

# SharePoint for Office 365 Site Owner Training



with examples and  
hands-on exercises

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**WEBUCATOR**

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**Version:** 2.0.0

### **Class Files**

Download the class files used in this manual at

<https://static.webucator.com/media/public/materials/classfiles/SHP365.6-2.0.0.zip>.

### **Errata**

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

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# LESSON 1

## Working with Sites

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### 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.



## 1.1. 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.

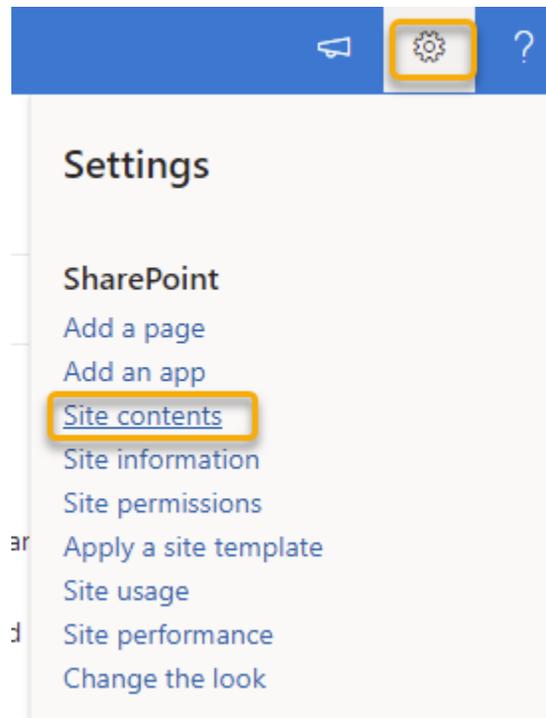


## 1.2. Creating Sites

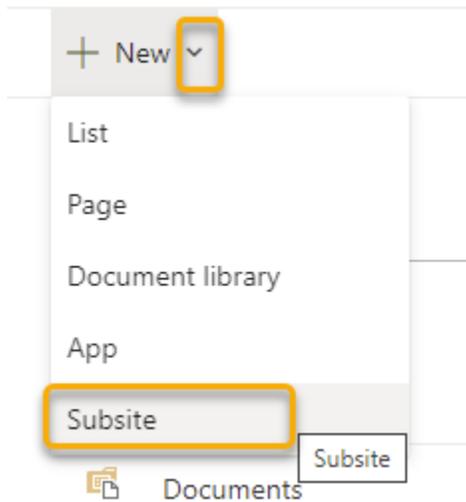
### ❖ 1.2.1. Creating a Team Site

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

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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

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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

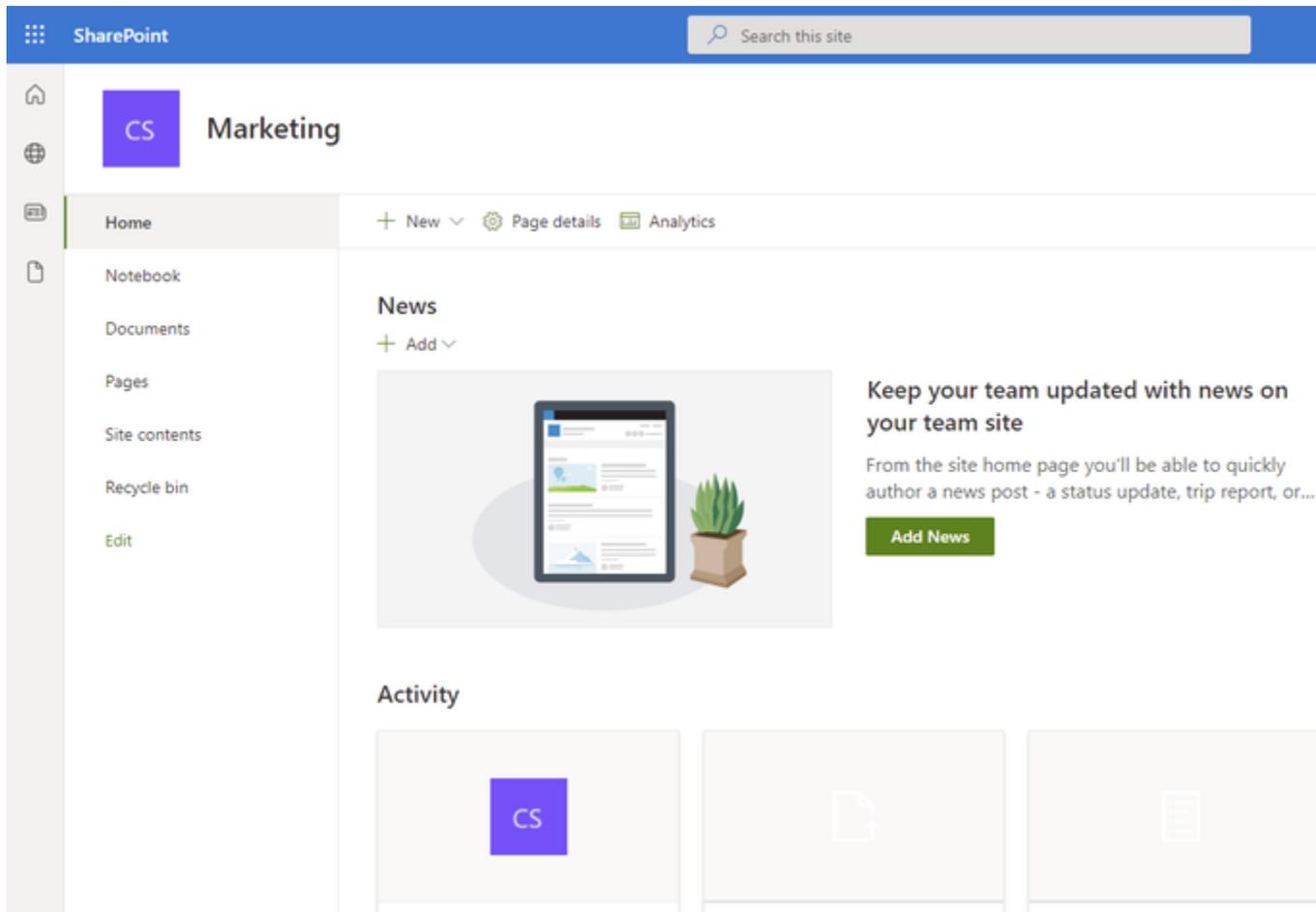
Create

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.

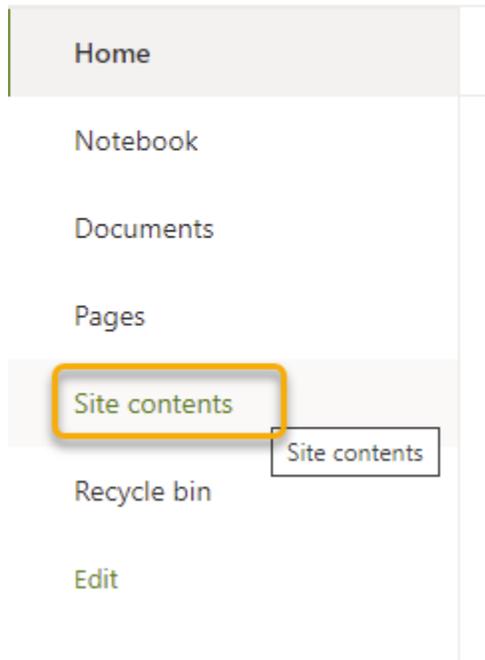
- E. You will automatically be navigated to the **Home** page of the new **Marketing** site. If you have not done much customization to the parent site it's hard to tell that this is a different site.



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.

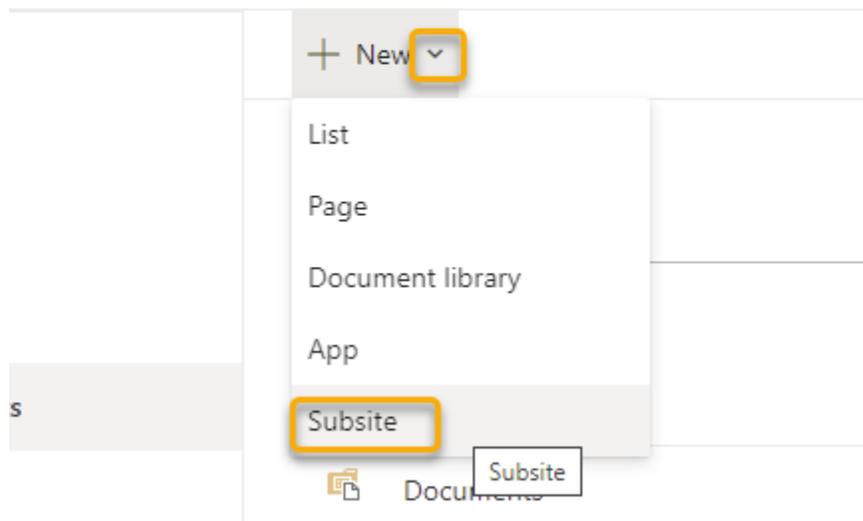
Contents

Subsites

 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:

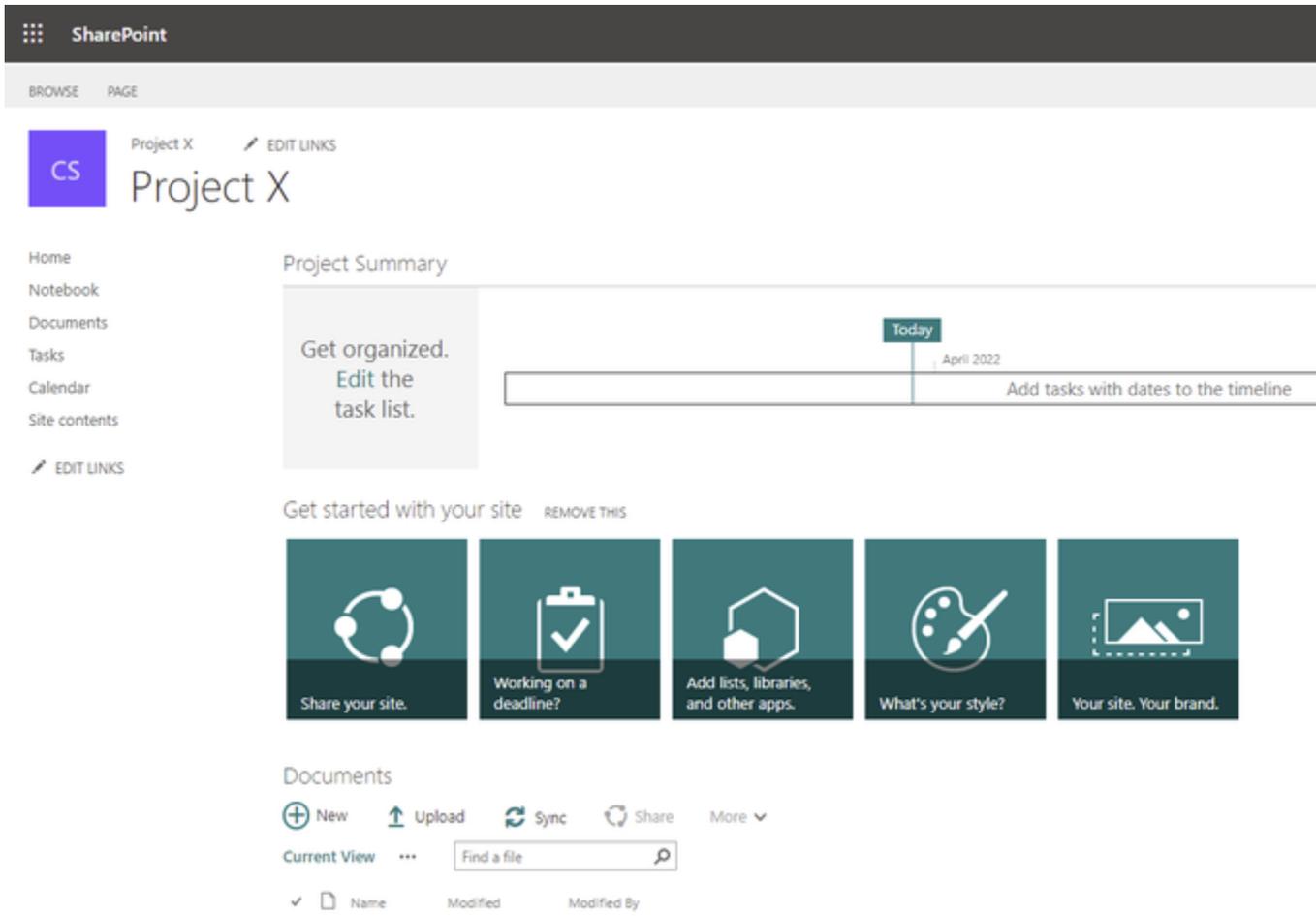
**Template Selection**

Select a language:

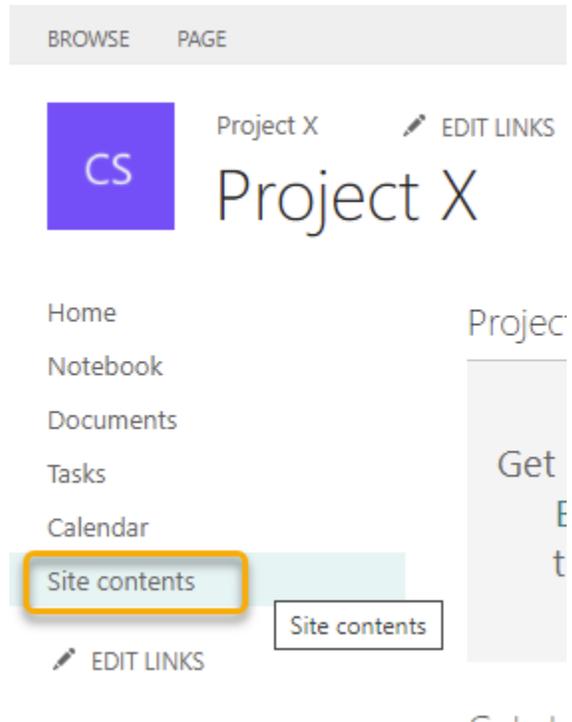
Select a template:

- 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

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

+ New ▾

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**Contents** Subsites

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

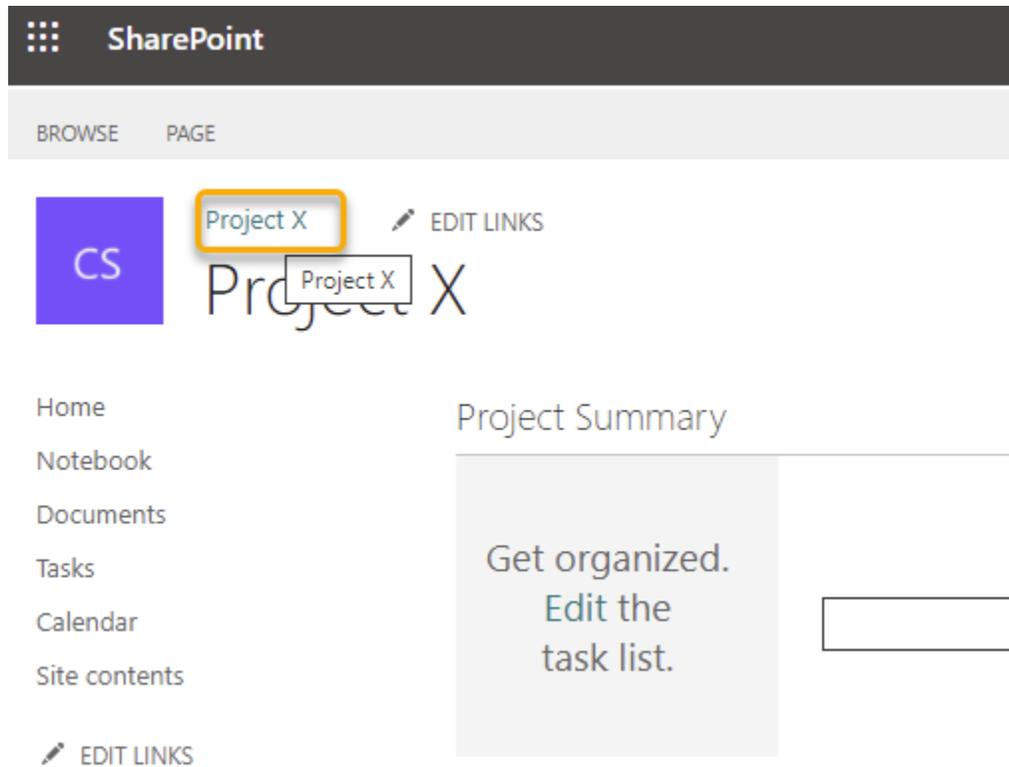
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## 1.3. Site Navigation

### ❖ 1.3.1. 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.

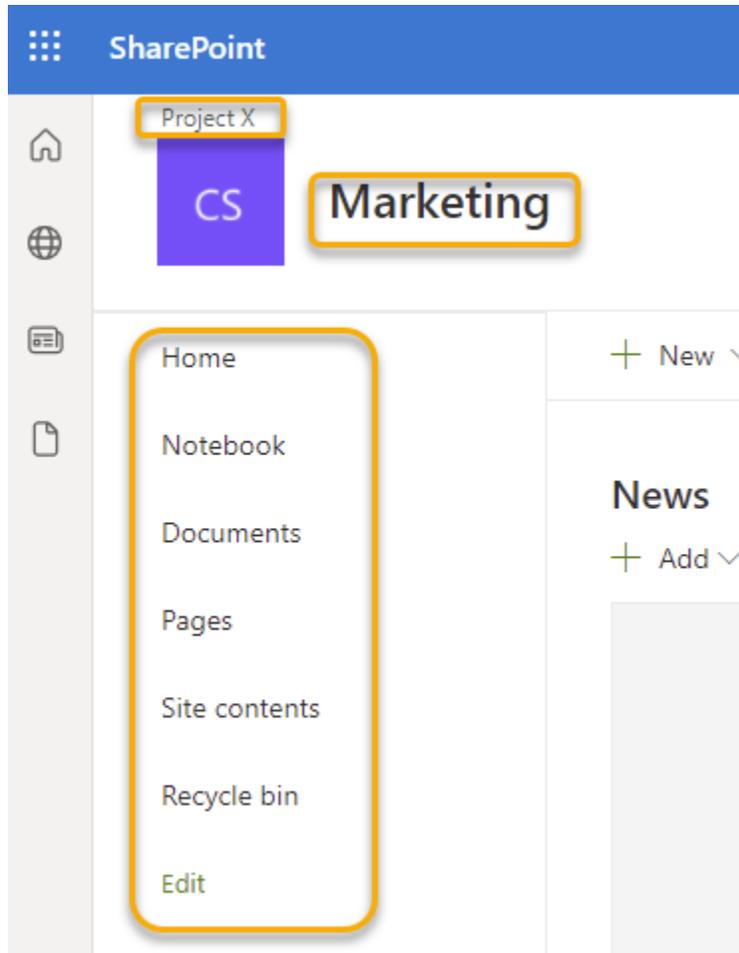
1. Verify that both the **Project X** and the **Marketing** sites have separate top link bars and Quick Launches.
  - A. Verify that you are currently in the **Project X** home page by clicking the **Project X** link in the top link bar.



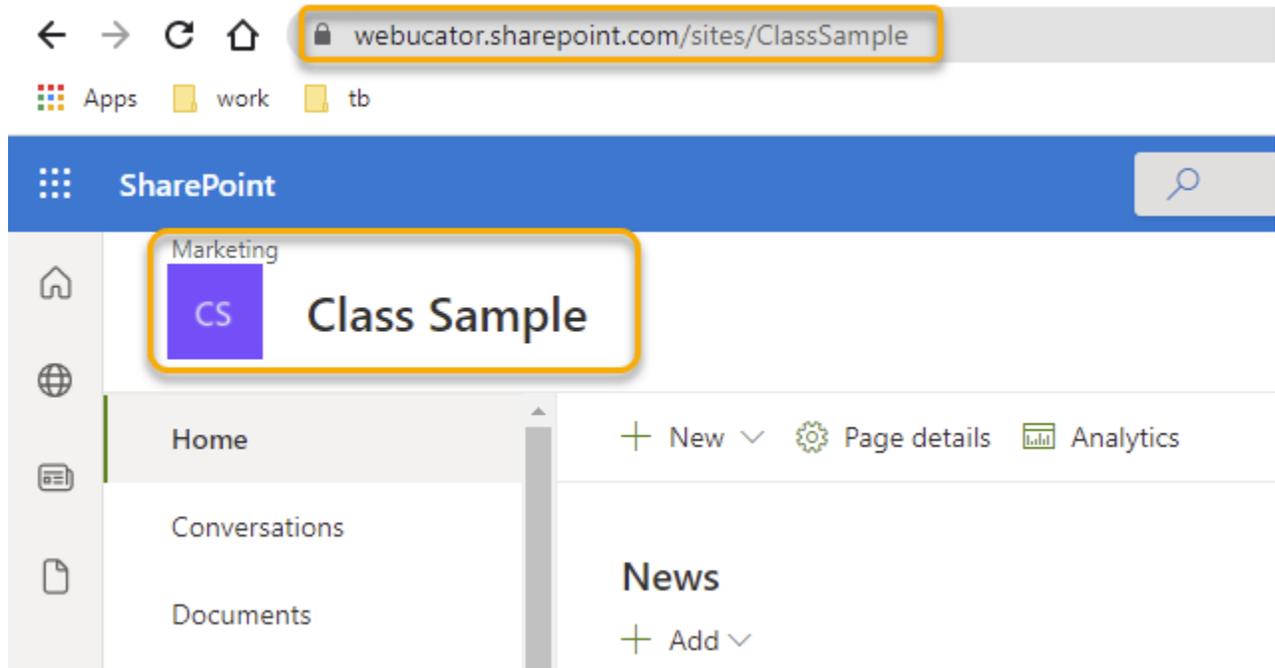
- B. Note that there are no additional links in the **Top link bar** of the **Project X** site.
- C. There is currently no obvious way to navigate back to the parent site **Marketing** from the child site **Project X**. To navigate back to **Marketing**, remove the text in browser's address field back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



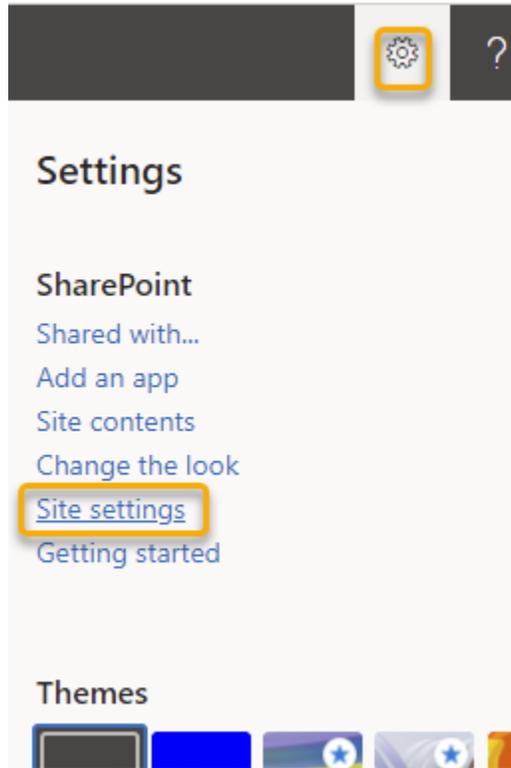
- D. Note that now the **Top link bar** has a **Marketing** link as well as a **Project X** link. Also note that the **Quick Launch Menu** lists only content from this site.



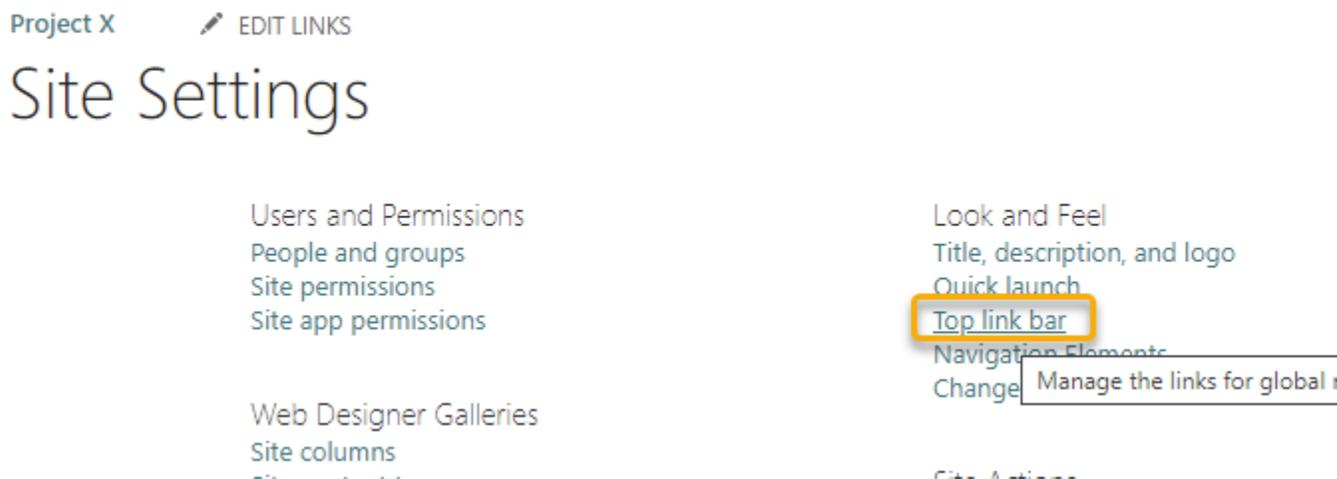
- E. Just as before, there is yet no obvious way to navigate to the parent site of **Marketing**. To navigate back to **Sample Site**, the root site, remove the text in browser's address field back to **before** "Marketing" as shown in the screen capture.



- 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.

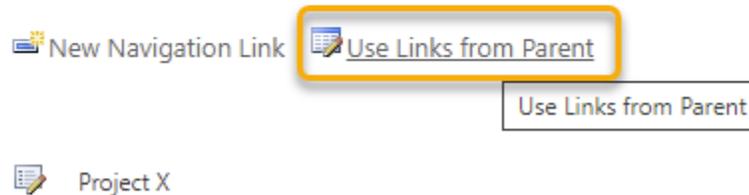


- C. Click the **Top link bar** link under the **Look and Feel** group on the **Site Settings** page.

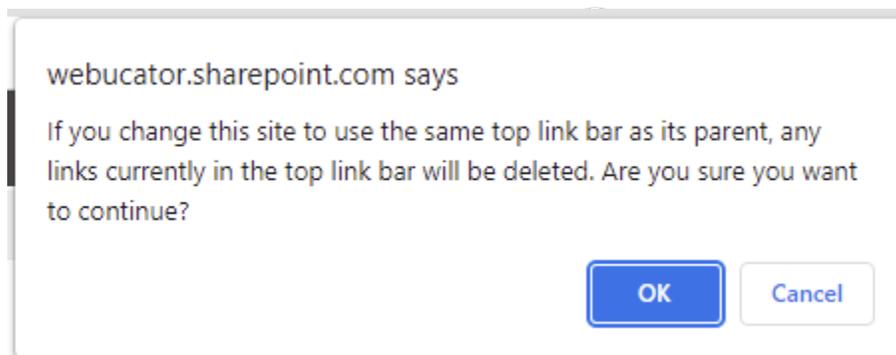


- D. Click the **Use Links from Parent** link on the **Top link bar** settings page.

