SharePoint Communication Sites

SharePoint Communication Site

Hands-on Lab Step-by-Step

June 2018

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SharePoint Communication Sites

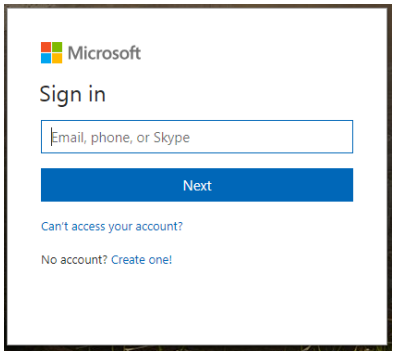
Introduction: Jeronimo Martins Summer Trip Scenario

Imagine an organization Jeronimo Martins are planning a summer trip around Portugal for the company employees. The summer trip team would like to build a SharePoint communication site that runs on the web and mobile devices, which will help the event registration and also give all information about it for the company employees

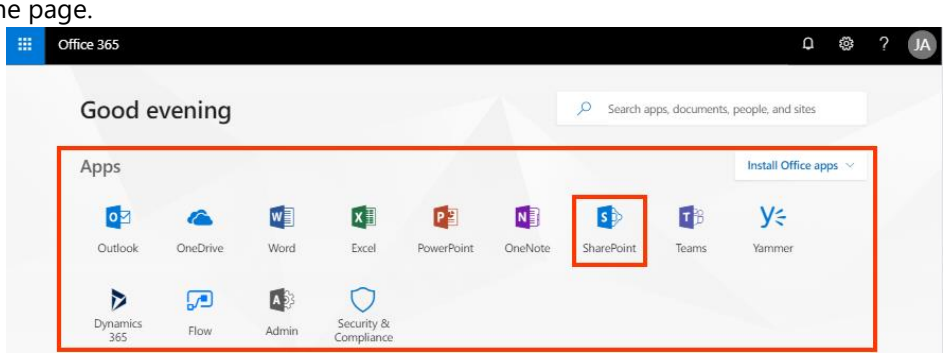
Exercise 1: Create the SharePoint communication site

Task 1: Sign-in to Office 365 portal

1. Go to https://portal.office.com.
2. Sign in with your business account if you have not already done so.

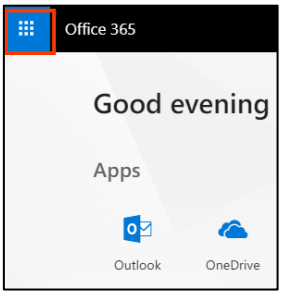


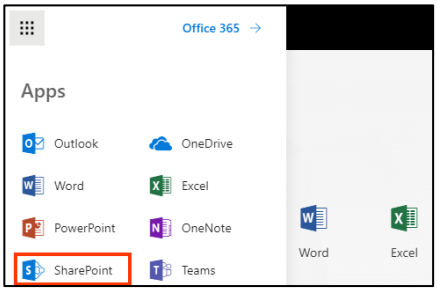
3. In the Office 365 portal see the **"Apps"** section. Click the **SharePoint** app and then you will redirect to the SharePoint home page.



Note: If you don't see this SharePoint icon, follow the next steps.

4. In the Office 365 portal click on the **"app launcher"** in the top left and select SharePoint.





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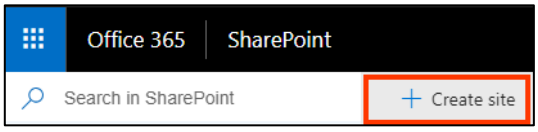
Task 2: Create a new communication site

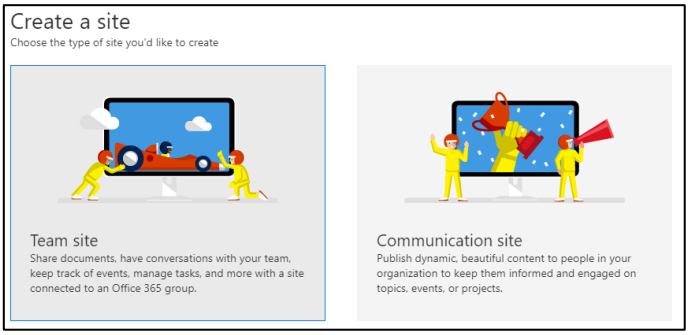
1. In the **SharePoint Home Page** click the **Create site** as show bellow.



Note: if you don't see this option then your self-service site creation is not enabled for your ID.

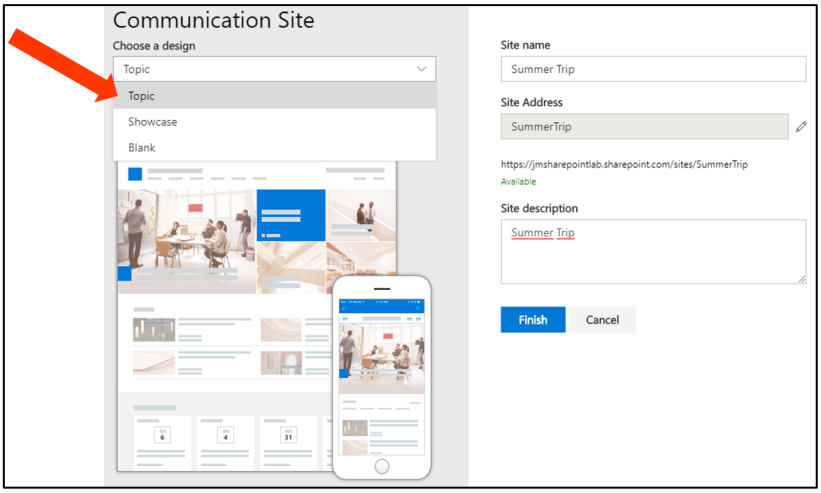
This will open a new area at the right side to choose the site template that you want to create.

2. Click in the **"Communication site"** option.



3. Click in the **"Communication site"** option.

- Give your communication site **name**, such as for example **"Summer Trip"** (feel free to choose the name)
- Choose the **"Topic"** design. (Choose another option if there is a default design for the organization)
- Put same text into the **description** area (not required)



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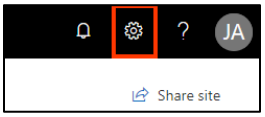
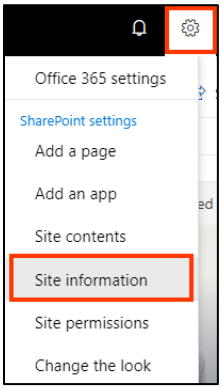
Task 3: Change the site information and add an icon

In this task, you will rename the site title and add an icon.

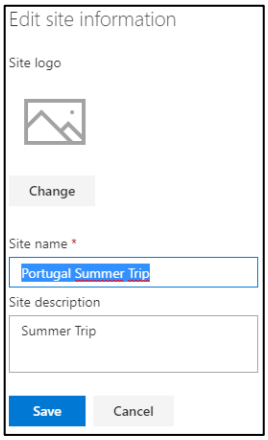
1. Click the setting icon in the top right (navigation bar).



2. Select the "**Site information**" option.



3. Change the Site name to **"Portugal Summer Trip".**



4. Click the **"Change"** button

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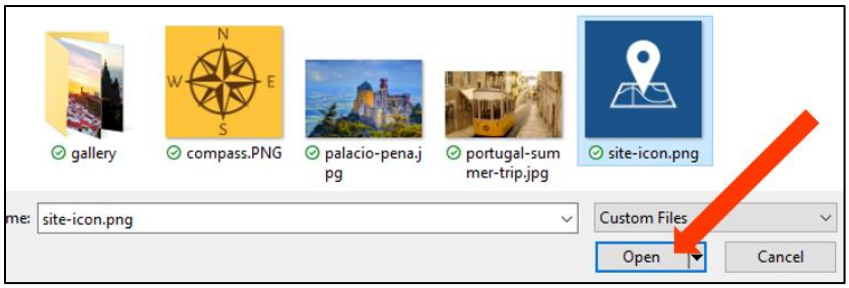
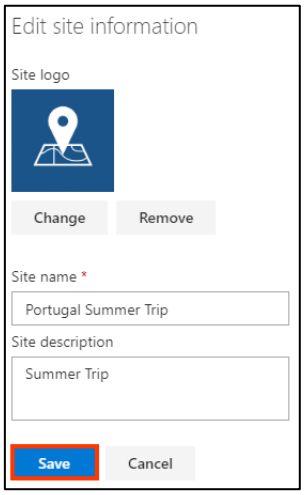
5. In the File Open dialog, browse to the location where you unzipped the data file (for example C:\JM\SharePointOnLabContent\) and navigate to images folder and select **site-icon.png** to load it.



