

PART 1

FOR SHAREPOINT READERS

SharePoint **Readers** are those users who have been added to the standard SharePoint **Visitors** security group and hence granted **Read** permission levels.

Readers are able to view pages and list items, and download documents so that they can edit them offline (although they cannot copy edited documents back to the SharePoint site). They can also open list items, view different versions of documents and create alerts.

Sample

Sample

CHAPTER 1

InFocus

GETTING TO KNOW SHAREPOINT

Microsoft SharePoint 2013 is a business collaboration platform that allows people to build websites. Unlike typical internet websites, however, SharePoint sites make use of special features – such as lists, libraries, apps, web parts, and more – that make it easier for people to work collaboratively.

In this chapter you will be introduced to SharePoint and many of its key features.

In this session you will:

- ✓ gain an understanding of **SharePoint**
- ✓ gain an understanding of user accounts and learn how to sign in to a **SharePoint** site
- ✓ learn how to start **SharePoint**
- ✓ gain an understanding of the main components comprising a **SharePoint** site
- ✓ gain an understanding of **SharePoint** sites
- ✓ gain an understanding of team sites
- ✓ gain an understanding of lists
- ✓ gain an understanding of libraries
- ✓ gain an understanding of views
- ✓ gain an understanding of apps
- ✓ learn how to sign out of **SharePoint**.

WHAT IS SHAREPOINT?

Unlike programs such as Word or Excel, Microsoft SharePoint is not a program that you install on your computer. It is either a network-based product that is installed on your company's

servers or is cloud-based for Office 365 users. In very simple terms, SharePoint is a tool that allows people to create websites where they can work together, save documents and find information.

What Is SharePoint Used For?

SharePoint has an enormous number of features and components that can be turned on and off by the administrator as desired. As a result of this, SharePoint is extremely flexible allowing it to be used for many different business purposes. For example:

- SharePoint is commonly used to improve collaboration among teams of people in organisations, such as in the Finance Division or HR. To do this, you create SharePoint **team sites**. A team site is a website in which members can upload and share documents, assign tasks, view team events and meetings on a shared calendar, and more.
- SharePoint provides an organisation with a place to store all of its content. Rather than saving documents on multiple shared network drives, or on personal drives and then people having to email them back and forth, it's easier to place all content in one centrally-managed repository. By using the security options in SharePoint, sensitive content can be placed in areas where it can be monitored and accessed by a limited number of people, while other content can be placed in areas where everyone has total access to it.
- In many larger organisations, SharePoint is often used as a corporate intranet. A corporate intranet connects the individual SharePoint sites within the organisation and allows access to information and business applications. For example, staff can download forms, read the latest company news, perform company-wide searches for documents, and more.

What Do SharePoint Sites Look Like?

It is almost safe to say that no two SharePoint sites will look or be the same – this is because of choices made during the building of SharePoint sites and because the sites are accessed using different web browsers, such as Internet Explorer, Firefox, Chrome and so on.

- **Permissions** – If you have been assigned the **Full Control** permission level, you have access to the full range of options to manage the site. If you have been assigned the **Edit** permission level, you will have access to fewer options. If you have been assigned the **Read** permission level, you can only read content but not change it. Note that permissions are flexible and your organisation may create their own permission settings.
- **Customisation** – Your organisation may choose to customise SharePoint. For example, it may apply branding to a site, customise site navigation, remove the ribbon functionality, and more. SharePoint is highly flexible.
- **SharePoint Version** – SharePoint is available in several versions. **SharePoint Foundation** is the underlying technology for all SharePoint sites and it is installed on Windows-based servers. If you are prompted by Windows to sign in to a network, you have access to SharePoint Foundation as a minimum.

Although Foundation provides a great deal of functionality, larger organisations are more likely to install **SharePoint Server** (and there are two editions of this product – **Standard** and **Enterprise** – each adding more features) to gain additional functions and capabilities from those provided by the underlying Foundation. A final version of SharePoint is **SharePoint Online** which is available with Office 365. This version is based on Foundation but it can offer additional functionality, depending on the Office 365 plan that your organisation has purchased, such as Office 365 Midsized Business or Office 365 Enterprise E3.

The functionality differs between versions. For example, SharePoint Foundation is ideal for building collaboration sites – sites that enable groups of people to upload and download documents, assign tasks, share events, and use workflows – but it doesn't have enough features to build a corporate intranet, provide a corporate-wide search facility, or let employees build their own personal sites for storing their own documents. You need a version of SharePoint Server or Office 365 Midsized Business or Enterprise E3 for these features.

