# Table of Contents

## The Fundamentals

- Introduction to SharePoint ................................................................. 6
- Accessing a SharePoint Site ................................................................. 7
- What's new in SharePoint 2013 ............................................................... 8
- Understanding the SharePoint Program Screen ...................................... 9
- Navigating in SharePoint ........................................................................ 10
- The Global Navigation Bar ...................................................................... 11
- Understanding the Ribbon ....................................................................... 13
- Understanding Permissions and Groups .................................................. 15
- Using Views and Sorting .......................................................................... 17
- Using Search ........................................................................................... 18
- Using Help ............................................................................................... 19
- Working with the Recycle Bin ................................................................. 20
- Working with Alerts ................................................................................ 21

## The Fundamentals Review .................................................................. 24

## Managing Lists

- Creating a List .......................................................................................... 26
- Working with List Items ........................................................................... 27
- Customizing a List .................................................................................... 29
- Deleting a List Item or a List ..................................................................... 31

## Managing Lists Review ....................................................................... 34

## Working with Lists

- Adding an Announcement ......................................................................... 36
- Adding a Contact ..................................................................................... 37
- Adding Links ............................................................................................ 38
- Viewing the Calendar ............................................................................... 39
- Adding an Event to the Calendar .............................................................. 40
- Adding a Recurring Event ........................................................................ 42
- Viewing a Tasks List ................................................................................ 43
- Updating a Task ....................................................................................... 44
- Adding Tasks, Subtasks and Milestones .................................................... 45
- Adding a Discussion Topic ....................................................................... 46
- Replying to a Discussion Topic ............................................................... 49
- Working with Issues ................................................................................ 51

## Working with Lists Review .................................................................. 54

## Working with Libraries

- Creating a Library .................................................................................... 56
- Creating a New Document in a Library .................................................... 57
- Uploading a File or Document to a Library ............................................ 60
- Opening and Editing a Document ............................................................ 61
- Checking Out and Checking In a Document ............................................ 63
- Enabling Versions History ....................................................................... 64
- Using Versioning History ....................................................................... 66
- Uploading Pictures .................................................................................. 67
- Managing Pictures ................................................................................... 69

## Working with Libraries Review ......................................................... 72

## Working with Blogs and Wikis

- Creating a Wiki Site ................................................................................ 74
- Working with a Wiki ................................................................................. 75
- Creating a Blog ......................................................................................... 77

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University of Salford
Introducing CustomGuide Courseware

Thank you for choosing CustomGuide courseware as the solution to your training needs. A proven leader in the computer training industry, CustomGuide has been the key to successful training for thousands of students and instructors across the globe.

This manual is designed for computer users of all experience levels. Novice users can use it to learn skills such as formatting text, while advanced users can use it to create their own templates.

All this information is quickly accessible. Lessons are broken down into basic step-by-step instructions that answer “how-to” questions in minutes. You can print a complete 300-page training manual or a single page of instructions.

Here’s how a CustomGuide manual is organized:

Chapters
Each manual is divided into several chapters. Aren’t sure if you’re ready for a chapter? Look at the table of contents that appears at the beginning of each chapter. It will tell you the name of each lesson and subtopic included in the chapter.

Lessons
Each chapter contains lessons on related topics. Each lesson explains a new skill or topic and contains an exercise and exercise file to give you hands-on experience. These skills can also be practiced using CustomGuide Online Learning.

Review
A review is included at the end of the manual. Use these quiz questions and answers to assess how much you’ve learned.

What People Are Saying

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Golden Triangle PC Club

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— Shannon Coleman
Learning Post Ltd.
Welcome to the first chapter of Microsoft SharePoint Foundation 2013! SharePoint is a tool that makes it easier for people to share important information and collaborate on tasks, documents, and projects.

This chapter will cover the basic information you need to begin working with SharePoint, such as how it is supposed to be used and how to access it. If you are familiar with using the Internet you are well on your way to being an effective SharePoint user.

