

SharePoint Online End User Training



with examples and
hands-on exercises

WEBUCATOR

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In addition to her training, Tracy is a graphic designer/programmer and consultant and has developed hundreds of logos, marketing materials, websites, and multimedia solutions for customers worldwide. She has been involved in large corporate software rollouts and helped many organizations optimize and streamline data solutions.

Class Files

Download the class files used in this manual at

<https://static.webucator.com/media/public/materials/classfiles/SPO101-4.0.2-sharepoint-online-end-user-training.zip>.

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LESSON 1

Setup

EVALUATION COPY: Not to be used in class.

Topics Covered

- Setting up the sample site for class.

Introduction

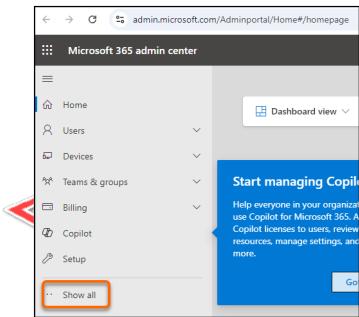
In order to follow the examples in this course, you will need a SharePoint Online Team site to use for exploring and performing learning tasks. You can either ask your site administrator to create a site using the **Standard Team** site template, or if you have sufficient permissions with your Office 365 account, you can do this yourself by following the instructions in this lesson.

Exercise 1: Creating a SharePoint Online Site for Exercises

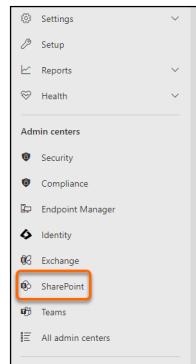
⌚ 5 to 15 minutes

In this exercise, you will learn how to create a SharePoint Online site and a subsite for use with the course's exercises. This process involves enabling subsite creation, navigating to the SharePoint Online app, and setting up both a root site and a child site. Follow the steps below to complete the setup:

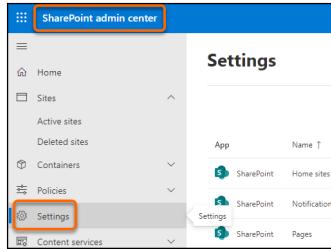
1. Turn on subsite creation for your SharePoint tenancy:
 - A. Navigate to the Microsoft 365 admin center (<https://admin.microsoft.com/Adminportal/Home#/homepage>).
 - B. Click the **Show all** link in the left navigation panel:



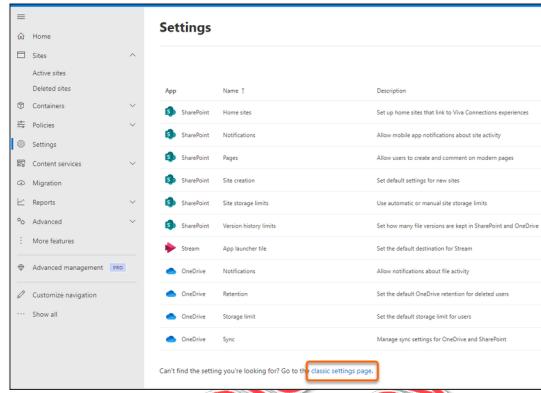
- C. Click the **SharePoint** link in the **Admin centers** group under the left navigation panel:



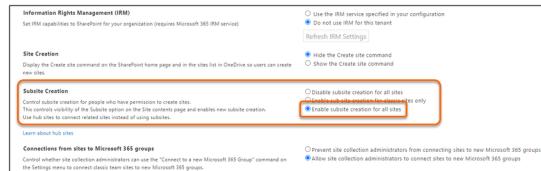
- D. On the **SharePoint admin center** home page, click the **Settings** link in the left navigation panel:



E. At the bottom of the **Setting** page list, click the [classic settings page](#) link:



F. On the SharePoint classic settings page, scroll down to the **Subsite Creation** setting and make sure it is set to the **Enable subsite creation for all sites** option:

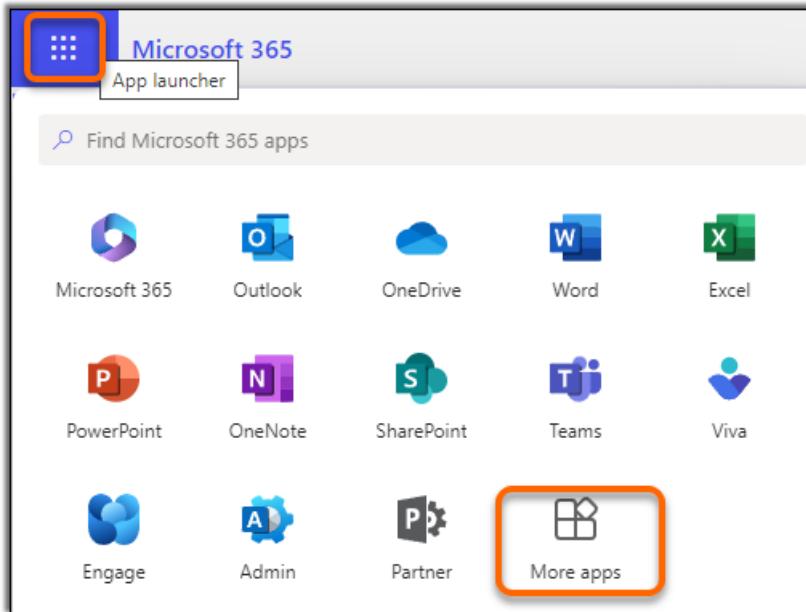


G. Scroll the the bottom of the classic settings page and click the **OK** button to save the changes.

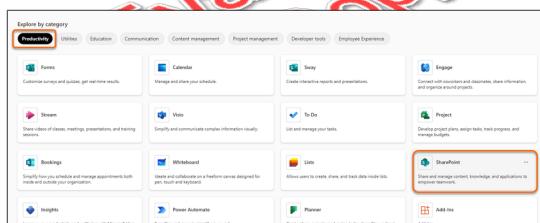
H. Close the classic settings page browser tab.

2. Navigate to your SharePoint Online App.

- Log in to your Office 365 account.
- To navigate to SharePoint Online, click the **App launcher** grid icon in the upper left corner of the window. If **SharePoint** is in the list displayed, click it. If it is not, click the **More apps** option:

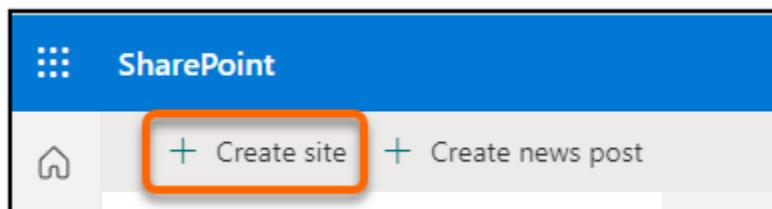


C. If you had to use the **More apps** option, look for and click the **SharePoint** tile from the **Productivity** category list of apps:

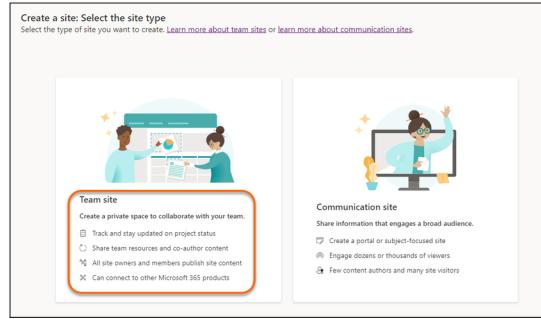


3. Create a root site for use with this course's exercises named **Exercise Team Site**.

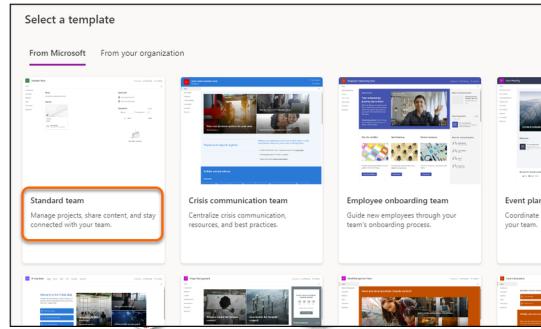
A. Click **Create Site**:



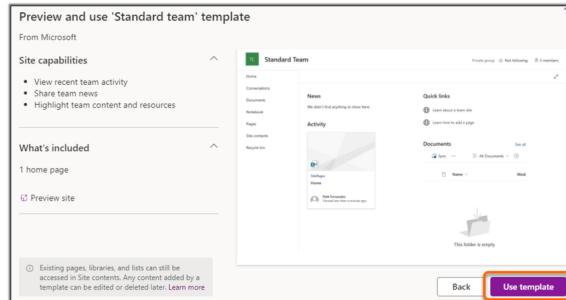
B. On the **Create a site: Select the site type** dialog, click **Team Site**:



C. On the **Select a template** dialog, choose and click the **Standard team** template:



D. On the **Preview and use 'Standard team' template** dialog, click the **Use template** button:



E. On the **Give your site a name** dialog, type “Exercise Team Site” as the **Site name**, “Site for exercise examples” as the **Site description**, and “ExerciseTeamSite” as the **Group email address**. The rest of the settings are default. Click **Next**:

Give your site a name

Decide on a unique name that follows your organization's naming standards. The description is optional, but useful for people to understand what your site is for.

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

Site name*
Exercise Team Site
The site name is available.

Site description
Site for exercise examples

Group email address*
ExerciseTeamSite
The group alias is available.

Site address*
http://webucator.sharepoint.com/teams/ ExerciseTeamSite
The site address is available.

Standard team Back **Next**

F. On the **Set language and other options** dialog, leave the defaults and click the **Create site** button:

Set language and other options

Set the default language for your site. If required, select labels and other settings to classify what type of content is stored on your site and who should have access to the information.

Privacy settings
Private - only members can access this site

Select a language
English

Standard team Back **Create site**

G. On the **Add site owners and members** dialog, leave the group members blank for now and click **Finish**:

Add site owners and members

Consider assigning one additional site owner or a group to help manage the content. [Learn more about permissions](#)

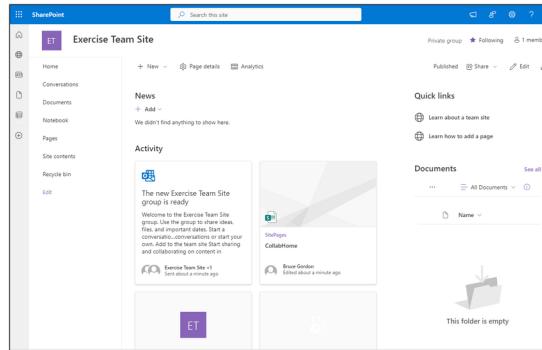
Site owners have full control of site content, theme, permissions, hub associations, and other site settings.

Site members can edit and view site content, including files, pages, lists, and navigation.

Add members
Start typing a name

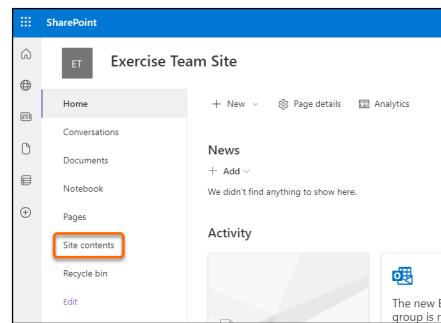
Standard team **Finish**

H. The root site is now ready for class:

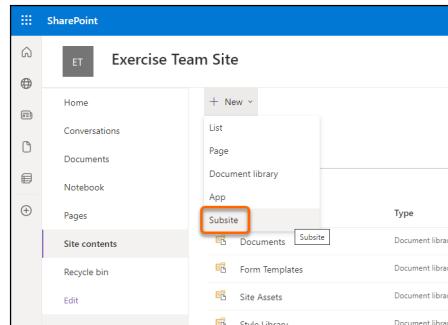


4. Create a child site used for navigation in the exercises named Sub Site A.

A. From the newly created **Exercise Team Site**, click the **Site contents** link from the left-hand navigation panel:



B. Click the **New** menu link and then click **Subsite** from the drop-down menu:

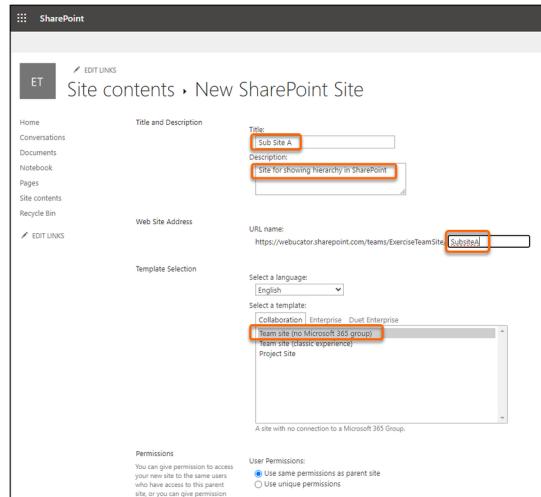


C. On the **New SharePoint Site** configuration page, enter the following values:

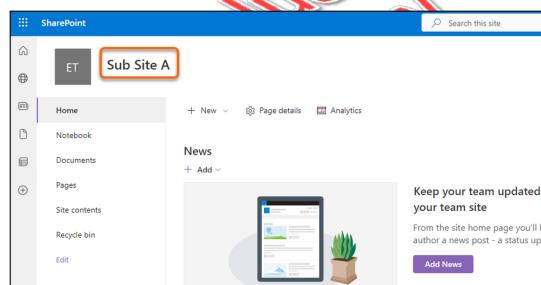
- i. **Title:** Sub Site A
- ii. **Description:** Site for showing hierarchy in SharePoint
- iii. **URL name:** SubsiteA

iv. **Select a template:** On the **Collaboration** tab, select **Team site (no Microsoft 365 group)**.

Leave the rest at the default configuration and click the **Create** button at the bottom of the form:



D. The child site is now ready for class.



Security Issues

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

Conclusion

In this lesson, you have learned how to set up the sample site for class.

LESSON 2

Introduction

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Topics Covered

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

Introduction

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

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2.1. SharePoint Online

SharePoint Online is a cloud-based service provided by Microsoft as part of the Office 365 suite. It is designed to facilitate collaboration, document management, and information sharing within organizations. SharePoint Online allows users to create, manage, and share content and applications, making it a powerful tool for enhancing productivity and communication in the workplace.

❖ 2.1.1. Key Features

1. **Document Management** — SharePoint Online enables users to store, organize, and manage documents in a central location. It supports version control, metadata, and advanced search capabilities.
2. **Collaboration** — Teams can collaborate on projects using shared documents, task lists, and calendars. Real-time co-authoring allows multiple users to work on the same document simultaneously.
3. **Customizable Sites** — Users can create and customize sites to meet their specific needs. These sites can include pages, libraries, lists, and web parts that provide various functionalities.
4. **Integration with Office 365** — SharePoint Online integrates seamlessly with other Office 365 applications, such as Outlook, Teams, and OneDrive, providing a cohesive and streamlined user experience.
5. **Security and Compliance** — SharePoint Online offers robust security features, including data encryption, access controls, and compliance tools to help organizations meet regulatory requirements.

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

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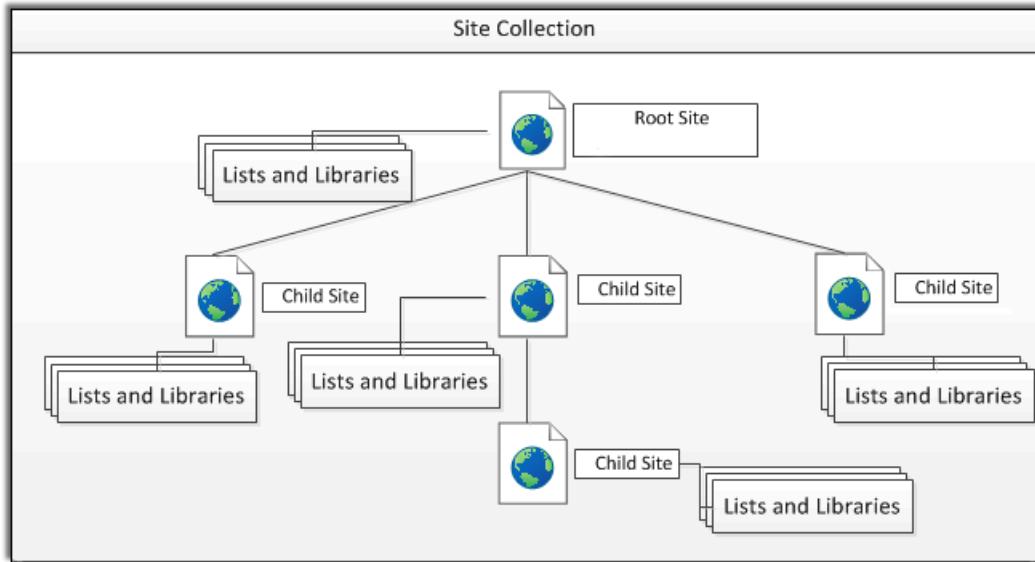
*

2.2. Site Layout and Navigation

❖ 2.2.1. Layout Basics

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

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



❖ 2.2.2. Site Layout

**Evaluation
Copy**

The layout of a SharePoint Online site typically consists of the following main components:

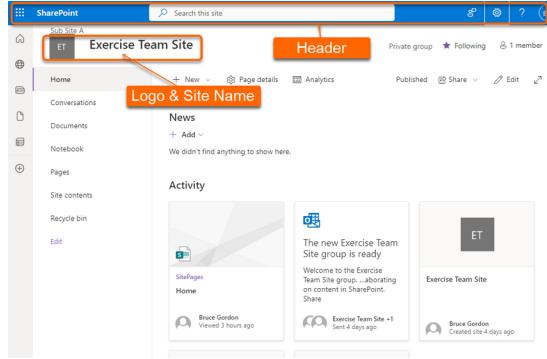
Possible Differences

Note that different site templates may or may not have all of the layout elements listed below. The images were taken from a site created using the **Team Site** template.

Site Header

The header is located at the top of the site and usually includes the site logo, site name, and a set of quick access links. It may also contain a search bar for site-wide searches.

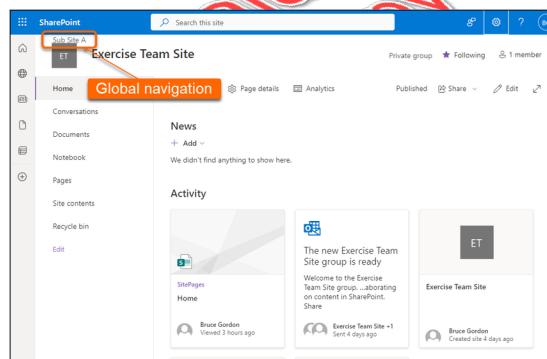
Image of a Header, Logo and Title from a Team Site:



Navigation Bar

The navigation bar, often referred to as the global navigation or top navigation, is found just below the header. It provides links to the main sections of the site and other related sites. This navigation can be customized to include links to important resources, external websites, or specific site pages.

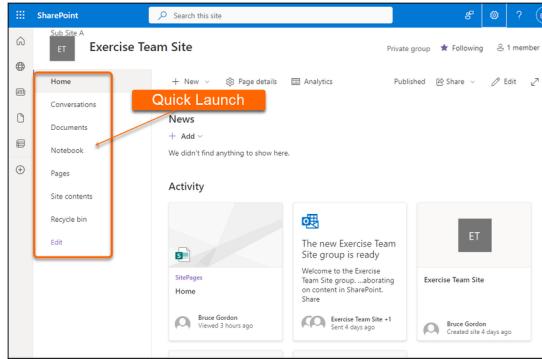
Image of the Global Navigation bar from a Team Site:



Left-Hand Navigation (Quick Launch)

The left-hand navigation, also known as Quick Launch, provides links to frequently accessed content within the site, such as document libraries, lists, and pages. This menu can be customized to include the most relevant links for site users.

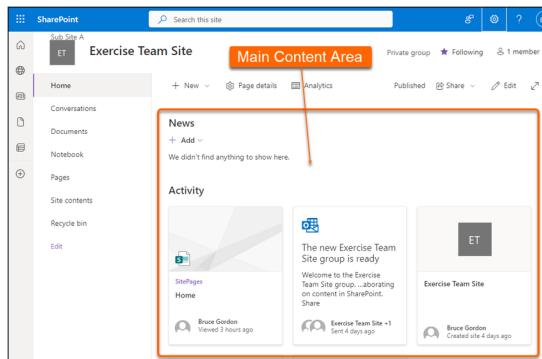
Image of the Quick Launch navigation from a Team Site:



Main Content Area

The main content area is the central part of the page where site content is displayed. This area can include web parts, such as document libraries, lists, news, events, and other customizable elements.

Image of the Main Content area from a Team Site:



Footer

The footer is located at the bottom of the site and can include links to important organizational policies, contact information, or additional resources. Note that not all SharePoint sites use a footer by default. The Team Site template shown in the previous images is a good example.

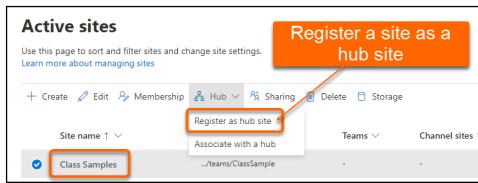
❖ 2.2.3. Site Navigation

Effective navigation is key to ensuring users can easily find and access the information they need. SharePoint Online provides several navigation options:

Hub Sites

Hub sites connect and organize multiple SharePoint sites. They provide a consistent navigation experience and allow for unified branding and search across associated sites. Hub sites often include a hub navigation bar that appears on all associated sites.

Hub sites are configured by someone with SharePoint Admin role using the **SharePoint admin center** as shown in the following image:



Hub Sites are an advanced topic that is outside the scope of this course.

Site Navigation Options

Individual sites have their own navigation structures, which can include:

1. **Global Navigation:** This is usually the top navigation bar that provides links to other important sites and resources.
2. **Local Navigation:** The left-hand Quick Launch menu provides links to the site's libraries, lists, and pages.
3. **Breadcrumbs:** These are links at the top of the main content area that show the user's current location within the site hierarchy, allowing for easy backtracking.

You will learn more about how to configure site navigation in the **Working with Sites** lesson of this course.

Mega Menu

The mega menu is a feature that allows for a more detailed and structured navigation menu. It can display multiple levels of links and categories, providing a comprehensive view of the site's contents and resources.

The Mega menu is a feature that comes with Hub Sites that is outside the scope of this course.

Modern Navigation Features

SharePoint Online also includes modern navigation features such as:

1. **Search:** Integrated search bars allow users to quickly find documents, lists, and other content within the site or across associated sites.
2. **Personalized Navigation:** Navigation links can be personalized based on the user's role, permissions, and frequently accessed content.

Best Practices for SharePoint Navigation

To ensure effective navigation within a SharePoint Online site, consider the following best practices:

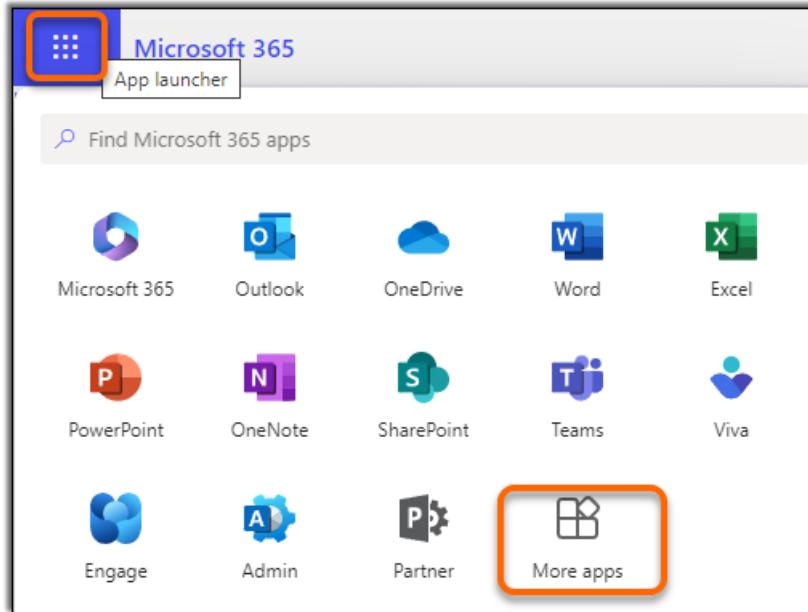
1. Organize navigation links logically and intuitively.
2. Use clear, descriptive labels for navigation links.
3. Regularly review and update navigation to reflect changes in content and user needs.
4. Leverage hub sites for a consistent navigation experience across related sites.

