FAST
FACULTY AND STAFF TRAINING

Introduction to SharePoint 2013

WCU
WEST CHESTER UNIVERSITY

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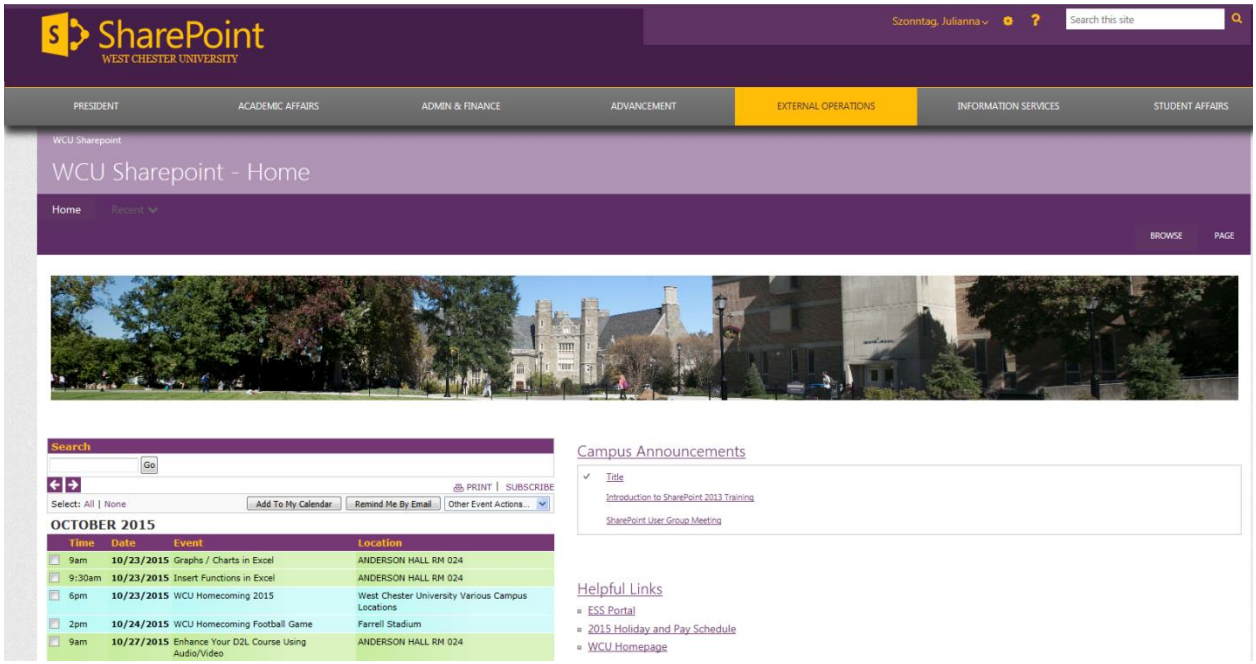
INTRODUCTION

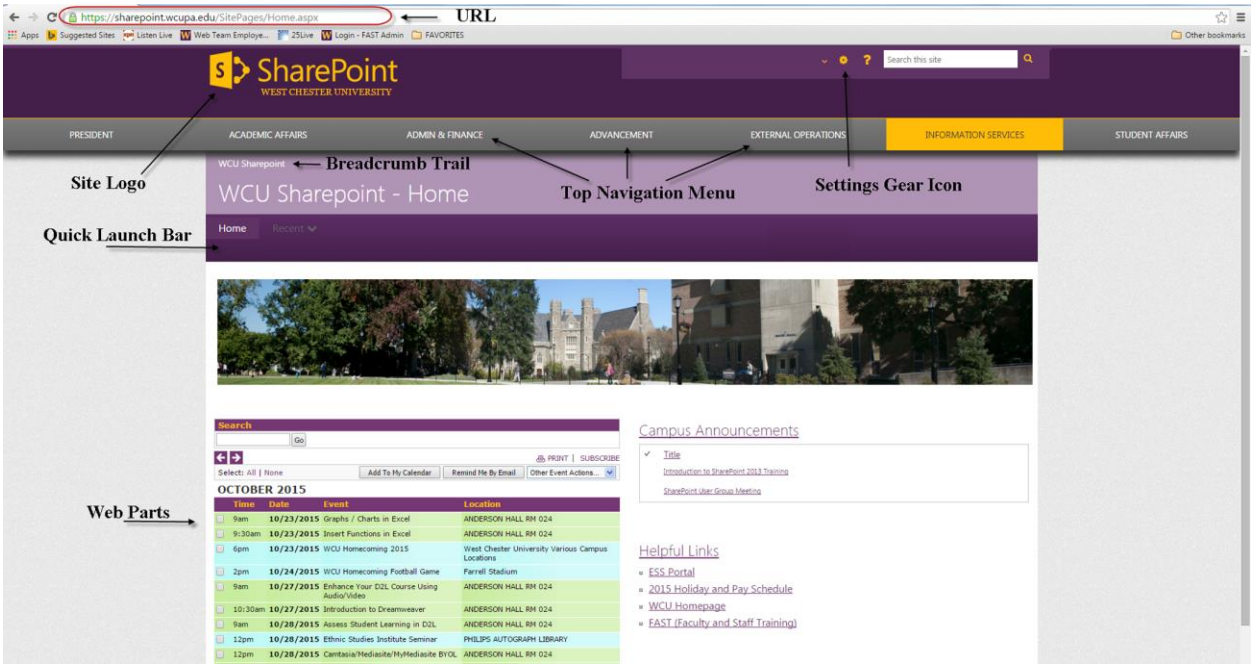
Microsoft SharePoint 2013 is a Web-based platform that is used for collaboration among team members working on various projects. An important benefit to using SharePoint sites is the centralization of information. If you use a SharePoint site you have a central location where you can access, work with, and collaborate on different aspects of a project. You will no longer need to search through your e-mail for an important attachment, access file shares to locate different documents, or guess whether the information you have is the most current.

WCU's SharePoint 2013 has a branded look. All site pages now have the same look and feel. Team site pages can be customized with web parts and images. However the overall theme of the page shall keep the branded look.

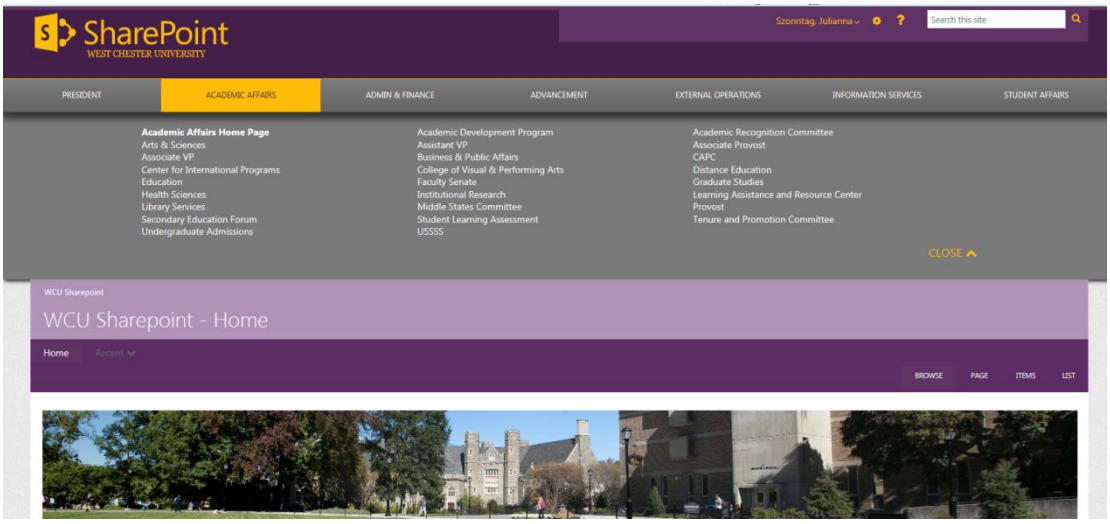


BASIC NAVIGATION

You can access any SharePoint site by typing the URL into the address bar. Each site will have the same basic navigation buttons and bars.

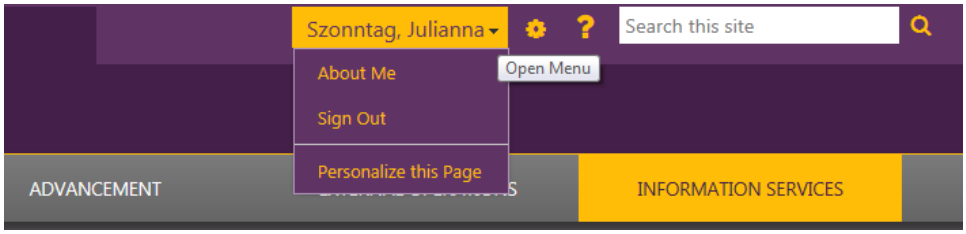


EXPANDED TOP NAVIGATION MENU

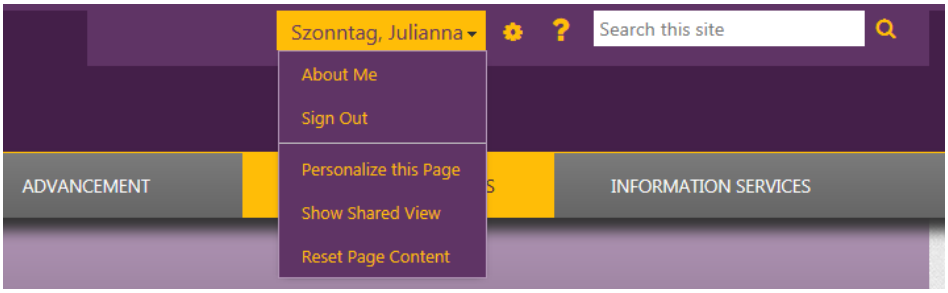


NAVIGATION BUTTONS AND BARS

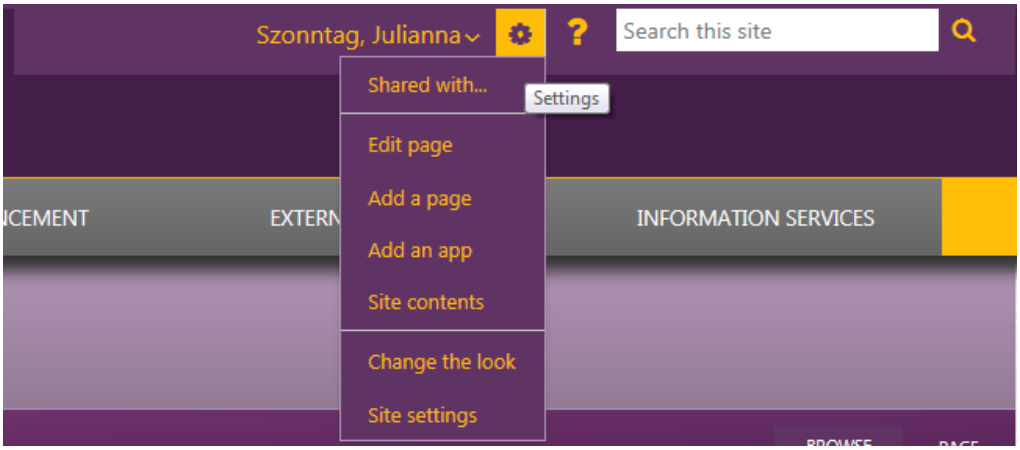
- User menu: This menu provides you with the option to logout of the site and Personalize this Page. You can only personalize pages that contain Web Parts. The **User Options** menu displays that option on eligible pages. The user must also have Contribute rights to the page in order to personalize it. **NOTE:** the About Me is disabled. It refers to My Sites which is disabled.



- To Personalize the Page:
  - Click on Personalize this Page
  - The Edit ribbon appears
  - Click in the page where you would like the web part to appear
  - Click on Stop Editing
  - To switch back to the standard view click on Show Shared View
  - To delete your personal view click on Reset Page Content

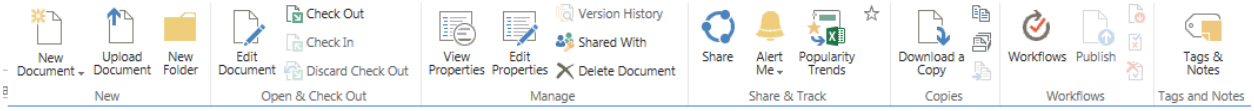


- Settings Gear Icon: Any action you need to perform on your site is listed here. It should be noted however, that the Settings Gear displays options contingent on the user's permission level.



- Breadcrumb Trail: This bar shows the path that the user has taken to arrive at a page. It provides links back to each previous page the user navigated through to get to the current page.

- Ribbon Tabs: The appearance of the ribbon has changed.



- Quick Launch: The Quick Launch bar has now moved to the top of the page, just below the page title. **NOTE:** You have the ability to customize the Quick Launch bar just as in SharePoint 2010.

- All Site Content: Displays all sites, lists, and libraries in this site. Can be accessed from either the Settings Gear icon or the Site Contents link from the Quick Launch menu.

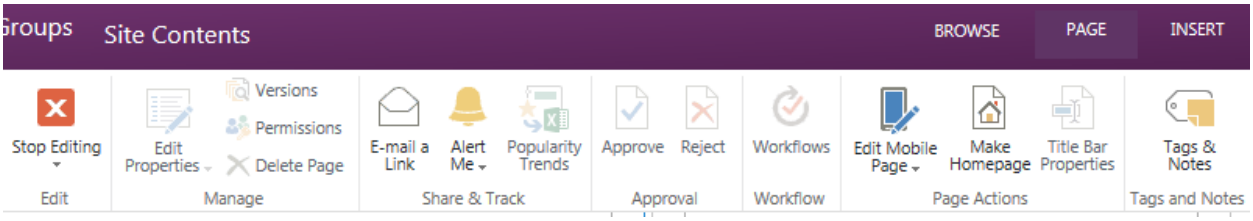
RIBBON

The Ribbon is a toolbar that appears across the top of each page and displays many of the most commonly-used tools, controls and commands. The number and types of controls that appear on the ribbon vary according to context and depend in part on the type of page you are viewing, the level of control that your administrator has granted to users, and your permission level within the site. Tabs, groups, and commands on the ribbon are contextual. Therefore, the ribbon commands available to you change depending on where you are and what you are doing.

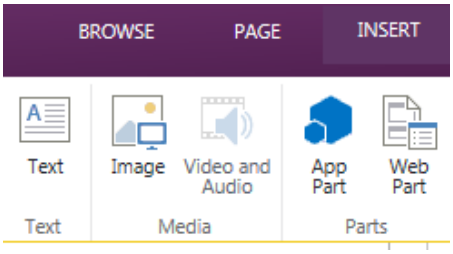
- Browse: This button closes any ribbon that is open.

- Page: You can edit your page by clicking on this button or by selecting Edit page from the Settings Gear drop down menu.

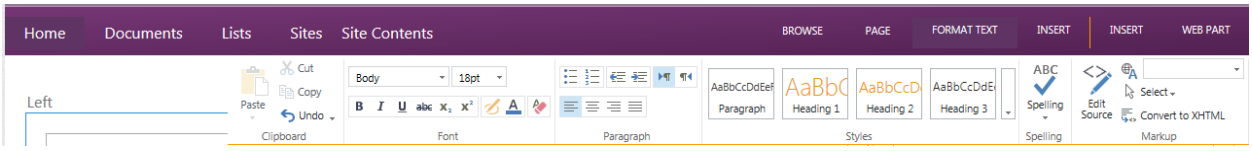
- Editing Tools: Check out the page for editing, customize page.



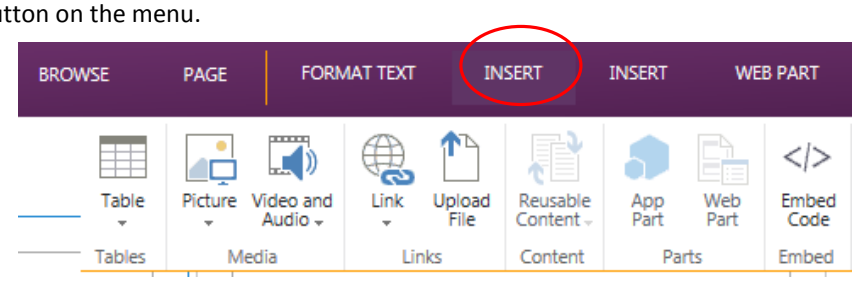
- Editing Tools → Insert : Add web parts, images, text, Apps (libraries, lists).



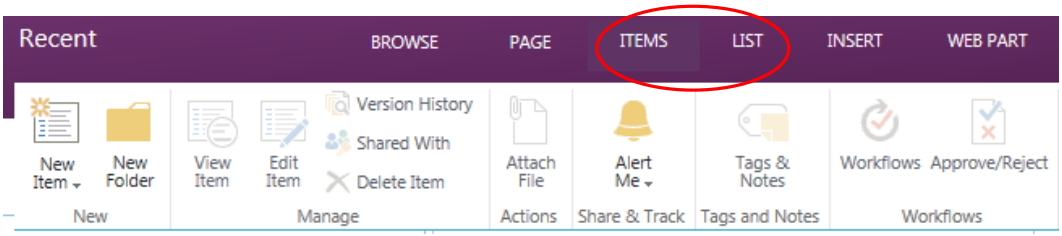
- Editing Tools → Format Text: If you have a Content Editor Web part on your page you will see this ribbon if you click inside the Content Editor Web part.



- Editing Tools → Insert: If you have a Content Editor Web part on your page you will see an additional Insert button on the menu.



- Editing Tools → Items and List buttons: If you click inside a List web part the Items and List buttons will appear on the edit ribbon.

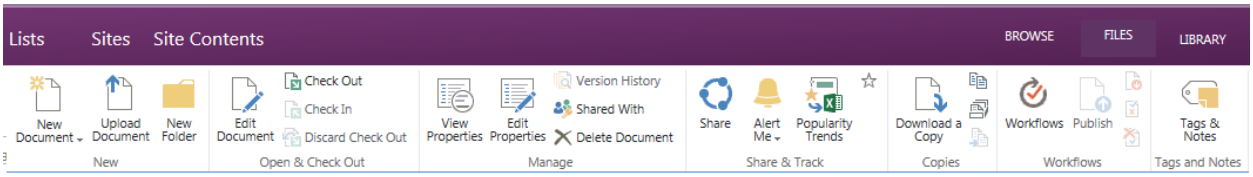


LIBRARY RIBBON

The ribbon that appears when you select a library from the Libraries list differs from the site page ribbon illustrated in the previous section.

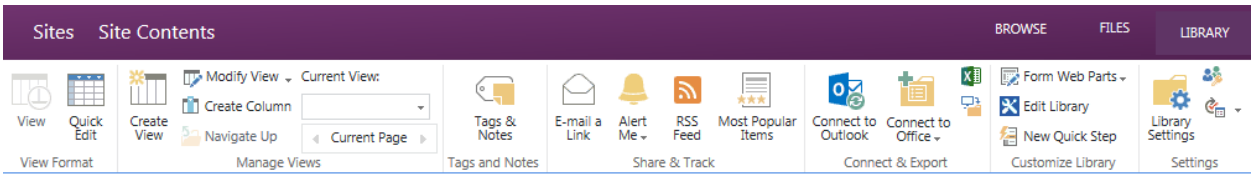
To access the ribbon click open a document library.