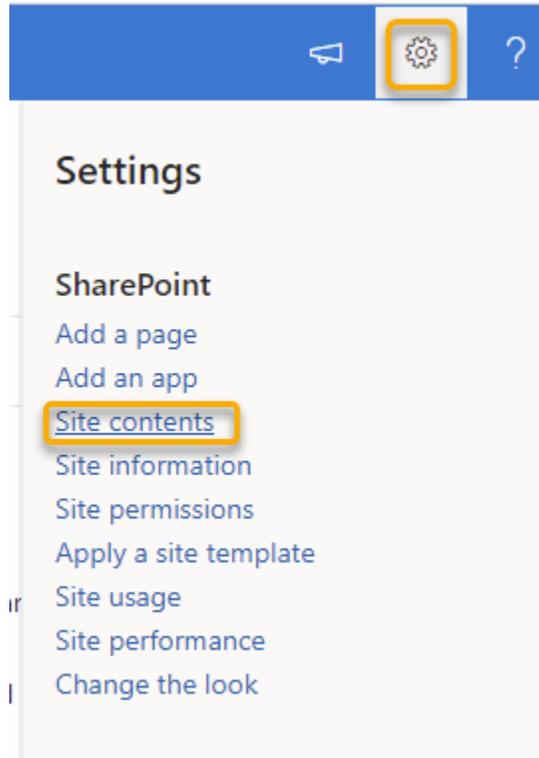
## Site Settings ▸ Top Link Bar ⓘ



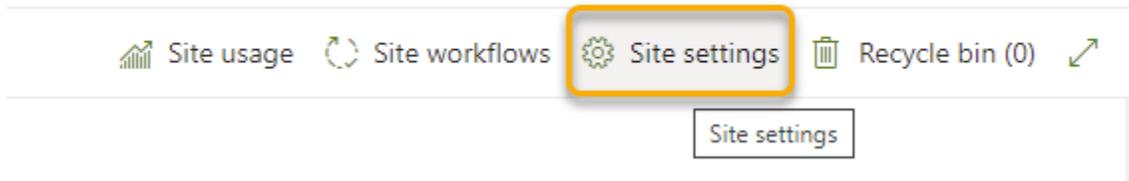
- E. Click the **OK** button on the **Message from web page** dialog window warning us that our current **Top link bar** links will be deleted.



- 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

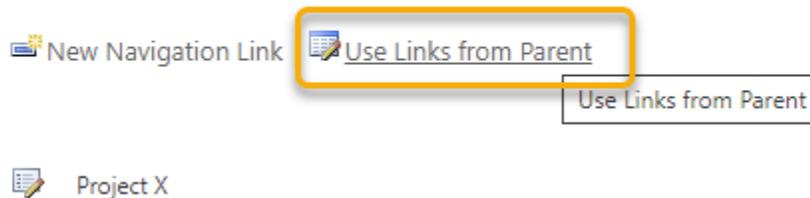
Users and Permissions  
People and groups  
Site permissions  
Site app permissions

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

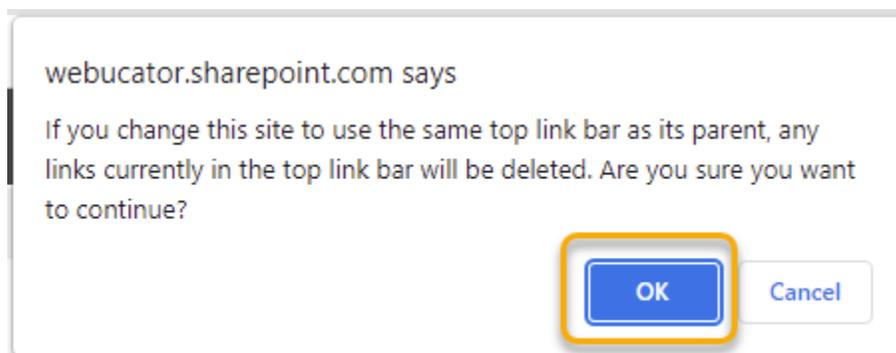
Web Designer Galleries

- 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.



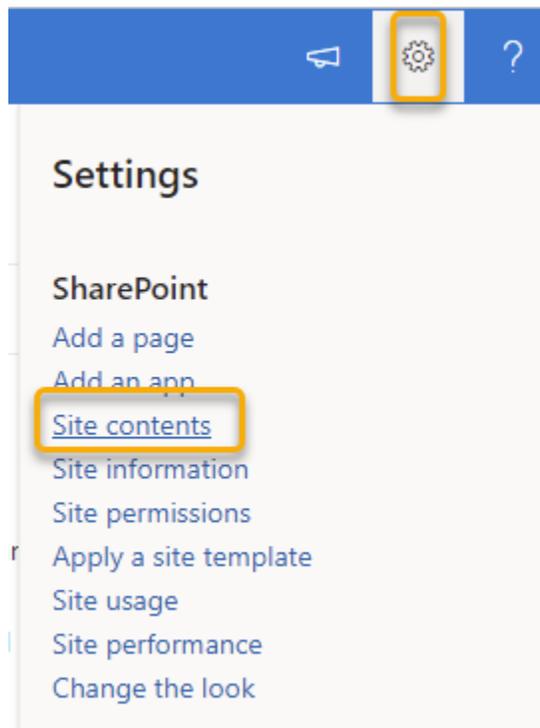
- F. Verify that now the **Marketing** site has the same **Top link bar** of the parent. Note: We will edit the home page of the Marketing site later and you will learn to create links. Links can help you customize and add in navigation that might be missing.

# Exercise 1: Creating Team Sites

 10 to 15 minutes

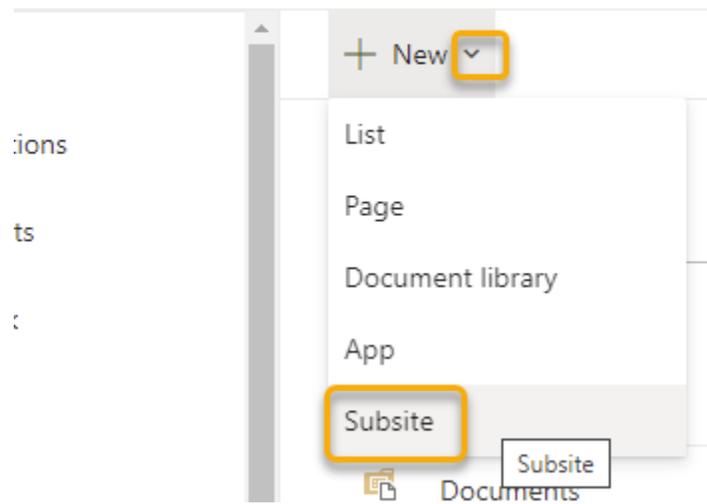
In this exercise, you will create a new site based on the **Team Site** template in the class sample site. In addition, you will test and modify the navigation options from parent site to child site.

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/acco

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

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- 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



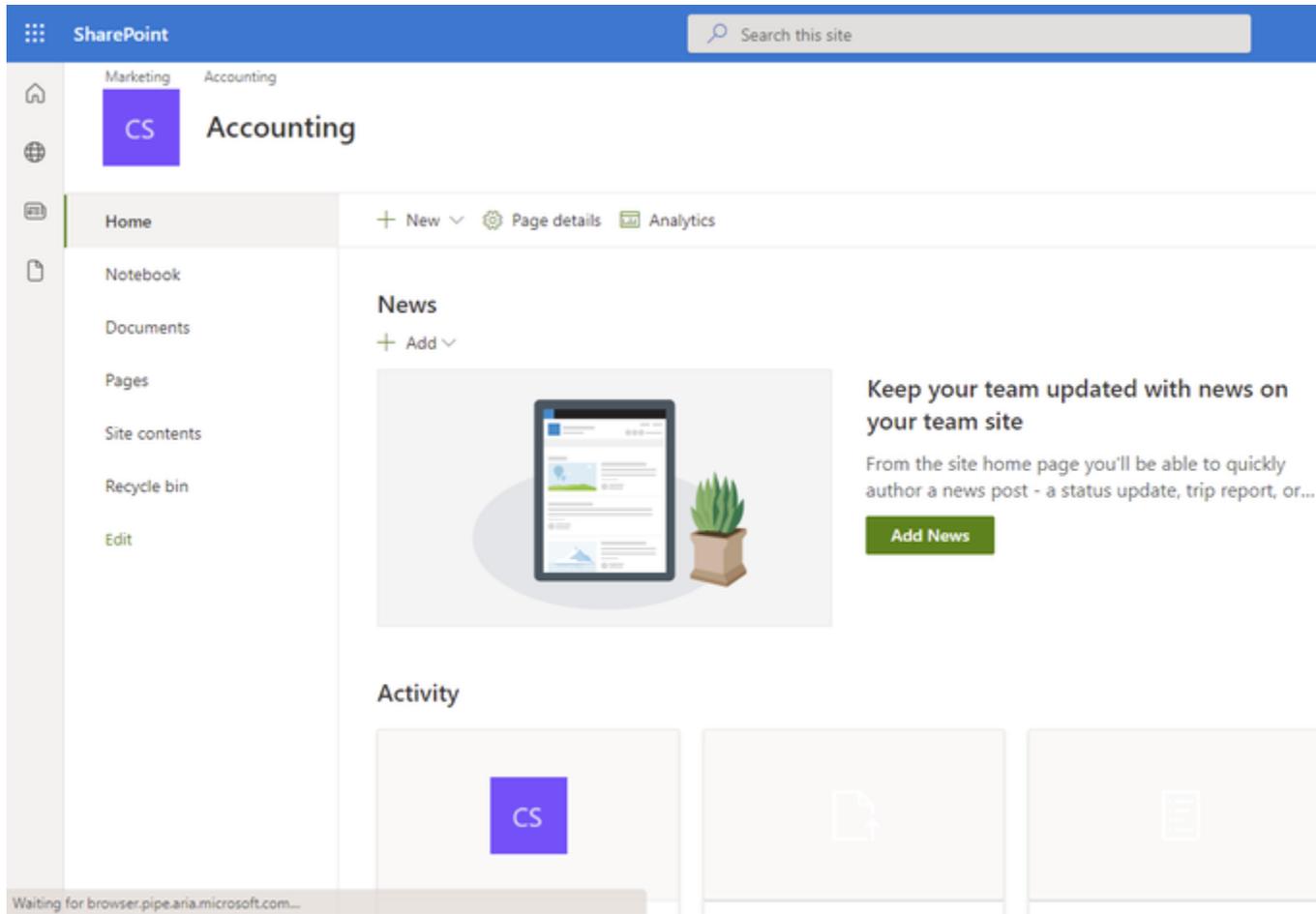
Use the top link bar from the parent site?

- Yes
- No

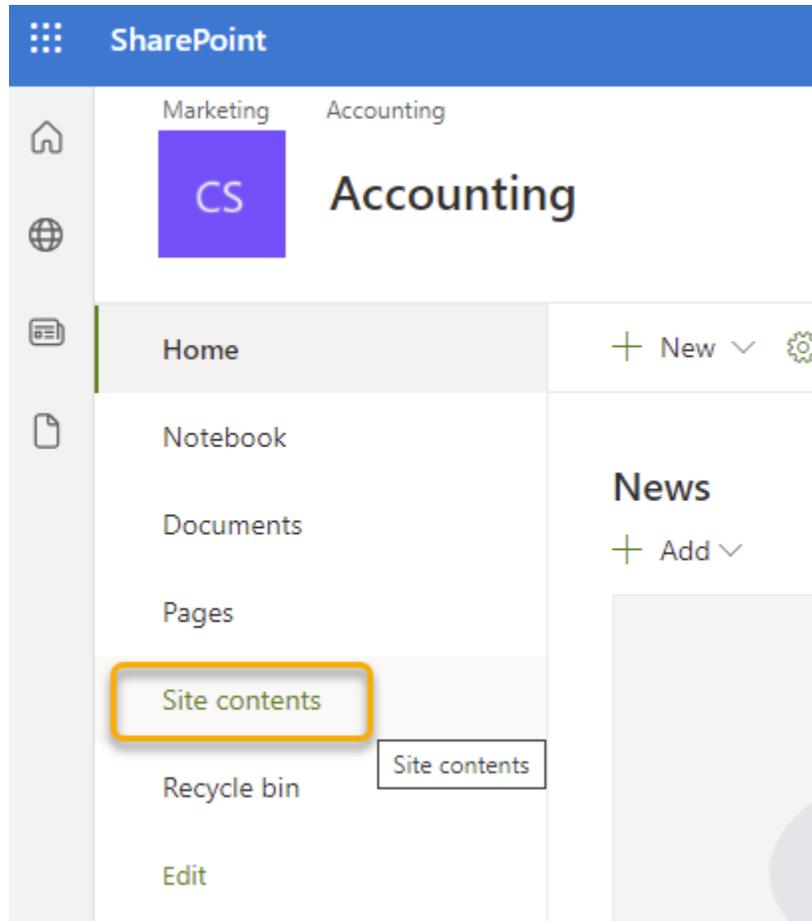
Create

Cancel

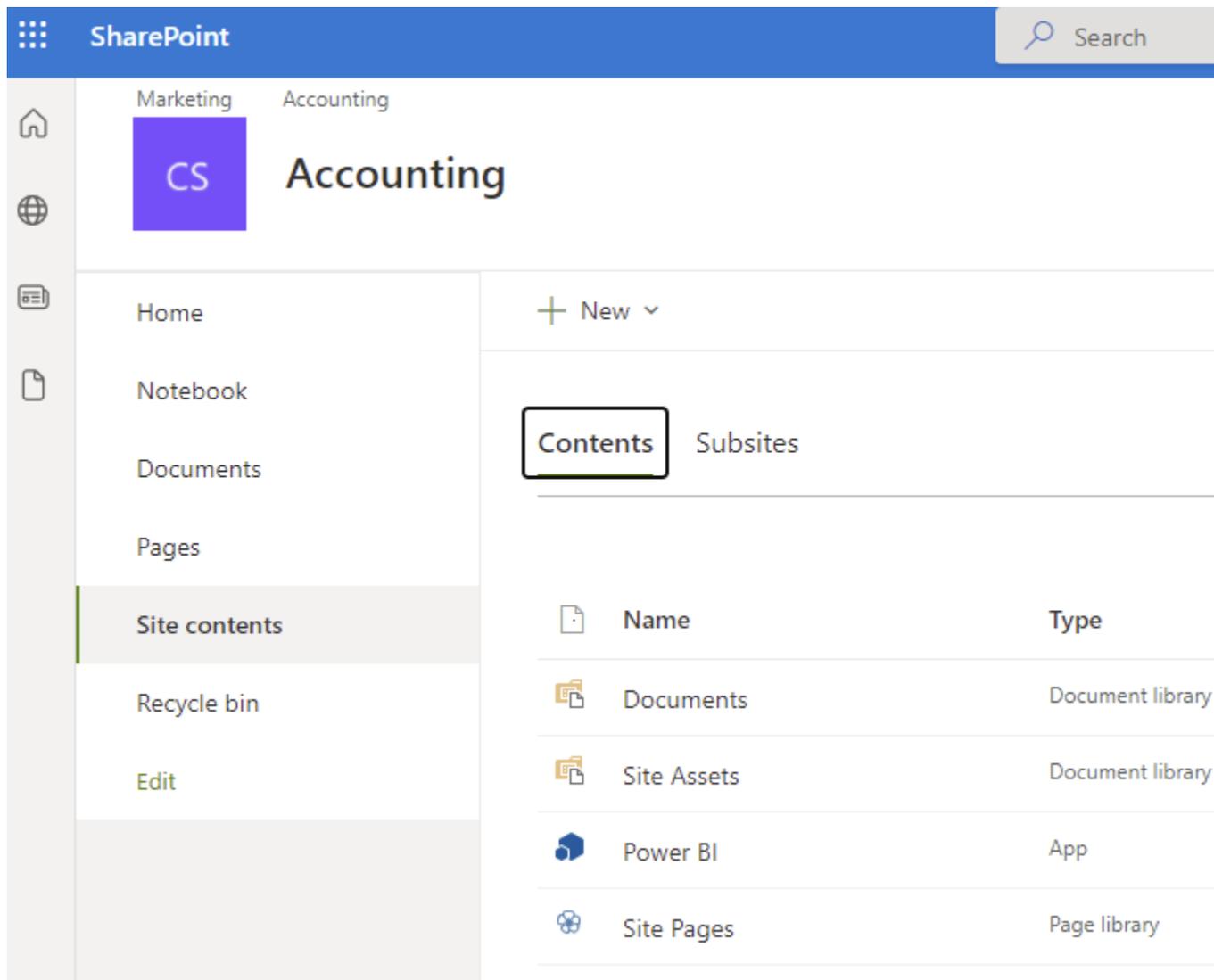
- E. You will automatically be navigated to the **Home** page of the new **Accounting** site. If you have not done much customization to the parent site it's hard to tell that this is a different site.



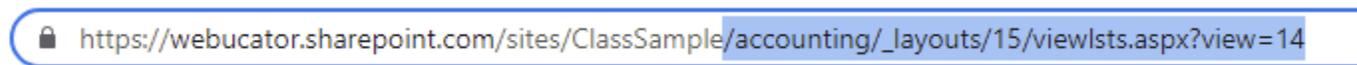
2. Explore the content of the new child **Accounting** Team Site.
  - A. In the **Accounting** site, click the **Site Contents** link in the **Quick Launch** menu.



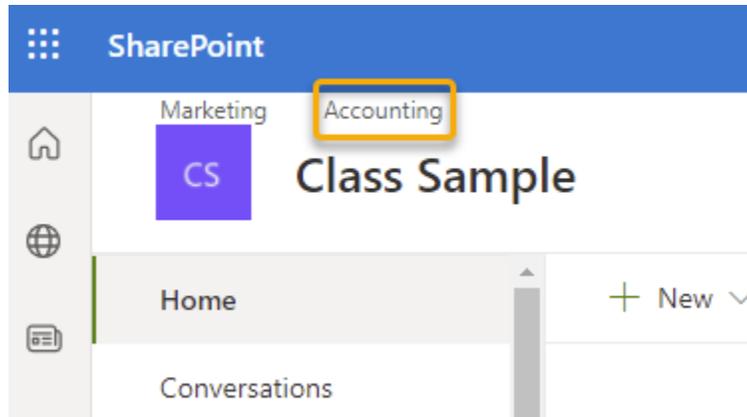
- B. Take a few moments to look through the Lists and Libraries created by default from the **Team Site** template.



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.



*Evaluation Copy*

## 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 2

## Page Content

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### 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.



## 2.1. Site Pages

### ❖ 2.1.1. 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

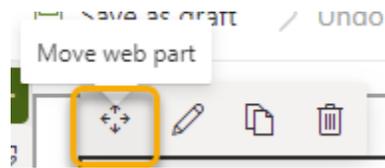


## Quick links

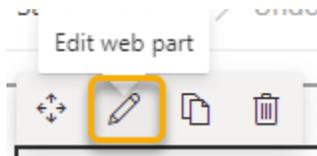
3. Click News. You will have options for this Web Part. Please review.

The screenshot shows the SharePoint News web part configuration interface. At the top is a blue header with the 'SharePoint' logo and a search bar. Below the header is a toolbar with icons for 'Save as draft', 'Undo', 'Discard changes', 'Page details', and 'Analytics'. The main area is titled 'News' and includes an '+ Add' button. A large preview area shows a tablet displaying a news article and a potted plant. To the right of the preview, there is a text block that reads: 'Keep your team updated with your team site' and 'From the site home page you'll be able to author a news post - a status update'.

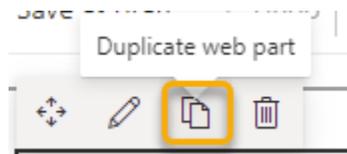
A. Move Web Part.



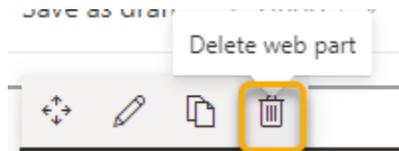
B. Edit Web Part.



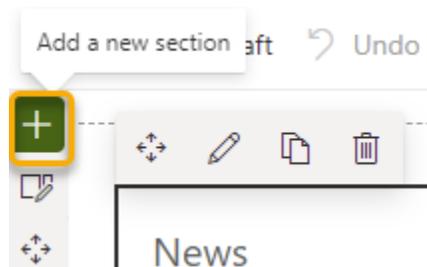
C. Duplicate Web Part.



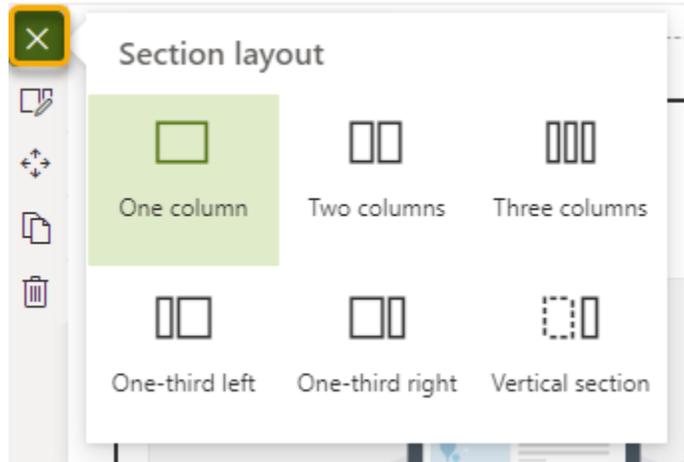
D. Delete Web Part.



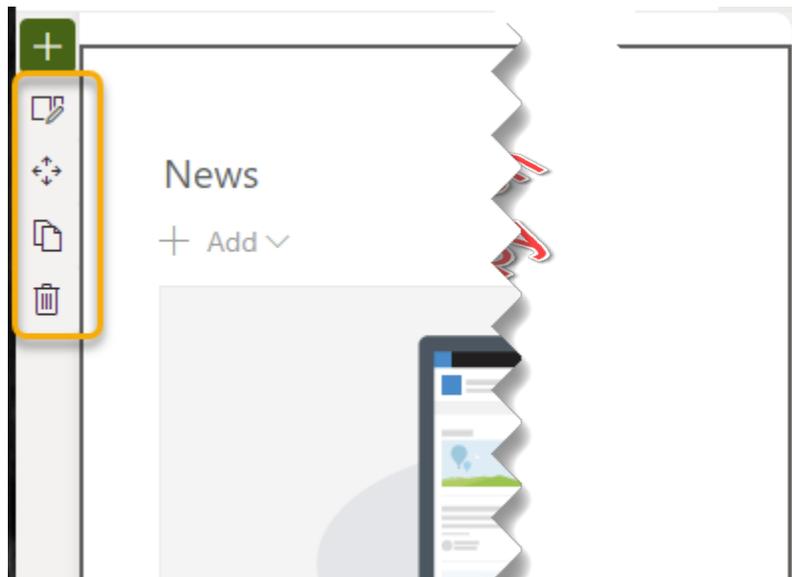
4. Notice the + to add a section. Click to see options and you may choose a section layout.



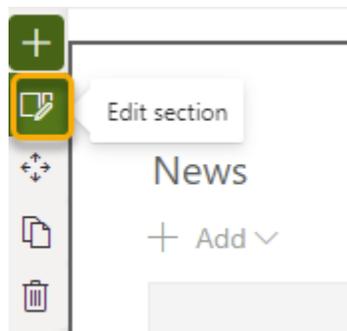
5. Click the X to cancel.



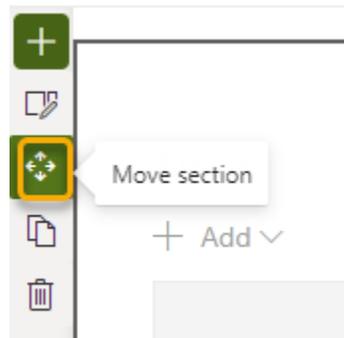
6. Click an existing section and review the options.



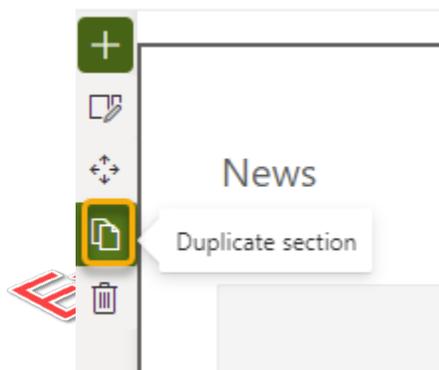
A. Edit Section.



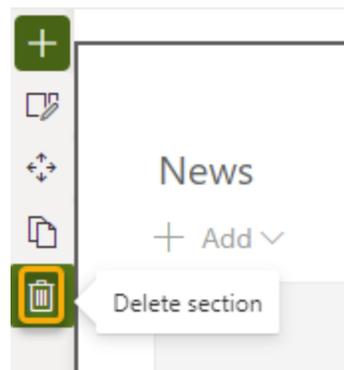
B. Move Section.



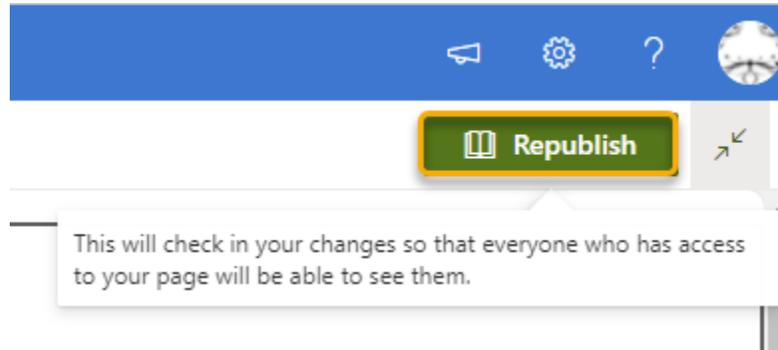
C. Duplicate Section.



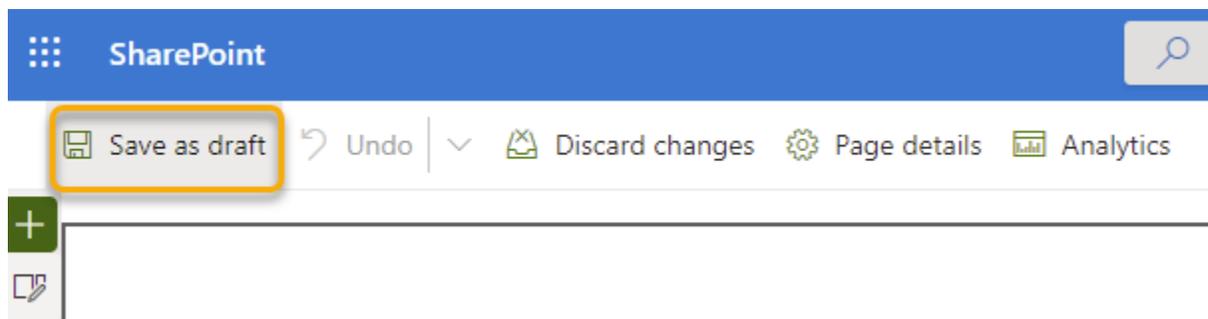
D. Delete Section.



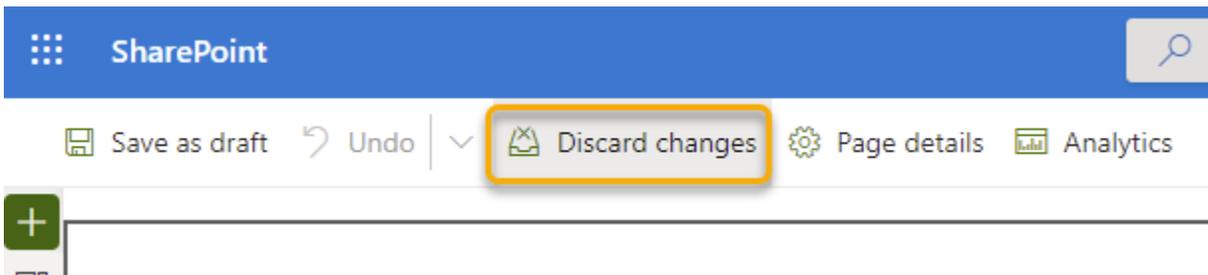
7. Once you make changes you will need to Republish to save and make the new updates live to the audience.



- 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.