**Note:** This training manual is intended for end-users of SharePoint, the people who will use SharePoint every day. We will not discuss how to configure or set up SharePoint. Some later chapters discuss basic customization that a power user may take advantage of, but the lessons are intended for end users.
**Introduction to SharePoint**

SharePoint is a Web-based program that acts as a hub for sharing and storing information, and collaborating within an organization. This centralized platform gives everyone access to the same information, makes collaborative tasks easier, and helps you manage deadlines and projects. When it is used to its potential, people will find that SharePoint makes it much easier to collaborate and communicate with others. It’s important to note that some SharePoint features may not be enabled in browsers other than Internet Explorer.

The first table, **Table 1-1: Common Uses for SharePoint**, lists a few of the ways SharePoint helps you work with others in your organization.

The second table, **Table 1-2: Things You Will Use in SharePoint**, describes the features that you will likely use most often.

| Store and collaborate on Documents Centrally | Documents and files are easy to find and organize when SharePoint’s libraries are used. SharePoint can also make documents available outside of an organization's network. |
| Share Information | It is much easier for users to find and share information when it is stored in a central location. No going back through e-mail messages or other forms of communication to find out something. Places for announcements and shared calendars facilitate communication, as do tools such as blogs and wikis. |

| Lists | Lists are used to organize and store many different things in a SharePoint site and are almost always displayed in the Quick Launch bar. All of these items are stored in lists: announcements, contacts, links, calendar, tasks, project tasks, and issue tracking. |
| Libraries | Libraries are used to store and share files and they provide features specifically for the types of files stored in the library. For example, the picture library provides image-specific features like a slide show and thumbnails. All of these are types of libraries: Document, Form, Picture, and Wiki Page. |
| Discussion Boards | A place for newsgroup-style discussions. Post topics and follow the discussion thread through replies to the post and other replies. |
| Sites | Sites may be added as subsites to the current site. The sites are added using a template, so they are easy to put into working order. There are three sets of sites: Collaboration, Content, and Meetings. |

**Exercise**

- **Exercise File:** None required.
- **Exercise:** Identify how SharePoint can be a useful and effective tool in your organization.

**Figure 1-1:** A SharePoint site.

---

**The Fundamentals**

- The lessons in this course are written for SharePoint Foundation 2013. However, many of the lessons can also be applied to SharePoint Server 2013.
Accessing a SharePoint Site

SharePoint Foundation is a Web-based service that uses sites to facilitate communication and collaboration. You are given permission to access the sites that are relevant to you. For example, you might have access to sites created for your organization and your department or team, but not to sites that belong to another department or team.

Before you can begin using SharePoint, an administrator or site owner must give you access to the site. You should receive an e-mail with the site’s URL and other information necessary to access the site.

1. Open your Web browser and open the link you have been given for the SharePoint site.
   When you go to the link, you will be prompted for your user name and password.

2. Enter your user name and password and press <Enter>.
   The Home page of the SharePoint site appears.
   The site that appears depends on the link you have been given. SharePoint is a collection of sites, so you may have been given a link to the Home site or a link to a team site, such as a site for your department.

Exercise

- Exercise File: None required.
- Exercise: Open the SharePoint site link you have been given and enter your user name and password information to access the site.
What’s new in SharePoint 2013

In this lesson we’ll have a look at some of the new features in SharePoint 2013.

Table 1-3: What’s New in SharePoint 2013?

