# Exercise 1 Team Site Navigation

***15 to 25 minutes***

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

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| 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. | |

# **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.

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| 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. | | E. | Click the **Yes**radio button to add **Calendar**to the site's **Quick Launch**menu and click the **Save**button.    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. | | 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. | | 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. | | E. | Click the **SHOW MORE**link in the form to open the view the additional task fields. | | 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.

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| 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 "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. | | F. | Enter "Model" for the **Column name**field and leave the default **Single line of text**as the data type for the column.    Take a few moments to read through the additional column settings, but the default values are fine for this exercise. | | 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**. | | D. | Click the **Title**column link to bring up the column settings page. Note how using this page you can change various settings of the column based on the data type of the column. | | E. | To rename this column, type over the text in the **Column name**field with the text "Make". | | F. | Click the **OK**button to save your changes and return to the list settings page. | | G. | Verify that the old column "Title" has been renamed to "Make" in the column group. | | 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. | |
| 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.    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:    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. | |

# **Exercise 4 Working with Team Site Libraries**

**5 to 10 minutes**

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

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 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.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 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. | | 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**. | |
| 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 on 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.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 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. | | 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." | | 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. | | 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. | |

# **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.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 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.    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 on 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 on 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.    Alternatively, you can use the **List**tab in the **List Tools**. There is a **Manage Views**group on the **Favourite 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.    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.    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.  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 on 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.

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| 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. | | D. | Click the **Standard View**format option link. | | E. | Enter "Really Fast" in the **View Name**field and leave the **View Audience**field set to **Create a Public View**. | | F. | In the **Columns**section of the **Create View**form, select only the following columns:   |  |  | | --- | --- | | **•** | **Make** | | **•** | **Model** | | **•** | **Top Speed** | | | 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. | | 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. | | 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. | |
| 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. | | C. | Click the **Standard View**format option link. | | 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**. | | F. | In the **Columns**section of the **Create View**form only select the following columns: | | A. | **Make** | | B. | **Model** | | C. | **Price** | | 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. | | 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. | |

# **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.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 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. | | D. | Scroll down and note the options available for permissions and navigation. Set Navigation Inheritance to **Yes**and click the **Create**button to complete the process. | | E. | You will automatically be navigated to the **Home**page of the new **Accounting**site. If you have not done much customization to the parent site it's hard to tell that this is a different site. | |
| 2. | Explore the content of the new child **Accounting**Team Site.   |  |  | | --- | --- | | A. | In the **Accounting**site, click the **Site Contents**link in the **Quick Launch**menu. | | B. | Take a few moments to look through the Lists and Libraries created by default from the **Team Site**template. | |
| 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.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 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. | | 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. | |
| 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. | | B. | Explore the Blog. | |

# **Exercise 11 Working with Wiki Pages**

**15 to 25 minutes**

In this exercise, you will add a new wiki page to the root parent site's **Site Pages**wiki library. You will explore the editing tools by editing and adding content to the new wiki page.

