

Introduction to SharePoint for Office 365 Training



with examples and
hands-on exercises

WEBUCATOR

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Class Files

Download the class files used in this manual at

<https://static.webucator.com/media/public/materials/classfiles/SPO2016.5-1.1.1.zip>.

Errata

Corrections to errors in the manual can be found at

<https://www.webucator.com/books/errata/>.

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LESSON 1

SharePoint 365 Setup

Topics Covered

- Setting up the sample site for class.

Introduction

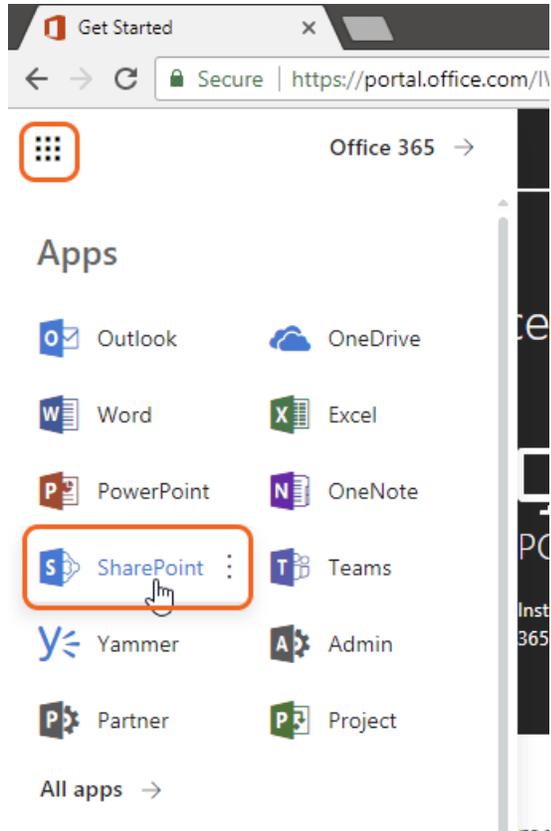
You will need a subscription to create a site. Below are the steps to get started.

Evaluation
Copy

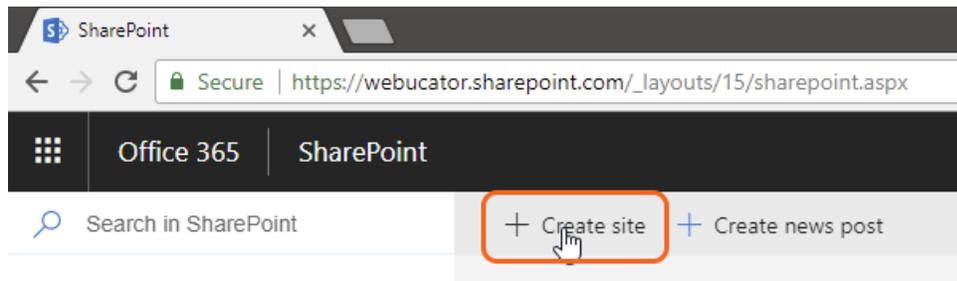


1.1. SharePoint Online

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



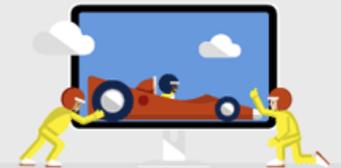
D. Click **Create Site**.



E. Click **Team Site**.

Create a site

Choose the type of site you'd like to create

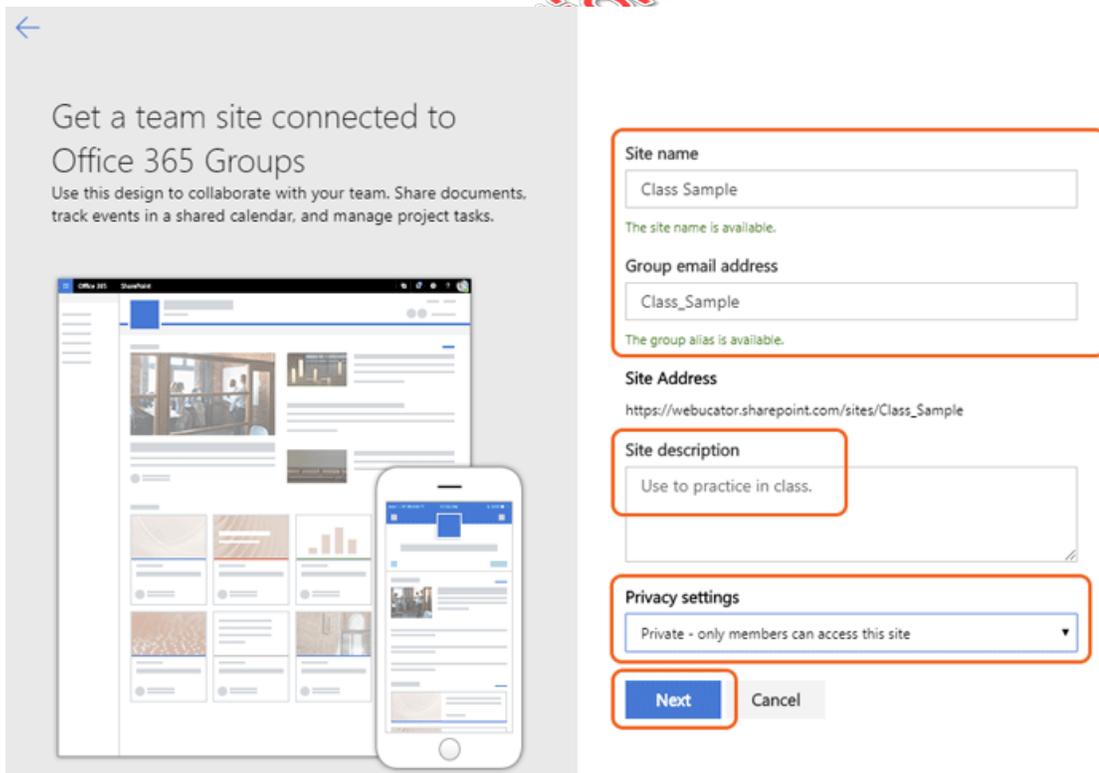


Team site
Share documents, have conversations with your team, keep track of events, manage tasks, and more with a site connected to an Office 365 group.



Communication site
Publish dynamic, beautiful content to people in your organization to keep them informed and engaged on topics, events, or projects.

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



Get a team site connected to Office 365 Groups
Use this design to collaborate with your team. Share documents, track events in a shared calendar, and manage project tasks.

Site name
Class Sample
The site name is available.

Group email address
Class_Sample
The group alias is available.

Site Address
https://webucator.sharepoint.com/sites/Class_Sample

Site description
Use to practice in class.

Privacy settings
Private - only members can access this site

Next Cancel

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

Add group members

Group members will receive an email welcoming them to the new site and Office 365 group



CS

Class Sample
Private group

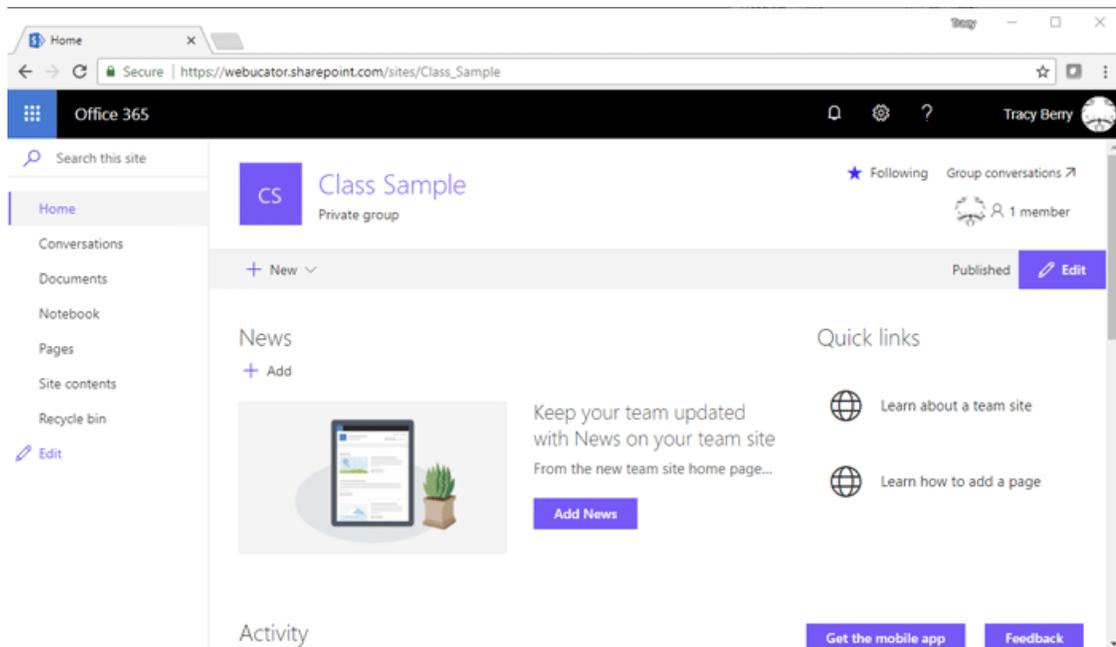
Who do you want to add?
You can also add more people later

Add additional members

Add members

Finish

H. The site is now ready for class.



The screenshot shows a web browser window displaying the SharePoint 365 interface for a site named "Class Sample". The browser address bar shows the URL "https://webucator.sharepoint.com/sites/Class_Sample". The Office 365 header is visible at the top, including the user name "Tracy Berry". The left navigation pane includes options like "Home", "Conversations", "Documents", "Notebook", "Pages", "Site contents", and "Recycle bin". The main content area shows the "Class Sample" site header, a "New" button, and a "News" section with an "Add News" button. There are also "Quick links" for learning about a team site and how to add a page, along with buttons for "Get the mobile app" and "Feedback".

Security Issues

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

Conclusion

In this lesson, you have learned:

- How to set up the sample site for class.

Evaluation
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LESSON 2

SharePoint 365 Introduction

Topics Covered

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

Introduction

SharePoint 365 is a collaboration tool at its heart. Its primary goal is to make it easy for users to find and share information, and there are many features built into SharePoint to facilitate this. SharePoint's library system feature can provide a superior alternative to the traditional file server. SharePoint lists can be an easy-to-design and easy-to-use alternative to sharing spreadsheet files or more formal database tables. Both lists and libraries can be customized and extended to provide enhanced appearances and functionality. All of this collaboration can be done through a browser interface.



2.1. SharePoint Online

This course will focus on SharePoint Online.

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

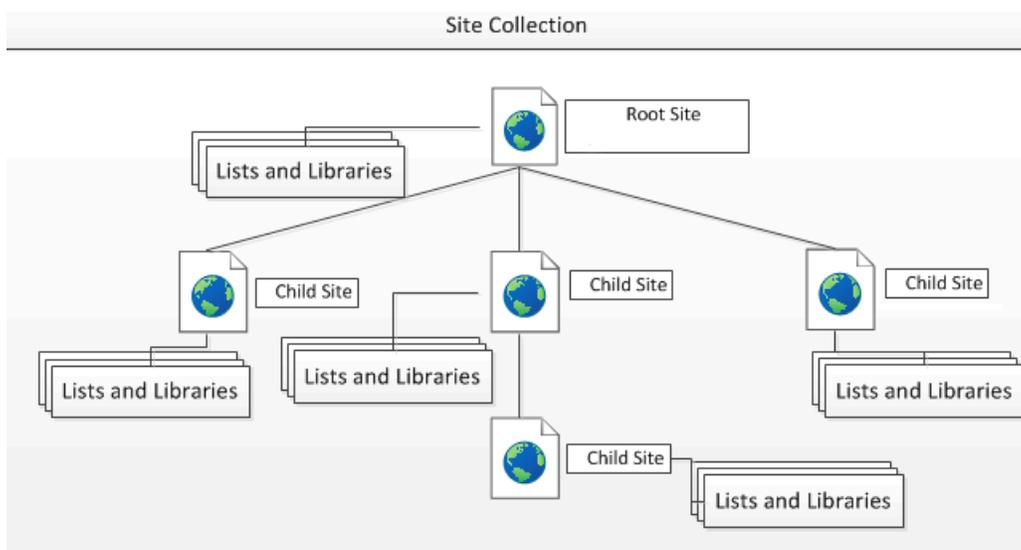


2.2. Site Layout and Navigation

❖ 2.2.1. Layout

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

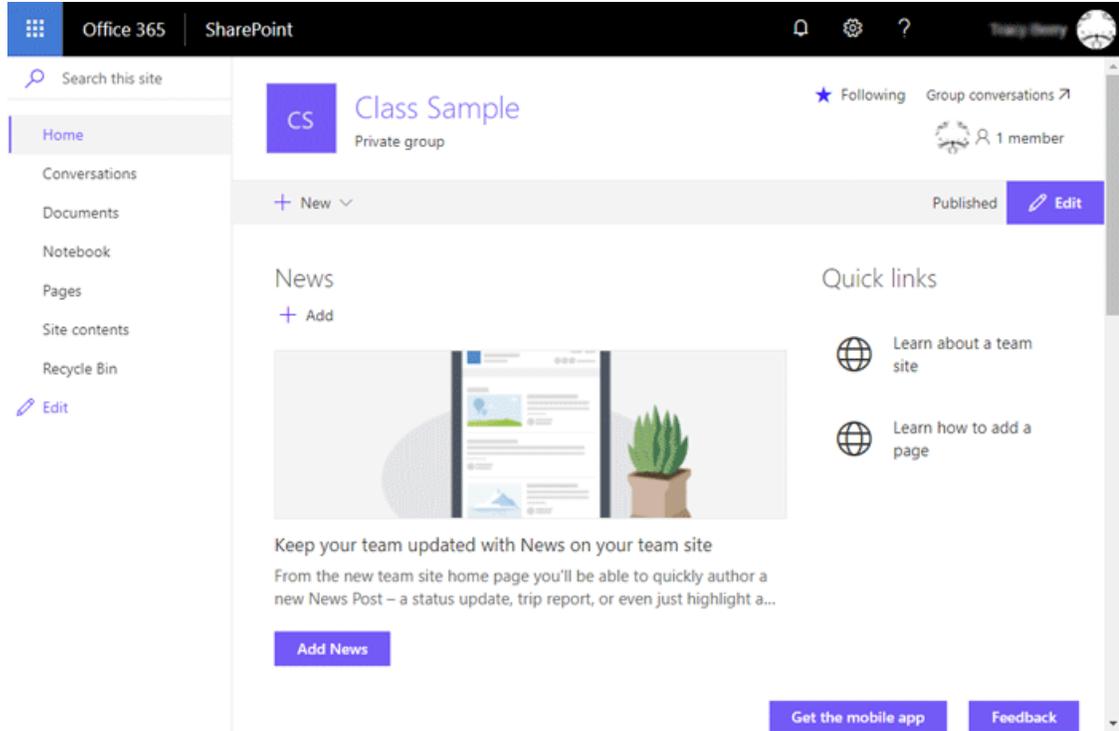
The following diagram illustrates a conceptual view of how sites might be organized in a Site Collection. Note that the presentations in this course use a root site named **Contoso Home Site** with a single child site named **Sub Site A**.



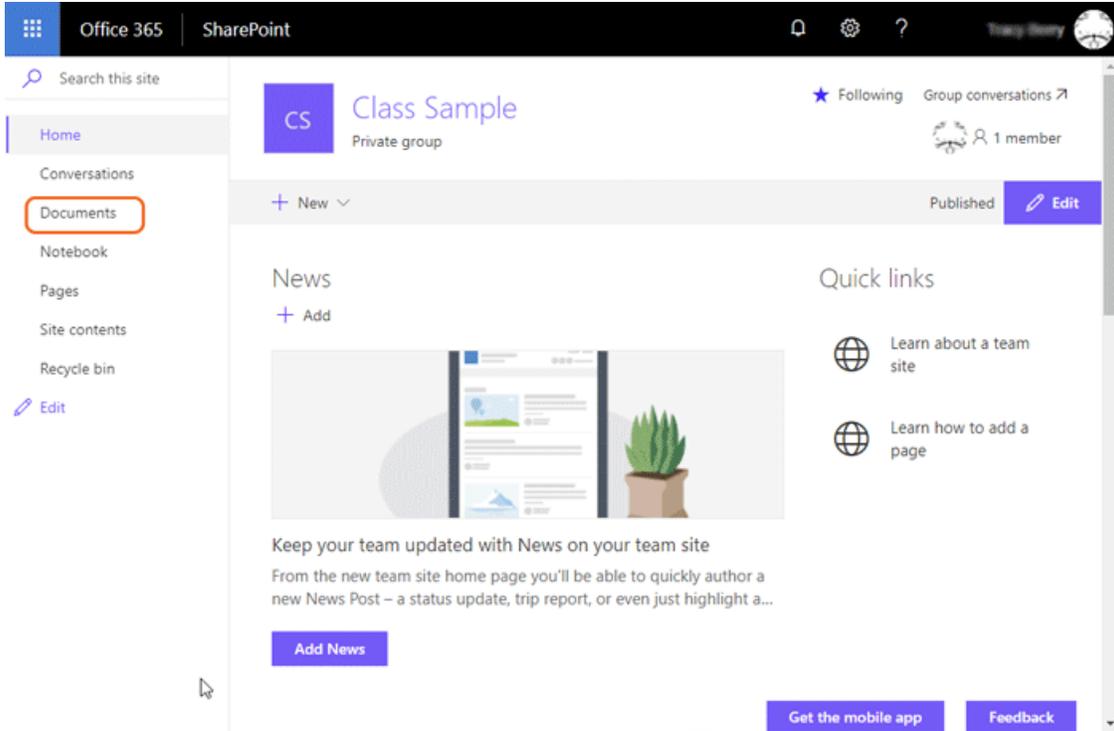
❖ 2.2.2. Navigation

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

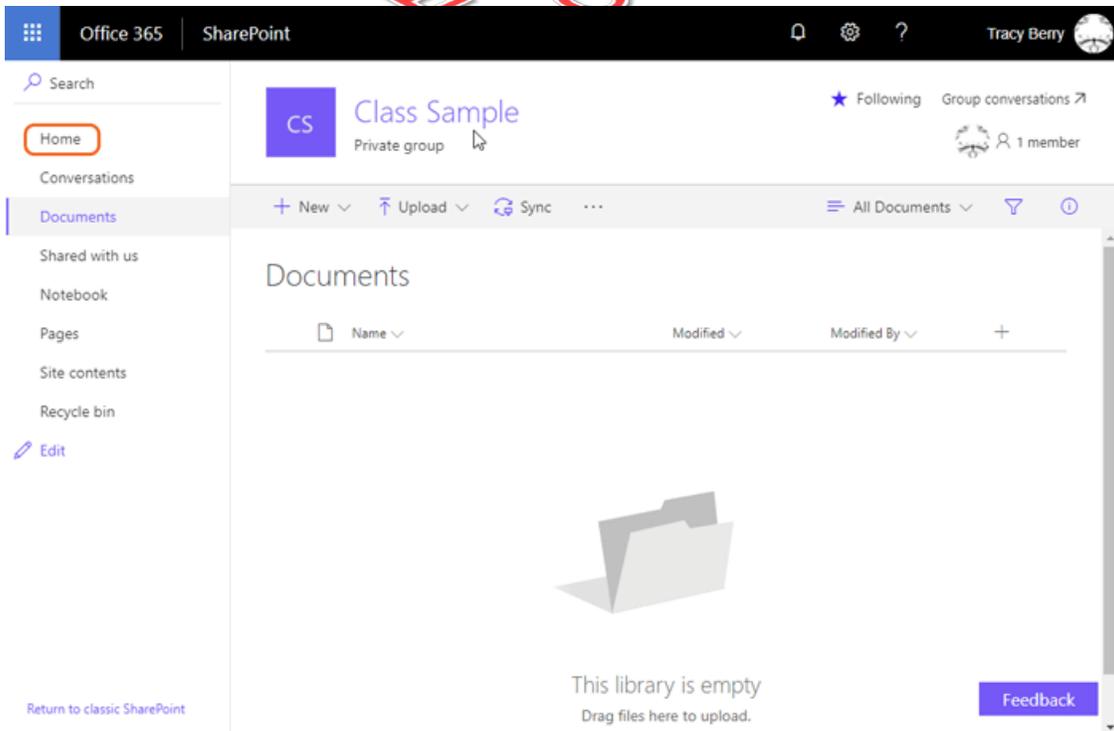
1. Navigate to your Office 365.
 - A. Launch your browser.
 - B. Log in to your Office 365.
 - C. The home page of your team site should look similar to the following:



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



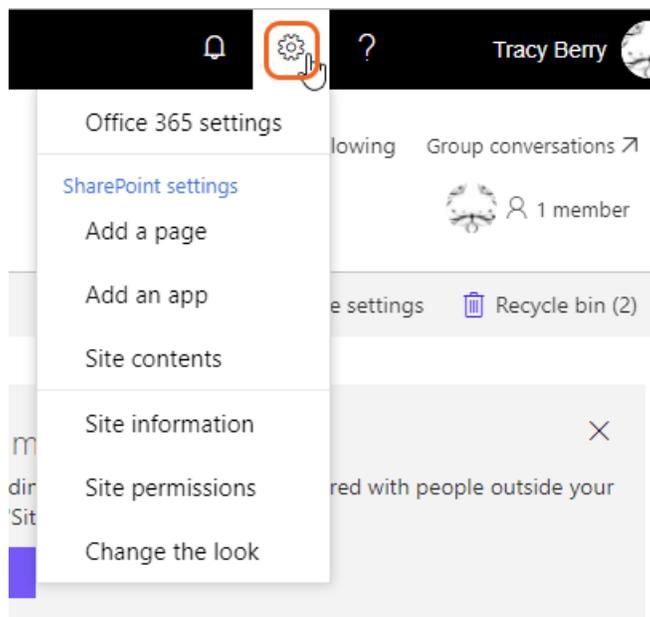
- B. Navigate back to the home page of the site by clicking the **Home** link within the **Quick Launch** menu.



Creating Lists and Libraries

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

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



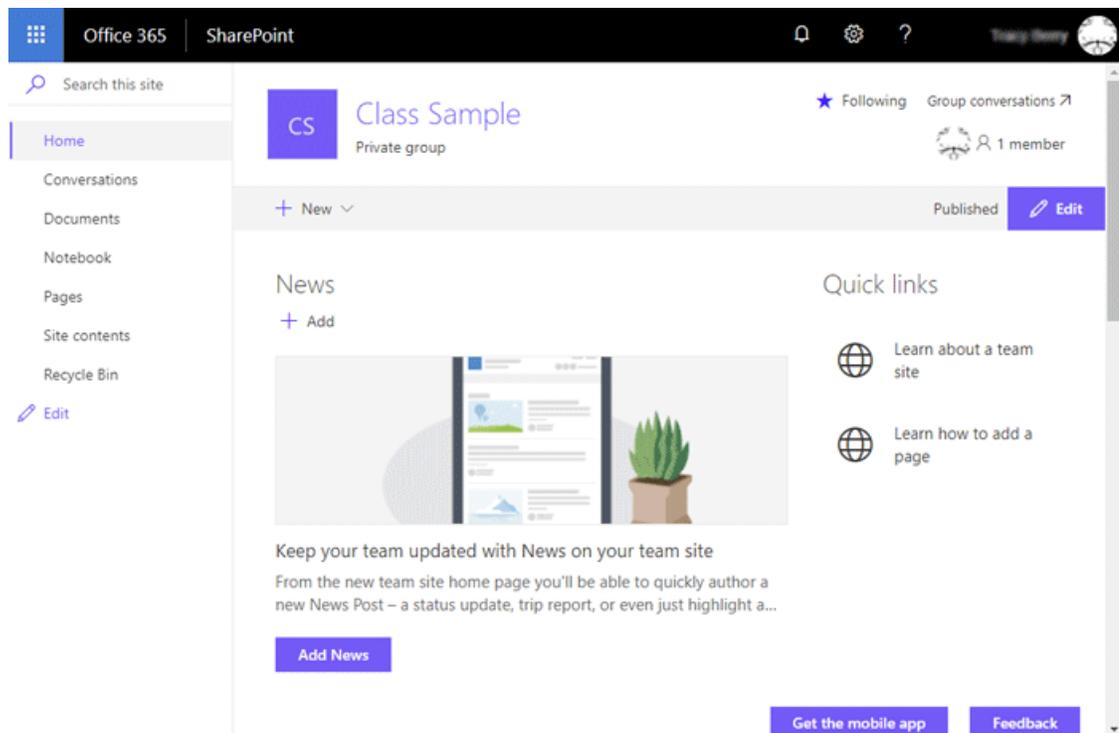
- B. Take a few moments to read through the list of links in the **Settings** menu. The items you see in the list reflect who you are logged into the site as. The list uses security trimming to show only items that you have permission to use.

Exercise 1: Team Site Navigation (Same as above)

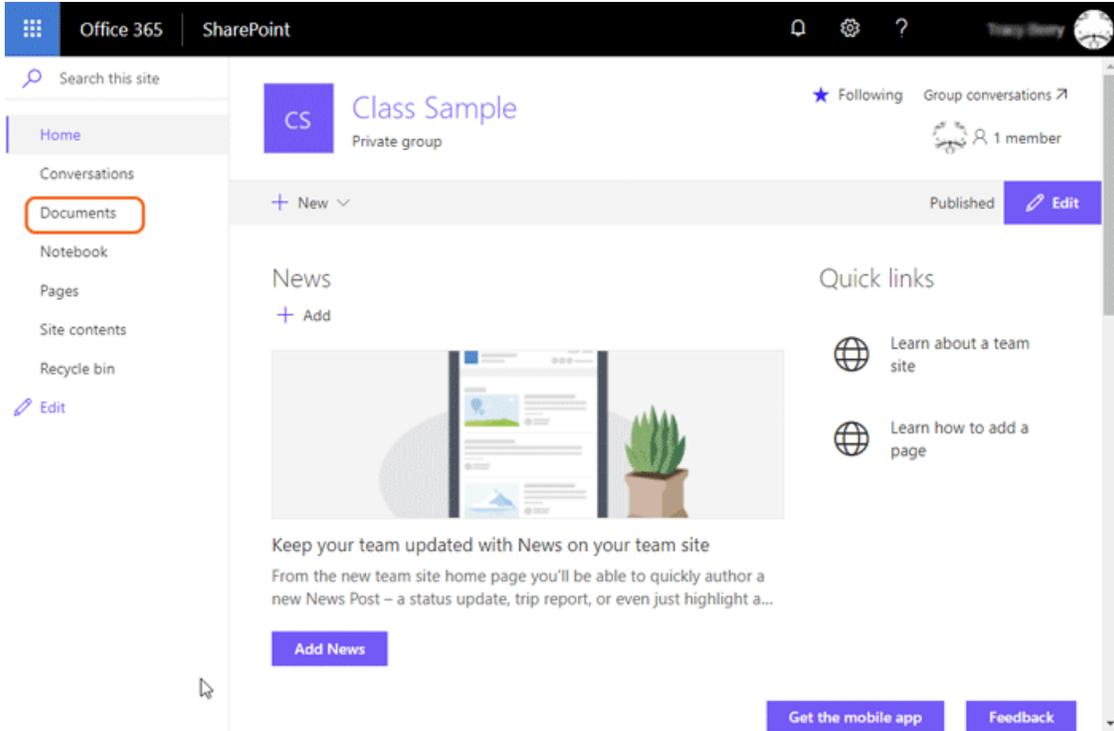
 15 to 25 minutes

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

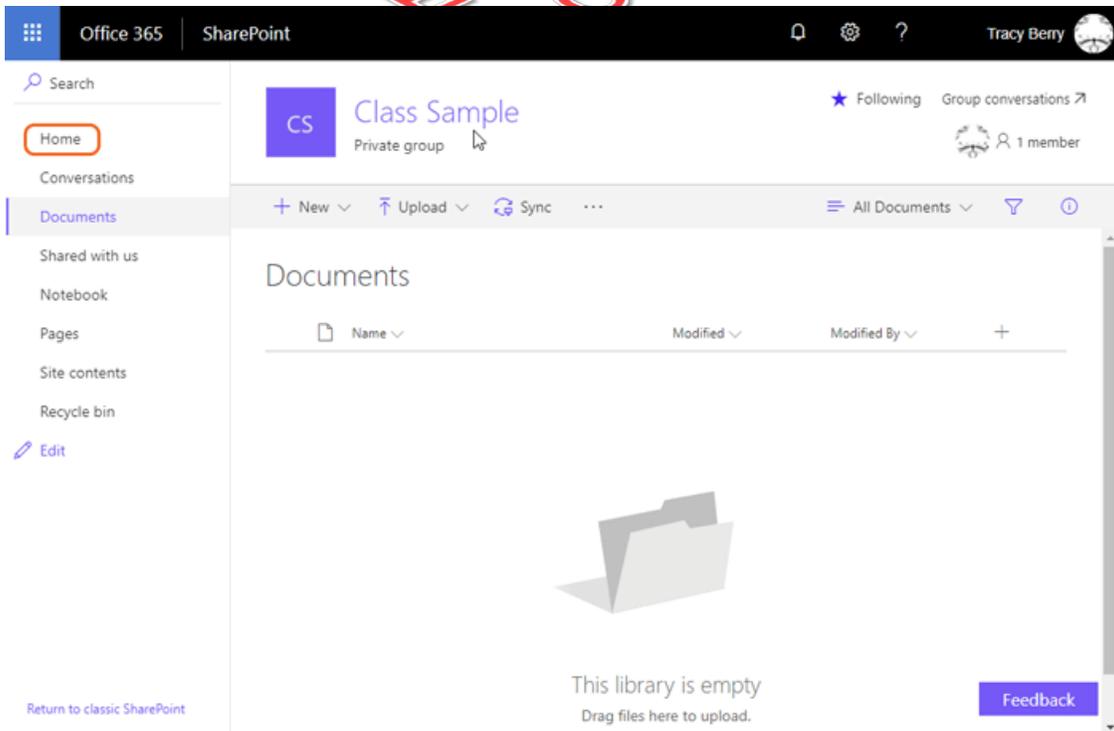
1. Navigate to your Office 365.
 - A. Launch your browser.
 - B. Log in to your Office 365.
 - C. The home page of your team site should look similar to the following:



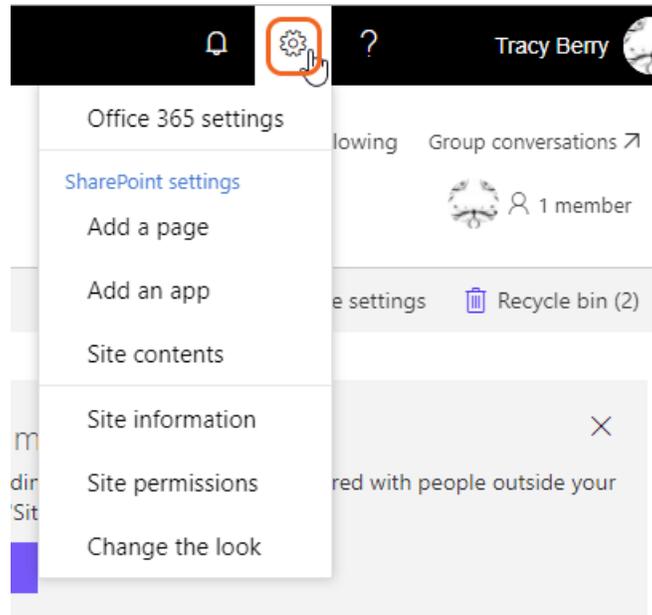
2. Navigate using the Quick Launch menu.
 - A. Select the **Documents** inside the Quick Launch menu located on the left side of the page.