Exercise 2: Team Site Navigation

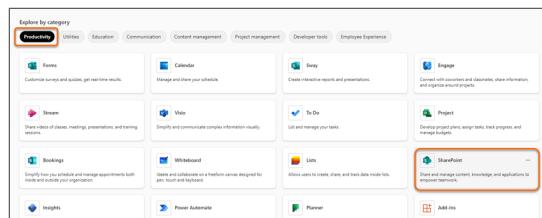
⌚ 5 to 15 minutes

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

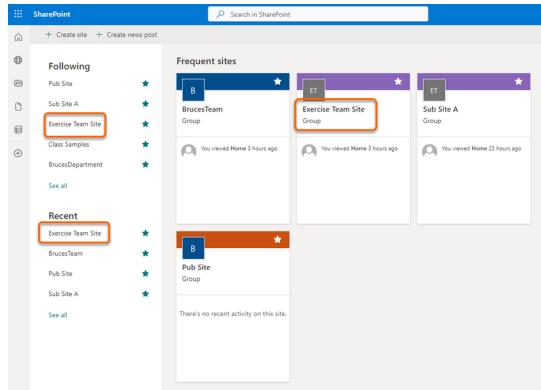
1. Navigate to your SharePoint Online exercise site.
 - A. Launch your browser.
 - B. Log in to your Office 365 account.
 - C. To navigate to SharePoint Online, click the **App launcher** grid icon in the upper left corner of the window. If **SharePoint** is in the list displayed, click it. If it is not, click the **More apps** option:



- D. If you had to use the **More apps** option, look for and click the **SharePoint** tile from the **Productivity** category list of apps:



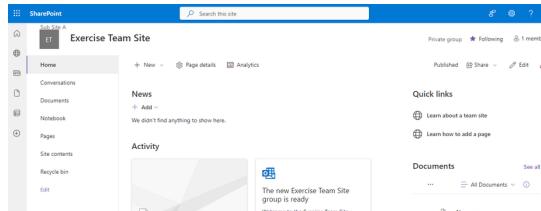
E. On the main SharePoint dashboard, look for and click the link for the **Exercise Team Site**. You may have multiple links available as shown in the following image:



Note

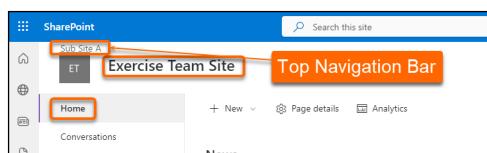
If you do not see the **Exercise Team Site** listed, check with your SharePoint Online administrator and make sure someone performed the required setup instructions at the beginning of this course.

F. The home page of your team site should look similar to the following:

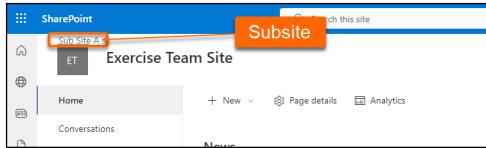


2. Navigate using the Top Navigation Bar (Global Navigation).

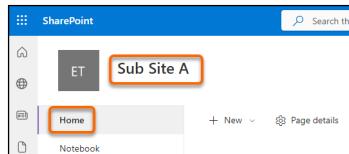
A. Verify that you are currently located on the home page of your Team Site, the **Exercise Team Site**:



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



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

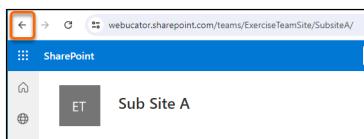


Note

It might be hard to tell that you are on a different site. Both sites' home pages and Quick Launch menus are based on the same Team Site templates, and you have not made any customizations to either. The only visual differences at this point are the titles such as **SubSite A** and **Exercise Team Site**. In a later part of this course, you will modify the content of pages such as the home page. You will also be adding content to the site that will automatically change the Quick Launch menu.

3. Navigate back to the parent site.

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

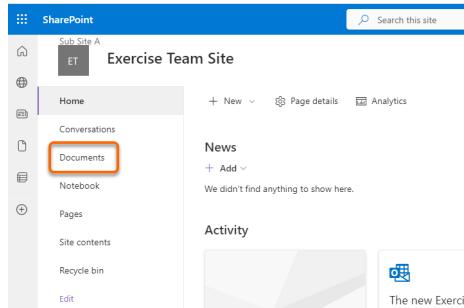


Looking Forward

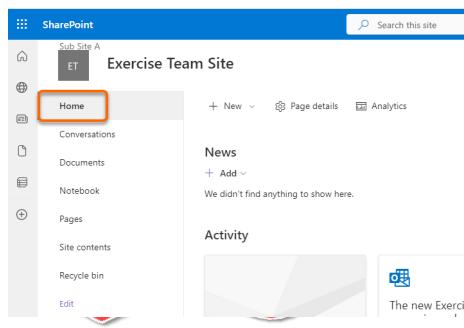
In a later part of this course, you will learn how to configure child sites to use the same **Top Link Bar** as their parent site as well as how to add custom links.

4. Navigate using the Quick Launch menu.

A. Click the **Documents** link inside the Quick Launch menu located on the left side of the page:

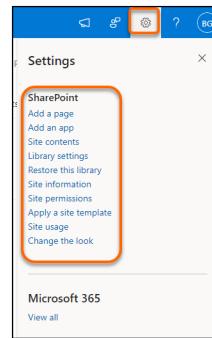


B. Navigate back to the home page of the site by clicking the **Home** link within the **Quick Launch** menu:



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

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



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

Conclusion

In this lesson, you have learned:

1. About SharePoint Online.
2. About the basic hierarchy of a Site Collection.
3. About the basic menus and toolbars in a Site.
4. How to navigate within a Site.

LESSON 3

List Basics

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Topics Covered

- List Templates.
- Working with default lists in a Team Site.
- Creating a new list from a List Template.
- Creating a custom list.
- Adding columns to a list.
- Controlling and validating input into list fields.
- Linking data from separate lists.

*Evaluation
Copy*

Introduction

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

❖ Key Features

1. **Customizable Columns** — Lists can include various types of columns, such as text, number, choice, date, and more, allowing for structured data entry.
2. **Views** — Users can create multiple views to display list data in different formats, such as calendars, Gantt charts, or standard lists, depending on their needs.
3. **Permissions** — SharePoint allows for granular permission settings on lists, ensuring that the right people have access to the right information.

4. **Integration** — Lists can integrate with other Office 365 apps like Power Automate, Power Apps, and Teams, enhancing productivity and automation.
5. **Versioning** — Lists support version history, enabling users to track changes and restore previous versions if necessary.

❖ Common Use Cases

1. **Task Management** — Track tasks and projects with custom columns for priority, due date, status, and assignee.
2. **Inventory Tracking** — Maintain records of equipment, supplies, or assets with columns for item details, quantities, and locations.
3. **Event Planning** — Organize events by listing participants, schedules, and resources required.
4. **Issue Tracking** — Log issues or bugs with details like severity, date reported, assigned personnel, and resolution status.

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*Evaluation
Copy*

3.1. Creating Lists Using Templates

In SharePoint Online, lists are created within a site using a List Template. Content in SharePoint Online can be stored in either a List or a Library. The primary difference between lists and libraries is that libraries always store a document with each item, such as a Word document or Excel spreadsheet. The site template used to create a SharePoint Online site determines the lists and libraries that are initially created. A good example of this is a site created using the basic **Team site** template. Looking at the contents of a freshly created **Team site**, you can see that there are no lists defined with the template, only libraries:

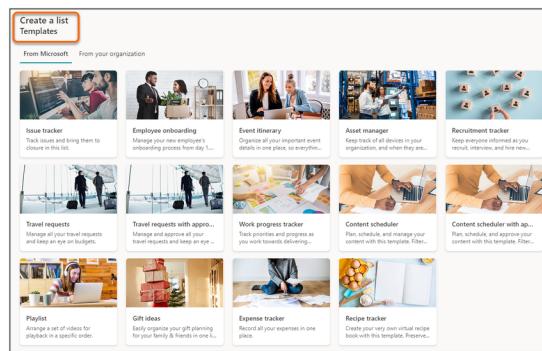
Contents		Subsites
	Name	Type
Documents		Document library
Form Templates		Document library
Site Assets		Document library
Style Library		Document library
Power BI		App
Site Pages		Page library

Libraries will be covered in a separate lesson in this course.

Note

The **App** type shown in the previous image was used in earlier versions of SharePoint to label lists, libraries, and custom coded Apps known as **Add-ins**. It was always a bit confusing with that naming system and with the current Online version that has been rectified. At the time of this writing, Apps or Add-ins are still a thing but are marked for retirement in 2026.

SharePoint Online provides a number of predefined list templates that can be used to create new lists. These templates are designed to help users get started quickly with common list types. The following image shows the list templates that were provided by Microsoft at the time of this writing:



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

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

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3.2. Creating Lists

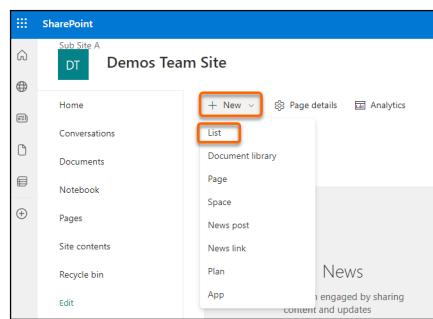
❖ 3.2.1. Creating Lists Using List Templates

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

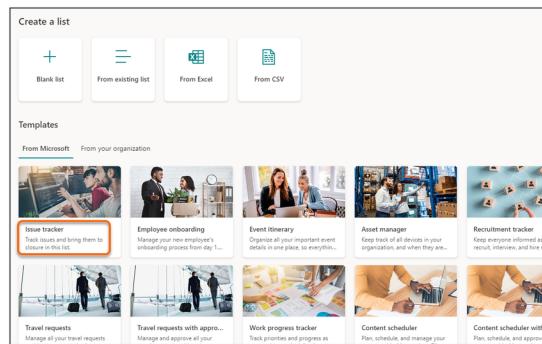
All of the lists in this demonstration are created in an instance of a demonstration Team Site.

1. Create an instance of an Issue Tracker list.

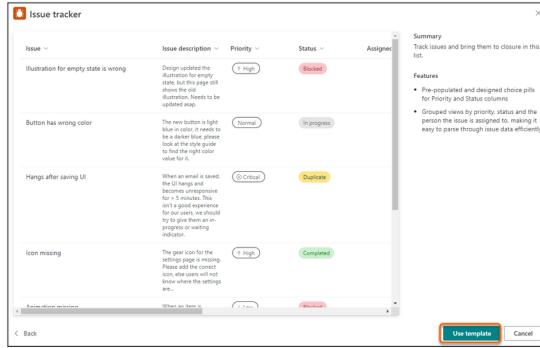
A. From the **Home** page of the Team Site, click the **New** drop-down menu and choose **List** from the options:



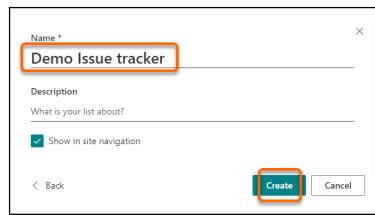
B. Click **Issue Tracker** from the list of templates:



C. On the **Issue Tracker** summary dialog, click the **Use template** button:



D. Type **Demo Issue tracker** for the **Name** and optionally leave the **Description** field empty and click the **Create** button:

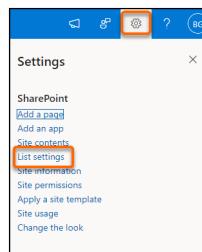


Note

The **Show in site navigation** check-box field is selected by default and will add the list to the site's Quick Launch menu. This can be changed later in the list settings.

2. To change the name of the **Issue Tracker** list:

A. Click the **Settings** menu and then choose **Settings > List settings** from the drop-down menu:



Note

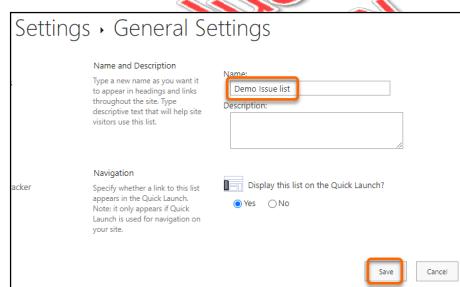
The **List settings** menu option will open the setting for the list you have currently open, in this example that's the newly created **Demo Issue Tracker** list.

B. Click the **List name, description and navigation** link under the **General Settings** dialog:

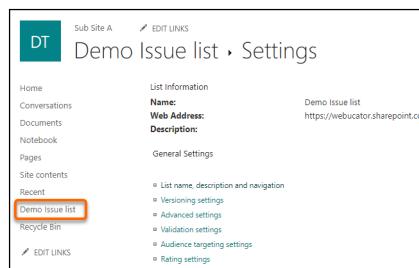
Demo Issue tracker › Settings



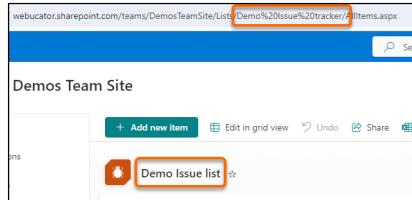
C. Change the **Name** field to **Demo Issue List** and click the **Save** button:



D. Click the **Demo Issue List** link in the **Quick Launch** menu to return to the list:



E. Note the URL in your web browser's navigation field and the portion with the original name of the list is still used; renaming the list does not change this:

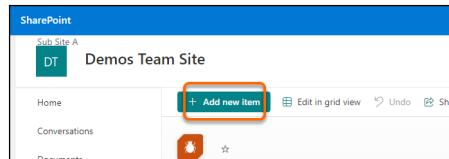


Note

The URL of the list is based on the original name of the list when it was created. This is important to remember if you are planning to rename lists after they have been created. Also, note in this example the ‘%20’ in the URL is a space character. If you do not want those in your URL, do not use spaces in the list name. You can always rename it later and add spaces without changing the URL.

3. Create a new item in the list.

A. Click the **Add New item** button at the top of the **Demo Issue List**:



B. Use the following table to fill in the fields in the **Issue List - New Item** form, then click **Save**.

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

New item

(1) Issue
Late Order

(2) Issue description
Didn't arrive on time

Describe the issue

(3) Priority
High

Add the priority of this issue

(4) Status
In progress

Status of the issue

(5) Assigned to
Enter a name or email address

Person or group the issue is assigned to

(6) Date reported
Enter a date

The date the issue was reported

Save Cancel

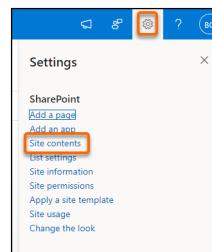
4. Note the default view of the **Demo Issue list** including the columns, grouping, and sorting options:

ID	Issue	Status	Priority	Assigned to	Date reported
1	Late Order	In progress	High		

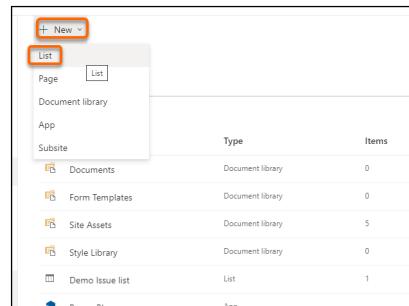
These are all defined by the template but can be modified to suit your needs.

5. Preview some of the list template options:

A. Click the **Settings** menu and then choose the **Site Contents** menu item:



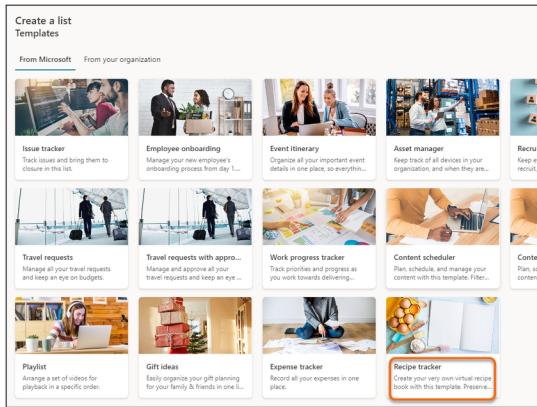
B. Click **New** and select **List**:



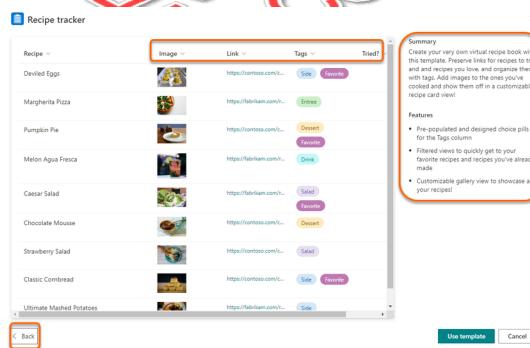
Note

This is just a different way of getting to the **New List** dialog without having to navigate back to the **Home** page of the site and use the **New > List** menu command from there, like what was done with the **Issue Tracker** list.

C. Click **Recipe Tracker** from the list of templates:



D. Note the columns, summary, and features for this list template:



Click the **Back** arrow button to go back to the list of templates.

E. Select different templates to see the information and previews available with each type. When done you can click the **Cancel** button to exit out of the template selection dialog.

Note

This step is just to explore the choices and get an idea of what comes 'out-of-the-box' with SharePoint Online for creating lists. Any of these list

templates can become a starting point and be customized to suit the needs of your site.

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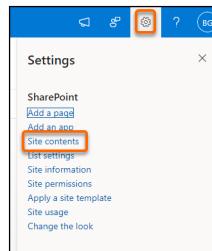
*

3.3. List Columns

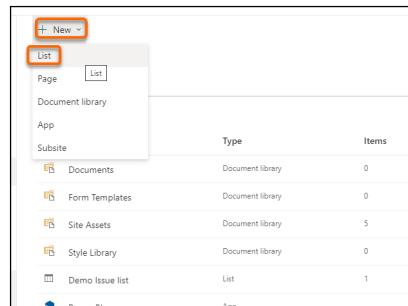
❖ 3.3.1. Creating List Columns

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

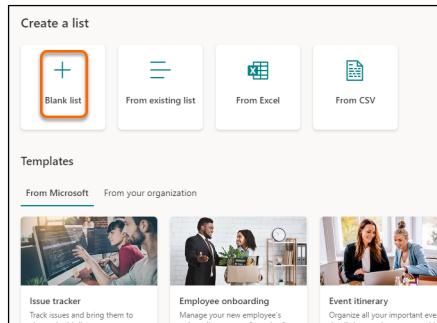
1. Create a new list in your Team Site using the **Custom List** template.
 - A. Click the **Settings** menu and then choose the **Site Contents** option:



- B. Click the **New** button and choose **List**:



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

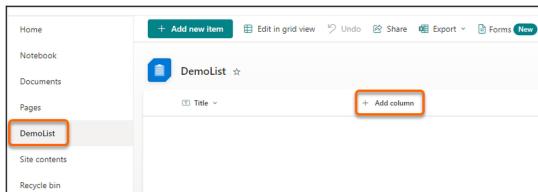


D. Enter **DemoList** in the **Name** field and then click the **Create** button:

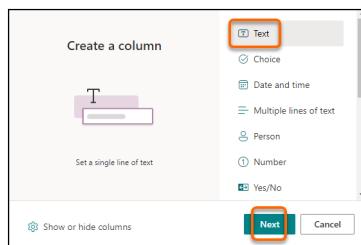


2. Add a new **Single line of text** list column to **DemoList**.

A. Click the **Add column** link at the top of the **DemoList** contents view:



B. Make sure **Text** is selected in the **Create a column** dialog and click the **Next** button:



C. Enter **Item Description** in the **Name** field and leave the default for the **Type** option field set to **Single line of text**. Click **Save**:

Create a column

Name *

Description

Type

Default value

Use calculated value (i)

More options ▼

Save **Cancel**

3. Add a new **Choice** list column to **DemoList**.

A. Click the **Create column** button under the Columns category:

Columns

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

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

Create column

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

Note

The **Create column** button on the list settings is another way to add columns. Arguably, adding columns from the link on the main view of the list is a more direct way to add a single column, but doing it this way there are fewer dialogs to click through when adding multiple columns, as you will see in the upcoming steps.

B. Enter **Item Category** in the **Column name** field and change **The type of information in this column is:** option field to **Choice**:

Name and Type

Column name:

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

The type of information in this column is:

Single line of text

Multiple lines of text

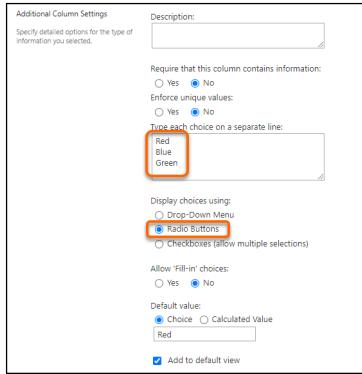
Choice (menu to choose from)

Number (1, 1.0, 100)

Currency (\$, 4, €)

Date and Time

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



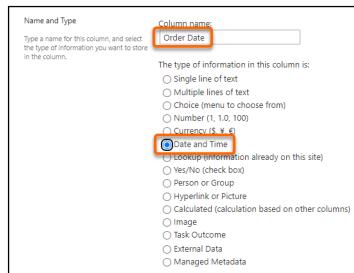
Display choices using Options

Note the **Display choices using** options that include **Radio Buttons** and **Checkboxes**. The checkboxes allow for multiple choices (note that this feature may limit the view options) and the radio buttons provide an alternative display for single selections. The default drop-down menu takes up the least amount of room if the column is included in a view. Views will be covered in a later part of this course.

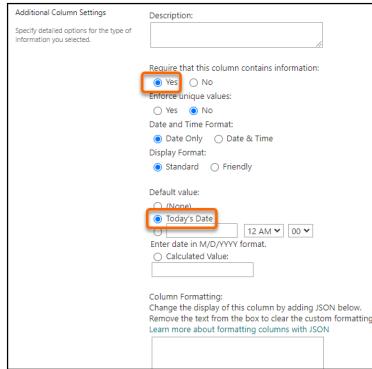
D. Click the **OK** button to complete creating the new list column.

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

- Click the **Create Column** button under the **Columns** category.
- Enter **Order Date** in the **Column name** field and change **The type of information in this column is:** option field to **Date and Time**:



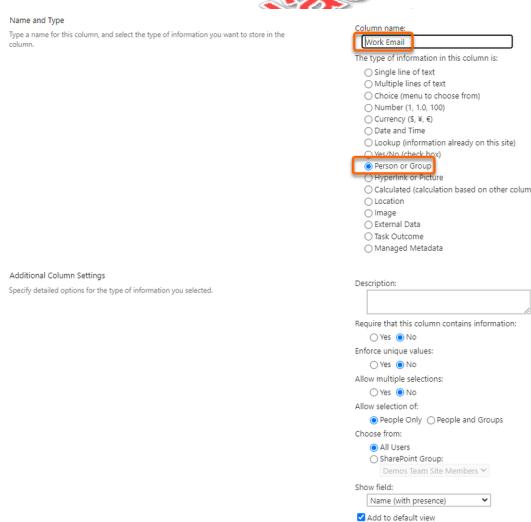
C. In the **Additional Column Settings** region, change the **Require that this column contains information** option field to **Yes** and the **Default value** option field to **Today's Date**:



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

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

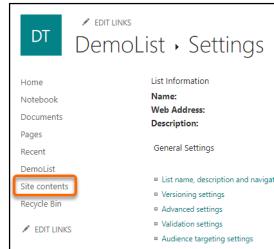
- Click the **Create Column** button under the Columns category.
- Enter **Ordered By** in the **Column name** field and change **The type of information in this column is:** option field to **Person or Group**:



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

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

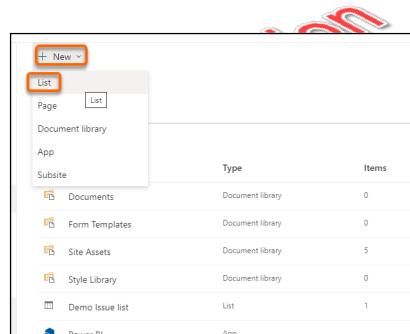
- Click the **Site Contents** menu item from the site's Quick Launch menu:



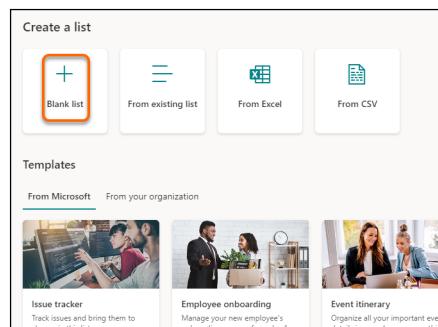
Note

The **Site Contents** Quick Launch link is a quick way to get to the lists and libraries in the site and is an alternative to using the **Settings** menu. Depending on your site's configuration, you may not have the option listed in your Quick Launch menu; in that case you can always use the **Settings** menu.

