ARM SharePoint 2013 Learning Modules

Overview

The goal of these learning modules is to help you to become familiar with how ARM uses certain SharePoint 2013 features. In each of the learning modules, there will be "Practice Action Challenge" activities, to apply what you have learned.

The Sandbox ARM Home site has:

1. Links similar to the actual ARM Home SharePoint site. The four active links in the left column under the Rulemaking and Exemptions header allow you to practice working in SharePoint 2013 environment without worrying about messing up live content.
2. Short modules, which can be viewed at any time. ARM recommends for you to assess the modules in numerical order; however, these modules are set up for you to select the particular topic that you need to practice. These are voluntary learning modules.

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Module 1: Vertical Navigations
Learn to use vertical navigations to view, store, or edit data.

Module 2: Using the Ribbon
Learn to use the ribbon for commands placed together in groups.

Module 3: Using Ellipsis
Learn to use the ellipsis [...] to display a menu of commands.

Module 4: Editing Data
Learn to edit the data in a list item or a document's properties.

Module 5: Using Views
Learn to use views to organize data or display specific content.

Index
Summary

Active vertical navigations in list and library applications (apps) help to view, store, or edit data.
1. List App Vertical Navigations

A list app usually has five vertical navigations to help you create, update, and collaborate on data.

Navigations
1a. Tab
1b. Quick Links
1c. Title
1d. New/Edit
1e. View
Begin on the Sandbox ARM Home webpage

Select the Sandbox Business Plan link
1a. Tab navigation

ITEMS and LIST tabs. These tabs give you a ribbon of commands. Learn about the ribbon in Module 2.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Approval</td>
<td>AOA, or DPR Director as appropriate, provides final FAA approval for 85% of rules within 90 days of the Council-approved schedule date. (For harmonized rules, AOA has delegated signature authority to AIR-1.) <strong>AVS Core</strong></td>
</tr>
<tr>
<td>Process Exemptions</td>
<td>With the exception of petitions for reconsiderations and those petitions for exemption under Section 333, process (grant, deny, or close out) 75% of the exemption requests within 120 days of receipt during the current fiscal year processing cycle and within an average processing time of 90 days. (June 2, 2016 - June 2, 2017) <strong>AVS Core</strong></td>
</tr>
</tbody>
</table>
1b. Quick Links navigation

Quick links to other web pages linked to the ARM Home web site
1c. Title navigation

Link to the list’s web page
1d. New/Edit navigation

Add a new item or edit the list
Learn about how to edit a list item in Module 4.
1e. Views navigation

List of views and a search box
Learn about views in Module 5.
Your Practice Challenge

From the Sandbox ARM Business Plan, add a new item to the list using the New/Edit navigation, and enter data into the fields.
2. Library App Vertical Navigations

A library app usually has five action navigations to help you to upload, create, update, and collaborate on files (documents) with team members.
Begin on the Sandbox ARM Home

Select the Sandbox Rulemaking Metric link
2a. Tab navigation

FILES and LIBRARY tabs. These tabs give you a ribbon of commands. Learn about the ribbon in Module 2.
2b. Quick Links navigation

Quick links to other web pages linked to the ARM Home web site.
2c. Title navigation

Link to the library’s web page
2d. New Document navigation

Add a new document or drag files into the library
2e. Views navigation

List of views and a search box
Learn about views in Module 5.
Your Practice Challenge

From the Sandbox Rulemaking Metric, add a document to this library using the New Document Navigation, and enter data into the fields.
List and Library Apps

• If you have any questions, contact ARM’s SharePoint Administrator.

• You can enjoy the PowerPoint or finding aid in the ARM SharePoint 2013 Learning Modules.
Module 1: Using Vertical Navigations in SharePoint 2013

Summary: Vertical navigations in list and library applications (apps) help you view, store, or edit data.

1. List Vertical Navigations
A list usually has five vertical navigations to help you to create, update, and collaborate on data. For an example of a list app’s navigations, we will begin on the Sandbox ARM Home. Then select the Sandbox ARM Business Plan link. Starting from the top of the page:

1a. Tab navigation has two tabs: ITEMS and LIST. These tabs give you a ribbon of commands.
   - Learn about the ribbon in Module 2.

1b. Quick Links navigation has quick links to other web pages linked to the ARM Home web site.

1c. Title navigation has a link to the list’s web page.

1d. New/Edit navigation gives you the opportunity to add a new item or edit this list.
   - Learn about how to edit a list item in Module 4.