So as you are working your way through this course, be aware that your SharePoint site may look totally different to our samples and that you may or may not have access to the features to which we refer.

COURSE USER ACCOUNTS

This course has been designed (and separated accordingly) with the three default SharePoint groups in mind: **Visitors**, **Members** and **Owners**. These groups have access to different

SharePoint features based on their permission levels. Here we describe the permissions for the three SharePoint groups and explain how to use your SharePoint site using these different accounts.

User Account Basics

Before you could start this course, the course instructor had some simple setting up to do.

The instructor built the SharePoint sites that you will be using during the first part of this course and populated them with some very basic content. The instructor then granted multiple user accounts access to the SharePoint site, where each account belongs to one of the three default SharePoint groups as shown below.

- Accounts in the **Visitors** group with **Read** permission levels – users can look at the content but not edit it, and they can download content which they can edit as desired (but it cannot be copied back to SharePoint).
- Accounts in the **Members** group with **Edit** permission levels – users can add, edit and delete files and items; create and delete lists, libraries and pages; and create and work with simple list workflows.
- Accounts in the **Owners** group with **Full Control** permission levels – users can create and modify sites, determine who can use the site, create custom workflows, and more.

Note: Managing SharePoint security and permission levels is covered in *Part 3 – For SharePoint Site Managers*.

Signing Into The SharePoint Site

At the start of each chapter in this course, you will be instructed to sign in to a SharePoint site as a user with a particular permission level – for example, you must sign in as a user with **Read** permission levels when working through each chapter in *Part 1 – For SharePoint Readers*.

Use the following procedure to sign in to the SharePoint site (although the exact steps you need to complete may be slightly different to those described below as they will depend on how SharePoint has been set up for your course).

1. If necessary, sign in to Windows on your computer using the user ID that has the required permissions in the SharePoint site for the exercise that you are about to complete
Your course instructor will tell you which user to sign in to Windows as...
2. Open the browser and type the URL to the SharePoint site – you will need to get this address from your course instructor
SharePoint will open in the browser window and you will be prompted to sign in...
3. Enter the user ID and password as required for the chapter that you are working on
The SharePoint site will open in the browser window...
4. When you need to use an account with a different permission level – for example, you must sign in as a user with **Full Control** permissions for the first chapter in *Part 2 – For SharePoint Authors*, you must sign out of the site (which will close the browser window), re-open the browser, navigate to the site, and then sign in using the new account
This ensures that you will have the appropriate permissions for the exercise.

STARTING SHAREPOINT

To access a SharePoint site, you must use an internet browser application. This is necessary as SharePoint is a browser-based web platform that uses specialised websites to gather, organise

and present the information that you can access. You must know the location (URL) of the site – if you don't, ask your administrator to email you the link to the specific site.

Try This Yourself:

*Before starting this exercise ensure that your computer is switched on (you will need **Read** permissions for this exercise)...*

- 1 Open your internet browser

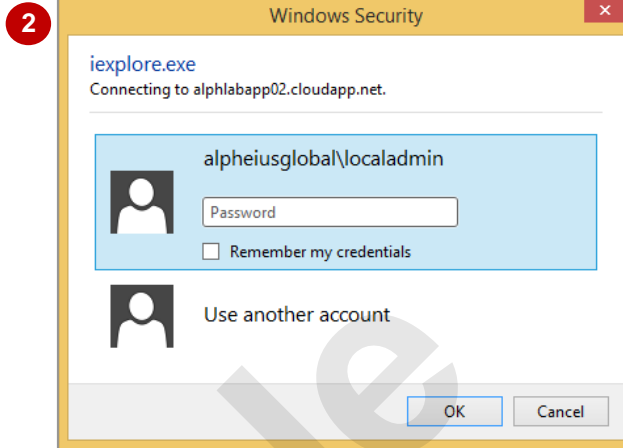
We're using Internet Explorer but you can use another browser, such as Firefox or Chrome. Before you can open a SharePoint site, you must get the URL for the team site from your instructor...