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



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



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

Conclusion

In this lesson, you have learned:

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

LESSON 3

SharePoint List Basics

Topics Covered

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

Introduction

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



3.1. Creating Apps Using List Templates

In SharePoint 365, lists are created by creating Apps. The out-of-the-box Apps you can create include both lists and libraries. The primary difference between lists and libraries is that libraries always store a document with each item, such as a Word document or Excel spreadsheet. Libraries will be covered in a separate lesson in this course.

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

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

The following is a list of some of the default list templates available in an out-of-the-box SharePoint team site.

- Links
- Announcements
- Contacts
- Calendar
- Discussion Board
- Promoted Links
- Tasks
- Issue Tracking
- Custom List
- External List
- Survey

Evaluation
Copy



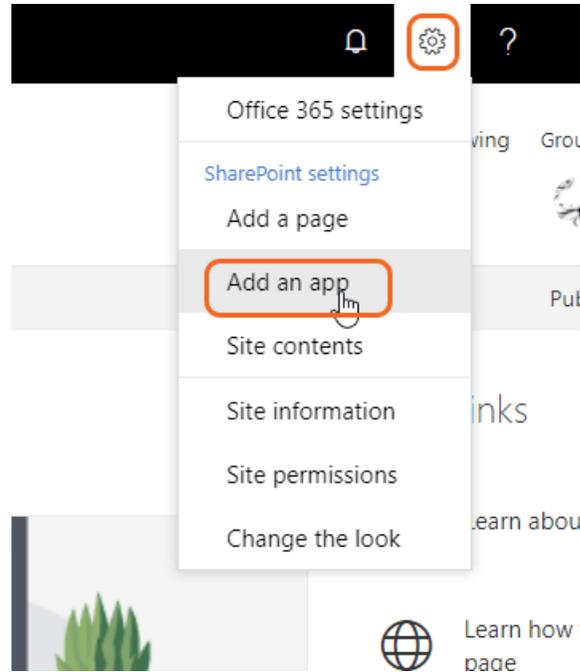
3.2. Creating Lists

❖ 3.2.1. Creating Lists Using List Templates

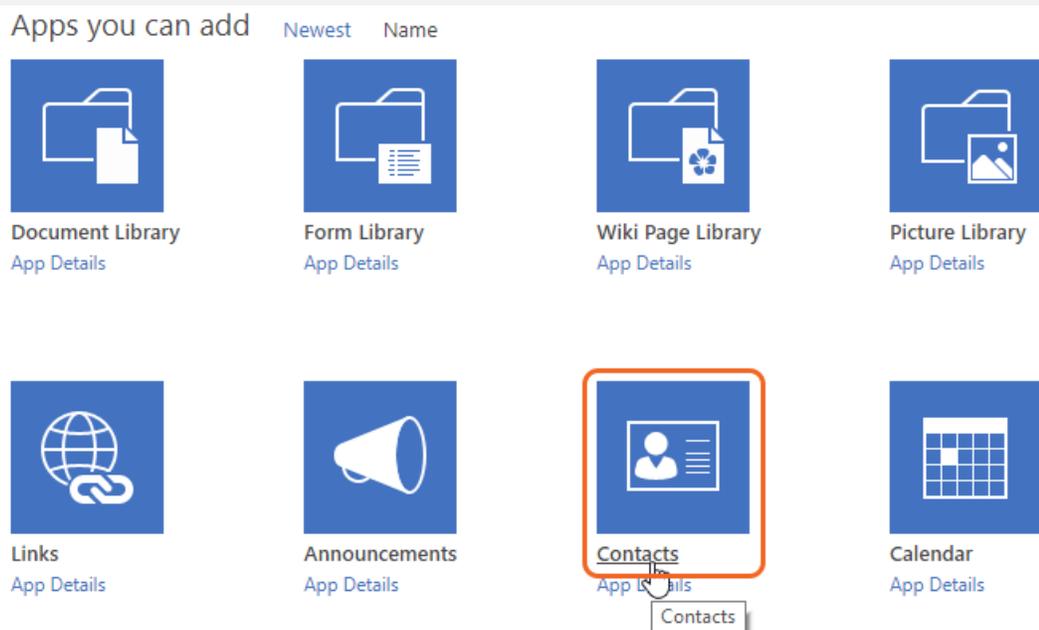
The following walk-through will show you how to create new lists using some of the standard out-of-the-box list templates.

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

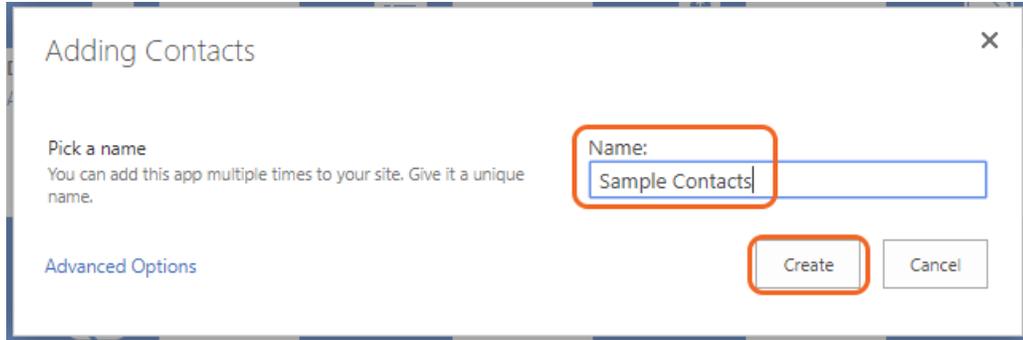
1. Create an instance of a Contacts list.
 - A. Click the **Settings** menu and then choose the **Add an app** menu item.



B. Scroll down the list of Apps templates and locate and click the **Contacts** template link.



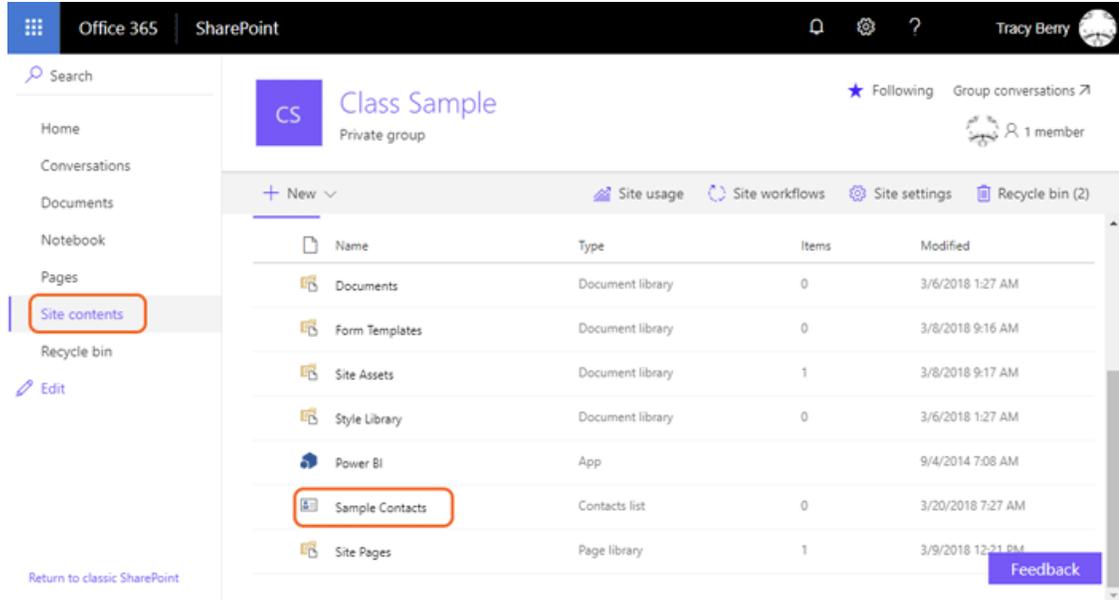
C. Enter "Sample Contacts" in the **Name** field and click the **Create** button.



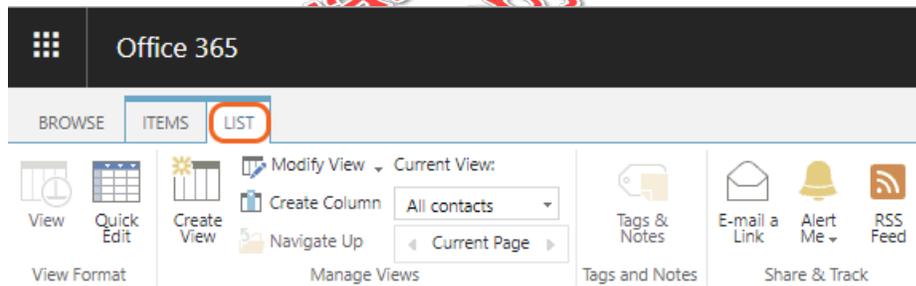
Naming Conventions

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

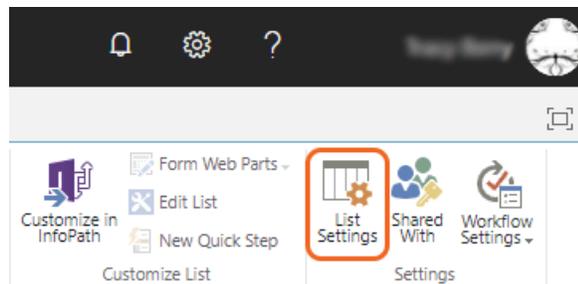
- D. Note that **Sample Contacts** are now displayed on the **Site Contents** page.



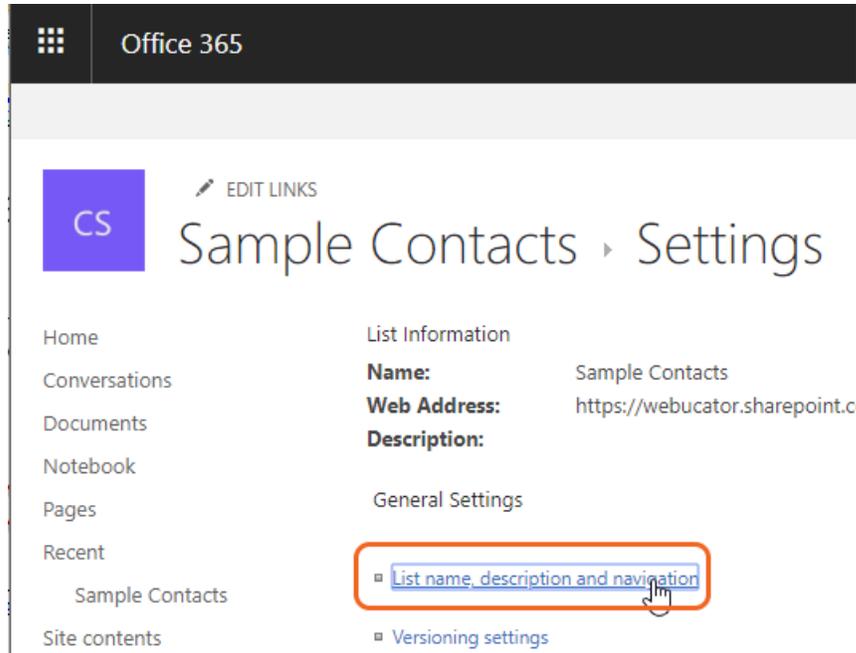
2. Add a permanent link to **Sample Contacts** in the **Quick Launch** menu.
 - A. Click the **Sample Contacts** link on the **Site Contents** menu.
 - B. Click the **List** tab to navigate to the **List** toolbar.



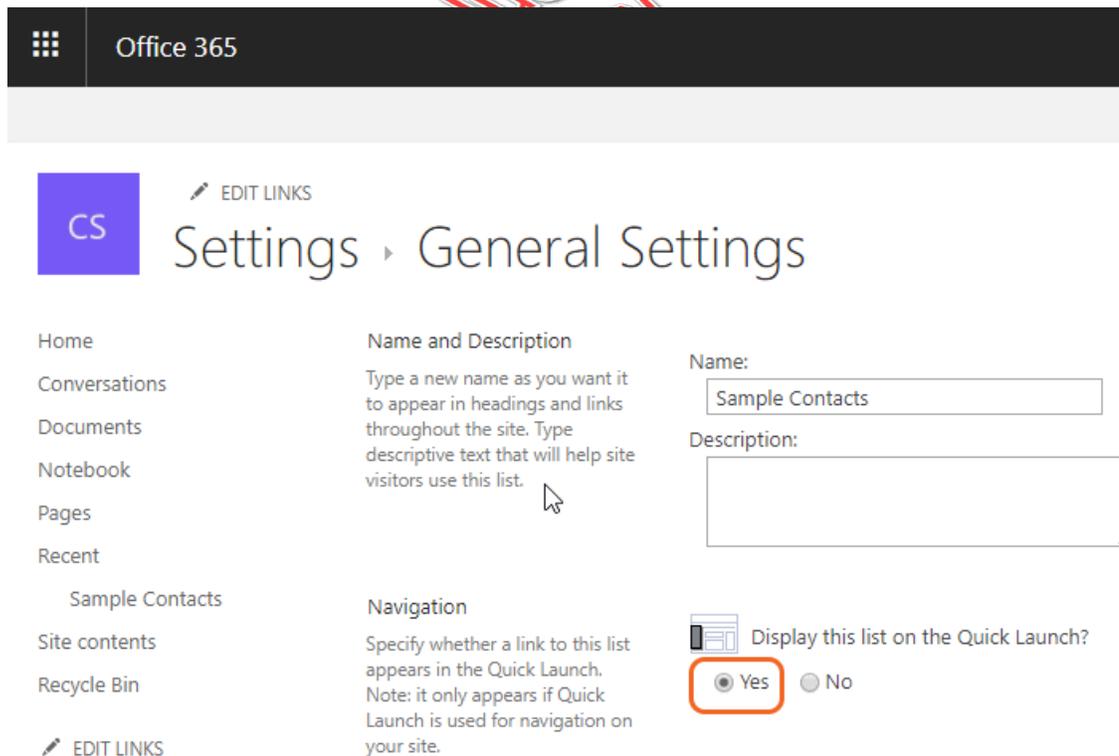
- C. Click the **List Settings** link button on the **List** tab toolbar.



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



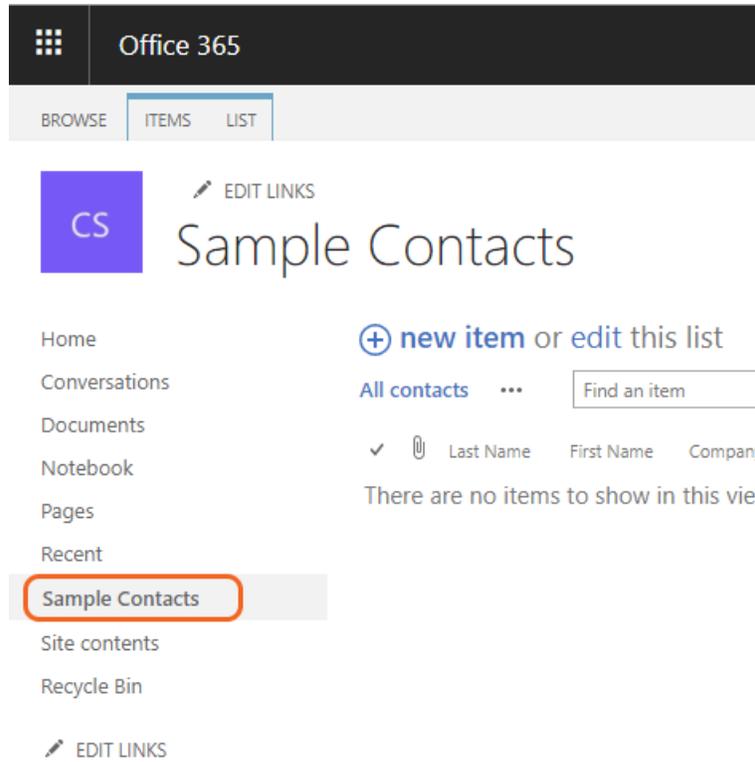
- E. Click the **Yes** radio button to add **Sample Contacts** to the site's **Quick Launch** menu and click the **Save** button.



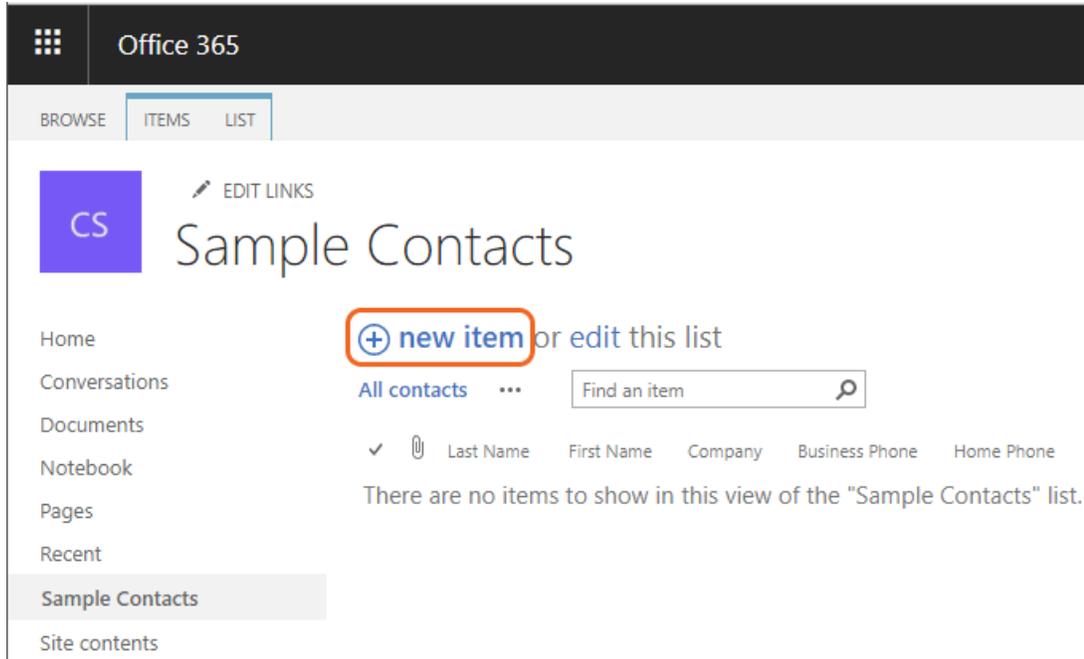
The Name Field

The **Name** field is where you would change the name of the list or library without affecting the URL.

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



3. Create a new contact item in the **Sample Contacts** list.
 - A. Click the **Sample Contacts** link in the **Quick Launch** menu.
 - B. Click the **new item** link within the **Sample Contacts** list.



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

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

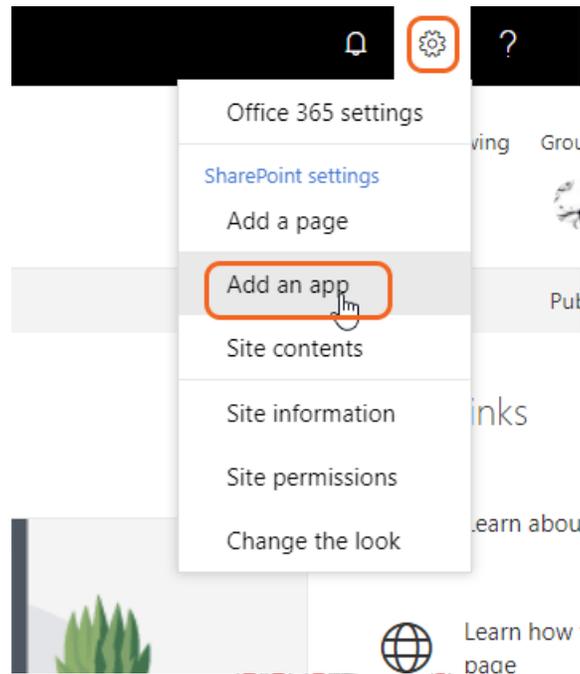


3.3. List Columns

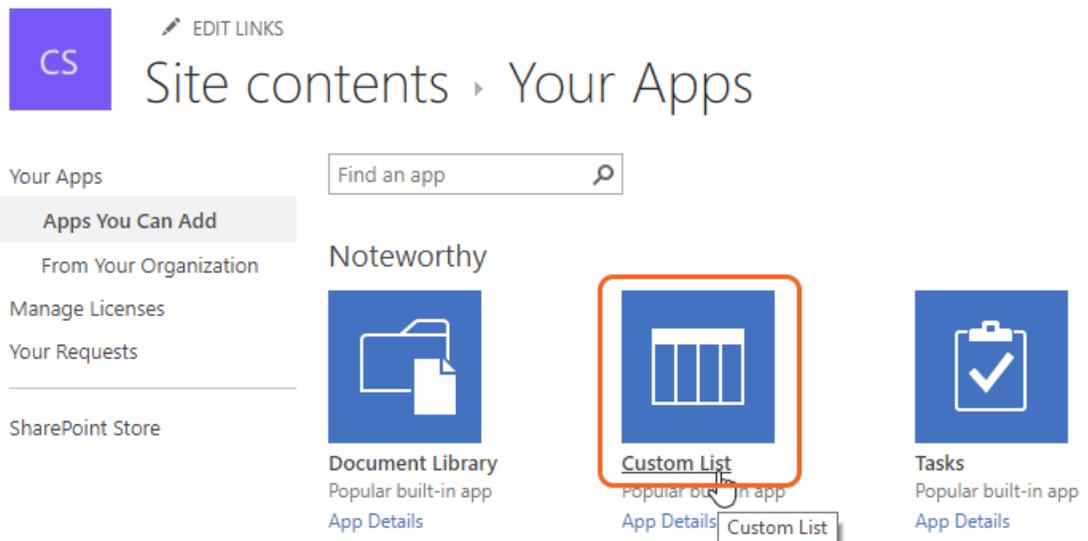
❖ 3.3.1. Creating List Columns

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

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

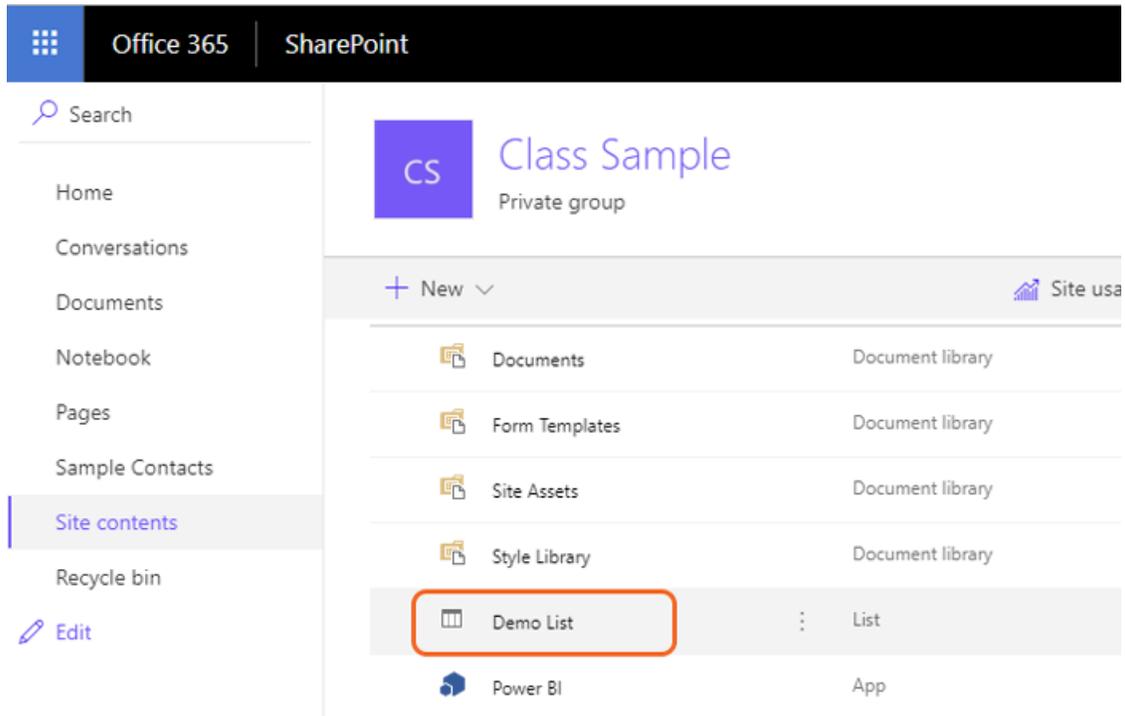


- B. Select the **Custom List** template from the list of available templates.

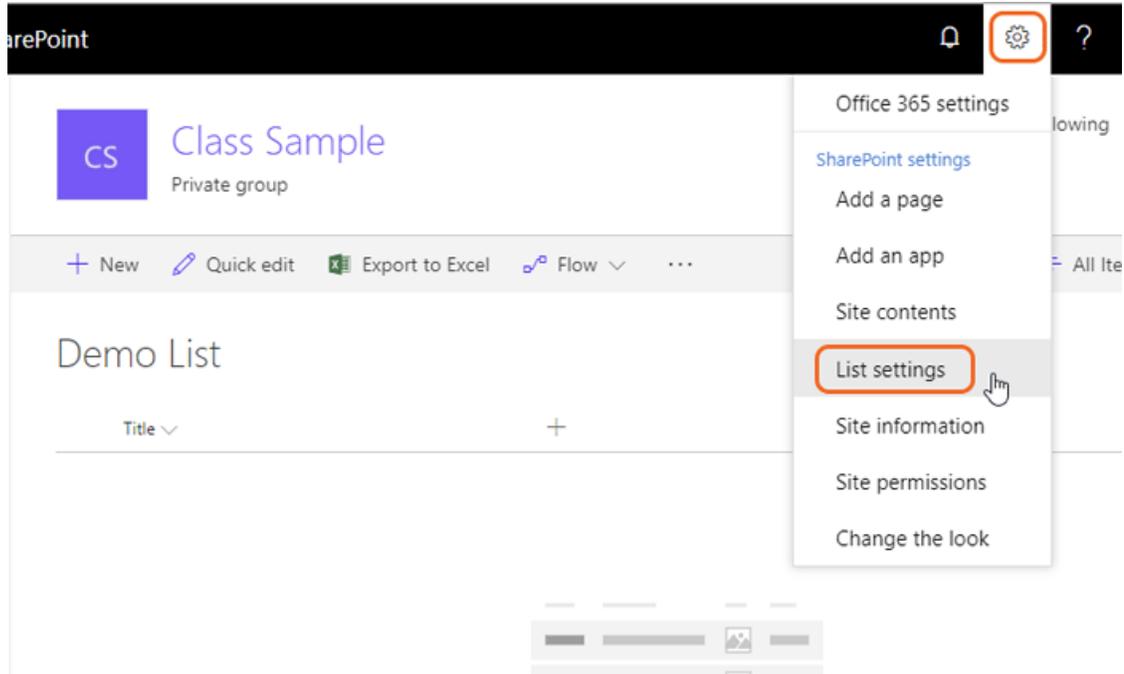


- C. Enter "Demo List" in the **Name** field and then click the **Create** button.

