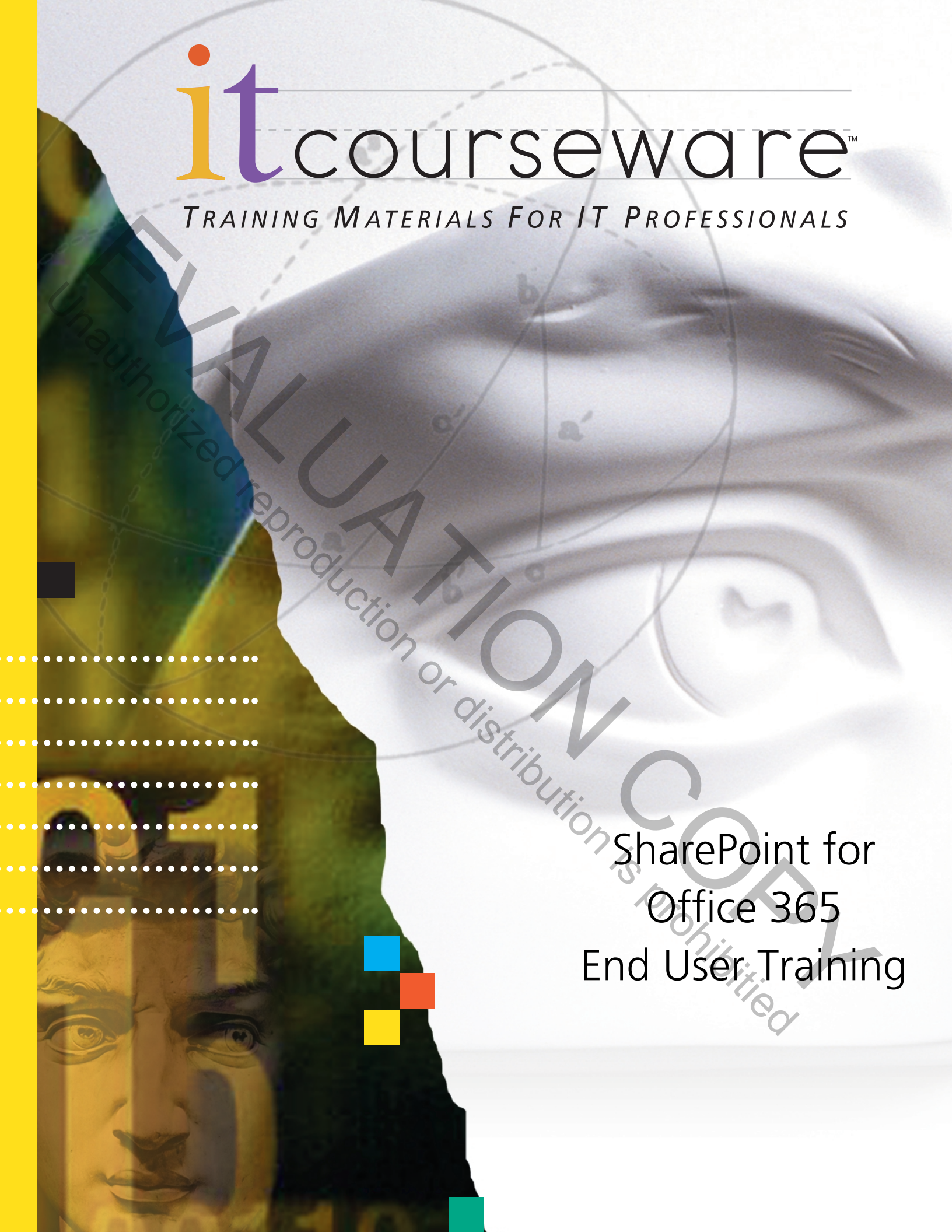
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SharePoint for
Office 365
End User Training

SharePoint for Office 365 End User Training

(SPO2016.1 version 1.0.1)

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The Authors

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Bruce Gordon has been a Microsoft Certified Trainer since 1995. He has taught Microsoft Official Curriculum (MOC) courses on ASP.NET, ADO.NET, XML Web services, Windows Forms, WPF, Silverlight, SharePoint, SQL and various other Microsoft product courses. Bruce is also active in the creation of custom courseware. Bruce's most recent custom courseware include SharePoint titles that are available through the Microsoft courseware library. In the past, Bruce has created courses and materials for certification prepping. Bruce's preferred style of teaching is demonstration oriented. Whenever possible he uses live demonstrations in place of PowerPoint slides. This style of teaching allows Bruce to cover not only topics from a courseware manual but also real-world topics outside the manual. Additionally this style tends to be more engaging to his students. Bruce's classes include plenty of hands-on lab work to give students practical experience working with the technology. Bruce's students consistently provide excellent feedback, commenting on his interactive approach, encouragement of questions, and overall knowledge.

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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 365 Setup

In this lesson, you will learn...

1. How to set up the sample site for class.

You will need a subscription to create a site. Below are the steps to get started.

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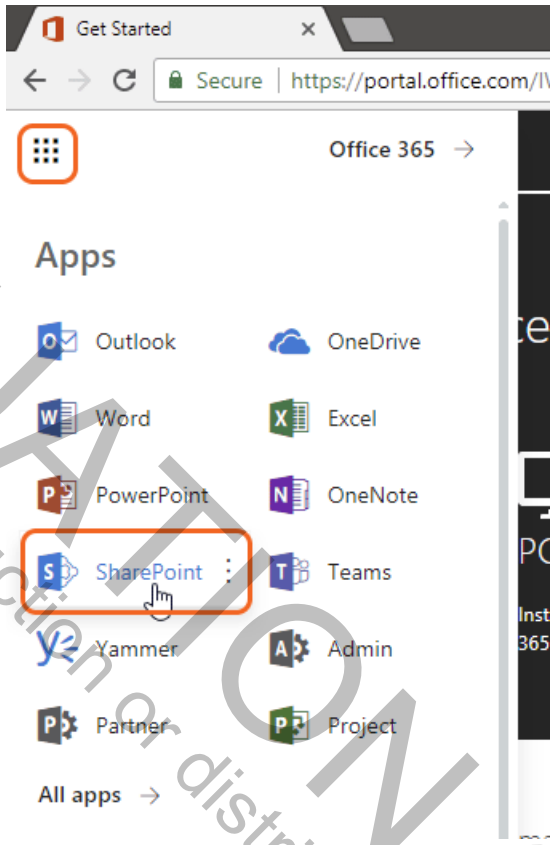
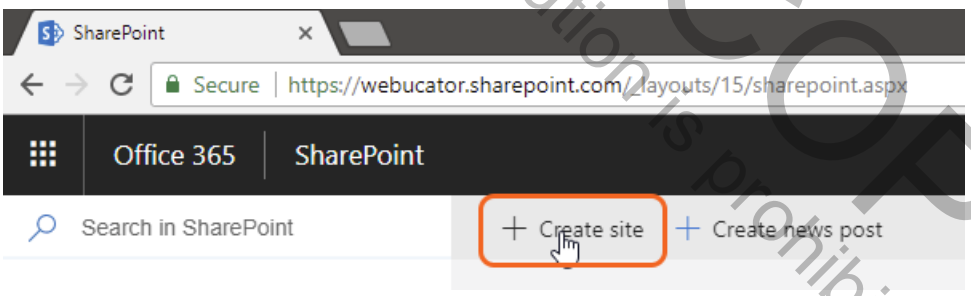
1.1 SharePoint Online

1. Navigate to your Office 365.
   A. Launch your preferred browser.
   B. Log in to your Office 365.
   C. Choose **SharePoint** from the Apps list.



   D. Click **Create Site**.



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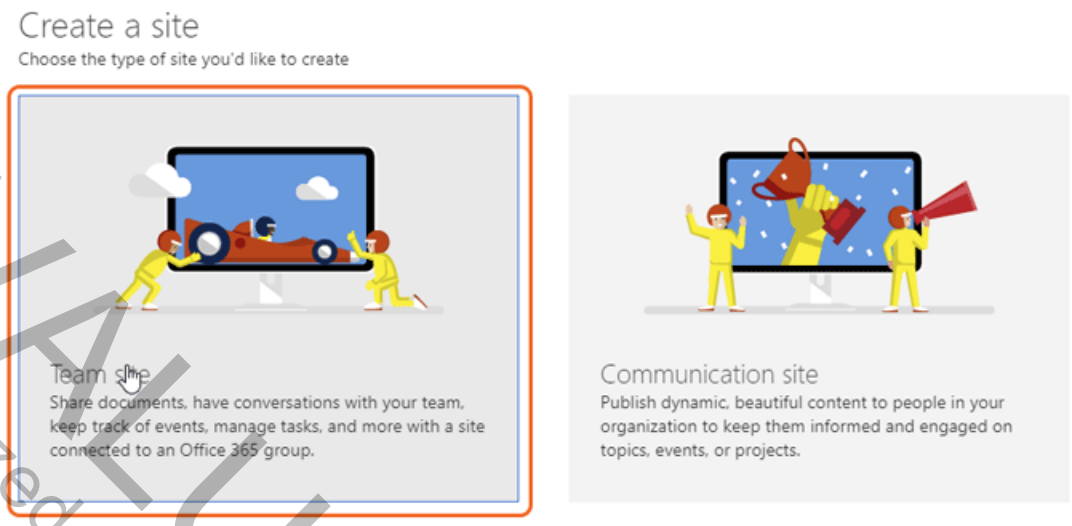
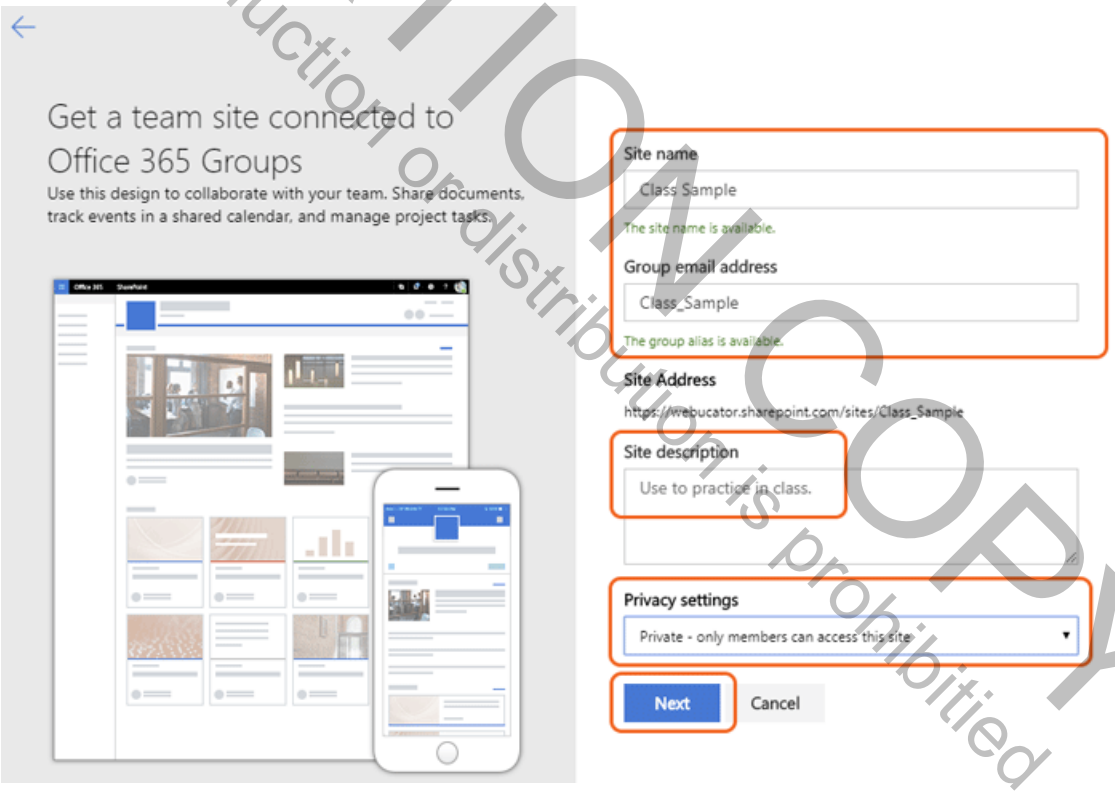
E. Click **Team Site**.



