SharePoint 2013 End User
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Accompanying Class Files

This manual comes with accompanying class files, which your instructor or sales representative will point out to you. Most code samples and exercise and solution files found in the manual can also be found in the class files at the locations indicated at the top of the code listings.

Due to space limitations, the code listings sometimes have line wrapping, where no line wrapping occurs in the actual code sample. This is indicated in the manual using three greater than signs: >>> at the beginning of each wrapped line.

In other cases, the space limitations are such that we have inserted a forced line break in the middle of a word. When this occurs, we append the following symbol at the end of the line before the actual break: »»
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1. **SharePoint 2013 Introduction**

   *In this lesson, you will learn...*

   1. About the versions of SharePoint.
   2. About SharePoint site hierarchy.
   3. About Team Site layout.
   4. About navigation within a Team Site.

   SharePoint 2013 is a collaboration tool at its heart. Its primary goal is to make it easy for users to find and share information, and there are many features built into SharePoint to facilitate this. SharePoint's library system feature can provide a superior alternative to the traditional file server. SharePoint lists can be an easy-to-design and easy-to-use alternative to sharing spreadsheet files or more formal database tables. Both lists and libraries can be customized and extended to provide enhanced appearances and functionality, such as calendars and discussion boards, to name a couple. All of this collaboration can be done through a browser interface and in some cases through integration with Microsoft Office applications.

1.1 **SharePoint Versions**

    SharePoint 2013 is available in three on-premise versions in addition to packages hosted by Microsoft. This course will focus on the on-premise versions of SharePoint. Of the on-premise versions there is the free version, SharePoint Foundation, and two versions that require the purchase of licenses, Standard and Enterprise. The differences between the three versions are based on the features they offer.

    SharePoint Foundation's features are, as the name implies, core features in both Standard and Enterprise. Standard has additional features added to what is provided by Foundation. Enterprise has additional feature added to both the features from Standard and Foundation.


    The scope of this course is for the "end user" and most of the features that fall within that scope come with Foundation.
1.2 Team Site Layout and Navigation

**Layout**

SharePoint sites are part of a hierarchy that is grouped in a Site Collection. There is always one site that is the root site of the Site Collection but below that site can be many child sites. Lists and Libraries can be created within each site in the Site Collection. The Site Collection defines the basic storage as well as administration and permissions. In a later lesson in this course, you will explore the basic permissions and how they are applied to each site within the Site Collection as well as each list and library.

The following diagram illustrates a conceptual view of how sites might be organized in a Site Collection. Note that the presentations in this course use a root site named **Contoso Home Site** with a single child site named **Sub Site A**.

**Navigation**

Navigation is a crucial part of using and managing SharePoint. The following walk-through, will navigate the root Team Site named **Contoso Home Site** as well as its single child site **Sub Site A**. The walk-through will highlight different menus and navigation links shared by all the pages in a SharePoint site.
1. Navigate to your team site.
   A. Launch whatever browser you prefer; the examples in this course use Internet Explorer.
   B. Type the address of your team site; the examples in this course use http://spserver2013/sites/student00.
   C. The home page of your team site should look similar to the following:

2. Navigate using the Top Link Bar.
A. The site you are located in can be verified by the **Title**:

The title of the walk-through site is **Contoso Home Site** and the **Home** tab is shaded in the Top Link Bar of the site.

B. Click a link in the site's **Top Link Bar**, other than **Home**, to navigate to the home page of the child site. In this walk-through the child site is titled **SubSite A**.

Note that links in the **Top Link Bar** are not necessarily child sites, they can be links that have been manually created and that navigate to pages within the root site. The default behavior when adding a new child site to a parent site is to add a link to the **Top Link Bar** of the parent site.
C. Note how the **Title** of the child site is shown in the following image.

Sometimes it can be hard to tell that you are on a different site. In this walk-through both sites’ home pages and Quick Launch menus are based on the same Team Site templates, and neither have had any customizations performed on them. The only visual differences at this point are the titles **Sub Site A** and **Contoso Home Site**, and Sub Site A only has the **Home** link in its Top Link Bar because it does not yet have any child sites. In a later part of this course, you will learn how modify the content of pages such as the home page. You will also be adding content to the site that will automatically change the Quick Launch menu.
3. Navigate back to the parent site.
   A. Use the **Back** button of your browser to navigate back to the parent site.

