Introduction to SharePoint for Office 365 Training

with examples and
hands-on exercises

WEBUCATOR

Version: 3.0.1

The Author

Bruce Gordon

Bruce Gordon has been a Microsoft Certified Trainer since 1995. He has taught Microsoft Official Curriculum (MOC) courses on ASP.NET, ADO.NET, XML Web services, Windows Forms, WPF, Silverlight, SharePoint, SQL and various other Microsoft product courses. Bruce is also active in the creation of custom courseware. Bruce's most recent custom courseware include SharePoint titles that are available through the Microsoft courseware library. In the past, Bruce has created courses and materials for certification prepping. Bruce's preferred style of teaching is demonstration oriented. Whenever possible he uses live demonstrations in place of PowerPoint slides. This style of teaching allows Bruce to cover not only topics from a courseware manual but also real-world topics outside the manual. Additionally this style tends to be more engaging to his students. Bruce's classes include plenty of hands-on lab work to give students practical experience working with the technology. Bruce's students consistently provide excellent feedback, commenting on his interactive approach, encouragement of questions, and overall knowledge.

Class Files

Download the class files used in this manual at
https://static.webucator.com/media/public/materials/classfiles/SHP365.5-3.0.1-introduction-to-sharepoint-for-office-365-training.zip.

Errata

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

Table of Contents

LESSON 1
SharePoint 365 Setup

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.

✳

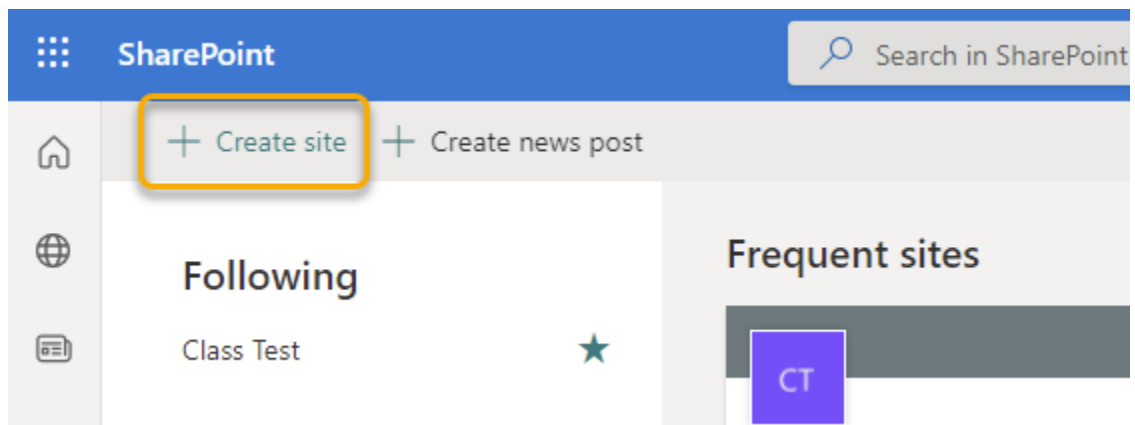
1.1. SharePoint Online
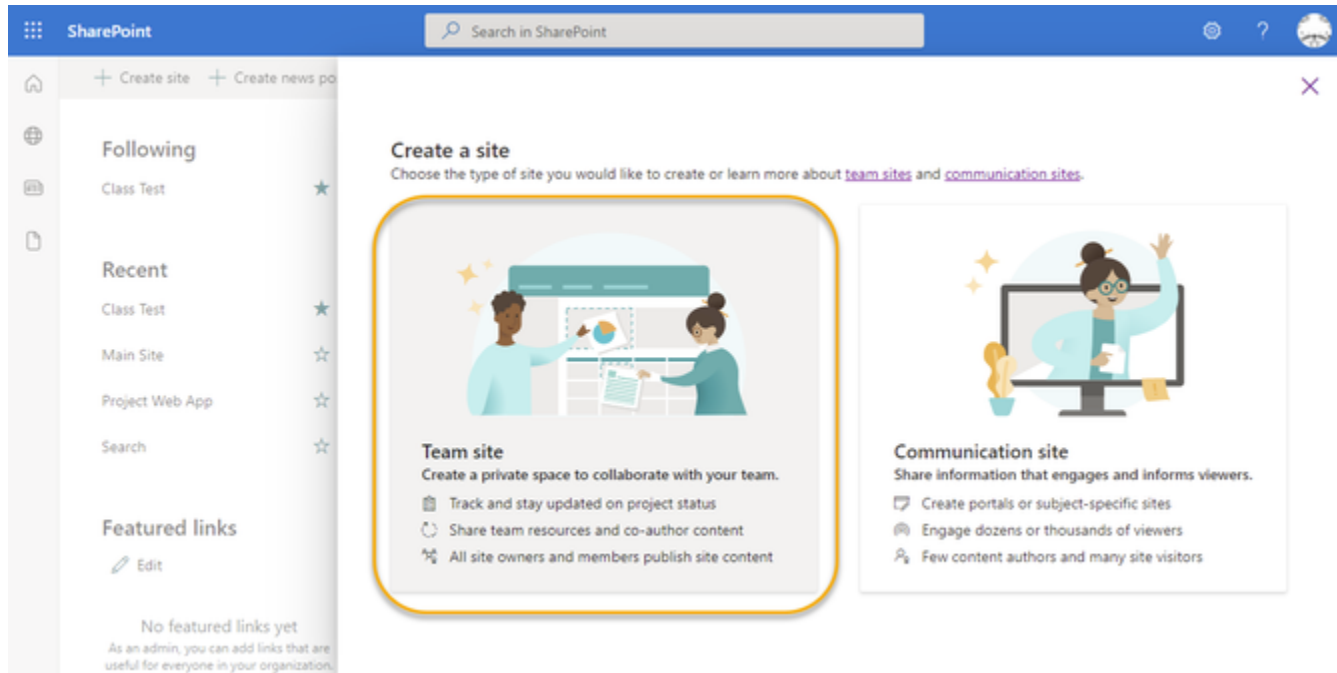
1. Navigate to your Office 365.

    A. Launch your preferred browser.

    B. Log in to your Office 365.

    C. Choose **SharePoint** from the Apps list:
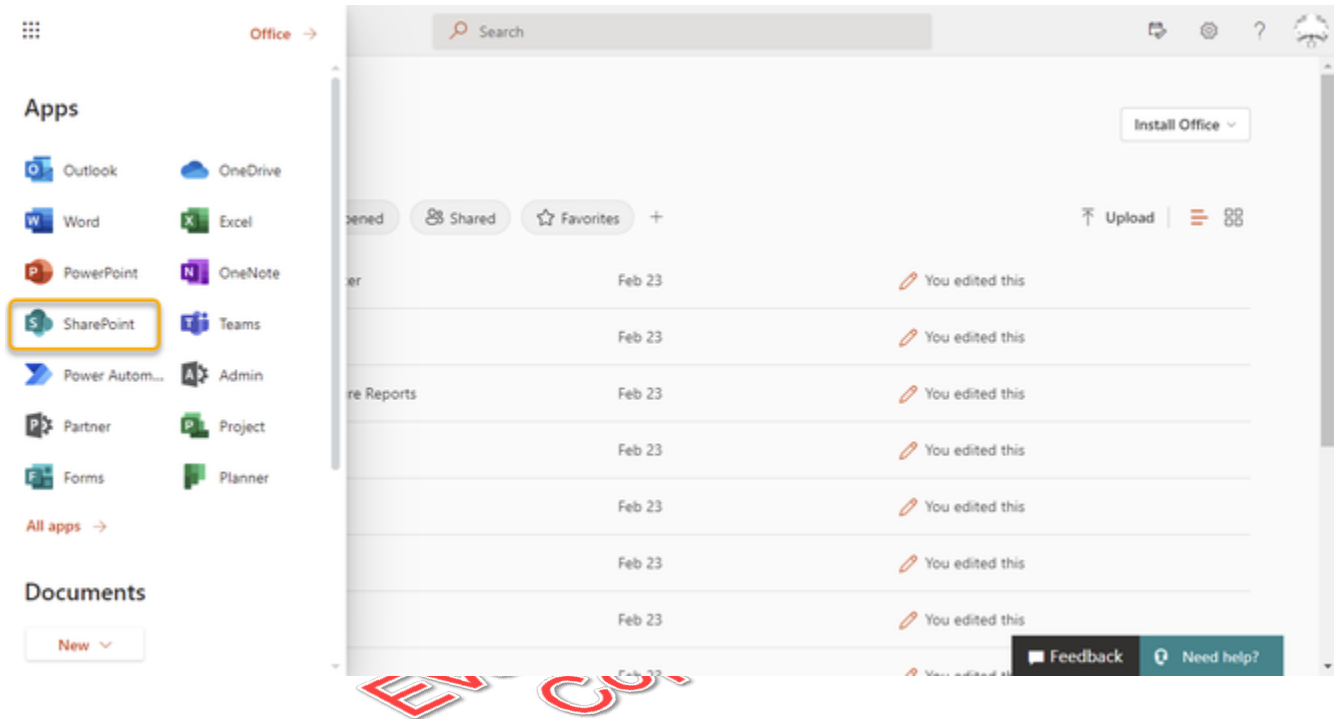
D. Click **Create Site**:

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**:

G. Leave the group members blank for now and click **Finish**:
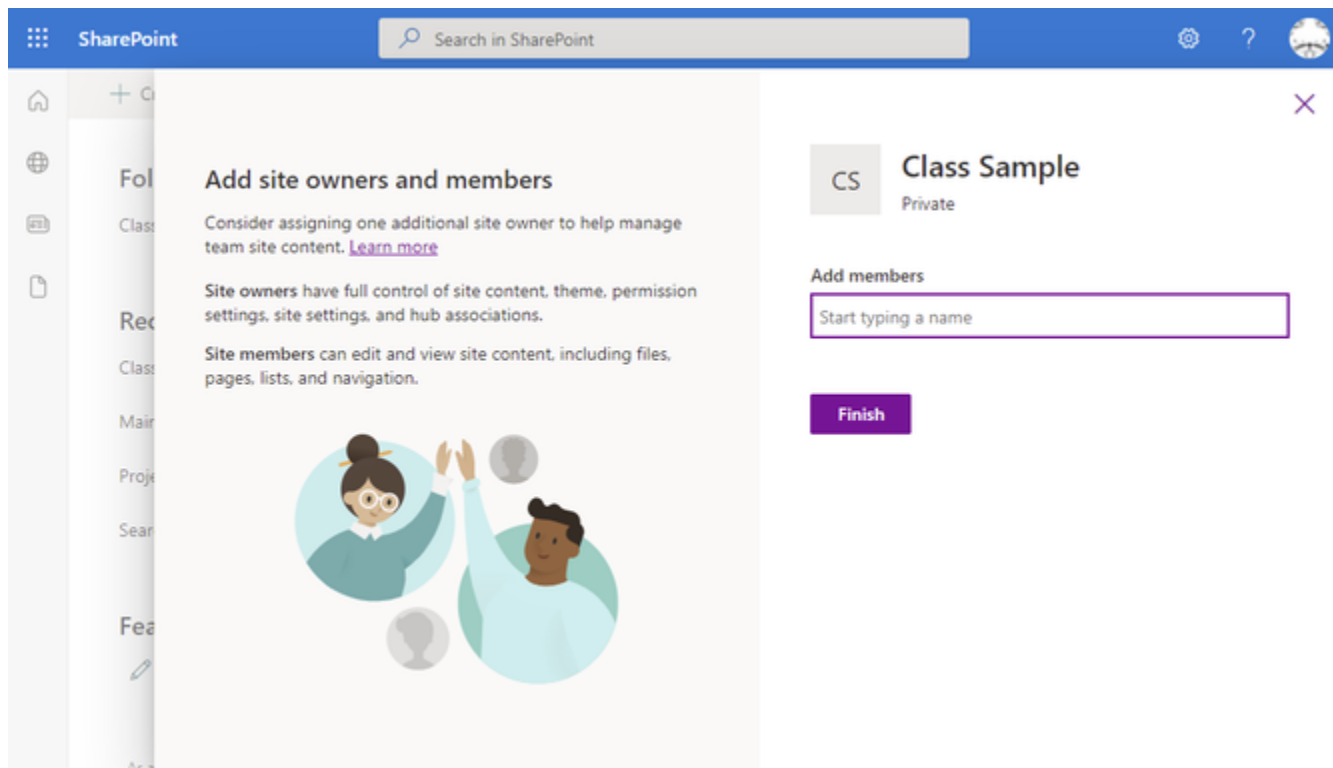
H. The site is now ready for class:
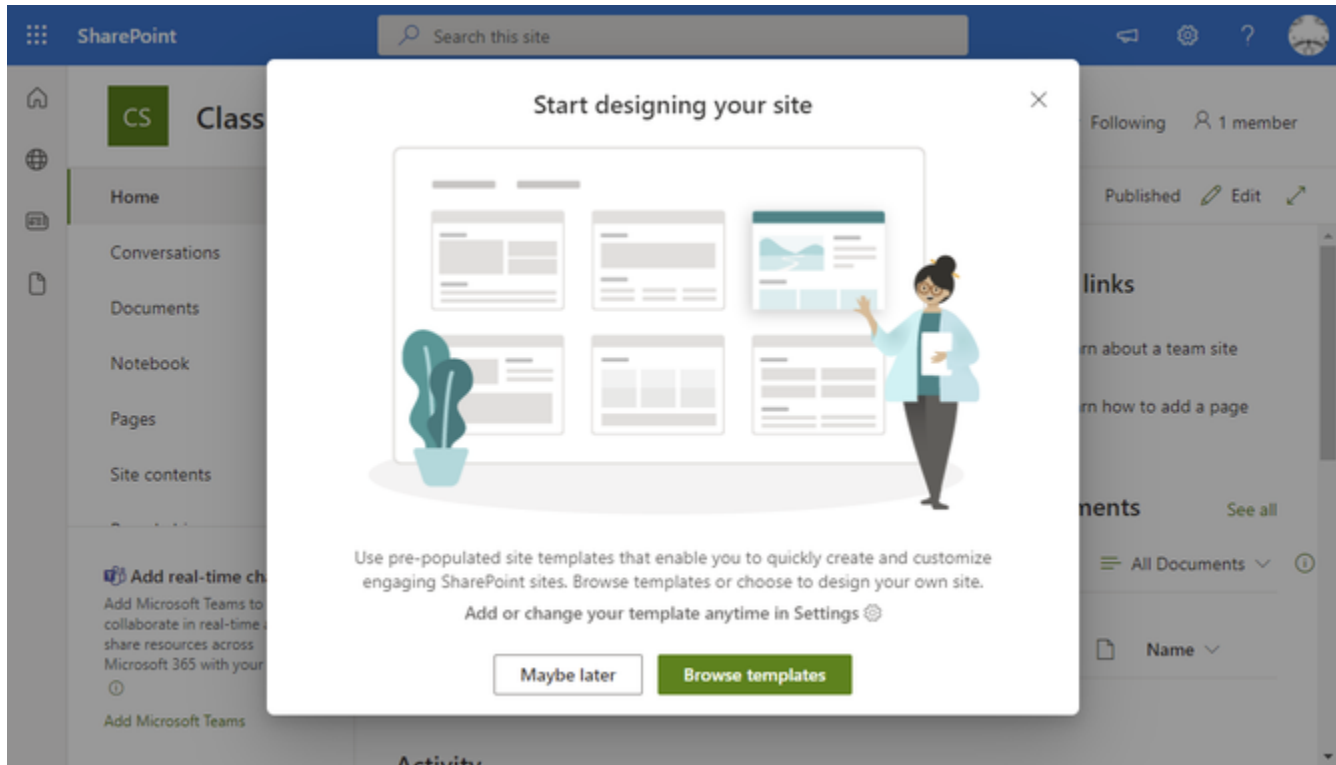
Security Issues
If you encounter security issues, reach out to your site administrator.

Conclusion

In this lesson, you have learned:

- How to set up the sample site for class.

EVALUATION COPY: Not to be used in 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.**:
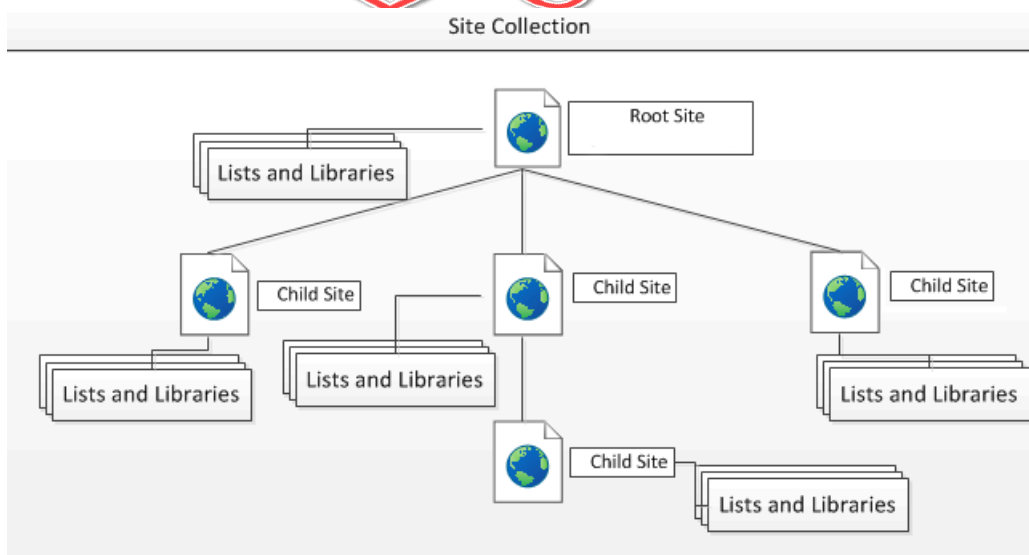
🖹 Exercise 1: Team Site Navigation

⊗ 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:
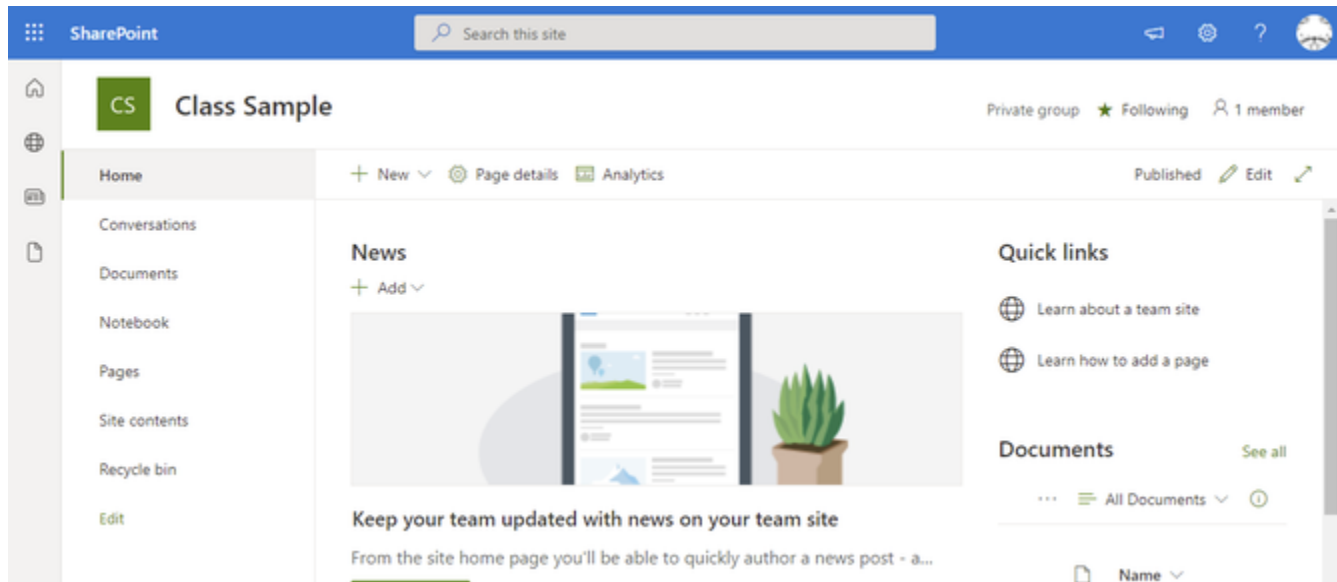
2. Navigate using the Quick Launch menu.