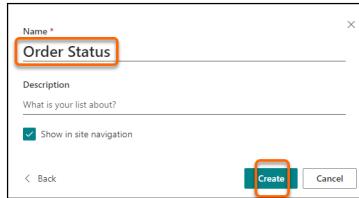
B. Click the **New** button and choose **List**:



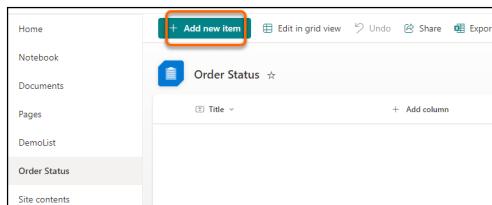
C. Select the **Blank list** template from the list of available templates:



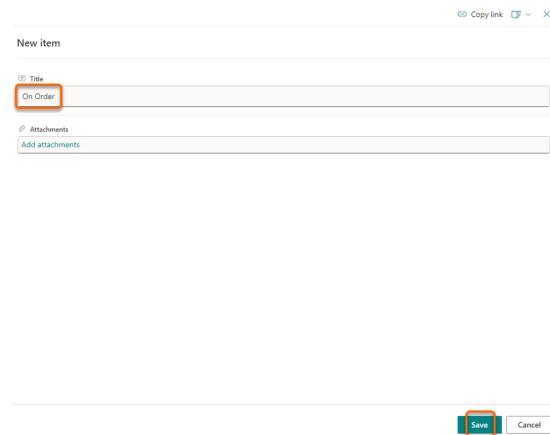
D. Enter **OrderStatus** in the **Name** field and then click the **Create** button:



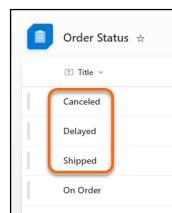
E. Click the **Add new item** link at the top of the **OrderStatus** list:



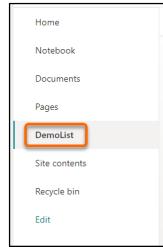
F. Enter **On Order** in the **Title** field text box and click the **Save** button:



G. Repeat the previous steps to create the following **Order Status** items:



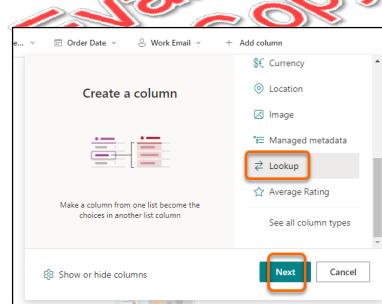
H. Click the **DemoList** link in the site's Quick Launch:



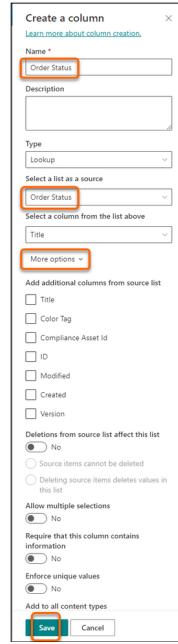
I. Click the **Add column** link on the end of the columns list at the top of the list view:



J. Select **Lookup** from the **Add column** menu and click the **Next** button:

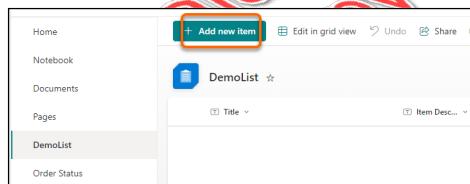


K. Enter **Order Status** in the **Name** text box field and change **Select a list as a source** field to **OrderStatus**, expand and review **More options**, and then click the **Save** button:



7. Create a sample item in the new **DemoList** to test the results of the custom columns.

A. Click the **Add new item** link at the top of the **DemoList** to create a new item:



B. Use the data in the following image as sample data for the new **DemoList** item, change the **Ordered By** field data to an account name that exists in your SharePoint installation and click the **Save** button:

The Who Field

For the **Order By** field, you can optionally click a name from the drop-down list that SharePoint provides. Try your identity. NOTE: If you are missing any fields - such as Attachments, you may be using a different template or the settings may not allow for attachments.

C. Verify that the new item is displayed in the **DemoList** view:



Title	Item Desc...	Item Cate...	Order Date	Work Email	Order Sta...
Widgets	A bunch of blue widgets	Blue	7/18/2024	Bruce Gordon	On Order

EVALUATION COPY: Not to be used in class.

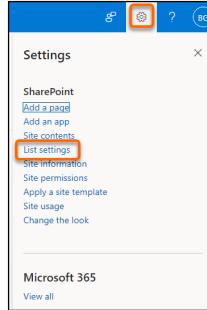
3.4. Column Validation

SharePoint Online provides a powerful feature called column validation that helps ensure data integrity by enforcing specific rules and conditions on the data entered into a list or library column. This feature is particularly useful for maintaining consistent and accurate information across your SharePoint environment.

❖ 3.4.1. Validating a List Column

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

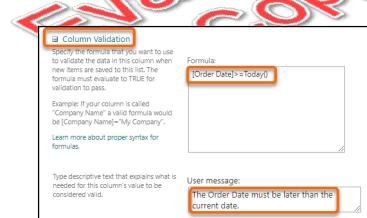
1. Configure validation on the **Order Date** column within the **DemoList**.
 - A. Select the **DemoList** from the **Quick Launch** menu if you are not already on the list.
 - B. Click the **List Settings** under the **Settings** header to open the list configuration options:



C. Click the **Order Date** link within the **Columns** region to navigate to the column settings page:

Columns	
A column stores information about each item in the list. The following columns are currently available in this list:	
Column (click to edit)	Type
Title	Single line of text
Item Description	Single line of text
Item Category	Choice
Order Date	Date and Time
Work Email	Person or Group
Order Status	Lookup
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group

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



Date Formula

The formula in this example will ensure that the user cannot enter a date that is before the current date.

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

2. Test the new column for validation.

- Select the **Demo List** from the **Quick Launch** to navigate back to the main **browse** view of the list.
- Click the **Add new item** link within the **Demo List** to create a new item.

- C. In the required **Title** field, enter Testing and select a past date in the **Order Date** field.
- D. Click the **Save** button. You should get a validation error message similar to the following image:

New item

Error: The Order Date must be later than the current date.

② Title
Testing

② Item Description
Enter value here

③ Item Category
 Red
 Blue
 Green

④ Order Date
1/16/2024

Error: The Order Date must be later than the current date.

⑤ Work Email
Enter a name or email address

⑥ Order Status
Select an option

Save Cancel

Error Message

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

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

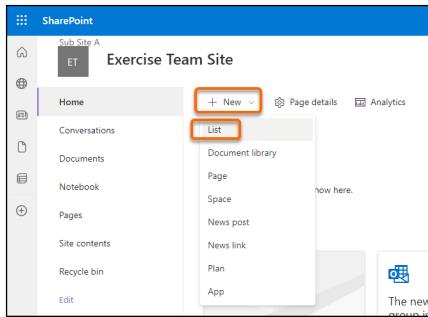
Exercise 3: Working with Team Site Lists

⌚ 5 to 15 minutes

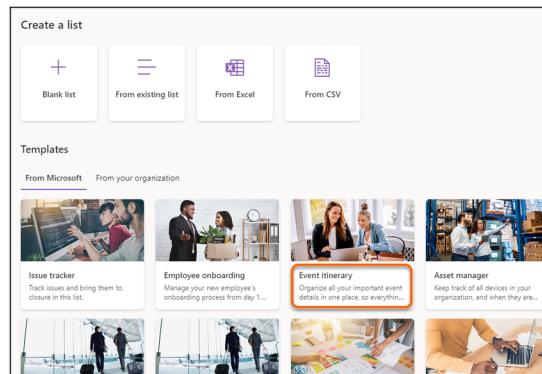
In this exercise, you will work with some of the default list templates in SharePoint Online.

1. Create a new Event Itinerary list.

- A. From the **Home** page of the Team Site, click the **New** drop-down menu and choose **List** from the options:



- B. Click **Event itinerary** from the list of templates:



- C. On the **Event itinerary** summary dialog, click the **Use template** button:

D. Type **Example Event itinerary** for the **Name** and optionally leave the **Description** field empty and click the **Create** button:

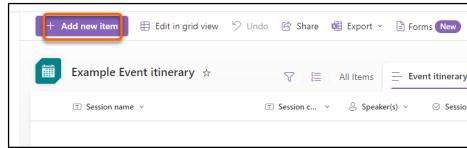
Note

The **Show in site navigation** check-box field is selected by default and will add the list to the site's Quick Launch menu. This can be changed later in the list settings.

2. Create an Event entry:

A. Note the **Example Event Itinerary** link has been added to the **Quick Launch** menu and you are now viewing the default view for the list:

B. Click the **Add new item** link button in the toolbar:



C. Fill in the form with whatever values you like; there are no required fields defined in this list template, and click **Save** when you are done:

New item

Session name
Bigtime Meeting

Session code
Enter value here

Session type
Talk

Describes what kind of a session this is

Description
Experimenting with SharePoint list types.

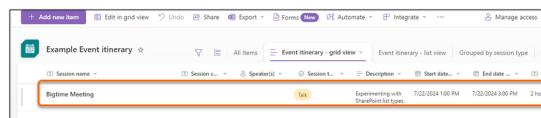
Speaker(s)
Enter a name or email address

Start date and time
7/22/2024

End date and time
100 PM

Scroll to see more fields
 

D. Verify that the new entry is in the list:



E. Feel free to experiment by creating additional events.

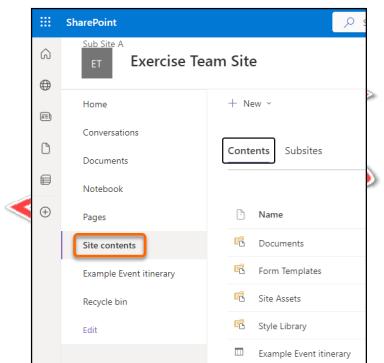
Exercise 4: Create Custom Lists and Columns

⌚ 5 to 15 minutes

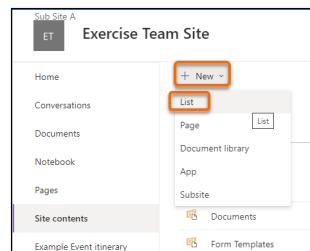
In this exercise, you will learn to create a new list from the **Blank List** template. In addition, you will learn to modify column properties as well as add new custom columns.

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

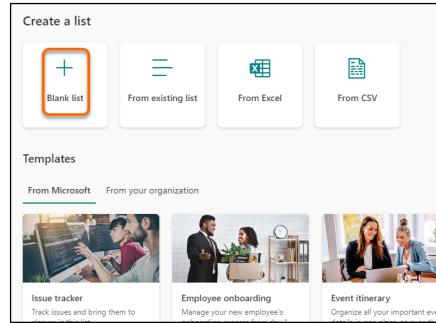
- A. Click the **Site contents** link from the **Quick Launch** menu:



- B. Click **New** and choose **List** from the **Site contents** view:



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

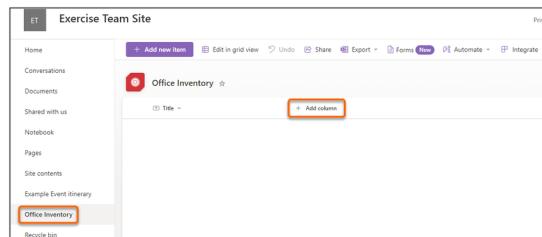


D. Enter **Office Inventory** in the **Name** field and then click the **Create** button:

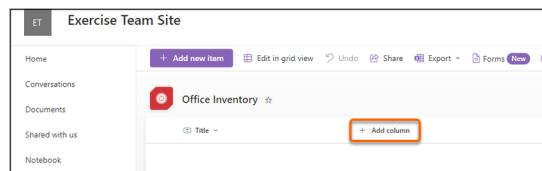


2. Add custom columns to the new **Office Inventory** list.

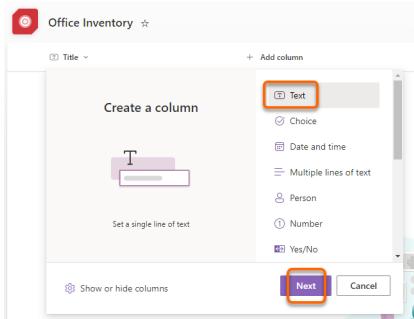
A. Note the **Office Inventory** link was added to the **Quick Launch** menu automatically and that it comes with a text column named **Title** by default:



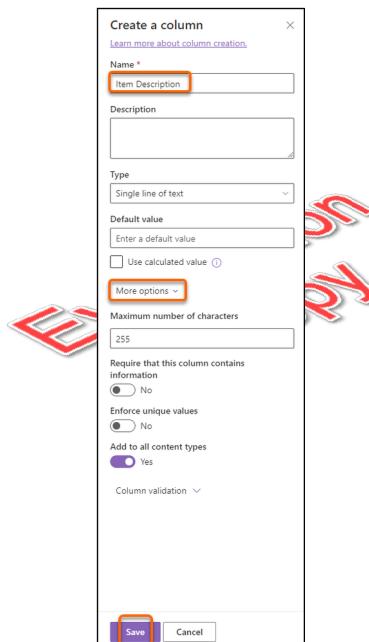
B. Click the **Add column** link at the top of the **Office Inventory** list view:



C. Select **Text** in the **Add column** drop-down menu and click the **Next** button:



D. Enter **Item Description** for the **Name** field and leave the default **Single line of text** as the data type for the column:

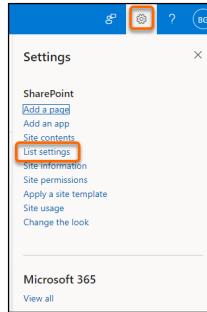


Take a few moments to read through the additional column settings, but the default values are fine for this exercise.

E. Click the **Save** button to create and save the changes to the new list column.

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

- Verify that the newly created **Office Inventory** list is selected in your site's **Quick Launch** menu. Select it if it is not.
- Click the **List Settings** on the **Settings** to open the lists configuration options:

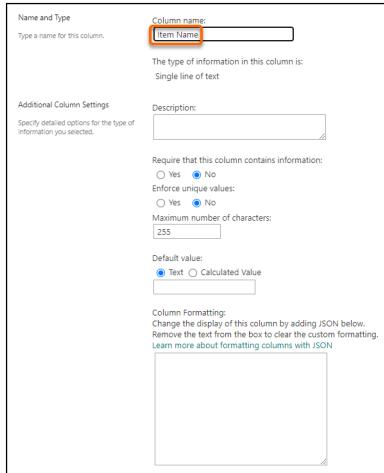


C. Take a moment to read through the list settings page. This page offers links to various list administration task links grouped by category. The group we are going to be working with is **Columns**:

The screenshot shows the 'Office Inventory' list settings page. At the top, it displays 'List Information' with 'Name: Office Inventory' and 'Web Address: https://weEducator.sharepoint.com/teams/ExerciseTeamSite/Lists/Office Inventory/AllItems.aspx'. Below this are three main sections: 'General Settings', 'Permissions and Management', and 'Communications'. Under 'General Settings', there is a link to 'Columns' which is highlighted with a red box. The 'Columns' section contains a table with columns for 'Column (click to edit)', 'Type', and 'Required'. It lists several columns: 'Title' (Type: Single line of text, Required), 'Item Description' (Type: Single line of text), 'Modified' (Type: Date and Time), 'Created' (Type: Date and Time), 'Created By' (Type: Person or Group), and 'Modified By' (Type: Person or Group). Below the table are links for 'Create column', 'Add from existing site columns', 'Column ordering', and 'Indexed columns'. At the bottom, there is a 'Views' section with a table for 'View (click to edit)', 'Default View', 'Mobile View', and 'Default Mobile View'. The 'All Items' view is selected in the 'Default View' column.

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

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



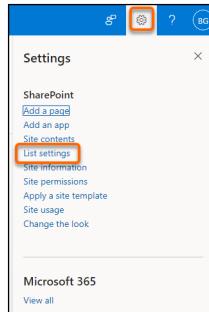
F. Click the **OK** button to save your changes and return to the list settings page.

4. Repeat the previous steps and add three more new columns. Use the table to see names and data types. There are also additional column settings to change.

Column Name	Data Type	Additional Column Settings
Item Type	Choice	Choice list will be Furniture, Equipment, and Software.
Quantity	Number	Decimal places 2
Item Value	Currency	N/A

5. Add a new **Calculated** column.

A. Click the **Settings** icon and choose **List settings** from the drop-down menu:



Note

At the time of this writing, adding a **Calculated** column is not listed as an option from the **Add column** shortcut menu, but you can always do it from the list settings page.

- B. Click the **Create column** link under the **Columns** category.
- C. Enter **Total Value** in the **Column name** field, select **Calculated** for the type and enter the formula **= [Quantity]*[Item Value]** for the **Formula** and change the **The data type returned from this formula is:** option field to **Currency**:

- D. Click the **OK** button to save the new column.
- 6. Click the **Office Inventory** link in either the **Quick Launch** or the site's breadcrumbs to navigate back to the browse view of the **Office Inventory** list:



- 7. Add some new items to the custom list.
- A. Click the **Add new item** button at the top of the **Office Inventory** list view:

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

New item

Item Name
Enter value here

Item Description
Enter value here

Item Type
—

Quantity
Enter a number

Item Value
Enter a number

Attachments
Add attachments

Save Cancel

C. Enter the following values for a new office inventory item and click the **Save** button to save the data back to the list.

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

D. Verify the new inventory item is displayed in the list with the calculated column showing the correct value.

Item Name	Item Description	Item Type	Quantity	Item Value	Total Value
Desk	Front entry desk	Furniture	2.00	\$356.00	\$712.00

E. To add multiple items to the new **Office Inventory** list, you can use the **Edit Grid view** link to enter items in a spreadsheet type of view. You can use the following table for data to input but feel free to use your own items as well. Click Exit Grid view when you are done entering data.

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

F. Compare your list to the following image:

Item Name	Item Description	Item Type	Quantity	Item Value	Total Value
Desk	Front entry desk	Furniture	2.00	\$350.00	\$712.00
Chair	Front entry chair	Furniture	12.00	\$125.00	\$1,500.00
Laptop	Sales person laptops	Equipment	25.00	\$750.00	\$18,750.00
Desk top computer	Front desk check in	Equipment	1.00	\$1,250.00	\$1,250.00
Office 365	Software license	Software	26.00	\$95.00	\$2,470.00

It should look the same or similar depending on whether you used your own items or not. Note the **Item Value** column is formatted as currency for you based on the data type you chose for that column. Also note that Total Value was not something you manually typed in, you entered the Quantity and the Item value, and SharePoint did the math!

Conclusion

**Evaluation
Copy**

In this lesson, you have learned:

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

LESSON 4

Library Basics

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Topics Covered

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

Introduction

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

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4.1. Library Templates

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

There are several factors that define the library templates available to a SharePoint Online site but it starts with the features that have been enabled for the site collection. New library templates can be easily added to a site so the library template choices can vary between different SharePoint instances and even sites within a single instance.

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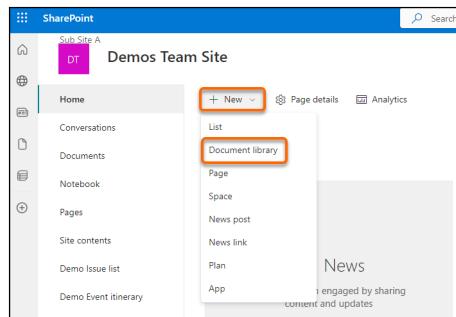
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4.2. Creating Libraries

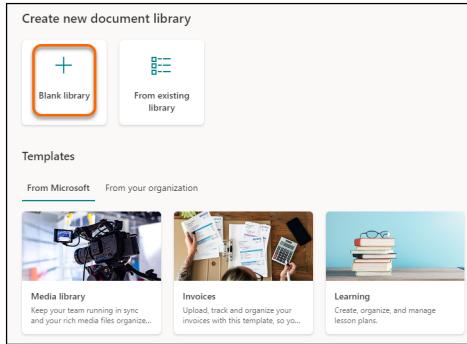
❖ 4.2.1. Creating a Document Library and Adding Columns

The following walk-through will show you how to create a new **Document Library** for creating and storing Microsoft Office documents such as Microsoft Word or Excel. Additionally, the walk-through will show you how to customize the library by adding columns.

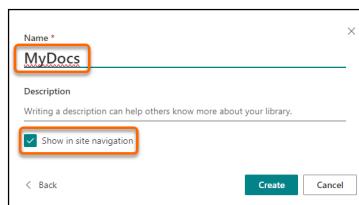
1. Create a new Document Library.
 - A. From the home page of a SharePoint Online Team site, click the **New** menu and then choose the **Document library** menu item:



- B. Click the **Blank library** option from the templates dialog:



C. In the form, enter **MyDocs** in the **Name** field. Make sure the check mark is active for Show in site navigation. Click the **Create** button to complete the process:

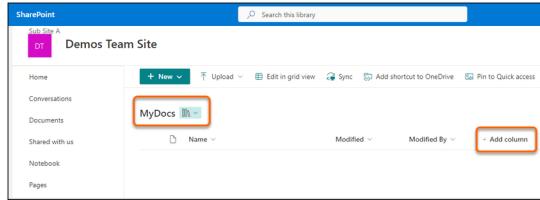


Naming Conventions

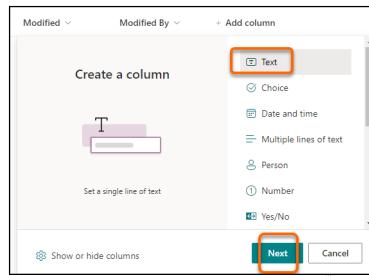
Many website administrators feel strongly about not using spaces when naming a list, library, or new site. The reason for this is that the spaces will be replaced with %20 characters in the URL. This can make the URL difficult to read and links can become convoluted. The title of the list, library, or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

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

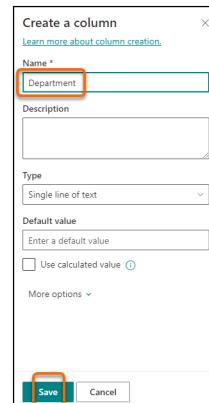
A. Click the **Add column** link at the top of the default view of the **MyDocs** document library:



B. In the **Create a column** dialog, leave column type set to **Text** and click the **Next** button:

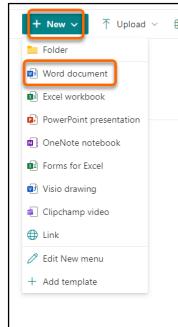


C. Enter **Department** in the **Name** field and leave the rest of the column options at their default settings and click the **Save** button to complete creating the new library column:

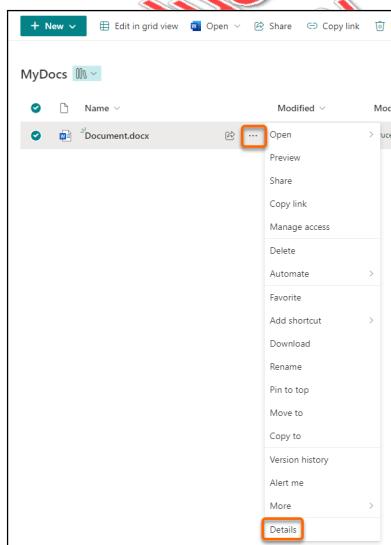


3. Add a new Word document to the **MyDocs** document library and set the **Department** column value.

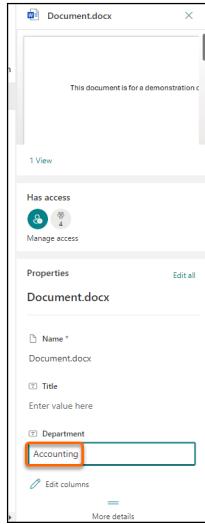
A. Click the **New** button and choose **Word document**:



- B. A new file will open in Word Online. Type the following text in the new blank Microsoft Word document: This document is for a demonstration on SharePoint document libraries.
- C. The file will be saved automatically.
- D. Click the **ellipse** button for the Word document created in the previous step and choose **Details** from the drop-down menu.



- E. In the document details panel, click the **Department** field and enter Accounting in the text box:



Note

You can also modify the **Name** field as well as any other fields that have been defined for the document library using this method.

F. Use the **X** button in the upper right corner of the details panel to close it when you are done.

EVALUATION COPY: Not to be used in class.

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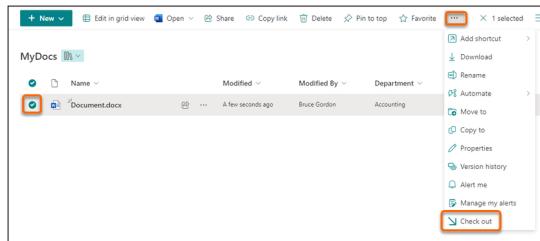
4.3. Managing Documents and Versioning

❖ 4.3.1. Checking Out Documents

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

1. **Check Out** a document from the **MyDocs** library.
 - A. If you are not already there, click the **MyDocs** link in the **Quick Launch** menu.

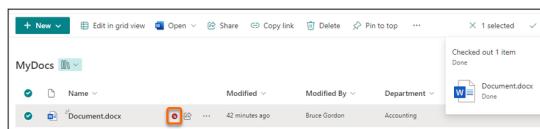
B. Click the **check circle** next to the document you wish to check out to select it, then click the **ellipse** button on the toolbar at the top of the document library view and select **Check Out** from the drop-down menu:



Note

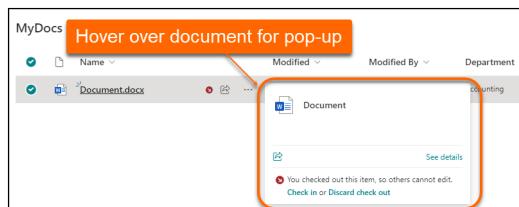
You can also check out a document using the **ellipse** button's menu on the item and choosing **More > Check out**. When you check out a document, you are the only person who can edit the document until you check it back in. This is a great way to make sure that no one else can overwrite your changes while you are working on the document.

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



2. Check the file back in to **MyDocs** library.

A. Hover over the **checked out** document for a couple of seconds and you should see a pop-up dialog that gives you the option to either **Check in** or **Discard checkout**:



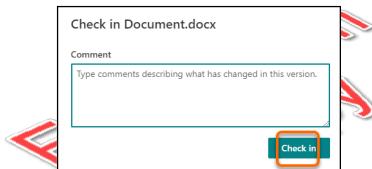
Note

You can also check in or discard check out using the document item menu from the **ellipse** button.

Discard Check Out

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

- B. Click the **Check in** option from the item pop-up.
- C. In the **Check in** dialog form, click the **Check in** button to complete the check in:



❖ 4.3.2. Deleting and Restoring Documents

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

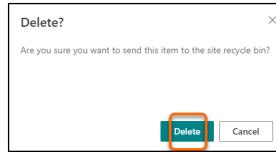
1. Delete a file from the **MyDocs** library.
 - A. If you are not already there, click the **MyDocs** link in the **Quick Launch** menu.
 - B. Click the **check circle** next to the document you wish to delete to select it, then click the **Delete** button on the toolbar at the top of the document library view:



Note

You can also delete a document using the **ellipse** button's menu on the item and choosing **Delete**.