- 2 Type the URL to the **Human Resources** site in the address box in the browser window, then press

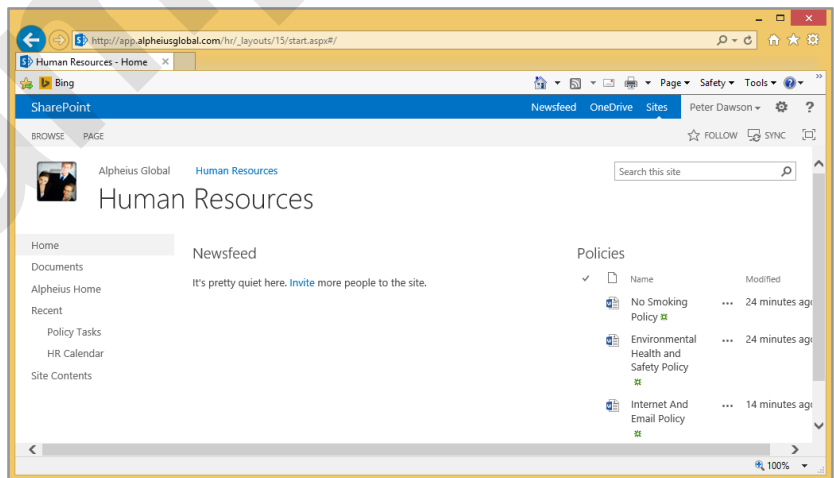
Depending on the setup of the site and which version of SharePoint you are using, you might be prompted for a password...

- 3 If prompted, type your user name and password, then click on **[OK]** or **[Sign in]**

A SharePoint team site will display. Your site may look different to our sample as it depends on the way the site manager has set up the site



If you are using SharePoint Server, you may or may not be prompted for a password via the Windows Security dialog box. Because SharePoint is often configured to automatically identify you, SharePoint might sign you in with the user name and password that you used when you signed in to your computer.



- 3 *If you don't have access to a particular SharePoint site, the Access Denied page will display informing you of this. If this occurs, you will need to contact the site manager and request that they grant you permission to access the site.*

For Your Reference...

To **access** a **SharePoint site**:

1. Open an internet browser
2. Type the link to the site in the address box
3. Press
4. Type the **User name** and **Password** and click on **[OK]** or **[Sign in]** if prompted

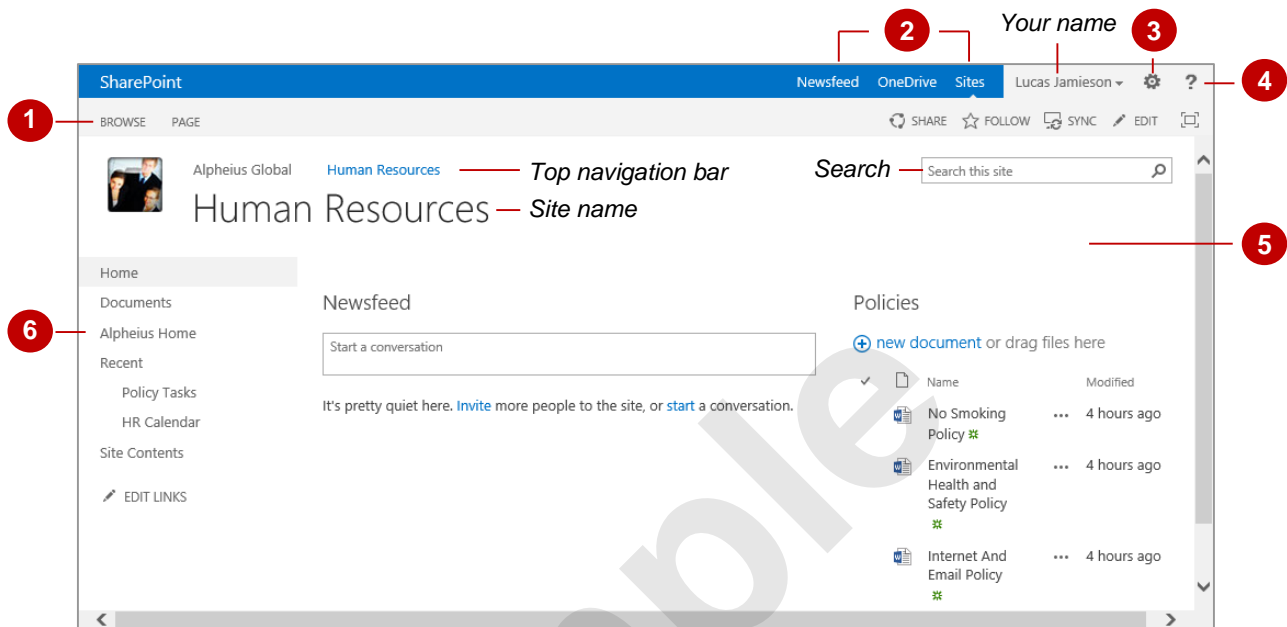
Handy to Know...

