# Lab 05A: Using and Customizing SharePoint Sites

**Lab Overview:** In this lab you will get some hands on experience with some of the standard, out of the box functionality of SharePoint. Not a lot of SharePoint administration going on here but still good things to know, how to work with the actual sites.

## Exercise 1: Adding a Web Part to the page

1. Login to the **portal** as **Alan Admin**
2. Navigate to the HR Work Site
   1. Hover over **Departments**
   2. Click **HR**
   3. From the quick launch bar click **HR Work Site**
3. Click Site Actions > **Edit Page**
4. Add a Web Part for viewing list contents to the page
   1. In the **Left** Zone click **Add a Web Part**
   2. Check the box beside **Shared Documents**
   3. Click **Add**

This has placed the Shared Documents Web Part at the top of the Left hand Column. This web part provides you a view of the list Shared Documents. Any time you create a new list you will automatically get this Web Part created for viewing the list. This is the same as the Announcements, Calendar, and Links Web Parts already present on the page.

1. Review the options available to all Web Parts
   1. Click **Edit** from the Shared Documents title bar
   2. From the drop down list choose **Modify Shared Web Part**

Take a moment to notice the different option you have for modifying mostly how a Web Part displays.

* + 1. Changing the size
    2. Modifying the Chrome (border/title bar)
    3. Determine how users can interact with the Web Part (Minimize, Close, Hide)
    4. Targeting (Only displaying for certain users/group/audiences)
  1. At the top of the web part zone you will see settings unique to the Web Part. For the list view web part you can control the view and the toolbar.
  2. Click **Cancel**

1. Add a functional web part to the page
   1. Click **Add a Web Part** from the **Left** zone
   2. Scroll down the list, under the Miscellaneous section select the box beside **Content Editor Web Part**
   3. Click **Add**
2. From the Web Part click **open the tool pane**
3. This Web Part allows you to enter Text to display on the page using a Rich Text Editor.
   1. Click **Rich Text Editor…**
   2. Add some text and try out some of the formatting options. You could insert a picture or hyperlink, add a table, and do most basic text formatting options. Once you are finished click **OK**.
   3. Click **OK** to close the tool pane.
4. This Web Part also allows you to directly enter HTML code (including <Scripts>) using the Source Editor
   1. Click **Edit** from the toolbar
   2. Click **Modify Shared Web Part**
   3. Click the **Source Editor…**
   4. It will show you the HTML that was generated previously by the Rich Text Editor. **Delete all of the text and tags.**
   5. Insert the following code

<script>alert(“Changing title to red”)</script>

<style>

.ms-sitetitle a

{

Color:red;

}

</style>

* 1. Click **Save**
  2. As the page reloads you will get a popup message click **OK**
  3. Now notice the title HR Work Site is red. Very powerful little tool.

1. Once you are done playing with the content editor web part delete it from the page.
   1. Click **Edit** from the toolbar
   2. Click **Delete**
   3. Click **OK** at the warning

## Exercise 2: Adding documents to a document library.

1. Upload a single document
   1. From the home page of the HR Work Site click **Shared Documents**
   2. Click **Upload**
   3. Browse to **c:\\_Student Files\Module 5\**
   4. Select **Document 1.docx**
   5. Click **Open**
   6. Click **OK**
2. Navigate back to the home of the HR Work Site by clicking the breadcrumb

You can see now that your document is automatically displayed in the Shared Documents Web Part you added earlier.

1. Upload a document using the Web Part
   1. Right below Document 1 click the link **Add new document**
   2. Browse to **c:\\_Student Files\Module 5\**
   3. Select **Document 2.docx**
   4. Click **Open**
   5. Click **OK**

Now you are returned to the home page where you see both documents displayed. You just used the shortcut Add new document to add the document instead of navigating back to the list.