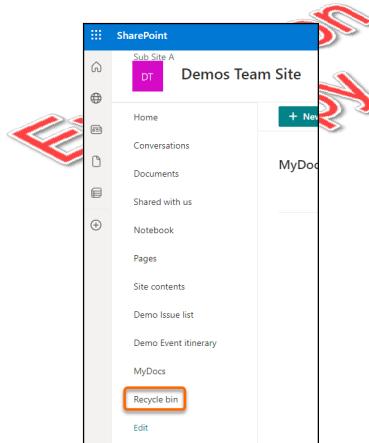
C. Click the **Delete** button on the dialog window asking you to confirm sending the item to the recycle bin:



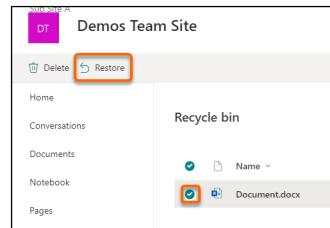
D. Verify that the **Document** has been removed from the **MyDocs** library.

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

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



B. Click to add a check to the check box in the far left column next to the **Document** item to select it and click the **Restore** button at the top of the list to restore the document. Note: If you use a different template you may see a different Restore icon:



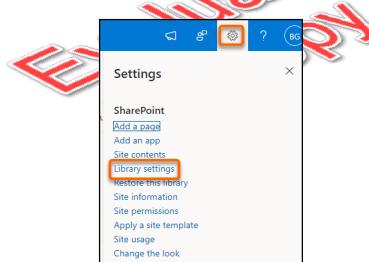
C. Verify that Document.docx is back in the library.

❖ 4.3.3. Versioning

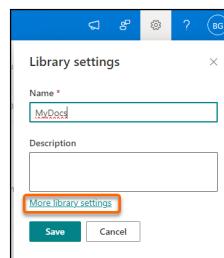
Versioning can be optionally configured in SharePoint so that backup copies of any library list item are automatically created when new changes are applied. This provides the ability for users and administrators to revert to previous versions of items. With libraries, you have the additional option of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

The following walk-through will show you how to view versioning settings and require documents to be checked out in the **MyDocs** document library and test the results.

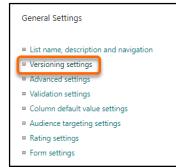
1. Enable versioning in the **MyDocs** document library.
 - A. If you are not already there, click the **MyDocs** link in the **Quick Launch** menu.
 - B. Click the **Library settings** from the **Settings** menu to open the library options:



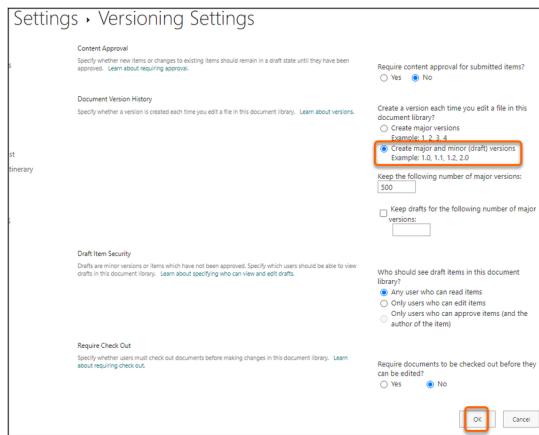
- C. Click the **More library settings** link on the **Library settings** panel:



- D. Click the **Versioning settings** link within the **General Settings** region on the **Settings** page:



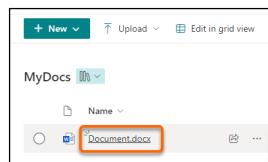
E. In the **Version Settings** page, click the **Create major and minor (draft) versions** option. Click the **OK** button to save the changes:



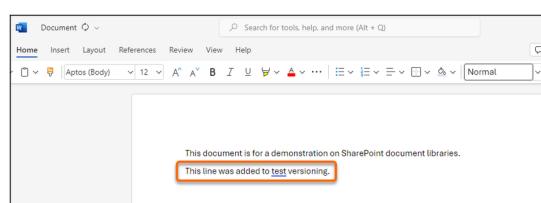
F. Click the **MyDocs** link in the breadcrumbs to navigate back to the **browse** view of the library.

2. Edit the **Document** to test versioning settings.

A. Click the **Document** link in the **MyDocs** library to open the file in Microsoft Word Online for editing:



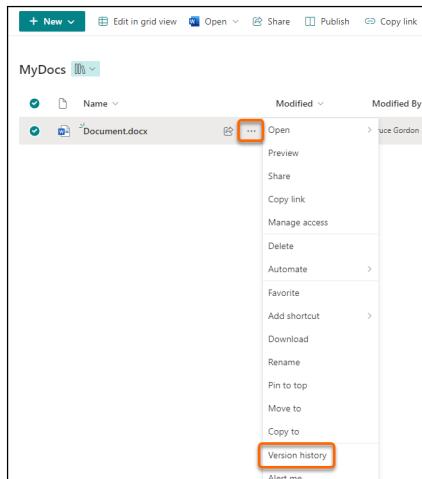
B. Add a new line to the document in Microsoft Word and type the following: **This line was added to test versioning.**



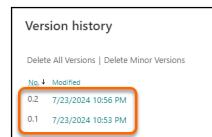
- C. The file saved automatically.
- D. Click the close icon of the Word window.

3. Restore a previous version of **Document** in the **MyDocs** library.

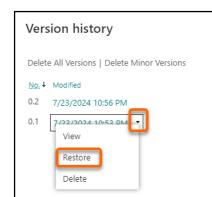
A. Click the menu option **Version History**:



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



C. Click the arrow next to the version before the last change and select **Restore** from the menu:



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

webucator.sharepoint.com says

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

OK

Cancel

E. Note that restoring an older version creates a new version replica of it. Close the **Version History** dialog:



F. Click the **Document** link in the **MyDocs** library to open the file in Microsoft Word Online.

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

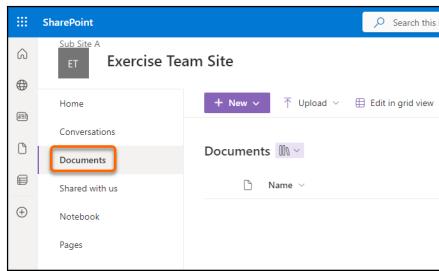
Exercise 5: Working with Team Site Libraries

⌚ 5 to 15 minutes

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

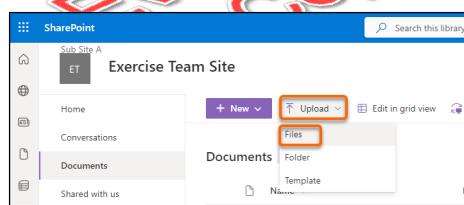
1. Add an existing document to the **Documents** library.

- A. Click the **Documents** link within the **Quick Launch** menu:

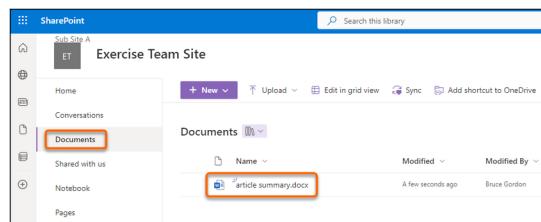


This should take you to the default view of the library.

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

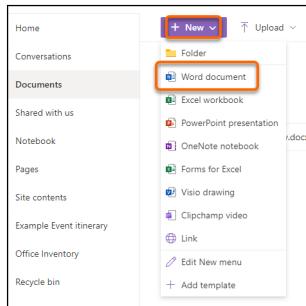


- C. Navigate the files on your computer and find some random file, preferably a Word document or plain text file, it does not matter for this exercise.
 - D. Choose the file and click the **Open** button to upload the file.
 - E. Verify the file is now listed in the **Documents** library and available to anyone with access:



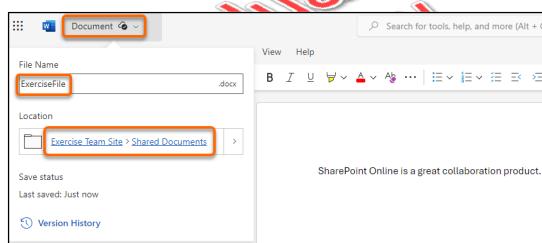
2. Create a new document directly in the **Documents** library.

A. Click the **New** button and choose the **Word document** type of file:



B. Microsoft Word Online should open to a blank page. Enter the following text into the document: **SharePoint Online is a great collaboration product.** The page will save automatically.

C. Click the **Document** menu link in the upper left corner of Word Online and set the **File Name** to **ExerciseFile** in the dialog that opens:



Note

The **Location** field shows you where in the SharePoint site the document is being saved to.

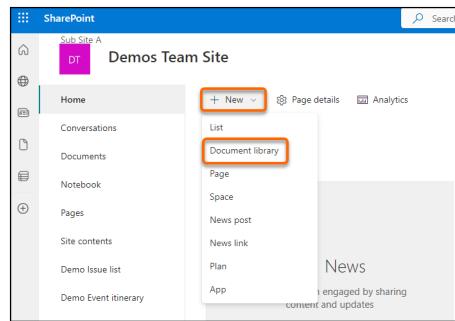
D. Close Microsoft Word Online and note the new document in the library with the new name. You may need to refresh the page if you don't see it in the list of documents.

Exercise 6: Creating Libraries

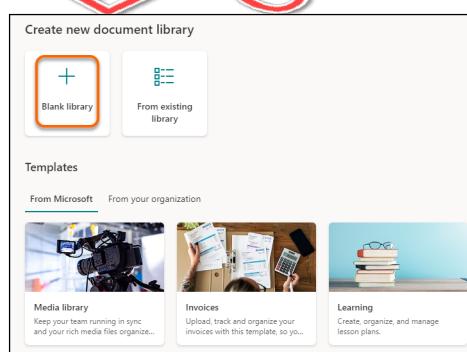
⌚ 5 to 15 minutes

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

1. Create a new library using the Document Library template.
 - A. Click the **Home** link in the site's **Quick Launch**.
 - B. From the home page of a SharePoint Online Team site, click the **New** menu and then choose the **Document library** menu item:

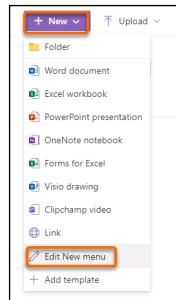


- C. Click the **Blank library** option from the templates dialog:

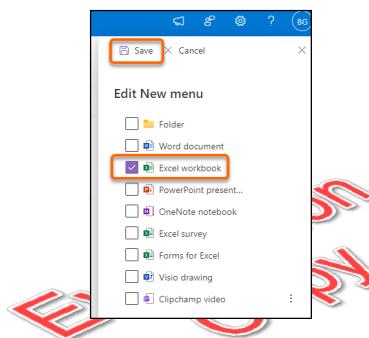


- D. In the form type **ExpenseReports** in the **Name** field. Make sure the check mark is active for Show in site navigation. Click the **Create** button to complete the process:

2. Edit the document type list for the **ExpenseReports** library.
 - A. Click the **New** menu link at the top of the **ExpenseReports** library view and choose **Edit New menu** from the options:



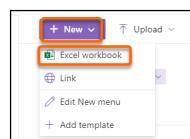
- B. Un-check everything in the list except **Excel Workbooks** and click the **Save** link:



Note

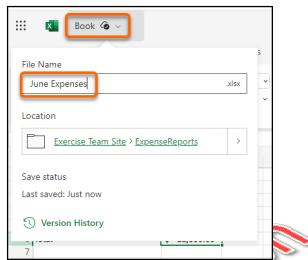
This allows you to limit the types of new documents that can be created from the **New** menu. It does not limit the types of documents you can upload.

3. Create a new item in the new **ExpenseReports** document library.
 - A. Click the **New** button and choose **Excel workbook**:
 - B. Microsoft Excel should open to a blank spreadsheet based on the **Microsoft Excel spreadsheet** template you chose when creating the **ExpenseReports** library.
 - C. Enter data into the spreadsheet. You can use the following image as an example:



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

- D. The file will save automatically.
- E. Click the **Book** drop-down link at the top left of Excel Online and enter June Expenses for the file name:



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

Conclusion

In this lesson, you have learned:

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

LESSON 5

Working With List Library Views

EVALUATION COPY: Not to be used in class.

Topics Covered

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

Introduction

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

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5.1. Default Views

❖ 5.1.1. Explore Default Views

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

- The first thing to do is create a couple of items in the **Demo Event itinerary** list in order to have something to display in the views.

- Click the **Demo Event itinerary** link in the site's **Quick Launch**.
- Click the **Add new item** link in the list to open the **New Item** form and use the following table for information to fill in the form:

Item 1

Field	Data
Session name	Client Review
Session type	Panel
Description	Rank and process requests

- Click the **Save** button on the **New Item** dialog to save the task to the **Demo Event itinerary** list.
- Repeat the previous two steps with the following information to create a second item:

Item 2

Field	Data
Session name	New Hire Onboarding
Session type	Talk
Description	Welcome the new hires!

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

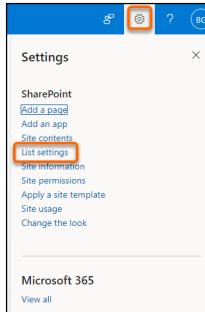
- Select the desired view from the links along the top of the list:

Security-Trimmed Views

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

- Manage the views for the **Demo Event itinerary** list.

A. Click the **List Settings** button from settings:



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

View (click to edit)	Default View	Mobile View	Default Mobile View
All items	✓	✓	✓
Event itinerary - grid view	✓	✓	✓
Event itinerary - list view		✓	
Grouped by session type		✓	
Create view			

C. Click the **Event Itinerary - grid view** link from within the **Views** region to open the **Edit View** page for the view.
D. Note the options (scroll down to see everything):

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

View Name: [View this page](#)

Address of this view: [https://webcalculator.sharepoint.com/teams/DemosTeamSite/Lists/Demo Event itinerary/AllItems.aspx](https://webcalculator.sharepoint.com/teams/DemosTeamSite/Lists/Demo%20Event%20itinerary/AllItems.aspx)

This view appears by default when visitors follow a link to this list. If you want to delete this view, first make another view the default.

Columns
Select or clear the check box next to each column to determine how it will be displayed in this view. To specify the order of the columns, select a number in the Position from Left box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Session name (linked to item with edit menu)	1
<input checked="" type="checkbox"/>	Session code	2
<input checked="" type="checkbox"/>	Speaker(s)	3
<input checked="" type="checkbox"/>	Session type	4
<input checked="" type="checkbox"/>	Description	5
<input checked="" type="checkbox"/>	Start date and time	6
<input checked="" type="checkbox"/>	End date and time	7
<input checked="" type="checkbox"/>	Duration	8
<input checked="" type="checkbox"/>	Capacity	9
<input checked="" type="checkbox"/>	Location	10
<input checked="" type="checkbox"/>	Notes	11
<input checked="" type="checkbox"/>	App Created By	12

View Settings

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

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

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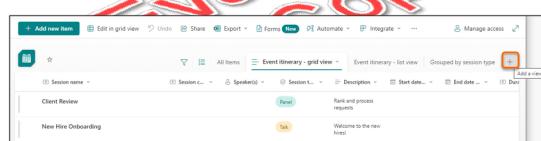
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5.2. Custom Views

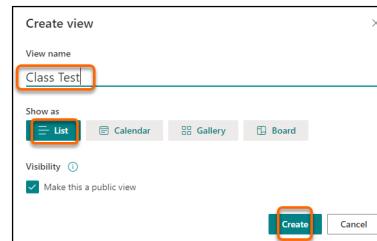
❖ 5.2.1. How to Create a Custom View

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

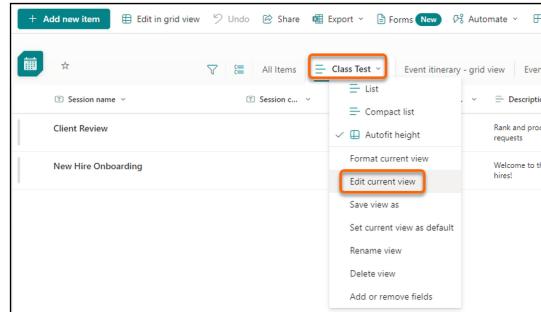
1. Create a custom view of **Demo event itinerary** using the **Standard View** format.
 - A. Click the **Demo Event itinerary** link in the **Quick Launch** menu.
 - B. Click the **+** icon at the end of the current list of views to create a new view:



- C. In the **Create view** dialog, type **Class Test** for the **View name** and note that **List** is the default selection from the **Show as** region and click **Create**:



- D. Select **Edit current view** from the drop-down menu for the new **Class Test** list view:

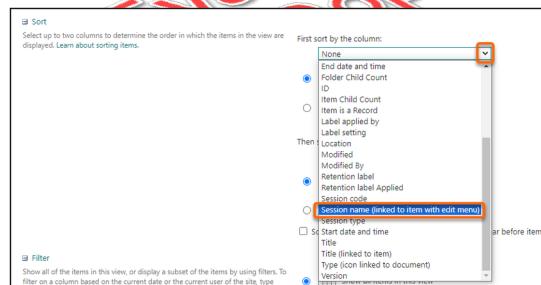


E. Select the following from the **Columns** region; everything else should be deselected.

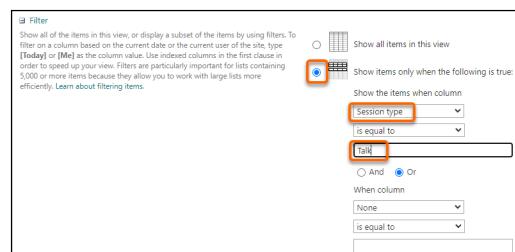
- i. Session name (linked to item with edit menu)
- ii. Session type
- iii. Description



F. Scroll down to the **Sort** region and select **Session Name** for the **First sort by the column** selection:



G. Scroll down to the **Filter** region and select **Session Type** for the **Show the items when column** selection, leave the **operator** drop-down set to **is equal to** and type **Talk** in the **value** field text box:

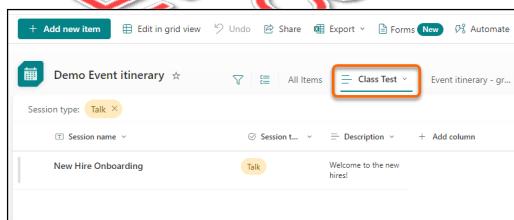


H. Note the remaining view options and their collapsed regions but leave them at their default settings:



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

2. Once the new view has been successfully created, SharePoint will automatically navigate you back to the **Browse** tab with the new view **Class Test** selected. The items listed should only include events that have their Session Type field set to Talk:



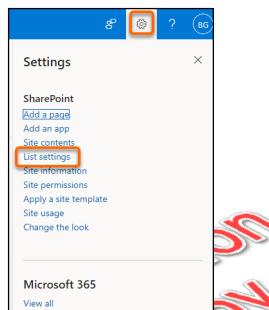
3. Click the **Demo Event itinerary** link in the **Quick Launch** and note how the view is reset back to the default **Event itinerary - grid view**. You could optionally set the custom view **Class Test** as the default view for the list.

Exercise 7: Creating Public and Personal Views

 5 to 15 minutes

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

1. Create a new public view for the **Office Inventory**.
 - A. Click the **Office Inventory** link from the site's **Quick Launch**.
 - B. Click the **Settings** menu and then choose the **List Settings** menu item:



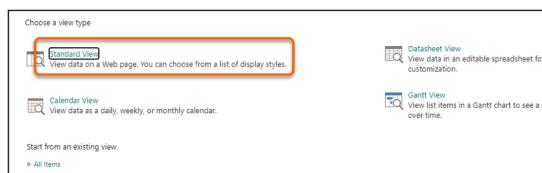
- C. Click the **Create view** link in the **Views** section of the **List Settings** page:



Note

You can also use the **+** icon in the main view of the list to add new views.

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



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

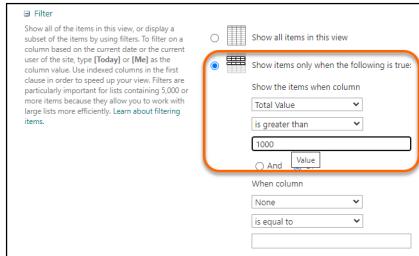


F. In the **Columns** section of the **Create View** form, select only the following columns:

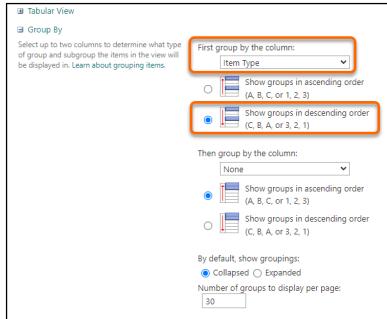
- Item Name (linked to item with edit menu)**
- Item Type**
- Total Value**



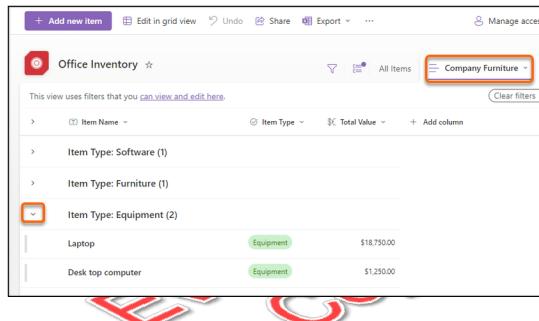
G. In the **Filter** section, choose the **Total Value** column in the **Column to Filter** drop-down list. Select **is greater than** in the **operator** drop-down field. Enter **1000** in the **Value** field:



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

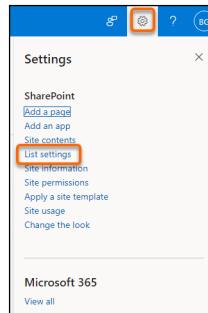


- I. Take a few moments to read through the rest of the **Create View** forms options. Leave them at their default values.
- J. Click the **OK** button to save the new view and see the results.
- K. Note how the new view looks:

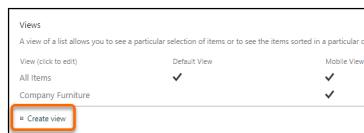


2. Create a new personal view for the **Office Inventory**.

- A. Click the **Settings** menu and then choose the **List Settings** menu item:



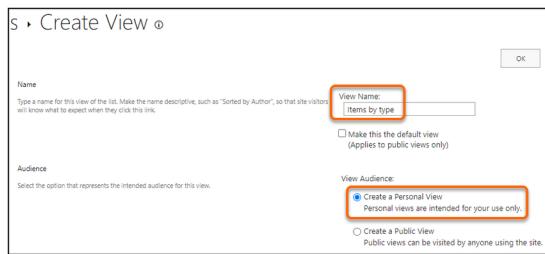
- B. Click the **Create view** link:



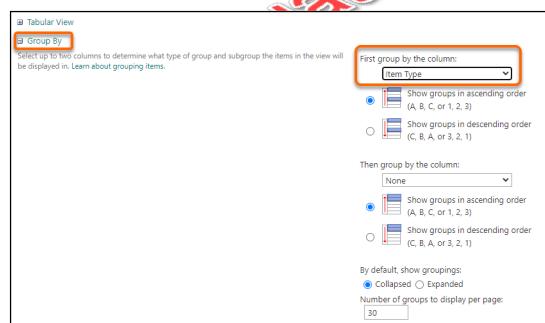
C. Click the **Standard View** format option link:



D. Type **Items by type** in the **View Name** field and change the **View Audience** field set to **Create a Personal View**:

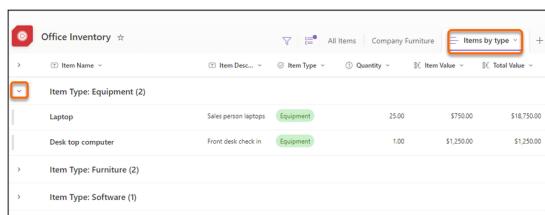


E. In the **Group By** section, choose the **Item Type** column in the drop-down list:



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

G. Note how the new view is selected. It is only available to you:



Conclusion

In this lesson, you have learned:

1. How to use default views built into lists and libraries.
2. How to create personal views.
3. How to create shared views.
4. How to configure views.
5. How to set the default view for a list or library.

Evaluation
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LESSON 6

Working With Sites

EVALUATION COPY: Not to be used in class.

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

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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.

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6.1. Site Templates

❖ 6.1.1. Overview

Site templates in SharePoint Online are pre-configured layouts and settings that allow users to create new sites quickly and efficiently, tailored to specific needs and functions.

❖ 6.1.2. Types of Site Templates

1. **Team Site** — Ideal for team collaboration, these templates include document libraries, task lists, and communication tools.
2. **Communication Site** — Designed for sharing news, reports, and other information across an organization, with a focus on visuals and broad communication.
3. **Hub Site** — Centralized site templates that connect multiple team and communication sites for unified navigation, search, and branding.

❖ 6.1.3. Common Features

1. **Document Libraries** — For storing and organizing documents and files.
2. **Lists** — For tracking tasks, issues, or other structured data.
3. **Pages** — Customizable pages to display content, news, and other information.
4. **Web Parts** — Modular components that add functionality and content to pages, such as text, images, documents, and lists.

❖ 6.1.4. Customization

While site templates offer predefined configurations, they are highly customizable. Users can modify the layout, add or remove web parts, change themes, and tailor the site to their specific needs.

❖ 6.1.5. Usage Scenarios

1. **Project Management** — Use team sites to manage project documents, tasks, and communications.
2. **Intranet Portals** — Utilize communication sites to create engaging intranet portals for organizational news and resources.
3. **Departmental Sites** — Create hub sites to centralize departmental resources, documents, and communication.