   ![SharePoint screenshot]

   In a later part of this course, you will learn how to configure child sites to use the same **Top Link Bar** as their parent site as well as how to add custom links.
4. Navigate using the Quick Launch menu.
   A. Select the **Documents** inside the Quick Launch menu located on the left side of the page.
B. Navigate back to the home page of the site by clicking the **Home** link within the **Quick Launch** menu.

In later parts of this course, you will learn how to create lists and libraries as well as other items that will automatically add links to the Quick Launch menu. You will also explore how to customize the Quick Launch menu manually.

5. Navigate using the **Settings** menu.
   A. Click the **Settings** menu located at the top right of your Team Site.
B. Take a few moments to read through the list of links in the **Settings** menu. The items you see in the list reflect who you are logged into the site as. The list uses security trimming to show only items that you have permission to use.

In a later part of this course, you will learn how to assign permissions.
Exercise 1  Team Site Navigation
15 to 25 minutes

In this exercise, you will learn to navigate a basic SharePoint 2013 Team Site.
1. Navigate to your team site.
   A. Launch Internet Explorer.
   B. In the address field, enter the address: "http://<<insert your site here>>".
   C. The home page for your team site will load and look similar to the following:

2. Navigate using the Top Link Bar.
A. Verify that you are currently located on the home page of your Team Site, the **Contoso Home Site** link should be shaded blue in the Top Link Bar of the site.

B. Click the link of a child site such as **SubSite A** located in the site's Top Link Bar.
C. Verify that you are now located on the home page of the child site by checking the Title displayed for the site.

It might be hard to tell that you are on a different site. Both sites’ home pages and Quick Launch menus are could be based on the same Team Site templates, and you have not made any customizations to either. The only visual differences at this point are the titles such as SubSite A and Contoso Home Site in the screen captures, and in the example Sub Site A only has its title link in the Top Link Bar because it does not as of yet have any child sites. In a later part of this course, you will modify the content of pages such as the home page. You will also be adding content to the site that will automatically change the Quick Launch menu.
3. Navigate back to the parent site.
   A. Use the **Back** button of your browser to navigate back to the parent site.

In a later part of this course, you will learn how to configure child sites to use the same **Top Link Bar** as their parent site as well as how to add custom links.
4. Navigate using the Quick Launch menu.
   A. Select the **Documents** inside the Quick Launch menu located on the left side of the page.
B. Navigate back to the home page of the site by clicking the **Home** link within the **Quick Launch** menu.

![SharePoint Home Page](image)

In later parts of this course, you will learn how to create lists and libraries as well as other items that will automatically add links to the Quick Launch menu. You will also explore how to customize the Quick Launch menu manually.

5. Navigate using the **Settings** menu.
   A. Click the **Settings** menu located at the top right of your Team Site.

![Site Settings Menu](image)
B. Take a few moments to read through the list of links in the Settings menu. The items you see in the list reflect who you are logged into the site as. The list uses security trimming to show only items that you have permission to use.

In a later part of this course, you will learn how to assign permissions.
1.3 Conclusion

In this lesson, you have learned:

- About the different versions SharePoint offers.
- About the basic hierarchy of a Site Collection.
- About the basic menus and toolbars in a Team Site.
- How to navigate within a Team Site.
2. **SharePoint List Basics**

In this lesson, you will learn...

1. About List Templates.
2. How to work with default lists in a Team Site.
3. How to create a new list from a List Template.
4. How to create a custom list.
5. How to add columns to a list.
6. How to control and validate input into list fields.
7. How to link data from separate lists.

Lists are a fundamental building block in SharePoint that provides a way for users to store and view data. SharePoint comes "out of the box" with many predefined list templates that are easy to use. Lists can be further customized by adding columns to store just about any type of information. Additionally, list columns can be validated as well as linked between other lists. Lists are a very flexible and powerful tool in SharePoint.

2.1 **Creating Apps Using List Templates**

In SharePoint 2013, lists are created by creating Apps. The out-of-the-box Apps you can create include both lists and libraries. The primary difference between lists and libraries is that libraries always store a document with each item, such as a Word document or Excel spreadsheet. Libraries will be covered in a separate lesson in this course.

To create a list App you first select a list template as a starting point for your list. List templates define the characteristics of a list when used to create a new list. The characteristics defined by list templates include the column types, views, and forms for editing and viewing list data.

There are many factors that define the list templates available to a site such as the version of SharePoint and the features that have been enabled in the farm, site, and site collection. New list templates can be easily added to a site so the list templates choices can vary between different SharePoint installations and even sites within a single installation.

The following is a list of some of the default list templates available in an out-of-the-box SharePoint team site.

