

Training Manual

Basic Concepts:

Exercises

SharePoint 2013 – GTA Platform

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Support: For further assistance, fill out a Support Request at <http://portal.georgia.gov/support>

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How to Use this Guide

These exercises are meant to be used during the Basic Concepts Training session to give you hands-on experience with SharePoint 2013. Your instructor will provide you with the URL, username, and password for the training site you will use for these activities.

Naming: To be able to distinguish the files you're creating from the files of other students, you will be asked to append your initials to the end of the Titles of content you create. For example, John Doe (initials "JD") would name the Site Page in Exercise 1: "About DCH – JD."

Accessing Exercise Files

You will find all the exercise files for this training session at
https://mygta.ga.gov/portal/spsupport/sptraining/SP_Training_Resources

Exercise 1: Overview

1.1 Confirm Browser Version

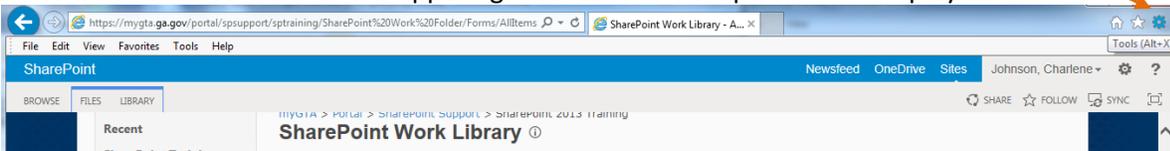
You should confirm that you are using the current version of Internet Explorer: IE11. Prior versions of Internet Explorer are not supported and may yield unsatisfactory results.

Exercise Files:

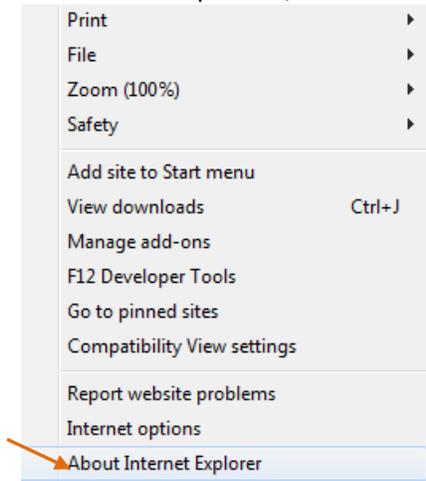
- None

To confirm you are using IE11,

1. Open a browser window using Internet Explorer
2. Click on the **Tools** icon in the upper right corner and a drop down will display



3. On the drop down, click **About Internet Explorer**



4. Confirm that the version you are using is IE11 and close the box



Exercise 2: Access SharePoint

2.1 Login to myGTA

You can log in to access to the myGTA SharePoint site.

Exercise Files:

- None

To login to the SharePoint site,

5. Open a browser window using Explorer 11
6. Enter the URL for myGTA:
<https://mygta.ga.gov>
7. When prompted, enter your SOG login credentials



4. SharePoint will display the myGTA home page

2.2 Log out from myGTA

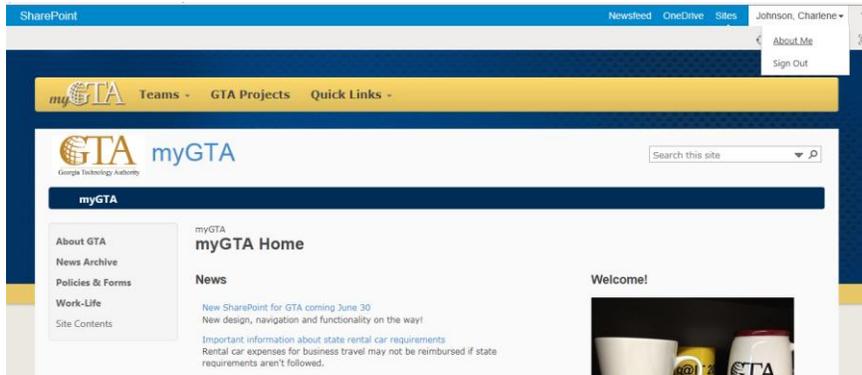
You can log out to close your myGTA session.