1e. View navigation gives a list of views and a search box.
   - Learn about views in Module 5.

Your Practice Challenge: From the Sandbox ARM Business Plan, add a new item to this list using the Edit navigation, and enter data into the fields.

2. Library Vertical Navigations
A library usually has five vertical navigations to help you to upload, create, update, and collaborate on files (documents) with team members. For an example of a library app’s navigations return to the Sandbox ARM Home. Then select the Sandbox Rulemaking Metric link. Starting from the top of the page:

2a. Tab navigation has two tabs: FILES and LIBRARY. These tabs give you a ribbon of commands.
   - Learn about the ribbon in Module 2.

2b. Quick Links navigation has quick links to other web pages linked to the ARM Home web site.

2c. Title navigation has a link to the library’s web page.

2d. New Document navigation gives you the opportunity to add a new document or drag files into the library.

2e. View navigation gives a list of views and a search box.
   - Learn about views in the Module 5.

Your Practice Challenge: From the Sandbox Rulemaking Metric, add a document to this library using the New Document navigation, and enter data into the fields.

This is the basic information about lists and libraries to help you navigate the ARM’s SharePoint sites. If you have any questions, contact ARM’s SharePoint Administrator. You can enjoy the PowerPoint or the finding aid in the ARM SharePoint 2013 Learning Modules.
Summary

The ribbon has commands placed together in groups.
1. LIST Tab navigation

The list Tab navigation (referenced in Module 1) has two primary tabs:

1a. ITEMS, and
1b. LIST

Both of these tabs open to a ribbon of commands in color (if you have access) or grayed out (if you don’t have permissions).
1a. Ribbon from ITEMS tab

<table>
<thead>
<tr>
<th>Group</th>
<th>Command(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>New Item and New Folder</td>
</tr>
<tr>
<td>Manage</td>
<td>View Item, Edit Item, Version History, Shared</td>
</tr>
<tr>
<td></td>
<td>With, and Delete Item</td>
</tr>
<tr>
<td>Actions</td>
<td>Attach File</td>
</tr>
<tr>
<td>Share &amp; Track</td>
<td>Alert Me</td>
</tr>
<tr>
<td>Workflows</td>
<td>Workflow and Approve/Reject</td>
</tr>
</tbody>
</table>
New group

New Item and New Folder commands
Manage group

View Item, Edit Item, Version History, Shared With, and Delete Item commands
Actions group

Attach File command

AOA, or OPR Director as appropriate, provides final FAA approval for 85% of rules within 90 days of the Council-approved schedule date. (For harmonized rules, AGA has delegated signature authority to AIR-1.) **AVS Core**

With the exception of petitions for reconsiderations and those petitions for exemption under Section 333, process (grant, deny, or close out) 75% of the exemption requests within 120 days of receipt during the current fiscal year processing cycle and within an average processing time of 90 days. (June 2, 2016 - June 2, 2017) **AVS Core**
Share & Track group

Alert Me command
Tags and Notes group

Tags & Notes command

<table>
<thead>
<tr>
<th>Title</th>
<th>Subactivity</th>
<th>Target</th>
<th>OA/OPR</th>
<th>Issue Status</th>
<th>Status Indicator</th>
<th>% Complete</th>
<th>Due Date</th>
<th>Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Approval</td>
<td>1</td>
<td>AOA, or OPR Director as appropriate, provides final FAA approval for 85% of rules within 90 days of the Council-approved schedule date. (For harmonized rules, AOA has delegated signature authority to AIR-1.) AVS Core.</td>
<td>Every Quarter</td>
<td>Active</td>
<td>Green - On time</td>
<td>75</td>
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<td></td>
</tr>
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<td>Every Quarter</td>
<td></td>
</tr>
</tbody>
</table>
Workflows group

Workflow and Approve/Reject commands
### 1b. Ribbon from LIST tab

**Group** | **Command(s)**
--- | ---
**View Format** | View and Quick Edit
**Manage Views** | Create View, Modify View, Create Column, Navigate Up, and Current View
**Tags and Notes** | Tags & Notes
**Share & Track** | Email a Link, Alert Me, and RSS Feed
**Connect & Export** | Connect to Outlook, Export to Excel, Open with Access, and Open with Project
**Customize List** | Customize Form, Form Web Parts, Edit List, New Quick Step
**Settings** | List Settings, Shared With, and Workflow Settings
View Format group