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| 1. | Create and edit a new page in the **Site Pages**library of your root parent site.   |  |  | | --- | --- | | A. | Make sure you are on the Home page of the root site. | | B. | Click the **Site Contents**link in the **Quick Launch**menu. | | C. | Click the **Site Pages**link on the **Site Contents**page.  The **Site Pages**is a wiki page library created by default when the Team Site was created. It is also where the sites default Home page is located. | | D. | Click the **New**link in the **Site Pages**library page. Choose **Wiki Page**. | | E. | In the **New Item**form, enter "NewCEO" in the **New page name**field. Click the **Create**button to complete the process. | | F. | Your browser will now be on the new blank page in edit mode. Take a few moments to familiarize yourself with the **FORMAT TEXT**and **INSERT**toolbars. | | G. | Enter the following text into the new page, each on a separate line:  New CEO of Contoso  Please Welcome Wilbur Whipple as the new CEO of Contoso.  Wilbur's achievements to date include:  Masters degree from NYU  Former CEO of Intel  Retired Marine Sergeant | | H. | Select and highlight the line "New CEO of Contoso" and click the **Heading 1**option from the **Styles**options in the **FORMAT TEXT**toolbar. | | I. | Select and highlight the three lines of Wilbur's achievements, Master's degree from NYU, Former CEO of Intel, and Retired Marine Sergeant. Click the **Bullets**button on the **FORMAT TEXT**toolbar in the **Paragraph**group. | | J. | Click the **Text Layout**drop-down button on the **FORMAT TEXT**toolbar in the **Layout**group. Select the **One column with sidebar**option. | | K. | Click in the upper-left corner of the new sidebar box to place your insertion bar at that point. | | L. | Click the **Picture**drop-down in the **INSERT**toolbar and select the **From Computer**option. | | M. | In the **Upload Image**dialog form, click the **Choose File**button. Navigate to the folder you downloaded the class files to and select the wilbur.jpg file or one of your images you wish to use. . Click the **OK**button to complete the file selection. | | N. | The final formatted version of the wiki page should look similar to the following image. Click the **PAGE**tab and then click the **Save**button to save your wiki page edits back to the **Site Pages**wiki library. | |
| 2. | Edit the Home page of **Marketing Site**and add a link to the new CEO wiki page.   |  |  | | --- | --- | | A. | Click the **Marketing**link in the **Top Link Bar**to navigate to the Home page of **Marketing**Site. | | B. | Click the **Edit**on the page tab to make changes to the page. | | C. | Click inside the Home page just below the paragraph to place your insertion bar at that point. Enter the following text at the insertion point:  Introducing the new CEO [[ | | D. | After you type the second square bracket, you will get a drop-down menu of available pages, select **NewCEO**from the drop-down link choices. | | E. | The two closing square brackets ]] should be added automatically for you. | | F. | The final text should look like the following with the page in **Edit**mode. | | G. | Click the **Save**button on the **FORMAT TEXT**tab toolbar to save your changes. | | H. | Note how the square bracketed text has become a link to the **NewCEO**wiki page you created earlier. | |

# **Exercise 12 Creating and Working with Content Types**

**10 to 15 minutes**

In this exercise, you will learn to create Content Types and Site Columns.

Additionally you will learn how to associate a document template with a content type based on the **Document**parent content type.

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| 1. | Create a new Content Type for the Sample Class Site.   |  |  | | --- | --- | | A. | Open your browser if it is not already open and navigate to your root team site. | | B. | Click the **Settings**menu and select the **Site Contents**link. | | C. | Click **Site Settings**. | | D. | Click the **Site content types**link within the **Web Designer Galleries**group. | | E. | Take a moment to read through the list of default content types. Note how they are grouped and there is a parent column that lists the parent content type of each individual content type. | | F. | Click the **Create**link at the top of the list of content types. | | G. | In the **New Site Content**form, use the following information to complete the form.   | **Field** | **Data** | | --- | --- | | Name: | Type "Employee Reviews" | | Description: | Type "custom content type for employee reviews" | | Select parent content type from: | Select **Document Content Types** | | Parent Content Type: | Select **Document** | | Choose group: | Type "Custom Content Types" |   The completed form should look similar to the following image. Click the **OK**button to complete the new content type creation process. | |
| 2. | Add columns to the new **Employee Reviews**content type.   |  |  | | --- | --- | | A. | Click the **Add from existing site columns**link below the **Columns**region on the **Site Content Type Information**page. | | B. | In the **Add Columns to Content Type**form, select **Core Contact and Calendar Columns**in the **Select columns from**drop-down box. From the **Available columns**list box, choose both **Full Name**and **Job Title**then click the **Add**button to add them to the **Columns to add**list box. Click the **OK**button to complete adding the site columns to the **Employee Reviews**content type. | |
| 3. | Assign a document template to the new **Employee Reviews**content type.   |  |  | | --- | --- | | A. | Click the **Advanced settings**link under the **Settings**region on the **Employee Reviews**content type information page. | | B. | Click the **Upload a new document template**option on the **Advanced Settings**page and then click the **Choose File**button to find the file. | | C. | Navigate to the folder you downloaded the class files to and select the Emp\_Review.docx file. You may also choose a file on your computer instead. Click the **Open**button to complete the file selection. | | D. | Click the **OK**button on the **Advanced Settings**page to save your changes to the **Employee Reviews**content type. NOTE: You may receive an error due to permissions and you may skip this step of adding a template. | |