<table>
<thead>
<tr>
<th>New Look</th>
<th>The general layout has stayed similar, but the new and improved look goes a long way to making SharePoint a cleaner, better looking product.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office/Social Integration</td>
<td>If your company uses Exchange, or you have an organizational account, you will now be able to access your OneDrive (previously known as SkyDrive), Outlook People (Contacts) and Calendar from SharePoint using the hub links located to the left of the User menu.</td>
</tr>
<tr>
<td>Increased Video/Media Support</td>
<td>HTML 5 and Silverlight players are now supported on SharePoint 2013.</td>
</tr>
<tr>
<td>Improved Office 2013 Integration</td>
<td>Office 2013 products have been designed to integrate well with SharePoint 2013. For instance, if you have Project 2013, you can export files to a SharePoint list and sync the list so that any changes are updated and when using Exchange, you have even more options. Set up a project mailbox on SharePoint to centralize project communication and capture things like issues, risks and deliverables. Other Office 2013 products have similar modifications which enable you to use them alongside SharePoint seamlessly.</td>
</tr>
<tr>
<td>Expanded Task Tracking</td>
<td>If your company uses Exchange, you will be able to view and filter all your tasks centrally, including those assigned to you in SharePoint, as well as tasks you have created in other applications like Outlook.</td>
</tr>
<tr>
<td>On Page Editing</td>
<td>Create and edit Lists on the same page, just as you would if you were working in Word or Excel.</td>
</tr>
<tr>
<td>Design Manager</td>
<td>You can design a SharePoint site from scratch or change master pages and layouts, by using the new Design Manager. This gives you even more control over the look and feel of your SharePoint site.</td>
</tr>
<tr>
<td>App Store</td>
<td>Apps are standalone programs that solve or perform specific functions. SharePoint 2013 includes the ability to develop, install, manage and use new apps. You also have access to more apps from the SharePoint Store.</td>
</tr>
<tr>
<td>Improved overall performance</td>
<td>Business connectivity has been improved so data retrieval, filtering and other actions performed with external data sources are faster.</td>
</tr>
</tbody>
</table>

Exercise
- **Exercise File**: None required.
- **Exercise**: Discuss some of the new features available.
Understanding the SharePoint Program Screen

The SharePoint Foundation 2013 program screen may seem confusing and overwhelming at first. This lesson will help you become familiar with the SharePoint 2013 program screen as well as the new user interface.

### Exercise

- **Exercise File:** None required.
- **Exercise:** Understand and experiment with the different parts of the SharePoint site.

---

![Diagram of SharePoint page elements](image)

**Figure 1-3:** This diagram displays the Home page of a team site. Using team sites is the most common way to work with SharePoint.

<table>
<thead>
<tr>
<th></th>
<th><strong>Page button:</strong> Click here to view the current page in Edit mode.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Ribbon:</strong> The tabs on the Ribbon give you access to the commands and settings for any page in SharePoint. The tabs and buttons on the Ribbon and the Ribbon's availability depend on the permission level assigned to the account.</td>
</tr>
<tr>
<td></td>
<td><strong>Breadcrumb navigation:</strong> Displays the navigation path of the current page. Click a link earlier in the path to open the page.</td>
</tr>
<tr>
<td></td>
<td><strong>Top link bar:</strong> Click a link on the top link bar to view a subsite.</td>
</tr>
<tr>
<td></td>
<td><strong>Search box:</strong> Enter a search term here to perform the search in the site collection.</td>
</tr>
<tr>
<td></td>
<td><strong>User menu:</strong> Click here to view options that manage your account, such as editing the user profile and signing out.</td>
</tr>
<tr>
<td></td>
<td><strong>Settings button:</strong> Includes commands to work with items, lists, and objects on the site. The options in the list and the list's availability depend on the permissions level assigned to the account.</td>
</tr>
<tr>
<td></td>
<td><strong>Help button:</strong> Click the Help button to search SharePoint Foundation's Help files.</td>
</tr>
<tr>
<td></td>
<td><strong>Title link:</strong> Click this button to navigate back to the Home page from any SharePoint subsite.</td>
</tr>
<tr>
<td></td>
<td><strong>Quick Launch bar:</strong> Navigate between items in the site through the Quick Launch bar.</td>
</tr>
<tr>
<td></td>
<td><strong>Web Part:</strong> View and work with items on the page through customizable Web Parts.</td>
</tr>
<tr>
<td></td>
<td><strong>Global Navigation Bar:</strong> Access the Outlook Web App, your Newsfeed, organizational OneDrive, and other SharePoint Sites you use or follow.</td>
</tr>
</tbody>
</table>
Navigating in SharePoint

Navigating in SharePoint is a lot like browsing pages on the Web. This lesson will introduce the tools used to navigate within a SharePoint site.