- If you are using **Internet Explorer 11**, you may have issues accessing certain functions. To overcome this try displaying your site in compatibility mode. From your site, click on the gear icon to the right of the address bar, select **Compatibility View settings**, click on **[Add]** to add your site, then click on **[Close]**.

CORE ELEMENTS OF A SHAREPOINT SITE

All SharePoint sites are created from a template that best suits a particular business purpose. But regardless of which template is used, all sites tend to comprise the same basic elements. Here

we look at one of the most commonly-used sites in SharePoint – the team site – to describe the core elements. Once you know how to use a team site, you can use any SharePoint site.



- 1 Ribbon**

The ribbon provides tools and links to different functionality based on where you are and what you are doing in a SharePoint site. The ribbon tabs, which appear above the top navigation bar and site logo, let you click on a tab's name to access that ribbon.

The **BROWSE** tab is the default tab in most pages. This tab includes two of the mechanisms that allow you to navigate the site – **top navigation bar** and the **search** box. (See chapter 2 for information describing how to use these features.)

As you move around the site, different tabs will display providing you with commands relevant for where you are. For example, in a site's home page (as above), along with the **BROWSE** tab, the **PAGE** tab will display letting you email a link to the page or make the page your browser's home page. Or, if you open a document library, two other tabs will appear in addition to the **BROWSE** tab providing tools to work with the documents (**FILES** tab) and settings to work with the library as a whole (**LIBRARY** tab).
- 2 Social networking options**

Each SharePoint Server 2013 and SharePoint Online user has a personal site (known as **My Site**) where data is personalised for them. Each personal site includes a **Newsfeed**, **OneDrive for Business** document library and **Sites** pages. Your OneDrive for Business and Sites pages give you suggestions for documents and sites to follow, based on your profile information and newsfeed activity.

See the *Social Networking* chapter for more details about these options.
- 3 Settings**

The **Settings** menu (displayed by clicking on the gear icon) provides options for adding pages, sharing pages and more.
- 4 Help**

Clicking on the **Help** icon displays the **SharePoint Help** pane where you can quickly search for help.
- 5 Main content area**

This area displays the content in the selected page, such as the home page in our example above, a list of documents stored in document library, a calendar in a calendar list, and so on.
- 6 Quick launch bar**

The quick launch bar (also known as the left navigation bar) provides clickable links normally to content in the current site. This content is usually lists and libraries, such as the **Documents** library and **Policy Tasks** and **HR Calendar** lists above. See the *Navigating A SharePoint Site* chapter for more information about using the quick launch bar.

SHAREPOINT SITES

A SharePoint **site** is a specialised website used to gather, organise and present the information you put into SharePoint. There are different types of sites available, including collaboration sites

such as a team site or blog, enterprise sites such as a document centre or records centre, and publishing sites such as a large intranet portal or enterprise Wiki.

Sites

SharePoint sites are different in structure to typical internet websites. Internet websites comprise linked pages, while SharePoint sites comprise pages that act as repositories for information and content. SharePoint sites store this information and content in special containers (or **apps**) known as **lists** and **document libraries** (you'll learn about these SharePoint elements later in this chapter). Multiple subsites can also be created under a site.

SharePoint lets you create many types of sites (as long as you have the correct permissions and depending upon the version of SharePoint you are using) based on its various templates. Examples of some of the common sites used for collaboration include:

- **Team Site** – only the members of the team can sign into this private website and use it to collaborate, organise, create and share information and documents. A default team site includes a shared document library, a newsfeed, a site assets library and a wiki library
- **Blog** – a site in which a user or group of users write opinions and share information
- **Project Site** – a site used for managing and collaborating on a project
- **Community Site** – a site where community members can explore, discover content and discuss common topics.

The structure of the SharePoint sites created for users in an organisation will vary enormously. With that said, however, most larger companies will create team sites for their various departments and teams.

Personal Sites

Unlike other SharePoint sites, a **personal site** (known as a **My Site**) is an online site for individual users in an organisation that shows information belonging to only that user, such as their emails, upcoming meetings from their calendar, tasks assigned to them, and a list of recently worked on documents. You can also keep your personal details up to date here, which is particularly important if they are used in a corporate directory.

You can upload documents to the personal document library (called **OneDrive for Business**) in your personal site, and only you can see and manage these documents, unless you share them. A personal site also has a page for managing sites that you are following and a newsfeed that tells you what your colleagues are up to.