F. Type "Class Samples" as the Site name, "Class Sample" as the Group mail address, "Use to practice in class." as the Site Description. The rest of the settings are default. Click **Next**.



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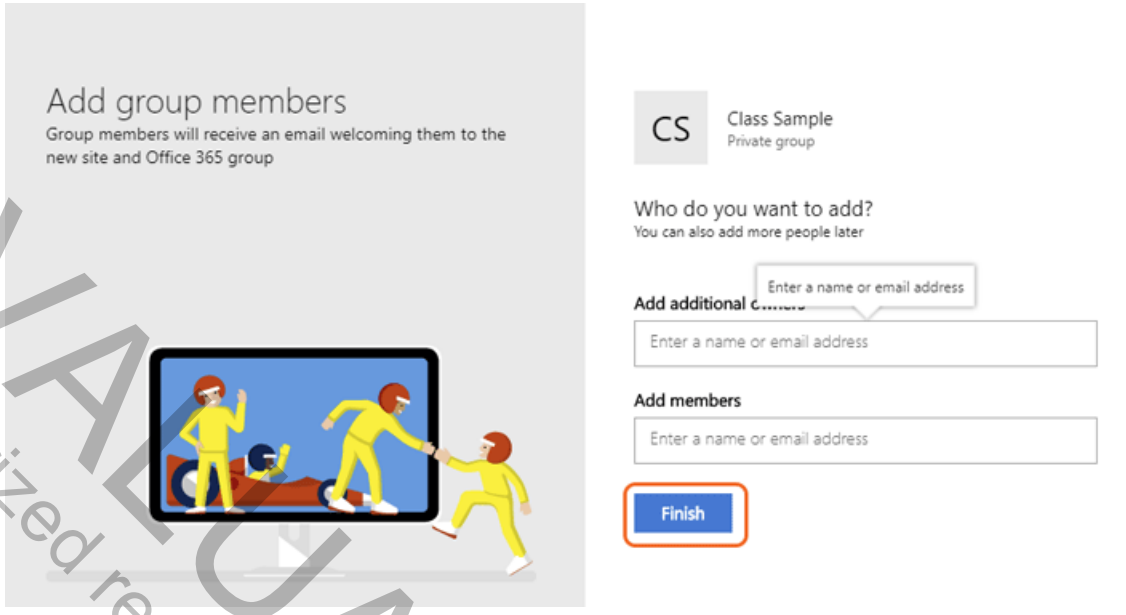
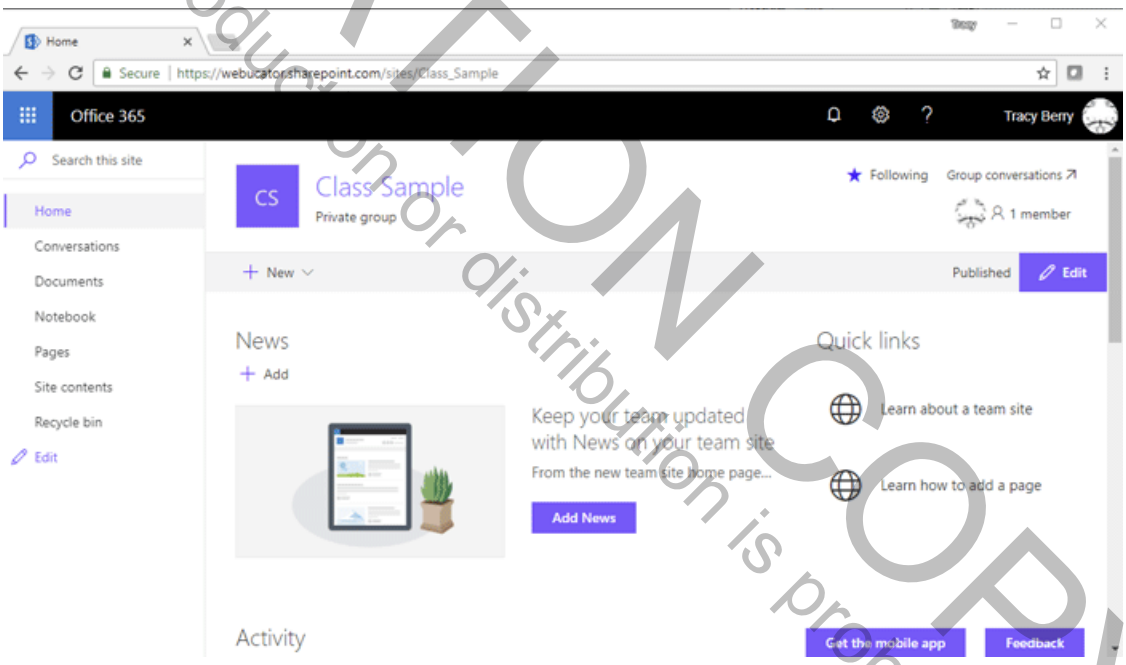
G. Leave the group members blank for now and click **Finish**.



H. The site is now ready for class.



If you encounter security issues, reach out to your site administrator.

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1.2 Conclusion

In this lesson, you have learned:

- How to set up the sample site for class.

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8. Site Columns and Content Types

In this lesson, you will learn...

1. About Site Columns.
2. About Content Types.
3. How to create Site Columns.
4. How to create Content Types.
5. How to create a document template for a Content Type.
6. How to assign a Content Type to a list or library.
7. How to create new items based on a custom Content Type.

One method of customizing SharePoint, in a way that can be reused throughout the site or site collection or even the whole farm, is to create Site Columns and Content Types. Site columns are the simplest element; they are essentially the same as list and library columns except that you create them at the site level and then they can be used throughout that site and any child site. Content Types are a combination of Site Columns as well as additional settings and information such as document templates and workflows. Content Types, once created, can then be linked to lists and libraries.

8.1 Site Column Gallery

Explore the Site Column Gallery

This walk-through will explore the columns available in the Site Column Gallery. Please note that based on your installation and security settings, you may not be able to try all of the features you see below.

1. Open a browser window if it is not already open and navigate to your **Class Sample** site.

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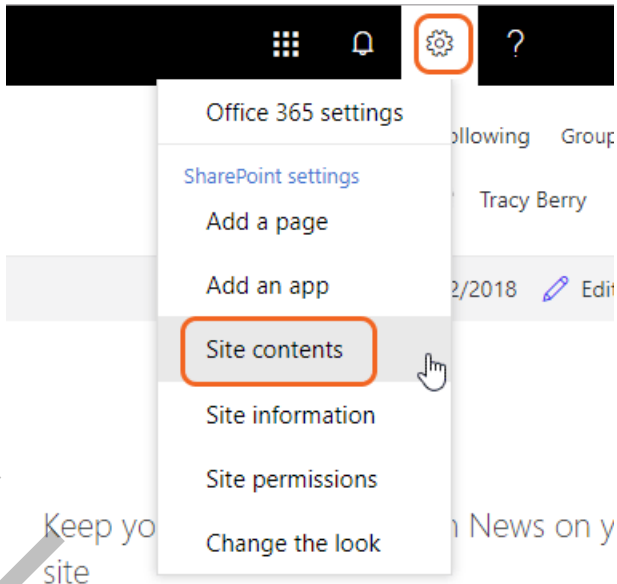
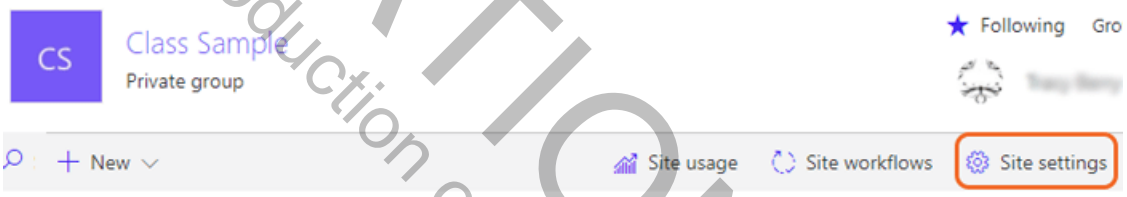
2. Click the **Settings** menu and select the **Site Contents** option from the list.