Quick Launch

The Quick Launch appears along the left side of the page. It organizes links to pages of the site.

The Quick Launch can be customized by users with the proper permission rights. For example, the site owner can choose if they want to include a new site in the Quick Launch of the parent site (the site under which the new site is created). Because the Quick Launch is customizable, all lists and libraries for the site do not always appear in the Quick Launch.

Top link bar

The top link bar appears across the top of pages on a site. Each tab in the top link bar represents another site, such as a blog or a workspace. The items and sites that appear in the top link bar depend on how the subsite is set up when it is created.

Tips

✓ Note that Office 365 users will have additional links (such as links to Outlook mail and their Outlook Calendar and People) displayed above the Ribbon on SharePoint.

Title link

This link was previously known as the Navigate Up button in SharePoint 2010, and it supplements breadcrumb navigation by allowing you to navigate back up to the main Home page of a SharePoint site. You can even navigate back from a SharePoint subsite.

Tips

✓ The Title link is available no matter what tab of the Ribbon is active.

Breadcrumb navigation

As its name implies, this navigation tool displays the path you’ve taken to the current page. Each “breadcrumb” is a site or page that sits above the current page in the site hierarchy. The breadcrumbs lead you back to the Home page from the page you are on. For example, if you are in the Tasks list, you can navigate back to the Home page using breadcrumb navigation.
The Fundamentals

Site Contents
This link appears below the Quick Launch bar. Click this link to open the Site Contents page where you can see all of the site’s lists, libraries, discussion boards, sites and surveys. This is the most reliable way to view all of the site’s content.

Tree View
This view displays the hierarchy of the site, similar to the tree view in Windows Explorer. This view is not displayed by default. If a site owner has enabled this view, it will appear in the Quick Launch bar, right below the Site Contents link.

Figure 1-6: Tree view displays directly below the Quick Launch
The Global Navigation Bar

Besides the standard navigation tools provided for SharePoint 2013, you will also see some links available on the Global Navigation bar.

These provide quick entry points to your Newsfeed, Organizational OneDrive and other SharePoint sites you follow or frequently use.

Newsfeed

Welcome to your blog! Newsfeed is your entry point to organizational social networking. Anyone who can see your post can reply to it and when choosing to follow someone’s Newsfeed, you will also be able to see their posts under the Following view.

Trap: If your organization is setup to use Yammer, as its social networking tool, you may see a link here for Yammer, instead of Newsfeed.

1. Click the Newsfeed link on the Global Navigation bar.

   - Start a conversation in the space provided, and click the Share with drop down above, to select who you want to share your post with.
   - Use the Newsfeed Search bar, to search the Site, Conversations and People for keywords, names or phrases.
   - Under I’m following, you can see a numeric summary of documents, people and sites you are currently following, as well as the number of tags you have applied to content you want to collect or share with others.
   - Access your personal Blog, edit your Profile, or add Tasks and Apps from the Quick Launch menu on the left.

OneDrive

Previously known as SkyDrive, OneDrive is your online storage space for documents and files.

It’s important to note that there are two different types of OneDrive available:

   - The organizational OneDrive, referred to as OneDrive for Business.
   - Your personal OneDrive, referred to simply as OneDrive.

OneDrive for Business: is hosted on SharePoint as a Document Library. When you use this OneDrive, you can create, store and access documents and files that can also be made available to others in your organization.
The Fundamentals

1. Access this OneDrive by clicking **OneDrive**, on your SharePoint Navigation bar.
   - Open **Recent Documents**, or **Followed Documents**, from the Quick Launch menu on the left.
   - Create a new document, or upload an existing one from here, as you would from within your SharePoint Team Site.
     