View and Quick Edit commands

[Image of a screenshot showing a view format group with options like Modify View, Current View, and a list of items with columns for Title, Subactivity, Target, Issue Status, Status Indicator, % Complete, Due Date, and Assigned To. There are entries for Rule Approval and Process Exemptions with details about the process and timelines.]
Manage Views group

Create View, Modify View, Create column, Navigate Up, and Current View commands
Tags and Notes group

Tags & Notes command

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Share & Track group

Email a Link, Alert Me, and RSS feed commands
Connect & Export group

Connect to Outlook, Export to Excel, Open with Access, and Open with Project commands
Settings group

List Settings, Shared With, and Workflow Settings commands
Your Practice Challenge

From the Sandbox ARM Business Plan, use the ITEMS tab ribbon to send and delete an alert for this page using the Alert Me command.
2. Library Tab navigation

The library Tab navigation (referenced in Module 1) has two primary tabs:

2a. FILES, and
2b. LIBRARY

Both of these tabs open to a ribbon of commands in color (if you have access) or grayed out (if you don’t have permissions).
2a. Ribbon from FILES tab

<table>
<thead>
<tr>
<th>Group</th>
<th>Command(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open &amp; Check Out</td>
<td>Edit Document, Check Out, Check In, and Discard Check Out</td>
</tr>
<tr>
<td>Manage</td>
<td>View Properties, Edit Properties, Version History, Shared With, and Delete Document</td>
</tr>
<tr>
<td>Share &amp; Track</td>
<td>Share, Alert Me, and Follow</td>
</tr>
<tr>
<td>Workflows</td>
<td>Workflow, Publish, Unpublish, Approve/Reject/Cancel Approval</td>
</tr>
<tr>
<td>Tags and Notes</td>
<td>Tags &amp; Notes</td>
</tr>
</tbody>
</table>
New Document group

New Document, Upload Document, and New Folder commands
Open & Check Out group

Edit Document, Check Out, Check In, and Discard Check Out commands

**WARNING**
This is a Federal Aviation Administration (FAA) computer system. FAA systems, including all related equipment, networks, and network devices (specifically including Internet access) are provided for the processing of official U.S. Government information. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action. All information on this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including criminal investigations. Access or use of this computer system by any person, whether authorized or unauthorized, constitutes consent to these terms.
Manage group

View Properties, Edit Properties, Version History, Shared With, and Delete Document commands
Share & Track group
Share, Alert Me and Follow commands
Copies group

Download a Copy, Send To, Manage Copies, and Go To Source command
Workflows group

Workflow, Publish, Unpublish, Approve/Reject/Cancel Approval commands
Tags and Notes group

Tags & Notes command
2b. Ribbon from LIBRARY tab

<table>
<thead>
<tr>
<th>Group</th>
<th>Command(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Format</td>
<td>View and Quick Edit</td>
</tr>
<tr>
<td>Manage Views</td>
<td>Create View, Modify View, Create Column, Navigate Up, and Current View</td>
</tr>
<tr>
<td>Tags and Notes</td>
<td>Tags &amp; Notes</td>
</tr>
<tr>
<td>Share &amp; Track</td>
<td>Email a Link, Alert Me, and RSS Feed</td>
</tr>
<tr>
<td>Connect &amp; Export</td>
<td>Connect to Outlook, Connect to Office, Export to Excel, and Open with Explorer</td>
</tr>
<tr>
<td>Customize List</td>
<td>Form Web Parts, Edit Library, and New Quick Step</td>
</tr>
<tr>
<td>Settings</td>
<td>List Settings, Shared With, and Workflow Settings</td>
</tr>
</tbody>
</table>
View Format group

View and Quick Edit command
Manage Views group

Create View, Modify View, Create column, Navigate Up and Current View commands
Tags and Notes group

Tags & Notes command
Share & Track group

Email a Link, Alert Me, and RSS Feed commands
Connect & Export group

Connect to Outlook, Connect to Office, Export to Excel, and Open with Explorer commands
Customize Library group

Form Web parts, Edit Library, and New Quick Step commands
Settings group

List Settings, Shared With, and Workflow Settings commands
Your Practice Challenge

From the Sandbox Rulemaking Metric, use the LIBRARY tab ribbon to change the “list name and description” using the List Settings command.
Using the Ribbon

• If you have any questions, contact ARM’s SharePoint Administrator.

• You can enjoy the PowerPoint or finding aid in the ARM SharePoint 2013 Learning Modules.
Module 2: Using the Ribbon in SharePoint 2013

Summary: The ribbon has commands placed together in groups.