- Files button: To display the ribbon icons as active select a file from the library. Create a new document, upload documents, and manage document permissions. Use this tab to work on individual documents.



- Library button: Modify the view, create a new view, manage library settings and permissions. Use this tab to work on the library as a whole.

- Click on the Browse button to close the ribbon.



RECYCLE BIN

The Recycle Bin link appears on the Site Contents page. If you are an owner of a site you can also add a Recycle Bin link to the Quick Launch bar.

PERMISSION LEVELS AND GROUPS

A SharePoint group is a set of users that can be managed together. A permission level is a set of permissions that can be assigned to a specific group for a specific securable object. Adding users to a SharePoint group is recommended, as this makes managing permissions easier across multiple sites. SharePoint groups and permission levels are defined at the site collection level and are inherited from the parent object by default. Permissions do not need to be inherited from the parent site, you can create unique permissions for your site. The following table lists the default SharePoint groups you will see when you create a site using the team site template.

Group name	Default permission level	Description
Visitors	Read	Use this group to grant people Read permissions to the SharePoint site.
Members	Contribute	Use this group to grant people Contribute permissions to the SharePoint site.
Owners	Full Control	Use this group to grant people Full Control permissions to the SharePoint site.

If you use a site template other than the team site template, you will see a different list of default SharePoint groups. For example, the following table shows the additional groups provided by a publishing site template.

Group name	Default permission level	Description
Restricted Readers	Restricted Read to the site, plus Limited Access to specific lists	Members of this group can view pages and documents, but cannot view historical versions or review user rights information.
Style Resource Readers	Read to the Master Page Gallery and Restricted Read to the Style Library.	Members of this group are given Read permission to the Master Page Gallery and Restricted Read permission to the Style Library. By default, all authenticated users are a member of this group. **Note:** Do not remove all authenticated users from this group. Because Master Page Gallery and Style Library are shared across all sites in the site collection and must be accessible to all users of all sites. If you remove all authenticated users from the group, anyone with this permission level on a subsite will not be able to render the site. SharePoint will not automatically add or remove users of subsites to or from this group as needed.
Quick Deploy Users	Contribute to the Quick Deploy Items library, plus Limited Access to the rest of the site	Members of this group can schedule Quick Deploy jobs.
Approvers	Approve, plus Limited Access	Members of this group can edit and approve pages, list items, and documents.
Hierarchy Managers	Manage Hierarchy, plus Limited Access	Members of this group can create sites, lists, list items, and documents.

Note:

The Limited Access permission level is used to give groups access to a specific list, library, folder, document, or item, without giving them access to the entire site. Do not remove this permission level from the groups listed above. If this permission level is removed, the groups might not be able to navigate through the site to get the specific items with which they need to interact.

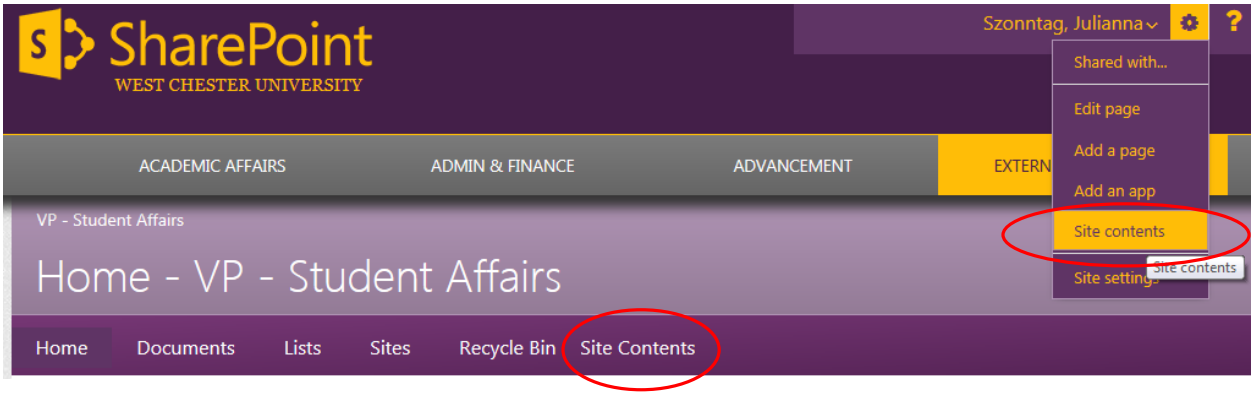
Make most users members of the Visitors or Members groups. By default, users in the Members group can contribute to the site by adding or removing items or documents, but cannot change the structure, site settings, or appearance of the site. The Visitors group has read-only access to the site, which means that they can see pages and items, and open items and documents, but cannot add or remove pages, items, or documents.

Site Admins and Site Collection Admins are two **DIFFERENT** types of individuals. Site Collection admins have full access to all data in a site collection, despite what a site/library/list item indicates. Site Owners have full control over the site to which they are given ownership, but only to that site.

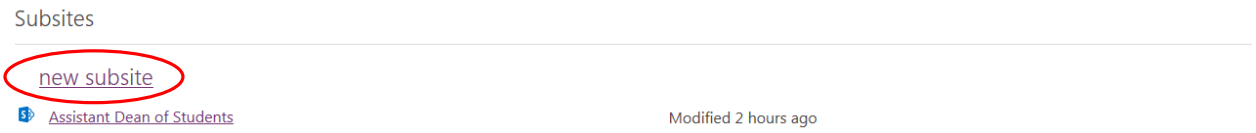
CREATE A SITE BASED ON A TEMPLATE

A team site comes with announcements lists, discussion boards, document libraries, a calendar, a links list, a wiki page library, and a task list already configured and ready for use. These components of the site allow you and your team to quickly set up and begin collaborating on your projects. **Note:** you can only create a teamsite if you are a member of the owner's group.

1. Click on the Settings Gear Icon and select Site Contents.

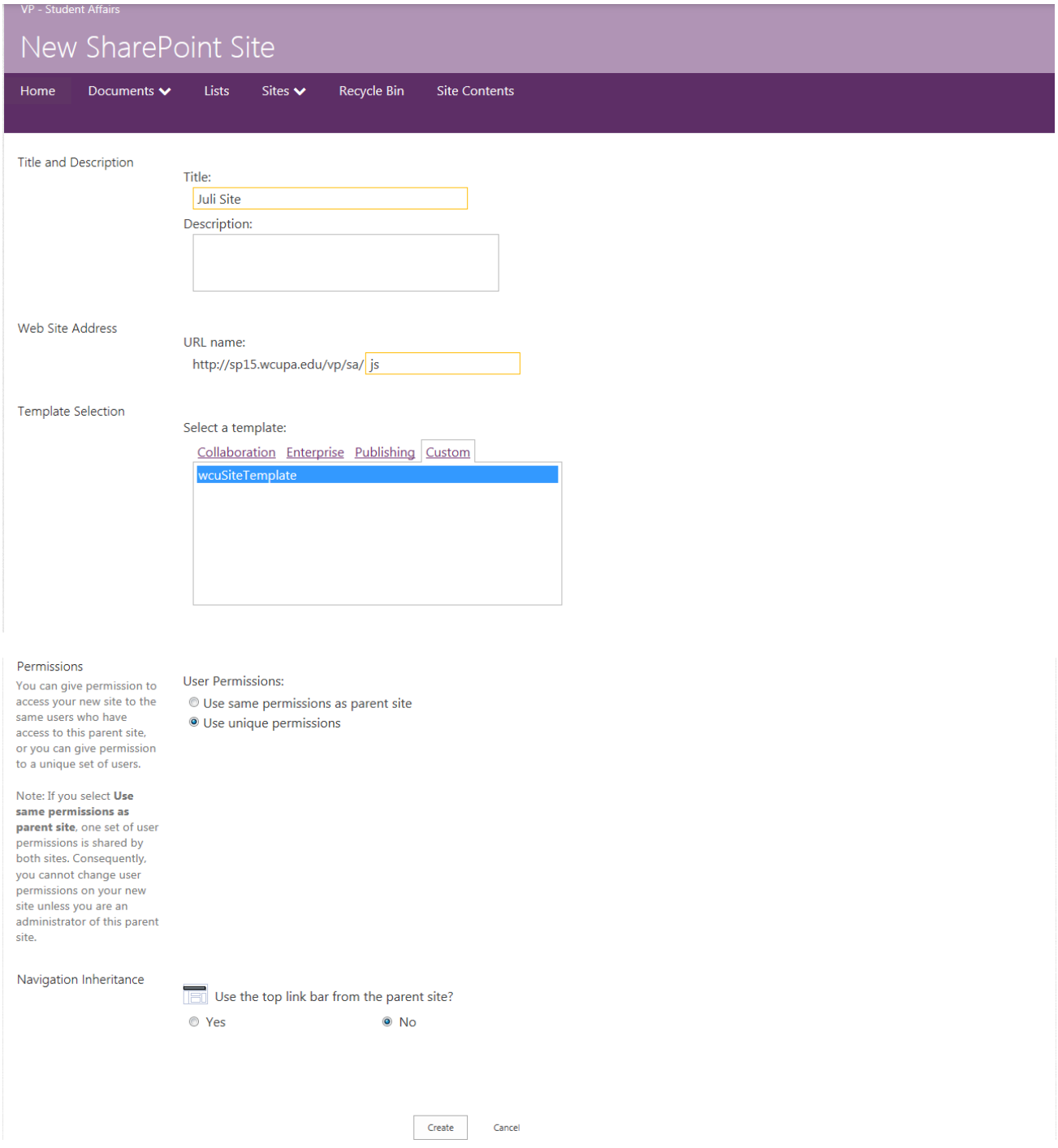


2. Or click on the Site Contents button. Scroll down to the Subsites section and click on New Subsite.



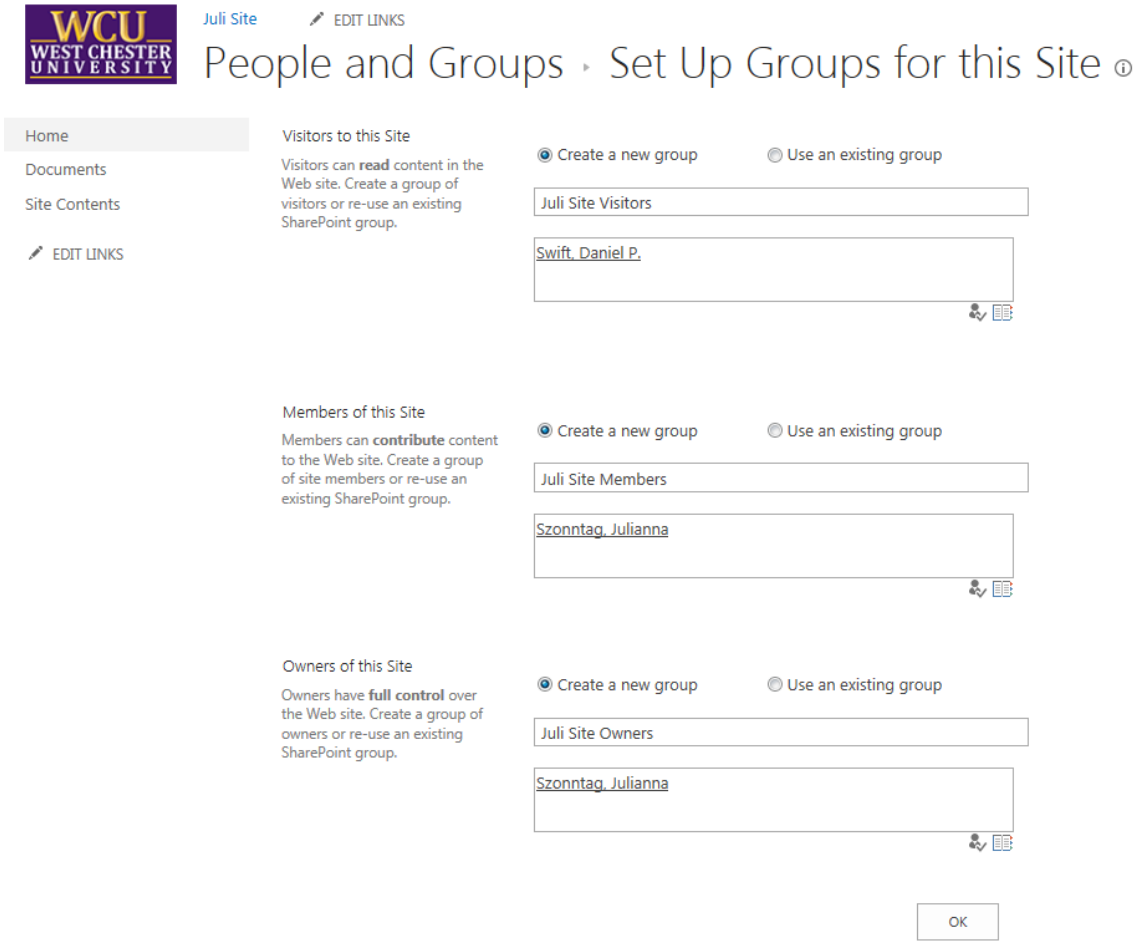
3. Enter a title and description for the site.
4. Enter a URL for the site. **NOTE:** When entering the URL you only need to specify what the site name (last portion of the URL) will be. SharePoint will automatically generate the first portion of the URL. An abbreviation of the name of the new site should be used for the URL. For example if the site name is SharePoint Bootcamp then **sb** should be used for the URL.
5. Select the Custom tab under Select a template. Make sure wcuSiteTemplate is highlighted.
6. Select if you want to inherit permissions from the parent site (use same permissions as parent site) or use unique permissions.
7. Use the top link bar from the parent site the default is No. The top link bar is part of the branded template therefore you can leave the default answer of No.

8. Click Create.

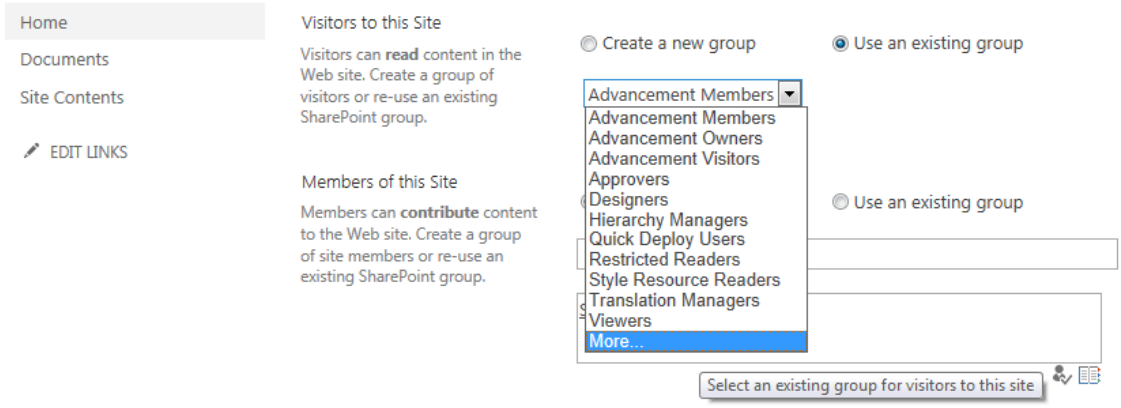


By selecting Use unique permissions, the Set Up Groups for this Site window will appear. Use this page to specify who can access your site. You can create new SharePoint groups or re-use existing SharePoint groups.

1. Create a new group is the default. The name of the new group is already added for you. You can add users to the group by typing in their username in the box or searching for their name using the address book **Note:** you can only add, change, delete permissions if you are a member of the owner's group.

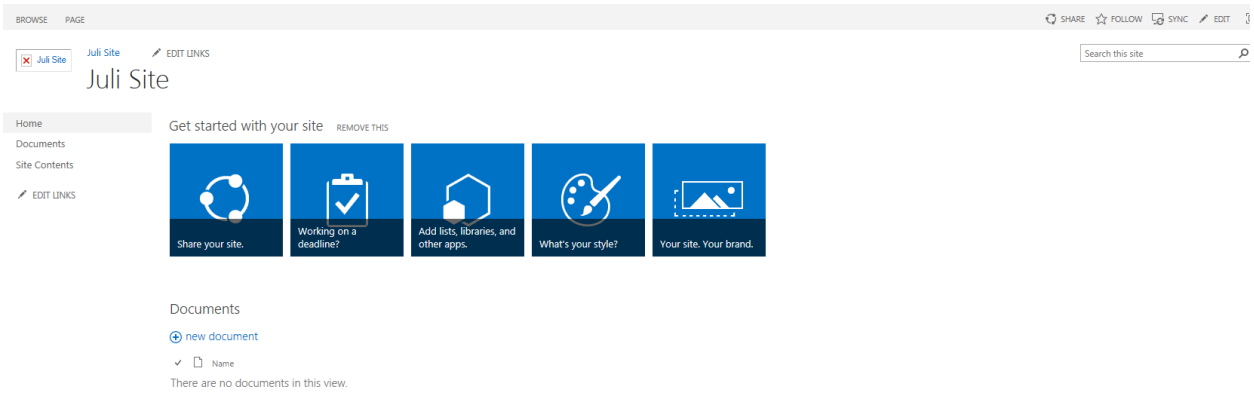


2. If you would like to use an existing group click the Use an existing group radio button. Select from the drop down list. Click on More to see all the SharePoint groups.