6. After completed all steps, click **"Save"** button to publish changes.



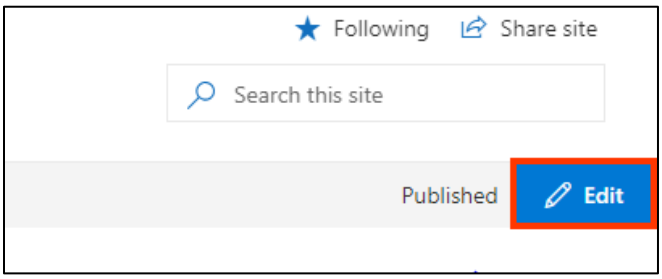
Exercise 2: Edit site homepage

In this exercise, you will start edit page and also work with the new SharePoint Hero control and change it at the home site page.

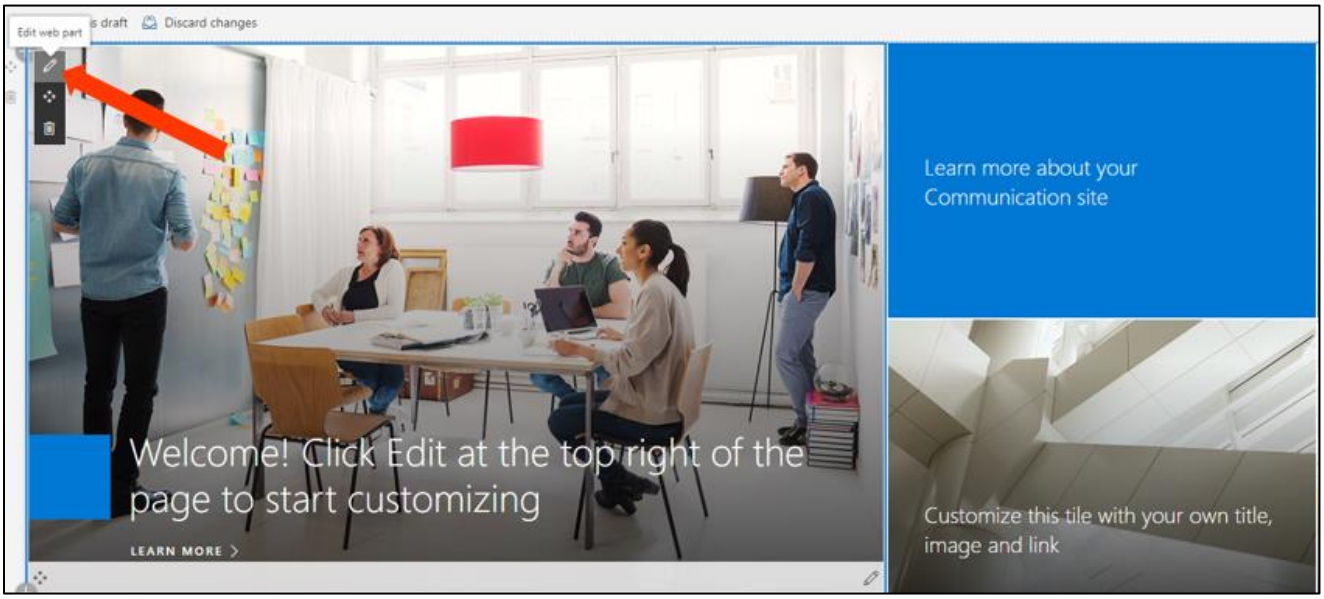
Task 1: Change hero web part control

This is a new web part which has tiles with various layouts available to show the highlights of the site. You can embed an image, link to the external content. We can say there is no need to create a custom news slider/carousel Just configure this web part!!

1. In the site home page, click the **"Edit"** button.



2. In the **Hero** control select the **Edit** icon



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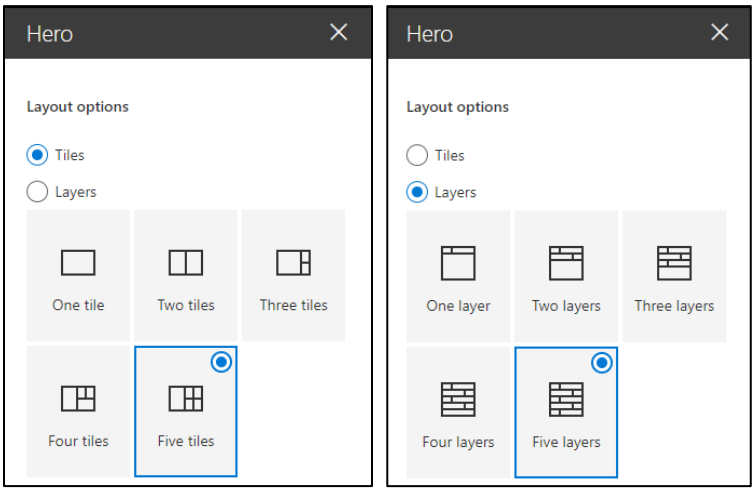
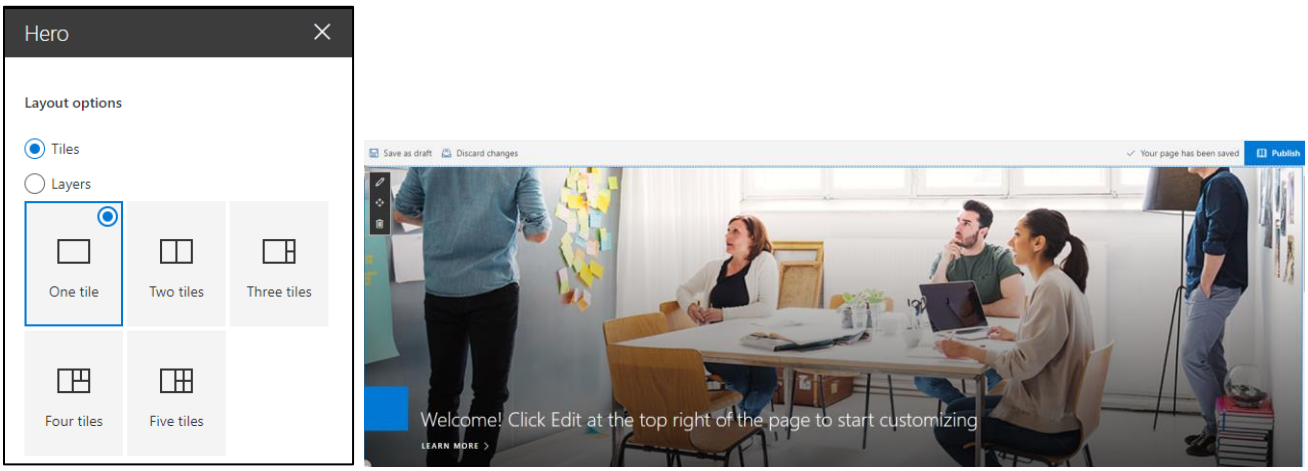
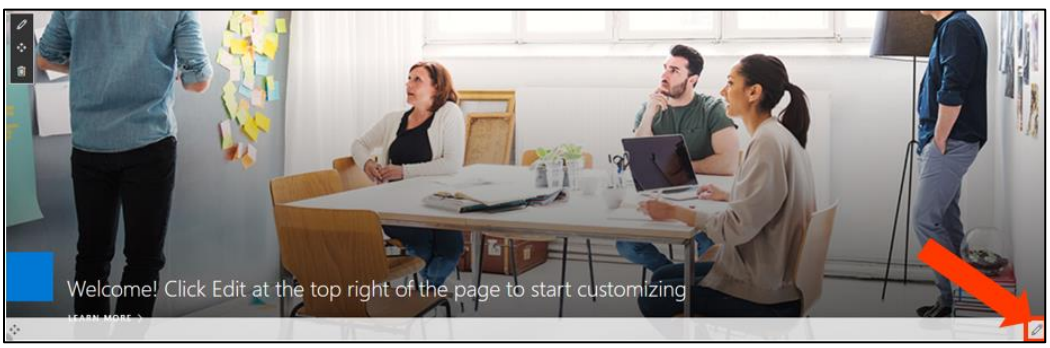
3. The Hero **Layout options** will open at the right side of the screen with control default settings.