- Links
- Announcements
- Contacts
2.2 Creating Lists

Creating Lists Using List Templates

The following walk-through will show you how to create new lists using some of the standard out-of-the-box list templates.

All of the lists in this demonstration are created in the Contoso Home Site.
1. Create an instance of a **Contacts** list.
   A. Click the **Settings** menu and then choose the **Add an app** menu item.
   
   B. Scroll down the list of Apps templates and locate and click the **Contacts** template link.
C. Enter "Contoso Contacts" in the **Name** field and click the **Create** button.

**Naming Conventions:** Many website administrators feel strongly about not using spaces when naming a list, library, or new site. The reason for this is that the spaces will be replaced with "%20" characters in the URL. This can make the URL difficult to read and links can become convoluted. The title of the list, library, or site can always be changed after they are created using the properties pages that will be covered in a later part of this course. This will change what is displayed but not affect the URL. For simplicity and readability, the exercises and walk-throughs in this course often include the space in the name and accept the fact that the URL will have the "%20" replacement characters.
D. Note that **Contoso Contacts** are now displayed in the **Quick Launch** menu under the **Recent** heading as well as listed on the **Site Contents** page.

2. Add a permanent link to **Contoso Contacts** in the **Quick Launch** menu.
   A. Click the **Contoso Contacts** link under the **Recent** heading in the **Quick Launch** menu.
   B. Click the **List** tab to navigate to the **List Toolbar**.

There are no items to show in this view of the "Contoso Contacts" list.
C. Click the **List Settings** link button on the **List** tab toolbar.

![SharePoint List Settings](image1.png)

D. Click the **List name, description and navigation** link on the list settings page.

![SharePoint List Settings](image2.png)
E. Click the **Yes** radio button to add **Contoso Contacts** to the site’s **Quick Launch** menu and click the **Save** button.

**Settings › General Settings**

**Name and Description**
Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this list.

**Name:**
Contoso Contacts

**Description:**

**Navigation**
Specify whether a link to this list appears in the Quick Launch. Notes: it only appears if Quick Launch is used for navigation on your site.

- **Display this list on the Quick Launch?**
  - **Yes**
  - **No**

[Save] [Cancel]

The **Name** field is where you would change the name of the list or library without affecting the URL.

F. Note that **Contoso Contacts** now shows on the site's **Quick Launch** menu as a root-level item.

3. Create a new contact item in the **Contoso Contacts** list.
A. Click the **Contoso Contacts** link in the **Quick Launch** menu.
B. Click the **new item** link within the **Contoso Contacts** list.

C. In the **Contoso Contacts - New Item** form, use the following table to fill in the fields and click the **Save** button. Note that only the **Last Name** field is required.

<table>
<thead>
<tr>
<th>Field</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Simpson</td>
</tr>
<tr>
<td>First Name</td>
<td>Marge</td>
</tr>
<tr>
<td>Full Name</td>
<td>Marge Simpson</td>
</tr>
<tr>
<td>E-mail Address</td>
<td><a href="mailto:Marge@Contoso.com">Marge@Contoso.com</a></td>
</tr>
<tr>
<td>Company</td>
<td>Contoso</td>
</tr>
</tbody>
</table>
4. Create an instance of a **Discussion Board** list.
   A. Click the **Settings** menu and then choose the **Add an app** menu item.
B. Scroll down the list of Apps templates and locate and click the **Discussion Board** template link.

C. Enter "Contoso Discussion" in the **Name** field and then click the **Create** button.

D. Note that you could optionally add **Contoso Discussion** as a permanent link in the **Quick Launch** menu as you did with **Contoso Contacts**.
5. Create a new discussion in the Contoso Discussion list.
   A. Click the Contoso Discussion link in the Quick Launch menu and click the new discussion link in the main view of the list.

   B. In the new discussion form, enter "SharePoint 2013 Features" for the Subject field.
   C. Click inside the Body field. Note that the discussion form now has a toolbar at the top with two tabs Format Text and Insert.
Among the many SharePoint 2013 features the following are some of my favorites:

Branding

Mobile devices

Search

Web content management
E. Highlight the list text Toolbars, Silverlight Integration, Dialog forms, and Column validation and then click the Numbering icon on the Editing Tools Format Text tab toolbar.

Note the Question check box. When this is checked, it is used as a filter for an Unanswered Questions view. Views will be covered in a later part of this course.

F. Click the Save button to save it to the list.

6. Read and reply to the new discussion in the Contoso Discussion board.

A. Click the new discussion subject SharePoint 2010 Features link inside the Contoso Discussion list.
B. Click the **Add a reply** text within the text box to create a reply to this post.