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



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



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



Columns

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

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

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

- D. Enter “Favorite Food” in the **Column name** field and leave the default for **The type of information in this column is:** option field set to **Single line of text**.

js > Create Column ⓘ

Name and Type

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

Column name:
Favorite Food

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)

- E. Note the **Additional Column Settings** region that allows you to set options for this **Single line of text** list column. Leave the options set to their defaults and click the **OK** button to complete creating the new list column.

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
 Yes No

Enforce unique values:
 Yes No

Maximum number of characters:

Default value:
 Text Calculated Value

Add to default view

Column Formatting:
Change the display of this column by adding JSON below.
Remove the text from the box to clear the custom formatting.
[Learn more about formatting columns with JSON](#)

3. Add a new **Choice** list column to **Demo List**.
- A. Click the **Create Column** button under the Columns category.

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

Name and Type

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

Column name:

Favorite Color

The type of information in this column is:

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

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

- Yes
- No

Enforce unique values:

- Yes
- No

Type each choice on a separate line:

Red
Blue
Green
Orange

Display choices using:

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

Allow fill-in choices:

Display choices using Options

Note the **Display choices using** options that include **Radio Buttons** and **Check Boxes**. The check boxes allows for multiple choices

(note that this feature may limit the view options) and the radio buttons provide an alternative display for single selections. The default drop-down menu takes up the least amount of room if the column is included in a view. Views will be covered in a later part of this course.

- D. Click the **OK** button to complete creating the new list column.
4. Add a new **Date and Time** list column to **Demo List**.
 - A. Click the **Create Column** button under the Columns category.
 - B. Enter “Birthday” in the **Column name** field and change **The type of information in this column is:** option field to **Date and Time**.
 - C. In the **Additional Column Settings** region, change the **Require that this column contains information** option field to **Yes** and the **Default value** option field to **Today’s Date**.

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

Yes No

Enforce unique values:

Yes No

Date and Time Format:

Date Only Date & Time

Display Format:

Standard Friendly

Default value:

(None)

Today's Date

12 AM ▼

00 ▼

Enter date in M/D/YYYY format.

Calculated Value:

Add to default view

Column Formatting:

Change the display of this column by adding JSON below.

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

[Learn more about formatting columns with JSON](#)

- D. Click the **OK** button to complete creating the new list column.
5. Add a new **Person or Group** list column to **Demo List**.
- Click the **Create Column** button under the Columns category.
 - Enter "Who" in the **Column name** field and change **The type of information in this column is:** option field to **Person or Group**.
 - In the **Additional Column Settings** region, change the **Show field** drop-down box to **Work email**.

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

Yes No

Enforce unique values:

Yes No

Allow multiple selections:

Yes No

Allow selection of:

People Only People and Groups

Choose from:

All Users

SharePoint Group:

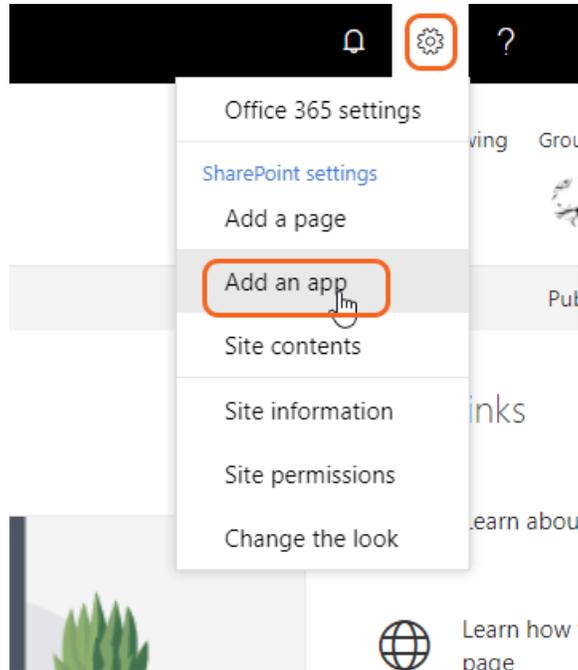
Class Sample Members ▾

Show field:

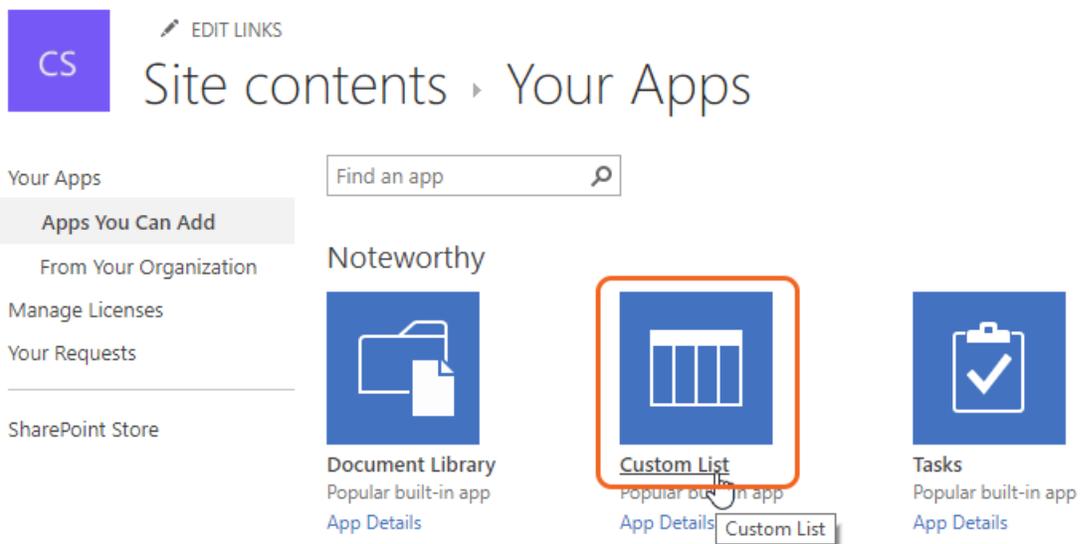
Work email ▾

Add to default view

- D. Click the **OK** button to complete creating the new list column.
6. Create a new custom list and add it as a **Lookup** list column to **Demo List**.
 - A. Create a new list in your Team Site using the **Custom List** template.
 - i. Click the **Settings** menu and then choose the **Add an app** menu item.

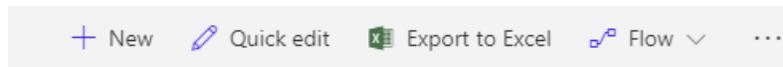


- ii. Select the **Custom List** template from the list of available templates.



- iii. Enter "States" in the **Name** field and then click the **Create** button.
- B. Click the **States** link in the **Site Contents**.
- C. Click the **List Settings** on the **Settings** to open the lists options.

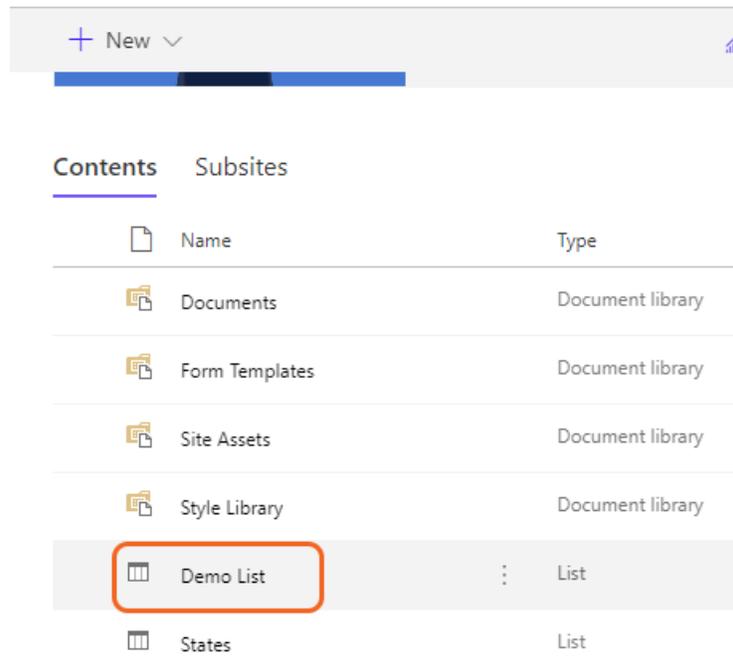
- D. Click the **Create Column** button under the Columns Category.
- E. Enter “Abbreviation” in the **Column name** field and set the **Maximum number of characters** text box under **Additional Column Settings** to “2”.
- F. Click the **OK** button to complete creating the column.
- G. Click the **new** link in the **States** list.
- H. Enter “Florida” in the **Title** field text box and “FL” in the **Abbreviation** text box.
- I. Click the **Save** button to save the new **States** item.
- J. Repeat the previous steps to create the following **States** items:



States

Title ▾	Abbreviation ▾
Florida	FL
New York	NY
California	CA
Georgia	GA
North Carolina	NC

- K. Click the **Demo List** link in the **Site Contents**.



- L. Click the **List Settings** on the **Settings** to open the lists options.
- M. Click the **Create Column** button under the Columns Category.
- N. Enter "Home State" in the **Column name** text box field and change **The type of information in this column is** option field to **Lookup (information already on this site)**.
- O. In the **Additional Column Settings** region change the **In this column** drop-down box to **Abbreviation** and select the **Title** check box under the **Add a column to show each of these additional fields** field.

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

Yes No

Enforce unique values:

Yes No

Get information from:

States

In this column:

Abbreviation

Allow multiple values

Add a column to show each of these additional fields:

Title

Compliance Asset Id

Abbreviation

ID

Modified

Created

Version

Title (linked to item)

Add to default view

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

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

A. Click the **List Settings** on the **Settings** to open the lists options.

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

Demo List ▸ Settings

List Information

Name: Demo List

Web Address: https://webucator.sharepoint.com/sites/Class_Sample/Lists/De

Description:

General Settings

▫ **List name, description and navigation**

▫ Versioning settings

Permissions and Management

▫ Delete this list

▫ Permissions for this list

- C. Click the **Display this list on the Quick Launch** option to **Yes** and click the **Save** button.

Settings ▸ General Settings

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

Name:

Description:

Navigation
Specify whether a link to this list appears in the Quick Launch. Note: it only appears if Quick Launch is used for navigation on your site.

Yes No

8. Create a sample item in the new **Demo List** to test the results of the custom columns.
- A. Click the **new item** link within the **Demo List** to create a new item.
 - B. Use the data in the following image as sample data for the new **Demo List** item, change the **Who** field data to an account name that exists in your SharePoint installation.

Save X Cancel Copy link Customize X

New item

Title *
Student Test

Favorite Food
Steak

Favorite Color
Blue

Birthday *
1/1/2018

Who
You  X

Home State
NC

Attachments
[Add attachments](#)

Save Cancel

The Who Field

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

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



3.4. Column Validation

❖ 3.4.1. Validating a List Column

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

1. Configure validation on the **Birthday** column within the **Demo List**.
 - A. Select the **Demo List** from the **Quick Launch** menu if you are not already on the list.
 - B. Click the **List Settings** on the **Settings** to open the lists options.
 - C. Click the **Birthday** 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	Required
Title	Single line of text	✓
Favorite Food	Single line of text	
Favorite Color	Choice	
Birthday	Date and Time	✓
Who	Person or Group	
Home State	Lookup	
Home State:Title	Lookup	
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](#)

- D. Expand the **Column Validation** region within the column settings page and enter `=[Birthday]<Today()` in the **Formula** field and The birthday must be earlier than the current date. in the **User message** field.

Column Validation

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

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

[Learn more about proper syntax for formulas.](#)

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

Formula:

`=[Birthday]<Today()`

User message:

The birthday must be earlier than the current date.

Delete

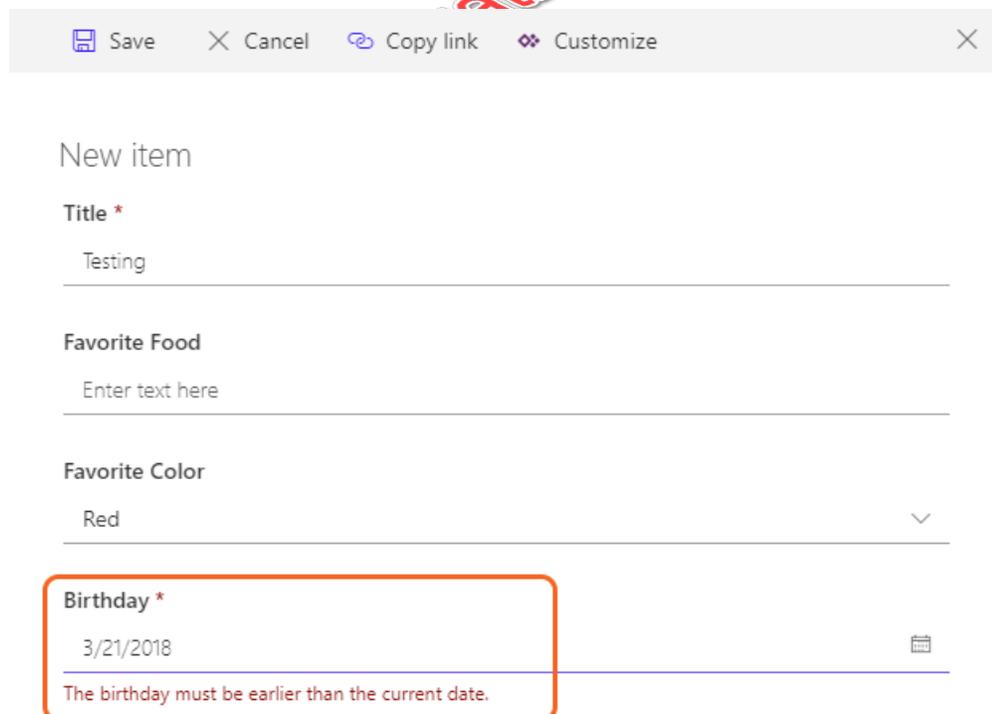
OK

Cancel

Date Formula

The formula in this example will ensure that the user cannot enter a date that is the same as or after the current date.

- E. Click the **OK** button to save the changes.
2. Test the new column for validation.
 - A. Select the **Demo List** from the **Quick Launch** to navigate back to the main **browse** view of the list.
 - B. Click the **new** link within the **Demo List** to create a new item.
 - C. In the required **Title** field, enter “Testing” and select a future date in the **Birthday** field.
 - D. Click the **Save** button. You should get a validation error message similar to the following image:



The screenshot shows a 'New item' form with the following fields:

- Title ***: Testing
- Favorite Food**: Enter text here
- Favorite Color**: Red
- Birthday ***: 3/21/2018

A red border highlights the Birthday field, which contains the date 3/21/2018. Below the date, a red error message reads: "The birthday must be earlier than the current date." The form also features a top navigation bar with buttons for Save, Cancel, Copy link, and Customize.

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.

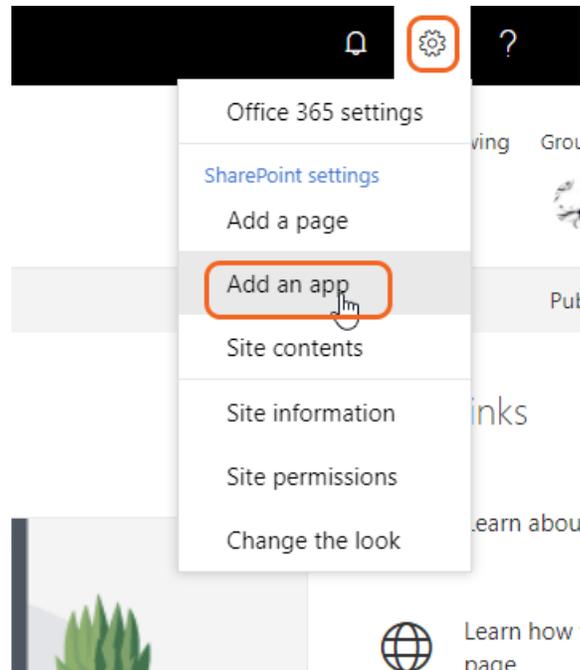
- E. Change the **Birthday** date field to a date earlier than the current date and click the **Save** button. The new item should be saved and displayed in the list.

Exercise 2: Working with Team Site Lists

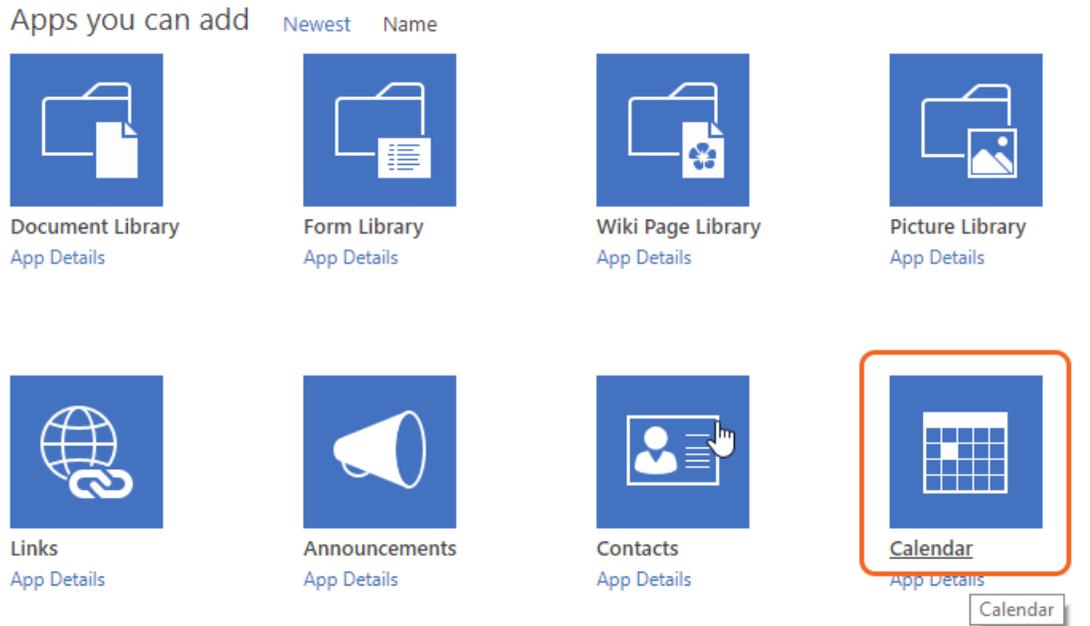
 10 to 15 minutes

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

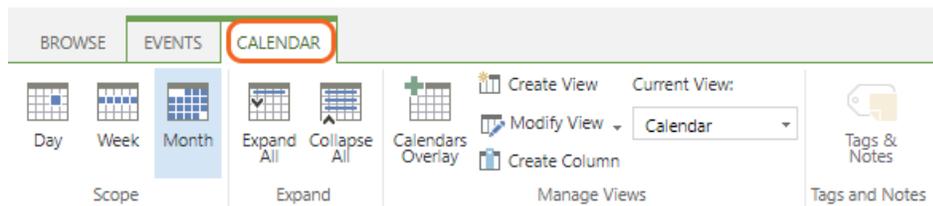
1. Create a new Calendar list.
 - A. Click the **Settings** menu and then choose the **Add an app** menu item.



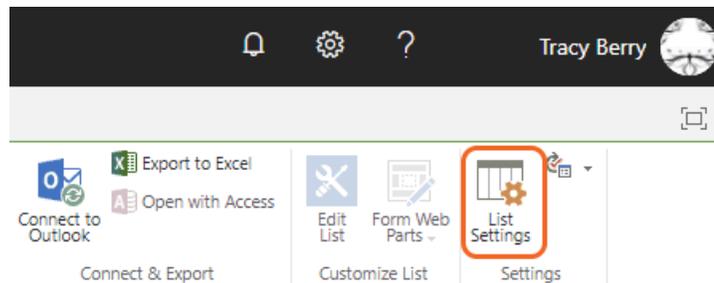
- B. Scroll down the list of templates to locate and select the **Calendar** template from the list of available templates.



- C. Enter "Calendar" in the **Name** field and then click the **Create** button.
2. Add a permanent link to **Calendar** in the **Quick Launch** menu.
 - A. Click the **Calendar** link in the **Site Contents**.
 - B. Click the **Calendar** tab to open the toolbar.



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



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

The screenshot shows the 'Calendar' list settings page. At the top, there is an 'EDIT LINKS' icon. The main heading is 'Calendar > Settings'. Below this, there are three sections: 'List Information', 'General Settings', and 'Permissions and Management'. The 'List Information' section shows the 'Name' as 'Calendar' and the 'Web Address' as 'https://webucator.sharepoint.com/sites/Class_Sample/Lists/Calendar/calend'. The 'General Settings' section has four options: 'List name, description and navigation' (highlighted with a red box and a mouse cursor), 'Versioning settings', 'Advanced settings', and 'Validation settings'. The 'Permissions and Management' section has four options: 'Delete this list', 'Permissions for this list', 'Workflow Settings', and 'Enterprise Metadata and Keywords Settings'.

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

Settings ▸ General Settings

Name and Description

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

Name:

Calendar

Description:

Navigation

Specify whether a link to this list appears in the Quick Launch. Note: it only appears if Quick Launch is used for navigation on your site.



Display this list on the Quick Launch?

Yes No

Group Calendar Options

Specify whether this calendar list works as group calendar.

Use this calendar to share member's schedule?

Yes No

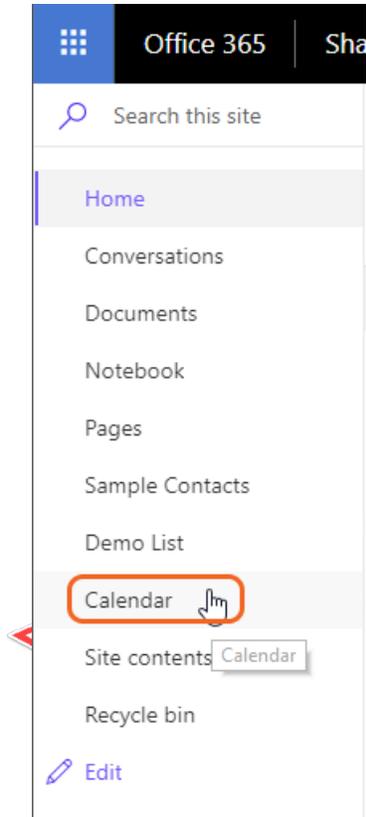
Save

Cancel

Use this calendar to share member's schedule

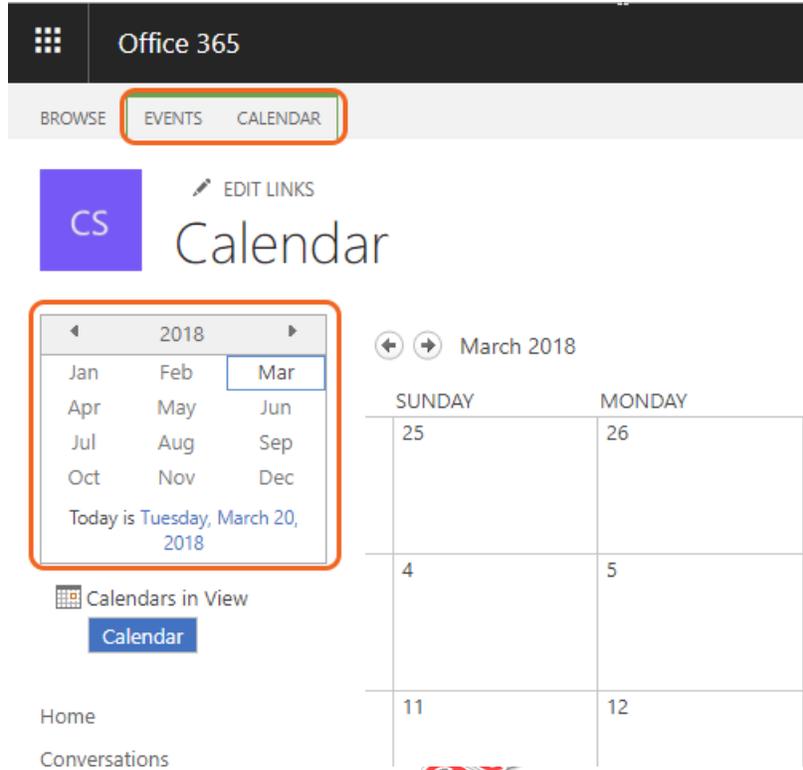
Note the option to **Use this calendar to share member's schedule**. The default is **No**, which makes the calendar events visible to everyone who has view permissions to the list. If you set the option to **Yes**, then events have an added option to invite attendees. Only attendees that have been invited by the person creating the event will see the event when they view the calendar.

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

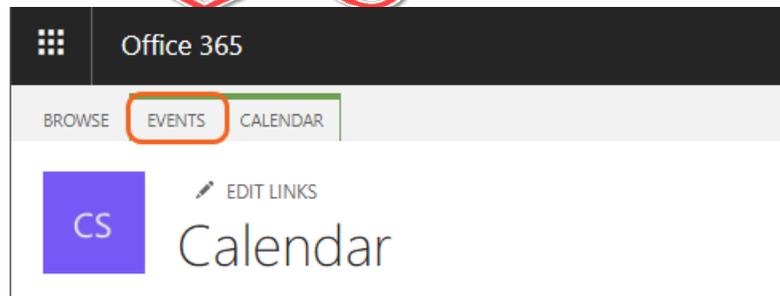


3. Create a Calendar entry.

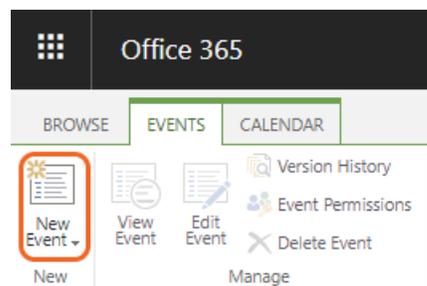
- A. Click the **Calendar** link within the **Quick Launch** menu. This will take you to a special view of the calendar.
- B. Note how this calendar view has added a couple of new tabs to the top of the page next to the **Browse** tab. In addition, the **Quick Launch** has been modified with a tool that allows you to change the year and month being viewed.



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



D. Click the **New Event** link button in the **Events** toolbar.



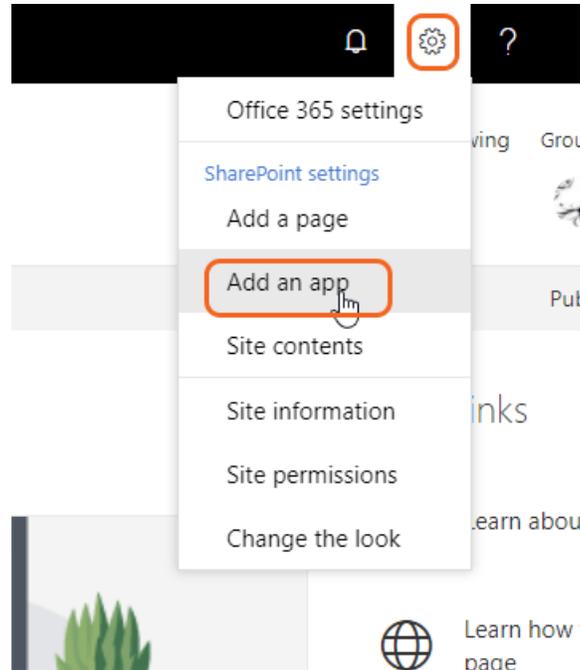
- E. Fill in the form with whatever values you like. You must enter values for the **Title**, **Start Time**, and **End Time** fields, These are required fields as indicated by the blue asterisks next to their labels.

The screenshot shows the 'Calendar - New Item' dialog box. At the top, there is a ribbon with the 'EDIT' tab selected. The ribbon contains several groups: 'Commit' with 'Save' and 'Cancel' buttons; 'Clipboard' with 'Paste', 'Cut', and 'Copy' icons; 'Actions' with 'Attach File' icon; and 'Spelling' with 'ABC' and 'Spelling' icons. Below the ribbon are the following fields:

- Title ***: A text input field with a blue border and a mouse cursor.
- Location**: A text input field.
- Start Time ***: A date field set to 3/20/2018, a time field set to 10 AM, and a minute field set to 00.
- End Time ***: A date field set to 3/20/2018, a time field set to 11 AM, and a minute field set to 00.
- Description**: A large text area.
- Category**: A radio button selected for a dropdown menu, and another radio button for 'Specify your own value:' with a text input field.
- All Day Event**: A checkbox with the text 'Make this an all-day activity that doesn't start or end at a specific hour.'
- Recurrence**: A checkbox with the text 'Make this a repeating event.'

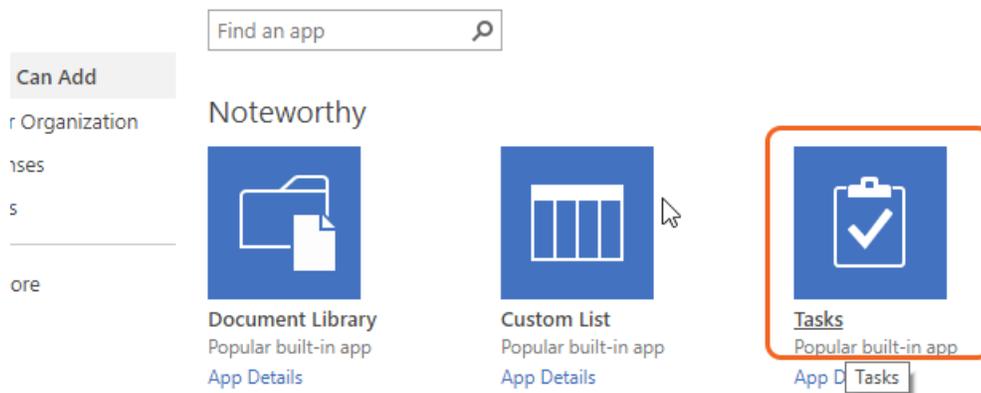
At the bottom right, there are 'Save' and 'Cancel' buttons.