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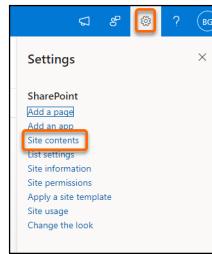
6.2. Creating Sites

❖ 6.2.1. Creating a Team Site

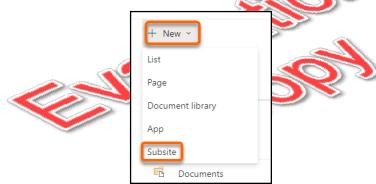
In this walk-through, you will learn to create new child sites using the **Team Site** template.

1. Create a new child site named **Marketing** using the **Team Site** template.

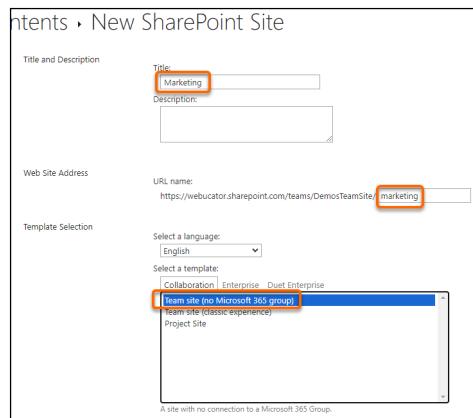
- A. Click the **Site Contents** link in the **Settings** menu:



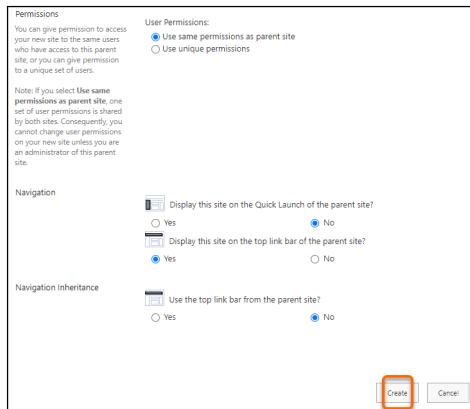
- B. Click the **New** link and choose **Subsite**:



- 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:



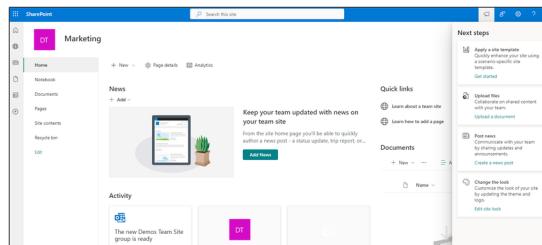
D. Scroll down and note the options available for permissions and navigation. Leave the options at their default settings and Click the **Create** button to complete the process:



Navigation Settings

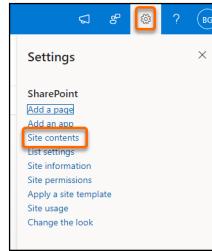
In a later walk-through in this lesson, you will learn how to change the navigation settings of the **Marketing** site. In a later part of this course, you will change the permissions.

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:

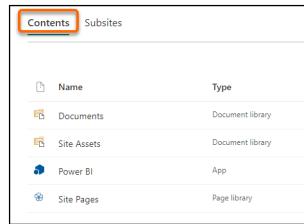


2. View the lists and libraries that come with the **Team Site** template.

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

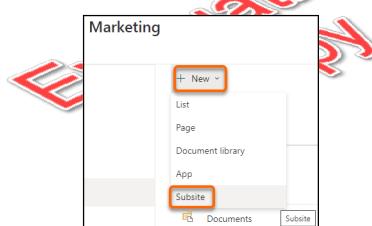


B. Take a few moments to look through the Lists and Libraries created by default from the **Team Site** template:



3. Create a new child site to **Marketing** using the **Project Site** template.

A. Click the **New** link at the top of the page and choose **Subsite**:



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:

Intents • New SharePoint Site

Title and Description

Title: **Subsite**

Description:

Web Site Address

URL name: **Subsite**

Template Selection

Select a language: English

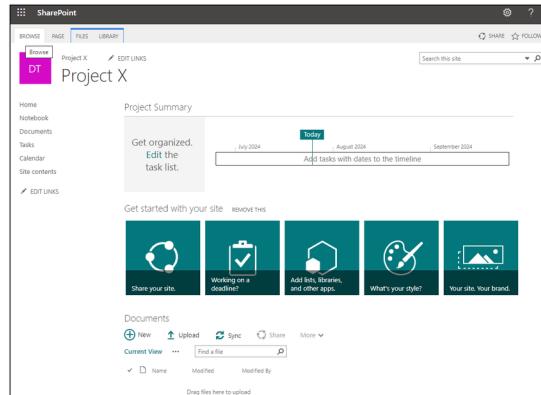
Select a template:

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

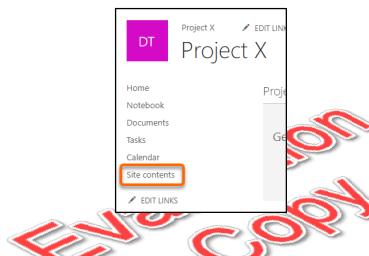
A site for managing and collaborating on a project. This site template brings all status, communication, and artifacts relevant to the project into one place.

4. Explore what comes with the **Project Site** template.

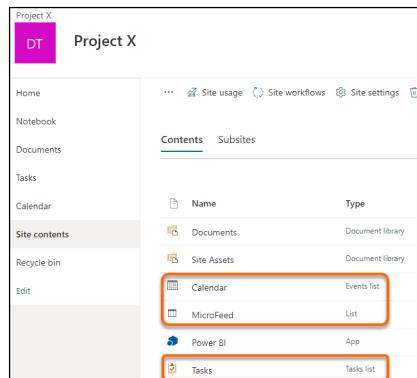
A. Note that the **Project Site** home page has a **Project Summary** view:



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



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



EVALUATION COPY: Not to be used in class.

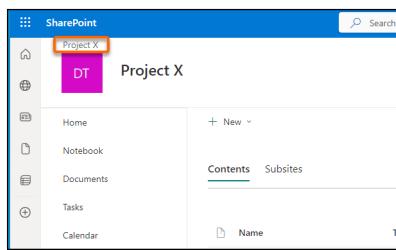


6.3. Site Navigation

❖ 6.3.1. Managing Site Navigation

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

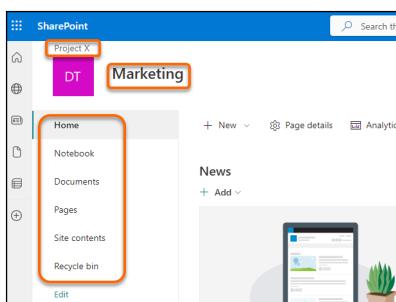
1. Verify that both the **Project X** and the **Marketing** sites have separate top link bars and Quick Launches.
 - A. Verify that you are currently in the **Project X** home page by clicking the **Project X** link in the top link bar:



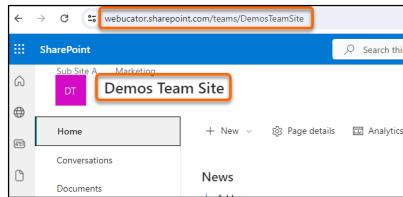
- B. Note that there are no additional links in the **Top link bar** of the **Project X** site.
 - C. There is currently no obvious way to navigate back to the parent site **Marketing** from the child site **Project X**. To navigate back to **Marketing**, remove the text in browser's address field back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



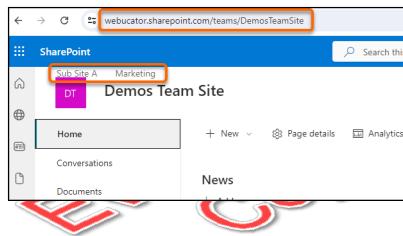
- D. Note that now the **Top link bar** has a **Marketing** link as well as a **Project X** link. Also note that the **Quick Launch Menu** lists only content from this site:



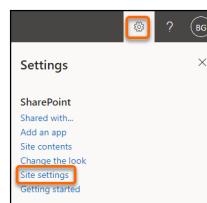
E. Just as before, there is yet no obvious way to navigate to the parent site of **Marketing**. To navigate back to **DemoTeamSite**, the root site in this demo, remove the text in browser's address field back to **before Marketing** as shown in the screen capture:



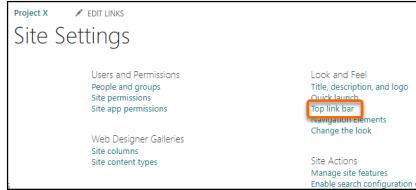
F. Note that the root parent site currently has the two links in the **Top link bar** as shown in the image. The larger **Demos Team Site** link sitting just below the site's **Top link bar**, links to the Home page for this site. Additionally, the **Quick Launch Menu** only has links for content within this site:



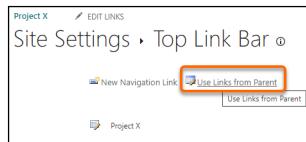
2. Configure the **Project X** site to share the **Top link bar** of its parent site **Marketing**.
 - A. Navigate to the **Project X** site by first clicking the **Marketing** link in the **Top link bar** of the root parent site and then clicking the **Project X** link in the **Top link bar** of the **Marketing** site.
 - B. Within the **Project X** site, Click the **Settings** button and select the **Site Settings** link from the menu:



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



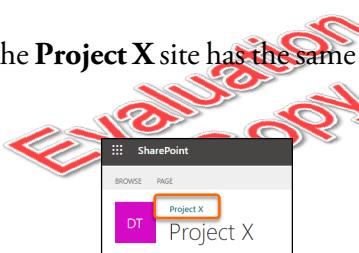
D. Click the **Use Links from Parent** link on the **Top link bar** settings page:



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



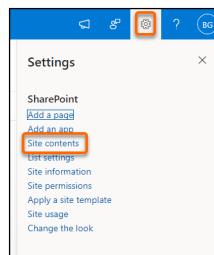
F. Verify that now the **Project X** site has the same **Top link bar** as the parent **Marketing** site:



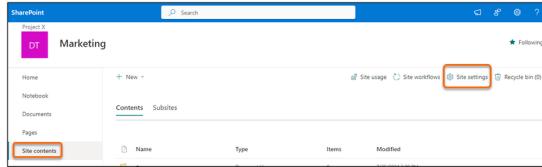
G. Note we are not done yet, we will need to manually navigate back to Marketing for the next step.

3. Configure the **Marketing** site to share the **Top link bar** of its parent site.

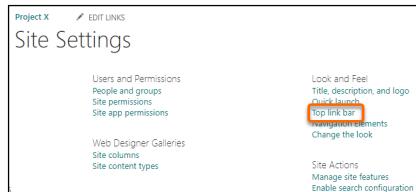
A. Within the **Marketing** site, Click the **Settings** button and select the **Site Contents** link from the menu:



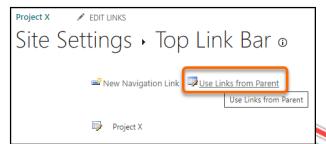
B. Click Site Settings from the top menu:



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



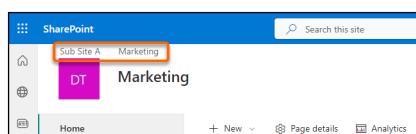
D. Click the **Use Links from Parent** link on the **Top link bar** settings page:



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



F. Verify that now the **Marketing** site has the same **Top link bar** of the parent:

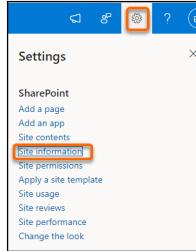


4. Add a new link to the **Top Link Bar** of the root parent site.

A. Manually navigate to the root parent site by removing **marketing** from the browser's URL field:



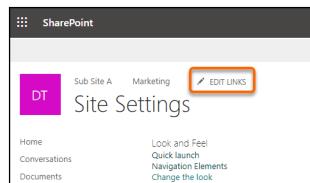
B. While in the root parent site, Click the **Settings** icon and select the **Site information**:



C. Click the **View all site settings** link on the **Site information** panel:

The Site Information panel is a quick way to access the Site Settings page. This is an alternative way to navigate than using the link in Site contents.

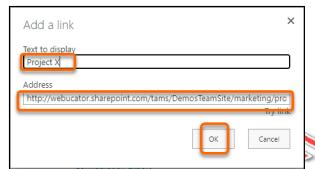
D. Click the **EDIT LINKS** link at the end of the **Top Link Bar**:



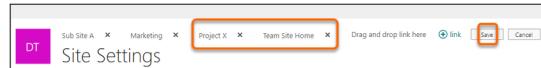
E. Click the **link** with the **plus** icon in the editable **Top Link Bar** region:



F. On the **Add a link** dialog, enter the full path to the **Project X** subsite of **Marketing**, in my case that is <http://webucator.sharepoint.com/teams/DemosTeamSite/marketing/projectx>, in the **Address** field. In the **Text to display** field, enter **Project X**. Click the **OK** button to save your changes:



G. Repeat the previous steps to add a link for the root site, in my case that is <http://webucator.sharepoint.com/teams/DemosTeamSite>, you can set the text to something like **Team Site Home** or whatever you want. It should look similar to the following:



H. Click the **Save** button to save the changes to the root site's **Top Link Bar**.
I. Verify that the new links in the **Top Link Bar** work by clicking each one.



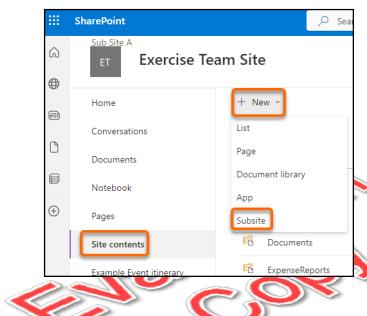
Exercise 8: Creating Team Sites

⌚ 5 to 15 minutes

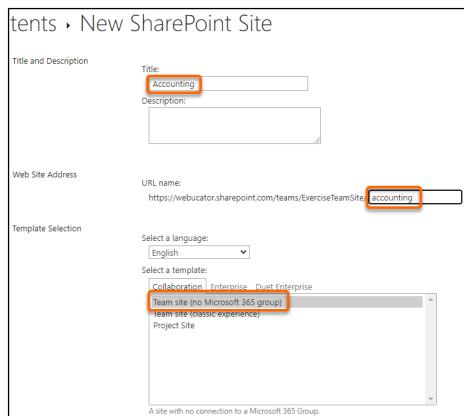
In this exercise, you will create a new site based on the **Team Site** template in the class sample site. In addition, you will test and modify the navigation options from parent site to child site.

1. Create a new child site using the **Exercise Team Site** template.

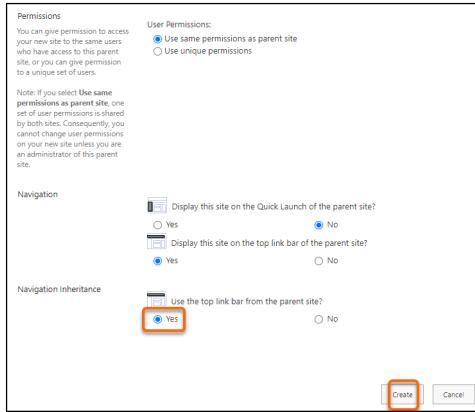
- A. Click the **Site Contents** link in the **Quick Launch** menu.
- B. Click the **New** link and choose **Subsite**:



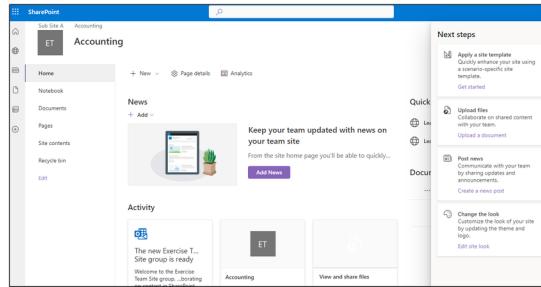
- C. Type Accounting in the **Title** field and accounting in the **URL name** field. Ensure that the **Team Site** template is selected in the **Select a template:** option:



- D. Scroll down and note the options available for permissions and navigation. Set Navigation Inheritance to **Yes** and click the **Create** button to complete the process:

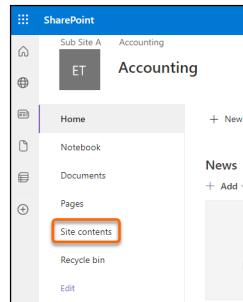


E. You will automatically be navigated to the **Home** page of the new **Accounting** site. If you have not done much customization to the parent site it's hard to tell that this is a different site:



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:

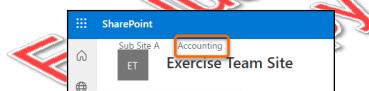
Contents		Subsites
	Name	Type
Documents	Document library	
Site Assets	Document library	
Power BI	App	
Site Pages	Page library	

3. Navigate back to the root parent site.

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



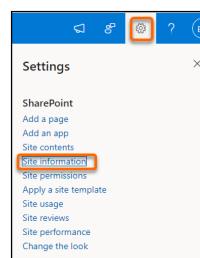
B. Note that the new **Accounting** site has a link on the parent site's top navigation bar:



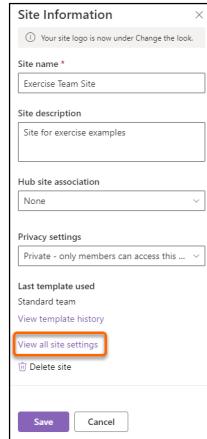
This is because we set the Navigation Inheritance to **Yes** when we created the site. But since there is not an entry for the parent site in its own top navigation bar, we will need to manually add it.

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

A. While in the root parent site, Click the **Settings** icon and select the **Site information**:



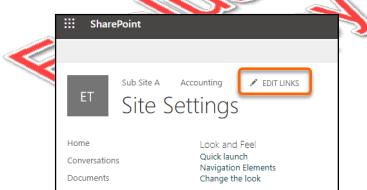
B. Click the **View all site settings** link on the **Site information** panel:



Site Information Panel

The **Site information** panel is a quick way to access the **Site Settings** page. This is an alternative way to navigate than using the link in **Site contents**.

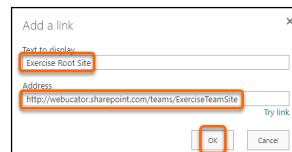
C. Click the **EDIT LINKS** link at the end of the **Top Link Bar**:



D. Click the **link** with the **plus** icon in the editable **Top Link Bar** region:



E. On the **Add a link** dialog, enter the full path to the **Exercise Team Site** root site, in my case that is <http://webucator.sharepoint.com/teams/ExerciseTeamSite>, in the **Address** field. In the **Text to display** field, enter **Exercise Root Site**. Click the **OK** button to save your changes:



- F. Click the **Save** button to save the changes to the root site's **Top Link Bar**.
- G. Verify that you can navigate to the **Accounting** site and back to the **Exercise Root Site** using the shared **Top Link Bar** by clicking each one:



Conclusion

In this lesson, you have learned:

- 1. What Site Templates are.
- 2. About the different types of Site Templates that come "out of the box" with SharePoint.
- 3. How to create a new site using Site Templates.
- 4. How to create a Project site.
- 5. How to create a Team site.
- 6. How to manage the sites listed in the top link bar.

**Evaluation
Copy**

LESSON 7

Page Content

EVALUATION COPY: Not to be used in class.

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

**Evaluation
Copy**

SharePoint Online allows users to build dynamic and interactive web pages using web parts and sections. These elements are essential for organizing and displaying content effectively on SharePoint sites.

❖ Web Part Pages

Web part pages in SharePoint Online are customizable pages that can host multiple web parts. These pages are designed to display various types of content and provide users with interactive elements to enhance collaboration and productivity. Key features include:

1. **Customization** — Users can add, move, and configure web parts to tailor the page to their specific needs.
2. **Interactivity** — Web parts can include interactive features such as forms, media players, and embedded content.
3. **Collaboration** — Web part pages facilitate team collaboration by integrating document libraries, lists, and communication tools.

❖ Sections

Sections are the building blocks of a web part page. They help organize the layout and structure of the page, making it easier to design and navigate. Sections can be customized in the following ways:

1. **Layouts** — Sections can have different layout options, such as single column, two columns, or three columns, to organize content efficiently.
2. **Backgrounds** — Users can apply background colors or images to sections to enhance visual appeal and brand consistency.
3. **Spacing** — Adjusting spacing within sections helps create a clean and readable design.

By combining web part pages and sections, SharePoint Online provides a flexible and powerful platform for creating content-rich, visually appealing, and interactive web pages that meet the diverse needs of organizations.

Using web parts and sections, SharePoint Online allows users to create and customize web pages by adding various types of content. This flexibility helps to meet the needs of different organizational functions and enhance collaboration. The key content types that can be added to a SharePoint Online web page include:

❖ Text

Users can add and format text using the Text web part. This includes basic formatting like bold, italic, and underline, as well as more advanced options such as headers, bullet points, and hyperlinks.

❖ Images

Images can be inserted using the Image web part. Users can upload images from their computer, select from the SharePoint library, or link to images from external sources.

❖ Videos

Videos can be added through the Stream or Video web parts. These allow embedding videos from Microsoft Stream, YouTube, or other video hosting platforms directly into the page.

❖ Documents

The Document Library web part allows users to display and manage documents stored in SharePoint libraries. It provides easy access to files and supports features like version control and collaborative editing.

❖ Lists

Data from SharePoint lists can be displayed using the List web part. This can include tasks, contacts, events, or any custom list created within SharePoint.

❖ Links

The Quick Links web part is used to create a set of hyperlinks to internal or external pages, documents, or other resources, providing quick navigation options.

❖ Calendars

The Calendar web part displays events from SharePoint calendars, helping users to keep track of important dates and deadlines.

❖ Embedded Content

The Embed web part allows users to embed content from external websites, such as maps, social media feeds, or interactive tools, enhancing the functionality of the SharePoint page.

❖ Forms

Using the Forms web part, users can embed Microsoft Forms to collect information or feedback from site visitors directly on the SharePoint page.

❖ Dynamic Content

The News web part displays the latest news posts, and the Highlighted Content web part dynamically shows content based on filters such as recently added or modified items.

EVALUATION COPY: Not to be used in class.

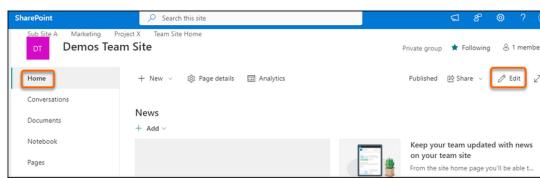
*

7.1. Site Pages

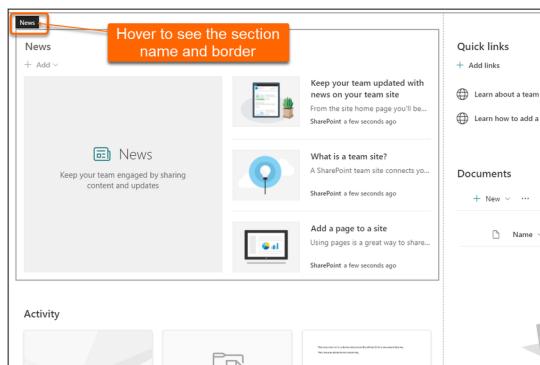
❖ 7.1.1. Editing the Team Site Home Page

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

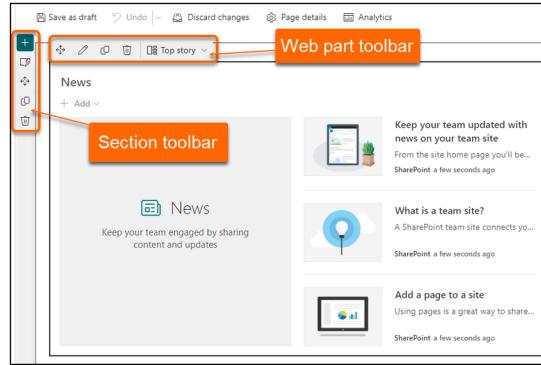
1. Navigate to the team site in your browser.
2. On the **Home** page of the team site, click **Edit**:



3. Explore the options available for editing the page. The page is divided into sections and each section may have a web part or text.
 - A. Note that when you are in edit mode and hover over different sections of the page, a border and label will appear defining the section, such as **News** in the following image:

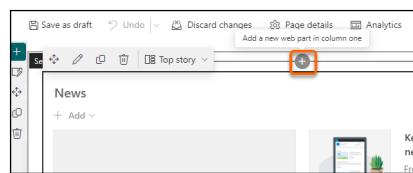


- B. Click somewhere inside the **News** section and note the toolbars that let you modify the section as well as the web parts within:

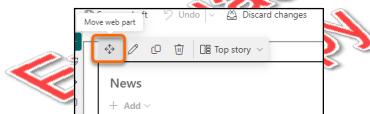


C. Hover over the icons in the web part toolbar to see the options.

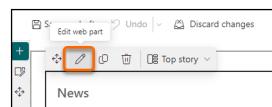
i. Click the **+** to add a new web part to the section:



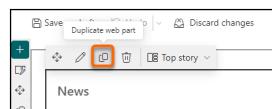
ii. Click the **Move** icon to move the web part up or down in the section:



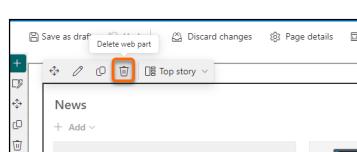
iii. Click the **Edit** icon to edit the web part:



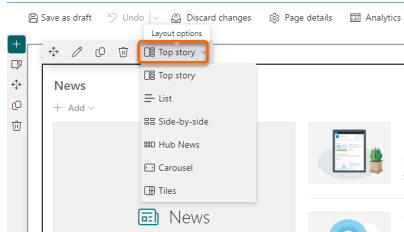
iv. Click the **Duplicate** icon to make a copy of the web part:



v. Click the **Delete** icon to remove the web part from the section:

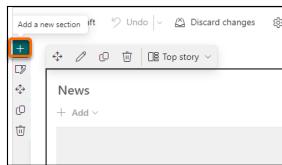


vi. Click the **Layout options** icon to select a different layout for the web part in the section:

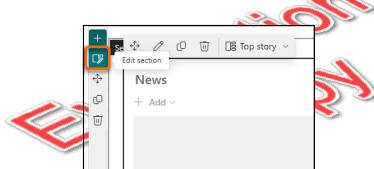


D. Hover over the icons in the section toolbar to see the options.

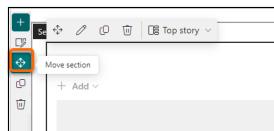
i. Click the **+** plus icon to add a new section:



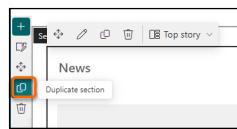
ii. Click the **Edit** icon to edit the section:



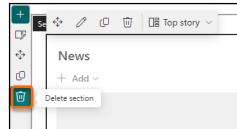
iii. Click the **Move** icon to move the section up or down on the page:



iv. Click the **Duplicate** icon to make a copy of the section:



v. Click the **Delete** icon to remove the section from the page:



4. Explore the options for saving or discarding changes to a site's page.

- Click the **Republish** button to save your changes and make the changes immediately visible to visitors:
- Click the **Save as draft** icon 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:
- Click the **Discard changes** icon to discard your changes and return the page to pre-edit content:



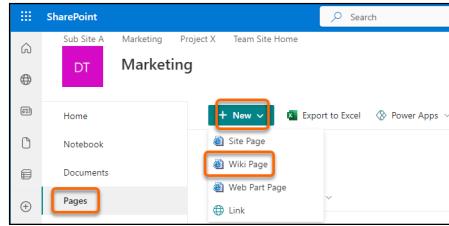
EVALUATION COPY: Not to be used in class.