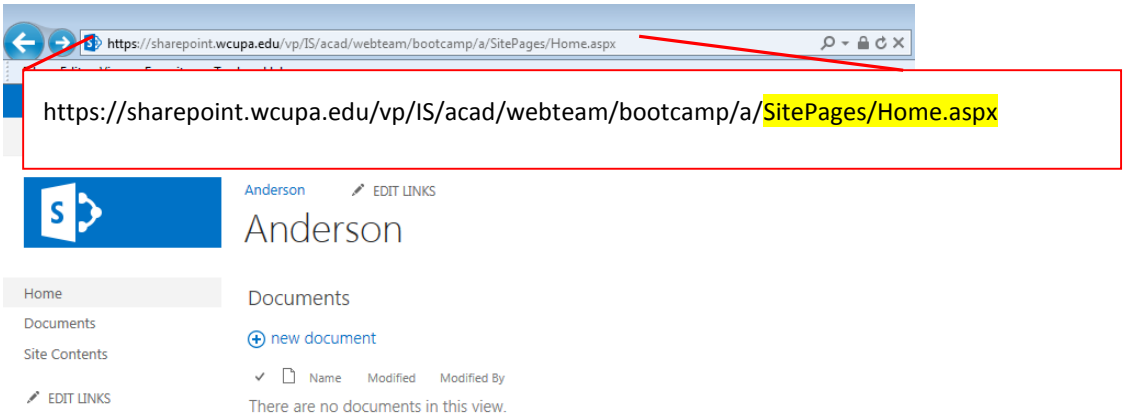


3. When you are finished adding all the groups and users click Ok to close the window.

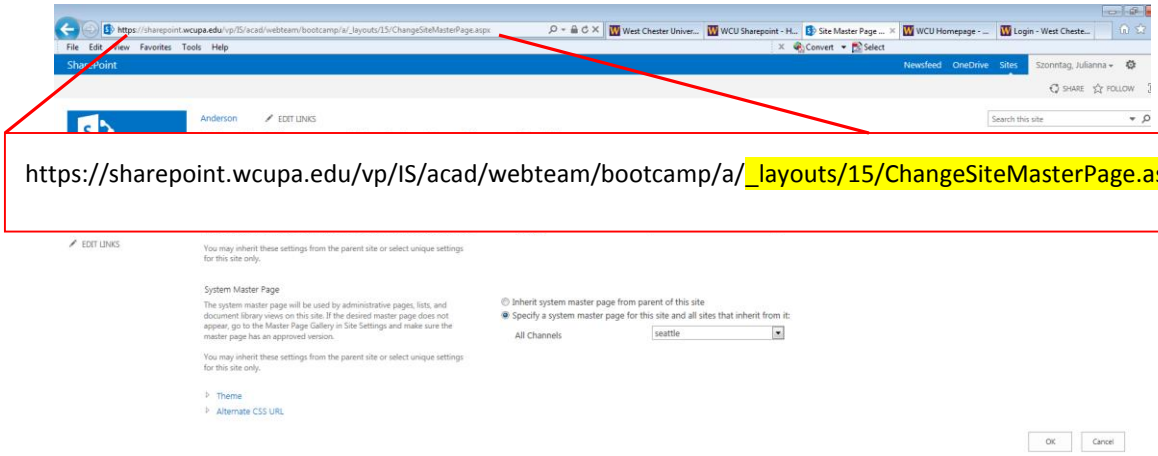
Once you have completed setting up the unique permissions the team site window will appear. **The team site will need to be converted to the branded template.**



1. Change the URL of the new page by removing the highlighted portion of the URL.

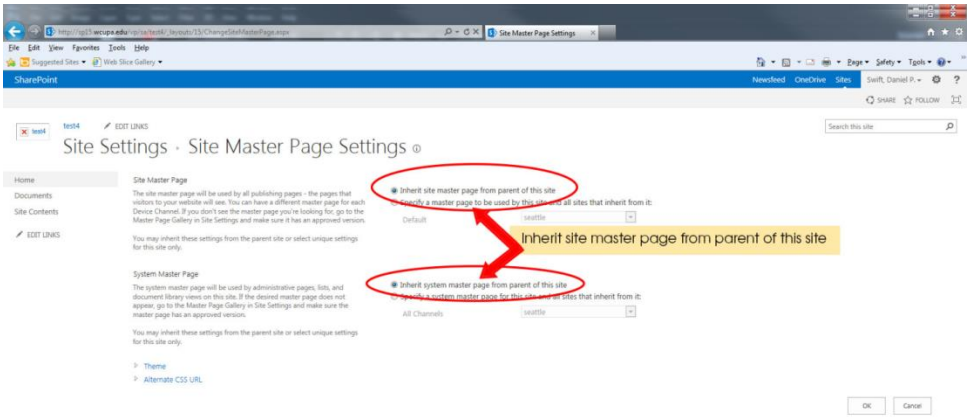


2. Type in the following text: **_layouts/15/ChangeSiteMasterPage.aspx**. The following page will appear.

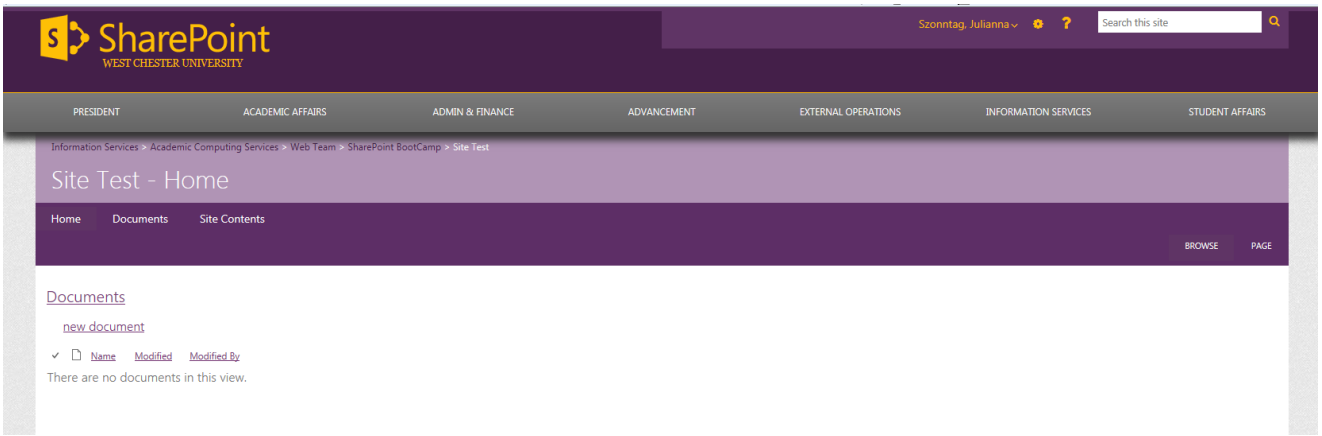


3. Click the radio buttons next to **Inherit site master page from parent of this site** and **Inherit system master page from parent of this site**.

4. Click Ok.



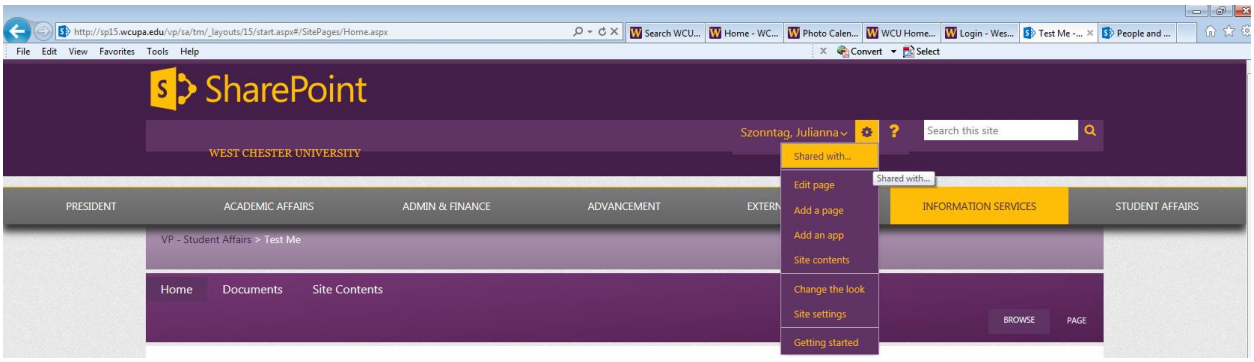
5. Your new team site page should look like this.



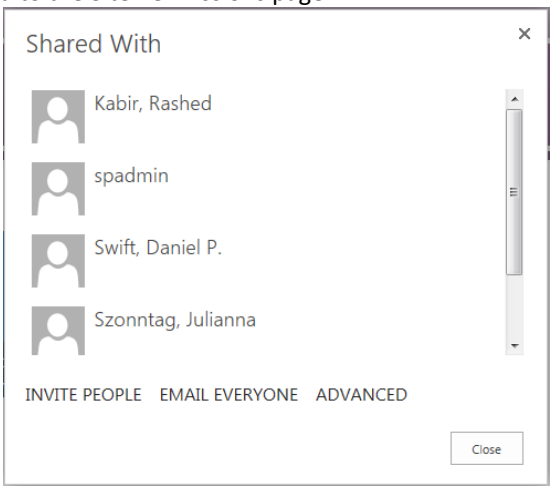
WORKING WITH PERMISSIONS

Note: you can only work with permissions if you are a member of the owner's group.

1. Click on the Setting Gear icon and select Shared with…

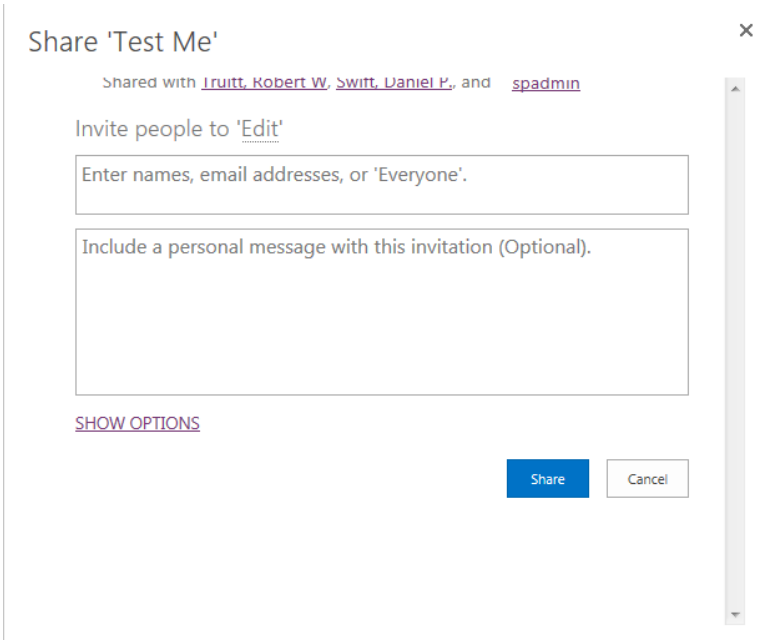


2. From this window you have a few options to choose from:
   - Invite People allows you to give users access
   - Email Everyone gives you the option to send an email to everyone in the group
   - Advanced takes you to the Site Permissions page



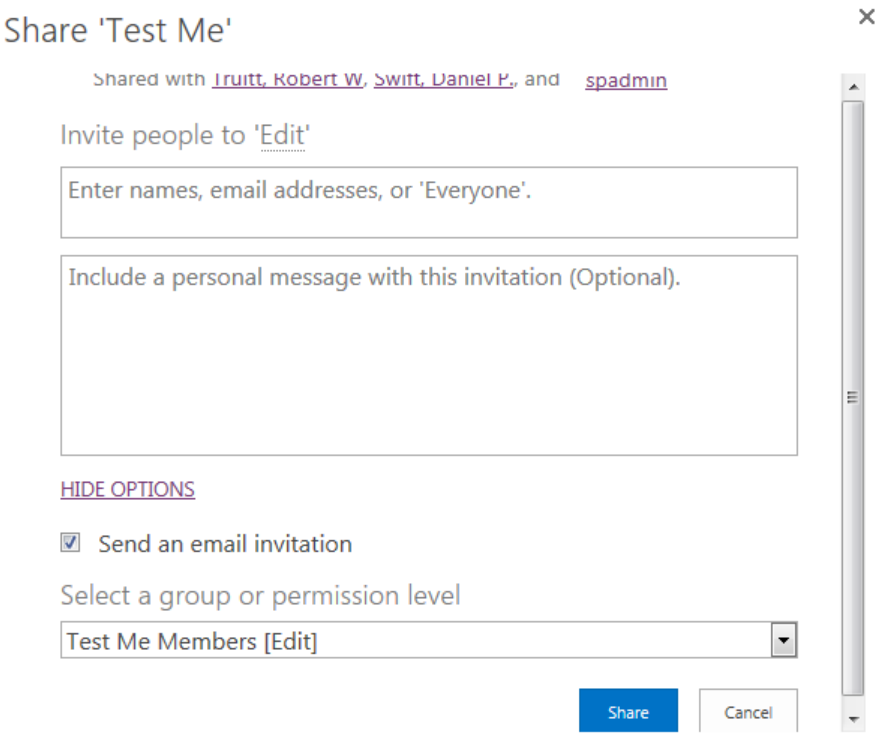
3. Click on Invite People.

4. The following window will appear. The Edit group, which is the same as Contribute, is the default group that appears for this site.

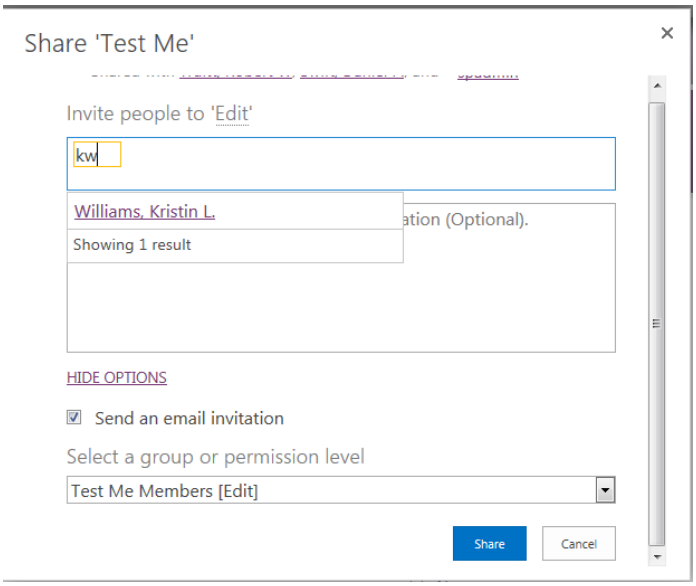


5. Click on Show Options to expand the window for more permission level options. The Edit level is the default level.

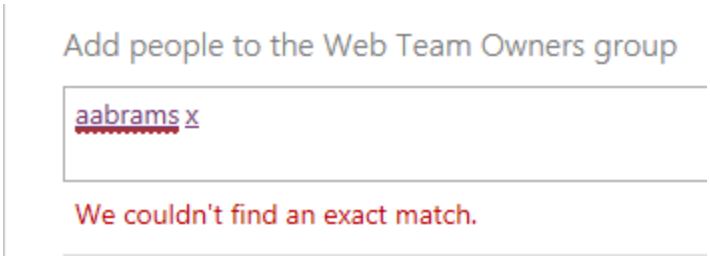
6. Click on the drop down arrow to select a different group.



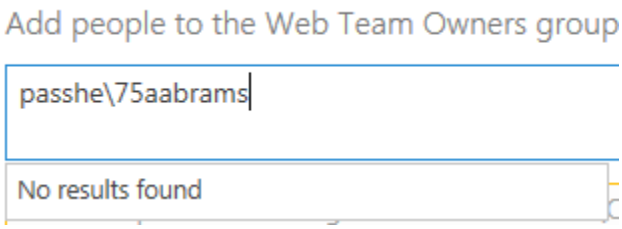
7. Enter the person's username in the Enter names box. As you start to type the person's name suggestions will appear below the name. Select the name that you would like to give access to.



8. If you add a user name and a red line appears under the name with the phrase “We couldn’t find an exact match” click on the name to resolve it. If no options appear you will need to add their name in a different way.



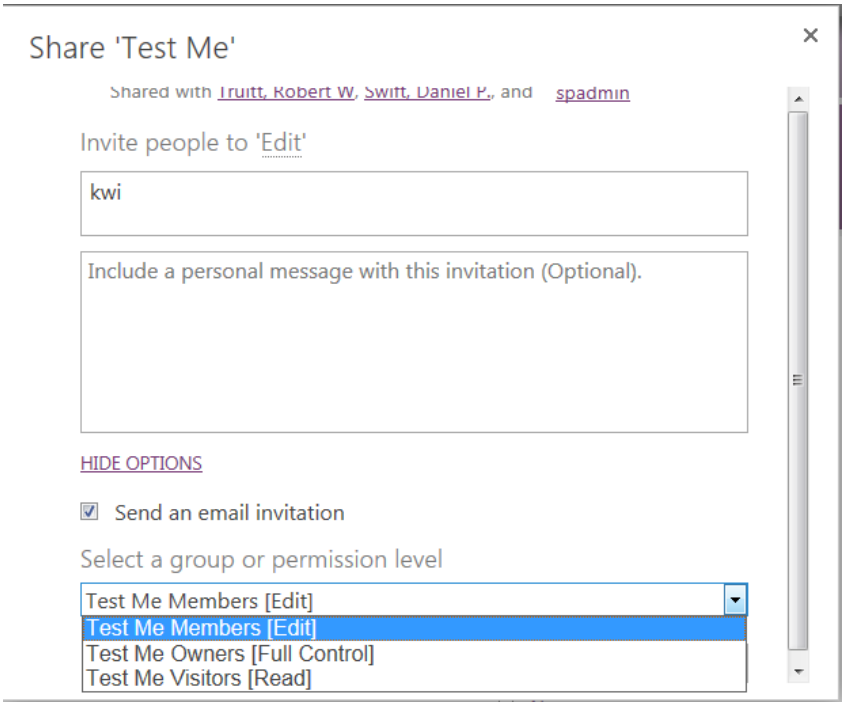
9. Add the user’s name by typing **passhe\75username; (make sure to add a semicolon after the username)**.



10. Hit Enter, the name should resolve.

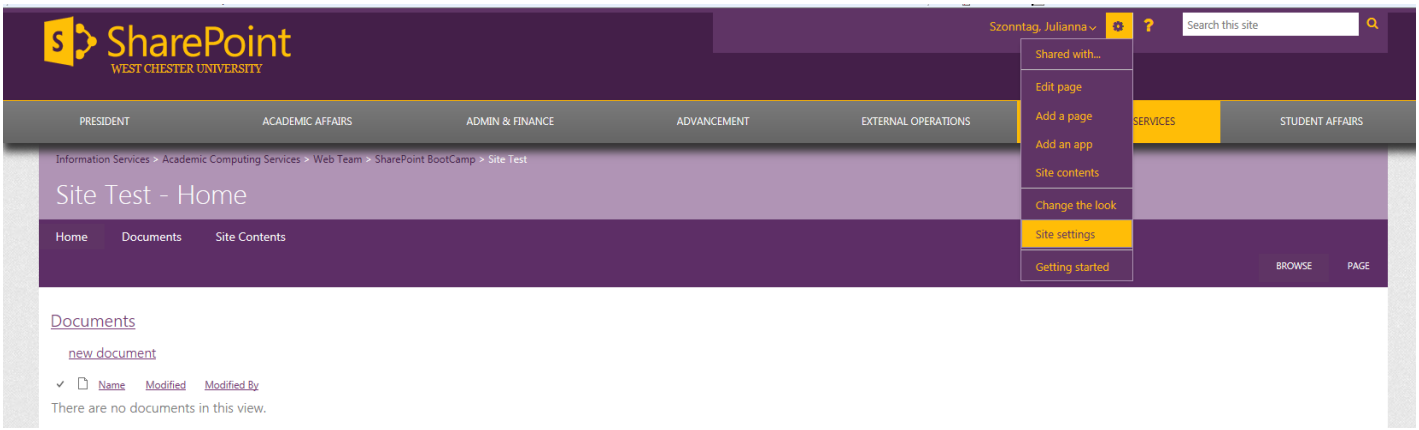
11. Under Option The Send an email inivitation box is checked by default. You can choose to send an email invitation or uncheck the box if you do not wish to send an email.