4. Change the tile to **"One tile"** and automatically the layer option is change to **"One layer"** too.

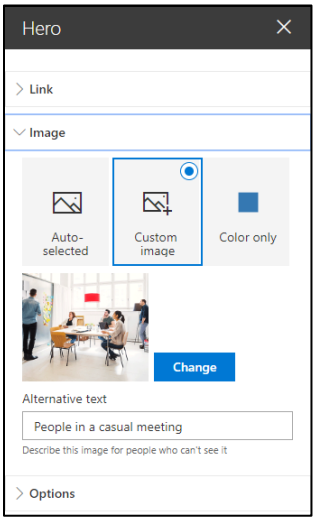


5. Click **"Edit"** button to change banner information.



6. Open a **Hero** section area (banner options) at right side of the screen

7. Click to open the **"image"** section and select the **"Custom Image"** option.



8. Click **"Change"** button

9. In the SharePoint dialog, select **"Upload"** option to download file from your desktop location.

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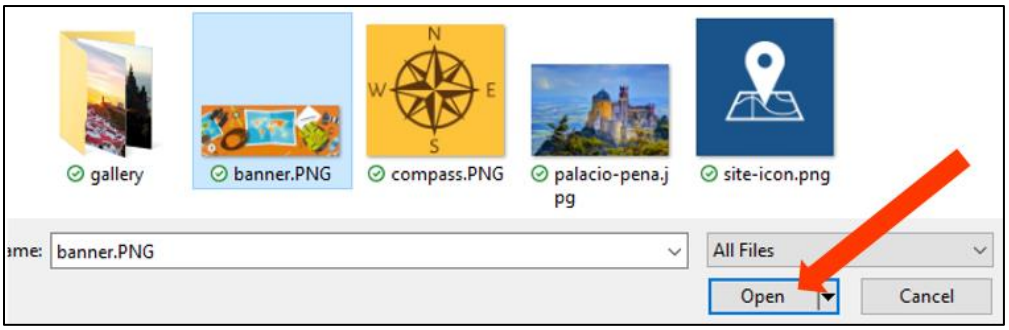
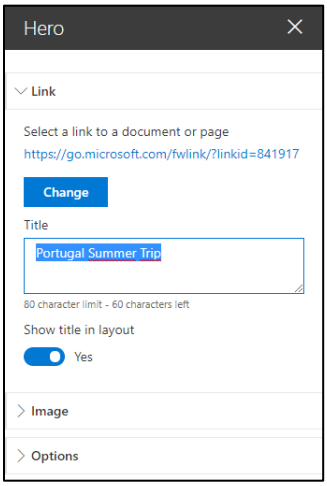
10. In the File Open dialog, browse to the location where you unzipped the data file (for example C:\JM\SharePointOnLabContent\) and navigate to images folder and select **banner.png** to load it



11. Click to **"Add image"** in the SharePoint dialog

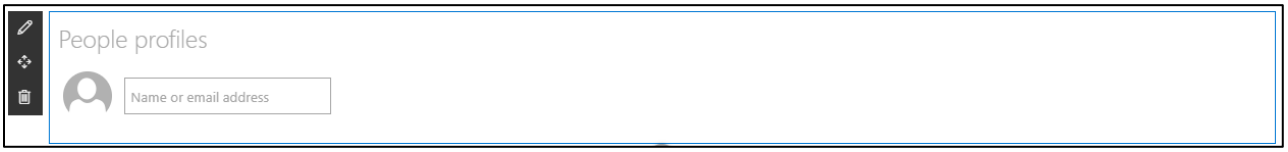
12. Still in the **Hero** section area, click in the **"Link"** option

13. Change the title to **"Portugal Summer Trip"**

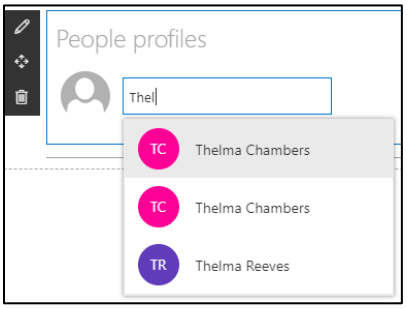


Task 2: Add summer trip team members

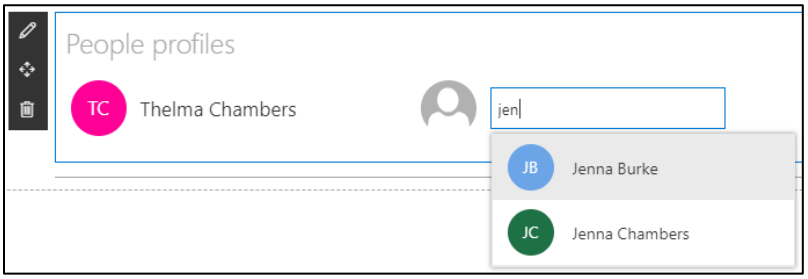
1. At the page bottom select the **People** control



2. In **People** control search for people or group into the text area and then select the right one into the dropdown available options.



3. Add other ones if you want to compose the team members.



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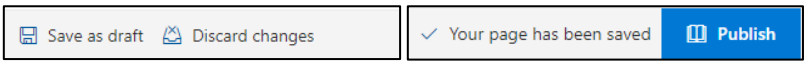
Task 3: Save as Draft or Publish page changes

1. Save all changes
   - Save as draft: available for just for users with edit permissions.
   - Discard changes: discard all changes to the latest state (latest major saved version)
   - Publish: Perform this action to publish the page to published major version as available for all member which have access to the communication site.



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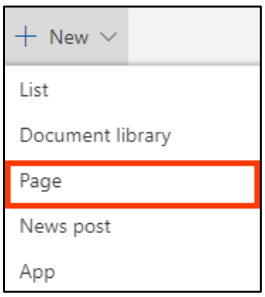
Exercise 2: Add a new page

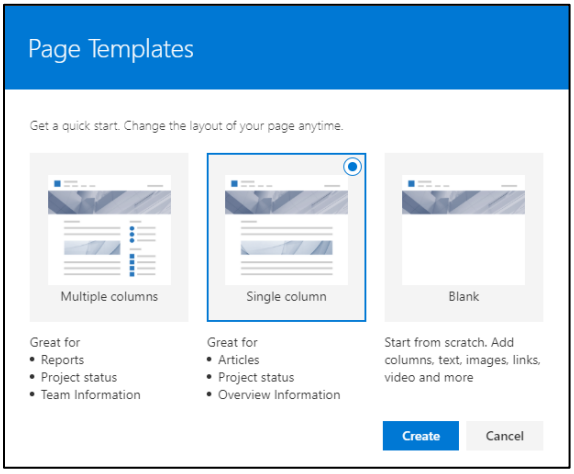
In this exercise, you will add a new page to the communication site for end users to get a quick overview as well as relevant information of the summer trip.

Task 1: Add a new page

1. Select the **+ New** option and then choose the **Page** option



2. In the **Page Templates** dialog quick start select the **Single column** template and then click **Create** button to initialize a new page.



3. In the new page (notice that page is in editing mode)

   - Give your communication page **name**, such as **"Program Overview"**

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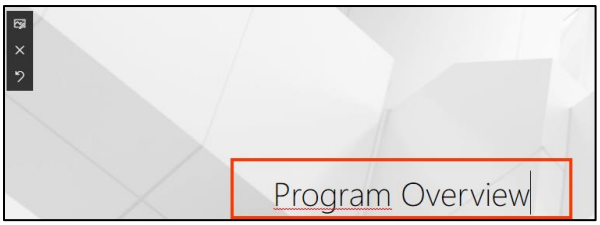
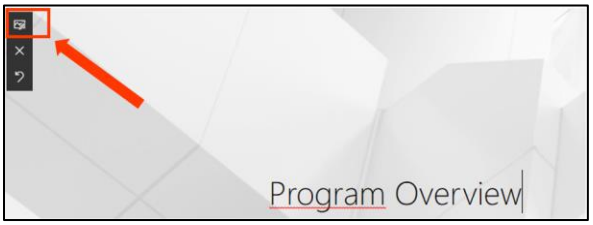
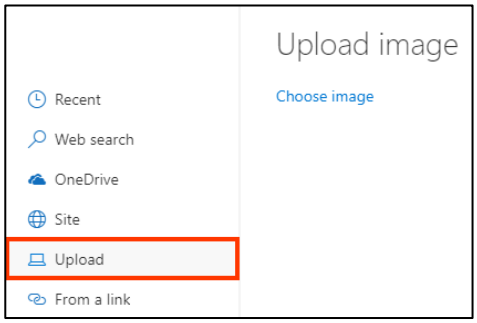
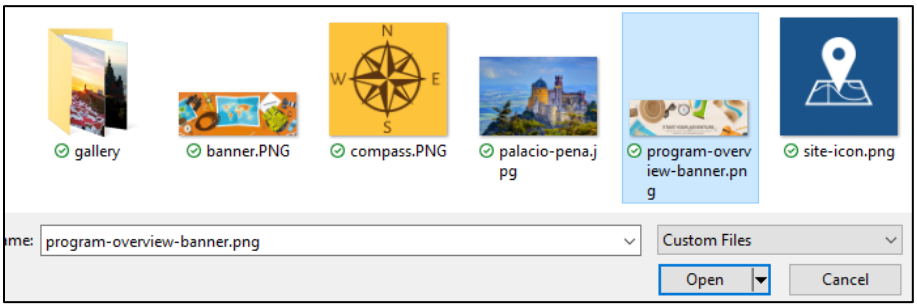