- F. Click the **Save** button once you have finished filling out the form.
- G. Verify that the calendar displays with a shaded bar and event title across the days the new event is scheduled.
- H. Feel free to experiment by creating additional events in the calendar.
4. Create a new Tasks list.
- A. Click the **Settings** menu and then choose the **Add an app** menu item.



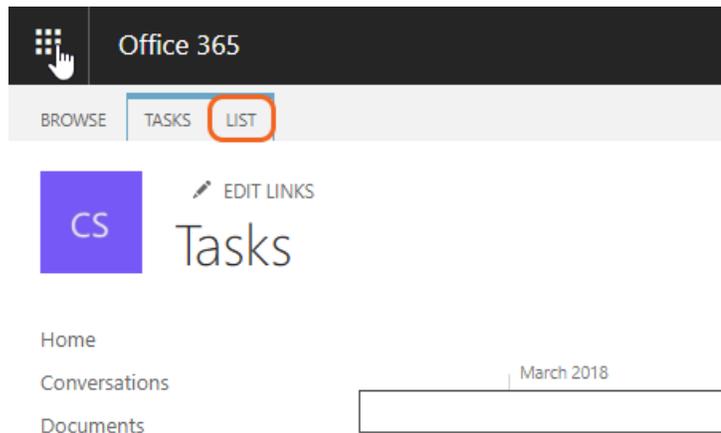
- B. Scroll down the list of templates to locate and select the **Tasks** template from the list of available templates.

Site contents ▸ Your Apps

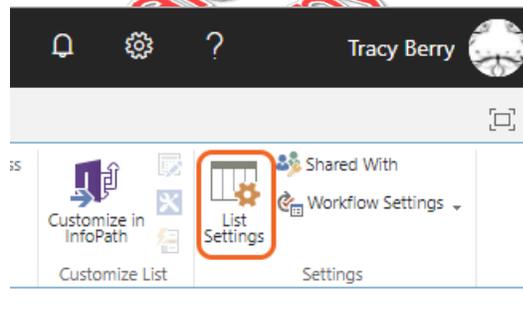


- C. Enter "Tasks" in the **Name** field and then click the **Create** button.
- 5. Add a permanent link to **Tasks** in the **Quick Launch** menu.
 - A. Click the **Tasks** link in the **Site Contents** menu.

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



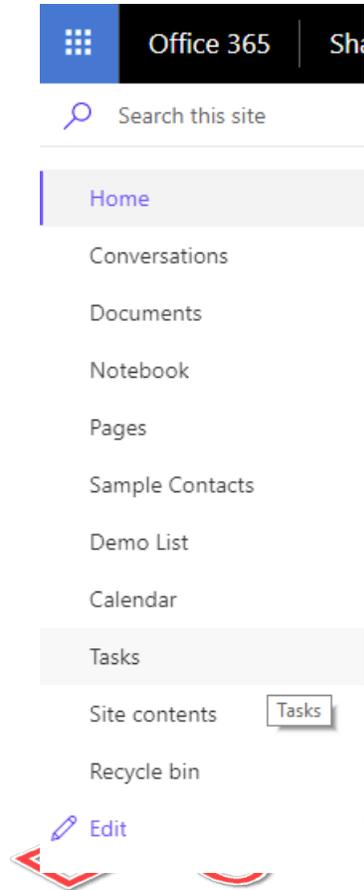
C. Click the **List Settings** link button on the **List** tab toolbar.



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

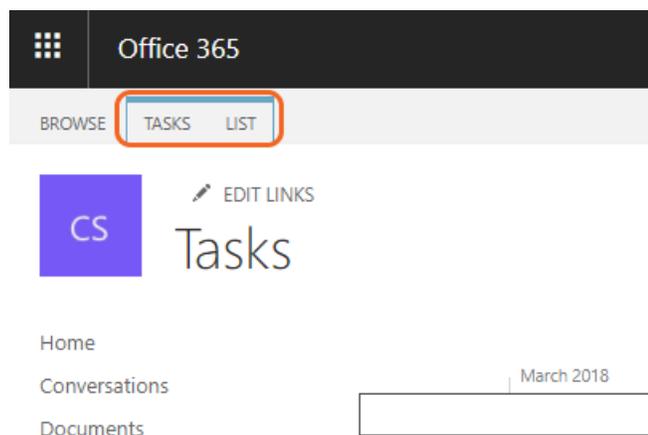
E. Click the **Yes** radio button to add **Tasks** to the site's **Quick Launch** menu and click the **Save** button.

F. Note that **Tasks** now shows on the site's **Quick Launch** menu.

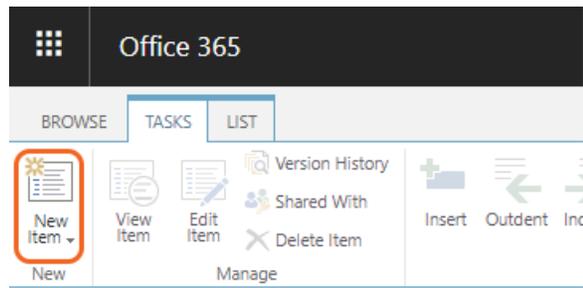


6. Create a new Task.

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



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



D. Click the **New Item** link in the Task list's toolbar to open the new task form.

A screenshot of the Office 365 'New Task' form. The form is displayed in a window with the Office 365 header. The navigation bar shows 'BROWSE' and 'EDIT' tabs. The toolbar includes icons for 'Save', 'Cancel', 'Paste', 'Copy', 'Attach File', and 'Spelling'. The form itself has a left-hand navigation pane with options like 'Home', 'Conversations', 'Documents', 'Notebook', 'Pages', 'Recent', 'States', 'Sample Contacts', 'Demo List', and 'Calendar'. The main content area contains the following fields:

- Task Name ***: A text input field.
- Start Date**: A date picker field.
- Due Date**: A date picker field.
- Assigned To**: A text input field with the placeholder text 'Enter names or email addresses...'.

Below the 'Assigned To' field, there is a 'SHOW MORE' link. At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

E. Click the **SHOW MORE** link in the form to open the view the additional task fields.

% Complete %

Description

Predecessors

Priority

Task Status

F. Use the following table for information to fill in the new task form:

Field	Data
Title:	Type "Complete lesson on creating SharePoint lists"
Priority:	Select (2) Normal
Status:	Select In Progress
% Complete	Type "50"
Assigned To:	Enter your account name here.
Description:	Type "Creating and working with SharePoint lists."
Start Date:	Select (Date course started)
Due Date:	Select (Date course ends)

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

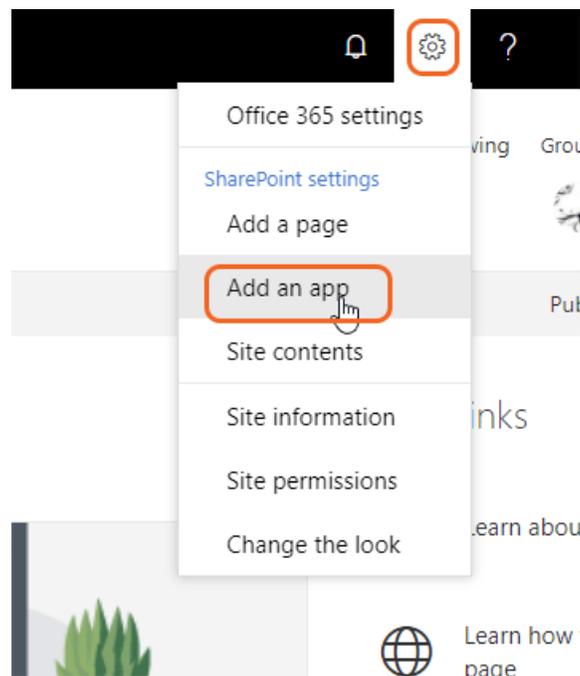
H. Verify that the Task list displays with the new task you created. Feel free to experiment by creating additional tasks in the Tasks list.

Exercise 3: Create Custom Lists and Columns

 15 to 25 minutes

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

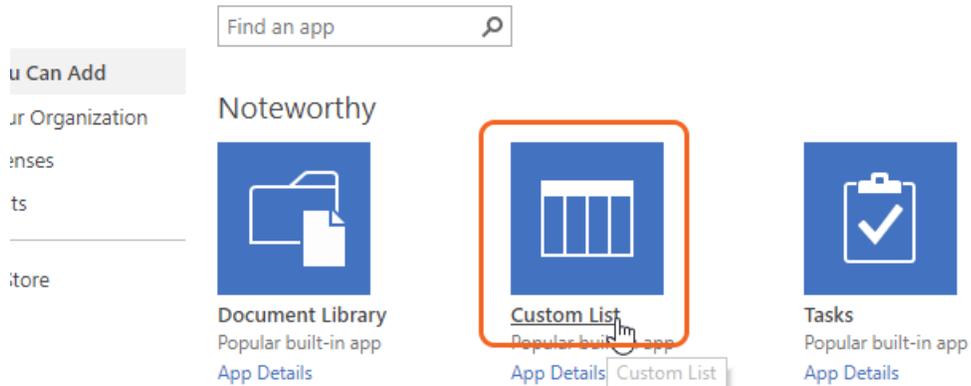
1. Create a new list in your Team Site using the **Custom List** template.
 - A. Click the **Settings** menu and then choose the **Add an app** menu item.



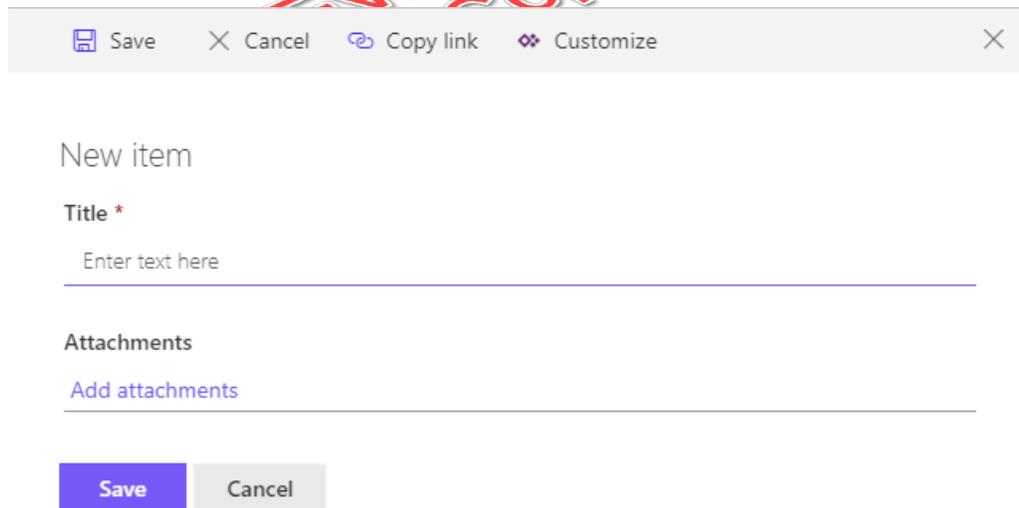
- B. Select the **Custom List** template from the list of available templates.

EDIT LINKS

Site contents › Your Apps



- C. Enter “Favorite Cars” in the **Name** field and then click the **Create** button.
2. Add custom columns to the new **Favorite Cars** list.
 - A. Click the **Favorite Cars** link in the **Site Contents** menu.
 - B. Click the **new** in the main page. This will open a new list item.



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

- E. Click the **Create Column** in the Columns category.

Columns

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

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

- **Create column**
- Add from existing site columns
- Column ordering
- Indexed columns

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

Settings ▸ Create Column ⓘ

Name and Type

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

Column name:

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 (\$, ¥, €)

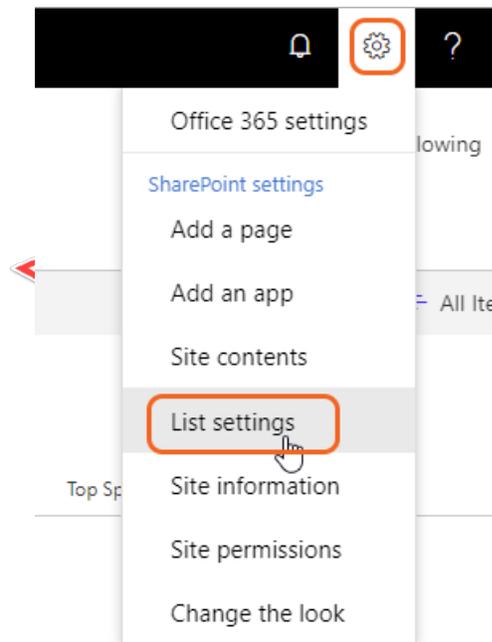
IFS

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

- G. Click the **OK** button to create and save the changes to the new list column.
- H. Repeat the steps above to create two additional columns and use the following table for information about the new columns:

Column name	Data type
Top Speed	Number
Price	Currency

- I. Keep the default column settings for the new **Top Speed** and **Price** columns based on their data types. Take a moment to note that the different data types have different additional settings. For example, the **Currency** data type has a currency format selection.
3. Rename the existing **Title** column in the **Favorite Cars** list to **Make**.
 - A. Verify that the newly created **Favorite Cars** list is selected in your site's **Quick Launch** menu. Select it if it is not.
 - B. Click the **List Settings** on the **Settings** to open the lists options.



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

Columns

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

Column (click to edit)	Type	Required
Title	Single line of text	✓
Model	Single line of text	
Top Speed	Number	
Price	Currency	
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](#)

- 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.
- To rename this column, type over the text in the **Column name** field with the text "Make".
- Click the **OK** button to save your changes and return to the list settings page.
- Verify that the old column "Title" has been renamed to "Make" in the column group.

Columns

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

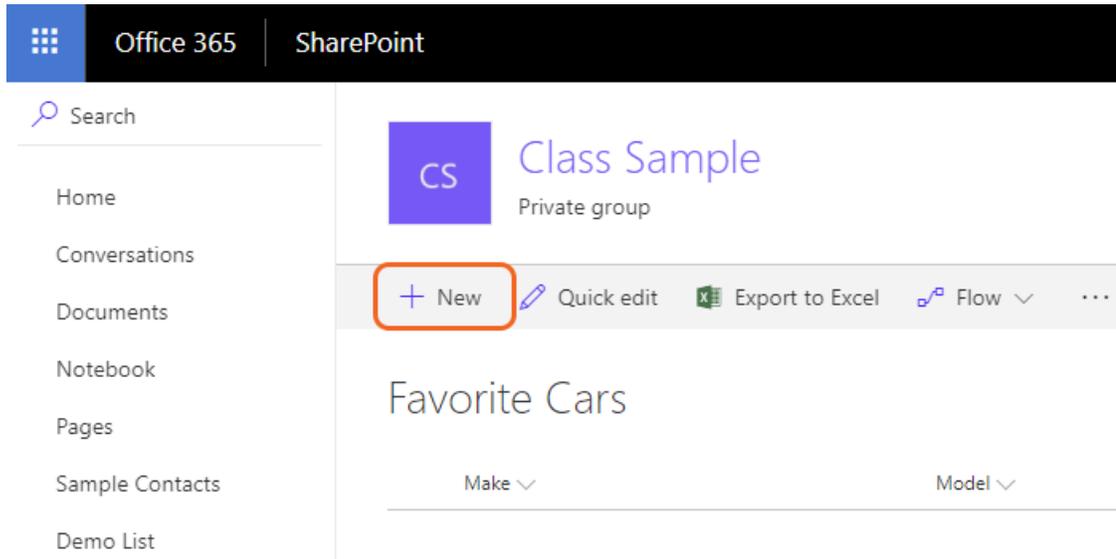
Column (click to edit)	Type	Required
Make	Single line of text	✓
Model	Single line of text	
Top Speed	Number	
Price	Currency	
Modified	Date and Time	
Created	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	

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

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

The screenshot shows the SharePoint interface. At the top, there is a navigation bar with the Office 365 logo. Below it, the 'Favorite Cars' link is highlighted with an orange box. To the right of the link is the 'Settings' link. Below the navigation bar, there is a list of links in the Quick Launch: Home, Conversations, Documents, Notebook, Pages, Recent, Favorite Cars (highlighted with an orange box), States, and Sample Contacts. On the right side, there is a 'List Information' section with the following details: Name: Favorite Cars, Web Address: https://webucator.sharepoint, and Description: (empty). Below this is a 'General Settings' section with three options: List name, description and navigation (highlighted with a blue box), Versioning settings, and Advanced settings.

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



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

Save
Cancel
Copy link
Customize
✕

New item

Make *

Model

Top Speed

Price

Attachments

[Add attachments](#)

Save
Cancel

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

Make	Model	Top Speed	Price
Bugatti	Veyron SS	268	2,420,000.00

- D. To add multiple cars to the new **Favorite Cars** list, you can use the **Quick edit** link to enter items in a spreadsheet type of view. You can use the

following table for data to input but feel free to use your own “favorite cars” as well.

Make	Model	Top Speed	Price
SSC	Ultimate Aero TT	257	654,500.00
Koenigsegg	CCX	250	720,500.00
Saleen	S7 Twin Turbo	248	597,000.00
McLaren	F1	240	1,100,000.00
Ferrari	458 Italia	202	150,000.00
Ferrari	599 GTO	208	383,500.00

E. Compare your list to the following image:

The screenshot shows a SharePoint list interface. At the top, there are navigation options: '+ New', 'Quick edit', 'Export to Excel', and 'All Items'. Below the title 'Favorite Cars', there is a table with the following data:

Make	Model	Top Speed	Price
Bugatti	Veyron SS	268	\$2,420,000.00
SSC	Ultimate AeroTT	257	\$654,500.00
Koenigsegg	CCX	250	\$720,500.00
Saleen	S7 Twin Turbo	248	\$597,000.00
McLaren	F1	240	\$1,100,000.00
Ferrari	458 Italia	202	\$150,000.00
Ferrari	599 GTO	208	\$383,500.00

It should look the same or similar depending on whether you used your own “favorite cars” or not. Note the **Price** column is formatted as currency for you based on the data type you chose for that column.

F. Click the **Done** link to exit the editing view. Depending on the template used to create the site, you may see Stop instead of Done.

Conclusion

In this lesson, you have learned:

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

Evaluation
Copy

LESSON 4

Library Basics

Topics Covered

- New libraries using library templates.
- Working with the different libraries in a default Team Site.
- Adding columns to a library.
- Checking out documents for editing.
- Deleting and restoring documents from document libraries.
- Enabling 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 a underlying document. So in addition to the data stored in library columns, the document stores its own data based on the type of document. Because of the extra data that can be stored in columns that can be used to filter and search by and features such as versioning, libraries are considered a great replacement for the more traditional file server system. Libraries are, like lists, a fundamental building block in a SharePoint site.



4.1. Library Templates

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

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

The following is a list of some of the out-of-the-box library templates that come with a SharePoint 365 Team Site.

- Document Library
- Form Library
- Wiki Page Library
- Picture Library

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



The **New** link will prompt you for what type of Office document you want to create. Once a choice is made, the document will be opened in a browser window ready to be edited.

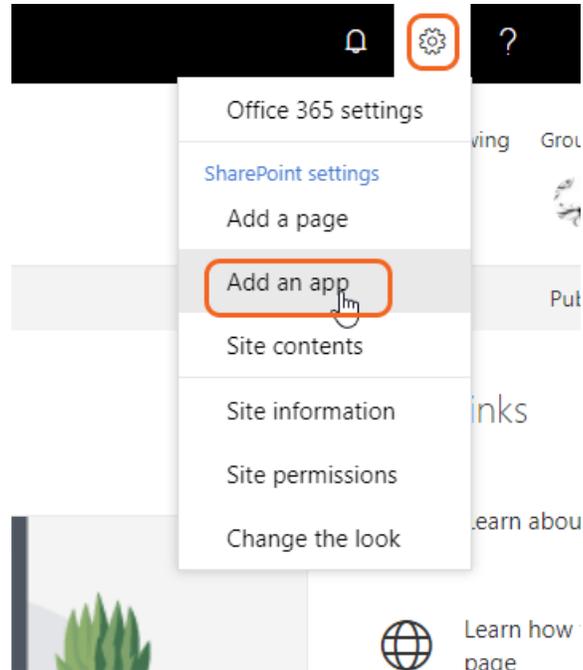


4.2. Creating Libraries

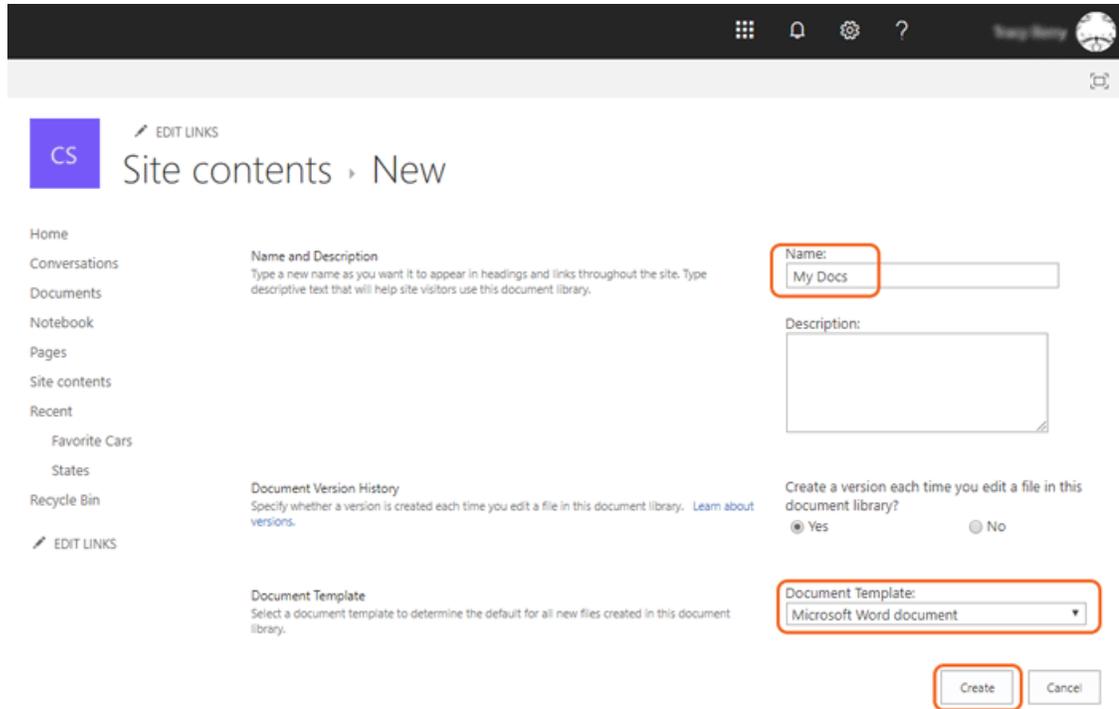
❖ 4.2.1. Creating a Document Library and Adding Columns

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

1. Create a new Document Library.
 - A. Click the **Settings** menu and then choose the **Add an app** menu item.



- B. Select the **Document Library** template and click the **Advanced Options** button to view the options.
- C. In the expanded options form type “My Docs” in the **Name:** field, click **Yes** for the **Document Version History** option (versioning will be explored in a later walk-through) and verify that **Microsoft Word document** is selected in the **Document Template** drop-down box. Click the **Create** button to complete the process.

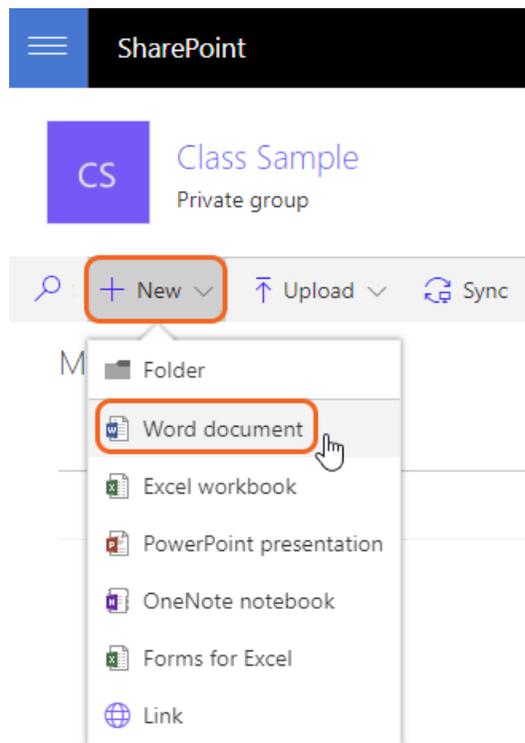


Naming Conventions

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

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

- A. Click the **Library Settings** on the **Settings** to open the lists options. NOTE: If you use a different template or Classic layout you may need to click the Library tab, Library settings.
 - B. Click **Create Column**.
 - C. Enter “Department” in the **Column name** field and leave the default for **The type of information in this column is** option field set to **Single line of text**.
 - D. Leave the rest of the column options at their default settings and click the **OK** button to complete creating the new library column.
3. Click the **New** button and choose **Word document**.



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

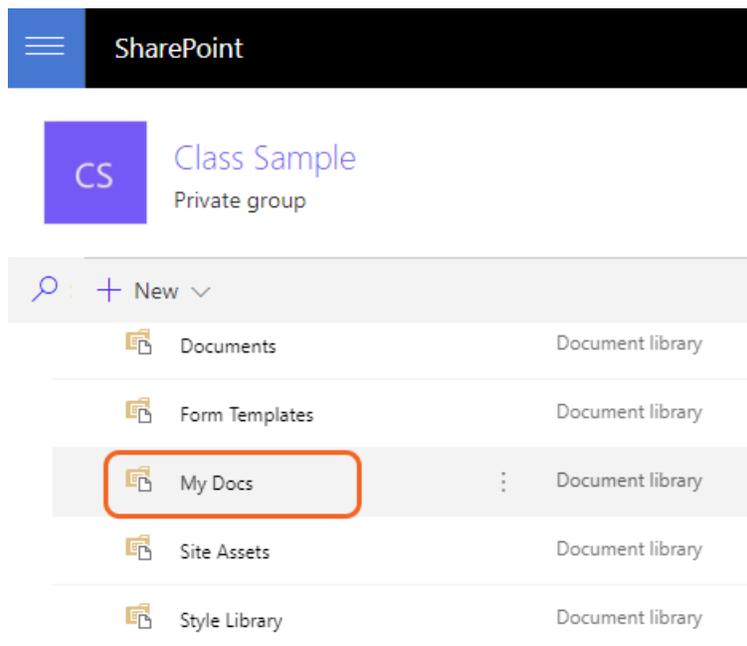


4.3. Managing Documents and Versioning

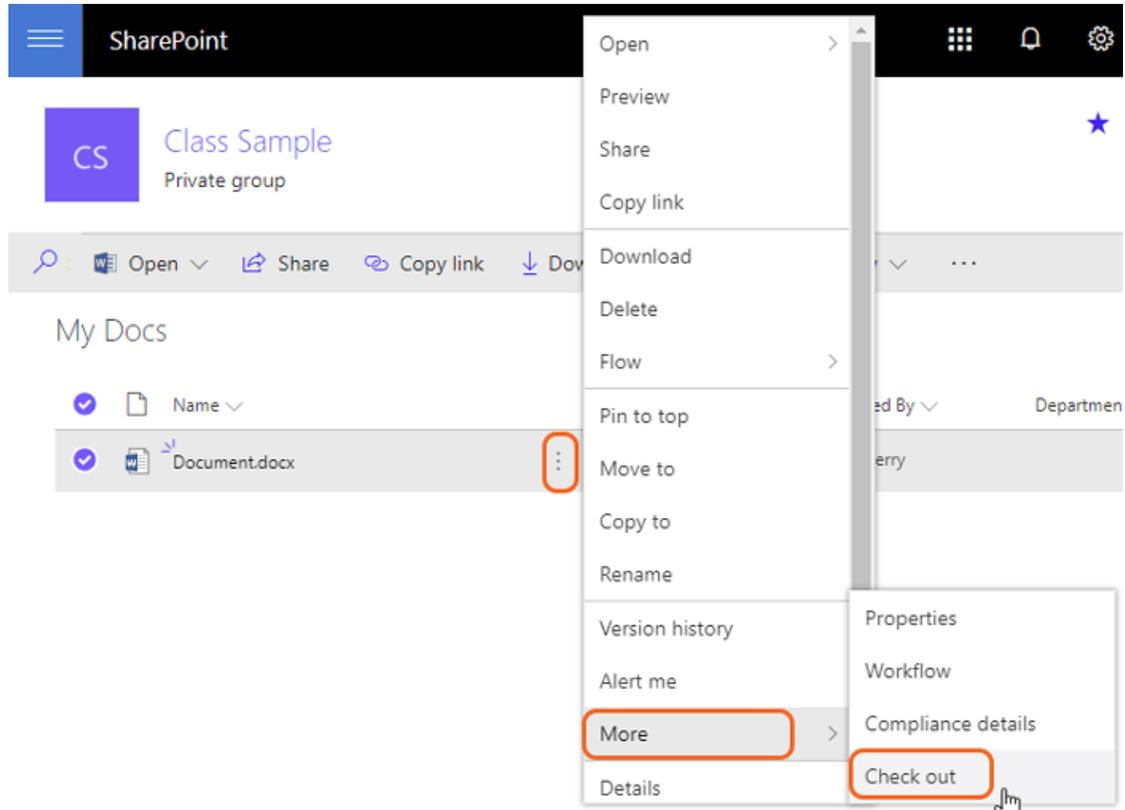
❖ 4.3.1. Checking Out Documents

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

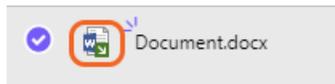
1. **Check Out** a document from the **My Docs** library.
 - A. Click the **My Docs** link in the **Site Contents** menu.