12. Select a group to add the person to by clicking on the drop down menu and selecting from the list.

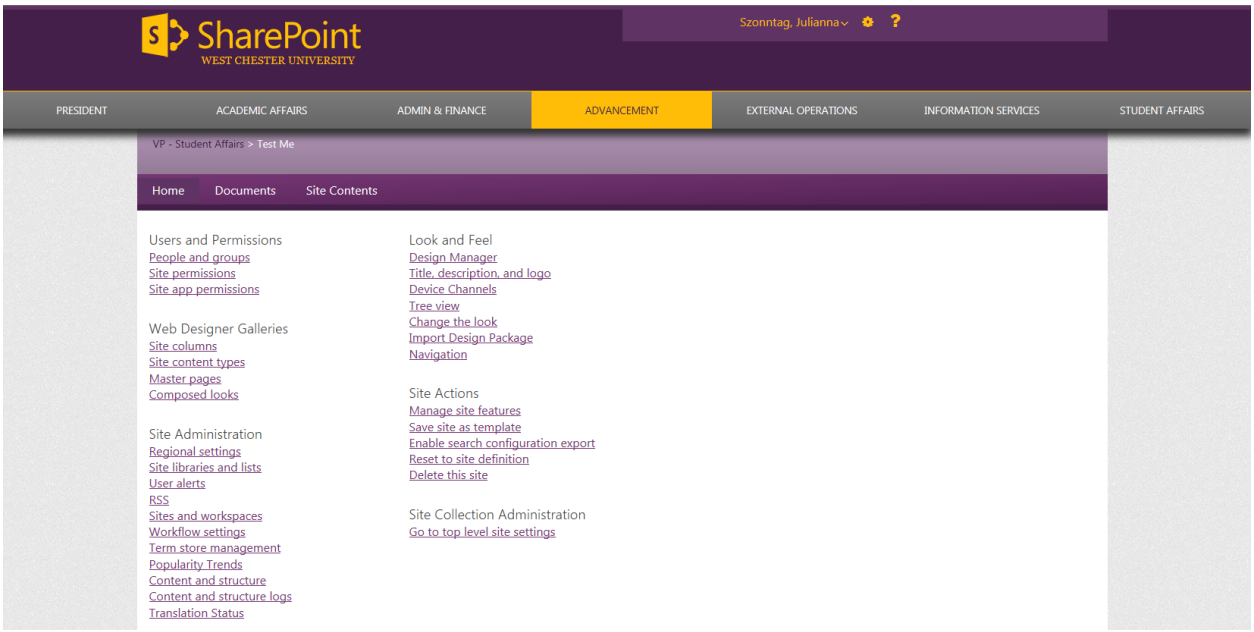


13. Click Share when complete.

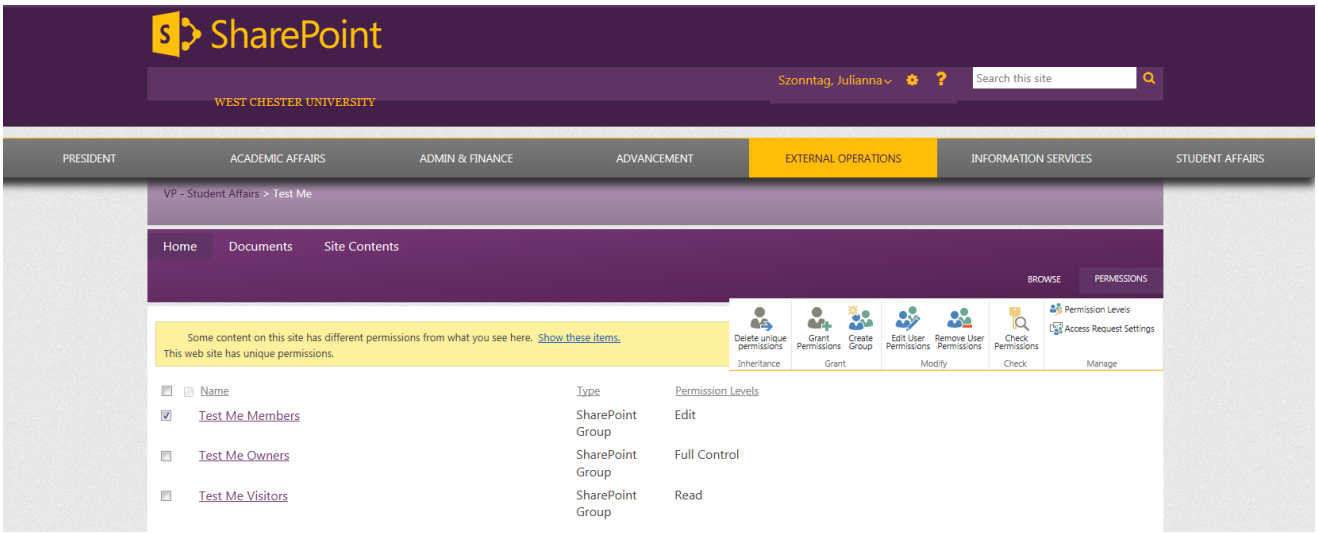
14. You can also grant users permission by clicking on the Settings Gear icon and selecting Site settings.



15. Under Users and Permissions click on Site permissions

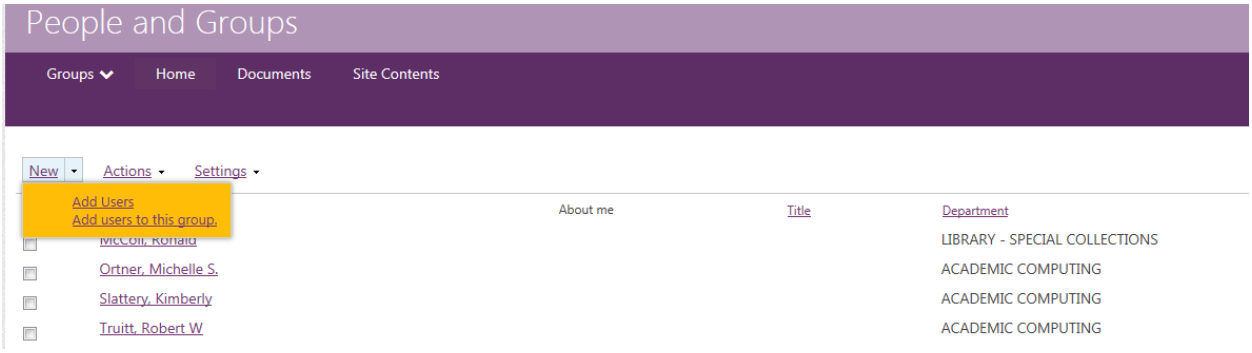


16. From this window you can grant permissions to groups, remove groups, edit user permissions and see what content on the site has unique permissions.



17. To add a user to a group click on the group.

18. Click on New and select Add Users to this group.



19. Add a user as instructed in the previous steps.

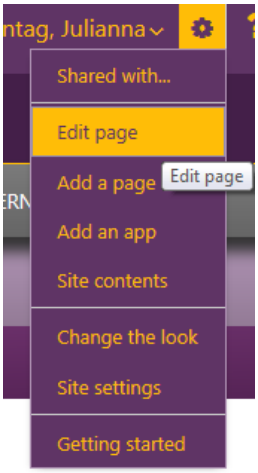
EDIT A TEAMSITE

The number and types of controls that appear on the ribbon vary according to context and depend in part on the type of page you are viewing, the level of control that your administrator has granted to users, and your permission level within the site. Tabs, groups, and commands on the ribbon are contextual. Therefore, the ribbon commands available to you change depending on where you are and what you are doing.

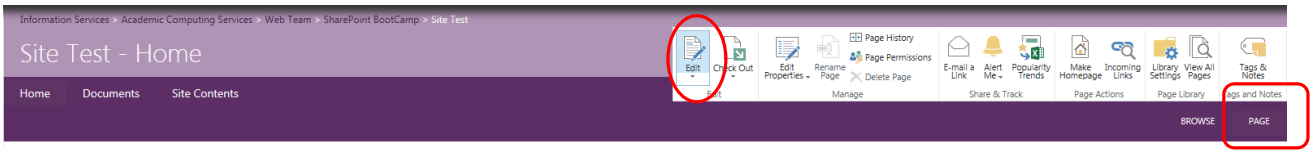
Note: You need to be a member of the owner's group to be able to edit the teamsite page.

The Edit Page function can be found in 2 places.

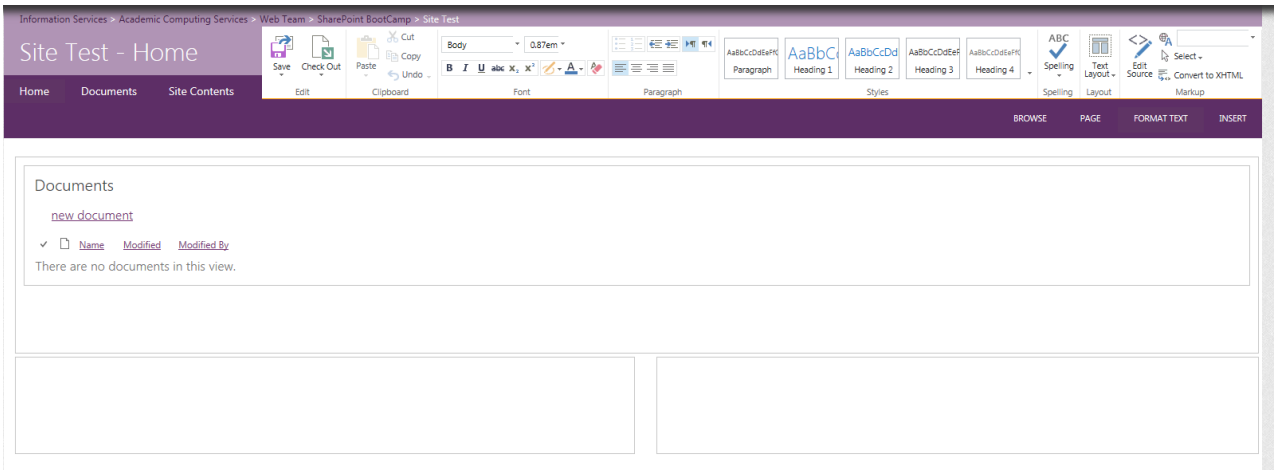
1. You can click on the Setting Gear drop down menu:



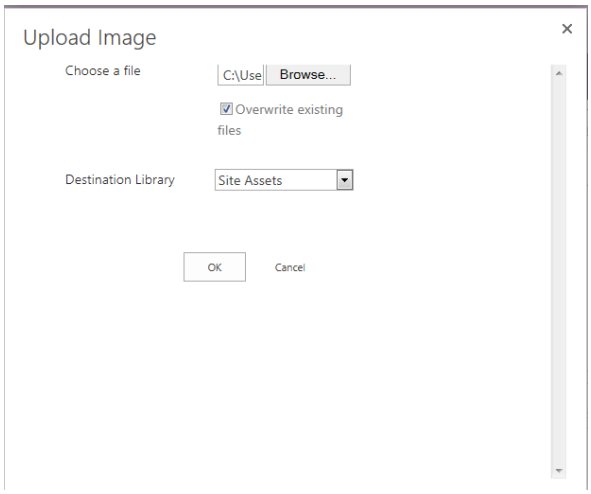
2. Or you can click on the Page option on the Quick Launch bar and click on the Edit button.



3. The page will open in edit mode.

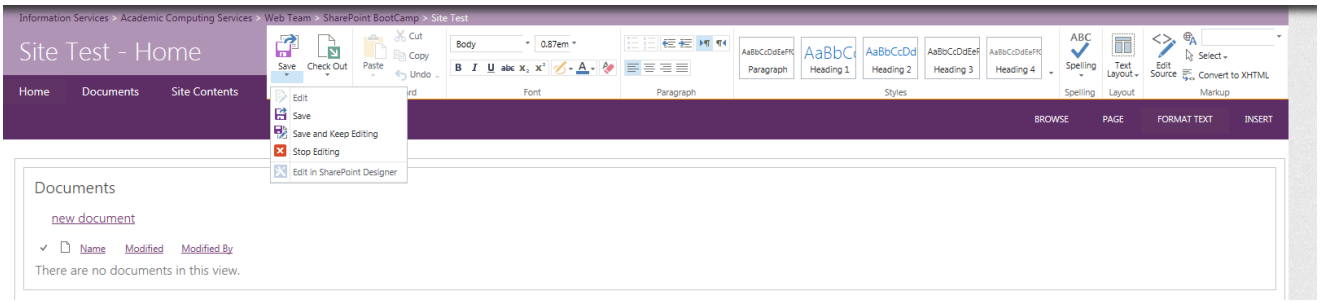


1. The Quick Launch bar options will change depending on which area of the page you are editing.
2. To edit text in the Content web part on the site click on Format Text.
3. To add items to the page such as a table, picture or web part click on Insert.
4. If you select a picture stored on your computer it will upload to your **Site Assets** library. The Sites Assets library is the default selection. If Site Assets library does not appear in the Destination Library window click on the down arrow and select it from the list. **Asset Library:** An asset library is a document library that is specially designed to store digital assets such as images, audio files, and videos. This kind of library can be used as a repository for media files that will be used throughout the SharePoint environment, for example corporate logos, training videos, etc



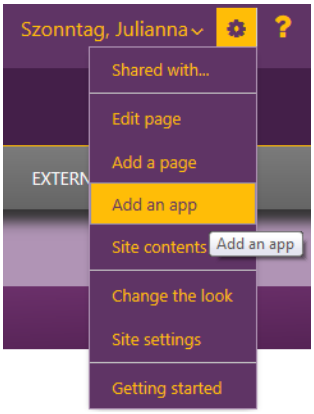
5. To delete a web part select the web part by clicking on it and click on Web Part and select delete.

6. To save your edits click on the Save button drop down and select an option.

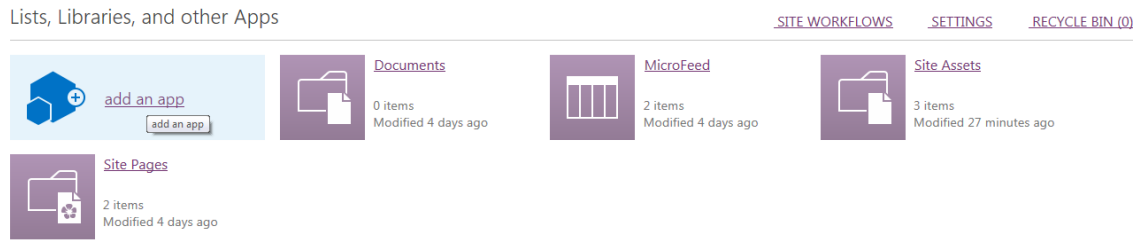


ADD A NEW APP (LIBRARY OR LIST) FROM THE SETTINGS GEAR AND QUICK LAUNCH BAR

1. Click on the Settings Gear and select Add an App

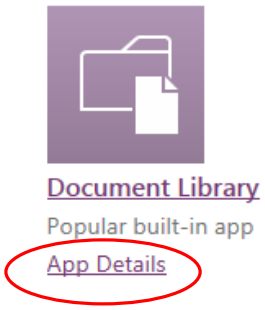


2. Click on Site Contents on the Quick Launch bar and click on add an app

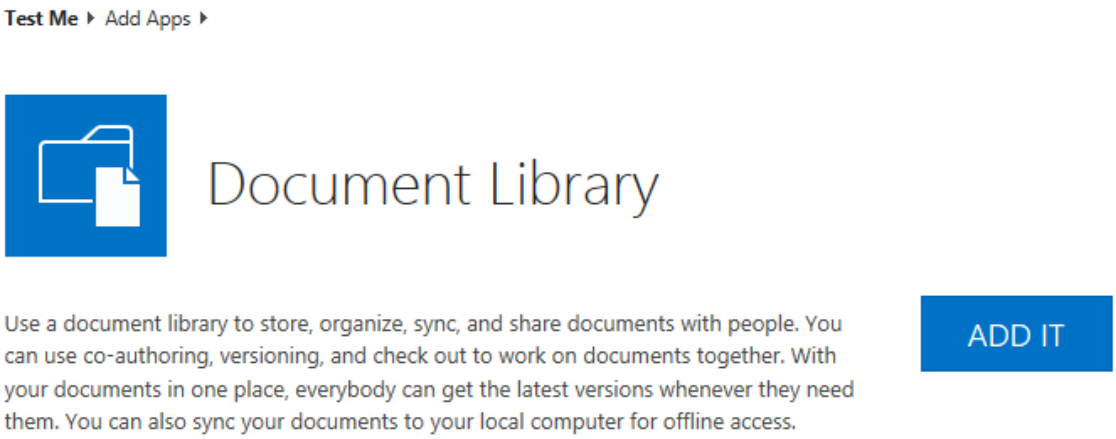


3. A page will open displaying all the apps that are available to choose from.

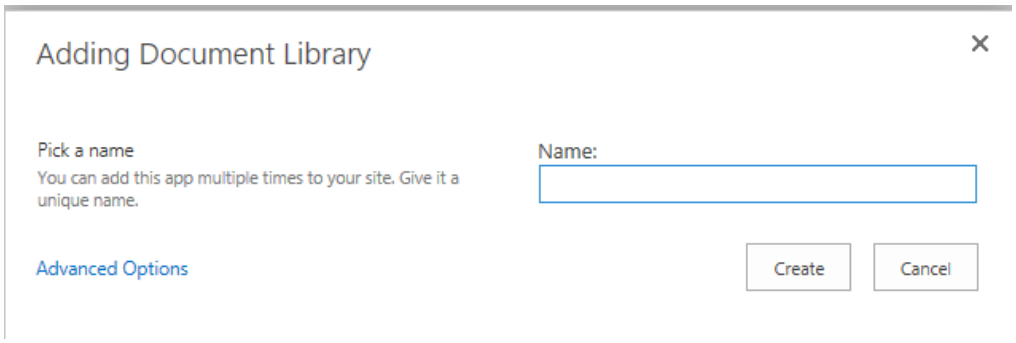
4. To find what the app can be used for click on the App Details link.



5. You have the option to add the app from here by clicking on Add It.

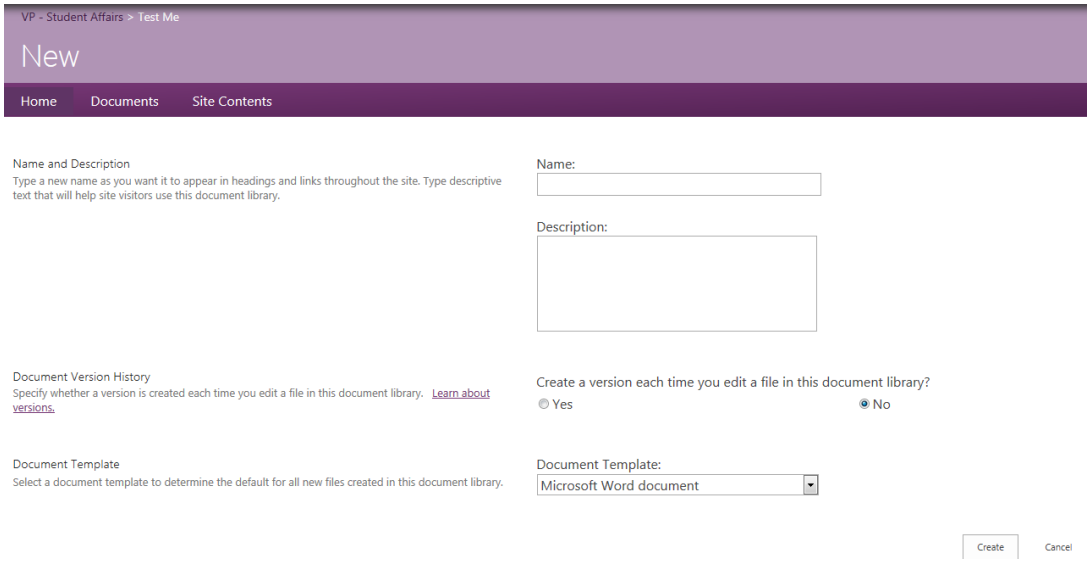


6. Click on Add It and the following window appears.



7. Click on Advanced Options to see all the options for creating an app.
8. To create a version each time a document is edited select Yes to Create a version each time you edit a file in this document library. When versioning is enabled, you can see when an item or file was changed and who changed it. If you make a mistake in a current version or you need to restore part of a document that you deleted you can easily replace your current version with a previous version.