1. Add a column of metadata
   1. Click **Shared Documents**
   2. Click Settings > **Document Library Settings**
   3. These are all of the settings that are unique to this list. Scroll down the page and under Columns click **Create column**
   4. Column name = **Even or Odd**
   5. Type of column = **Choice (menu to choose from)**
   6. Require that this column contains information = **Yes**
   7. Choices = **Even Odd**
   8. Clear out the **Default value**
   9. Click **OK**
2. Upload another document
   1. Click **Shared Documents** from the bread crumb
   2. Click **Upload**
   3. Browse to **c:\\_Student Files\Module 5\**
   4. Select **Document 3.docx**
   5. Click **Open**
   6. Click **OK**
   7. This time you are prompted for the required information Even or Odd. Select **Odd** and click **Check In.**
3. Notice now in the Document Library there is a new column that contains your entered metadata. Also, notice that Document 1 and 2 are blank. You need to add their metadata.
   1. Hover over **document 1**
   2. Click the dropdown and select **Edit properties**
   3. Set Even or Odd to **Odd**
   4. Click **OK**
   5. Repeat for **Document 2** setting it to **even**

## Exercise 3: Creating a view

Now you will create a custom view. Views are used to display only the items and the metadata that you want. They are very flexible and powerful.

1. Click Settings > **Document Library Settings**
2. Scroll to the bottom of the page and click **Create view**
3. Choose the **Standard View**
4. View Name = **Odd Documents**
5. Scroll down to Filter and select **Show items only when the following is true:**
6. Show the item when column **Even or Odd**
7. **Is equal to**
8. **Odd**
9. Take a moment to notice the other options you have available when creating views
10. Click **OK**

Now you will see that you are only displaying the documents marked Odd.

1. To change the view back you can click View: and select All Documents. (To the right of Settings)

Keep in mind all of these settings are universal across all list. What is a list? Just about everything in SharePoint. Examples: Document Libraries, Page Libraries, Calendars, Announcements, Discussion Boards, and even Surveys.

## Exercise 4: Create a custom list

Custom list allow you to create your own list. Think of every time you have ever created an Access database or Excel Spreadsheet just to track or collect some basic information. You can now do that in a custom SharePoint list and use all of the power of SharePoint. In this example you will create a custom list for tracking spending in the HR department.

1. Click Site Actions > **Create**
2. From the Custom Lists column choose **Custom List**
3. Name = **Budget Tracking**
4. Click **Create**

This will create you a new blank list with only the Title column. You will need to grow out the list.

1. You cannot delete the Title column from a custom list, so you must rename it to make it work for your scenario.
   1. Click Settings > **List Settings**
   2. Under Columns click **Title**
   3. Change the Column name from Title to **Purchased Item**
   4. Click **OK**
2. Create a Date Purchased column
   1. Under Columns click **Create column**
   2. Name = **Date Purchased**
   3. Type of column = **Date and time**
   4. Click **OK**
3. Create an Amount column
   1. Under Columns click **Create column**
   2. Name = **Amount**
   3. Type of column = **Currency**
   4. Click **OK**
4. Create a Quantity column
   1. Under Columns click **Create column**
   2. Name = **Quantity**
   3. Type of column = **Number**
   4. Click **OK**
5. Create a Budget Category column
   1. Under Columns click **Create column**
   2. Name = **Budget Category**
   3. Type of column = **Choice**
   4. Choices = **Supplies, Hiring, Travel**
   5. Set the **Default** value to blank
   6. Click **OK**
6. Create a Total Spent column
   1. Under Columns click **Create column**
   2. Name = **Total Spent**
   3. Type of column = **Calculated**
   4. Formula = **[amount]\*[quantity]**
   5. Type of value to return = **Currency**
   6. Click **OK**
7. Fill out the list
   1. Click **Budget Tracking** in the breadcrumb
   2. Repeat steps C – E for each item in the table

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Purchased Item | Date | Amount | Quantity | Category |
| Red Staplers | 10/1 | 12.00 | 3 | Supplies |
| Staples | 10/1 | 3.25 | 3 | Supplies |
| Monster Ads | 9/15 | 450.00 | 2 | Hiring |

* 1. Click **New**
  2. Fill in the information
  3. Click **OK**

Notice that the Total Spent column is automatically filled out.

## End of Lab