

SharePoint Online



Table of Contents

- Section 1 – Course Introduction 5**
 - Course Introduction 5**
 - Creating a Practice Site 7**
- Section 2 – Why Use SharePoint 8**
 - Why Use SharePoint 8**
 - Assessing a SharePoint Site 10**
 - The SharePoint Interface 12**
 - SharePoint Roles and Permissions 15**
- Section 3 – Working With Lists 16**
 - Working With Lists 16**
 - Creating a Task List 19**
 - Adding Items and Modifying Lists 22**
 - Deleting List Items 24**
 - Sorting and Filtering Lists 26**
 - List Views 28**
 - Creating and Modifying List Views 30**
 - Creating Custom Lists 34**
 - Important List Data from Excel 36**
- Section 4 – Creating a Document Library 38**
 - Creating a Document Library 38**
 - Uploading Documents 41**
 - Modifying and Editing Documents 43**
 - Metadata 45**
 - Creating Custom Library Views 47**
 - Version Control 49**

Section 5 – SharePoint Notifications	51
SharePoint Notifications	51
Creating a Discussion Board	54
Exporting Lists to Excel	56
Connecting SharePoint to Outlook	59
Section 6 – Workflows Explained	61
Workflows Explained	61
Triggering a Manual Workflow	63
Creating Automated Workflows	67
Section 7 – SharePoint Webpages Explained	70
SharePoint Webpages Explained	70
Working with the Wiki	71
Adding Content to a Web Page	73
App Parts	75
Web Parts	77
Adding Other Content	79
Section 8 – Editing the Navigation Menu	81
Editing the Navigation Menu	81
Creating Links	85
Adding Hyperlinks	86
Section 9 – SharePoint Permissions	88
SharePoint Permissions	88
Managing Permission Groups	90
Section 10 – Site Collections	92
Site Collections	92
Creating a Subsite	93

Changing the Look and Feel	95
Section 11 – An Example of a Communication Site.....	97
An Example of a Communication Site.....	97
Course Close	99
Creating a Communication Site	100
Uploading Documents to the Document Library	102
Creating a Picture Library	104
Importing List and Alert me.....	106
Creating a Discussion Board	108
Adding Web Pages.....	109
Assembling a Wiki Page.....	111
Adding News Items	113
Adding YouTube Videos.....	115
Adding a Twitter Feed.....	117
Adding and Formatting Text.....	118
Displaying Links as Buttons and Lists.....	120
Adding Weather and World Clock	123
Finishing Touches	124
Section 12 – Course Close	126
Course Close	126

Section 1 – Course Introduction

Video: Course Introduction

Deb: Hello everyone and welcome to this course on SharePoint Online. My name is Deb Ashby and I'm an IT trainer, specializing in Microsoft products. And I'm going to be your host for this course, guiding you through how to become more productive and more efficient when using SharePoint.

We'll start by discussing what exactly SharePoint is and why it's useful. I'll show you how you can access SharePoint. And we'll explore the SharePoint Interface and Navigation. We'll end this introductory section by speaking briefly about SharePoint Roles and Permissions. The next two sections will dedicate to SharePoint Lists and SharePoint Libraries. Pretty much everything in SharePoint is essentially a List. So understanding how to create, manage, and edit Lists and Libraries is an essential SharePoint skill.

Next, we'll learn how to expand SharePoint content by connecting to other applications like Outlook and File Explorer. We'll also take a look at SharePoint Notifications and how to create a Discussion Board. We'll then move on to learning how we can become more efficient by automating Workflows. And I'm going to show you an example of how to create an Approval Workflow within SharePoint.

We'll also learn how to use SharePoint as an intranet Site by creating Web Pages that contain web and app parts and other types of content. We'll then go back to taking a deeper dive into the topic of Roles and Permissions, and how you can manage access to a SharePoint Site. And in the final section, we'll talk about Site collections, Subsites and take a look at how we can customize the overall look and feel of the Site using Themes in Site Settings.

Now, just a couple of things to mention before we begin. SharePoint is an online application. And so, there are no downloadable course or exercise files to follow. Instead, in the last lesson of this section, I'm going to walk you through how to create a Practice SharePoint Site so you can follow along with me. Alternatively, if you already have a Practice or Test Site of your own, please feel free to use that one.

I'm going to be using the Online version of SharePoint through Microsoft 365, as opposed to the enterprise Desktop version. And finally, there are two ways to view a SharePoint Site, the Classic Experience or the Modern Experience. Now the Classic Experience used to be the only way to view a SharePoint Site. But more recently, Microsoft has introduced the Modern Experience, which is faster, has more features, and works better across different devices. And what I'm talking about here is basically the way that the Site looks, and the way that it functions.

Now, both the Classic and the Modern Experience are available in SharePoint, which can be a little bit confusing, and you'll notice that some of the pages default to Classic layout and some to Modern. Now, the majority of this course will be demonstrated using the Modern Experience.

SharePoint Online

So, if you are working through this with me and you find that your pages look a little bit different to mine, it is worth checking what Experience you're using in your Settings.

So, with all of that said we have lots to cover. So, grab yourselves a drink, and I will see you over in the next lesson.

Video: Creating a Practice Site

Deb: As I mentioned in the introduction, there are no actual downloadable course or exercise files for SharePoint Online. And that's because we are going to be doing all of the work in a browser.

Now, if you're happy just to sit back and watch the videos, then that is absolutely fine. But if you are someone who learns better with a more hands-on approach, and you'd like to follow along with me, then the way to do that would be to create your own Practice Site. Now, if you already have access to SharePoint, and you have access to a Test Site or a Practice Site, then please feel free to use that. But if you don't, I'm going to show you in this lesson, how you can very quickly just create a little Practice Site.

Now we are essentially skipping a little bit ahead here because I haven't even really introduced SharePoint to you yet. And already, we're straight into it, creating a new Site. So if you feel you would prefer to maybe work through the first section of this course, and then come back and create the Practice Site, then again, please feel free to do that.

Now, I'm currently in my SharePoint Team Site. And this is essentially my start page. And it's from this page that we can create ourselves a brand new Site. So to do that, all you need to do is go up to this Create Site button in the top left-hand corner. Let's click it, and then we can choose what type of Site we'd like to create. Now, I don't want to delve too much into this at this early stage, I really just want you to get up and running with a Practice Site. So the one that I'd like you to select here is Team Site.

Now you need to give your Site a name, and I don't mind what you name it, you can name it whatever you like, just something that you're gonna be able to identify easily. So you might want to do something like your initials, and then maybe Practice Sites. And the only other thing I really want you to check on this page at this stage is the Privacy Settings. So for this one, I'd like you to set it to Private, and then click on Next.

Now, I don't want you to add any additional owners or any members of your Site at this stage. So, I'm happy for you just to click Finish. And there we go. It is as simple as that. So now that you've created your own Practice Site, you can follow along with me and replicate what I'm doing on your own Test Site.

Section 2 – Why Use SharePoint

Video: Why Use SharePoint

Deb: Before we start to explore the question of why use SharePoint, it's really important to get a good understanding of how information is shared. Because, there are going to be many occasions where you want to share things with your boss or maybe your co-workers or even clients. So historically, how have we done that?

Well, there are many different methods that we can use to share files; we could use a Network Drive. So it might be that you work at a company that maybe has a dedicated drive, it's probably labeled something like the O drive, or the end drive that all of your company or maybe even just your team have access to. And you can upload files to your Network Drive and share them with your colleagues.

We can also share information and content via Messenger. So these days, most people are using some kind of messaging system, particularly in their workplace, maybe something like Microsoft Teams, or Slack. And if you've used any of those applications, you'll know that we can share conversations, we can share files, we can even share our screens, our desktops, specific applications, or even whiteboards. So these days Messenger is a really popular method to use to share information.

We could even share information via Email. And I would say that a few years ago, this was probably the default for most people if you wanted to share maybe a Word document with your colleagues. You can attach that Word document to an Email and send it off. Now whilst Email is straightforward and very simple, it can cause you problems. If you send a document out to 30 different people, they're essentially working on 30 different copies of that attachment. And then when they send that back to you, you then have to manage all of those different versions. So, just bear that in mind if you want to share files via Email.

In more recent times, Cloud Services have become extremely popular. So something like OneDrive or Google Drive, where you can upload your files to the Cloud and invite people to that particular folder so that they can view those files as well.

And then finally, we have things like Removable Storage devices. So things like USB sticks or external hard drives. This is a more physical way of sharing files. We can upload files to a USB stick, and then we can pull that USB stick out of our computer, walk down the hallway, and plug it into somebody else's computer, and they can then see those files contained on that Removable Storage.

Now all of these methods are completely valid. And if you already use some of these, that's absolutely fine. Well, with all this in mind, let's now take a look at why SharePoint might be a good alternative. Now the main advantage with SharePoint is that everything is in one place. So if you're looking for a particular file, you don't need to hunt around in a Network Drive, or even

hunt through your Emails to find that particular file. Everything is accessible within SharePoint, which makes you a lot more efficient.

SharePoint contains Document Libraries for documents storage, you can create Task Lists, you can access a calendar, you can even do things like automate Workflows to streamline your daily tasks. And if you have things that need to be approved, so maybe a holiday request or a client document, you can set that up in SharePoint as well to automate that approval process. And one of the greatest advantages of using SharePoint is that it is a Permission-based application.

So, you can assign users to different groups and control their level of access to different parts of your SharePoint Site. So as we go through this course, I'm going to show you how you can use SharePoint to make yourself more efficient, make data more accessible, and cut down on the amount of clutter you're having to deal with throughout the day.

Video: Assessing a SharePoint Site

Deb: Essentially, SharePoint is a web-based application. Now there is also a Desktop version of SharePoint. So, much like an application like Microsoft Teams where you can access it via the web browser through your Microsoft 365 subscription, you can also download the Desktop app.

Now throughout this course, I'm going to be using the web browser version. But I will say that if you are coming to this course, and you are using the Desktop version of SharePoint, you can still follow through this course, because both versions are extremely similar.

Now, if this is all completely new to you, and you are a bit confused as to how to access SharePoint, there are a couple of different ways. Now currently, on the screen, I am logged in to my SharePoint Online Training Site for a fictional company called GlobalTeach. And currently, I'm on the homepage for this Site. And if you take a look up in the URL, you can see there the direct link to my SharePoint Site.

So, it might be that somebody has sent this direct link to you via an Email or a Messenger system, and all you need to do is click on it. And it's going to give you direct access to that SharePoint Online Training Site, provided you have all of the relevant Permissions and you're able to access the Site. It might be that when you click on the link that you've been sent, it's going to ask you to log into your Microsoft 365 account. All you need to do is pop in your username and your password, and then it's going to jump you to the same page that you see here.

Now, if you haven't been sent a direct link to a specific SharePoint Site, and you just want to jump in there and have a little look around, you can access that from your Microsoft 365 portal. So, let me show you how you can do that. I'm going to close down this tab for one second, and go back to my main office portal. And I got here simply by going to the URL office.com, typing in my Microsoft 365 username, which is usually your Email address, and my password, and then it's going to take you straight to this screen.

Now what you'll see here, if you cast your eyes over to the left-hand side is we have a big long list of different applications. And again, yours might not look exactly the same as mine. What applications you have access to are very much determined by the type of subscription that you have. And just for reference, I'm using a Microsoft 365 Business Standard account throughout this course. So if I want to get to SharePoint from here, I can look through my icons, I can see yep, there we go, there is my SharePoint icon.

If I'm still not 100% sure, I can click the app launcher at the top here, and that makes it a little bit clearer as to where I need to go. So let's just click on SharePoint, and it's going to jump me straight into my SharePoint Home screen. And from here, I can see things like the frequent Sites that I've used, any that I'm following, and I can also create a brand new Site from here as well.

Now as we go through this course, I'm going to be using a Site that I've already created. And if you want to follow along with me, it might be that you have a SharePoint Site already that you can play around with and try things out on. If not, I would suggest you just create your own little

Practice Site. And if you can't remember how to do that, I explained it in the introduction section of this course.

Now a final little tip, before we dive into really having a good play around with SharePoint is the browser that you're using. Now, remember, SharePoint after all, is a Microsoft tool. And so Microsoft tend to like you to use one of their browsers. Now, it might be that you still use Internet Explorer, so that's fine. I'm actually using Microsoft Edge, which is the latest version of their browser to work in SharePoint.

If you don't have either of these browsers, and you're using something like Google Chrome or maybe Firefox or Mozilla, that's absolutely fine, you're probably not going to have too many problems. But I will say that for some things, the Site does tend to function a little bit better if you're using a Microsoft browser. So, that might just be something to bear in mind if you're trying to choose between many different browsers.

But as far as accessing your SharePoint Site, that is pretty much it. It is very, very simple. We're going to move on next to familiarizing ourselves with the SharePoint Interface, and then we're going to start using some of the functionality.

Video: The SharePoint Interface

Deb: Let's start out by familiarizing ourselves with the SharePoint Interface. And we're going to learn how to navigate. And also learn some of the key words to identify different elements. And it is super important that you become comfortable navigating around your SharePoint Site.

Now, once again, I'm using the Online version of SharePoint. And when you first jump into SharePoint, maybe from your Microsoft 365 Home screen, it's going to take you to a page that looks like this. Now, currently, I'm not actually in my SharePoint Site. This is kind of a hub where I can see an overview of all of my Sites or any Sites that I'm following, so Sites that I'm interested in. And you can see on the left-hand side, I'm following the Site that we're going to be using right at the top here just to make it easy to access. And then underneath I have some Recent Sites that I've also accessed.

Now we're going to come back to this screen many times throughout this training course. So, let's just very quickly dive in to the Site that we're going to be using, because this is the page that I want you to get familiar with. Now running across the top, we have SharePoint, and then we have a Search this Site area at the top. And again, we're going to look at this more when we take a look at searching for different documents and things within SharePoint. But that's basically a universal search, that's going to help you find your content.

Over on the right-hand side of this top bar, we have a little cog icon, which is where you'll find all of your Settings for your Site, a Help icon, and then we have my little profile photo up there. Underneath that, we have the Site header. And this Site header, in general contains the title of your Site or whatever you've chosen to name it, in this case, SharePoint Online Training. And it also contains a logo if you've uploaded one.

And you can see there I've created a very quick, very basic little logo. I just did it in PowerPoint and uploaded it to the Site. I can see that this is a Public Site. And when you create a Site, you can choose to create a Private Site that just certain people have access to or a Public Site that everyone in your organization can access. And then all the way over on the right-hand side, I can see that I am following this Site so any updates I'm going to be able to see. And I can also see that this Site has three members.

Now all the way over on the left-hand side, I have some icons. And again, this just helps me to navigate. So if I want to go back to the SharePoint Start page, I can click the little home icon. And it's going to take me back to that kind of main hub where I can dive in and dive out of various different Sites. Underneath, I have a My Sites icon. And this is going to show all of the Sites that I've created, I have a My News area. And we're going to talk a lot about news later on this course. But you can see here I've actually posted a news articles so I can see that listed underneath My News.

And then finally we have a My Files area. So these are generally files that I've uploaded or shared within my SharePoint Site. Now, in addition to these little icons, we have the Quick Launch Bar, which is very much related to just this SharePoint Site. Now your Quick Launch

Menu bar is probably not going to look exactly the same as mine. I've added a few things into here. So you're not going to see any of this section down here where it says GlobalTeach, Contacts, Tasks, Issues, and Calendar, but you should have everything else. And this Quick Launch Bar can be customized, you can see that we have an Edit button at the bottom. So you can add links to different things within your SharePoint Site to this menu to make it super easy to access them. And this Quick Launch Bar is really where you go to access the different parts of your SharePoint Site.

And what you'll start to notice is that things within SharePoint are very much integrated with other applications within Microsoft 365. So for example, if I click Conversations, you'll see that this is going to essentially jump me across to Outlook. Because when I created this SharePoint Site, it also created a Group for this Site within Outlook. And if I scroll all the way down to the bottom, you can see here under Groups, there is the name of my SharePoint Site, SharePoint Online Training, we've got the three members, and I can now do things like send Emails, I can start conversations from within Outlook, which are going to update in SharePoint as well.

You'll see also there is some integration with Microsoft Teams here as well. And then we have things like Documents, Notebook, which allows us to create a shared OneNote Notebook for all of our notes related to this particular project. We can access our Pages and then at the bottom underneath all of these GlobalTeach Lists, we have a Site Contents button. If I just click on Site Contents, this is basically where you can find everything related to your Site.

So every time you create a List, you'll find in here, you can find your Documents in here as well, all of your Site Assets and Site pages. So if you're ever struggling to find something in SharePoint, then Site contents is a great place to go.

Now I'm going to delve more into these different parts of a SharePoint Site as we go through the course. But for the time being, let's just focus a little bit more on some of the navigational elements that we have on this page. So we've seen our little Menu of icons on the left-hand side, we've seen our Quick Launch Bar, which we can edit using the link at the bottom, we also have another little menu running across the top. And the first item that we have here is the New button.

So if you want to create a new List, a new Document Library, maybe a new Page, or if you want to create a News Post, or a News Link, or even some kind of plan, then you can jump into this New button. It's a really quick way of doing that. And of course, we're going to be using this button throughout this course.

We then have a Page Details button, which is just going to give us a little bit more information about the Page that we're currently clicked on. And also an Analytics buttons. So you can see some data related to that page. Such as things like Page Viewers, Page Views, Average Time Spent, things like that. So if that's of interest to you, then it's extremely easy to access.

You can also see over on the right-hand side, I have a Date here when this page was last published, and then we have an Edit link. So of course, everything on this homepage can be edited. So maybe you don't like the layout, maybe you want to display your Document Library at

the top here so it's the first thing people see as opposed to News, you can change all of that, including the look and feel of your entire Site.

And right in the middle here, of course, this is the main body of the page. And this page contains numerous different web parts. And this page is going to change depending on what it is you're doing and where you're clicked. So currently, I'm clicked on Home. So I'm seeing all of these different web parts for News, Quick Links, Activities, I've got my Document Library there. But if I was to select something else from the Quick Launch Menu on the left-hand side, so let's say Documents, you can see now I'm just seeing the documents that have been uploaded or shared within my SharePoint Site.

Now one thing you need to be aware of is that when you go into a different part of your SharePoint Site, so I'm in Documents right now, the menu bar running across the top is going to change. It's very much contextual to what you're currently clicked on. So because I'm clicked in Documents, so I'm looking at my Document Library, if I select the New drop down, it now allows me to create a new folder, or a different style of document, maybe a Word document, Excel, PowerPoint, whatever I like.

I can upload files directly from my PC to this Document Library, I can edit in Grid View, I can export all the details out to Excel, so on and so forth. So the main point I'm trying to make here is that that menu bar at the top is going to change depending on where you're clicked in your SharePoint Site. And all the options that you get in that menu are going to be very much related to the part of the Site that you're clicked in. Makes logical sense to me.

Now, of course, if you ever just want to jump back to the homepage of your Site, you can click on the Home link in the Quick Launch Menu bar. And that's going to take you back to Home. And if you want to jump into a completely different Site, remember, if you go to the icons that we have all the way on the left-hand side, you can jump back to the SharePoint Start page and dive in to a completely different Site.

So, that is a quick run through of the basic navigation of the SharePoint Site. I would say that if you're used to working with websites, this probably isn't going to be rocket science to you. But it's good to have an understanding as it is the foundation of everything that we're going to do.

Video: SharePoint Roles and Permissions

Deb: One of the biggest selling points of SharePoint is its Permissions. To gain access to a Site, you have to be given Permission to do so. So you need to be invited by the owner of the Site, and then you're assigned a Permission level. And there are three different Permission levels or Groups in SharePoint. The top level is Owners, and this gives you full control.

So if you create the Site yourself, then in general, you're going to be assigned the Owner Permission level by default. And it gives you complete control over absolutely everything in your SharePoint Site. So you can create new Lists and Libraries, you can work with all of the content, and you can even delete things. You could delete the entire Site if you wanted to. And of course, I would say with that, proceed with caution.

The next level down and you will find that this is what most people who join your Site are assigned is the Members level. So these people are contributors to the Site. So it means that they can work with the content, they can upload, and they can edit items. Members can also create new Lists and Libraries, but they don't have the overall full control that an Owner has. So, a member wouldn't be able to delete items and delete the entire Site.

The final Permission level is Visitors. And, Visitors have read-only access to the Site. So they can do things like look at the content, they can look at Tasks or the Calendar or even Documents, but they can't actually edit anything or delete anything. So when you invite people to your Site, then you can assign them one of these three default Permission Groups.

Now, of course, you can go a stage further and create your own groups. And also if you wanted to, you could modify these default groups potentially. I'm going to delve more into Permissions a bit later on in the course. But in general, this is one of the big selling points of SharePoint. You can essentially lock your content down and assign Permission levels to different groups of people.

Section 3 – Working With Lists

Video: Working With Lists

Deb: Lists are something that you're going to use all the time in SharePoint. So in this section, we're really going to focus in on them and understand what they are, why we need them, and take a look at the different types of Lists that we can create. So let's first answer the burning question, what exactly is a SharePoint List?

Well, the way that I like to think about it is basically everything you work with in SharePoint is really a List. So if we just forget about SharePoint for one moment, and just talk about Lists in general. Now, it's probably the case that you're already familiar with Lists in other applications, for example, Microsoft Excel.

Now as we know Excel is used for many, many different things. But essentially, what you're doing when you're working in Excel is you're managing rows of Records, lists of information. And the general structure of a List is something that contains Column Headers at the top, and then with the respective Records or Items listed out underneath. But this, what you see in front of you right now is basically just a List of information. And that's basically all SharePoint Lists are.

So if you can imagine for one moment, taking this content from Excel and copying and pasting it into SharePoint, you would have yourself a SharePoint List. So let's now jump back into SharePoint and open up a List that I've already created so that you can see the difference. Now, I've created a few different Lists in my SharePoint Team Site. But let's jump in and open up my GlobalTeach Contacts. And you can see that I have a link for this in the Quick Launch Menu on the left-hand side. So let's click and take a look.

Now I have a few different Contacts already added to my Training Contacts List. And as you can probably see, these are not real people. But they do give you a little bit of insight as to what my favorite TV show is. And what can we see in here? Well, we can see those Column Headers. So running across the top, I have Attachments, Last Name, First Name, Company, so on and so forth. And then underneath that I have my Records. So this is essentially very similar to the Excel spreadsheet that we were just looking at in its layout.

So now that we understand what a SharePoint List is, let's look at a few other examples of different Lists. Because there are many different types of Lists that you can create in SharePoint. So this one is a Basic Contacts List. But I also have some others that I've created. So what about this one here, GlobalTeach Tasks. Now, the first thing you'll notice when I come in here is that my view has changed.

So as I mentioned at the beginning, you have that Modern Experience and the Classic Experience, and we're kind of in that phase where Microsoft are trying to move people away from the Classic Experience and towards the Modern Experience.

Now I have my Settings set up to use the best experience for the particular page that I'm working on. And this time, it's defaulted to the Classic Experience, which is why the interface does look very slightly different to the Modern Experience. But we can still see our List. So this one is a Task List. And these are a couple of Tasks that are currently assigned to me that I need to do. So I need to create a course outline for SharePoint Online. And I also need to research the SharePoint updates to add those into the course. I can see that both of these Tasks have a due date. And then I have some links at the top where I can add a new Task or edit the existing Tasks.

But again, this has the same structure. It has those Column Headings at the top, so Task Name, Due Date, Assigned To, and then we have our Records in rows underneath. Let's take a look at another example of a List. I'm going to go to my Quick Launch Menu, and this time, we're going to take a look at GlobalTeach Issues. This one has defaulted back to the Modern Experience. And we have another List, but it has a completely different look and feel. And for this particular List, I've used one of the new templates in SharePoint Online to create this very nice looking issues tracker. But again, it is still essentially a List. We have our Column Headings running across the top and then we have our Records underneath.

And the final example I'm going to show you here is this one GlobalTeach Calendar. Let's click on this because this one does look a little bit different. So this time, it's showing me my Calendar. And you can see that I have a couple of events scheduled into this Calendar. And you might think to yourself, well, how is this a List? It looks nothing like the other Lists that we've been looking at. Well, essentially, it is still a List. It's just been formatted to take on the look and feel of a Calendar. And this is a good point for me to also mention something else related to the layout.

If you do find yourself switching between Modern View and Classic View, so right now it's switched me back into Classic View, you'll find all of your menu options when you're in Classic View are located on ribbons at the top here. So where I have Events, if I click this, I get that ribbon structure, which we're very used to when we work in Microsoft products. So just be aware of that everything that you need to do with this particular List is located on a ribbon.

Now I'm going to stay on this Calendar ribbon for one second, just to show you that this is in fact a List. If we go over to the Manage Views group, just here, it says Current View, and I'm showing it as a Calendar. But if I click the drop down, what I could do is instead of displaying it as a Calendar, if I select All Events, take a look at what happens, it converts it to that List format. So we have both of those meetings listed there, but it's in a more standard structured List.

I have my Column Headings running across the top, and then my content. So just be aware of that even though the Calendar doesn't technically look like a List, it is. It just has Calendar formatting over the top.

Now in the next lesson, we are going to start to create our own Lists. And I'm going to show you how I built some of these. But before we do that, just to give you some kind of idea as to where you can go to see all of the different types of Lists that you can create, let me show you a couple of different ways that you can do this.

So I'm back on my Home page, and if I decide that I want to create a new List, I can click on the New button at the top. And the first option I get here is List. I can choose to create a Blank List, I can choose to create a List from data that already exists in something like Excel. So maybe I want to bring in those employees that I had in the spreadsheet at the beginning of this session into SharePoint as a List, I can definitely do that. Or I can choose an existing List that exists within SharePoint.

And then underneath I have some fancy new SharePoint templates. And it's this one here the Issue Tracker that I used for my GlobalTeach Issues List. And you can see I have eight of these new little templates, which have a really nice modern feel to them. I can use any of those if I want to create a List. Now it might be that the List that you want to create doesn't really match any of these templates we have down here. And if that is the case, there is somewhere else you can go to create your Lists. And this is where you'll also find all of the additional templates that you have for creating Lists, and also creating things like Libraries that we're going to get on to a bit later on in this course. So let's close down this window.

What I can also do is go to App at the bottom of this List, it's going to jump across to the Site Contents page, and it's going to show me all of my Apps. And all of these blue squares that you can see in here are either Lists or Libraries that you can add to your SharePoint site. So you can see at the top here Tasks, this is what I use to create my Task List. If I scroll down, I have Contacts, I could use that if I wanted to create a Contacts List, Calendar, we've seen that one as well.

We have Issue Tracking, we can even create our own Custom List from here as well. So what these basically are are templates for different Lists. So they'll give you standard Column Headers that are related to that specific List. And of course, all of these templates can be customized, but they're a really great way to start creating a List so you don't have to do it from scratch. And it makes building new Lists or new Libraries a lot quicker and easier. All of these templates you can use to store your data. And in the next lesson, I'm going to show you how you can create a List.

Video: Creating a Task List

Deb: Now that we understand the concept of a List in SharePoint, let's jump into our site and create a brand new one. Now what I've actually done here is I've deleted the GlobalTeach Task List that I've previously created. And we're going to go in, and I'm going to show you how you can add a List.