1. ITEMS and LIST tab ribbons

The list Tab navigation (discussed in Module 1) has two primary tabs: ITEMS and LIST. Both of these tabs open to a ribbon of commands in color (if you have access) or grayed out (if you don’t have permissions). SharePoint tries to provide optional ways to access various functions. Several of the ribbon commands are in certain ellipsis menus. (Learn more about ellipsis in Module 3.) For an example of the list app ribbons begin on Sandbox ARM Home. Then select Sandbox ARM Business Plan.

Table 1a: ITEMS tab – This ribbon has the following groups with associated commands, to include:

<table>
<thead>
<tr>
<th>Group</th>
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</tr>
</thead>
<tbody>
<tr>
<td>New</td>
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<td>Alert Me</td>
</tr>
<tr>
<td>Workflows</td>
<td>Workflow and Approve/Reject</td>
</tr>
</tbody>
</table>

Table 1b: LIST tab – This ribbon has the following groups with associated commands, to include:

<table>
<thead>
<tr>
<th>Group</th>
<th>Command(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Format</td>
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<tr>
<td>Customize List</td>
<td>Customize Form, Form Web Parts, Edit List, New Quick Step</td>
</tr>
<tr>
<td>Settings</td>
<td>List Settings, Shared With, and Workflow Settings</td>
</tr>
</tbody>
</table>

Your Practice Challenge: From the Sandbox ARM Business Plan, use the ITEMS tab ribbon to send and delete an alert for this page using the Alert Me command.

2. FILES and LIBRARY tab ribbons

The library Tab navigation (discussed in Module 1) has two primary tabs: FILES and LIBRARY. Both of these tabs open to a ribbon of commands placed together in groups. These commands will be in color (if you have access) or grayed out (if you don’t have permissions). SharePoint tries to provide optional ways to access various functions. Several of the ribbon commands are in certain ellipsis menus. (Learn more about ellipsis in Module 3.) For an example of the library app ribbons begin on Sandbox ARM Home. Then select Sandbox Rulemaking Metric.
Table 2a: FILES tab – This ribbon has the following groups with associated commands, to include:

<table>
<thead>
<tr>
<th>Group</th>
<th>Command(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open &amp; Check Out</td>
<td>Edit Document, Check Out, Check In, and Discard Check Out</td>
</tr>
<tr>
<td>Manage</td>
<td>View Properties, Edit Properties, Version History, Shared With, and Delete Document</td>
</tr>
<tr>
<td>Share &amp; Track</td>
<td>Share, Alert Me, and Follow</td>
</tr>
<tr>
<td>Workflows</td>
<td>Workflow, Publish, Unpublish, Approve/Reject/Cancel Approval</td>
</tr>
<tr>
<td>Tags and Notes</td>
<td>Tags &amp; Notes</td>
</tr>
</tbody>
</table>

Table 2b: This ribbon has the following groups with associated commands, to include:

<table>
<thead>
<tr>
<th>Group</th>
<th>Command(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Format</td>
<td>View and Quick Edit</td>
</tr>
<tr>
<td>Manage Views</td>
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<td>Settings</td>
<td>List Settings, Shared With, and Workflow Settings</td>
</tr>
</tbody>
</table>

Your Practice Challenge: From the Sandbox Rulemaking Metric, use the LIBRARY tab ribbon to change the “list name and description” using the List Settings command.

This is the basic information about the ribbons in list and library apps to help you navigate the ARM’s SharePoint sites. If you have any questions, contact ARM’s SharePoint Administrator. You can enjoy the PowerPoint or the finding aid in the ARM SharePoint 2013 Learning Modules.
Navigating SharePoint 2013

Module 3: Using Ellipsis

Presented to: Office of Rulemaking
By: ARM SharePoint Administrator
Date: Determined by ARM employee
Summary

An ellipsis [...] displays a menu of options.