Exercise Files:

- None

To log out of a myGTA session in,

1. From any page on the browser, click on your name in the upper right corner and a drop down will display
2. Click **Sign Out**



Exercise 3: Navigation

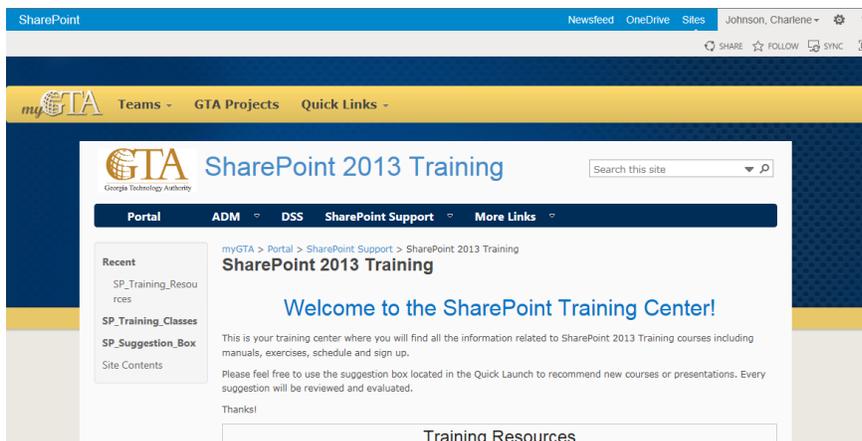
3.1 Top Navigation

You can use top navigation to navigate to various GTA SharePoint sites.

Exercise Files: Portal > SharePoint Support > SharePoint Training

To navigate to the SharePoint training site,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. On the drop down, click **SharePoint Training**
5. SharePoint will display the SharePoint 2013 Training page



3.2 Left Navigation

You can use left navigation to quickly navigate within the site.

For this exercise, start on the SharePoint 2013 Training page and then navigate to the **SharePoint Suggestion Box** using left navigation,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. On the drop down, click **SharePoint Training**
5. SharePoint will display the SharePoint 2013 Training page
6. On the Quick Launch, click **SharePoint Suggestion Box**
7. SharePoint will display the contents of the **SharePoint Suggestion Box**

Exercise 4: Global Navigation

4.1 Navigate Newsfeeds

You can use the SharePoint blue bar for global navigation to **Newsfeeds**

Exercise Files:

- None

To navigate to Newsfeeds from any page,

1. On the SharePoint blue bar, click on **Newsfeeds**
2. SharePoint will display **Newsfeeds** from all the items you are following

You can use the **Follow** exercises that are available in another section of this document to start or stop following items.

4.2 Navigate OneDrive

You can use the SharePoint blue bar for global navigation to **OneDrive**

Exercise Files:

- None

To navigate to **OneDrive** from any page,

1. On the SharePoint blue bar, click on **OneDrive**
2. SharePoint will display all the documents that are stored on **OneDrive**

To add a document to **OneDrive**,

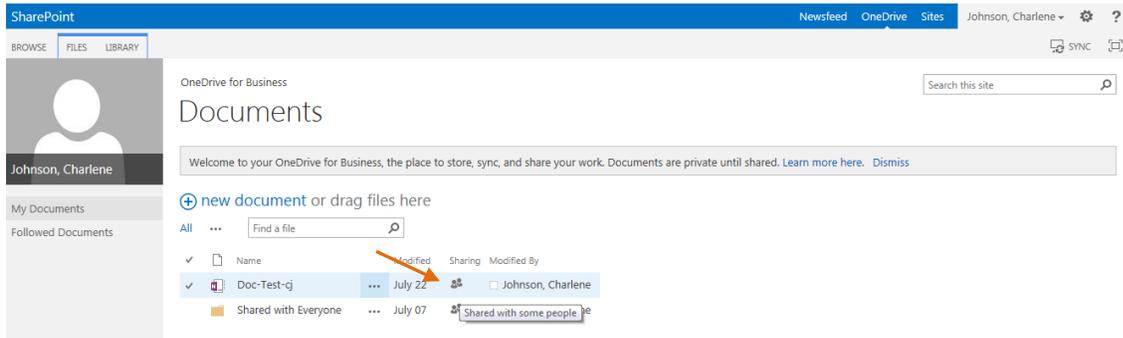
3. In the content area, click **new document** and then click **OneNote notebook**
4. In the **Create a new document** box, enter a **Document Name**