    A. Select the **Documents** inside the Quick Launch menu located on the left side of the page:
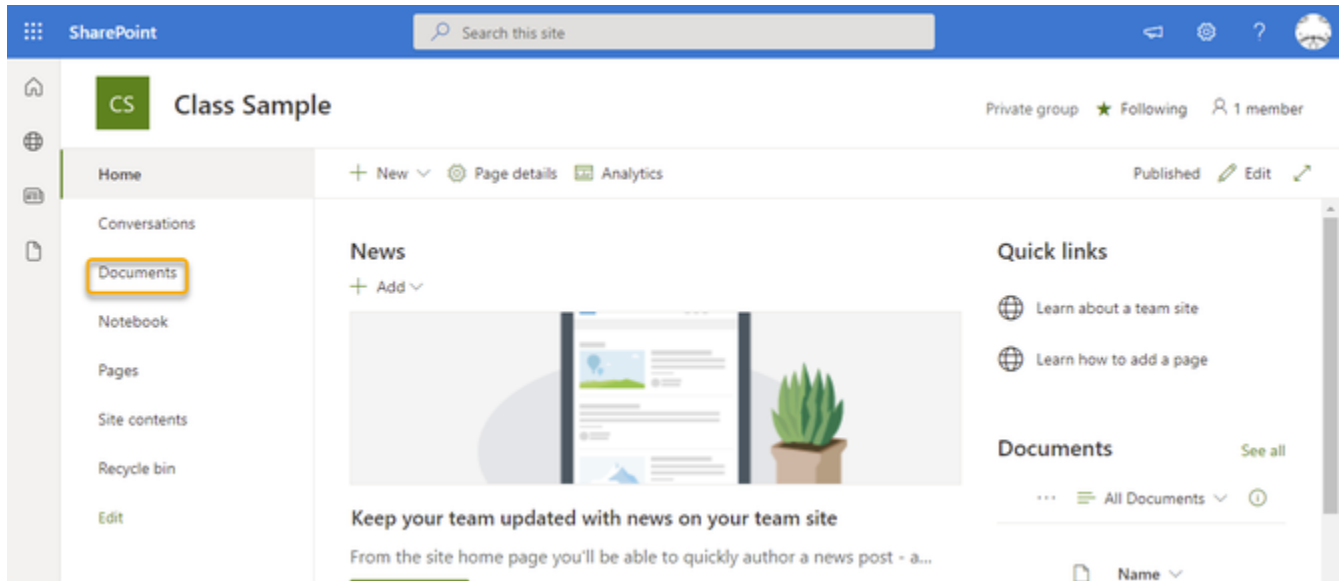
B. Navigate back to the home page of the site by clicking the **Home** link within the **Quick Launch** menu:
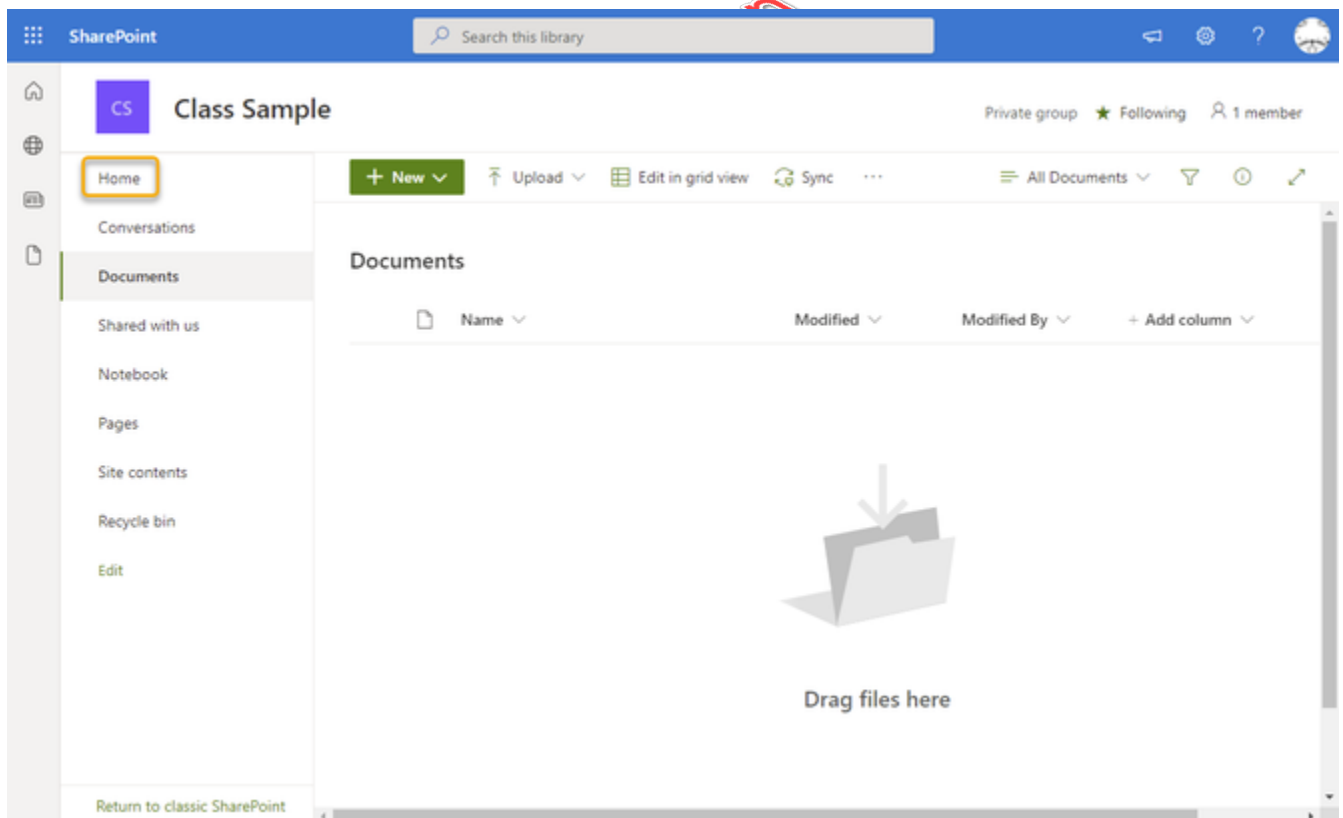
3. Navigate using the **Settings** menu.

    A. Click the **Settings** menu icon located at the top right of your Team Site:
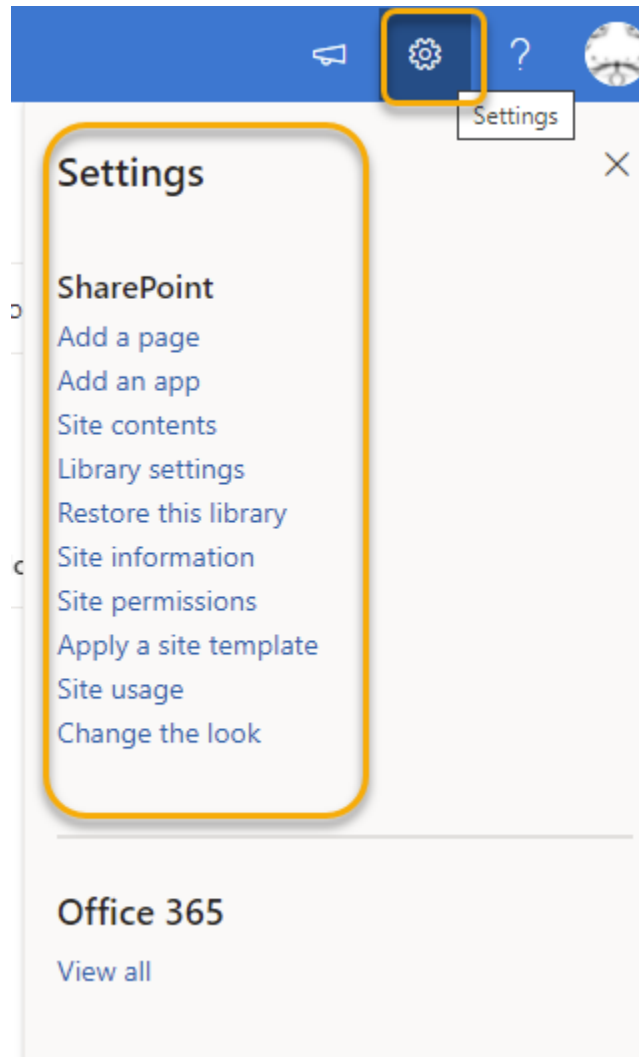
    B. Take a few moments to read through the list of links in the **Settings** menu. The items you see in the list reflect who you are logged into the site as. The list uses security trimming to show only items that you have permission to use.

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.
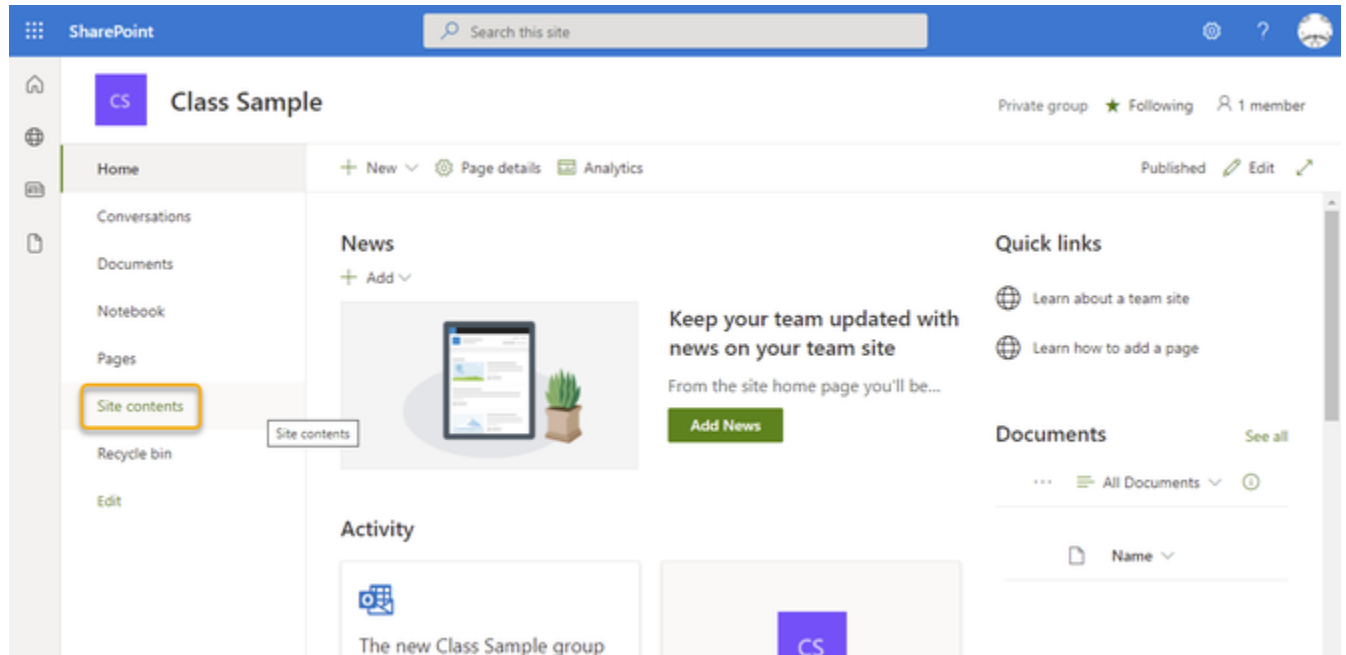
3.2. Creating Lists

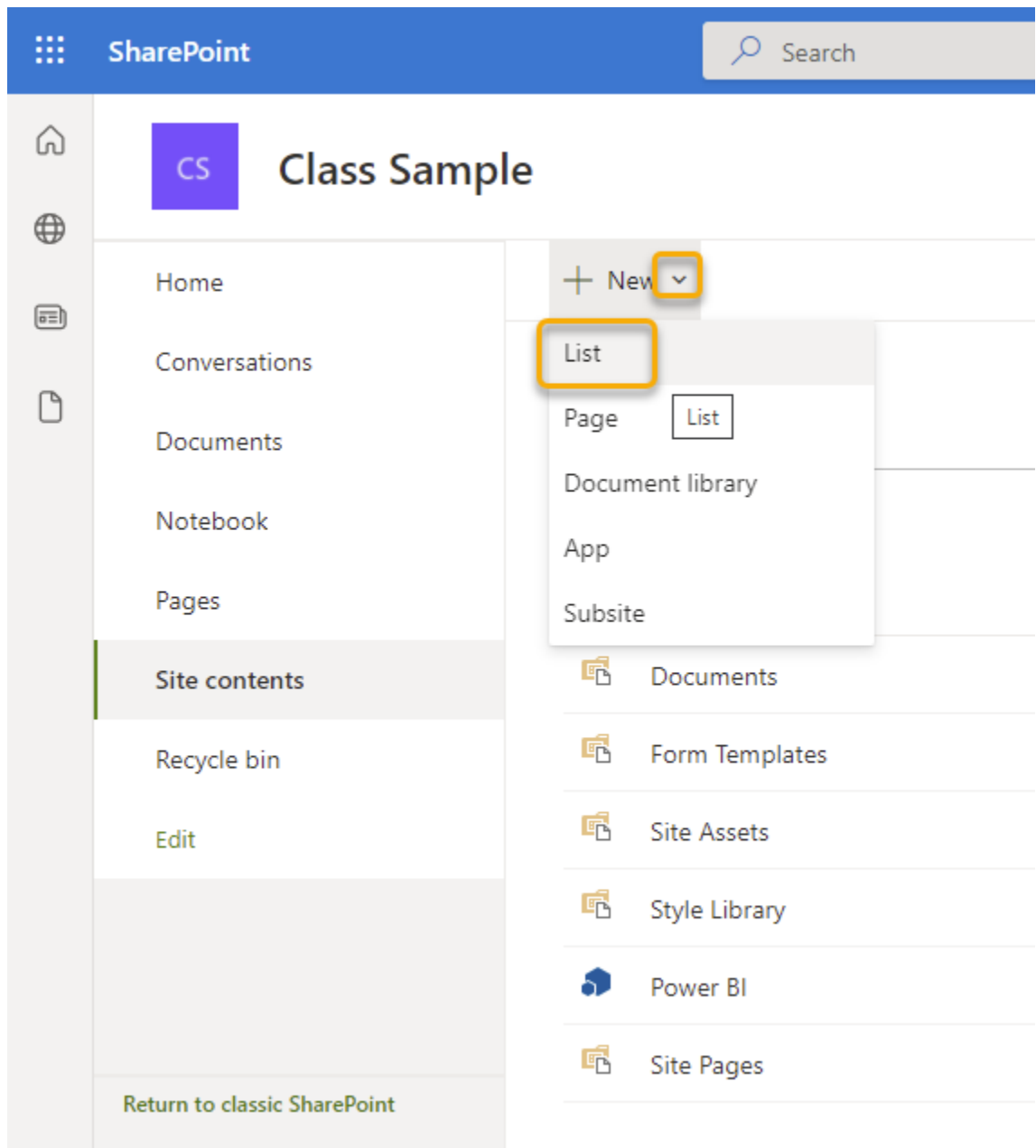## ❖ 3.2.1. Creating Lists Using List Templates

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.
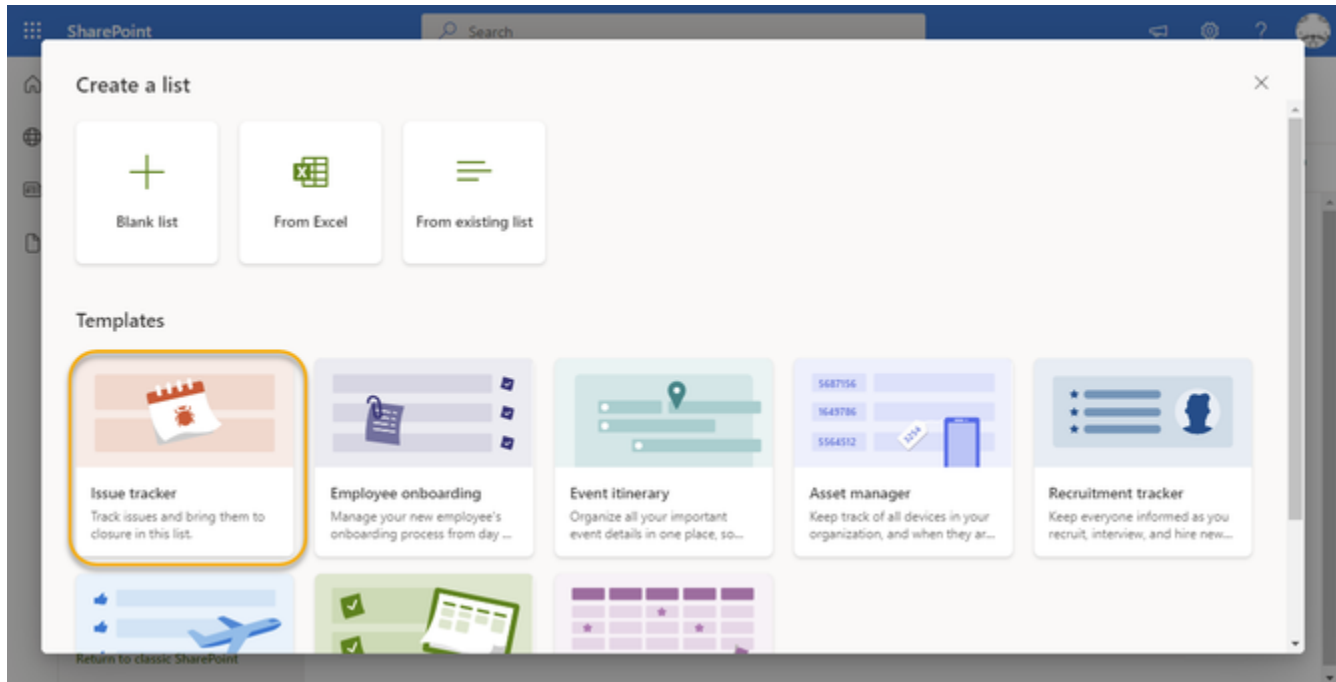
1. Create an instance of a Issue Tracker list.

    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.
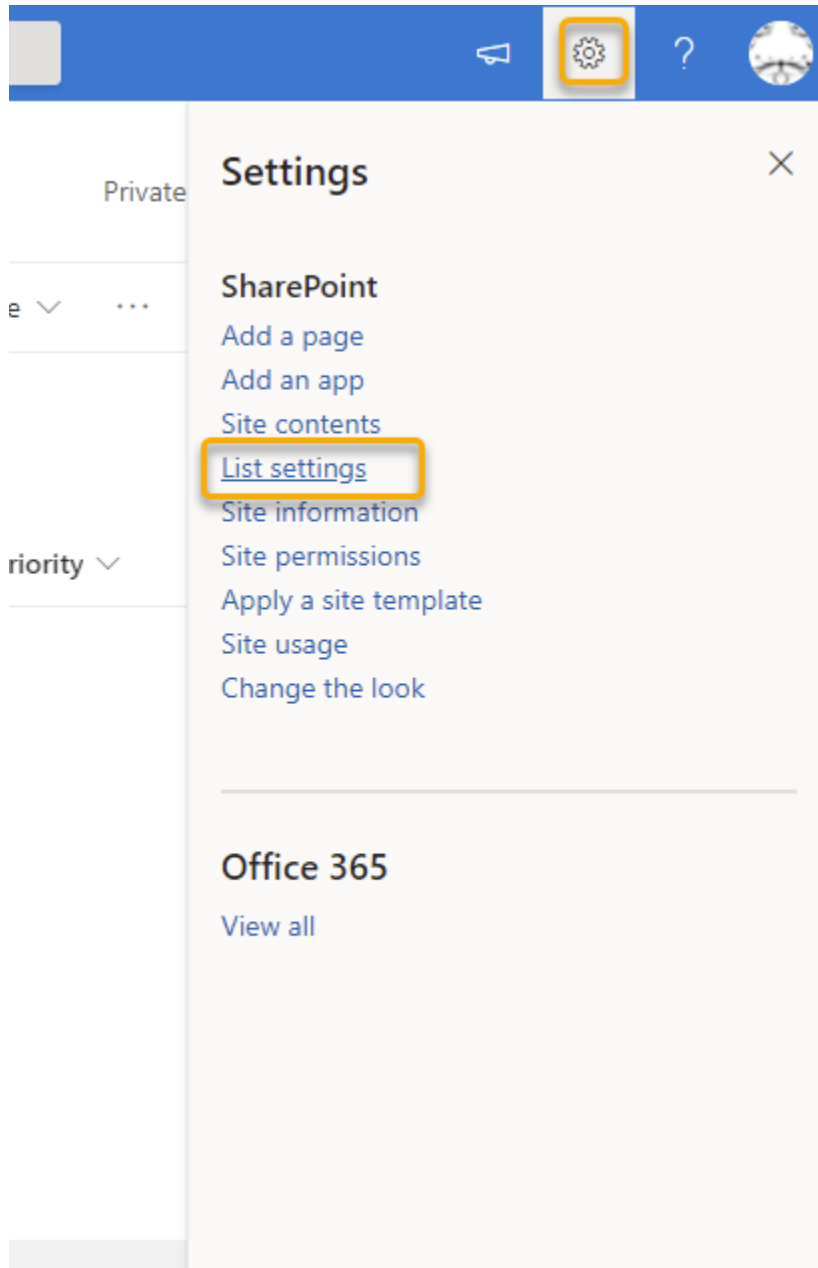