     **Tip:** To make documents and files available to others, save or upload them to the **Shared with Everyone** folder.

     **Trap:** After placing or creating documents in the Shared with Everyone folder, it can take a while before the document becomes available to others.
   - You can also use the **Search** bar to locate shared documents from Conversations, People or Sites.

**OneDrive**: comes free with Microsoft Outlook or a Microsoft Account. The documents and files you create and save here, are only available to you, and those you specifically share them with.

1. Using your Microsoft Account credentials to sign in, you can access this account directly via: [https://onedrive.live.com/](https://onedrive.live.com/) or, click the **Open**. **Save As** or **Share** options on the applicable **File** tab of the Office application you’re working in.

**Sites**

Your Sites page, gives you centralized access, to your Team Site, your Blog, your organization’s Public Site, as well as links to any other Sites you are following.

1. Access this page, by clicking **Sites** on your SharePoint Navigation bar.
   
   **Another way to access Sites:** Log on to your Microsoft Office 365 Account, and click **Sites** on the Navigation bar.

2. Click the appropriate link to be re-directed to a particular site.

   **Tip:** Refer to the lesson, further down in this guide on Office 365 Integration, to see more about the remaining links available on the Global Navigation bar.

![Figure 1-9: OneDrive (Personal)](image1)

![Figure 1-10: SharePoint Sites page](image2)
Understanding the Ribbon

Microsoft introduced the Ribbon in Office 2007; it's now included in SharePoint from the 2010 version upwards. The Ribbon replaces menus and toolbars found in previous versions. The Ribbon keeps commands visible while you work instead of hiding them under menus or toolbars.

There are three elements to the Ribbon: tabs, groups, and buttons. Unlike other Microsoft Office programs, the tabs, groups, and buttons in SharePoint are contextual. They change depending on your permission level and the page you are viewing.

**Tabs**

Commands are organized into *tabs* on the Ribbon. Each tab contains a different set of commands. The tabs that appear on a page change, depending on the page being viewed. For example, when you are viewing a Picture Library, the Browse, Items and List tabs appear on the Ribbon. When you view a Wiki, the Browse and Page tabs appear on the Ribbon.

Each page with a Ribbon always has a Browse tab. Click the **Browse** tab to return to read-only mode and view breadcrumb navigation if it’s hidden.

**Groups**

The commands found on each tab are organized into *groups* of related commands. For example, the New Group contains commands used for adding items or files to a page. Groups are also contextual, so the commands that appear in the New Group for a Document Library are different than the commands that appear in the New Group for a list.

**Tips**

- Based on the size of the browser window, SharePoint changes the appearance and layout of the commands within the groups.

**Exercise**

- **Exercise File:** None required.
- **Exercise:** Click each tab on the Ribbon to view its commands.

![Figure 1-11: Ribbon elements.](image)
Buttons

One way to issue a command is by clicking its button on the Ribbon. Buttons are the smallest element of the Ribbon and change color when clicked. Both the page type and your permission level determine what buttons you see on the Ribbon. There are two reasons buttons appear greyed out on the Ribbon:

- You do not have permission to access that particular SharePoint command.
- You have not selected an item in the list.

Tips

✓ If your organization is upgrading from a previous version of SharePoint, your system administrator may opt to turn off the Ribbon functionality.

Figure 1-12: Permission levels determine buttons that appear on the Ribbon
Understanding Permissions and Groups

Anyone who has access to a SharePoint site is assigned a permission level and/or group. The permission level limits the amount of control the user has in the site, and these permission levels are assigned to groups.

Understand that you may have different permissions in different sites, depending on how the site has been set up by the site owner. For example, you might have Contribute permissions in your team site, but only Read permissions in another department’s site.