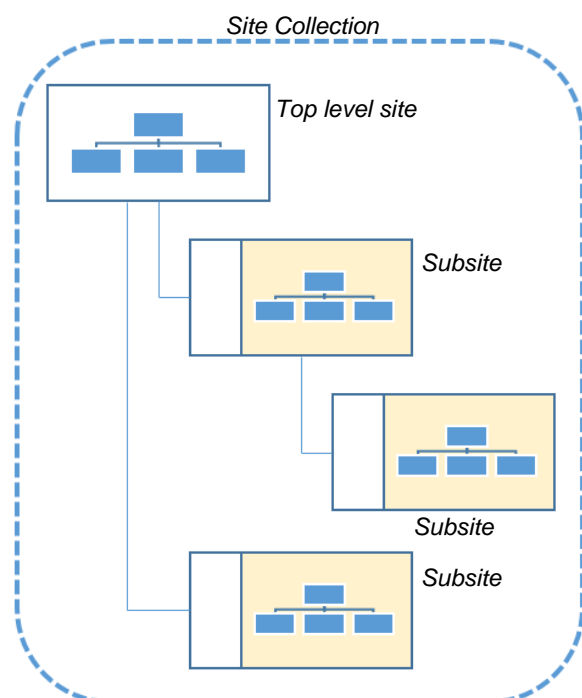
Personal sites (which are discussed in more detail later in the Social Networking chapter) are available for all versions of SharePoint except Foundation and SharePoint Online for Small Businesses.

Site Collections

Every SharePoint site is part of a **site collection**. A site collection is, just as it sounds, a collection of related sites (as shown to the right). The site at the top of a site collection is known as the top-level or root site – this is the site that was created first. If you then create a site from within the top-level site, such as a team site, this new site will be known as a subsite or child site.

The subsites and top-level site in a site collection are linked which means that site visitors can navigate between the sites (if they have the appropriate permission). The sites may also share attributes such as security, but they will contain different content such as pages, lists and libraries.

Although you can create as many subsites as desired in the one site collection, it's better not to; otherwise, site navigation and management may become very difficult. Instead, if you are part of a large organisation, your site collection will be probably just one of many site collections which form part of a larger corporate portal site – commonly, large organisations will create a site collection per department (e.g., Operations, Sales).



TEAM SITES

SharePoint offers a vast variety of built-in site templates. However, the most commonly used site template is the **Team Site** template. This template is used to create **team sites** which are

the sites that are mainly used by teams of people to collaborate, organise, create and share documents. You will be using a team site for the rest of this course so we'll describe them here in more detail.

What Is A SharePoint Team Site?

A SharePoint team site:

- is a *private website* that provides a central storage and collaboration space for documents, information and ideas for team members only. Other employees within the organisation, but outside the team, and people outside the organisation cannot access a team site.
- provides a *storage container* for the team's work. When a team member is ready to save a document that is relevant to the team, they would save it in a document library in the team site. All other non-relevant documents would be saved to a different location, outside the team site.
- has *apps* to help a team stay organised. For instance, you can use *lists* to display information pertinent to the team (such as an announcements list to broadcast key information, new tools or resources to team members or a links list to help your team find key information for their jobs), *document libraries* for storing documents that the team can collaborate on, and *timelines*.
- supports *social networking* both within the team and outside of the team, but within the site collection in which your team site is found.
- provides a space for team members to *collaborate on documents* (as a result of a team site's social networking capabilities). You can share documents with the whole team by posting them on the team site rather than having to email them to your colleagues. You and other team members can then edit the documents either at the same time or individually at different times.
- provides a space for *team conversation* (as a result of a team site's social networking capabilities). Team members can see who is online, and start or participate in a conversation for the team around an issue that you are trying to resolve.
- enables *automation* for a team's *workflow*. For example, a document may need to go through several steps of approval from different people in the team before it can be considered to be final. By creating a workflow and attaching it to the document, the document will pass automatically to the required people after being approved.
- allows you to use forms to collect information, such as surveys.
- is *secured by permissions*. For example, the site's administrator will determine who is a member of the team and what role each member has in a team – such as a contributor, editor, owner etc. They can also add new members as the team grows and delete members as they become redundant.

How Can A SharePoint Site Help You?

A SharePoint site helps groups of people share information and work together. For example, a SharePoint team site can help you:

- coordinate projects, calendars and schedules
- discuss ideas and review documents or proposals
- share information and keep in touch with other people
- document your team communications
- access training resources
- make announcements
- share schedules
- facilitate team discussions.