Now the first thing we need to do here is go up to the New button, and click that drop down. And remember, there are two places that you can go in here to create a List. And where you go really depends on the type of List that you're looking to create. If I was to jump into the first option, here List and take a look at my options, I can't really see anything in there related to Tasks. So we're going to close that down. And we're going to try the App option instead.

So now I get those blue tiles. Remember, these represent different Lists and Libraries that you can add to your SharePoint site. And if we take a look in the top row, I can see there is the one that I want the, Tasks List. And what these basically are are templates. And pretty much everything you work with in SharePoint is based on a template. So it means that you don't really need to build anything from scratch.

For example, when it comes to Lists, you don't need to go in and define the Columns that you want in your List, because the template is going to do that for you. Now the first thing we need to do here is we need to give our List a name, TrainingTasks. Now one thing you'll notice here is I don't have any spaces in that name. And this is really good practice to get into because the name that you put here is not only the one that the user sees, but it's also the name that shows up in the browser's URL. And what you'll find is that if you have spaces in the name, then the URL is going to contain some strange characters.

What will happen is that wherever there is a space, it will be replaced with a percentage sign and a number 20. And that can leave your URLs looking a little bit messy. So I'm going to create it like this, we can go in, and change the way it looks to the user at a later time. So let's leave it with no spaces and click on the Create button. Now, what you'll notice is that it's jumped me back to the Site Contents area. And if you remember, this is where you can go to find all of the content that's stored in your site.

So if you add something like a new List, as I've done here, you'll be able to find it in the Site Contents page. And if I take a look right at the bottom, the last Record in here is Training Tasks. So this is actually the List that I've just created. Now, again, a little bit of a difference if you're using the Classic View in SharePoint as opposed to the Modern View that I'm using. If you're using Classic View, you'll find that your List will go straight into your Quick Launch Menu on the left-hand side. But because I'm using the Modern View, it doesn't actually put it there by default.

Now, I actually do want this to be listed out in my Quick Launch Menu bar, because this is where I have all of my other Lists. So I have my Contacts, my Issues, and my Calendar. I want Training Tasks underneath here. So how can we move this to that Quick Launch Menu? Well,

it's actually a little more complex than you might think. Notice as I hover over the Training Tasks List, I get these three dots. When I click, it's going to show me more actions. And what I want to do here is jump into Settings for this List.

I then need to click on this first link at the top here List name, Description, and Navigation. And this is where I can say Yes, display this List on the Quick Launch Menu. So I'm going to check the Yes radio button and click on Save. So let's refresh the page. I'm going to do that by jumping back to Home. And now you can see that I have Training Tasks in my Quick Launch Menu. And if I click on Training Tasks, it's going to take me to a page where I can start to add in any Tasks that I have.

And if you take a look at the URL, you can see what I'm talking about. So because I named this without any spaces, I don't have any strange characters lurking around in this URL. But the drawback of this is I don't actually want it to look like that to the user. So let's quickly go back to Home, and let's fix that. I'm going to go to my Quick Launch Menu, and right at the bottom, I have an Edit button. And this is going to allow me to edit any of these Items in this menu. So let's click the three dots next to Training Tasks and say Edit. And now I'm just going to change this so that it matches everything else.

So I'm going to add in GlobalTeach. We're going to put a hyphen in there and let's put a space in there as well. So it looks similar to everything else and click on Ok. Another thing I'm going to want to do here is I don't want Site Contents in the middle. I want all of my Lists together. So I want to move my Training Tasks further up this Quick Launch Menu. Once again if we click on the three dots, we can select Move Up to rearrange the order, click on Save. And that looks a lot better now. So let's jump into our Training Task List. And one more time, I'm going to refer you to the URL. Because even though we've changed the name that the user sees in the menu, if you take a look at the actual URL, it still says Training Tasks.

Now, because we're using a Task template for this, the Column Headings for my List are already defined. So I have checkmark Task Name, Due Date, and Assigned To. So now all I need to do is go in and add my Tasks. Now another thing you'll notice here is that now that I've created a Task List, I have my ribbons at the top. So if I click on Tasks, that's going to drop down that ribbon, and I have another tab here called List. And basically, I can find all of the things I want to do with this List somewhere on either of these ribbons.

Now one little thing I would advise you to check in here is the List Settings. So all the way over in the Settings group on the end, if you click List Settings, this should look a little bit familiar because we came in here when we were assigning our Task List to our Quick Launch Menu. Now there are so many different Settings that you can change for your Lists, but they are split down into three groups, we have General Settings, Permissions and Management, and Communications.

So this is where you can find all of your General List Settings. And it's definitely worth having a little dig around in here just to make sure that everything is set up to work in the most efficient way for you. In the List in the middle, we have Permissions and Management options. So we can do things like Delete this List, we can change the Permissions for this List, we can set up

workflow Settings, all good stuff like that. And we are going to be dipping in and out of this as we go through the course.

So, I would definitely advise you to jump into here and have a little dig around and definitely check the Settings prior to creating your first List. So now that we have our Training Task List created, the next thing to do is add some Tasks and that's exactly what I'm going to be doing in the next lesson.

Video: Adding Items and Modifying Lists

Deb: In the previous lesson, I showed you how to create a Task List in SharePoint. And in this lesson, we're going to populate this List with some new Tasks. And this process is extremely simple. Now before we get onto that, I just want to point out to you something which you may have already noticed.

If you glance up into the header area, you'll notice that the header still says TrainingTasks with no space. And this is probably something I should have changed when we were in the List Settings, but, I forgot. But not to worry, we can go back and do that now. So I want to update this so that it displays the same wording as what I have in the Quick Launch Menu. So I want it to say GlobalTeach Training Tasks. So for this, we need to jump back into our List Settings.

So if we go up to our ribbons, and click on List, all the way over to the Settings group on the end and click the List Settings button. And we want to jump into List Name, Description, and Navigation. And this is where we can change the Name and Description. So I'm going to change this to the same as the Quick Launch Menu. So that is GlobalTeach Training Tasks, and click on Save. And now you'll see that that is looking a lot better.

Now that we've done that we can go in and start populating this List with some Tasks that need to be completed. So just above where we have our Column Headings, and remember, these are based on the template that we used, we have a New Task button. So let's click in and this opens up some fields that we can complete. Now you'll notice that the only one that has an asterisk next to it is Task Name. So that is the only mandatory field that you're required to complete in order to be able to save this Record. So if I just have a Task Name in there, I could save this, it wouldn't really have any information in it, but I could do that.

If I don't complete the Task Name, then I'm not going to be able to save the Record. So let's add a new Task. I can then add in a start date and a due date for this particular Task. So maybe I want to start this, let's say next Monday. And I need to finish this by the Monday after that. So the 21st, I can then choose if I want to assign this to somebody. So it might be that I want to assign this Task to somebody in my team, or I could even assign it to myself. And that is exactly what I'm going to do here, I'm going to start to type my name, my name has come up in the List below. So I can just select and then click Save to save this Task to my List.

And one thing you'll notice here is that new Task will have a little green icon next to the Task Name. And really, that is just indicating that that is a new Item that you've added to your List. Now I'm going to go in and I'm going to add another new Task. Now what we're going to do this time is if you take a look right at the bottom, we have a little link that says Show More. And if I click this, this is going to give me some more information that I can add for this specific Task.

So what I'm going to do here is I'm going to add another Task, and I'm going to say Research SharePoint Updates. I'm going to give it a start date of tomorrow, and a due date of let's say Thursday, I'm going to assign it to myself. And I can even enter in a percentage complete. Now, I haven't started this yet, so I'm going to leave it at 0%. But if you wanted to keep track of

progress on your Tasks, you could come back in here and edit this percentage. I can even add predecessors in here. And you can see it's currently showing the other Tasks that I added.

So if I had more Tasks in this List, they would all show in here. And if one of these Tasks needs to be complete, before I can start this Task, I can add that as a predecessor simply by selecting the Task and clicking Add. I can also choose a priority for this Task. And I'm going to leave this on Normal, and also a Task Status. So I can specify whether this is In Progress, Not Started, Completed, Deferred, or Waiting on someone else. So I'm going to say, Not Started and click on Save. So extremely simple to add Tasks into a Task List.

Now what if I want to go in and modify one of these Tasks. It's gonna make sense that I might need to do something like that, particularly as I work on these Tasks, I'm probably going to want to update the progress. Now there's a couple of different ways that you can do this. So let's say we want to edit this last Task that we added; Research SharePoint updates, I can click on the link to open the Task.

Or alternatively, I can click on the three dots, and then the three dots again, and I have an Edit Item button in here as well. But to be honest with you, it is a bit quicker just to click on the Task Name. So that's going to jump you back into your Task, and then you can make whatever updates you need to make. So let's pretend that this is at 50% done. And I'm going to change the status to In Progress, and click on Save.

The final thing I want to show you here is what happens when you mark a Task as complete. So again, we're going to go back into Research SharePoint Updates, we're gonna click on the link this time. And when you click on the link, it does just take you into a view only mode. If you want to edit any of this information, you need to jump up to that View ribbon and click the Edit Item button.

So now, I'm going to say that this is 100% complete, and I'm going to change the Task Status to Completed, and click on Save. And take a look what's happened, my Task is now showing with a strike through. So every time you do complete a Task, it's going to show in your List just like that.

Now you could go in and delete Tasks that you've completed. I would advise against doing this because I know from my own experience that sometimes it's good to be able to go back and really take a look at the Tasks that you've completed. Now once your List of Tasks grows a bit longer, you might find that over time, you have many Items showing there with a strike through, so many Items that have been completed.

And you might think to yourself, well, I don't really need these, do I want to delete them? And you might think to yourself, it's gonna be a lot easier for me to see the Tasks that I need to see if I delete out all of the Completed Tasks. Well, you could do that if you wanted to. But in the next lesson, we're going to discuss Deleting List Items in a bit more detail.

Video: Deleting List Items

Deb: So I've gone ahead and I've added in a few more Tasks into the GlobalTeach Training Task List. And currently one of those Tasks is showing as complete as it has a strike through through the Task Name.

Now, I showed you one way that you can mark a Task as complete. And that is by editing the Task and changing the completion to 100%, and also changing the status of the Task to complete it. But if you quickly want to check off a Task in your List, you can simply click in the checkbox next to the Task you want to mark. So if I click this checkbox just here, it's going to show that writing the course outline for SharePoint Online, that Task is now complete.

Now, as I mentioned, at the end of the previous lesson, when you have a reasonably long Task List, and those Tasks start to be marked as complete, you're probably going to want to get rid of them or have some kind of way to filter out the Completed Tasks, so you can just see the Active Tasks. Now I will say I am not a big fan of deleting things from SharePoint. So in general, once I mark a Task is complete, I won't then go in and delete it out because I like to have a Record and be able to see the information for the Tasks that I've completed.

And in the next lesson, I'm going to show you a way that you can filter this List to do exactly that. So you can just see the Active Tasks and not the Completed Tasks. But sticking on this subject of deleting Items from a List, if you did want to permanently delete one of these Tasks, again, it's a reasonably straightforward process. If you hover over the Tasks that you want to delete, and click the three dots and the three dots again, you can see that you have a Delete Item option. You can also delete Tasks using the ribbons.

So again, make sure that you have the Tasks that you want to delete selected, jump up to where we have the ribbons, and then click on the Tasks tab. And in the Manage group, there is a Delete Item button in there as well.

So just to demonstrate deleting in a little bit more detail, I'm going to delete something that I'm happy to lose. So I'm going to go across to my Calendar List. And remember, Calendars are just a List as well. So what I'm going to do here is I'm actually going to delete out this meeting that I have on Thursday. So let's click on the Item. And I'm going to press the Delete key on my keyboard. And you'll notice that I get a little pop up message that says; "Are you sure you want to send this Item to the Site Recycle Bin". So I'm going to say Yes, I do. Let's click on Ok, and that Item has now been removed.

So every time you delete something in SharePoint, it's going to go into your Site Recycle Bin. This is very similar to the Recycle Bin that you might be more familiar with on your Desktop. So if we jump back to Home using our Quick Launch Menu, you'll see right at the bottom of this menu, we have a link to the Recycle Bin. And if I click on this, you're going to see all of the things that I've deleted or sent to the Recycle Bin.

And you'll notice right at the top of that List is the Item that we've just deleted, it says Training Review. It's showing me the date deleted, who it was deleted by, who it was created by, and the

original location. So I can see here that this one was deleted from the GlobalTeach Calendar. Once again, everything you see in this Recycle Bin is in a List. We have that Column Heading structure, and then all of our Records.

Now if you did want to delete these permanently from the Recycle Bin, you do have an Empty Recycle Bin button at the top as well. And once you empty your Recycle Bin, those Items are deleted permanently and there is no way for you to get them back. So just be aware of that before you start doing any deleting. Now, what about if I accidentally delete something?

Well, let's pretend that I didn't mean to delete this meeting from my Calendar. Well what I can do is I can select it, and if you take a look at the bar running across the top, I now have a Restore option. So if I click Restore, it's basically going to restore that Item back to its original location. So hopefully now, if I go back to the Calendar, I should find that that meeting is back in there and I can see that yes, it is.

So, have a little play around with that on your Practice Site. Try adding some Tasks into your Task List, and then deleting them and restoring them back to their locations.

Video: Sorting and Filtering Lists

Deb: There are many things that you can do with Lists in SharePoint. When you have many Items in a List, you're going to want to be able to manage these a bit better and find specific Items. And this is where Sorting and Filtering can really help you out. And you might be more familiar with those terms when using something like Excel.

We've probably all had the experience of receiving quite a large spreadsheet of data, and having to use the Excel Sort and Filter facilities to extract the information that we're interested in. And we have something similar to help us manage our SharePoint Lists.

So currently, I'm clicked on the GlobalTeach Contacts List. And this List isn't particularly long, but we have a few Records in here. And if you remember, I created this List using the Contacts List template. And currently, I haven't made any customizations to this template. So I just have the standard Column Headers that come with that template. So taking a look at this, how can I make this List a little bit easier for me to search through?

Well, one way I could do it is I could choose to Sort the List. And what you'll notice is that each of the Column Headings has a little drop down arrow next to it. And this is where you'll find your Sort options. So for example, maybe I want to Sort this List A to Z, or Z to A. So if I click the drop down next to Last Name, that's exactly what I get. Now, I think these are already Sorted A to Z, so let's just do Z to A. And you'll see that List will reorder.

If I click the drop down again, I can change it back to how it was originally. And you'll find those options under all of these drop down menus. So Sorting a List in SharePoint is pretty simple. What about Filtering?

What if we are only interested in the Training Contacts that we have at a specific company, so let's say Kings Landing PLC? Well, this is where I could use Filters to help me with this. Now there's a couple of different ways that I can use Filters. What I can do is I can go to the Company Column, click the drop down, and I can say Filter by, and it's going to open up a Filter by company.

The other way I could do this, if I just close this window down, is by clicking on the Filter button to open up the Filters pane. And this is basically the same thing, but it's not just showing me the company Column. So if I want to apply multiple Filters to multiple Columns, this is a really efficient way of doing it. So I'm going to scroll through because I do you want to Filter for just the Contacts that we have at Kings Landing PLC, and you'll see as soon as I click that, it performs the Filter, and I can see that I have two Contacts.

What you'll also notice is that when you have applied a Filter to a specific Column, you'll see a little Filter icon next to that Column Header. So this is quite useful. If you're not sure which Column you've applied your Filter to. If I want to remove this Filter, I can click the drop down and click on Filter, and then just deselect, and click on Apply.

Now that we've applied some Sorting and Filtering to this type of List, let's take a look at our Calendar List. Because our Calendar is essentially displaying our List in an entirely different way. And you'll notice that we don't really have any Sort or Filter buttons anywhere on this page. And you might think to yourself, well, maybe I can't perform a Sort or a Filter on the Items in my Calendar. Well, you actually can, all we need to do is convert this Calendar to a List and then we can use our Sort and Filter.

So let's jump up to our ribbons and jump to Calendar. And if you remember, we actually came into this a little bit earlier on in the course. So if we go to the Manage Views group, you can see that I'm currently viewing my Calendar in Calendar format. But if I change this to All Events, that's going to show me all of my Calendar Items in a more traditional style List. And this List on my SharePoint defaults to the Classic Experience, but the method that we use to Sort or Filter is practically the same.

If I decide that I want to Filter by Location, I can click the drop down and you'll see here that I can Sort A to Z, Z to A, or I can Filter for all meetings that are taking place in Meeting Room 1 or Online. Once again, we get the little Filter icon and if I want to remove that, I just need to select Clear Filters from location. So that's how you can Filter your Calendar Items.

Video: List Views

Deb: As we've already seen in this course so far, let's give you a place to store your Records. So now that you're able to store and maintain those Records, you might need at some point to search the List to find specific Records. And built into Lists, we have something called List Views. And List Views are basically Predefined Filters. And many of the templates that you use in SharePoint will come with their own Predefined Filters.

And if you're not sure what I mean by Predefined Filters and List Views, let me show you an example. So I'm in the GlobalTeacher Training Task List. And if you remember, we've got a few different Tasks in there, and a couple of them are showing as completed. Now, as I mentioned when I was talking about deleting, what if I only want to see the Active Tasks, and I don't want to see the Completed Tasks?

Well, I can use one of the inbuilt predefined List Views in order to do that. And the List View is located just above the List. You can see currently, the one in blue is the one that I'm clicked on. So currently, I am showing All Tasks. If I click on Calendar, it's going to show me my Tasks, but viewed in my Calendar.

So, this is based on the Start Date, and the End Date of the Task. If I click on completed, it's going to show me all of my Completed Tasks. And if I click the three dots, I have a few more different List Views that I can use.

So for example, a Gantt Chart, I can see my Late Tasks. So that would be any that have gone past the due date. I can see just the Tasks that are assigned to me, or I can see Tasks that are upcoming. You'll also notice underneath that I can choose to modify this view and also create my own view. And we're going to be doing that in the next lesson. But for the time being the main concept I want you to grasp here is this concept of inbuilt List Views. Now let's jump across to our GlobalTeach Contacts List.

Now when it comes to the views for this particular template, the Contacts template, all of the List Views that I have are located in this drop down. So currently, I'm displaying All Contacts, and I don't really have any other views other than All Contacts. The two below are just showing in a List or in a Compact List, which just makes the line spacing a little bit less.

But you'll notice that unlike the last List that we looked at, where we could show the Completed Tasks, Upcoming Tasks, my Tasks, so on and so forth, we don't actually have any inbuilt for this Contact template. And you'll find that with some of the templates that don't necessarily all come with those inbuilt List Views.

But of course, we can create our own new view and use that in this List. Now with something like a Contacts List, you're probably going to use Filters if you want to extract certain pieces of information. Like we saw before, if you just want to see the Records for a specific company, I can very easily apply a Filter to the Column in order to see that.

SharePoint Online

The alternative way of doing something like this would be to create your own view. And if we check out the drop down menu again, you can see that we do have the facility to do that in here as well. And that's exactly what we're going to be doing in the next lesson.

Video: Creating and Modifying List Views

Deb: As we've already seen, if you build a List based off of a template, some of those templates come with default views. And if you remember, when we were taking a look inside our Contacts, this particular template only comes with one view, and that is to display all of the Contacts. So how can we maintain this List by creating our own views, and also modifying them? Well, let's do exactly that.

What I'm going to do here is create a brand new view for my Training Contacts. And the way that I want this view to look is I want it to display just the Contacts for Kings Landing PLC. And I also want to modify some of the Columns that I have in this view. For example, you can see here, I'm not really using the Attachments Column, or the Home Phone number Column. So in the new view that I'm going to create, I'm going to make sure that I get rid of those Columns. And when I start to put together this view, I might find that there are some additional Columns, which aren't currently being displayed that I want to display in my view.

So let's create this view, we're gonna jump up to the drop down next to All Contacts, and we're going to go down to Create New view. So I need to give this view a name. Then I get to choose if I want to show this as a List, a Calendar, or a Gallery. Now for this one, I want it to look pretty much the same as the All Contacts view, so I'm going to keep it as List. I can then choose if I want to make this a Public view or keep it as a Private view. And as you can see there, it says; "Public views can be visited by anyone who has access to this List". So I'm going to keep this as a Public view and click on Create.

So now you can see I'm actually in my new view, Kings Landing PLC Contacts. And because I haven't really defined any criteria for this view as yet, it's currently just displaying all of the Contacts the same as if I'd selected All Contacts. So what I want to do here is I'm going to go in and edit the current view. And this is where I can get very granular about the Columns that I want to display. If I want to Sort, if I want to Filter, and a few other Settings as we move through. So I can see the name there is fine, I don't need to make any changes there.

The next section is Column. So this is where I can define the Columns that I want to appear in my view. Now, if you remember, we weren't really using the Attachments Column so that's a bit of a waste of space. So we might as well get rid of that one. I'm also not really using the Home Phone number Column, so I'm going to deselect that one as well. But I do want to add into this view, the City Column, and also the Job Title Column. And you can see all of the other Column Headings here that I could possibly use in my view, there's a lot of them.

If we move down to the next section, I can specify if I want this List sorted or if I want this view sorted. So I can go in and I can choose a Column that I want to Sort by. So maybe I want to Sort by the Last Name Column, and I'm going to sort in ascending order. Next, I can choose if I want to apply a Filter. Now remember, for this List, this is for the Kings Landing PLC Contacts. So I'm going to say Show Items only when the following is true. Show the Items when Column Company is equal to and then I'm going to type in Kings Landing PLC.

Now this is all I'm going to define in this particular view. But I would recommend that you have a poke around some of these additional Items that you can define for your view. So things like Tabular view, you can choose if you want to group your Contacts, you can even do things like add Totals to your view as well. So definitely worth a look through here. For the time being, I'm going to just say Ok at the bottom, and straight away, you can see that my view has now changed.

It's removed the Attachments Column, it's also removed the Home Phone number Column, and it's added in the City Column, and also the Job Title. So now if I click the drop down, I can switch between All Contacts, or just the Kings Landing PLC Contacts. So I've essentially created my own custom view.

So now that we have this new view, how do we go about modifying it if we want to make any changes? Well, we could very simply click the drop down and say Edit current view, which is going to take us back to that Edit View page, and we can make whatever changes we need to make. But let me show you a slightly different way. Instead of doing that, what I can do is from this menu running across the top, I can say Edit in Grid View. And now all of these fields become editable.

So for example, for Cersai Lannister just here you can see that currently she doesn't have a city listed. So what I can do is I can click in here and I can add in a city manually. Once I'm done I just click Exit Grid View, that is a much quicker way of making simple modifications to your Records. How else can we change this view?

Well, if we scroll across, you can see on the end here, it says Add Column. So if I click the drop down, I can choose what kind of Column I want to add. So maybe I want to add a Column to this data, which tells me this person's department. So that's gonna be a word essentially, it might be Sales, it might be HR, it might be Marketing.

So what kind of data type do I want to use for this particular Column? Well, I could use Single line of text. That will allow people just a free type in whatever they want. Now, the problem with that is particularly if you've got lots of people managing this Contact List, is it leaves you very susceptible to typos, spelling errors and mistakes.

Before you know it, maybe someone has put HR in the Column and somebody else has written out human resources. The system is going to see those as two completely different Records instead of two people that are within the HR department. So what I like to do here is really try and lock this down and prevent as many errors as possible by giving people a set List of choices. So for this Column, I'm going to choose Choice. Let's give the Column a name, I'm going to call it Dept.

I could add a Description, but I'm not going to at the moment, the type here is Choice. And now I can enter in the different choices. So let's see, choice 1 is going to be HR, choice 2 is going to be Finance, choice 3 is going to be Marketing, I'm going to add another one, this one's going to be Sales. And let's add another one here of IT. And you could carry on going. Now I'm not going to

check this checkbox. Because I don't want people to be able to add their own values manually, I want them to select one of the options that I've set. I can then choose a default value.

So before they actually select something from the drop down menu, do I want a particular choice to show in the field? Well, I'm going to say No here, I'm just going to click on Save. And there we go. Now I have a Department Column. So now that we have that new Column, let's add a brand new Contact.

I'm going to go up and click on New. And let's say the Last Name is still Lannister, this time, we're going to say the First Name is Tyrian, I'm not going to bother with the full name, because I don't actually have that displayed in my Record, let's give him an email address. The company is again Kings Landing PLC. His job title is let's just say he's an assistant. And I won't fill out the rest of these. But if we scroll down, you can see right at the bottom, there is a new field Department.

And notice as I hover over it and click, I'm getting a pop up menu, which is gonna allow me to make my choice. So let's select Finance, and I'm going to click on Save. And if I scroll across, you can see that the Department is showing as Finance. Now what you'll find is that if you add a new Column and you already have Contacts in there, obviously it's not going to populate this information for the existing Contacts. So this is where I would use this Edit in Grid View, because this is a lot quicker.

If I click in Department now, I can then just select the Department that I need. So let's go for Marketing. And then for this one, let's go for IT. Exit Grid View, and there we go. Now that I've added this Column, what about if I want to delete one of these Columns? Well you could go in and edit the current view, scroll down, and find the Column that you want to remove, and just deselect it.

Another way that you could do this would be to click the drop down next to the Column you want to remove, go to Column Settings, and select Edit. And then right at the bottom here, you have a Delete button. Now another thing you might want to do just to liven up this List is you might want to format this view. So if I click the drop down, we have a Format Current View button right at the bottom. This just allows me to apply some alternating row styles or some conditional formatting.

So I could say Edit Row styles. And I could change the color if I wanted to. We're not going to, I'm just going to stick with this light gray and click on Save. And that can sometimes make a long List easier to read. Now there is a lot of maintenance that can go on with a List. You can change views, add Items, Filters, or add Columns, remove Columns, and there's even more that you can do behind the scenes. So this is where you might want to dive into List Settings and have a little look at the options that you have in there.

Now if you're working on a page in the Modern Experience, like I am just here, you don't have your ribbons at the top where you can access your List Settings. So another way to get into those is by clicking the cog icon in the top right-hand corner, and then you have Lists Settings in there. And this is going to jump across to a page which should look reasonably familiar to you.

Now, I will say that if when you click on that cog the List Settings is grayed out, it means that you have permission levels less than a member. So it means that you're probably a visitor or a guest in this SharePoint site, and you don't have access to take a look at those List Settings. So if we quickly jump back into List Name, Description, and Navigation, remember this is where you can come to change the name of your List.

So once we're in here, I'm going to take this opportunity to change this to GlobalTeach. And I'm going to remove the word Training and we'll just have GlobalTeach Contacts. And remember, if you want to make sure that your List is displayed in the Quick Launch Menu on the left-hand side, make sure you have the Yes radio button selected in here. Let's click on Save. And we should find that our title has now updated.

Let's jump back to Home, back into our Contacts, and there we go; GlobalTeach Contacts. And let's switch across to our brand new view, Kings Landing PLC Contacts, and there we go. So that is how you can create your own custom view in SharePoint.

Video: Creating Custom Lists

Deb: Having all of these Lists templates built into SharePoint for things like your Contacts and your Tasks is great because they're easy to use, and they give you a good foundation from which you can build from.