4. Click to **change** the banner image behind the title and then choose **Upload** option into the dialog.

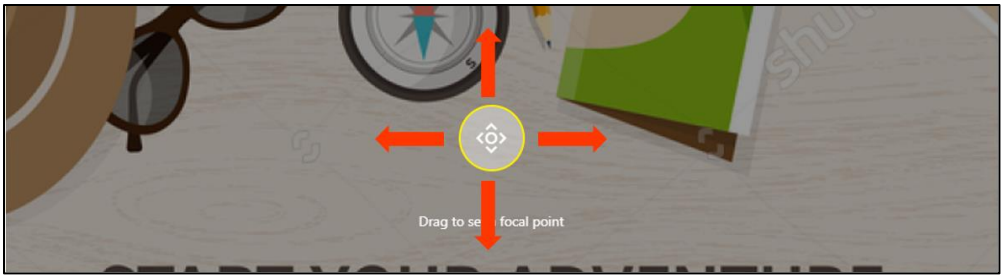




5. In the File Open dialog, browse to the location where you unzipped the data file (for example C:\JM\SharePointOnLabContent\) and navigate to images folder and select **program-overview-banner.png** to load it



6. Using the drag control, re-adjust the image banner to a focal point the within image control.

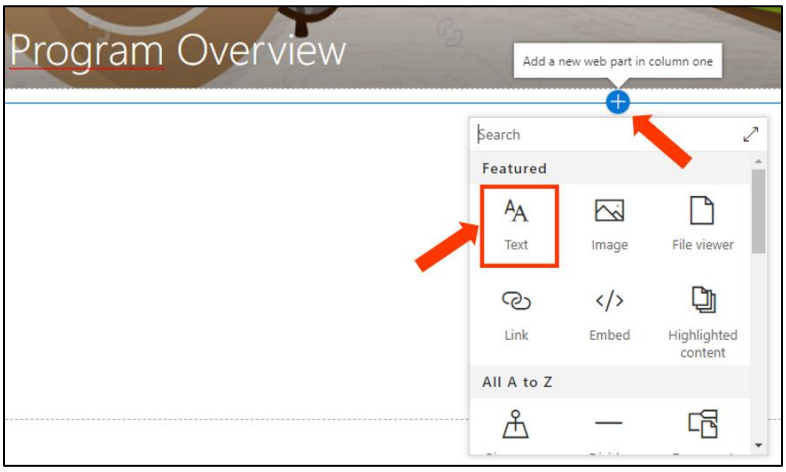


7. Save the page changes as draft.

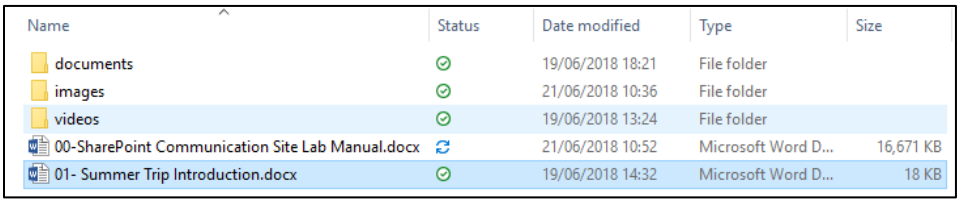
Task 2: Configure text control in the page content area.

1. Start editing page.

2. Into the page content area select **+ (plus)** icon to add a new web part in column one and choose the **Text** feature as the image bellow.



1. The **Text** feature was added to the page and is available to insert content. So, browse to the location where you unzipped the data file (for example C:\JM\SharePointOnLabContent\) and open **01- Summer Trip Introduction.docx**



2. In the document **copy (Ctrl-C)** entire text**.**

3. **Paste (Ctrl-V)** into the text control.

4. Save the page changes as draft.

Note: When you paste text into the text control, all text properties remain such as tables, header, paragraphs, bolds, italics, links, bullets.

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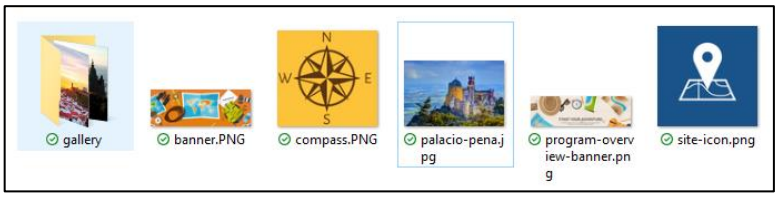
Task 3: Add image to text control

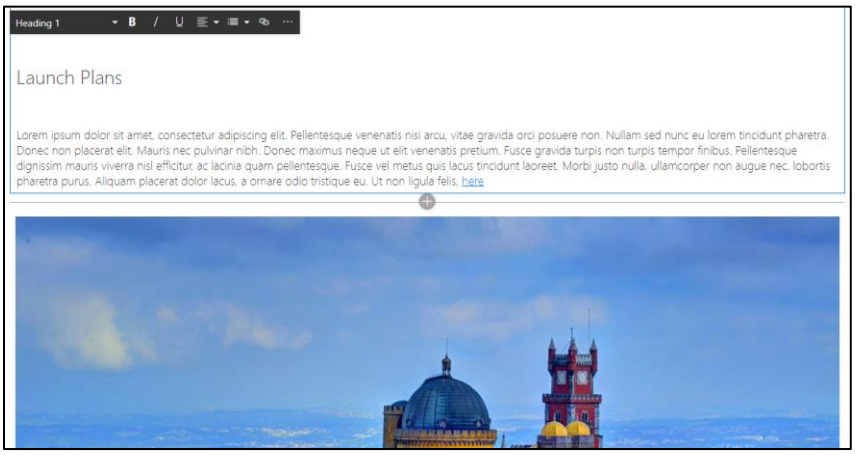
1. Start editing page.

2. Browse to the location where you unzipped the data file (for example C:\JM\SharePointOnLabContent\) and navigate to images folder



3. Drag and drop the image **palacio-pena.jpg** into the text control right there below the **"Launch Plans"** section.

4. You can see the image right there below the text control as the following image

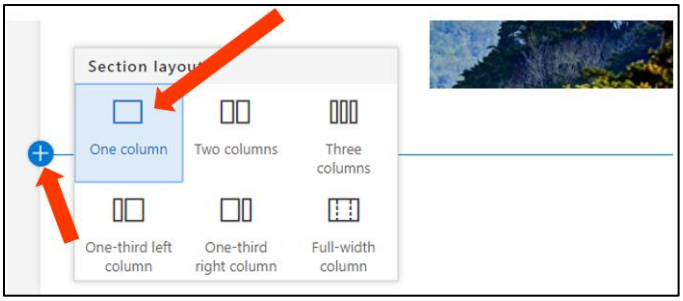


5. Save the page changes as draft.

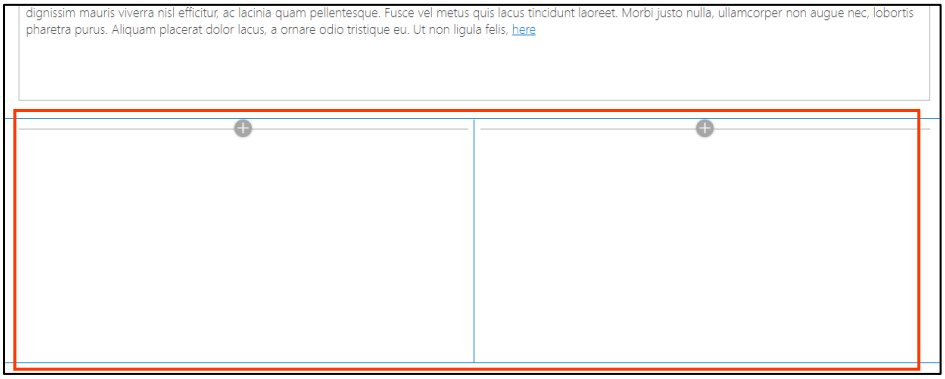
Task 4: Add a new section into the page

1. Start editing page.

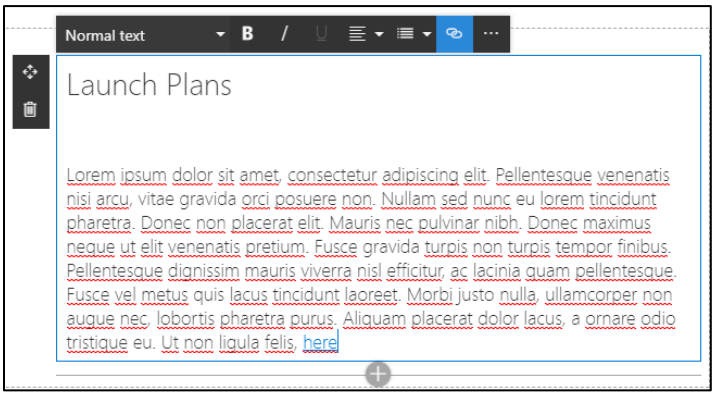
2. Right below the previous added image select **+ (plus)** option to initialize a new section and then choose the **"Two columns"** option such as the following image.