This module will discuss the ellipsis menu(s) linked to the title of a:

• List item, or
• document.
Begin with the Sandbox ARM Home webpage

Select the Sandbox Business Plan link
1. Ellipsis Menu for List Items

Select the ellipsis menu linked to the title of a list item.
Menu of commands:

1a. View Item
1b. Edit Item
1c. Version History
1d. Compliance Details
1e. Workflows
1f. Alert Me
1g. Shared With
1h. Delete
1a. View Item command

Allows you to view the content associated with the list entry
1b. Edit Item command

Allows you to edit the data in the associated content with the list entry.
1c. Version History command

Provides a list of the changes to the list entry
1d. Compliance Details command
Provides the record retention, if applicable
1e. Workflows command

Allows you to start a new workflow, or select a created workflow
1f. Alert Me command

Allows you to receive notification when a list has changed
1g. Shared With command

Allows you to forward the list to a coworker
1h. Delete Item command

Removes the list entry from the library
Your Practice Challenge

On the Sandbox ARM Business Plan, use an ellipsis menu to view the version history.
2. Ellipsis Menus for Library Documents

This section will discuss the two ellipsis menus linked to a document.
Return to the Sandbox ARM Home webpage

Select the Sandbox Rulemaking Metric
First ellipsis

Open the “Approved” group. Select the first ellipsis next to the document’s title.
1st Menu of commands:

2a. Edit
2b. Share
2c. Follow
2d. (second ellipsis)
1a. Edit command

Allows you to edit the document
1b. Share command

Allows you to forward the document to a coworker
1c. Follow command

Allows you to view new activities about the document in your newsfeed on My Sites
1d. 2nd Ellipsis

Provides another menu of commands
2nd Ellipsis Menu of commands

2e. View Properties
2f. Edit Properties
2g. Check Out
2h. Check In
• This option appears in the menu after a document is checked out
2i. Version History
2j. Compliance Details
2k. Workflows
2l. Download a copy
2m. Shared With
2n. Delete
2e. View Properties command

Allows you to view content associated with the document.
2f. Edit Properties command

Allows you to edit content associated with the document
2g. Check Out command

Allows you to edit a document, and not allow anyone else to edit.
2h. Check In command

Allows others to edit the document after you have checked it out
2i. Version History command

Provides a list of changes to the document
2j. **Compliance Details command**

Provides a list of changes to the document.
2k. Workflows command

Allows you to start or create a new workflow
21. Download a Copy command

Allows you to store a copy of the document offline
2m. Shared With command

Allows you to forward the document to a coworker
2n. Delete command

Removes the document from the library
Your Practice Challenge

On the Sandbox Rulemaking Metric, use an ellipsis to view the document’s properties.
Using Ellipsis

• If you have any questions, contact ARM’s SharePoint Administrator.
• You can enjoy the PowerPoint or finding aid in the ARM SharePoint 2013 Learning Modules.
Module 3: Using Ellipsis in SharePoint 2013

Summary: An ellipsis [...] displays a menu of options. This module will discuss the ellipsis menu(s) linked to the title of a list item or document.

1. Ellipsis Menu for List Item
For this module, we will begin on the Sandbox ARM Home. To view an example of an ellipsis in a list, select Sandbox ARM Business Plan. The ellipsis linked to the item’s title opens a menu of commands:

1a. View Item – Allows you to view the content associated with the list entry
1b. Edit Item – Allows you to edit the data in the associated content with the list entry
1c. Version History – Provides a list of the changes to the list entry
1d. Compliance Details – Provides the record retention, if applicable
1e. Workflows – Allows you to start a new workflow, or select a created workflow
1f. Alert Me – Allows you to receive notification when a list has changed
1g. Shared With – Allows you to forward the list to a coworker
1h. Delete Item – Removes the list entry from the library

Your Practice Challenge: On the Sandbox ARM Business Plan, use an ellipsis menu to view the version history. By selecting Sandbox ARM Home in the quick links, we’ll return to the home page.

2. Ellipsis Menus for Library Documents
For documents, there is often a tiered set of ellipsis. When you select the first ellipsis linked to the document’s title, there will be a new menu, which include second ellipsis for more options. To view an example of an ellipsis for a library document, select Sandbox ARM Home in the quick links, then select the Sandbox Rulemaking Metric. Open the “Approved” group, and select the first ellipsis, which opens a menu of commands:

2a. Edit – Allows you to edit the document
2b. Share – Allows you to forward the document to a coworker
2c. Follow – Allows you to view new activities about the document in your newsfeed on My Sites
2d. (second ellipsis) – Provides another menu

Select the second ellipsis to open another menu of options:

2e. View Properties – Allows you to view content associated with the document
2f. Edit Properties – Allows you to edit the content associated with the document
2g. Check Out – Allows you edit a document, and not allow anyone else to edit
2h. Check In – Allows others to edit the document after you have checked it out
   • This option appears in the menu after a document is checked out
2i. Version History – Provides a list of changes to the document
2j. Compliance Details – Provides the record retention, if applicable
2k. Workflows – Allows you to start or create a new workflow
2l. Download a copy – Allows you to store a copy of the document offline
2m. Shared With – Allows you to forward the document to a coworker
2n. Delete – Removes the document from the library

Your Practice Challenge: On the Sandbox Rulemaking Metric, use an ellipsis to view document’s properties.