![SharePoint 2013 Features](image)

**Student00**

Among the many SharePoint 2013 features the following are some of my favorites:

- Branding
- Mobile devices
- Search
- Web content management

3 minutes ago  Reply  Edit  

C. Type the following text in the body of the reply text box and click the **Reply** button:

> From the list my top favorite is Branding.

D. Note that the reply dialog form has the same editing toolbar as when you created the new discussion item.
E. Verify that the reply now displays under the original.

SharePoint 2013 Features
1 reply

Student00
Among the many SharePoint 2013 features the following are some of my favorites:
Branding
Mobile devices
Search
Web content management

11 minutes ago Reply Edit ...

All replies
Oldest Newest

Student00
From the list my favorite is Branding.

2 minutes ago Reply Edit ...

Add a reply

2.3 List Columns

Creating List Columns
In this walk-through, you will learn to create a new list using the Custom List template and add various list columns to it. Although any SharePoint list can have custom columns added to it, the Custom List template creates a nice clean list to work with.
1. Create a new list in your Team Site using the **Custom List** template.
   A. Click the **Settings** menu and then choose the **Add an app** menu item.

   ![Settings menu with Add an app selected](image)

   B. Select the **Custom List** template from the list of available templates.

   ![Site Contents with Custom List app highlighted](image)

   C. Enter "Demo List" in the **Name** field and then click the **Create** button.
2. Add a new **Single line of text** list column to **Demo List**.
   A. Click the **Demo List** link in the **Quick Launch** menu under the **Recent** group.

   ![Diagram of Quick Launch menu with Demo List highlighted]

   B. Click the **List** tab to open the lists toolbar.

   ![Diagram of SharePoint interface with List tab highlighted]
C. Click the **Create Column** button link in the **List** tab toolbar.

The **Create Column** button might not display the text next to the icon if your browser window is not wide enough.

D. Enter "Favorite Food" in the **Column name** field and leave the default for **The type of information in this column is**: option field set to **Single line of text**.
E. Note the **Additional Column Settings** region that allows you to set options for this **Single line of text** list column. Leave the options set to their defaults and click the **OK** button to complete creating the new list column.

![Additional Column Settings](image)

3. Add a new **Choice** list column to **Demo List**.
   A. Click the **Create Column** button link in the **List** tab toolbar.
   B. Enter "Favorite Color" in the **Column name** field and change **The type of information in this column is:** option field to **Choice**.
C. In the **Additional Column Settings** region, type some colors into the field labeled **Type each choice on a separate line** and change the **Display choices using** field to **Radio Buttons**. See the following image for some suggested colors to add:

Note the **Display choices using** options that include **Radio Buttons** and **Check Boxes**. The check boxes allows for multiple choices and the radio buttons provides an alternative display for single selections. The default
Drop-Down Menu takes up the least amount of room if the column is included in a view. Views will be covered in a later part of this course.

D. Click the OK button to complete creating the new list column.

4. Add a new Date and Time list column to Demo List.
   A. Click the Create Column button link in the List tab toolbar.
   B. Enter "Birthday" in the Column name field and change The type of information in this column is: option field to Date and Time.
   C. In the Additional Column Settings region, change the Require that this column contains information option field to Yes and the Default value option field to Today's Date.

D. Click the OK button to complete creating the new list column.
5. Add a new Person or Group list column to Demo List.
   A. Click the Create Column button link in the List Tools List tab toolbar.
   B. Enter "Who" in the Column name field and change The type of information in this column is: option field to Person or Group.
   C. In the Additional Column Settings region, change the Show field drop-down box to Work e-mail.
   D. Click the OK button to complete creating the new list column.
6. Create a new custom list and add it as a Lookup list column to Demo List.
   A. Click the Settings menu and then choose the Add an app menu item.

   ![Settings menu]

   B. Select the Custom List template from the list of available templates.

   ![Custom List template]

   C. Enter "States" in the Name field and then click the Create button.

   D. Click the States link in the Quick Launch menu to navigate to the list.

   E. Click the Create Column button link in the List tab toolbar.
F. Enter "Abbreviation" in the **Column name** field and set the **Maximum number of characters** text box under **Additional Column Settings** to "2".