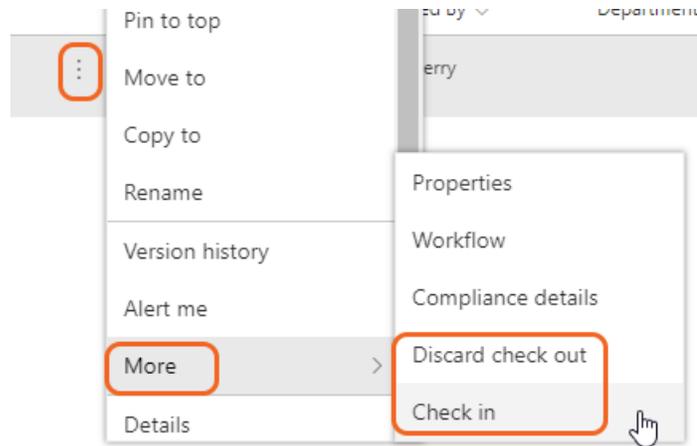
- B. Click the ellipsis button next to the title of the item and then click **More > Check Out**. NOTE: This may be under a category named Advanced instead of More if your settings are different than this sample.



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



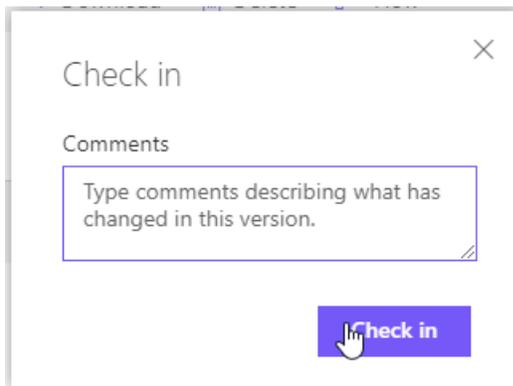
2. Check the file back in to **My Docs** library.
- A. Repeat the previous steps to open the item menu for the document that is currently checked out.
 - B. Note that the item menu is slightly different. Instead of the menu option **Check Out**, you have two new options **Check In** and **Discard Check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



Discard Check Out

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

- C. Click the **Check In** option from the item menu.
- D. In the **Check In** dialog form, note that you have the option to **Retain your check out after checking in**. Leave the option set to **No** and click the **OK** button to complete the check in.

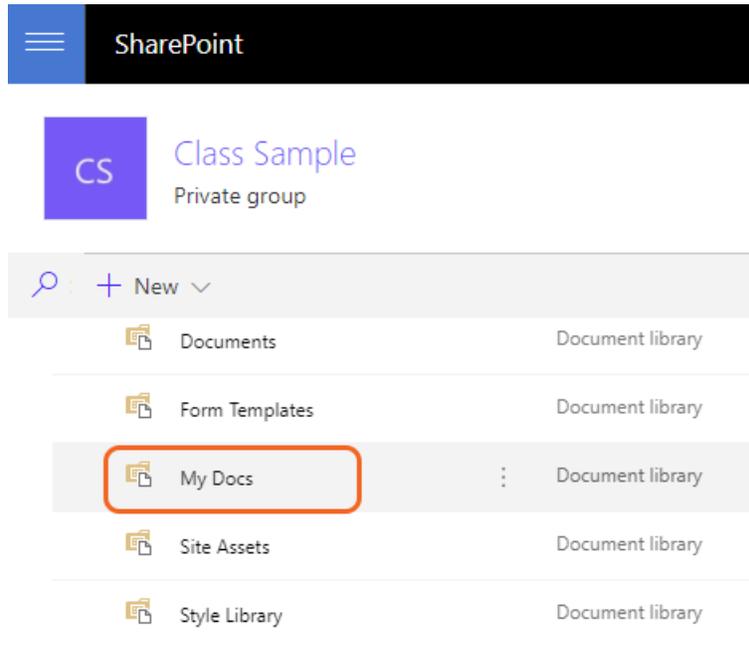


❖ 4.3.2. Deleting and Restoring Documents

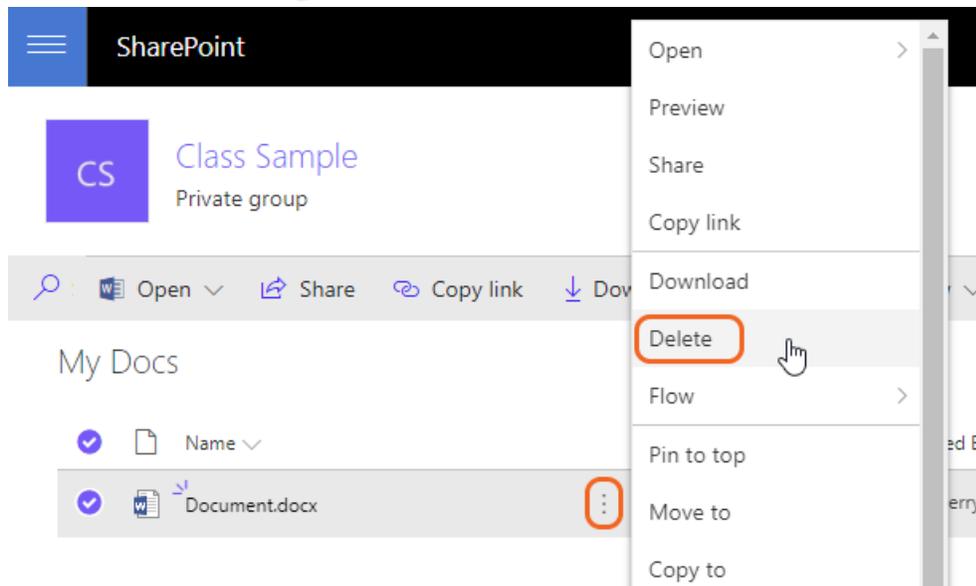
The following walk-through will show you how to delete a document from the **My Docs** library and restore it from the **Recycle Bin**.

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

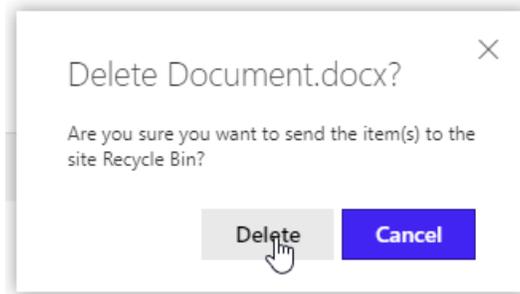
A. Click the **My Docs** link in the **Site Contents** menu.



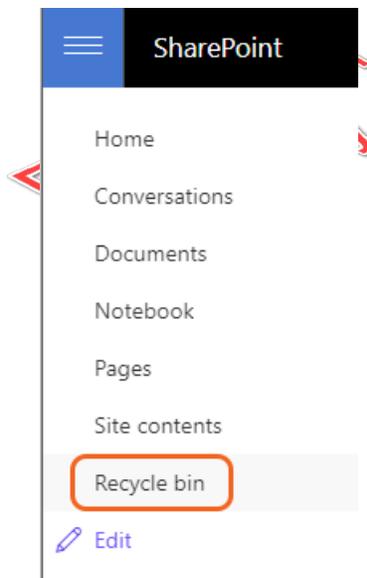
B. Click the ellipsis button next to the title of the item and then click **Delete**.



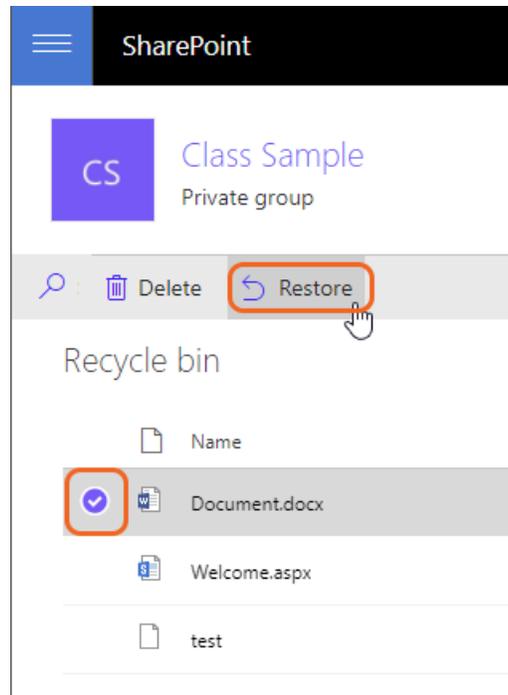
C. Click the **OK** button on the **Message from web page** dialog window asking you to verify sending the item to the recycle bin.



- D. Verify that the **Document** has been removed from the **My Docs** library.
2. Recover the deleted **Document** from the **Recycle Bin**.
- A. Click the **Recycle Bin** link at the bottom of the **Quick Launch** menu.



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



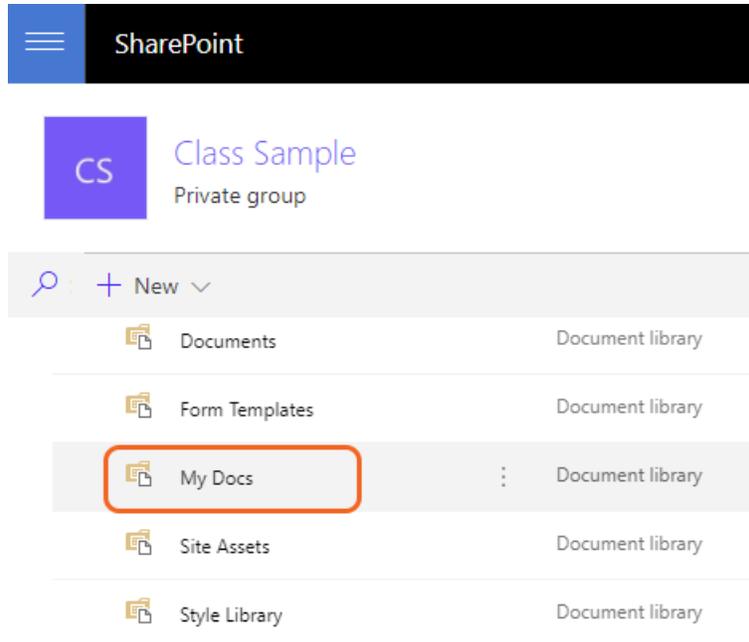
- C. Verify that **Document.docx** is back in the library.

❖ 4.3.3. Versioning

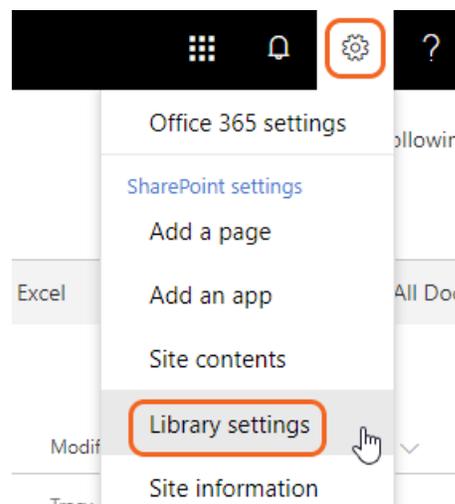
Versioning can be optionally configured in SharePoint so that backup copies of any library list item are automatically created when new changes are applied. This provides the ability for users and administrators to revert to previous versions of items. With libraries you have the additional option of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

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

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



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



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

EDIT LINKS

My Docs ▸ Settings

List Information

Name: My Docs
Web Address: https://webucator.sha
Description:

General Settings

- [List name, description and navigation](#)
- [Versioning settings](#)
- [Advanced settings](#)
- [Validation settings](#)
- [Column default value settings](#)

- D. In the **Version Settings** page, click the **Create major and minor (draft) versions** option. Click the **Yes** option for the **Require content approval for submitted items** setting. Click the **OK** button to save the changes.

EDIT LINKS

Settings ▸ Versioning Settings

Content Approval

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

Require content approval for submitted items?

- Yes No

Document Version History

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

Create a version each time you edit a file in this document library?

- No versioning
 Create major versions
Example: 1, 2, 3, 4

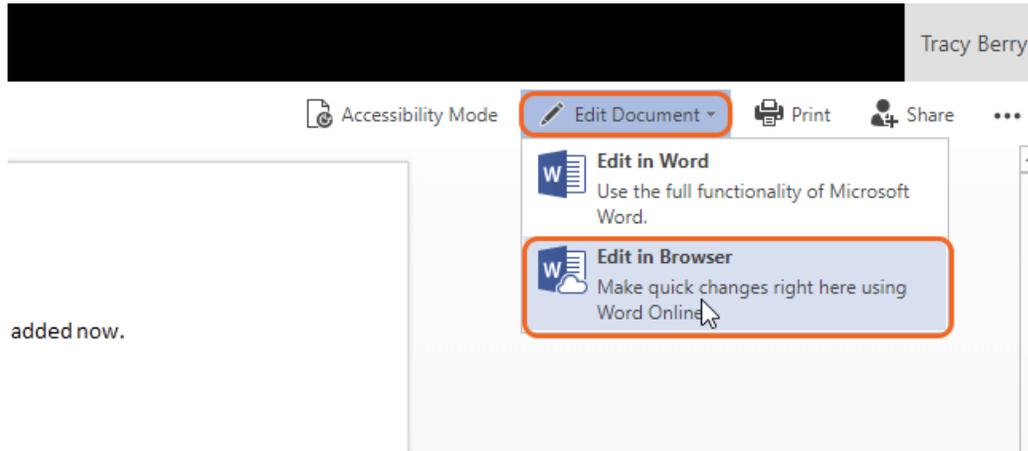
Create major and minor (draft) versions
Example: 1.0, 1.1, 1.2, 2.0

Optionally limit the number of versions to retain:

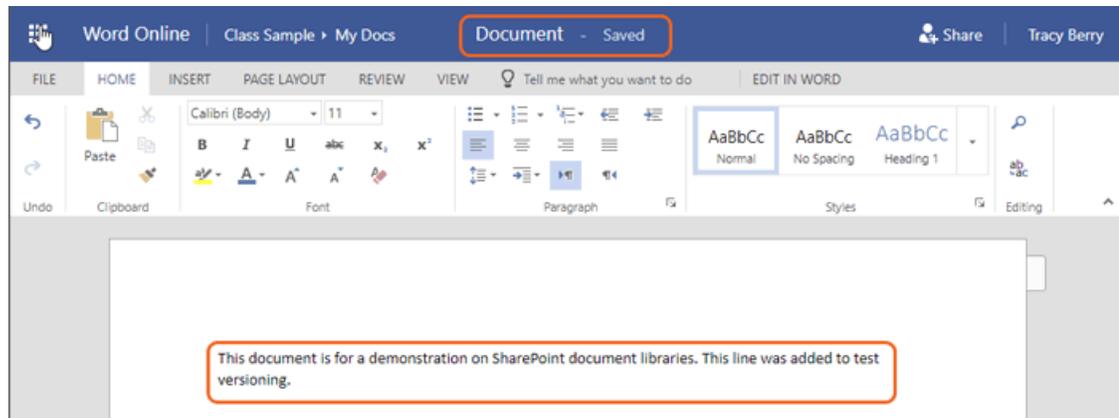
- Keep the following number of major versions:

500

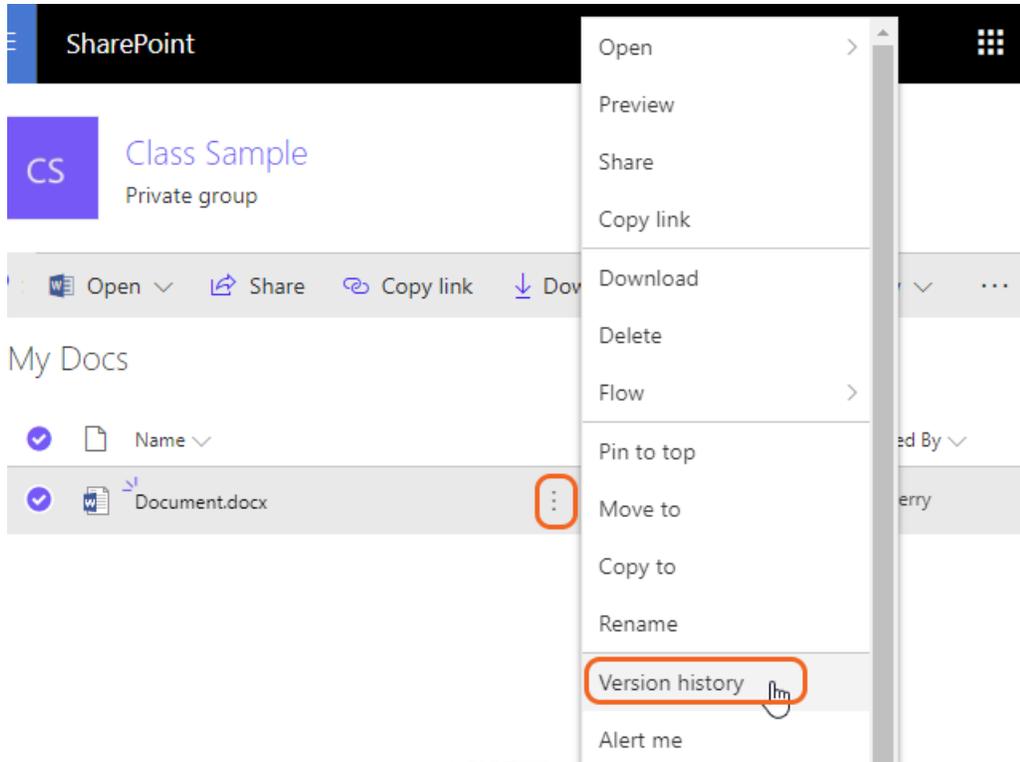
- E. Click the **My Docs** link in the breadcrumbs to navigate back to the **browse** view of the library.
2. Edit the **Document** to test versioning settings.
- A. Click the **Document** link in the **My Docs** library to open the file in Microsoft Word Online for editing, Choose **Edit in Browser**.



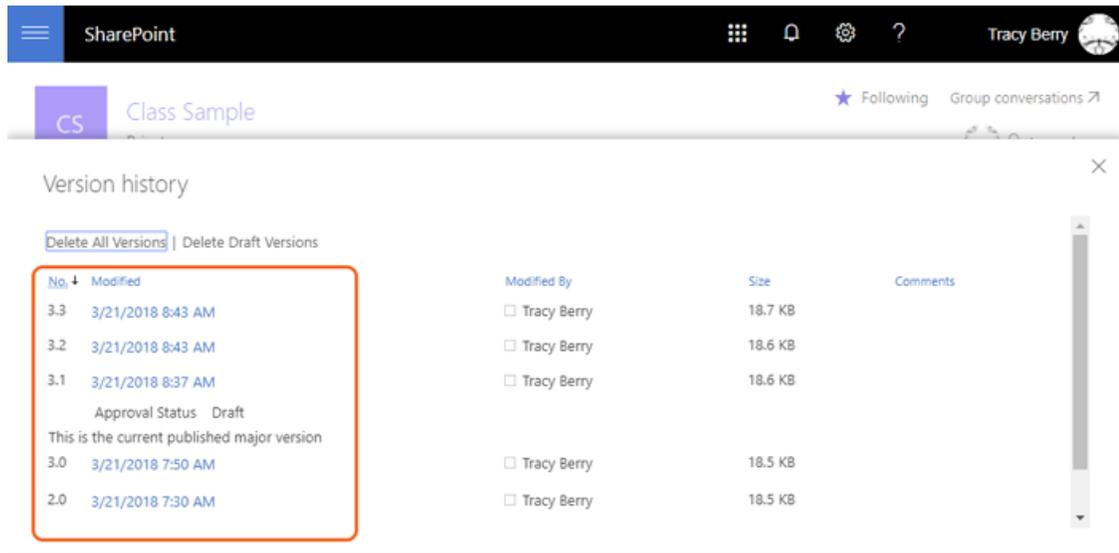
- B. Add a new line to the document in Microsoft Word and type the following: "This line was added to test versioning."



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



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



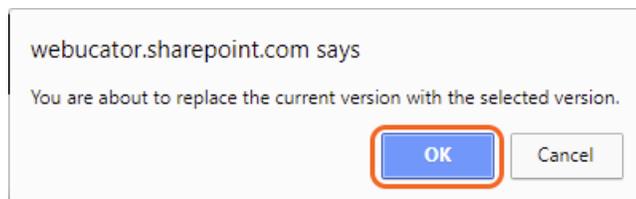
- C. Select **Restore** from a previous version menu.

Version history

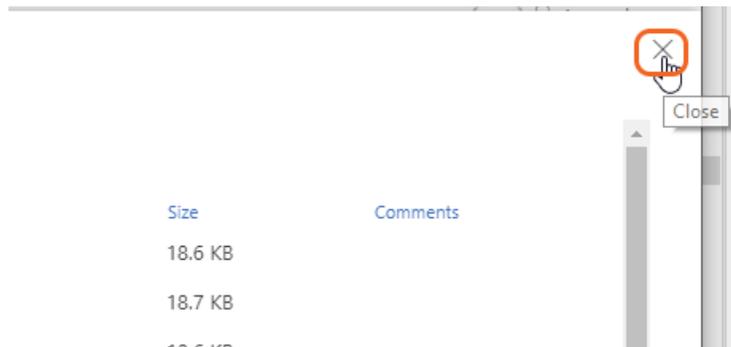
Delete All Versions | Delete Draft Versions

No. ↓	Modified
3.3	3/21/2018 8:43 AM
3.2	3/21/2018 7:50 AM
3.1	3/21/2018 7:30 AM
This is	Delete major version
3.0	3/21/2018 7:50 AM
2.0	3/21/2018 7:30 AM

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



- E. Close the **Version History** dialog.



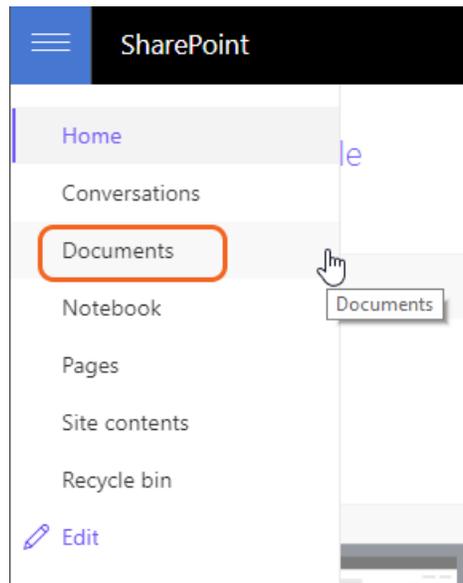
- F. Click the **Document** link in the **My Docs** library to open the file in Microsoft Word Online.
- G. Verify that the changes made earlier are not in this version of the document.

Exercise 4: Working with Team Site Libraries

 5 to 10 minutes

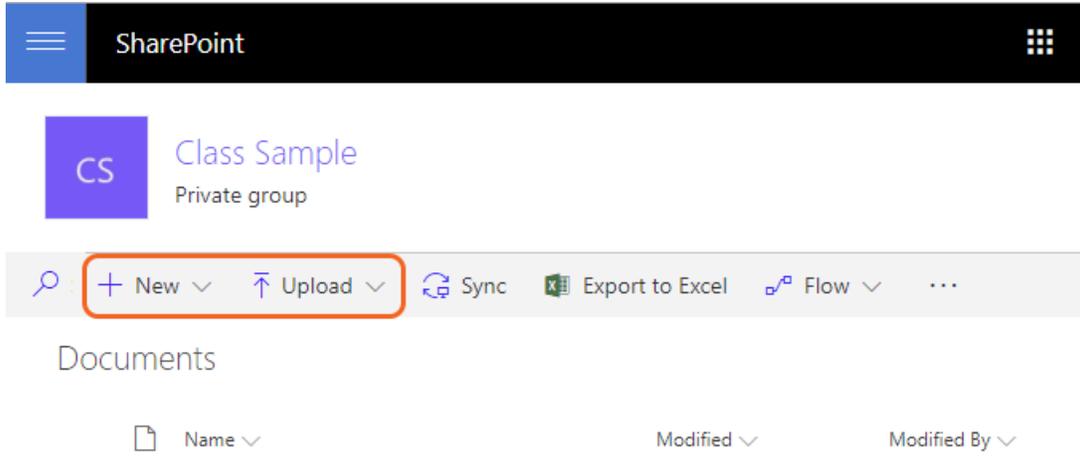
In this exercise, you will work with the default Team Site libraries.

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

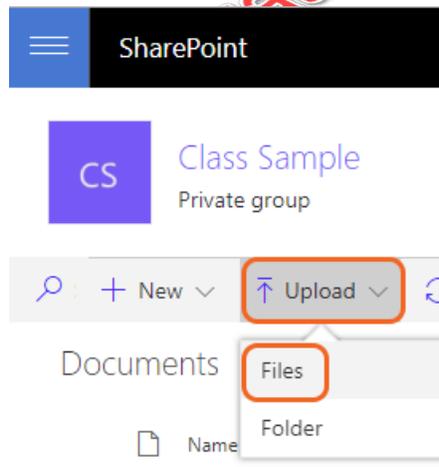


This should take you to the default view of the library.

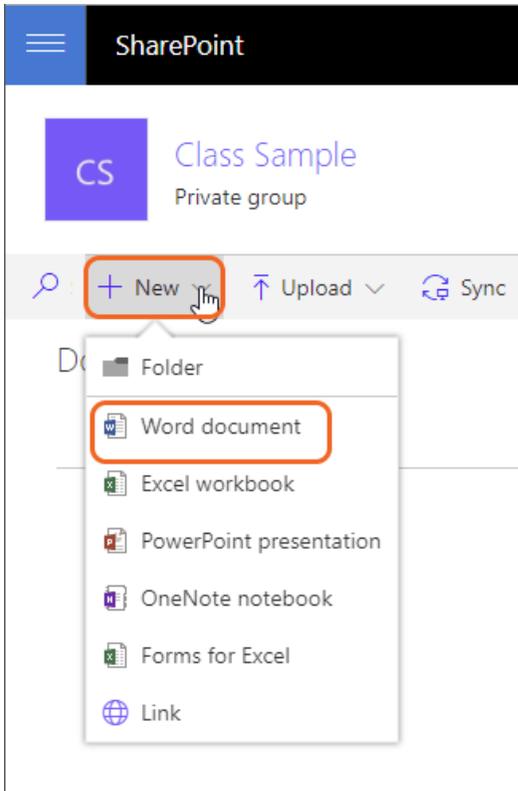
- B. Note how this library view has added options.



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



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



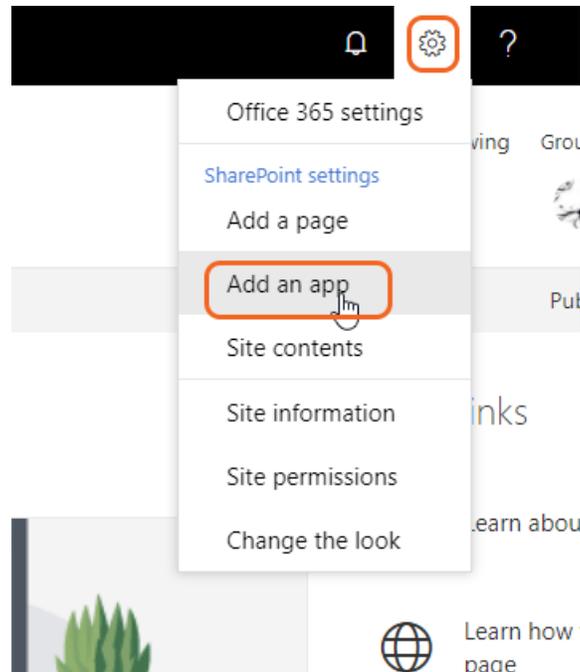
- B. Microsoft Word Online should open to a blank page. Enter the following text into the document: "SharePoint 365 is a great collaboration product." The page will save automatically.
- C. Close Microsoft Word Online and note the new document in the library. You may need to refresh the page if you don't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

Exercise 5: Creating Libraries

🕒 5 to 10 minutes

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

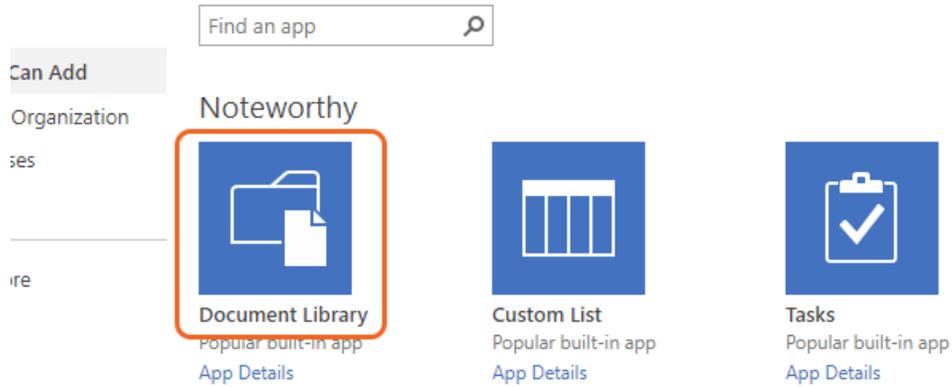
1. Create a new library using the Document Library template.
 - A. Click the **Settings** menu and then choose the **Add an app** menu item.