7.2. Wiki Library Pages

❖ 7.2.1. Create a new Wiki Page

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

- Create a new wiki page in the **Marketing** subsite.
 - Navigate to the **Marketing** team site in your browser.
 - In **Pages** library, click **New** and choose **Wiki page**:



C. Name the page **Sample** page and click **Create**:

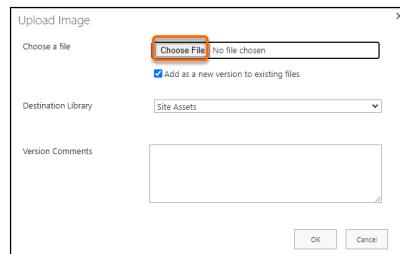


2. Add an image to the new wiki page.

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



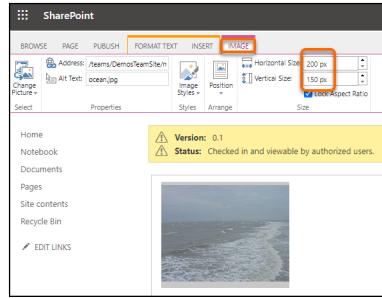
B. In the **Upload Picture** dialog form click the **Browse** button to open the **Choose File to Upload** dialog window:



Note

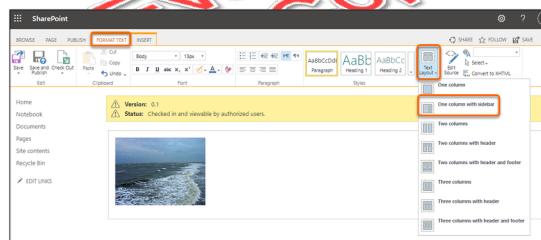
The image will default to upload to the **Site Assets** library in a team site but you can pick a different destination.

- C. 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:
- D. Note that if the image size is not perfect, you can use the image tab to set the desired size:



- 3. Add some text to the new wiki page.

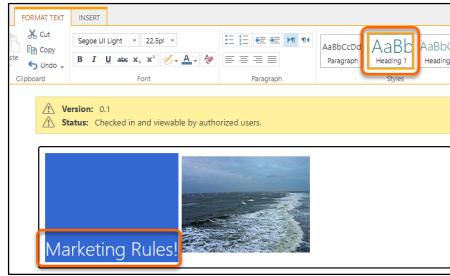
- A. With the **Marketing** site's new page still in edit mode, click the **Format Text** tab to open the toolbar. Click the **Text Layout** drop-down button and select **One column with sidebar** from the menu of options:



- B. Add text above the image added earlier by hovering and clicking just to the left of the image so that the insertion point is located right next to the image and type the following text to the left of the image **Marketing Rules!**:



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



D. With your insertion point between the new text and the image, use your **Return** keyboard key to move the image below the new heading, it should look like the following:

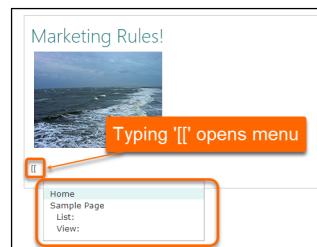


4. Add a link to the **Site Assets** library.

A. Hover and click to add your insertion point just to the right of the image added earlier and add a **Return** to move the insertion point down by a line:



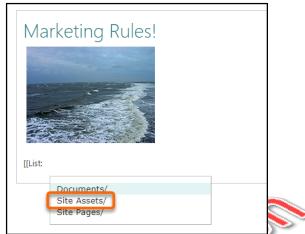
B. On the new line type the following: [[. A menu will open after you type the second “[”, select **List:** from the menu:



Note

This is a shortcut way of creating a hyperlink in a wiki page to content on the same site. You can also use the **INSERT** tab on the toolbar and the **Link** button for both local and external content.

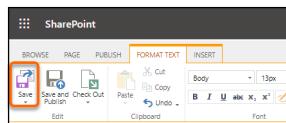
C. From the second menu, select **Site Assets/** from the list:



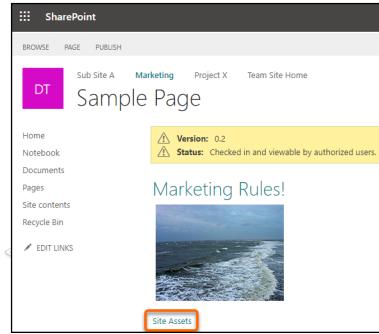
D. A matching set of **]]** should be automatically added to the end of what we entered in the previous steps. The completed link should look similar to the following image:



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



A. Verify the wiki-style link to **Site Assets** works by clicking it and verifying it takes you to the **Site Assets** library:



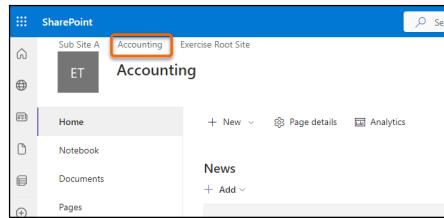


Exercise 9: Working with Site Pages

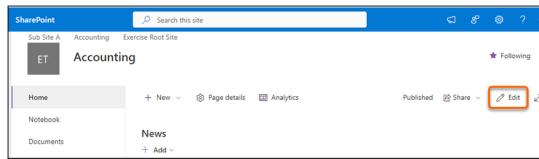
⌚ 5 to 15 minutes

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

1. From the **Exercise Team Site**, navigate to the **Accounting** site:

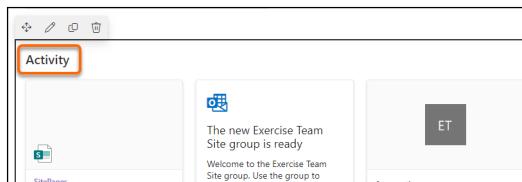


2. Click **Edit** to enter edit mode:

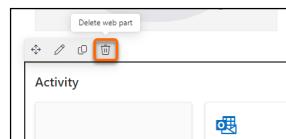


3. Remove the **Activity** web part from the home page.

- A. Click **Activity** web part to edit it:

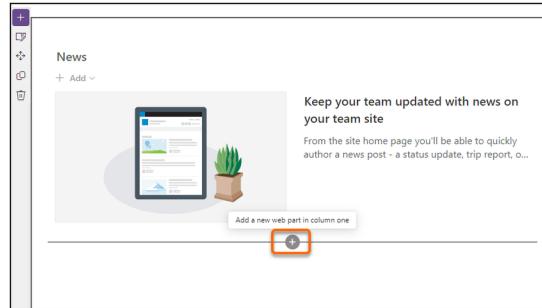


- B. Click the **Delete web part** trashcan icon above the selected **Activity** web part:

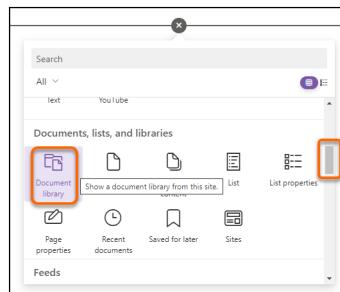


4. Add a new web part.

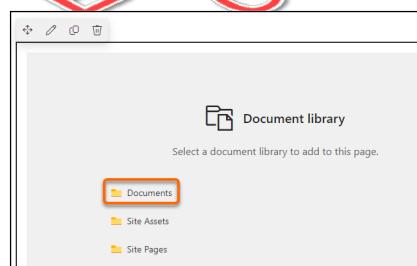
- A. Locate and click the **+** by hovering where you want to add the web part and the **+** will appear if a web part may be added:



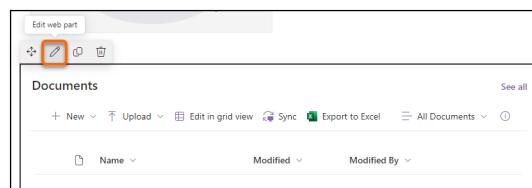
B. Scroll down the web part dialog and select the **Document library** web part:



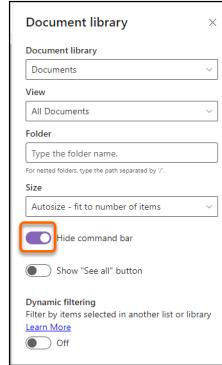
C. From the list of **Document Libraries** select the **Documents** library:



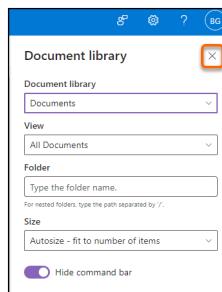
D. Click the pencil icon labeled **Edit web part** to edit the newly added web part:



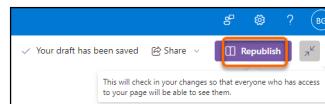
E. In the web part editing panel click the option on to **Hide command bar** and click **Apply**:



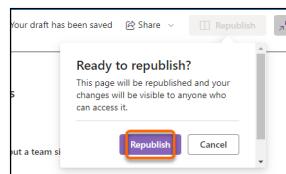
F. Close the **Document Library** web part editor panel:



5. Click the **Republish** button to save the changes and make them visible to anyone with access to the page:



6. Confirm message box and click **Republish**:



Conclusion

In this lesson, you have learned:

1. What site pages are.

2. What wiki pages are.
3. How to add content to the Team Site Home page.
4. How to change the layout of the Team Site Home page.
5. How to create a Site page.

LESSON 8

Site Columns And Content Types

EVALUATION COPY: Not to be used in class.

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, is to create Site Columns and Content Types.

❖ Site Columns

Site columns in SharePoint Online are reusable columns that can be used across multiple lists and libraries within a site collection. They ensure consistency and standardization of metadata across various lists and libraries. By defining a site column once, you can use it in multiple locations without needing to recreate it.

Key Benefits of Site Columns

1. **Consistency** — Ensures uniform data entry across lists and libraries.
2. **Reusability** — Can be reused across multiple lists and libraries.

3. **Centralized Management** — Any updates to the site column are automatically reflected wherever it is used.

❖ Content Types

Content types in SharePoint Online are a way to group columns together into reusable sets. They define the metadata, workflow, and behavior for a category of items or documents. Content types can be used to manage different types of content consistently across a site collection.

Key Benefits of Content Types

1. **Organization** — Helps in categorizing and organizing content effectively.
2. **Consistency** — Ensures consistent metadata and behavior for similar content types.
3. **Flexibility** — Allows for different types of content to be managed within the same list or library.
4. **Workflow Integration** — Can include workflows that apply to specific content types.

Creating and Using Content Types

Content types are created in the Site Settings under **Site Content Types**. Once created, they can be added to lists and libraries. This allows you to apply a standardized set of columns and behaviors to the items or documents within those lists and libraries.

EVALUATION COPY: Not to be used in class.



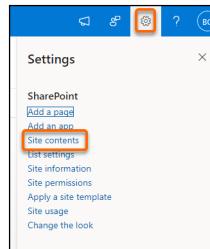
8.1. Site Column Gallery

❖ 8.1.1. Explore the Site Column Gallery

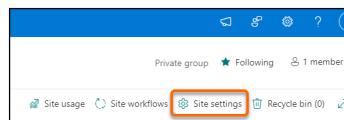
This walk-through will explore the columns available in the Site Column Gallery. Please note that based on your account and security settings, you may not be able to try all of the features you see below.

1. Open a browser window if it is not already open and navigate to your **Demos Team Site** or any site based on the Team Site template.

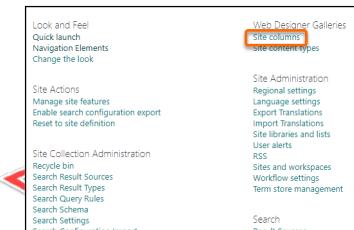
2. Click the **Settings** menu and select the **Site contents** option from the list:



3. Click the **Site Settings** link in the upper right corner of the **Site Contents** page:



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



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**:

Site Settings > Site Columns		
Create Show Group: All Groups		
Site Column	Type	Source
Base Columns		
Append-Only Comments	Multiple lines of text	Demos Team Site
Categories	Single line of text	Demos Team Site
End Date	Date and Time	Demos Team Site
Language	Choice	Demos Team Site
Start Date	Date and Time	Demos Team Site
URL	Hyperlink or Picture	Demos Team Site
Workflow Name	Single line of text	Demos Team Site
Content Feedback		
Number of Likes	Number of Likes	Demos Team Site
Number of Ratings	Number of Ratings	Demos Team Site
Rating (0-5)	Rating (0-5)	Demos Team Site
Core Contact and Calendar Columns		
Address	Multiple lines of text	Demos Team Site
Anniversary	Date and Time	Demos Team Site
Assistant's Name	Single line of text	Demos Team Site
Assistant's Phone	Single line of text	Demos Team Site
Birthday	Date and Time	Demos Team Site
Business Phone	Single line of text	Demos Team Site
Business Phone 2	Single line of text	Demos Team Site

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

EVALUATION COPY: Not to be used in class.



8.2. Creating Site Columns

❖ 8.2.1. Create a Custom Site Column

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

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

Base Columns	Type	Source
Append-Only Comments	Multiple lines of text	Demos Team Site
Categories	Single line of text	Demos Team Site
End Date	Date and Time	Demos Team Site
Language	Choice	Demos Team Site
Start Date	Date and Time	Demos Team Site
URL	Hyperlink or Picture	Demos Team Site
Workflow Name	Single line of text	Demos Team Site
Content Feedback		
Number of Likes	Number of Likes	Demos Team Site
Number of Ratings	Number of Ratings	Demos Team Site
Rating (0-5)	Rating (0-5)	Demos Team Site
Core Contact and Calendar Columns		
Address	Multiple lines of text	Demos Team Site
Anniversary	Date and Time	Demos Team Site
Assistant's Name	Single line of text	Demos Team Site
Assistant's Phone	Single line of text	Demos Team Site
Birthday	Date and Time	Demos Team Site
Business Phone	Single line of text	Demos Team Site
Business Phone 2	Single line of text	Demos Team Site

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:

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, 10, 100)
- Currency (\$, ., ,)
- Date and Time

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**

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:

5. Click the **OK** button at the bottom of the form to save your work.

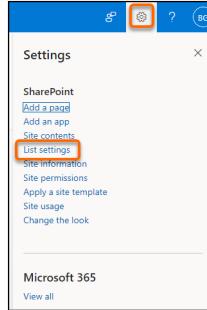
6. If you scroll down the list of **Site Columns**, you will find the new column **Favorite Colors** under the **Custom Columns** group:

Task Status	Choice	Demos Team Site
Total Work	Number	Demos Team Site
Custom Columns		
Favorite Colors	Choice	Demos Team Site
Task Outcome	Outcome choice	Demos Team Site
WSEnabled	Yes/No	Demos Team Site
Display Template Columns		
Compatible Managed Properties	Multiple lines of text	Demos Team Site
Compatible Search Data Types	Choice	Demos Team Site

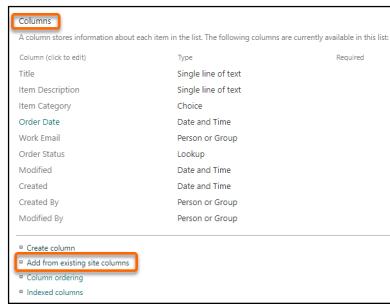
❖ 8.2.2. Add a Site Column to a List

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

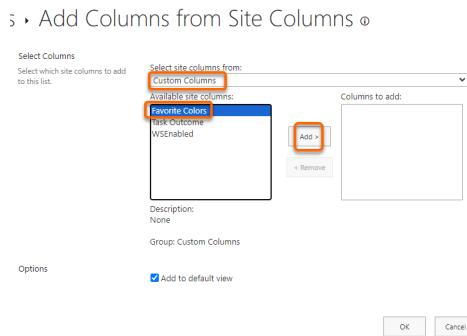
1. Click the **DemoList** link on the **Site Contents** or **Site Quick Launch** menu.
2. Click the **Settings** icon and then click **List settings** from the menu:



3. Scroll down the **List Settings** page and to the **Columns** region.
4. Click the **Add from existing site columns** link under the list of columns:

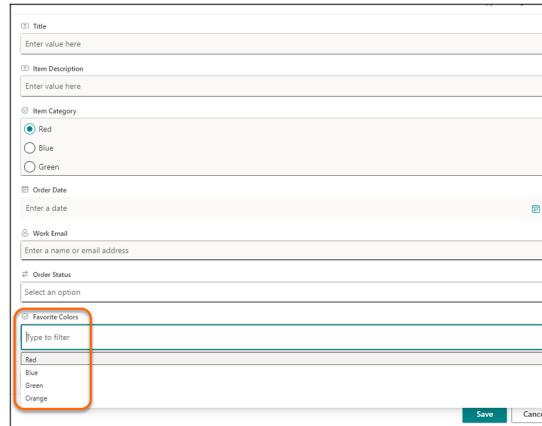


5. In the **Add Columns from Site Columns** page, change the **Select site columns from** drop-down field to **Custom Columns**, and click the **Add** button to move the **Favorite Colors** column to the **Columns to add** list:



6. Click the **OK** button to save our change back to the list's columns.
7. Navigate back to the items view of the **Demo List** by clicking the link in the **Quick Launch** menu or in the **breadcrumbs**.
8. Click the **Add new item** 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:



The screenshot shows a SharePoint 'New Item' form for a 'Demo List'. The 'Item Category' field has 'Red' selected. The 'Favorite Colors' dropdown is open, showing 'Red' as the selected item, with other options like 'Blue', 'Green', and 'Orange' available. The form includes fields for Title, Item Description, Order Date, Work Email, and Order Status.

EVALUATION COPY: Not to be used in class.

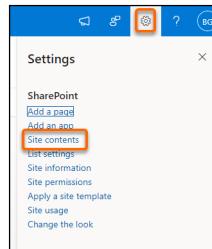
*Evaluation
Copy*

8.3. Site Content Type Gallery

❖ 8.3.1. Explore the Site Content Types Gallery

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

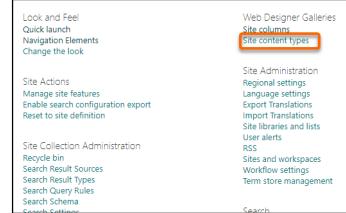
1. Open your browser if it is not already open and navigate to your demo team site.
2. Click the **Settings** menu and select the **Site Contents** option from the list:



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



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



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**:

A screenshot of the Content type gallery. The page title is "Content type gallery" and it says "Create and manage the content types available on this site. Content types visible on this page can be used on this site and its subsites." There is a message about content type publishing. The table lists various content types with their parent and category. The categories include List Content Types, Document Content Types, Group Work Content Types, List Content Types, Contracts, Folder Content Types, Document Content Types, Document Content Types, List Content Types, and List Content Types.

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

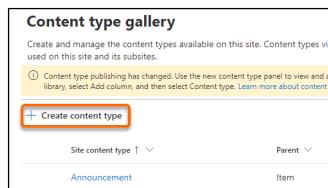
EVALUATION COPY: Not to be used in class.

8.4. Creating Content Types

❖ 8.4.1. How to Create and Use Content Types

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

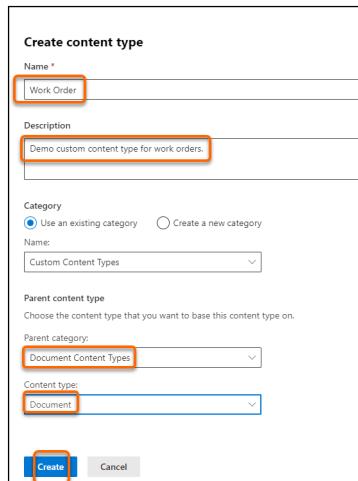
1. Follow the previous demonstration to navigate to the Site content types gallery.
2. Create a new content type in the **DemoTeamSite** that extends the **Document** content type.
 - A. From within the **Site Content Types** gallery page, click the **Create** link at the top left of the page:



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

Field	Data
Name:	Type Work Order
Description:	Type Demo custom content type for work orders
Select parent content type from:	Select Document Content Types
Parent Content Type:	Select Document

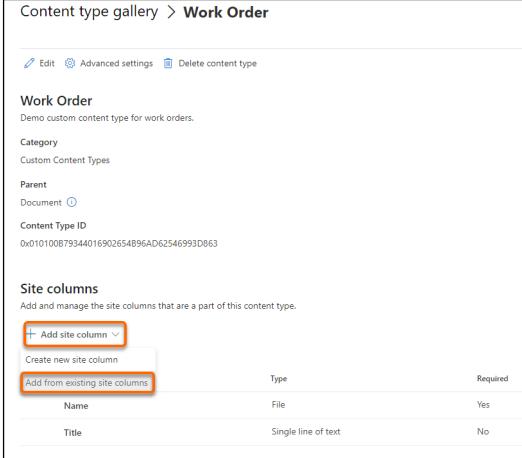
The completed form should look similar to the following image:

A screenshot of the 'Create content type' form. The 'Name' field is filled with 'Work Order'. The 'Description' field is filled with 'Demo custom content type for work orders'. Under 'Category', the radio button 'Use an existing category' is selected, and the dropdown 'Name' is set to 'Custom Content Types'. Under 'Parent content type', the dropdown 'Parent category' is set to 'Document Content Types' and the dropdown 'Content type' is set to 'Document'. At the bottom, the 'Create' button is highlighted with a red box.

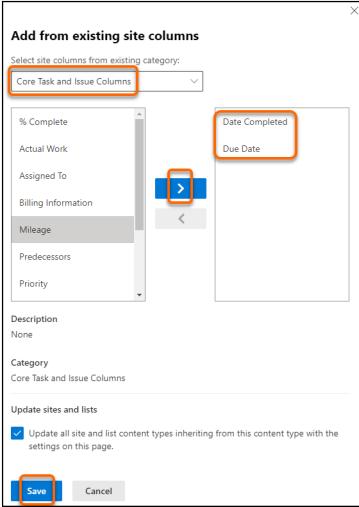
C. Click the **OK** button to complete the new content type creation process.

3. Add columns to the new **Work Order** content type.

A. Click the **Add site column** below the **Site Columns** region. Choose **Add from existing site columns**:



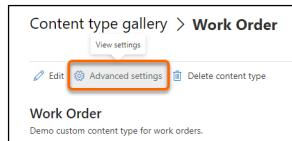
B. In the **Add from existing site columns** panel, select **Core Task and Issue Columns** in the **Select site columns from existing category** drop-down box. From the **Available columns** list box, choose both **Due Date** and **Date Completed**, and then click the **Add** button to add them to the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



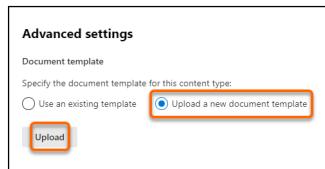
C. Click the **Save** button to complete adding the site columns to the **Work Order** content type.

4. Assign a document template to the new **Work Order** content type.

A. Click the **Advanced settings** link:



B. Click the **Upload a new document template** option on the **Advanced Settings** page and then click the **Upload** 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 **Save** 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.

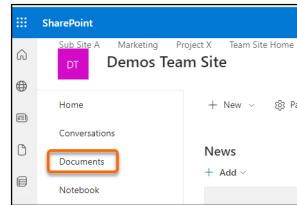
A. Manually navigate back to the **Home** page of the **DemosTeamSite** by editing your browser URL field and removing everything after the **DemosTeamSite**, (or whatever the URL is for your site):



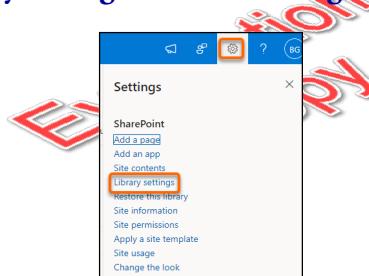
Note

This is necessary because SharePoint removes the site's Quick launch menu when you visit the **Content type gallery**.