But many times, you might not need one of these default templates, you might need something completely different. Maybe you need a List to store asset details, or maybe product details, or something else that's outside of the norm in SharePoint. So, what do we do if we want that kind of List?

Well fortunately, there is a template that we can customize to create a Custom List. And it is a template, but it only comes with one Column. And the idea behind this is that you can basically customize or add your own Columns, and build it from scratch. So we're going to create our own Custom List and then add our own Columns. So maybe I want to create a List that shows all of our global office locations, and how many employees we have in each of those locations. So I'm going to give my List a name, I'm going to call it OfficeLocations. Remember, I'm not putting a space in there. Let's click on Create. And once again, now I've created this List, it's jumped me into my Site Contents page.

Now because this is a List, I want this to show in the Quick Launch Menu on the left-hand side. Can you remember how we do that? Well, let's find OfficeLocations, and I can see it's just here. Let's click the three dots and jump into Settings. And from our List Settings, we go to List Name, Description, and Navigation. And this is where we can modify the name and also choose if we want to display it in that Quick Launch Menu. So I'm going to put a space in between office and locations and say yes, I want to put it in the Quick Launch Menu. Let's click on Save.

So now if I jump back to Home so that the page refreshes, I can see at the bottom here we have OfficeLocations. Now because this is another List, I'm going to edit the List and just move that Item up. So let's click the three dots, and move up, and Save. So now I'm in this brand new List. As I said it only has one Column, and that is the Title Column. So the first thing I'm going to do is modify this heading because I don't want it to say Title. So to do that, if I click the drop down arrow, go to Column Settings, I can say Rename, and I want this Column to be called Location, and click on Save.

So now I'm going to go in and add my own custom Columns. So underneath this first Column, I want obviously the geographical location of our global offices. Maybe in the second Column, I want to know how many employees there are in that particular office. So let's click the drop down. And this time, I'm going to say that I want this data type to be Number. Now the name of my Column is going to say number of employees. The type is Number, I'm getting a preview underneath that's absolutely fine.

Number of decimal places, well, I don't think there are really going to be any decimal places. So let's just leave that on automatic. I could enter in a default value if I wanted to. In this case, I'm

not going to I just want this to be a field that people can type in 50, 100, 150, something like that. And let's click on Save. And there we go, we have our new Column.

Now I can widen these Columns out simply by dragging the border. Let's add another Column. So maybe now I want to add in the name of the manager of this particular office. And for this one, I could choose person or I could make sure that people are typing in the correct manager's name by using Choice.

So for this one, let's just say manager, I want it to be Choice. And let's say the first manager is called Jenny Smith. Our second manager is Matt Barker. And our third manager is Naomi Thomas. Of course, I could go through adding more if I wanted to. I'm not going to use any of these as a default value, let's just click on Save. And then the final Column that I'm going to add is whether this office is an HQ, if it's a headquarters office.

So for this one, we're going to use the Yes/No option. So my title is going to be Head Office, the type is Yes/No, I actually am going to give this one a default value of let's go for No and click on Save. And there we go very simply, I've managed to create my own Custom List. So now let's go in and add some data.

If I click the New button at the top, you'll see that it's going to display all of the new Columns that I've added. So for the Location, let's enter in London. Number of employees, let's say there are 1500 employees in London. The manager, well, that is Jenny Smith. And is this a head office? Yes, it is. Let's click on Save. And there I have my first Record.

Remember another way I can do this is simply to edit in Grid View. I can add my new Items. So let's say Paris is another location. In Paris, we have 1000 employees, and the manager is Matt Barker. Is this the head office? No, it's not. Exit Grid View to save that List. So, very simple to choose that Custom List template. Start out with one Column, and then customize and add your own Columns to essentially build a bespoke List.

Video: Important List Data from Excel

Deb: As we've already seen, SharePoint has different templates you can use to build standard types of Lists. But you're going to get to a point where you maybe have a List that's been created in another application. So something like Excel, that you want to import into a SharePoint List. So we're going to do exactly that.

You can see on the screen right now I have an employee List. And this is a reasonably small dataset. It shows the Employee ID, the First and Last Names of the employee, the Department, the Location and their Salary, and I want to pull this into SharePoint as a List. Now, of course, what I could do is I could create a List in SharePoint and manually add these entries. But that's going to be extremely time consuming. Fortunately, in SharePoint, there is a way that we can very quickly import anything that we have in an Excel List and even Lists located in other applications.

So to import a List from Excel, all we need to do is from the Home page, jump up to the New button, and go into the List menu option. Right at the top here, underneath the create a List heading, we have a big old button there that says From Excel. So that looks like exactly what we want. Let's click it and see what happens. So now I get a Choice, I can upload from my device, or I can choose a file that's already located within SharePoint. And it's basically recognized that I have a couple of Excel spreadsheets just here.

Now in this case, I want to upload that Employee List. So I'm gonna say Upload file, and then I need to find where this file is located. So I've navigated to the folder, there is the file, let's click on Open. SharePoint is now uploading that information and building the List. So at this stage, we get the opportunity to customize what we're importing. So you can see here it says, "You don't have any tables in this file, you need to define tables to import as a List". And that is completely correct. So that information contained within that Excel spreadsheet, I hadn't formatted as a table. It was just data that had been typed into the cells, and I'd applied a bit of formatting to the headings.

Now just below, it's telling me what I need to do to tell SharePoint which information to import. I need to open the Excel document, select the cells to include, select the data and click Format as Table. So it's basically saying to me, I can't import this information unless you format it as a table. So let's do exactly as it says, I'm going to click Open to open the Excel document. And it needs me to format this as a table. So all I need to do here, and if you're not particularly familiar with Excel, this isn't too complicated.

I'm just going to click somewhere within my data. On the Home tab, we have a Format as Table option. And now I can pick any one of these table styles. So I'm just going to go with this one just here. It's saying the data for your table is in the following range, A1 to F32. And I can see yes, it does start at A1, and it does go down to F32. Because basically what Excel will do is it will look at where you're currently clicked and select the cells that contain data around it.

I want to make sure that I specify that my table has headers, because this is what's going to be used for the Column Headers in the List in SharePoint. Let's click on Ok, I've now formatted it as a table, and one last little step I'm going to do here is I'm going to give this table a name. So we do that by jumping up to Table Design, and instead of the generic name of Table 1, I'm going to call this Employee or Emp_Info. Again, I'm not using any spaces there, I'm separating the two words with an underscore and hit Enter to set.

So now that I've done that, I can close down this tab and click this Refresh button. And now SharePoint is recognizing this as a table of data. You can see at the top here, it's picked up the name of my table from this file. And then underneath it says; "Check the Column types below and choose a new type if the current selection is incorrect". So I need to go through and look at the data contained within each Column, and make sure that the type specified above is correct. So in here in the Employee ID, I have some numbers. So I want to make sure that this is Number.

The next Column is Name, so this is essentially Text. So I'm going to say, Single line of text. The same applies to the Last Name, and also to the Department. Let's click on Next at the bottom. I now get to give this List a name. And you can see it's put in this really, really long kind of messy looking name. So we're going to get rid of that, and we're going to replace it with Employee List.

Now again, I could add a Description. I'm not going to, to save bit of time. And this is where I can now specify if I want to add this Employee List into the Site Navigation. So I'm going to say Yes, I do. So let's keep a check in that box and click on Create. And there we go, there is the List.

Have a quick glance over and make sure everything looks correct. And I can see one little error just here. In this first Column, the heading says Title and what this should actually say is Employee ID. So I'm going to click the drop down, go to Column Settings, and rename this Column. I'm going to rename it Emp_ID and click on Save. Now that whole process was a lot quicker than adding in all of the information manually. So if you have your data in an Excel spreadsheet, it is reasonably simple to create a SharePoint List by importing it in.

The final thing I'm going to do here is go to my Quick Launch Menu, I can see that I have the Employee List just here. Again, I want this moved above Site Contents. So, let's edit this List, and let's move that, and click on Save.

Section 4 – Creating a Document Library

Video: Creating a Document Library

Deb: Hello, everybody, and welcome back to the course. In this section, Section 4, we're going to start to take a look at another really important aspect of SharePoint. And that is Document Libraries. So what exactly is a SharePoint Document Library?

Well, we've looked at Lists before. And we know that Lists have Headers and Records. Now a Library is similar, it is basically still a List, but it's a List of documents instead. So let's start out by taking a look at an example that might be a little bit more familiar to you.

So I've just opened up File Explorer, and I've navigated to a folder. And this is basically the folder that contains all of the videos I'm recording for this course. You'll also see in there right at the top of the List, I have an actual folder. And then towards the bottom, I also have some documents. And the rest of the files in this folder are video files. What you'll also notice here is that we have column headings running across the top, much like a List; Name, Status, Date, modified, Type, and Size.

But instead of Records, instead of List items, we have folders and documents instead. So if you can imagine taking this and importing it into SharePoint, that would be a Document Library. So let's now take a look at one in SharePoint. So I'm back in my SharePoint Team Site, I'm going to go to the Quick Launch Menu, and you can see that I have a Documents link just here. So let's click it and take a look at what we have. So this is a Document Library.

Again, I have some column headings running across the top. And then underneath, I have one folder called General, I can see I've got a PowerPoint presentation, a Word document, and two Excel files. So really, the only major difference between a List and a Library is that a Library contains documents and folders as opposed to Records. Now as with Lists, there are a few different types of Libraries that we can add into SharePoint. And we're going to take a look at some of those in a moment. But before we do that, let's just discuss the types of documents that we can upload into a Library.

Fortunately, you can pretty much upload anything you like. So you can store PowerPoint, Word and Excel files, you can store PDFs, images, video files, and of course folders. One of the only types of files that you can't upload into SharePoint are executable files, so anything that has a .exe file extension. And the reason why is because .xes are potentially dangerous to run on the server. And by default, you can upload 50 megabytes worth of a document into a Library.

Now, if you work in an organization where you have a SharePoint administrator, that is something that they control. So that is in a hard limit, if it needs to be raised, and your SharePoint administrator has the ability to do that. But in general, the default is 50 megabytes. Now, again, much like with Lists, Document Libraries are all based off templates as well. And

what you're looking at here is the default template for a Document Library. And this Library isn't one that I've added.

When you create a brand new SharePoint site, you're going to get a default Document Library along with that, and it's going to look very similar to what I have here. But of course, we can create our own Document Libraries as well, much like we could create our own Lists. If you take a look at the different menu options that we have running across the top, these are a little bit different to when we're in a List.

If I click the New drop down from here, I get something entirely different. This is going to allow me to create a new folder, or a completely new document. And creating documents in this way directly from SharePoint harnesses all of the power of the Microsoft 365 online applications. We'll get more into that a little bit later on. Let's just take a look at a couple of these other options that we have across here.

I also have an Upload button. So if I have an existing file or folder that I want to upload from my PC into the Document Library, I can definitely do that from here as well. We have the Edit in Grid View button, we've seen what that does, we also have a Sync button. So if you want to synchronize this Document Library with OneDrive on your PC, so that you can access your files from File Explorer, then you can do that if you want to. You can add a shortcut to this folder in OneDrive from here as well. And you can also export out this information to Excel. Now I'm going to get more into these as we go through the course.

But the final thing I want to show you in this lesson is just all of the different Document Libraries that you have access to. Now for this, we need to jump back to Home from the Quick Launch Menu back up to New and if you remember this is pretty much the same as when we were looking at all of the different List templates. So if I go down to App at the bottom, remember, these blue tiles are all related to Lists or Libraries. So you can see here we have Document Library, we have Form Libraries, Wiki Page Library, and also Picture Library.

So if you wanted just a Document Library for all of the pictures that you're going to be using, then that is the one that you would choose. And that template is going to come with all of the relevant column headings for pictures and images. So as you scroll through, you'll see that you do have quite a few different Libraries that you can add into your SharePoint site. Now if we just click back and go back to that New button, you'll also see aside from going down to App, we can choose Document Library just here.

And if I create a Document Library in this way, I just need to provide the name, description, and tell SharePoint if I want this to be in the site navigation, this is going to create me just a basic default Document Library. So it's going to look pretty much exactly the same as this one just here. So let's finish off this lesson by creating a very quick Document Library. I'm going to go back to Home, I'm going to click the New button and I'm going to go down to App. And I'm going to add a Document Library. I need to give my Document Library a name. So I'm going to create a Document Library for all of the User Guides that I create.

So we're going to call this one User Guides. Let's expand out these advanced options and take a look at what we have in here. Well as you would expect, I could add a description, I'm not going to just to save a little bit of time. And then underneath it says; "Create a version each time you edit a file in this Document Library". Now make sure that you select Yes, just here because we're going to get on to talking about versions towards the end of this section.

And all this means is that if you or somebody else edits a document that saved into the Document Library, SharePoint is automatically going to create a new version of that document. So you can still retain the original. So let's click the Create button, and there we go. There is my brand new Document Library.

So I'm very quickly going to add a document to my Document Library. And this is just going to be a test documents. So let's click the New button. I'm going to say I want to create a Word document, it's going to jump me across to Word Online. And again, remember, these Online Versions of the Desktop applications are really slimmed down versions. So they're going to allow you to do all the basic things that you'd want to do in Word, but some of the more advanced options aren't available in the Online Version, you would need to edit in the Desktop Version.

But for what we're doing here, this is absolutely fine. Let's just type in some test text. So I'm going to do a little trick here that all trainers tend to know. And that is the little piece of code to enter in some random text. And there we go. Now if you take a look up at the heading here, it's telling me that it's now saved. So, we don't have to save when we're working in the Online Version, because it automatically saves as we work. And what you'll also notice is that this particular Word document doesn't currently have a name, it just says Document.

So let's say this is the Word User Guide, all I need to do is click away, it's going to rename that file, and as soon as it says saved, I can safely close this down and just give it a couple of minutes. And it will update that title. And there is my first document saved to my Document Library. Now remember, when you are working in this Modern Experience and you're creating new Libraries, it works the same as new Lists. So, your new Library won't automatically show in the Quick Launch Menu, you have to specify if you want it in there.

So let's jump up to the cog button. Let's go down to Library settings, into List Name, Description, and Navigation. And this is pretty much exactly the same as what we do for Lists. And we want to make sure we say Yes to display this Document Library on the Quick Launch and click on Save. Perfect. So let's go back to Home and make sure that that is showing. And I can see that yes, it is. Now I'm going to leave this one underneath Site Contents just so I have something separating all of my Lists and all of my Document Libraries.

Video: Uploading Documents

Deb: Now that we've seen how to create a Document Library, and I've showed you how you can very simply create a new document and add it to the Library, let's take a look at how we upload and add existing files from our PC. Because there are a few different ways that you can do this, the first method you can use is to utilize this Upload button.

So if we click the drop down, I can choose to upload a specific file or files, I can upload an entire folder, which might contain one or many files, or I can upload a template. In this case, I'm going to select Files. It's going to open up my local drives, and I can then browse to where the file is stored and simply select it. So I have some files that I need to upload in my SharePoint Online folder. And I'm going to upload this one just here. It's an Excel document called Master List.xlsx. Let's click on Open, give it a couple of seconds. And you'll see that that uploads very quickly.

And just remember, if you are uploading a very large document, you might have to wait a few seconds before that will refresh and appear in the Library. So that is the first way very straightforward and very simple.

The second way you can upload files into a Library is by dragging and dropping. And I will say that this is where the browser that you're using comes into play. I know that for some browsers that aren't Microsoft browsers, you aren't able to drag and drop files from File Explorer to upload them. So if dragging and dropping is something that you like to do, and you're using something other than a Microsoft browser, just have a quick check and see if that works for you.

So I'm going to jump back into File Explorer. And I'm kind of going to place it up here so I can see my List underneath. And this time, I'm going to grab this document just here, Excel User Guide, and I'm simply going to drag it from File Explorer into the blank space in the Document Library. And you can see as I'm holding the mouse button down, it says Copy. When I let go is going to copy and upload that file to the Library. So that is method number two.

Now the third method you could use to transfer one file or many files is to synchronize your Document Library with your PC. So currently, I don't have this Document Library synchronized to File Explorer. You can see I have a Personal OneDrive, I have a Business OneDrive, and some other connections just here, but nothing related to SharePoint. Now I'm actually going to reorganize my windows here, because I want you to be able to see exactly what happens when I click on the Sync button in this menu.

So now I have File Explorer in the right-hand side of the screen, and my Document Library in the right-hand side of the screen. Now keep an eye on what happens to my folders in File Explorer once I click Sync. So I'm going to click the Sync button, I'm going to say Open. I'm getting a message saying that I'm now syncing SharePoint Online Training User Guides and take a look at File Explorer, it's created, essentially a new folder called Train IT Now Limited, which is my company. And if I expand it, there is that folder. And if I click on it, it's going to show me basically everything that I have in this Library, so it's essentially like a copy.

SharePoint Online

And what this enables me to do is I basically don't even need to have SharePoint open to upload files. What I could do is open up another File Explorer window. And let's put that in this side of the screen. And if I now want to upload another file, so something like this one just here, this PDF, all I need to do is drag and drop it into the File Explorer folder. So I'm going to grab House style and Branding drag, drop, you can see it's now moved. And if we go back to our SharePoint site, you can see that it's not there just yet.

Sometimes you might have to refresh your browser just to get that to update a little bit quicker. Now I've done that, there is the document. So those are your three methods. You can click the Upload button, you can drag and drop, or you can synchronize the Library to your local PC and work within File Explorer.

Video: Modifying and Editing Documents

Deb: So now that we've uploaded some documents to our Document Library, what happens when we want to modify or edit one of these documents? How does that work?

Well, it's actually pretty simple. So let's say I want to go in and I need to make a modification to the Word User Guide, what I can do is I can click on the link, and it opens the document in Word Online. So this is kind of the slimmed down, Diet Coke version of Word. And you'll see at the top here, it says that I am in Editing mode. So I can come in here and I can make whatever changes I want. So let's just make some minor edits, I'm going to select this first paragraph, let's make that Bold. Let's maybe add some Highlights to this paragraph. And then we'll make this paragraph in Italics.

Now, as I said, in this slimmed down version, and you can pretty much do most things you're going to want to do. But if you really need to do some heavy formatting, or you want to access some of the more complex features of Word, then you're not going to find them in this basic version. What you would need to do in that case is open the document in the Desktop App. And that's a simple case of clicking the drop down next to Editing and choosing Open in Desktop App.

Once you do that, it's going to open that document in the full version of Word. And now I can harness the power of the more advanced utilities. So if I need to go in here and make some more changes, and let's just make these red. Notice in the top bar, it's saving automatically. As soon as that changes to saved, I know I can safely close this down, go back to the Online Version, and just say Continue here. And as soon as that refreshes, I can now see the updates I've made in the Desktop Version. And it really does depend on the types of edits that you're doing. But for most of the basic stuff, editing in this Online Version is going to work perfectly.

So once you've finished making your edits to your document, you can simply close down the tab to jump back to SharePoint. And you can see that in the Modified column, it's telling me that I modified this document about a minute ago. Now what other options do we have when it comes to managing and editing our documents from a Document Library? Well, we have quite a few. So if we carry on using this Word User Guide, as our example, if I hover over, you'll see that we get three dots just here. And if we click it, it's going to open up a Contextual Menu.

So from here, we can do all sorts of things with this file. I can choose to Open in the browser, or in the full Word Desktop App, I can Preview the file before I open it, I can Share it with others, I can Copy the link and also Manage who has access to this file. If I want to maybe Download this file to my PC. So maybe if I know that I'm going to be going somewhere, I'm not going to have great internet connection. So maybe I'm working on a train or I'm at an airport and I need to work on a file, I could download it so that I'm not relying on an internet connection to access the document. I can Delete it, I can Rename it, I can do things like Pin it to the top of the List.

So if this is a particularly important document, I could say, Pin to top. And now it appears up here. What you'll also notice is that when I hover over this Word User Guide, if I actually select

it, by putting a tick in this circle, you'll notice that the horizontal menu running across the top also changes. So now, it's displaying many of the options that we just saw in the Contextual Menu across the top of the screen just to make it a little bit easier for you to see what you can do with this file. So, so many different options when it comes to modifying and editing any of your documents in your Document Library.

Now I want to finish off this lesson just by talking to you about Co-authoring and the Check in, Check out process. Now these days when you're using Microsoft applications, everything's integrated, and we have Co-authoring. And what that means is basically, I could open this Word User Guide, and somebody else who also has access to this file in SharePoint could open the same document at the same time, and we could both work on this file making different edits. That is what we mean by Co-authoring.

It's just the process of having multiple people in the same document making edits all at the same time. And Co-authoring is a great feature because it enables teams to come together and collaborate on documents. Now whilst Co-authoring is a great feature, there are times when you might not want other people to be able to get into the document whilst you're editing it. And if that is the case, and you essentially want to lock it to yourself editing, you can check it out instead of just simply opening it. So let's take a look at that process.

To check out a document and I'm going to use the same one to keep things consistent, if we click the three dots, we want to select More from this Contextual Menu, and the last option here is check out. And you can see that I'm getting a message that I've checked out one item. And what you'll notice is that there's now a little red arrow next to that document. And when I hover over it, it's saying; "You checked out this item so others cannot edit".

So anybody else who is a member of this SharePoint site, if they're looking at this Document Library, and in particular at this document, they can see that I've currently got it checked out, which means that they're not going to be able to open it and make any changes. Now once I've finished editing this document, I'm going to need to check it back in which will essentially release it and allow others to edit it again.

Now, I can check it back in by clicking this link just here. Alternatively, if I go back to the three dots, and into More, you can see I have check in just here. I also have an option to discard the checkout. And that will basically discard any changes that I've made since I've checked it out and checked that document back in again. Now I'm just going to check this back in, and I can now type in some comments describing what has changed in this version of the document. So what did I do in here? I added some formatting. So let's just say; "Formatting changes made to paragraphs", and check in. That document is now checked back in and other people can now edit.

Video: Metadata

Deb: Now I've been using and training SharePoint for more years than I'd like to admit. I definitely remember right back at the beginning of SharePoint when people started using it for the first time, it was generally treated just like a place to store documents.

So the way that people tended to use it was very similar to something like OneDrive or other cloud storage, or even just like File Explorer. People would upload folders, they would upload files, they understood that it was somewhere where they could upload those types of things, and other people could access them. But with regards to all of the other different things that you can do within SharePoint, those kind of got a little bit lost.

Thankfully, things have changed and people's knowledge about SharePoint is now progressing. And people are recognizing that there is so much more you can do with SharePoint than just store documents. Now staying on the topic of Document Libraries, we've seen how we can upload documents, we've seen how we can edit documents, but what about when we're looking for things within SharePoint, when we're searching? Well, I want to start out by showing you an example in File Explorer.

So once again, I'm currently just in the SharePoint Online Training User Guides folder. But I'm in File Explorer, as opposed to SharePoint. And the reason why I'm in here is because I just want to show you something a little bit more familiar, and then we'll translate it to how that works in SharePoint. Now, the thing you have to remember when it comes to searching in SharePoint, or pretty much any application is that you're basically searching Metadata.

And Metadata is essentially keywords behind the scenes that you can use to find the files that you need. And just to illustrate that a little bit better, what would I do if I needed to search for a particular file in this folder? Maybe I'm only interested in the Word documents. So how would I search for that? Well, there's a couple of different ways I can do it from within File Explorer, the most obvious is I can look across, and I can see that I've got a Type column just here. And if I click the drop down, I can say, Yep, I only want to see Microsoft Word documents. And it basically runs that search, and I get my result.

Now, Type is Metadata. All of these column headings are Metadata, they hold information about the file, that's going to help me find it. And there are so many more pieces of Metadata for each of these files than the ones that you can see here. And in the next lesson, I'm going to show you how you can really customize the columns and the Metadata that you're looking at. So how does that translate SharePoint? Well, if I go back to my Document Library, if we take a look, you can see that here, I don't actually have a Type column.

Now we're going to deal with that in the next lesson, we're going to add that Type column in. But if I don't have a Type column here, can I still extract from this List just the Word documents? Well, yes, I can. Because right at the top of the screen, I have a big old search bar that currently says Search this Library. And I can click in here. And if I just want Word documents, I can type

SharePoint Online

in docx. When I hit Enter, it's going to search through that Library, and it's going to show me both of those documents.

And SharePoint is using Metadata in order to be able to perform that search. So by default, if you just add a brand new Document Library into SharePoint, you're going to get these pieces of Metadata. And in the next lesson, we're going to expand on that by adding in some more columns and Metadata to make our Library a lot easier to search.

Video: Creating Custom Library Views

Deb: When you add a Document Library, it's going to come with these default standard columns. So for me, that is Name, Modified, and Modified By. But maybe I want to know a lot more detail about each of these files. Maybe I want to know the team who's responsible for maintaining these files.

So what I can do here is much like Lists, I can add columns. And if you can remember how this worked when we were looking at Lists, then you're pretty much 85% of the way there because it is very, very similar. So let's click the drop down. If you remember, we need to pick a Data type. Now this column is going to List out the department that's responsible for these documents. And I want to control the information that's going into this particular Library. I don't want people making typos or spelling mistakes.

So I'm going to say Choice, let's give the column a name. So I'm going to call this Team, my Type is Choice, and then I can enter in the choices. So our choices are going to be Team 1, Team 2, Team 3, and let's just add another one, Team 4. And I don't want anyone to be able to add values manually. And I don't want to have anything as the default value. Let's click on Save, and there is the new column. And remember, when you add a new column in and you already have existing documents sitting there, you're going to need to edit in Grid View, and then you can go in and add the team.

So let's say Team 1, this one's going to be Team 3, this one will be Team 2, and this one, Team 4. Once you're done, exit, the Grid View, it's going to save those changes, and everything will update. So not only have I added a new column into this Library, I've also added a whole new set of Metadata, and that is the team. So now if I wanted to search just for the documents that Team 3 were responsible for, I can go up to Search this Library at the top, and type in Team 3.

Now let's take a look at what happens if I just type in Team 3 and hit Enter. It's not pulling back what I was hoping because it's also pulling back Team 1 and Team 2. And that's simply because I have a space in here. So what you need to do in this case is if you surround it in quote marks in the Search bar so it knows that that is all one word, and it's the term it should be looking for, when you hit Enter, it's going to pull back the correct result.

So the main takeaway here is that when you add new columns, you're essentially adding additional Metadata into your Library. And of course, another way that I could extract just the information for Team 3 would be to utilize a filter. So if I click the drop down next to Team and go to Filter by, I can then select Team 3, and it's going to show me the correct result. So a couple of different ways that you can extract exactly what you're looking for. And remember to bring everything back, we're just going to remove or clear the filters. So that is custom Metadata.

It makes us more efficient with organization and more effective when we're searching for documents. So now that we understand that, let's again, do something that we did with Lists and create ourselves a Custom view to look at specific things. So let's use a similar example. And in fact, what I'm going to do first is I'm going to just create another new document, let's do a Word

document. I'm going to put some junk text in here, let's just use our random command again, just to get some text in there. I'm going to name this file, let's name this PowerPoint User Guide. Once it says saved up here, I know I can safely close this down. And in a moment, that document will change to PowerPoint User Guide, and there it goes.