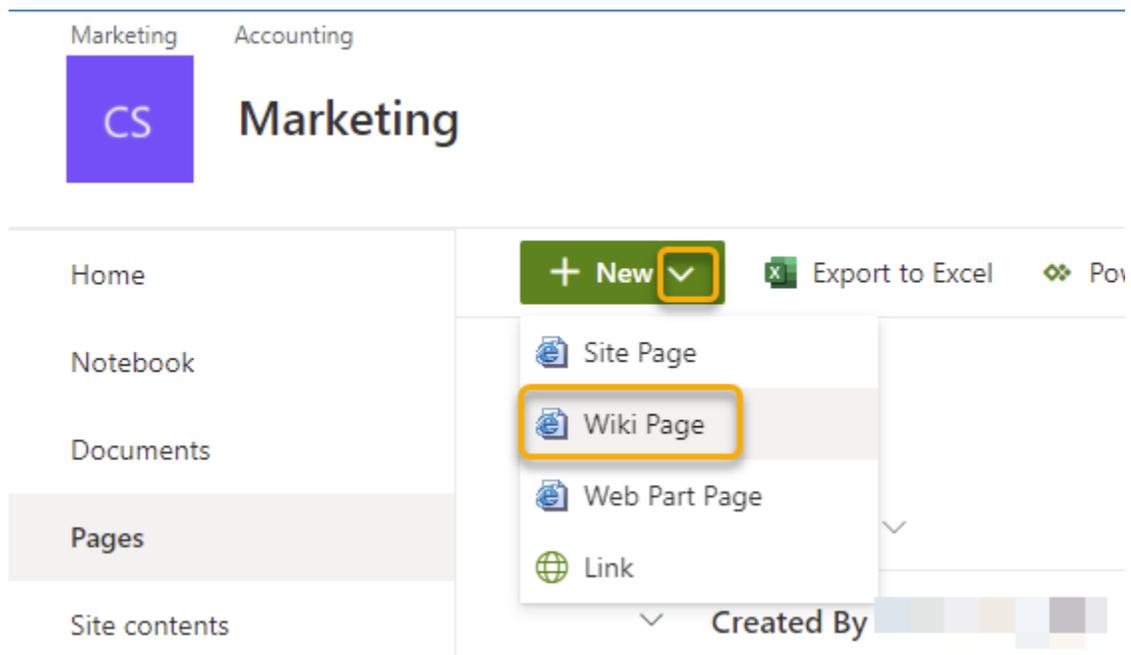


## 2.2. Wiki Library Pages

### ❖ 2.2.1. 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**.



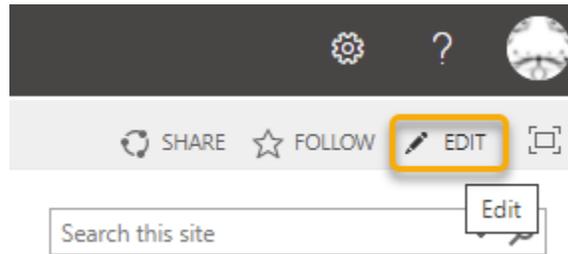
3. Name page "Sample page" and click **Create**.

## New Item

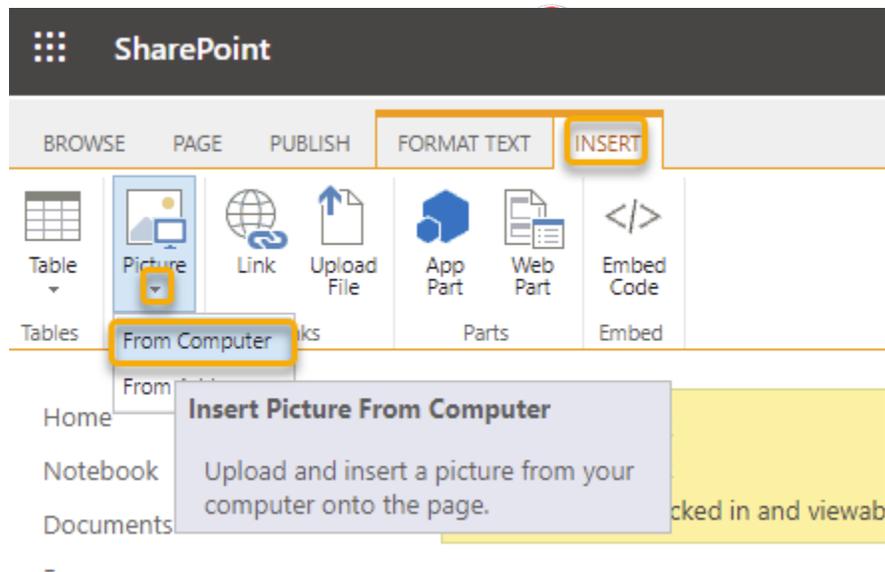
New page name:

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

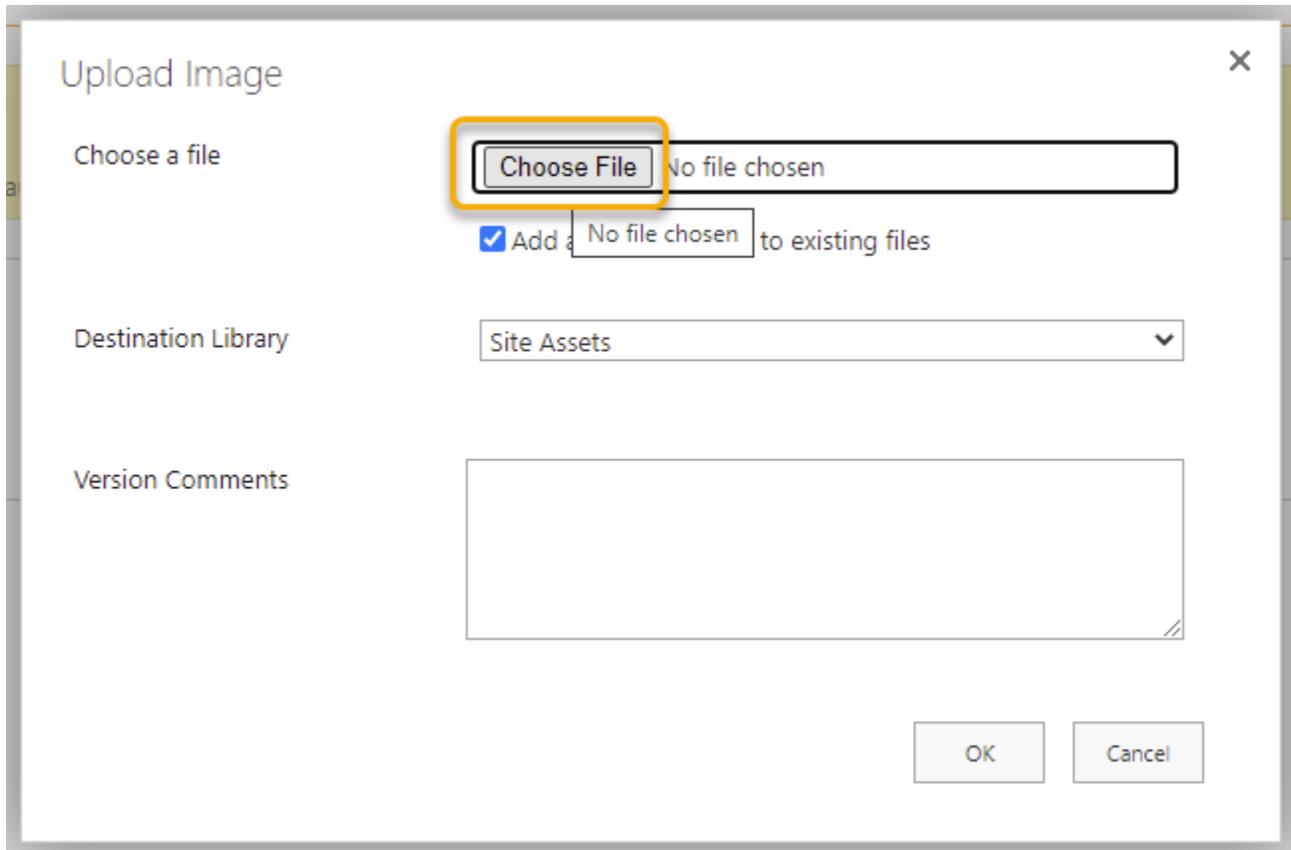
- You might need to click the **EDIT** link located below the **Settings** cog icon if your page was already made.



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



- 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 too large. Use image tab to make the image the correct size.

SharePoint

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

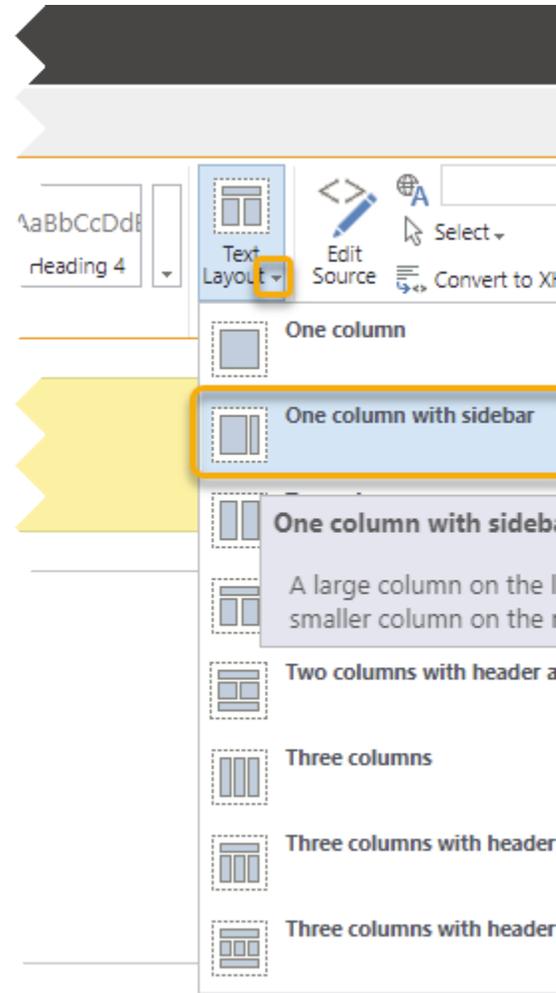
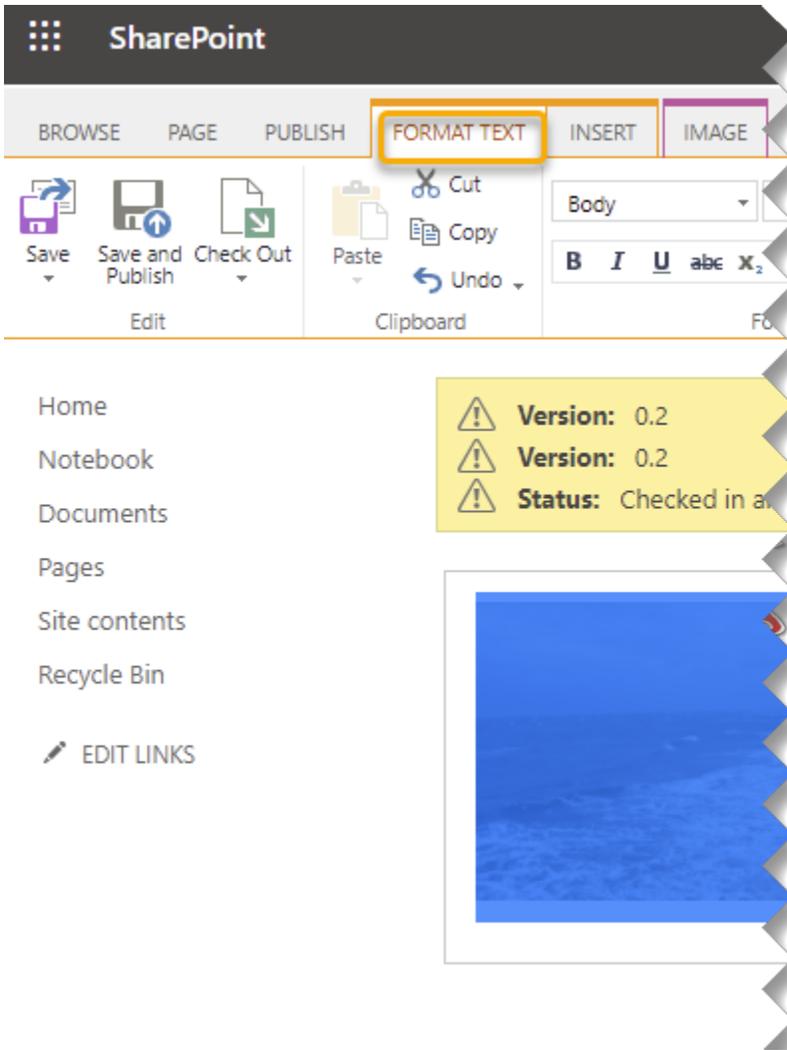
Change Picture ▾ Address: /sites/ClassSample/marke  
Alt Text: ocean.jpg Image Styles ▾ Position ▾  
Horizontal Size: 200 px  
Vertical Size: 150 px  
 Lock Aspect Ratio

Select Properties Styles Arrange Size

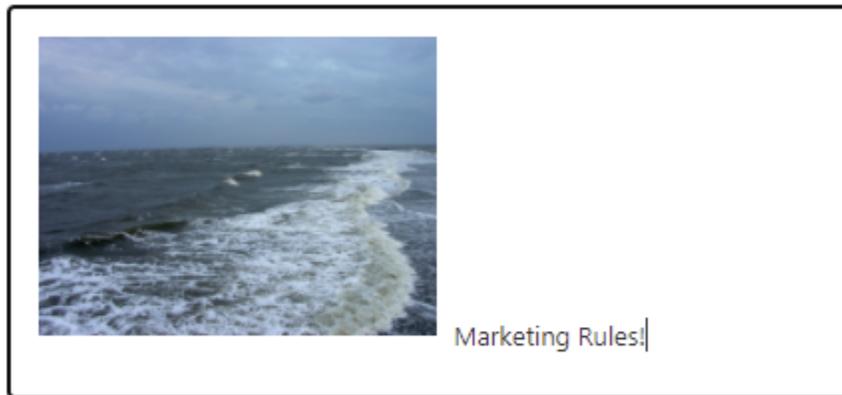
Home  
Notebook  
Documents  
Pages  
Site contents  
Recycle Bin  
EDIT LINKS

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

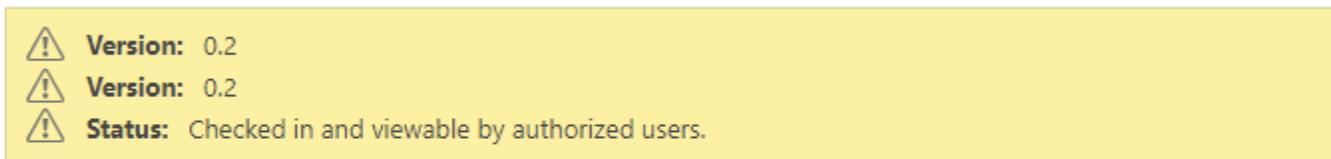
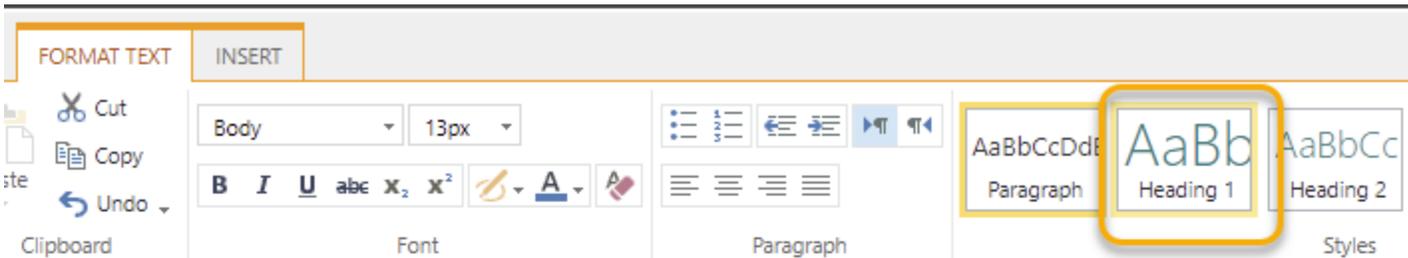
9. Click the **OK** button to complete the image upload. Note that the file will be loaded to the **Site Assets** library by default.
10. With the **Marketing** site's new page still in edit mode, click the **Format Text** tab to open the toolbar. Click the **Text Layout** drop-down button and select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



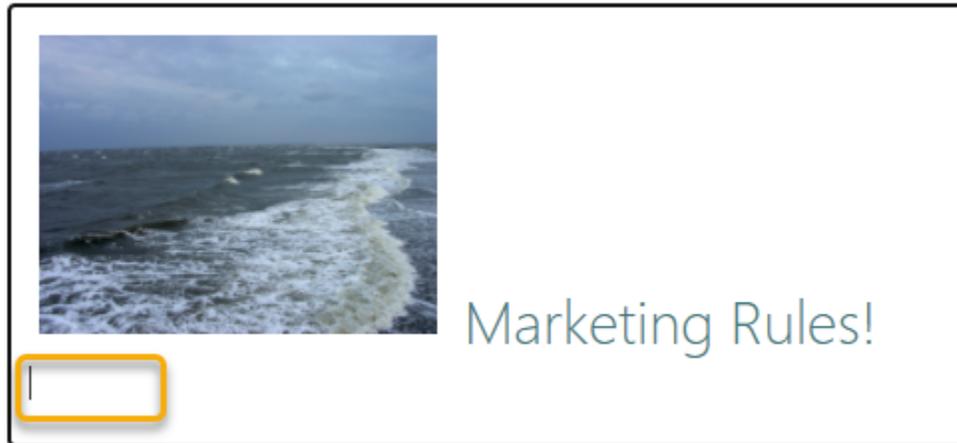
11. Add text above the image added earlier by hovering and click just to the left of the image so that the insertion point is located right next to the image. Type the following text to the left of the image: Marketing Rules!



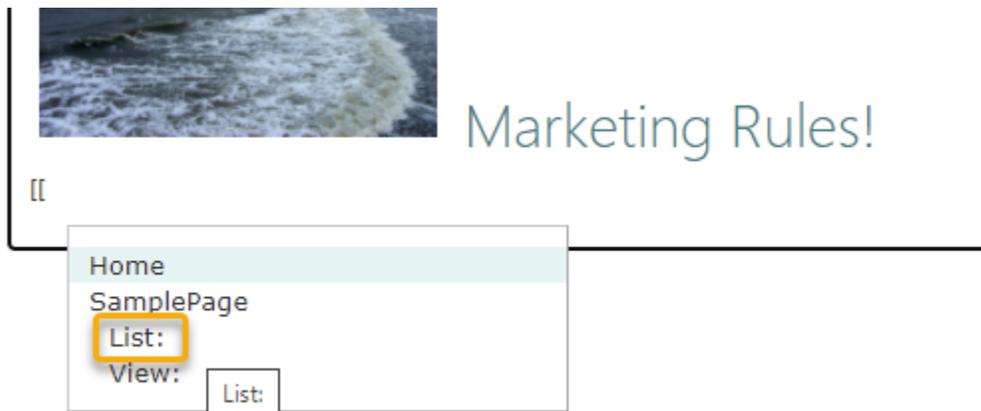
12. Highlight the text we just typed, "Marketing Rules!" and click the **Heading 1** option from the **Styles** area of the **Format Text** toolbar.



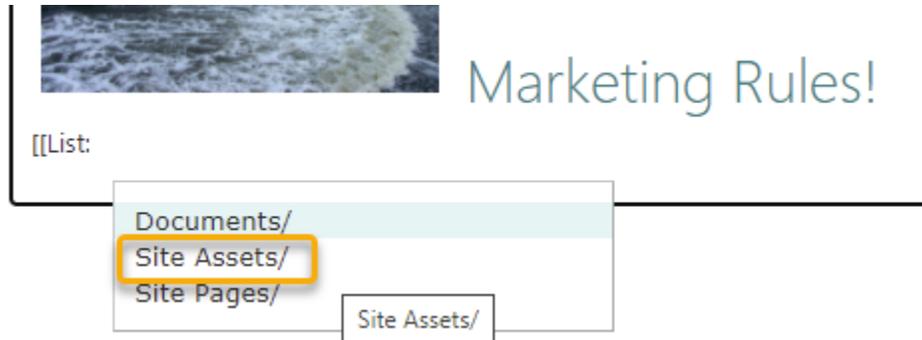
13. Add a link to the new, make sure page is still in edit mode hover and click to add your insertion point just below the “Marketing Rules!” text.



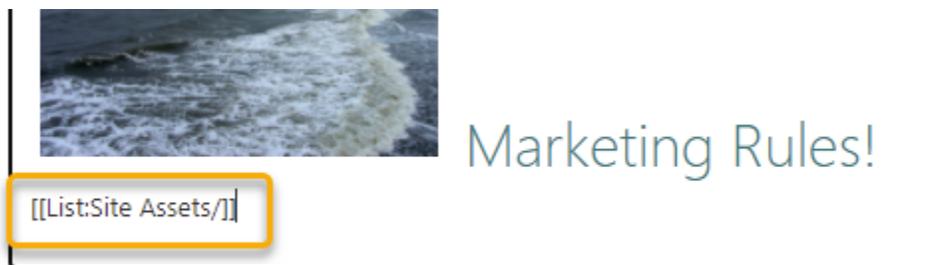
14. On the new line type the following: []. A menu will open after you type the second “[”, select **List:** from the menu.



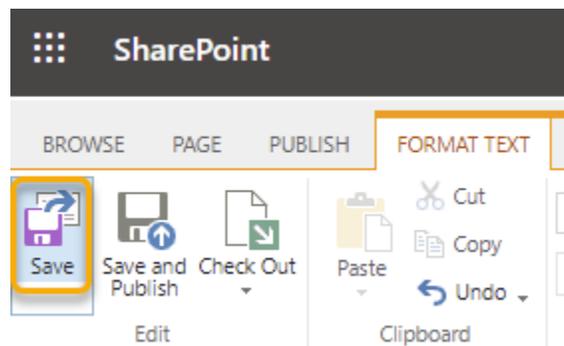
15. From the second menu, select **Site Assets/** from the list.



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!

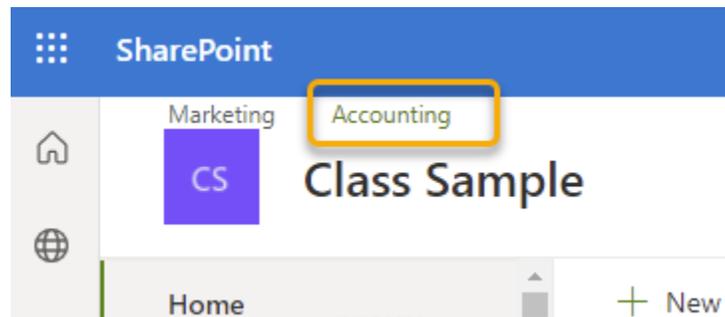
Site Assets

# Exercise 2: Working with Site Pages

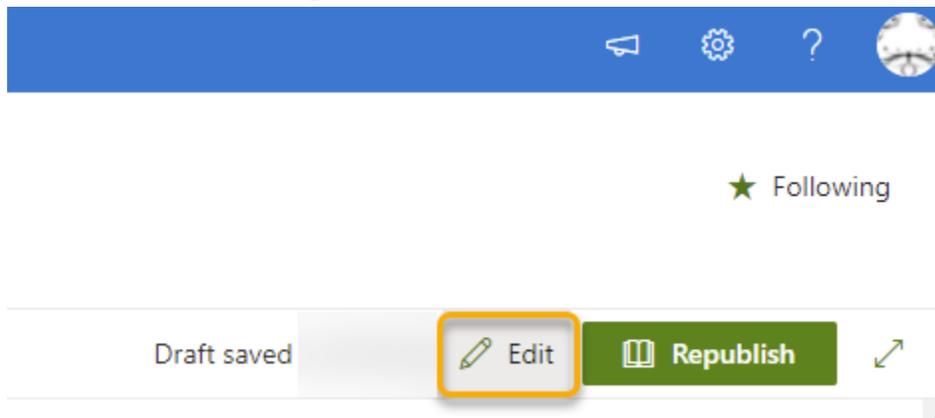
🕒 15 to 25 minutes

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

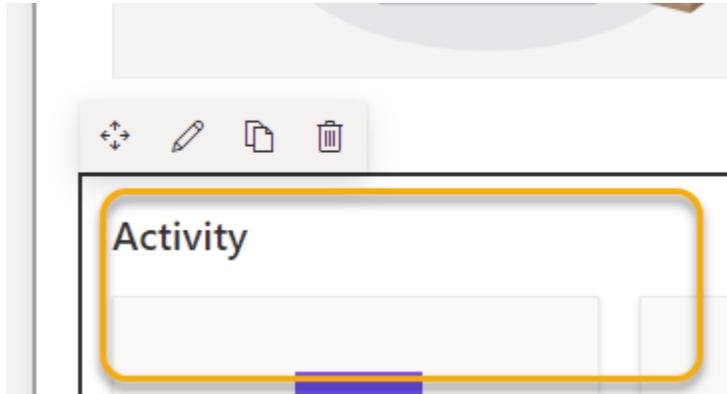
1. Go to the **Accounting** site.



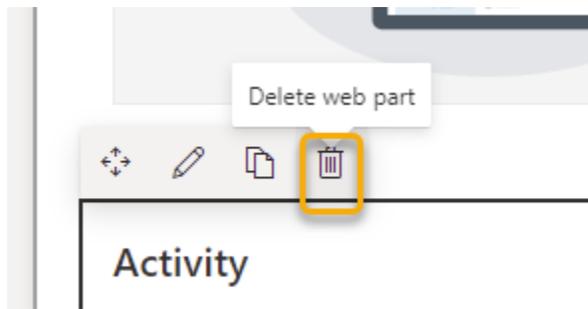
2. Click **Edit** to enter edit mode.



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

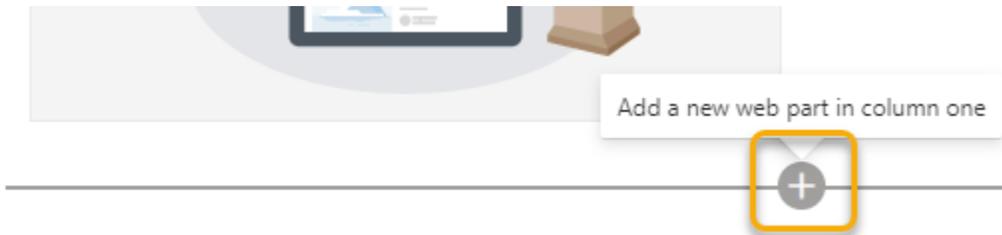


B. Delete Webpart.

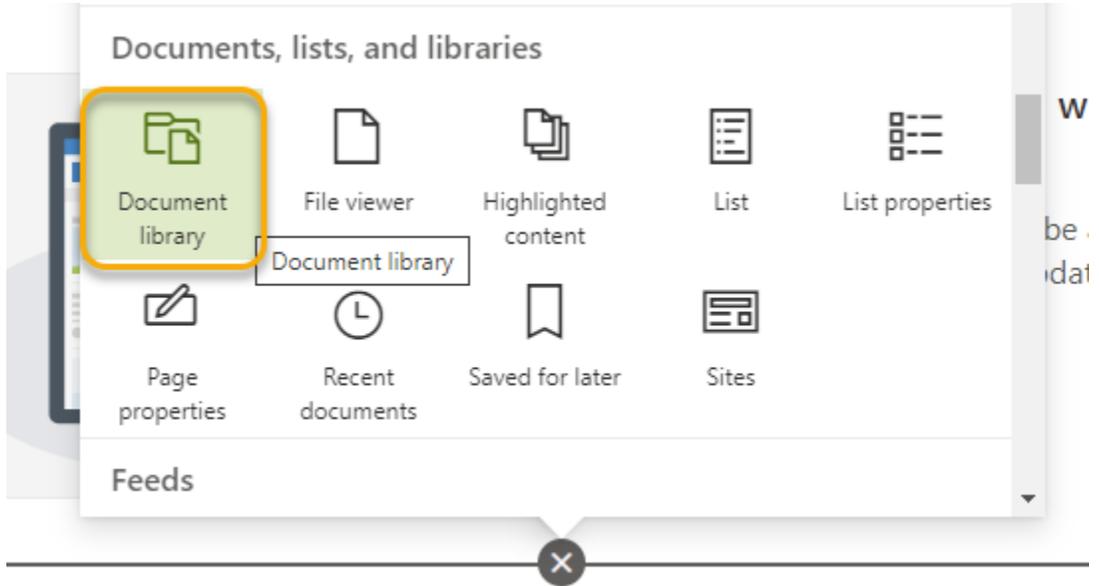


4. Add a new Webpart.

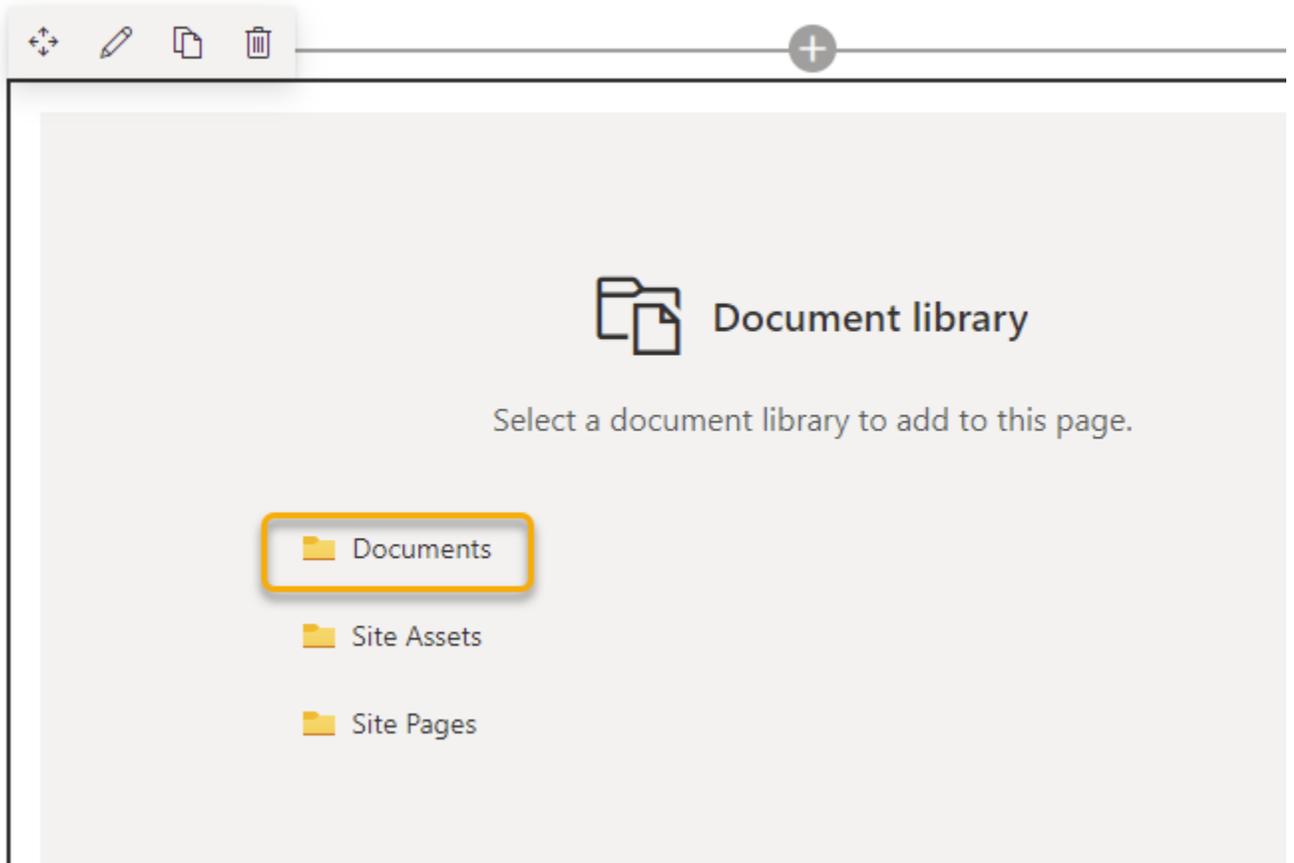
A. Locate and click the +. Hover where you want to add the webpart and the + will appear if a webpart may be added here.