3. Click on **Site Settings**.



4. Click the **Site Columns** link in the **Web Designer Galleries** group on the **Site Settings** page.

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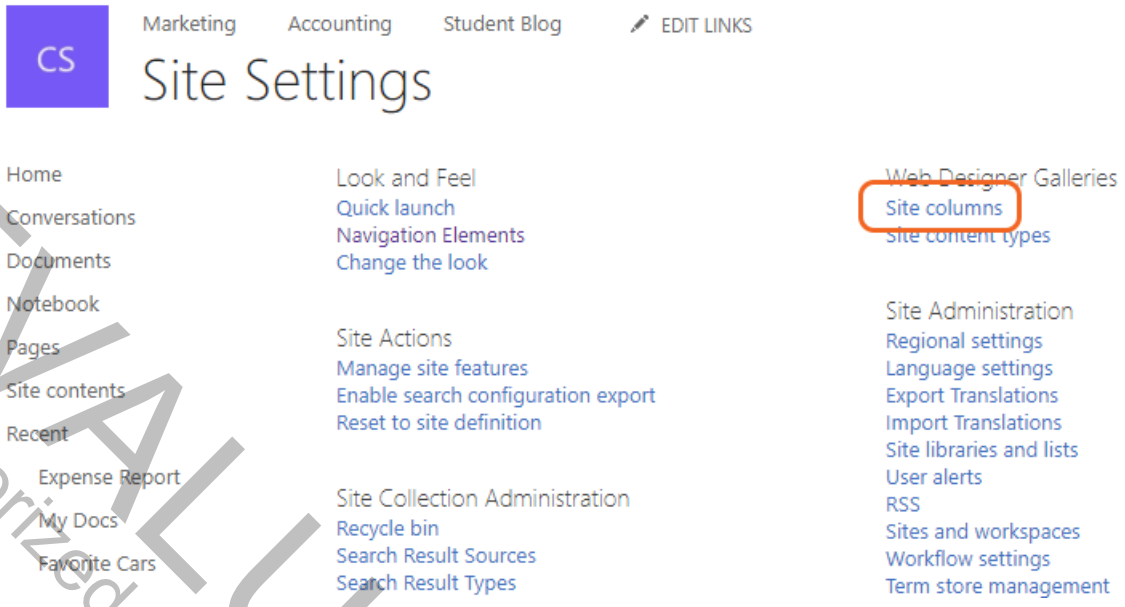
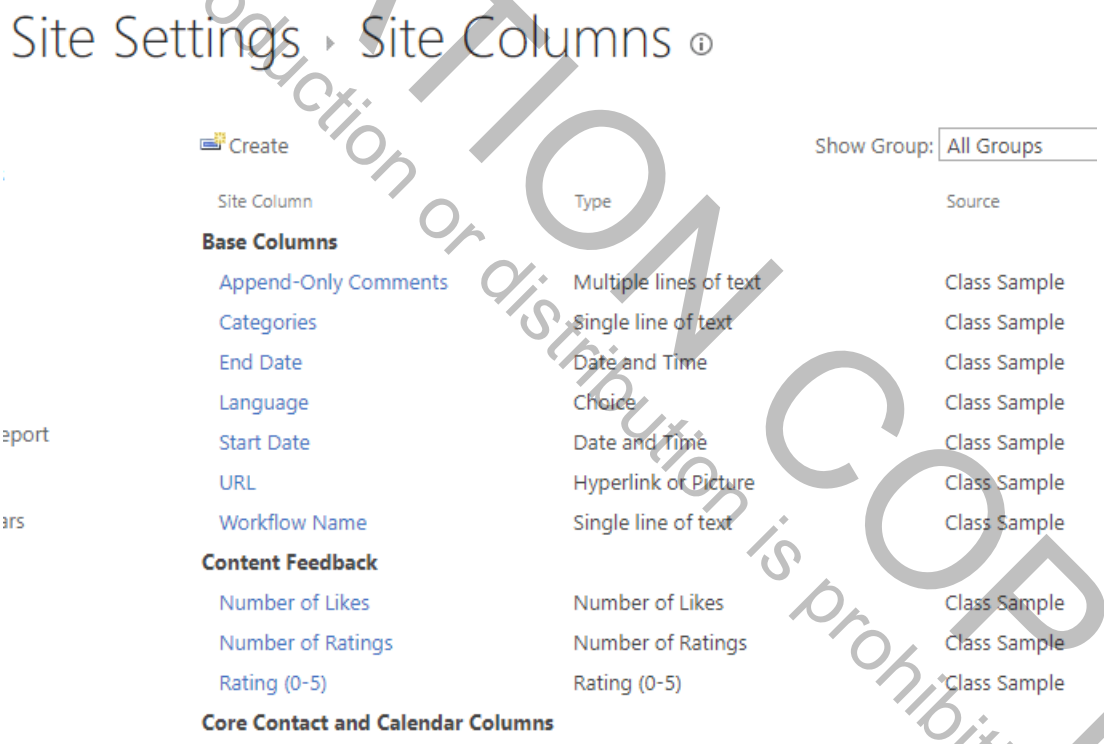


5. Take a few minutes to browse the list of **Site Columns** and their groupings. The image below is a partial list of **Site Columns**.



6. Leave the **Site Columns** gallery open for the next walk-through.

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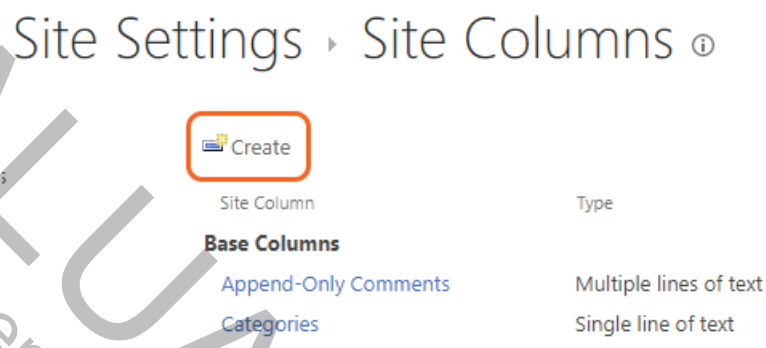
8.2 Creating Site Columns

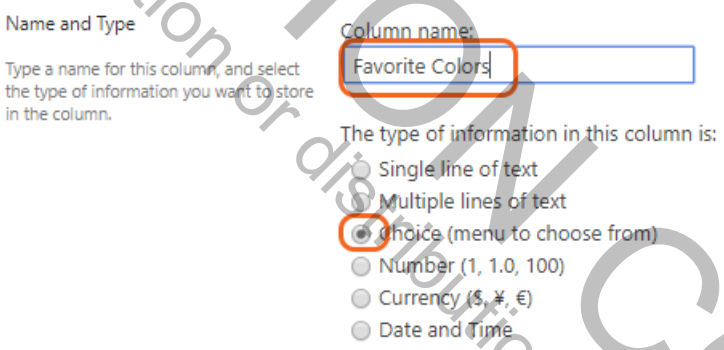
Create a Custom Site Column

In this walk-through, you will learn how to create a custom **Site Column**. Follow the steps in the previous walk-through to navigate to the **Site Column** gallery.

1. Click the **Create** link at the top of the **Site Column** gallery.



2. Enter `Favorite Colors` in the **Column name** field and select **Choice (menu to choose from)** from the **The type of information in this column is:** option field.



> Note that the column type choices are the same as for creating list or library columns. The main difference with Site Columns is that they can be reused on multiple lists and libraries throughout the site.

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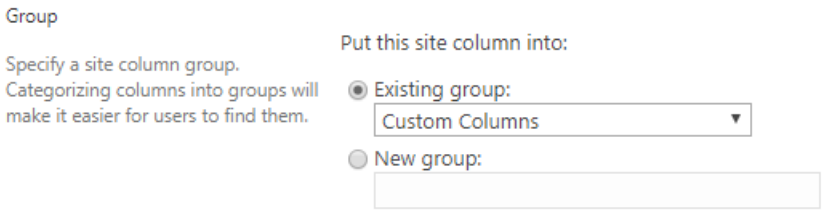
3. Note in the **Group** region you are leaving the default setting set to **Existing Group** and **Custom Columns**



4. Scroll down the **Site Column** page and enter some color values in the list box field labeled **Type each choice on a separate line**. Use the following image

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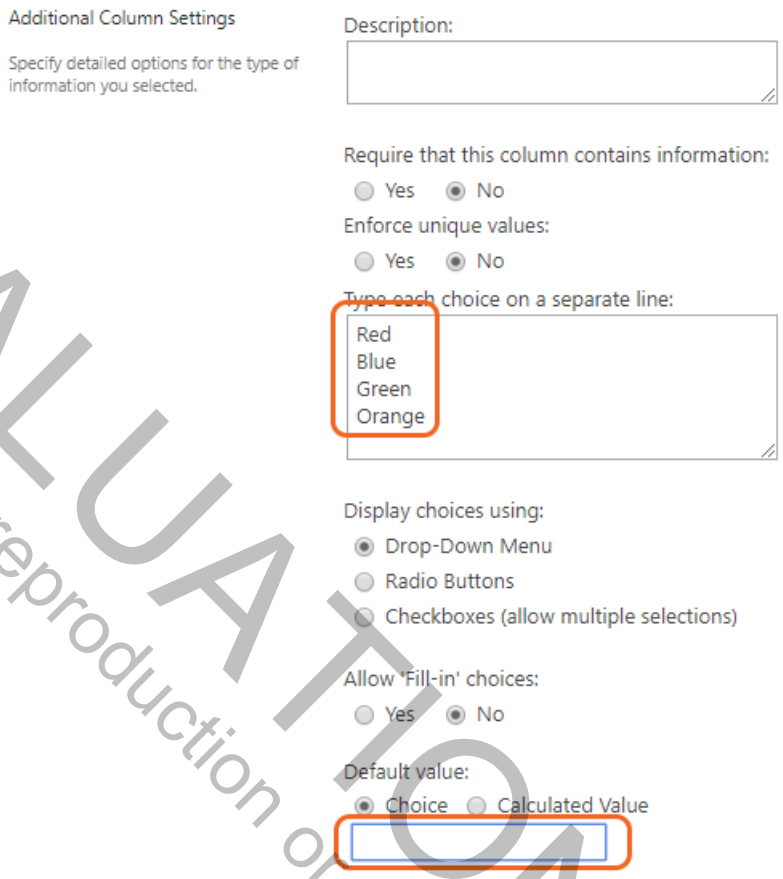
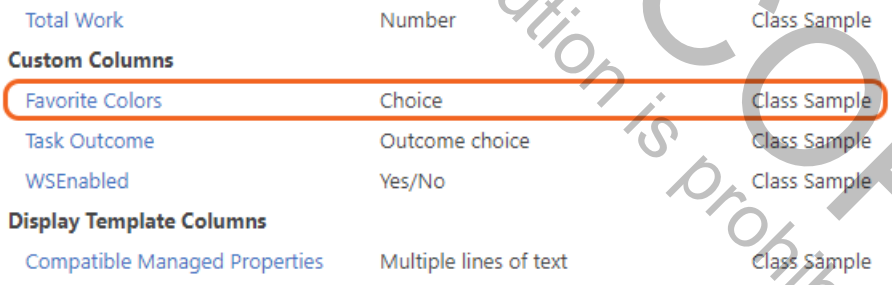
as a guide for what to enter. Note that you may remove **Red** from the Default area.



5. Click the **OK** button at the bottom of the form to save your work.
6. If you scroll down the list of **Site Columns**, you will find the new column **Favorite Colors** under the **Custom Columns** group.



Add a Site Column to a List

In this walk-through, you will learn how to add a Site Column to a SharePoint list.

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This walk-through will use the **Demo List** that was created in an earlier walk-through but any list or library would work.

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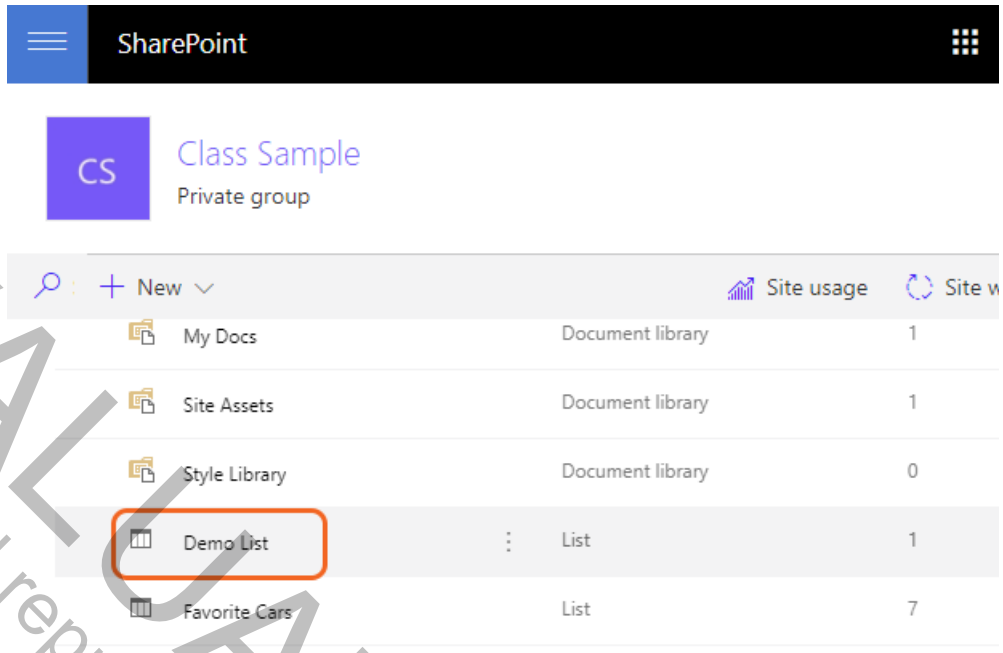
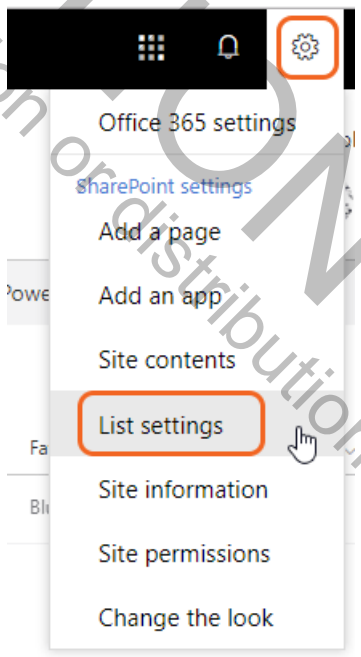
1. Click the **Demo List** link on the **Site Contents**.



2. Click the **Settings** to open **List Settings** button.



3. Scroll down the **List Settings** page and to the **Columns** region. The list already has a column named **Favorite Color**, but for the walk-through you want to

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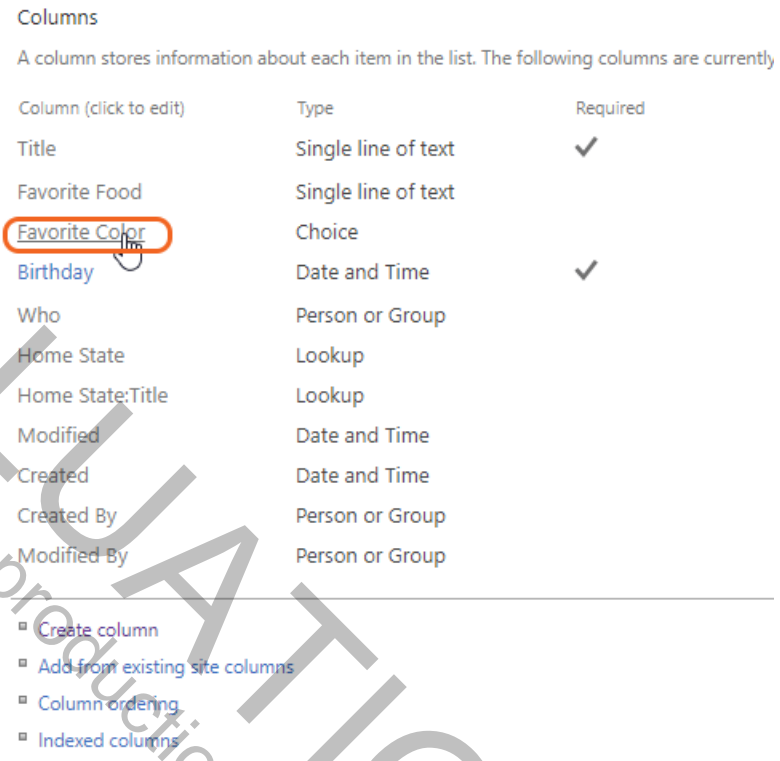
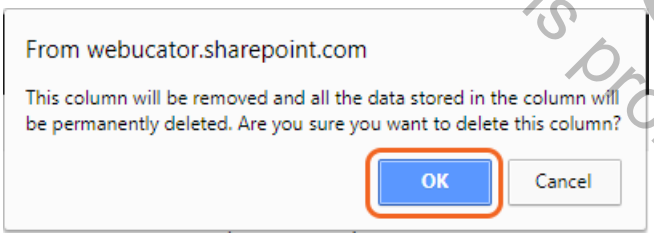
replace that with the Site Columns version. Click the current **Favorite Color** column link to open the **Change Column** page for the column.



4. Click the **Delete** button at the bottom of the **Change Column** page.

5. Click the **OK** button to confirm that you want to delete this column from the list.



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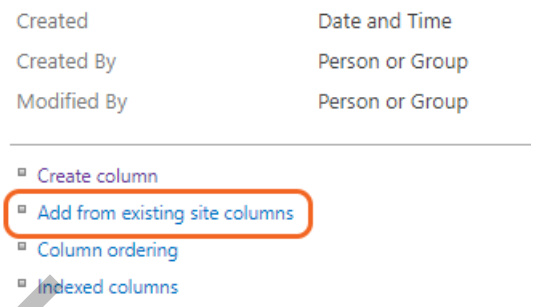
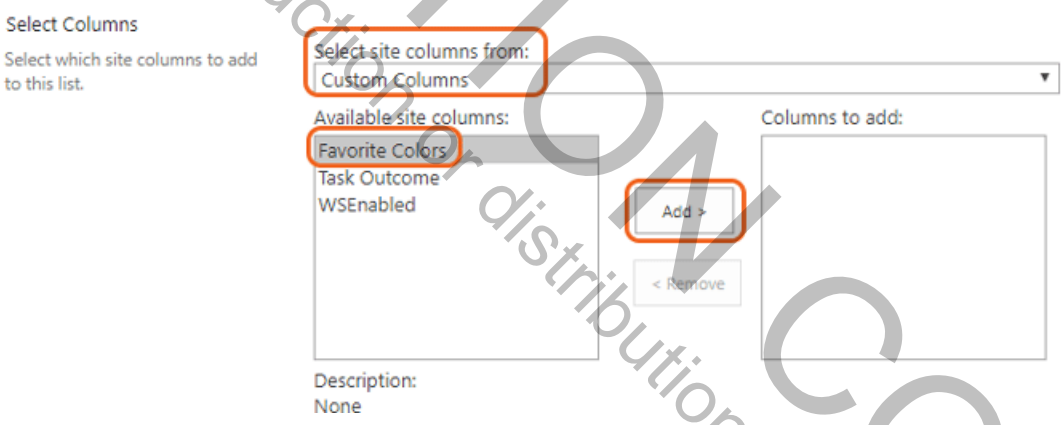
> Normally you would want to be very careful deleting a column from a list with data in it. Since this is just a test server and site, you should not be concerned about the potential loss of data.

6. Verify that the **Columns** list no longer shows the **Favorite Color** column and click the **Add from existing site columns** link under the list of columns.



7. In the **Add Columns from Site Columns** page, change the **Select site columns from** drop-down field to **Custom Columns**, and click the **Add** button to move the **Favorite Colors** column to the **Columns to add** list.



8. Click the **OK** button to save our change back to the list's columns.
9. Navigate back the items view of the **Demo List** by clicking the link in the **Quick Launch** menu or in the **breadcrumbs**.

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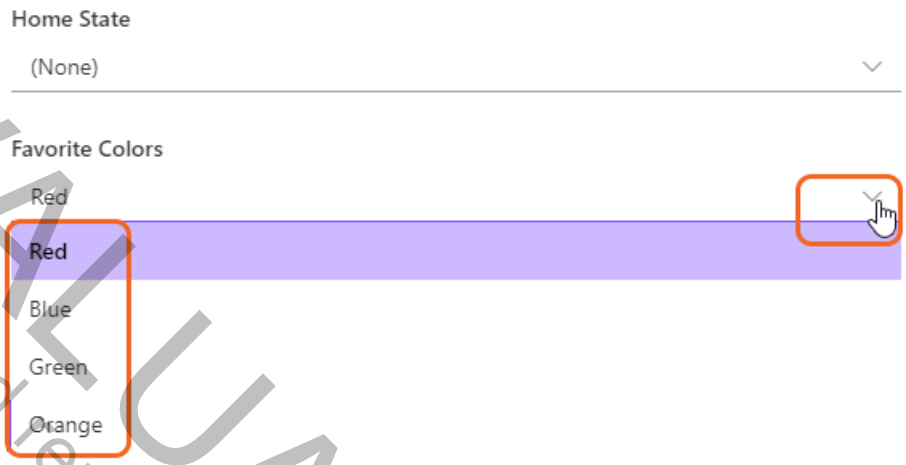
10. Click the **new item** link in the list to create a new item and test the Site Column.
11. Verify in the **Demo List - New Item** form that the **Favorite Colors** drop-down list has the colors that you defined in the Site Column. Click the **Cancel** button to close the form without saving.



8.3 Site Content Type Gallery

Explore the Site Content Types Gallery

This walk-through will explore the content types available in the Site Content Types Gallery.

1. Open our browser if it is not already open and navigate to your Class Sample team site.

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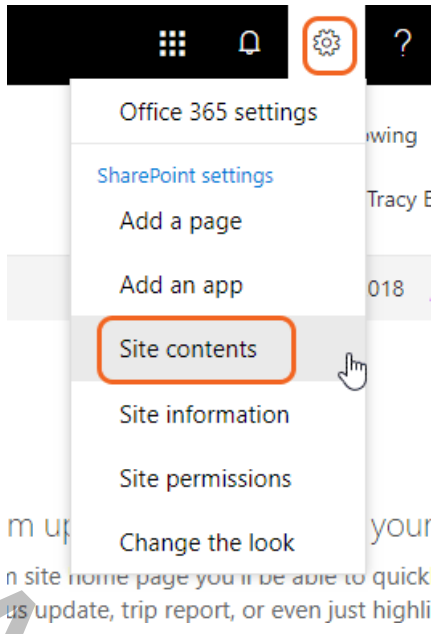
2. Click the **Settings** menu and select the **Site Contents** option from the list.



3. Click the **Site Settings** link.

4. Click the **Site content types** link in the **Web Designer Galleries** group on the **Site Settings** page.

5. Take a few minutes to browse the list of **Site Content Types** and their groupings. The image below is a partial list of **Site Content Types**.

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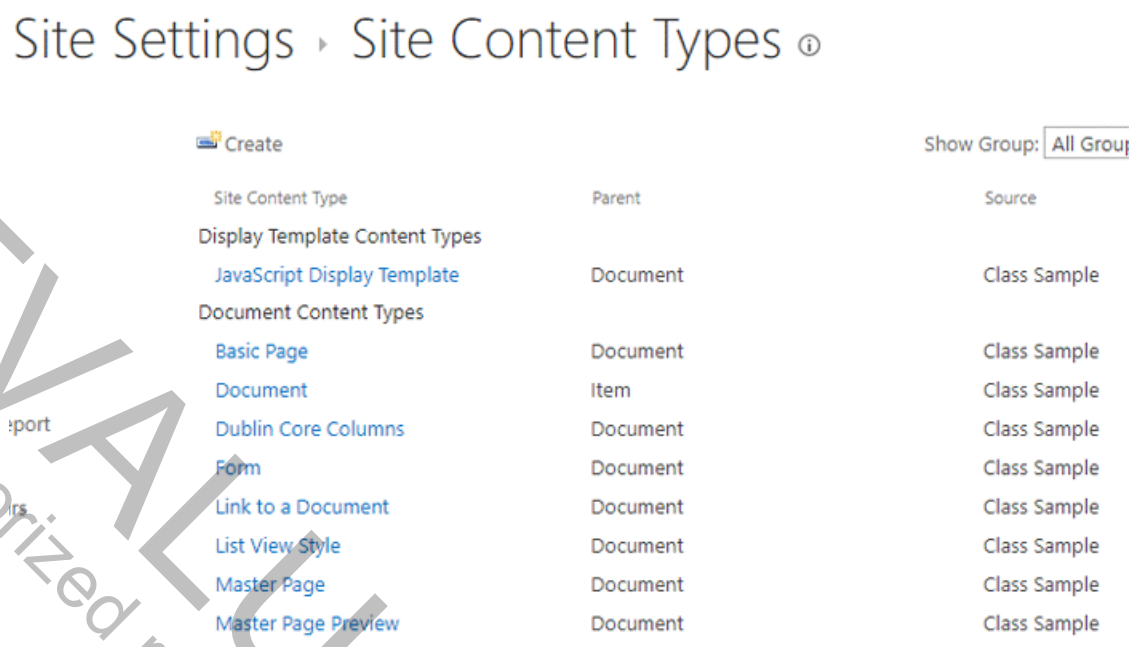

6. Leave the **Site Content Types** gallery open for the next walk-through.

8.4 Creating Content Types

How to Create and Use Content Types

In this walk-through, you will learn to create a custom content type and apply it to a new document library.

1. Follow the previous demonstration to navigate to the Site content types gallery.

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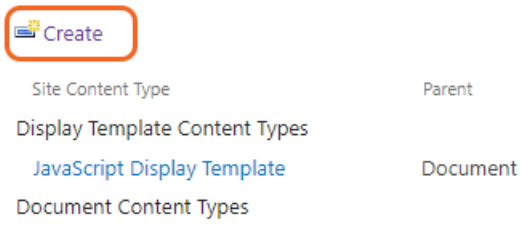
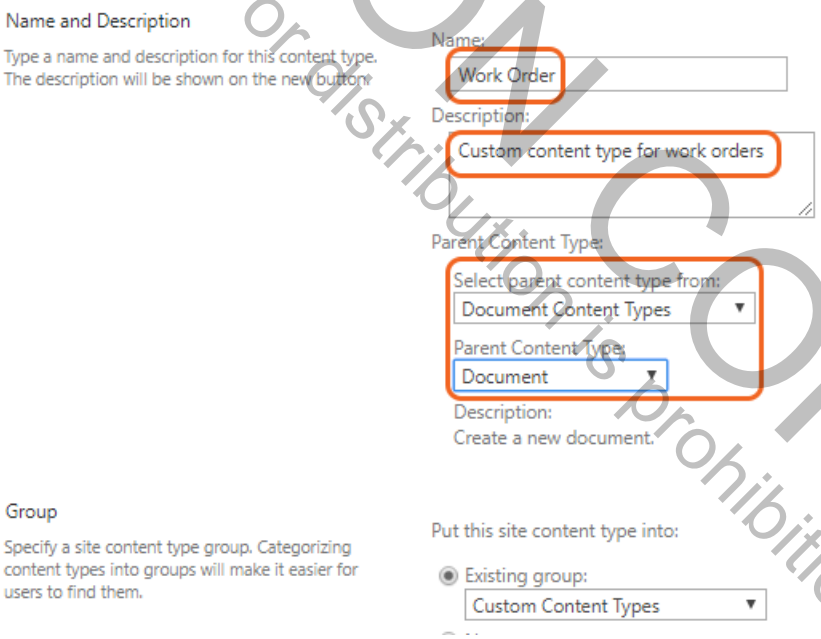
2. Create a new content type in the **Sample Class Site** that extents the **Document** content type.
   A. From within the **Site Content Types** gallery page, click the **Create** link at the top left of the page.



   B. In the **New Site Content** form, use the following information to complete the form.

Field	Data
Name:	Type "Work Order"
Description:	Type "Contoso custom content type for work orders"
Select parent content type from:	Select **Document Content Types**
Parent Content Type:	Select **Document**

The completed form should look similar to the following image.



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C. Click the **OK** button to complete the new content type creation process.

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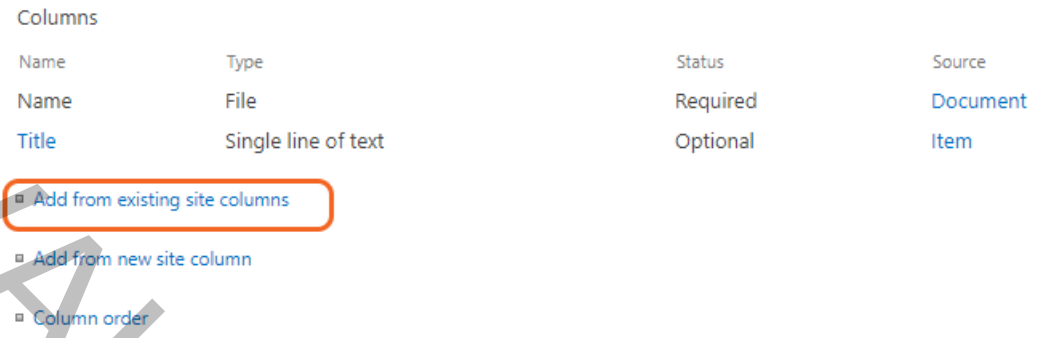
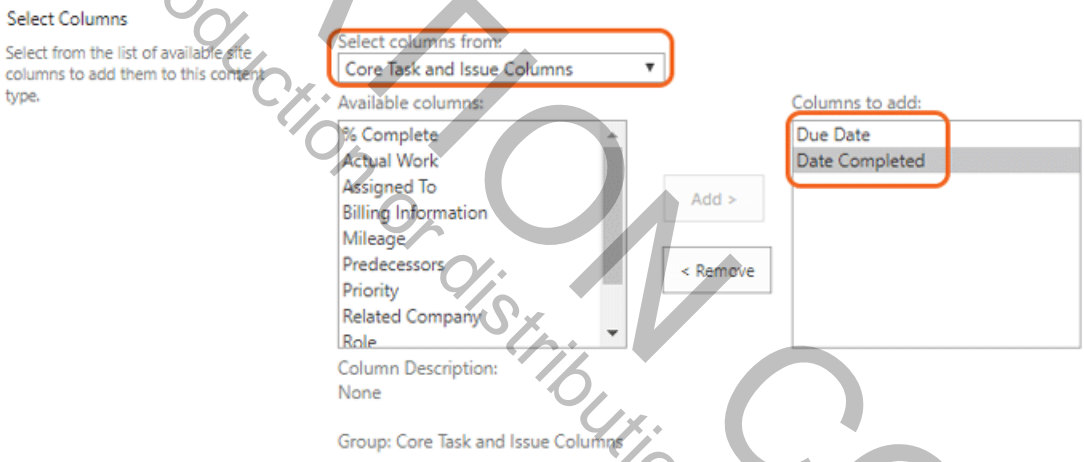
3. Add columns to the new **Work Order** content type.
   A. Click the **Add from existing site columns** link below the **Columns** region on the **Site Content Type Information** page.



   B. In the **Add Columns to Content Type** form, select **Core Task and Issue Columns** in the **Select columns from** drop-down box. From the **Available columns** list box, choose both **Due Date** and **Date Completed**, and then click the **Add** button to add them to the **Columns to add** list box.



   C. Click the **OK** button to complete adding the site columns to the **Work Order** content type.

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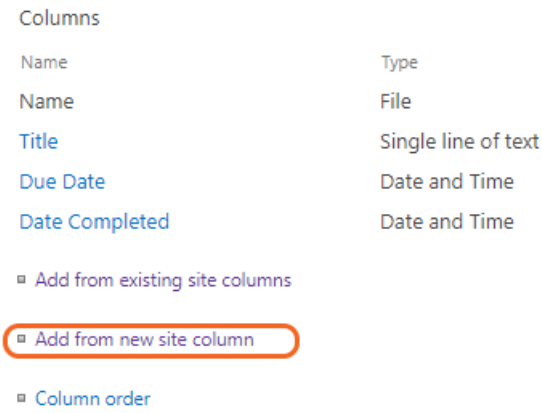
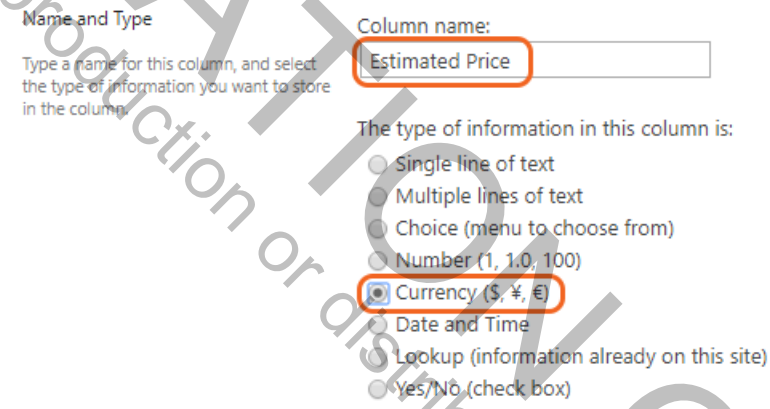
D. Click the **Add from new site column** link below the **Columns** region on the **Site Content Type Information** page.



E. On the **New Site Column** form, enter `Estimated Price` in the **Column Name** field. Note the **Additional Column Settings** available to the **Currency** column type but leave everything at their default settings.



F. Click the **OK** button to save your changes and complete the creation of the new site column.

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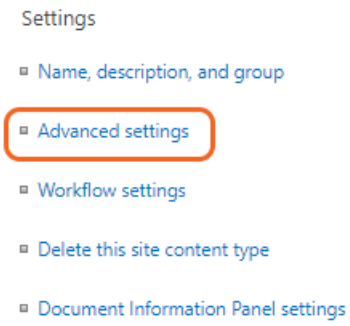
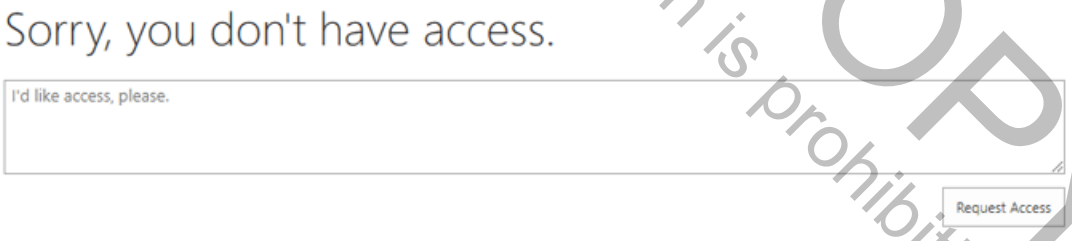
4. Assign a document template to the new **Work Order** content type.
   A. Click the **Advanced settings** link under the **Settings** region on the **Work Order** content type information page.



   B. Click the **Upload a new document template** option on the **Advanced Settings** page and then click the **Choose File** button to find the file.

   C. Navigate to the folder you downloaded the class files to and select the Work_Order.docx file. You may also choose a file of yours to use. Click the **Open** button to complete the file selection. NOTE: If you do not have security permissions you may skip this step, again Please note that based on your installation and security settings, you may not be able to try all of the features you see in this guide.



   D. Click the **OK** button on the **Advanced Settings** page to save your changes to the **Work Order** content type.

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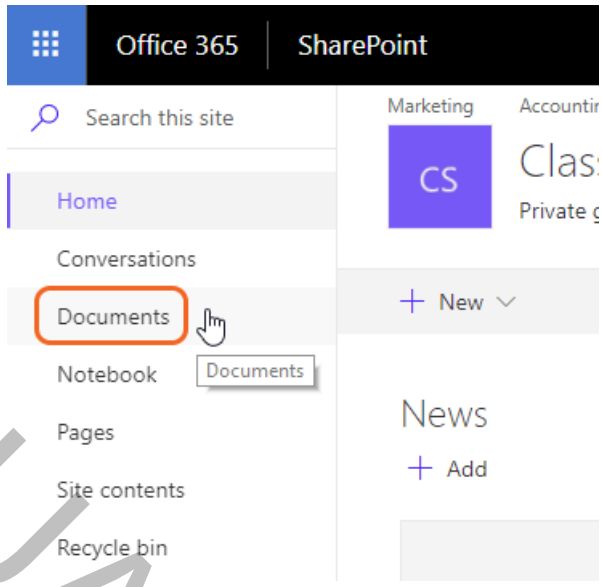
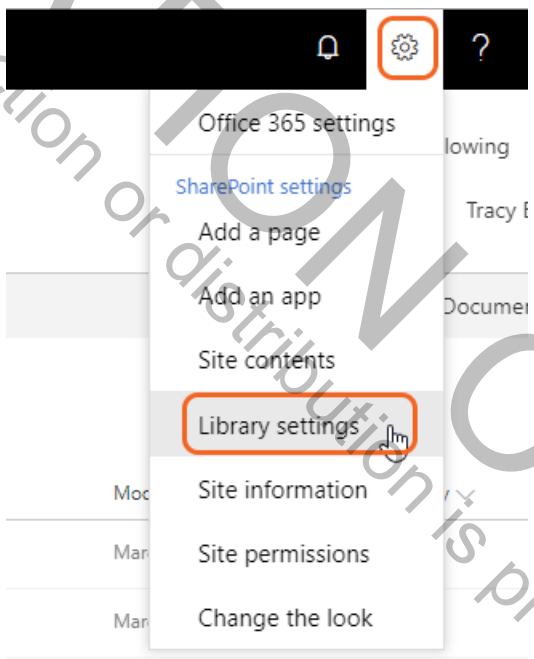
5. Add the **Work Order** content type to the **Documents** document library.
   A. Click on the new **Documents** document library.



   B. Click the **Library Settings** on the **Settings**.



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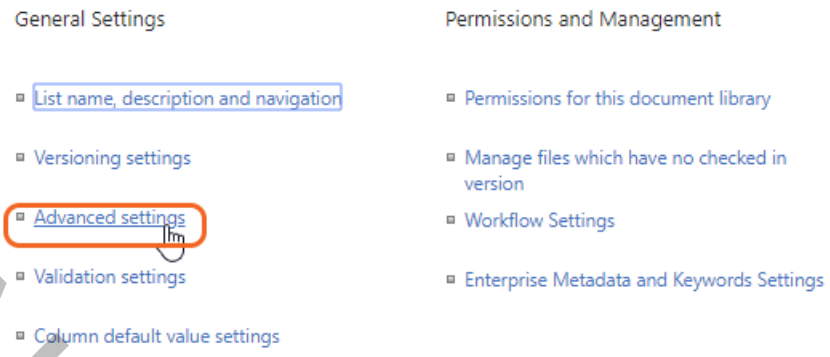
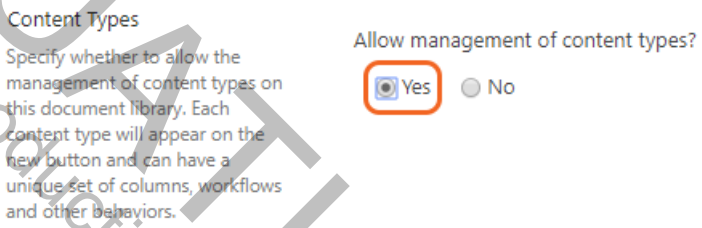
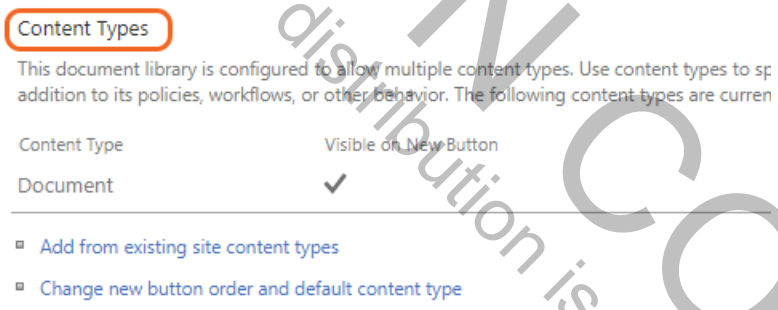
C. Click the **Advanced Settings** link on the **Document Library Settings** page in the **General Settings** region.



D. Click the **Yes** option under the label **Allow management of content types?** and then click the **OK** button at the bottom of the page to save the change.



E. You should now see a **Content Types** region that was not being displayed before you made the change in the previous step.



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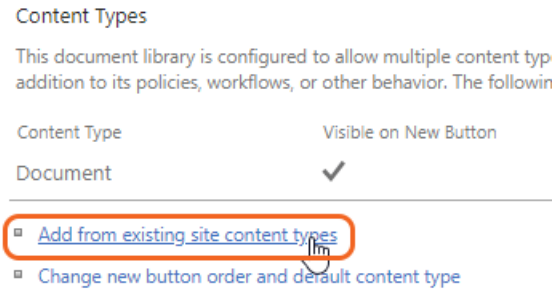
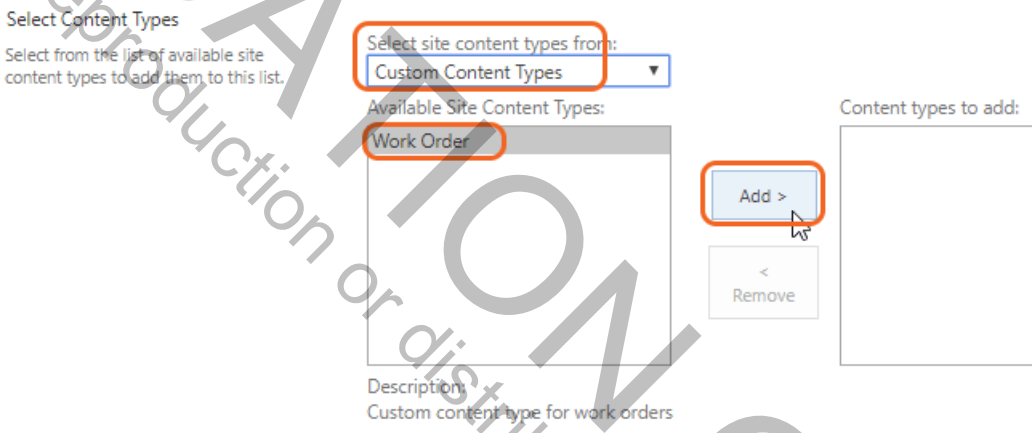
F. Click the **Add from existing site content types** link at the bottom of the **Content Types** region.



G. In the **Add Content Types** form, select **Custom Content Type** in the drop-down box labeled **Select site content types from**. Select **Work Orders** in the list box labeled **Available Site Content Types** and click the **Add** button to move it to the list box labeled **Content types to add**. Click the **OK** button to save your changes.



6. Add a new document to the **Document** library based on the **Work Order** content type.

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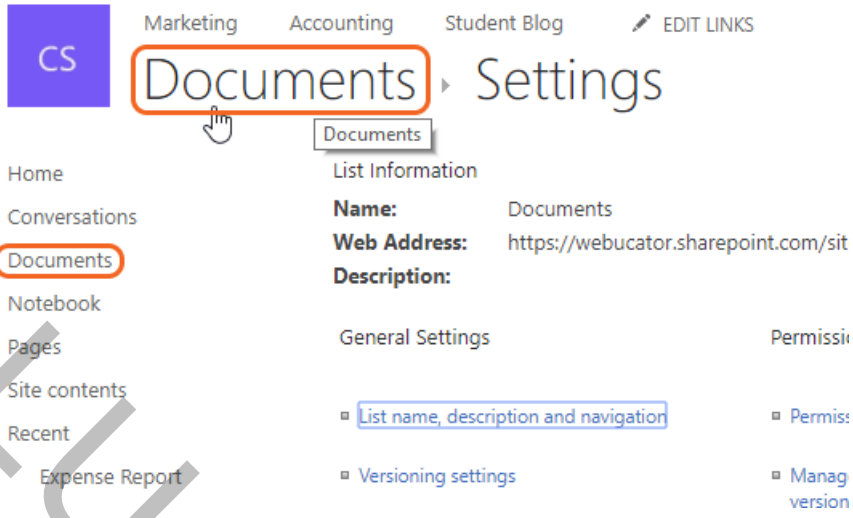
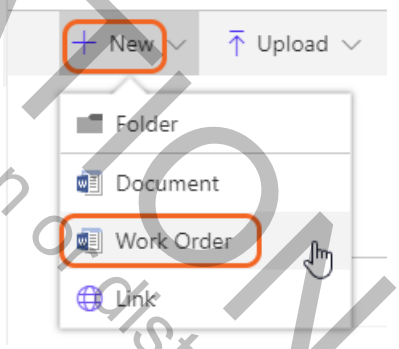
A. Click the **Document** link in either the **Quick Launch** menu or the Site's **Breadcrumbs** to take you to the **Browse** view of the **Documents** library.



B. Click the **New** to open the list and choose the **Work Orders** option.



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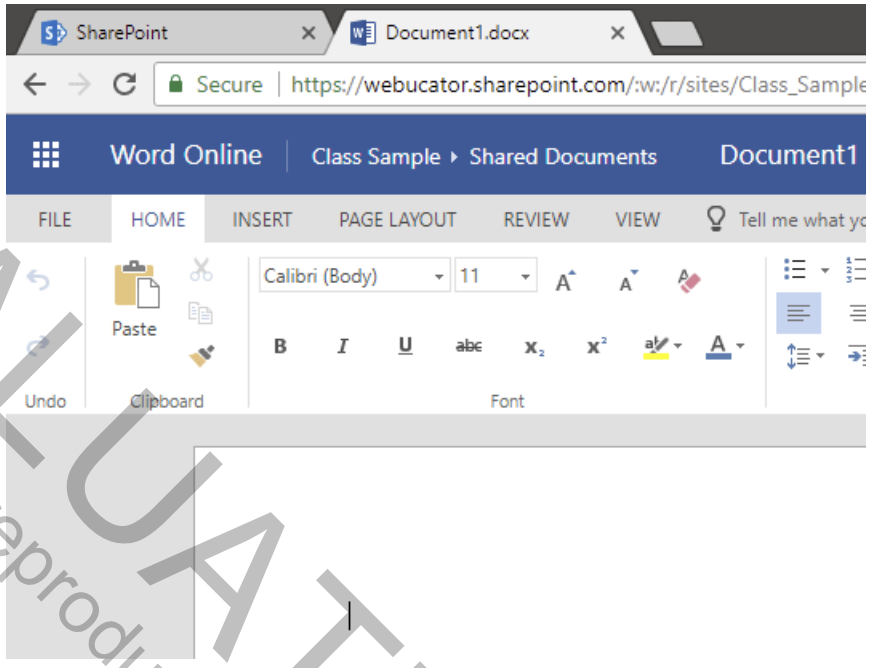
C. **Microsoft Word Online** will open a new document based on the template we loaded into the **Work Orders** content type. NOTE: If you were unable to upload a template due to permissions, your page will be blank.



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Exercise 12 Creating and Working with Content Types

10 to 15 minutes

In this exercise, you will learn to create Content Types and Site Columns. Additionally you will learn how to associate a document template with a content type based on the **Document** parent content type.

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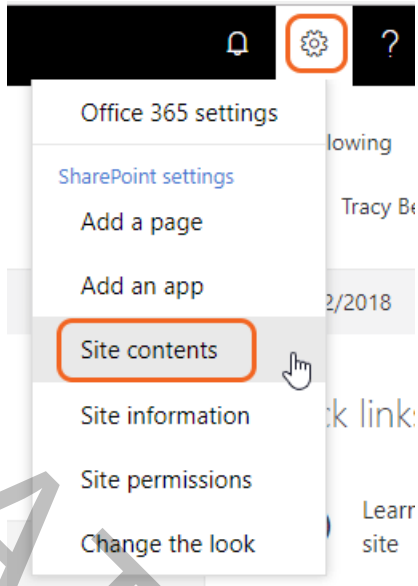
1. Create a new Content Type for the Sample Class Site.
   A. Open your browser if it is not already open and navigate to your root team site.
   B. Click the **Settings** menu and select the **Site Contents** link.



   C. Click **Site Settings**.

   D. Click the **Site content types** link within the **Web Designer Galleries** group.

   E. Take a moment to read through the list of default content types. Note how they are grouped and there is a parent column that lists the parent content type of each individual content type.

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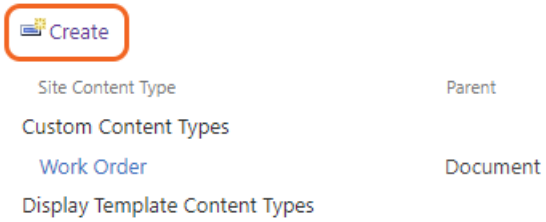
F. Click the **Create** link at the top of the list of content types.



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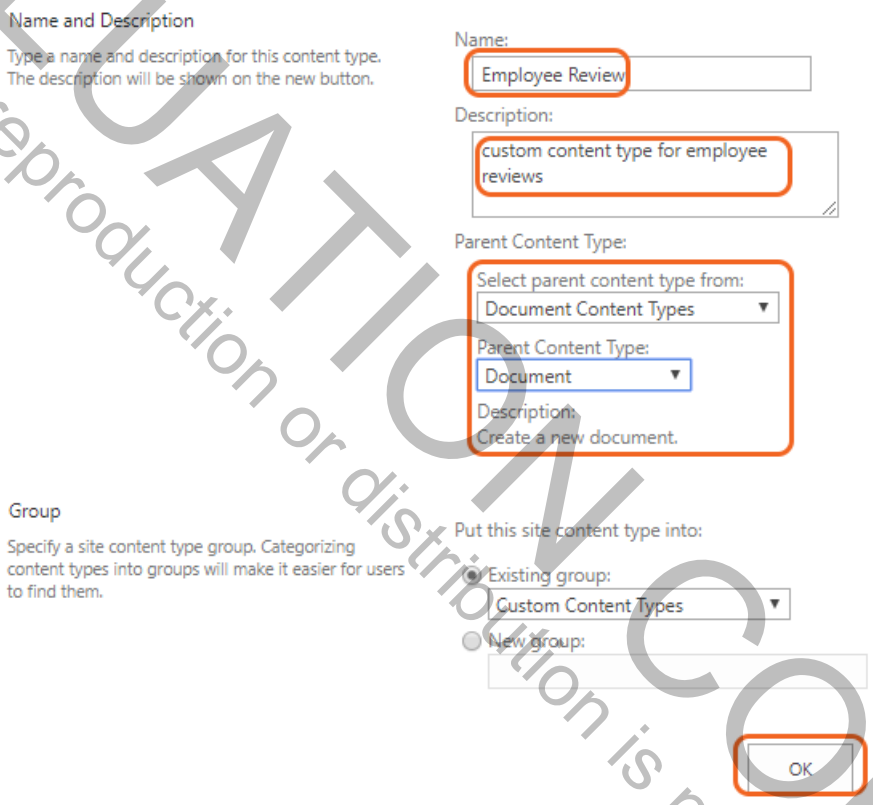
G. In the **New Site Content** form, use the following information to complete the form.

Field	Data
Name:	Type "Employee Reviews"
Description:	Type "custom content type for employee reviews"
Select parent content type from:	Select **Document Content Types**
Parent Content Type:	Select **Document**
Choose group:	Type "Custom Content Types"

The completed form should look similar to the following image. Click the **OK** button to complete the new content type creation process.



2. Add columns to the new **Employee Reviews** content type.

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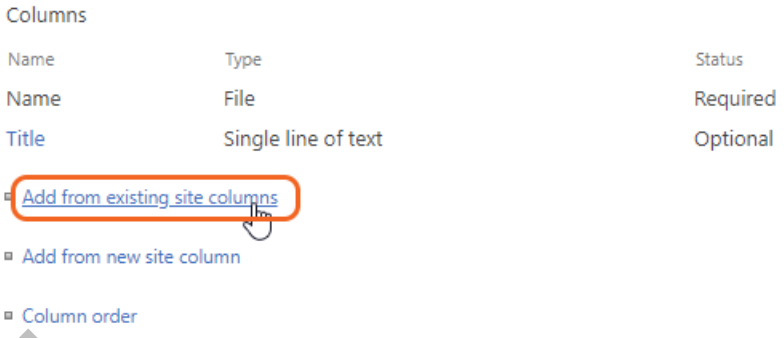
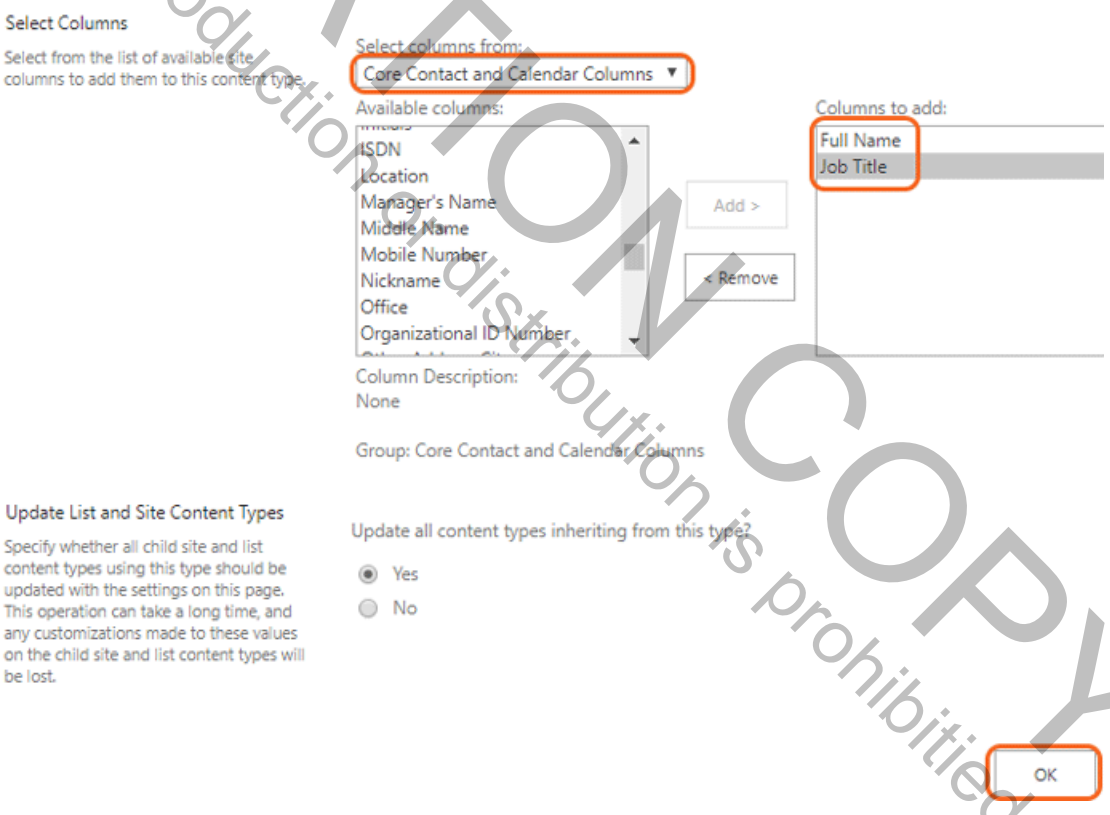
A. Click the **Add from existing site columns** link below the **Columns** region on the **Site Content Type Information** page.



B. In the **Add Columns to Content Type** form, select **Core Contact and Calendar Columns** in the **Select columns from** drop-down box. From the **Available columns** list box, choose both **Full Name** and **Job Title** then click the **Add** button to add them to the **Columns to add** list box. Click the **OK** button to complete adding the site columns to the **Employee Reviews** content type.



3. Assign a document template to the new **Employee Reviews** content type.

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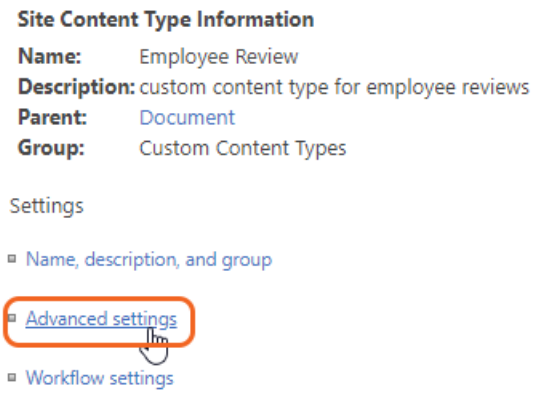
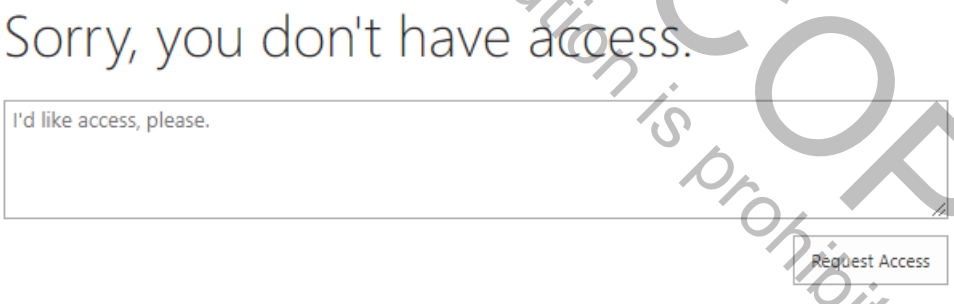
A. Click the **Advanced settings** link under the **Settings** region on the **Employee Reviews** content type information page.



B. Click the **Upload a new document template** option on the **Advanced Settings** page and then click the **Choose File** button to find the file.

C. Navigate to the folder you downloaded the class files to and select the Emp_Review.docx file. You may also choose a file on your computer instead. Click the **Open** button to complete the file selection.

D. Click the **OK** button on the **Advanced Settings** page to save your changes to the **Employee Reviews** content type. NOTE: You may receive an error due to permissions and you may skip this step of adding a template.



