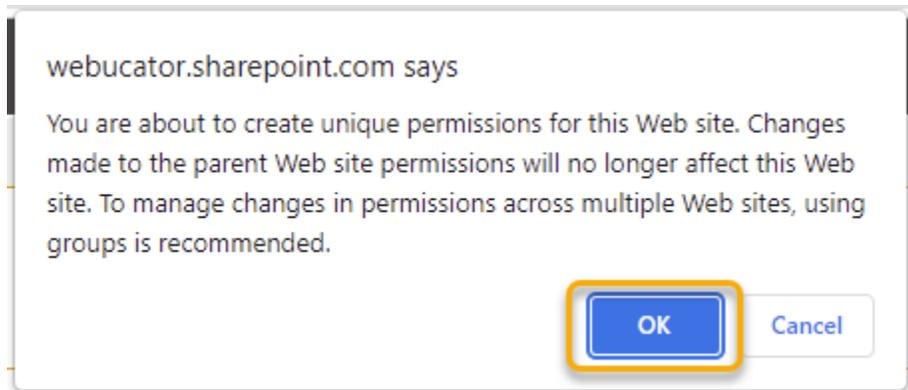
- D. Note on the **Site Permissions** page for the **Marketing** site there is a banner notifying you that the list is inheriting permissions from its parent.



- E. Click the **Stop Inheriting Permissions** link button to turn off the inheritance for the **Marketing** child site.



- F. Click the **OK** button on the **Message from web page** dialog window notifying you that permission from the parent site will no longer affect this site.



- G. When the inheritance is broken, you are given the option of **Use an existing group** or **Create a new group**. For this walk-through, leave it set to the default and click the **OK** button.

# People and Groups ▸ Set Up Groups for this Site

## Visitors to this Site

Visitors can **read** content in the Web site. Create a group of visitors or re-use an existing SharePoint group.

Create a new group  Use an existing group

Class Sample Visitors ▾

## Members of this Site

Members can **contribute** content to the Web site. Create a group of site members or re-use an existing SharePoint group.

Create a new group  Use an existing group

Class Sample Members ▾

## Owners of this Site

Owners have **full control** over the Web site. Create a group of owners or re-use an existing SharePoint group.

Create a new group  Use an existing group

Class Sample Owners ▾

OK

S

- H. Follow the earlier steps to navigate back the **Site permissions** page for **Marketing**.
- I. Note that now the **Site Permissions** page banner is notifying you that **This website has unique permissions**.

# Exercise 11: Working with SharePoint Permissions

🕒 15 to 25 minutes

In this exercise, you will learn to manage permissions on your SharePoint site.

1. Make sure your browser is open to the **Accounting** site.
2. Click the **Settings** link and then select the **Site Contents** link and then click **Site Settings**.

The screenshot shows a SharePoint site interface for a site named 'Marketing'. The breadcrumb navigation shows 'Contents' and 'Subsites'. The 'Contents' tab is active. Below the navigation, there are links for 'New', 'Site usage', and 'Site workflows'. A table displays the following data:

Name	Type	Items	Modified
Documents	Document library	0	3/30/2022 7:...
Site Assets	Document library	4	3/30/2022 9:...