G. Click the **OK** button to complete creating the column.

H. Click the **new item** link in the **States** list.

I. Enter "Florida" in the **Title** field text box and "FL" in the **Abbreviation** text box.

J. Click the **Save** button to save the new **States** item.

K. Repeat the previous steps to create the following **States** items:

   - Florida: FL
   - New York: NY
   - California: CA
   - Georgia: GA
   - North Carolina: NC

L. Click the **Demo List** link in the **Quick Launch** menu to navigate to the list.

M. Click the **List** tab at the top of the list's page to open the **List** toolbar.

N. Click the **Create Column** button link in the **List** tab toolbar.
O. Enter "Home State" in the **Column name** text box field and change The type of information in this column is option field to **Lookup (information already on this site)**.

P. In the **Additional Column Settings** region change the **In this column** drop-down box to **Abbreviation** and select the **Title** check box under the **Add a column to show each of these additional fields** field.

Q. Click the **OK** button to complete creating the new list column.
7. Set **Demo List** to permanently display in the **Quick Launch** menu.
   A. Click the LIST tab to open the toolbar.
   B. Click the **List Settings** button on the LIST toolbar.
   C. Click the **List name, description and navigation** link on the Settings page.

D. Click the **Display this list on the Quick Launch** option to **Yes** and click the **Save** button.

8. Create a sample item in the new **Demo List** to test the results of the custom columns.
   A. Click the **new item** link within the **Demo List** to create a new item.
B. Use the data in the following image as sample data for the new Demo List item, change the Who field data to an account name that exists in your SharePoint installation.

For the Who field, you can optionally click a name from the drop-down list that SharePoint provides.

2.4 Column Validation

Validating a List Column

In this walk-through, you will learn how to enable validation on a custom list column. This walk-through will add validation to the Birthday list column added in the previous walk-through.
1. Configure validation on the **Birthday** column within the **Demo List**.
   A. Select the **Demo List** from the **Quick Launch** menu if you are not already on the list.
   B. Click the **List** tab at the top of the list's page to open the **List** toolbar.
   C. Click the **List Settings** button on the **List** tab toolbar to navigate to the list settings page.

   ![List Settings](image)

   D. Click the **Birthday** link within the **Columns** region to navigate to the column settings page.

   **Columns**
   A column stores information about each item in the list. The following columns are currently available in this list:
   - **Title**: Single line of text
   - **Favorite Food**: Single line of text
   - **Favorite Color**: Choice
   - **Birthday**: Date and Time
   - **Who**: Person or Group
   - **Home State**: Lookup
   - **Home State:Title**: Lookup
   - **Modified**: Date and Time
   - **Created**: Date and Time
   - **Created By**: Person or Group
   - **Modified By**: Person or Group

   - Create column
   - Add from existing site columns
   - Column ordering
   - Indexed columns
E. Expand the **Column Validation** region within the column settings page and enter `=[Birthday]<Today()` in the **Formula** field and The birthday must be earlier than the current date. in the **User message** field.

The formula in this example will ensure that the user cannot enter a date that is the same as or after the current date.

F. Click the **OK** button to save the changes.

2. Test the new column for validation.

A. Select the **Demo List** from the **Quick Launch** to navigate back to the main **browse** view of the list.

B. Click the **new item** link within the **Demo List** to create a new item.

C. In the required **Title** field, enter "Testing" and select a future date in the **Birthday** field.
D. Click the **Save** button. You should get a validation error message similar to the following image:

![Error Message Image]

If you did not get an error message, go back and check our column settings validation formula and make sure it was typed in correctly.

E. Change the **Birthday** date field to a date earlier than the current date and click the **Save** button. The new item should be saved and displayed in the list.
Exercise 2  Working with Team Site Lists

10 to 15 minutes

In this exercise, you will work with some of the default list templates in SharePoint 2013.
1. Create a new Calendar list.
   A. Click the Settings menu and then choose the Add an app menu item.

   B. Scroll down the list of templates to locate and select the Calendar template from the list of available templates.
C. Enter "Calendar" in the **Name** field and then click the **Create** button.
2. Add a permanent link to Calendar in the Quick Launch menu.
   A. Click the Calendar link under the Recent heading in the Quick Launch menu.
   B. Click the Calendar tab to open the toolbar.

C. Click the List Settings link button on the Calendar tab toolbar.
D. Click the **List name, description and navigation** link on the list settings page.
E. Click the **Yes** radio button to add **Contoso Contacts** to the site’s **Quick Launch** menu and click the **Save** button.

Note the option to **Use this calendar to share member’s schedule**. The default is **No**, which makes the calendar events visible to everyone who has view permissions to the list. If you set the option to **Yes**, then events have an added option to invite attendees. Only attendees that have been invited by the person creating the event will see the event when they view the calendar.
F. Note that Calendar now shows on the site's Quick Launch menu as a root-level item.