Now currently, I don't have a Team assigned to this User Guide. So let's go in and do that. Edit in Grid View is the quickest way, and I'm going to assign this to Team 1. Let's exit the Grid View. And this time, I'm going to create a brand new view that's going to quickly show me all of the documents that Team 1 are responsible for. Now, if you remember back to when we were looking at Lists, you'll remember that some Lists come with their own Custom views, and some don't. And it's similar for Document Libraries as well.

So over on the right-hand side, you can see here currently I'm showing All Documents that is the current view that I'm in. If I click the drop down, which is using the default template, I don't actually have any other views. The only option I have is All Documents. So let's go in and create a new view. I'm going to give this view a name. And let's say, I'm going to call it Team 1 Responsibilities. I'm going to show this as a List, and I'm going to make this a Public view so that anybody who has access to this SharePoint site can also utilize the view. Let's click on Create, and the new view has now been created.

You can see over here it says Team 1 Responsibilities, but I need to modify this view. So let's go down to Edit Current view, because we need to add in those filters. And if you remember, at this stage, we can also customize the columns that we want to see. So let's add in a couple more things. Maybe I am interested in who created this document. Maybe I'm also interested in the File Size of this document. Let's scroll down to the Sort options. So do I want to sort on a column?

Well, not really, because it's going to sort it in ascending order anyway. So, I'm just going to leave it like that. But I do want to apply a filter because I'm only interested in documents that Team 1 is responsible for. So I want to say here; "Show items only when the following is true". So only when the team is equal to Team 1. And that's all I'm going to do. Let's click on Ok. And that looks much better.

Let's check to make sure that that is actually working because I can now toggle between All Documents and then the new view that I've created, Team 1 Responsibilities. And what we should also see is that I have those two additional columns for Created and File Size added in there. And by doing this, once again, I have essentially added more Metadata into this Document Library. So if I click Created, I can now filter by and because I've created both of these documents today, that's the only option I currently have.

Video: Version Control

Deb: Now one setting we haven't delved into in any great amount of detail currently is Versioning. And if you're not familiar with Versioning, or you're not really sure what it is, it's basically just a way to keep track of a document every time it changes. So for example, I might create a document as I've done here. And when I create it, that document is going to be the original document.

If somebody else in my team then jumps into SharePoint and opens up that document and makes a change, that new edited document would become Version two. And the cool thing about SharePoint is, you don't really need to put too much thought into this because SharePoint creates the Versions for you automatically. And you can specify if you want to have Major Versions, such as Version 1, 2, 3, 4. Or if you want to have major and minor Versions. So you might have a Version 2, a Version 2.1, a Version 2.2, so on and so forth.

And if at any point, you want to roll back to an earlier Version, so maybe somebody has changed something accidentally, you can do that as well. So Versioning is basically just the ability to create new Versions whenever a document changes to be able to track those changes, and reverse them if required. So let's take a look at how this works.

Now I'm going to stay within my User Guides Document Library. And something that's going to be really helpful to me here is to add a column that shows the Version of the document. So what I'm going to do here is I'm going to modify this view. So let's jump up to where we have All Documents. And we're going to say Edit current view. And we're just going to display the Version column. So let's take a look, it should be right at the bottom. There it is. Let's turn that on. Click on Ok, and now I can see my Versions.

And you can see that some of these are Version 2, this one is Version 3, and this Word User Guide is currently Version 6. Now the cool thing about this is that for anybody coming into this Document Library and simply clicking to open one of these files, they're always going to access the latest Version. There is no easy way for them to accidentally go into Version 5 or Version 4 of this Word User Guide. Now what about if I do want to see older Versions of this particular document?

Well, what I can do is I can click on the three dots. And in this Contextual Menu, we have a Version History option. And this is going to show me all of the different iterations of this particular document. So this one down here, Version 1 is the original. And then we have all of the times I made changes. And if you remember, when we did the last change, I actually added in some comments, so you can see them sitting there; "Formatting changes made to paragraphs".

So what about if I wanted to rollback to one of these previous Versions, let's say something like Version 4? Well, what I can do is I can come in here, I can click the drop down, and I can choose to View, Restore, or Delete. Now, I would always recommend that you view your document prior to restoring it just to make sure that you do have the correct Version. Once you're happy

with that, you can click on Restore. And you can see here it says; “You're about to replace the current Version with the selected Version”. So let's click on Ok.

Now what it does here is it doesn't actually overwrite anything. So Version 6 didn't get overwritten with Version 4, it just creates a brand new Version, Version 7, but that is going to essentially be in the state the document was in when it was Version 4. And you can also see right at the top, if I wanted to delete all the Versions of this document, I've got a button there to do that. And I can actually delete any of these different Versions.

Now in general, I don't tend to delete Versions too often, because I like to keep track of all the different iterations of my documents. When it comes to actually restoring and creating new Versions very, very simple. So I would recommend when you are creating new Document Libraries in SharePoint that you do, always make sure that that box is checked to turn Versioning on.

Now another thing I would suggest that you have a little look at is the Version Settings. So once again, let's jump up to our cog in the top corner and jump into our Library Settings. And you'll notice that the second link down we have access to all of our Versioning Settings. And I just want to draw your attention to Document Version History. So over here, it says; “Create a Version each time you edit a file in this Document Library”. And currently I have mine set up to always create Major Versions.

So that means it's going to be Version 1, 2, 3, 4 so on and so forth. But I could choose to create major and minor draft Versions, so 1.0, 1.1, 1.2, so on and so forth. So this is useful if you are maybe making minor little changes to documents, you could have those as the Minor Versions. And then once all the minor changes have been done, you might then want to have a Major Version of the document. It really depends what your workflow is and how you like to work. And underneath, you can specify the number of Major Versions you can have. And you can see that we have loads there 500.

Now, I'm not going to make any other changes here, I am going to keep on create major and minor. Let's scroll down and click on Ok, and let's take a look at how this affects our Document Library. So I'm going to go back to User Guides, and let's make a change to our document. So we're going to stick with our Word document, I'm going to click to open up, and I'm going to add in some text, let's just say; “Hello world”. I'm going to wait for that to change to save. Let's close it down.

And just to make this a bit quicker, I'm going to refresh the browser and you can now see that instead of Version 8, this is now Version 7.1. Now if at a later time, I then decide that I want to convert this to a Major Version. So I want this now to be Version 8, all I need to do is click the three dots, go to More, and select Publish. I can then type in some comments describing what has changed so let's just say; “Added hello world”, and click Publish. And now that's changed the next Major Version which is Version 8.

Section 5 – SharePoint Notifications

Video: SharePoint Notifications

Deb: One of the main aims of SharePoint is to make content more accessible. And one way to do this is by creating email Notifications. So for example, if somebody adds a new item to the Calendar, or maybe if somebody modifies a List or a document, you want to receive an email Notification so that you can keep on top of all of the changes that are occurring. So let me show you how to set up Notifications.

Now for this, I'm going to jump into one of my Lists. And I think I'm going to choose this one here, the GlobalTeach Issues List. So this is the List that I'm using to track any issues that we come across on this particular project. So, this would be a pretty good candidate for Notifications. I definitely want to know if anybody adds a new item to this List, because it might be something that I need to investigate. So what I'm going to do here is I'm going to create a Notification on this List. And it's worth noting that you can create Notifications on a specific item, or the entire List.

Now the way that you do this differs depending on if you're using the Modern or the Classic Experience. I'm using the Modern Experience on this page, so let me show you how you do it from here. It's very straightforward using the Navigation menu running across the top right on the end, click the three dots, and you have an option here called Alert me. So let's jump into there and see what we get.

So this is going to take me into the Alert me dialog box. And there are lots of different things that we can specify in relation to how we want to receive these Notifications and when we want to receive them. So let's run through some of these, we have the Alert Title. And this says, "Enter the title for this alert. This is included in the subject of the Notification". Now I'm going to keep mine on Global Tech Issues. That's explanatory enough for me.

I can then customize or specify who these alerts are going to go to. So who is going to receive this email Notification. Now currently that's only me, but if you wanted to add in more team members, you can. Just click in the box and add them in there. I can then choose the Delivery Methods. So how do I want to receive these alerts, these Notifications?

Well, I want to receive mine via an email. But I do also have the option of a text message. So if you would prefer that, select that option and pop your number into that box. Now Change Type, this is really important. So here you get to specify the type of changes that you want to be alerted to. You don't necessarily always want to be alerted to every change that occurs in a particular List or Library or on a Document.

So with this specific List, it says, "Only send me alerts when". And then currently, the default is All changes. So if any changes are made to this particular List, I'm going to receive an email alert. Now one thing to be careful of here is that if you do have a lot of members of your site, and

people are jumping in here all the time and making changes. If you're constantly receiving Notifications, then that can get a little bit annoying. So be quite specific in the types of changes that you want to be notified about.

So it might be that I'm only notified when a new item is added. So when a new issue is added to this List, I'm gonna get a Notification. But that is it. Or maybe I'm only interested in when existing items are modified. Or maybe I just want to know if somebody deletes something from this List. So it's going to be beneficial to you to be a little bit more specific in this particular section.

Now I'm going to leave mine on All changes because it is the default. And in the next group, I can get even more specific about when to send these alerts. So currently, it's going to send me an alert when anything changes. Alternatively, I could get an alert when someone else changes an item, or when someone else changes an item created by me, or when someone else changes an item last modified by me. So again, make your selection in here. I'm going to leave mine on anything changes.

And then finally at the bottom again, a really important thing to specify; When to send alerts. So this is where you specify the frequency that you want to be alerted. So if you want to receive an email Notification as soon as something changes in this particular List, select the first option and you'll get that immediately. Now again, as I said, if you have a library or a List where there's lots of changes occurring all the time, you might not necessarily want to receive those all immediately.

It can sometimes be a little bit more efficient to choose to send a daily summary or a weekly summary. So if I was to select a daily summary, I can say I want to receive them today, and then I can pick a time. So maybe towards the end of the day, maybe at five o'clock just before I go home, I want to receive an email that's going to show me all of the changes that have been made for the day. And if that's a bit too frequent for me, I have an option to send a weekly summary as well.

Now just for purposes of demonstration, I'm going to change this back to Send notification immediately and click on Ok. Now because I've set up alerts on this particular List, let me just show you what happens. If I open up Outlook, you can see here I have just received an email that's letting me know that I've set up an alert on this particular List. Let's also test this out and make sure it's all working by adding another item into this particular List. So, let's add an issue.

So let's say that there is no sound in one of the training tutorials. I could add a longer description in here, I won't. Let's set that priority as high. The status is new, I'm going to assign it to myself. Let's enter in a date. So I'm going to do tomorrow's date. And that's pretty much it. Let's just click Save. So now that I've added a new item to this List, I should also receive an email Notification.

So let's quickly jump back to Outlook. And you can see there that email has just come in. Here it is, I can see some brief details in the email. And that's just going to remind me that that's

something that I need to deal with. Now I just want to briefly show you how this works in the Classic Experience.

Now what you'll notice, and you'll see this at the bottom on a lot of the Modern Experience pages, you have an option to return to Classic SharePoint. So I'm going to switch to Classic SharePoint just for one second. And you can see we get that kind of old school looking interface. I still have all of these same List items just here. But if I want to set up an alert from the Classic view, I would need to use the ribbons at the top.

So if I jump to the List ribbon, you can see in Share and Track, there is Alert me and I can say set alerts on this List. And it's gonna take you into the same kind of window. Fill out your fields, and that is pretty much it. I'm going to exit my Classic Experience to take me back to how I was and I would encourage you to have a little play around setting up alerts on different items in different Lists.

Video: Creating a Discussion Board

Deb: So far in this course, we've spoken a lot about different types of Lists that you can add to your SharePoint site. And we've seen that pretty much all of the Lists that we've created have been based on templates. And these Lists basically help us store information inside SharePoint.

Now we're going to continue on with this subject of Lists, but I want to show you a different kind of List template. And that is the Discussion Board. Now, you may or may not be familiar with how Discussion Boards work. They've been a very popular way of collecting feedback and comments or asking questions for a number of years. And, Discussion Boards can often be a more efficient way of getting feedback from your colleagues.

For example, if I have a specific question that I need to ask everybody in my team, I could send out an email and wait for everybody to respond. But if I send that email out to a large amount of people, it means that I'm going to have additional work collating all of the responses. What would probably be easier would be to start a topic or create a discussion in my SharePoint team site.

And not only does that cut down the amount of work that I'm having to do, it also allows everybody in the team to see other people's answers, replies, and comments. So, it's a really effective collaboration tool that makes your data more accessible. So let's take a look at how we can create a Discussion Board. Now because this is a List, we're going to add it in the same way that we would add any other List.

So let's jump up to our Top Navigation bar, click the drop down next to New, and for this, we're going to go down to App. So this screen should look pretty familiar. We've been in here a couple of times before. All of these tiles are the Lists and Libraries that we can add into our SharePoint site. And if I scroll through this List, I'm looking for a very specific one, I'm looking for one related to a Discussion Board. And I can see it just here. So let's click on Discussion Board, SharePoint is going to go away and create that for me. And now I can choose a name for my Discussion Board.

So I'm just going to call this let's just call it Project Questions, and click on Create. And there we go. Here is our new Discussion Board ready for us to post some questions. And this works in a very similar way to a standard of forum that you might find online. For example, if you go to the Microsoft support site, there'll be a community forum there where you can ask a question, maybe you have a query about SharePoint or another Microsoft application. And then other people can post replies to that. And this works in exactly the same way.

So all I need to do in here is start a new discussion by clicking the button. So the first thing I need to do here is type in a subject and you can see with the Asterisk, this is the only mandatory field. So I'm going to give this a subject of Training Locations. And then the body I'm going to type in my question. So I'm going to say, "Should we extend our training plan to our North American offices"?

Now because this is a question, I'm going to click the question box underneath, and then click on Save. And that's going to post that question to the message board as a new topic for discussion. If I click on it to go into it, you can see what that looks like. And now anybody can jump into here and reply to this discussion. And the cool thing about this is that instead of this being in Outlook as an email that I sent out to people, it's now in SharePoint with the rest of the related content.

Remember, SharePoint is very much a one-stop shop for absolutely everything. If I now jump back to Home, you'll see that by default, again, my Discussion Board isn't included in my Quick Launch Menu. I'm not going to add it but if you did want to add that in, remember, you just need to go into Site Contents, which is going to display everything in your site, find your Discussion Board, there it is just there. And you can click the three dots and jump into Settings.

And from here if you go to List Name, Description, and Navigation, this is where you can choose if you want to display this on the Quick Launch. So you know what, in fact I am. Let's just say Yes, and click on Save. And now when I go back to Home, I should find that I have that at the bottom. There it is, Project Questions.

Video: Exporting Lists to Excel

Deb: Another way that we can extend the capabilities of SharePoint is to take data from a SharePoint List and integrate it into another application, such as Excel. We can export data to Excel or Access, and then we can share it with other clients, co-workers, or external people. And I hope what you're finding as we're going through this course, is that there is so much integration with other Microsoft applications.

We've already seen Outlook Integration, we've seen a little bit of Excel, and we're going to see a bit more in a moment. And we even have integration with things like OneNote, and Teams. And we haven't really touched on this much so far. But just to show you very quickly what I'm talking about, if we go to our Quick Launch Menu, on the left-hand side, we haven't really spoken too much about three of these links; Conversations, Teams, and Notebook. And all three of these linked through to other Microsoft applications.

So for example, if I click on Conversations, this is going to link me through to Outlook. And what this will do is it's going to open up my Outlook account. And if I scroll all the way down to the bottom of my Folder List, you can see that it's created a new Outlook group for me called SharePoint Online Training. So this is my SharePoint group. And when I've created the site, it's automatically created a group in Outlook for me. And from here, I can further collaborate with team members through Outlook as well. So it's keeping those Conversations, essentially, within SharePoint.

What about this Teams link? Well if I click on this, this is going to take me through to Microsoft Teams. And once again, if we take a look down at my Teams, on the left-hand side, you'll see at the bottom here, I have one called SharePoint Online Training. And I have a general channel underneath. And this was automatically created for me when I created the SharePoint Team site. So again, this is integrated into SharePoint, a one-stop shop.

And the final thing here is Notebook. And this is going to jump me through to OneNote online. And if you've never used OneNote before, this is basically an electronic notetaking application. And it's particularly useful if you're working on projects or attending team meetings, and you want to store notes.

Yet again, it's created a brand new Notebook for me called SharePoint Online Training. And this was also created when I created the SharePoint site. So all of this was done automatically for me. I didn't have to come into OneNote, or Teams, or Outlook and create any of those Groups, Teams, and Notebooks, it was all automatically done at the point of the SharePoint site creation. So don't forget that you have those in that Quick Launch Menu as well.

And just to stay on this topic of integrating with other MS applications, I'm going to show you how you can export things like Lists out to applications like Excel and Access. So the first thing I'm going to do here is jump into one of my Lists, let's go for the GlobalTeach Contacts List. Because I have quite a few records in here.

Now what you'll notice is running across in the Top Navigation menu, I have an Export button. So I can export this List out to an Excel workbook or a CSV file. Now if I export this out to Excel, it means that I can then harness the full power of Excel functionality and do other things with my List. So maybe I want to do a more advanced Sort and Filter, maybe I want to perform some Calculations, maybe I want to create a PivotTable or a PivotChart to analyze the data. All of these things become available to me if I export this data out, and it's a very simple process.

So let's click on Excel workbook. And you can see I now get a little downloads pane in the top of the screen. And you can see it's downloading a query and the file extension there is .iqy. And that basically stands for Internet Query File. And this type of file basically creates a connection between the List in SharePoint and Excel. And that's an important piece of information to know for a bit later on. So let's click on Open File, and there we go.

Excel is trying to open I'm getting a little security notice because it's recognized that this is a query file. I know where this is coming from so I'm gonna say Enable. Now the file that you see on the screen here is one that I already had open in Excel. So this isn't my contact data. I have this import data window just here and it's asking me how I want to view this data in my workbook.

So I can choose to import this in as an Excel table, a PivotTable report, or a PivotChart. And I can choose if I want to put this data on the existing worksheet. So this one that I have open behind, a new worksheet, or a new workbook. Well, I'm going to leave it on the default for both of these, I want a new Excel table, and I want to put it in a new workbook. So let's click on Ok. Excel is going to go away, and it's going to import that data. And there it is, I have it structured in an Excel table.

Now, I mentioned a couple of minutes ago that we were creating a connection between SharePoint and Excel, and I told you that that's going to be important a bit later on. And the reason why this is important is because when it comes to updating, because we have a connection between the two, if I add a new record into my SharePoint List, it should automatically update in this Excel spreadsheet. So let's test this theory out and see if it works. So I'm going to minimize my Excel spreadsheet, and the one behind, and let's add a new contact into this List.

I'm going to click on the New button, and as I do have a little bit of a Game of Thrones theme going on here, let's carry on in that same vein. I'm going to add my favorite character, I was very sad when he died. And that is Jorah Mormont. And I think that's how you spell it. Let's give him an email address. And that's all I'm going to add. I'm not going to go mad here. We've seen how to do this before, because all I'm really testing here is that when I add this record in, that it updates in that Excel spreadsheet. So let's click on Save to add this record, I can see there it is in the middle. Let's go back to our Excel spreadsheet. And it was this one just here.

Now you'll notice that it hasn't actually updated itself. And that is because you need to click a button in order for this table to refresh. So click somewhere within the Excel table. From the Table design ribbon, in the External Table Data Group, you have a Refresh button. Look what happens when I click Refresh. It's added in that record and now we have Jorah Mormont.

Now it's worth noting here that this refresh of the connection to update the data is only a one-way connection. And what I mean by that is if I was to add a new record into the Excel table, and then try to get that to refresh in SharePoint, it's not going to work. So it's a one-way refresh from SharePoint to Excel. Now I've demonstrated exporting to Excel using the Modern Experience, I'm very quickly going to switch across to the Classic Experience and show you how you do it from there.

So once again, right at the bottom here, I have a little link that says [Return to Classic SharePoint](#). We still have our Contacts List there in a slightly different format. But if I want to export this List out to Excel, I have to use the ribbons at the top. So if I click on the List ribbon, in the Connect and Export group, it's this button here, Export to Excel. And from this point on, it's pretty much exactly the same process. SharePoint creates a query file, and because I've already created it, it's giving it a number one to show that it's a duplicate. I can then open the file in Excel and do whatever I need to do with that.

So, that is a little bit more information as to how SharePoint integrates with other Microsoft applications, and also how you can export your data out into an Excel spreadsheet.

Video: Connecting SharePoint to Outlook

Deb: Let's stay on the topic of integrating SharePoint with other Microsoft applications for just a moment longer. Because what you'll also find is that you can take a List in SharePoint and integrate it with Outlook. As we all know, Outlook has an Inbox, it has a Calendar, it also has Task . And we have similar things in SharePoint, we have already created our own Calendar. And we have created Task Lists.

So essentially, if you imagine I'm working away, I'm sort of running two duplicate sets of information. I have my Outlook, which contains Calendars and Tasks. And I also have SharePoint that contains Calendars and Tasks. Now, the distinction between the two would be that in general, the one in Outlook is just for me. So that's going to be my Calendar and my Task Lists. Whereas the ones in SharePoint are in a shared environment. So more like Team Tasks and Team Calendars.

But the ones in SharePoint still have relevant information for me. So, I still might have Tasks assigned to me in SharePoint Lists. I might have meetings in the Calendar in SharePoint that I need to attend. So there is still information that's relevant to me in SharePoint as well. So instead of me jumping backwards and forwards between the two different applications, it's good to get them to work together. So what I'm going to do here is I'm going to integrate my SharePoint Calendar with Outlook.

So the first thing I want to do is go to my Calendar in SharePoint. So let's click on the GlobalTeach Calendar link. And this particular List, this Calendar shows in the Classic view by default, so I have some ribbons at the top. Let's click on the Calendar ribbon. Now the option that I'm looking for is in the Connect and Export group. And it's this one just here, Connect to Outlook. So let's click it and see what happens.

So the first thing I get is a little message that says this site is trying to open Outlook. So I'm happy with this, I'm going to click Open. And then I get a message that says; "Connect the SharePoint Calendar to Outlook". Well, that sounds like exactly what I want to do. So let's click on the Yes button. And there we go. Take a look at what happens, I now have my personal Calendar on the left-hand side. And I now have my SharePoint Online Training Calendar on the right-hand side, so I can see both of them at the same time. And this differs slightly from the last lesson where we were looking at exporting SharePoint Lists out to Excel. If you remember, that was just a one-way connection.

When it comes to Outlook and the Calendar, this is a two-way connection. So if I add an event into the SharePoint Calendar in my Outlook, it's going to update in SharePoint as well. So let's just test that out. Let's add in something for tomorrow. So I'm going to double-click to open the 16th. And let's just say I have a Project Meeting. And this is going to be from 9:30 to 11:30. Save and Close. So what I expect now is for this to also be added into my Calendar in SharePoint.

So let's go back, I can't see it there at the moment. Sometimes you do need to refresh your page to get that to come through a little bit quicker. So I'm going to refresh the browser. And there we

go. It's now updated. And there is my project meeting. Now if we just jump back to Outlook for one moment, what do you do if you want to get rid of your SharePoint Calendar from your Outlook? Well, there are a couple of ways you can go about this.

If you take a look in the bottom left-hand corner, this is where you select which Calendars you can view. So I've got my Calendar selected, and also the SharePoint Online Calendar. So I could just untick this box and it's going to remove it, and it's going to remove it from my view. Now it hasn't actually deleted it. If I click the box again, it's going to bring that back.

If I want to permanently remove it or essentially break the connection between Outlook and SharePoint, if I right click, I can say Delete Calendar. I'm going to click on Yes, and that gets rid of the Calendar from my Outlook. It doesn't get rid of the Calendar in SharePoint, it simply broke the connection.

Section 6 – Workflows Explained

Video: Workflows Explained

Deb: As we've already seen in this course, SharePoint is a great tool to help us become more efficient as we collaborate with other people. And there's something that we haven't looked at yet, which is a really great feature. And that is Workflows. What Workflows allow us to do is essentially automate different types of business processes.

For example, maybe you are the manager of a team, and you are responsible for approving all of the holiday or vacation requests from your team members. So what might that business process look like currently? Well different organizations do this in different ways. Some have a dedicated system for booking holidays, others do it in a more manual fashion. So maybe your team members just send you an email requesting days off. You as the manager then have to look at your team calendar, and then either approve or reject that holiday request. And that approval or rejection might again, take the form of an email.

Now, that is one very simple example of a business process that you could automate using Workflows in SharePoint. Now, the business process that we're going to explore in this section is the Approval Workflow. So maybe you work in a sales team, and you've created a sales pitch that you'd like to send out to prospective clients.

But before you do that, you need to get the approval from your two managers. Once they've both approved that document, then you know, you can send that out. So what does this process look like if we're doing it manually?

Well, it might be that we share the document with the managers, and that might be in the form of an email attachment, or maybe you'll upload it to the cloud, something like that. And then basically, you can't really see what stage of the approval process that document is at until you get some form of communication back from them, that they've either approved or rejected the document. So your visibility through this process isn't great. So how can we make this manual process more efficient using SharePoint?

Well, we can set up an Approval Workflow. This will automate the entire process and much more. For example, when you set up a Workflow in SharePoint, you can choose who you want the emails to go to, it will also create tasks for these individual approvers. And the best thing is that it creates a history list so that you can see the different steps of the Workflow and what stage the approval is at.

So it gives you a lot more insight into things like bottlenecks, who's holding up this approval process, and you can then maybe send a quick nudge to a colleague who is being a bit slow in approving a step.

So that's what we're going to do in this section. I'm going to show you how to create an Approval Workflow, how you can automate it, and also how you can manually trigger Workflows.

Video: Triggering a Manual Workflow

Deb: In this lesson, we're going to take a look at how you can use Power Automate, which is a little app in Microsoft 365, to set up Workflows in SharePoint. And the example that we're going to be using is the Approval Workflow. So let's set up our scenario. Maybe you have a document stored in your Document Library that needs to be approved by your manager, team leader, or maybe even a client.

Well, what we can do in SharePoint is we can really harness the power of Power Automate, set up a Workflow and trigger it manually whenever we need it. So let's take a look at how we do this. Now there are a couple of different ways to set up a Workflow. But by far, the easiest way is just to use the Top Navigation menu. Now at this stage, I don't need to select the document that I want to send through the Workflow, I just need to create the Workflow first of all, and then I can run a document through it.

So using the Top Navigation menu, we're going to go all the way over to the three dots. Let's go down to Automate, and Power Automate. And you'll see one of the options that we have there in the menu is Create a flow. This is going to open a pane on the right-hand side of your screen that's going to show you all of the flow templates related to SharePoint. Because there are so many different types of Workflow that you can set up. And which one you choose really depends on the kind of business process you're trying to automate.

Now I'm going to click Show More at the bottom just so I can see all of them. And let's scroll through and try and find one that relates to what we're trying to do. We're trying to approve a document. And I think if I scroll all the way to the bottom, this is the one that I'm looking for Request Approval (everyone must approve for a selected file). Now you'll notice that two above, we have another one that's very similar that says Request Approval (first to respond for a selected file).