D. Click **Use Template**.
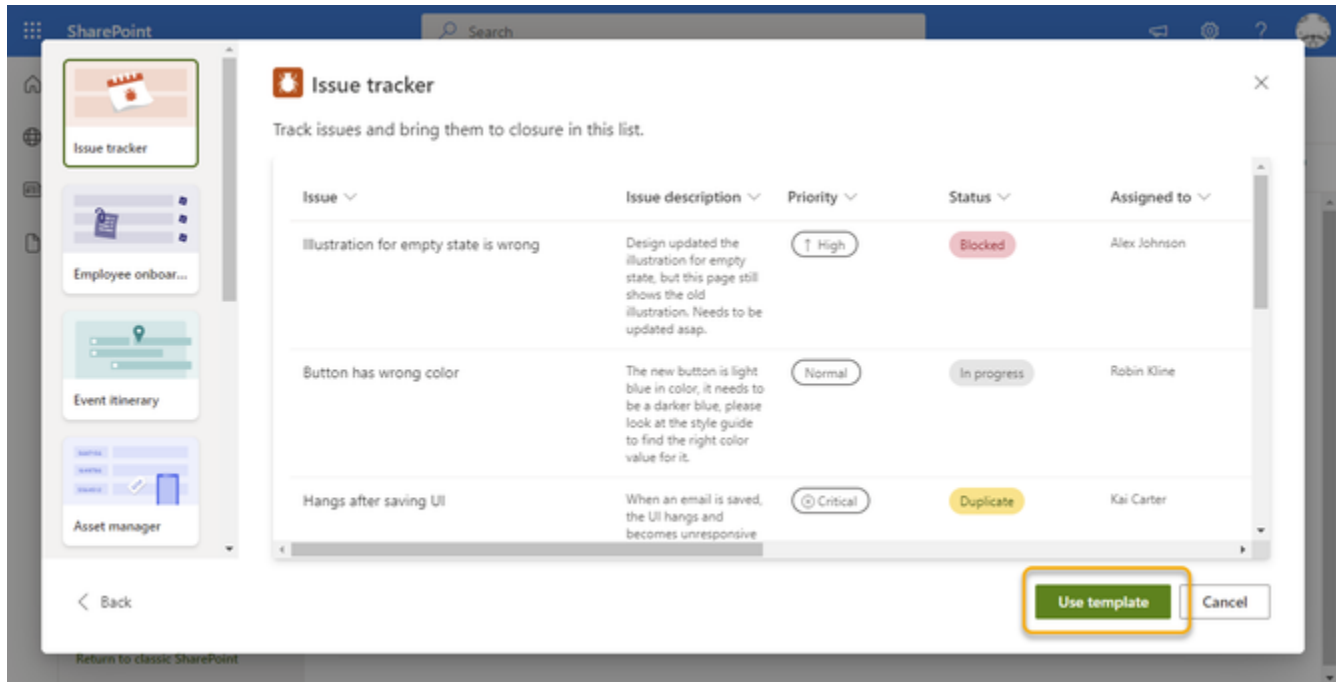
E. Type in a name "Issue List" and description "List for class". Click **Create**:
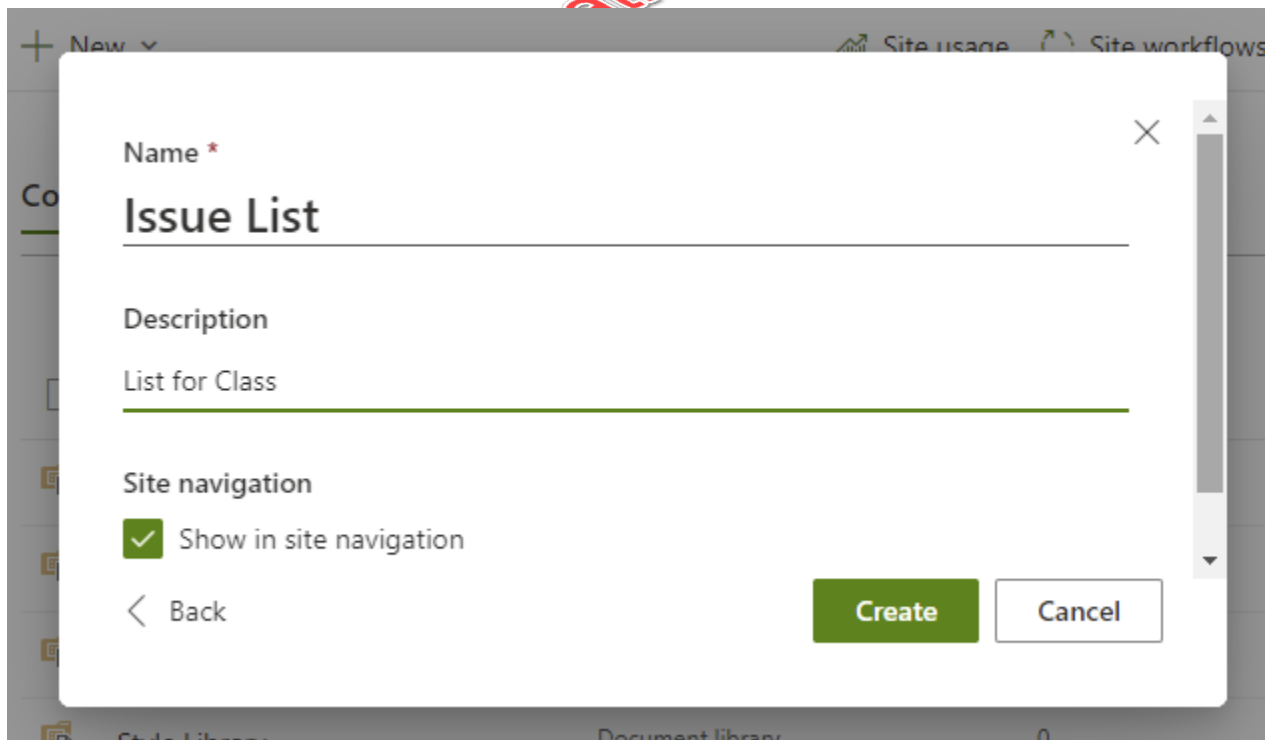
2. To review the list settings, click **Settings > List settings**:

3. Navigate back to list:

Click Issue list to navigate back to the main list.
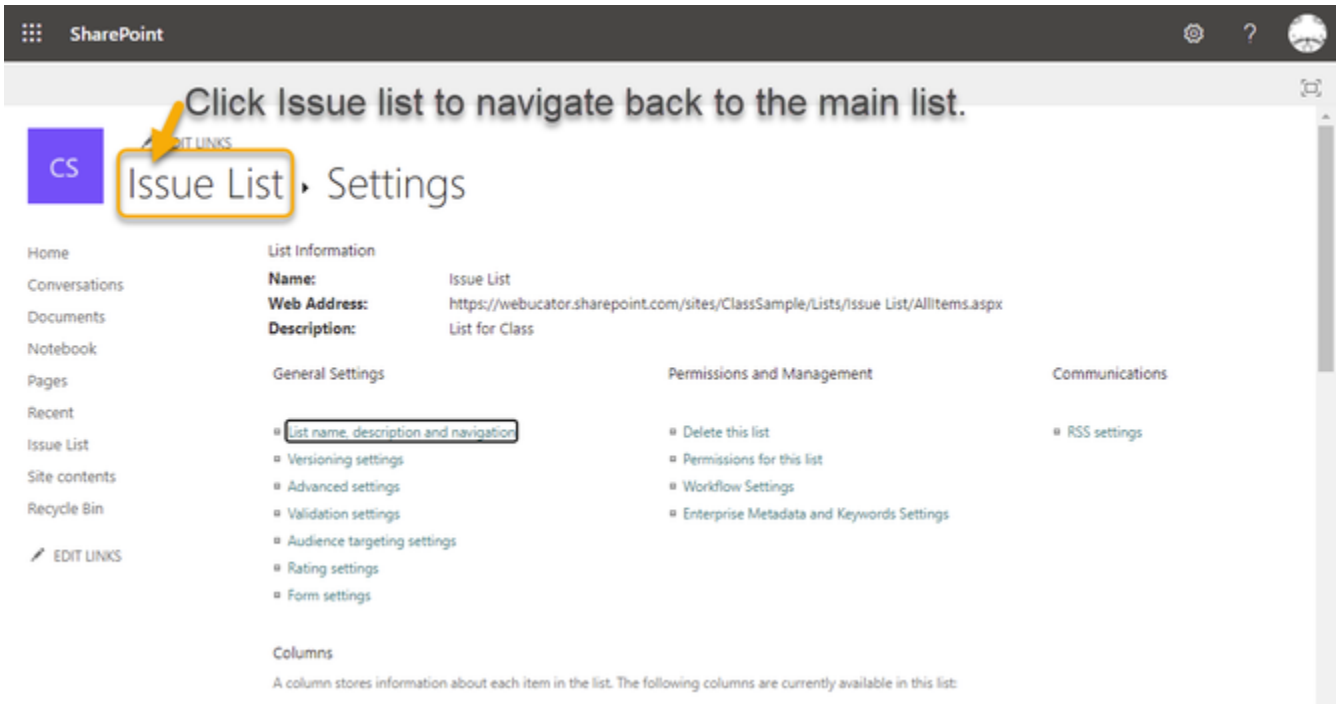
4. Create a new item in the list.

    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:

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

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

*

3.3. List Columns

❖ 3.3.1. Creating List Columns

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

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

   A. Click the **Settings** menu and then choose the **Site Contents** menu item. Click **New** and choose **List**:
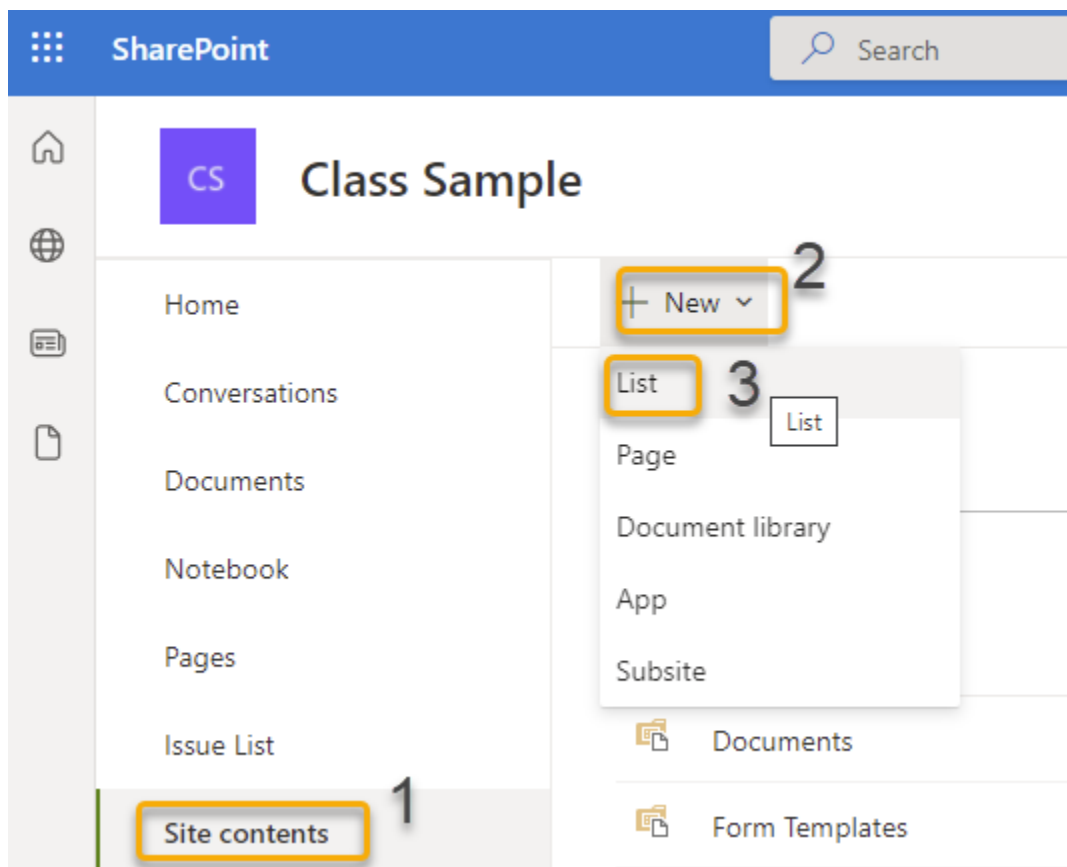
   B. Select the **Blank List** template from the list of available templates.
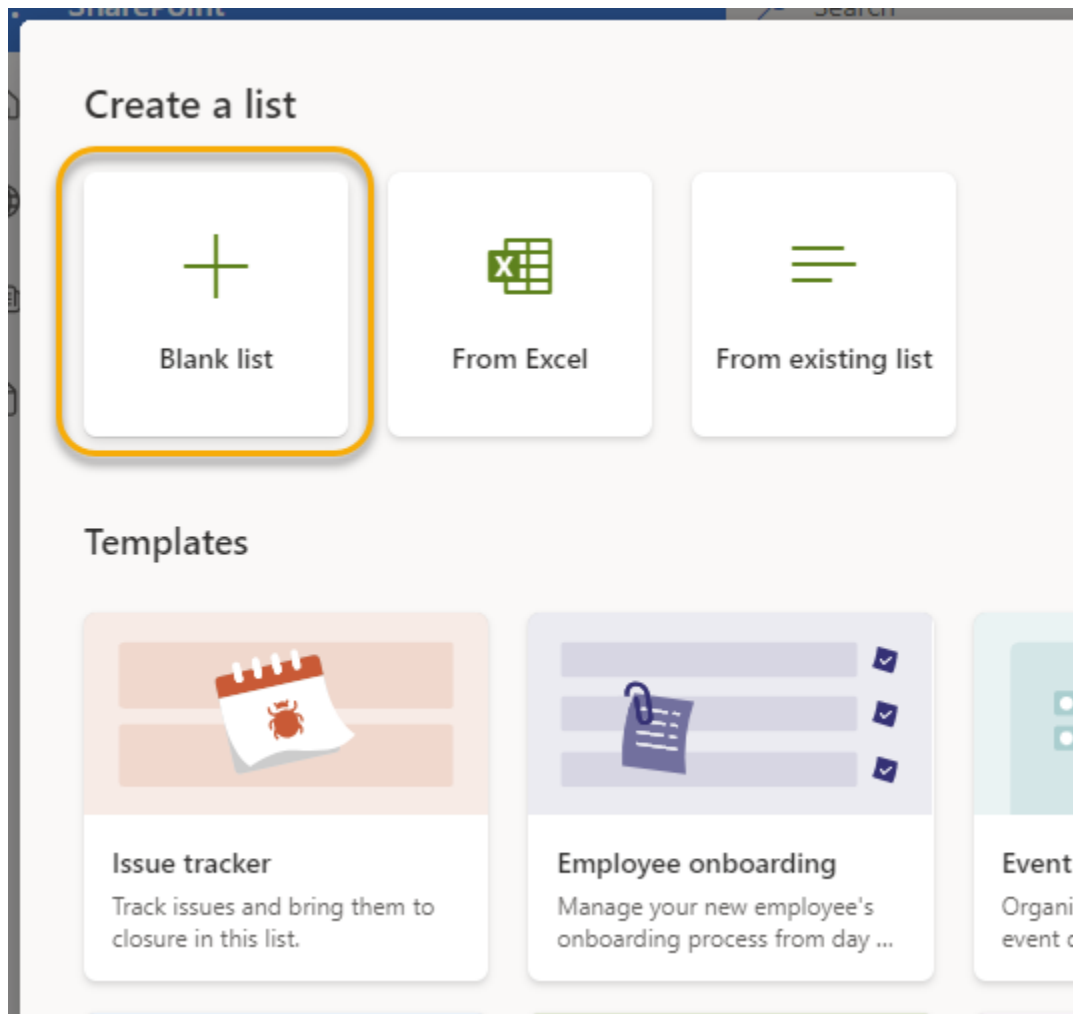
C. Enter "DemoList" in the **Name** field and then click the **Create** button.

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:
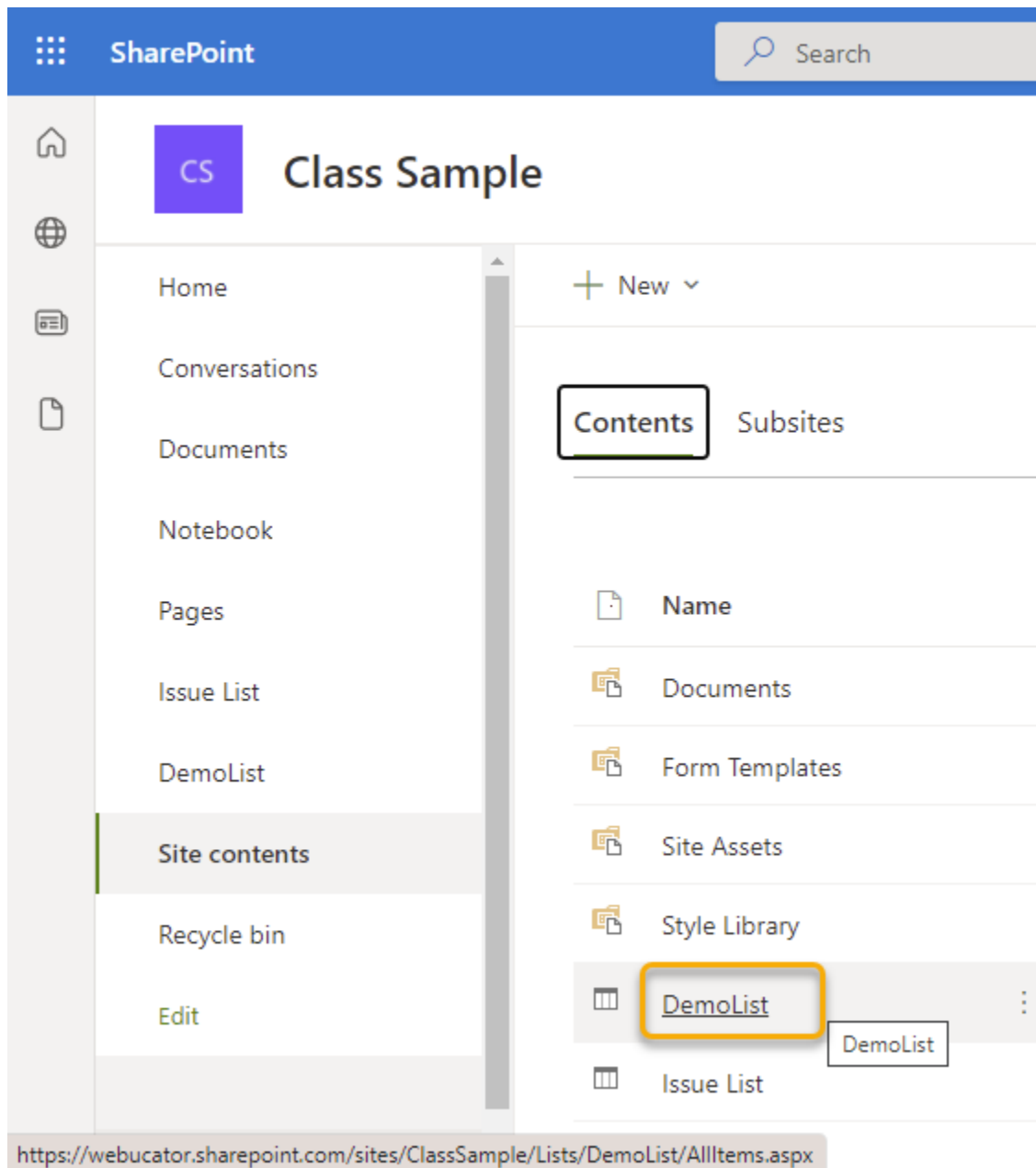
B.   Click the **List Settings** on the **Settings** to open the lists options. NOTE: If you use a different template or Classic layout you may need to click the List tab, List settings:
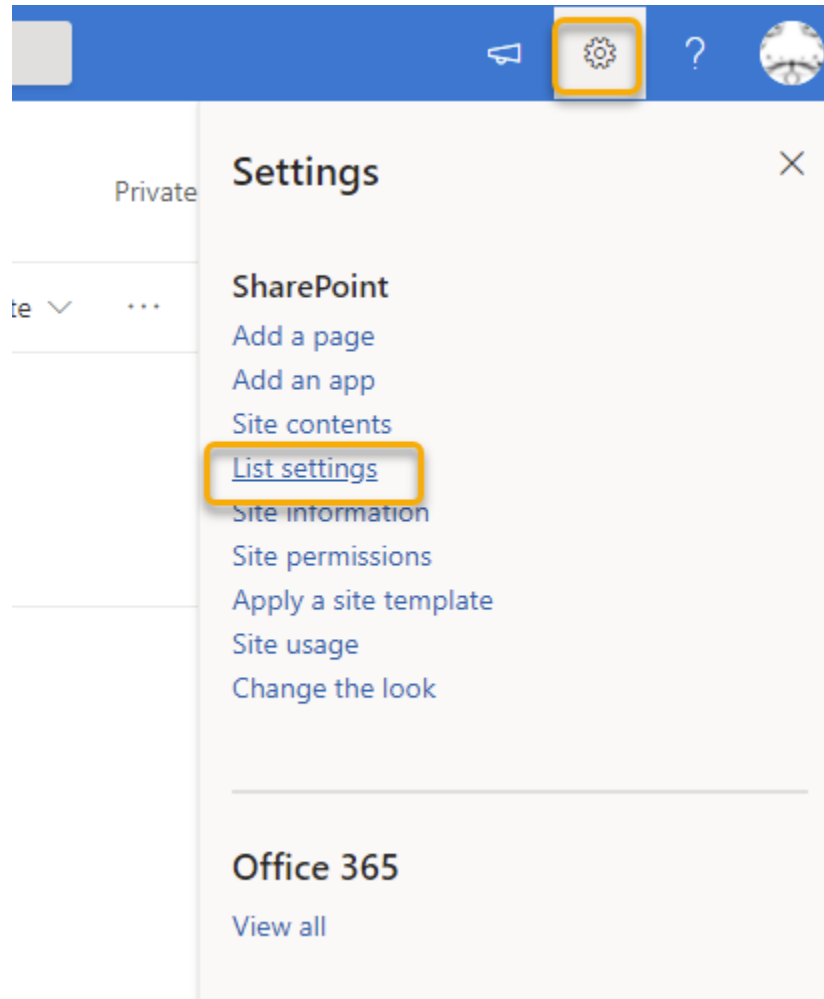
C. Click the **Create Column** button under the **Columns** category:

SharePoint

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**:

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**:
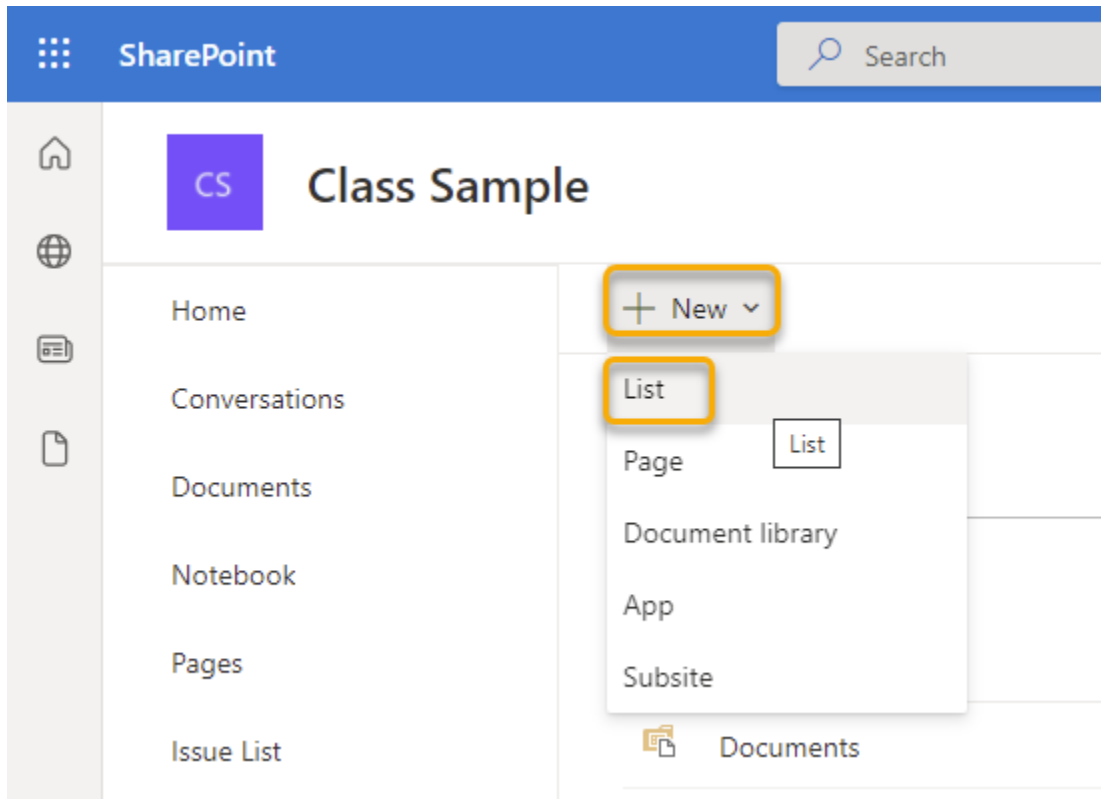
     ii. Select the **Blank List** template from the list of available templates:
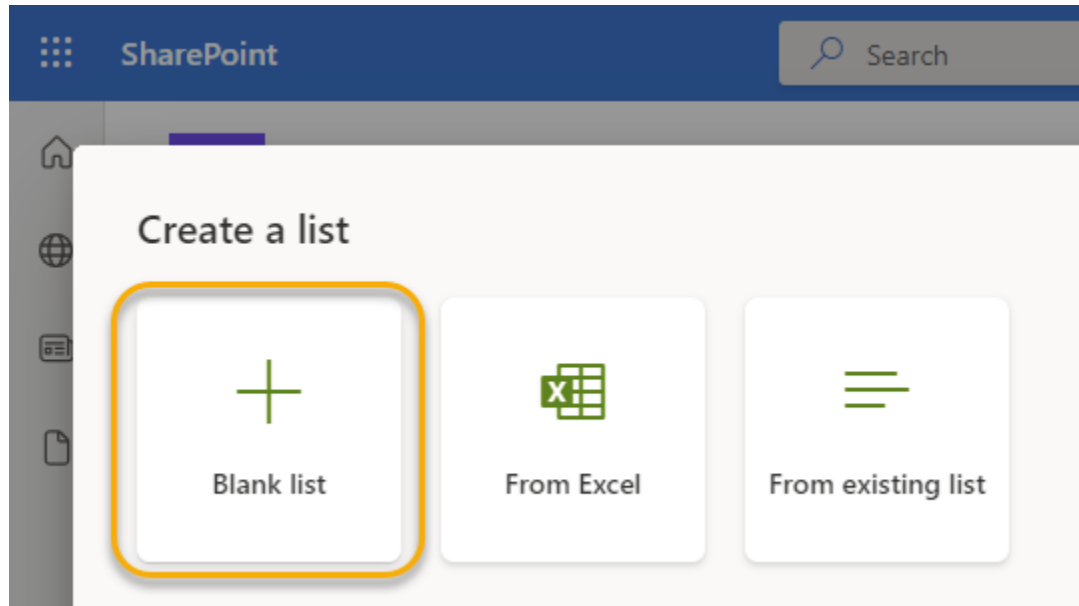
iii. Enter "OrderStatus" in the **Name** field and then click the **Create** button.