This is the basic information about the ellipsis to help you navigate the ARM’s SharePoint sites. If you have any questions, contact ARM’s SharePoint Administrator. You can enjoy the PowerPoint or the finding aid in the ARM SharePoint 2013 Learning Modules.
Navigating SharePoint 2013

Module 4: Editing data in a list or a library

Presented to: Office of Rulemaking
By: ARM SharePoint Administrator
Date: Determined by ARM employee
Summary

ARM often has to edit a list item or a library’s document properties by adding or deleting data.
Edit a List Item

There are many ways to edit a list. This module will focus on three primary ways, using the:

1. Edit link
2. ITEMS tab
3. LIST tab
We will begin on the Sandbox ARM Home webpage

Select the Sandbox ARM Business Plan
1. Using the “edit” link

In the New/Edit navigation, select the edit link.
Learn about navigations in Module 1.
List changes from standard style to datasheet style

Add, edit, or delete item data
Select “Stop” link

In the New/Edit navigation
Learn about navigations in Module 1.
2. Using the ITEMS tab

Select the items row (it will turn blue)

<table>
<thead>
<tr>
<th>No.</th>
<th>Title</th>
<th>Active</th>
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<td>Green - On Time</td>
<td>Every Quarter</td>
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</table>
Select the ITEMS tab

In the Tab navigation
Learn about navigations in Module 1.
Select “Edit Item” command

In the “Manage” group from the ribbon.
Learn about the ribbon in Module 2.
Item changes to show editable fields

Add, edit, or delete item data
Select “Save” command

In the Commit group
3. Using the LIST tab

In the Tab navigation
Learn about navigations in Module 1.
Select “Quick Edit” command

In the “View Format” group from the ribbon
Learn about the ribbon in Module 2.
List changes from standard style to datasheet style

Add, edit, or delete item data
Select “Stop” link

In the New/Edit navigation

Learn about navigations in Module 1.
Your Practice Challenge

From the Sandbox ARM Business Plan, edit a list item using the Edit Item tab.
Bonus Challenge

From the Sandbox Special Projects there are six apps, to include: All Documents (one document app), Announcements, Milestones, Team Members, and Links (four list apps), and Calendar (one calendar app). Find a list app and enter a list item using the New Item command in the New/Edit navigation.
Edit document properties

There are many ways to edit a document’s properties. This module will focus on two primary ways, using the:

1. Ellipsis
2. FILES tab
Return to the Sandbox ARM Home webpage

Select the Sandbox Rulemaking Metric
1. Using the ellipsis

Open the “Approved” group. Select the ellipsis next to the document’s title. Learn about ellipsis in Module 3.
In the next menu, select the second ellipsis
Select “Edit Properties” command
Item changes to show editable fields

Add, edit, or delete item data
Select “Save” command

From the Commit group
2. Using the FILES tab

Select the document’s row. (It will turn blue.)
Select the FILES tab

From the Tab navigation. Learn about navigations in Module 1.
Select “Edit Properties” command

In the “Manage” group from the ribbon.
Learn about the ribbon in Module 2.
Item changes to show editable fields

Add, edit, or delete item data
Select “Save” command

From the commit group
Your Practice Challenge

From the Sandbox Rulemaking Metric, edit the document properties using the Files tab.
Bonus Challenge

From the Sandbox Special Projects there are six apps, to include: All Documents (one document app), Announcements, Milestones, Team Members, and Links (four list apps), and Calendar (one calendar app). Find the document app and add a new document using the New Document command in the New/Edit navigation.
Editing data in a list or library

• If you have any questions, contact ARM’s SharePoint Administrator.
• You can enjoy the PowerPoint or finding aid in the ARM SharePoint 2013 Learning Modules.
Module 4: Editing data in a list or a library in SharePoint 2013

Summary: ARM often has to edit a list item or a library’s document properties by adding or deleting data.