3. A new section with two columns was added into the page content



4. In the **left column** select **+ (plus)** option, choose the **Text** feature and then **copy (Ctrl-C)** entire **"Launch Plans"** text section (in text control) into this control.



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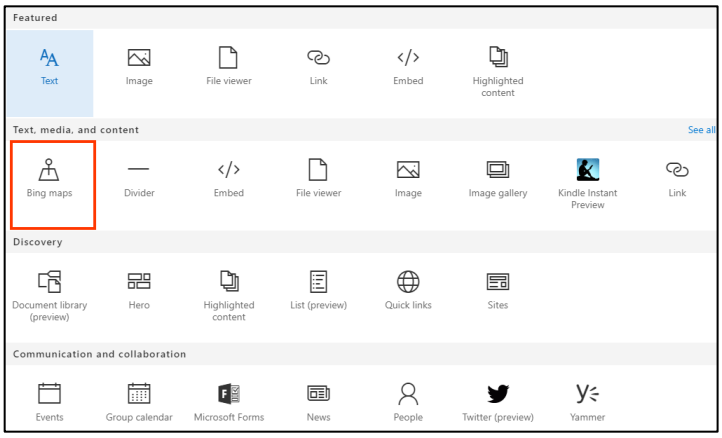
5. In the image, added in the previous steps, select the **Move** option to **drag and drop** it to right column into the new section.

6. Save the page changes as draft.

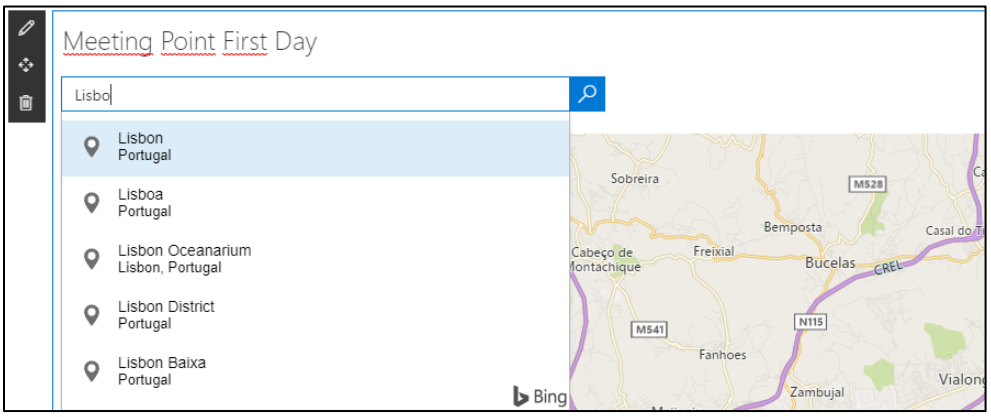
Task 5: Use Bing Maps to display the meeting point

1. Start editing page.

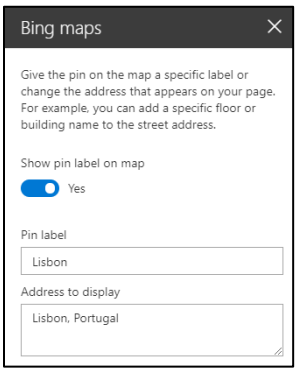
2. Into the page content area select **+ (plus)** icon to add a new web part in column one and choose the **Bing maps** feature as the image bellow.



3. Configure the **Bing maps** control
   - Give a title such as **"Meeting Point First Day"**
   - Choose the meeting point location.



4. After choose a location, the **Bing maps** control asking you about the pin configuration. In this case maintain the default settings.



5. Save the page changes as draft.

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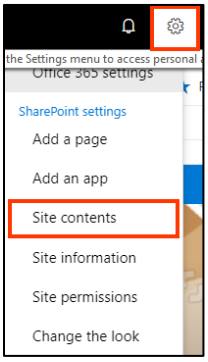
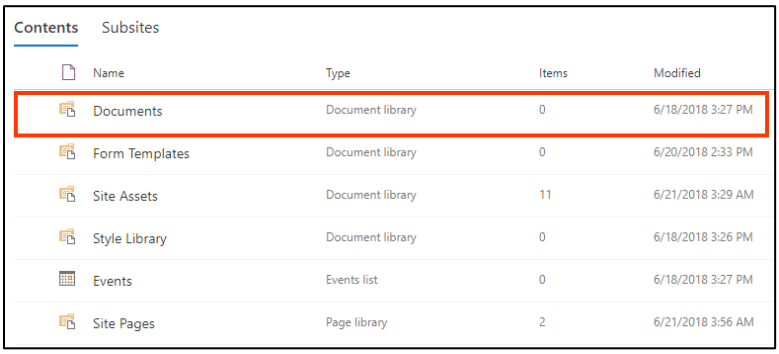
Task 6: Use a Document Library to list documents

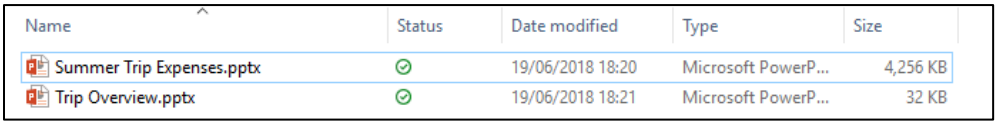
1. In the top right click to open settings menu to access personal and app settings and select the **"Site contents"**



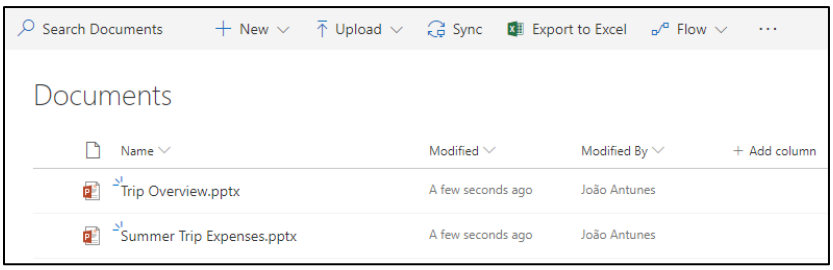
2. In the **Site content** page click to open the **Document library**



3. Browse to the location where you unzipped the data file (for example C:\JM\SharePointOnLabContent\) and navigate to resources folder



4. Drag and drop the files Into the **Document library**



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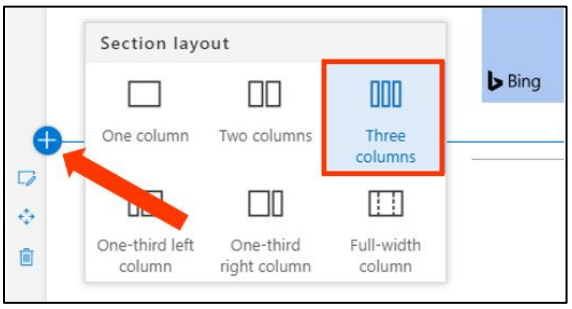
5. Back to **"Progam Overview"** page, lets insert a new control to list the documents which was added in the previous step.

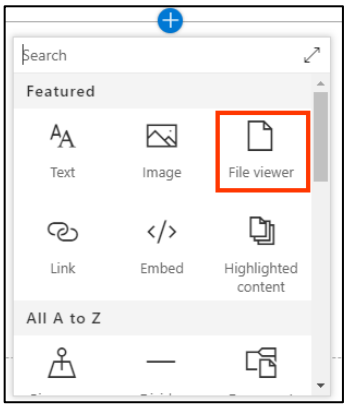
6. Start editing page.

7. Right below the previous added image select **+ (plus)** option to initialize a new section and then choose the **"Three columns"** option such as the following image.

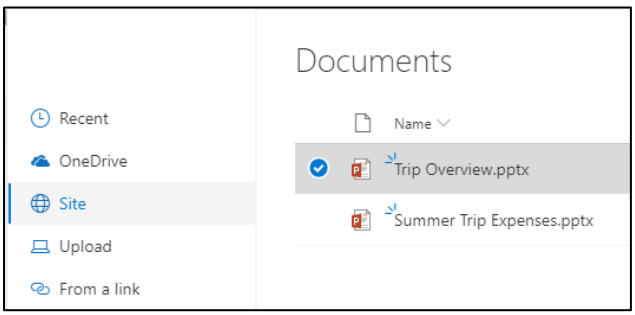


8. A new section with **Three columns** was added into the page content

9. In the **left column** select **+ (plus)** option, choose the **File viewer** feature



10. In the dialog select the **Site** option and then select a file into the **Document Library** and click **Open** button.