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:
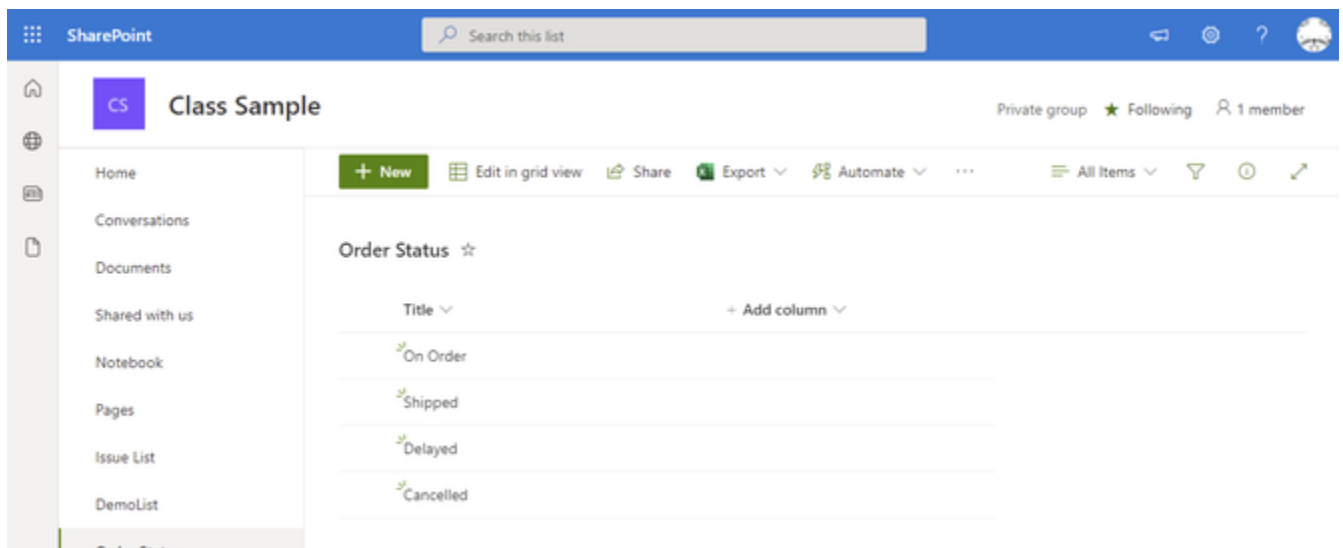
G. Click the **Demo List** link in the **Site Contents**:
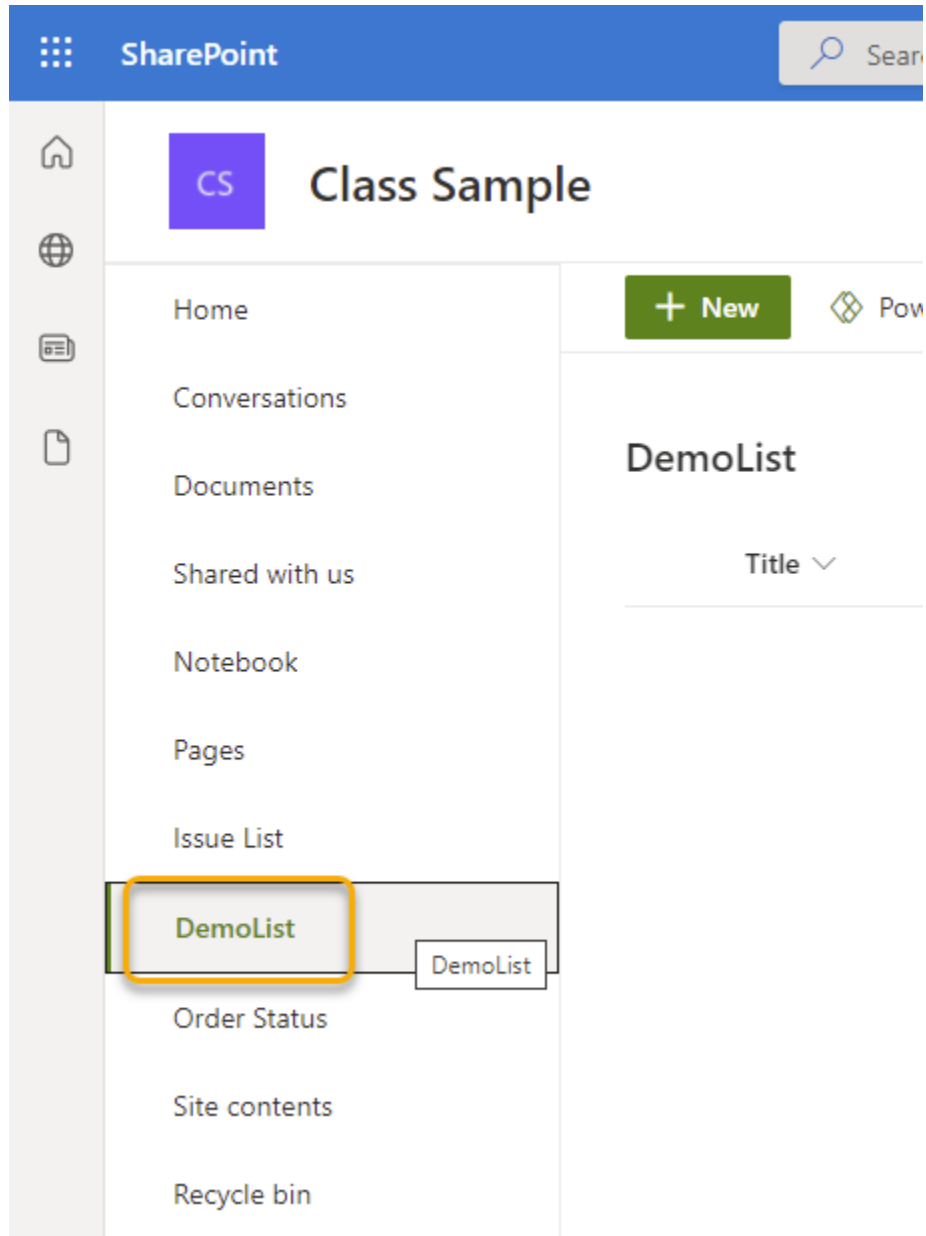
H. Click the **List Settings** on the **Settings** to open the lists options.

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 below.
Remove the text from the box to clear the custom formatting.

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:
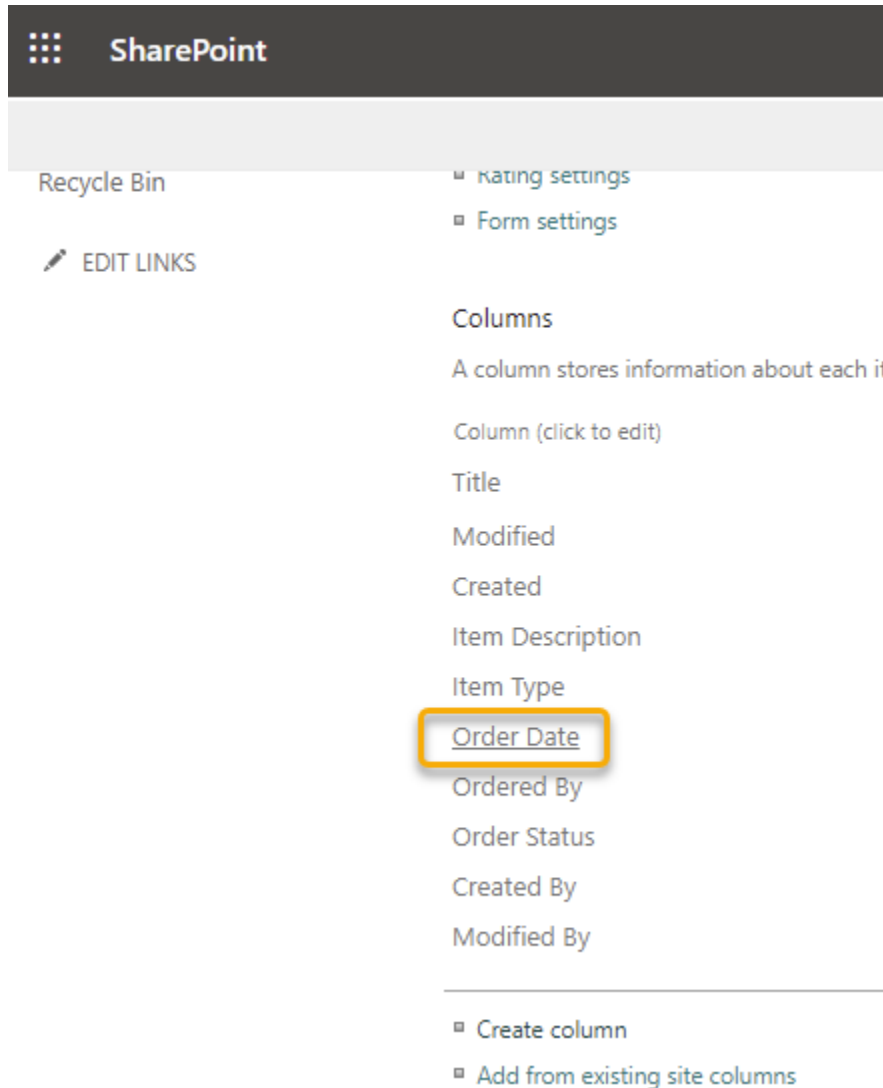
D. Expand the **Column Validation** region within the column settings page and enter `=[Order Date]>=Today()` in the **Formula** field and `The Order Date must be later than the current date.` in the **User message** field:

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:

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**:
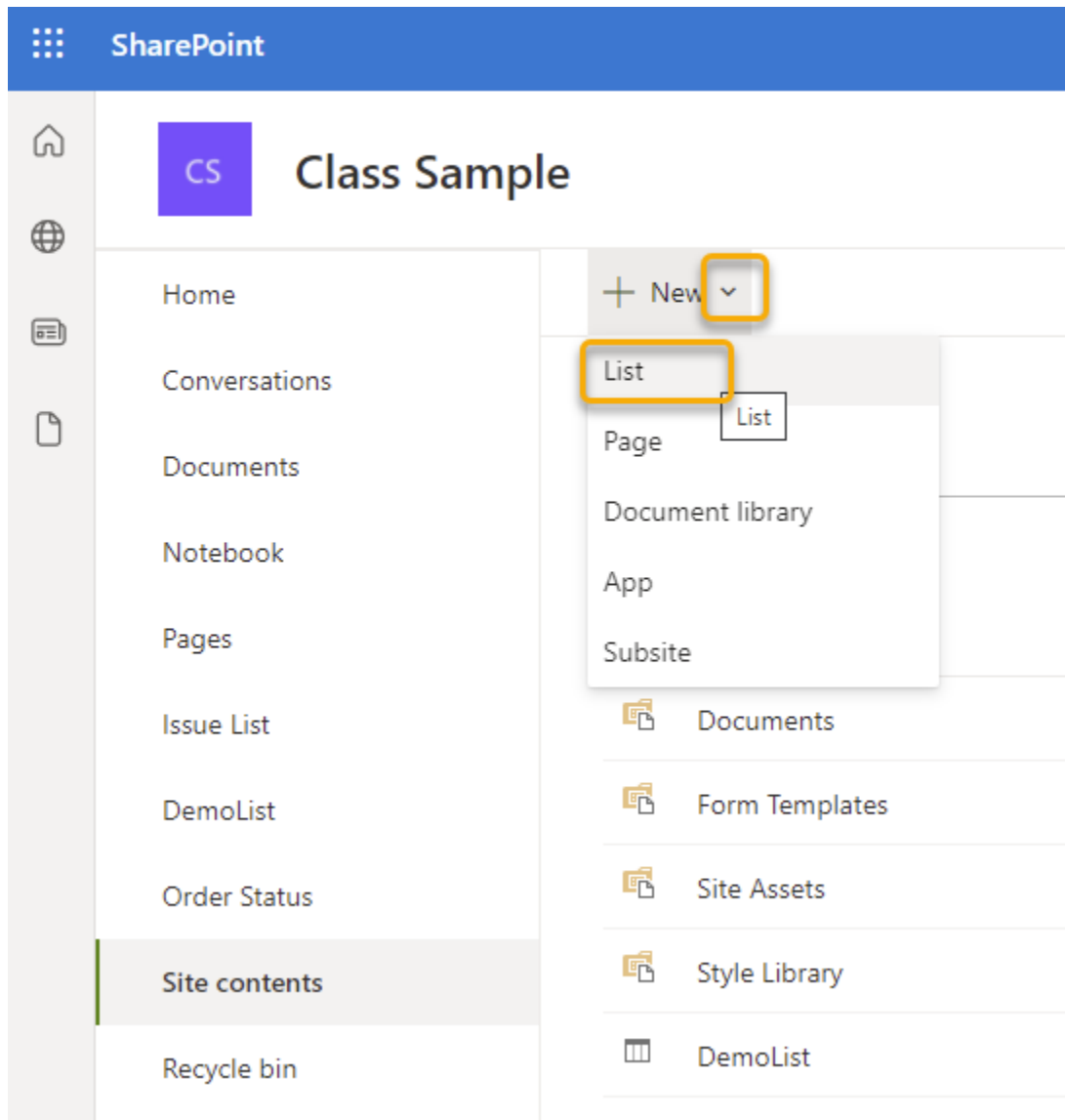
B. Scroll down the list of templates to locate and select the **Event Itinerary** template from the list of available templates.
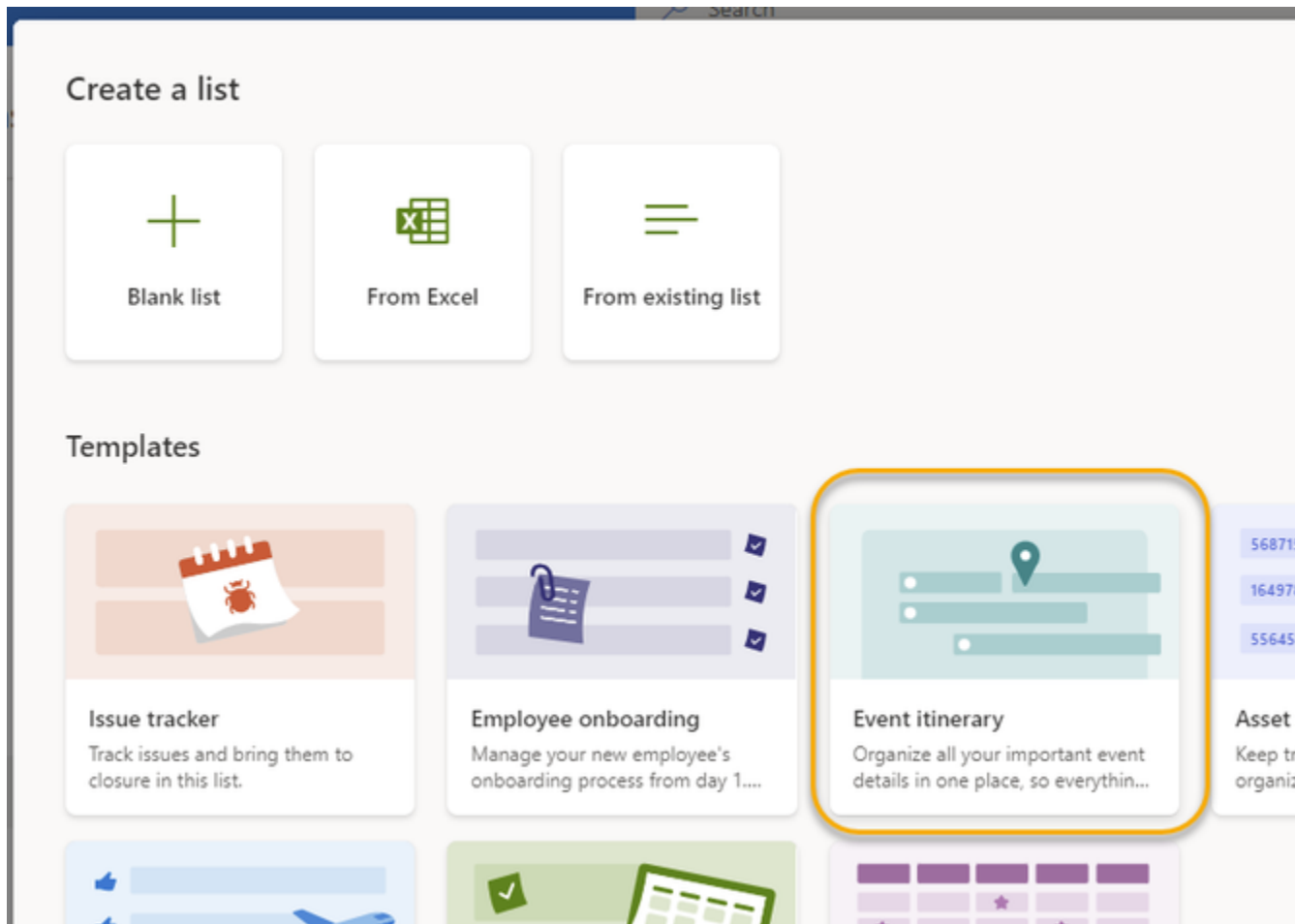
C. Review options and click the **Use Template** button.