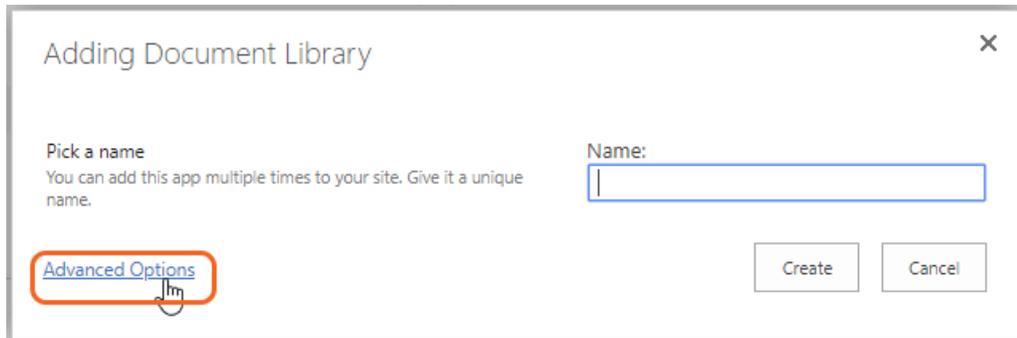
- B. Click the **Document Library** template.

EDIT LINKS

Site contents › Your Apps



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



- D. In the **New** form that opens enter “Expense Report” in the **Name** field, choose **No** for the **Document Version History** and click **Create**.

Name and Description

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

Name:

Expense Report

Description:

Document Version History

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

Create a version each time you edit a file in this document library?

Yes

No

Document Template

Select a document template to determine the default for all new files created in this document library.

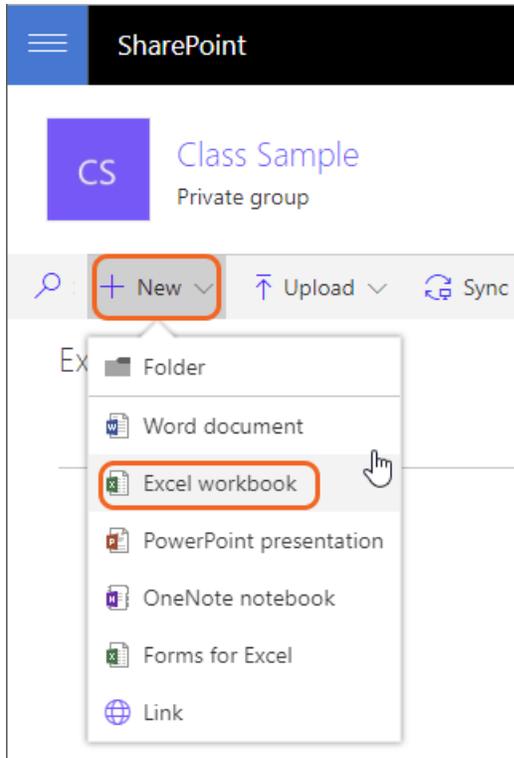
Document Template:

Microsoft Word document

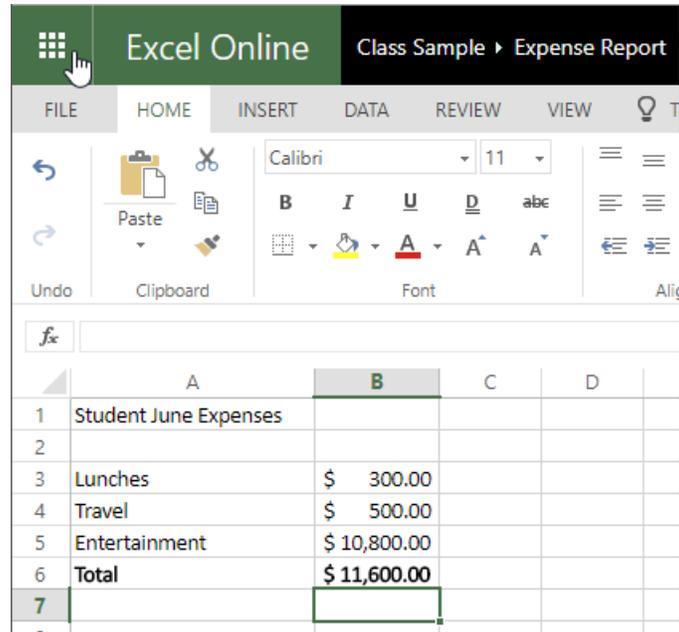
Create

Cancel

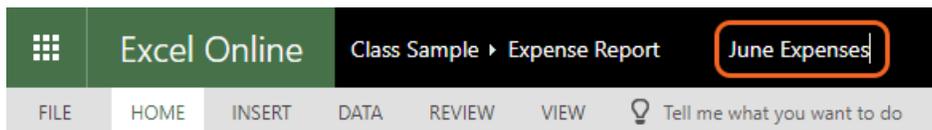
2. Create a new item in the new **Expense Reports** document library.
 - A. Make sure **Expense Reports** is selected in the **Site Contents** menu. Click the **New** button and choose **Excel workbook**.



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



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



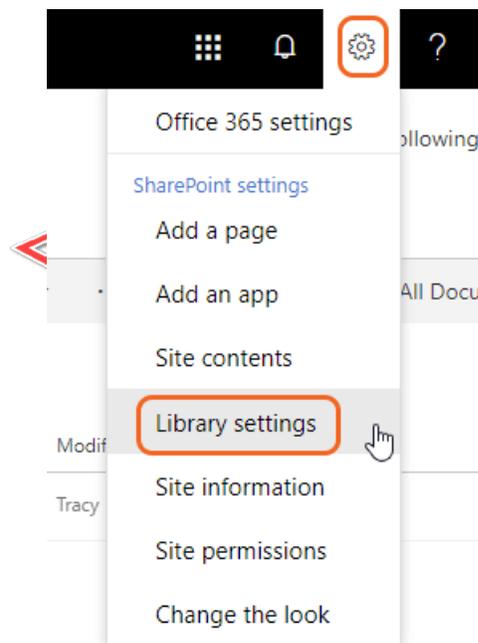
- F. Close the Microsoft Excel window. You should see your new document listed in the library, if you don't click the **Expense Reports** link in the **Quick Launch** menu to refresh the page.

Exercise 6: Document Versioning

 15 to 25 minutes

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

1. Enable versioning on the **Expense Report** library.
 - A. Make sure **Expense Report** is selected. Click the **Library Settings** on the **Settings** to open the lists options.



- B. Click the **Versioning settings** link within the **General Settings** group.
 - C. Take a moment to read through the **Versioning Settings** options. Select the option to **Create major versions** and click the **OK** button to save your changes.

s ▸ Versioning Settings

Content Approval

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

Require content approval for submitted items?

Yes No

Document Version History

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

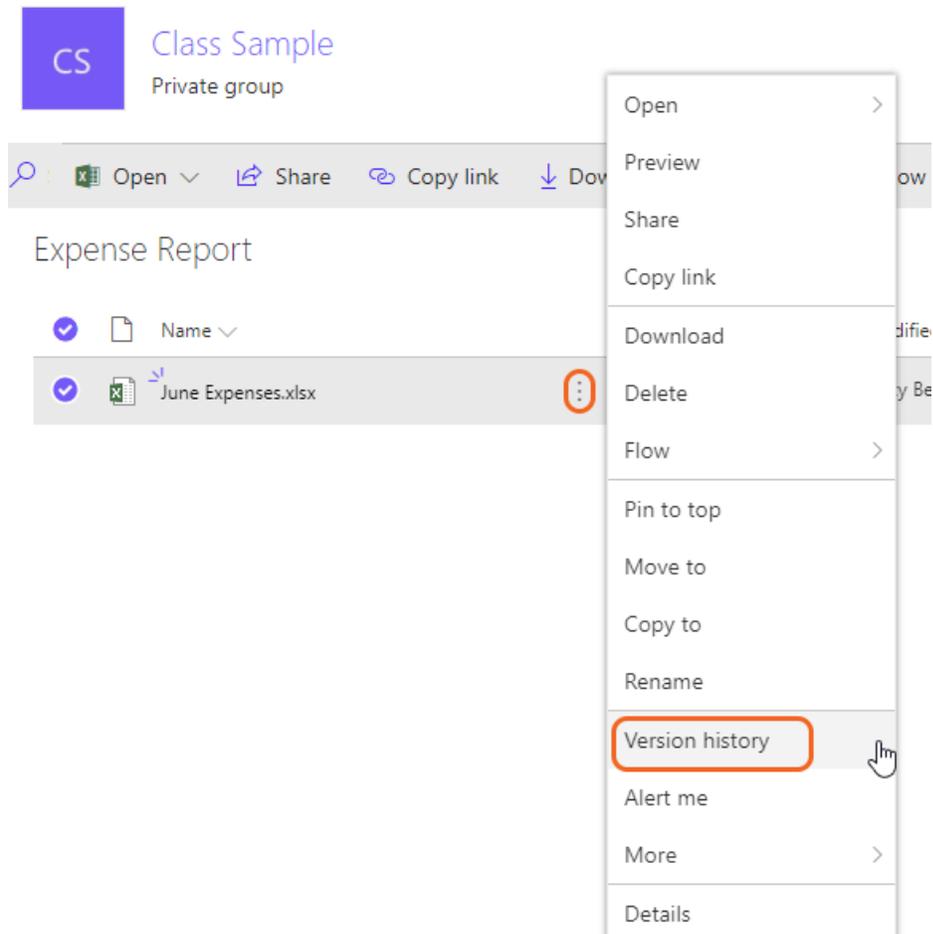
Create a version each time you edit a file in this document library?

No versioning
 Create major versions
Example: 1, 2, 3, 4
 Create major and minor (draft) versions
Example: 1.0, 1.1, 1.2, 2.0

- D. Click the **Expense Reports** link in either the **Quick Launch** menu or in the site breadcrumbs to navigate back to the **Browse** view of the library.
2. Edit a document in the library so that the changes will be stored with a new version of the document.
 - A. Click the “June Expenses” document link in your **Expense Reports** library to open it in Microsoft Excel Online for editing.
 - B. Add the following text into any empty cell in the spreadsheet: “This is to test versioning.”

	A	B
1	Student June Expenses	
2	This is to test versioning.	
3	Lunches	\$ 300.00
4	Travel	\$ 500.00
5	Entertainment	\$ 10,800.00
6	Total	\$ 11,600.00
7		

- C. The file is saved. Close Microsoft Excel.
3. View the version history of the document you just edited.
 - A. Click the ellipsis button next to the **June Expenses** item title and then click the second ellipsis in the balloon pop-up.



- B. In the documents context menu, click the **Version History** options to open the **Version History** dialog. Note that you should have at least two versions in the **Version History** dialog.
4. Revert to a previous version of the document.
 - A. Hover over the version 1.0 date column in the **Version History** list and click the arrow that appears next to it to access its options menu.

Version history

Delete All Versions

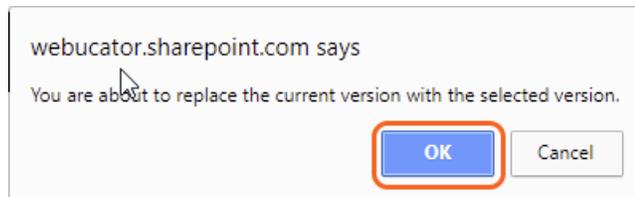
No. ↓ Modified

2.0 3/21/2018 10:40 AM

1.0



- B. From the 1.0 versions options menu, select the **Restore** option.



- C. In the message from web page dialog box, click the **OK** button to replace the current version with the older version.
- D. Note how the **Version History** dialog shows a new third version that is really a copy of the first version.
- E. Close the **Version History** dialog.
- F. Click the link of the spreadsheet you just reverted to open it in Microsoft Excel and verify that it has been restored to its earliest version.
- G. Close Microsoft Excel once you are done verifying the restored document.

Conclusion

In this lesson, you have learned:

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

- How to enable versioning on a library.
- How to revert a library document to an earlier version.

Evaluation
copy

LESSON 5

Working with Lists and Library Views

Topics Covered

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

Introduction

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



5.1. Default Views

❖ 5.1.1. Explore Default Views

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

1. The first thing to do is create a couple of items in the **Tasks** list in order to have something to display in the views.
 - A. Click the **Tasks** link on the **Site Contents**.
 - B. Click the **new item** link in the list to open the **Tasks - New Item** form and click the **SHOW MORE** link. Use the following table for information to fill in the form:

Task 1

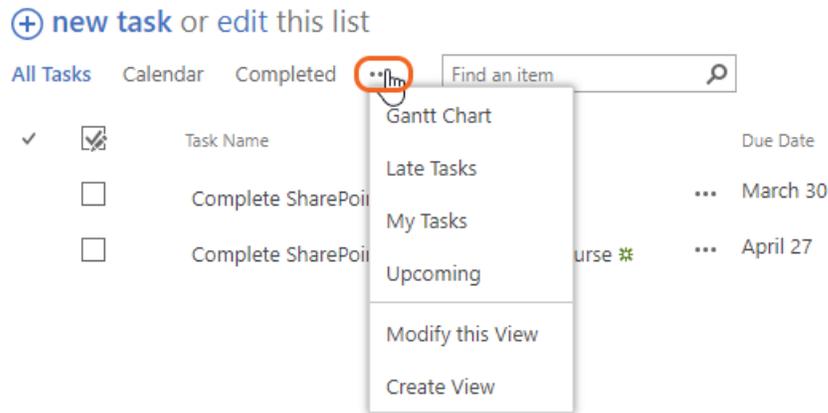
Field	Data
Title:	Type "Complete SharePoint End User course"
Priority:	Select (2) Normal
Status:	Select In Progress
% Complete	Type "50"
Assigned To:	Enter the SharePoint account you are currently logged in with
Description:	Type "SharePoint 2016 End User 3 day course"
Start Date:	Select (Date course started)
Due Date:	Select (Date course ends)

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

Task 2

Field	Data
Title:	Type "Complete SharePoint 2016 Power User Course"
Priority:	Select (2) Normal
Status:	Select Not Started
% Complete	Type "0"
Assigned To:	Enter the SharePoint account you are currently logged in with
Description:	Type "SharePoint Power User 2 day course"
Start Date:	Select (1 month from current date)
Due Date:	Select (1 day from Start Date)

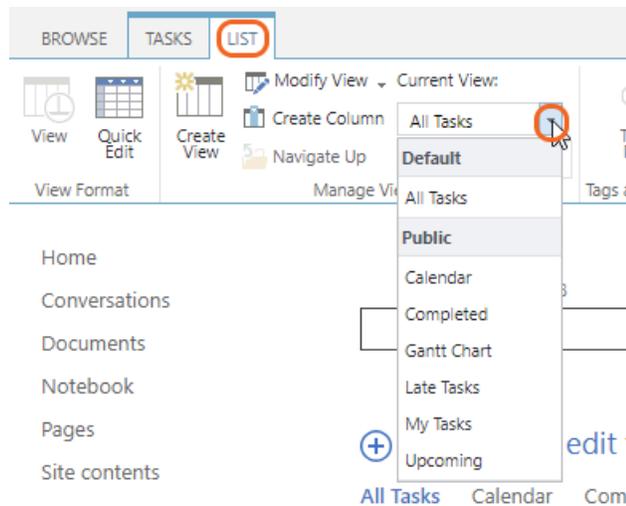
2. Explore the ways to navigate to views in a list or library.
 - A. Select the desired view from the links along the top of the list or additional views available by clicking the ellipsis button.



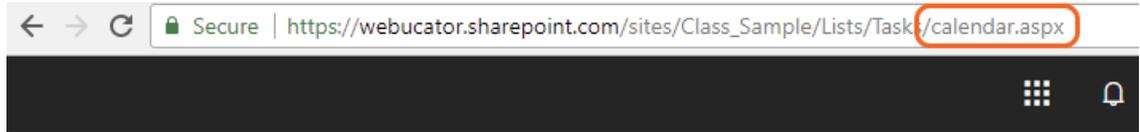
Security-Trimmed Views

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.

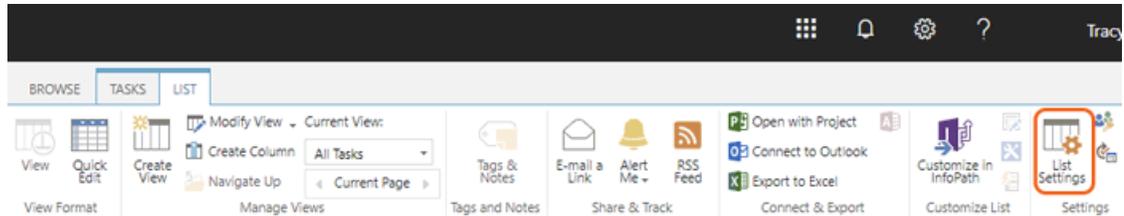
- B. Select the view from the drop-down list on the **List** tab toolbar within the **Manage Views** region.



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



3. Manage the views for the **Tasks** list.
 - A. Click the **List** tab for the **Tasks** list to open the toolbar. Click the **List Settings** button on the **List** tab toolbar.



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

Views

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

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

▢ [Create view](#)

- C. Click the **My Tasks** link from within the **Views** region to open the **Edit View** page for **My Tasks**.
 - D. Note the option to **Make this the default view** as well as the view's page name.

Name

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

View Name:

My Tasks

Web address of this view:

https://webucator.sharepoint.com/sites/Class_Sample/Lists/Tasks/

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

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.

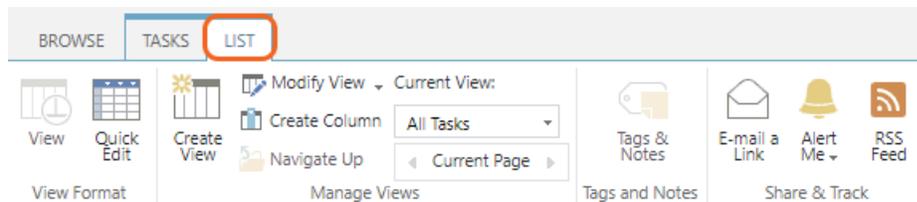
Evaluation
*
Copy

5.2. Custom Views

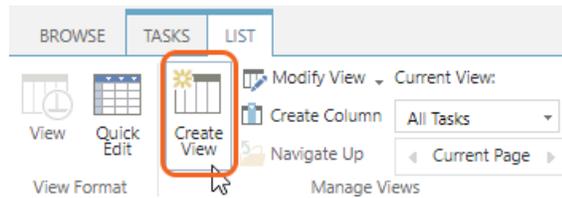
❖ 5.2.1. How to Create a Custom View

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

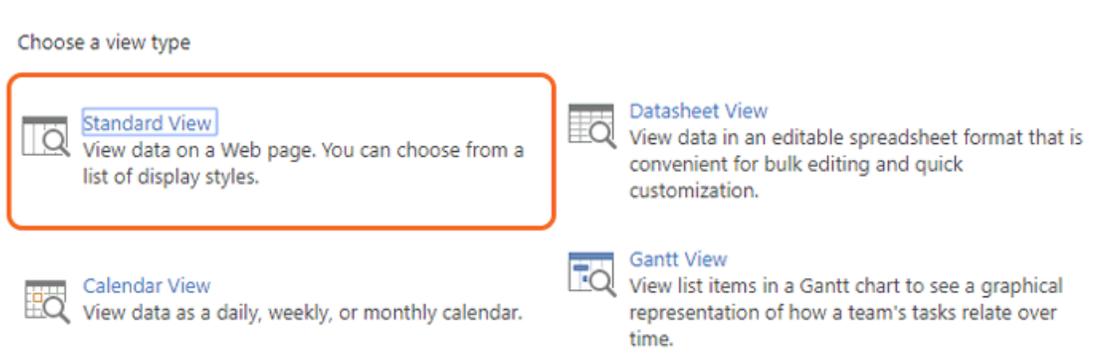
1. Create a custom view of **Tasks** using the **Standard View** format.
 - A. Navigate to the **Tasks** list of the site by clicking the **Tasks** link in the **Quick Launch** menu.
 - B. Click the **List** tab to open the toolbar.



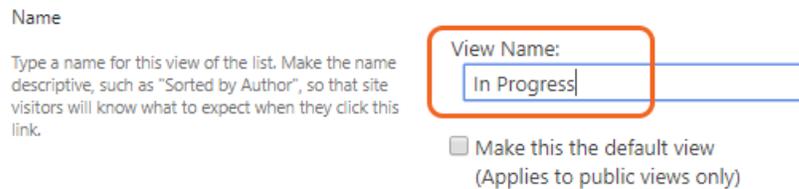
C. Click the **Create View** button on the **List** tab toolbar.



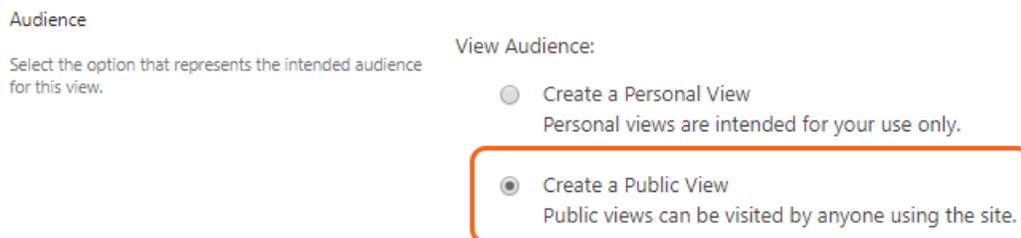
D. Click **Standard View** from the **Choose a view type** region.



E. Type "In Progress" in the **View Name** field.



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



Public Views and Permissions

If a user does not have permission to create a public view, the option is grayed out. In a later exercise, you will create both a personal view and a public view. Permissions are covered in a later part of this course.

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

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

Columns

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

Display	Column Name	Position from Left
<input type="checkbox"/>	Completed	1 ▼
<input checked="" type="checkbox"/>	Task Name (linked to item with edit menu)	2 ▼
<input checked="" type="checkbox"/>	Due Date	3 ▼
<input checked="" type="checkbox"/>	Assigned To	4 ▼
<input type="checkbox"/>	% Complete	5 ▼
<input type="checkbox"/>	App Created By	6 ▼
<input type="checkbox"/>	App Modified By	7 ▼
<input type="checkbox"/>	Completed Items	27 ▼
<input checked="" type="checkbox"/>	Start Date	28 ▼
<input type="checkbox"/>	Task Name	29 ▼
<input type="checkbox"/>	Task Name (linked to item)	30 ▼
<input checked="" type="checkbox"/>	Task Status	31 ▼
<input type="checkbox"/>	Type (icon linked to document)	32 ▼

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

Sort

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

First sort by the column:

Start Date

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

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

Then sort by the column:

None

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

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

Sort only by specified criteria (folders may not appear before items).

- I. Select **Status** for the **Show the items when column** selection under the **Filter** region. Leave the **operator** drop-down set to **is equal to** and type **In Progress** in the **value** field text box.

Filter

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

Show all items in this view

Show items only when the following is true:

Show the items when column

Task Status

is equal to

In Progress

And Or

When column

None

is equal to

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

[Totals](#)
[Style](#)
[Folders](#)
[Item Limit](#)
[Mobile](#)

Adjust mobile settings for this view.

Enable this view for mobile access
 (Applies to public views only)

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

Number of items to display in list view web part for this view:

Field to display in mobile list simple view:

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

- Once the new view has been successfully created, SharePoint will automatically navigate you back to the **Browse** tab with the new view **In Progress** selected. The tasks listed should only include tasks that have their **Status** field set to **In Progress**

[+ new task](#) or [edit this list](#)

[All Tasks](#) [Calendar](#) [In Progress](#) ...

Task Name	Due Date	Assigned To	Start Date	Task Status
Complete Course ✱	...			In Progress
Complete SharePoint End User course	3 days ago	<input type="checkbox"/> Tracy Berry	March 26	In Progress

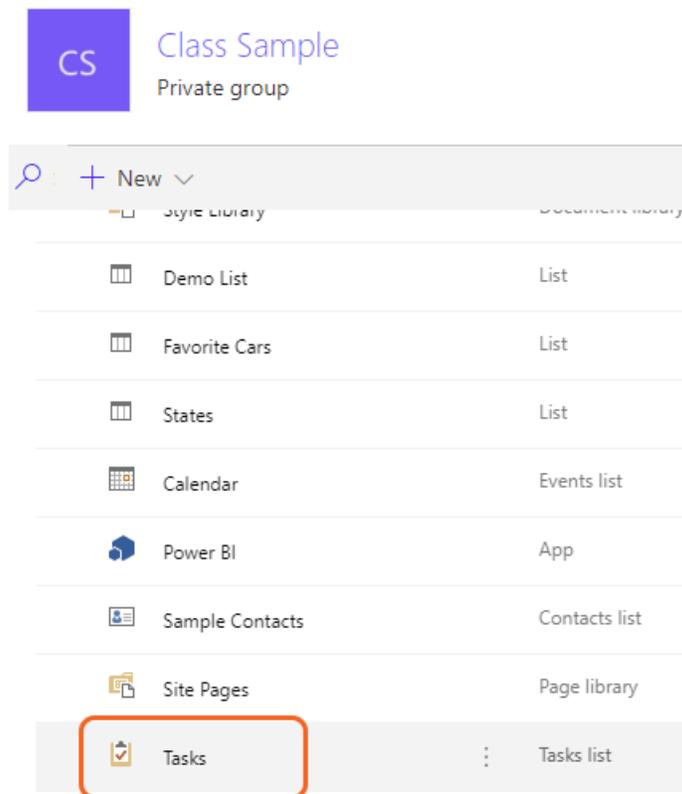
- Click the **Tasks** link in the **Quick Launch** and note how the view is reset back to the default **All Tasks**. You could optionally set the custom view **In Progress** as the default view for the list.

Exercise 7: Working with Views

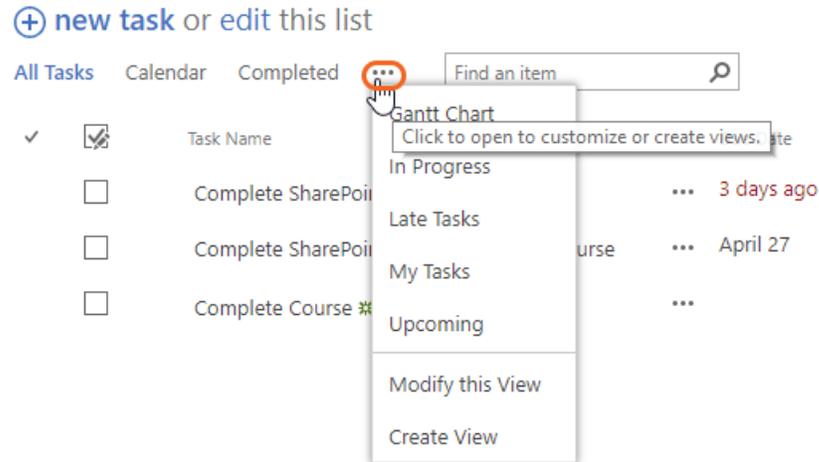
🕒 15 to 25 minutes

In this exercise, you will work with list and library views. You will test the default views that come with list and library templates.

1. Explore the default views of the **Tasks** list.
 - A. Click the **Tasks** link on the **Site Contents**.



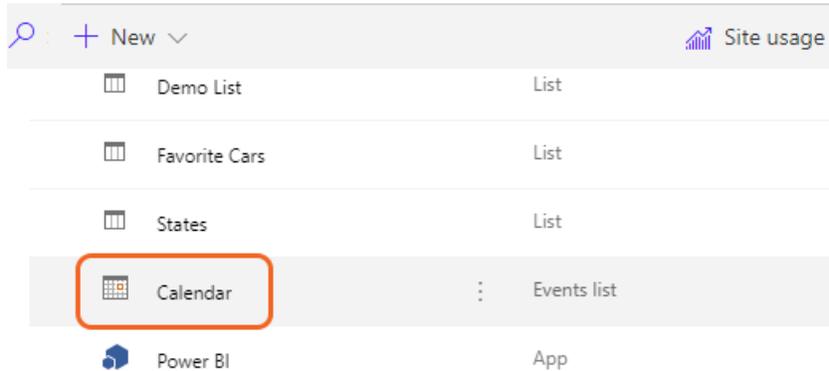
- B. Select the desired view from the links along the top of the list or additional views available by clicking the ellipsis button.