Now the difference between these two is that if you need your document to be approved by multiple people, this first option just here where it says first to respond, the Workflow is going to wait for the first person to either approve or reject the document before it sends it to the next person. Whereas the one at the bottom is just going to send the document out to everybody in one go, and they can approve or reject as needed.

So I'm going to select this bottom option, let's click, and SharePoint is going to jump me across to the Power Automate application. And this is another one of those little applications that you may or may not have explored too much within Microsoft 365. I can see the Workflow name at the top, just double-check to make sure that that is what you're trying to do. And if we scroll down, I get this area at the bottom that's going to tell me which applications this flow needs to connect to in order to run. So I can see here that it needs to connect to Office 365 Outlook.

Now, that makes sense because this Workflow is going to send out emails, so it needs to connect to Outlook. It's also connected to the Approvals Application, and it's also connected to SharePoint. In the second column, it's showing my login credentials for each of these

applications. And it's really important here that you make sure that you have a green tick next to each of these because this basically tells me that I am signed in with a valid account.

Now if you have a cross in any of these, it means that you're not currently connected. So if you do see a cross, just make sure that you sign into whichever application it applies to, so that the Workflow can run correctly. Now I'm happy with all of that, let's click Create Flow at the bottom. So once it creates the flow, it's going to jump you to the details page. So this first area just here gives you a little bit of detail about this particular flow, I can see that the status is currently on, I can see when it was created when it was modified. And it says type instant.

So this basically tells me that this is a Manual Workflow as opposed to an Automated one, I'm going to trigger the Workflow, it's not triggered by an action within the system. On the right-hand side again, I can see all of my Connections. And this is always a good area to check. If you find that your flow isn't working for some reason, you might come in here and find that one of these has logged itself out and you need to log back in again. And then at the bottom here we have a 28-day run history.

Now currently, this is empty because I haven't run this Workflow yet. But you'll see in a moment after we do run it, this is going to populate and it's going to give me some information about the Workflow including the status of that flow. So this is really useful if you want to see the flows that you've run and if they were successful or not. So basically, this flow isn't going to do anything until I trigger it. So let's do that. I'm going to close down Power Automate and jump back to my SharePoint Document Library.

So now I'm going to select a document that I need to be approved. And we're going to say that I need to get the Training Budget for Q1 approved by my manager. So let's select the document, and let's send it through our new Workflow. Once again, up to the three dots, down to Automate, and take a look at what we have now. It's picked up the Workflow that I've just set up. And that is Request Approval (everyone must approve for a selected file). So I can simply select my Workflow from here to send this document through. So let's select.

So now I get this little pane on the right-hand side, which is going to allow me to define the parameters for this flow, because I haven't told SharePoint who this flow needs to go to, who is approving this document. Once again, it's going to make sure that I'm connected to all of the relevant applications. Let's click Continue at the bottom. And this is where I can add a message and also specify who needs to approve this document. So I'm just going to say, Please review this file. The approvers, well, I am just one person sitting here. So I'm going to send this to myself, just by typing my name in and selecting from the list.

I'm not going to send any approval reminders. But you could do if you wanted to. If someone was being a little bit slow in approving it, you could set up reminders. I'm simply going to run the flow. So essentially, what I've done there is I've manually triggered the Workflow. Now as the approver, you'll notice that I've just got a notification there from Microsoft Teams. So I'm gonna get a message in Teams telling me that I have a document to approve.

So if I actually jump across to Teams, and we can do that very simply from SharePoint by clicking the Teams link in the Quick Launch Menu, you can see that in my Approvals area, right at the top, there is my document; Please approve Training Budget for Q1. Status is Requested. And if I happen to be working in Teams, I can simply click on it. And then right at the bottom, I can review the document by clicking the link just here, and I can cancel the request, reject, or approve. So you could do this from Microsoft Teams.

But I'm also going to get an email notification in Outlook. So let's switch across to Outlook. And right at the top here, you can see there is the email. I have a link to the Training Budget for Q1. So I can have a quick read before I decide if I need to approve or reject this item. And at the bottom here, we have Approve and Reject. Now before I select one of these choices, let's just jump back to Power Automate for a moment.

Now for this, I'm going to click the app launcher, and I'm going to open up the Power Automate application in a new window or in a new tab, I should say. Now, if you want to see all of the Workflows, in this left-hand menu, click on My Flows. And that's going to show you all of the Workflows that you've set up. And you can see there, there is my Approval Workflow. Now if I click on this, it's going to take me back into that detail screen. But something has changed.

Take a look at the 28-day run history. It's now showing that I started this on the 25th of June at 2:12pm, it's showing the duration, and it says Status Running. So it's currently Running because I haven't finished the Workflow by approving or rejecting it.

And another cool thing you can do here is if you click on the link, it's going to show a diagram that shows all of the different steps that this Workflow is taking, and if they've been successful or not. So I can see here, I have green ticks next to all of these. And if I scroll down, you can see where we're up to. So, Set respond to approval link is the last successful step. And now you can see it's waiting for an approval. And what you'll notice is that as soon as I click Approve or Reject, the rest of these steps are going to turn to a green check. So let's do that.

I'm going to jump back to Outlook, and let's approve. And I'm just going to add some comments, let's just say approved and submit that. If we now look at the Workflow, you should see them all turned green. And there we go. Now if I go back to My Flows, and click on the Workflow, if I look in the History, I can see the status is Succeeded. Let's send another document through this Workflow, but this time, we're going to reject it. So let's take this one here, Training Prices. We're going to jump up to our three dots, down to Automate, and we're going to select the Workflow.

The process is exactly the same. So I'm just gonna say, Please review once more. I'm going to set myself up as the approver and run the flow. You can see I'm getting a notification in Microsoft Teams again. And in a moment, I should also get an Outlook notification. Now, if I just jump back to Power Automate, and let's just refresh this screen, you can see there is the second flow, status is Running. Let's go to Outlook. There is the approval email and this time, I'm going to reject it.

SharePoint Online

Now, you might think that if this approval gets rejected, then the status in the Run History is going to say failed or rejected or something like that. But let's refresh the page and see what we get. But it says Succeeded. Because this only logs if the flow has run successfully. The flow has worked, nothing went wrong, we didn't get any errors, it's just the approver rejected the document. So, all very straightforward and simple. That is how you can create a Workflow and manually trigger it in SharePoint.

Video: Creating Automated Workflows

Deb: In the previous lesson, I showed you how to set up a document Approval Workflow that's manually triggered. And I briefly mentioned to you that you can have either Workflows that are triggered manually or automatically. And this is one of those subjects that I don't really want to do a huge deep dive on in this particular course. But I will very briefly show you how we can set up that same document approval process, but have it trigger automatically.

So if we jump back to our SharePoint Online Document Library, I want to set up this Automated Workflow so that every time a new document is created in the Documents Library, it triggers the Approval Workflow. So if I upload a new document, or if I create a new document, that's going to trigger the approval process, and emails are going to be sent out to approve the document. So let me show you how you can do this, we're going to jump back across to Power Automate. And if you're a member, I'm currently clicked on My Flows.

Currently, I just have the flow that we created in the last lesson. So now what I want to do is I want to create a brand new flow. So using the menu on the left-hand side, let's click on the Create menu item. And this is basically going to show you three different ways that you can create a flow. You can start from a blank, you can start from a template, which is pretty much what we did last time, or you can start from a connector.

Now what I'm going to do is I'm going to start from a blank, which means I'm going to build my flow from scratch. Now we have quite a few different options up here. But the one that we want is this first one, Automated Cloud Flow. And this is a flow that is triggered by a designated event. And our example, the designated event, is going to be that a new file has been added to the Document Library. So let's click on Automated Cloud Flow.

The first thing I need to do here is give my flow a name. Now you can come up with something a little bit more explanatory than this, I'm just gonna say Document Approval. And the first thing I need to do is choose my flows trigger. So the trigger is when I add a new file into the SharePoint Document Library. So the first thing I'm going to do here is I'm going to search through all of the triggers, because there are so many of them, for just the ones that are related to SharePoint. And I can then have a browse through and see which one matches what I want to do.

So the very first one in this list says, "When a file is created in a folder". And that is exactly what I want to do. So let's select this as our trigger. Click the Create button at the bottom, and I can now establish the properties for this particular trigger. So it's asking me for the site address. Now if I click the drop down, that's going to show me all of my current SharePoint sites. And it's this one here that we're working in SharePoint Online Training. I then need to choose folders. So which folder essentially is going to trigger this flow?

Well, it's going to be when I add or create a new item in my Documents folder. And this actually shows up as Shared Documents in this little list. So this is my trigger. So when I do add a new document, the next step is what do I want this flow to do? Well, let's click on New Step. Well the action to this trigger is going to be that I want it to start the approval process for this document.

And because approvals are built into Microsoft 365, I can just search for approvals. And it's going to show me all of the actions related to approvals. And there are just a few of them down here.

So the first one here, Start and wait for an approval. Now that's exactly what I want it to do. I want it to start off the approval process, and then I want it to wait until the approver either approves the document, or rejects the document. So let's select Start and wait for an approval as our action to the trigger. Now I have some properties that I can complete for this. So my approval type, well, I want everybody that this gets sent out to to have to approve it before that document is essentially properly approved. So let's select the first option from the list. I can now create a title for the approval.

Now you can give it whatever title you like, I'm just gonna say Doc for Approval to keep things simple. And then you can add in the email addresses of the people who need to approve this document. So again, because there's just me here, I'm going to assign this to myself. The other fields that we have here aren't mandatory, so I'm going to leave all of these blank and just click on Save.

So now I have my trigger in green, and then my action. And I could carry on going adding new steps to create more and more complex Workflows. And as I said, we're not going to dive too much into this because we then tend to go off down the tangent into Power Automate. But this is quite a nice simple example. I'm going to click on Save at the bottom to save that Workflow. And now, we're going to test it out. And what you'll notice is that in the top right-hand corner of the screen, I actually have a little Test button just here.

So once you've created your Workflow, let's click on Test. And you can choose if you want to test this manually by adding a file into the SharePoint folder, or automatically. Now I'm going to test this manually. Then right to the bottom, I'm going to say Test. And you can see that I now have a message at the top that says, "To see it work now, add a file to the SharePoint folder you selected". So I'm going to jump back to my Documents Library. And I'm going to create a little Word document and just put it in here.

So let's jump up to the New button and down to Word document. And we'll just put some junk text in here, "Hello world". I'm going to wait until the document says that it's saved, close it down. And I don't know if you saw in the bottom right-hand corner, I got a notification from Teams letting me know that that approval has been kicked off. And what you'll also see now is that I have another notification from Outlook, telling me that I've got a document to approve.

So if I jump across to Outlook and take a look in my email, I can see yes, there we go. That is that document and I can choose to approve or reject. So I'm going to approve this. Let's add some comments and submit that back. And that document has now been approved. Now when gonna jump back into Power Automate, you can see here, I now have a green tick next to the trigger, and also the approval. So it's telling me that those have been run successfully. If I click back on My Flows, there is my document approval flow.

If I click this again, you can see that in the Run History, it's telling me that it succeeded. And I can take a look at the different steps by clicking on the dates. And it's going to take me back to this screen. And this flow currently, because of the way I've set it up, is going to run every time I add a new document into the Document Library.

Now just to finish off by showing you another short example of an Automated Workflow. Well, this time, we're going to turn our attention to social media. So maybe you are a content creator, maybe you upload videos to YouTube all the time. And something that most content creators do is when they upload a brand new video to their YouTube channel, they'll normally tweet about it as well and say, "Hey, guys, come and check out my latest video".

So in Power Automate, you could set up a Workflow that says whenever you upload a new video to your YouTube channel, post a tweet that contains a link to the video. And you will do this in exactly the same way that we set up the document approval. We're going to jump back into the Create button in the left-hand menu and say Automated Cloud Flow. Now the flow name, this time, I'm going to call this one Post a Tweet, and we need to choose the flows trigger. Well the trigger for the tweet is going to be when I upload a video to my YouTube channel.

So I'm going to type in YouTube to take a look at all of the YouTube related triggers. And I just have three of them. And the one I want is here, When I upload a video. Let's select it and click on Create. Now it's telling me that I don't need to add any additional information for this step. So okay, great. Let's click on New Step. So the trigger is the upload of a video to my channel. What is the action?

When I upload a video, I want Power Automate to tweet for me. So I'm going to type in Twitter and pull up all of the Twitter Related Actions. The one I want is here, Post a Tweet. And then I can choose the text that I want to be posted. So I might say, "Check out my new video", and the media to be posted? Well, I want to post the video web link and click on Save. And of course, you can test this out by uploading a video to your channel and then checking your Twitter to make sure that it's posted. And if I click in My Flows, there is that flow that I can use over and over again.

So, those are a couple of simple examples of Automated Workflows.

Section 7 – SharePoint Webpages Explained

Video: SharePoint Webpages Explained

Deb: Before we start to discuss Web Pages and start to build them, let's do some work on what SharePoint Web Pages are all about. Now, as we know, a SharePoint site contains many things, Lists, Libraries, Content, Permissions, and all sorts of other information.

Now, with all that Content there, we need a way to display this Content to the users. And this is where pages come into play much like any other website. We might have one page and at the top, maybe it says, Welcome to the site with a bunch of links to Lists and Libraries. We might also have multiple other pages that contain Content about a specific topic.

So for example, Project Team A. So I can create a Web Page essentially, specifically for Project Team A, and then I can add relevant Content to that page. So how do we add relevant Lists, Libraries, news links and other types of Content to a Web Page? Well, we use Web Parts. And the best way to think about Web Parts is that they are kind of like a little container. And you can add as many Web Parts as required, and then populate that Web Part with the information that's relevant to the specific page.

So in the first Web Part, I might choose to house a List of Tasks that are relevant to Project Team A. In the second Web Part that I add, I might choose to display a List of documents from the Document Library that are relevant to Project Team A. I may choose to display some relevant news links in another Web Part, and maybe some YouTube videos, some text or some links in other parts of the page. And this is what we're going to look at throughout this section.

I'm going to show you how to create Web Pages and how to use App Parts and Web Parts to add Content to them.

Video: Working with the Wiki

Deb: So far in this course, we've seen how to create a Team Site. We've also seen how we can create some Lists, Calendars, Contacts, Task Lists, and Libraries. And we've seen how we can upload documents to those Libraries.

So essentially, what we now have is a site that has quite a bit of Content. But this Content is all kind of floating around in a rather disjointed way. And whilst all of the Content is there, I could send out a link to this site to a whole bunch of people, it's not currently particularly easy to navigate around to find the Content that you need.

So what we really need to do here is make the data more accessible. Because if we aren't presenting the data right, then users are going to have a really hard time finding what they need to find, so much so, that they might give up on SharePoint altogether. So let's start out by talking about Wiki pages.

Now currently, I'm on the SharePoint site Home page. And this site already comes with a Wiki Page Library. If you remember, when we created this site, we created a Team Site. And the Team Site is based on a template. And that template comes with an inbuilt Wiki Page Library. Now in a moment, I'm going to show you how you can create your own Wiki Page Library. And that is basically what you're looking at on this Home page.

This Home page has lots of different sections. So we have News, we have Activity, we have Quick Links over on the right-hand side. And also we have our Document Library. So I'm basically pulling different pieces of Content into one page and displaying them to the user. For example, the Document Library that you can see on this Home page is just the standalone Document Library that we created in Documents just here.

So whilst this is kind of separate on its own, what we've done is we've essentially added a Web Part and pulled through the Document Library to this Home page. So Wiki Pages are a great way of pulling together all of your Content and displaying it in an accessible way. Now, of course, you can also add your own Wiki Page Libraries if you want to. So let's first take a look at where you go if you want to do that.

On the Home page using the Top Navigation menu, we're going to click the New drop down. And underneath there, we're going to go all the way down to Ap. And remember this is the area where you can find your Libraries and your Lists. And if we scroll through these blue tiles, there is the Wiki Page Library. So if you want to add your own, you can simply click to add. Now I'm not going to add a new one, because we already have one built into our Team Site template.

So let's go back to the Home page. And if you're wondering where you can find this Home page, again, if we go across to the Quick Launch Menu, we have a link to all of the pages that we create in our site. So let's click on Pages. And you can see that currently I have two pages in this particular site. I have the Home page, and then I have a page for a News item that I created. And if we click on Home, as you would expect, that's going to jump us back to that main Home page.

So let's jump back into Pages just for one second, because what I want to do here is I want to create a page to pull all of my Libraries and Content into one single location. So I think what I'm going to do is I'm going to create a Site Page that contains relevant Content for the Marketing Team. And to create a new Site Page, it is fairly simple. If we jump up to the Navigation menu that's running across the top and click that New button, we can now add in our new page name.

So I'm going to call this Marketing Team. I'm not going to put any spaces in there, and click on Create. And now I'm basically within that brand new page. You can see if you take a look at the top, I have a number of different ribbons now. And many of these are related to things like Formatting text, and also inserting App Parts, Web Parts, Pictures, Links, things like that.

So I'm basically designing a Web Page from here and adding things that are gonna allow me to pull relevant Content into the page. And you can see that my cursor is just sitting there in this big empty field ready for me to start adding in some Content. So I could add something like; "Hello world", I can apply a little bit of formatting to this. Let's make it Bold, let's make it a little bit bigger, and let's change the color to red.

Now that's all I'm going to add at the moment. You'll see right in the top I have a Save button to save my page. Let's click, and there we go. That page is now saved. So if I now use my Quick Launch Menu to jump back to Pages, you can see that I've now created a brand new page called Marketing Team. Let's click on the link to jump back to the page. What if I now want to add some Content to this page. Because, "Hello world" isn't really telling me too much.

Well, this is where I can then go in and start editing this Web Page. And you'll notice in the top right-hand corner, there is an Edit link. If I click it, it's going to take me back into Editing mode and I can start adding whatever Content I need to. Now before we go any further, I'm going to stop here. And I want you to create yourself a brand new page. And then in the next lesson, I'm going to show you how you can start to add Content to your page.

Video: Adding Content to a Web Page

Deb: In the last lesson, I showed you how you can create a new page in your SharePoint site. And we ended the lesson by jumping into our page, and I'm currently in Edit Mode. Now the first thing I'm going to do here is I'm just going to remove the "Hello world" title that we put in in the last lesson. So let's just delete that out. So what you'll notice is when you do create a page, you're going to get this big blank rectangle where you can place your Content.

So as you've seen, we can add text in there. But we can also add lots of different other things as well. Now currently, the layout of my page is kind of boring. If I was just to type in Content, it's just going to be listed in a very linear, vertical fashion running down the page. So let's make this a little bit more dynamic and apply a different layout.

Now, what you'll notice is that we also have some ribbons on this page. And if we click on the Format Text ribbon, all the way over towards the end, there is a Layout group that contains one button; Text Layout. Now if we click the drop down just here, this allows us to choose different types of layouts for our Web Page. So currently, I have the One column layout applied, which is the default, but I can choose a completely different layout to display my Content in a different way. So I'm going to choose this one just here, Two columns with Header and Footer.

Now when I click this, immediately, you'll notice the layout changes. I now have a space for a Header, a space for a Footer, and then some Content in between. So now let's add in some Content. I'm going to click in the first rectangle, and let's just give this page a title. So this is going to be all of the stuff that's relevant to the Marketing Team. So let's call this Marketing Team. I'm going to apply some formatting using my Format Text ribbon. So let's jump up to here, I'm going to make this font quite a bit bigger, I'm going to make it Bold. And let's also change the color to this dark purple.

So when someone from the Marketing Team lands on this page, they are in no doubt that they are in the correct place. Maybe I also want to apply some Paragraph formatting. So I think I'm going to center this on the page. There we go. I think that looks pretty good. So now let's add some other Content in these other areas that are relevant to the Marketing Team. So I might want to start out in the rectangle below simply by adding in some Contacts for the Marketing Team.

So I'm gonna say Marketing Team leader, and that is Hannah Jones. We'll add in her email address. So hjones@globalteach.com. And maybe her extension is 8987. Let's hit Enter. And let's add in Marketing Manager, and that is Ross Smith. And we'll give him an email address as well. And he is extension 3409. I'm gonna do a little bit of formatting here. Let's make the headings slightly bigger, not too much, let's say 11 fonts. And the same for this one.

And also, I think we're going to make these Bold as well so that they really stand out. And we could carry on going adding more Content. For the time being, I'm going to leave it there, but I must remember to save my page. So in the top right-hand corner, we have a little Save button. Let's click on Save. There we go. I can see this is version 0.4. It's been checked in, it's viewable by authorized users, and there I have my Content. So now I'm no longer in Edit Mode.

SharePoint Online

If I want to go back in and make changes to this page, I need to make sure that I'm clicking on that Edit button in the top right-hand corner. So let's stop just there. I want you to try this out. Add some Content to your page, format it, and in the next lesson, we're going to move on to how we can add other pieces of Content using Web Parts.

Video: App Parts

Deb: So far, we've added some basic information to our page. We have a title, and we have a little bit of Content that we've just typed underneath. What I want to do next is display some other relevant information on this page. And this leads us into talking about App Parts.

So let me first edit this page by clicking the link in the top right-hand corner, I'm going to jump across to the Insert tab on the ribbon, and to the Parts group. And you can see there we have App Part and also Web Part. Now what's the difference between the two you might be thinking. Well, honestly, not a great deal.

Now up until SharePoint 2013, we only had access to Web Parts. And if you are asking for my opinion, I kind of do think it is a little bit unnecessary to have both of them. Because the information basically repeats. You'll see in a moment when we jump into App Parts, what this allows you to do is insert Content that's in a List or a Library. Whereas Web Parts allow you to insert Lists, Libraries, and other types of Content. So really, you are kind of doubling up there. But it's probably not for me to question the wise gurus at Microsoft. So, I'm going to use App Parts first of all on this page.

Now what I want to do is I want to pull in some Content that is relevant to the Marketing Team. And the Content that I'd like to pull in are all of the Marketing Team Contacts. Now if I just save this page, just to show you exactly what I mean. If I go to the Quick Launch Menu on the left-hand side and go down to my GlobalTeach Contacts, if you remember, we have a Contacts List just here. And it might be that the Marketing Team only deal with Contacts who are at Kings Landing PLC.

And so when I pull this List through to my Web Page, I only wanted to show the Contacts that work at Kings Landing. So you can probably think about how you might do this, as we have done it before. What we could do is create a new view that filters just for the Contacts at Kings Landing PLC, and then pull that through to the Web Page. And that is pretty much what we've already done previously. If I click the All Contacts button, take a look here. I have a view that says Kings Landing PLC Contacts. So I've already created that, and I can now use that List on my Web Page.

So let's jump back to Pages, and open up Marketing Team, and click our Edit button. I'm going to click my mouse in the blank rectangle on the right-hand side, and we're going to insert an App Part. Now, as I said, App Parts will show you any Lists or Libraries that you have in your SharePoint site. So you can see here we have Documents, I then have the Employee List form templates, and then all of my Lists that I've set up. I also have access to the Office Locations List, the User Guides Library that I set up, my Site Pages, Project Questions, pretty much everything that I've added in this course.

Now I'm looking to add my Contacts. So let's select GlobalTeach Contacts, and click on Add. And immediately, you can see what happens it pulls through the entire List into my Web Page. Now, if you remember, I don't want everybody in this List, I just want the Contacts that are at

Kings Landing PLC. So I'm going to need to modify the way that I'm viewing this List on this page. And if you take a look at the top right-hand corner, we have a little tiny drop down arrow. And from here, we can edit the Web Part. And this is pretty good because it opens up this little pane on the right-hand side, which allows you to make different changes to the way that this Web Part is displaying.

So currently underneath this first heading, List Views, it says selected view current view. Now if you have got alternative views already set up in your Library, when you click the drop down, you'll see them listed here. So now I can very easily select the Kings Landing PLC Contacts view, I'm going to say Ok to this little message, and then when I click Apply, it's going to apply that view to my List. Let's jump in and edit this Web Part again.

Now something else you might want to do is underneath where it has Toolbar type, you can see that I'm currently showing the Full Toolbar, which is basically showing me the title and then this New Item button, Edit this List. It might be that you don't want this information at the top on your Web Page. So what I could do here is I could choose a Summary Toolbar, or I could choose have No Toolbar at all.

So when I select that and click Apply, you'll see now I just have the title and it gets rid of those buttons underneath. We also have other options here for changing the appearance. We can specify the exact height and the exact width of this box. I can make changes to the layout. And then I have some advanced options at the bottom as well. So you can really customize how this App Part looks and functions on your Web Page.

And another thing you'll notice is that as I am clicked in this Web Part, I now have some additional ribbons at the top. So I have a Web Part ribbon, where I can do things like take a look at the properties, even delete the Web Part if I wanted to. And then because this is a List, I have all of my List options on my List ribbon, and then some additional options related to the items in that List. Once I'm happy, I can click on the Save button in the top right-hand corner, and that is how you add an App Part to your Web Page.

Video: Web Parts

Deb: So, our site is really starting to come together now. We've added a title, we've added some Contact details, and we've also added an App Part just to display those Contacts for Kings Landing PLC. So now let's talk about Web Parts. And as I mentioned in the previous lesson, there is a lot of overlap between App Parts and Web Parts.

And the way that you need to look at this is that App Parts are new, and Web Parts are old. And technically, Web Parts contain all of the information that you'll find in App Parts and some additional things. So as I said, I'm not really sure why we need both, but this is not for me to question. So I'm still in Edit Mode on this page, let's take a look at how we can add a Web Part in. So I'm going to click in the rectangle at the bottom, up to the Insert button, and this time, let's choose Web Part.

Now there is a bit of a different layout when it comes to Web Parts. If I quickly jump back to App Part, if you take a look at what this one looks like, remember App Part is just given us access to add any Lists or Libraries that we have within SharePoint. Whereas if we go to Web Part, we have all of these different categories, and then we have our parts. So in the Apps category, this is where I can find things like my Document Libraries, the Employee Lists, all of the Lists I've created. But I have additional pieces of Content as well.

So if you want to add a Blog, you could very well do that by choosing one of these Web Parts. Maybe you want to add some kind of form to your Web Page. What about an Image Viewer, so you can place a nice image on your website. Or, maybe even a Page Viewer, which is going to allow you to display another Web Page on the SharePoint page. And then we have a Social Collaboration category, which doesn't have a great deal in it at the moment. But this will show you some important information about the particular site. And we'll add that in a moment just so you can see what it looks like.

But for the time being, we're going to add another one of our Lists. So for this, I'm going to jump back to Apps, and I want to add a Document Library this time and I'm going to add the User Guides Library, let's click on Add. That's going to load up into my page. And if I scroll down, I can see there are my User Guides. Now once again, if I click the drop down arrow and edit the Web Part, I can also change the View.

So I don't know if you remember, we also created another View for this List, which shows all the Team 1 Responsibilities. And we're going to pretend that Team 1 is related to Marketing. So we're going to apply this filter to this List, so that we can only see those related documents. So this is all just about keeping it relevant to the particular team on the page that you're on. And of course, depending on what you want to display, you might do this slightly different. You might apply different filters or have different information on your page, but all of the techniques will be fairly similar.