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

2. Create an Event entry.
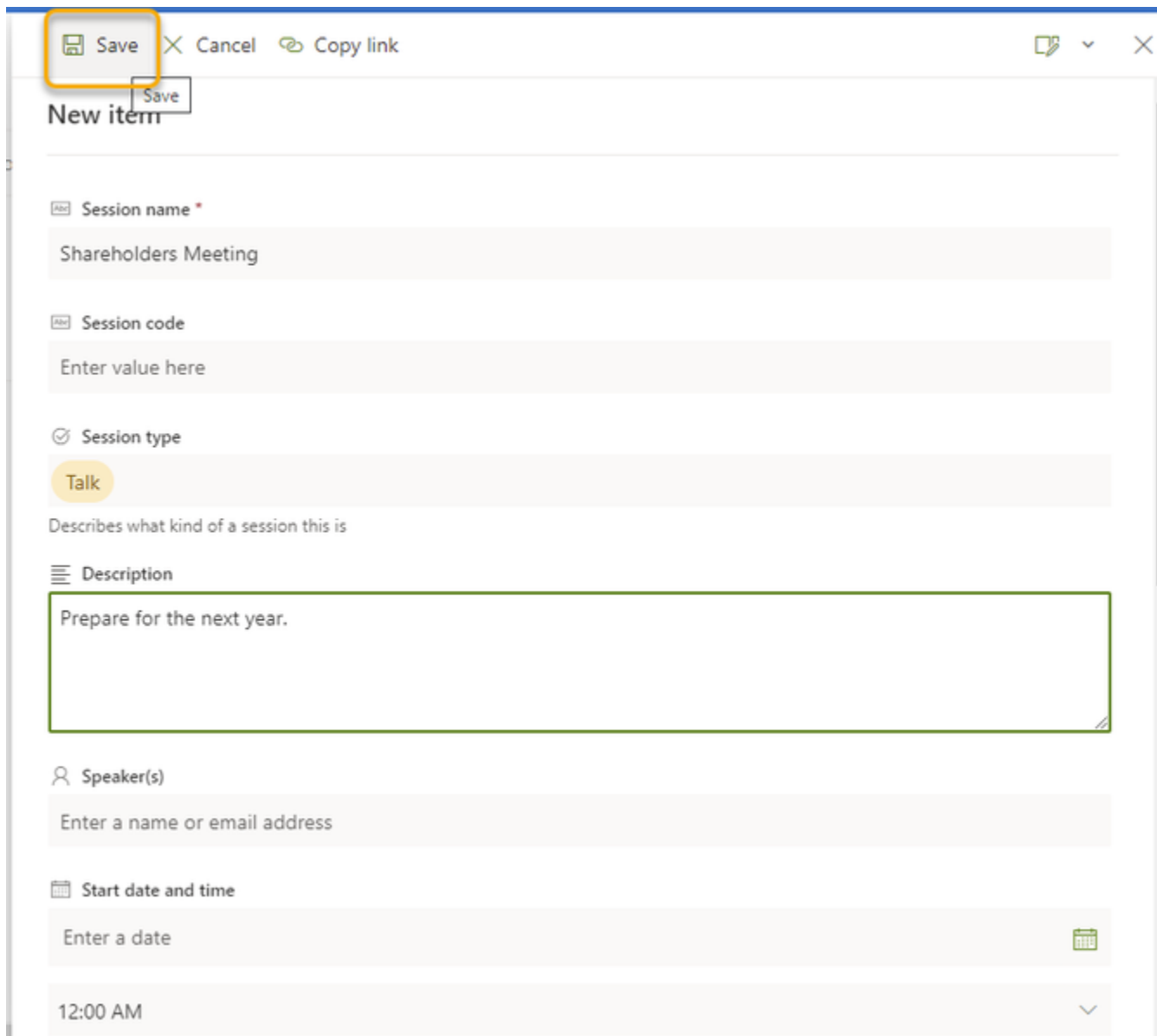
   A. Click the **Event Itinerary** link within the **Quick Launch** menu. You aare now seeing the default view for the list:
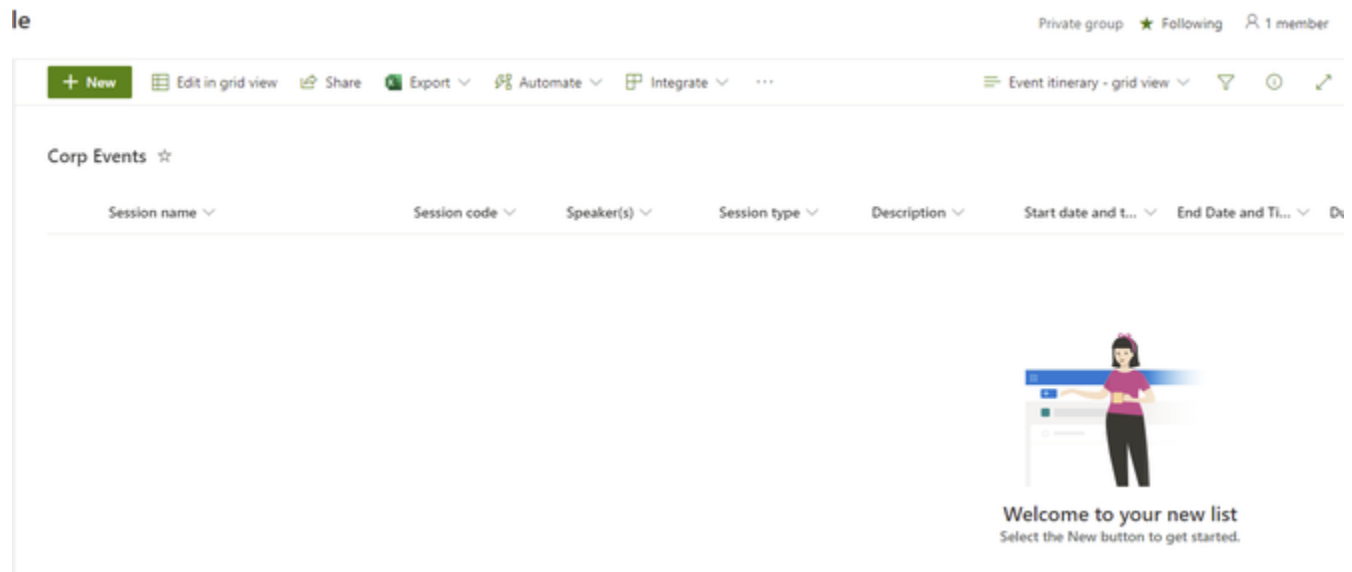
   B. Click the **New** link button in the toolbar:
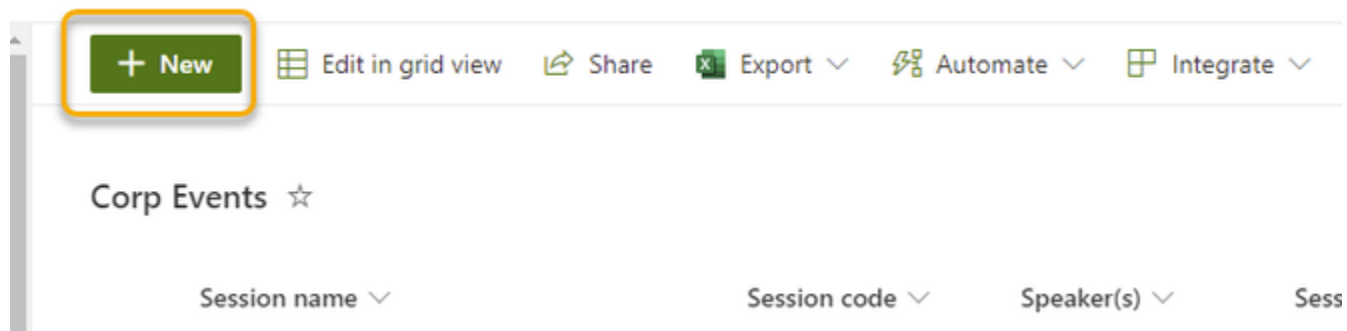
   C. Fill in the form with whatever values you like. You must enter values for the required fields as indicated by the asterisks next to their labels. When you are done click **Save**:

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**:
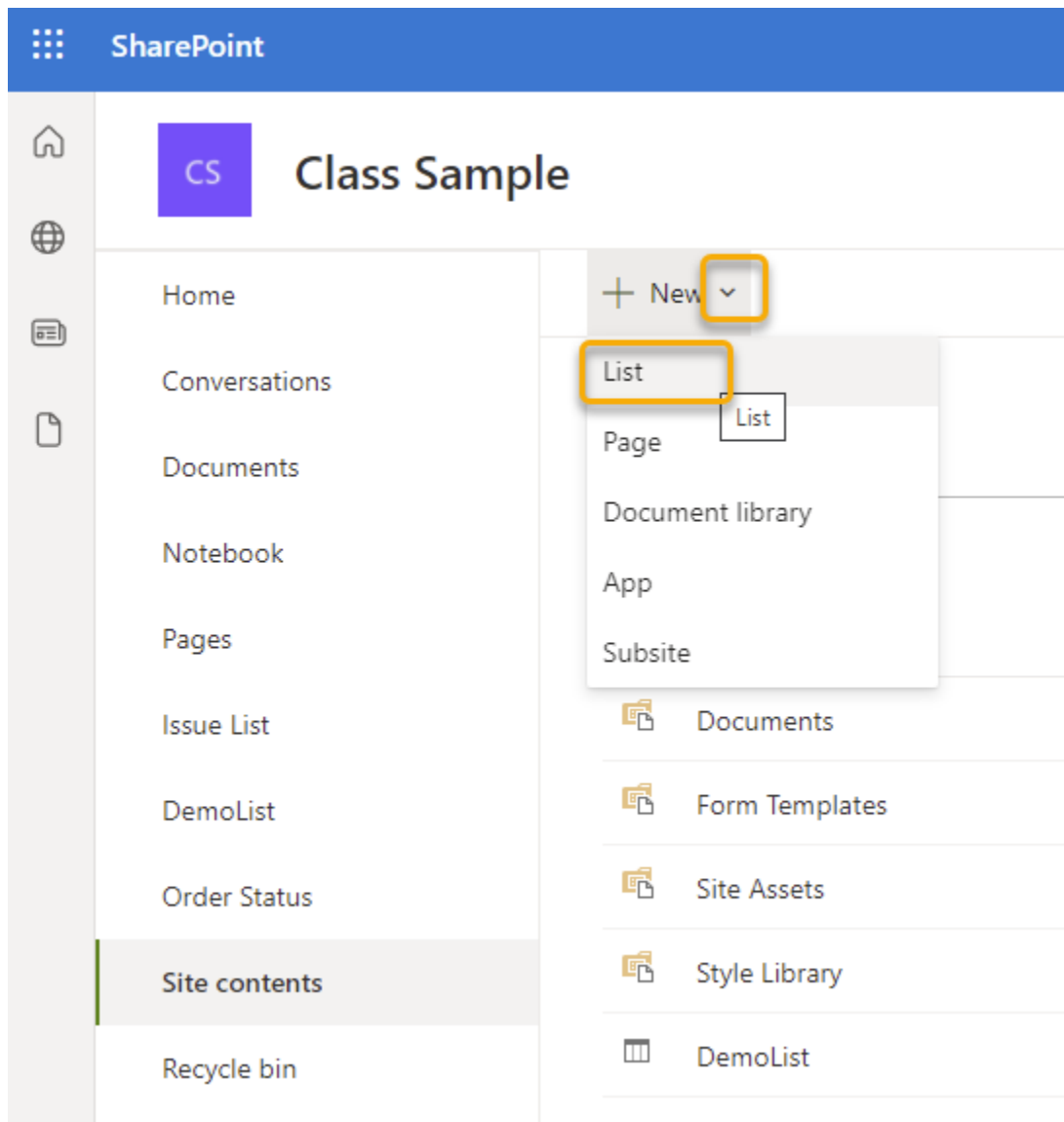
B. Select the **Blank List** template from the list of available templates.
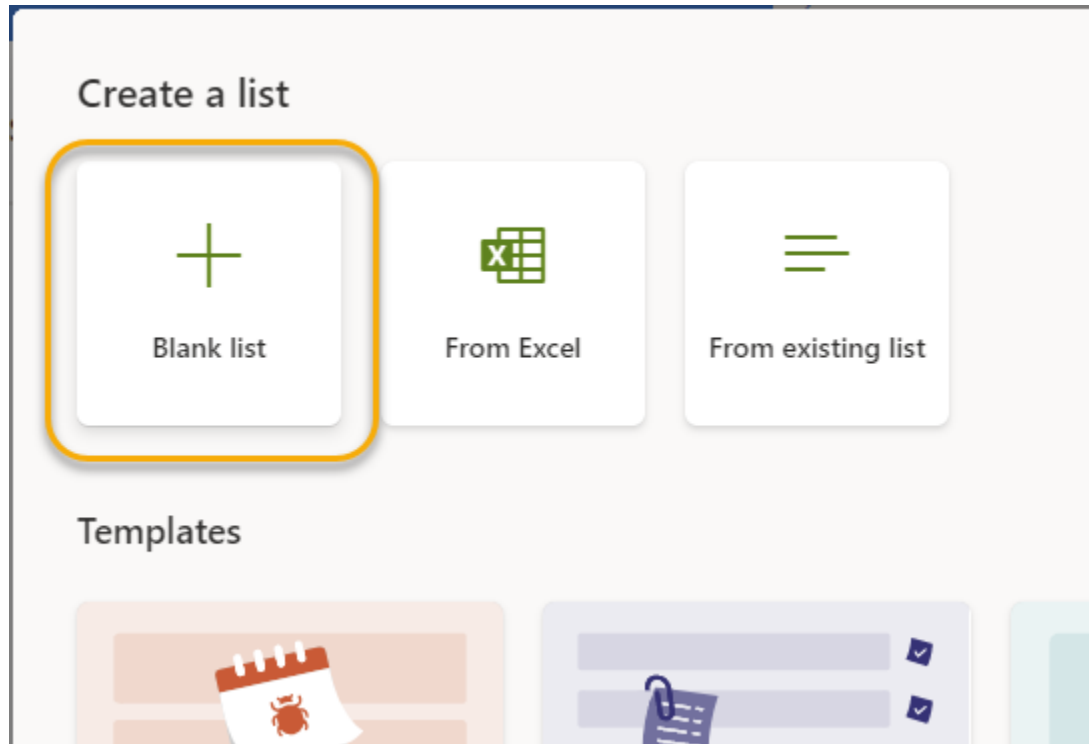
C. Enter "Office Inventory" in the **Name** field and then click the **Create** button.

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	Required
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:

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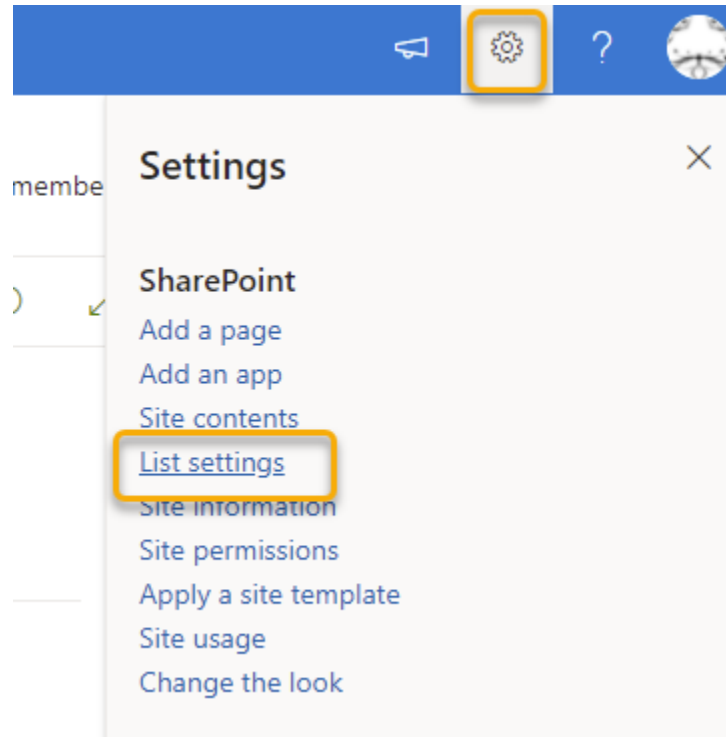
C. Take a moment to read through the list settings page. This page offers links to various list administration task links grouped by category. The group we are going to be working with is **Columns**:

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.

ry

Additional Column Settings

Specify detailed options for the type of information you selected.

Column name:

Item Name

The type of information in this column is:

Single line of text

Description:

Require that this column contains information:

◉ Yes   ○ No

Enforce unique values:

○ Yes   ◉ No

Maximum number of characters:

255

Default value:

◉ Text   ○ Calculated Value

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:
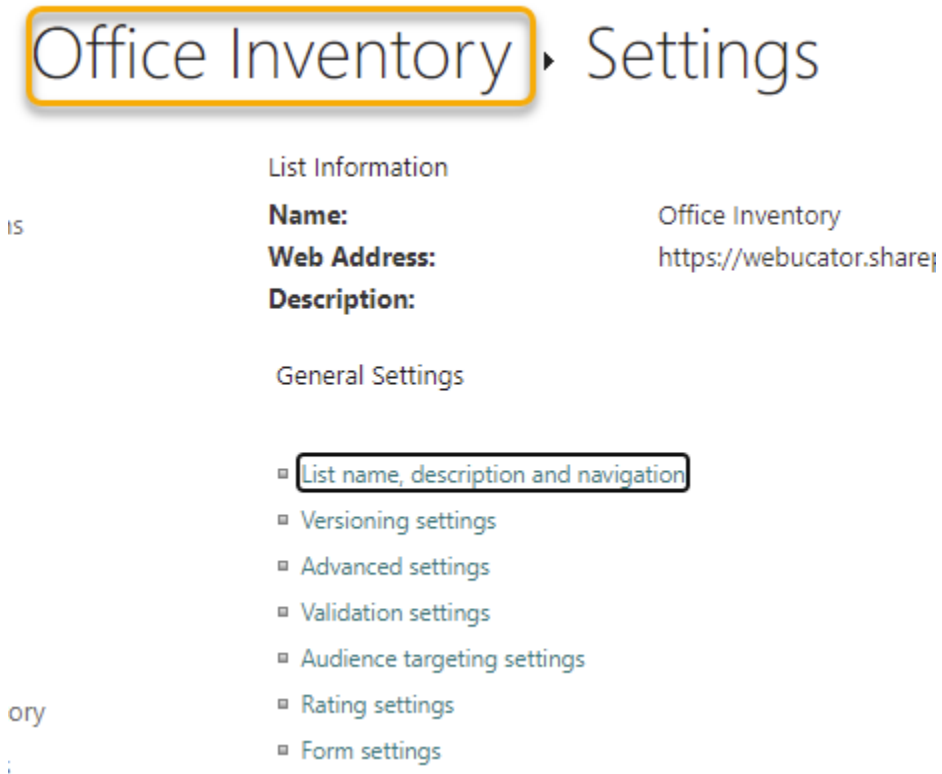
4. Add some new items to the custom list.

A. Click the **New** button:
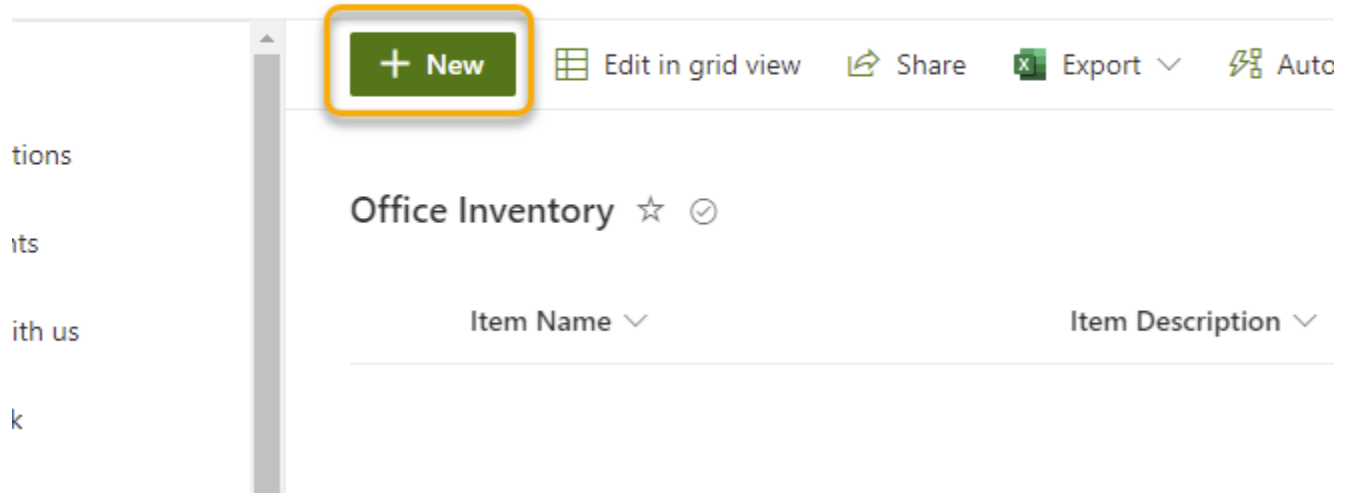
B. The **Office Inventory** new item dialog form will open with fields for the custom columns you added earlier:

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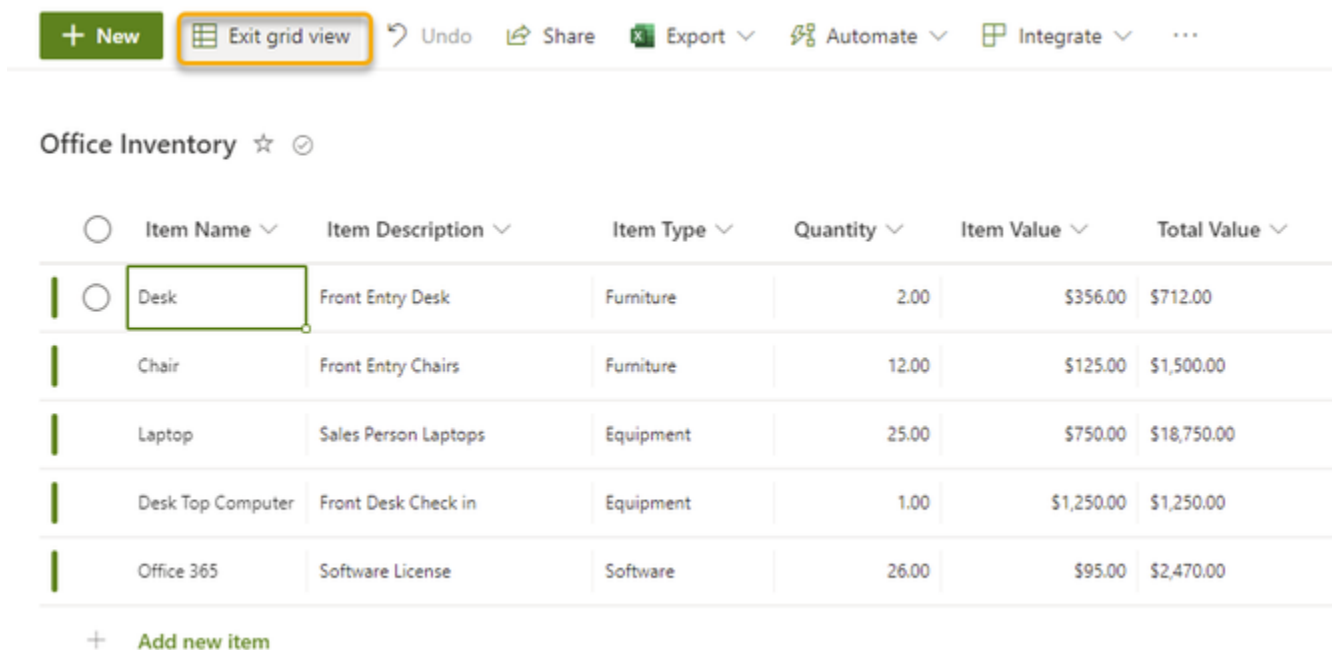
Item Name	Item Description	Item Type	Quantity	Item Value
Desk	Front Entry Desk	Furniture	2	$356

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:

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 a an earlier version.