The table below lists the permissions available by default in SharePoint and explains the amount of control that users have with each permission level.

<table>
<thead>
<tr>
<th>Permission Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Control</td>
<td>All permissions are included. Users with this permission level have complete control over everything in the site. Site Owners are given this permission level by default.</td>
</tr>
<tr>
<td>Design</td>
<td>Create many things, including lists and document libraries. Also edit pages and change the appearance of the site by applying themes or style sheets.</td>
</tr>
<tr>
<td>Contribute</td>
<td>Add, edit, and delete items in existing lists and document libraries. Site Members are given this permission level by default.</td>
</tr>
<tr>
<td>Read</td>
<td>Read-only access to the Web site. View items and pages, open items and documents. Site Visitors are given this permission level by default.</td>
</tr>
<tr>
<td>Edit</td>
<td>View Lists and Pages and download documents.</td>
</tr>
<tr>
<td>Limited Access</td>
<td>This is a special permission level that gives users access to a specific list, item, or document, without giving them access to the entire site.</td>
</tr>
</tbody>
</table>

Tips

- Permission levels can be customized by site owners and administrators (Exception: Full Control and Limited Access levels cannot be changed).
Using Views and Sorting

You can change how items and files are displayed in lists and libraries by changing the view that is used. You can also sort the items by a column in a view.

Change a view

The views that are available depend on the type of items being displayed. For example, surveys have different views than document libraries.

1. Click the name of a list or library in the Quick Launch bar.
   The list or library appears in its default view.

2. Click the List or Library tab on the Ribbon.
   Commands specific to the list or library appear on the Ribbon.

3. Click the Current View list arrow in the Manage Views group and select the view you want to use.
   The list or library displays in the selected view.

Sort items

You can sort items in a view to find and analyze the information you want quickly.

1. Point at the name of the column by which you want to sort the view.
   The column is highlighted.

2. Click the column list arrow and select Ascending or Descending.
   The items are displayed using the selected view.

   - Other Ways to Sort Items:
     Click the name of a column to toggle, sorting by that column.

Exercise

- Exercise File: None required.
- Exercise: Open a list or library and change its view.
  Change how items are sorted using the columns in the view.
  Return the view and sorting to the original state.

Figure 1-14: Views in a Tasks list.

Figure 1-15: Sorting items in a tasks list.
Using Search

The Search feature is a powerful function of SharePoint Foundation 2013. Searches can be performed in one specific area or across an entire collection of sites.

Search in SharePoint

Start at the top site in SharePoint to search the entire site and its subsites.

1. Click in the Search box at the top of the page.
2. Type the search word or term and press <Enter>. The results of the search appear on the screen.

Exercise
• Exercise File: None required.
• Exercise: Become familiar with the Search features in SharePoint.

Figure 1-16: Search box

Figure 1-17: Search Results
Using Help

If you have a question about SharePoint, you can use the Help files to find an answer. You can search the Help files for information no matter what permission level you have been assigned; the same results will appear for all users.

Search for help

1. The Help button is always situated next to the User Menu and Settings button on the top right hand side of the Ribbon, so you can access it no matter where you are on the SharePoint site.

2. Click the Help button.
   The SharePoint Help window appears.

3. In the Search text box, type what you want to search for, and press <Enter>.
   A list of help topics related to your query appears.

4. Click the topic that best answers your question.
   Help displays information regarding the selected topic.

Browse for help

1. The Help button is always situated next to the User Menu and Settings button on the top right hand side of the Ribbon so you can access it no matter where you are on the SharePoint site.

2. Click the Help button.
   The SharePoint Help window appears.

3. Click the link for the category you want to browse.
   The topics within the selected category appear.

4. Click the topic that best matches what you’re looking for.
   Help displays information regarding the selected topic.

Tips

✓ When a standard search returns too many results, try searching using more specific search terms.

Exercise

- **Exercise File:** None required.
- **Exercise:** Browse the help topics under the Search category in the Help files.