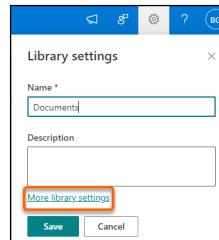
B. Click the **Documents** document library from the **Quick Launch**:



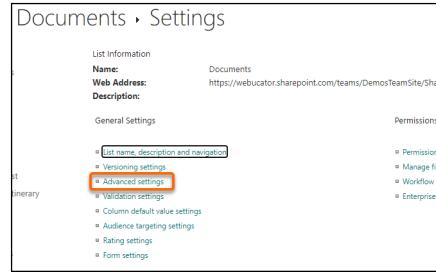
C. Click the **Library settings** from the **Settings** menu:



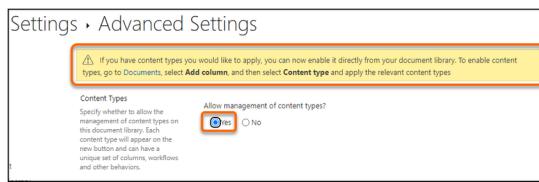
D. Click the **More settings** link from the **Library settings** panel:



E. Click the **Advanced Settings** link on the **Settings** page in the **General Settings** region:



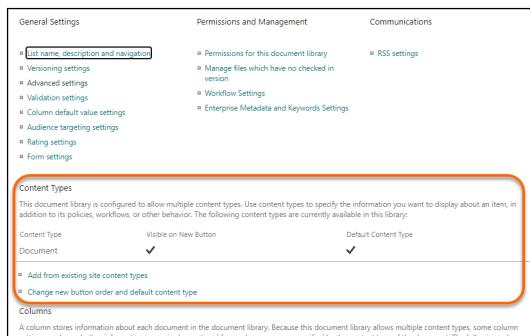
F. Click the **Yes** option under the label **Allow management of content types?** and then click the **OK** button at the bottom of the page to save the change:



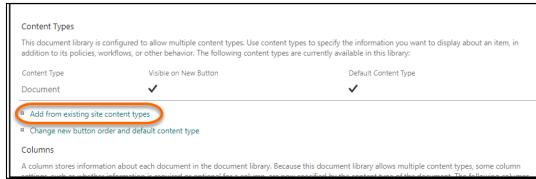
Note

The image shows a message at the top describing an alternative way of applying a custom content type.

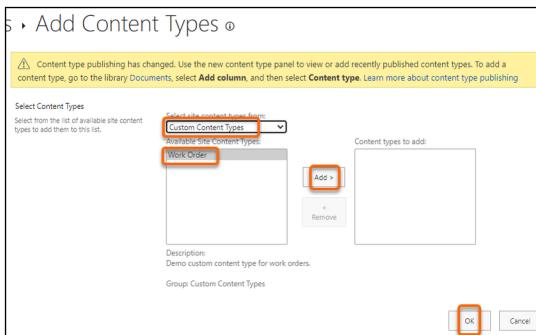
G. You should now see a **Content Types** region that was not being displayed before you made the change in the previous step:



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



I. 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:

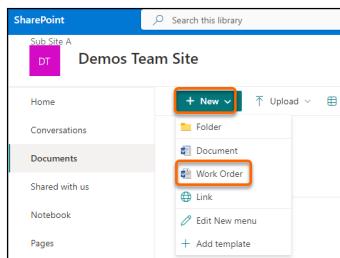


Note

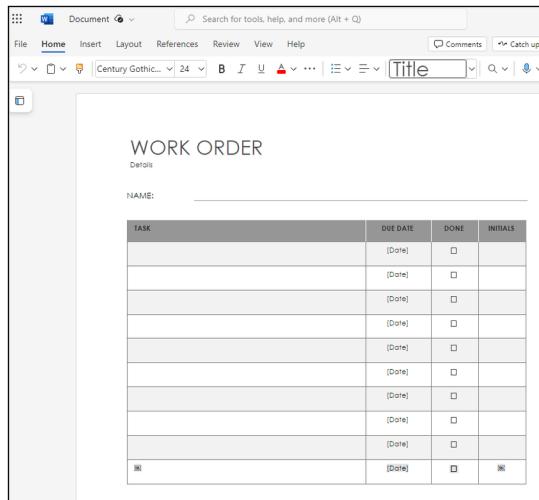
The image shows a message at the top describing an alternative way of applying a custom content type.

6. Add a new document to the **Documents** library based on the **Work Order** content type.

- Click the **Documents** link in either the **Quick Launch** menu or the Site's **Breadcrumbs** to take you to the **Browse** view of the **Documents** library.
- 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.

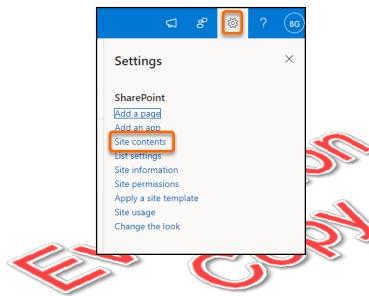
Exercise 10: Creating and Working with Content Types

⌚ 5 to 15 minutes

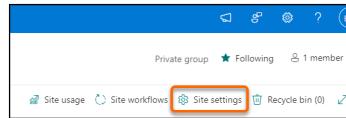
In this exercise, you will learn to create Content Types and Site Columns. Additionally you will learn how to associate a document template with a content type based on the **Document** parent content type.

1. Create a new Content Type for the Sample Class Site.

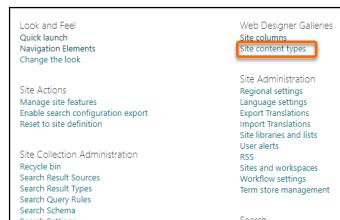
- A. Open your browser if it is not already open and navigate to your root team site.
- B. Click the **Settings** menu and select the **Site Contents** link:



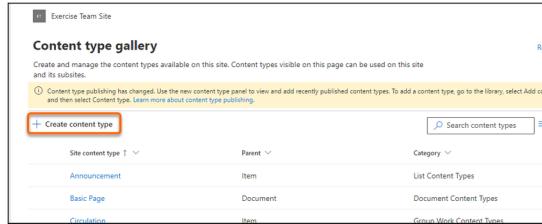
- C. Click **Site Settings**:



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



- 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 content type** link at the top of the list of content types:



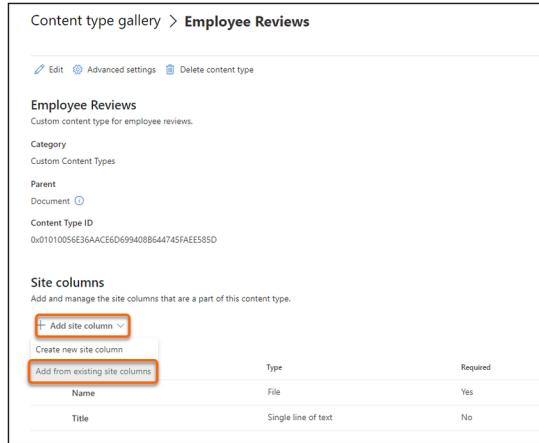
G. In the **New Site Content** form, use the following information to complete the form:

Field	Data
Name:	Type Employee Reviews
Description:	Type Custom content type for employee reviews
Select parent content type from:	Select Document Content Types
Parent Content Type:	Select Document
Choose group:	Type Custom Content Types

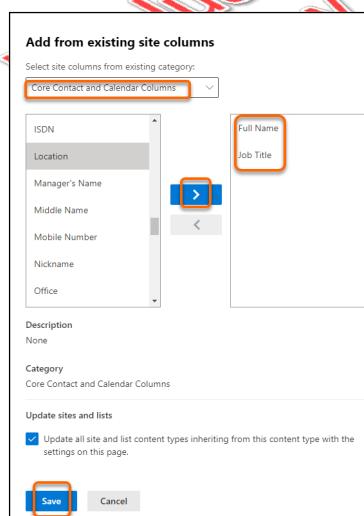
The completed form should look similar to the following image. Click the **OK** button to complete the new content type creation process:

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

A. Click the **Add site column** link and choose **Add from existing site columns** from the drop-down menu:

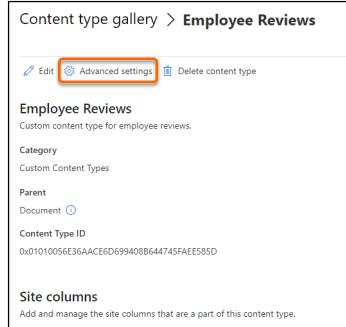


B. In the **Add Columns to Content Type** form, select **Core Contact and Calendar Columns** in the **Select columns from** drop-down box. From the **Available columns** list box, choose both **Full Name** and **Job Title** then click the **Add** button to add them to the **Columns to add** list box.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

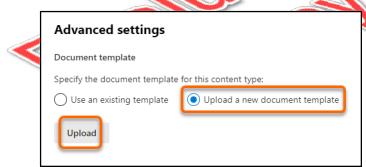


3. Assign a document template to the new **Employee Reviews** content type.

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



B. Click the **Upload a new document template** option on the **Advanced Settings** panel and then click the **Upload** button to find the file:



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

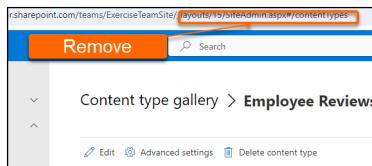
D. Click the **Save** button on the **Advanced Settings** page to save your changes to the **Employee Reviews** content type.

Exercise 11: Adding a Content Type to a Library

⌚ 5 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.

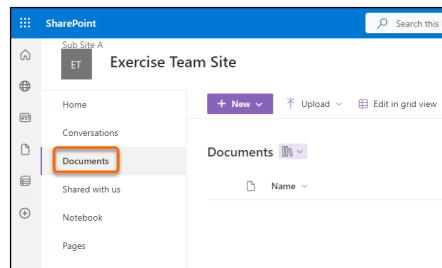
1. Manually navigate back to the **Home** page of the **ExerciseTeamSite** by editing your browser URL field and removing everything after the **ExerciseTeamSite**,(or whatever the URL is for your site):



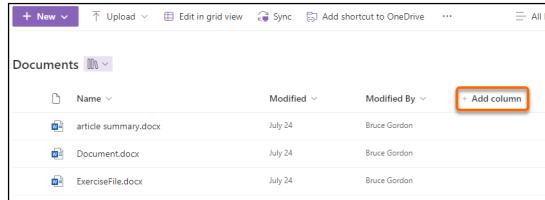
Note

This is necessary because SharePoint removes the site's Quick launch menu when you visit the **Content type gallery**.

2. Click the **Documents** link in the **Quick Launch** menu:

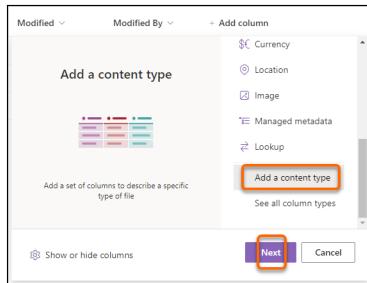


3. Click the **Add column** link at the end of the library's column headers:



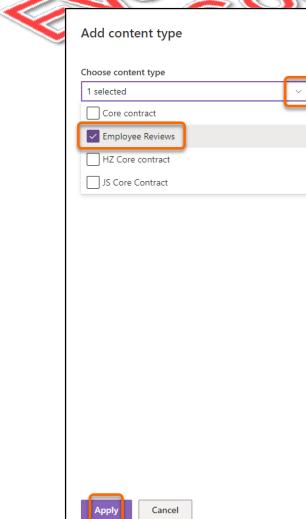
A screenshot of a SharePoint 'Documents' library. The list view shows three items: 'article summary.docx', 'Document.docx', and 'ExerciseFile.docx'. Each item has columns for 'Name', 'Modified', and 'Modified By'. A red box highlights the 'Add column' button in the top right corner of the list header.

4. In the **Add column** drop-down list, scroll to the bottom and choose **Add a content type** and click the **Next** button:



A screenshot of the 'Add a content type' dialog box. It shows a list of column types: Currency, Location, Image, Managed metadata, and Lookup. At the bottom, there is a 'Next' button highlighted with a red box.

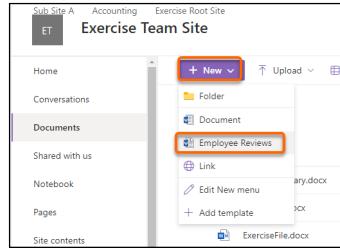
5. In the **Choose content type** drop-down, select **Employee Reviews** and click the **Apply** button:



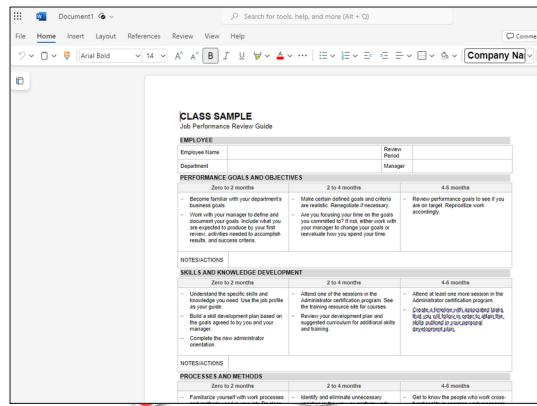
A screenshot of the 'Add content type' dialog box. The 'Choose content type' dropdown shows '1 selected'. Under the list, 'Employee Reviews' is checked and highlighted with a red box. At the bottom, the 'Apply' button is highlighted with a red box.

6. Add a new document to the **Documents** library based on the **Employee Reviews** content type.

A. Click the **New** to open the list and choose the **Employee Reviews** option:



B. **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:



Conclusion

In this lesson, you have learned:

1. About Site Columns.
2. About Content Types.
3. How to create Site Columns.
4. How to create Content Types.
5. How to create a document template for a Content Type.
6. How to assign a Content Type to a list or library.
7. How to create new items based on a custom Content Type.

LESSON 9

Office Integration

EVALUATION COPY: Not to be used in class.

Topics Covered

- Excel Integration.
- Outlook Integration.

Introduction

SharePoint Online is a cloud-based service that helps organizations share and manage content, knowledge, and applications. It enables collaboration, empowers teamwork, and allows for seamless sharing of information within and outside the organization. SharePoint Online is part of the Microsoft 365 suite, offering robust integration with other Microsoft Office applications.

❖ Integration with Microsoft Office

SharePoint Online integrates seamlessly with Microsoft Office applications, enhancing productivity and collaboration. This integration includes:

1. **Office Online** — Users can create, edit, and share Office documents directly within SharePoint using web-based versions of Word, Excel, PowerPoint, and OneNote.
2. **Co-authoring** — Multiple users can work on the same document simultaneously in real-time, improving collaboration and reducing the need for version control.
3. **OneDrive for Business** — Provides personal cloud storage that syncs with SharePoint libraries, enabling access to files from any device.
4. **Outlook Integration** — Users can save emails and attachments directly to SharePoint, linking communication with document management.
5. **Microsoft Teams** — SharePoint sites and document libraries can be added to Teams, creating a centralized hub for teamwork and file sharing.

❖ Benefits of SharePoint and Office Integration

1. **Enhanced Collaboration** — Teams can work together more effectively with shared access to documents and real-time co-authoring.
2. **Improved Productivity** — Streamlined workflows and easy access to files and tools boost overall productivity.
3. **Better Organization** — Integrated tools help keep information organized and easily accessible.
4. **Increased Flexibility** — Users can access and edit documents from anywhere, on any device.
5. **Strengthened Security** — Advanced security features protect sensitive information and ensure compliance with industry standards.

In this lesson, you'll learn how to import data from Excel into SharePoint, creating organized and efficient lists, and how to export this data back into Excel for further analysis. You will also learn how to set up Outlook alerts for SharePoint list changes.

EVALUATION COPY: Not to be used in class.

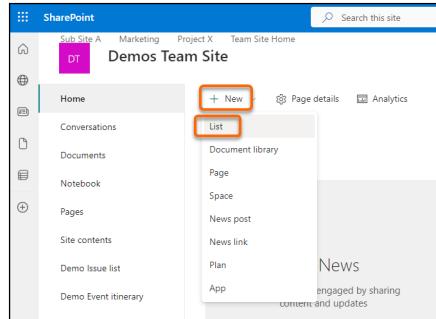
—————*

9.1. Excel Integration

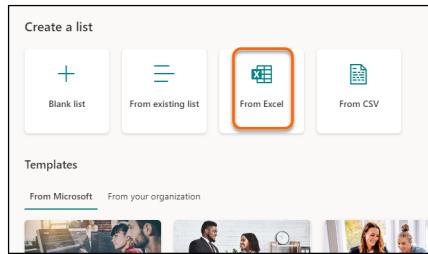
❖ 9.1.1. Import Excel Spreadsheet to List

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

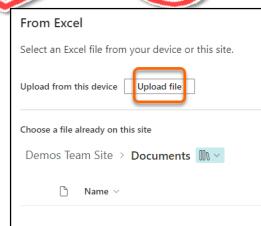
1. Open your browser if it is not already open and navigate to the **Demos Team Site Home** page.
2. Click the **New** menu and then choose the **List** link:



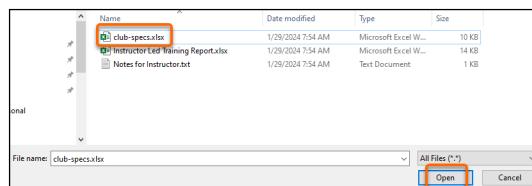
3. Click the **From Excel** template to create the new list:



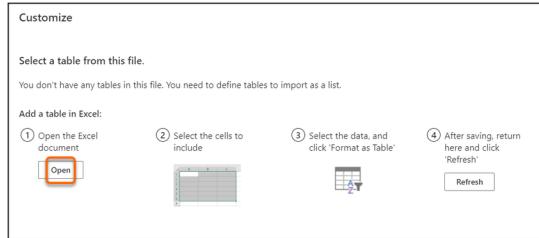
4. Click the **Upload file** button to select the spreadsheet for the import:



5. 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:



6. Click the **Open** button on the **Customize** dialog to open the file in Excel:



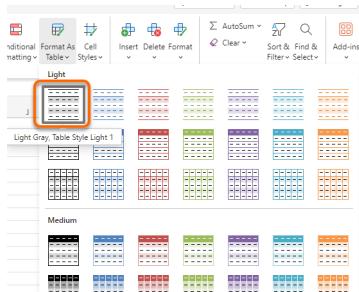
Note

If the Excel file has data already formatted as a table you would be able to choose that at this step. In this example, the data has not yet been formatted into a table.

7. In the Excel tab, click the upper left cell and drag the mouse pointer to the lower right cell selecting all of the club data and click the **Format as Table** button in the toolbar:

Club Name	Loft Degrees	Medium Swing Yards	Fast Swing Yards
1 Wood	15	250	250
2 Wood	15	210	280
3 Hybrid	18	200	220
4 Hybrid	21	175	180
5 Iron	24	160	170
6 Iron	27	155	160
7 Iron	31	145	150
8 Iron	35	130	135
9 Iron	40	125	130
Pitching Wedge	45	115	120
Approach Wedge	50	95	100

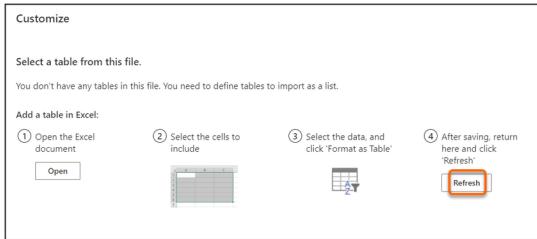
8. In the **Format as Table** drop-down, pick any color scheme you like, the image is showing the first choice as the one selected:



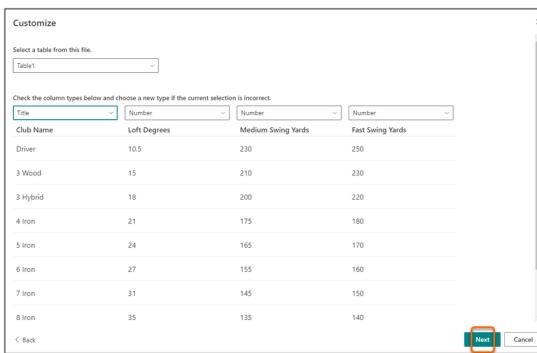
9. In the **Format as Table** dialog, click the **OK** button:



10. Switch back to the browser tab of the Team site with the **Customize** dialog and click the **Refresh** button:



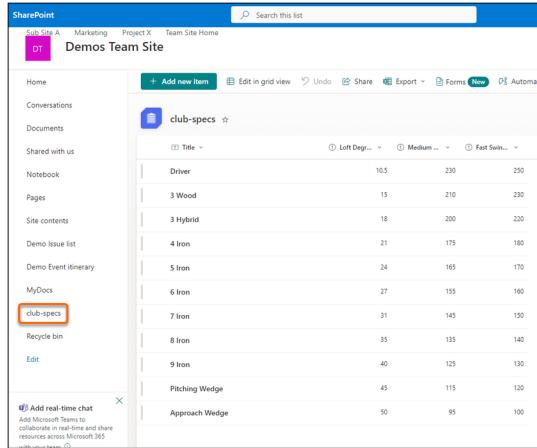
11. Note the options to select the table, if more than one was available, and to set the SharePoint list column type for each column from the Excel file, in this example the defaults are fine, and click the **Next** button:



12. Note the options to name, describe, and add to the site's Quick launch. Leaving everything at the default, click the **Create** button:



13. Verify the data from Excel has been imported into a new SharePoint list, it should look similar to the following:

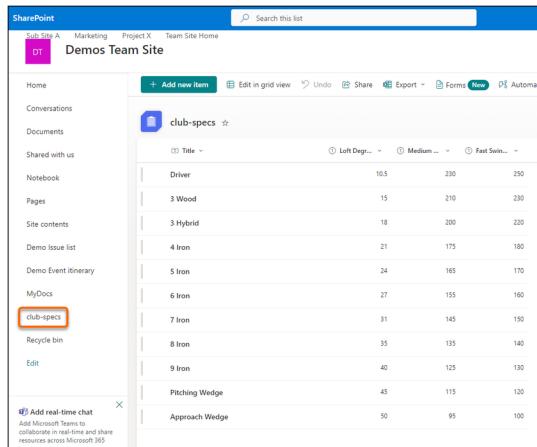


Title	Loft Deg...	Medium	Fast Swing...
Driver	10.5	230	250
3 Wood	15	210	230
3 Hybrid	18	200	220
4 Iron	21	175	180
5 Iron	24	165	170
6 Iron	27	155	160
7 Iron	31	145	150
8 Iron	35	135	140
9 Iron	40	125	130
Pitching Wedge	45	115	120
Approach Wedge	50	95	100

❖ 9.1.2. Export List Data to Excel

This walk-through will show you how to export the list data from the **club-specs** 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 **club-specs** list.

1. Export the **club-specs** list to Microsoft Excel.
 - A. Open your browser if it is not already open and navigate to the **Demos Team Site Home** page.
 - B. Click the **club-specs** link in the **Quick Launch** menu to navigate to the list:



Title	Loft Deg...	Medium	Fast Swing...
Driver	10.5	230	250
3 Wood	15	210	230
3 Hybrid	18	200	220
4 Iron	21	175	180
5 Iron	24	165	170
6 Iron	27	155	160
7 Iron	31	145	150
8 Iron	35	135	140
9 Iron	40	125	130
Pitching Wedge	45	115	120
Approach Wedge	50	95	100

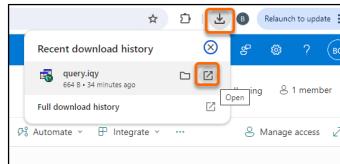
- C. Click the **Export** drop-down then choose **Export to Excel**:

Driver	Score
3 Wood	15
3 Hybrid	18
4 Iron	21
5 Iron	24
6 Iron	27
7 Iron	31
8 Iron	35

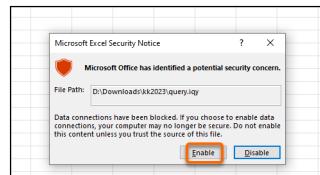
Note

If you are working on a Mac computer, you will not see the **Export to Excel** option. Although you can still export the data using the **Export to CSV** option, this will not give you the data syncing feature that the **Export to Excel** does. If you don't have access to a Windows PC to try this you will have to skip the remaining steps in this walk-through.

D. The previous step should automatically download a file named `query.iqy` file. To open the file from a **Chrome** browser, click the **download** icon and then click the **Open** icon next to the `query.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 **club-specs** list data in a linked spreadsheet. Note that the link is one way. You can only get updates from the SharePoint server, and any changes you make to the spreadsheet data do not sync back to the list in the site:

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

2. Update the **club-specs** list data and sync the updates to the linked Excel spreadsheet.
 - A. Go back to your browser window with the **club-specs** 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 close the dialog to save your change:

Driver

① Title
Driver

② Loft Degrees
10.5

③ Medium Swing Yards
230

④ Fast Swing Yards
350

⑤ Attachments
Add or remove attachments

- D. Verify the changes have been recorded in the list:

...
...
Driver	...	10.5	230	350
3 Wood		15	210	230
3 Hybrid		18	200	220
4 Iron		21	175	180
5 Iron		24	165	170

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

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

G. Verify the Excel spreadsheet reflects the changes made to the list:

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

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

EVALUATION COPY: Not to be used in class.