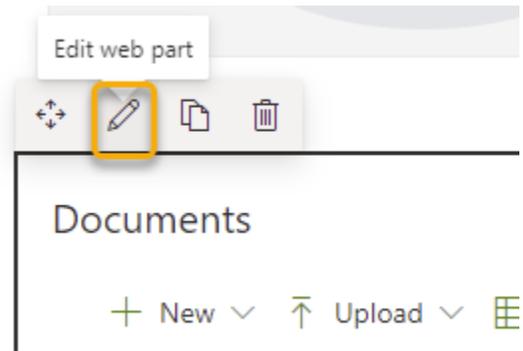
B. Scroll down to locate and click Document Library.



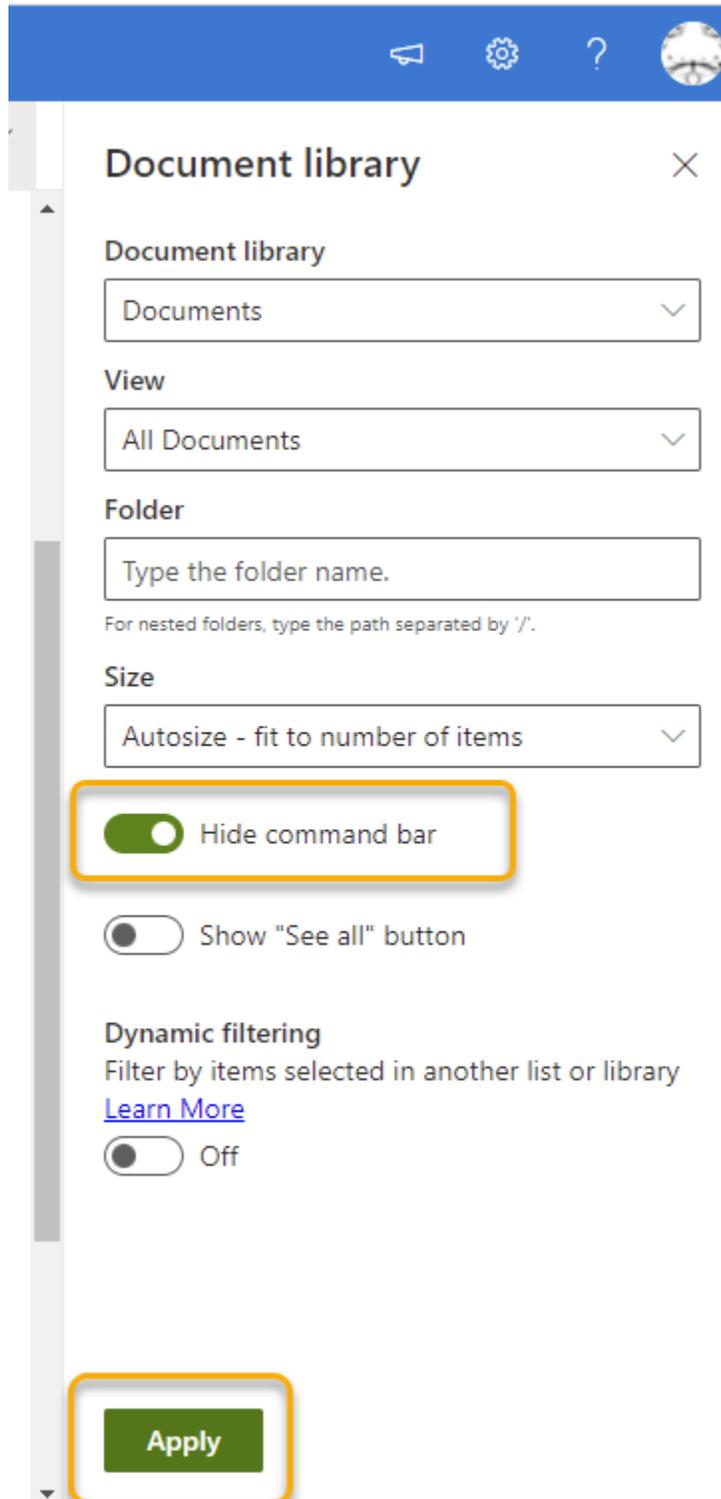
C. Choose one of the Document Libraries available.



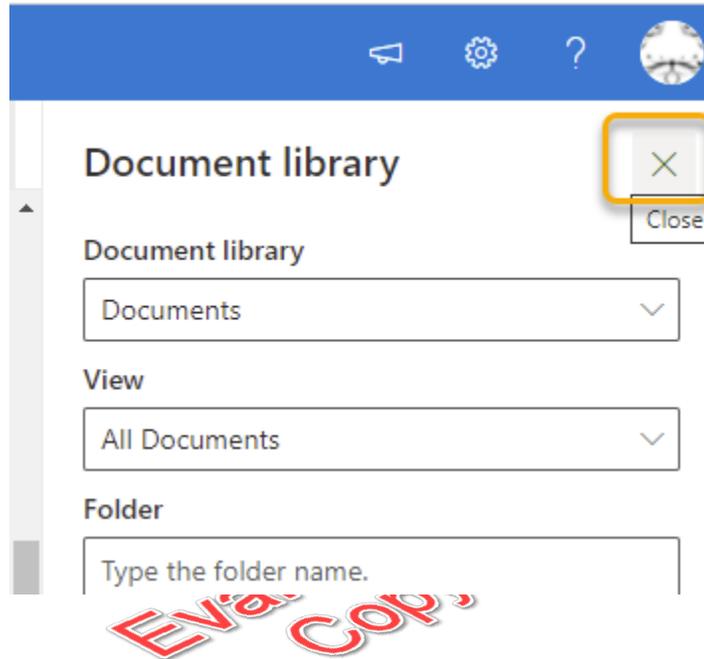
D. Edit webpart.



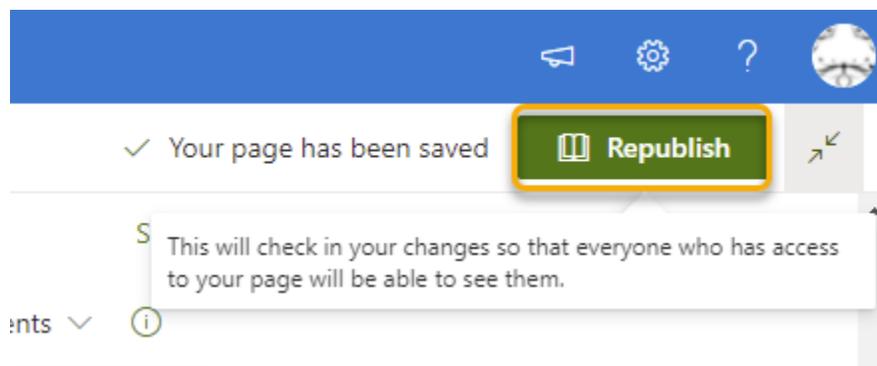
E. Hide Comand bar and click Apply.



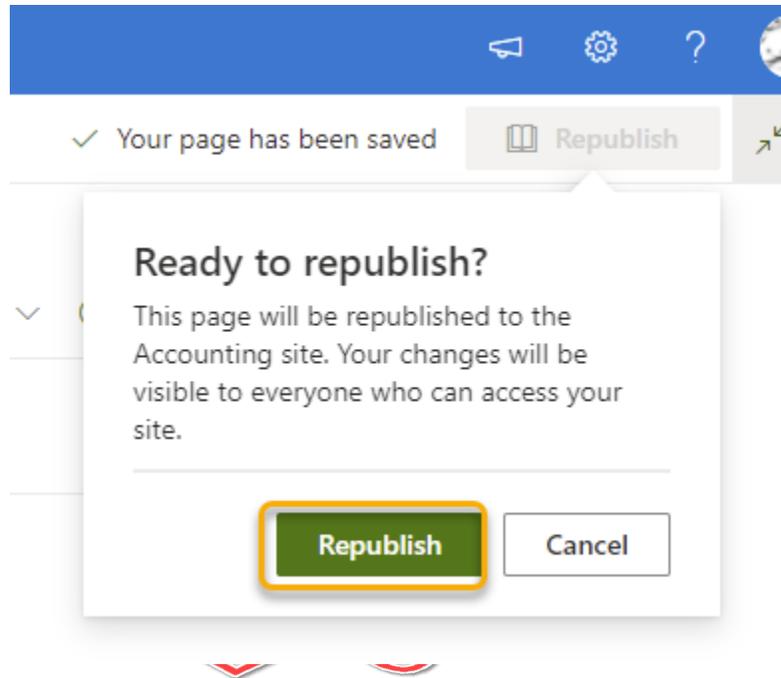
F. Close Document Library options.



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 3

## 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.



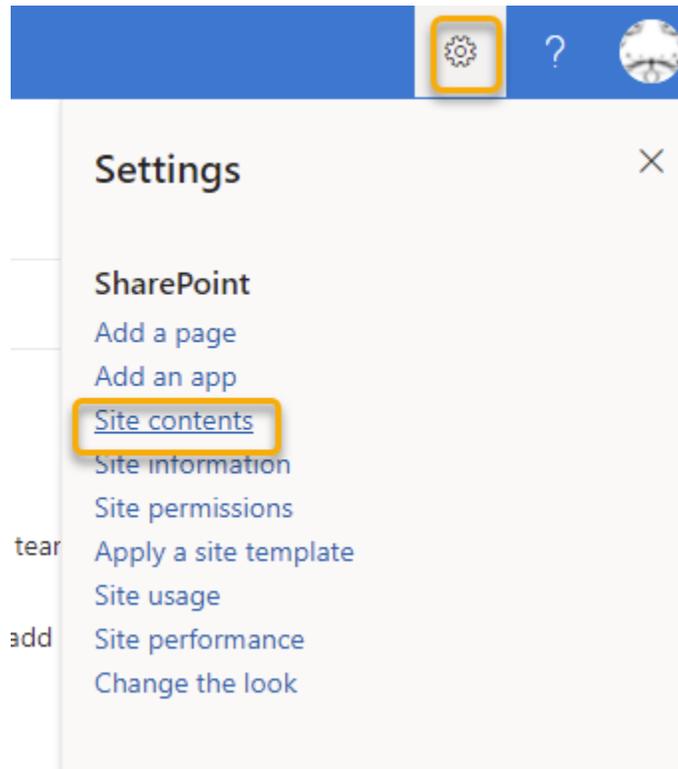
## 3.1. Site Column Gallery

### ❖ 3.1.1. Explore the Site Column Gallery

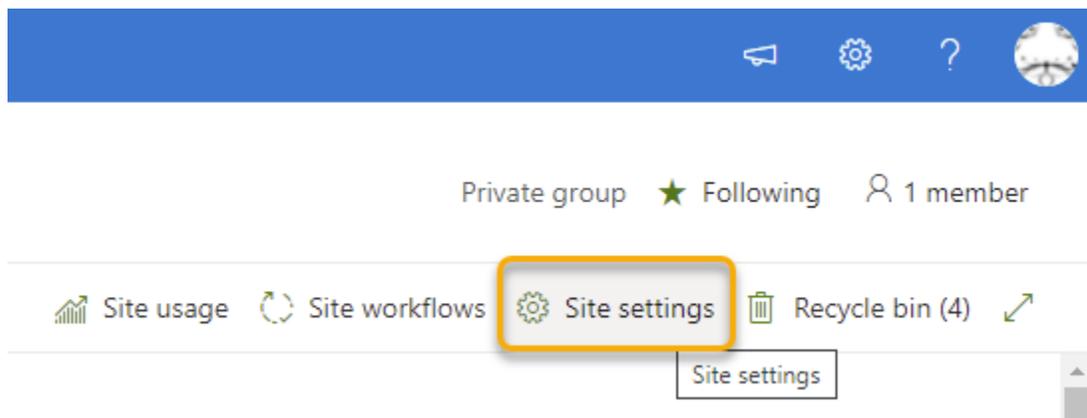
This walk-through will explore the columns available in the Site Column Gallery. Please note that based on your installation and security settings, you may not be able to try all of the features you see below.

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

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

SharePoint

Marketing Accounting EDIT LINKS

## Site Settings ▸ Site Columns ⓘ

Home Conversations Documents Notebook Pages Recent Issue List DemoList Order Status Corp Events Office Inventory MyDocs

Create

Show Group:

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.

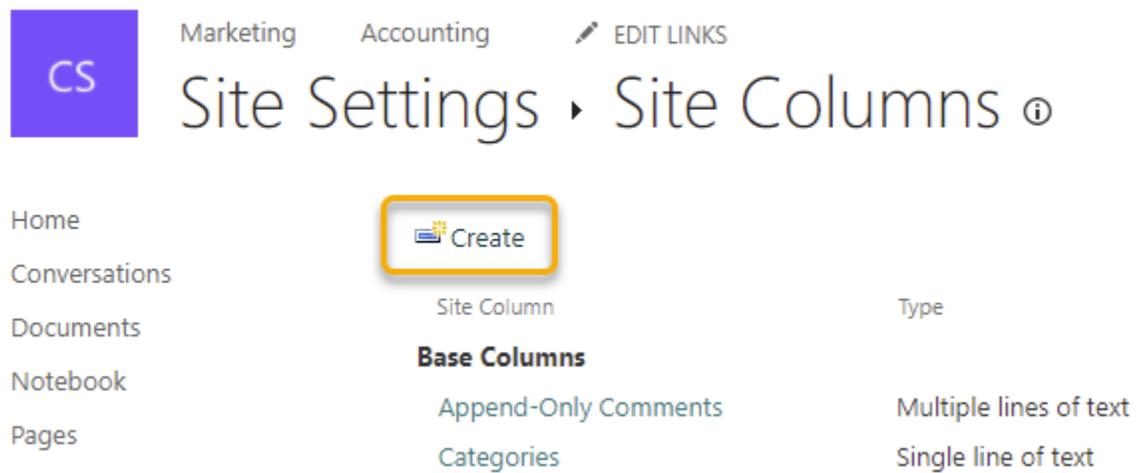


## 3.2. Creating Site Columns

### ❖ 3.2.1. 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

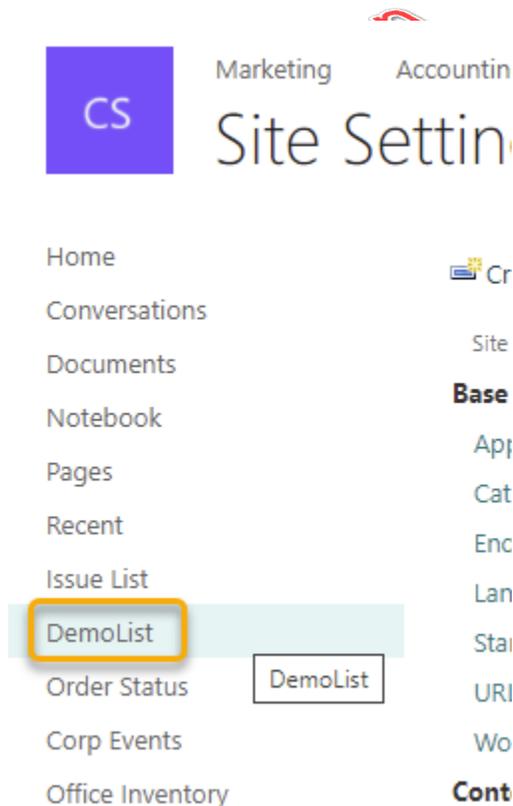
5. Click the **OK** button at the bottom of the form to save your work.
6. If you scroll down the list of **Site Columns**, you will find the new column **Favorite Colors** under the **Custom Columns** group.

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

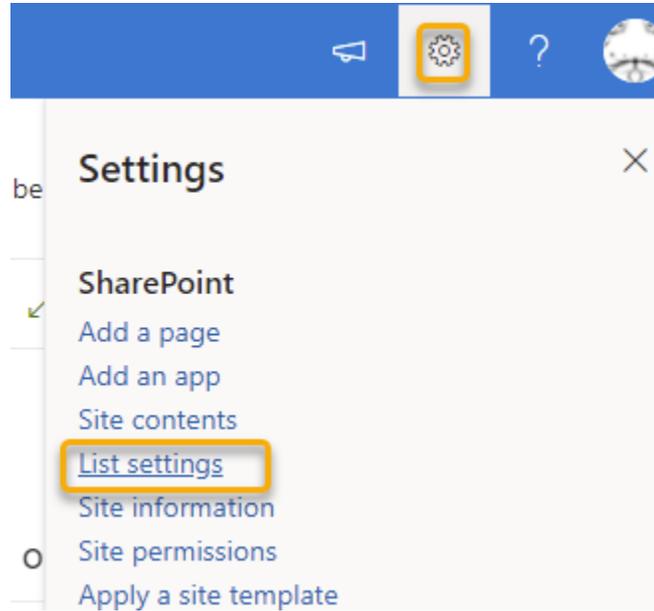
### ❖ 3.2.2. Add a Site Column to a List

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

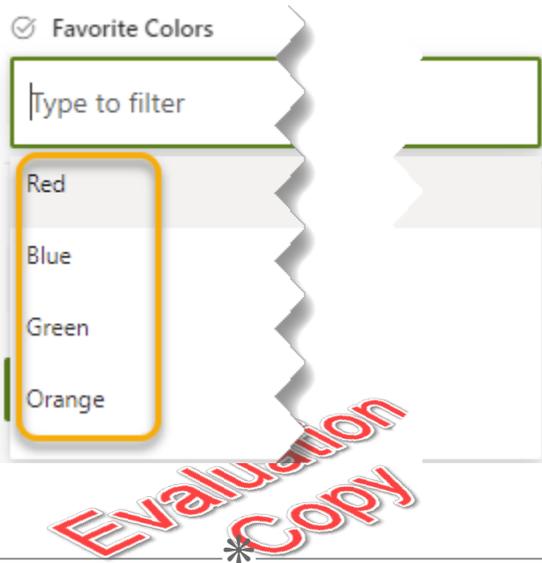
Description:  
None

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.

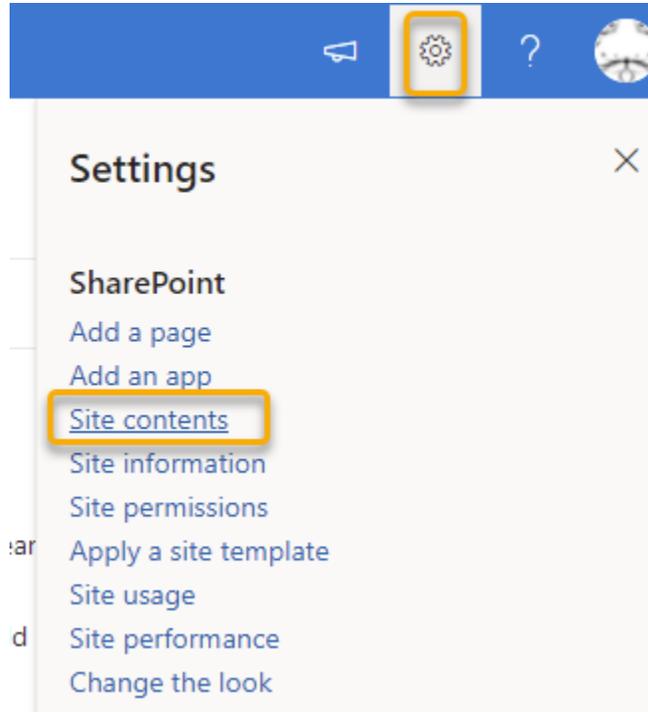


## 3.3. Site Content Type Gallery

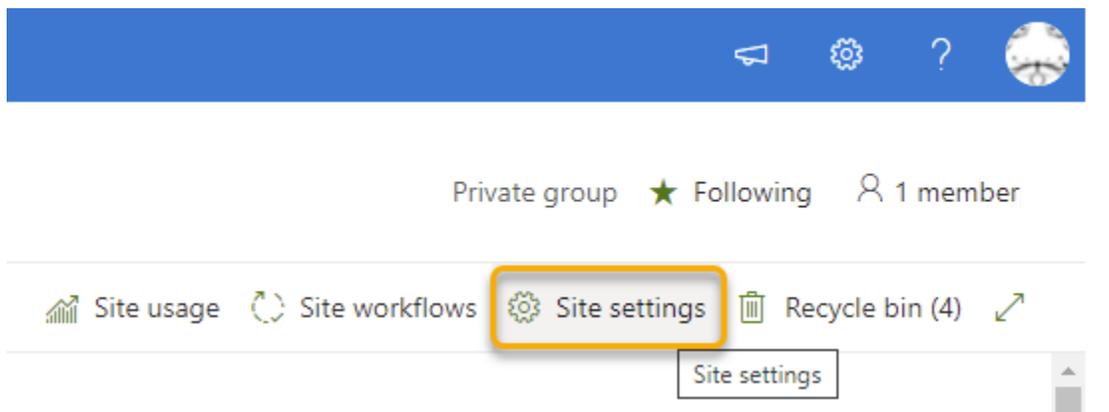
### ❖ 3.3.1. Explore the Site Content Types Gallery

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.

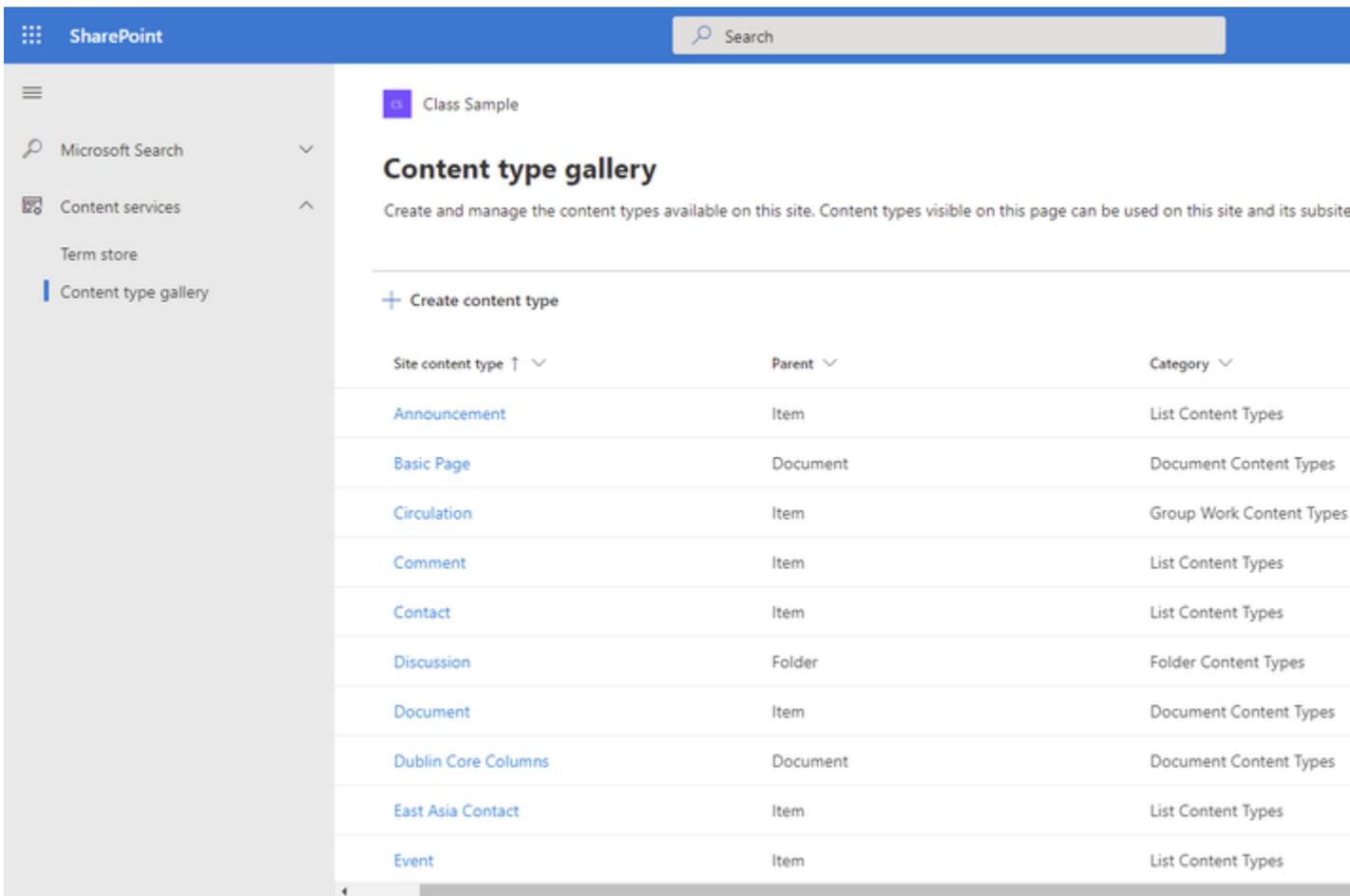


4. Click the **Site content types** link in the **Web Designer Galleries** group on the **Site Settings** page.

# 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.

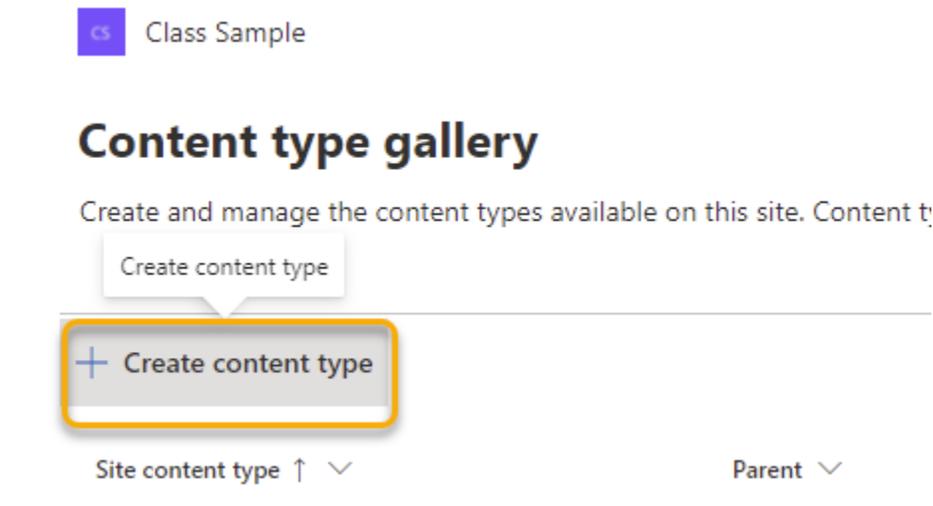


## 3.4. Creating Content Types

### ❖ 3.4.1. 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 ? User 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