9. Click Create when complete.

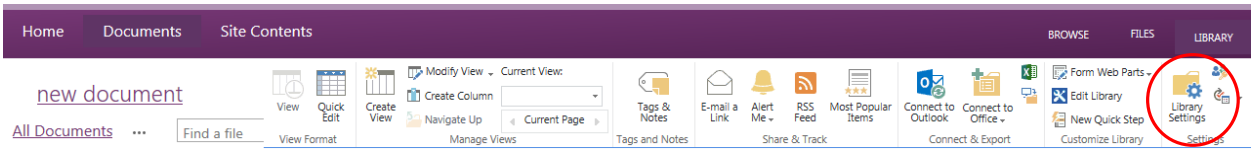


DELETE AN APP (LIST OR LIBRARY)

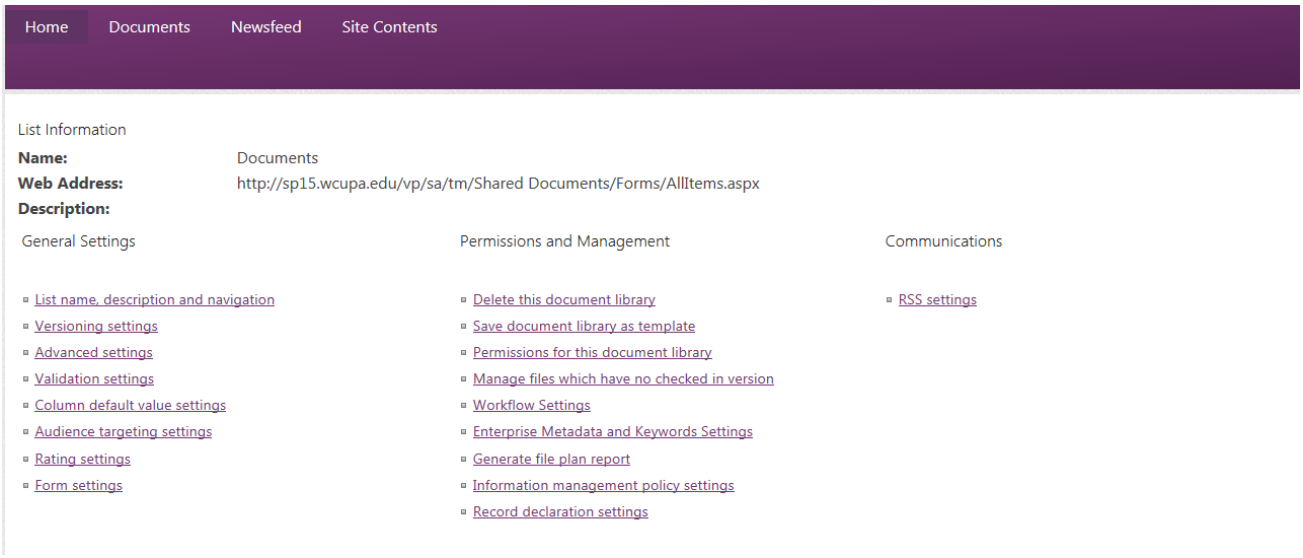
A site might have lists that your team does not require. For example libraries that contain outdated documents or lists with contacts who no longer work in your department. In order to customize the site to meet your team's requirements, you might want to delete any lists that you don't need. Remember, you need the proper persmission level to delete a list or library.

1. To delete a library open the library. Click on the Library tab on the Quick Launch bar.

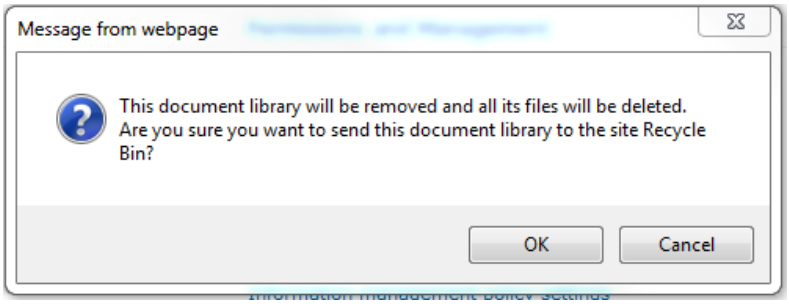
2. Click on Library Settings.



3. Under Permissions and Management click Delete this document library. **Note:** Only site owners can delete libraries and lists.



4. A warning message appears, click Ok to delete the library.

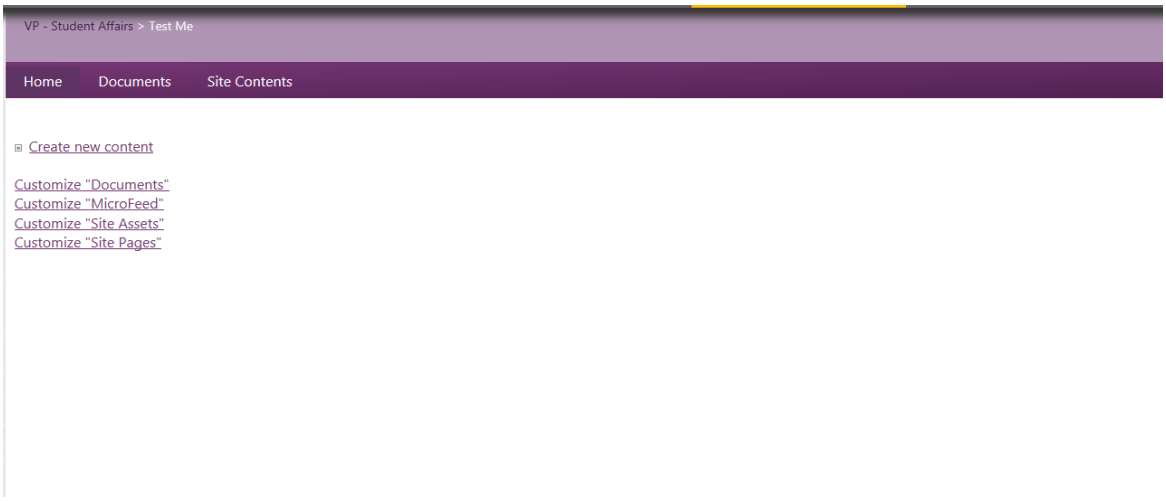


5. To delete a list open the list. Click on the List tab on the Quick Launch bar.

6. Click on List Settings.

7. Under Permissions and Management click Delete this list. A warning message appears, click Ok to delete the list.

8. You can also delete a list from **Site Actions**. Click on Site Actions drop down menu and select Site Settings. Under Site Administration click on Site Libraries and lists. This window shows all the libraries and lists associated with this page.



9. Click on the library or list you wish to delete. Under Permissions and Management click on Delete this library or list.

LIST SETTINGS

In addition to deleting document libraries and lists, list settings provides the following options (only a few are listed here):

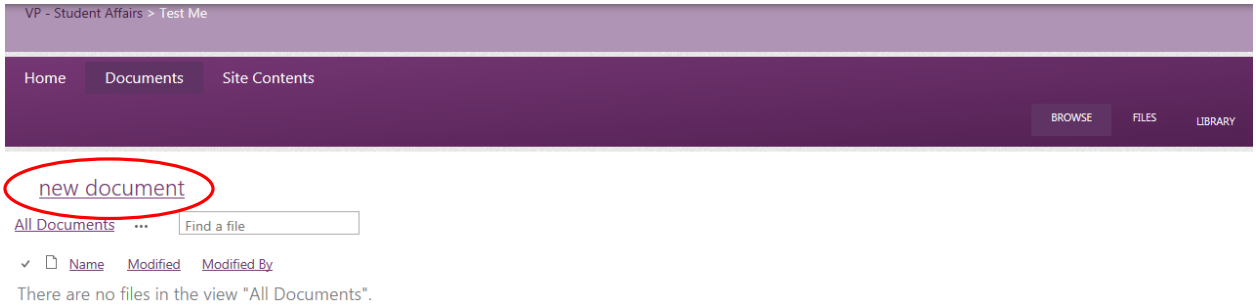
- Hide or show the list name in the Quick Launch by selecting List name, description and navigation under General Settings.
- Turn versioning off or on, select Versioning settings.
- Check permissions for the library, select Permissions for this document library.
- Add or edit columns.

ADD OR UPLOAD DOCUMENTS TO A LIBRARY

There is more that one way to upload a document to a library. You can add a document from inside the library or from the ribbon.

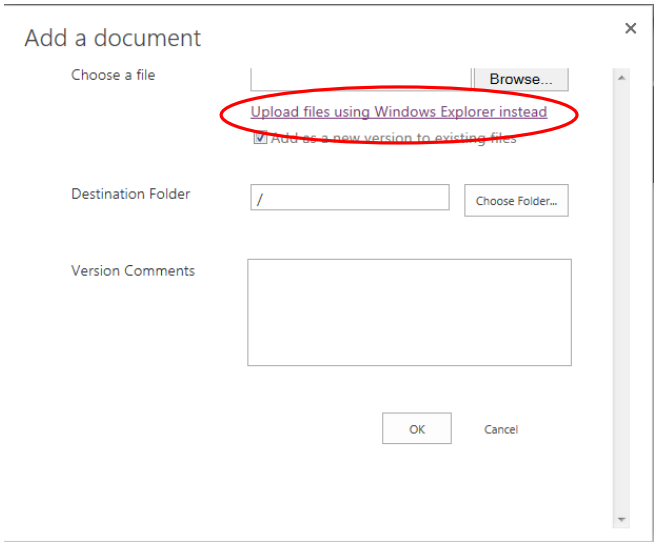
1. Open the document library.

2. Click on new document.

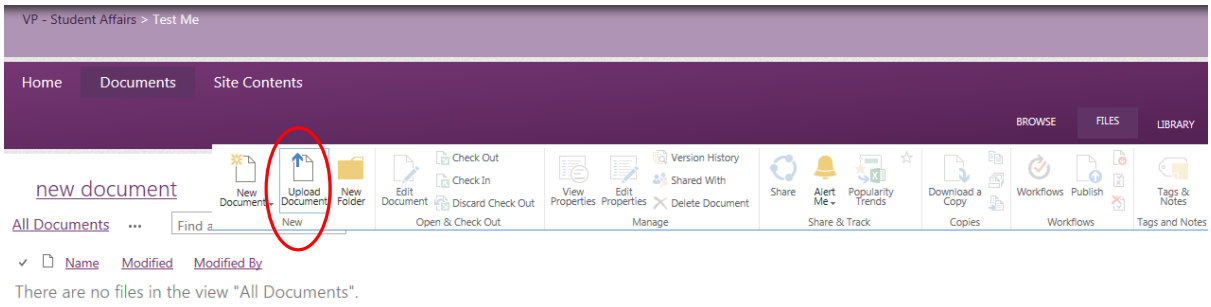


3. An Upload Document window appears. Click on Browse and select the document to be uploaded. Click Ok.

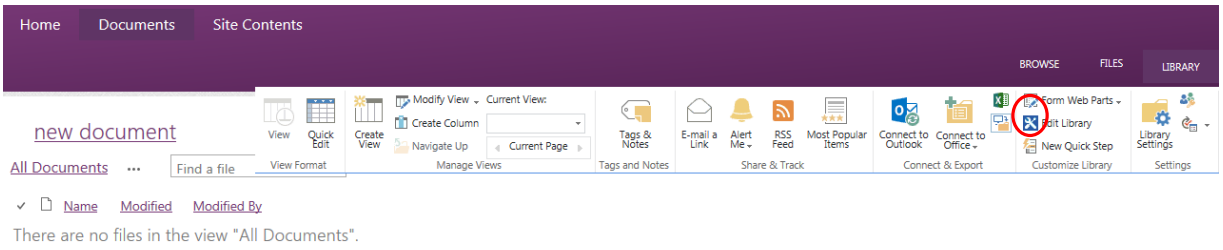
4. You also have the option to upload mulitple documents by selecting Upload files using Windows Explorer instead.



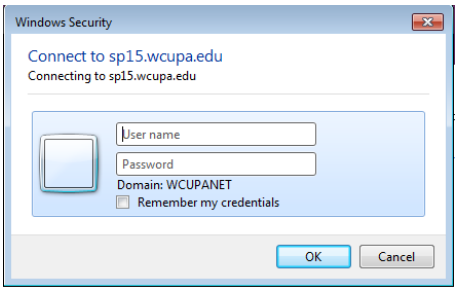
5. Select Upload Document on the Files tab on the ribbon. The same Add a document window will appear as above.



6. To upload multiple documents at a time click on the library tab on the ribbon and select the Open in Explorer view icon.



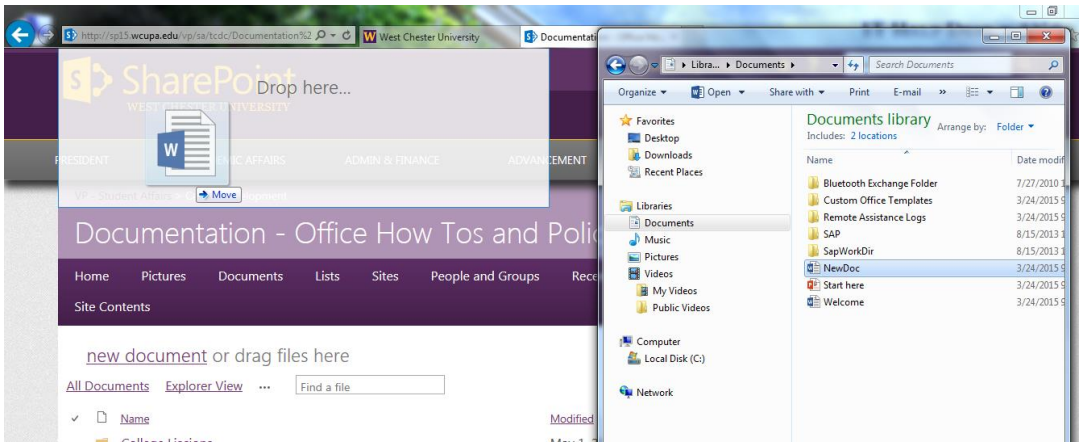
7. A Windows Security login window might appear. Log in using your WCU account.



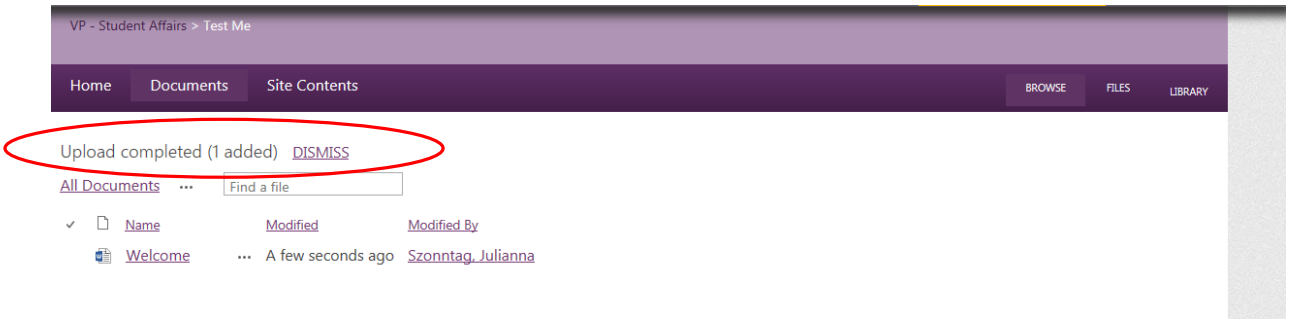
8. If you have Office 2013 installed on your computer you can drag files directly onto the library.

9. Drag a file and drop it onto the new document link and where you see or drag files here.

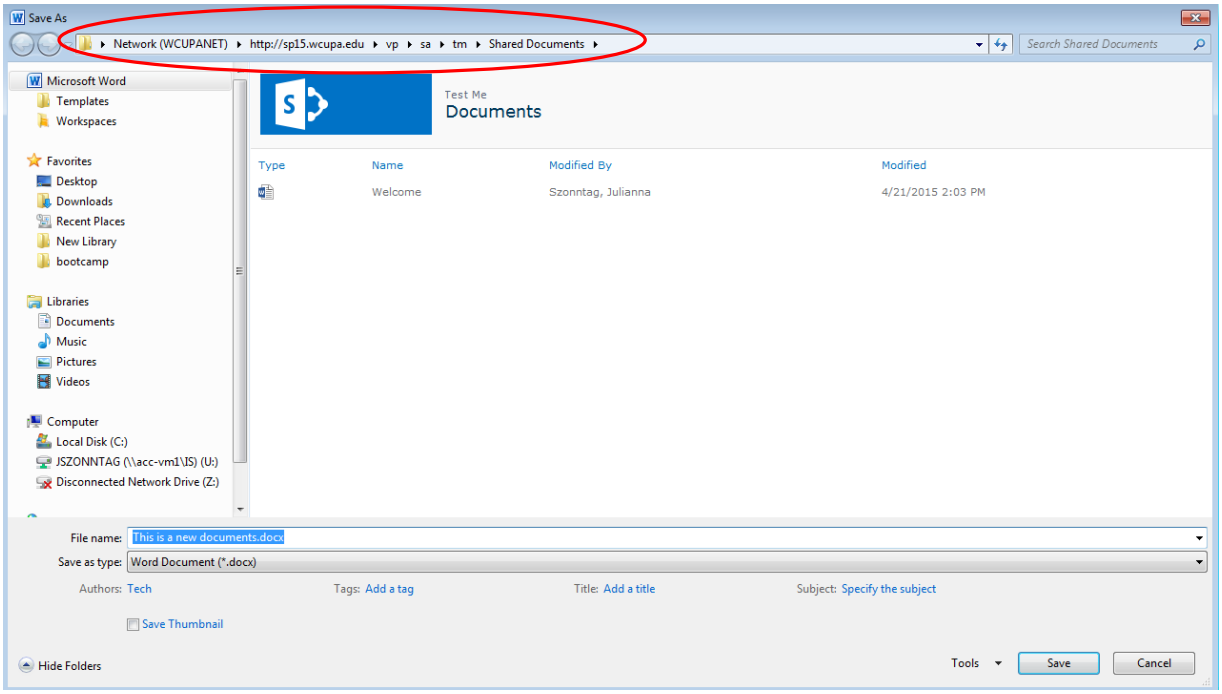
10. A Drop here window appears.