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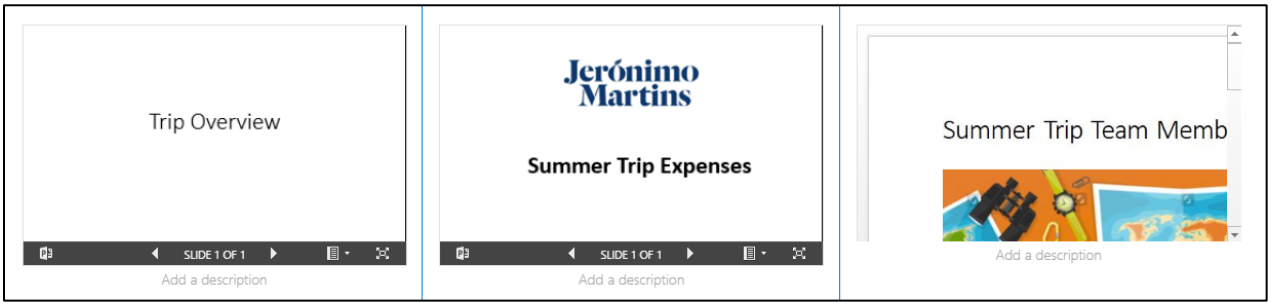
11. Apply this last two steps (10 and 11) for all columns into the section and also the documents in the resource folder.

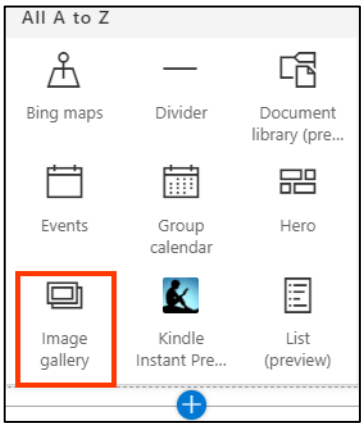


12. Save page changes as draft.

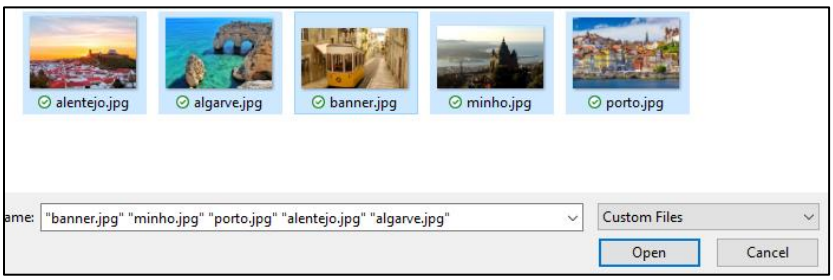
Task 7: Add images gallery

1. Start editing page.

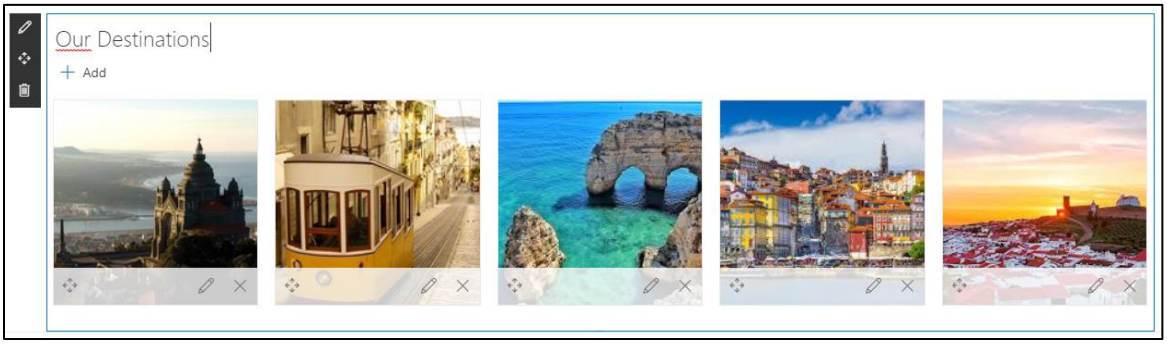
2. Add **Image Gallery** web part control to the page content



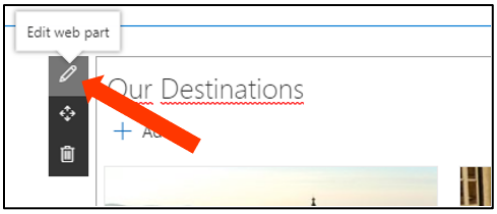
3. Choose **Upload** option in dialog and in the File Open dialog, browse to the location where you unzipped the data file (for example C:\JM\SharePointOnLabContent\) and navigate to gallery folder and select all images to load it



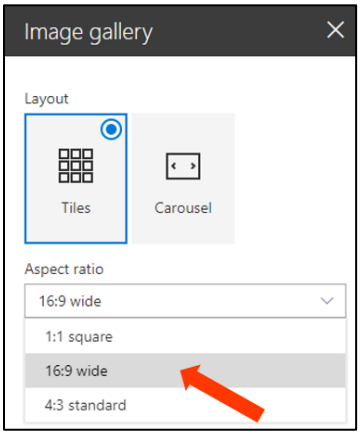
4. Click to **Add images** button and then add a title to web part control such as **"Our Destinations".**



5. Click to **Edit** the **Image Gallery** control



6. Change **Aspect Ratio** to **16:9 wide**



7. Save page changes as draft and click to publish

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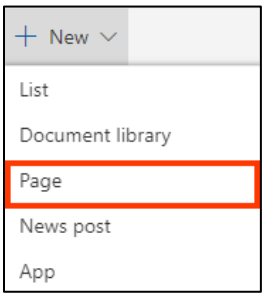
Exercise 3: Create a form to registration

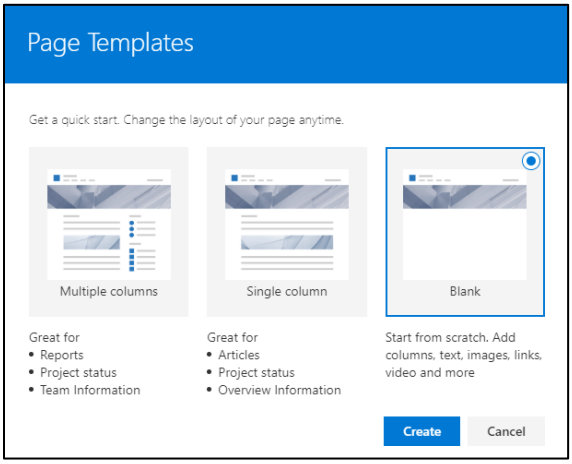
In this exercise, you will add a new page to the communication site for end users registration on the summer trip. Also using the Microsoft Forms to create a form as easy way.

Task 1: Add registration page

1. Select the **+ New** option and then choose the **Page** option



2. In the **Page Templates** dialog quick start select the **Blank** template and then click **Create** button to initialize a new page.

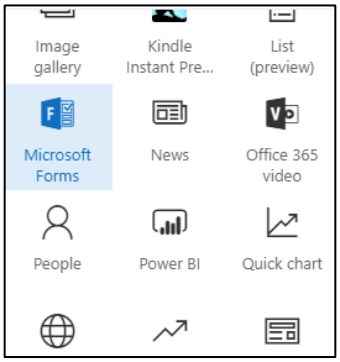


3. In the new page (notice that page is in editing mode) set title to **"Registration"**

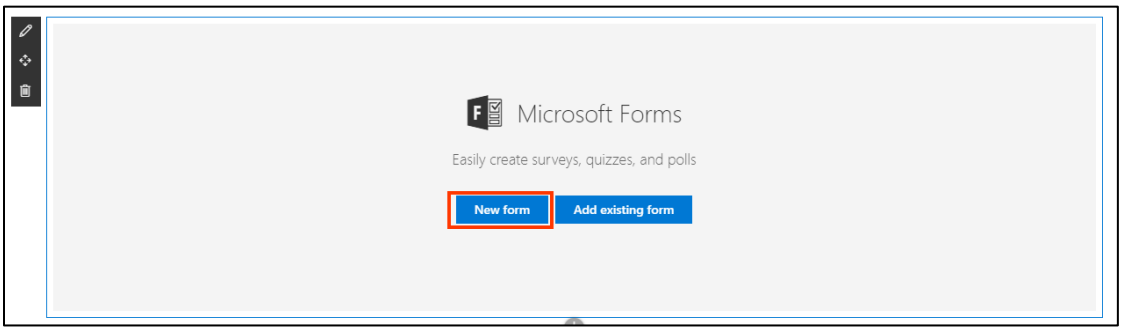
Task 2: Create form with Microsoft Form

1. Start editing page.

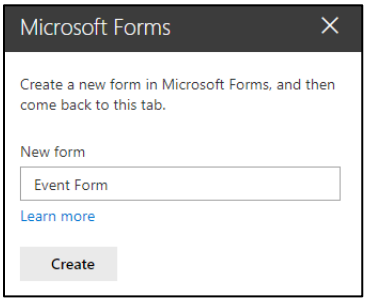
2. Into the page content area select **+ (plus)** icon to add a new web part in column one and choose the **Microsoft Forms** feature as the image bellow.



