# Lab 05B: Modifying Navigation

**Lab Overview:** In this lab you will manipulate SharePoint’s Navigation options. You will explore how you can use Global Navigation to provide a consistent and expected environment for users as they navigate your portal. Also, you will manipulate the Current Navigation to modify the per site experience. Strong navigation is a key to every good web experience.

## Exercise 1: Modifying the Global Navigation bar

1. Open the **home page** of the portal logged in as **Alan**
2. Click Site Actions > Site Settings > **Modify All Site Settings**
3. Under Look and Feel click **Navigation**

Because this site is the root site the options here are limited. As you can see the Global Navigation bar is currently showing all of the sub-sites of the Portal and all pages (except default.aspx) from the pages libraries of these sites.

1. Add the www site to the Global Navigation
   1. Click **Add Link**
   2. Title = **Public Web**
   3. URL = **http://www.tedpattison.net**
   4. Select **Open link in new window**
   5. Click **OK**
   6. Click **OK**

Now there is a tab for Public Web. If you click the tab it will open a new browser window and take you to the web site.

1. Hide the Reports tab
   1. Click **Navigation**
   2. Click **Reports**
   3. Click **Hide**
   4. Click **OK**
2. Remove the pages from the drop down below News
   1. Click the **News** tab
   2. Click Site Actions > Site Settings > **Modify All Site Settings**
   3. Click **Navigation**

Notice now you have several new options. You can choose to use Global Navigation of the parent or not, also you can choose to show the Current Navigation of the parent or this site.

* 1. In the Subsites and Pages section deselect **Show pages**
  2. Click **OK**

Notice under News now there are no drop downs. Whenever you want to affect a tab you should always need to go to that sites Navigation options to make the change.

1. Navigate to HR Work Site
   1. Click the **Departments** tab
   2. Click **HR** from the Current Navigation
   3. Click **HR Work Site** from the Current Navigation
2. The HR Work Site is an area just for the HR Team. As they build out this area they will have many sub-sites and would like to have their own Global Navigation from this site down. You need to setup HR Work Site to use its own Global Navigation.
   1. Click Site Actions > **Site Settings**
   2. Click **Navigation**
   3. In the Global Navigation section click **Display the navigation items below the current site**
   4. Click **OK**
   5. Click the **HR Work Site** tab

Notice now there is only one tab in the Global Navigation. You can now build out the HR Global Navigation. Also, if you look in the top left hand corner of the screen you will see The TPG Portal > HR Work Site. This is giving you a global breadcrumb for getting back to the portal above.

## Exercise 2: Build out the HR site Structure

From here Betsy would like to start building out her own structure and navigation. She currently only has contributor access to the site. Add her to site owners group. Then she will create an HR managers meeting sub-site and add a tab for the HR site collection created earlier.

1. Add Betsy as a site owner
   1. Click Site Actions > **Site Settings**
   2. Click **People and Groups**
   3. Click **New**
   4. Users/Groups = **tpg\Betsy**
   5. Add users to a SharePoint group = **HR Work Site Owners [Full Control]**
   6. Deselect **Send Welcome e-mail**
   7. Click **OK**
2. Sign in as Betsy
   1. Click **Welcome Alan Admin**
   2. Click **Sign in as Different User**
   3. User name = **tpg\betsy**
   4. Password = **pass@word1**
   5. Click **OK**
3. Create the Manager Meeting Site
   1. Click Site Actions > **Create**
   2. Under Web pages click **Sites and Workspaces**
   3. Title = **Manager Meeting Site**
   4. URL = **/managermeeting**
   5. Choose the **Meetings** tab
   6. Select **Decision Meeting Workspace**
   7. Click **user unique permissions**
   8. Click **Create**
   9. Take the defaults
   10. Click **OK**
4. The Meeting site automatically used it is own Global Navigation. Switch it to use the HR Work Site navigation
   1. Click Site Actions > **Site Settings**
   2. Click **Navigation**
   3. Under Global Navigation choose **Display the same navigation items as the parent site**
   4. Click **OK**
5. Now set the HR Work Site to show sub sites
   1. Click the **HR Work Site** tab
   2. Click Site Actions > **Site Settings**
   3. Click **Navigation**
   4. Select **Show subsites**
   5. Click **OK**

Now if you look at the Global Navigation bar you will see that the Manager Meeting Site automatically was added.