Edit a list item

For an example of editing a list item, begin on Sandbox ARM Home. Then select Sandbox ARM Business Plan. You can edit a list by three methods, using the:

1. “Edit” link
   - Select “edit” from the New/Edit navigation.
     - The list changes from a web page style to a datasheet style
     - Learn about navigations in Module 1.
   - Add, edit, or delete item data
   - Select “Stop” link from the fourth action navigation

2. ITEMS tab
   - Select the item’s row (it will turn blue)
   - Select ITEMS tab in the Tab navigation. Learn about navigations in Module 1.
   - Select “Edit Item” command in the “Manage” group from the ribbon
     - The item changes to show editable fields
     - Learn about the ribbon in Module 2.
   - Add, edit, or delete item data
   - Select “Save” command in ribbon

3. LIST tab
   - Select the LIST tab in the Tab navigation. Learn about navigations in Module 1.
   - Select the “Quick Edit” command in the “View Format” group from the ribbon
     - The list changes from a web page style to a datasheet style
     - Learn about the ribbon in Module 2.
   - Add, edit, or delete item data
   - Select “Stop” link from the fourth action navigation

Your Practice Challenge: From the Sandbox ARM Business Plan, edit a list item using the Edit Item tab.

Bonus Challenge: From the Sandbox Special Projects there are six apps, to include: All Documents (one document app), Announcements, Milestones, Team Members, and Links (four list apps), and Calendar (one calendar app). Find a list app and enter a list item using the New Item command in the New/Edit navigation.

Edit document properties

For an example of editing a document’s properties, begin on the Sandbox ARM Home. Select the Sandbox Rulemaking Metric link, and open the “Approved” group. You can edit the document properties by two methods, using the:

1. Ellipsis
   - Open the “Approved” group
   - Select the first ellipsis next to the document’s title.
     - Learn about the ellipsis in Module 3.
   - In the next menu, select the second ellipsis
   - Select “Edit Properties”
     - The item changes to show editable fields
   - Add, edit, or delete item data
   - Select “Save” command in ribbon

2. FILES tab
o Select the document’s row (it will turn blue)
o Select the “FILES” tab in the tab navigation. Learn about navigations in Module 1.
o Select the “Edit Properties” command in the “Manage” group from the ribbon.
  ▪ The item changes to show editable fields
  ▪ Learn about the ribbon in Module 2.
o Add, edit, or delete item data
o Select “Save” command in ribbon

Your Practice Challenge: From the Sandbox Rulemaking Metric, edit document properties using the Files tab.

Bonus Challenge: From the Sandbox Special Projects there are six apps, to include: All Documents (one document app), Announcements, Milestones, Team Members, and Links (four list apps), and Calendar (one calendar app). Find the document app and add a new document using the New Document command in the New/Edit navigation.

This is the basic information about editing data in list items and document properties to help you navigate the ARM’s SharePoint sites. If you have any questions, contact ARM’s SharePoint Administrator. You can enjoy the PowerPoint or the finding aid in the ARM SharePoint 2013 Learning Modules.
Navigating SharePoint 2013

Module 5: Using Views

Presented to: Office of Rulemaking
By: ARM SharePoint Administrator
Date: Determined by ARM employee
Summary

Views help to organize or select or display properties in a list or library. When a list or library has many associated properties in columns, views help to narrow the scope of information.
1. Where are the views?

There are two ways to see the menu of views in either a list or a library.

1. Select the LIST or LIBRARY tab
2. Select the ellipsis in the fifth action navigation.

For an example of a list app’s views, begin on the Sandbox ARM Home. Then select the Sandbox Tracking link.
1-1. Select the LIST tab

Select the LIST tab in the first navigation.

– From the ribbon, in the Manage Views group, select the dropdown box under the Current View command. This will give you a menu of the different views.
  • Learn about the navigations in Module 1.
  • Learn about the ribbon in Module 2.
1-2. Select the ellipsis in navigation

Select the ellipsis in the fifth action navigation.

- This will provide a menu of views.
- Learn about the ellipsis in Module 3.
2. Types of views

There are six types of ways to display information for a view, to include:

2-1. Standard View – On a web page
2-2. Datasheet View – In an editable spreadsheet that is convenient for bulk editing
2-3. Calendar View – In a daily, weekly, or monthly calendar
2-4. Gantt View – In a Gantt chart to see graphical representation
2-5. Access View – In Microsoft Access to create forms and reports
2-6. Custom View in SharePoint Designer – With capabilities such as conditional formatting

The most commonly type used are the Standard and Datasheet views.
3. How to create a view

For an example of how to create a views continue using the Sandbox Tracking link.