And once again, if you want to get rid of this Menu bar running across the top here, New, Upload, Sync, so on and so forth, your users don't really need to see that. Let's edit that Web Part

once again, and change the Full Toolbar to No Toolbar, Apply, and Okay. And there we go. So fairly straightforward, and pretty much the same as adding in an App Part. Let's do one more thing, before we leave, let's insert something that isn't a List or a Library.

Now I'm actually just going to insert it underneath where we have these names. So if we go back to Insert, and Web Part, I'm actually going to add in some information about the site. So let's go to Social Collaboration. We only have one Web Part that we can add, and that is Site Users. And you can see on the right-hand side it says; "Use the Site Users Web Part to see a List of the Site Users and their online status".

So, let's click on Add and see what we get. And there we go. So we get a little List of all of the Site Users and the groups. So, we can jump in and we can see who belongs to each of those groups. Once again, I can edit this Web Part and I can change my Toolbar type to No Toolbar, click on Apply, and click on Ok. Let's click the Save button in the top right-hand corner just to save all of that work, and there we go. We're really now starting to pull together all of the Content that's relevant to the Marketing Team.

Video: Adding Other Content

Deb: So, we've already seen how we can use Web Parts and App Parts to add different types of Content to our pages. And so far, we've pretty much focused on adding things that already exist in SharePoint, so things like Lists and Libraries. And that's all well and good. But what if we want to really make our pages come alive?

Maybe we want to add a video from YouTube. Or maybe we want to link through to a particular Twitter feed. Maybe we want to add interactive buttons or Lists of links, all of these things can also be added to your pages. So, let me show you how to do this.

So I'm currently clicked on the Home page. And whilst it's looking pretty good, we have some News items, Quick Links, I'm showing my Activity and my Documents. Let's edit this page, tidy up a little bit, and add some different types of Content. So the first thing I'm going to do here is I'm going to click the Edit link in the top right-hand corner. So this takes my page into Edit Mode. And I can now go in and edit each of these Web Parts. And you'll notice that if I click on News for example, I get this little pop out menu at the side, and the first option I have is Edit Web Parts.

Now I'm going to do a little bit of rearranging here. What I want is this Document Library, I want this underneath my Newsfeed. It's looking a little bit squashed up where it is right now. Now, once you're in Edit Mode, you'll see that you get the double-headed cross. If I click, I can simply drag this Web Part and place it where I want it to be. Now what I'm going to do is I'm going to grab my Activity, and I'm going to move that over to the right-hand side, underneath my Quick Links.

Now with Activity, this is showing me quite a few of the last things that I accessed. So I'm going to change this so it only shows the last three. So what I can do here is click on the Web Part, I can choose Edit Web Part from that little menu, and then I get a pane pop on the right-hand side where I can define how many items I'm showing in the List. So I'm going to take that from 9 down to 3 and close the window. And if I now look at this, I can see that that looks a lot neater.

So now, maybe I want to add the Microsoft Twitter feed to my Home page so that all of my Team Members can keep on top of all of the latest SharePoint and general Microsoft updates. What I can do is if I scroll down, so if I hover my mouse over the bottom border here, you can see that I get a little blue plus where I can add a new Web Part in column one. So let's click this. And what we get is a little window that opens up and it shows us all of the different types of Content that we can add into our Web Pages.

And you can see that there is so much stuff in here. If I want to add text, I can do that. Maybe a List of information. I can add YouTube videos, Twitter feeds, interactive buttons to take people off to another link. I can add images, I can add something called a hero template, which basically allows me to prominently display five pieces of Content, I can add in Spaces, Quick Links, Image Galleries. And as we scroll down even further, we can choose our Documents, Lists and Libraries, Yammer Conversations, Twitter, even things like News, People, and Events.

So, I can display a Countdown timer, or some information about specific event. Or maybe I want to show an organization chart. And as we scroll down even further, we have things like Data Analysis tools, Regional Information, so maybe I want to put the Weather on the website, and then some advanced options, which are going to link us out to other popular applications. So I would definitely recommend you having a little look through here and an experiment adding some of these as Web Parts.

And what we're going to do is we're going to add a Twitter feed, and this is very straightforward. Let's click on Twitter. And now in the right-hand pane, I can define my Twitter settings. So by default, it's showing me the Microsoft Twitter feed. And of course, if you want this to display something completely different, you can just change the user name up here. I can define if I want to show the Twitter header, if I want to display dividers, and if I want a light or dark color theme. And then finally at the bottom, I can determine how many tweets I want to show on my page. So currently, I'm showing 3, I'm just going to change that to 1. We're just going to see the last tweet.

Once I'm happy, click Close, and there we go. The Twitter feed is now added. Let's add something else let's add a YouTube video. Now if you want to add videos from YouTube, you need to make sure that you grab the link first of all. So I'm going to open up a new browser and let's just go to YouTube. And I'm just going to go to the Microsoft channel. And let's just grab one of these videos, I'm not really too concerned which one I'm going to use at the moment. But what I want is the link. So up in the URL bar, Ctrl + C to copy.

Now if I go back to SharePoint, let's go down and add another Web Part. I'm going to add a link to YouTube, and now I can just paste in the YouTube link, Ctrl + V. If that's a valid link, it's gonna load up after a few seconds. And you can define where you want it to start, if you want to show the player controls, and if you have Privacy Enhanced Mode turned on. Now I'm gonna leave all of these settings as default and just close this down. So really nice and simple.

Now aside from adding Web Parts in here, you can also add new sections. So if we move our mouse over to the left-hand side, we have another blue plus, which says Add a new section. So I can click this. And I can choose if I want one column, two column, three column layout, so on and so forth. So let's say two columns. And now I can go through and I can add my Web Parts. So maybe in here, I want to display an Image. And what I'm going to do here is just grab one of these stock images. Let's go to Technology, and I'm going to select this light bulb image just here, and click on Insert.

So adding really interactive, nice looking Content is so simple using Web Parts. Once you're done, all you need to remember to do is click the Republish button in the top right-hand corner. That's going to set your changes to live, and everybody in your team can now see the changes that you've made.

Section 8 – Editing the Navigation Menu

Video: Editing the Navigation Menu

Deb: We now have so much content on this Site. But really, it's all a bit pointless if it's hard for users to find. So what we really want to do here is make navigating and finding the content super easy. And we can do this by customizing the SharePoint Navigation. And when it comes to Navigation, there are a few different places we can go to insert Links. We know that we have our Quick Launch Menu on the left-hand side, and I've got quite a few items in here now.

But what we also have on the Home page is this little Quick Links section. So what I might do here is add any Links that are universally useful to everybody accessing this team Site into here. So maybe your team find that they go to Google every single day, you might want to add a Quick Link to that. Maybe you want to add a Quick Link to your local news website so they can keep on top of current events. Or maybe you want to provide Links to individual team pages.

So we saw how we created a page for the Marketing Team, you might want to have listed out in Quick Links all of the different team pages, so that users can easily access content that's relevant to them and their team from that Home page. So there's the Quick Links section as well. And what you can also do is you can also add a Top Navigation menu if you want to.

And it's not particularly obvious when you're using the Modern Experience, but I'm going to show you how you can add Links across the top of the page as well in the Classic Experience in a moment. Let's first of all, take a look at editing the Quick Launch Menu on the left-hand side.

Now you've seen me do this a couple of times, it's fairly straightforward. If we scroll down to the bottom, there is an Edit Link. Let's click this Edit Link. It takes us into Edit mode, and we can then start to do things with these menu items. Every single menu item has three dots next to it, which is going to show a Contextual Menu. So if I decide I want to change the name of one of these pages, if I click the Edit button, it's going to allow me to change the display name in here. I could even change the address that that Link is going to when clicked.

So you have a lot of flexibility when it comes to modifying these Links in that Quick Launch Menu. Something else you can do in here is you can reorder those menu items by moving them down or moving them up. Now I don't really want to move home, but if I scroll down towards the bottom, let's say I want to move this User Guides menu item by click the three dots I can say move up, move up again, and I can carry on going to reorder this list. I can even make certain menu items Sub Links as well to add a bit of structure into this Navigation.

So for example, if I go down, let's say that pages is the Header, if I want to make GlobalTeach training tasks a Sub Link, click the three dots, Make Sub Link, and it indents it very slightly so you can see that there is a slight difference between these and the page above. And of course, if you want to remove any of these items, again, click the three dots and you have a Remove button in the Contextual Menu. So everything from here can be completely customized.

Another thing you'll notice is as I hover my mouse over this Quick Launch Menu, I get this little blue plus. And this allows me to add a Link or a Label to the Navigation. So if I click the plus just here, I could add in my own Link. So just as an example, let's just do Google. That's nice and easy. The display name is just going to be Google, click on Ok, and that adds it to the menu. So let's click on Save and just test to make sure that that new Link is working.

So if I now click on Google, it should open a Google browser, which it does. And what you'll also notice here is that if you do make items in this list Sub Links, you then get this little arrow to collapse or expand out that group of Links. Now if you want to add a Link to this menu to another page within your SharePoint Site, you can do it in exactly the same way. You just need to make sure that you grab the Link that you need first of all, navigate to the page, and then copy the URL, and paste that in as the Link.

Now I've just jumped across to the Training Tasks list just here. And this is one of those pages that uses the Classic view to display at least on my SharePoint. So this is a good opportunity for me to show you how you can add Links to the Top Navigation menu. And what you'll notice here is just above the title where we have GlobalTeach Training Tasks, we have an Edit Links button. So let's click this. And we can basically add Links running across the top of the screen.

So just to keep things consistent, let's click on Link. Text to display, let's do Google one more time, and then we need the address. So there it is <http://www.google.com>. And click on Ok. And you can see there is my little Link at the top. And let's just add another one to this Top Navigation menu, we're going to have a Link out to the Microsoft website. And I'm going to paste that URL in and click on Ok. Let's click on Save and take a look at those. And there they are.

Now we'll say that the items that you add to the Top Navigation menu should really be things that are kind of universal to everybody. So Sites that everybody in the team is likely to access. Whereas the Quick Launch Navigation menu on the left-hand side should be a bit more related to the specific team. So I could carry on going adding Links across the top. But if we jump back to the Home page, which is going to take us back into the Modern Experience, you can see that I do still have those Links running across the top, even though we don't have any way of adding them from this particular view.

What we have instead in the Modern Experience is this little Quick Links pane on the Home page. And this, of course, is all entirely editable, as is every little web part that we have on this Home page. And you'll notice on the right-hand side, we have a big old Edit button. If we click it, that's going to allow us to edit every single web part that we have on this Home page. And that's all these little blocks are, you'll see when I click on the News web part, I get a little menu that allows me to edit it, I can move it, I can duplicate it, and I can delete that web part as well.

Let's just focus on the Quick Links pane over on the right-hand side first of all. You can see that I have some provisional Links in here, which were added in by SharePoint for me. So I have a Link to the Home page, I have a Link to help me learn about a Team Site or what a Team Site is, and then I have another helpful Link, that's going to tell me how I can add a page. Now it might be that I don't necessarily want these particular Links. So what I'm going to do is I'm going to

edit the web part. Let's scroll up, this is the one that we're looking at, and now I get my Editing pane on the right-hand side.

So currently, I'm displaying all of my Links as a List. But I do have a few other layout options in here as well. So I can choose Compact, Filmstrip, Grid, Button, List, and Tiles. So which one you choose is really up to you. You can also choose the icon size. So currently I have mine set to Small, but I could go for Medium, Large, Extra-large, Fill the space, so on and so forth.

Now, I think I'm going to switch this back to the List layout, and I'm going to add some Quick Links. So let's click the plus to add Links. And this is where I can choose a whole host of different things to add as a Link. So I can add any Links to pages that I have in SharePoint, I can add Links to Lists and Libraries that I've set up.

I can even add Links to Stock Images, Files I have saved in OneDrive, I can access everything that I have in my SharePoint Site from here, I can upload a File, or I can add directly from a Link. So, pretty much every type of item that you might want to add as a Link you can add from here.

Now I'm gonna start out again just by keeping things consistent and adding a Link to Google. So I'm gonna say http, and click on Insert. And there is my new Link. Well, you'll also notice over in the right-hand pane, I am now editing the Link and I have various different options that I can choose. So I have my Link at the top, I can change that. I have the title so if I wanted to say something different, I can modify that. I can choose if I want some kind of thumbnail. So I have a Standard Thumbnail just here.

But if I have a specific image that I'd like to use, I can select Custom Image and change it to something else. I can add Alternate Text and also, a Description. Let's add another Link. And this time, I'm going to add a Link to that Marketing Team page that we created. Now because this is something that I accessed recently, I can see it listed here in my Recent List.

If it wasn't listed there for some reason, I could go to Site, double-click on Site pages, and there is my page. Let's select it, and click on Open. And now I have a direct Link to the Marketing Team.

Let's add one more. This time, I'm going to go back to Site, and to User Guides. And I'm going to add a direct Link to the House style and Branding Guides and click on Open. Now that Link is quite long. So I'm just going to change this just to Branding Guide. Now I'm going to leave a Link to the Home page so it's easy for people to get back there. But I don't really need this, Learn about a Team Site and Learn how to add a page. So what I can do is click and remove. It's as simple as that.

Once you're happy with the modifications that you've made, you need to republish your page. And you'll see there's a big Republish button at the top. So let's click it, and it's now updated. And we can see all of those Links just there. And once again, if I want to change the order of these, I can just move them.

SharePoint Online

So maybe I want Home at the top, so let's drag that up there. I want Google second. Then I want Marketing Team followed by Branding Guide and Republish. So that is how you can edit the Quick Launch Menu, the Quick Links menu, and also add items to the Top Navigation menu.

Video: Creating Links

Deb: Something else you can do in SharePoint is add a list of Links using the Links list template. So for example, if we jump across to our Marketing Team page, and I'm going to use the Link that I've created in the Quick Links menu just to jump across to there very quickly, what I might want to do here is add on a list of Links that are relevant to the Marketing Team. And because it is a list, we do have a template available within SharePoint to do this. So I need to go in and I need to add an app.

Now throughout this course when we've been adding apps, we've been working on pages that are displayed using the Modern Experience. But now, when I'm in my Marketing Team page, I'm actually using the Classic Experience. So the way that we add an app is slightly different. We're going to go up to the cogwheel in the top right-hand corner and click and then we have an Add an App Link just there. Let's click it, and it's going to take us into a page that should look reasonably familiar to you. And if we scroll through the list of Libraries and Lists, we should come across one called Links.

There it is, let's click it and open it up. So now I need to give my list of Links a name. So I'm just going to call this Marketing Links and click on the Create button. So that list gets created in SharePoint. And you can see that it's automatically jumped me to the Site Contents area. And if I scroll through this list, there is my new list, Marketing Links. Let's click it and start to add some Links in. So up to the New button, I'm going to add a new item to this list. And now I can go through and add in my URL.

So I'm just going to add in some that are related to design. So maybe the Marketing Team are putting together some kind of publicity material, and they need some high quality images. So I'm going to add a Link for them to pexels.com and click on Save. I'm going to add another Link. Remember, you can copy and paste these, you don't have to type them all out manually. I'm going to add another Link to the Noun Project, which is a great website to go to for free icons. So that is www.thenounproject.com and click on Save.

I'm going to go away and add in a few more Links. And I'll rejoin you in a couple of seconds. So there we go, I now have a few items added into my Marketing Links list. So now that I have this, I want to display it on my Marketing Team page. So let's jump back to the Home page, and I'm going to use the Quick Link to go straight across to the Marketing Team page. I'm going to click the Edit button in the top right-hand corner, and I'm going to add my Links just underneath where I have Site Users.

So once again, we're going to do this by using a web part. Let's jump up to the Insert menu, I'm going to choose web part, and I can see underneath Apps, Documents, there is marketing Links and click on Add. And there we go. It is as simple as that. Click on Save to save the page, and we are really starting to build a really nice Marketing Team page now.

Video: Adding Hyperlinks

Deb: So far, we've seen how we can add different types of Links to our pages. But we're not quite done yet. In this lesson, I want to show you how you can very quickly add hyperlinks to a page. And we're going to add some hyperlinks on the Home page. So the first thing I'm going to do here is I'm going to put the page into Edit mode by clicking the Edit button on the right-hand side. And remember, from here, we can pretty much modify everything that we have on this page.

And so far up until this point, we've simply be a modifying web parts that we currently have on the page. But what if I want to add a new web part or a new section? Well, I can do both of those things. If I want a brand new section to add content into at the top here, if I make sure I have this first Web Part selected, you'll see that I have a little plus button that allows me to add a new section. And I can then choose the type of layout that I want for that section. So maybe I want a two-column layout, it's going to add that in and I can now go in and start adding my content.

Now I'm going to undo this because I don't actually want a new section, what I do want is a new web part. So to add a new web part again, if I hover over the center, I get a little plus button that says, "Add a new web part in column one". So if I click this, I can then choose what type of web part I want to add. And I have all different kinds of things in here. Do I want to add some text in? Do I want to add a button, a call to action, maybe a Link or even a YouTube video?

Well, in this case, I want to add some text because what I want to do here is show you how you can add hyperlinks to the top of your page. So I'm going to type in the word Links. Now a little trick here to very quickly hyperlink to all of the pages that you have in your Site is to press the square bracket twice. And when I do that is going to pull up a list of all of the pages. So it's not going to show me any Libraries or Lists or anything like that, but it will show me pages.

So if I want to have a Link at the top that Links back to the Home page, I can simply then select it. And I have my hyperlink, I'm going to press Space. And I'm going to separate these Links just using the pipe symbol. Let's do another space, square bracket, square bracket, and I'm going to add in a Link to the SharePoint Online updates. And of course, all of these Links are editable, we have a little floating Formatting toolbar just above if you want to make it Bold or Italic. And if we click the three dots, we get a pane open on the right-hand side which is going to allow us to customize this even more.

So let's apply some formatting. I'm going to take the font size down to let's make that a little bit smaller. In fact, that's a bit too small. Let's go for 16. And then I can click Republish, and I now have some Links running across the top. And of course, if I want to add a hyperlink to something else on the Site, I can simply navigate to that page, so let's go back to our Marketing Team page. I can grab the URL, Ctrl + C to copy, I can then edit the page and add it in as a Link. So let's add another pipe symbol in here. And I'm going to type in Marketing Team this time.

SharePoint Online

I'm going to select it and then just above using that Formatting toolbar, I can add my own hyperlink. Ctrl + V to paste it in, and click on Save and Republish the page. So before we go any further, open up your Home page and practice adding in some Links

Section 9 – SharePoint Permissions

Video: SharePoint Permissions

Deb: The ability to secure our data is very important. And therefore, Permissions in SharePoint are very important. And we have briefly taken a look at the different Permission Groups that you can assign to other people. But let's dive in and take a closer look.

So I'm currently on the homepage, and if I want to take a look at my Site Permissions from here, all I need to do is click on the little cog wheel in the top right hand corner. From the drop down list, I'm going to select Site Permissions. And from here, I can then see the three different Groups; we have Site Owners, Site Members, and Site Visitors. Now what I'm going to do here is right at the bottom, we have an Advanced Permission Setting.

Now I'm going to dive straight into there. Because this allows me to see each of my three Groups in a bit more detail. And you can see in the Permission levels column, exactly what each Group can do. So for Members, they can edit. Owners have full control, and Visitors have read-only access. So what if we want to add a particular user to one of these Groups? Well, it's very straightforward, all we need to do is open the Group.

So I'm going to open the Members Group. And then from these little options that we have running across the top, if we click the New drop down, we can Add Users to the Group. So all I need to do now is type in the email address of the person I want to add, and I'm just going to add myself. And I can include a little message if I want to as well. Then click on Share. And it's that simple. Now what about if we want to do the reverse? What if we want to remove somebody from a Group?

Well, all we need to do is select that person. So I'm going to select myself, up to the Actions drop down, and right at the bottom here, we have a Remove Users from Group option. Let's select it and say, okay, yes, we do want to remove this person, and they're gone. Now, one thing that's extremely important to know, if you are the Owner of a Site, so I'm the Owner of this particular SharePoint Site, don't remove yourself from the Owner's Group. Otherwise, you're going to find yourself running into all kinds of different problems.

Now, another scenario that you might have is, maybe these three Groups don't particularly fit the Permission levels that you want to grant a specific group of people. Well, if that is the case, then you can set up your own Permissions Group. And we can do that from here as well. If we jump up to the Permissions ribbon. In the first Group here, we have a little button Create Group. And we can now go in and define the Group settings.

So maybe I want a specific level of Permissions for everybody who works in the marketing team. So I'm going to call this Marketing Team. The Owner, well, I'm happily going to keep that as myself, I want only the Group Members and the Group Owners to be able to view this Group. And then I can choose if I'm going to allow requests to join or leave this Group. And you can

either choose Yes or No there depending on what you need. And then right at the bottom is the good stuff. This is where we define what level of Permissions to give this Group to this SharePoint Site.

Now in here, we do have the three defaults as well. So full control, that's normally assigned to Owners of the Group. Edit, that's in general what Members will have. And then read is what normally gets assigned to Site Visitors. But then we have three additional Groups in here. We have a Design Group, and anybody who has this level of Permission, can View, Add, Update, Delete, Approve, and Customize.

We have a Contribute Group, they can View, Add, Update, and Delete List items and Documents, and then a Restricted View Group. So, this Group can only view Pages, List items, and Documents. And Documents can be viewed in the browser, but not downloaded. So you have three additional Groups here that you could assign. So I'm going to say that the Marketing Team is going to be Adding, Updating, Deleting.

They might do a little bit of customization and approvals so I'm going to set them up with a Design level access. I'm now in my new Permissions Group called Marketing Team. And currently, I'm the only Member. And of course you can add users in exactly the same way. Just type in their email addresses and it's going to send out an email invite.

So, that is it. Pretty straightforward when it comes to managing your Permissions and adding and removing users.

Video: Managing Permission Groups

Deb: So far, we've been looking at Site Permissions. And one thing to remember is that these are Site-wide Permissions, they apply to the whole Site. So when we add a user to a Group, we're giving them access to the entire Site. If we remove a user, we're taking away their access from the whole Site.

But, we can also get a little bit more specific when it comes to Permissions. For example, different Permissions for specific Libraries or Lists. So let me show you an example. I'm going to scroll down, and I'm going to go into one of the Document Libraries that we created towards the beginning of this course, I'm gonna jump into User guides.

Now the way that Permission Groups kind of work in SharePoint is that the Site-wide Permissions are essentially the parent Permissions. And then Permissions to the individual Libraries and Lists are assigned accordingly. And unless you specify they're going to inherit the Permissions from the parent. So what if I want to give a specific group of people certain Permissions to this particular Document Library only?

Well, this is where I can set specific Permissions for a Document Library. And I will say that this works exactly the same if you want to do this for a List. So all you need to do is go into the Library, jump up to the cogwheel in the top right-hand corner, and in the List of menu items, you'll see that you have Library settings. If you're in a List, this will say List settings. So now I'm in my settings for this particular Library. And in the middle, here, we have a Group called Permissions and Management.

And the second option down says Permissions for this Document Library, which pretty much sounds like we're going to find what we need in there. And here we go. Here are my four different Permission Groups. Remember, we have the three defaults; Members, Owners and Visitors. And then we have the one that I just created in the previous lesson for the Marketing Team. If you take a look at the Permissions ribbon, you can see we have a big button there that says Stop Inheriting Permissions.

So what I can essentially do here is I can break the connection between this Library and the overall Site. So let's click Stop Inheriting Permissions, I get a little warning message, it says; "You're about to create unique Permissions for this Document Library. Changes made to the parent Site Permissions will no longer affect this Document Library". Well, that is exactly what I want to do. So, let's click on Ok.

So now that I've broken that connection, it's telling me that this Library now has unique Permissions. And what I can do is if I want to adjust the Permission levels for each of these Groups for this specific Library, I can do that. So maybe I want to select the Marketing Team and change their Permission level for this Library. So back up to my ribbon, and I can click Edit User Permissions. It's telling me at the top here that this is for the Marketing Team.

Currently, they are in the Design Permission Group. But I can now come in and maybe change them to something else. So maybe I just want them to have read access instead in this Library

only. And click on Ok. And I can carry on going and modifying Permissions for any of these other Groups. Just always remember that you're only changing the Permissions for this specific Document Library. Their Permissions in other parts of the Site will remain the same as they were originally.

And if you decide at any point that you want to reestablish the link between the Document Library and the overall Site, you can delete Unique Permissions. And you can see now for Marketing Team, the Permission level has gone back to Design. Because, it's now inheriting those Permissions from the parent.

Section 10 – Site Collections

Video: Site Collections

Deb: When a Site is first created, you get a top level Site. And from that Site, you can develop Subsites. So you might have a Subsite for different departments. And each of these Subsites are based off of the Parent Site.

Now, these Sites are independent in Permissions and content. But all of these together are called a Site Collection. And this is the level directly above the Owner. So, what we're going to do in the next lesson is we're going to create a Subsite and look at how we can maintain it. And I will say that if you work at an organization that uses SharePoint, different companies can manage this in different ways.

At some companies I've worked at, the administrators create all of the Sites for the organization and manage them. Whereas at other companies, they kind of open it up and let departments create and maintain their own Subsites.

Either way, it's always good to know. So, let's get on to the next lesson and see how we can create our own Subsite.

Video: Creating a Subsite

Deb: So, let me show you how quick and easy it is to create a Subsite in SharePoint. Now, if you cast your mind all the way back to the beginning of this course, when I showed you how to set up your Practice Site, if you remember right at the beginning, I chose Team Site. And that is exactly the same template that I used to create the SharePoint Online Training Site that we've been using throughout this course. And that Team Site is a template. And included in that template is the ability to create Subsites. So let me show you how simple it is.

The first thing we need to do here is we need to go into that area in our Site where we can see absolutely everything in our SharePoint Site. Can you remember where that is? Well, if you said Site Contents, then you are absolutely correct. Let's go to our Quick Launch Menu, all the way down to Site Contents. Incidentally, if you don't have Site Contents added to your Quick Launch, you can also click on the cog in the top corner, and you have a link there also to Site Contents.

So, this takes me to where all of my content on this Site is stored. And if you notice at the top, where we have these little headings, one of the headings is Subsites. So, let's click and see what we get. Well, not a great deal at the moment, because we haven't created any Subsites. So, I'm sure you can imagine where this is going. Just above, we have a New button. Let's click the drop down, we have a few different things that we can create. But the one that we want is Subsite. And we can now define the properties for this new SharePoint Site.

So, the first thing we need to do here is give our new Subsite a name. So as the Parent Site is called SharePoint Online Training, let's call this SharePoint Online Training Subsite, type in a description if you need one. And then we need to assign a website address to this Subsite. And the cool thing about that is that it will get its own unique URL. So if you want somebody to directly access your Subsite, you can just send them the URL name.

Now, when it comes to URLs, try and make it very descriptive. And so that it relates to the title of your SharePoint Subsite. So I'm going to call this let's call it spoint-sub-01. And notice that I'm separating the words with a hyphen so I don't get any weird characters in that URL. I can then select my template language, I'm going to keep that on English. But obviously, you can change that if you need to, and then we can choose the template that we want to use for this particular Site.