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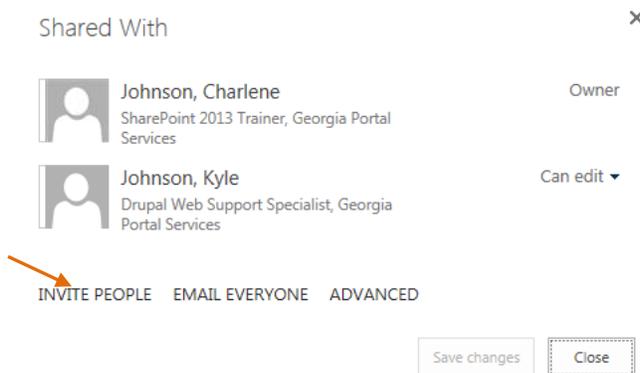
5. Click **OK** and then enter any text in the document
6. When you are finished creating your test document, click **File / Exit**

To share a document in **OneDrive**,

7. To see who you are sharing your document with, click the **Sharing** icon next to your document name



8. Click **INVITE PEOPLE** and then select the name of anyone in the class and enter a personal message
9. When you are finished, click **Share**



10. SharePoint will send an email and share the document with the invited users

To see who the document is shared with,

11. Click the **Sharing** icon next to your document name
12. SharePoint will display the name of users who are sharing the document and you can even send an email to all of them

Exercise 5: Sorts and Filters

5.1 Sort a Library

You can sort a library in either ascending or descending order.

Exercise Files:

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- **Portal > SharePoint Support > SharePoint Job Aids**

To sort a library in ascending order,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. On the Quick Launch, click **SharePoint Job Aids**
5. SharePoint will display a list of the contents of the **SharePoint Job Aids** library
6. On the column heading, click the arrow to the right of **Name** and a drop down list is displayed
7. From the drop down list, click **Ascending**
8. SharePoint will display the list in ascending order of **Name**
9. Then on the column heading, click arrow to the right of **Name** and a drop down list is displayed
10. From the drop down list, click **Descending**
11. SharePoint will display the list in descending order of **Name**

5.2 Filter a Library

You can filter a library to display items that meet the filter criteria.

Exercise Files:

- **Portal > SharePoint Support > SharePoint Job Aids**

To filter a library using two filter criteria,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. On the Quick Launch, click **SharePoint Job Aids**
5. SharePoint will display a list of the contents of the **SharePoint Job Aids** library
6. On the column heading, click the arrow to the right of **TrainingTopic** and a drop down list is displayed
7. From the drop down list, click any two boxes
8. SharePoint will display the items that have the selected values for the **TrainingTopic**

5.3 Sort a List

You can sort a list in either ascending or descending order.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab > SharePoint Training Issues**

To sort a list in descending order,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**

3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. On the Quick Launch, click **SharePoint Training Issues**
6. SharePoint will display the issues list
7. On the column heading, click the arrow to the right of **Issue Status** and a drop down list is displayed
8. From the drop down list, click **Ascending**
9. SharePoint will display the list in ascending order of **Issue Status**
10. Then on the column heading, click arrow to the right of **Issue Status** and a drop down list is displayed
11. From the drop down list, click **Descending**
12. SharePoint will display the list in descending order of **Issue Status**

5.4 Filter a List

You can filter a list to display items that meet the filter criteria.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab > SharePoint Training Issues**

To filter a list using two filter criteria,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. On the Quick Launch, click **SharePoint Training Issues**
6. SharePoint will display the issues list
7. On the column heading, click the arrow to the right of **Issue Status** and a drop down list is displayed
8. From the drop down list, click any boxes
9. SharePoint will display the items that have the selected value for the **Issue Status**

Exercise 6: Work with Searches

6.1 Search a Site

You can search across the entire site.

Exercise Files:

- None

To search the entire site (the default search),

1. Click the GTA logo to navigate to myGTA
2. In the **Search this site** box, enter the search value: Work-life
3. On the right side of the box, click the magnifying glass

4. SharePoint will display all items on the site containing the search criteria: Work-life

6.2 Search People

You can search for people.

Exercise Files:

- None

To search **People**,

1. Click the GTA logo to navigate to myGTA
2. In the **Search this site** box, click the drop down arrow to display the menu of search types
3. Click **People** on the menu
4. Enter the **Search People** value: Johnson
5. On the right side of the box, click the magnifying glass
6. SharePoint will display all people on the site containing the search criteria: Johnson

6.3 Search a Library

You can search across a library.