Introduction

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

✳

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**:

CS Class Sample

Home	+ New ˅
Conversations	List
Documents	Page
Notebook	**Document library**
Pages	App
Issue List	Subsite
DemoList	
Order Status	
Corp Events	
Office Inventory	
Site contents	

Document library

	Documents	D
	Form Templates	D
	Site Assets	D
	Style Library	D
	Corp Events	Li
	DemoList	Li
	Issue List	Li

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.

Naming Conventions

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

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

A. Click the **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**:
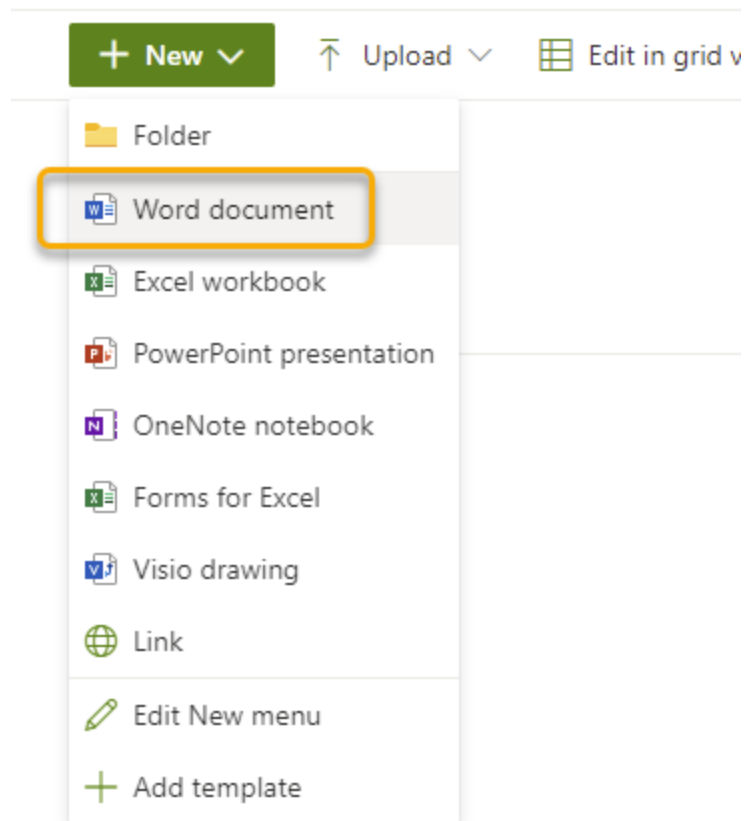
4. A new file will open in Word Online. Type the following text in the new blank Microsoft Word document: "This document is for a demonstration on SharePoint document libraries."

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:

$+$ New ∨

	Contents	Subsites

	Name		Type	Items
▦	Documents		Document library	0
▦	Form Templates		Document library	0
▦	MyDocs	⋮	Document library	1
▦	Site Assets		Document library	2
▦	Style Library		Document library	0

MyDocs
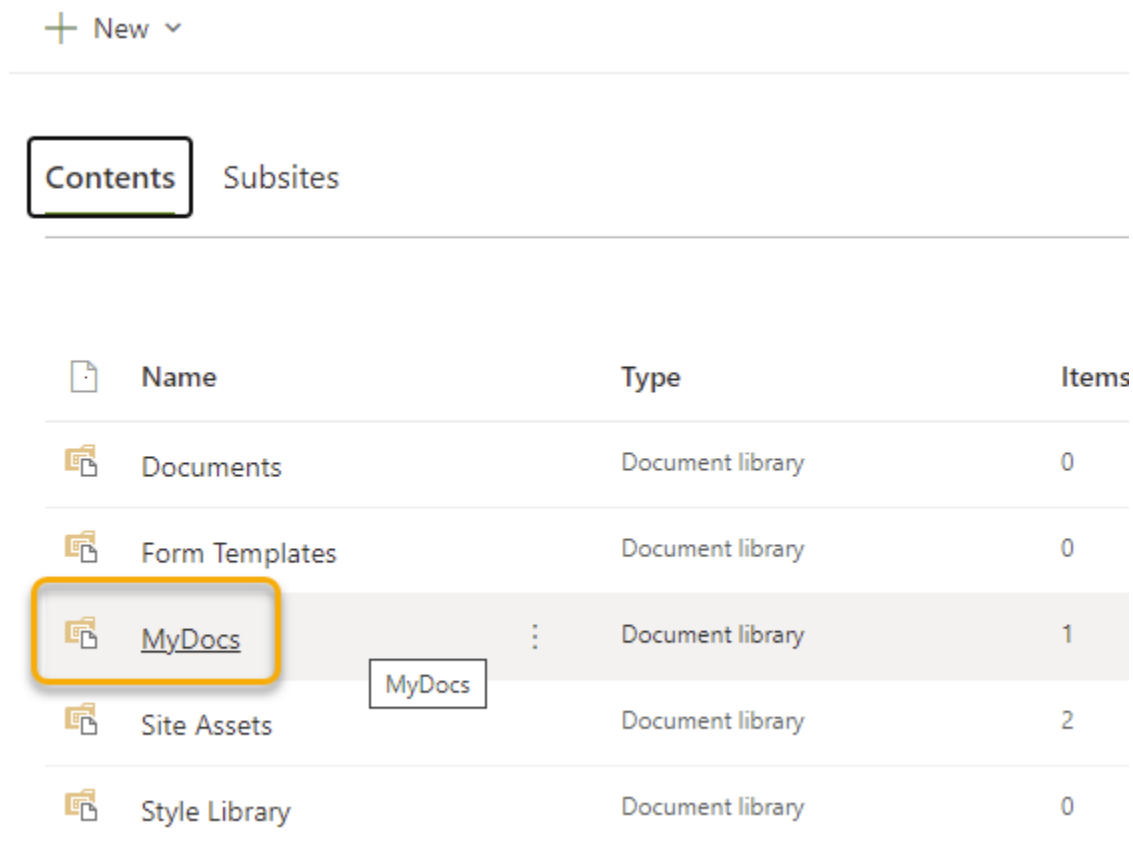
B. Click the ellipsis button next to the title of the item and then click **More > Check Out**. NOTE: This may be under a category named Advanced instead of More if your settings are different than this sample:
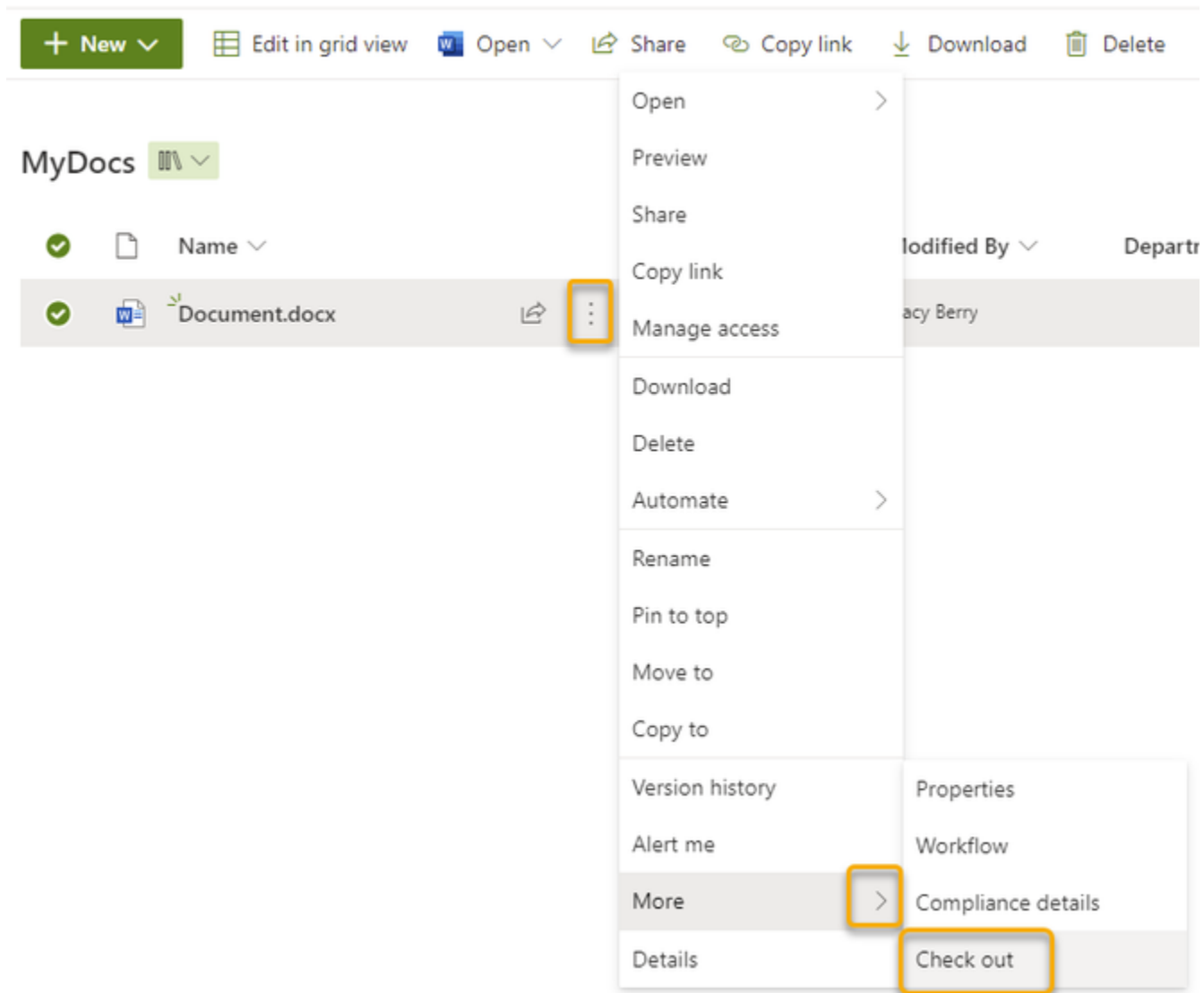
C. Note the icon that appears next to the document in the document library that indicates the file is checked out:
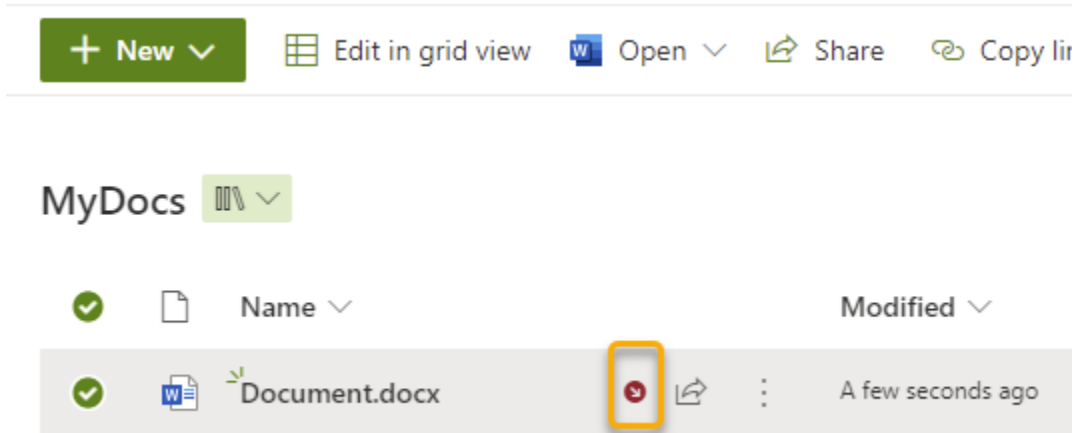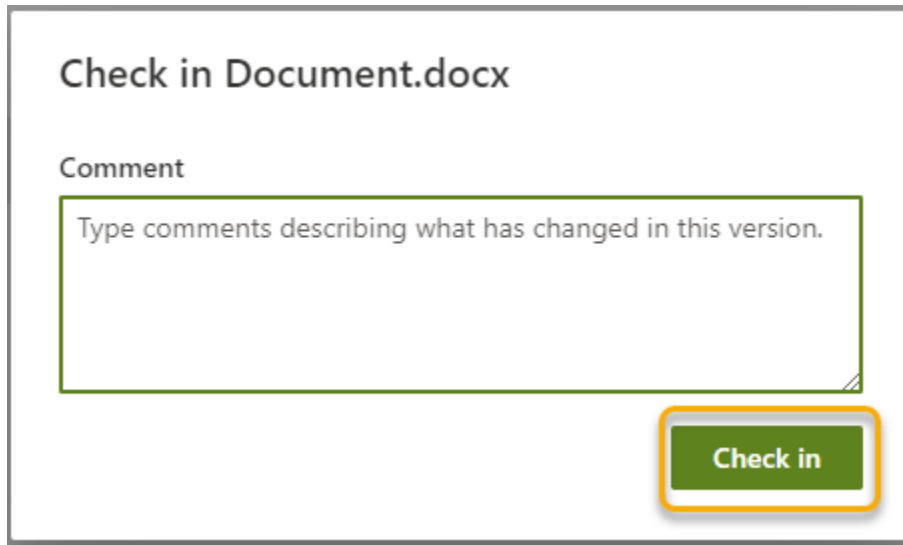
2. Check the file back in to **My Docs** library.

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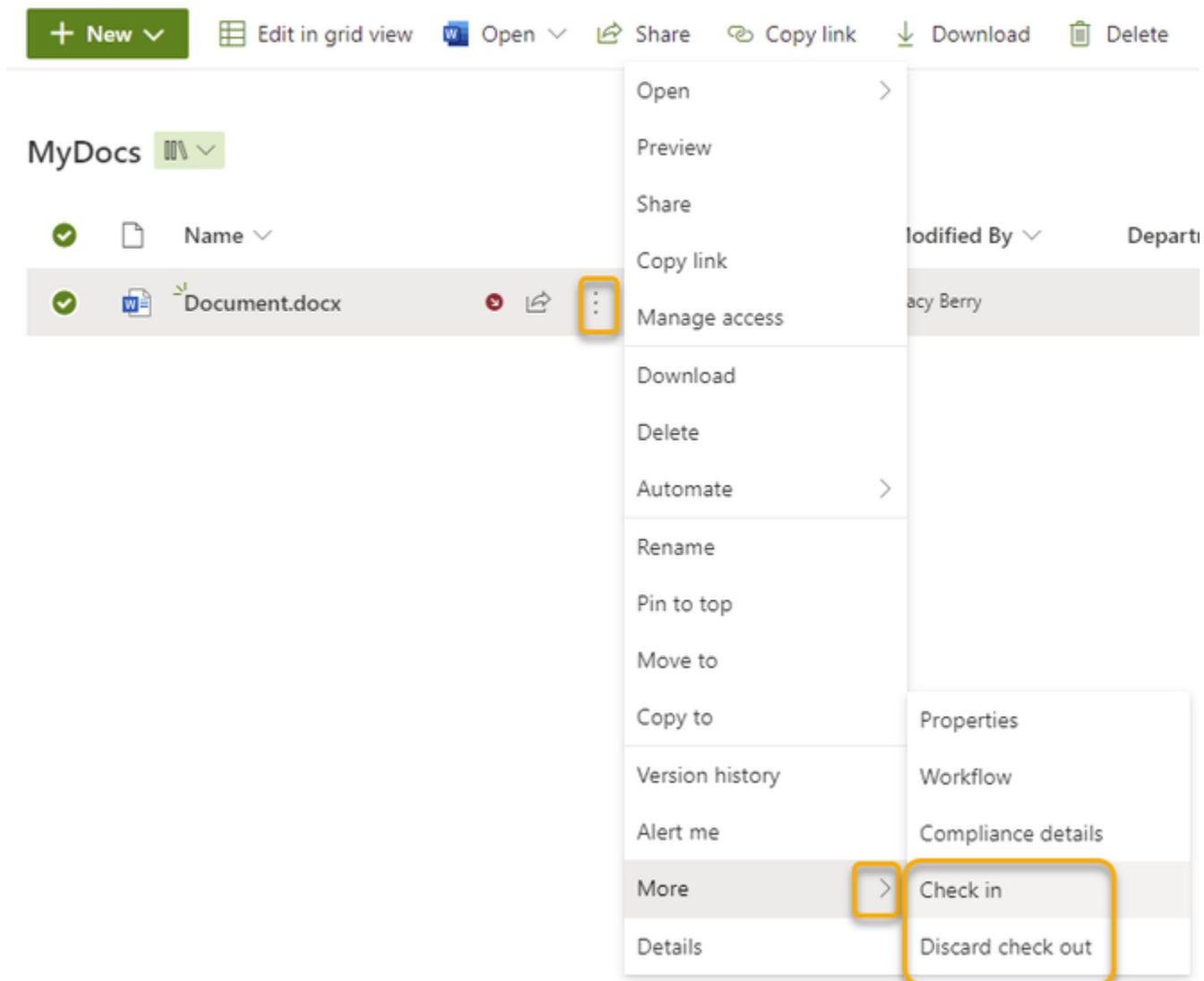
Discard Check Out
The **Discard Check Out** option will remove the checked-out setting from the document, but you will also lose any changes that where made since the document was checked out.

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

D. In the **Check In** dialog form, click the **OK** button to complete the 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:

B.   Click the ellipsis button next to the title of the item and then click **Delete**:
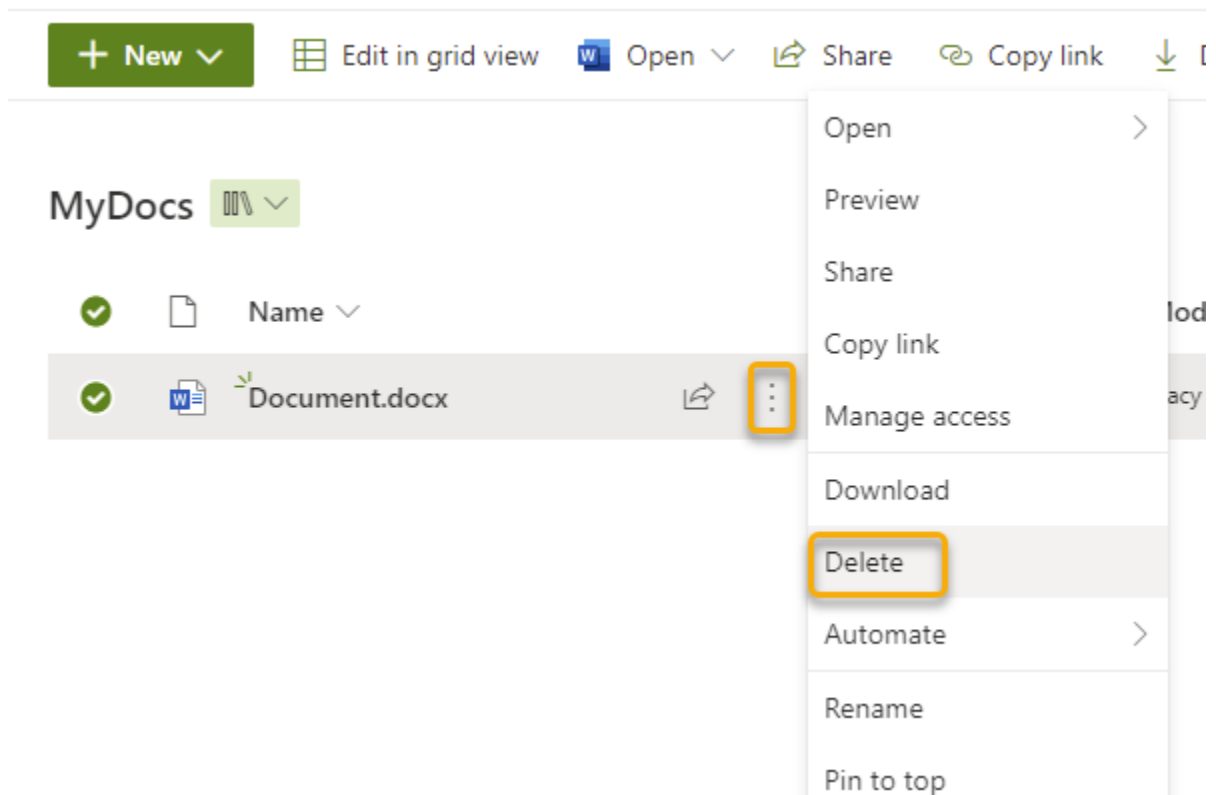
C. Click the **OK** button on the **Message from web page** dialog window asking you to verify sending the item to the recycle bin:
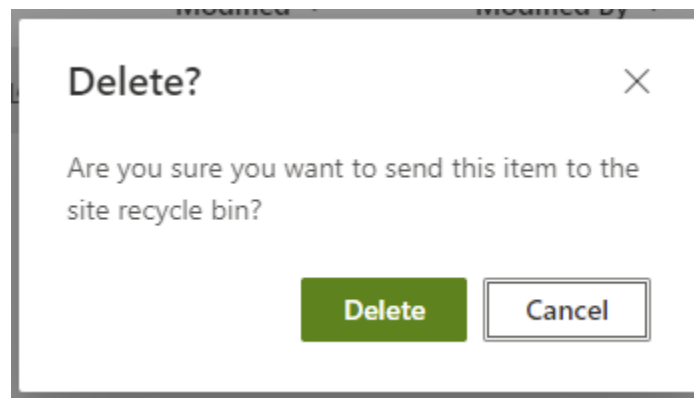
D. Verify that the **Document** has been removed from the **My Docs** library.