And you can see here I have a few different options. I can create a Team Site (no Microsoft 365 Group), a Team Site using the Classic Experience, and that's going to use the Classic Experience on the homepage, or a Project Site. So for this one, I'm going to say Team Site Classic Experience. I can then define my Permissions for my Subsite. So I can either choose to inherit the Permissions from the Parent, or I can set up some Unique Permissions.

Now in this scenario, I am happy to keep the same Permissions as the Parent Site. So I'm going to leave that option selected. I then have a couple of different items that I can check related to Navigation. So do I want to display this Subsite on the Quick Launch of the Parent Site? And do

I want to display this Site on the top link bar of the Parent Site? And I'm going to say Yes to both of those. And then I can choose if I want to inherit the Navigation from the Parent Site.

So if you remember, with the Parent Site running across the top, I have links to Google and Microsoft. If I choose Yes, it's going to pull those through onto the Subsite. So it helps you achieve a level of consistency across all of the Sites within your Site Collection. So, I'm going to say Yes to this as well, and click on Create. And there we go, I now have my new SharePoint Online Training Subsite, and it's loaded up in the Classic Experience. And if I take a look at my Top Navigation, I can see that I have in fact inherited those Navigation links because I have links to Google, Microsoft, and the SharePoint Online Training Subsite.

Now that I have this Subsite, I can now start going through customizing it, editing it, adding Lists and Document Libraries, and other pieces of content. Now because this is loaded up in the Classic Experience, as opposed to the Modern Experience, it does look slightly different to the homepage on the main SharePoint Online Training Site. But we've seen throughout this course how we can edit Navigation links if we're using the Classic Experience, and also how we can modify this homepage by using the Edit button in the top right-hand corner.

Now one thing you'll notice is that now that I'm in the Subsite, if I want to go back to the Main Site, it's not quite as simple. I could possibly click the Back button on my browser and get it to go back. But that's not particularly elegant, it's a little bit cumbersome. So something I would probably do here, if you wanted to make it super easy is add a link back to the Main Site and add it to the Top Navigation bar. So let's do that.

I'm going to jump back to Microsoft Office Home, and I'm going to open up another SharePoint window. And let's jump back in to my SharePoint Online Training Site. And that takes us back to the home page, which probably looks a little bit more familiar to you know, what I'm going to do here is I'm going to go up and I'm going to grab this URL, Ctrl + C to copy, let's go back to the Subsite.

Now in fact, I'm not going to add it across the top, I'm going to add it in the Navigation menu on the left-hand side. So let's click the Edit links button, click on Link. Text to display, I'm gonna say SharePoint Main Site. Ctrl + V to paste the address in, click on Ok, and click on Save. And now, I can easily get back to that Parent SharePoint Online Training Site.

And of course, once you've set up a Subsite, if we now go back into Site Contents, and click on Subsites at the top here, there is our Subsite. And if you wanted to, you could do something similar and link to the Subsite either in the Top Navigation menu, maybe on the Quick Links page, on that homepage, or even add it to the Quick Launch Menu.

Video: Changing the Look and Feel

Deb: Well guys, we've made it down to the last working lesson of this course. And I just want to finish up by talking about Themes and Settings. Now all Sites out of the box look exactly the same. They all kind of have this blue coloring, we have our Top Navigation bar, the layout is very similar the font, but we do have some control over how this Site looks. So we can change things like the colors, the font, and the background colors. And all of these things working together are called the Site Theme.

Now, if you want to customize anything to do with the Look and Feel of your Site, you start out by clicking on the cog in the top right-hand corner, and then what you're seeing from this list of options, right at the bottom, we have a link to Change the look. So let's dive into here.

Now I have two different groups here; I have Theme, and I have Header. So if we click on Theme and expand that, let's see what we can do in here. Well, from here, I can change the Theme. So I can do things like change the colors that I'm using. And you can see by default, I have this kind of blue Theme going on. So maybe let's change it to something a little different. How about something like red? And you can see those links have updated. Maybe I want to go for a purple Theme. Or maybe something like teal, I think I'm gonna go for red.

What you'll also notice is as soon as I select this red Theme, I then have another link appear, which will allow me to customize further. So I can choose what I want the main color to be and then what I want the accent color to be. Now just so this really stands out, I'm going to change it to something a bit different. Let's change it to green, and click on Save. And let's jump back into Change the look. And now let's focus on changing the Header. Now when we say Header, we're talking about this area at the top here. So where I have the GlobalTeach logo and the Site title.

Now currently, the layout I'm using for the Header is standard. But I do have three other options. So as I click on these, just take a look at how each of these changes the way the Header displays. So first of all, let's go for Minimal. And there you can see exactly what that looks like that is no fast, very minimalistic. What about Compact? Slightly bigger, but more compact than standard. What about Extended? Well, that is a lot bigger, and I don't particularly like that. I think I'm going to change it back to Compact. Let's scroll down, I can now choose a background Theme.

So let's click on this second option. And can you see the Header changes to a gray background? This one I think has a very, very slight shaded background. And then this one will basically apply the main color in your Theme, which for me is red. Now I don't particularly like that I'm gonna choose the gray background. Moving down, I can choose if I want to display the Site title. Now, I do. I like to know which Site I'm on at any given point in time. But if you don't, you can just toggle that off and it's going to get rid of that Site title. And then, this is where you can upload a logo thumbnail.

So if you have a company logo saved off somewhere, just click Change underneath. And it's going to jump across to your local drives. And you can pick up the image you have saved off

from there. So those are all the options that you have for the Header and the Theme. Let's click on Save.

Now currently, in the Modern Experience, the amount that you can customize in here with regards to Look and Feel is reasonably limited. However, if you are using the Classic Experience, you'll find that you do have more options. So let me show you what I mean. Let's go to our Subsite. So I'm going to maximize Subsites and click on SharePoint Online Training, because this Subsite is in the Classic Experience. So what can we do with this Site with regards to the Look and Feel?

Well, let's go back up to the cog and go into Change the look. This takes us into something completely different. So from here, we get a whole host of different tiles all representing different Themes that we can apply to our Site. And not only does this change the colors in use in your Subsite, it also changes things like the font and the effects. So let's scroll through and let's choose something that's quite dramatic. What about this one, just here Immerse? Select. And I can customize this even further.

So if I don't particularly like this image in the background, I can change it and use my own image or I can remove it altogether. And I can even customize the colors that I'm using. So maybe I would prefer something slightly different. I can go through and choose something like that. I can then customize the Site layout and I have two options here; Seattle or Oslo. So currently we're looking at the Oslo layout. If I choose Seattle, can you see a difference between these two?

Seattle shows the menu on the left-hand side, whereas Oslo doesn't. Now I'm happy to keep mine on Oslo. And I can then customize what font I want to use. So let's change this to something like Georgia. And before we actually apply this to our Subsite, we get the option to try it out first. So let's click the Try it out link. And there we go. Check that out! Take a look at what our Site is going to look like.

Now, I think that looks pretty darn cool so I'm going to keep it by clicking Yes, keep it in the top. And there we go. I have a completely different look in SharePoint Online Training Subsite. So, just remember, if you are using the Modern Experience currently, and I'm sure this will probably change, the modifications you can make to the Look and Feel are reasonably limited. Whereas if you're using the Classic Experience, you do have a set of more dramatic templates to choose from.

Section 11 – An Example of a Communication Site

Video: An Example of a Communication Site

Deb: Hello everyone, and welcome back to the course. In this section, we're going to do something a little bit different. This is going to be more of a workshop style section, where we're going to build a Communication Site from scratch.

Now, we haven't really explored Communication Sites yet in this course, we've mainly been focused on creating Team Sites. So you might be wondering to yourself, what's the difference between a SharePoint Team Site and a Communication Site.

Well to be honest with you, there's not a huge difference between the two. You can pretty much do most things in a Communication Site you can do in a Team Site. But I guess the main difference is with a SharePoint Team Site that is really for your team. It's a place where your team members can go to collaborate on different things. And when you create a SharePoint Team Site, it also creates things like Outlook groups to really supercharge those collaboration features.

Whereas a Communication Site is a little bit more engaging in its layout. It's mobile-friendly, and it allows you to display information in a more dynamic way. But bear in mind with a Communication Site, when you create one, it doesn't create any Office 365 groups. So whether you choose a Team Site or a Communication Site is really up to you. But as we haven't looked at Communication Sites just yet, that's what we're gonna focus on in this section, and I'm going to show you how you can build something very similar to what I have on the screen from scratch.

So let's quickly look at this example before we kick off. This is a Communication Site that I've created for a travel company called Footsteps Travel. And at the top, you can see we have the Header, I have a little logo in there, and I have a horizontal menu running across the top. And this is a menu that I've customized to display the items that are relevant to my team. You'll notice that we have a Document Library. But this is also a drop down menu because I've also created a secondary Library to hold images. So this would be like an image repository if you like.

I can also see any documents for my team underneath the Document Library link. I've created a Contacts page for any useful industry Contacts. And then I've also created some Site Pages, some Web Pages. So underneath here, we have links to the individual tours that this travel company offers. And currently, I only have three in there to show you as an example. And each of these links is its own page in its own right.

So if I click on Discover India, it's going to jump me across to that specific Web Page, where I might have some information related to this particular tool. I then have a link to a Message Board where my team can post messages and receive replies. And then I have the Site Contents page that we're used to, and a little Edit link at the top.

Now this Home page that you're looking at here is essentially what we refer to as a Wiki page. It brings together lots of pieces of information using Web or App Parts. I can add sections on to

this page and then add different types of content. So you can see at the top here, I have three little panes. This is a Hero template with again, links to those different pages. So if I click on Relaxing Bali, it's going to jump me across to that particular Web Page.

As we move down, I then just have a bit of text in here. Now I've just put in some test text. But obviously you can make this relevant to your team. We then have some Latest Industry News. So if they want to keep up to date with the latest things going on in travel, we have some links out there to various different articles. I have some links to Sites they might want to access such as Google or BBC News. And I've Listed these out as Buttons.

And then on the right-hand side, we have the latest tweet from the company Twitter feed. And again, this is just one that I've grabbed off of Twitter. And I can choose how many tweets I want to display here; 1, 2, 3, so on and so forth. I'm just choosing to show the latest tweet. If I scroll down a bit more, I then have something called a Call to action Button. And this is a very nice looking Button that you can set up. And here, I've set mine up so that people can submit ideas for new destinations in 2021.

And if they click this Submit Button, it basically links through to an Outlook email where they can email me their ideas. Underneath that, I've added three YouTube videos which might be of interest to the team. We then have some Quick Links displayed as tiles and then access to the Document Library. And then in the final sections at the bottom, I've just added the Weather for our key office locations and also the different Time Zones.

And then finally, underneath that I'm displaying all of the upcoming events, all of the upcoming meetings for my team. And then finally at the bottom, we have a Comments area. So what you end up with is quite a nice looking Site that makes it extremely easy to access relevant information. And this is what we're going to be building.

We're gonna stick with this theme for travel company, but we're gonna give it a different name, but I will be using a lot of the same images. So without further ado, let's dive into our first lesson.

Video: Course Close

Deb: Well, a massive congratulations everyone for making it all the way through this SharePoint course. I hope you guys enjoyed running through the course as much as I enjoyed hosting it for you.

We really have learned so much throughout this course. From creating our first SharePoint Site to building Lists and Libraries, seeing how we can create and manage Documents, utilize all of the Integration features that we have with other Microsoft Applications, and streamline our work by setting up Workflows.

We've also seen how we can create our own SharePoint Web Pages, and really build essentially what is a little intranet Site for our team. I've showed you how you can display information on those pages, how we can customize the Permissions so that only the people who need access have access. And finally we saw how we can change the overall Appearance of our Site.

As with everything, learning is an ongoing process. So now I'm going to pass the baton across to you because the best way to learn SharePoint is to use it yourself. However, I hope this course has given you the confidence and the knowledge to at least get started and has given you a good foundation from which you can build more advanced skills.

Once again everybody, thank you so much for choosing us. My name is Deborah Ashby, and I hope to see you on another training course. Bye for now.

Video: Creating a Communication Site

Deb: So let's start right from the beginning and create our Communication Site. So I'm just here at the SharePoint hub, the Home page where I can see all of my recent Sites. And this is where we can create a new Team Site or a new Communication Site from.

So all we need to do here is jump up to the plus where it says Create Site. And you get a choice of Team Site or Communication Site. So in this example, we're going to create a Communication Site. And you can see here you get to choose the design. And just below you can see a preview as to what that design is going to look like. So currently, the one that I have selected is called Topic. If I was to choose something like Showcase, you can see I get a slightly different format. And if I choose Blank, I can basically build it from scratch.

Now I am going to use a template, I'm going to use Topic. But what I am going to do is I am going to customize this layout quite a bit, I now need to give my Site a name. So remember, we're sticking on this theme of it being a travel company. So let's call this on Wanderlust Travel. SharePoint goes away to check that that Site address is available, which it is, and I can add a Site description. I'm going to keep my language on English. But obviously if you need to change that, then please feel free from the menu. And then let's click on the Finish Button.

So SharePoint is now going away and creating that very basic Communication Site. And this is basically what you'll get. You can see we have the title up in the header Wanderlust Travel, we have some basic links to different parts of the Site. And then we have some default placeholders. So default images, default links, things like that. And of course, we're going to need to customize all of this so that it's relevant to our employees.

Now, the first thing that I'm going to do here is I'm going to go in, and I'm just going to add my company logo. And again, this is just an image that I've created in PowerPoint. But obviously, if you have your own company logo, make sure you have it downloaded onto your PC, and then it's a very simple process just to upload it. So what we're going to do is we're going to go up to the cog icon in the top corner, this contains all of our Site Settings. And for this, I need to go down to Site Information.

Again, I can see here, my Site name, my Site description, I could delete the Site from here as well, if I wanted to, we're not going to do that. What we want to do is we want to change the Site logo. This is going to jump me to my local drives where I have my logo saved off. And there it is, just there. Let's click on Save. And now I have my logo Listed out in that header. Another thing I might want to do here, and this might be something that you want to do at the beginning, or maybe at the end, once you've added all of the information is I'm going to change my Site theme. So the colors that are being used in this Site.

So once again, let's go up to the cog. And this time, we're going to go down to Change the look. Now I have four different sections that I can customize in here. And the first one is the Theme. So again, this really all depends on what color scheme you want to use. And I want to have a kind of greeny theme, so we're going to go for teal. And let's click the back arrow. Because we're

going to save all of these changes in one go. Let's expand Header and see what we have in here. Remember, we can choose the layout of that header. So I can go for Minimal, which makes it very small, Compact, Standard, or Extended. Now I think I'm gonna go for Compact. I can also choose a background for my header.

So currently, I just have a plain white background, I could add a light gray shading, a light bluish color shading, or I can use my theme color. Now I think for me at this stage that is a little bit of overkill, I'm just going to have a very slight graded header. I can choose if I want to show the Site title, which I do in this case, and I'm happy with my Site logo thumbnail and my Site logo. Let's click the back arrow and go to Navigation. I can choose if I want a Mega menu or a Cascading menu. And you'll notice this when we start to add sub menus to some of these menu items.

So do I want those menus to drop down or cascade out to the side. Now for this I'm going to say Mega menu. And I can choose if I want to even display that Site Navigation. So I could completely turn that off from here as well. Let's go back and take a look at the last one. We can add a Footer to our page if we want to. And again we have two choices; Simple or Extended, and Extended is larger than Simple.

I could add a logo which I actually am going to do. Let's add these same Wanderlust logo and the display name is just going to say Wanderlust Travel Inc. And I'm going to give that a gray background as well. Let's click Save to save all of those design changes that we've made. And there we go. So let's scroll all the way down to the bottom and take a look and you can see there we have the logo and the company name in that Footer area.

So, that is how we create Communication Site, very simple and straightforward, and how you can customize the look and feel.

Video: Uploading Documents to the Document Library

Deb: So now that we have the bare bones design of our Communication Site, it's time to start adding some content. I'm going to start by populating the Document Library with the relevant documents for my team. If you take a look at the menu running across the top, you can see one of the links we have there is Documents. And if I click it, it jumps me to that default Document Library with those default headings. And currently, I don't have any documents in there. So let's sort that out straightaway.

Now I have a whole bunch of documents saved off to my local drives that I want to upload. And remember, there are a few different ways that you can upload documents into your Document Library. I could choose to click the drop down menu and select Files. Alternatively, if I already have a File Explorer open, I can drag and drop these files into that Document Library. And that is exactly what I'm going to do in this case.

So I want to take all of these files, I'm going to hold down Shift to select them all, drag and drop. And SharePoint is going to go away, and it's going to upload all of those documents. So a really, really quick process to get all of those in there. Now that I have those documents in the Document Library, I'm going to make some modifications to the information that I can see, we're going to add some columns. Now remember, by default, the standard document view is All Documents. And I can see that just there. So what I want to do is edit the All Documents view, so edit the current view, and add in a couple of different columns.

So some information that I'm interested in seeing is the File Size of each of these, and also the Version. So I'm going to select both of those columns, and click on Ok. You can now see that the view has updated and I can now see that information. What I also want to see in here is I want to add another column, a custom column that shows which department is responsible for each of these documents. So for this, we're going to click the drop down. And remember, we have to choose the type of information that we want in our column.

So I'm going to select Choice, because I want to have some control over the information that's going into this List. So let's give this a title of Team. The description is, "Team that has ownership of this document", the type is Choice, and I'm just going to type in the different teams. So let's say Marketing is our Choice 1, Sales is Choice 2, and we'll say Customer Service is Choice 3. And now, I can click Save. A new column has been created. But because I already have existing documents in here, I need to go through and assign a team to each of these documents.

So I'm going to edit this List in Grid View, click in Team where I get my Choices. So this first one is going to be for Customer Service, this next one Sales, the next one is also Sales, this one is Customer Service, and then the final two are going to be Marketing. Perfect. Let's exit Grid View. Now the final thing that I'm going to change on this List is I'm going to add in three more views for those different teams so that they can just come in here, switch to the view for their relevant team and just see the documents that are relevant to them.

So up to Documents, and we're going to create a new view. This first view is going to be for the Customer Service Team. I want it as a List, let's click Create. It's switched me to the Customer Service view, but I need to define the parameters. So I need to tell SharePoint that when I'm in this view, I only want to see the documents for Customer Service. So I need to edit my current view. We're going to go all the way down to the Filter area, and I'm going to say show items only when the following is true.

So when the Team is equal to Customer Service, and click on Ok. And there we go. So I can now toggle between Customer Service and All Documents. Let's do it one more time and create a new view for the Sales Team. So create new view, we're going to call this Sales, click Create, and once again, we need to go in, edit that current view, and we need to apply a filter. So only show items when the Team is equal to Sales, and Ok. I'm gonna do exactly the same for the Marketing Team, but I'm gonna do it off camera. So join me back here in a couple of moments.

So there we go. I now have essentially four different ways of viewing this Document Library. I can view All Documents, or I can view documents for a specific Team.

Video: Creating a Picture Library

Deb: As we know, Document Libraries aren't the only Libraries that you can add in SharePoint Online. There are lots of different types of Libraries, including a Picture Library. And that is basically what I want to add into my Site. I want a very specific Library that just holds Pictures. Now, can you remember where we go to add different types of Library? What if you said we need to add an App, you would be exactly correct. And there are two different ways that we can add an App, I can click the new drop down and go down to App. Alternatively, I can click the cog in the top right-hand corner and add an App from here.

Now, take a look at what happens when I go in to add an App. Because there is something very different with a Communication Site, as opposed to a Team Site. When you create a Communication Site, by default, you don't have access to very many Lists, or Library templates. And if you take a look through here, I'm looking for the Picture Library, and I can see that there isn't one. Now don't worry too much about this. If your List looks very slimmed down, you just need to turn on a small setting and then you'll be able to see all of your Lists and your Libraries.

So what we need to do here to get those to display, come back out to our Home page, go up to the cog to open up our Settings and select Site Information. And we want to view All Site Settings. Now there's a whole load of different Site Settings in here. But the one that you want is underneath Site Actions. It's this one here Manage Site features. And what you need to do is basically go through this List. And if we go all the way towards the bottom, you can see here Team Collaboration Lists. And it says, "Provides Team Collaboration capabilities for a Site by making standard Lists such as Document Libraries and Issues available".

So you need to activate this part of SharePoint. So let's activate the feature. And let's double-check that that has been activated, it is. So now, when I go in to add an App, I should find that I have all of the different templates that I'm looking for. So let's do it a different way this time. We're going to go to New, down to App, and there we go. I have all of my Lists and my Libraries back again. So what I can do now is search for my Picture Library, I'm going to type in Picture and click the magnifying glass. And then I can click to add it.

I need to give my Picture Library a name, so I'm going to call this Image Gallery, and click on Create. And once again, it's going to jump me across to my Site Contents page. And you can see here there is my Image Gallery. Now remember, by default, I can't see this on this menu running across the top. And essentially what I want to have is the Image Gallery, I want that to be a sub link of my Documents Library.

So the first thing I need to do here is click on Show Actions, go into the Settings, jump into List name, Description, and Navigation, and add it to that Quick Launch Menu. Click on Save. So now when I go back to Home, you can see running across the top, it says Image Gallery.

Now this isn't quite in the correct position in this menu, but we're going to deal with that in a moment. First, let's add some images to our Image Gallery. Once again, it's currently blank. But I do have some images stored off locally that I want to add to this gallery. So I could drag and

drop, but this time, let's use the Upload Button. I'm going to say Upload Files. Here are my image files. So I don't want all of these, I'm going to select the ones that I want. And this is really all of the images of the trips that we offer, and click on Open. And SharePoint is going to go away and it's going to upload those 11 files.

Now because this uses the Picture Library template, you can see that the way that these are displaying looks very different from my standard Document Library. And I have Tiles selected. And when you select Tiles, it basically allows you to see a preview of the Picture in the thumbnail. I could if I wanted to, choose Compact List, so it looks more like a Document Library, or just a List, which gives a bit more space in between each item.

Now I actually like to have Tiles selected in here. And of course, you could go through and do a similar thing to what we did in the Document Library. You could create a new view, filter, sort all of those kinds of things. But for the time being, I'm just going to leave mine as they are with this one view. The final thing I want to do here before we leave this lesson is I want to make the Image Gallery assembling of documents. So for this I need to edit this Quick Launch Menu.

So let's click the Edit link and you can see on the left-hand side, it opens up the Navigation and I can then start to make edits from here. Now, I think actually, I want to change this from Image Gallery to Image Library. So let's click the three dots and say Edit, and change this to Library and click on Ok. Now what I want to do is make this a sub link of the Document Library. So I'm going to click the three dots. Let's move it up so that it's underneath and then I can say that I want to make sub link and click on Save at the bottom.

So now take a look at my Quick Launch Menu; I have a drop down, and if I hover over, I now get a menu drop down, which allows me to easily switch between my Document Library and my Image Library.

Video: Importing List and Alert me

Deb: So, let's carry on adding content to our Communication Site. So what I want to do now is I want to add a List of all of our travel Contacts. And I have this List stored off in an Excel document. So what I need to do here is import this List from Excel into SharePoint.

So I'm going to start on my Home page, and go across to New, and down to List. I want to create a List from an Excel document, and now I can upload my file. And the file I want to upload is this one just here. So let's select it and click Open, it's going to take a look at that Excel file, it's going to find the data which is in a table in the first sheet, and it's going to import that into SharePoint. Remember, the important thing here is to go through and check to make sure that the type listed at the top is correct for the information in the column below.

Now, all of these columns contain text, so I don't need to make any changes. Let's click on Next. Now I need to give my List a name because by default, we get this very long, default name. So I'm just going to call this the much shorter Contacts. Let's give it a description. So, Travel Industry Contact List. And Yes, I want to show this in the Site Navigation. Let's click on Create.

And as you can see, those Contacts have very quickly been imported into a brand new Contacts List. And of course, if you wanted to, you can go through and do exactly the same thing. You can add columns, you can create different views, whatever suits what you're trying to do.

Now, what I'm going to do is I'm going to set up Alerts on this List, I want to receive a notification anytime something changes in this Contacts List. So if a new Contact is added, or if one is deleted, or even if an existing Contact is changed, I want to be notified. So for this, we're going to set up an Alert me. We need to click the three dots, select Alert me, and then define our parameters.

I want to send alerts to myself, I want to receive them via email. I want to be alerted when anything changes. And I also want to be sent alerts whether I change it or somebody else changes something. And I want to be sent a notification immediately. So pretty much I'm leaving all of these settings on the defaults, and click on Ok. So let's give this a quick test.

I'm going to very quickly add a new Contact, and this person is going to be Olivia Jones. She works at Bespoke Luxury, her city is London, and let's just give her a business phone number. And that's what I'm going to add. Let's click on Save.

Now, because I've added that new record and you can see the new record there at the bottom, I would expect to be alerted to this fact. Now sometimes there's a little bit of a delay with the alert in the bottom right-hand corner of the screen. But if I go to my Outlook, I should find that I do have an email. And I do, it's there at the top, which is telling me that this new record has been added.

So I can see that that is in fact working correctly. Now the final thing I'm going to do here is I'm just going to rearrange the order of this Quick Launch Menu. So let's edit it, and I'm going to

SharePoint Online

take my Contacts and I'm going to move that up, so that it comes after my Document and Image Library. And click on Save and back to Home.

Video: Creating a Discussion Board

Deb: The next thing that I'm going to add to this Communication Site is a Discussion Board. So somewhere where all of my team members can go to ask questions, get feedback, and answers. And remember, Discussion Boards again are, they are just a List. So we can find those in the same place as all of the rest of our List and Library templates.

So if we click the New drop down and go down to App, we can then search for Discussion. There it is, let's select the Discussion Board. And I'm going to call my Discussion Board, let's just call it Discussion, and click on Create. Once again, it's created it, it jumps us back to Site Contents, I can't see Discussion listed in my Quick Launch Navigation, so I'm going to need to add it.

So if we find it in our List, click the three dots to show More Actions, and go down to Settings. List name, Description, and Navigation. And Yes, I want to show this in the Quick Launch Menu. And click on Save. So now I can see it sitting there at the top. Let's jump into our Discussion Board, and I can go in and start adding new discussions. So let's just add one.

And I'm going to say that we've had a new travel warning about one of the areas that we run tours to. So let's say Travel Warning, Southeast Asia. I'm gonna say; "Hi, guys. Has anyone got an update on the latest travel warning from the government website for South East Asia"? Now because this is a question, I'm going to make sure that I put a tick in this box which is going to allow people to reply to this question, and let's click on Save. It is as simple as that.

The final thing I'm going to do is go back to home and once again, I'm going to reorganize this Quick Launch Menu. Let's click on Edit, and I'm going to move Discussion up and I want this to come after Pages. Click on Save.

Video: Adding Web Pages

Deb: So currently, my Communication Site just consists of this Home page, the Wiki page as we refer to it, and nothing else really. We don't really have any other pages. So that's what we're going to do next. We're going to add three pages with information about three of the different tools or trips that we run.

So for this, we're going to go to the New drop down, and I'm going to select Page. And you can see that I get a choice of three different templates for my page. I can choose a Blank, which is the default, Visual, and you get an idea as to what that's going to look like, or Basic Text. And I think for this page, I'm going to stick with this Basic Text, I want a nice image in the top, and I want a two column layout. So let's choose this template and click on Create Page. So now I have my new page, I can start to customize it.