11. An uploaded completed message appears. Click DISMISS to dismiss the message.



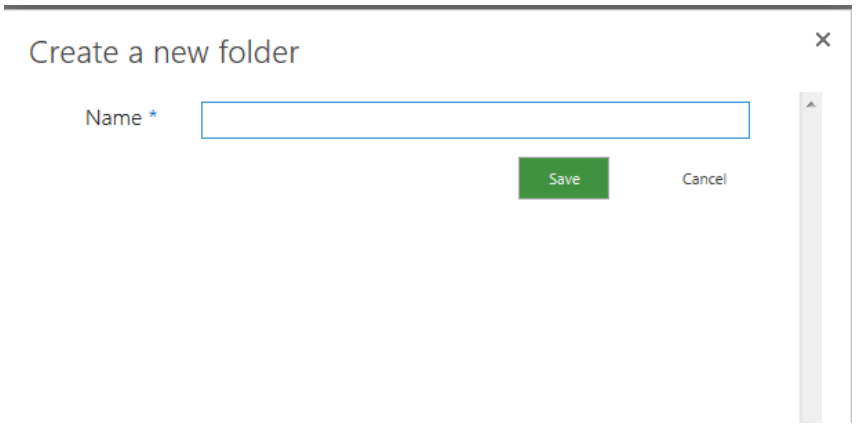
12. You can also create a new document while working in SharePoint. Click on New Document to open Word. When you have completed the document click on File, Save As. Notice that the document will be saved to the document library.



FOLDERS

SharePoint provides the ability for you to create folders in libraries/lists. However, it is important to properly plan and implement your information management strategy so that you will be able to locate, manage and process the information that you have. It is recommended **not to create** folders more than 2 levels deep.

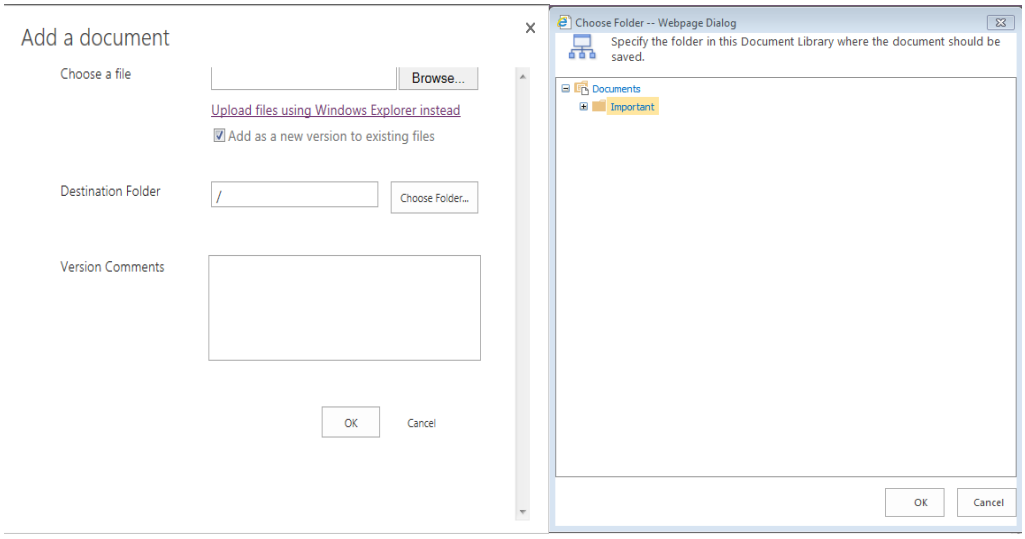
1. Select the library in which you would like to create a folder and click on Files on the Quick Launch bar.
2. Click on New Folder.
3. Give the folder a name and click on Save.



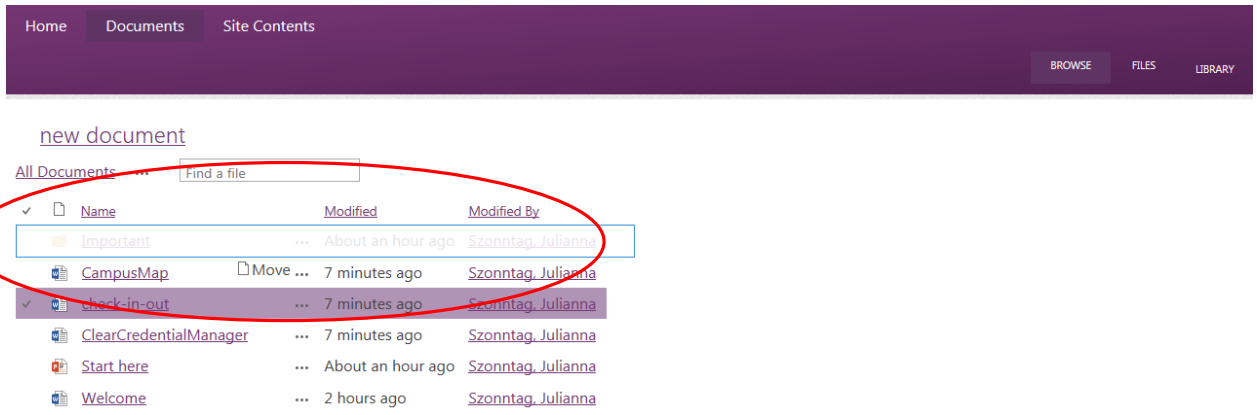
4. To upload a document to the folder click on Upload Document, browse for the document. Click on Choose Folder, a dialog box opens. Expand the Documents Library to see all of the available folders.

5. Select the folder and click OK. The name of the folder will appear in the box next to Choose Folder.

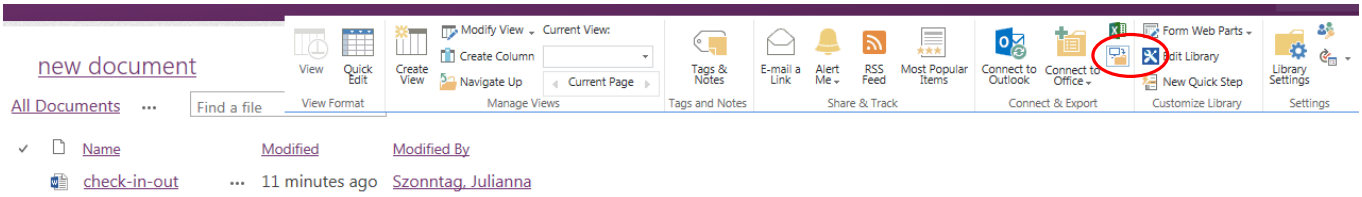
6. Click Ok on the Add a Document window.

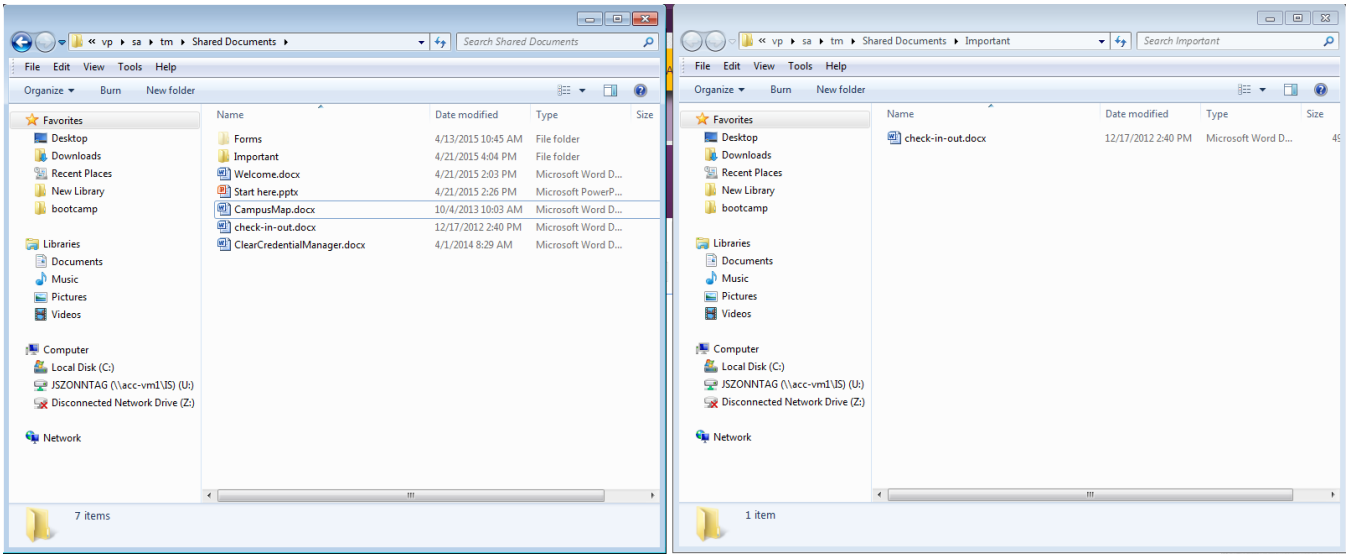


7. You can move a file/files into a folder by clicking and dragging the file from within the library.



8. To move a file from one folder to another open each folder and click on Open with Explorer. Drag the file from one folder to the other. You can also move a file from within a folder back to the library the same way.



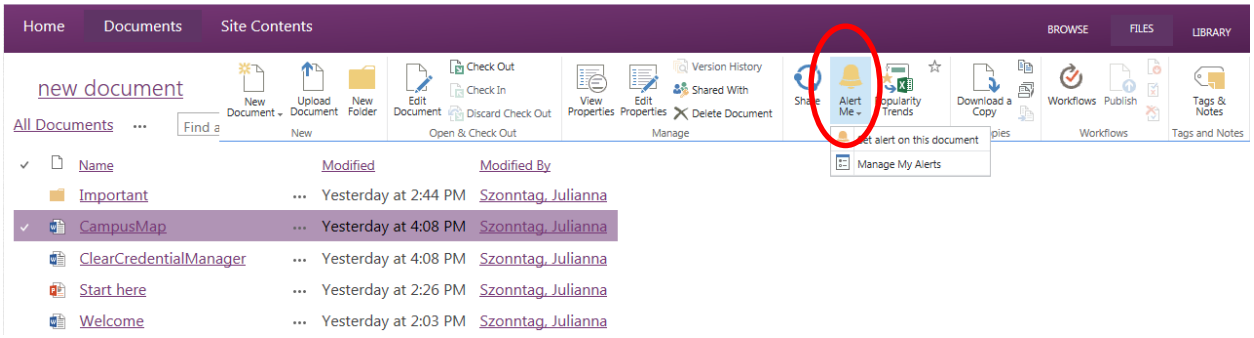


CREATING ALERTS

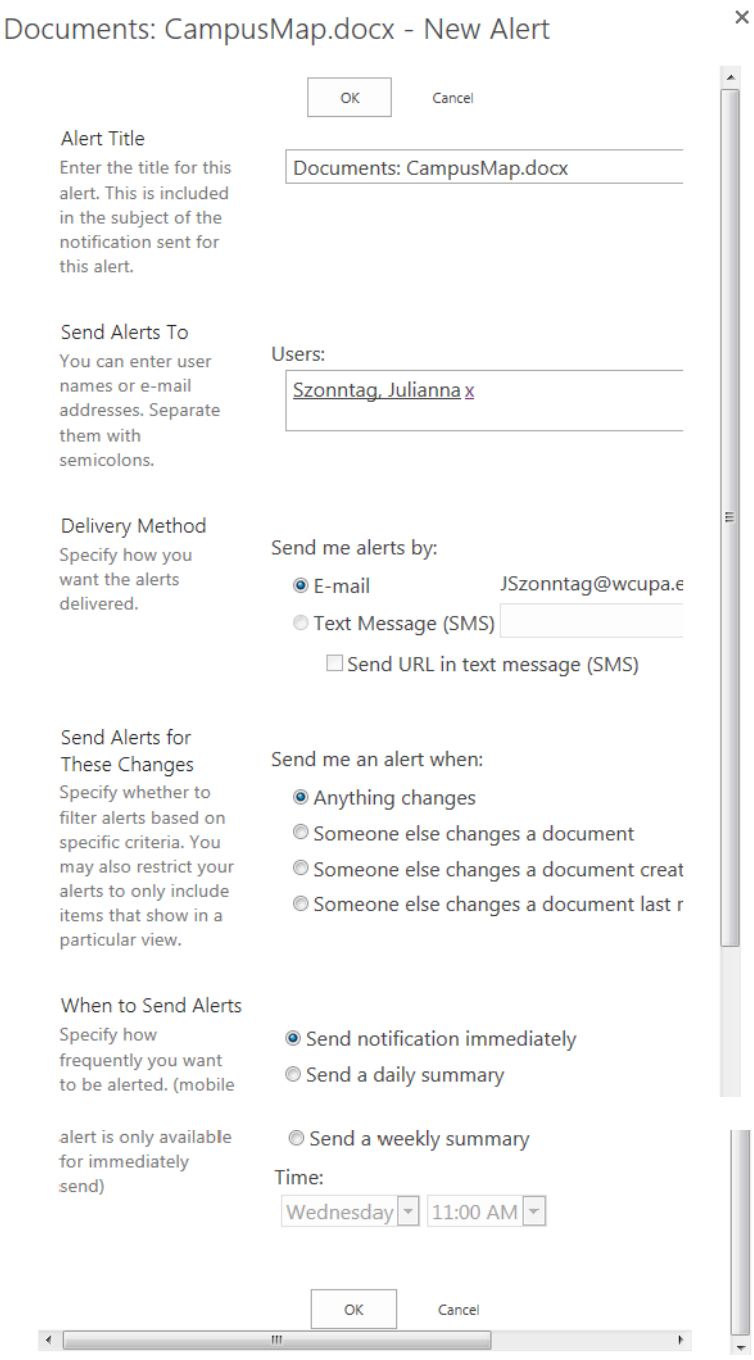
SharePoint alerts send emails when an item in a list or library changes. A user can subscribe at four different levels; a list, a library, a list item, or a document. You can choose to have immediate alerts or daily summaries sent to your inbox. Immediate alerts will appear in your inbox each time a change is made to the item you requested alerts for. A daily summary organizes the changes in a single message. Keep in mind that if you choose immediate alerts your inbox may become inundated with messages.

Creating an Alert from within a list or library:

1. Open the library that contains the document you wish to create an alert for.
2. Click on the Files tab on the Quick Launch bar.
3. Select the file you which to create an alert for.
4. Click on the Alert Me icon and select Set alert on this document.



5. The New Alert window will open. Select your options and click Ok when finished.



OPEN AND EDIT LIBRARY FILES

Files that are uploaded to the Shared Documents Library allows team members to read and make changes to these files. The file check out and check in system is used to edit files in which an orderly sequence of changes is created and each member can be assured that their changes are not lost or overwritten. Do not configure your site library to require checkout if people plan to co-author documents in the library. People cannot work simultaneously on documents when required check-out is in effect.

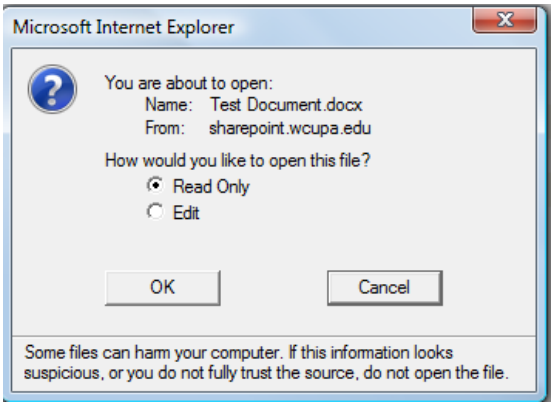
Versions: are successive copies of a document that are created each time the file is modified. A version number is assigned to each copy. The version number, a description of the modification, and the date the file was modified are all visible in the document library. Using versions allows a file to be reverted back to an earlier copy or recovered if it is accidentally deleted. Versioning is not enabled in SharePoint by default, but it can be enabled by the site owner. Both lists and libraries are able to use versioning.

Note: When you check out a file you can edit and save the changes as many times as you want without creating new versions. A new version is not created until you check the file back into the library.

Major vs. Minor Versions: Versions are classified as either major (e.g. adding, changing, or deleting large sections of text) or minor (e.g. updating a few figures in a spreadsheet or changing the wording of a sentence). Major versions are indicated by whole numbers (1.0, 2.0, 3.0, etc.), while minor versions are indicated by decimals (1.1, 1.2, 1.3, etc.)

OPEN A READ-ONLY COPY OF A LIBRARY FILE

1. Use the Quick Launch bar to navigate to the library that holds the file you want to open.
2. Click the name of the file.
3. If prompted, verify that Read Only is selected and click OK.

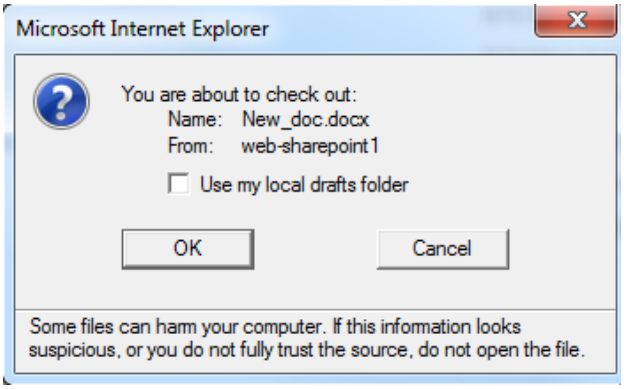


OPEN A LIBRARY FILE FOR EDITING

1. Use the Quick Launch bar to navigate to the library that holds the file you want to open.
2. Click the name of the file that you want to open.
3. Click Edit, and click OK.
4. When the application and file have opened, perform the necessary edits.
5. Save and close the file.

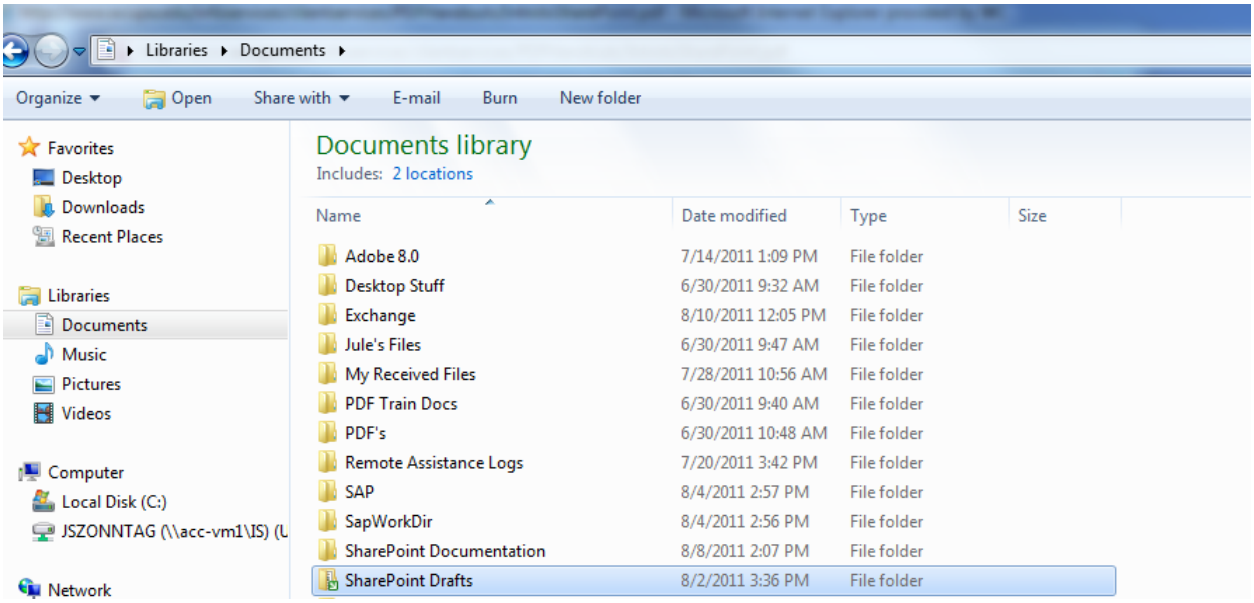
CHECK OUT A FILE

1. Navigate to the library that holds the document you need to check out.
2. From the document's drop-down menu, choose Check Out.
3. The following dialog box appears. Here you have the option to check out the document to a local drafts folder. A local drafts folder is used to store the file locally so that you can work with it offline.