LISTS

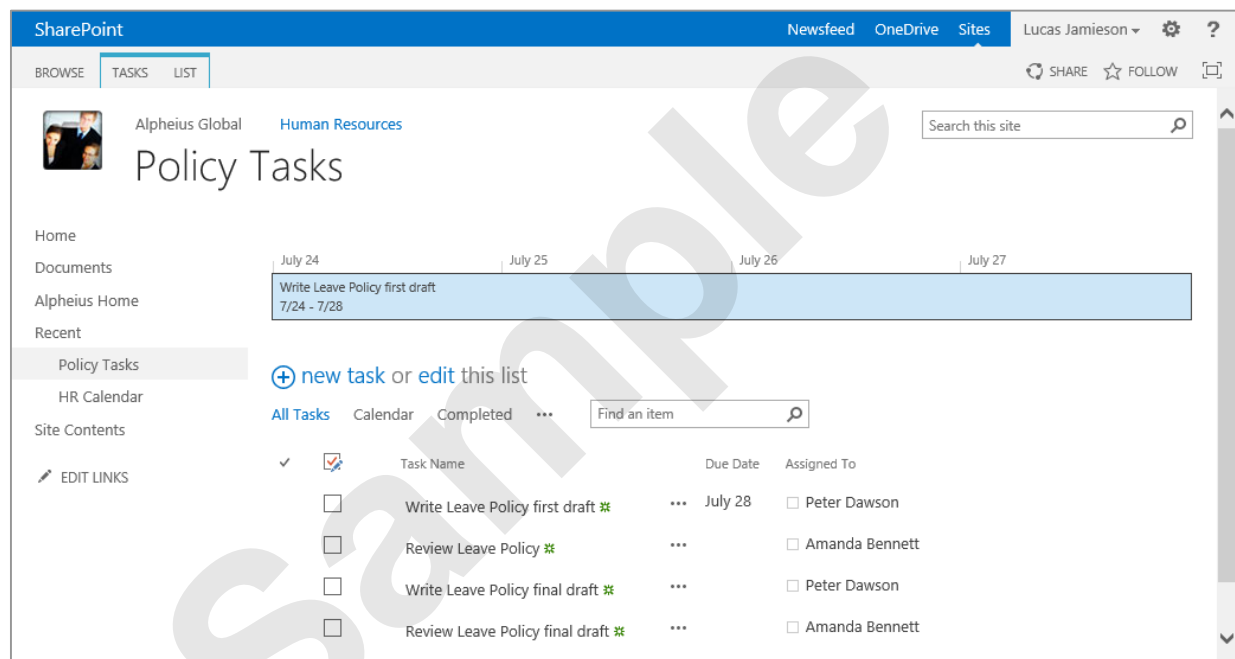
SharePoint is most commonly used to store information and this information is stored on sites in apps known as **lists**. Lists are like simple databases or spreadsheets making them ideal for

storing, presenting and managing information. For example, you can track team events, meetings and appointments in a **Calendar list** or host discussions in a **Team Discussion list**.

Structure Of Lists

A list comprises rows of data where each row is an individual record, known as a **list item**. A list also comprises one or more **columns** (also known as **fields** or **properties**) and it is into these columns that the data is stored for a list item.

For example, look at a sample of a **Tasks list** below. Tasks lists can be created to track work assignments for your team members. This list has four tasks (list items), and each task has data in most of the four columns (such as **Task Name** and **Assigned To**). Lists can be useful for almost anything that can be described by a group of columns.



When you create a new site, SharePoint will add various default lists and document libraries, depending on which template you choose. For example, when you create a **team site**, SharePoint automatically adds a MicroFeed list (which enables users to participate in microblogging via the Newsfeed web app on the home page) and a shared documents library. However, SharePoint makes it particularly easy to add additional apps to your team site by displaying an **Add lists, libraries and other apps** thumbnail which opens a page listing apps that you may wish to add to your site.

As well as adding new default lists, you can modify them (by adding and deleting columns) and even create new custom lists to display information as desired.

Accessing Lists

You can access lists in your website by clicking on their links in the quick launch bar (as we have done in the above example of our team site) or in the **Site Contents** page if their links don't appear in the quick launch bar.

You can also access the contents of a list on a page in your site by inserting a special SharePoint building block, known as a **web part** that displays the list or a particular view of that list. For example, if you have created a Contact list in your site, you may decide that this information should appear on your site's home page if all team members need to access this information regularly. You can do this by editing the home page and inserting a **web part** that displays the data in this list. Note that web parts don't actually store the data, they are simply application components inserted in SharePoint pages that display the list data.

You can quickly open the list from the web part, if desired, by clicking on the web part's title.