# **Exercise 13 Adding a Content Type to a Library**

**10 to 15 minutes**

In this exercise, you will learn to associate the custom content type you built in the previous exercise with the Document Library.

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| --- | --- |
| 1. | Click on the new **Documents**document library. |
| 2. | Click the **Library Settings**on the **Settings**. |
| 3. | Click the **Advanced Settings**link on the **Document Library Settings**page in the **General Settings**region. NOTE: This step may not be needed if you had previously performed this task. Skip to step 6. |
| 4. | Click the **Yes**option under the label **Allow management of content types?**and then click the **OK**button at the bottom of the page to save the change. |
| 5. | You should now see a **Content Types**region that was not being displayed before you made the change in the previous step. |
| 6. | Click the **Add from existing site content types**link at the bottom of the **Content Types**region. |
| 7. | In the **Add Content Types**form, select **Custom Content Type**in the drop-down box labeled **Select site content types from**. Select **Employee Review**in the list box labeled **Available Site Content Types**and click the **Add**button to move it to the list box labeled **Content types to add**. Click the **OK**button to save your changes. |
| 8. | Add a new document to the **Document**library based on the **Employee Review**content type.   |  |  | | --- | --- | | A. | Click the **Document**link in either the **Quick Launch**menu or the Site's **Breadcrumbs**to take you to the **Browse**view of the **Documents**library. | | B. | Click the **New**to open the list and choose the **Work Orders**option. | | C. | **Microsoft Word Online**will open a new document based on the template we loaded into the **Employee Reviews**content type. NOTE: If you were unable to upload a template due to permissions, your page will be blank. | |

# **Exercise 14 Outlook Integration**

**15 to 25 minutes**

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

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| 1. | Create an alert for the **Favorite Cars List**list.   |  |  | | --- | --- | | A. | Open your browser if it is not already open and navigate to your root team site. | | B. | Click the **Favorite Cars List**link in the **Quick Launch**menu to navigate to the list. You may also open this list from **Site Contents**. | | C. | Click the **Alert Me**in the **more**drop-down. | | D. | Leave all the default options in the **Favorite Cars - New Alert**dialog form and click the **OK**button to save the new alert. | |
| 2. | Add a new **Favorite Cars list**item to the list to test the new alert.   |  |  | | --- | --- | | A. | Click the **new**link at the top of the list. Enter sample data and click on the **Save**button. | |
| 3. | Check for an alert in Microsoft Outlook Online.   |  |  | | --- | --- | | A. | Launch Microsoft Outlook Online. | | B. | You will eventually have two emails in your **Inbox**generated by the alert system. It could take up to 10 minutes for them to appear due to a delay in the SharePoint service responsible for generating emails even with the alert option set to **Send notification immediately**. | |

# **Exercise 15 Working with SharePoint Permissions**

**15 to 25 minutes**

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

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| --- | --- |
| 1. | Make sure your browser is open to the **Accounting**site. |
| 2. | Click the **Settings**link and then select the **Site settings**link from the available options. |
| 3. | Click the **Site permissions**link on the **Site Settings**page. |
| 4. | Click the **Grant Permission**link button from the **PERMISSIONS**tab toolbar. |
| 5. | Enter the name of a co-worker in the **Invite people**field and click the **SHOW OPTIONS**link. |
| 6. | Change the **Select a group or permission level**drop-down option to **<<Site Name>> Members [Edit]**and uncheck the **Send an email invitation**option. Click the **Share**button to complete the action. |