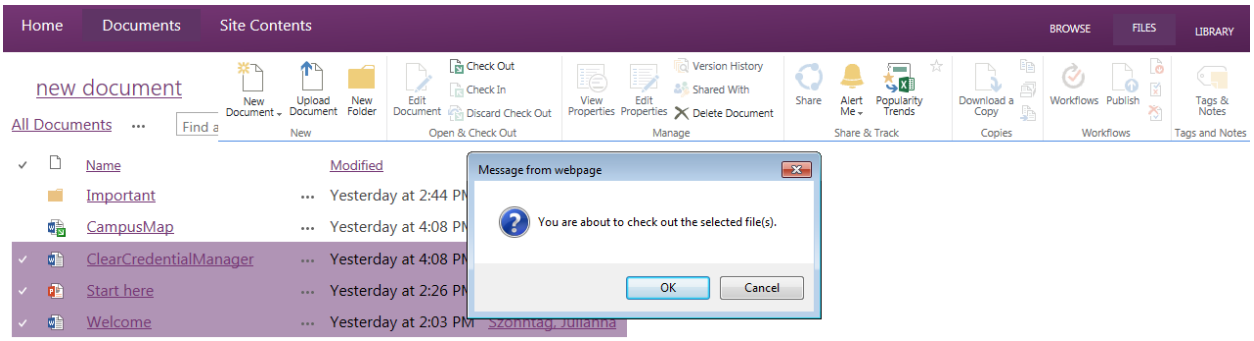


Note: If the file is already checked out the Check Out option will not appear in the drop-down menu. The document Type icon will display an arrow pointing down and to the right when a document is checked out . To find out who has the file checked out hover the mouse over the file icon. The name of the person who has checked it out is displayed in a tooltip.

4. Click OK.
5. If you selected Use my local drafts folder to find the file open your Documents folder on your hard drive and double click SharePoint Drafts to display the checked out file.



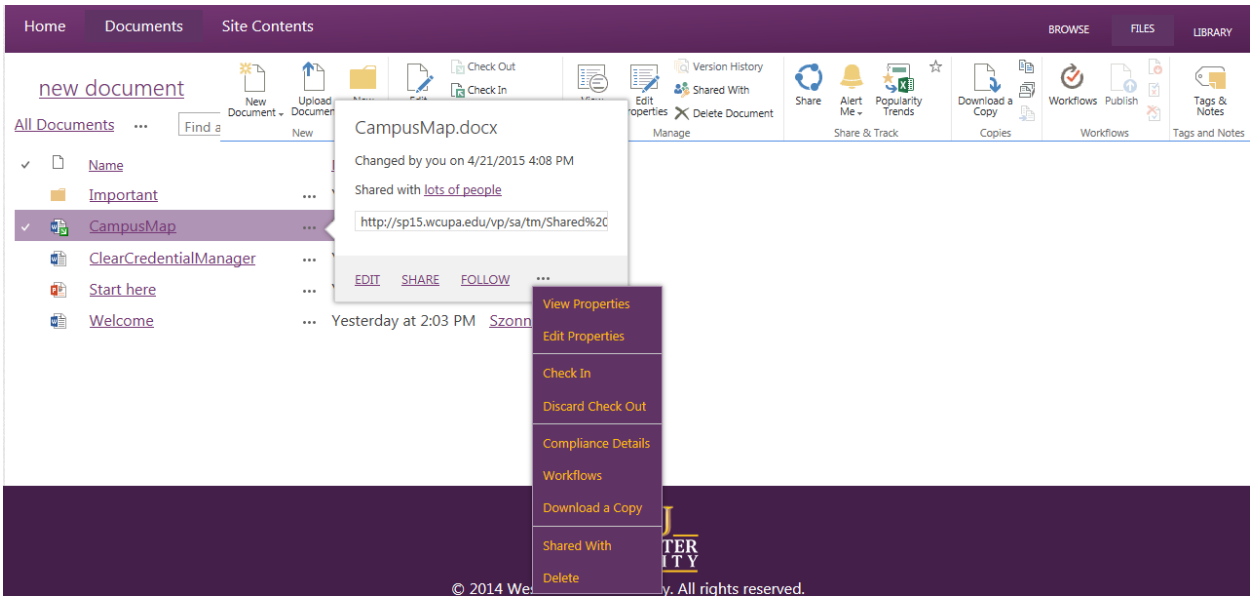
6. To check out multiple documents select the documents you would like to check out.
7. Click the Files tab on the Quick Launch bar.
8. Click Check Out.
9. Click Ok.



CANCEL A FILE CHECK OUT

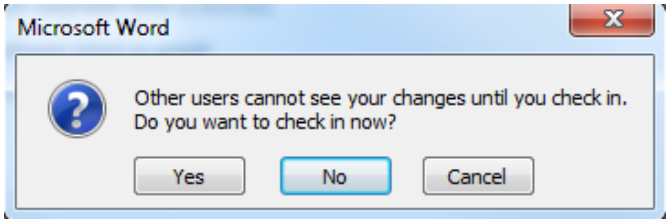
1. Navigate to the library that holds the document that is checked out.
2. From the document's open menu link, choose Discard Check Out.
3. To confirm that you want to discard the checkout, click OK.

Note: All changes made to the file while it was checked out will be lost.



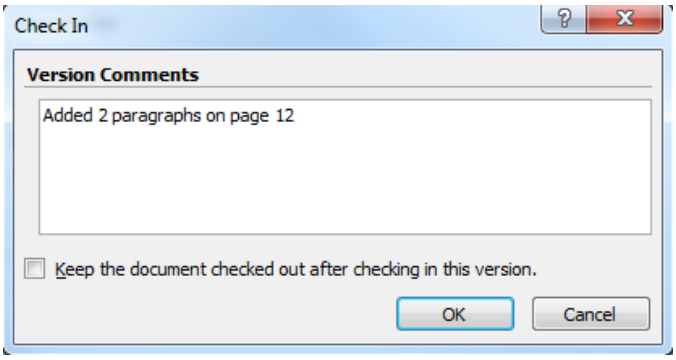
CHECK IN A FILE

1. After you have edited a checked out document, save and close the file. You will be prompted to check the document back into SharePoint.



   - If your edits are complete, click Yes.
   - If you have more edits to complete, click No.
   - If you want to return to the document without closing it, click Cancel.

2. If you click Yes in the previous step, the Check In dialog box is displayed. Enter a comment in the Version Comments text box.

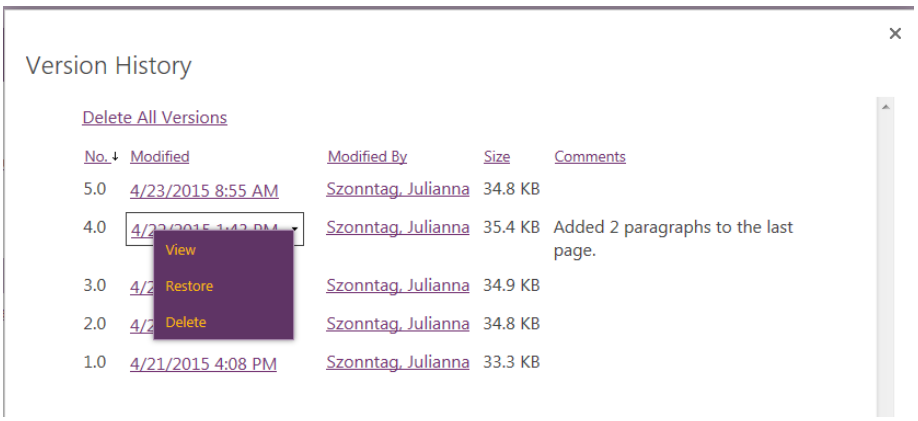


3. If necessary, check Keep The Document Checked Out After Checking In This Version. This option enables others to see your changes, but enables you to keep working in the file.
4. Click OK.

VIEW THE VERSION HISTORY OF A FILE

1. Navigate to the library that holds the file.

2. From the file's drop-down menu, choose Version History.

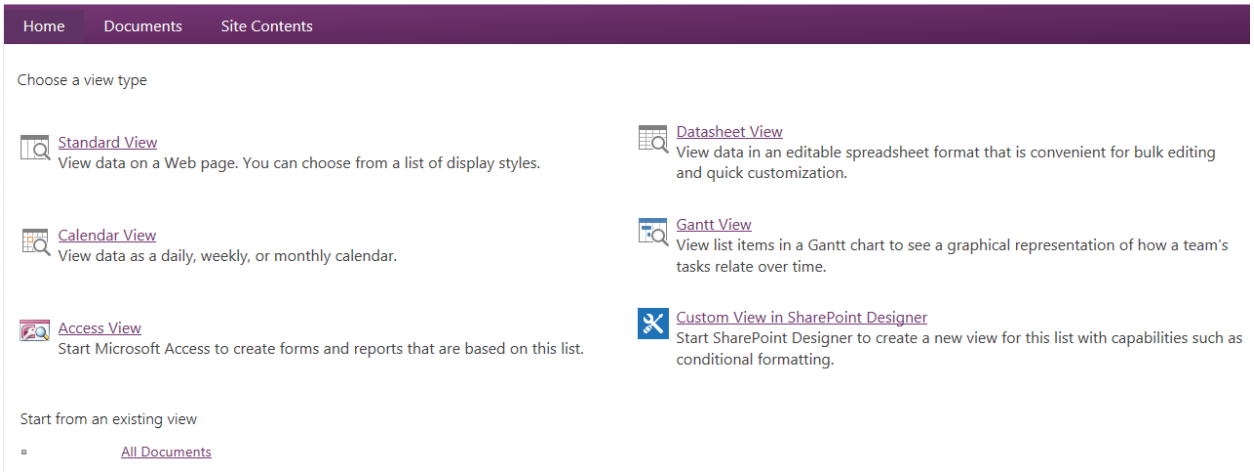


CREATE A CUSTOM VIEW

Views provide a flexible way to create custom display forms for users interactions with list data. Views provide the ability for you to control which fields are displayed, the order in which the fields appear in the list and advanced multicolumn sorts and multicolumn filtering. Two types of views that can be created are personal and public. Public views are displayed to all users who are viewing the list. Personal views are displayed only to the user who created them and allow users to create views that are specific to their needs. A personal view can be created from a public view, but a public view cannot be created from a personal view.

CREATE A VIEW

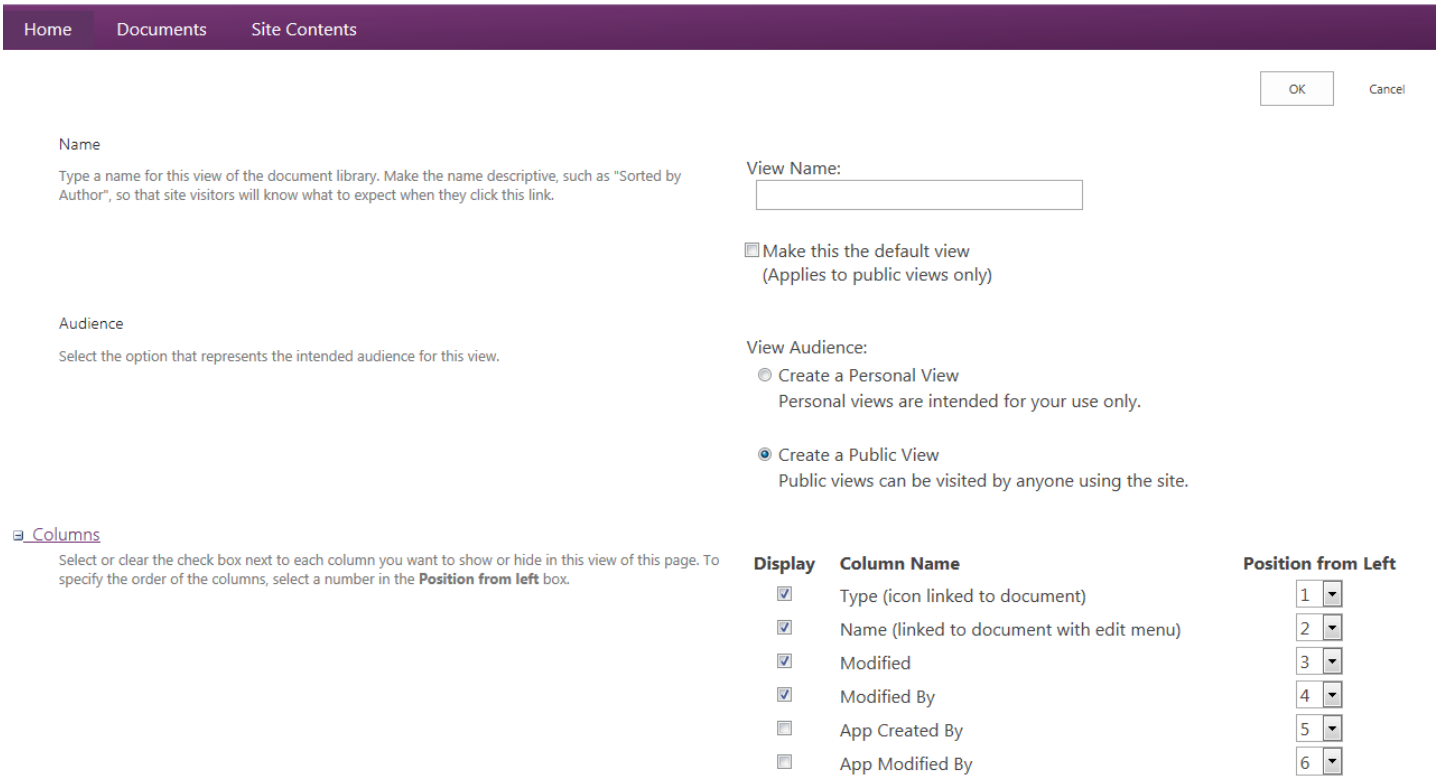
1. Open the list or library you want to create a view for.
2. Click on the List or Library tab on the Quick Launch bar and select Create View.
3. Click Standard View.



4. Enter a view name, the name must be unique to the list.

5. In the Audience section, select one of the available options:
    - Create A Personal View creates a view that is only displayed for you.
    - Create A Public View creates a view that other users can select and use. **Note:** only Owners of a site can create public views. If you are not an owner the create a view page will look slightly different.

6. In the Columns section you can do the following:
    - Click the check box under the Display column to show or hide a column in the view.
    - Change the order in which columns are displayed in the view by selecting a postion value from the drop-down list under Position From Left.



☐	Check In Comment	7
☐	Checked Out To	8
☐	Content Type	9
☐	Copy Source	10
☐	Created	11
☐	Created By	12
☐	Document ID (linked to document)	13
☐	Edit (link to edit item)	14
☐	File Size	15
☐	Folder Child Count	16
☐	ID	17
☐	Item Child Count	18
☐	Name (for use in forms)	19
☐	Name (linked to document)	20
☐	Title	21
☐	Version	22

Sort

Select up to two columns to determine the order in which the items in the view are displayed.
Learn about sorting items.

First sort by the column:

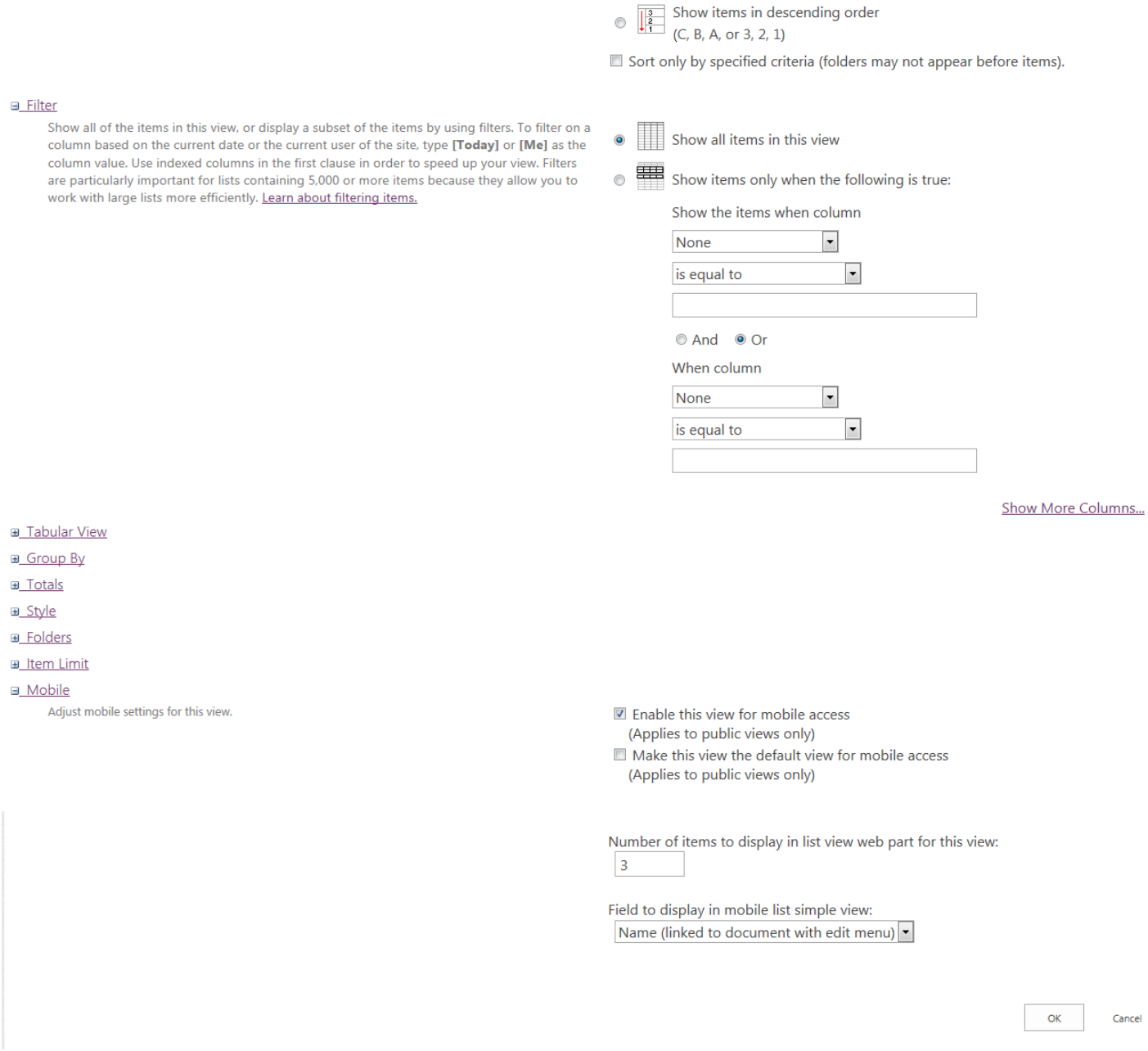
None

- ◉ Show items in ascending order (A, B, C, or 1, 2, 3)
- ○ Show items in descending order (C, B, A, or 3, 2, 1)

Then sort by the column:

None

- ◉ Show items in ascending order (A, B, C, or 1, 2, 3)

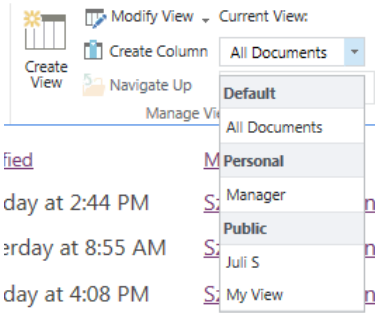


7. There are several other options that you can use to customize your view. Click on the + signs to explore these options.