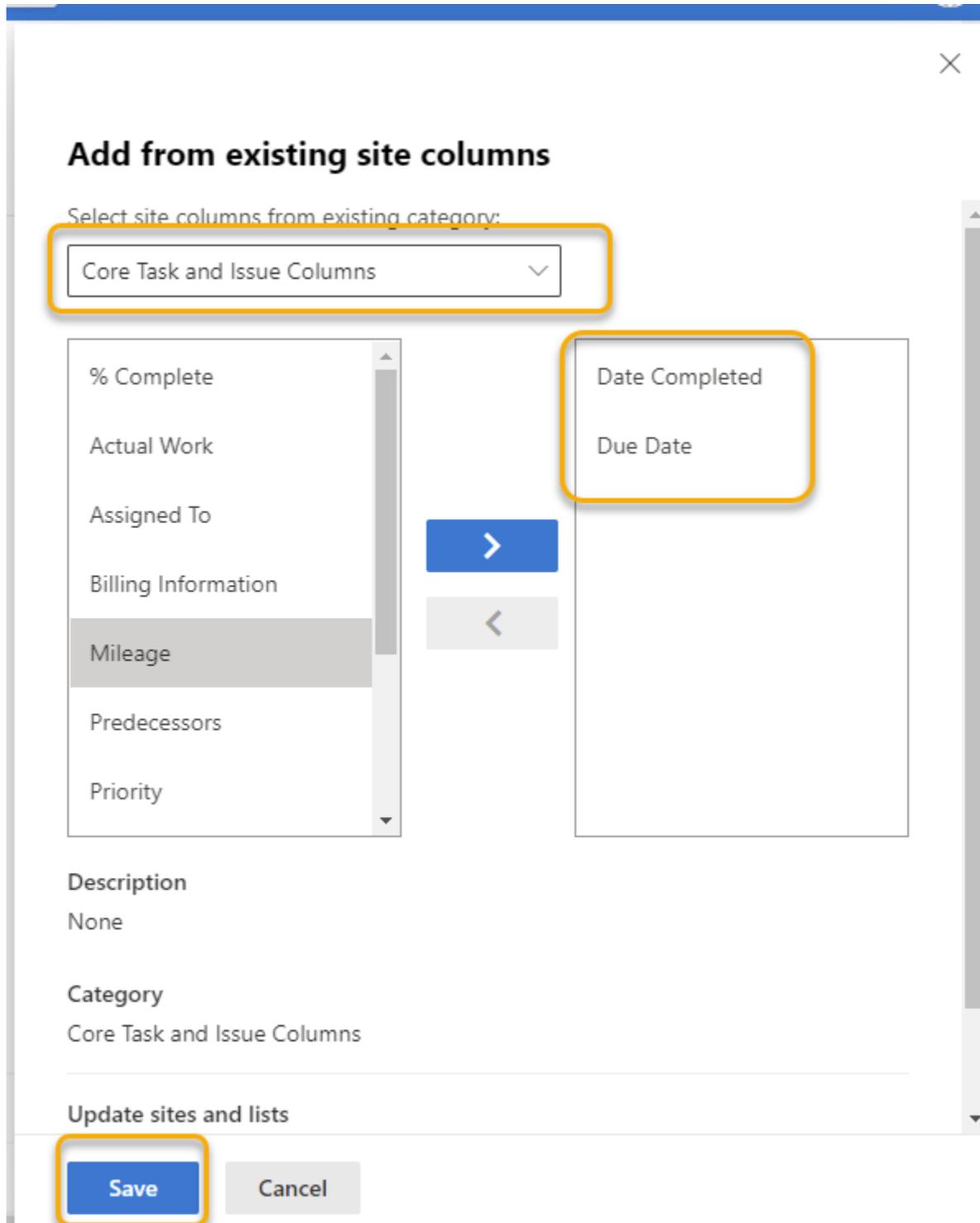
Add from existing site columns

Typ

Name

File

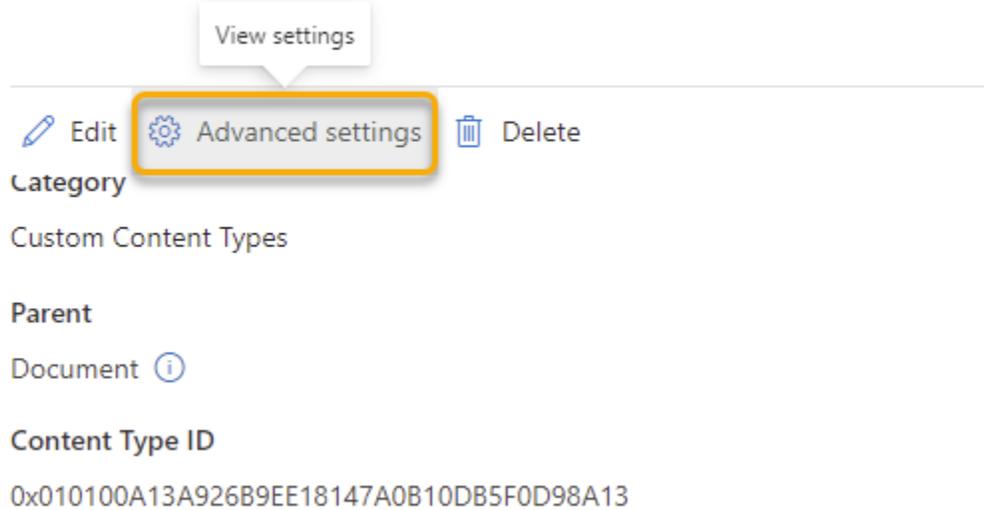
- B. In the **Add Columns to Content Type** form, select **Core Task and Issue Columns** in the **Select columns from** drop-down box. From the **Available columns** list box, choose both **Due Date** and **Date Completed**, and then click the **Add** button to add them to the **Columns to add** list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



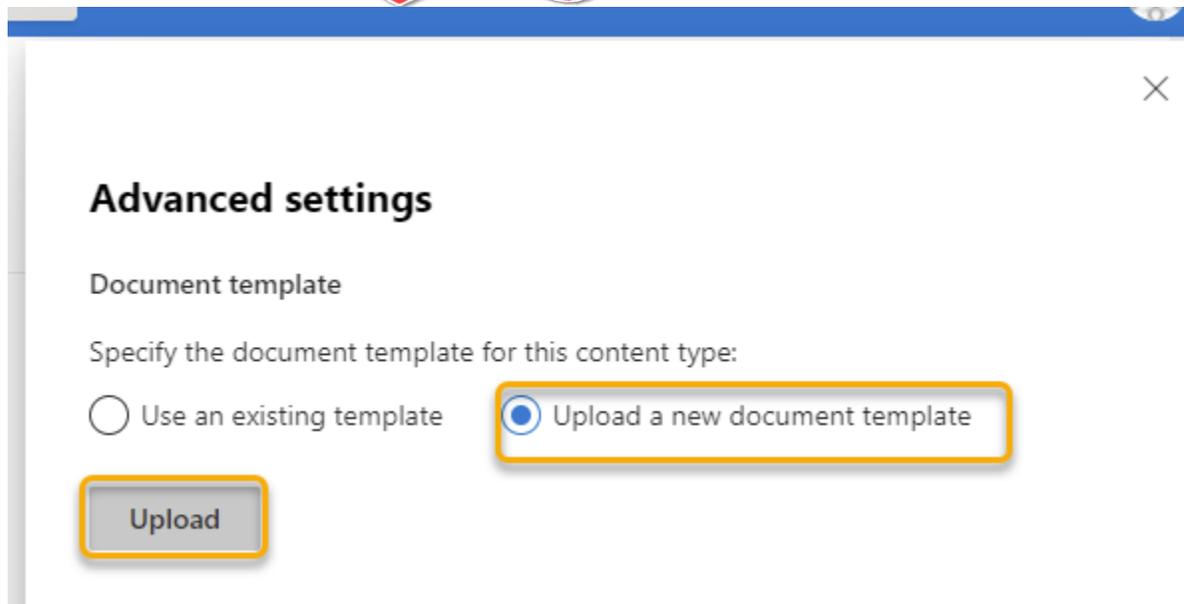
- C. Click the **Save** button to complete adding the site columns to the **Work Order** content type.

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

## Content type gallery > Work Order



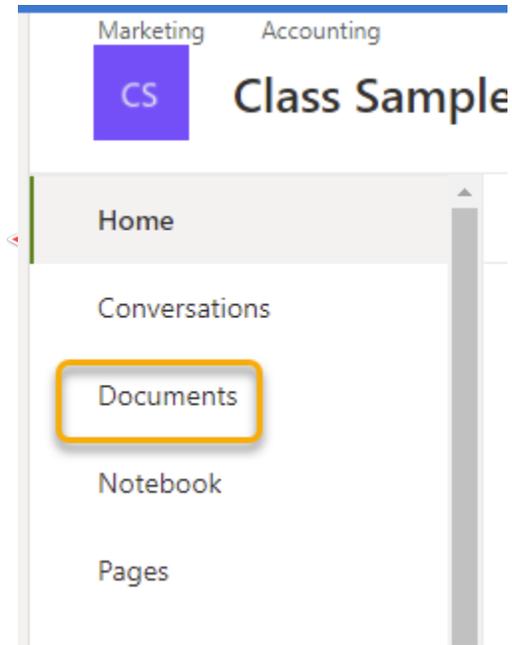
- B. Click the **Upload a new document template** option on the **Advanced Settings** page and then click the **Choose File** button to find the file.



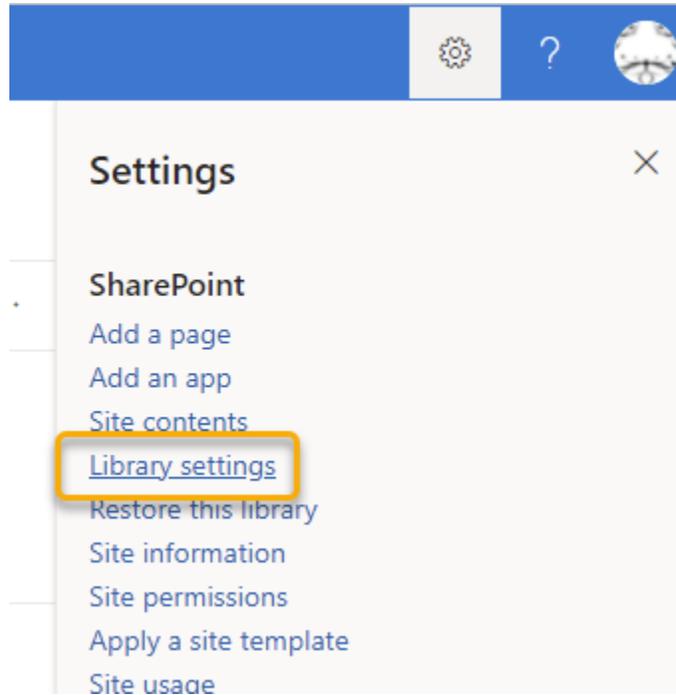
- C. Navigate to the folder you downloaded the class files to and select the Work\_Order.docx file. You may also choose a file of yours to use. Click the **Open** button

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.

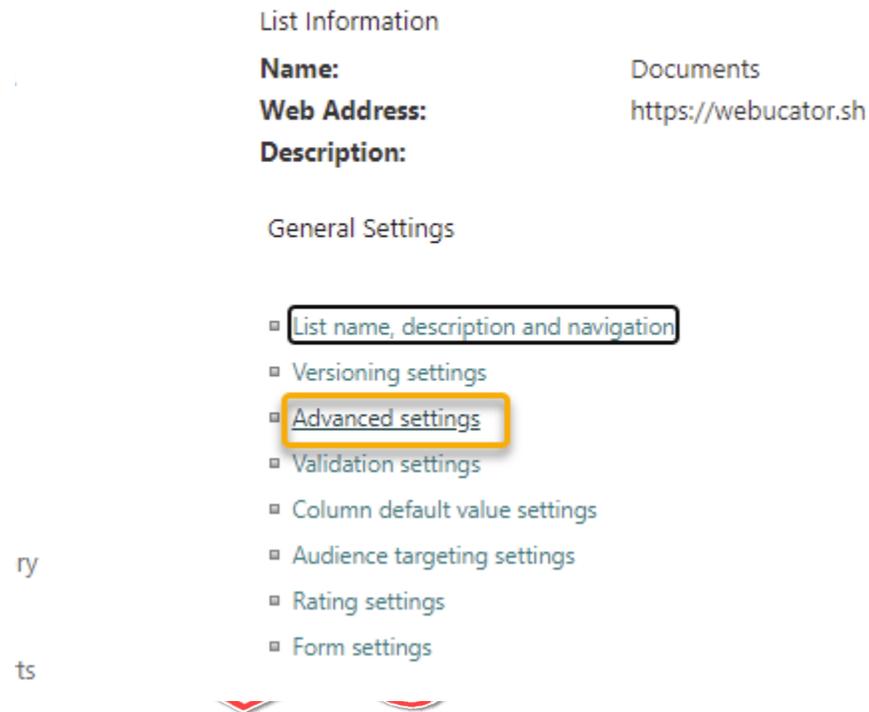


- B. Click the **Library Settings** on the **Settings**.



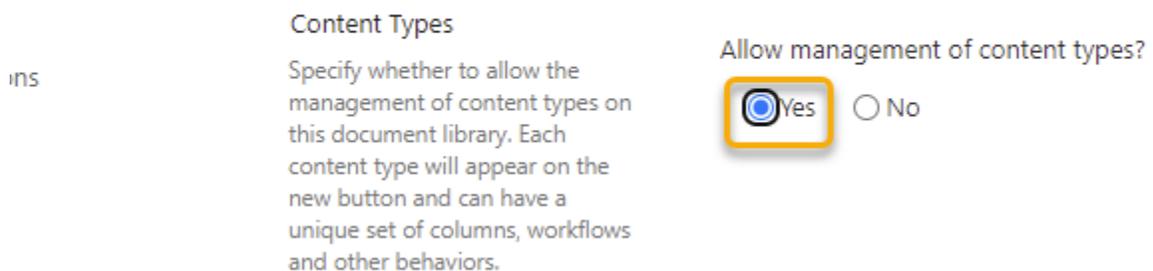
- C. Click the **Advanced Settings** link on the **Document Library Settings** page in the **General Settings** region.

# 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

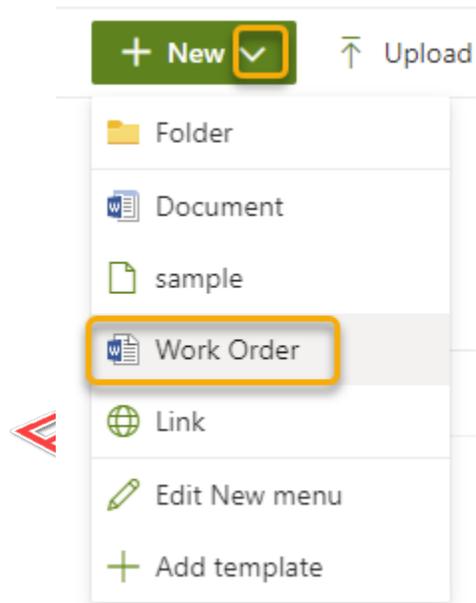


6. Add a new document to the **Document** library based on the **Work Order** content type.
  - A. Click the **Document** link in either the **Quick Launch** menu or the Site's **Breadcrumbs** to take you to the **Browse** view of the **Documents** library.

The screenshot shows a SharePoint site navigation area. On the left is a purple square with the letters "CS". To its right are links for "Marketing" and "Accounting", followed by an "EDIT LINKS" icon. The main breadcrumb trail consists of "Documents" (highlighted with an orange box) and "Settings". Below "Documents" is a dropdown menu with "Documents" selected. On the far left, a vertical menu lists "Home", "Conversations", "Documents", and "Notebook". On the right, a list item is shown with the following details:

<b>Name:</b>	Documents
<b>Web Address:</b>	https://webuc:
<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

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

# WORK ORDER

Details

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

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

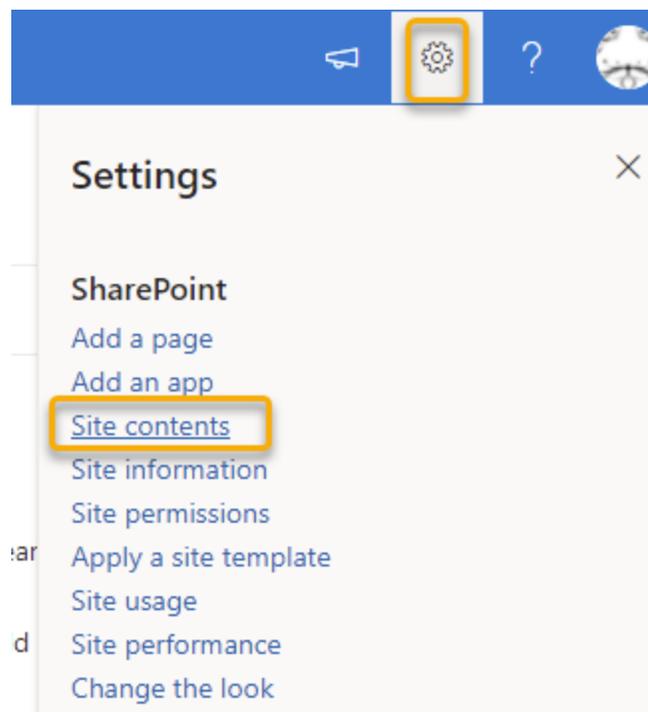
29 words English (U.S.) Text Predictions: On 100% Fit

# Exercise 3: 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.

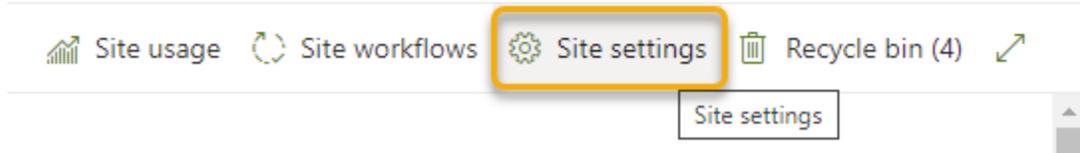
1. Create a new Content Type for the Sample Class Site.
  - A. Open your browser if it is not already open and navigate to your root team site.
  - B. Click the **Settings** menu and select the **Site Contents** link.



- C. Click **Site Settings**.

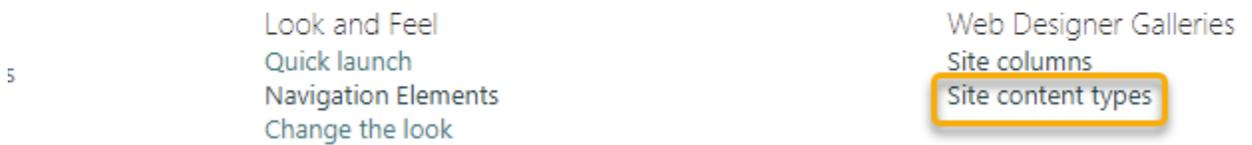


Private group ★ Following 👤 1 member



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

## Site Settings



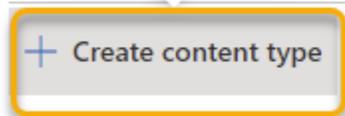
- E. Take a moment to read through the list of default content types. Note how they are grouped and there is a parent column that lists the parent content type of each individual content type.
- F. Click the **Create** link at the top of the list of content types.

Class Sample

### Content type gallery

Create and manage the content types available on this site. Content t

Create content type



Site content type ↑ ▾

Parent ▾

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

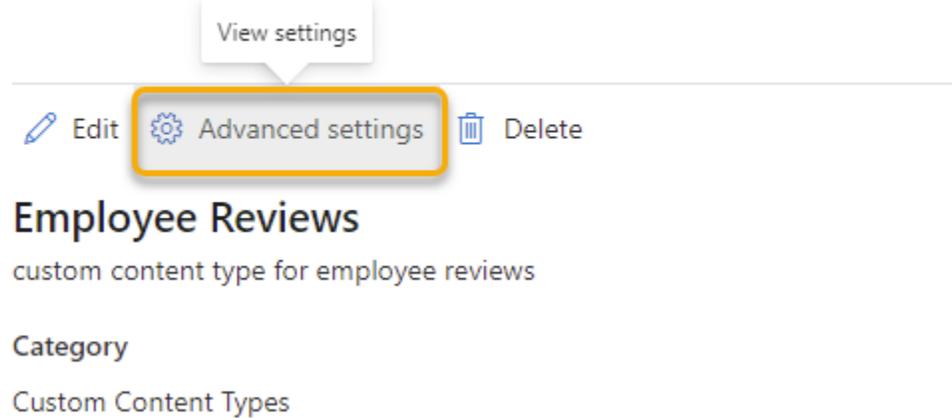
**Update sites and lists**

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

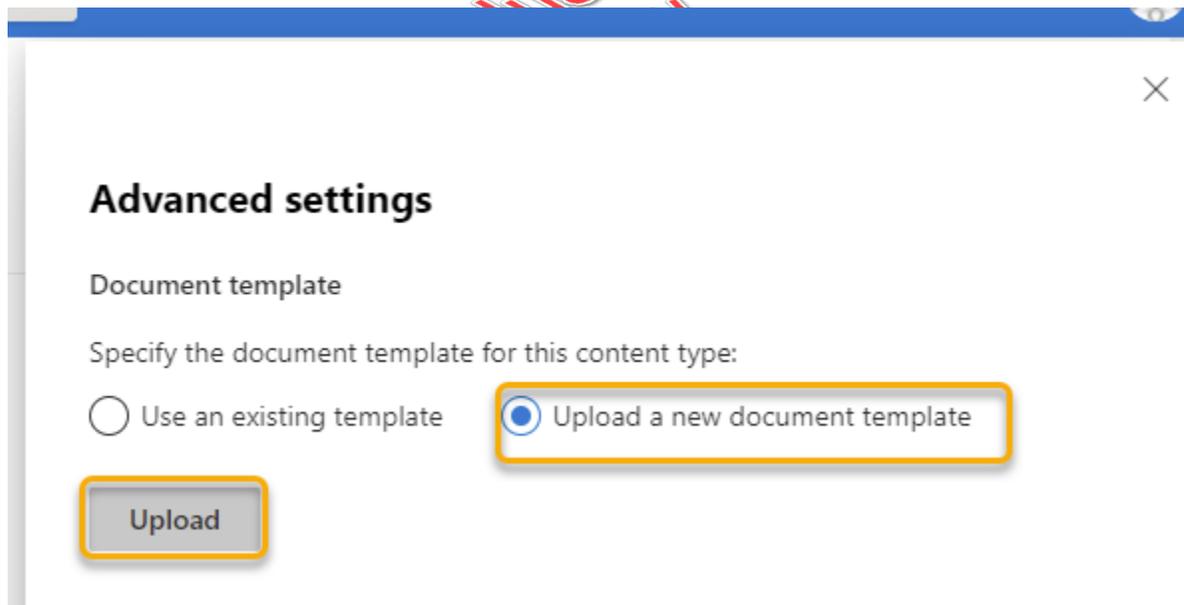
### Employee Reviews

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

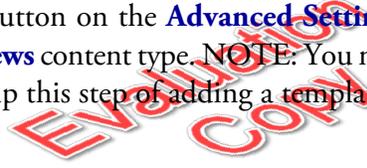
Specify the document template for this content type:

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.

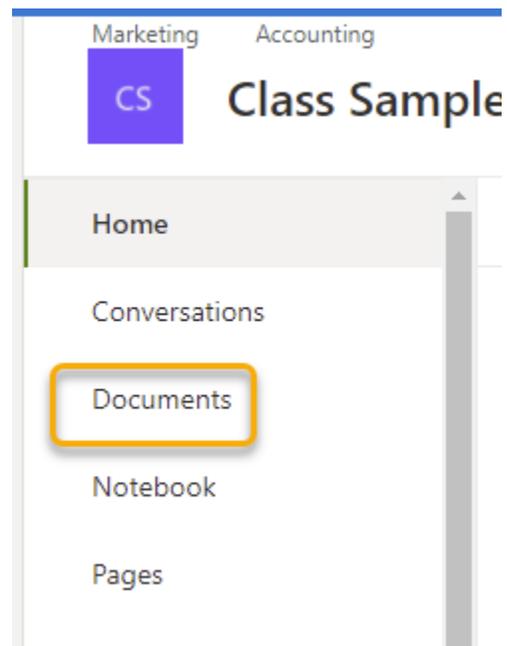


# Exercise 4: Adding a Content Type to a Library

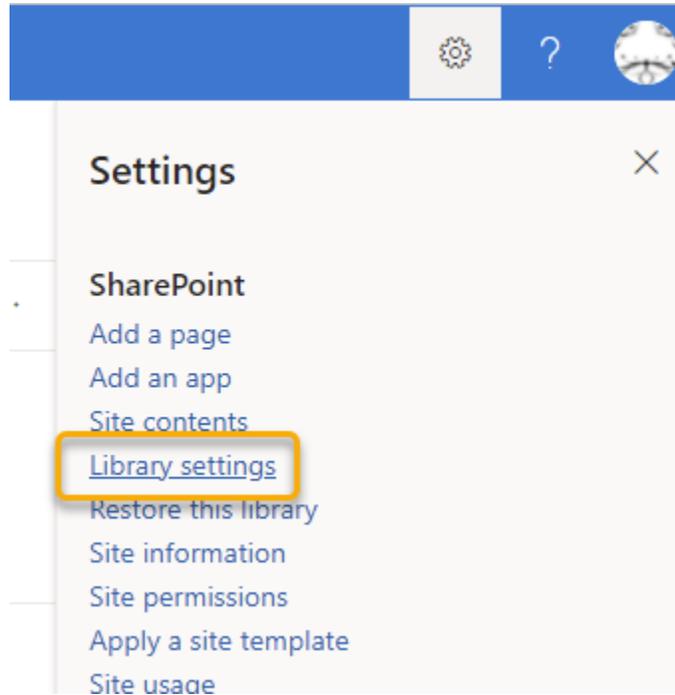
 10 to 15 minutes

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.