2. Recover the deleted **Document** from the **Recycle Bin**.

A. Click the **Recycle Bin** link at the bottom of the **Quick Launch** menu:
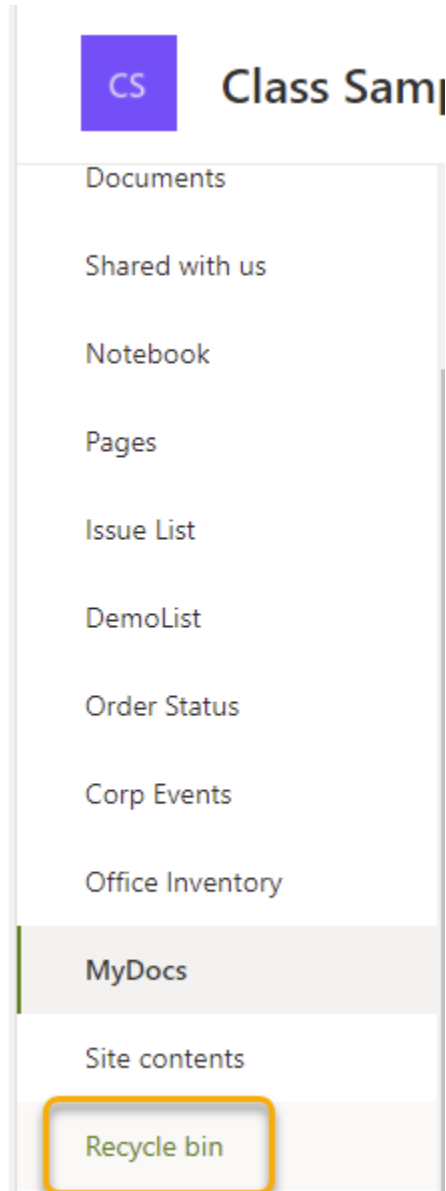
B. Click to add a check to the check box in the far left column next to the **Document** item to select it and click the **Restore** at the top of the list to restore the document. NOTE: If you use a different template you may see a different Restore icon:
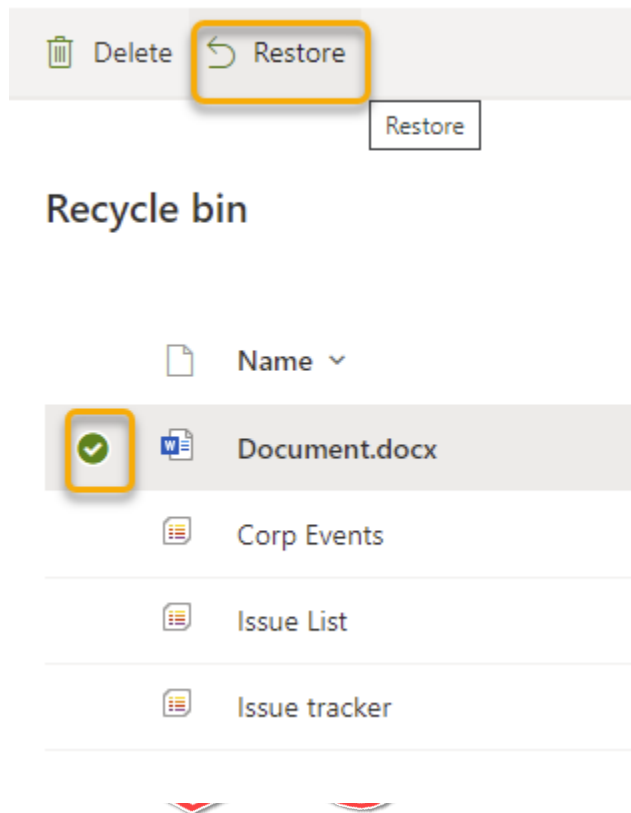
C. Verify that **Document.docx** is back in the library.

❖ 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:

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

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

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.

Require content approval for submitted items?
○ Yes ● No

Document Version History
Specify whether a version is created each time you edit a file in this document library.   Learn about versions.

Create a version each time you edit a file in this document library?
○ Create major versions
  Example: 1, 2, 3, 4
● Create major and minor (draft) versions
  Example: 1.0, 1.1, 1.2, 2.0

Keep the following number of major versions:
500

☐ Keep drafts for the following number of major versions:

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.

Who should see draft items in this document library?
● Any user who can read items
○ Only users who can edit items
○ Only users who can approve items (and the author of the item)

Require Check Out
Specify whether users must check out documents before making changes in this document library.   Learn about requiring check out.

Require documents to be checked out before they can be edited?
● Yes ○ No

OK   Cancel

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:
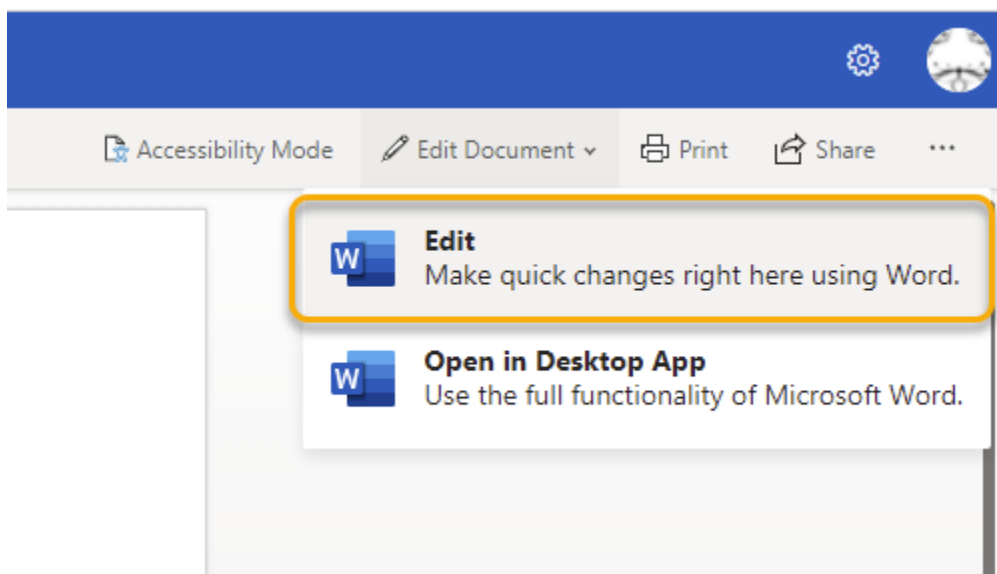
B. Add a new line to the document in Microsoft Word and type the following: "This line was added to test versioning."
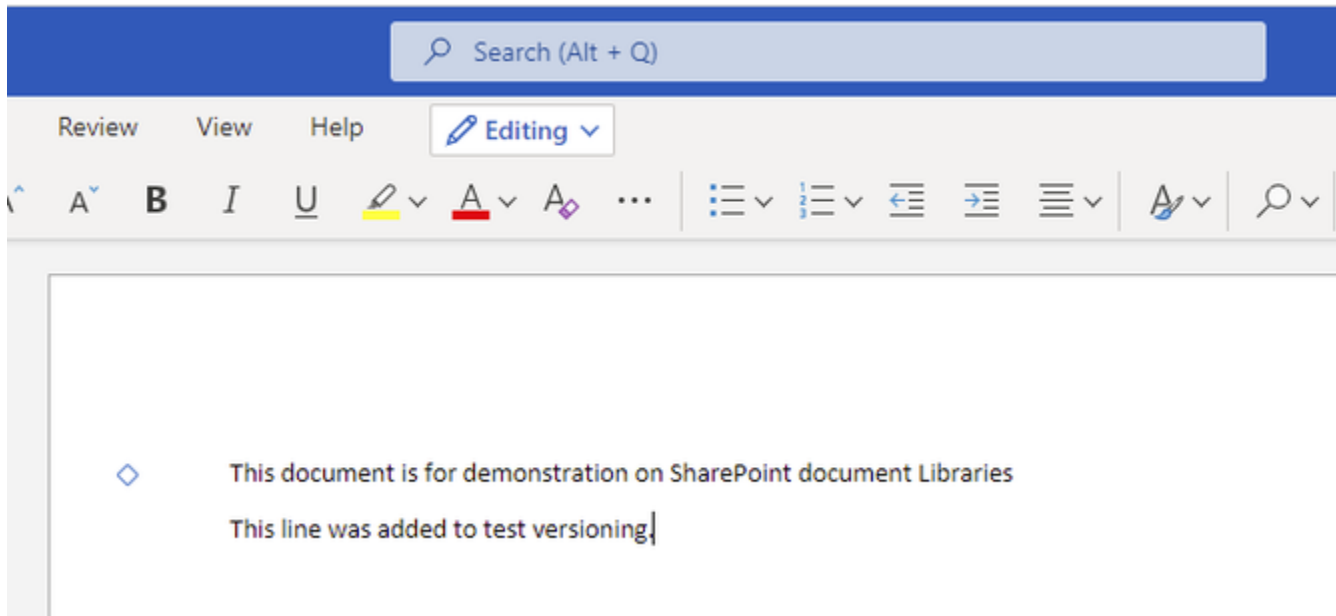
C. The file **Saved** automatically.

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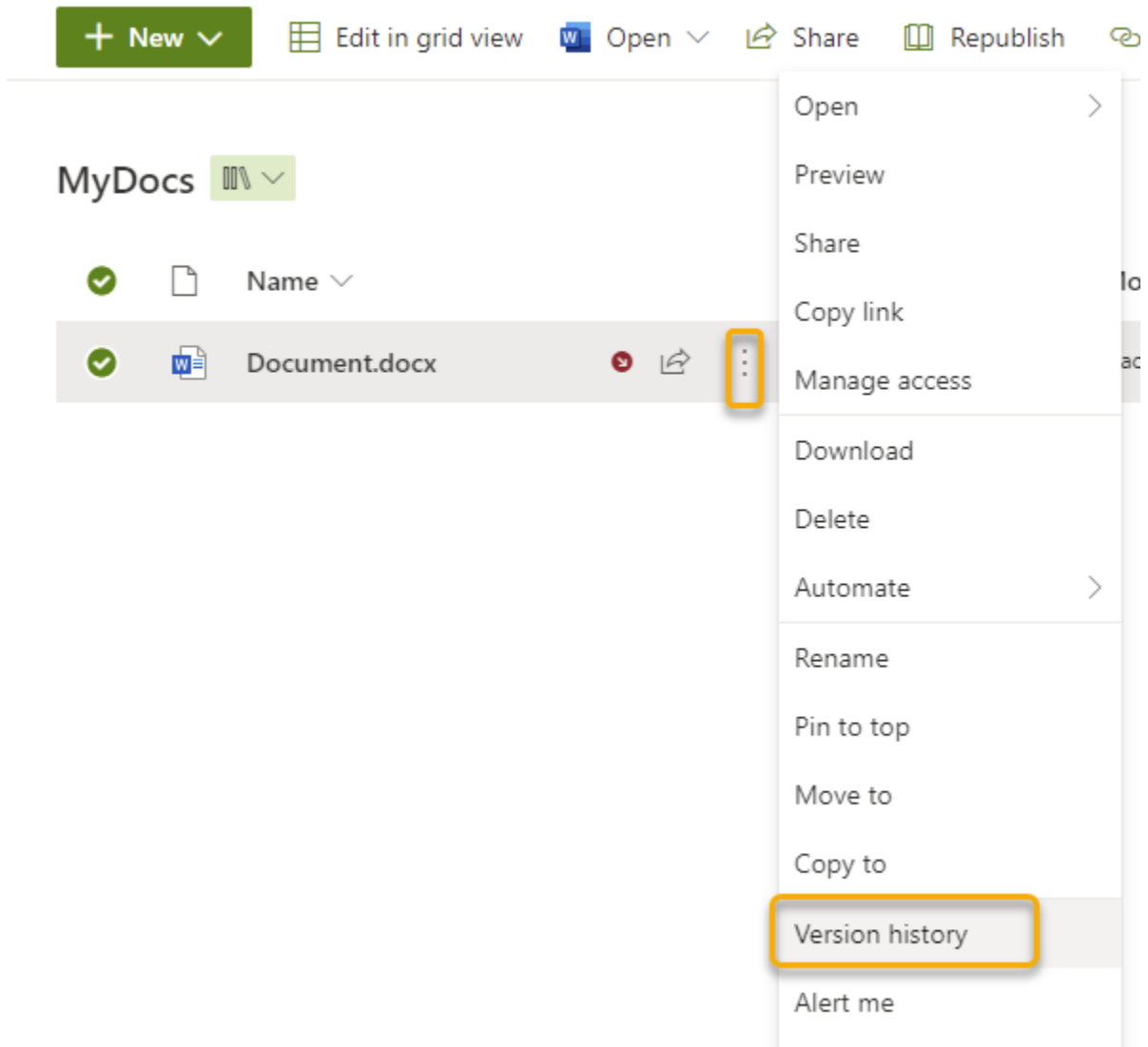
B. Since both major and minor version was enabled, you see both draft and major versions. Users with **Visitor** permissions would only be able to see published major versions:

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

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

webucator.sharepoint.com says

You are about to replace the current version with the selected version.

OK   Cancel
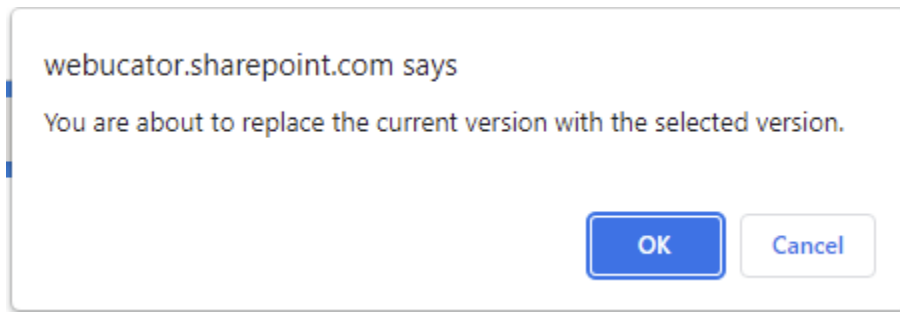
E. Close the **Version History** dialog:

Version history

[Delete All Versions] | Delete Minor Versions

No. ↓	Modified	Modified By	Size	Comments
4.1	3/28/2022 10:57 AM	☐ Tracy Berry	18.8 KB	
This is the current published major version				
4.0	3/28/2022 9:26 AM	☐ Tracy Berry	18.8 KB	
3.0	3/28/2022 9:21 AM	☐ Tracy Berry	18.8 KB	
2.0	3/28/2022 9:15 AM	☐ Tracy Berry	16.9 KB	
1.0	3/28/2022 9:14 AM	☐ Tracy Berry	16.9 KB	
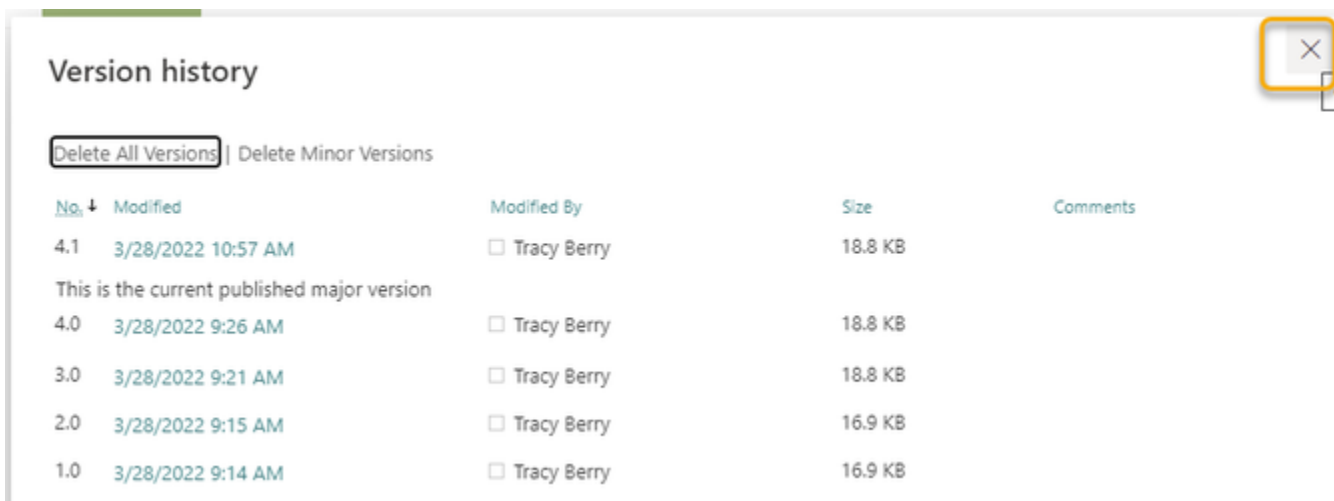
F. Click the **Document** link in the **My Docs** library to open the file in Microsoft Word Online.

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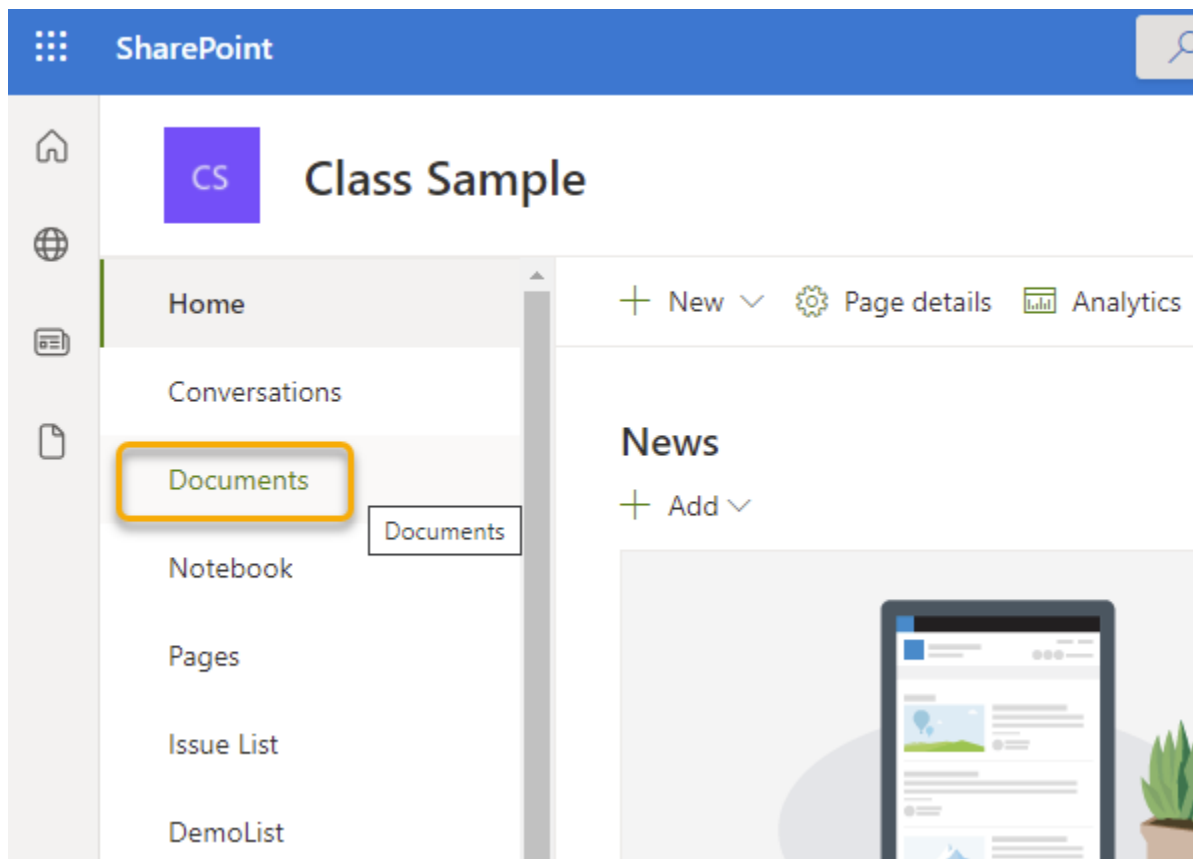
   This should take you to the default view of the library.

   B. Click **Upload > Files** to add an existing file:
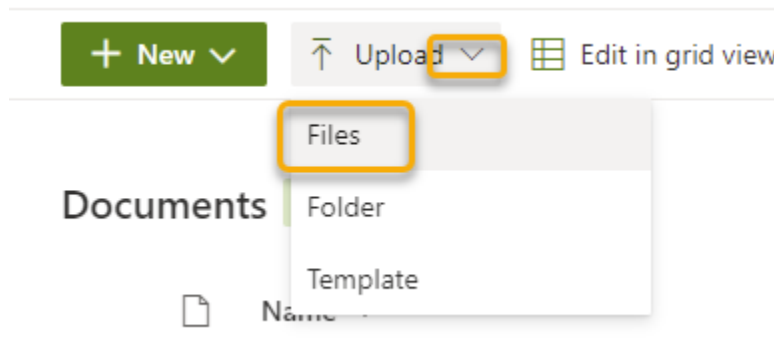
C. Choose the file and click the **Open...** button to upload the file.

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

A. Click the **New** button and choose the type of file:
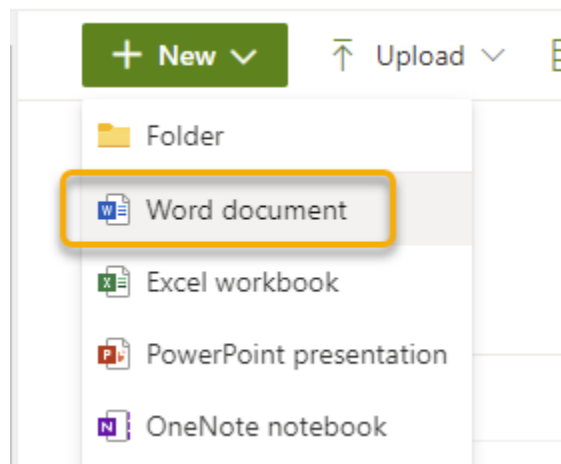
B. Microsoft Word Online should open to a blank page. Enter the following text into the document: "SharePoint 365 is a great collaboration product." The page will save automatically.