LIBRARIES

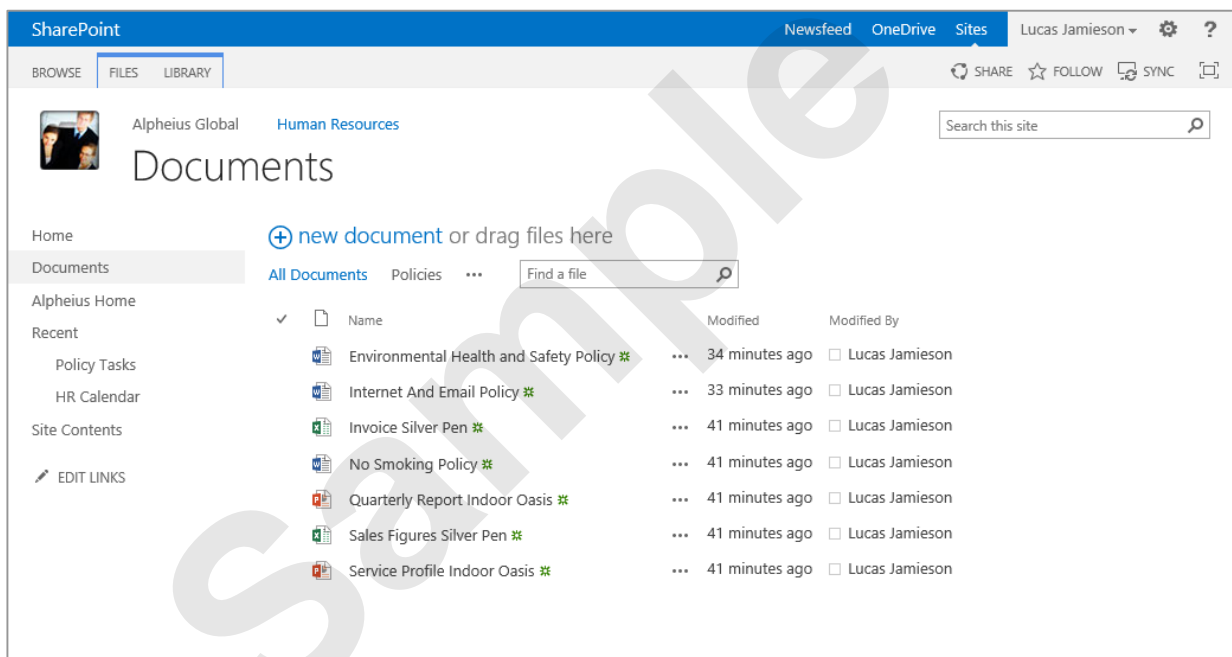
Libraries are used to manage all media stored in SharePoint including documents, forms, images, videos and web pages. Different types of libraries are available in SharePoint with their main

differences being in the types of files that they can store and manage. A library is a special type of a list where every list item is a file.

Document Libraries

Most people working with SharePoint will work with document libraries, such as the **Documents** library in a team site (as shown below). You will find a document library in nearly every SharePoint site, and in many cases, more than one document library. Document libraries are so common that they are often referred to simply as libraries.

Document libraries allow you to store, work on and share documents, such as Word documents, Excel workbooks, PowerPoint presentations, Adobe PDF files, and more. To add files to a document library, you must either upload them or create new files from within SharePoint using the **New Document** command on the **FILES** tab in the ribbon. Note that each row in the library can hold only one file.



Other Libraries

A **picture library** is a special type of document library in which you can store and share images. These libraries contain special features for managing and displaying pictures, including a slideshow. Using the slideshow feature, you can create visual presentations from the selected pictures. You can also link to pictures in a picture library from elsewhere on your site such as from wikis and blogs.

A **wiki page library** is a special type of document library that is designed to store web pages that support wiki syntax. From these libraries you can quickly create new pages which can display different types of content such as text, images, videos and web parts.

An **asset library** is a type of document library that is designed to store, share and manage digital media file assets such as images and video and audio files.

A **form library** is a library designed for storing XML-based business forms (such as status reports or purchase orders) created using Microsoft InfoPath (electronic form creation program that integrates with SharePoint). Users can then open and fill in these forms from the library even if they don't have InfoPath installed on their local computer.

Accessing Libraries

Just like lists, you can access libraries by clicking on their links in the quick launch bar or in the **Site Content** page if their links don't appear in the quick launch bar. You can also access the contents of a library on a page in your site by inserting a web part that points to the library – for example, the **Documents** library is included in a web part on the home page in a default team site.

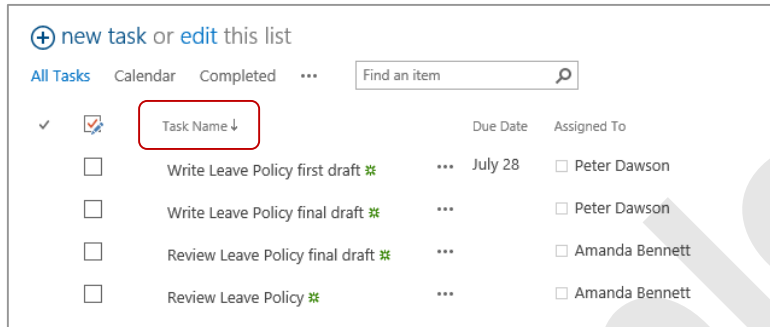
VIEWS

Whenever you look at a list or library in SharePoint, you are looking at a **view** of that list. The list's underlying data is stored in database tables on the SharePoint server. So, rather than

seeing all data stored in a list, different views present the information by displaying specific columns and by applying various sorting, filtering, grouping and styling criteria.

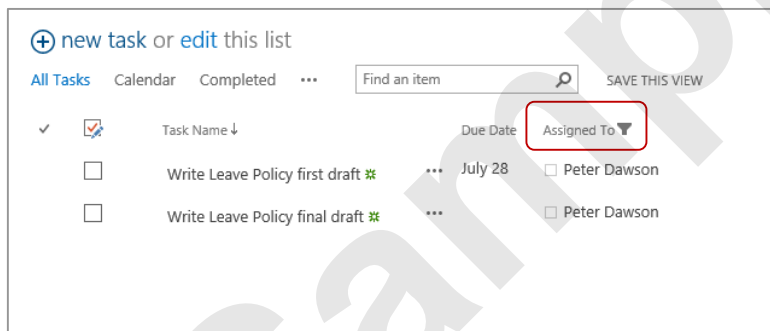
Types Of Views

There are several types of views used in SharePoint. The default view for the majority of lists is **Standard view** which is a tabular format with column headers and the values displayed in rows. Standard view is ideal if you wish to sort the information by a specific column header or filter the information so that only specific records will display (as shown in the two examples below). You cannot edit data in this view type.



The Task list to the left has the default All Tasks standard view applied. Other available views are Calendar, Completed and any others included in the ellipsis menu.

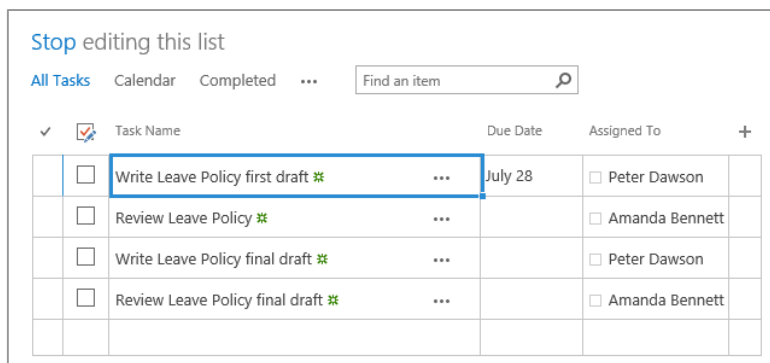
The arrow shown to the right of the Task Name column header indicates that this list has been sorted on this column in descending (Z – A) order.



This same Task list has now been filtered to show only tasks assigned to Peter. The filter (funnel) icon shown to the right of the column header indicates that a filter has been applied to this column.

There are other types of views available in SharePoint.

Datasheet view changes a list or a library to appear like an Excel worksheet (see below). It provides a data grid for viewing and editing data as rows and columns making it the ideal view if you wish to quickly add, edit or delete multiple items in a list or library. Some views are built in Datasheet views so switching to them displays the datasheet interface automatically. But, you can switch any Standard view to a Datasheet view version simply by clicking on **edit this list** in the list or on the **Quick Edit** command in the ribbon.



This is an example of the same Task list shown in Datasheet view. Notice that the links to add a new task or edit this list have been replaced by the Stop editing this list link.

Calendar view is a special view that formats the underlying data into a calendar. This view filters the data so that you see only the required data, such as a month's worth of calendar information, and this calendar information shows only a summary of the scheduled events (rather than all of their details). Calendar view is the default view when you access a **Calendar list**.

Although SharePoint provides one or more views for each list and library, you can create **custom** views if you have appropriate permissions. For example, the home page of a site may include a web part that displays only some of the data in a list – in other words, the web part has had a custom view applied to the list or library.