8. Click Ok when you are finished creating your view.

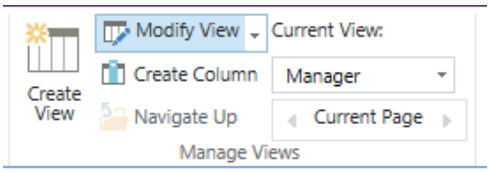
9. After you create a view, you are taken back to the list and your newly created view will be in effect for the list.

10. To return to the public view click on the view drop down menu and select All Documents.

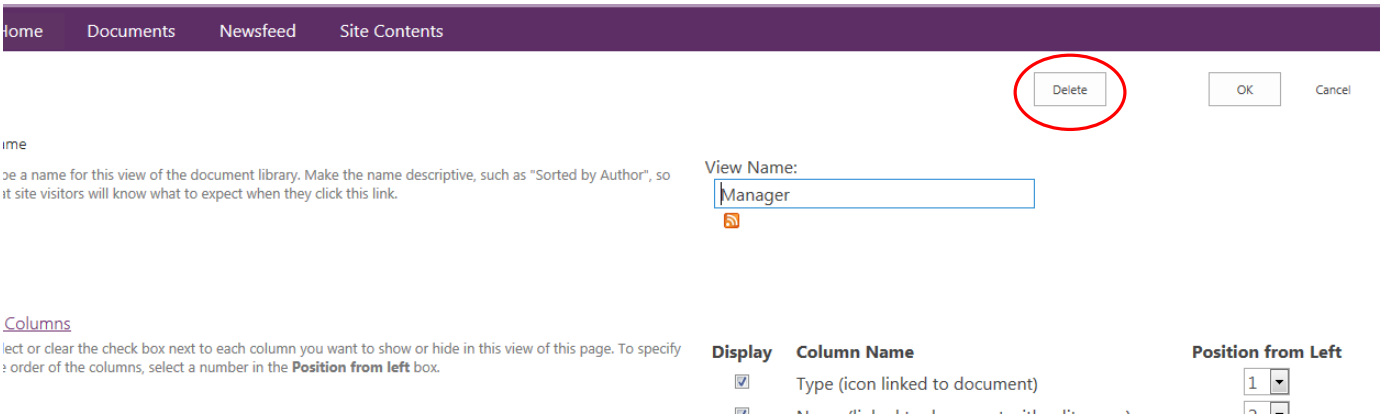


DELETE A VIEW

1. To delete a view in a list or library open the list or library and click on List or Library on the Quick Launch bar and select List or Library Settings.
2. Under the Views section click on the view you wish to delete.
3. The Edit View page opens. Scroll down to the bottom of the page and click Delete.
4. You can also delete the view by clicking on Modify this view.



5. The Edit View page opens. Click Delete at the top of the page.

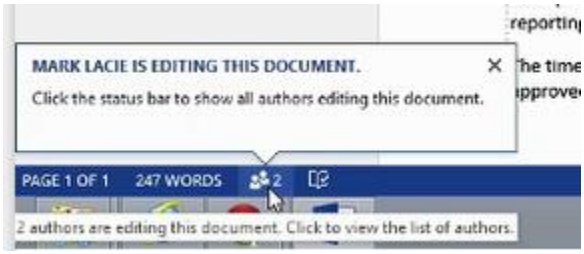


OFFICE 2013 FEATURES WITH SHAREPOINT 2013

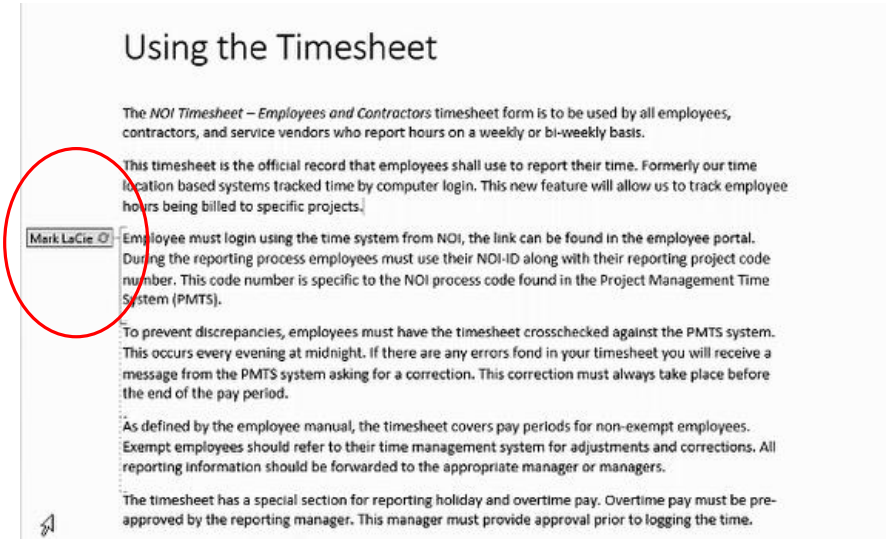
- If you have office 2013 installed on your computer Word pins the most recent SharePoint library locations to the Recent Folders list located on the Open page located in the Backstage view.
- To view the SharePoint Recent Folders
    - Open any document in the library
    - Click on File
    - Click on Open
    - Select SharePoint
    - Current folder shows the location of the library you are currently working in
    - Recent Folders shows the most recent libraries visited.
- If you opened a document in a library you can check out the document from the Manage Versions tab located on the Info page.
    - Open any document in the library
    - Click on File
    - Click on Open
    - Select Info
    - Click on the Manage versions icon and select Check Out.

Allows co-authoring in Word and Excel 2013

- This can only work if you don't check-out the document. If the document is checked out you can only have one person editing it at a time.
- The way it works is that it locks paragraphs or small sections of the document so you can't accidently overwrite the other person's changes.
- When someone else begins to edit the document you receive a notification in the taskbar. The notification gives you the name of the person who is editing.



- A grey bracket appears around the section the person is currently working on.



- You can see who else is editing the document and send emails to them by opening the Info page in Word.

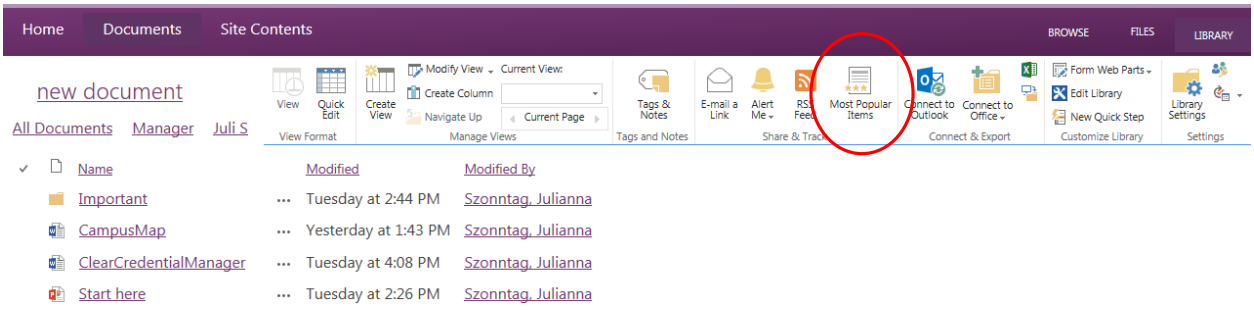
MOST POPULAR ITEMS

One of the new reporting features in SharePoint 2013 is the **Most Popular Items** function. This all-new **Analytics Processing Component** allows you to generate usage reports for items in SharePoint lists and/or libraries.

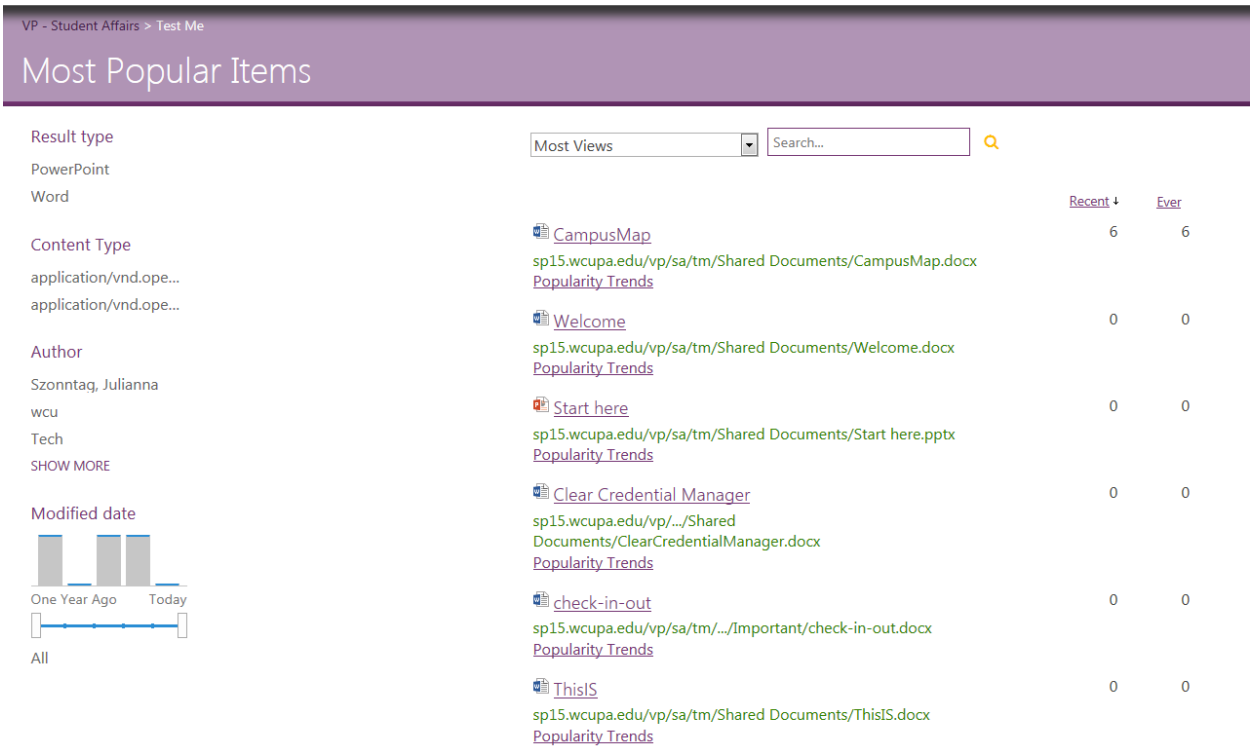
USING THE MOST POPULAR ITEMS FEATURE:

1. Navigate to the Document Library.

2. In the Quick Launch bar click the Library Tab and select **Most Popular Items**:

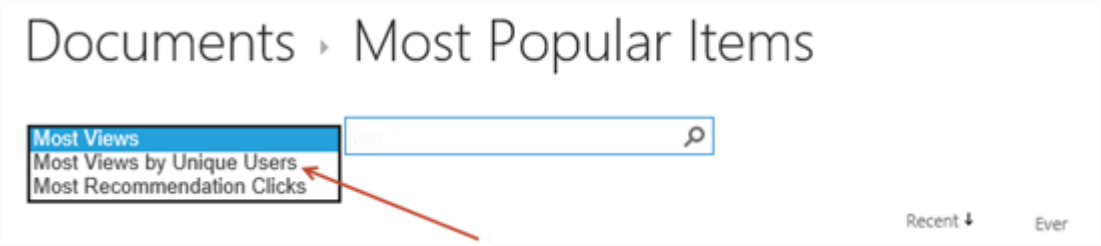


3. After clicking **Most Popular Items**, you will be taken to the following screen:



4. From here, you will be given the option of choosing three different types of search results for your report:

- **Most Views**
- **Most Views by Unique Users**
- **Most Recommendation Clicks** (based on usage patterns)

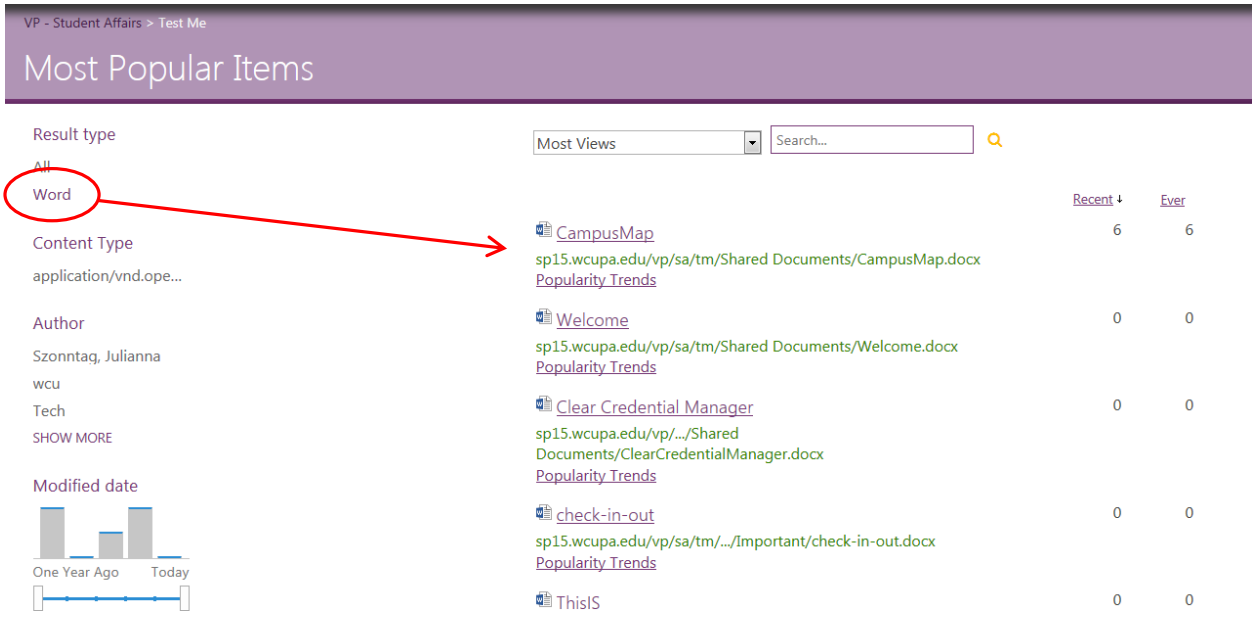


In this example, we will be searching for results based on **Most Views**.

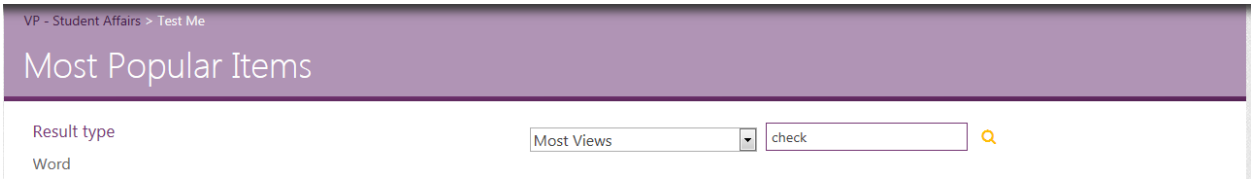
5. On the **Most Popular Items** report page, you will notice on the left that you have the option of narrowing down your results based on a number of different criteria. The criteria are:

- **Result type**
- **Content Type**
- **Author**
- **Modified date**

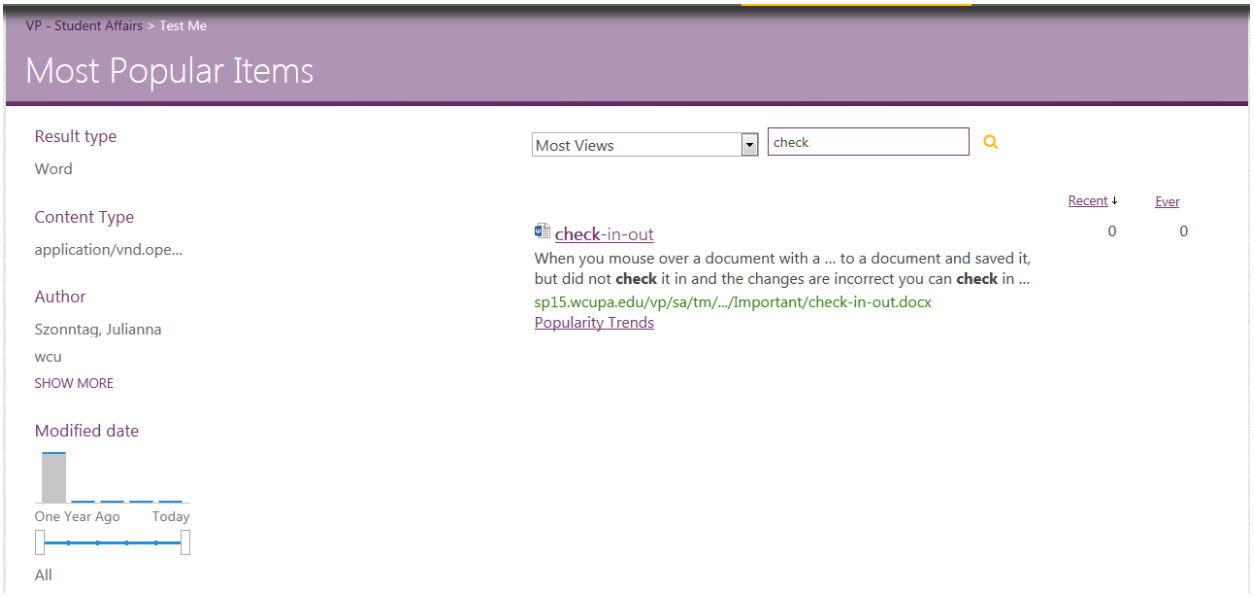
Click the different criteria that apply to the reporting statistics you wish to generate. In this example, we'll be creating a **Most Popular Items** report of **Word** documents based on **Most Views**.



6. In addition to the criteria listed on the left side of the page, you can also narrow down your results based on a specific term and/or value. Simply type the text which you wish to search in the box that is to the right of the drop-down menu where **Most Views** is listed. In this example, we'll be creating a **Most Popular Items** report of documents containing "**check**" based on **Most Views**.



After you have entered your desired text, simply click the **Search** icon and your results will be displayed:



Notes: