

SharePoint Training – Administrators

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Contents

SharePoint Training – Administrators.....	1
Exercise 1 – Setting up your SharePoint Site	3
A. Access your site	3
B. Edit your site’s homepage	4
Exercise 2 – Creating and Customising a Document Library	8
A. Create the Document Library	8
B. Add a document.....	10
C. Customise the columns	12
D. Update the Document Code for your document	14
E. Change the Default View	16
F. Create an alert on the library.....	18
Exercise 3 – Creating a Calendar.....	20
A. Create the Calendar	20
B. Customise the Category column	23
C. Add Events to the Calendar	26
Exercise 4 – Creating a Task List.....	27
A. Create the Task List.....	27
B. Set the Task List to Notify Task Owners	30
C. Customise the Columns	32
D. Add a Task to the Task List	34
E. Add Tasks to the Timeline	35
Exercise 5 - Updating the SharePoint Site Homepage.....	36

A.	Return to your homepage and Start Editing Mode.....	36
B.	Add your Document Library	37
C.	Add your calendar	38
D.	Add your task list	40
E.	Rearrange the Web Parts and view your page	41
F.	Tidy up the page by removing unused web parts.....	43
G.	Remove unused Items from the left menu	44
Exercise 6 – Setting Permissions		46
A.	Access Site Permissions	46
B.	Set permissions on your document library	48
Exercise 7 – Creating a Sub-site.....		52

Training Evaluation Form:

<https://www.aber.ac.uk/en/is/it-services/web/training-evaluation/>

Exercise 1 – Setting up your SharePoint Site

Before setting up your site you should consider its purpose and how it will be used. You will edit the site homepage to provide information about the site.

A. Access your site

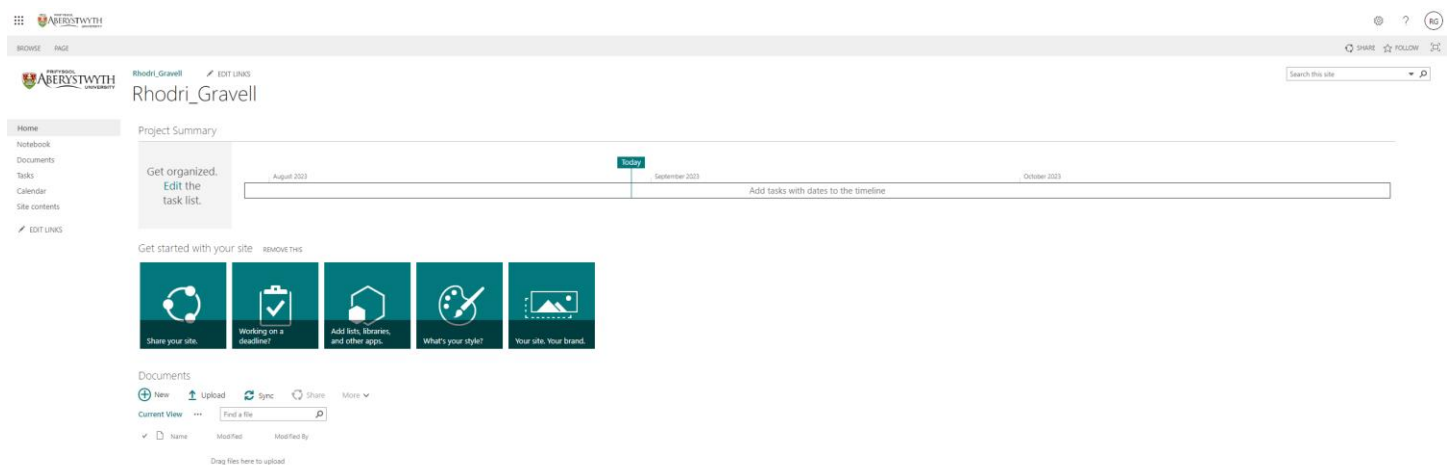
1. Open SharePoint by opening a browser and typing `sharepoint.aber.ac.uk` into the address bar.

2. Log in.

3. Navigate to your training site:

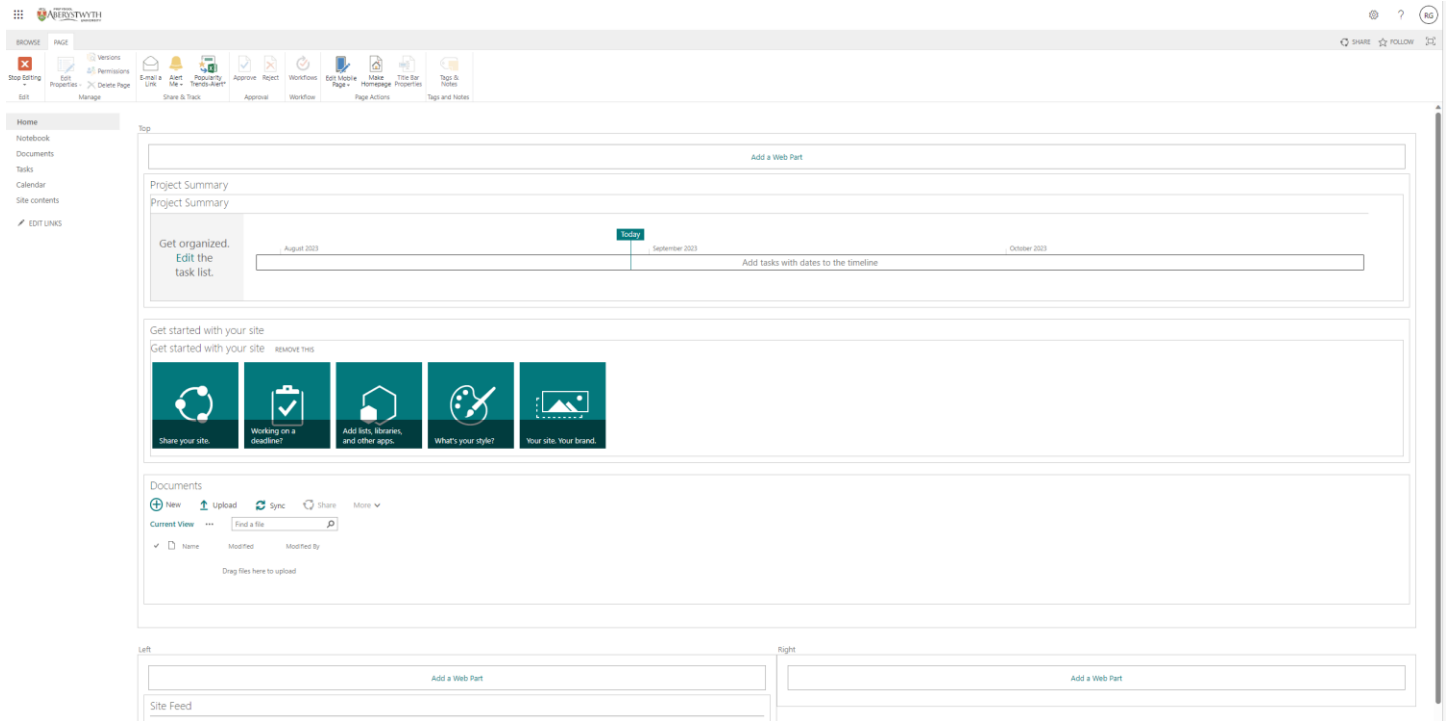
- Click on 'SharePoint Help' in the left menu
- Click on 'Training Area' under Sites in the left menu of the new page
- Click on 'Site Contents' in the left menu of the new page
- Look under 'Subsites' in the main area of the new page
- Scroll down and click on the appropriate Training Site, e.g. 'Suzy Shipman'.

4. You will see a freshly made SharePoint site:

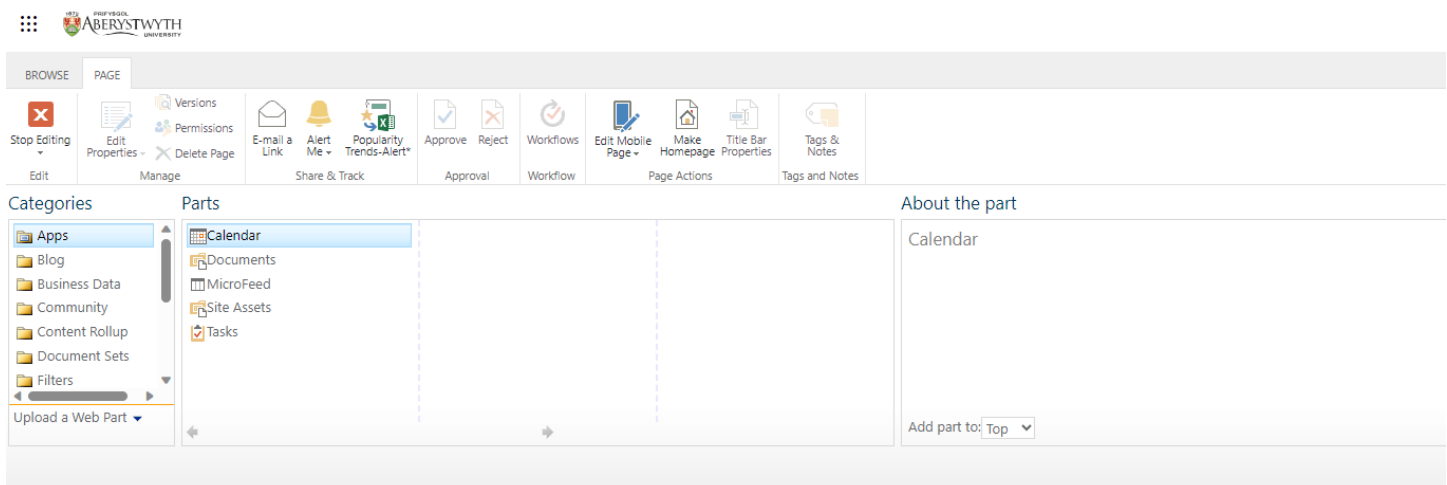


B. Edit your site's homepage

1. Click on Page at the top left of the screen and select 'Edit Page'. The page editing screen will appear:



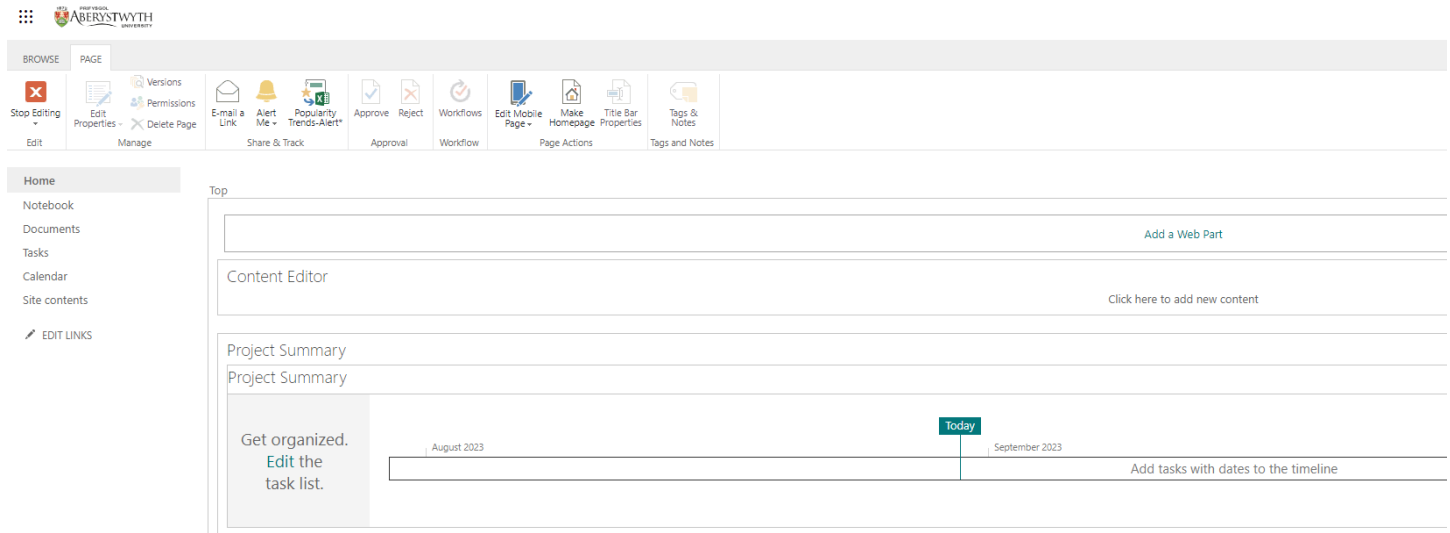
2. Click on 'Add a Web Part' in the middle of the screen - the list of available web parts will appear:



3. Scroll down and click on 'Media and Content' in the Categories menu on the left, to display the web parts in that category.

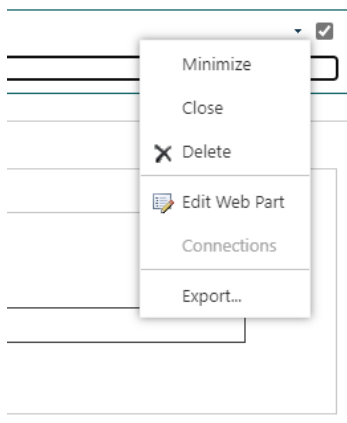
4. Select 'Content Editor' from the 'Parts' menu and click the Add button (far right) to add this web part.

5. The Content Editor web part will now display on the screen:



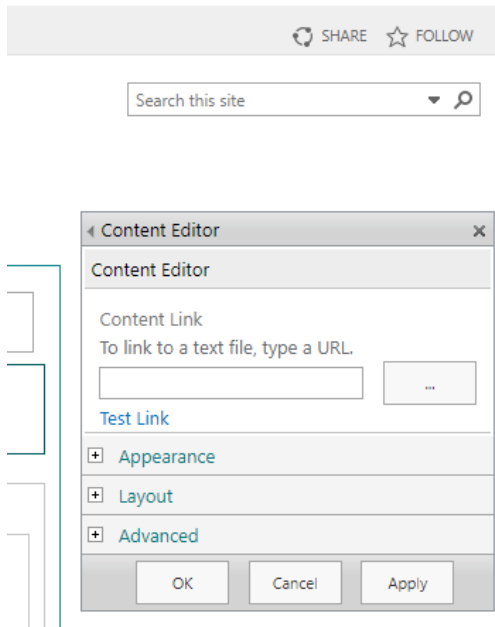
6. Click on 'Click here to add new content' and type some text as an introduction to your site.

7. To change the heading of the web part, move your mouse to the top right corner of the Content Editor box and click on the very small triangle next to the check box.

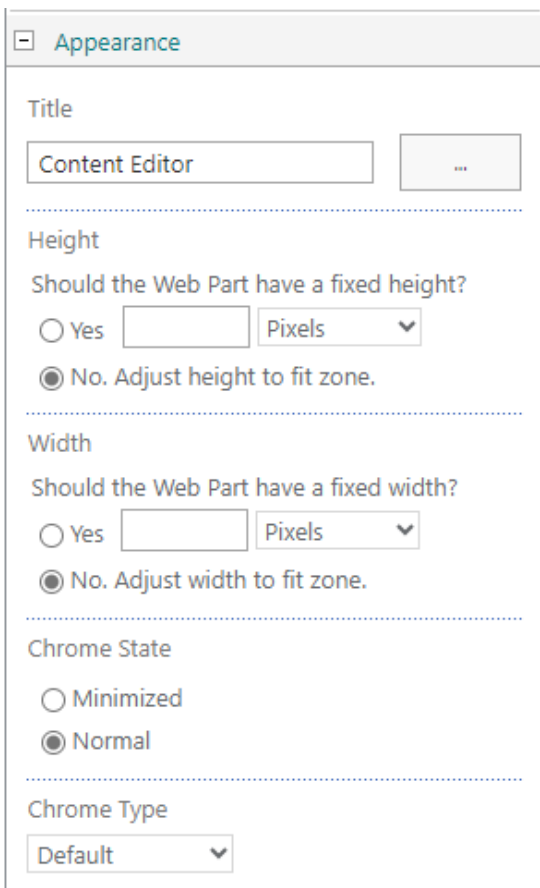


8. Choose 'Edit Web Part' from the menu that appears.

9. The Web Part properties bar will appear down the right of the screen.

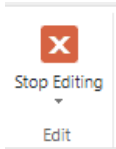


10. Expand the 'Appearance' section.

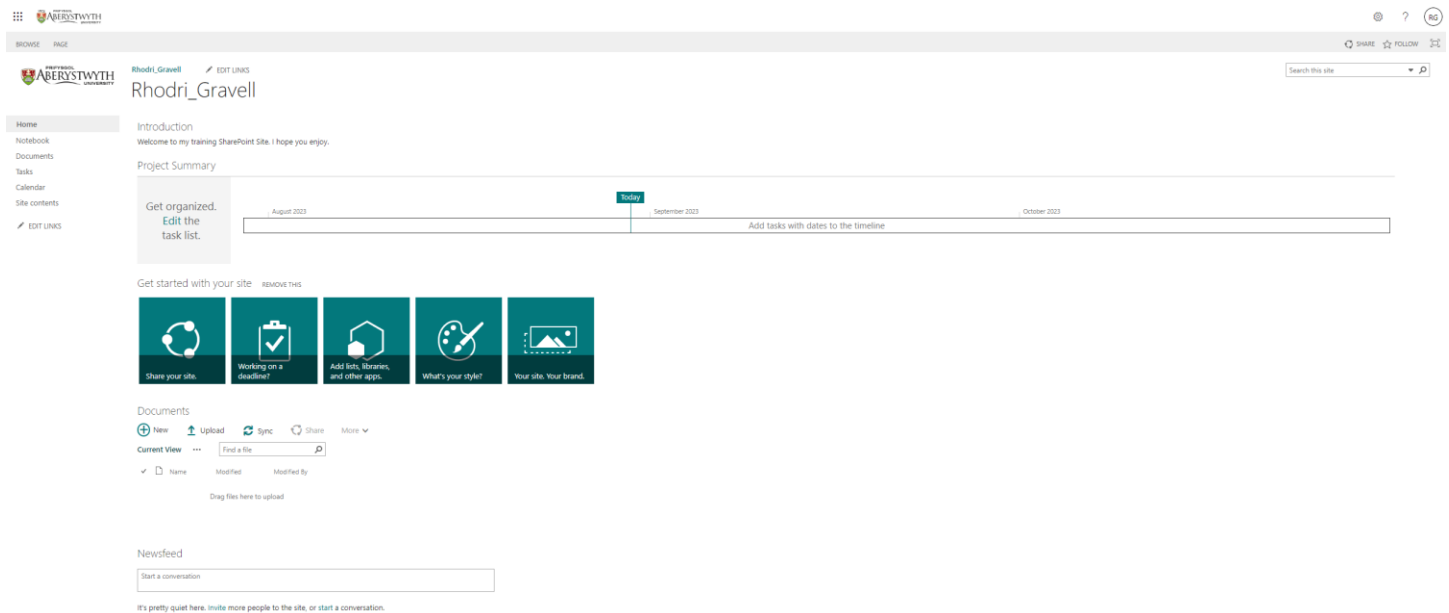


11. Edit the 'Title' box and replace the text 'Content Editor' with the name of your Site.
 Scroll down and click OK to finish.

12. Now that your site has a heading and introductory text, finish editing the page by clicking on the Page tab and then the Stop Editing button at the top left of the screen.



13. Click on the Browse tab at the top of the screen to view your page as others will see it.

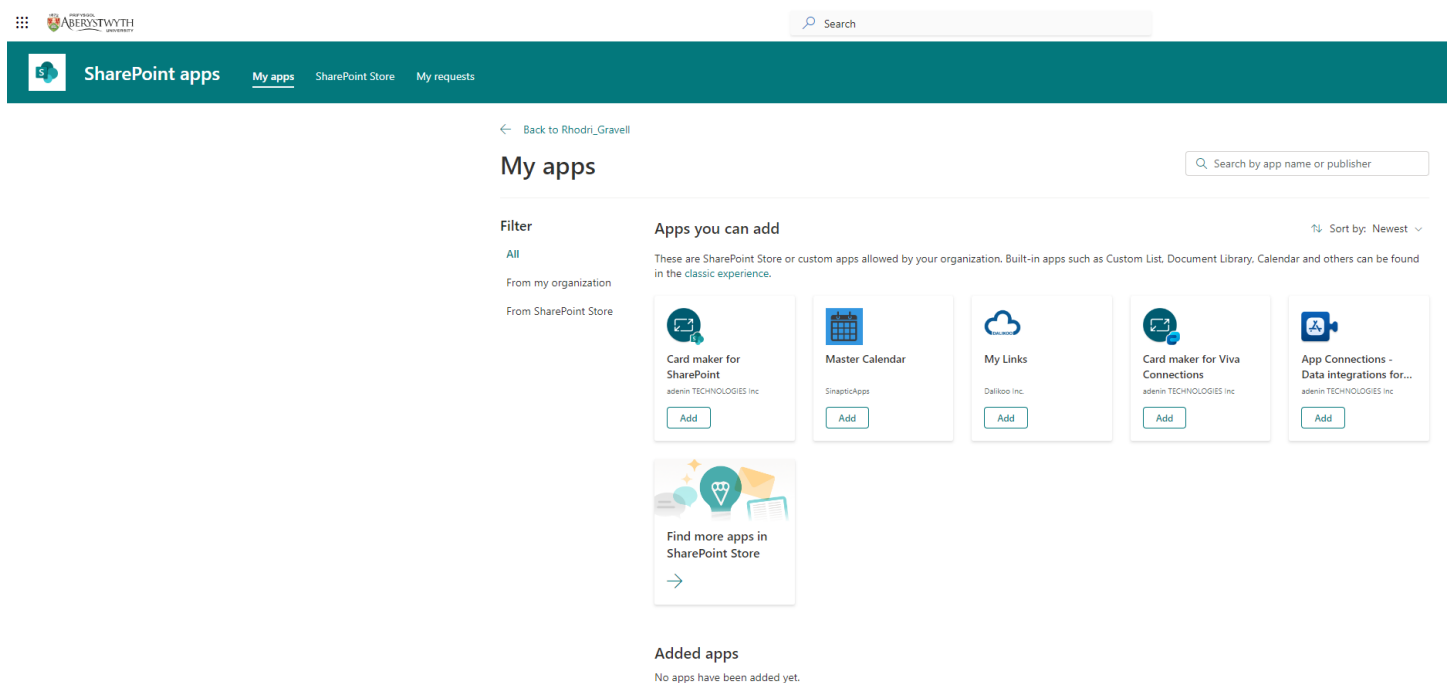


Exercise 2 – Creating and Customising a Document Library

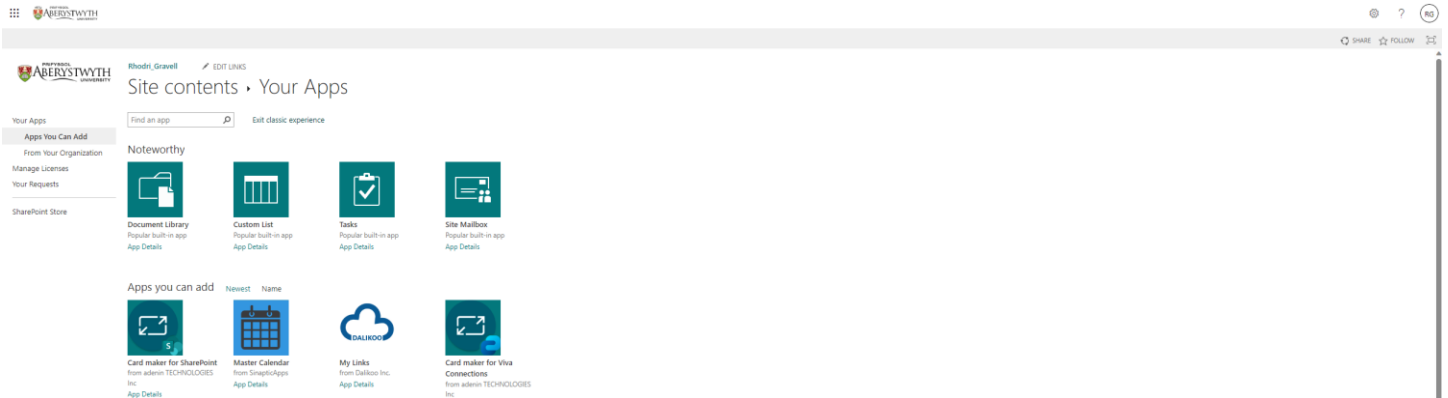
Document Libraries are used to store documents so that they can be accessed by yourself and other users. You will create a new document library for your site. You will customise the columns and the default view and create an alert on the library. You will also open the document library in explorer.

A. Create the Document Library

1. Click on the cog symbol at the top right of the screen and select 'Add an App'. The 'My apps' screen will appear.



2. To add a built-in app such as a Custom List, Document Library and Calendar, click on the link to the 'Classic Experience'.
3. The 'Your Apps' screen will appear:

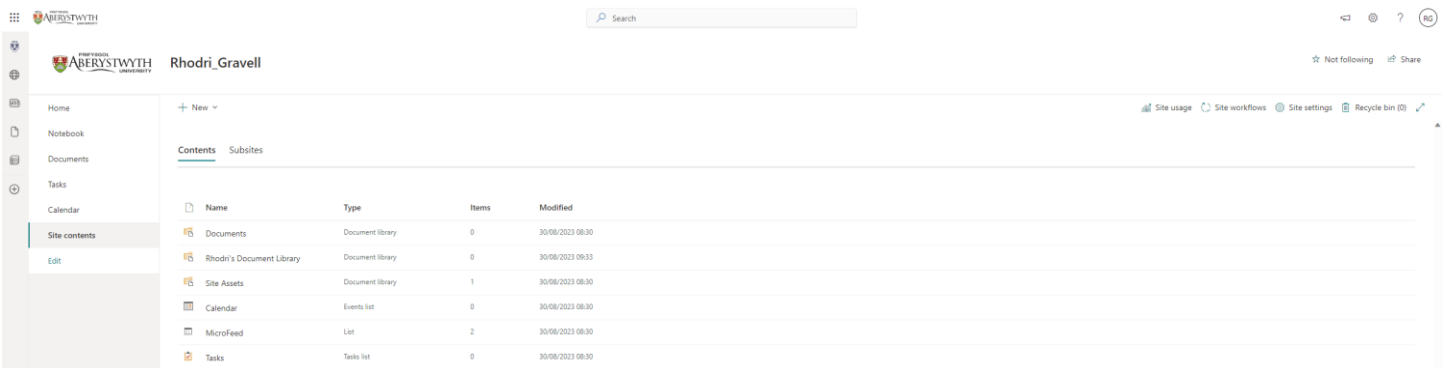


4. Click the Document Library option.

5. Type the name of your document library in the Name box (e.g. Suzy's Document Library)

6. Click the 'Create' button.

7. You will be sent to the Site Contents page where you will see your new document library listed:

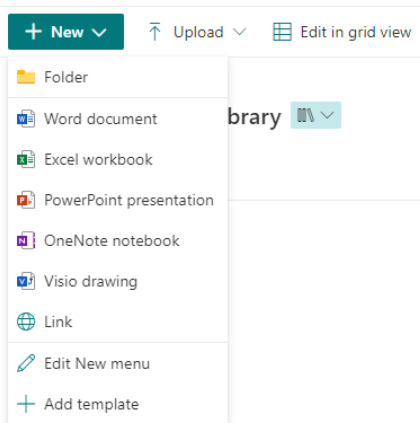


B. Add a document

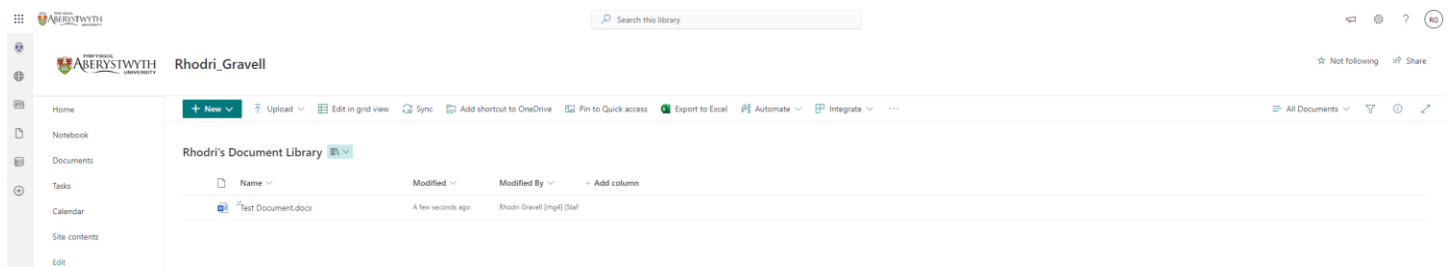
1. Click on your document library in the Site Contents view.
2. Click on 'New' at the top of the page



3. Choose 'Word document' from the menu that appears:



4. Your new document will open in Word Online.
5. Write some text in the document.
6. Click on 'Document' in the blue bar at the top of the screen and give your document a sensible name e.g. Suzy's Lovely Document. Click Enter to save the new name.
7. Wait until the 'Saving' text at the top of the screen has changed to 'Saved'
8. Close your current tab to return to the document library in SharePoint.
9. Your new document will be listed in your library:

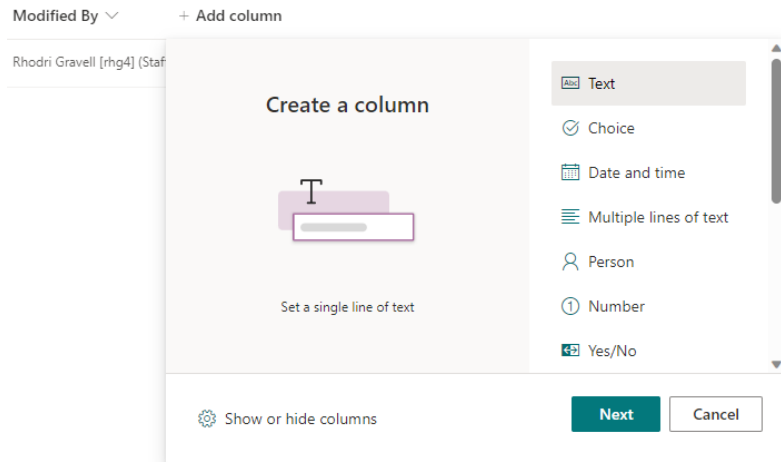


Note:

Your document library will automatically have version control switched on so every time you edit a document the system will store it as a new version. You will be able to roll back to a previous version of a document if required.

C. Customise the columns

1. Click on '+ Add column' at the right of the column headings, select the type of column you wish to add (e.g. Number), then click 'Next'.



2. Type the name of the new column in the 'Name' box in the 'Create a column' panel that appears on the right (e.g. 'Document Code')

Create a column ×

[Learn more about column creation.](#)

Name *

Description

Type

Number ▼

Preview

123,456

– \$ € ¥ % Custom

Number of decimal places

Automatic ▼

Default value

Enter a number

Use calculated value ⓘ

More options ▼

3. Click the Save button.

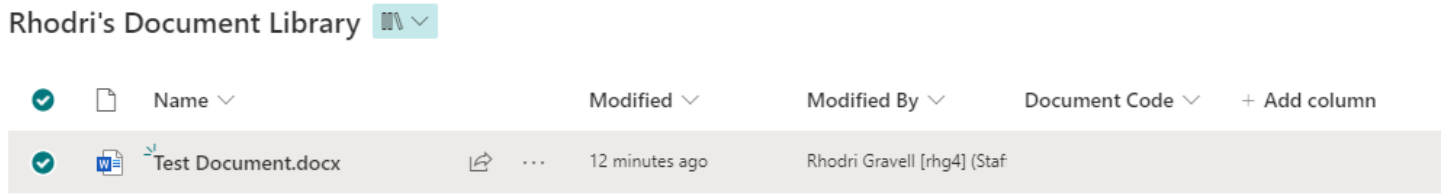
4. Your new column will be displayed in the column headings along with the existing columns

The screenshot shows a OneDrive interface for a user named 'Rhodri_Gravell'. The main area displays a document library with a table of documents. The table has four columns: 'Name', 'Modified', 'Modified By', and 'Document Code'. A fifth column, '+ Add column', is visible at the end of the header row. One document is listed: 'Test Document.docx', modified '12 minutes ago' by 'Rhodri Gravell (Staff)'. The interface includes a search bar at the top, a left-hand navigation pane with options like Home, Notebook, Documents, Tasks, Calendar, Site contents, and Edit, and a top toolbar with actions like New, Upload, Edit in grid view, Sync, Add shortcut to OneDrive, Pin to Quick access, Export to Excel, Automate, and Integrate.

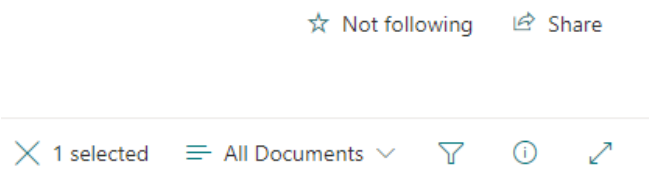
Name	Modified	Modified By	Document Code	+ Add column
Test Document.docx	12 minutes ago	Rhodri Gravell (Staff)		

D. Update the Document Code for your document

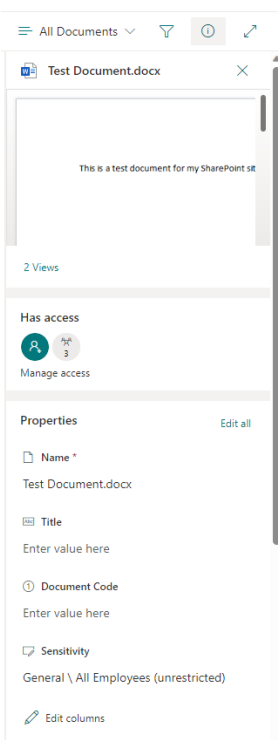
1. Click to the left of your document's name so that a green tick appears:



2. Click on the 'i' symbol on the right-hand side of the screen to open the details pane.



3. Information about the document will be shown in a panel on the right of the screen:




4. Click on 'Enter value here' beneath 'Document Code'.

5. Type the code and press enter to finish.

6. You will see a 'Saving' message and then the code will be saved, and will also appear in the document list:

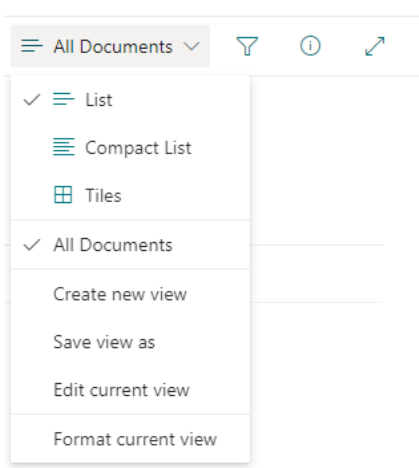
+ New ▾ Edit in grid view Open ▾ Share Copy link Delete Pin to top Favorite Download Rename Automate ▾ Move to Copy to ⋮

Rhodri's Document Library ▾

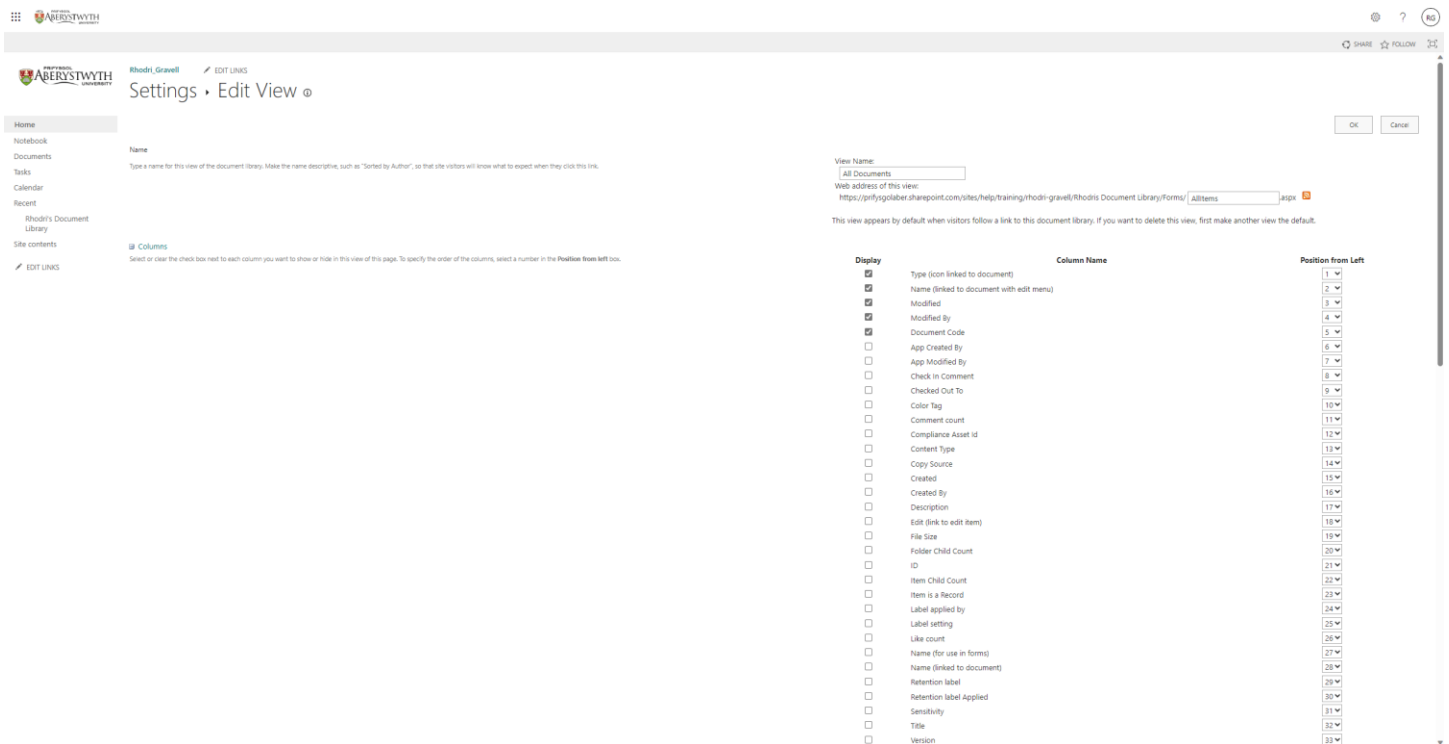
✓	Name ▾	Modified ▾	Modified By ▾	Document Code ▾	+ Add column
✓	 Test Document.docx	A few seconds ago	Rhodri Gravel [rhg4] (Staf	1,234	

E. Change the Default View

1. Click on 'All Documents' (at the top right of the screen) and select 'Edit current view'.



2. The Edit View screen will be displayed:



3. Make the Version column show up in the default view by ticking the box to its left.

4. Move it so that it appears as the first column on the left by changing the number to its right to 1.

5. Scroll down and click OK to save.

6. Your document library will now be displayed, showing the version column being displayed on the left:

+ New Upload Edit in grid view Sync Add shortcut to OneDrive Pin to Quick access Export to Excel Automate Integrate ...

Rhodri's Document Library

Version	Name	Modified	Modified By	Document Code	+ Add column
4.0	Test Document.docx	8 minutes ago	Rhodri Gravell [rhg4] (Staff)	1,234	

F. Create an alert on the library

1. Click on the ... in the grey bar across the top of the page and select Alert me.
2. The 'Alert me when items change' pop-up will appear:

Alert me when items change [X]

Alert Title
Enter the title for this alert. This is included in the subject of the notification sent for this alert.
Rhodri's Document Library

Send Alerts To
You can enter user names or e-mail addresses. Separate them with semicolons.
Users:
Rhodri.Gravell.(rhg4).(Staff) x

Delivery Method
Specify how you want the alerts delivered.
Send me alerts by:
 E-mail rhg4@aber.ac.uk
 Text Message (SMS)
 Send URL in text message (SMS)

Change Type
Specify the type of changes that you want to be alerted to.
Only send me alerts when:
 All changes
 New items are added
 Existing items are modified
 Items are deleted

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.
Send me an alert when:
 Anything changes
 Someone else changes a document
 Someone else changes a document created by me
 Someone else changes a document last modified by me

When to Send Alerts
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)
 Send notification immediately
 Send a daily summary
 Send a weekly summary

Time:
Wednesday 02:00

OK Cancel

3. The alert will be given a title – you can change this to suit you (e.g. 'Change in Suzy's Document Library')
4. Leave the rest of the settings as they are and click OK to finish.
5. You will now be emailed when anything changes in the document library.

Note:

Your document library will automatically have version control switched on so every time you edit a document the system will store it as a new version. You will be able to roll back to a previous version of a document if required.

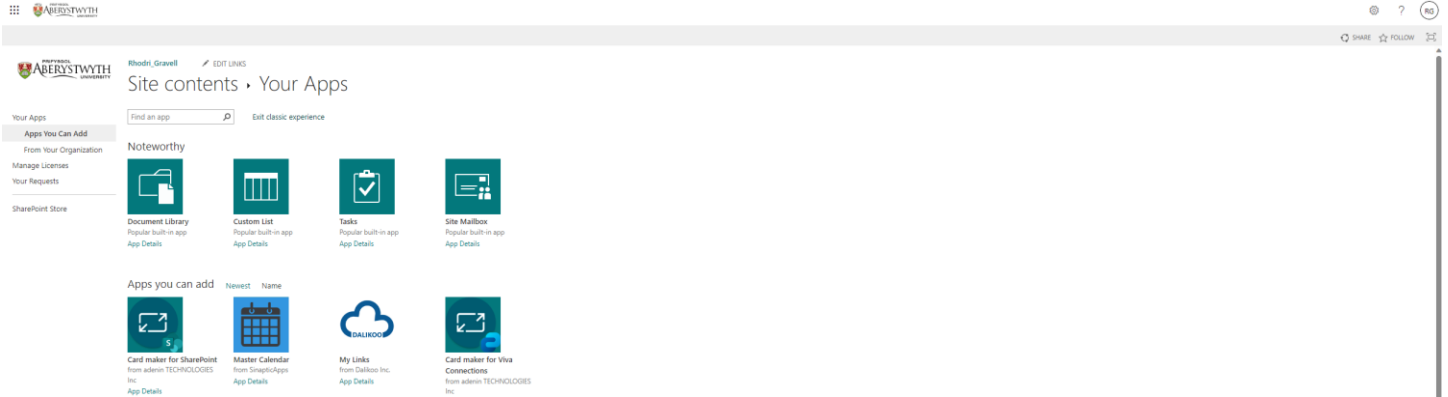
Exercise 3 – Creating a Calendar

Calendars are used in SharePoint to store events related to a group, so that they can be accessed by all the members of the group. The group could be a team, department or project group or even the whole of the university. You will create a new calendar for your site and customise the columns.

A. Create the Calendar

1. Click on the cog symbol at the top right of the screen and select 'Add an App'.
2. The 'My apps' screen will appear.

3. To add a built-in app such as a Custom List, Document Library and Calendar, click on the link to the 'Classic Experience'.
4. The 'Your Apps' screen will appear:











5. Click the Calendar option.

6. Type the name of your calendar in the Name box (e.g. Suzy's Calendar).

7. Click the 'Create' button.

8. Your calendar will be created and listed in the Site Contents:

[Contents](#) [Subsites](#)

 Name	Type	Items	Modified
 Documents	Document library	0	30/08/2023 08:30
 Rhodri's Document Library	Document library	1	30/08/2023 10:22
 Site Assets	Document library	1	30/08/2023 08:30
 Calendar	Events list	0	30/08/2023 08:30
 MicroFeed	List	2	30/08/2023 08:30
 Rhodri's Calendar	Events list	0	30/08/2023 10:28
 Tasks	Tasks list	0	30/08/2023 08:30

9. Click on your new Calendar to view it.

Rhodri Gravel EDIT LINKS
Rhodri's Calendar

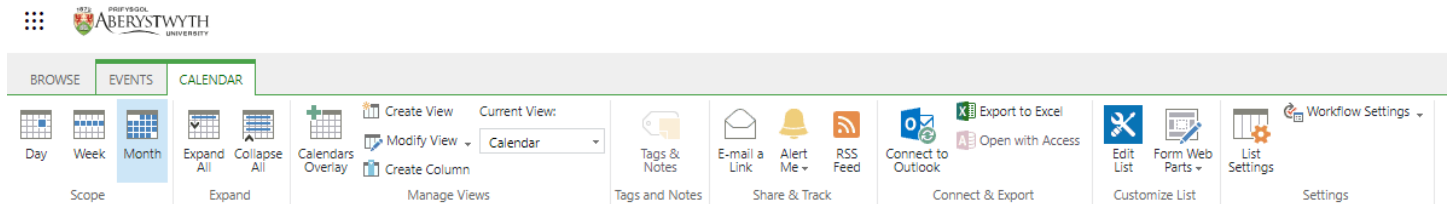
2023
 Jan Feb Mar
 Apr May Jun
 Jul **Aug** Sep
 Oct Nov Dec
 Today is 30 August 2023

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

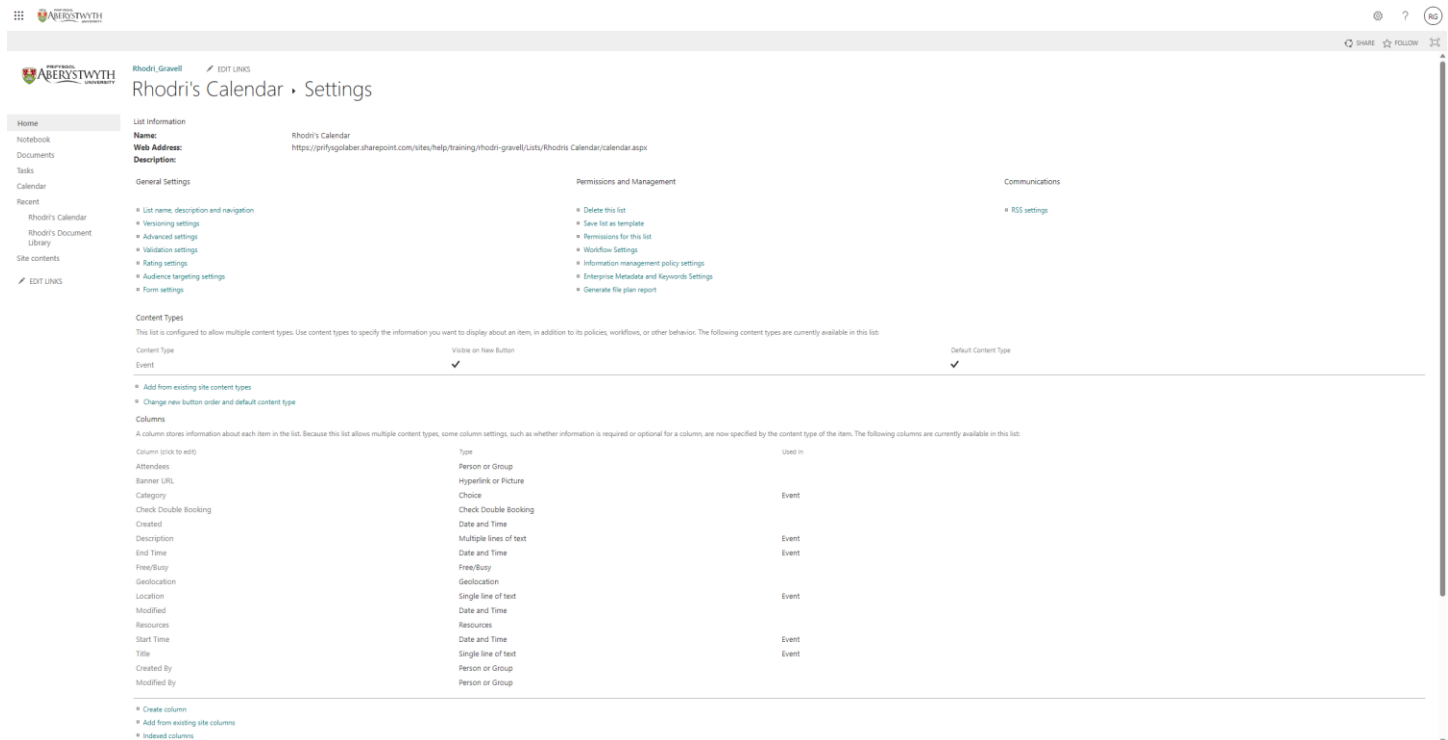
- Calendars in View
- Rhodri's Calendar**
- Home
- Notebook
- Documents
- Tasks
- Calendar
- Recent
- Rhodri's Calendar
- Rhodri's Document
- Library
- Site contents
- EDIT LINKS

B. Customise the Category column

1. Click on the 'Calendar' tab at the top left of the page.
2. The Calendar menu will appear across the top of the screen:



3. Click on List Settings towards the right of the menu.
4. The List Settings screen will be shown:



5. Scroll down to view the Columns section on the page

Columns

A column stores information about each item in the list. Because this list allows multiple content types, some column settings, such as whether information is required or optional for a column, are now specified by the content type of the item. The following columns are currently available in this list:

Column (click to edit)	Type	Used in
Attendees	Person or Group	
Banner URL	Hyperlink or Picture	
Category	Choice	Event
Check Double Booking	Check Double Booking	
Created	Date and Time	
Description	Multiple lines of text	Event
End Time	Date and Time	Event
Free/Busy	Free/Busy	
Geolocation	Geolocation	
Location	Single line of text	Event
Modified	Date and Time	
Resources	Resources	
Start Time	Date and Time	Event
Title	Single line of text	Event
Created By	Person or Group	
Modified By	Person or Group	

- Create column
- Add from existing site columns
- Indexed columns

6. Click on Category – the Change Column screen appears:

Settings ▸ Edit Column Ⓞ

Home

Notebook

Documents

Tasks

Calendar

Recent

- Rhodri's Calendar
- Rhodri's Document Library

Site contents

EDIT LINKS

Name and Type

Type a name for this column.

Column name:

The type of information in this column is:

Single line of text
 Multiple lines of text
 Choice (menu to choose from)
 Number (1, 1.0, 100)
 Currency (\$, ¥, €)
 Date and Time

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
 Yes No

Enforce unique values:
 Yes No

Type each choice on a separate line:

Meeting

Work hours

Business

Holiday

Display choices using:
 Drop-Down Menu
 Radio Buttons
 Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:
 Yes No

Default value:
 Choice Calculated Value

Column Formatting:
 Change the display of this column by adding JSON below.
 Remove the text from the box to clear the custom formatting.
[Learn more about formatting columns with JSON](#)

7. In the Additional Column Settings section, edit the 'Type each choice on a separate line:' box to show your choice of categories e.g. Staff, Student, All.

Type each choice on a separate line:

Meeting

Work hours

Business

Holiday

Get-together

Gifts

Birthday

Anniversary

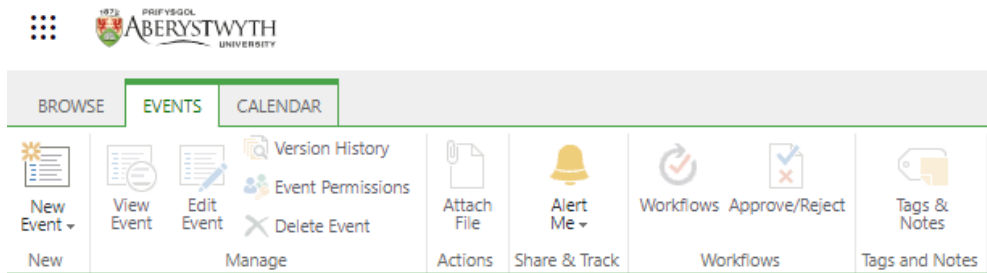
8. Change the Allow 'Fill-in' choices to No so that users can only choose from the options you've added.

9. Click OK to save.

10. You will be returned to the Calendar Settings page.

C. Add Events to the Calendar

1. Return to your calendar by clicking on its name at the top of the screen – e.g. click on 'Suzy's Calendar'
2. Click on 'Events' at the top of page and the Events menu will appear across the top of the screen:



3. Click 'New Event'
4. The 'New Item' screen will appear:

The screenshot shows a window titled 'Rhodri's Calendar - New Item'. It features a toolbar with 'EDIT', 'Save', 'Cancel', 'Paste', 'Copy', 'Attach File', and 'Spelling'. Below the toolbar are the following fields:

- Title *
- Location
- Start Time * (30/08/2023, 11:00)
- End Time * (30/08/2023, 12:00)
- Description
- Category (dropdown menu)
- All Day Event Make this an all-day activity that doesn't start or end at a specific hour.
- Recurrence Make this a repeating event.

At the bottom right, there are 'Save' and 'Cancel' buttons.

5. Add the details of a new event and click Save to finish.

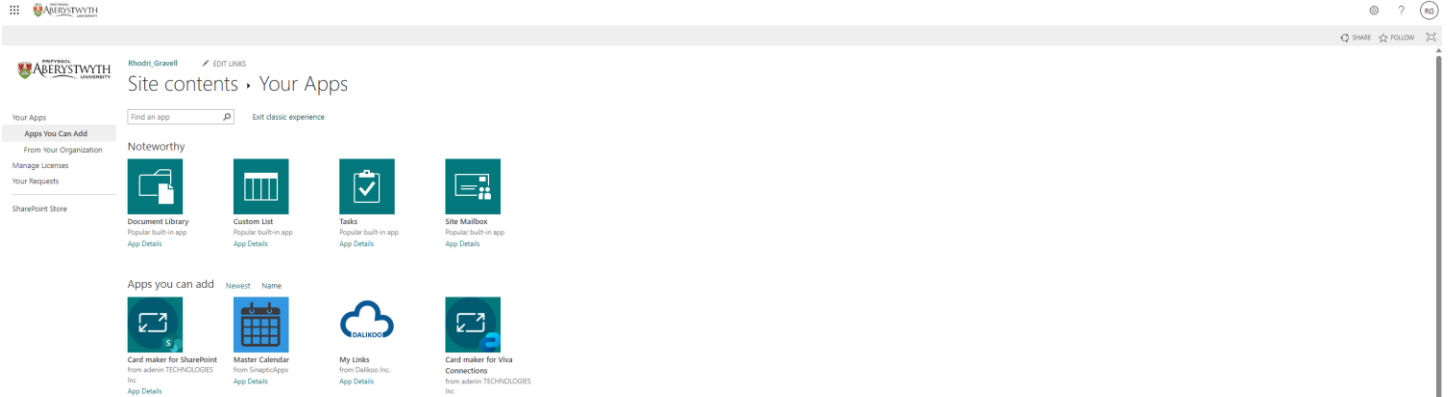
Exercise 4 – Creating a Task List

Task Lists are used in SharePoint to store tasks related to a group, so that they can be accessed by all the members of the group. You will create a new task list for your site, make sure that it will alert users when tasks are assigned to them, and customise the columns. You will also add tasks to the timeline.

A. Create the Task List

1. Click on the cog symbol at the top right of the screen and select 'Add an App'.
2. The 'My apps' screen will appear.

3. To add a built-in app such as a Custom List, Document Library and Calendar, click on the link to the 'Classic Experience'.
4. The 'Your Apps' screen will appear



5. Click the Tasks option.

6. Type the name of your Task List in the Name box (e.g. Suzy's Task List).

7. Click the 'Create' button.

8. Your Task List will be created and listed in the Site Contents:

[Contents](#) [Subsites](#)

Name	Type	Items	Modified
Documents	Document library	0	30/08/2023 08:30
Rhodri's Document Library	Document library	1	30/08/2023 10:22
Site Assets	Document library	1	30/08/2023 08:30
Calendar	Events list	0	30/08/2023 08:30
MicroFeed	List	2	30/08/2023 08:30
Rhodri's Calendar	Events list	1	30/08/2023 10:41
Rhodri's Task List	Tasks list	0	30/08/2023 10:43
Tasks	Tasks list	0	30/08/2023 08:30

9. Click on your Task List to view it.



Rhodri Gravel EDIT LINKS
Rhodri's Task List

- Home
- Notebook
- Documents
- Tasks
- Calendar
- Recent
- Rhodri's Task List
- Rhodri's Calendar
- Rhodri's Document
- Library
- Site contents
- EDIT LINKS



Stop editing this list

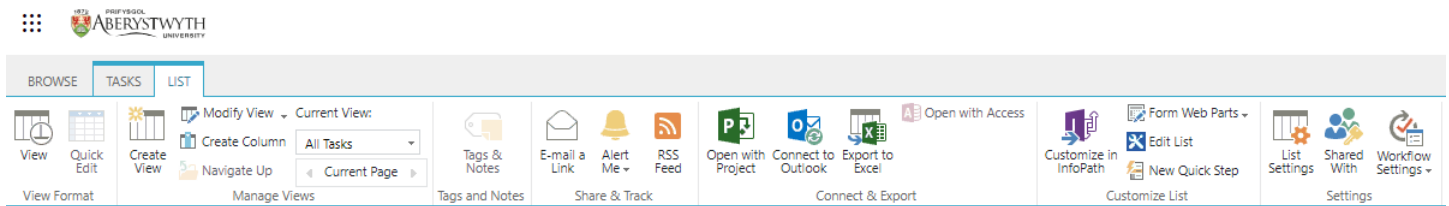
All Tasks Calendar Completed Find an item

<input checked="" type="checkbox"/>	Task Name	Due Date	Assigned To
<input type="checkbox"/>			

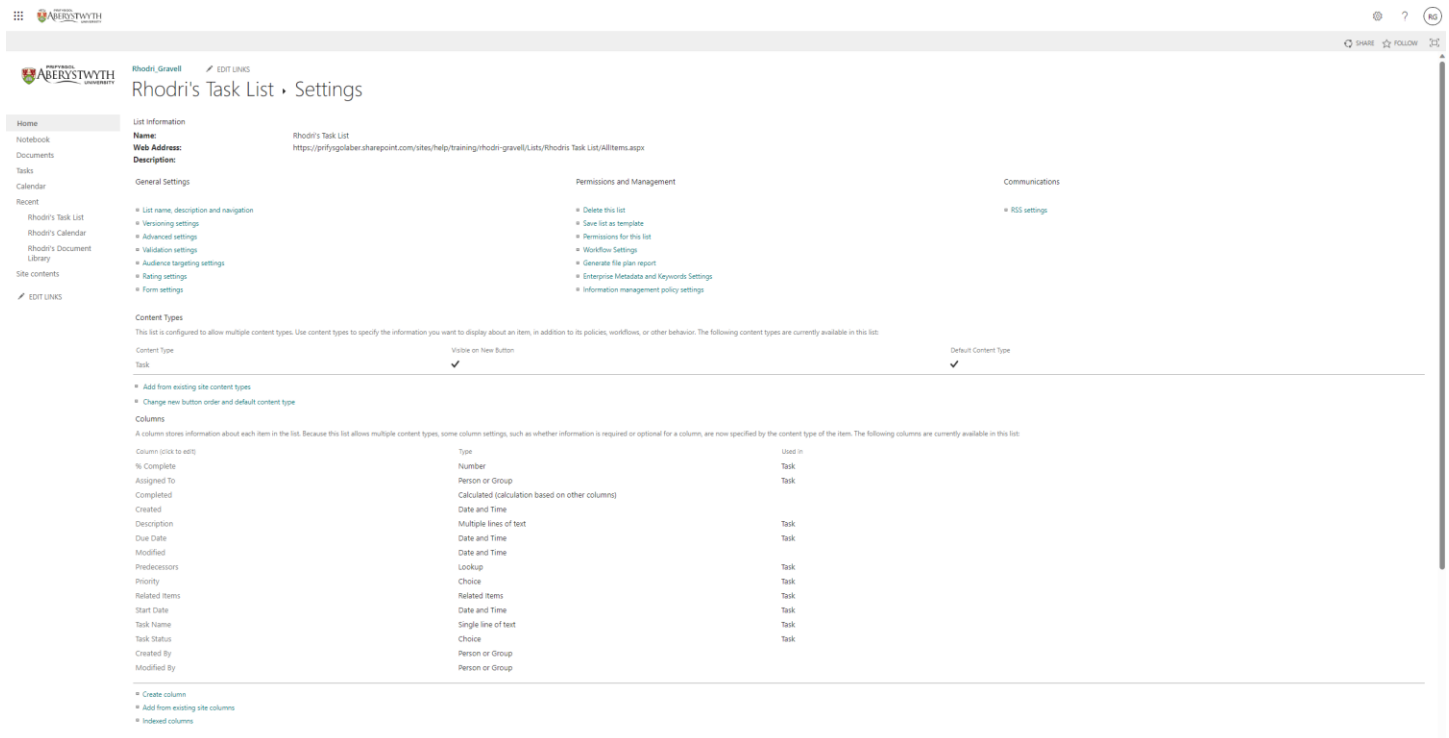
Shortcuts

B. Set the Task List to Notify Task Owners

1. Click on the 'List' tab at the top left of the page.
2. The List menu will appear across the top of the screen:



3. Click on List Settings towards the right of the menu.
4. The List Settings screen will be shown:



5. Click on 'Advanced Settings' in the 'General Settings' column. The advanced settings screen will appear.

Settings ▸ Advanced Settings

Home

Notebook

Documents

Tasks

Calendar

Recent

Rhodri's Task List

Rhodri's Calendar

Rhodri's Document Library

Site contents

EDIT LINKS

Content Types

Specify whether to allow the management of content types on this list. Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors.

Allow management of content types?
 Yes No

Item-level Permissions

Specify which items users can read and edit.

Note: Users with the Cancel Checkout permission can read and edit all items. [Learn about managing permission settings.](#)

Read access: Specify which items users are allowed to read
 Read all items
 Read items that were created by the user

Create and Edit access: Specify which items users are allowed to create and edit
 Create and edit all items
 Create items and edit items that were created by the user
 None

E-Mail Notification

Send e-mail when ownership is assigned or when an item has been changed.

Send e-mail when ownership is assigned?
 Yes No

Attachments

Specify whether users can attach files to items in this list.

Attachments to list items are:
 Enabled
 Disabled

Search

Specify whether this list should be visible in search results. Users who do not have permission to see these items will not see them in search results, no matter what this setting is.

Allow items from this list to appear in search results?
 Yes No

Index Non-Default Views

Specify whether non-default views of this list should be indexed.

Allow non-default views from this list to appear in search results?
 Yes No

Reindex List

Click the Reindex List button to reindex all of the content in this document library during the next scheduled crawl.

Reindex List

Offline Client Availability

Specify whether this list should be available for offline clients.

Allow items from this list to be downloaded to offline clients?
 Yes No

6. In the 'E-Mail Notification' block, set 'Send e-mail when ownership is assigned?' to 'Yes'.

7. Scroll down and click the 'OK' button to save the change.

C. Customise the Columns

1. Return to your new task list by clicking on its name in the left menu – e.g. click on 'Suzy's Task List'.
2. Click on the + sign at the right of the task list.

Stop editing this list

All Tasks Calendar Completed ... Find an item 🔍

✓ Task Name Due Date Assigned To +

--	--	--	--	--

Shortcuts ⓘ

3. In the menu that appears, choose 'Text'.

Stop editing this list

All Tasks Calendar Completed ... Find an item 🔍

✓ Task Name Due Date Assigned To +

--	--	--	--	--

Text

Number

Date and Time

Person or Group

More Column Types...

Shortcuts ⓘ

4. Type the name of the new column (e.g. Project) in the highlighted box and press enter to save.

Stop editing this list

All Tasks Calendar Completed ... Find an item 🔍

✓ Task Name Due Date Assigned To **Text** +

--	--	--	--	--

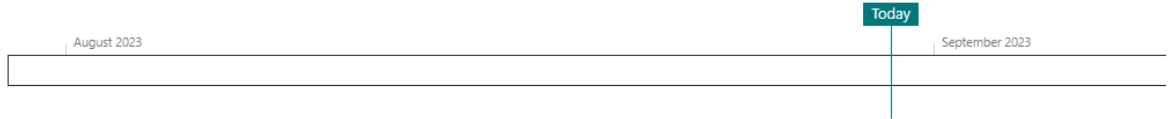
Shortcuts ⓘ

5. Your task list will now be displayed, showing the new column on the right:

Rhodri_Gravell [EDIT LINKS](#)

Rhodri's Task List

- Home
- Notebook
- Documents
- Tasks
- Calendar
- Recent
- Rhodri's Task List
- Rhodri's Calendar
- Rhodri's Document Library
- Site contents
- [EDIT LINKS](#)



Stop editing this list

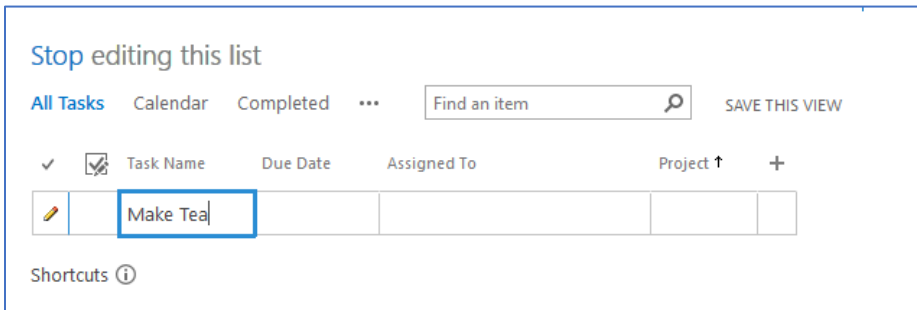
All Tasks Calendar Completed ...

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Task Name	Due Date	Assigned To	Project	+
<input type="checkbox"/>	<input type="checkbox"/>					

Shortcuts

D. Add a Task to the Task List

1. Click into the Task list under 'Task Name' and type the name of your task:



The screenshot shows a task list interface. At the top, it says "Stop editing this list". Below that are navigation options: "All Tasks", "Calendar", "Completed", and a "Find an item" search box. A "SAVE THIS VIEW" button is also present. The task list has columns for "Task Name", "Due Date", "Assigned To", and "Project". The first task is "Make Tea", which is highlighted with a blue box. Below the task list, there is a "Shortcuts" section with an information icon.

2. Click into the 'Due Date' box and use the date picker to pick a date.

3. Click into the 'Assigned To' box and type the userid of the person you want to assign the task to. Choose the correct person from the list of suggestions.

4. Click into the 'Project' box and type the name of the project, e.g. Project X.

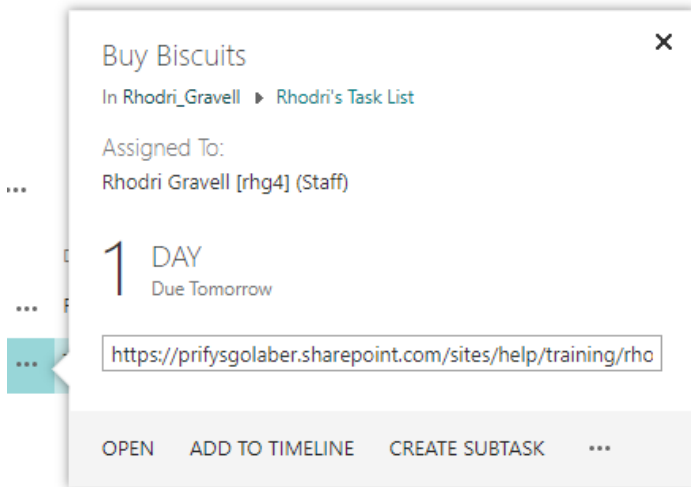
5. Press enter to save.

6. Your first task will automatically be added to the timeline.

7. Create a 2nd task in the same way.

E. Add Tasks to the Timeline

1. Click on the '...' to the right of the title of your 2nd task (the one that is not yet in the timeline).
2. The Task preview will appear:



3. Click on 'ADD TO TIMELINE' to add the item to your timeline.
4. Your timeline will now display both of your tasks:

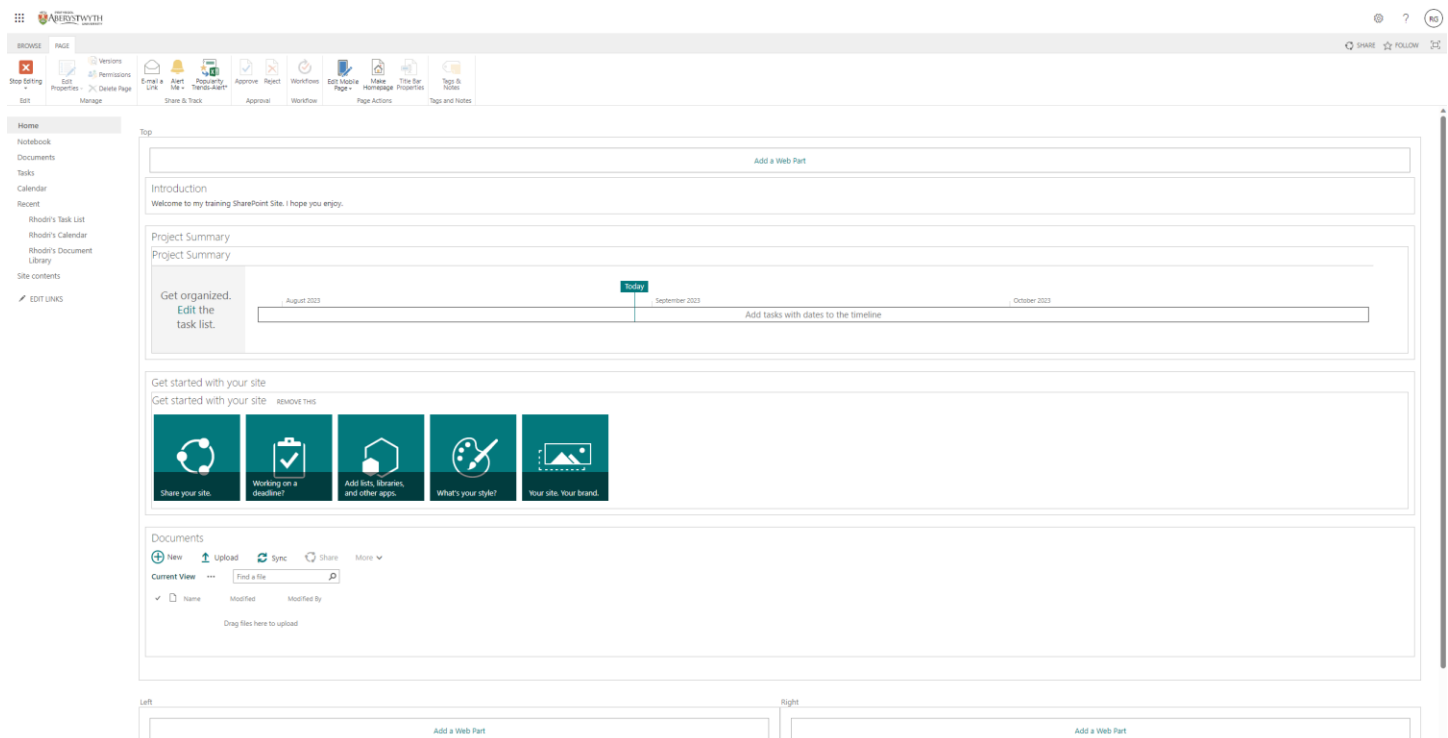


Exercise 5 - Updating the SharePoint Site Homepage

Your Site homepage can include information from libraries and lists within the site to give users a snap-shot of the information within them. You will add web parts to display items from the document library, the calendar and the task list. You will also make changes to the navigation on the left.

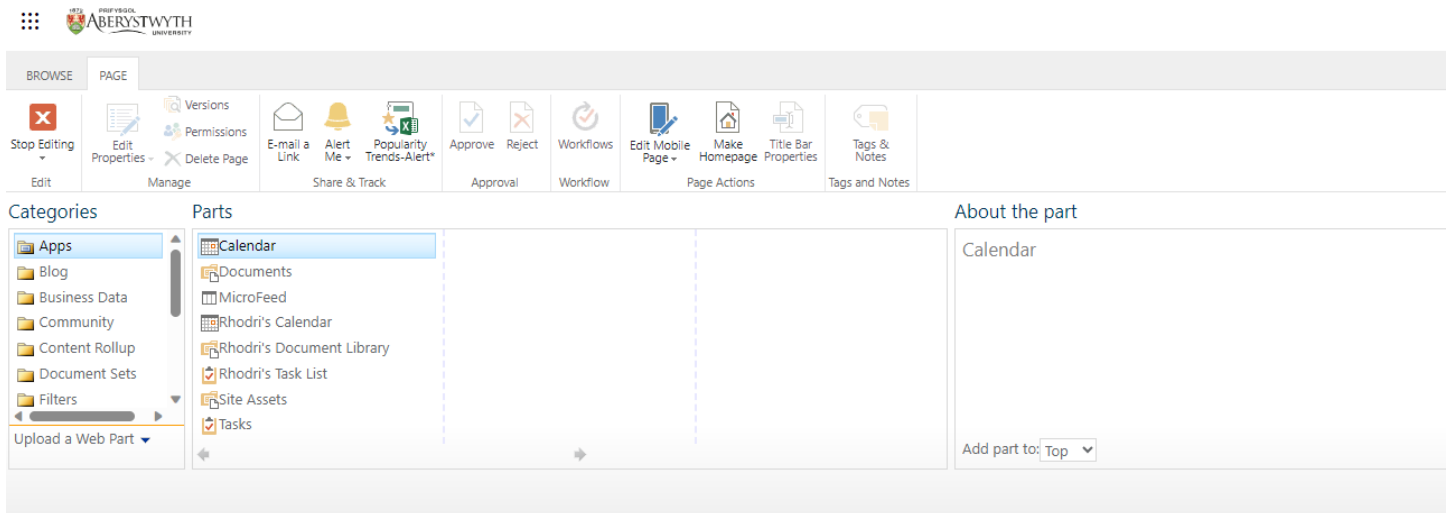
A. Return to your homepage and Start Editing Mode

1. Click on Home in the left menu.
2. Click on Page at the top left of the screen and select 'Edit Page'. The page editing screen will appear:



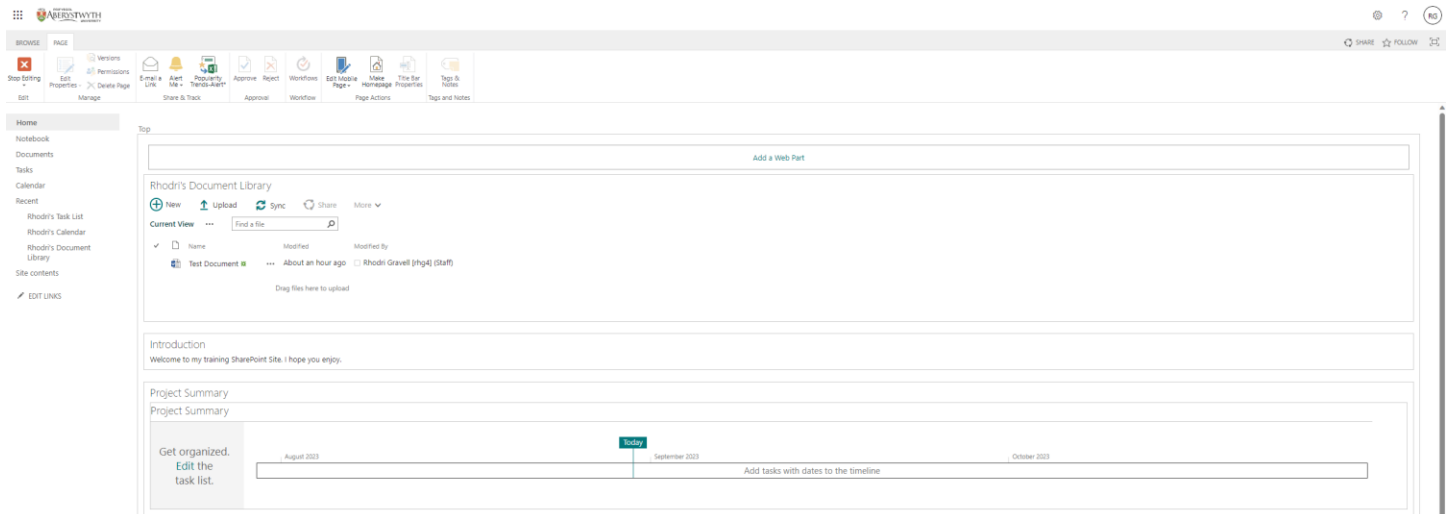
B. Add your Document Library

1. Click on 'Add a Web Part' in the middle of the screen - the list of available web parts will appear:



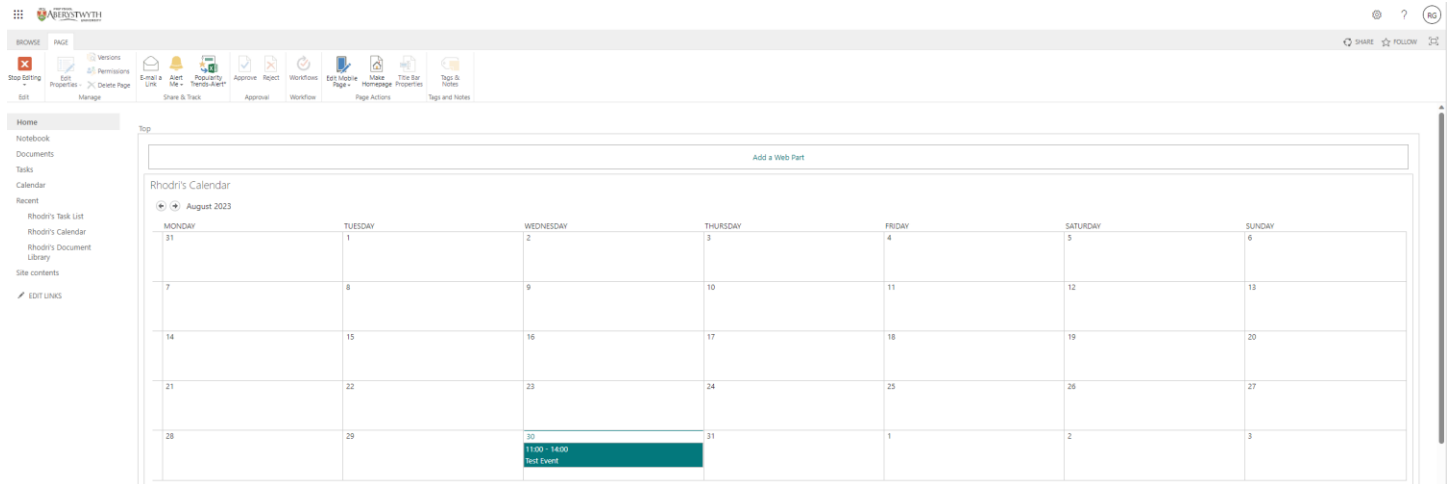
2. Select your document library from the list of Apps (e.g. Suzy's Document Library) and click the Add button to add this web part.

3. Your document library will be displayed within the page:

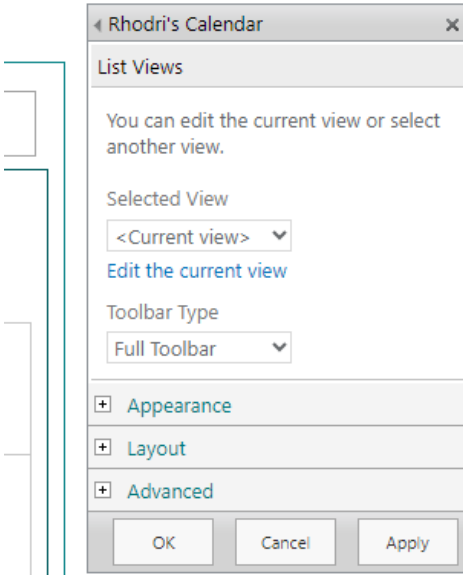


C. Add your calendar

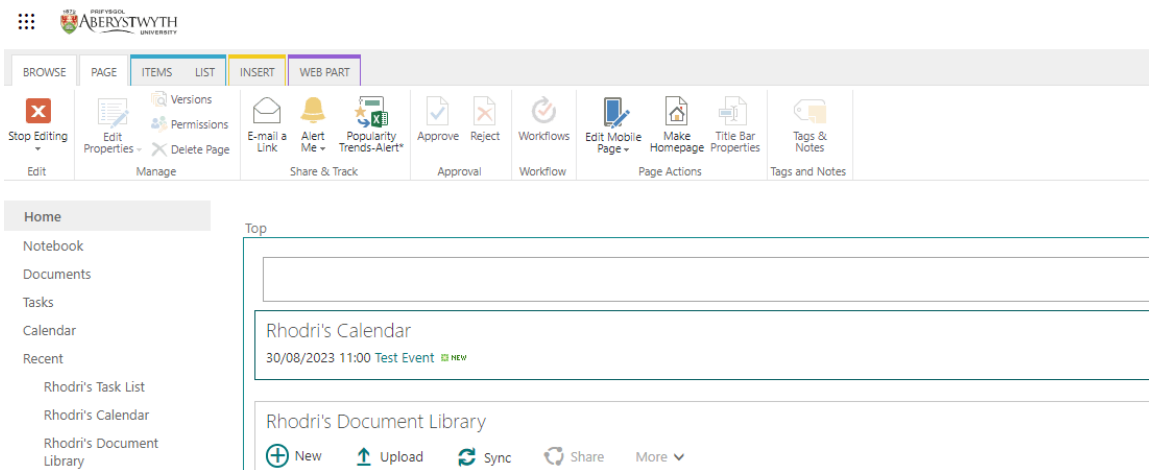
1. Click on 'Add a Web Part' again
2. Select your calendar from the list of Apps (e.g. Suzy's Calendar) and click the Add button to add this web part.
3. Your calendar will be displayed within the page:



4. Displaying the calendar in full takes up too much room.
5. Click into the calendar and then click on the very small triangle next to the tick box in the top right corner.
6. Choose 'Edit Web Part' from the menu that appears.
7. The web part properties bar will appear on the right of the screen:



8. Click on the drop-down menu under 'Selected View' and choose '<Summary View>'.
9. A warning will appear, click OK to dismiss it.
10. Click OK in the properties bar to apply this change.
11. Your calendar will now display a list of upcoming events:



D. Add your task list

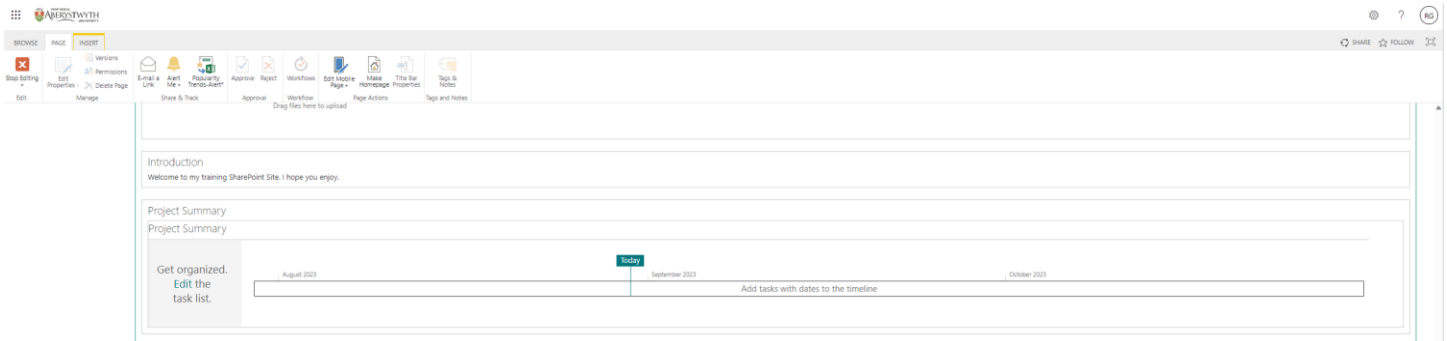
1. Click on 'Add a Web Part' again.
2. Select your task list from the list of Apps (e.g. Suzy's Task List) and click the Add button to add this web part.
3. Your task list will be displayed within the page:

The screenshot shows a SharePoint page with a ribbon at the top containing 'BROWSE', 'PAGE', and 'INSERT' tabs. The 'INSERT' tab is active, showing various web part options like 'Stop Editing', 'Edit Properties', 'Permissions', 'E-mail a Link', 'Alert Me', 'Popularity Trends-Alert', 'Approve', 'Reject', 'Workflows', 'Edit Mobile Page', 'Make Homepage', 'Title Bar Properties', and 'Tags & Notes'. On the left, a navigation pane shows 'Home' with sub-items like 'Notebook', 'Documents', 'Tasks', 'Calendar', and 'Recent'. Under 'Recent', 'Rhodri's Task List' is selected. The main content area shows the 'Rhodri's Task List' web part. It features a title bar with 'Rhodri's Task List' and an 'Add a Web Part' button. Below the title is a horizontal timeline with markers at 00, 03, 06, 09, and 12. A task 'Buy Biscuits' is listed with a due date of 3/8. Below this, there is a '+ new task or edit this list' button and a search box labeled 'Find an item'. A table displays the task list items:

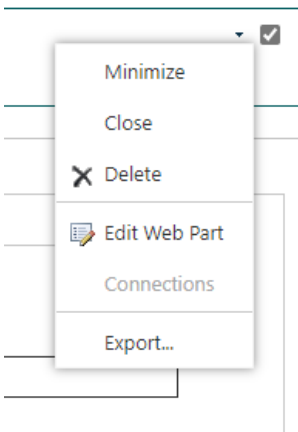
Task Name	Due Date	Assigned To
<input type="checkbox"/> Make Tea	Friday	<input type="checkbox"/> Rhodri Gravel [rhg4] (Staff)
<input type="checkbox"/> Buy Biscuits	Tomorrow	<input type="checkbox"/> Rhodri Gravel [rhg4] (Staff)

E. Rearrange the Web Parts and view your page

1. Scroll down to the text web part you made at the beginning of the session:

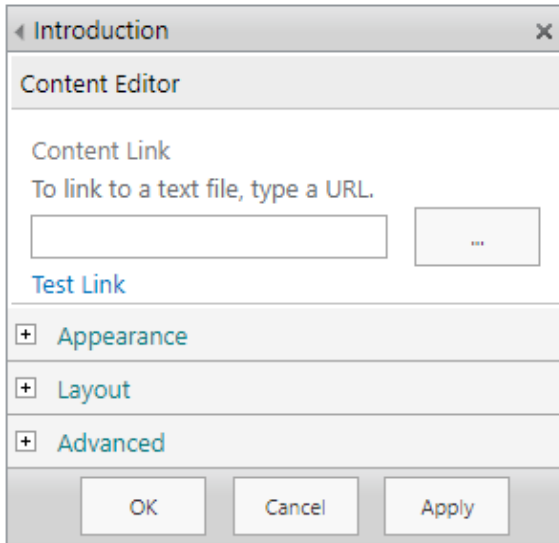


2. Click into the web part, then move your mouse to the top right corner and click on the very small triangle next to the check box.



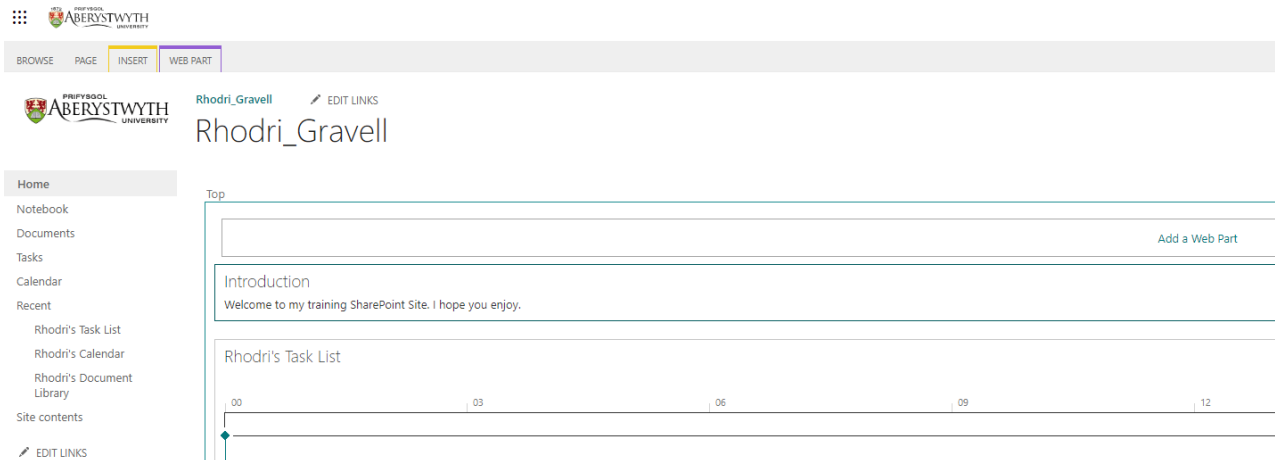
3. Choose 'Edit Web Part' from the menu that appears.

4. The Web Part properties bar will appear down the right of the screen. You may need to scroll up to see it.



5. Click on Layout

6. Change the 'Zone Index' to 0 and click the OK button. This will bring the web part to the top of the area:



7. Move your new web parts into the Left or Right section at the bottom of the screen by opening the web part properties bar for each one and choosing Left or Right in the Zone drop-down menu. If you want to adjust their order in the new area of the page, you can also change their Zone Index.

F. Tidy up the page by removing unused web parts.

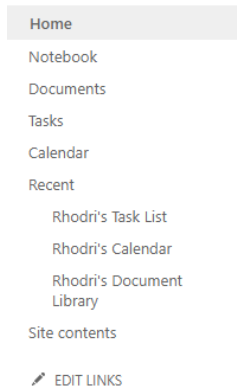
1. Scroll down to the Project Summary web part.
2. Click into the web part, then move your mouse to the top right corner and click on the very small triangle next to the check box
3. Choose Delete from the menu.
4. Repeat the process to remove any other items you do not need.
5. View the page as it will be seen by others by exiting edit mode - click the Page tab at the top left, then click on the red Stop Editing button.
6. Click 'Browse' at the top left of the page. You can now see your page as it will be seen by others:

The screenshot shows a SharePoint page titled 'Rhodri_Gravell' in 'Browse' mode. The page layout includes a left-hand navigation pane with sections for 'Home', 'Notebook', 'Documents', 'Tasks', 'Calendar', and 'Recent'. The main content area is divided into several web parts: 'Introduction' with a welcome message, 'Rhodri's Task List' which includes a Gantt chart and a table of tasks, 'Rhodri's Calendar' showing a 'Test Event', and 'Rhodri's Document Library' containing a 'Test Document'. The top of the page features a navigation bar with 'BROWSE' and 'PAGE' tabs, and a search bar.

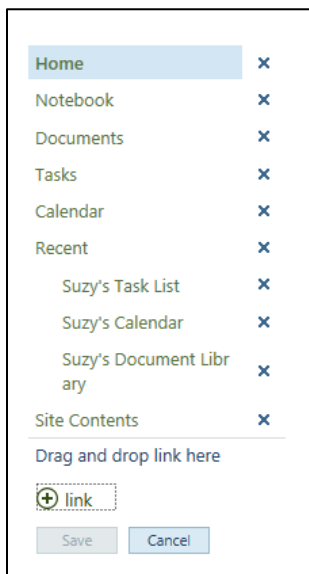
Task Name	Due Date	Assigned To
<input type="checkbox"/> Make Tea	Friday	Rhodri Gravell [ghg] (Staff)
<input type="checkbox"/> Buy Biscuits	Tomorrow	Rhodri Gravell [ghg] (Staff)

G. Remove unused Items from the left menu

1. Click EDIT LINKS under the left menu



2. The menu will now be in 'editing mode'



3. Click on the X to remove any items you don't want showing in the left menu

4. Drag the items you want into the correct order.

5. Click the Save button to finish. The menu should now show as you require:



BROWSE PAGE



Rhodri_Gravell [EDIT LINKS](#)

Rhodri_Gravell

Home

Rhodri's Document Library

Rhodri's Calendar

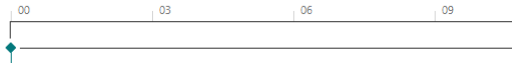
Rhodri's Task List

[EDIT LINKS](#)

Introduction

Welcome to my training SharePoint Site. I hope you enjoy.

Rhodri's Task List

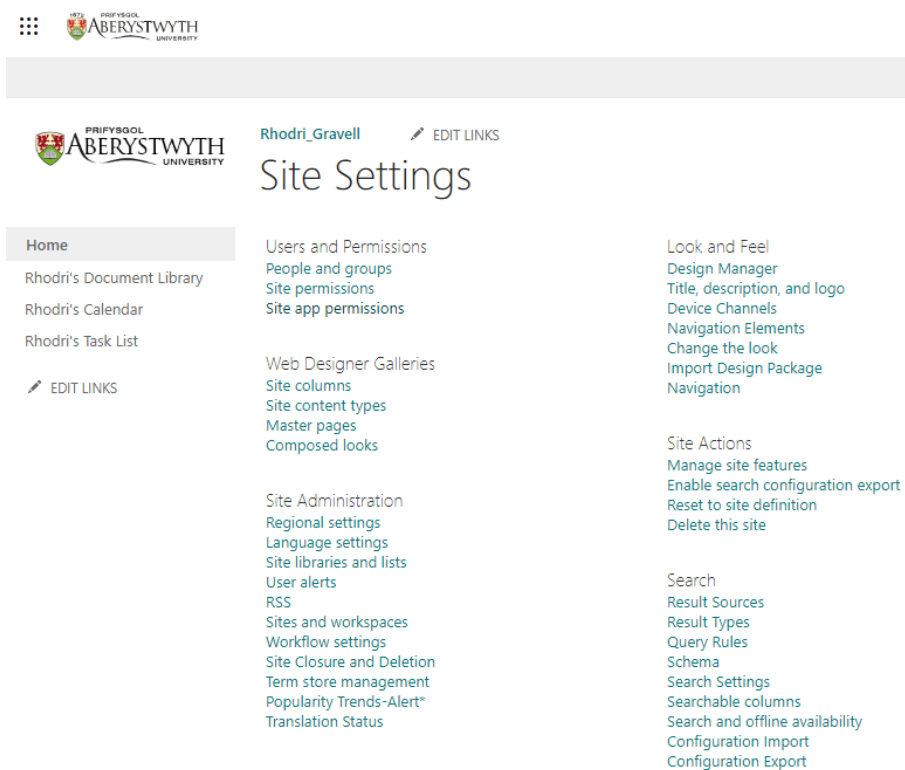


Exercise 6 – Setting Permissions

Your site can only be accessed by the staff that have the correct permissions set. You will add staff to the appropriate permission group so that they can access your site. Permissions can also be set on individual libraries or lists. You will set different permissions on your document library to restrict it further.

A. Access Site Permissions

1. Click on the cog symbol at the top right of the screen and select 'Site Settings'. The Site Settings screen will appear:



2. Click 'Site Permissions' in the first column under 'Users and Permissions'.
3. The permissions for your site will be shown:

Name	Type	Permission Levels
<input type="checkbox"/> <input type="checkbox"/> Rhodri_Gravell Members	SharePoint Group	Contribute
<input type="checkbox"/> <input type="checkbox"/> Rhodri_Gravell Owners	SharePoint Group	Full Control
<input type="checkbox"/> <input type="checkbox"/> Rhodri_Gravell Visitors	SharePoint Group	Read

4. Add an additional user to your Members group so that they can access your site and contribute:

- Click on the Members group to open it and view the current members of the list.

- Click New at the top of the list of members
- Type the user's name (e.g. Suzy) or userid (e.g. sfs) in the first box - choose the correct person from the list of names that appears.
- When you're finished, click SHOW OPTIONS and untick the 'Send an email invitation' tick box.
- Click Share to finish.

5. You should now see the additional user showing in the group list.

B. Set permissions on your document library

1. Return to your document library by clicking on its name in the left menu – e.g. click on ‘Suzy’s Document Library’
2. Click on the cog symbol at the top right of the screen and select ‘Library Settings’.
3. On the pop-up menu which appears, click on ‘More library settings’.

Library settings ✕

Name *

Description

Default sensitivity labels ⓘ

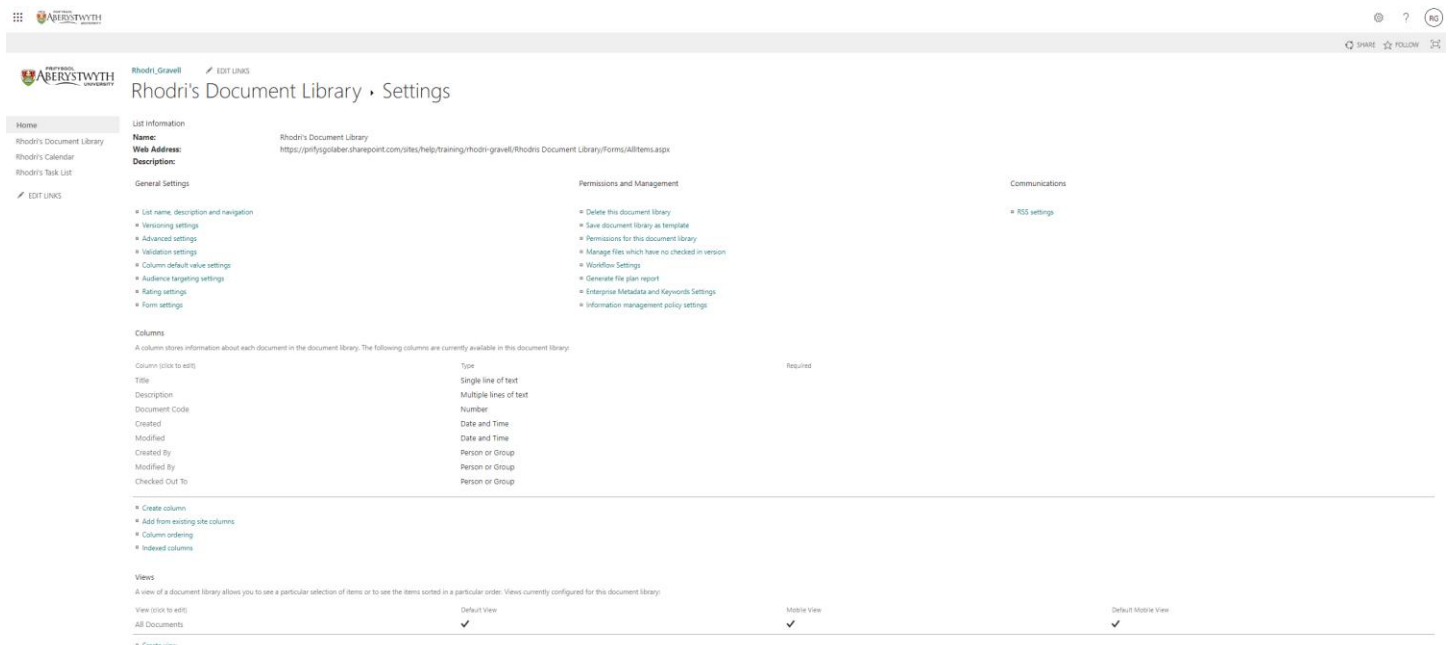
Choose a default sensitivity label that will be applied to all the Office files within your library. This will only be applied to newly created or edited files. [Learn more](#)

None ▾

[More library settings](#)

Save
Cancel

4. The Library Settings screen will appear.



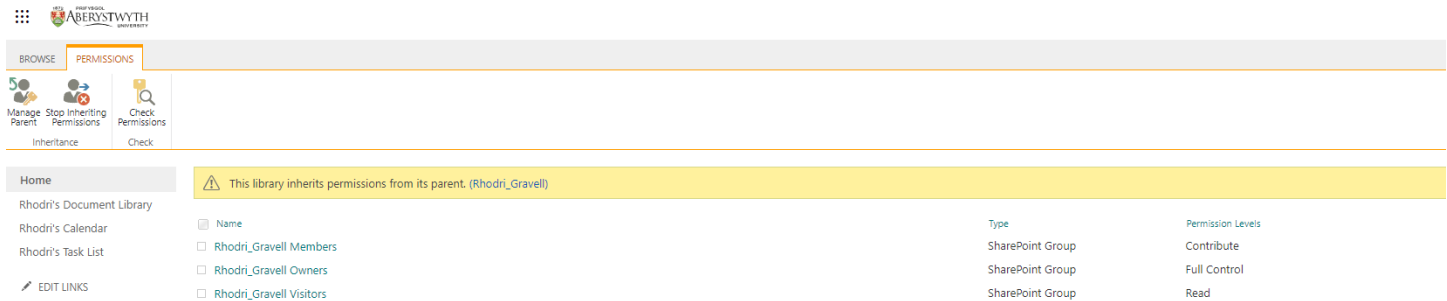
The screenshot shows the 'Rhodri's Document Library - Settings' page. The left-hand navigation pane includes 'Home', 'Rhodri's Document Library', 'Rhodri's Calendar', 'Rhodri's Task List', and 'EDIT LINKS'. The main content area is divided into several sections:

- List Information:** Shows the library name 'Rhodri's Document Library' and its web address: <https://prifysgolaber.sharepoint.com/sites/help/training/rhodri-gravell/rhodri's Document Library/forms/allItems.aspx>.
- General Settings:** Includes options for list name, description, navigation, versioning, advanced settings, validation, column default values, audience targeting, rating, and form settings.
- Permissions and Management:** Includes options to delete the library, save as template, manage files, workflow settings, generate reports, and manage metadata and keywords.
- Columns:** A table showing the current columns in the library. Each column has a 'Type' and a 'Required' status.
- Views:** Shows the current view 'All Documents' and the 'Default View' status.

Column (click to edit)	Type	Required
Title	Single line of text	Required
Description	Multiple lines of text	
Document Code	Number	
Created	Date and Time	
Modified	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

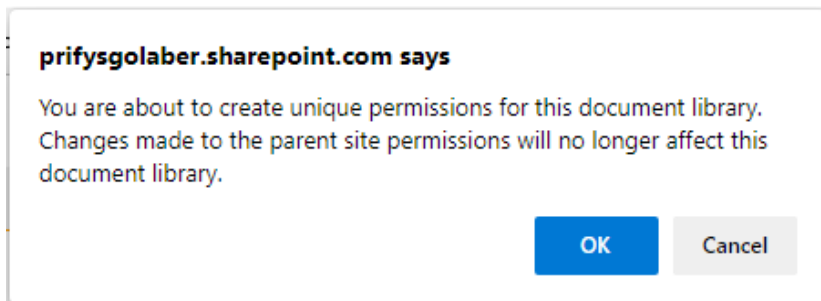
5. Click on 'Permissions for this document library' in the 2nd column under 'Permissions and Management'.

6. The Library permissions page will be displayed:



7. The document library is inheriting permissions from its parent – this needs to be changed. Click 'Stop Inheriting Permissions' in the top left corner.

8. A warning message will appear:



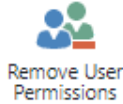
9. Click OK to proceed.

10. You will now see the message 'This library has unique permissions' in the yellow bar at the top of the screen.

11. Let's say that this document library should only be visible to people in the Members group, and not the Visitors group, and you want to add an additional individual.

12. Remove the Visitors group:

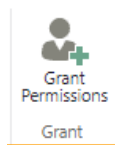
- Tick the box to the left of the Visitors group.
- Click on Remove User Permissions in the menu across the top:



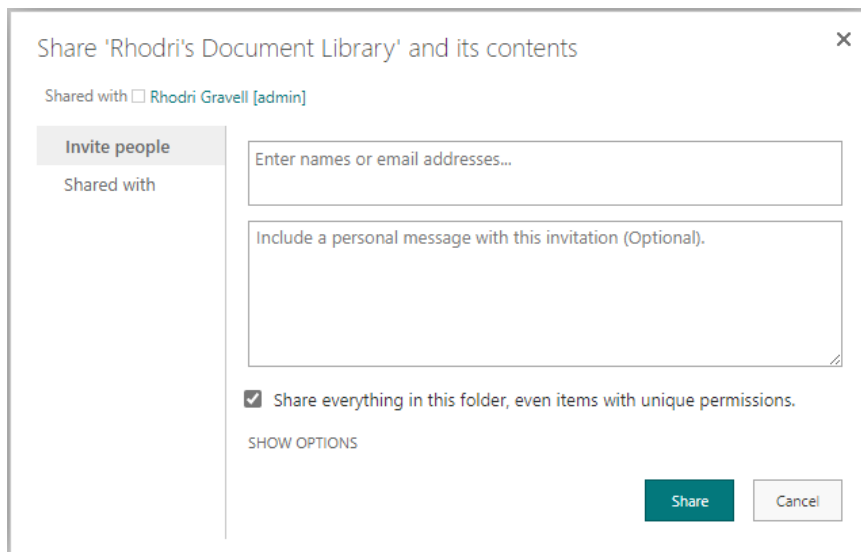
- A warning will pop-up - click OK to confirm.
- The Visitors group will no longer be visible in the permissions list.

13. Add a new individual:

- Click on Grant Permissions in the menu across the top:



- The Sharing pop-up will be displayed.



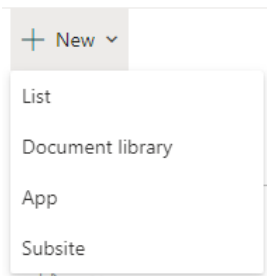
- Type the user's name or userid in the first box ('Enter names or email addresses') and pick the right name from the list that appears.
- Click 'SHOW OPTIONS'
- Untick 'Send an email invitation'
- Select the appropriate permission level in the 'Select a permission level' drop down menu, e.g. Contribute or Read.
- Click Share to finish.

14. Refresh your page to see your additional user showing in the permission list.

Exercise 7 – Creating a Sub-site

On occasion you may be required to create a sub-site. Before creating it you should consider carefully whether it is required – for example, could the requirements be met by creating a new document library with specific permissions instead? You will consider the requirements that might be met with a sub-site, and learn how to create one.

1. Return to your site's homepage by clicking Home in the left menu.
2. Click on the cog symbol at the top right of the screen and select 'Site Contents'.
3. Click on New at the top of the page:



4. Choose Subsite from the menu that appears.
5. The 'New SharePoint Site' screen will be displayed:

Rhodri_Gravell EDIT LINKS

Site contents ▸ New SharePoint Site

Home

- Rhodri's Document Library
- Rhodri's Calendar
- Rhodri's Task List

EDIT LINKS

Title and Description

Title:

Description:

Web Site Address

URL name:

Template Selection

Select a language:

Select a template:

- Collaboration
- Enterprise
- Publishing
- Duet Enterprise
- Team site (no Microsoft 365 group)**
- Team site (classic experience)
- Project Site
- Community Site

A site with no connection to a Microsoft 365 Group.

Permissions

You can give permission to access your new site to the same users who have access to this parent site, or you can give permission to a unique set of users.

Note: If you select **Use same permissions as parent site**, one set of user permissions is shared by both sites. Consequently, you cannot change user permissions on your new site unless you are an administrator of this parent site.

User Permissions:

Use same permissions as parent site

Use unique permissions

Navigation Inheritance

Use the top link bar from the parent site?

Yes No

Create Cancel

6. Give your sub-site a Title (e.g. Suzys's Sub-Site) and a Description (e.g. Suzy's Sub-Site made in training session).
7. Give your sub-site a Web Site Address by typing into the box – you just need the end of the web address as it knows the rest e.g. suzy-sub.
8. Click on 'Project Site' in the 'Select a template' box.
9. Choose 'Use unique permissions' for 'User Permissions'.
10. Choose Yes for 'Use the top link bar from the parent site'.
11. Click Create to proceed.
12. You will see the 'Set Up Groups for this Site' page:

Rhodri_Gravell

People and Groups › Set Up Groups for this Site ⓘ


- Home
- Notebook
- Documents
- Tasks
- Calendar
- Site contents
- EDIT LINKS

Visitors to this Site

Visitors can **read** content in the Web site. Create a group of visitors or re-use an existing SharePoint group.

Create a new group Use an existing group

Rhodri_s Sub-Site Visitors

Members of this Site

Members can **contribute** content to the Web site. Create a group of site members or re-use an existing SharePoint group.

Create a new group Use an existing group

Rhodri Gravell (rhg4) (Staff)

Owners of this Site

Owners have **full control** over the Web site. Create a group of owners or re-use an existing SharePoint group.

Create a new group Use an existing group

Rhodri Gravell (rhg4) (Staff)

OK

13. Add a person to your Members group and Owners group

14. Click OK to proceed.

15. You now have a new sub-site which you can set up as you like.