So the first thing I want to do here is I want to add in a different background image. So this page is going to be for our Discover India trip. So if I click on the image, you'll notice on the left-hand side, I get this little toolbar pop up where I have options to edit the Web Part, change the image, set the image focal point, or reset to the default image. So I'm going to say Change Image. And there are lots of different locations where I can pick up an image from. I can search through some stock images, if I want. I can search the web.

If I have an image stored in OneDrive, I can go to there, and I can go to a SharePoint Site to look for an image. I can upload one from my local drives, or I can insert one from a link. So I'm going to upload and I'm looking for a picture of India, I can see that one there in the middle. And let's click on Open. So now that I have the image uploaded into SharePoint, I can now say that this is the one that I want to use by clicking Add Image in the bottom right-hand corner. And what I can do here is I can drag the focal point, if I'm not particularly happy with the position of this image. So you can see I can drag it up, or I can drag it back down again.

So I'm going to drag it to about there. And now I can add a title for this page. And this page is going to be for our Discover India trip. And if I want to edit this Web Part further, I can use this toolbar and select Edit Web Part, which is going to open out a pane on the right-hand side where I can choose to display different elements in a different way. So it really depends how you want this to look. Now I think I'm going to stick with image and title.

I can choose if I want the title aligned to the left or to the center. And what I can do is I can add some text above the title. So I'm going to enable this option. And if we take a look now you can see we have a little blue text box, which I can edit to display something else. So I'm going to say New for 2021. I'm also going to choose to show the published date underneath. That is it. Let's close this pane down, and I'm pretty happy with how that looks.

Obviously I can go through and I can start editing each of these Web Parts adding my own text and formatting where necessary. But for now, I'm happy with this page, let's click on Publish to set that live. Now notice that when I publish, I automatically get a menu pop out on the right-hand side where I have some actions that I can take. So I can do things like save this page as a

template, I can post this as News on the Site. But what I want to do is I want to add this page to my Navigation. So let's click close this down. And if you now take a look at the Quick Launch, I have a link to Discover India.

Now once again, I don't want this page on its own up here in the Quick Launch Menu. I want this to be listed in a drop down menu underneath Pages. So I'm going to Edit, find Discover India, I'm going to move it up so that it's underneath Pages, and then I'm going to make it a sub link and click on Save. Let's add another page so you can see that process again. We're going to go to the New drop down, down to Page, we're going to select our template and I'm going to keep this consistent by choosing Basic Text. Create the page, give the page a name, so let's call this Explore Greece.

I'm going to change the image for this Web Part. I'm going to upload an image and I'm going to use this image just here. Let's add it to our Web Part, and then drag to set that focal point. So I think about there. I'm going to edit the Web Part, I'm going to show the block above title, and we're going to give this a title of Europe. And I'm also going to show that published date. That is it, let's click the Publish Button. And once again, I'm going to add the page to the Site Navigation. And we're going to edit, move the page up, and then make that a sub link and click on Save.

So, you can see here how I'm building up different pages, and you can see the links up here. Now I'm going to go in and I'm going to add another page for Magical Morocco in exactly the same way, and then I'll see you in the next lesson.

Video: Assembling a Wiki Page

Deb: So now we have some content added into our Communication Site, it's time to start assembling and organizing the Wiki page or this Home page that you can see in front of you.

Remember, the Home page is really just a way of displaying different pieces of content to make them easy for users to access. And Wiki pages in general are assembled using different types of Web Parts. And by default, you can see the Web Parts that are part of this particular template. So we have some Tiles at the top here, which contain links to other web Sites. And then I have some Blocks for News. So I can create some News posts, I can add in some events, and also I can show my Document Library.

Now none of this looks exactly as I want it to look. So we're going to need to do quite a bit of editing here. Now before we get onto that, I just want to highlight to you something which I maybe should have highlighted in the last lesson. If you remember, we added in three Pages to our Site. And if I hover over Pages in this Top Navigation bar in the Quick Launch, you can see I have Discover India, Explore Greece, and Magical Morocco. Now I don't particularly like the way that these are displayed. I don't like them running horizontally across the screen, they're kind of big and a little bit ugly. And that is because I've chosen what they call the Mega menu layout for the Quick Launch Menu.

And what I want to do is change this to Cascading so that they're a bit smaller, and they run vertically down the page instead. So I can do that very simply by clicking the cog icon in the top corner and going down to Change the look. And from here, I want to select Navigation. You can see that I have Mega menu currently selected, but I'm going to change that to Cascading and click on Save. So now what you'll notice is when I click on Pages, I get a much neater drop down menu.

So now that we have that sorted out, let's start to edit the Wiki page. Now to make any changes at all to this Home page, you need to be in Edit mode. And you'll find the Edit Button all the way over on the right-hand side. So let's click it and start to make some edits to our Site. Now one thing to note when you're editing this page is that your page is divided down into different sections. And you can see as I hover my mouse kind of at the top, here, I have a little plus, which will allow me to add a new section. You can see I also have a plus a bit further down if I want to add a section underneath this first section.

Now what I want to do here is I want to edit this Web Part. So when I click on the Web Part, I get another menu, which is going to allow me to do that. So let's edit the Web Parts. And instead of five tiles, I actually only want to display three. So let's select three, and click on Close to change that. Now what I want to do is update this so it's relevant to my team. Because currently, I just have some links to some random articles.

So once again, I'm going to edit the Web Parts. And what I want to display in each of these parts is a quick way of getting to the different trip pages. So our pages for India, Morocco, and Greece. So basically, I need to change my links. So for this first one, I'm going to click Change, and I can

grab a link from anywhere. So I might want to grab a link to a page that I've recently created. I might want to link to a stock image or something in OneDrive, I might want to upload something or I might want to just copy and paste in a link.

Now for this, I'm linking to actual pages within my SharePoint Site. And the first one I want to link to is Discover India. There it is, let's select it, and then click on Insert. I'm going to change the title to Discover India. And then I can choose the background image that I want to use. So currently, I have a Custom image there, I'm going to say Auto-select image because there is an image contained on this page. And I'm going to use that instead.

Now remember, again, if you want to adjust the position of the image within this little window, if you click on Set focal point, you can drag it around and position it correctly. And I'm pretty happy with how that looks. I'm going to do exactly the same and add in links to the other two pages. So let's click on this Web Part, let's say Edit, I'm going to change where it links to because I want this one to link to the page for Greece. Let's select the Page, click Insert, I'm going to change the background image, let's auto-select the image, that looks just about perfect. And we can change the title to Explore Greece.

And then the final one. Let's select it, edit that Web Part, change the link so it links to the Magical Morocco page, Insert. Let's give it a title; Magical Morocco. I'm going to auto-select the image from the page and that is it. Close, and let's Republish our page.

Video: Adding News Items

Deb: So now it's time to add some News items to our SharePoint Site. And this might be something that you want to add so that everybody in your team can keep on top of the latest News in the industry. So let's scroll down, you can see that we have a News section just here. Now there are two different ways that you can add News, you can either add a News post or a News link.

Now a News post would be something that you create. So if I select News post, it basically creates a brand new page for me. I can choose one of these templates or just choose a Blank, and then I can type in whatever that News is from scratch. So essentially, create my own News article. Now, in this case, I don't want to do that, what I want to do is I want to add a link to a page from a website. So for that, I would use News link. So let's click News link. And this is very straightforward. All we need to do is paste in the link to the Web Page.

Now I have a couple of pages already opened down here. And these are just from the travel section on the BBC website. I'm going to grab the URL, Ctrl + C to copy, and then we're just going to Ctrl + V to paste that in. It goes away and it grabs that page's information. And it also gives a default preview image. So it grabs an image from that Web Page to use as the thumbnail. And you could change that if you wanted to. In this case, I'm pretty happy with the one that I have.

I then have the title. Now I'm going to leave that as the title of the page. And I'm also going to leave the description. And let's click Post. And that's now posted to my Home page. I'm going to add one more. So let's go to Add ,and News link. I'm going to grab another page from the travel section of the BBC website Ctrl + C to copy the link and Ctrl + V to paste in. I'm going to leave everything as it is and click on Post. And I could carry on going. It really depends how many items you want to display on this Home page. When a user clicks, it's going to take them out to that external link, and they can then read the article.

Now it might be that I decide that I don't particularly like the way that these are displaying in this kind of two-column layout. So what I could do is I could edit the Wiki page, I'm now in Edit mode, and then I can use this little toolbar to edit the Web Part. And this is going to allow me to change the way that these are laid out.

So currently they are in Side-by-side layout. I could choose Top story layout, List, Hub News, Carousel, or even Tiles. Now I don't mind the Side-by-side layout as much, so I'm going to click to select that.

You can even specify how many News posts you want to display on this page. So it might be that you have 10 or so. But you only want to display four or five of them. So that's entirely up to you. Also, remember when it comes to editing these different Web Parts, you can move your Web Parts around, which we're going to do in a moment, you can also duplicate the Web Part.

SharePoint Online

So if you want to add another one that's exactly the same, you can do that. And of course, you can delete Web Parts as well. Just remember every time you do make changes, you do need to Republish so that those changes are now live.

Video: Adding YouTube Videos

Deb: Pretty much all of the changes that we've made to this Wiki page, the Home page so far, have just been changes to existing Web Parts that are part of the template. So we've modified our links and our images up here, we then moved down, and we added in some News articles.

Now what if I want to add a different type of content to this page. Maybe I want to add in a YouTube video. Well, there is a whole world hidden away of different Web Parts that you can add. So the first thing we're going to do here is we're going to put our page into Edit mode by clicking the Edit link in the top right-hand corner. And what I want to do here is underneath where we have the News, I want to add some YouTube videos. And I'm going to add three of them.

And what you'll notice is that if I hover over this News Web Part, you can see just underneath there is a plus button. And when I hover over, it says Add a new Web Part in column one. So I have a one column layout in this section of the page. If I click this plus, it opens up a whole world of different Web Parts that I can add. So things like YouTube videos, Twitter feeds, Buttons, Calls to action, different types of Images, different Documents, Lists, and Libraries, Feeds, News, People and Events, and things like Regional information. So, so many different types of content that you can add in.

Now, if I was just to add a YouTube video in here, because I'm working in a one column layout, that YouTube video is going to be very large, and I'm just going to see one YouTube video. Now I actually want to add three YouTube videos, and I want them all side-by-side, next to each other. So I need to add in a new section and change my column layout from a one column layout to a three column layout. So let's do that first of all.

If I move my mouse over to the far left of the screen, you can see we have a little plus just here. So I'm going to say Add new section. I can then choose my section layouts, I want three columns. So let's go in and start adding some YouTube videos. I'm going to click the plus, let's select YouTube, it opens up the pane on the right-hand side. And all I need to do here is copy and paste in either the direct link to the YouTube video, or the embed code.

Now for this, I'm just going to grab some travel videos from the Lonely Planet YouTube channel. And I think we're going to start with this one here, Top 10 countries to visit in 2020. I'm going to click, I'm going to grab the URL, Ctrl + C to copy and then we're just going to Ctrl + V to paste that in. You can see that after a few seconds, it loads it up. And if I want to, I can specify a start time for this video.

So maybe you have two minutes of introduction that no one's particularly interested in, you could choose to start your video at the two minute mark. Now I'm not going to do that, I'm just going to leave it as it is. Click on Close, but I am going to add a caption underneath. And it's as simple as that. Let's add in another one.

SharePoint Online

Click the plus, select YouTube, we're going to grab another link from the same Web Page, and this time, we're going to go for this one. Grab the URL, Ctrl + C, back to our Site, Ctrl + V to paste it in. And we're going to add a caption. And let's do the final one.

Once again, YouTube video, and let's grab this one, Top 10 cities to visit. Same thing, Ctrl + C to copy that link, Ctrl + V to paste in, and add caption. And that is pretty much it. Once you finish, remember to click that Republish Button, and those changes are now live.

Video: Adding a Twitter Feed

Deb: Something else you can add to your SharePoint Site is a Twitter feed. So maybe you have a company Twitter feed, and it's going to be really useful for your team members to be able to keep on top of the latest tweets. So once again, this can just be added as a Web Part.

So we're going to put our page into Edit mode, we're going to scroll down, and we're just going to add our Twitter feed underneath our videos. So once again, all I need to do here is click the plus to add a new Web Part, and this is in a one column layout. So let's just select Twitter. And all we need to do is type in the Twitter username starting with an @ symbol.

Now by default, you'll find that it automatically links through to the Microsoft feed. But I'm just going to change this to the Travel feed. And of course, if you're doing this for your organization, you would put your company name in here. I can choose if I want to show the Twitter Header or if I don't, I can display dividers or I cannot. And I can change the theme color from light to dark.

Now I'm going to keep mine on light, and then I can also choose the number of tweets to show. So I'm actually going to change this from 3 to the last 2 tweets, and click on Close. Now if I click Republish, and just take a look at my page, I can see that this Twitter feed is rather large.

Now I'm going to deal with that in a moment when we do our finishing touches and we move some things around to make the layout look a bit better. But for the time being, let's just leave it how it is. Very straightforward to add in a Twitter feed.

Video: Adding and Formatting Text

Deb: So far, our Communication Site is starting to look pretty good, but it is very image heavy. We have a lot of images in here, and also some videos. So what I'm going to do here is I'm going to break this up by adding in some text. And again, this might be something that you want to add to your Wiki page. Most organizations are going to have some kind of text on their Home pages, as opposed to just images.

So once again, let's add a Web Part and add in some text. So I'm going to put my page into Edit mode. And I think I'm going to add my text towards the top here. So let's click the plus just underneath where we have that first section, I'm going to add a new Web Part. But this time, I'm going to add Text. And you'll see what this does, it opens up a box underneath where you can free type some text.

Now I've got some test text, and I'm just going to copy and paste in. So let's just grab this from a Word document, I'm just going to grab that first paragraph, Ctrl + C. I'm going to click in this text box, Ctrl + V to paste. And of course, I can then go through and make this look a little bit more presentable by adding in some paragraphs. Also note that when you are dealing with text, you will get this toolbar running just above the top where you can apply some formatting.

So if you want to change the Style, maybe add in some headings. So let's add in a heading at the top here. I'm just gonna call this, Very Interesting Information. Let's select it, and I'm going to change that to Heading 1 text. I also have options here for Bold, Italic, Underline. I can change the alignment, I can add in Bulleted Lists, some Hyperlinks, and if I click the three dots for More, it's going to open up the full formatting pane on the right-hand side. And you can see all of the different options that you have for formatting text on your Web Page.

One thing to notice there, if I just go back in is you can also insert a Table into your pages as well. So if you have information that would look best displayed in a tabular format, you can definitely do that from here also. Now remember, once again, when we're working in our pages, we're working in sections. And whatever layout you have applied to the above section is going to apply to the one below unless you add a new section and change that layout.

So if I look at this, which is in a one column layout, and I decide that this information is going to look better in a two column layout, what I would need to do would be to add a new section. So if I click in the section above, and click the plus all the way over on the left-hand side, I can then choose my section layout. So I'm going to say two columns. And I'm actually going to move this section so it's below this section.

And what I'm going to do is I'm just going to grab this information, Ctrl + C, and I'm going to add a new text Web Part, and just Ctrl + V to paste that in. I then have another column over here where I can add my next column of text. So once again, I'm going to choose the Text Web Part, and I'm basically just going to paste in the same thing. Now that I've done it that way, I don't need this Web Part just above. So I can click in it, and just say Delete Web Part.

Let's Republish our page and take a look at what that looks like. And there we go, that looks a little bit better. And I've broken up all of that imagery with some useful information. Now aside from adding in text, if we just put our page back into Edit mode, when you add Web Parts, you can also add things like images, you can add a Hero layout.

Now the Hero layout is basically what we have at the top here where we're displaying Discover India, Explore Greece, and Magical Morocco. It's basically just a series of Pictures or Links. We can add in Section dividers. So if you want to add a horizontal line in between certain elements on our page, we can do that. We can add links, we can add spaces, we can add Image Galleries, so all different types of text, media, and content that we can add. But for the time being, I'm happy with how things look. I'm just going to Republish one more time, and we're going to move on to adding in Buttons and Calls to action.

Video: Displaying Links as Buttons and Lists

Deb: Now let's add into our page, some different types of content. We're going to add in some Buttons and a Call to action. So let's first deal with Buttons.

I'm going to put my page in Edit mode once again. And then just underneath this first section, we're going to add in a Web Part for a Clickable Button. So let's click on Button, you can see what it does here, it's kind of got this little Button shape, I'm going to edit the Web Part. And I need to type in a label for my Button and a link.

So this is all Buttons are, they're basically clickable little Buttons, which will hyperlink to whichever link you've specified. So that might be another page in your Site, you could grab the URL of that and paste that in, or it could be some kind of external Site. So maybe I want to have some Buttons on my page for Sites that my team access all the time. So maybe something like Google just to make it super simple for them. So let's give our label a name of Google. And I can just type in the link; www.google.com, I can change my Button alignment.

So currently, it's aligned to the left, I could put it in the middle, or on the right-hand side. Remember, this is a one column layout that I'm working in, and click on Close. Now what you're probably going to want to do here is if you have more links to add in, you might think to yourself, right, I'm going to add another one next to Google. Now, you can't actually do that, because this is simply a one column layout. So in order to add another Button, I would need to add another Web Part and add another Button that way.

Now, to me, that looks a little bit messy. So I'm going to delete that Web Part. And instead, I'm going to work out in advance how many Buttons I want to have, I'm going to add a new section, and change the layout. So let's click the plus to add a new section. And I'm going to say I want a three column layout. And then I'm going to move this Button into this first column. So then, I can go in, and I can add another Button. I'm going to edit the Web Part. This time, it's going to go to BBC News; www.bbc.co.uk, and click on Close.

And then finally I'm going to add another Button. I'm going to edit the Web Part and this one is going to link out to Foreign Travel Advice. So Foreign Travel Advice. Paste in my link, and click on Close. And then I can decide if I want to reorganize these a little bit better. So for example, if I click on Google and edit the Web Part, I might decide to skin that better if I align it to the middle. And I'm going to do the same for the rest of these. Click on Close and Republish. And I now have links to those Sites in the form of Buttons.

And once again, when I'm kind of looking at the layout of this page, I might decide that these are going to look best if they're right at the top of this page. So once again, I can edit the page, I can click in the section, and I can say Move Section. And I'm going to drag it all the way up to the top and click on Republish. So now that I have those Buttons, they don't look bad, they look a little bit strange, the spacing and a little bit lost at the top there. But that is something you can fiddle around with.

And, these are going to look a lot better a bit later on when I do a final sweep of the layout and start moving things around. I can get these to fit in a little bit better than they currently are. But for the time being, I'm just happy with the content being on the page. Remember, another way that you could display this is by creating a List of links. Sometimes, that can be a bit neater if you do have quite a few links that you want people to be able to access easily. So let's very quickly take a look at an alternative way of doing this by creating some News links.

So what I can do is jump up to New, I'm going to go down to App, and for this I'm going to scroll through and I'm going to find the Links List tile, which is this one just here. Now I could call this Useful Links, and click on Create. It's going to take me to Site Contents, I need to find my page which is just here, and I'm going to add that straightaway into that Quick Launch Menu. So List name, Description, Yes to display in the Quick Launch, and click Save. There it is at the top. Let's click on it and I can now add in those links that I used in the Buttons.

So let's say New item, we're going to do Ctrl + V to paste in the link to the Foreign Travel Advice and my alternative text is going to be Foreign Travel Advice and click Save. I can do exactly the same thing for the other ones. Let's add one more, <http://www.google.com>. My alternative text is going to be Google and click on Save. I can carry on adding in more and more links. So that's just an alternative way of giving users easy access to links that are going to be super useful to them. I can create things like Buttons, or I can create a page that contains a List of useful links.

If I wanted to display these useful links in just a List as opposed to Buttons, I could also edit my page and add that in as a Web Part as well. So instead, what I could do is add a new Web Part, and I could say I want to display List items from this Site. And it's going to bring up all of the Lists that I've created. So in this case, Useful Links, I can add that in as a Web Part, and it displays those links just here.

I can then go in and edit the Web Parts. And I'm going to say I Rant to hide the command bar, and click on Apply. Once I've done that, all I need to do is republish, and I have a different way of displaying those Useful Links. So there we have a three different ways Buttons, Quick Launch Menu, or you can add Useful Links as a Web Part.

Now the final thing I'm going to add to this page is a Call to action Button. And you can add these into your pages whenever you want to encourage the user to take action on something. So for example, maybe I want to add a Button to this page where people can submit feedback or ideas. So for this, I'm going to use a Call to action Button. So let's put our page back into Edit mode by clicking that Edit Button. And I think I'm going to put this just underneath where we have Useful Links. I'm going to click the plus button in the middle to add a new Web Part.

And if I take a look through and go to the Text, Media, and Content group, I have a Call to action Web Part just here. So let's click it. And much like everything else, this Web Part can be completely customized. So the first thing I'm going to change here is the background image that's being used. So currently, I have just this kind of gray, abstract looking background. Let's make that a little bit more interesting. I'm going to edit my Web Parts. And then in the pane on the

right-hand side, I'm going to change the background image. And I'm just going to use something that I already have uploaded. So let's go for this image of a plane wing and click Insert.

And once again, I can change the focal points. So, if we click Set focal point, I want to drag this down a little bit. In fact, let's have a little bit of the land just there, and that looks about right. Now I have a text box where I can type in my Call to action text. So what do I want to say here? Well, I want to say, "Please submit your ideas for new destinations in 2022". And now I need to set up my Button. So once again, I'm going over to this right-hand side Button label, it's just going to say Submit, and my Button link. So I can pretty much link out to anything that has a URL.

Now I want them to be able to send me a message. So I want to link to an Outlook email. So for this, I'm going to type in mail to colon, and then I'm going to type in my email address. Close down the pane and then I can Republish my page. And now I have a very nice Call to action area. So if a user does have an idea to submit, all they need to do is click the Submit Button and it's going to open up a brand new email in the default email application, and they can then straightaway start typing in their feedback. So, lots of different ways that you can utilize Buttons and links on your Site Pages.

Video: Adding Weather and World Clock

Deb: Now just to finish up this page, we're going to add a couple of Web Parts to display Weather information for a specific location, and also Time Zone information. So this is particularly useful if you have a team that is spread across different offices. And again, this is very, very simple.

So, let's scroll down, and I think I'm going to add this information underneath my YouTube videos. So let's put our page into Edit mode. Now what I'm going to do here is I'm going to add a new section. So let's click the plus on the left-hand side, and I'm going to do a two column layout. Now in this first column, let's add a new Web Part, I'm going to select if we scroll all the way down.

Underneath the Regional Information group, we're gonna add some Weather information. Now all I need to do here is type in the location where I want to display the Weather. So let's do London first of all. And there we go, as simple as that. I can add a title at the top. So let's just say Weather. If I want to add another location, I can simply click in the box and search for somewhere else.

So let's say that we have an office in New York so I want to add that. Maybe I want to add for Sydney, Australia, and then let's do Bangkok, Thailand as well, and there we go. Very straightforward. And it's just as simple to add Time Zone information. So let's go to our second column. This time we're going to scroll down and we're going to select the World clock Web Part and once again, let's do it for the same locations.

We're gonna say London, New York, Sydney and finally Bangkok, Thailand. And once again, if you want to, you can change this title at the top here. So I'm going to say Time Zones, click on Republish. And there we have a very nice looking Web Part.

Video: Finishing Touches

Deb: So now, I've pretty much finished adding in all of the content that I want displayed in my SharePoint Communication Site. So the only thing to do is really give this Web Page a final look over and see if there's any finishing touches, or maybe some changes to the layout that I want to make.

So if I have a little look through, I think that possibly a couple of layout changes would make this page flow a little bit better. So what I'm going to do is click the Edit Button, and let's start moving around some sections. So the first thing I'm going to do here is I'm going to go up to just underneath where I have all of these Buttons, and I'm going to add in a new section. And this is going to be a two column section.

And what I'm going to do is take my Hero template down here, and I'm going to grab it, and I'm going to move it up to this section. And you can see automatically how it changes the layout. So now I have my images displayed in more of a carousel so that it fits in to that section or that column in this particular section. And now what I'm going to do is I'm going to grab my Twitter feed, and I'm gonna move that up into that second column, drag and drop. And I think having two tweets displayed is a bit much for this page. So let's edit this Web Part, and I'm going to change that to show one tweet, and click on Close.

Now I'm going to grab these useful links, let's move this Web Part and place that underneath where we have our images. So things are starting to fit in a little bit better now, everything looks a little bit more consistent. Now let's scroll down, I'm fairly happy with this Call to action. I'm happy with how that text is looking and also my YouTube videos. But I think what I'm going to do down here is I'm going to add another section just above by clicking the plus. Let's do two columns once again, and I'm going to move News into this first column. And I'm going to grab Events, and move that into the second column.

And then finally, at the bottom, I have my Document Library. Now instead of having these displayed with a preview of the document, I'm going to change that so it's simply a List. So let's edit the Web Parts. Let's scroll all the way down, and instead of Filmstrip, I'm going to say Display as a List, and click on Close. Now I could carry on going moving things around. But hopefully that gives you a little bit of an idea as to how you can add sections, move Web Parts into sections, and just really organize the layout so it flows in a nicer fashion.

Now something that I didn't show you was this little Quick Links area. And again, this is one of the default Web Parts that you'll see on your Web Page. And this is just some way you can add more links to other Sites or other pages. Now I already have a List of useful links in the Quick Launch at the top, and I also have some Buttons at the top. So, I don't really need this Quick Links Web Part. So let's click on it, and I'm just going to delete that out.

Also People Profiles at the bottom. If you want to essentially showcase various different team members, maybe the people who are in charge of this page or in charge of this project, you can simply add their names down here to make it super easy for people to click on their profiles. And

SharePoint Online

of course, if you want to have comments enabled, remember to toggle on this little switch at the bottom.

So now, my page is looking pretty much as I want it to look. Let's Republish and take a look at the finished article. Now, you can probably design your pages a lot nicer than what I've done here. But hopefully that gives you an idea of the types of content you can add and how you can organize the layout.

Section 12 – Course Close

Video: Course Close

Deb: Well, a massive congratulations everyone for making it all the way through this SharePoint course. I hope you guys enjoyed running through the course as much as I've enjoyed hosting it for you.

We really have learned so much throughout this course. From creating our first SharePoint site to building Lists and Libraries, seeing how we can create and manage Documents, utilize all of the Integration features that we have with other Microsoft applications, and streamline our work by setting up Workflows.

We've also seen how we can create our own SharePoint Web Pages, and really build essentially what is a little intranet site for our team. I've showed you how you can display information on those pages, how we can customize the Permissions so that only the people who need access have access. And finally we saw how we can change the overall appearance of our site.

As with everything, learning is an ongoing process. So now I'm going to pass the baton across to you because the best way to learn SharePoint is to use it yourself. However, I hope this course has given you the confidence and the knowledge to at least get started and has given you a good foundation from which you can build more advanced skills.

Once again everybody, thank you so much for choosing us. My name is Deborah Ashby, and I hope to see you on another training course. Bye for now.