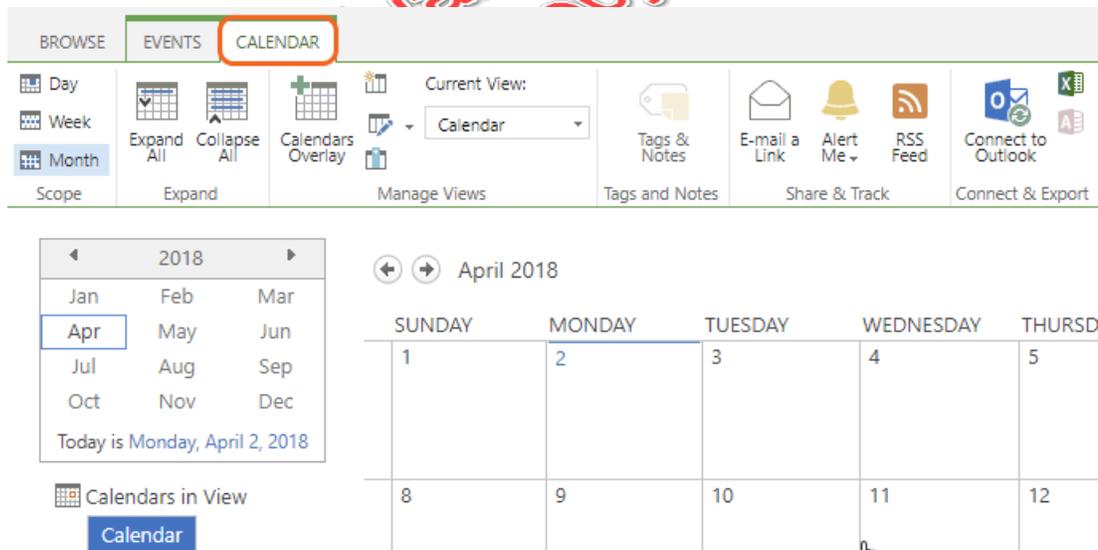
Security-Trimmed Views

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.

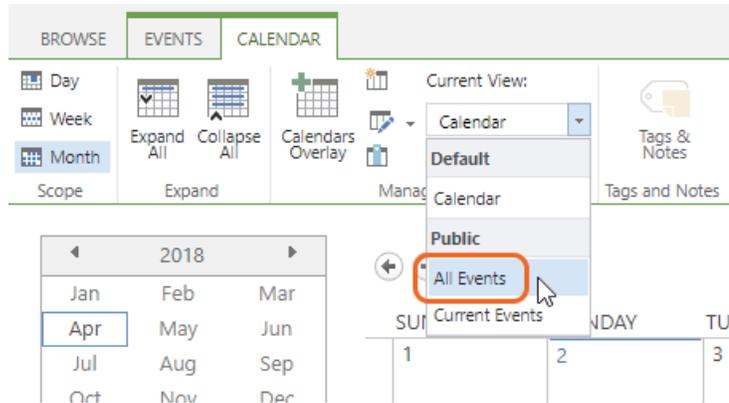
- C. Click the **My Tasks** link from the list views menu. The **Tasks** list will now be filtered to show only tasks that are assigned to you.
 - D. Take a few minutes to click each of the different views available in the **Tasks** list.
2. Explore the default views of the **Calendar** list.
 - A. Click the **Calendar** link on the **Site Contents**.



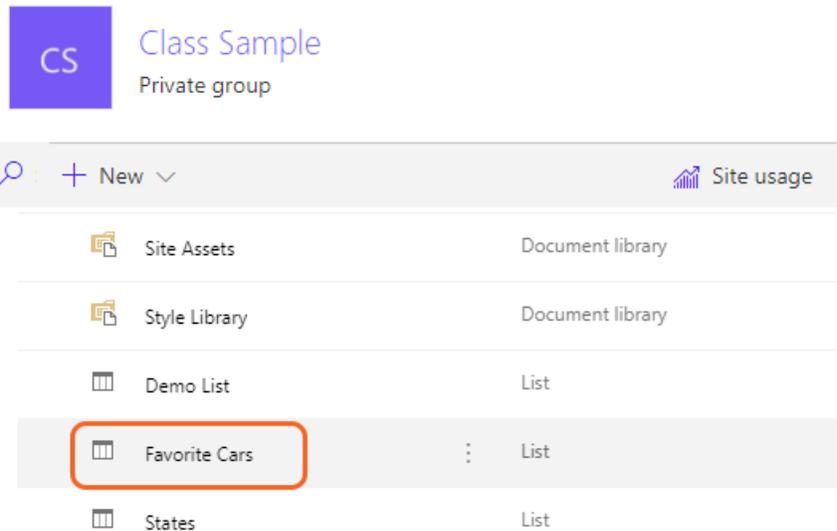
B. The calendar list does not display the views from the main **Calendar** view. To choose alternate views, click the **Calendar** tab to open the toolbar.



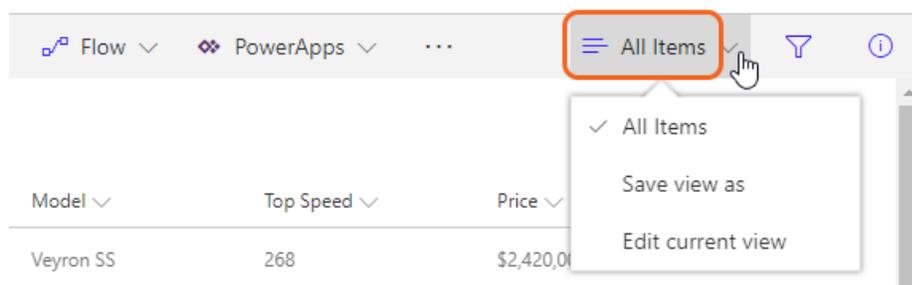
C. Click the **All Events** link from the list views menu.



- D. The **Calendar** list will now display all events in a more traditional list-like table view.
 - E. Take a few minutes to click each of the different views available in the **Calendar** list.
3. Explore the default view of the custom **Favorite Cars** list.
- A. Click the **Favorite Cars** link on the **Site Contents**.



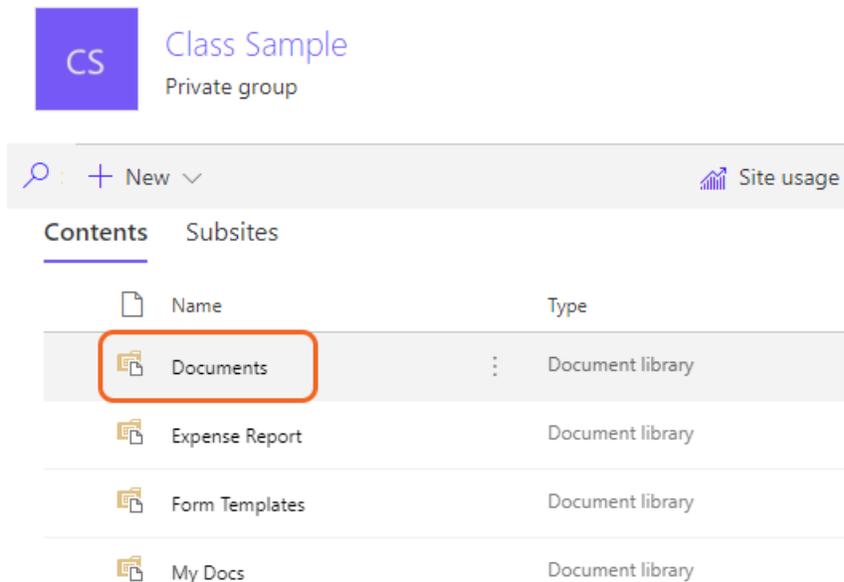
- B. Click the button next to the **All Items** link to open the **Favorite Cars** list views menu.



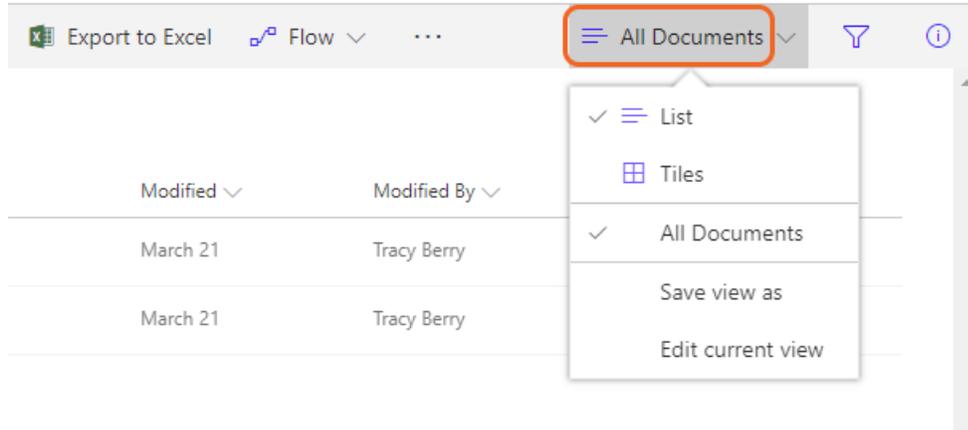
Alternative Approach

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

- C. Note that the current view, **All Items** is the only view created by default for lists based on the **Custom List** template.
- 4. Explore the default view of the **Documents** library.
 - A. Click the **Documents** link on the **Site Contents**.



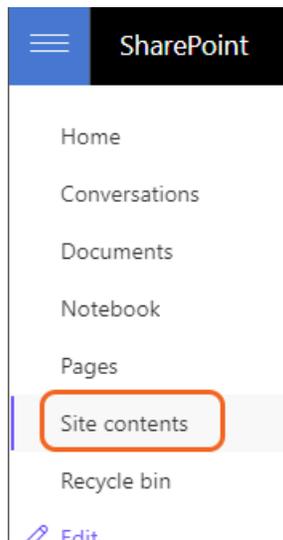
- B. Click the button next to the **All Documents** link to open the **Documents** library views menu.



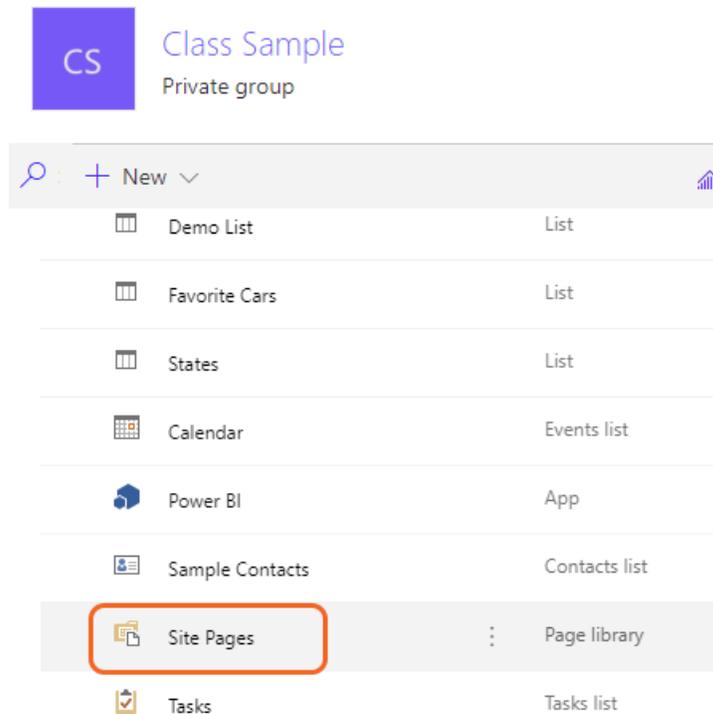
Alternative Approach

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

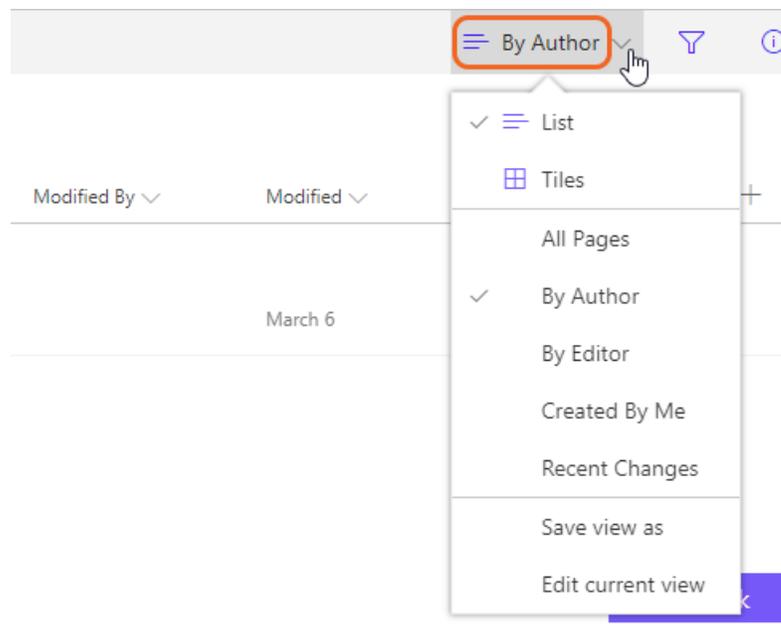
- C. Note that the current view, **All Documents** is the only view created by default for libraries based on the **Document Library** template.
- 5. Explore the default views of the **Pages** library.
 - A. The **Site Pages** library link is not listed on the **Quick Launch** menu by default. To get to **Site Pages**, click the **Site Contents** link first.



- B. From the **Site Contents** page, click the **Site Pages** link.



- C. Click the button next to **By Author** to open the **Site Pages** library views menu.



Alternative Approach

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

- D. Click the **Created By Me** link from the library views menu. The **Site Pages** list will now display only pages that the account you are logged in with has created or modified.

Empty Filtered View

Since you have probably not yet created or modified any of the pages in the **Site Pages** library, the filtered view will be empty. Later in the course, you will be creating and modifying in the **Site Pages** library.

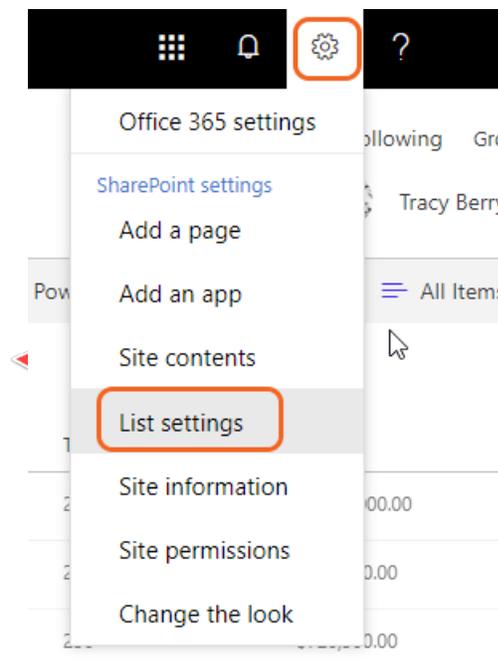
- E. Take a few minutes to click each of the different views available in the **Site Pages** library.

Exercise 8: Creating Public and Personal Views

🕒 15 to 25 minutes

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

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



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

Views

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

View (click to edit)	Default View	Mobile View	Default Mobile View
All Items	✓	✓	✓

[Create view](#)

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

Choose a view type

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

Datasheet View
View data in an editable spreadsheet format that is convenient for bulk editing and quick customization.

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

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

E. Enter “Really Fast” in the **View Name** field and leave the **View Audience** field set to **Create a Public View**.

Name

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

View Name:
Really Fast

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

Audience

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

View Audience:

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

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

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

- **Make**
- **Model**
- **Top Speed**

Columns

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

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Make (linked to item with edit menu)	1 ▼
<input checked="" type="checkbox"/>	Model	2 ▼
<input checked="" type="checkbox"/>	Top Speed	3 ▼
<input type="checkbox"/>	Price	4 ▼

- G. In the **Filter** section, choose the **Top Speed** column in the **Column to Filter** drop-down list. Select **is greater than** in the **operator** drop-down field. Enter “250” in the **Value** field.

Filter

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

Show all items in this view

Show items only when the following is true:

Show the items when column

Top Speed

is greater than

250

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

Group By

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

First group by the column:

Top Speed

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

Then group by the column:

None

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

By default, show groupings:

- Collapsed Expanded

- 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 **Really Fast** is selected and shaded blue in the view choices. The list of course is also filtered to only show cars with top

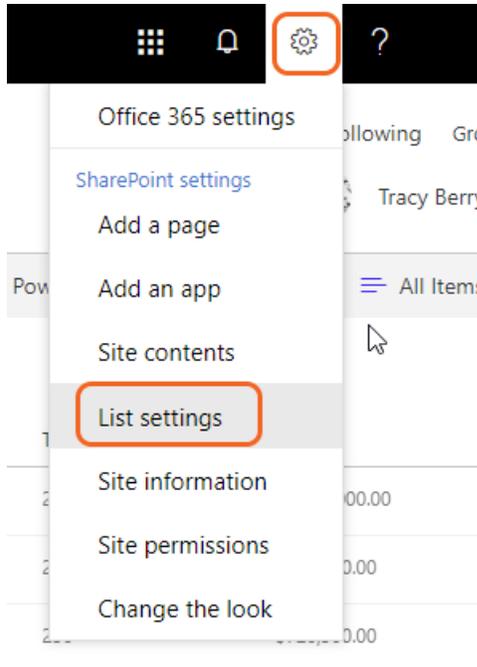
speeds faster than 250 and is grouped by **Top Speed**. The groups are expandable but because of the small sampling of cars there is only a single car in each group.

The screenshot shows a Microsoft Dynamics 365 interface for a 'Class Sample' private group. The main content area displays a list view titled 'Favorite Cars'. The list is grouped by 'Top Speed' and contains two expandable groups:

- Top Speed: 268 (1)
 - Make: Bugatti, Model: Veyron SS, Top Speed: 268
- Top Speed: 257 (1)
 - Make: SSC, Model: Ultimate AeroTT, Top Speed: 257

The interface includes a top navigation bar with options like '+ New', 'Export to Excel', 'Flow', and 'PowerApps'. The list view has columns for 'Make', 'Model', and 'Top Speed'.

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



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



Views

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

View (click to edit)	Default View	Mobile View	Default Mobile View
All Items	✓	✓	✓

[Create view](#)

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

Choose a view type



Standard View

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



Datasheet View

View data in an editable spreadsheet format that is convenient for bulk editing and quick customization.



Calendar View

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



Gantt View

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

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

- E. Enter “Really Expensive Cars” in the **View Name** field and change the **View Audience** field set to **Create a Personal View**.

Name

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

View Name:

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

Audience

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

View Audience:

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

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

- F. In the **Columns** section of the **Create View** form only select the following columns:
- A. **Make**
 - B. **Model**
 - C. **Price**

Columns

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

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Make (linked to item with edit menu)	1 ▼
<input checked="" type="checkbox"/>	Model	2 ▼
<input type="checkbox"/>	Top Speed	3 ▼
<input checked="" type="checkbox"/>	Price	4 ▼
<input type="checkbox"/>	App Created By	5 ▼
<input type="checkbox"/>	App Modified By	6 ▼

- A. In the **Filter** section, choose the **Price** column in the **Column to Filter** drop-down list. Choose **is greater than or equal to** in the **operator** drop-down field. Enter “1,000,000” (one million) in the **Value** field.

Filter

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

Show all items in this view

Show items only when the following is true:

Show the items when column

Price ▼

is greater than or equal to ▼

1000000

And Or

When column

- B. Click the **OK** button to save the new view and see the results.
- C. Note how the new view **Really Expensive Cars** is selected. The list is filtered to only show with prices greater than or equal to one million and only available to you as it is personal.

🔍 : + New ✎ Quick edit 📄 Export to Excel 🔄 Flow ▾ ...

Favorite Cars

Make ▼	Model ▼	Price ▼
Bugatti	Veyron SS	\$2,420,000.00
McLaren	F1	\$1,100,000.00

Conclusion

In this lesson, you have learned:

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

LESSON 6

Working with Sites

Topics Covered

- Site Templates.
- “Out-of-the-Box” Site Templates.
- Creating a new site using Site Templates.
- Creating a Project site.
- Creating a Team site.
- Creating a Blog site.
- Managing the sites listed in the top link bar.

Introduction

Evaluation Copy

All SharePoint content is accessed through a site. A SharePoint site is the container for lists and libraries and provides a starting point for basic administration. The content, lists, libraries, and basic look and feel of a site is initially determined by the Site Template used to create the site.



6.1. Site Templates

The version of SharePoint determines the initial list of site templates available to create new sites. The following is a list of child site templates available from a Team Site created in SharePoint 365.

- Team Site
- Blog
- Project Site

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

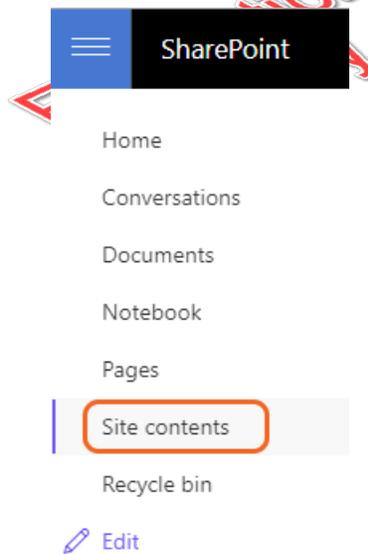


6.2. Creating Sites

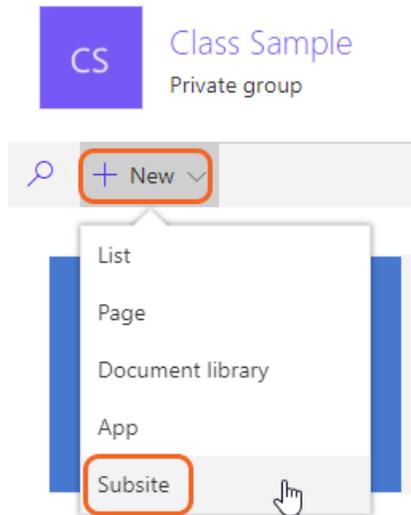
❖ 6.2.1. Creating a Team Site

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

1. Create a new child site named “Marketing” using the **Team Site** template.
 - A. Click the **Site Contents** link in the **Settings** menu.



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



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

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

Title and Description

Title:

Description:

Web Site Address

URL name:
https://webucator.sharepoint.com/sites/Class_Sample/

Template Selection

Select a language:

Select a template:
Collaboration Enterprise Duet Enterprise

Blog
Project Site

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

Permissions

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

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

User Permissions:

Use same permissions as parent site
 Use unique permissions

Navigation

 Display this site on the Quick Launch of the parent site?
 Yes No

 Display this site on the top link bar of the parent site?
 Yes No

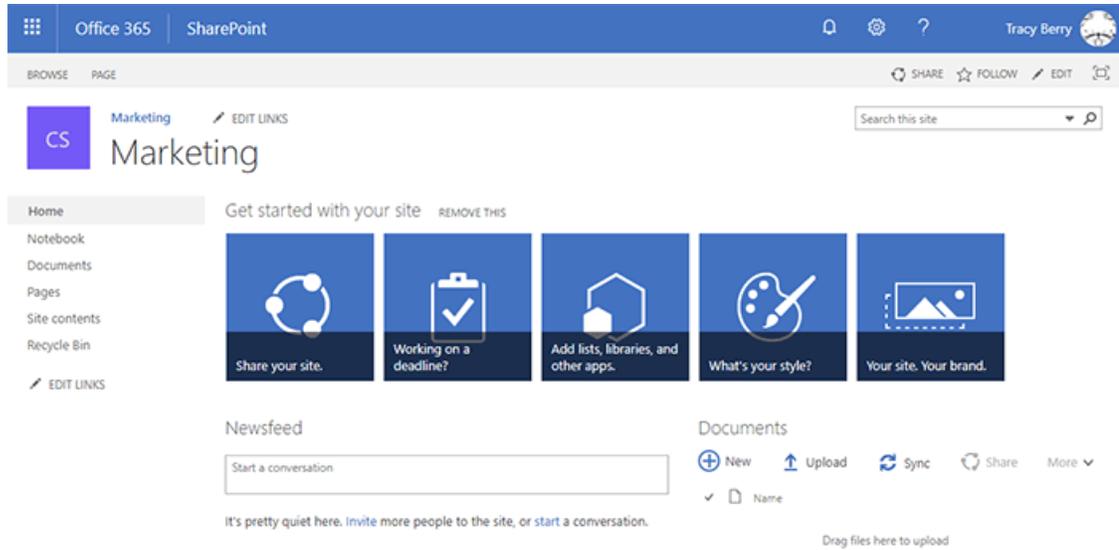
Navigation Inheritance

 Use the top link bar from the parent site?
 Yes No

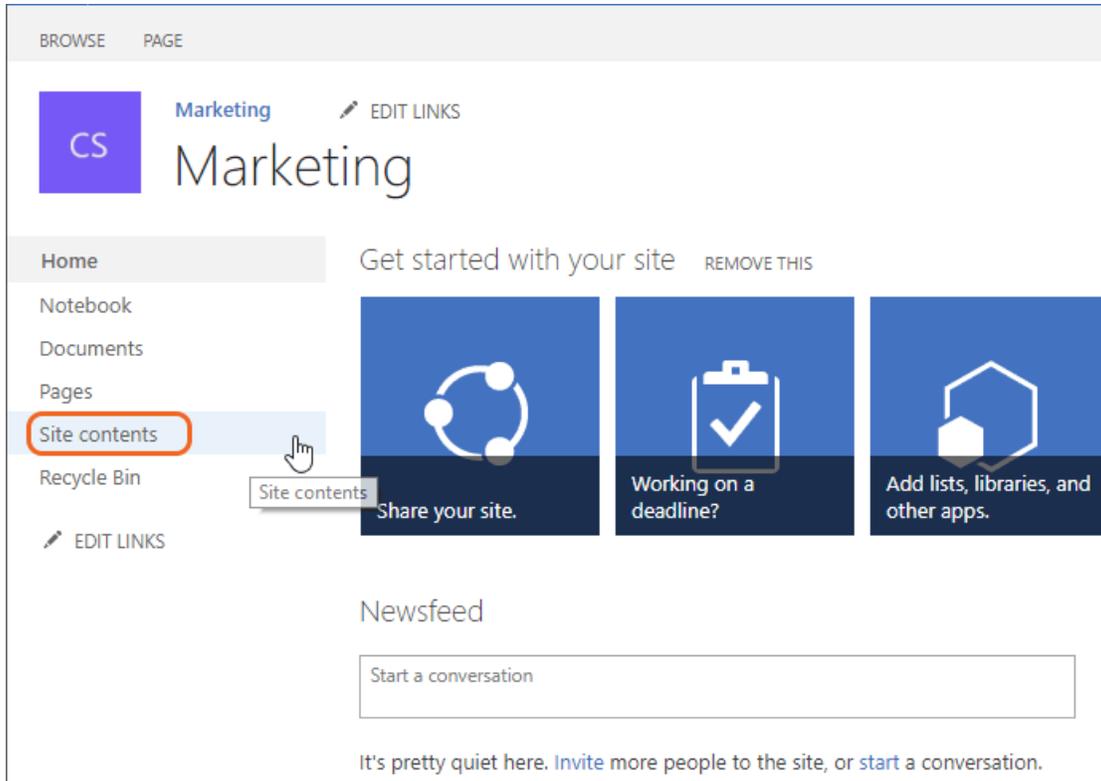
Navigation Settings

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.



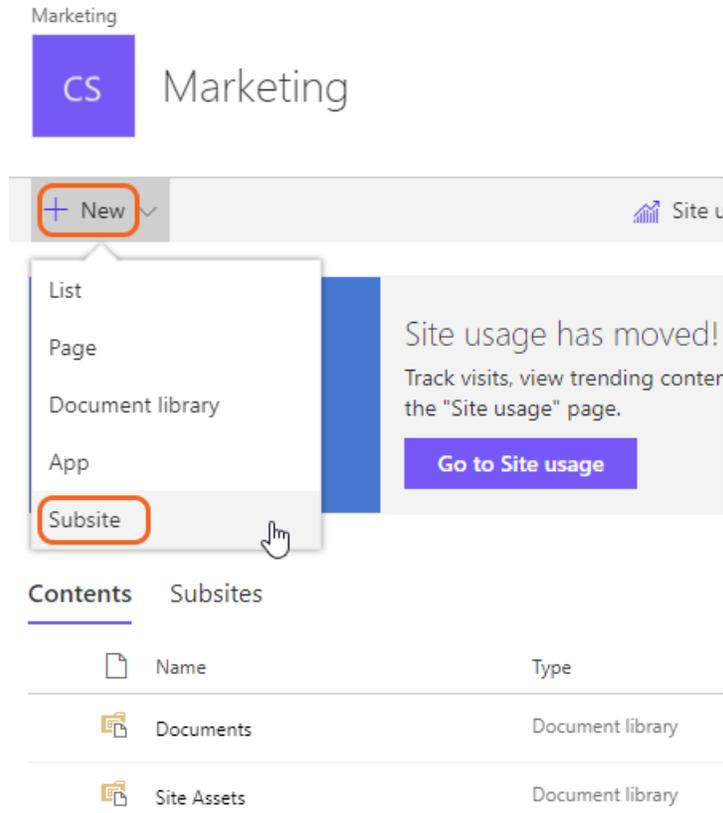
2. View the lists and libraries that come with the **Team Site** template.
 - A. In the **Marketing** site, click the **Site Contents** link in the **Quick Launch** menu.