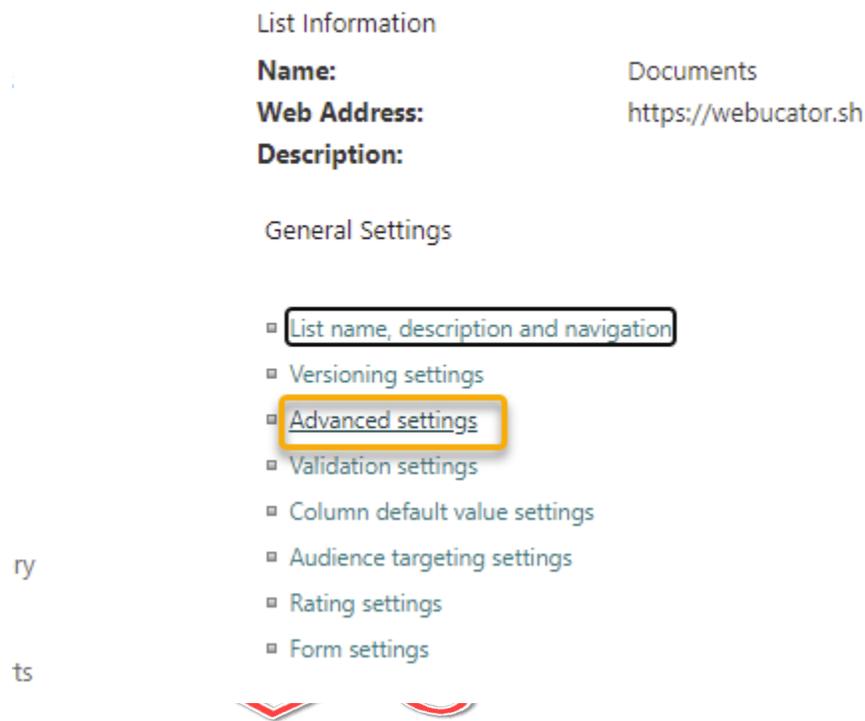


2. Click the **Library Settings** on the **Settings** .



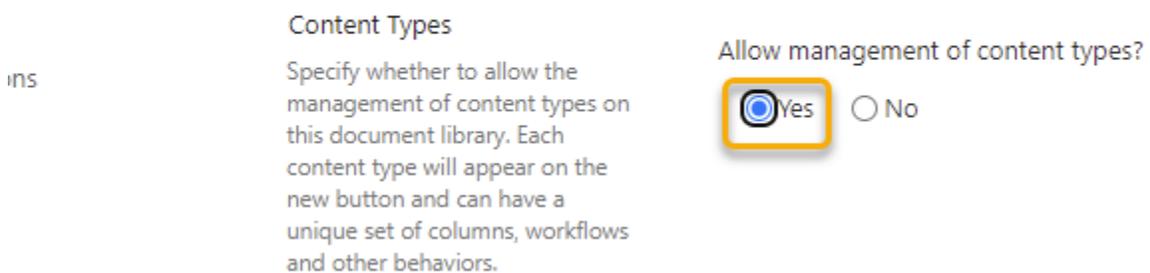
3. Click the **Advanced Settings** link on the **Document Library Settings** page in the **General Settings** region. NOTE: This step may not be needed if you had previously performed this task. Skip to step 6.

# Documents ▸ Settings



- 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



- 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	✓

- 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
------------------------	------

- 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.

Marketing Accounting EDIT LINKS

CS Documents Settings

Documents

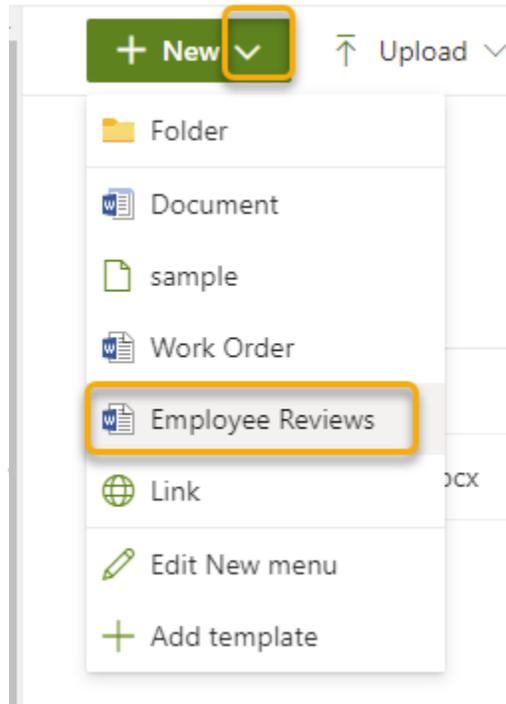
Home List Information

Conversations **Name:** Documents

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

Notebook **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 4

## Office Integration

---

### Topics Covered

- Creating an alert.

### Introduction

One of the nice features of SharePoint is its ability to integrate with Microsoft Office applications. Note that this chapter explores integration with Office Online products, a browser-based version of Office that allows you to create and modify office documents. There are limits and they do not perform exactly as their locally installed counterparts.

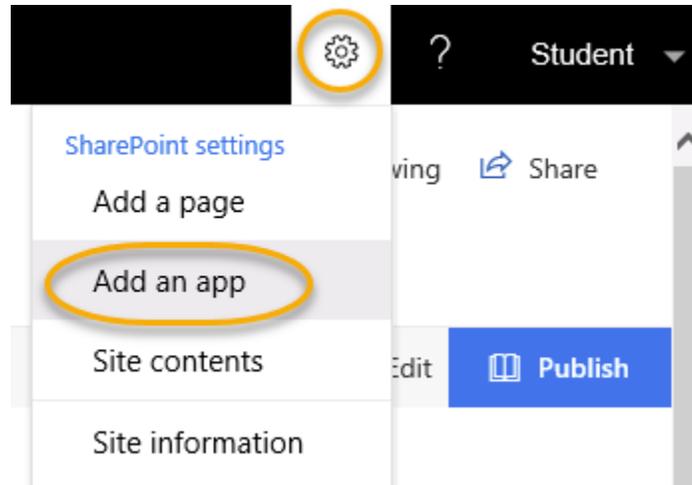


## 4.1. Excel Integration

### ❖ 4.1.1. Import Excel Spreadsheet to List

This walk-through will show you how to import data from an Excel spreadsheet and create a new SharePoint list.

1. Create a new list by using the **Import Spreadsheet** template.
  - A. Click the **Settings** menu and then choose the **Add an app** link.



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

## Site contents ▸ Your Apps

import

1 app matches your search [Newest](#) [Name](#)



- C. In the new list form that opens enter Golf Clubs in the **Name** field and List of golf clubs and their average loft angle and distances in the **Description** field.
- D. Click the **Browse** button to select the spreadsheet for the import.
- E. In the **Choose File to Upload** dialog window, browse to the folder you downloaded the class files to and select the club-specs.xlsx file. Click the **Open** button to close the dialog window and complete the selection.

Name and Description  
Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this list.

Name:

Description:  
List of golf clubs and their average loft and distances

Import from Spreadsheet  
Specify the location for the spreadsheet you want to use as the basis for this list.

File location:

- F. Click the **Import** button. This should open Microsoft Excel with the selected file loaded. A second dialog window titled **Import to Windows SharePoint Services list** should also open. In the **Range Type** drop-down, select **Named Range** and in the **Select Range** drop-down field choose **ClubData** from the list.

Import to Windows SharePoint Services list

Range Type:

Select Range:

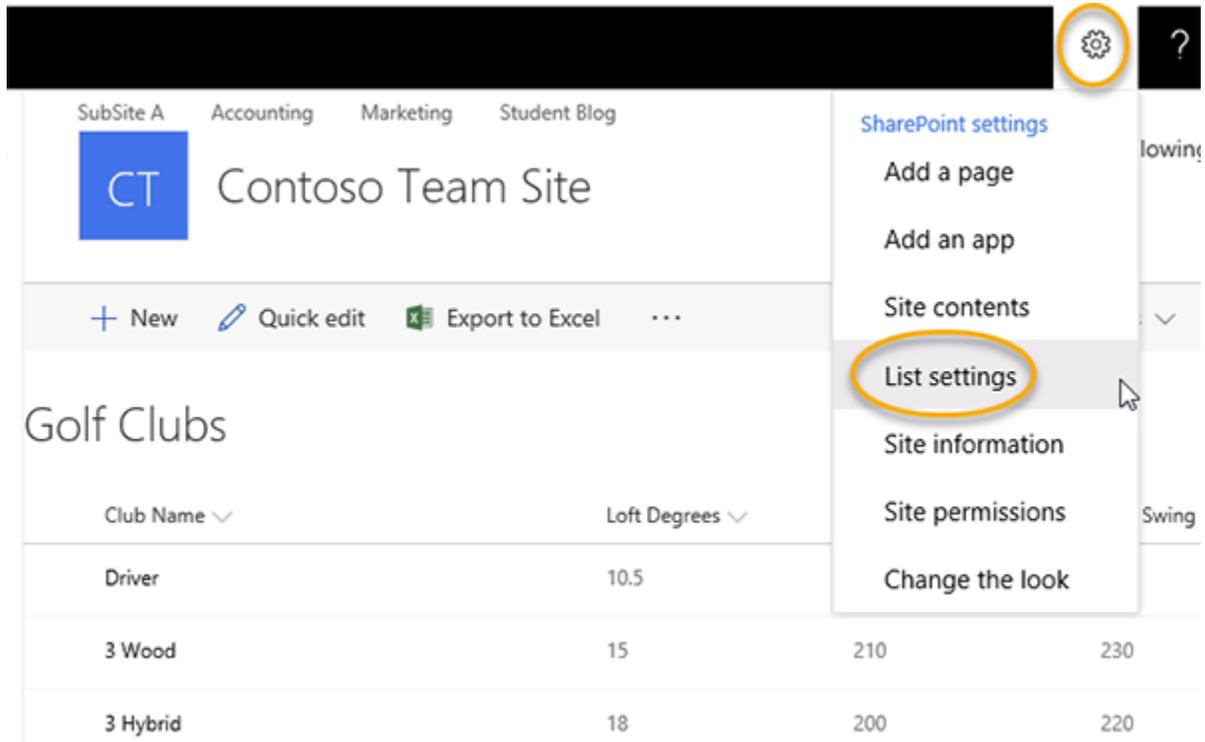
Import your spreadsheet data as a new Windows SharePoint Services list.

**Note**

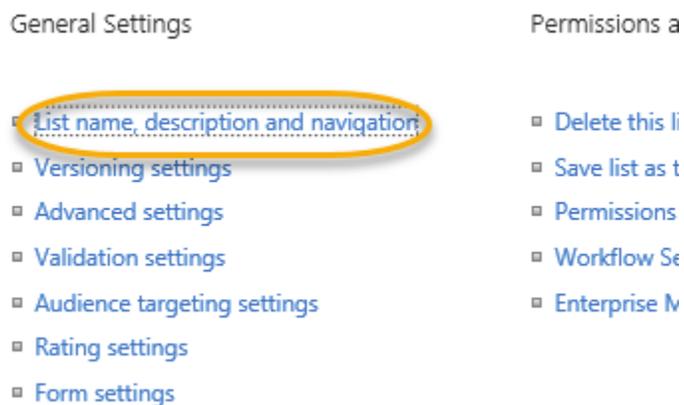
Optionally you could choose **Range of Cells** from the **Range Type** field. This would then allow you to use your mouse to click and drag across your spreadsheet selecting the range of cells to import. Having a named table as you do in this example makes it a bit easier to just select the table.

- G. Click the **Import** button to complete the import process.
2. Add the new imported list to the **Quick Launch** menu.

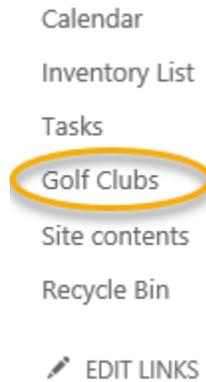
- A. Note how the new list “Golf Clubs” does not have a link in the **Quick Launch** menu. The **Import Spreadsheet** template you used does not have an option to add the list to the **Quick Launch** menu as part of the import and creation process.
- B. Click the **Settings** then **List Settings**.



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



- D. Click the **Yes** option under the section **Display this list on the Quick Launch?** and then click the **Save** button to save your changes.
- E. Note how now there is a new link **Golf Clubs** under the **Lists** group within the **Quick Launch** menu.



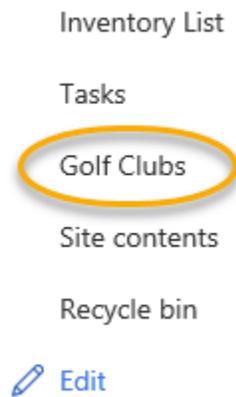
#### Note

The text for the link in the **Quick Launch** menu is based on the title of the list. The lists title can be changed on the **Site Settings** page using the same **List name, description, and navigation** link used to add the list to the **Quick Launch**.

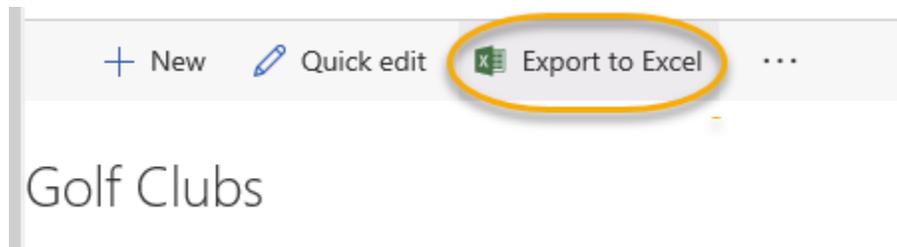
## ❖ 4.1.2. Export List Data to Excel

This walk-through will show you how to export the list data from the **Golf Clubs** list to an Excel spreadsheet. It does not matter that the data originally came from an Excel spreadsheet; you could perform these steps on any list. The walk-through does require that you have done the previous walk-through to create the **Golf Clubs** list.

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



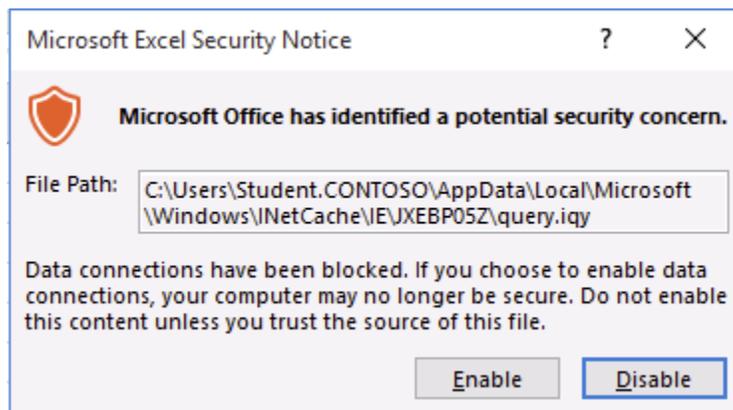
C. Click the **Export to Excel**.



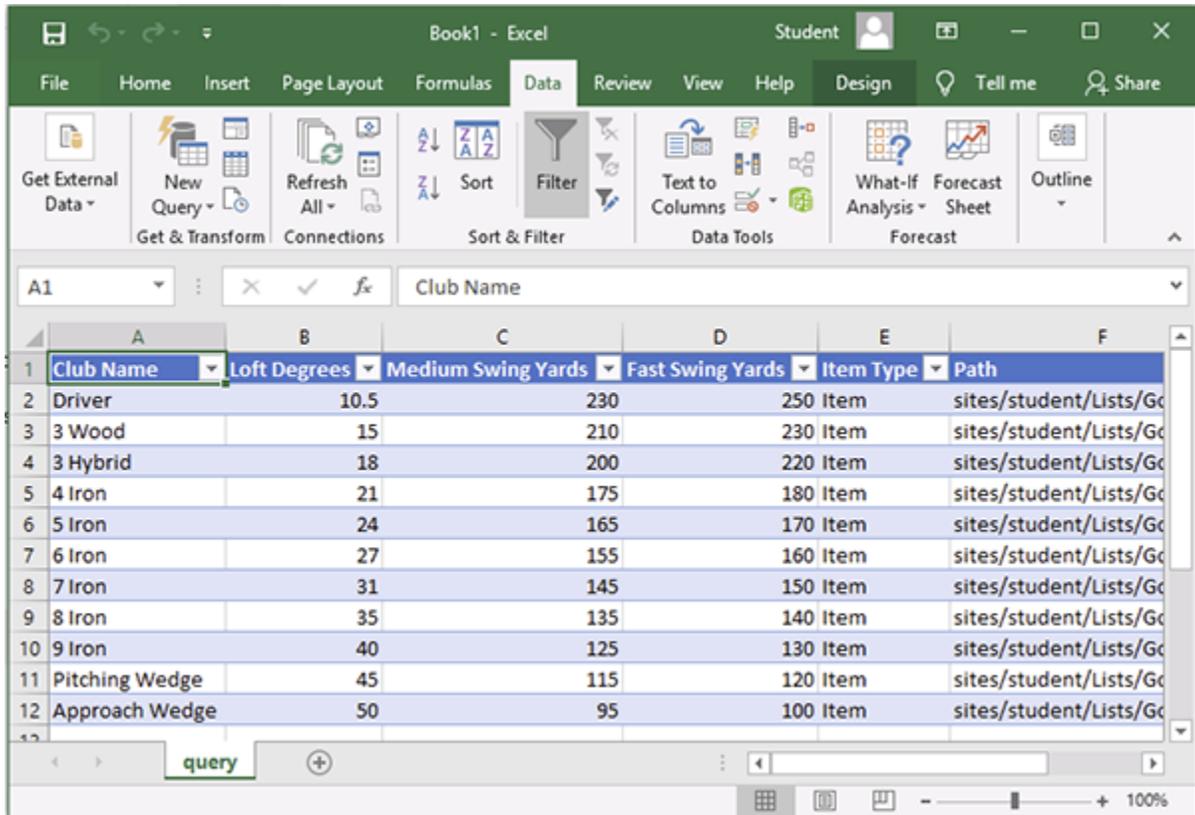
D. In the **Open or Save** dialog, click the **Open** button to open the `owssvr.iqy` file.



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



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



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

Driver

**Club Name**

Driver

**Loft Degrees**

10.5

**Medium Swing Yards**

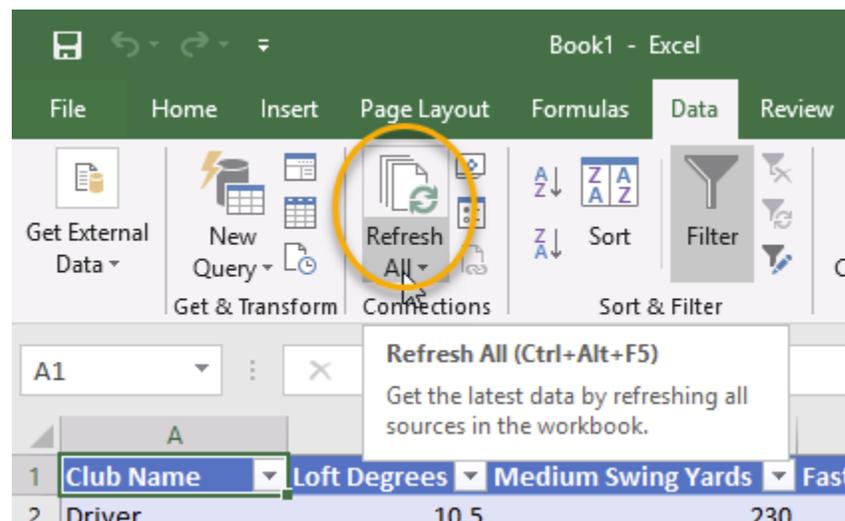
230

**Fast Swing Yards**

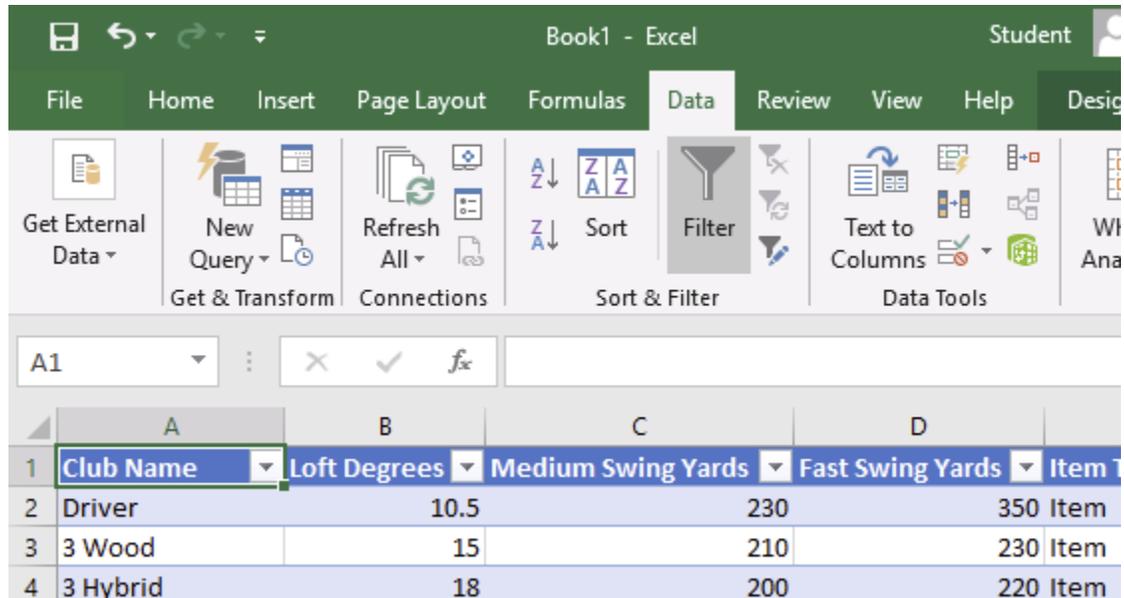
350

✓ Saved

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



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



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

Evaluation  
Copy

## 4.2. Outlook Integration

### ❖ 4.2.1. Create an Alert

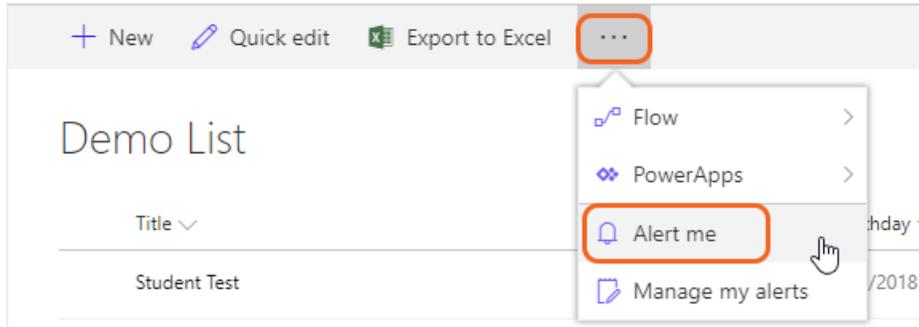
This walk-through will show you how to create an alert in the **Demo List** list to notify you when the list is changed. The demonstration requires that you have done the earlier demonstration that created the **Demo List** list. Please use any list you wish if you did not create a Demo List.

#### Email Server

This walk-through will work only if your SharePoint server is configured with an email server it can deliver to and the account you are logged in with has a valid email address.

1. Create an alert for the **Demo List** list.
  - A. Open your browser if it is not already open and navigate to your root team site.

- B. Click the **Demo List** link in the **Quick Launch** menu to navigate to the list. You may also open this list from **Site Contents**.
- C. Click the **Alert Me** in the **more** drop-down.



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

## Alert me when items change

**Alert Title**  
Enter the title for this alert. This is included in the subject of the notification sent for this alert.

**Send Alerts To**  
You can enter user names or e-mail addresses. Separate them with semicolons.

**Delivery Method**  
Specify how you want the alerts delivered.

**Change Type**  
Specify the type of changes that you want to be alerted to.

**Send Alerts for These Changes**  
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

**When to Send Alerts**  
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

**Alert Title**  
Demo List

**Users:**  
[User selection box]

**Send me alerts by:**

- E-mail [Email address: benny@redbus.com@microsoft.com]
- Text Message (SMS) [Text message box]
- Send URL in text message (SMS)

**Only send me alerts when:**

- All changes
- New items are added
- Existing items are modified
- Items are deleted

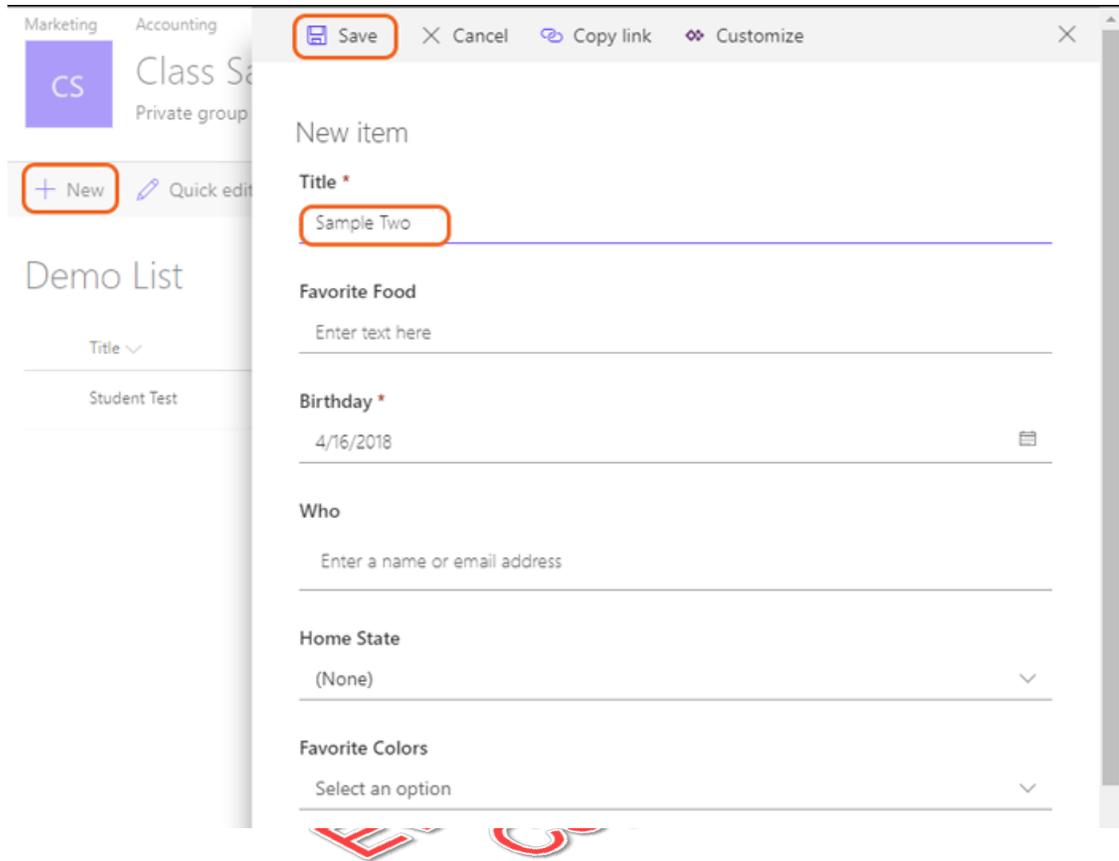
**Send me an alert when:**

- Anything changes
- Someone else changes an item
- Someone else changes an item created by me
- Someone else changes an item last modified by me

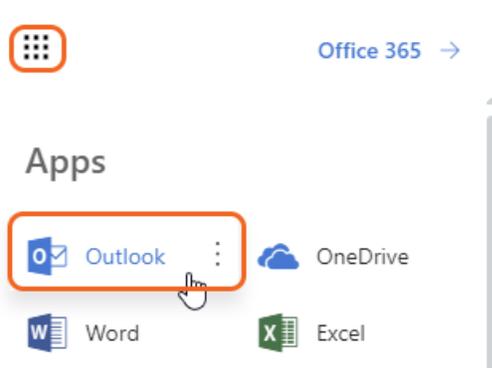
**Send notification immediately**  
 Send notification immediately  
 Send a daily summary  
 Send a weekly summary

**Time:**  
Monday 8:00 AM

2. Add a new **Demo list** item to the list to test the new alert.
  - A. Click the **new** link at the top of the list. Enter sample data and click the **Save** button.



3. Check for an alert in Microsoft Outlook Online.
  - A. Launch Microsoft Outlook Online.



- B. You will eventually have two emails in your **Inbox** generated by the alert system. It could take up to 10 minutes for them to appear due to a delay in the SharePoint service responsible for generating emails even with the alert option set to **Send notification immediately**.

## Inbox

Filter ▾

Next: No events for the next two days.

 Agenda

**Demo List - Sample Two**

**Class Sample**

12:05 PM

Sample Two has been added Tracy Berry 4/16/2018 9:04 AM Title: Sample Two Birthday: 4...

**You have successfully created an alert for 'Demo List'**

**Class Sample**

12:01 PM

Alert 'Demo List' has successfully been added on 'Class Sample'. You will receive alerts acco...