3. Create a Calendar entry.
   A. Click the Calendar link within the Quick Launch menu. This will take you to a special view of the calendar.
B. Note how this calendar view has added a couple of new tabs to the top of the page next to the Browse tab. In addition, the Quick Launch has been modified with a tool that allows you to change the year and month being viewed.

C. Click the Events tab to get the calendar's toolbar to display.
D. Click the **New Event** link button in the **Events** toolbar.

E. Fill in the form with whatever values you like. You must enter values for the **Title**, **Start Time**, and **End Time** fields. These are required fields as indicated by the blue asterisks next to their labels.
F. Click the **Save** button once you have finished filling out the form.

G. Verify that the calendar displays with a shaded bar and event title across the days the new event is scheduled.

H. Feel free to experiment by creating additional events in the calendar.
4. Create a new Tasks list.
   A. Click the **Settings** menu and then choose the **Add an app** menu item.

   ![Image of Settings menu]

   B. Scroll down the list of templates to locate and select the **Tasks** template from the list of available templates.

   ![Image of Site Contents]

   C. Enter "Tasks" in the **Name** field and then click the **Create** button.
5. Add a permanent link to Tasks in the **Quick Launch** menu.
   A. Click the Tasks link under the Recent heading in the Quick Launch menu.
   B. Click the List tab to open the toolbar.

C. Click the **List Settings** link button on the List tab toolbar.
D. Click the **List name, description and navigation** link on the list settings page.

E. Click the **Yes** radio button to add **Tasks** to the site's **Quick Launch** menu and click the **Save** button.
F. Note that **Tasks** now shows on the site's **Quick Launch** menu as a root-level item.

6. Create a new Task.
   A. Click the **Tasks** link within the **Quick Launch** menu. This should take you to a view of the tasks list.
   B. Note how this tasks list view has added a couple of new tabs to the top of the page next to the **Browse** tab.
C. Click the **Tasks** tab to get the task list's toolbar to display.

D. Click the **New Item** link in the Task list's toolbar to open the new task form.
E. Click the **SHOW MORE** link in the form to open the view the additional task fields.

![Task Form](image)

F. Use the following table for information to fill in the new task form:

<table>
<thead>
<tr>
<th>Field</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title:</td>
<td>Type &quot;Complete lesson on creating SharePoint lists&quot;</td>
</tr>
<tr>
<td>Priority:</td>
<td>Select <strong>(2) Normal</strong></td>
</tr>
<tr>
<td>Status:</td>
<td>Select <strong>In Progress</strong></td>
</tr>
<tr>
<td>% Complete</td>
<td>Type &quot;50&quot;</td>
</tr>
<tr>
<td>Assigned To:</td>
<td>Enter your account name here.</td>
</tr>
<tr>
<td>Description:</td>
<td>Type &quot;Creating and working with SharePoint lists.&quot;</td>
</tr>
<tr>
<td>Start Date:</td>
<td>Select (Date course started)</td>
</tr>
<tr>
<td>Due Date:</td>
<td>Select (Date course ends)</td>
</tr>
</tbody>
</table>
G. Click the **Save** button once you have finished filling out the form.
H. Verify that the Task list displays with the new task you created. Feel free to experiment by creating additional tasks in the Tasks list.
Exercise 3  Create Custom Lists and Columns

15 to 25 minutes

In this exercise, you will learn to create a new list from the Custom List template. In addition, you will learn to modify column properties as well as add new custom columns.
1. Create a new list in your Team Site using the **Custom List** template.
   A. Click the **Settings** menu and then choose the **Add an app** menu item.

   ![Settings menu with Add an app highlighted](image)

   B. Select the **Custom List** template from the list of available templates.

   ![Site Contents with Custom List highlighted](image)

   C. Enter "Favorite Cars" in the **Name** field and then click the **Create** button.
2. Add custom columns to the new Favorite Cars list.
   A. Click the Favorite Cars list from the Quick Launch menu if it is not already selected.
   B. Click the new Item in the middle of the empty list main page. This will open a new list item.
   C. Do not enter anything at this time; just verify that the only field is the required Title field. Click the Cancel button to close the dialog form without creating a new list item.
   D. Click the List tab to open the lists toolbar.
E. Click the **Create Column** button in the **Manage Views** section of the toolbar.

Note that the image is only showing a portion of the list's toolbar due to space constraints. In addition, your web browser window's width will affect the buttons displayed on the toolbar.