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Exercise 13 Adding a Content Type to a Library

10 to 15 minutes

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

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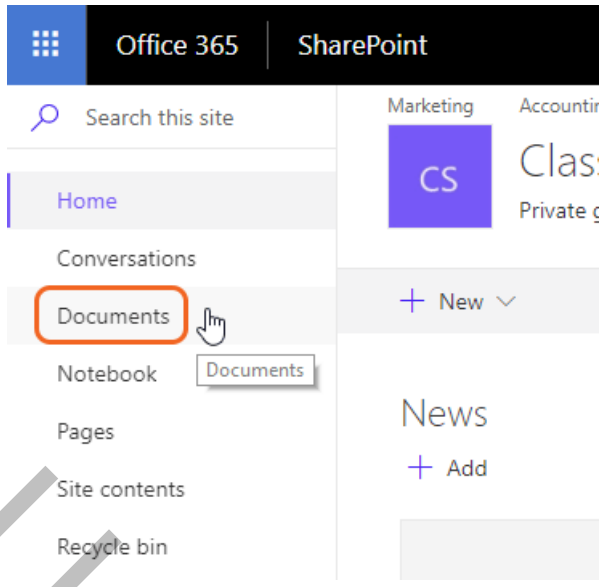
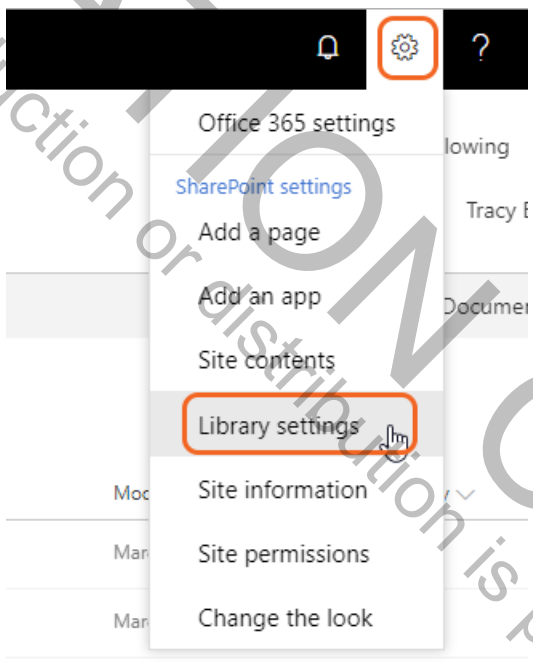
1. Click on the new **Documents** document library.



2. Click the **Library Settings** on the **Settings** .



3. Click the **Advanced Settings** link on the **Document Library Settings** page in the **General Settings** region. NOTE: This step may not be needed if you had previously performed this task. Skip to step 6.

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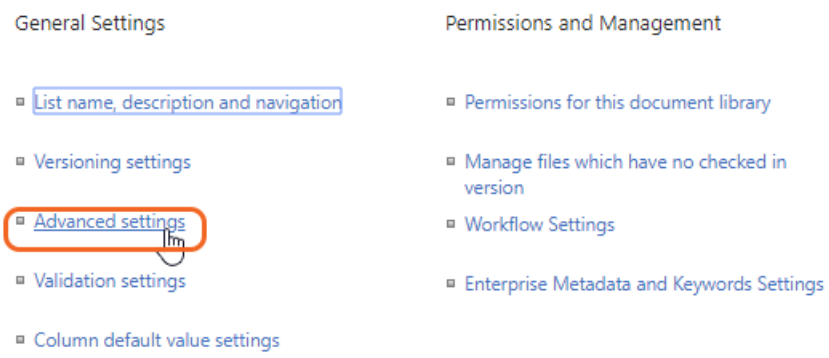
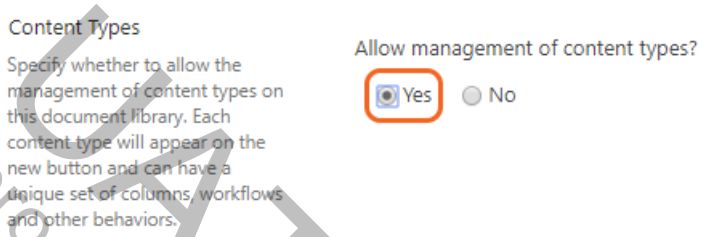
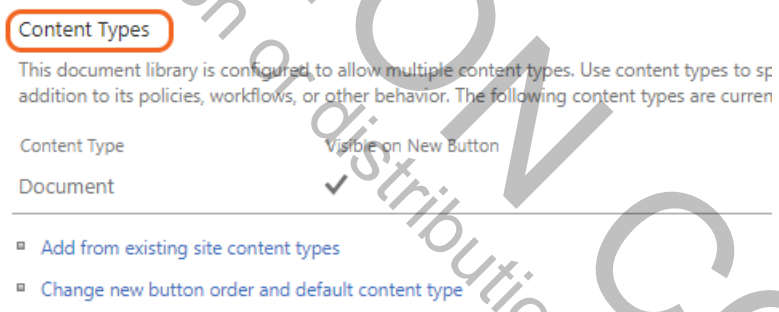


4. Click the **Yes** option under the label **Allow management of content types?** and then click the **OK** button at the bottom of the page to save the change.



5. You should now see a **Content Types** region that was not being displayed before you made the change in the previous step.



6. Click the **Add from existing site content types** link at the bottom of the **Content Types** region.

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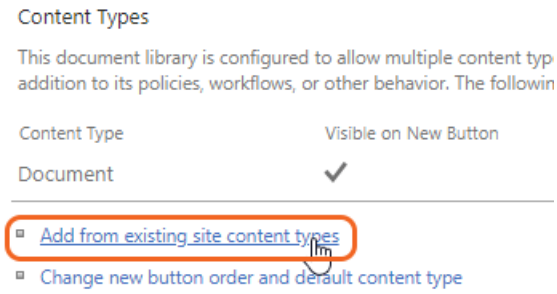

7. In the **Add Content Types** form, select **Custom Content Type** in the drop-down box labeled **Select site content types from**. Select **Employee Review** in the list box labeled **Available Site Content Types** and click the

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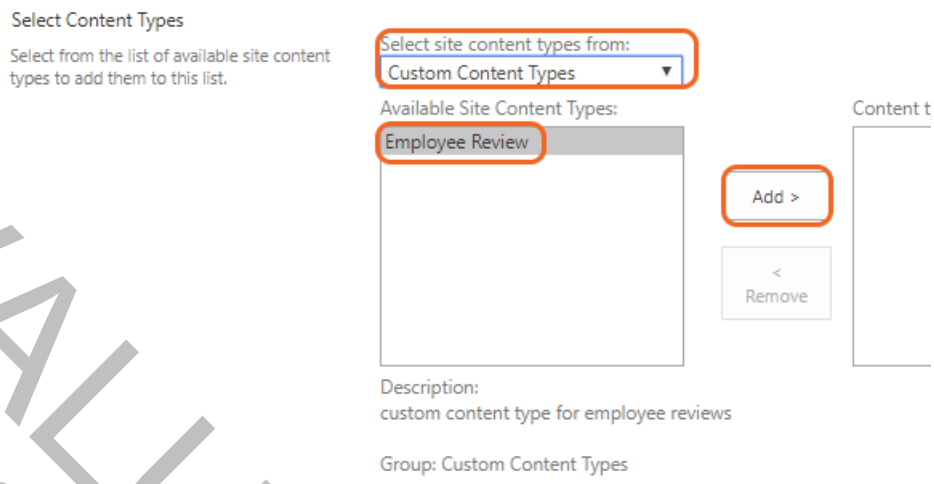
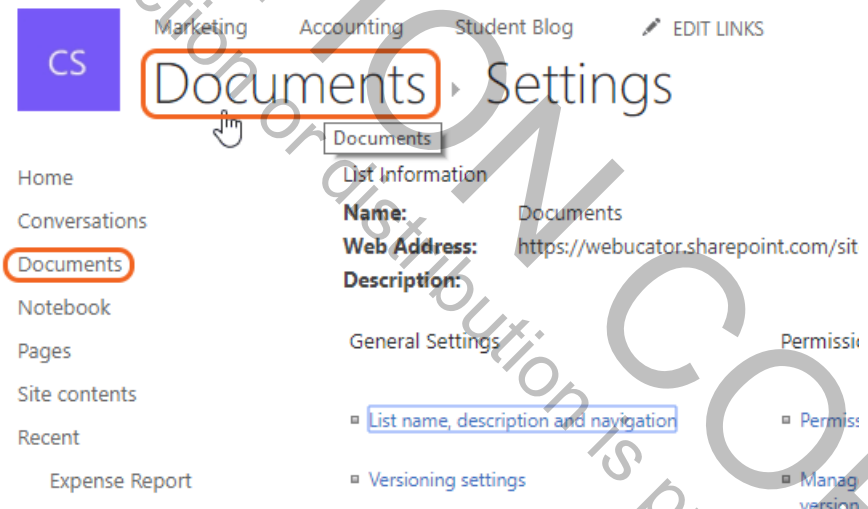
Add button to move it to the list box labeled **Content types to add**. Click the **OK** button to save your changes.



8. Add a new document to the **Document** library based on the **Employee Review** content type.
   A. Click the **Document** link in either the **Quick Launch** menu or the Site's **Breadcrumbs** to take you to the **Browse** view of the **Documents** library.



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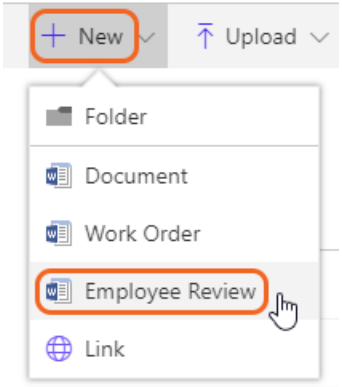
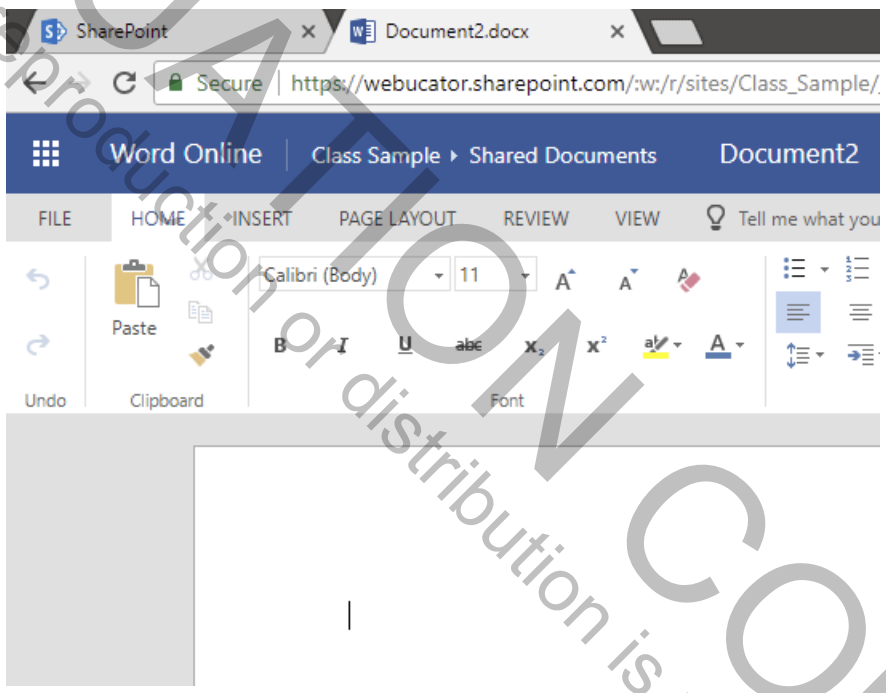
B. Click the **New** to open the list and choose the **Work Orders** option.



C. **Microsoft Word Online** will open a new document based on the template we loaded into the **Employee Reviews** content type. NOTE: If you were unable to upload a template due to permissions, your page will be blank.



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8.5 Conclusion

In this lesson, you have learned:

- About Site Columns.
- About Content Types.
- How to create Site Columns.
- How to create Content Types.
- How to create a document template for a Content Type.
- How to assign a Content Type to a list or library.
- How to create new items based on a custom Content Type.

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