3. Click the **Site permissions** link on the **Site Settings** page.

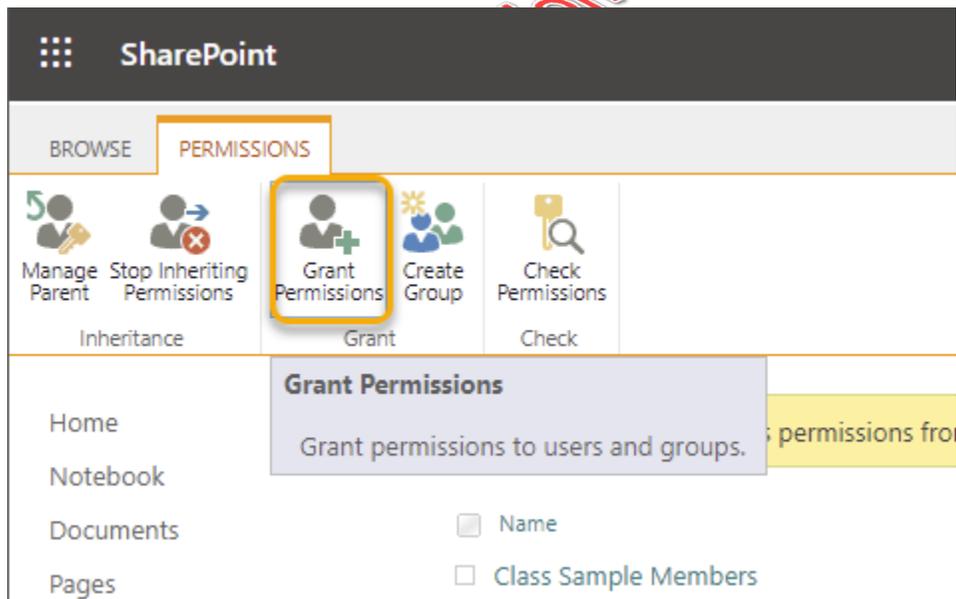


Marketing Accounting  
Site Settings

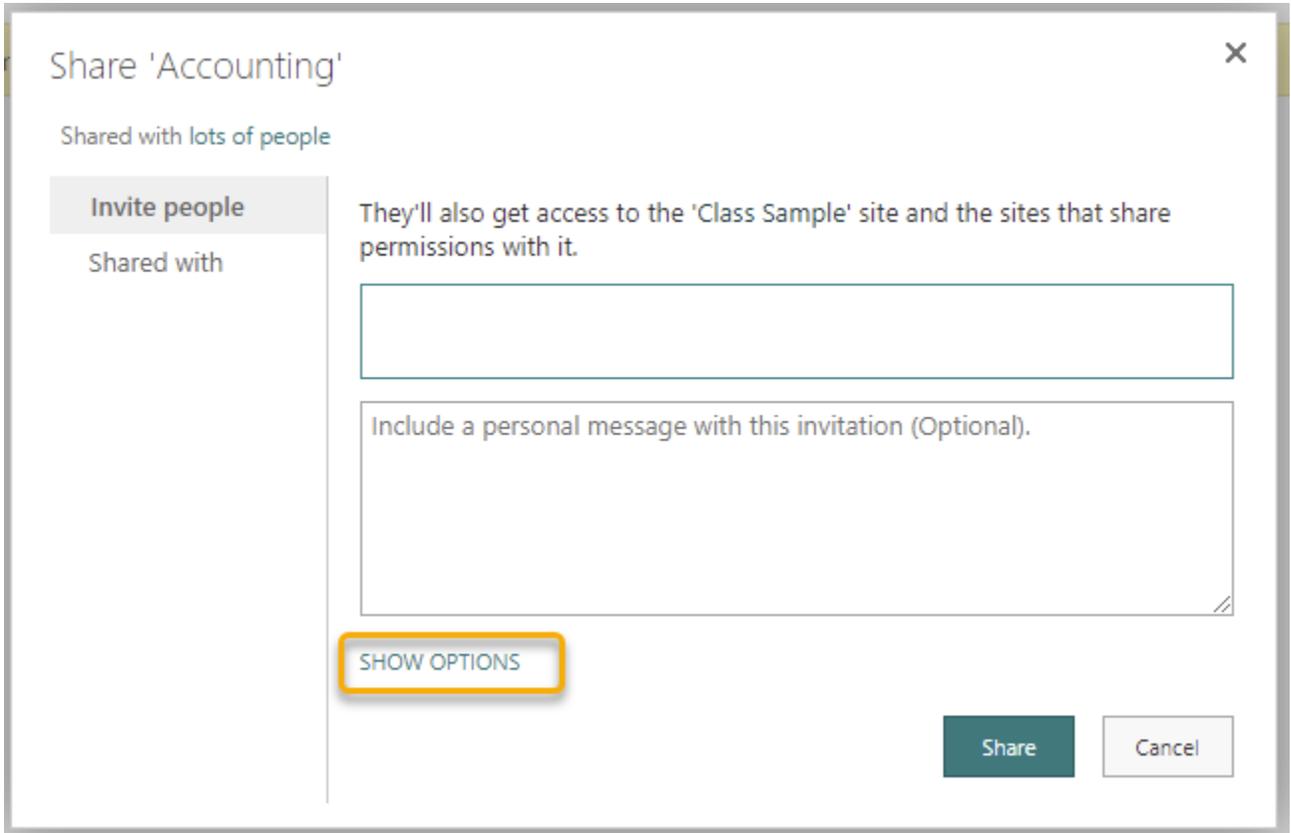
- Home
- Notebook
- Documents
- Pages
- Site contents
- Users and Permissions
  - People and groups
  - Site permissions**
  - Site app permissions
- Web Designer Galleries
- Site columns
- Look and Feel
  - Title, description, and logo
  - Quick launch
  - Top link bar
  - Change the look