Updates from All Company

# Exercise 5: Excel Integration

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

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

Contoso Contacts

Contoso Discussion

Calendar

Inventory List

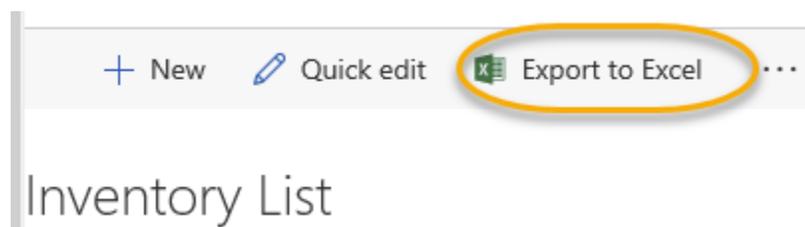
Tasks

Golf Clubs

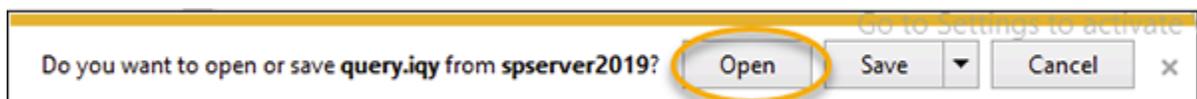
## Note

If **Inventory List** is not listed under the **Recent** group in the **Quick Launch** menu it might be listed under **Site Contents**. The **Recent** list only displays the last five lists or libraries created.

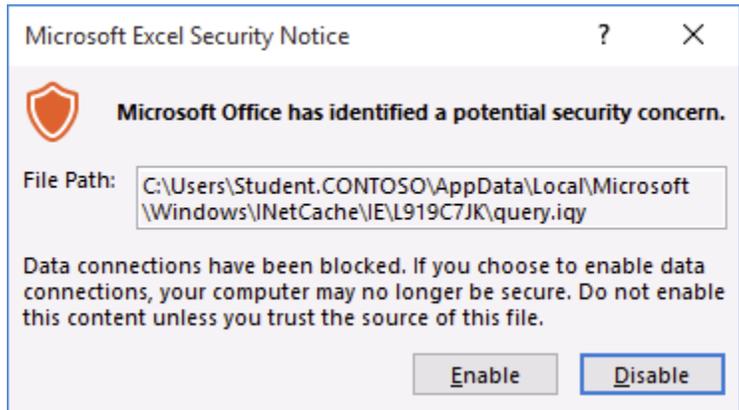
- C. Click the **Export to Excel** in the toolbar.



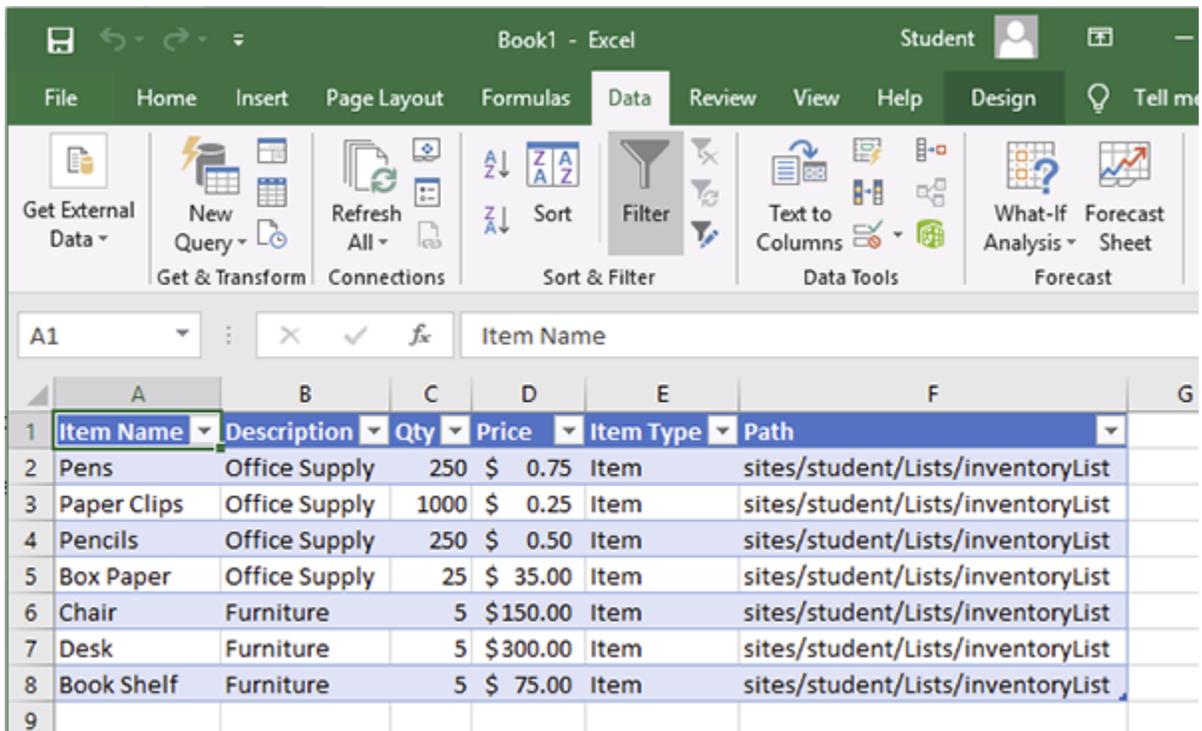
- D. In the **Open or Save** dialog, click the **Open** button to open the `owssvr.iqy` file.



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



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



- 2. Update the **Inventory List** list data and sync the updates to the linked Excel spreadsheet.
  - A. Go back to your browser window with the **Inventory List** list **All Items** view showing.

- B. Click the **Pens** link to open the item's properties form.



Pens

**Item Name \***

[Pens](#)

---

**Description**

Office Supply

**Qty**

250

**Price**

\$0.75

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

Pens

**Item Name \***

[Pens](#)

**Description**

Office Supply

**Qty**

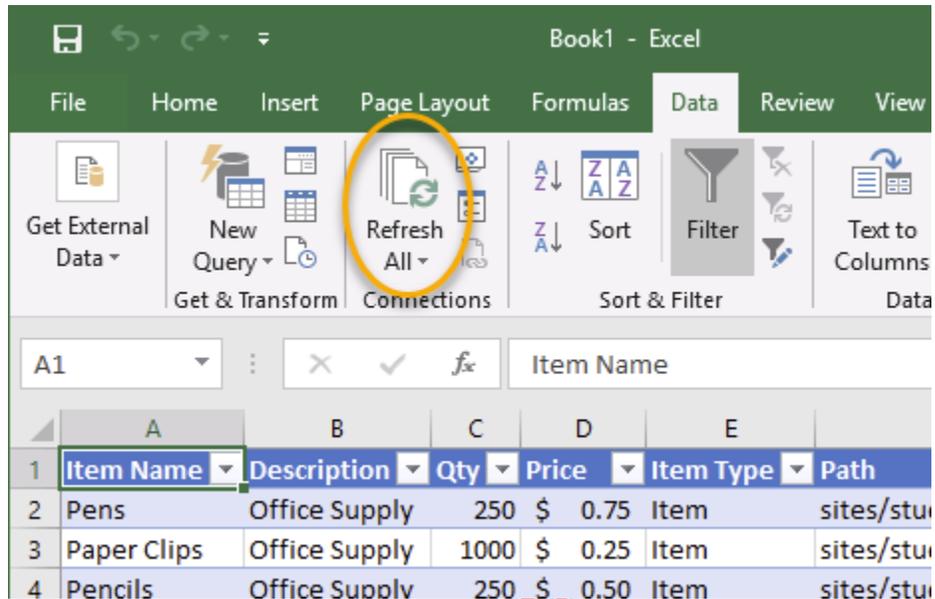
300

---

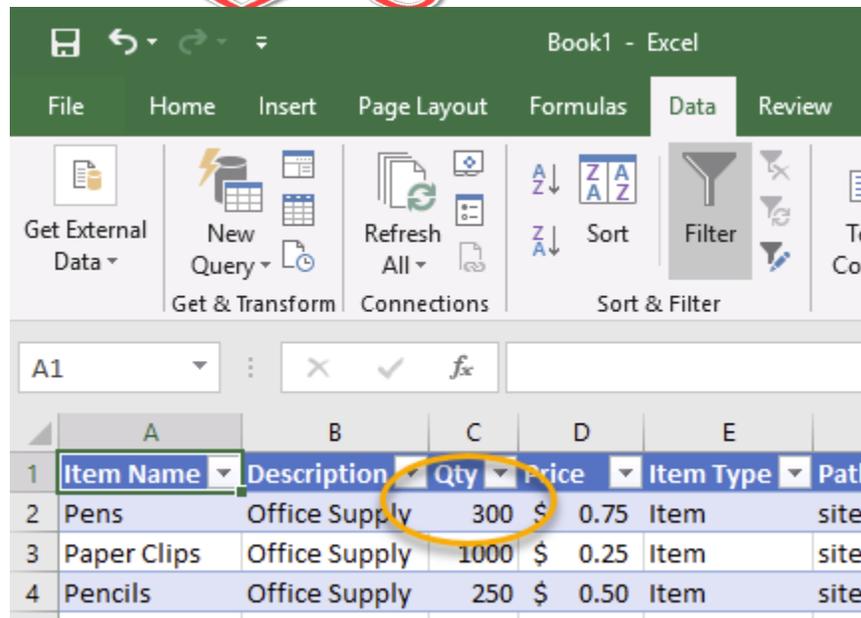
**Price**

\$0.75

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



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



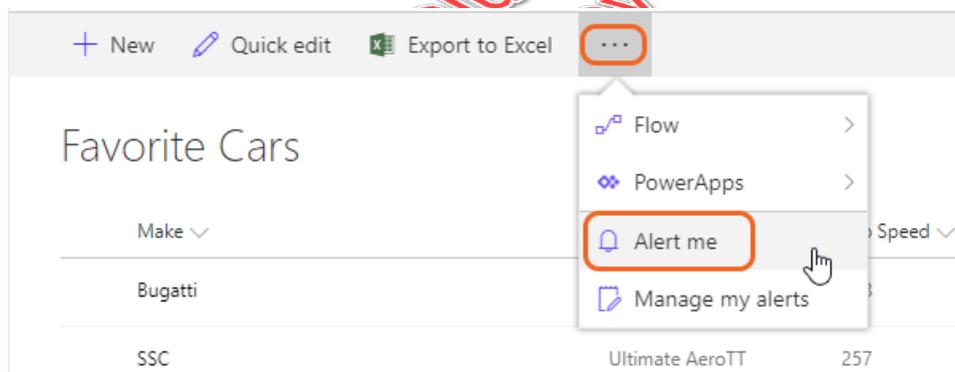
- G. Close Microsoft Excel and click **Don't Save** when asked if you want to save the changes to 'Book1'.

# Exercise 6: Outlook Integration

 15 to 25 minutes

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

1. Create an alert for the **Favorite Cars List** list.
  - A. Open your browser if it is not already open and navigate to your root team site.
  - B. Click the **Favorite Cars List** link in the **Quick Launch** menu to navigate to the list. You may also open this list from **Site Contents**.
  - C. Click the **Alert Me** in the **more** drop-down.



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

## Alert me when items change

**Alert Title**  
Enter the title for this alert. This is included in the subject of the notification sent for this alert.

**Send Alerts To**  
You can enter user names or e-mail addresses. Separate them with semicolons.

Users:

**Delivery Method**  
Specify how you want the alerts delivered.

Send me alerts by:

E-mail

Text Message (SMS)

Send URL in text message (SMS)

**Change Type**  
Specify the type of changes that you want to be alerted to.

Only send me alerts when:

All changes

New items are added

Existing items are modified

Items are deleted

**Send Alerts for These Changes**  
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:

Anything changes

Someone else changes an item

Someone else changes an item created by me

Someone else changes an item last modified by me

**When to Send Alerts**  
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

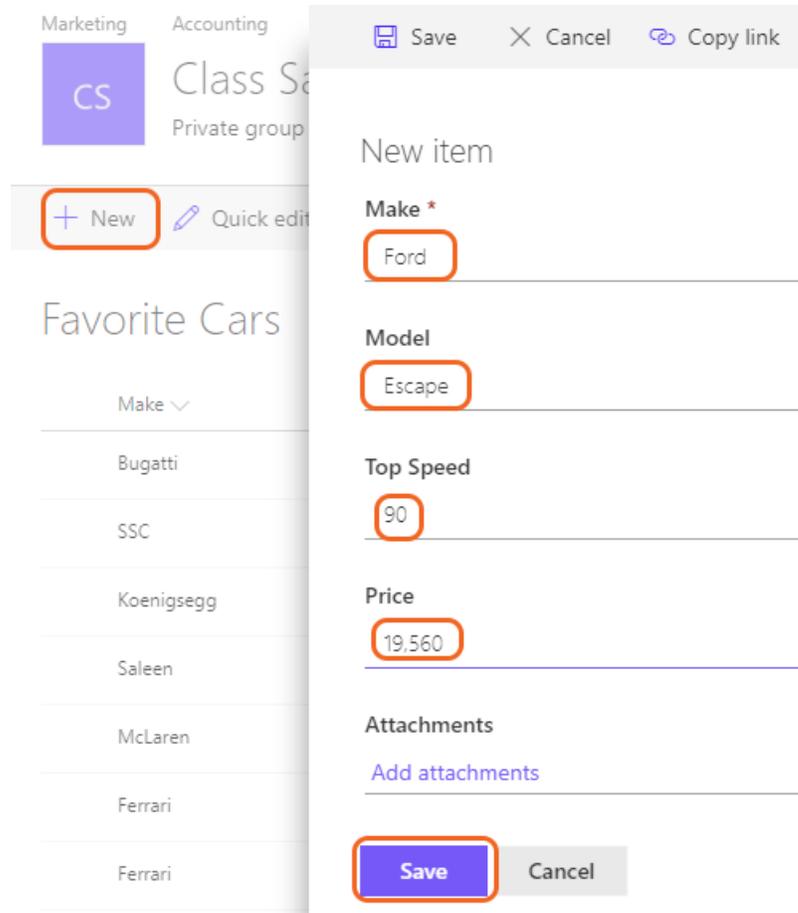
Send notification immediately

Send a daily summary

Send a weekly summary

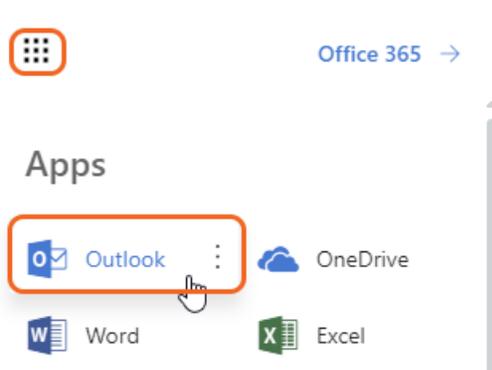
Time:

2. Add a new **Favorite Cars list** item to the list to test the new alert.
  - A. Click the **new** link at the top of the list. Enter sample data and click the **Save** button.



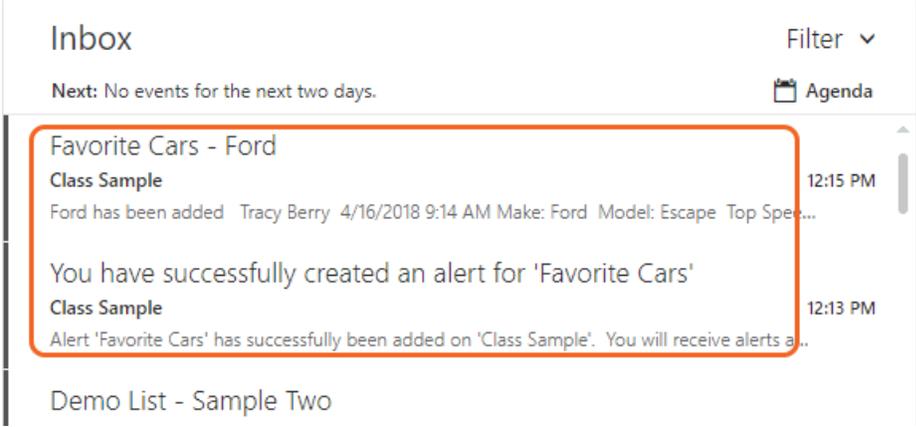
3. Check for an alert in Microsoft Outlook Online.

A. Launch Microsoft Outlook Online.



B. You will eventually have two emails in your **Inbox** generated by the alert system. It could take up to 10 minutes for them to appear due to a delay in the SharePoint

service responsible for generating emails even with the alert option set to **Send notification immediately**.



## Conclusion

In this lesson, you have learned to integrate SharePoint 365 with Microsoft Office applications.



# LESSON 5

## 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.

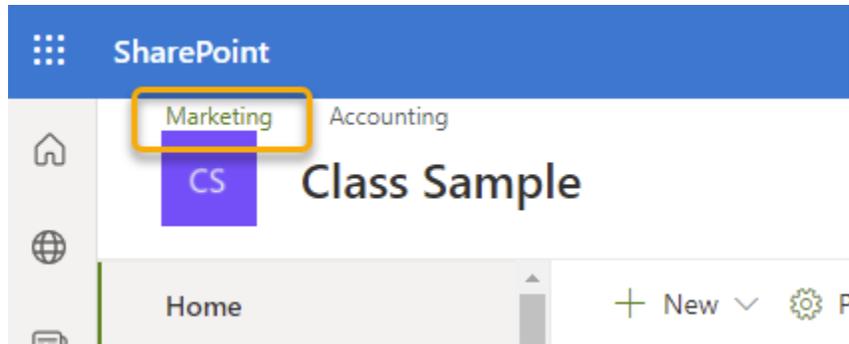


## 5.1. SharePoint Groups

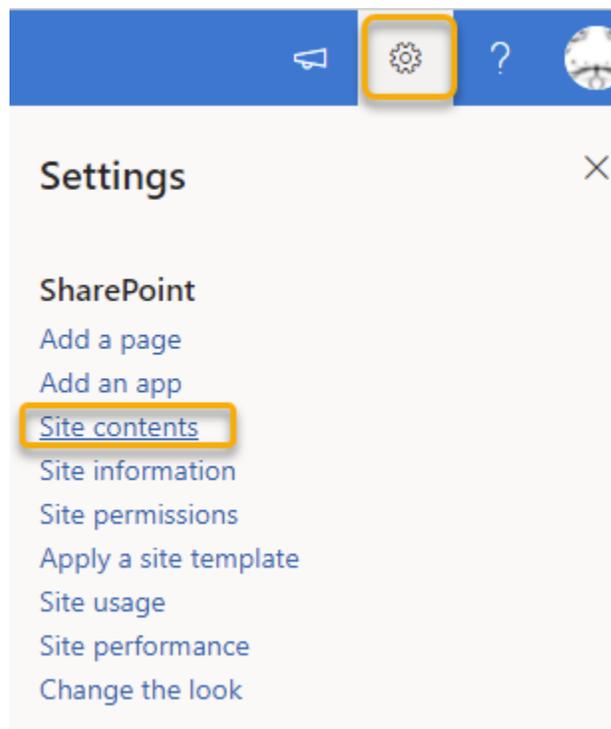
### ❖ 5.1.1. View the Default SharePoint Groups

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.

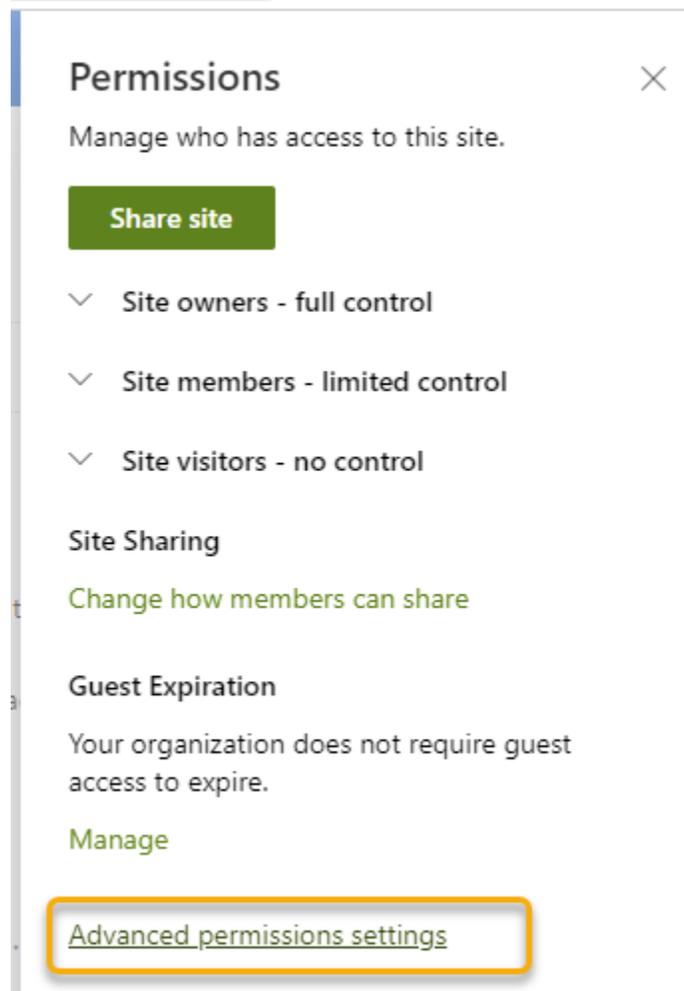
1. Make sure your browser is open to the **Marketing** site.



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.

CS Marketing Accounting  
People and Groups ▸ Class Sample Visitors

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.

CS Marketing Accounting  
People and G

- Groups**
- Class Sample Members
- Class Sample Visitors
- Class Sample Owners

New ▾

There are no i

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)

Class Sample Members

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

New Group

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



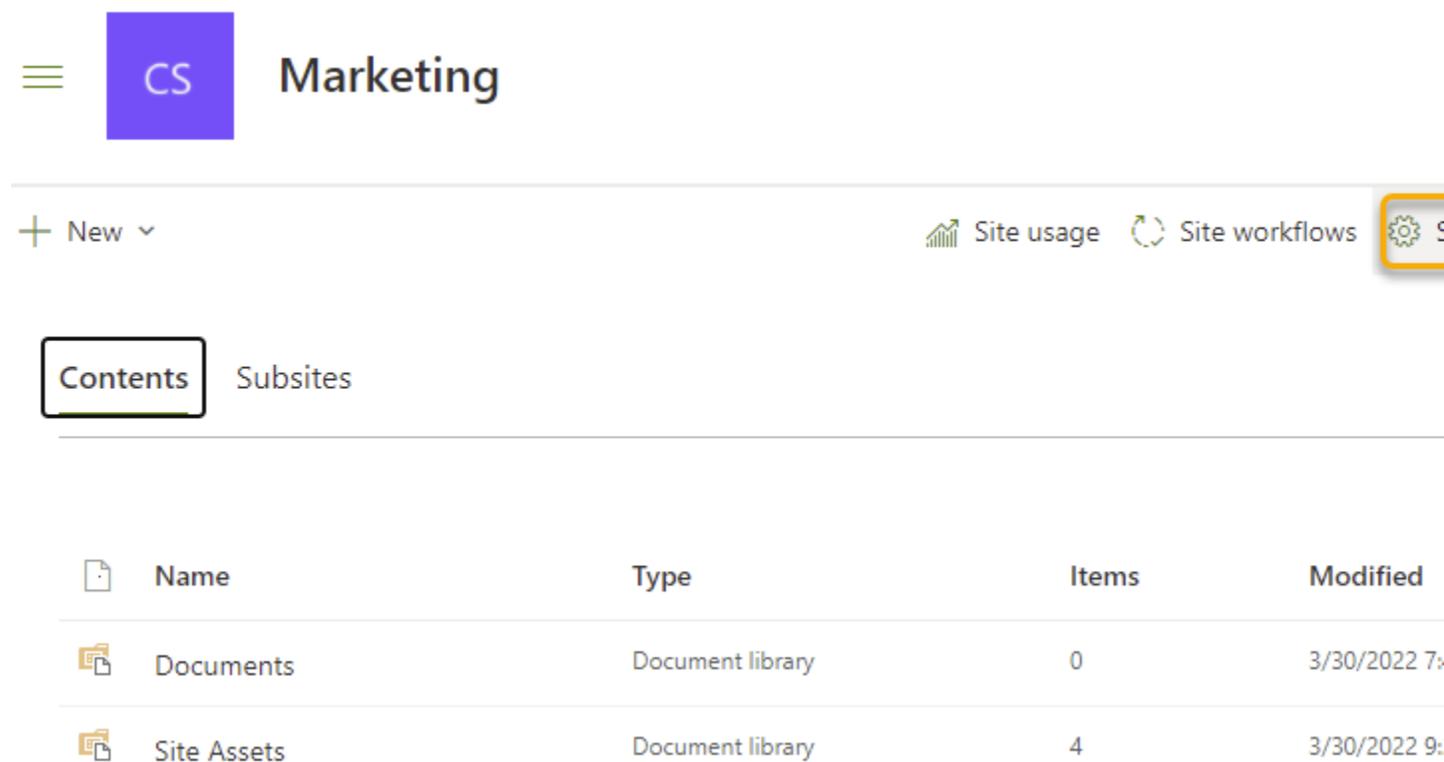
## 5.2. Assigning Permissions

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.