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

Contents		Subsites	
	Name	Type	Items
	Documents	Document library	0
	Site Assets	Document library	1
	MicroFeed	List	2
	Power BI	App	
	Site Pages	Page library	2

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

Title and Description

Title:

Description:

Web Site Address

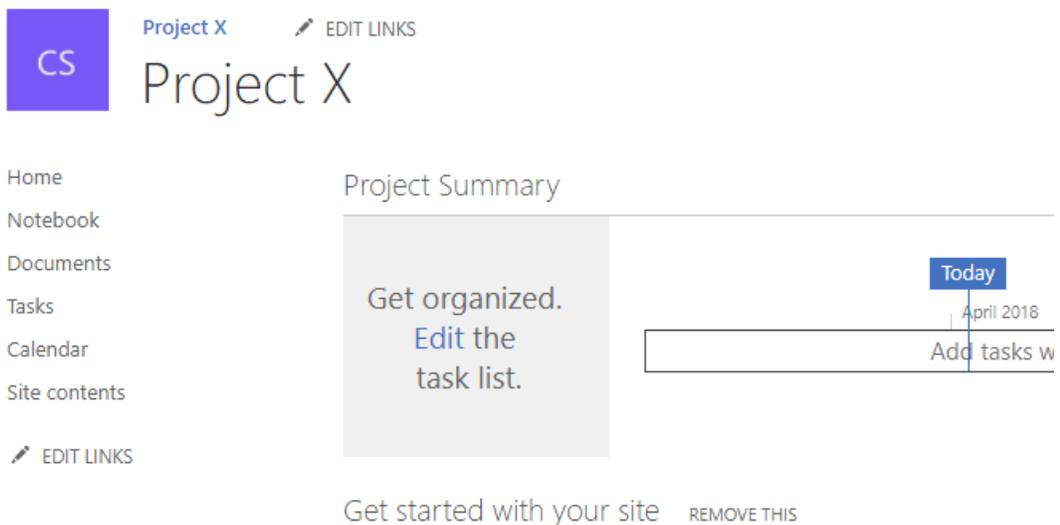
URL name:

Template Selection

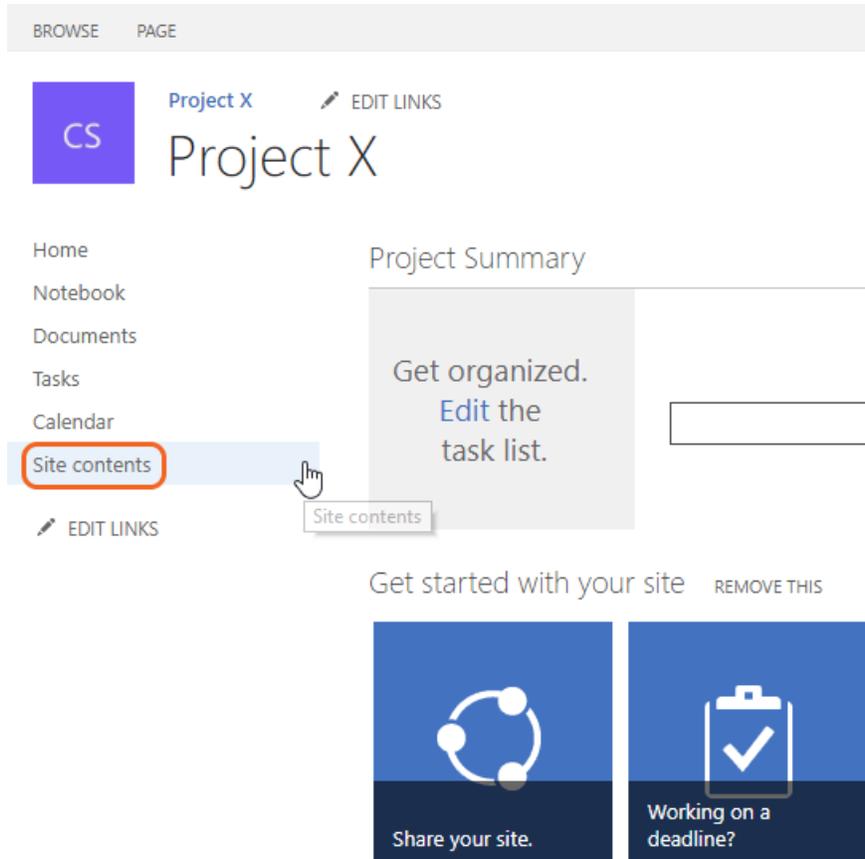
Select a language:

Select a template:
Collaboration Enterprise Duet Enterprise
Team site (classic experience)
Blog
Project Site

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



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



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

Contents		Subsites	
	Name	Type	Items
	Documents	Document library	0
	Site Assets	Document library	1
	Calendar	Events list	0
	MicroFeed	List	2
	Power BI	App	
	Tasks	Tasks list	0

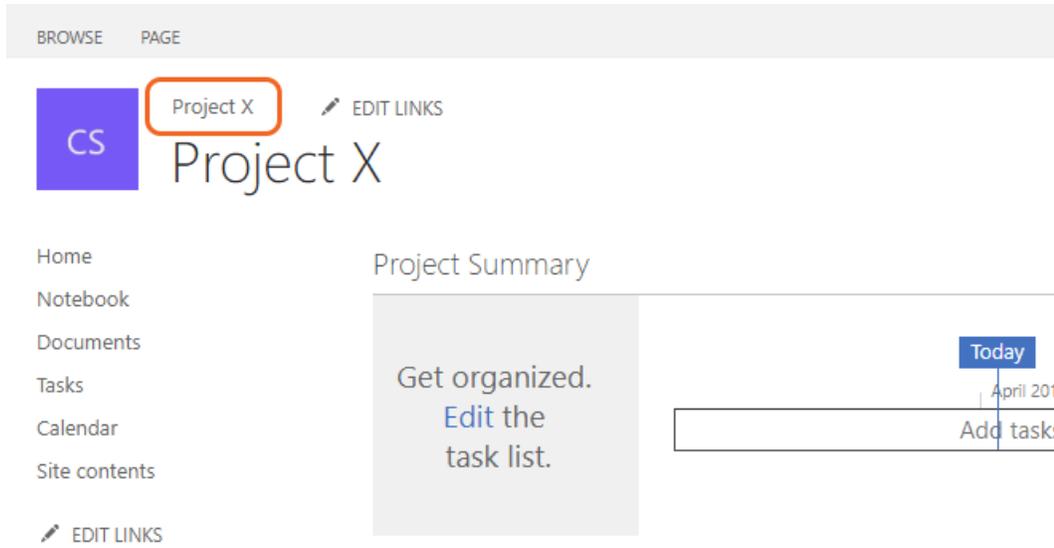
Evaluation Copy

6.3. Site Navigation

❖ 6.3.1. Managing Site Navigation

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

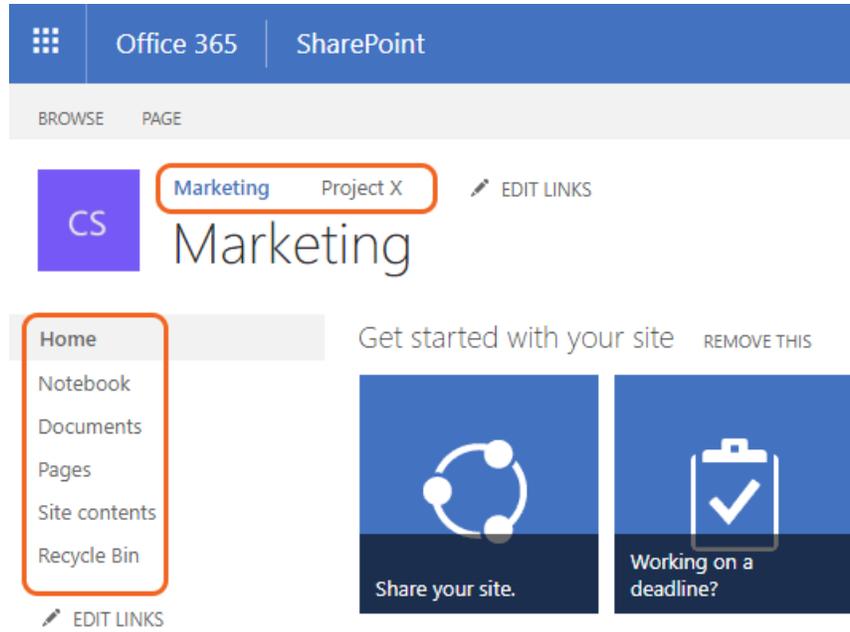
1. Verify that both the **Project X** and the **Marketing** sites have separate top link bars and Quick Launches.
 - A. Verify that you are currently in the **Project X** home page by clicking the **Project X** link in the top link bar.



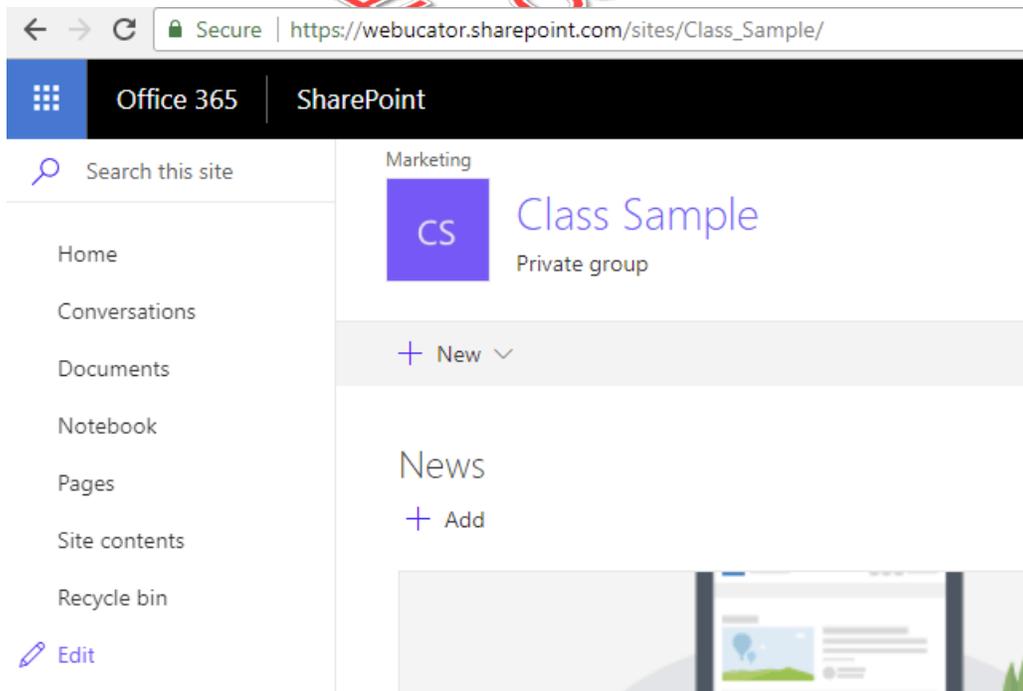
- B. Note that there are no additional links in the **Top link bar** of the **Project X** site.
- C. There is currently no obvious way to navigate back to the parent site **Marketing** from the child site **Project X**. To navigate back to **Marketing**, remove the text in browser's address field back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



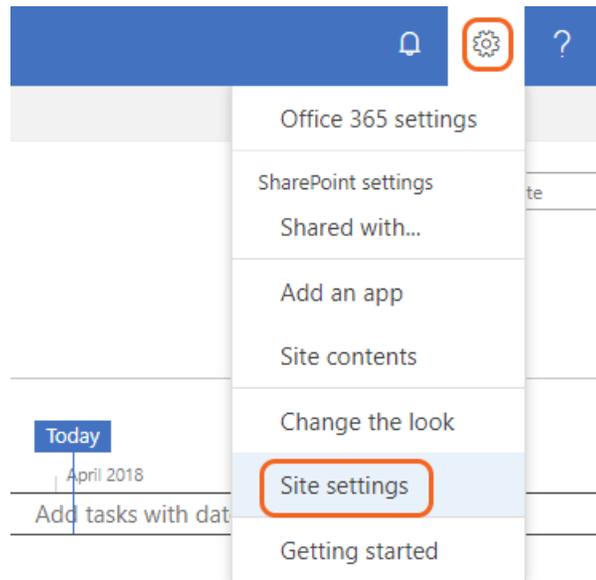
- D. Note that now the **Top link bar** has a **Marketing** link as well as a **Project X** link. Also note that the **Quick Launch Menu** lists only content from this site.



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



- F. Note that the root parent site currently has the three links in the **Top link bar** as shown in the image. The **Sample Site** link in this site's **Top link bar** links to the Home page for this site. Additionally, the **Quick Launch Menu** only has links for content within this site.
2. Configure the **Project X** site to share the **Top link bar** of its parent site **Marketing**.
- A. Navigate to the **Project X** site by first clicking the **Marketing** link in the **Top link bar** of the root parent site and then clicking the **Project X** link in the **Top link bar** of the **Marketing** site.
- B. Within the **Project X** site, click the **Settings** button and select the **Site Settings** link from the menu.



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

Site Settings

Users and Permissions
People and groups
Site permissions
Site app permissions

Web Designer Galleries
Site columns
Site content types

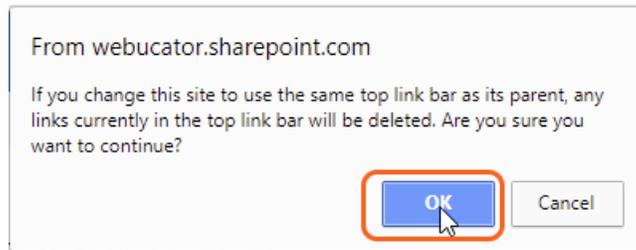
Look and Feel
Title, description, and logo
Quick launch
Top link bar
Navigation Elements
Change the look

Site Actions

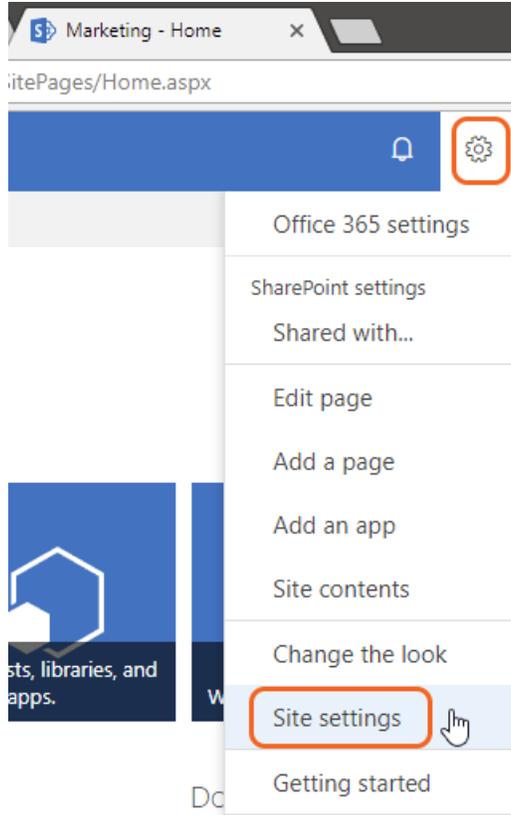
- D. Click the **Use Links from Parent** link on the **Top link bar** settings page.



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



- F. Verify that now the **Project X** site has the same **Top link bar** as the parent **Marketing** site.
- G. Click the **Marketing** link in the **Top link bar** and verify that it takes us to the Home page of the **Marketing** site.
3. Configure the **Marketing** site to share the **Top link bar** of its parent site, **Contoso Home Site**.
- A. Within the **Marketing** site, click the **Settings** button and select the **Site Settings** link from the menu.



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

Site Settings

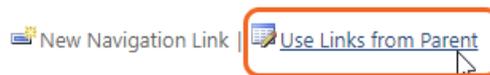
Users and Permissions
People and groups
Site permissions
Site app permissions

Web Designer Galleries
Site columns
Site content types

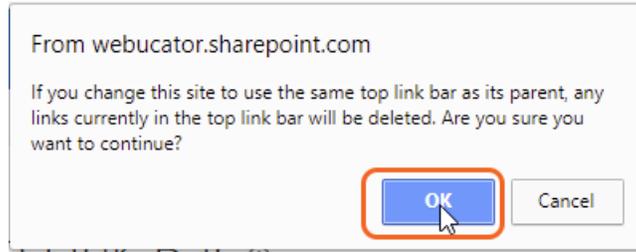
Look and Feel
Title, description, and logo
Quick launch
Top link bar
Navigation Elements
Change the look

Site Actions

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



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



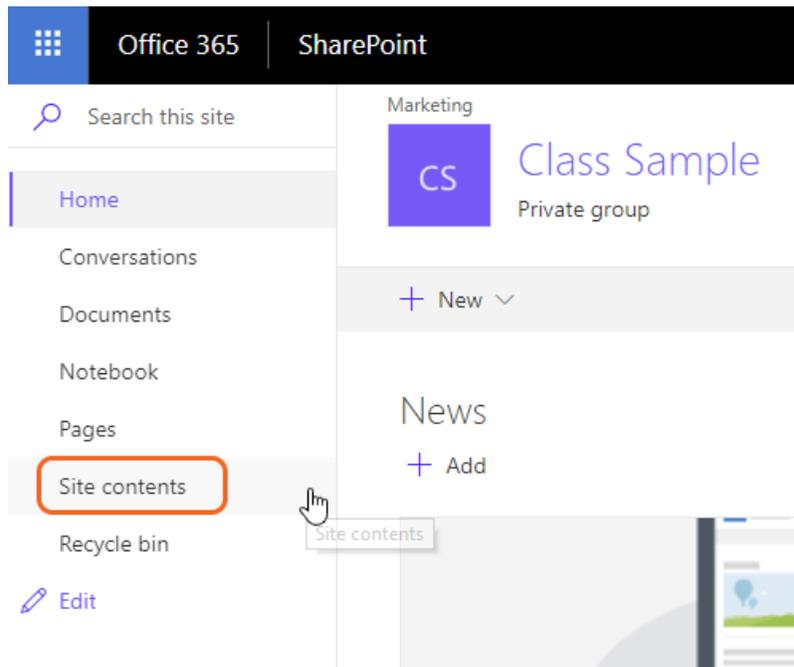
- E. Verify that now the **Marketing** site has the same **Top link bar** of the parent.

Exercise 9: Creating Team Sites

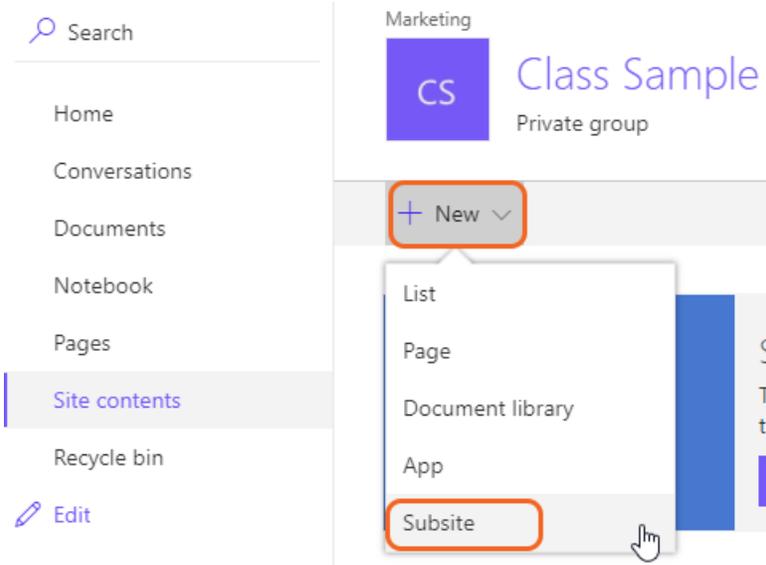
 10 to 15 minutes

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

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



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



- 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.



Title and Description

Title:

Description:

Web Site Address

URL name:

Template Selection

Select a language:

Select a template:

- Collaboration
- Enterprise
- Duet Enterprise
- Team site (classic experience)**
- Blog
- Project Site

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

Permissions

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

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

User Permissions:

- Use same permissions as parent site
- Use unique permissions

Navigation

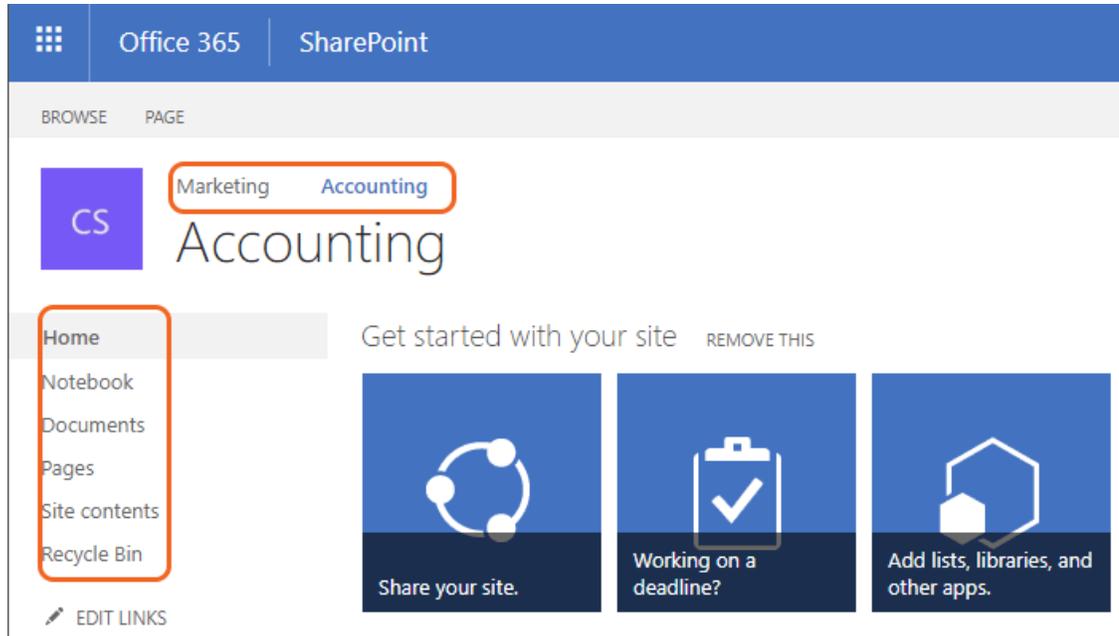
-  Display this site on the Quick Launch of the parent site?
 Yes No

-  Display this site on the top link bar of the parent site?
 Yes No

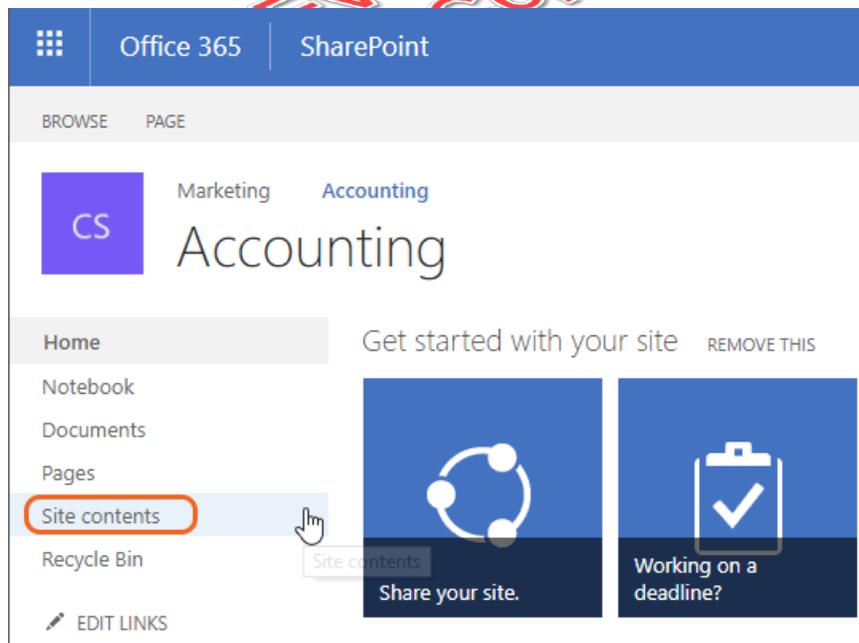
Navigation Inheritance

-  Use the top link bar from the parent site?
 Yes No

- 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.

CS Accounting

+ New ▾ Site usage Site workflows

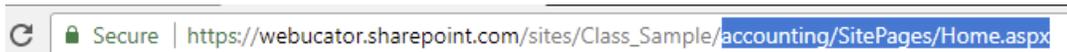
Site usage has moved!
Track visits, view trending content, and see what's shared with the "Site usage" page.
[Go to Site usage](#)

Contents Subsites

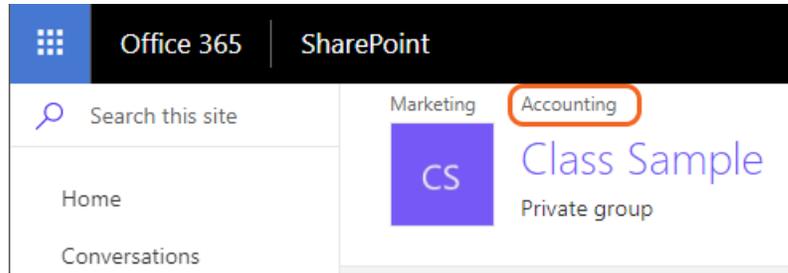
Name	Type	Items
Documents	Document library	0
Site Assets	Document library	1
MicroFeed	List	2
Power BI	App	
Site Pages	Page library	2

3. Navigate back to the root parent site.

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



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

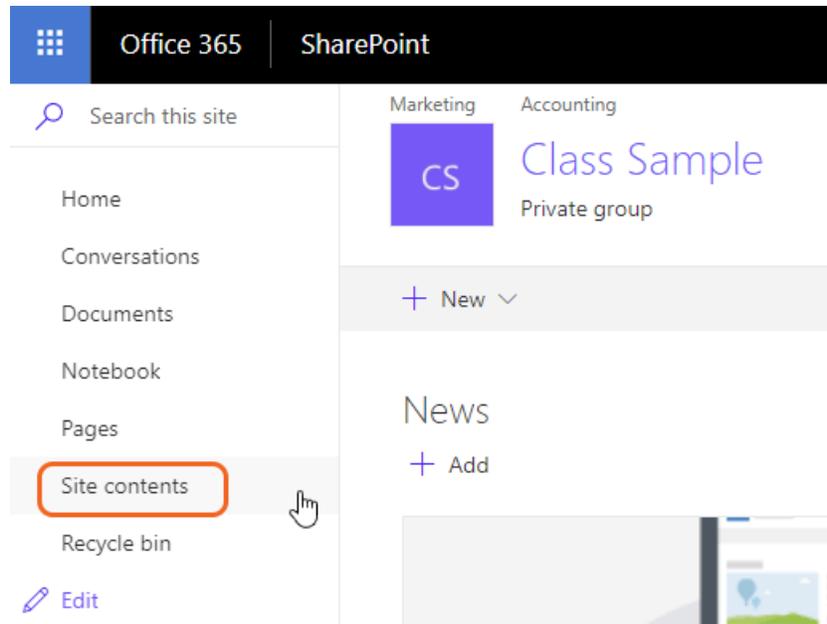


Exercise 10: Creating a Blog Site

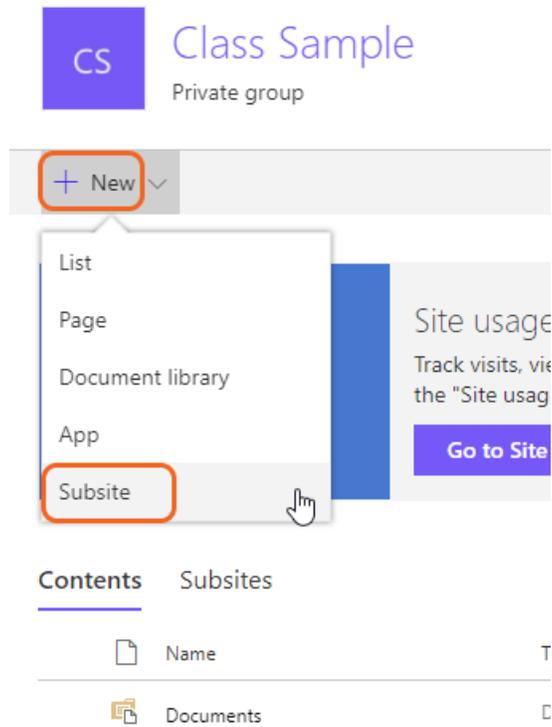
 15 to 25 minutes

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

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



- B. Scroll to the bottom of the site contents page and click the **new subsite** link.



C. Select the **Blog** template and enter “Student Blog” in the **Title** field and “studentBlog” in the **URL name** field.

Title and Description

Title:

Description:

Web Site Address

URL name:

Template Selection

Select a language:

Select a template:

- D. Scroll down and change the **Navigation Inheritance** to **Yes** to use the top link bar of the parent and then click the **Create** button to complete the new blog sites creation process.

Permissions

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

User Permissions:

Use same permissions as parent site
 Use unique permissions

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

Navigation

Display this site on the Quick Launch of the parent site?
 Yes No

Display this site on the top link bar of the parent site?
 Yes No

Navigation Inheritance

Use the top link bar from the parent site?
 Yes No

2. Explore the layout and contents of the new Blog site.
- A. Take a few moments to read the text within the **Home** page of the new blog site.



Student Blog

Categories

Events

Ideas

Opinions

ADD CATEGORY

Archives

April

OLDER POSTS

Welcome to my blog!

Monday, April 2, 2018

This is where I'll be sharing my thoughts on topics that matter to me. Who knows videos and links to other interesting stuff.

If I catch your interest, let me hear from you.

by Tracy Berry at 7:25 AM

0 comments | Like Email a link ...

B. Explore the Blog.



Conclusion

In this lesson, you have learned:

- What Site Templates are.
- About the different types of Site Templates that come “out of the box” with SharePoint.
- How to create a new site using Site Templates.
- How to create a Project site.
- How to create a Team site.
- How to create a Blog site.
- How to manage the sites listed in the top link bar.