Define what capabilities each user or user group can perform on this site and all sub-sites.

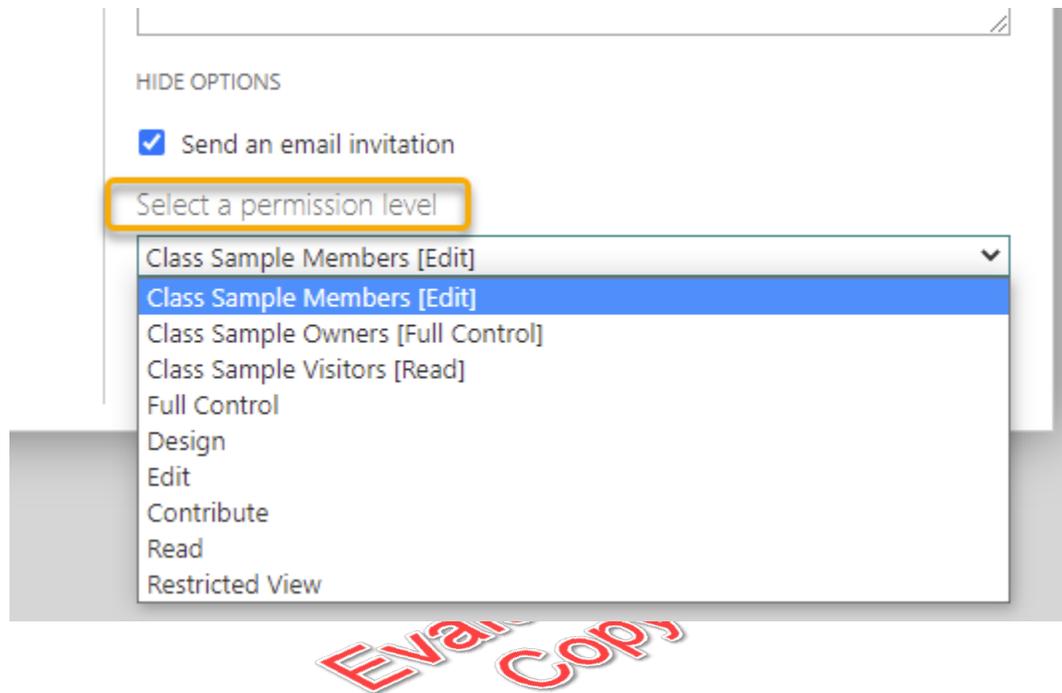
- Click the **Grant Permission** link button from the **PERMISSIONS** tab toolbar.



- Enter the name of a co-worker in the **Invite people** field and click the **SHOW OPTIONS** link.



6. Change the **Select a group or permission level** drop-down option to **<<Site Name>> Members [Edit]** and uncheck the **Send an email invitation** option. Click the **Share** button to complete the action.



## Conclusion

In this lesson, you have learned:

- About SharePoint groups.
- How to create SharePoint groups.
- How to assign permission in SharePoint.
- How to manage permission inheritance at the site level.
- How to manage permission inheritance at the list or library level.