### ❖ 5.2.1. 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.

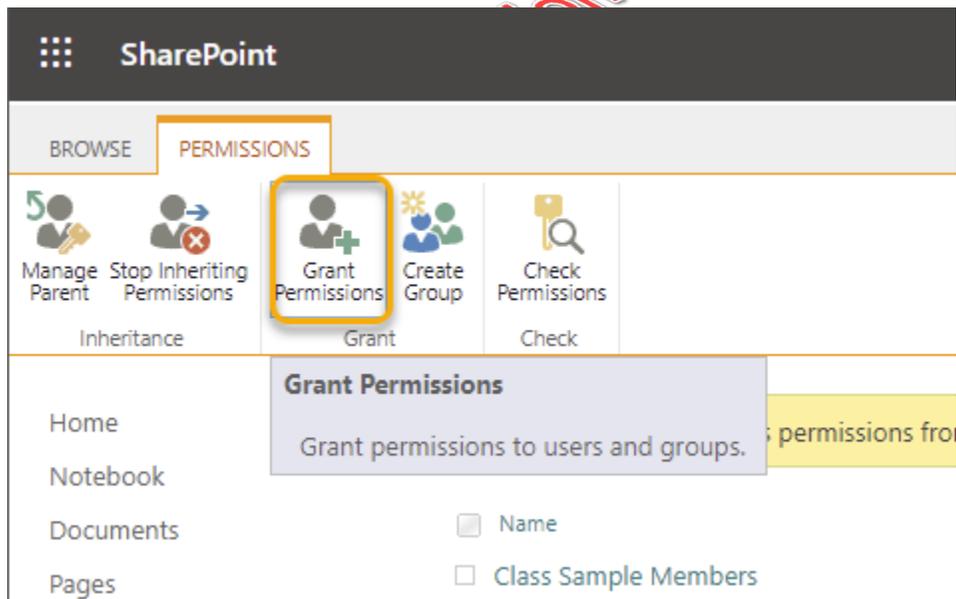


Marketing Accounting  
Site Settings

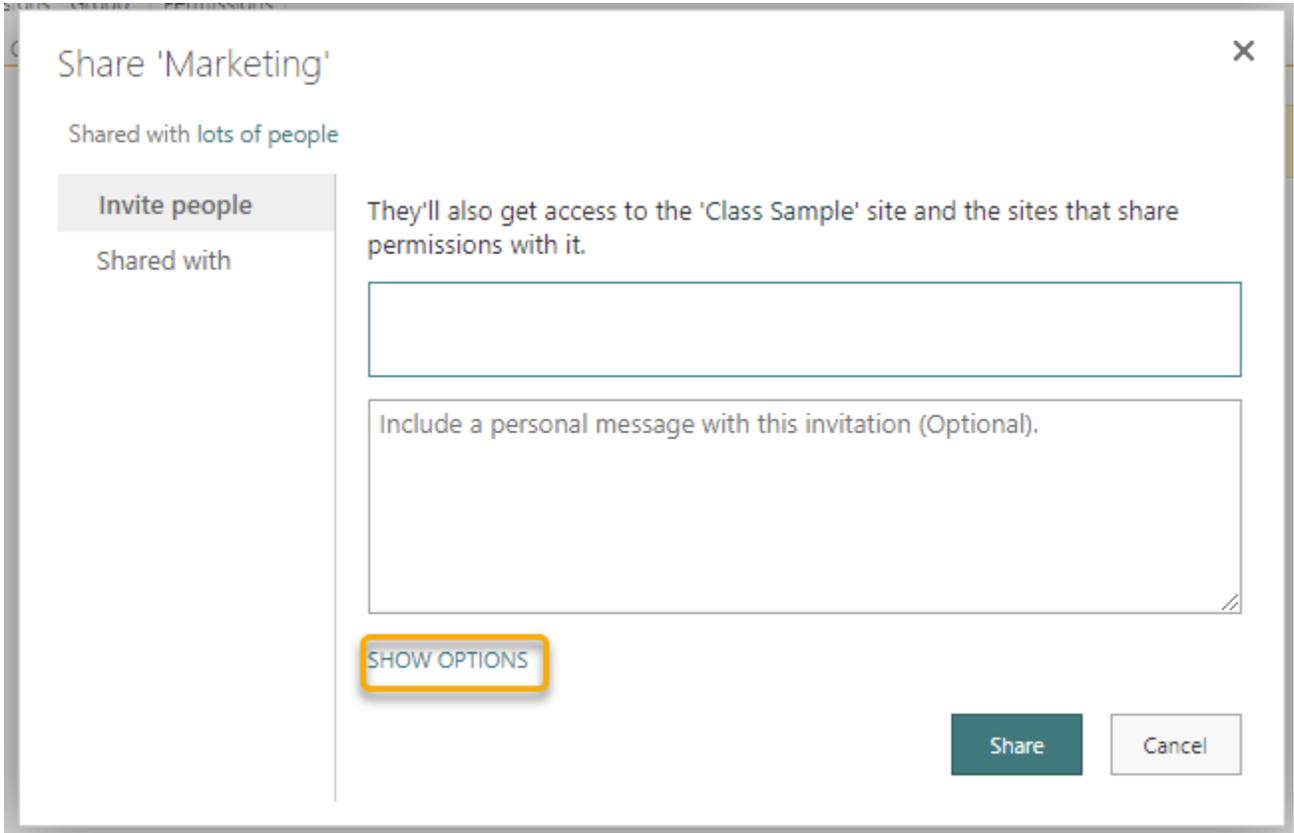
- Home
- Notebook
- Documents
- Pages
- Site contents
- Users and Permissions
  - People and groups
  - Site permissions**
  - Site app permissions
- Web Designer Galleries
- Site columns
- Look and Feel
  - Title, description, and logo
  - Quick launch
  - Top link bar
  - Change the look

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

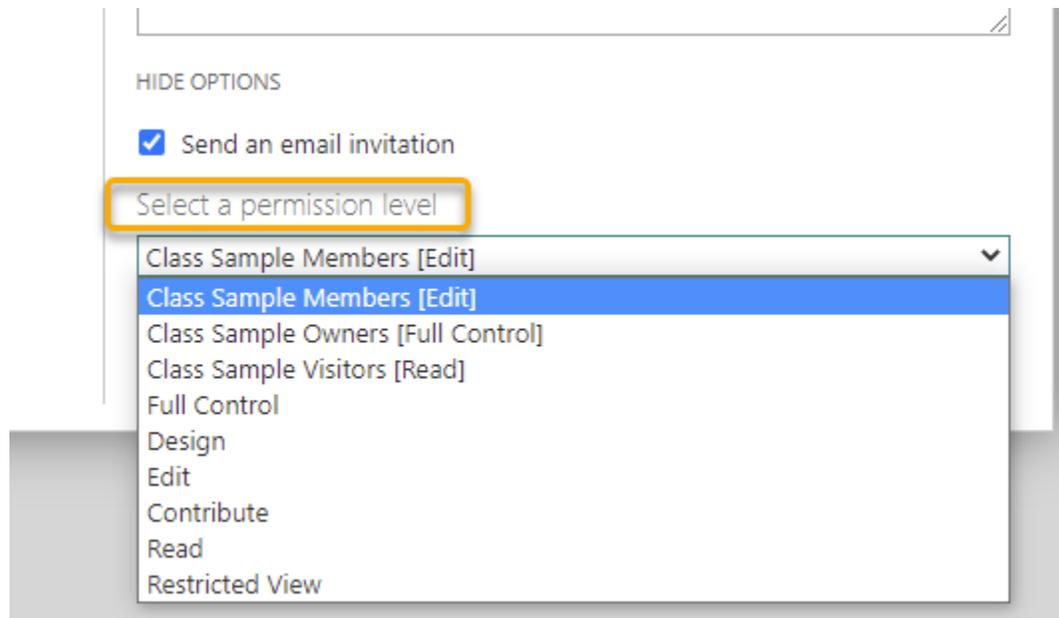
4. Click the **Grant Permission** link button from the **PERMISSIONS** tab toolbar.



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.



---

\*

## 5.3. Permissions Inheritance

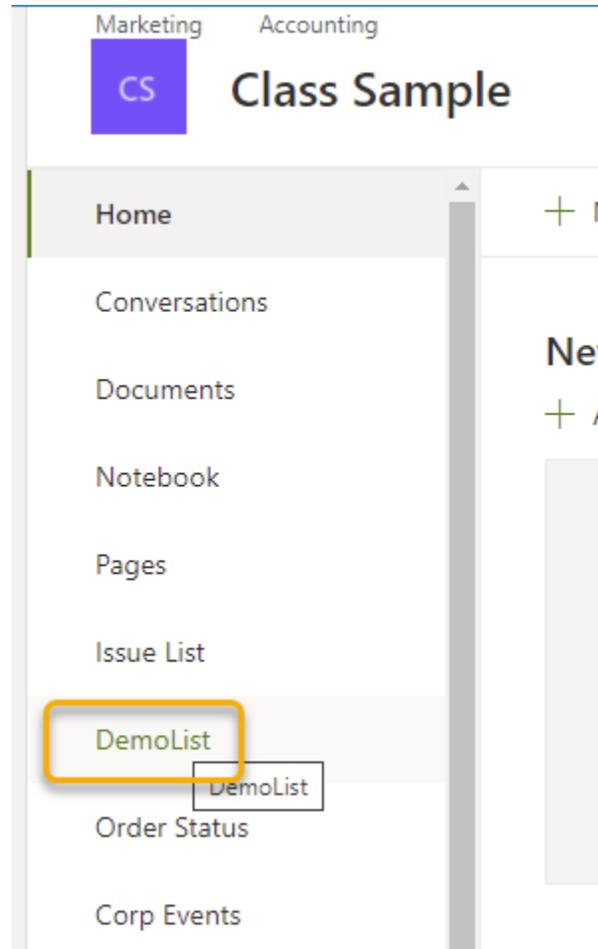
Permissions are initially assigned to the root site of the Site Collection when it is created. Child sites have the option when they are created to use unique permissions or inherit the permissions of the parent site. The default setting is to inherit permissions, but you can always break the inheritance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

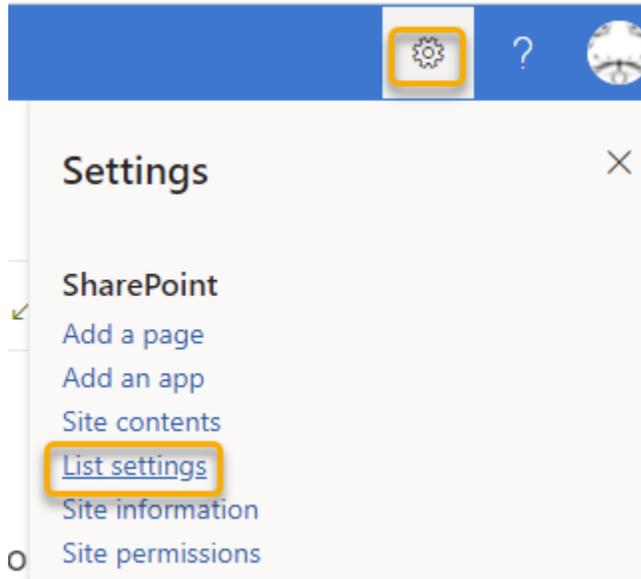
### ❖ 5.3.1. Modifying Permissions Inheritance

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**.

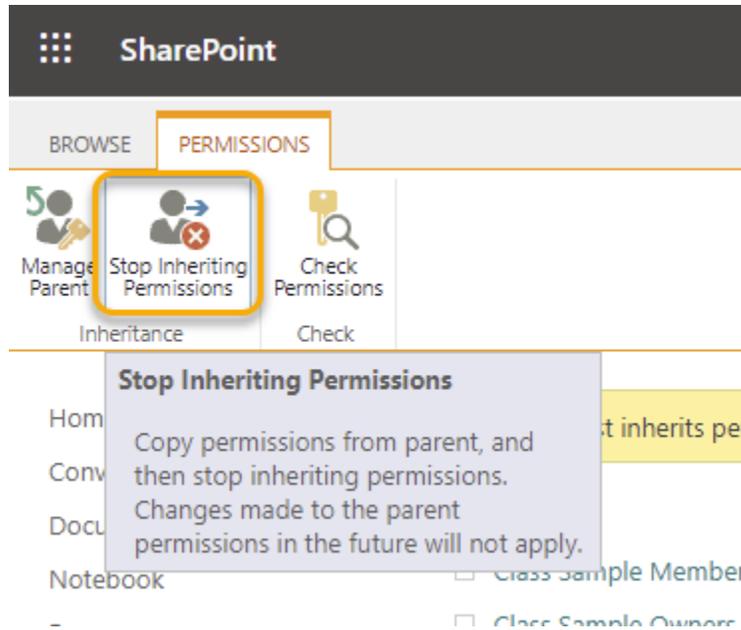
#### Permissions and Management

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

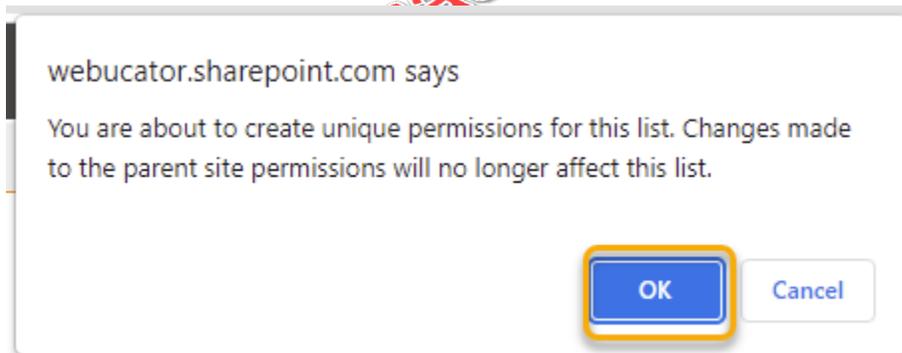
D. Note on the **List Permissions** page for the **Demo List** there is a banner notifying us that the list is inheriting permissions from its parent, **Class Sample Home Site** in this example.

 This list inherits permissions from its parent. (Class Sample)

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



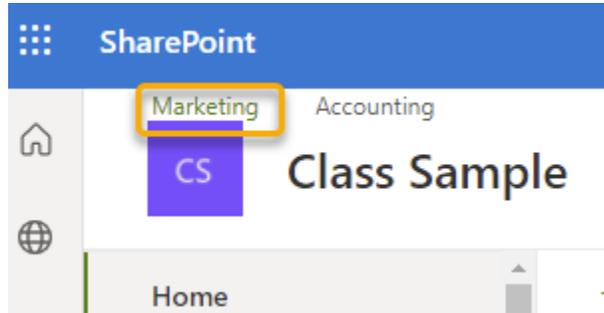
- F. Click the **OK** button on the **Message from web page** dialog window notifying you that permission from the parent will no longer affect this list.



- 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.



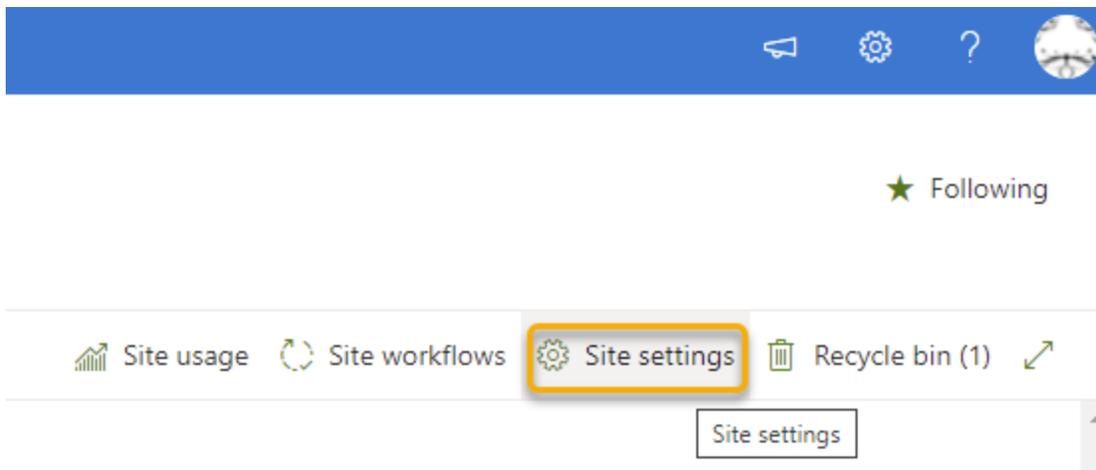
- 3. Modify the permission of the **Marketing** child site.
  - A. Click the **BROWSE** tab to close the **PERMISSIONS** toolbar then click the **Marketing** link in the **Top Link Bar**.



**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**.

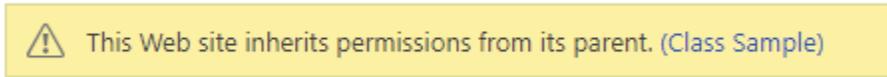


- C. Click the **Site permissions** link on the **Site Settings** page.

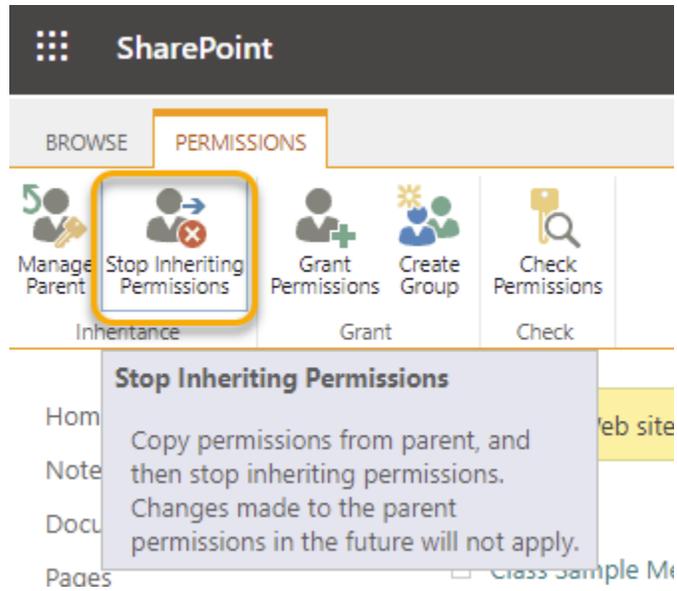
## Site Settings

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

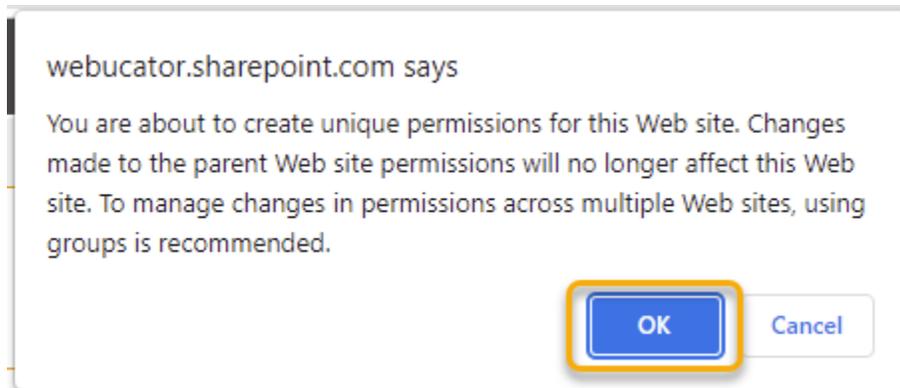
- D. Note on the **Site Permissions** page for the **Marketing** site there is a banner notifying you that the list is inheriting permissions from its parent.



- 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

5

<b>Visitors to this Site</b> Visitors can <b>read</b> content in the Web site. Create a group of visitors or re-use an existing SharePoint group.	<input type="radio"/> Create a new group <input checked="" type="radio"/> Use an existing group
	Class Sample Visitors ▾
<b>Members of this Site</b> Members can <b>contribute</b> content to the Web site. Create a group of site members or re-use an existing SharePoint group.	<input type="radio"/> Create a new group <input checked="" type="radio"/> Use an existing group
	Class Sample Members ▾
<b>Owners of this Site</b> Owners have <b>full control</b> over the Web site. Create a group of owners or re-use an existing SharePoint group.	<input type="radio"/> Create a new group <input checked="" type="radio"/> Use an existing group
	Class Sample Owners ▾

OK

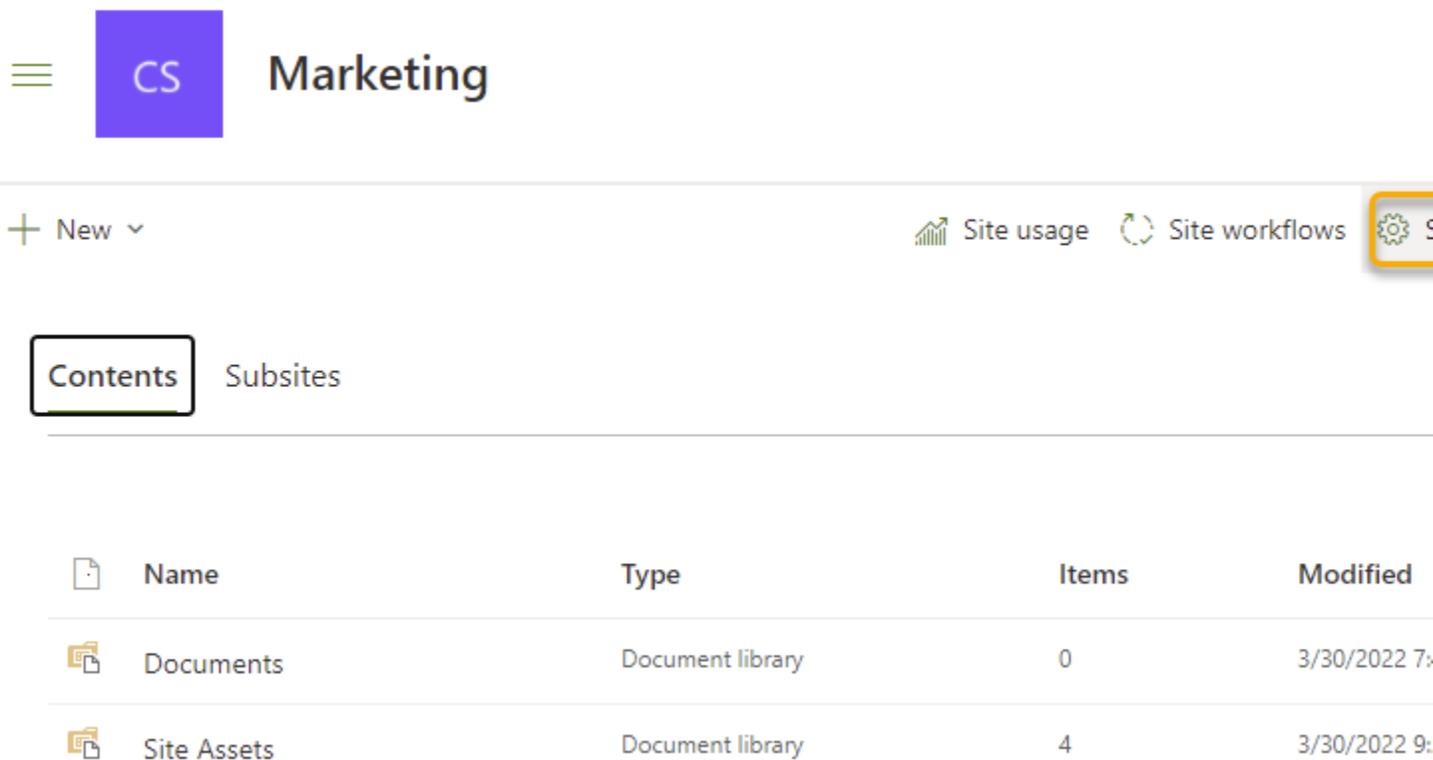
- H. Follow the earlier steps to navigate back the **Site permissions** page for **Marketing**.
- I. Note that now the **Site Permissions** page banner is notifying you that **This website has unique permissions**.

# Exercise 7: 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. At the top, there is a navigation bar with a hamburger menu icon, a purple square containing the letters 'CS', and the word 'Marketing'. Below this, there is a '+ New' dropdown menu and several utility links: 'Site usage', 'Site workflows', and a gear icon for 'Site settings'. Under the 'Site settings' gear, the 'Contents' tab is highlighted with a black border, and 'Subsites' is also visible. Below the navigation, there is a table with the following data:

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

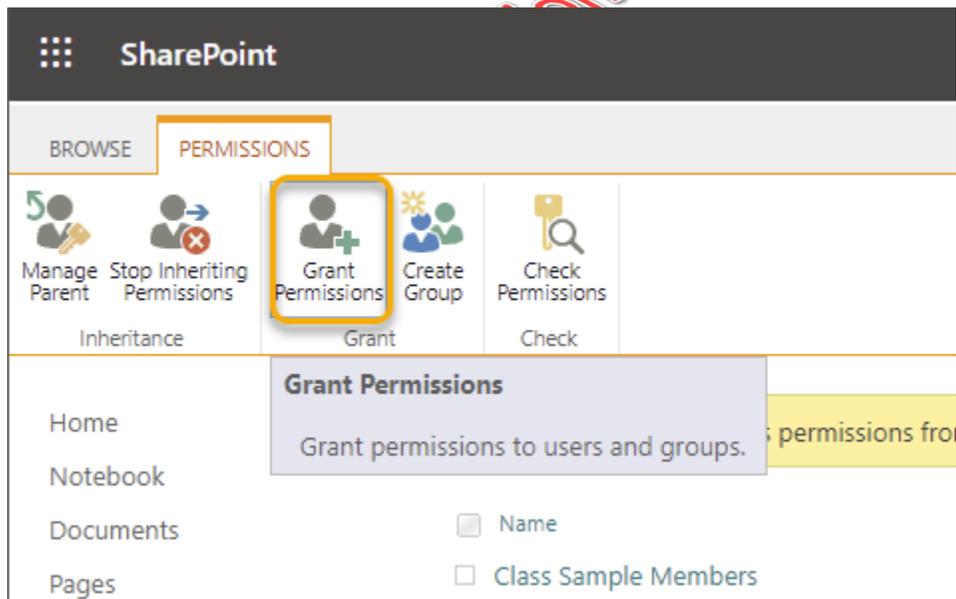
3. Click the **Site permissions** link on the **Site Settings** page.



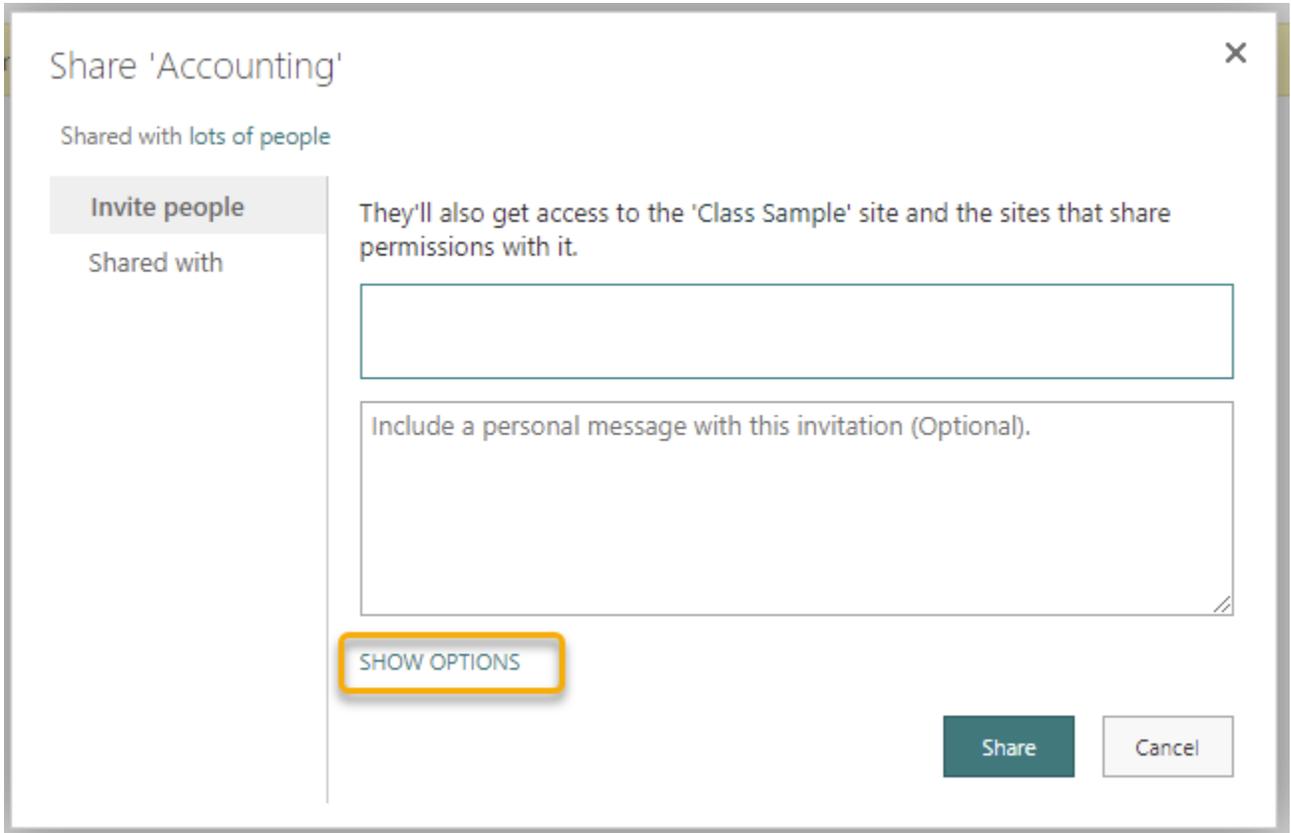
Marketing Accounting  
Site Settings

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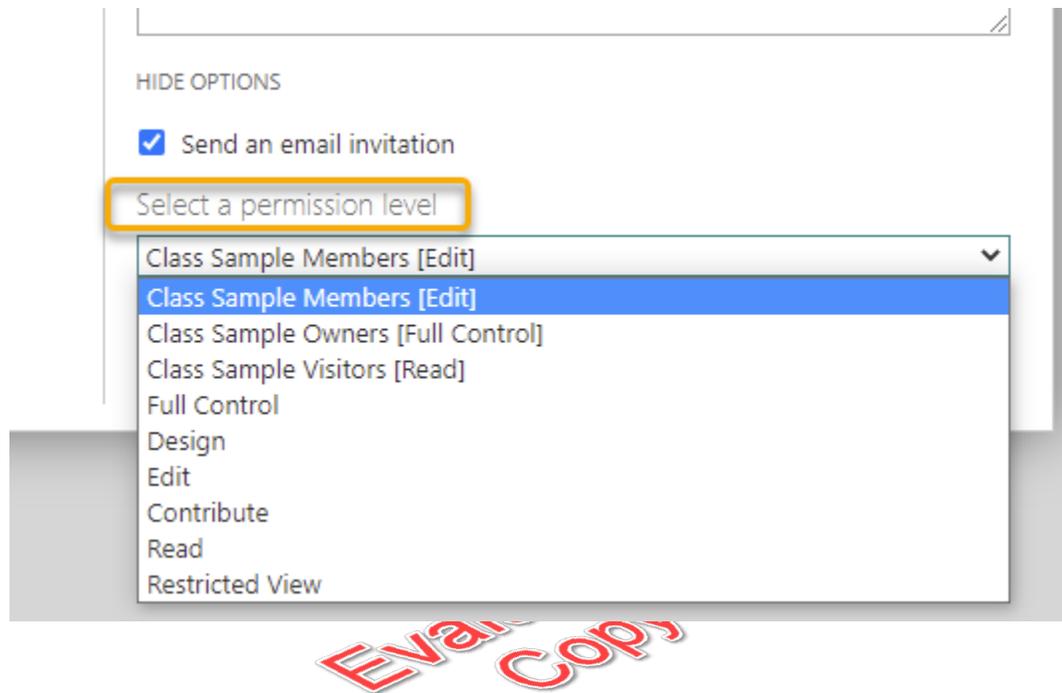
4. Click the **Grant Permission** link button from the **PERMISSIONS** tab toolbar.



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.



## 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.