3-1. Select the LIST tab in the first navigation.
   • From the ribbon, in the Manage Views group, select the Create View command.
   • Learn about the navigations in Module 1.

3-2. Select the type of view.
   • In the View Name field, create a name for the view.
3. How to create a view - continued

3-3. Select your audience.
3-4. In the Columns section, select to display the column names you want to see, and choose the column position.
3-5. Scroll down this page to see other options available.
3-6. When complete, select “OK” at the top right or bottom right of the page. The web page will refresh to show your new view.
4. Modify a View

You might want to edit the selection of column(s) or the position of column(s) in your new view.

* For an example of how to create a views continue using the Sandbox Tracking link.

4-1. Select the LIST or LIBRARY tab in the first navigation.
4-2. From the ribbon, in the Manage Views group, select the Modify View command.
Your Practice Challenge

On the Sandbox Tracking web page, from the LIST ribbon, in the Manage groups, use the Create Column command, to create a new column.
Bonus Challenge

From the Sandbox Special Projects there are six apps, to include: All Documents (one document app), Announcements, Milestones, Team Members, and Links (four list apps), and Calendar (one calendar app). Select the header from one of the list apps and use the Create View command in the Manage View Group of the LIST Tab’s ribbon to create a new view.
Using views

• If you have any questions, contact ARM’s SharePoint Administrator.
• You can enjoy the PowerPoint or finding aid in the ARM SharePoint 2013 Learning Modules.
Module 5: Using Views in SharePoint 2013

Summary
Views help to organize or select or display specific properties in a list or library. When a list or library has many associated properties in columns, views help to narrow the scope of information.

1. Where are the views?
There are two ways to see the menu of views in either a list or a library. For an example of a list app’s views, begin on the Sandbox ARM Home. Then select the Sandbox Tracking link.
   1-1. Select the LIST tab in the first navigation. Learn about the navigations in Module 1.
       - From the ribbon, in the Manage Views group, select the dropdown box under the Current View command. This will give you a menu of the different views. Learn about the ribbon in Module 2.
   1-2. Select the ellipsis in the fifth action navigation. Learn about the ellipsis in Module 3.
       - This will provide a menu of views.

2. Types of views
There are six types of ways to display information for a view, to include:

   2-1. Standard View – On a web page
   2-2. Datasheet View – In an editable spreadsheet that is convenient for bulk editing
   2-3. Calendar View – In a daily, weekly, or monthly calendar
   2-4. Gantt View – In a Gantt chart to see graphical representation
   2-5. Access View – In Microsoft Access to create forms and reports
   2-6. Custom View in SharePoint Designer – With capabilities such as conditional formatting

The most commonly used views are Standard and Datasheet.

3. How to create a view
Creating a new view allows you to select certain columns, which are most important to the information you need. For an example of type of views, continue on the Sandbox Tracking link.

   3-1. Select the LIST tab in the first navigation. Learn about the navigations in Module 1.
       - From the ribbon, in the Manage Views group, select the Create View command.
   3-2. Select the Standard type of view. See the types of views in section 2 of this module.
       - In the View Name field, create a name for the view.
   3-3. Select your audience.
   3-4. In the Columns section, select to display the column names you want to see, and choose the column position.
   3-5. Scroll down this page to see other options available.
   3-6. When complete, select “OK” at the top right or bottom right of the page.
       - The web page will refresh to show your new view.

4. Modify a View
You might want to edit the selection of column(s) or the position of column(s) in your new view. For an example of how to modify a view, continue on the Sandbox Tracking link.

   4-1. Select the LIST or LIBRARY tab in the first navigation.
   4-2. From the ribbon, in the Manage Views group, select the Modify View command.

Your Practice Challenge: On the Sandbox Tracking web page, from the LIST ribbon, in the Manage groups, use the Create Column command, to create a new column.
**Bonus Challenge:** From the [Sandbox Special Projects](#) there are six apps, to include: All Documents (one document app), Announcements, Milestones, Team Members, and Links (four list apps), and Calendar (one calendar app). Select the header from one of the list apps and use the Create View command in the Manage View Group of the LIST Tab’s ribbon to **create a new view**.

This is the basic information about views to help you navigate the ARM’s SharePoint sites. If you have any questions, contact ARM’s SharePoint Administrator. You can enjoy the PowerPoint or the finding aid in the ARM SharePoint 2013 Learning Modules.
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<th>Module3</th>
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