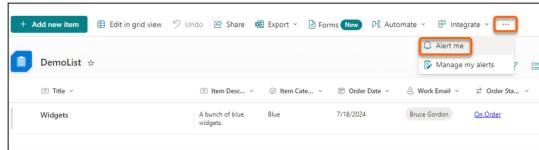
9.2. Outlook Integration

❖ 9.2.1. Create an Alert

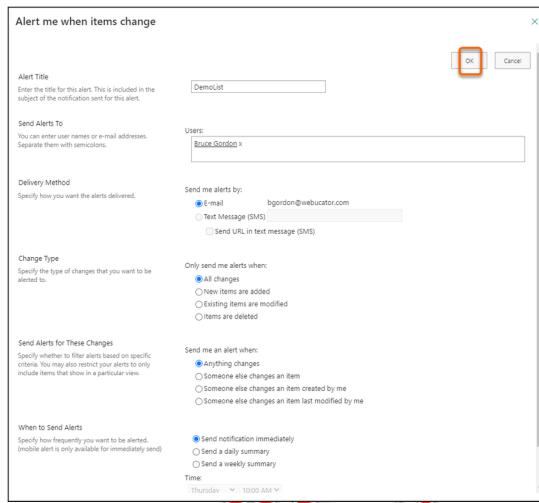
This walk-through will show you how to create an alert in the **DemoList** list to notify you when the list is changed. The demonstration requires that you have done the earlier demonstration that created the **DemoList** list. Please use any list you wish if you did not create a Demo List.

1. Create an alert for the **DemoList** list.
 - A. Open your browser if it is not already open and navigate to the **Exercise Team Site Home** page.
 - B. Click the **DemoList** 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 **3-ellipse** drop-down:

EVALUATION COPY: Not to be used in class.

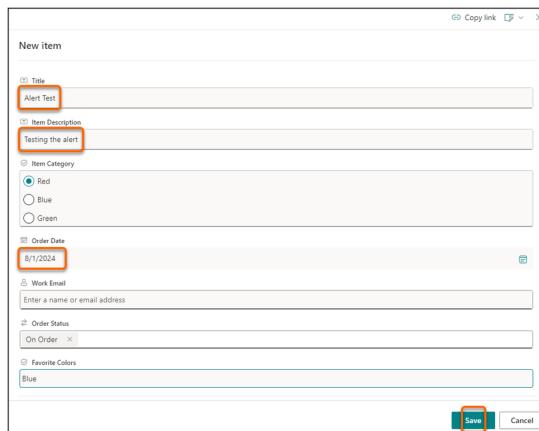


D. Leave all the default options in the **Alert me when items change** dialog form and click the **OK** button to save the new alert:



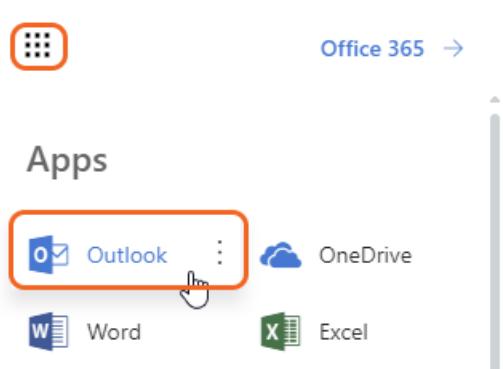
2. Add a new **DemoList** item to the list to test the new alert.

A. Click the **Add new item** link at the top of the list. Enter some sample data and click the **Save** button:

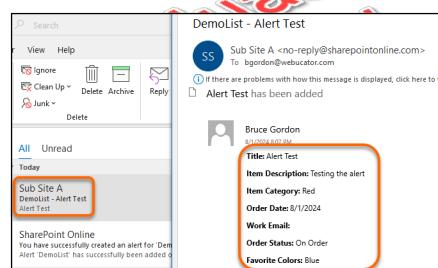


3. Check for an alert in Microsoft Outlook Online.

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**:



Note

It is possible that the email will be in your **Junk Email** folder. If you do not see the email in your **Inbox** check there.

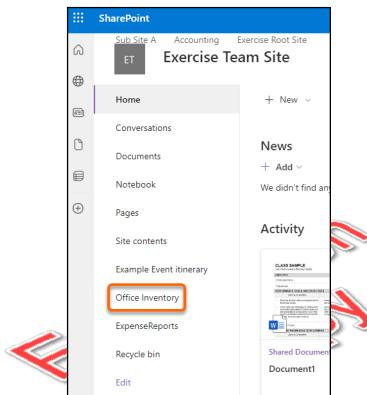


Exercise 12: Excel Integration

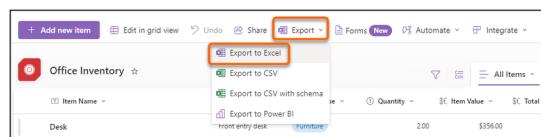
⌚ 5 to 15 minutes

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

1. Export the **Office Inventory** list to Microsoft Excel.
 - A. Open your browser if it is not already open and navigate to the **Exercise Team Site Home** page.
 - B. Click the **Office Inventory** link in the **Quick Launch** menu to navigate to the list:



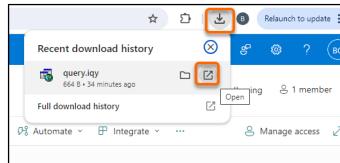
- C. Click the **Export** drop-down then choose **Export to Excel**:



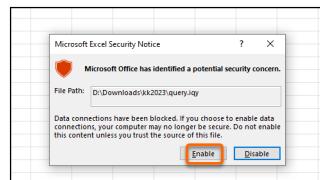
Note

If you are working on a Mac computer, you will not see the **Export to Excel** option. Although you can still export the data using the **Export to CSV** option, this will not give you the data syncing feature that the **Export to Excel** does. If you don't have access to a Windows PC to try this you will have to skip the remaining steps in this exercise.

D. The previous step should automatically download a file named `query.iqy` file. To open the file from a Chrome browser, click the **download** icon and then click the **Open** icon next to the `query.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 **Office Inventory** 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:

Item Name	Item Description	Item Type	Quantity	Item Value	Total Value	Item Type2	Path
Desk	Front entry desk	Furniture	2.00	\$ 356.00	\$ 712.00	Item	teams/ExerciseTeamSite/Lists/Office Inventory
Chair	Front entry chairs	Furniture	1.00	\$ 120.00	\$ 120.00	Item	teams/ExerciseTeamSite/Lists/Office Inventory
Laptop	Sales person laptops	Equipment	25.00	\$ 750.00	\$ 18,750.00	Item	teams/ExerciseTeamSite/Lists/Office Inventory
Desk top computer	Front desk check in	Equipment	1.00	\$ 1,250.00	\$ 1,250.00	Item	teams/ExerciseTeamSite/Lists/Office Inventory
Office 365	Software license	Software	26.00	\$ 95.00	\$ 2,470.00	Item	teams/ExerciseTeamSite/Lists/Office Inventory

2. Update the **Office Inventory** list data and sync the updates to the linked Excel spreadsheet.

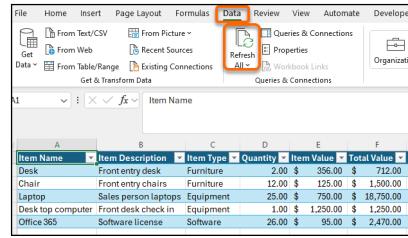
A. Go back to your browser window with the **Office Inventory** list **All Items** view showing.

B. Click an item such as the **Desk** link to open the item's details form:

C. Change the **Qty** field of the **Desk** to 3 and click the **X** button to close and save your change:



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. Verify the Excel spreadsheet reflects the changes made to the list:

Item Name	Item Description	Item Type	Quantity	Item Value	Total Value
Desk	Front entry desk	Furniture	2.00	\$ 356.00	\$ 712.00
Chair	Front entry chairs	Furniture	12.00	\$ 125.00	\$ 1,500.00
Laptop	Sales person laptops	Equipment	25.00	\$ 750.00	\$ 18,750.00
Desk top computer	Front desk check in	Equipment	1.00	\$ 1,250.00	\$ 1,250.00
Office 365	Software license	Software	26.00	\$ 95.00	\$ 2,470.00

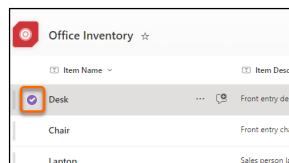
G. Close Microsoft Excel and click **Don't Save** when asked if you want to save the changes to 'Book1'.

Exercise 13: Outlook Integration

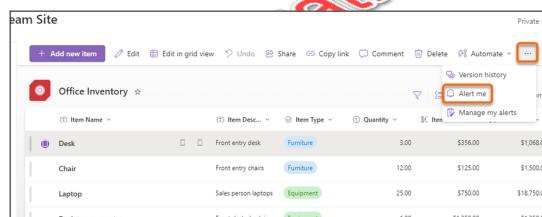
⌚ 5 to 15 minutes

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

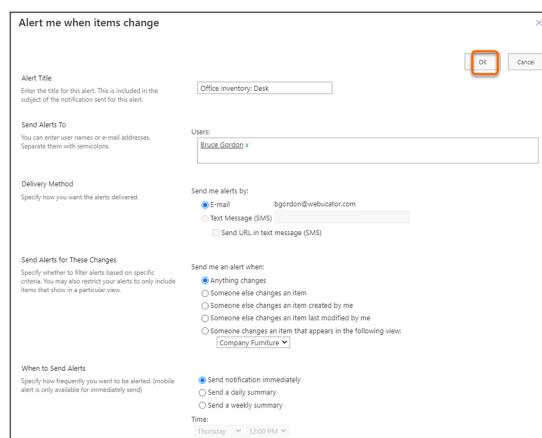
1. Create an alert for the **Office Inventory** list item changes.
 - A. Open your browser if it is not already open and navigate to your root team site.
 - B. Click the **Office Inventory** link in the **Quick Launch** menu to navigate to the list. You may also open this list from **Site Contents**.
 - C. Click and **check** field next to the **Desk** item to select it:



- D. Click the **Alert Me** in the 3-ellipse drop-down:



- E. Leave all the default options in the **Alert me when items change** dialog form and click the **OK** button to save the new alert:



Note

Selecting a single item or multiple items will limit the alerts to just those items being modified.

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



New item

Item Name: Printer

Item Description: Laser printer

Item Type: Equipment

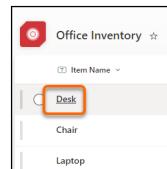
Quantity: 1

Item Value: 500

Attachments: Add attachments

Save Cancel

3. Modify the **Desk** item in **Office Inventory**.
 - A. Click the **Desk** item in the **Office Inventory** list to edit it:

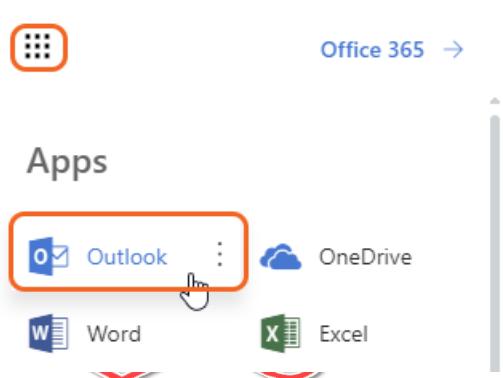


- B. Change the **Item Value** field of the **Desk** to 425 and click the **X** button to close and save your change:



4. 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**:



Note

You should only get an alert for the updated **Desk** and not the new item if you selected only the **Desk** when you created the alert. It is possible that the email will be in your **Junk Email** folder. If you do not see the email in your **Inbox** check there.

Conclusion

In this lesson, you have learned how to import data from Excel to SharePoint and export it back for analysis and to set up Outlook alerts for SharePoint list changes.

LESSON 10

Managing SharePoint Site Permissions

EVALUATION COPY: Not to be used in class.

Topics Covered

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

Introduction

SharePoint Online permissions determine the access and control users have over content within SharePoint sites and libraries. These permissions are structured to provide a secure and efficient way to manage user access.

❖ Permission Levels

SharePoint Online includes several predefined permission levels:

1. **Full Control** — Users can manage site settings, permissions, and content.
2. **Edit** — Users can add, edit, and delete lists, libraries, and list items.
3. **Contribute** — Users can add and edit items in existing lists and libraries.
4. **Read** — Users can view pages and list items, but cannot make changes.

❖ Groups

Permissions are often assigned to groups rather than individual users to simplify management. Common SharePoint groups include:

1. **Owners** — Have Full Control permissions.

2. **Members** — Typically have Edit permissions.
3. **Visitors** — Typically have Read permissions.

❖ Inheritance

SharePoint Online uses permission inheritance to streamline access management:

1. **Inherited Permissions** — Subsites, lists, and libraries inherit permissions from their parent site by default.
2. **Unique Permissions** — Inheritance can be broken to provide unique permissions for specific subsites, lists, or libraries.

❖ Best Practices

When managing permissions in SharePoint Online, consider the following best practices:

1. Use groups to assign permissions instead of individual users.
2. Maintain the principle of least privilege, granting the minimum level of access necessary.
3. Regularly review and update permissions to ensure they remain appropriate.

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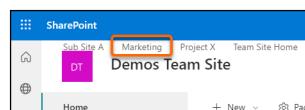
—————*

10.1. SharePoint Groups

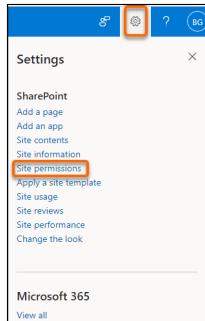
❖ 10.1.1. View the Default SharePoint Groups

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

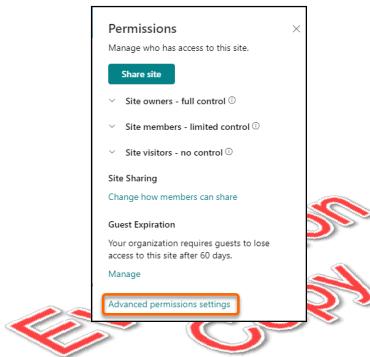
1. Make sure your browser is open to the **Marketing** site:



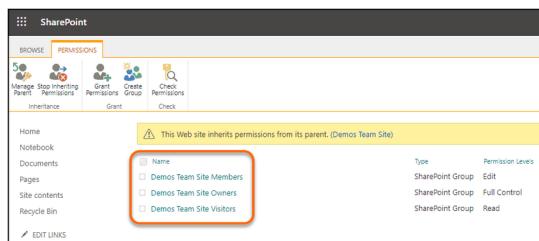
2. Click the **Settings** menu link and then select the **Site permissions** link from the available options:



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 **Demos Team Site** appended to them:



5. Click the **Demo Team Site Members** link to view the list of members (it is currently empty):



6. Click the **Demo Team Site Visitors** link in the **Quick Launch** menu to view its members and verify that it is currently empty:

7. Create a new SharePoint group.

A. Click the **More...**link in the **Quick launch** menu:

B. Click the **New Group** link from the **New** drop-down link:

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

D. 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.

E. 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.

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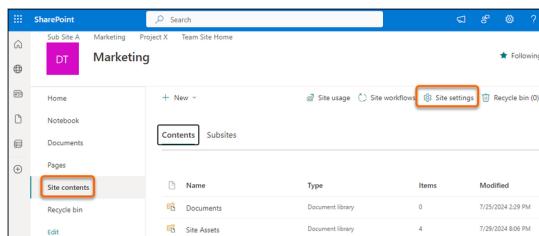
10.2. Assigning Permissions

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

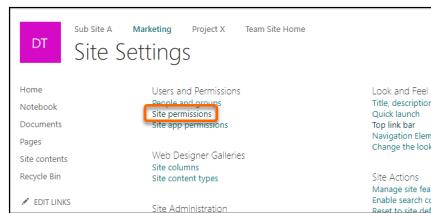
❖ 10.2.1. Add a User Account to a SharePoint Group

This walk-through will use the recommended method of adding a 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:



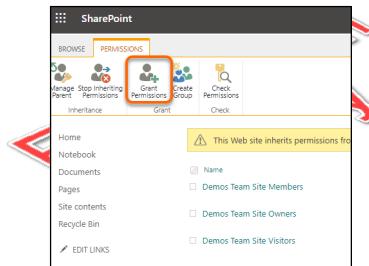
3. Click the **Site permissions** link on the **Site Settings** page:



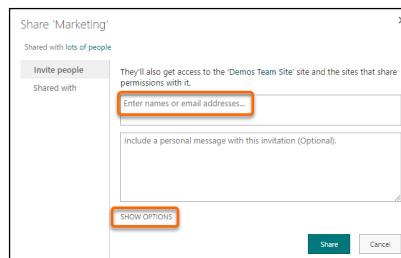
Note

This shows another way to get to the same **PERMISSIONS** view from the previous walk-through.

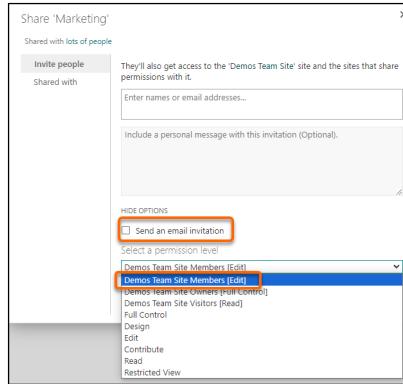
4. Click the **Grant Permission** link button from the **PERMISSIONS** tab toolbar:



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:



EVALUATION COPY: Not to be used in class.

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10.3. Permissions Inheritance

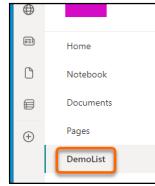
Permissions are initially assigned to the root site of the Site Collection when it is created. Child sites have the option when they are created to use unique permissions or inherit the permissions of the parent site. The default setting is to inherit permissions, but you can always break the inheritance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

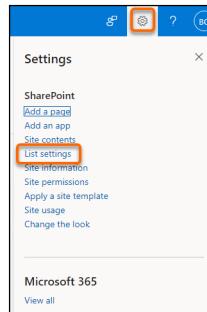
❖ 10.3.1. Modifying Permissions Inheritance

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

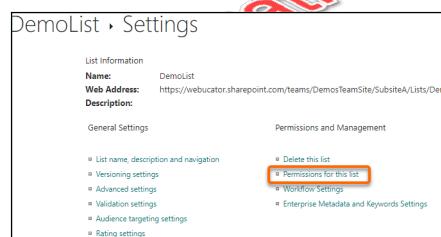
1. Make sure your browser is open on your Class Sample site.
2. Modify the permissions of the **Demo List**.
 - A. Click the **DemoList** link in the **Quick Launch** menu or in the **Site Contents**:



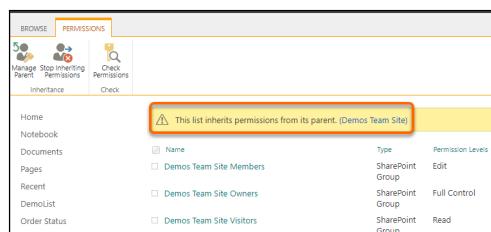
B. Click the **Settings** and choose **List Settings**:



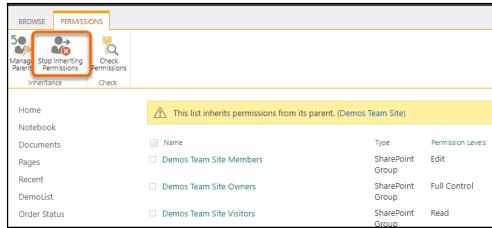
C. Click the **Permissions for this list**:



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



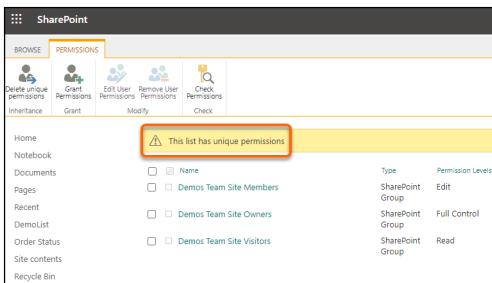
E. Click the **Stop Inheriting Permissions** link button to turn off the inheritance for the **DemoList** list:



F. Click the **OK** button on the confirmation dialog window notifying you that permission from the parent will no longer affect this list:

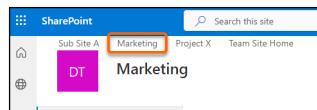


G. Note that now the **List Permissions** page banner is notifying you that **This list has unique permissions** and the **PERMISSIONS** toolbar has more options:



3. Modify the permission of the **Marketing** child site.

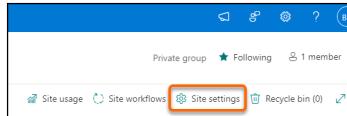
A. Click the **BROWSE** tab to close the **PERMISSIONS** toolbar then click the **Marketing** link in the **Top Link Bar**:



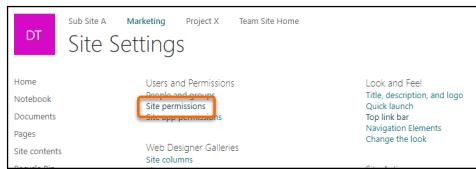
Note

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

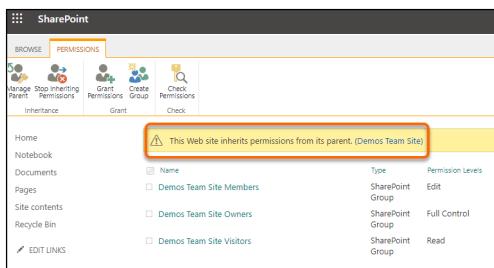
B. Click the **Settings** menu link and then select the **Site Contents** link from the available options. Click **Site Settings**:



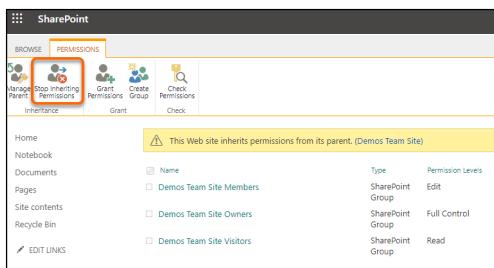
C. Click the **Site permissions** link on the **Site Settings** page:



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:



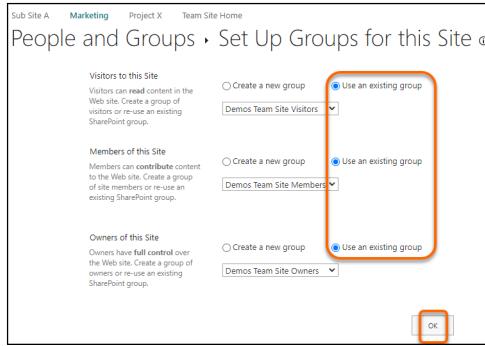
E. Click the **Stop Inheriting Permissions** link button to turn off the inheritance for the **Marketing** child site:



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

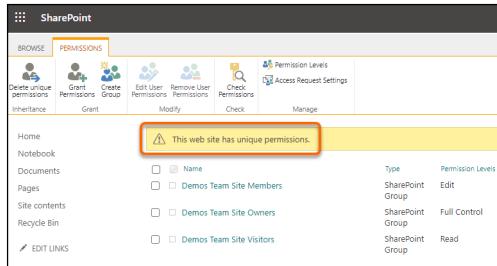


G. When the inheritance is broken, you are given the option of **Use an existing group** or **Create a new group**. For this walk-through, leave it set to the default and click the **OK** button:



H. Follow the earlier steps to navigate back to the **Site permissions** page for **Marketing**.

I. Note that now the **Site Permissions** page banner is notifying you that **This website has unique permissions**:

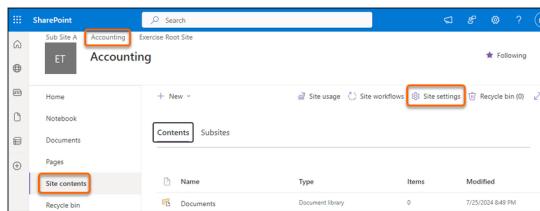


Exercise 14: Working with SharePoint Permissions

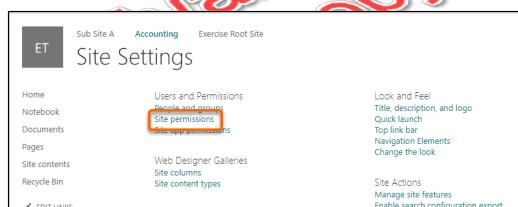
⌚ 5 to 15 minutes

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

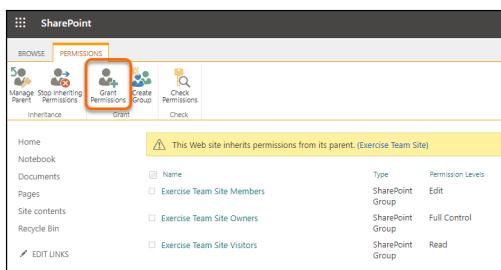
1. Make sure your browser is open to the **Accounting** site.
2. Click the **Settings** link and then select the **Site Contents** link and then click **Site Settings**:



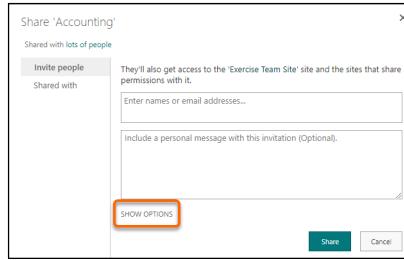
3. Click the **Site permissions** link on the **Site Settings** page:



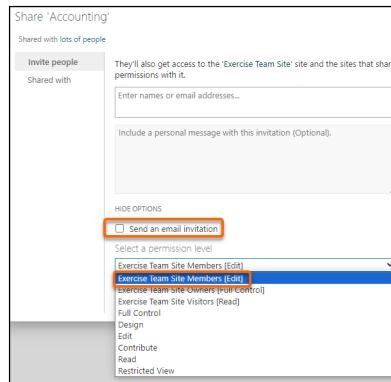
4. Click the **Grant Permission** link button from the **PERMISSIONS** tab toolbar:



5. Enter 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:

1. About SharePoint groups.
2. How to create SharePoint groups.
3. How to assign permission in SharePoint.
4. How to manage permission inheritance at the site level.
5. How to manage permission inheritance at the list or library level.