3. Click **New form** button to start a new form.



4. Add the form name **"Event Form"** and click to **Create.** This action will redirect the user to **Microsoft Forms** web portal.



5. In **Microsoft Forms** create your own form for subscription on the event with the following fields
   - First Name:
     - Text
     - Required

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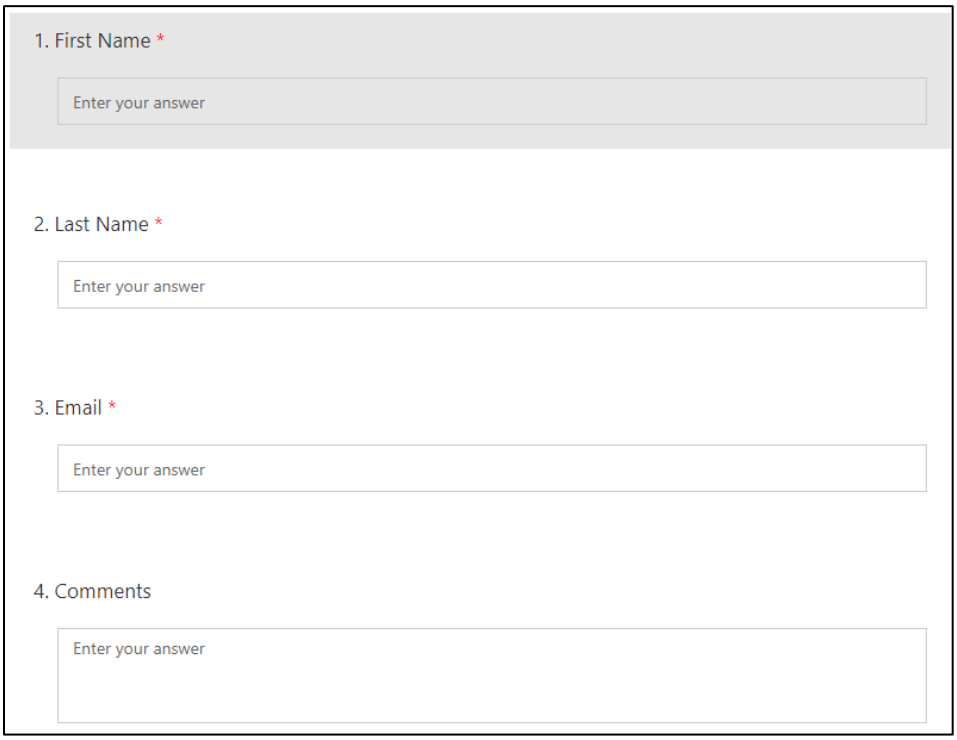
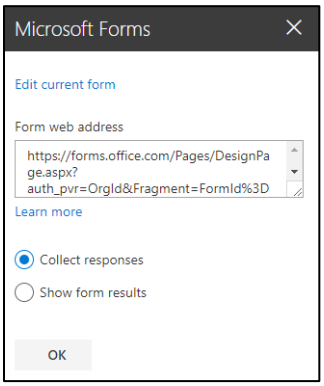
- Last Name:
  - Text
  - Required

- Email:
  - Text
  - Required

- Comments:
  - Text
  - Long answer



6. Back to the registration page and click **OK** button after finished form creation.

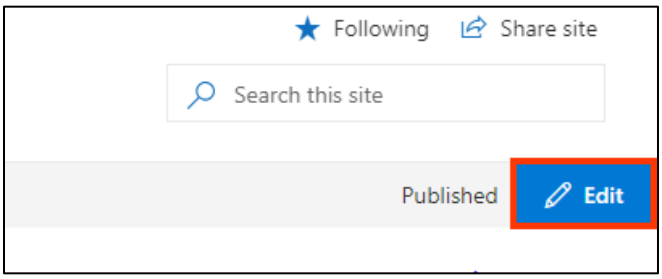


7. Save the page changes and click to publish

Task 3: Add navigation to registration page

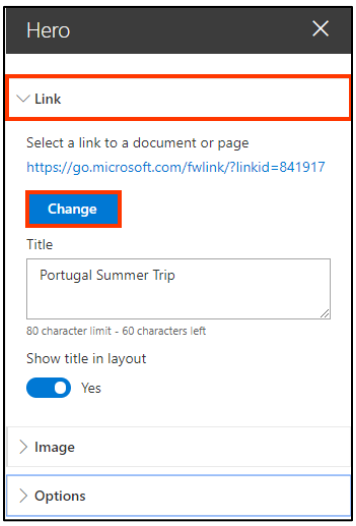
1. Go to the communication site home page.

2. In the site home page, click the **"Edit"** button.



3. Click to **Edit Hero** details (image banner)

4. In right panel, Hero detail, open the **Link** section and click to **Change**



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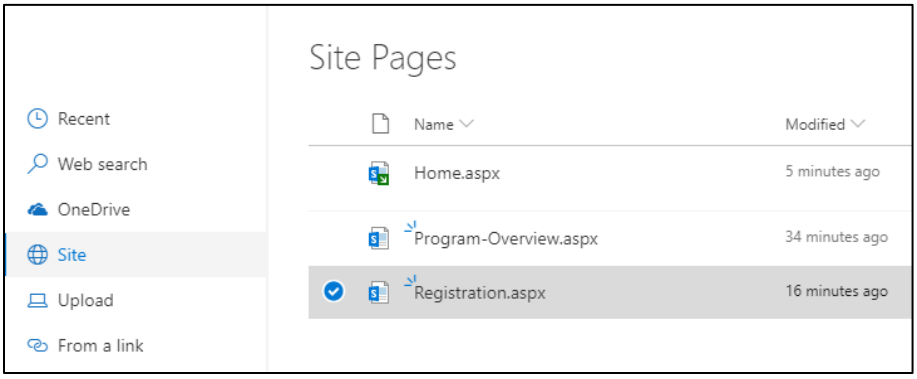
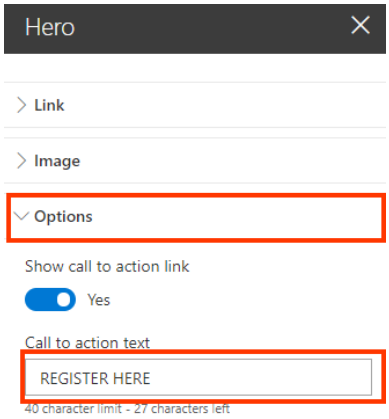
5. Select the **Registration** page and click **Open**



6. In right panel, Hero detail, open **Options** section and change the action text name to **"REGISTER HERE"** and close the panel

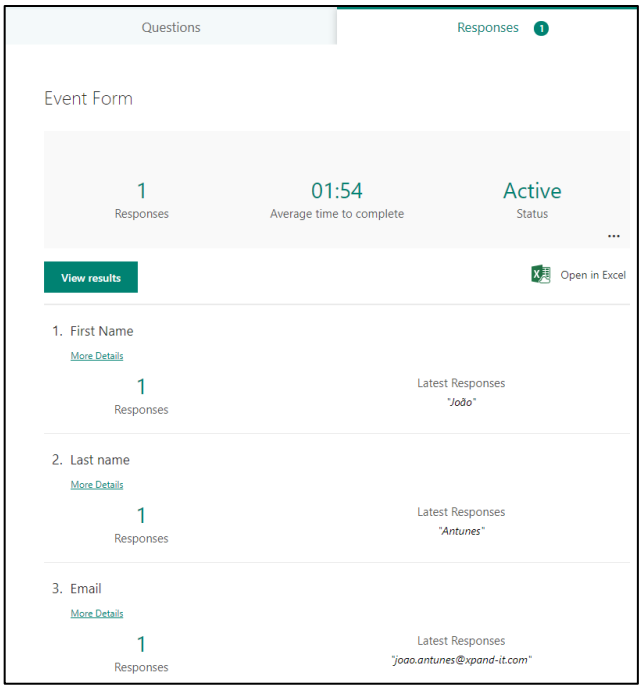


7. Save page changes and click to Publish

Task 4: Submit form and check results

8. Try to submit a form into the page

9. Go to form int the **Microsoft Form** (https://forms.office.com) portal and check the responses tab.



10. Click to "**Open in Excel**" and then you have the list of form submissions.

	A	B	C	D	E	F	G	H
1	Start time	Completion time	Email	Name	First Name	Last name	Email2	Comments
2	6/21/18 13:11:02	6/21/18 13:12:56	training@jmsharepointl	João Antunes	João	Antunes	joao.antunes@xpand-it.com	
3								

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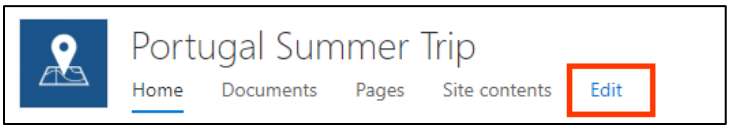
Exercise 4: Change navigation menu