Exercise Files:

- **Portal > SharePoint Support > SharePoint Job Aids**

To search across the library,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. Navigate to the **SharePoint Support** landing page
4. On the Quick Launch, click **SharePoint Job Aids**
5. In the **Find a file** box, enter the search value: Workflow
6. On the right side of the box, click the magnifying glass
7. SharePoint will display all items on the site containing the search criteria: Workflow

6.4 Search a List

You can search across a list.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab > SharePoint Training Issues**

To search across the list,

1. On the gold bar, click **Teams**

2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. On the Quick Launch, click **SharePoint Training Issues**
6. SharePoint will display the issues list
7. In the **Find an item** box, enter the search value: not
8. On the right side of the box, click the magnifying glass
9. SharePoint will display all items on the list containing the search criteria: not

Exercise 7: View and Edit Documents

7.1 View a pdf Document

You can view pdf documents in a library.

Exercise Files:

- **Portal > SharePoint Support > SharePoint Job Aids**

To view a document,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. Navigate to the **SharePoint Support** landing page
4. On the Quick Launch, click **SharePoint Job Aids**
5. Select any pdf document and click on the ellipses
6. SharePoint will display a pop up menu box
7. From the pop up menu box, click **OPEN**
8. SharePoint will display the pdf document

7.2 View a Word Document

You can view Word documents in a library.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**

To view a Word document,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. In the **Documents** list, select any document and click on the ellipses
6. SharePoint will display a pop up menu box with a preview of the Word document and another set of ellipses
7. From the pop up menu box, click the ellipses

8. SharePoint will display a drop down
9. From the drop down, click **View in Browser**
10. SharePoint will display the document in Word

7.3 Check out and edit a Document

You can check out a document and then edit it.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Document Name: Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

Note: Not all users will have permission to check out / check in a document.

Also check out / check in may be a requirement for some libraries.

To check out a document and edit it,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. In the **Documents** list, select **Sample Doc xx** and click on the ellipses
6. SharePoint will display a pop up menu box with a preview of the Word document and another set of ellipses
7. From the pop up menu box, click the ellipses
8. SharePoint will display a drop down
9. From the drop down , click **Check Out**
10. SharePoint will redisplay the library and a green icon  will indicate that the document is checked out to you.
11. Select **Sample Doc xx** that is checked out to you and click on the ellipses
12. SharePoint will display a pop up menu box
13. From the menu box, click **EDIT**
Note: You may be asked to enter your SOG credentials.
14. SharePoint will display the document in Word and you can edit it and then save the changes.

7.4 Check in a Document

You can check in a document after you have finished editing it.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Document Name: Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

Note: If you are already editing the document, go to step 10.

To check in a document after editing it,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. In the **Documents** list, select **Sample Doc xx** that is checked out to you (green icon ) and click **EDIT**
6. SharePoint will display the document in Word and you can edit it
7. From the Word tool bar, click **File**
8. Click **Check In**
9. SharePoint will display the Check in box
10. Enter meaningful comments regarding the changes that were made
11. Click **OK**
12. From the Word tool bar, click **File / Exit**
13. In the **Save Changes** box that is displayed, click **Yes**.
14. In the **Check in** box that is displayed, click **Yes**.
15. In the **Version Comments** box that is displayed, enter comments about the changes that were made.
16. SharePoint will display the library, the green icon  will not display next to **Sample Doc xx** because the document has been checked in. Your changes will be available for all users.

7.5 Delete a Document

You can delete a document and SharePoint will move it to the Recycle Bin.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Document Name: Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

Note: Not all users will have permission to delete/ restore a document.

To delete a document,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. In the **Documents** list, select **Sample Doc xx** which is the document you want to delete and click on the ellipses
6. SharePoint will display a pop up menu box with a preview of the Word document and another set of ellipses
7. From the pop up menu box, click the ellipses
8. SharePoint will display a drop down

9. From the drop down, click **Delete**
10. SharePoint will display the confirmation box
11. Click **OK**
12. SharePoint will move the document to the Recycle Bin

7.6 Restore a Document

You can restore a document and SharePoint will move it back to the library from the Recycle Bin.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Document Name: Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

Note: Not all users will have permission to delete/ restore a document.