F. Enter "Model" for the **Column name** field and leave the default **Single line of text** as the data type for the column.

Take a few moments to read through the additional column settings, but the default values are fine for this exercise.

G. Click the **OK** button to create and save the changes to the new list column.
H. Repeat the steps above to create two additional columns and use the following table for information about the new columns:

<table>
<thead>
<tr>
<th>Column name</th>
<th>Data type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Speed</td>
<td>Number</td>
</tr>
<tr>
<td>Price</td>
<td>Currency</td>
</tr>
</tbody>
</table>

I. Keep the default column settings for the new Top Speed and Price columns based on their data types. Take a moment to note that the different data types have different additional settings. For example, the Currency data type has a currency format selection.
3. Rename the existing **Title** column in the **Favorite Cars** list to **Make**.
   
   A. Verify that the newly created **Favorite Cars** list is selected in your site's **Quick Launch** menu. Select it if it is not.
   
   B. Click the **List Settings** button on the **List** tab within the **Settings** group in the toolbar.
C. Take a moment to read through the list settings page. This page offers links to various list administration task links grouped by category. The group we are going to be working with is the **Columns**.

D. Click the **Title** column link to bring up the column settings page. Note how using this page you can change various settings of the column based on the data type of the column.

E. To rename this column, type over the text in the **Column name** field with the text "Make".

F. Click the **OK** button to save your changes and return to the list settings page.
G. Verify that the old column **Title** has been renamed to **Make** in the column group.

<table>
<thead>
<tr>
<th>Column (click to edit)</th>
<th>Type</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make</td>
<td>Single line of text</td>
<td>✓</td>
</tr>
<tr>
<td>Model</td>
<td>Single line of text</td>
<td></td>
</tr>
<tr>
<td>Top Speed</td>
<td>Number</td>
<td></td>
</tr>
<tr>
<td>Price</td>
<td>Currency</td>
<td></td>
</tr>
<tr>
<td>Modified</td>
<td>Date and Time</td>
<td></td>
</tr>
<tr>
<td>Created</td>
<td>Date and Time</td>
<td></td>
</tr>
<tr>
<td>Created By</td>
<td>Person or Group</td>
<td></td>
</tr>
<tr>
<td>Modified By</td>
<td>Person or Group</td>
<td></td>
</tr>
</tbody>
</table>

H. Click the **Favorite Cars** link in either the **Quick Launch** or the Site's Breadcrumbs to navigate back to the browse view of the **Favorite Cars** list.

4. Add some new **Favorite Cars** to the custom list.
A. Click either the **new item** link within the list or the **New Item** button on the **Items** tab toolbar of the **Favorite Cars** list.

![Image of SharePoint interface]

B. The **Favorite Cars** new item dialog form will open with fields for the custom columns you added earlier.

![Image of new item dialog form]

C. Enter the following values for new Favorite Car item and click the **Save** button to save the data back to the list.

<table>
<thead>
<tr>
<th>Make</th>
<th>Model</th>
<th>Top Speed</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bugatti</td>
<td>Veyron SS</td>
<td>268</td>
<td>2,420,000.00</td>
</tr>
</tbody>
</table>
D. To add multiple cars to the new Favorite Cars list, you can use the edit link to enter items in a spreadsheet type of view. You can use the following table for data to input but feel free to use your own "favorite cars" as well.

<table>
<thead>
<tr>
<th>Make</th>
<th>Model</th>
<th>Top Speed</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSC</td>
<td>Ultimate Aero TT</td>
<td>257</td>
<td>654,500.00</td>
</tr>
<tr>
<td>Koenigsegg</td>
<td>CCX</td>
<td>250</td>
<td>720,500.00</td>
</tr>
<tr>
<td>Saleen</td>
<td>S7 Twin Turbo</td>
<td>248</td>
<td>597,000.00</td>
</tr>
<tr>
<td>McLaren</td>
<td>F1</td>
<td>240</td>
<td>1,100,000.00</td>
</tr>
<tr>
<td>Ferrari</td>
<td>458 Italia</td>
<td>202</td>
<td>150,000.00</td>
</tr>
<tr>
<td>Ferrari</td>
<td>599 GTO</td>
<td>208</td>
<td>383,500.00</td>
</tr>
</tbody>
</table>
E. Compare your list to the following image:

```
Stop editing this list
```