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**:
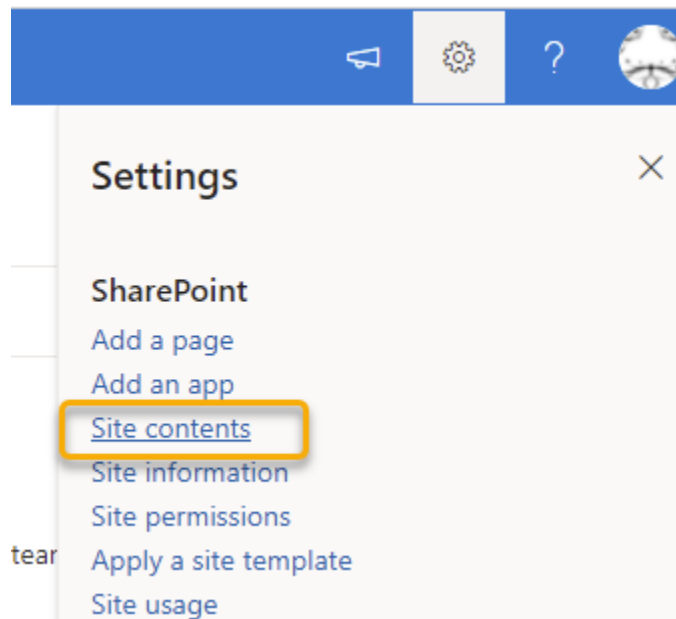
    B. In the **New** form that opens enter "Expense Report" in the **Name** field and click **Create**:

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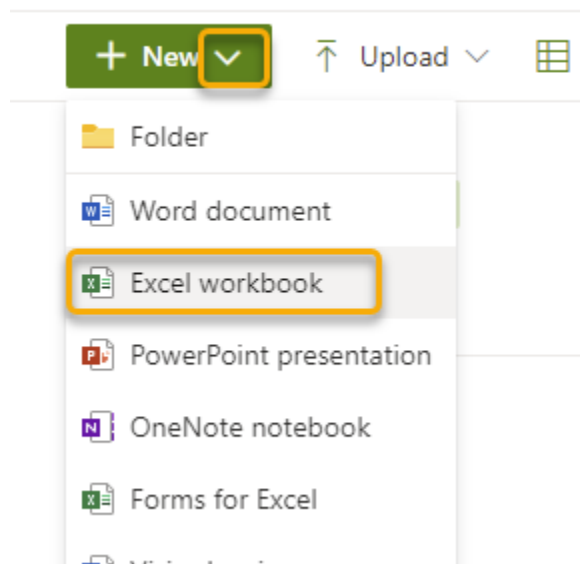
B. Microsoft Excel should open to a blank spreadsheet based on the **Microsoft Excel spreadsheet** template you chose when creating the **Expense Reports** library.

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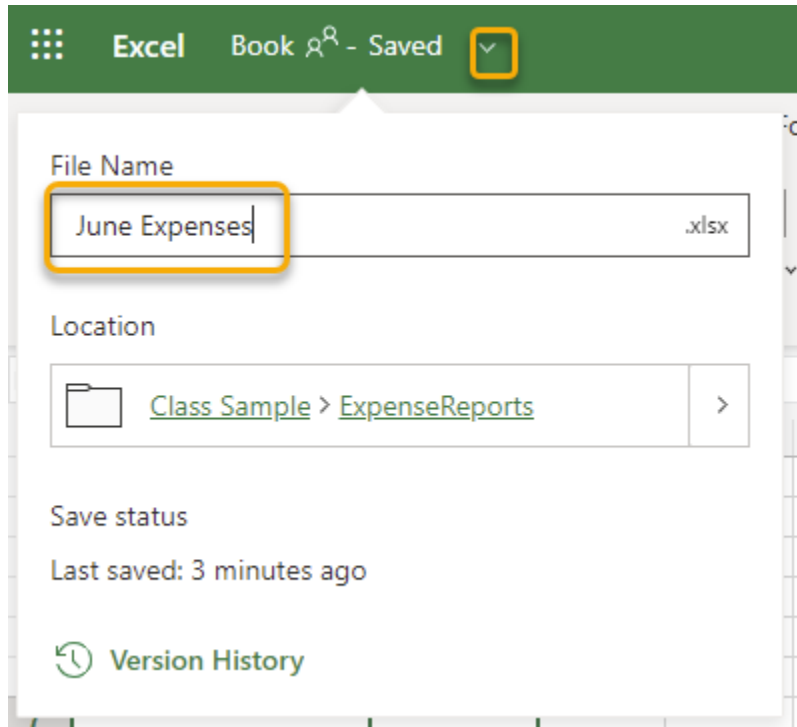
F. Close the Microsoft Excel window. You should see your new document listed in the library, if you don't click the **Expense Reports** link in the **Quick Launch** menu to refresh the page.

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

Field	Data
Session Name:	Client Review
Sessoin 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

Field	Data
Session Name:	New Hire Onboarding
Sessoin 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

▦ All Items   ⌄   ▼   ↗

    ✓   ▦ Fixed height

     ▦ Autofit height

    ✓   All Items

     Event itinerary - grid view

     Event itinerary - list view

     Grouped by session type

     Create new view

     Save view as

     Set current view as default

     Edit current view

     Format current view
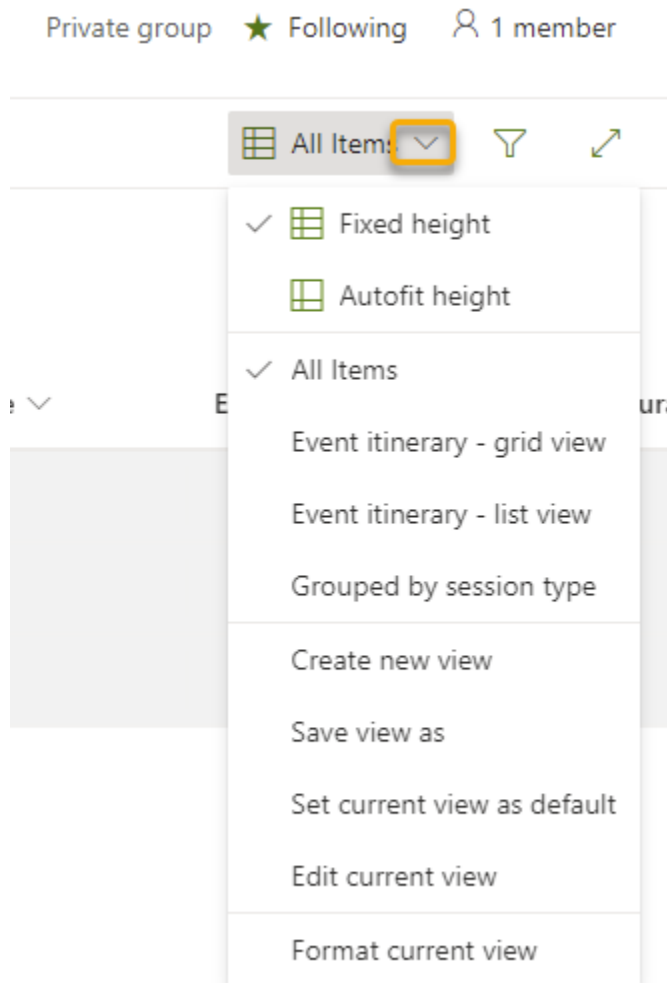
Security-Trimmed Views

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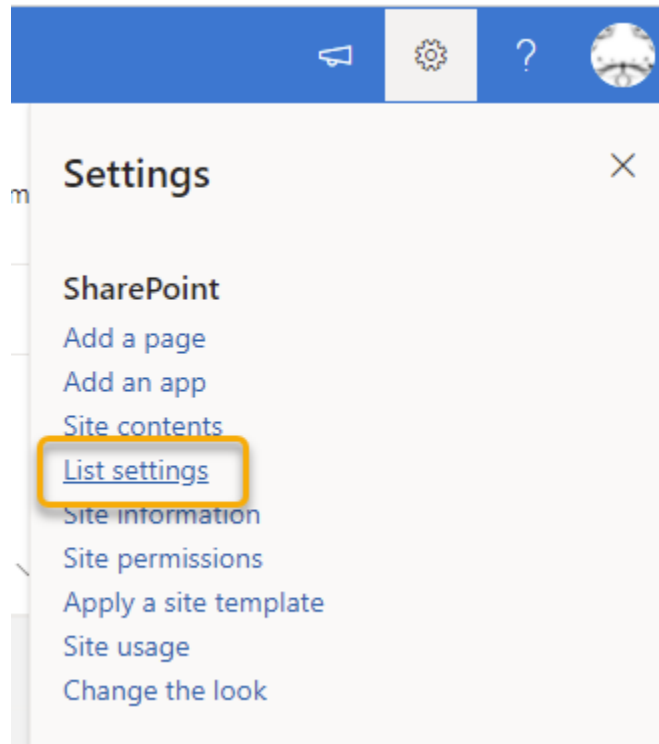
B. Scroll down the **List Settings** page and note the **Views** region:

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 configure 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:

EDIT LINKS

Settings › Edit View ⓘ

OK   Cancel

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 Events/ [AllItems] .aspx

This view appears by default when visitors follow a link to this list. If you want to delete this view, first make another view the 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	Column Name	Position from Left
☑	Session name (linked to item with edit menu)	1 ⌄
☑	Session code	2 ⌄
☑	Speaker(s)	3 ⌄

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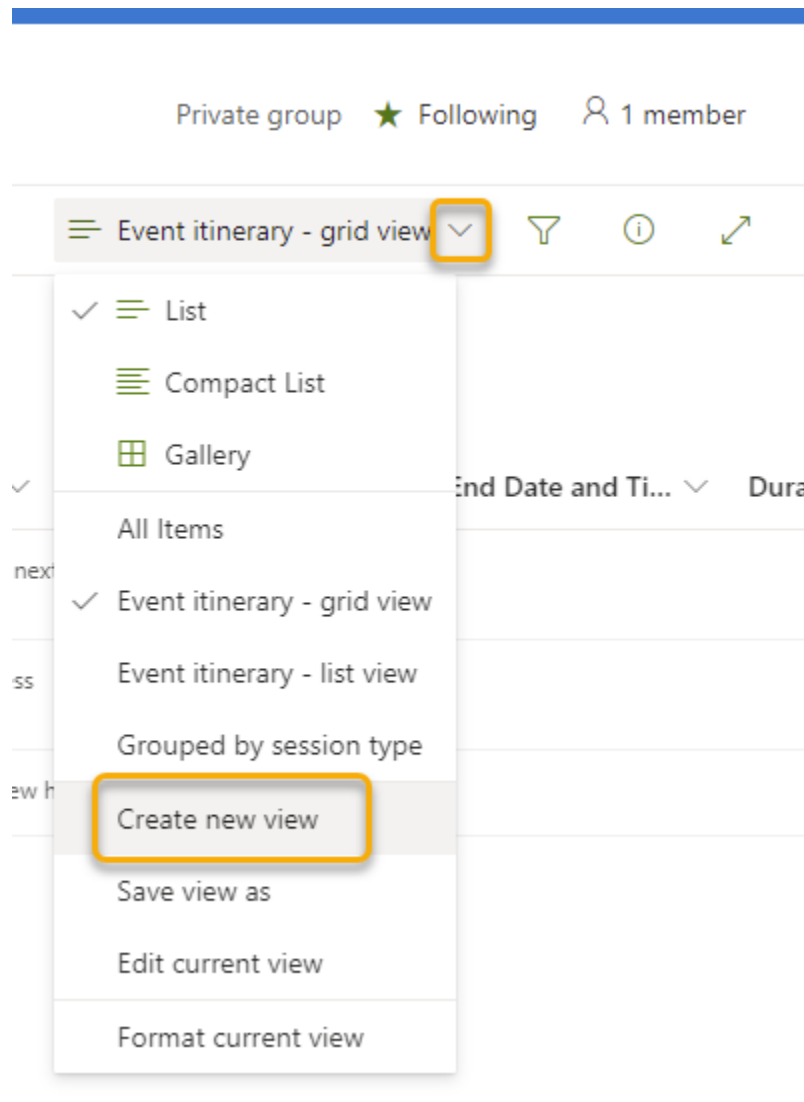
C. Click **List** from the show as region. Name the view "Class Test" and click **Create**:

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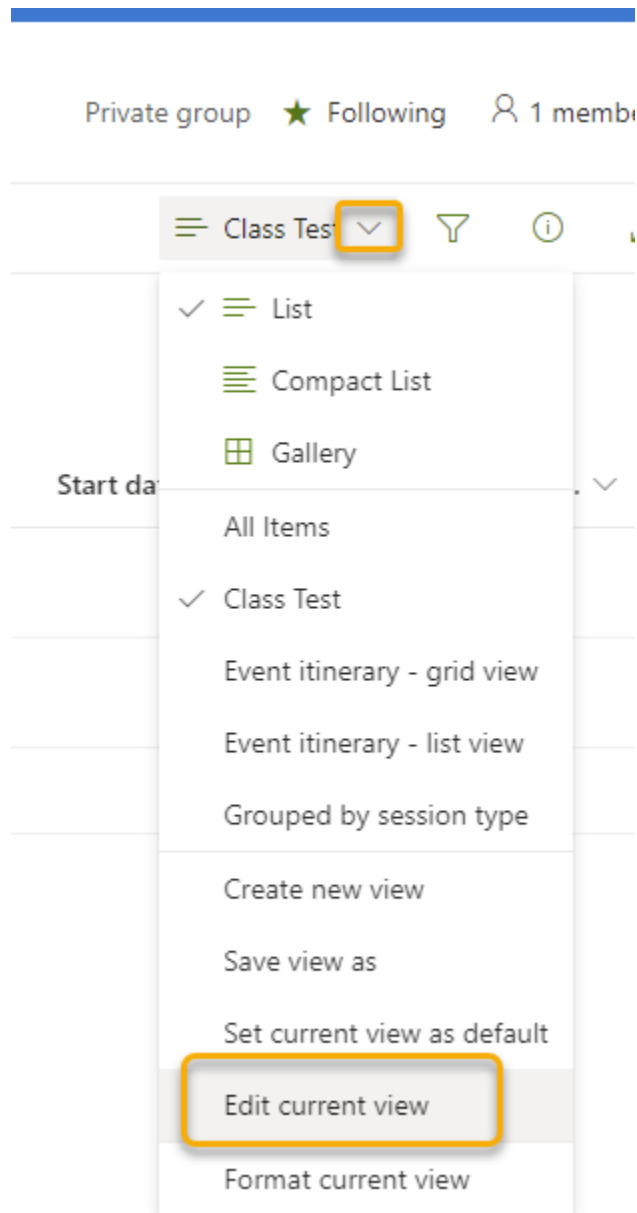
F. Select the following from the **Columns** region; everything else should be deselected.

- Session Name (linked to item with edit menu)
- Session Type
- Description

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

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 items in this view
- ● Show items only when the following is true:

  Show the items when column

  Session type ▼

  is equal to ▼

  Talk

  ○ And ● Or

  When column

  None ▼

  is equal to ▼

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

Show More Columns...

⊞ Tabular View

⊞ Group By

⊞ Totals

⊞ Style

⊞ Folders

⊞ Item Limit

⊞ Mobile

Delete   OK   Cancel

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:

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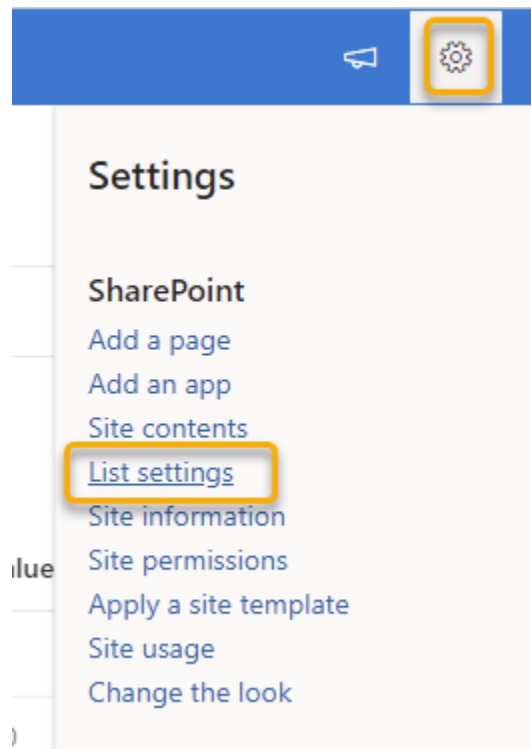
   C. Click the **Create view** link:

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

s

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 that is
convenient for bulk editing and quick customization.

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

Gantt View
View list items in a Gantt chart to see a graphical
representation of how a team's tasks relate over
time.

Start from an existing view

☐ All Items

ᵒry

E. Enter "Company Furniture" in the **View Name** field and leave the **View Audience** field set to **Create a Public View**:

Settings ‣ Create View ⓘ

OK   Cancel

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:

Company Furniture

☐ 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 only.

ry

ts

◉ Create a Public View
Public views can be visited by anyone using the site.

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
☑	Item Name (linked to item with edit menu)	1 ⌄
☐	Item Description	2 ⌄
☑	Item Type	3 ⌄
☐	Quantity	4 ⌄
☐	Item Value	5 ⌄
☑	Total Value	6 ⌄
☐	App Created By	7 ⌄
☐	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

○ And   ● 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:

| 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)

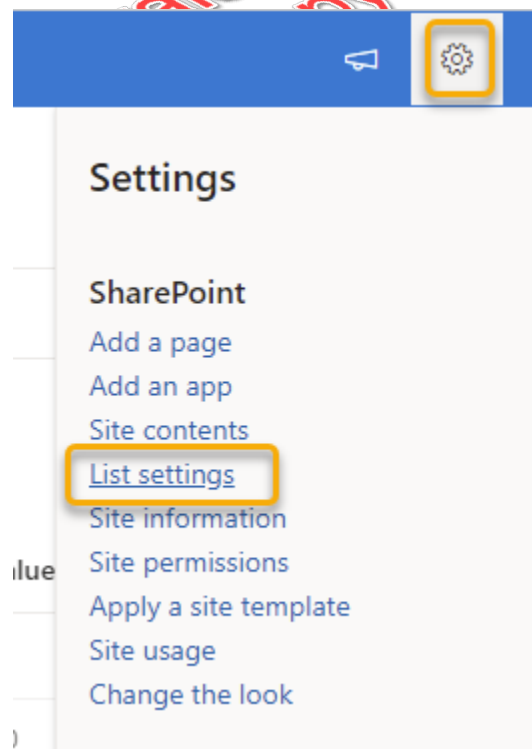By default, show groupings:
◉ Collapsed ◯ Expanded
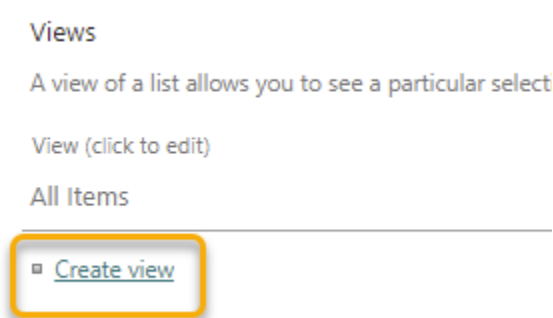
Number of groups to display per page:

| 30 |

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.
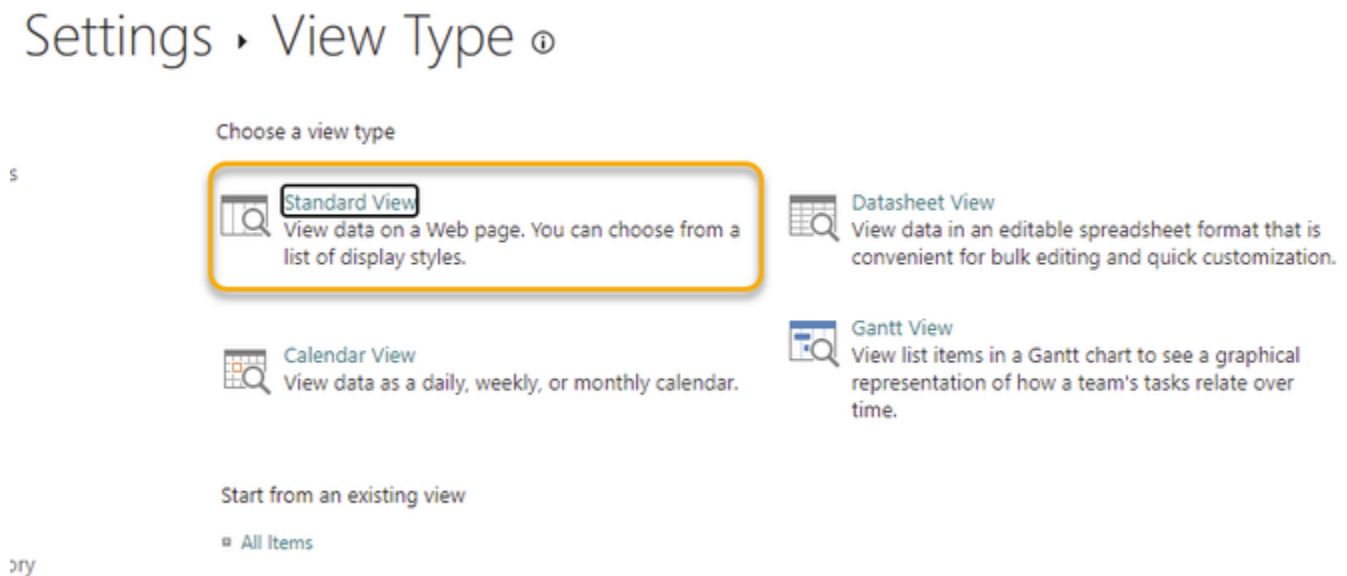
K.   Note how the new view looks:

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:

Views

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

View (click to edit)

All Items

□ Create view

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

Settings › View Type ⓘ

s

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 that is
convenient for bulk editing and quick customization.

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

Gantt View
View list items in a Gantt chart to see a graphical
representation of how a team's tasks relate over
time.

Start from an existing view

□ All Items

ory

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 ⓘ

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 only.

○ Create a Public View
Public views can be visited by anyone using the site.

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:

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.