To restore a document,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. In the **Quick Launch**, click **Site Contents**
6. Click the **RECYCLE BIN** on the right side of the header
7. SharePoint will display the contents of the Recycle Bin
8. Click the box next to the document you want to restore: **Sample Doc xx**
9. Click **Restore Selection** on the left side of the header
10. SharePoint will display the confirmation box
11. Click **OK**
12. SharePoint will move the document back to the library from the Recycle Bin

Exercise 8: Work with Document Properties

8.1 View Document Properties

You can view the properties of a document, e.g. the title, the date the document was created, the version, etc.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Document Name: Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

To view the document properties,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**

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3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. Select **Sample Doc xx** and click on the ellipses
6. SharePoint will display a pop up menu box
7. From the pop up menu box, click the ellipses
8. SharePoint will display a drop down
9. From the drop down, click **View Properties**
10. SharePoint will display the properties of the document

8.2 Rename a Document

You can rename a document.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Name: Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

To rename a document,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. Select **Sample Doc xx** and click on the ellipses
6. SharePoint will display a pop up menu box
7. From the pop up menu box, click the ellipses
8. SharePoint will display a drop down
9. From the drop down, click **Edit Properties**
10. SharePoint will display the properties of the document and the properties can be edited
11. Change the **Name** of the document by adding your initials to the current document name
12. Click **Save**
13. SharePoint will change the **Name** of the document and also update the Modified and Modified By information.

Note. When you are finished with this exercise, rename the document back to the original name (remove your initials from the name): **Sample Doc xx**

8.3 View Version History

You can confirm the version number and the version history of a document.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

To view the version history of a document,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. Select **Sample Doc xx** and click on the ellipses
6. SharePoint will display a pop up menu box
7. From the pop up menu box, click the ellipses
8. SharePoint will display a drop down
9. From the drop down, click **Version History**
10. SharePoint will display the version history of the document

8.4 Restore a previous Version

You can restore a document from a previous version.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

Note: You must check out a document before you can restore the document from a previous version. When you are finished with making your changes, you must check in the document to make your changes available to users.

To restore a document from a previous version,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. Select **Sample Doc xx** and click on the ellipses
6. SharePoint will display a pop up menu box
7. From the pop up menu box, click the ellipses
8. SharePoint will display a drop down
9. From the drop down, click **Version History**
10. SharePoint will display the version history of the document
11. Hover over the **Modified** date & time for version 1.0 of the document and then click on the drop down arrow
12. SharePoint will display a drop down
13. Select **Restore** on the drop down list
14. SharePoint will display the confirmation box
15. Click **OK**
16. SharePoint will save a new version of the document which is a copy of the specified version: 01.

Exercise 9: Follow Sites

9.1 Follow a Site

You can follow a site and SharePoint will update your Newsfeed when posts are made to the site's Newsfeed.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**

To follow a site,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. From the SharePoint tabs on the upper right corner of the site (just below your name), click **FOLLOW**
6. SharePoint will update your newsfeed when a post is made to the site

9.2 Post to a Site

You can post to a site.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**

To post to a site,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. Enter text in the **Newsfeed** text box
6. Click **Post** below the text box
7. SharePoint will post your newsfeed

9.3 View the Posts

You can view posts that were made to a site.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**

To view the posts to a site,

1. To setup for this exercise, post to the site

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- a. On the gold bar, click **Teams**
 - b. On the drop down, click **Portal**
 - c. On the blue bar, click **SharePoint Support**
 - d. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
 - e. Enter text in the **Newsfeed** text box
 - f. Click **Post** below the text box
2. From the SharePoint tabs on the upper right corner of the site (just below your name), click **NEWSFEED**
 3. SharePoint will display a page with the **Newsfeed** posts

9.4 Navigate to a Site you are following

To navigate to a site you are following,

1. From the SharePoint tabs on the upper right corner of the page (just below your name), click **Sites**
2. SharePoint will display the title and the URL of all the sites you are following
3. Click on the title of the site you want to return to
4. SharePoint will display the landing page for the chosen site

Exercise 10: Follow Documents

10.1 Follow a Document

You can follow a document and SharePoint will notify you when changes to the document have been saved.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Document Name: Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

To follow a document,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. Select the **Sample Doc xx** that corresponds to your student number and click on the ellipses next to the document name
6. SharePoint will display a pop up menu
7. From the pop up menu, click **FOLLOW**
8. SharePoint will update your newsfeed whenever changes to the document are saved