1. Add a link to http://portal.tpg.local/sites/hr
   1. Click **Navigation**
   2. Click **Add Link**
   3. Title = **HR Private Site**
   4. URL = **http://portal.tpg.local/sites/hr**
   5. Click **OK**
   6. Click **OK**
2. Test Navigation
   1. Click the **HR Work Site** tab
   2. Sign in as **Amy**
      1. Click **Welcome Betsy Ross**
      2. Click **Sign in as Different User**
      3. User name **TPG\amy**
      4. Password **pass@word1**
      5. Click **OK**

Take a look at the navigation bar. Because Amy doesn’t have access to the Manager Meeting site that tab is hidden from her. But if she clicks on the link to HR Private Site she gets Accessed Denied. Why doesn’t SharePoint security trim this tab also? Because the tab points to a different Site Collection. Since it is in another site collection SharePoint doesn’t check the permissions. So it just shows the tab to everyone. Something to consider when using multiple site collections. You could have targeted the link using Audiences to hide it from Amy but you haven’t learned that yet.

1. Log back in as Betsy
   1. Click **Welcome Amy Pattison**
   2. Click **Sign in as Different User**
   3. User name **tpg\betsy**
   4. Password **pass@word1**
   5. Click **OK**

## Exercise 3: Clean up current navigation

Current navigation has many names. Quick launch and left hand nav are the most common names. Often users are confused by the extra links on the current navigation. In this exercise you will remove the extra links and the add a new heading with sub links.

1. Remove some quick launch links
   1. Click Site Actions > **Site Settings**
   2. Click **Navigation**
   3. In Navigation Editing and Sorting find **Current Navigation**
   4. Click **Sites**
   5. Click **Delete**
   6. Click **People and Groups**
   7. Click **Delete**
   8. Click **Manager Meeting Site**
   9. Click **Hide**
   10. Click **OK**
2. Click the **HR Work Site** and review your changes
3. Now add Insurance sites with a heading
   1. Click Site Actions > **Site Settings**
   2. Click **Navigation**
   3. In Navigation Editing and Sorting Click **Current Navigation**
   4. Click **Add Heading…**
   5. Title = **Insurance Sites**
   6. Click **OK**
   7. Click **Insurance Sites**
   8. Click **Add Link**
   9. Title = **Anthem**
   10. URL = **http://www.anthem.com**
   11. Select **Open link in new window**
   12. Click **OK**
   13. Click **OK**
4. Click **HR Work Site** tab and check out your changes.

## Exercise 4: A couple more quick launch tricks

Two more things with the quick launch bar. It is possible to remove it all together if it is cluttering up your site. Also, SharePoint has a built in Tree view control you can enable on the quick launch bar.

1. Turning on the Tree view
   1. Click Site Actions > **Site Settings**
   2. Under Look and Feel click **Tree view**
   3. Select the box **Enable Tree View**
   4. Click **OK**
2. Click the **HR Work Site** tab

Now below the current navigation you can see the Site Hierarchy. You can expand the various sections of the site to see its sub information. Unfortunately there are no settings for the Tree view. You cannot manipulate what it shows or if a section is expanded or not. This limits the Tree views usefulness.

1. Disable the current navigation
   1. Click Site Actions > **Site Settings**
   2. Under Look and Feel click **Tree view**
   3. Deselect **Enable Quick Launch**
   4. Click **OK**
2. Click the **HR Work Site** tab

Now all that remains is View All Site Content and the Tree view

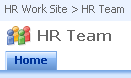
1. Disable the **Tree view**
   1. Click Site Actions > **Site Settings**
   2. Under Look and Feel click **Tree view**
   3. Deselect **Enable Tree View**
   4. Click **OK**
2. Click the **HR Work Site** tab

All gone. Nothing but wasted blue space.

## Exercise 5: Looking at navigation in a separate Site Collection

Because the private HR site is a separate site collection it has no options for using the portals navigation. Also, by default it does not have a link for navigating to the portal. Finally, it doesn’t exactly have the Navigation option because that site collection does not have the publishing features activated. Sounds like it needs a little investigating.

1. Click the **HR Private Site** tab
2. Add the connection back to the HR Work Site in the global breadcrumb
   1. Click Site Actions > **Site Settings**
   2. Under Site Collection Administration click **Portal site connection**
   3. Click **Connect to portal site**
   4. Portal web address = **http://portal.tpg.local/departments/hr/hrwork**
   5. Portal Name = **HR Work Site**
   6. Click **OK**



1. Under Look and Feel notice there is no Navigation option. Instead click **Top link bar**

This interface will only allow you to add new tabs and change their order. There are no options for using headings, displaying pages, or sub-sites. Just add and remove tabs.

1. Click **Site Settings** in the bread crumb
2. Under Look and Feel click **Quick Launch**

Another limited interface. Though here you can use headings. These difference are important to understand as they do cause user question from time to time.

Also, Tree view is exactly the same as in Publishing sites.

## End of lab