<table>
<thead>
<tr>
<th>Make</th>
<th>Model</th>
<th>Top Speed</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bugatti</td>
<td>Veyron SS</td>
<td>268</td>
<td>$2,430,000.00</td>
</tr>
<tr>
<td>SSC</td>
<td>Ultimate Aero TT</td>
<td>257</td>
<td>$654,500.00</td>
</tr>
<tr>
<td>Koenigsegg</td>
<td>CCX</td>
<td>250</td>
<td>$720,500.00</td>
</tr>
<tr>
<td>Saleen</td>
<td>S7 Twin Turbo</td>
<td>248</td>
<td>$597,000.00</td>
</tr>
<tr>
<td>McLaren</td>
<td>F1</td>
<td>240</td>
<td>$1,100,000.00</td>
</tr>
<tr>
<td>Ferrari</td>
<td>458 Italia</td>
<td>202</td>
<td>$150,000.00</td>
</tr>
<tr>
<td>Ferrari</td>
<td>599 GTO</td>
<td>206</td>
<td>$383,500.00</td>
</tr>
</tbody>
</table>
```

It should look the same or similar depending on whether you used your own "favorite cars" or not. Note the Price column is formatted as currency for you based on the data type you chose for that column.

F. Click the Stop link to exit the editing view.
Exercise 4  Create a SharePoint List with the Import Spreadsheet Template

10 to 15 minutes

In this exercise, you will learn to create a new list and columns by importing data from an Excel spreadsheet. In addition, you will modify the new list so that it displays in the Quick Launch menu.
1. Create a new list by using the **Import Spreadsheet** template.
   A. Click the **Settings** menu and then choose the **Add an app** menu item.

   ![Screenshot of Settings menu with Add an app highlighted]

   B. Search for the **Import Spreadsheet** App template by typing "Import" in the textbox labeled **Find an app** and click the search icon.

   ![Screenshot of search for Import Spreadsheet app]
C. Select the **Import Spreadsheet** template from the search results.

![Import Spreadsheet](image)

D. In the new list form that opens enter "Course List" in the **Name** field.

![New List](image)

E. Click the **Browse** button to select the spreadsheet for the import.

F. In the **Choose File to Upload** dialog window, browse to the folder you copied the class files to and select the **Instructor Led Training Report.xlsx** file. Click the **Open** button to close the dialog window and complete the selection.
G. Click the **Import** button. This should open Microsoft Excel with the selected file loaded. A second dialog window titled **Import to Windows SharePoint Services list** should also open as shown in the following image.

H. In the **Select Range** drop-down field, choose **ProductReleaseScheduleILT!Table1** from the drop-down list. There should only be one choice.

Optionally you could choose **Range of Cells** from the **Range Type** field. This would then allow you use your mouse to click and drag across your spreadsheet selecting the range of cells to import. Having a named table as we do in this example makes it a bit easier to just select the table.

I. Click the **Import** button to complete the import process.
J. Once the Import form closes you will be automatically taken to the **Browse** tab of the new list. Note how new columns have been automatically created based on the column headers of the imported spreadsheet.

![Image showing list settings and columns](image)

2. Add the new imported list to the **Quick Launch** menu.
   A. Note how the new list "Course List" does not have a link in the **Quick Launch** menu. The **Import Spreadsheet** template you used does not have an option to add the list to the **Quick Launch** menu as part of the import process.
   B. Click the **List** tab at the top of the **Course List** list page to open the toolbar.

![Image showing list toolbar](image)

Note that the image is showing only a portion of the list's toolbar due to space constraints. In addition, your web browser window's width will affect the buttons displayed on the toolbar.

C. Click the **List Settings** button on the **List** tab within the **Settings** group in the toolbar.
D. Click the **List name, description, and navigation** link under the **General Settings** group on the **List Settings** page.

E. Click the **Yes** option under the section **Display this list on the Quick Launch?** and then click the **Save** button to save your changes.
F. Note how now there is a new link, **Course List**, under the **Lists** group within the **Quick Launch** menu.

```
Home
Documents
Recent
  Favorite Cars
  States
  Demo List
  Contoso Discussion
Contoso Contacts
Calendar
Tasks
  **Course List**
Site Contents
```

The text for the link in the **Quick Launch** menu is based on the title of the list. The list's title can be changed on the **Site Settings** page using the same **List name, description and navigation** link you used to add the list to the **Quick Launch**.
2.5 Conclusion

In this lesson, you have learned:

- How to work with various List Templates.
- How to work with default lists in a Team Site and add data to them.
- How to create a custom list.
- How to add columns to a list.
- How to control and validate input into list fields.
- How to link data from separate lists.