10.2 View a Newsfeed when a Document is changed

You can view your newsfeed when a document you are following was changed.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Document Name: Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

To view the newsfeed when a document you are following was changed,

1. To setup for this exercise, change a document that is followed by another user
 - a. On the gold bar, click **Teams**
 - b. On the drop down, click **Portal**
 - c. On the blue bar, click **SharePoint Support**
 - d. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
 - e. Select the **Sample Doc (xx+1)** that corresponds to the next student number and click on the ellipses next to the document name
 - f. Edit the document and save the changes
2. From the SharePoint tabs on the upper right corner of the site (just below your name), click **NEWSFEED**
3. SharePoint will display a page with the **Newsfeed** posts
4. SharePoint will display a page with the **Following** content area that will display the name of the document that was changed and the user id of the user who made the changes

10.3 Stop Following a Document

You can stop following a document.

Exercise Files:

- **None**

To stop following a document,

1. From the SharePoint tabs on the upper right corner of the site (just below your name), click **NEWSFEED**
2. SharePoint will display a page with the **Newsfeed** posts
3. SharePoint will display a page with the **I'm following** content area that will display the count of the documents that you are following
4. From the **I'm following** column, click on the number above the **documents** field
5. SharePoint will display a list of all the document you are following
6. Click **Stop following** under the document you want to stop following

Exercise 11: Add Library Documents

11.1 Drag and Drop Documents

You can drag and drop one or more documents into a library.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
 - **Document Name: Sandbox-library**
- **An existing file on your laptop file or create a new file for testing**

To drag and drop a document into a library,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sandbox-library**
6. Resize the screen and open explorer to view your documents on your laptop
7. Select one or more documents from your laptop and drag them to the library in the **drag files here** section
8. SharePoint will copy each selected document that you dragged from your laptop to the library

11.2 Upload a Document

You can upload a document into a library.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
 - **Document Name: Sandbox-library**
- **An existing file on your laptop file or create a new file for testing**

To upload a document into a library,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sandbox-library**
6. In the content area, click **new document**
7. SharePoint will display a drop down
8. Click **UPLOAD EXISTING FILE**
9. Browse your laptop and select a document to upload and then click **OK**
10. SharePoint will copy the selected document from your desktop to the library

11.3 Create a Document from SharePoint

You can create a document from SharePoint.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
 - **Document Name: Sandbox-library**
- **An existing file on your laptop file or create a new file for testing**

To create a document from SharePoint,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sandbox-library**
6. In the content area, click **new document**
7. SharePoint will display a drop down
8. Click **Word document** or **Excel workbook**
9. SharePoint will open a blank document using the web version of Microsoft Office
10. Edit the blank document
11. Click **File / Exit** and then click **Save** to save the document
12. SharePoint will save the document in the library

Exercise 12: Work with Lists

You can add items to lists. You can also customize a list by sorting or filtering the view.

12.1 Add List Items

You can add items to a list.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
 - **Document Name: Sandbox-list**

To add an item to a list,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sandbox-list**
6. In the content area, click **new item**
7. SharePoint will display a form for data entry
8. When the form is displayed, enter the requested data
9. Click **Save**

10. SharePoint will save the new item to the list

12.2 Sort List Items

You can sort a list in ascending or descending order.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
 - **Document Name: Sandbox-list**

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sandbox-list**
6. Click any header
7. SharePoint will sort the list (ascending or descending) using the header

12.3 Filter List Items

You can filter a list using one or more values.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
 - **Document Name: Sandbox-list**

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sandbox-list**
6. In the header, hover over any header and the drop down will be displayed
7. Select one or more values from the drop down list
8. SharePoint will display the items specified by the filter
9. In the header, hover over another header and the drop down will be displayed
10. Select one or more values from the drop down
11. SharePoint will display the items specified by all the filters

12.4 Spreadsheet View

You can edit a list using a spreadsheet view.

Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
 - **Document Name: Sandbox-list**

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sandbox-list**
6. In the content area, click **edit this list**
7. SharePoint will display the list in a spreadsheet view
8. In the spreadsheet view, edit the item you entered or add more entries to the list
9. In the content area, click stop **editing this list**
10. SharePoint will display the list in a standard view