Exercise 6 – SharePoint and Office

**Time**: 15 minutes.

On the **Contributor Class** page, click **Exercises** in the left column to view the links for these tasks.

## Connect to Office

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| Task 1 | Take these steps… |
| Connect a SharePoint library to your Office application | 1. Go to the **Shared Documents** library.
2. Click the **LIBRARY** tab, click the down arrow under **Connect to Office** and click **Add to SharePoint Sites**.
3. You may see the **Library added** message appear briefly in the upper right.
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Because it occasionally takes a couple of minutes for the library connection to register, let’s do Task 2 next (which doesn’t use the connection). Then, when we do Task 3, the connection should be ready for you.

## Excel

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| Task 2 | Take these steps… |
| Export a SharePoint list and create an Excel spreadsheet | 1. Go to the **Custom List**.
2. Click the **LIST** tab and click **Export to Excel**.
3. At the bottom of the screen, click **Open** to view the list in Excel.
4. Click the **Enable** button so the list remains synchronized with the server.
5. In Excel, click the **File** tab and click **Save** to store the file as an Excel spreadsheet.
6. Navigate to your desktop and store the file as Book1 (or any other name) there.
7. Close Excel.

Note: You can also export libraries. The document name column will contain a link to the document in the SharePoint library. |

## Word

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| Task 3 | Take these steps… |
| Open and check out a document | 1. Open Word.
2. In Word, click the **File** tab and click **Open**.
3. In the left column, under **Favorites**, click **SharePoint Sites**.
4. Double-click the shortcut for the **Contributor Class - Shared Documents** library.
5. Click the name of a file that you uploaded and click **Open**.
6. When the document opens, click **Check Out**.
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| Edit the document  | 1. Make several changes to the content of the document, such as changing text, dates or times.
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| Edit the document’s properties | 1. To view all of the document’s properties, click the **File** tab and click **Info**. Then, at the bottom of the right column, click **Show All Properties**.
2. In the right column, change the properties for Doc Status, Document Type, and Milestone to other values.
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| Save and check in the document | 1. Save the document in Word by clicking **Save** in the left column.
2. To check in the document in Word, return to the **File Info** page, click the **Check In** button and close the document.
3. Return to SharePoint and go to the **Shared Documents** library.
4. Click the document name to open the document and review your changes.
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