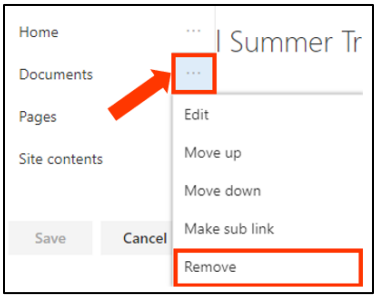
In this exercise, you will change the navigation menu

Task 1: Change navigation menu

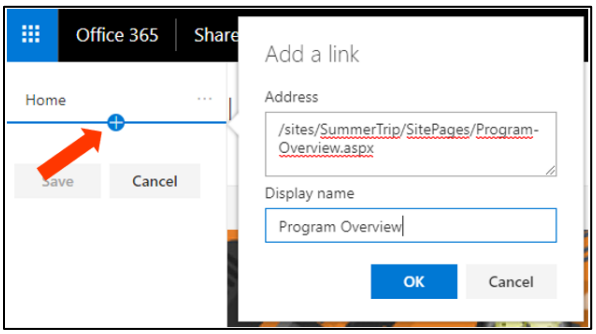
1. In the navigation menu click to **Edit**



2. In the left panel lets remove **Documents, Pages** and **Site contents** as well



3. Add a new link to navigation menu and set the **Address Link** and also a **Display name** as as the following images



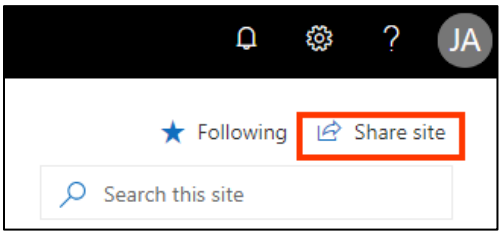
4. Click **Save**

Exercise 5: Set user permissions

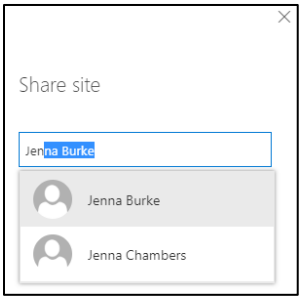
In this exercise, you will share this communication site with office 365 users or groups into the organization.

Task 1: Share communication site

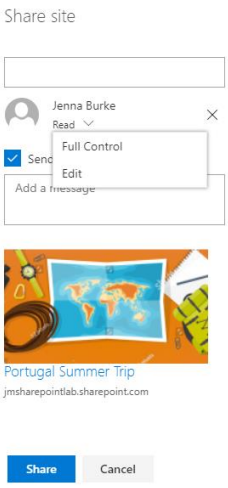
1. In the home page click to **Share** at top right



2. Search for user or group and select one



3. Set the user permissions and also personalize the invite email.



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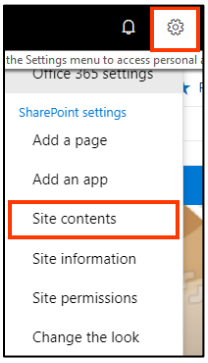
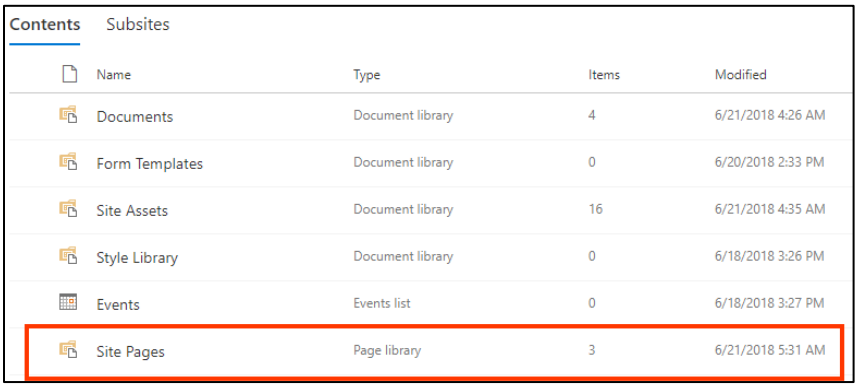
Exercise 6: Versioning

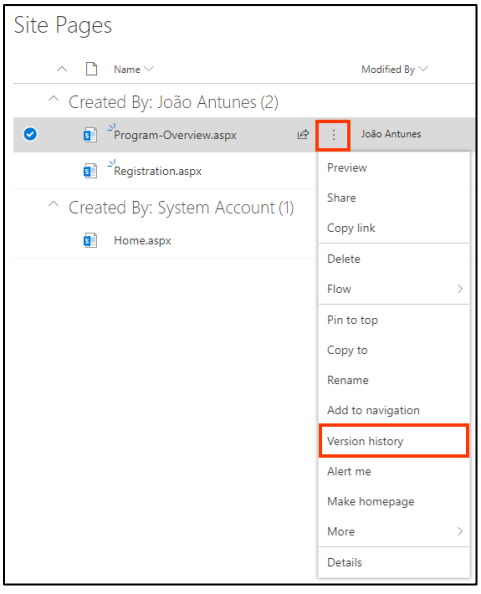
1. In the top right click to open settings menu to access personal and app settings and select the **"Site contents"**



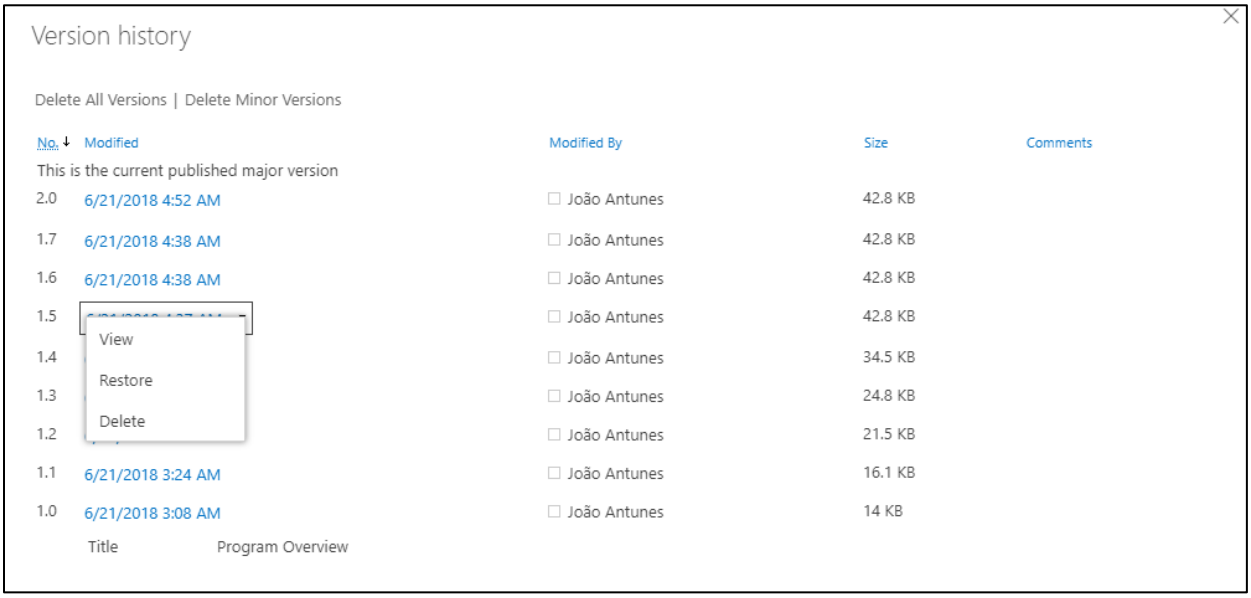
2. In the **Site content** page click to open the **Site pages**



3. In the **Site pages** click to **Show actions** icon for **Program Overview** page select **Version history** option

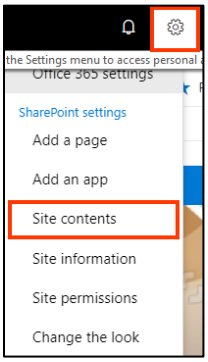


4. In the **Version history** dialog, you can select any version and choose one of those options that you can see on the following image

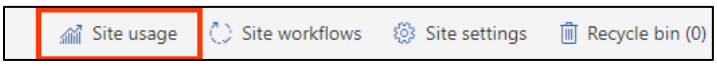


Exercise 7: Site usage

1. In the top right click to open settings menu to access personal and app settings and select the **"Site contents"**



2. In the **Site content** page click to open the **Site usage**



3. Display some metrics about the site visits

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1 Unique viewer
28 Site visits
2
1
0
6/15
6/16
6/17
6/18
6/19
6/20
6/21
Last 7 days
Last 30 days
Last 90 days