Figure 1-18: The Home page of SharePoint Help.
Working with the Recycle Bin

Just like a wastebasket stores trash, the Recycle Bin stores all of the items you have deleted. You can delete files, lists, and objects, and they will be moved to the Recycle Bin for a set period of time before being permanently deleted.

**Tips**

- Site administrators can schedule how often a site's Recycle Bin should empty. Contact your SharePoint site administrator to confirm how often objects in the Recycle Bin are permanently deleted.

**Restore or Delete an object**

If you’ve deleted an item, list, or file and find that deleting that object was a mistake, you may be able to retrieve it from the Recycle Bin.

1. Click the **Site Contents** link on the Quick Launch Bar. Click the **Recycle Bin** link that is displayed to the right of the Screen.

   **Other Ways to Access Recycle Bin:**
   - Click the **Settings** button and then select **Site Settings**. In the Site Collection Administration section select **Recycle Bin**. (Note that only users with certain permissions can access the Recycle bin this way).

2. Click the check box next to each object that you want to restore or delete.

   You can select multiple items to apply an action to.

3. Click the **Restore** or **Delete Selection** link at the top of the list according to the action you want to perform.

   **Delete Selection:** A dialog box appears. Select **OK** to remove the item/s from the Recycle Bin. Deleted items cannot be recovered.

   **Restore Selection:** A dialog box appears. Click **OK** to restore the file. This will send the item to the location where it was saved before being sent to the Recycle Bin.

   **Tip:** When you delete a file, all versions of the file are also deleted. When you delete a library, all files in the library are deleted.

---

**Exercise**

- **Exercise File:** None required.
- **Exercise:** Open the Recycle Bin and understand how items can be restored from the Recycle Bin.

---

![Figure 1-19: Deleted items are stored in the Recycle Bin for a set period of time before they are permanently deleted.](image-url)
Working with Alerts

Alerts let you to track items and locations in SharePoint. Create an alert to receive a notice about changes to an object, list, library, folder, or file.

Receive alerts for an item or document

1. Open the list or library and point to the item about which you want to be notified.
   You can also receive alerts from wiki pages.

2. Click the item’s Open Menu (…) button and select Alert Me from the list.
   The New Alert dialog box appears where you can specify the settings of the alert.

   Other Ways to add an Alert:
   Select the Items tab on the Ribbon of the applicable page and then select Alert Me from the Share and Track group. You can also click the User menu, select My Settings and then click My Alerts.

   Trap: User permissions and the way the site has been set up, will dictate whether or not you are able to set alerts.

3. Enter the name of the alert in the Alert Title text box.
   This title will appear in the Subject of the e-mail notification.

4. If necessary, you can enter other user’s names or e-mail addresses in the Send Alerts To field.
   By default, the user logged in to the computer should appear in the text box. If you have the permission to manage alerts, you can add multiple users to an alert. Type the user name or e-mail address and separate each entry with a semicolon.

5. Select how you want alerts delivered in the Delivery Method section.
   E-mail is the default method to receive alerts. You can also choose to receive alerts via text message if your server administrator has enabled the SMS service.

6. Select the conditions that warrant a notification in the Send Alerts for These Changes section.
   There are several options to choose from. Each option sends an alert using different criteria.

Exercise

- **Exercise File:** None required.
- **Exercise:** Understand how to create and remove alerts for items, lists, and libraries.

Figure 1-20: Adding an alert to a list item.

Figure 1-21: Creating an alert on the New Alert page.
7. Select when you want an alert to be sent in the When to Send Alerts section.

There are three options to choose from, depending on how frequently you want to receive alerts:
- immediately after a change occurs,
- a daily summary,
- or once a week.

8. Click OK.

The alert is created.

**Receive alerts for a list or library**

These alerts allow you to get updates when any change is made in a list or library.

1. Open the list or library for which you want to receive alerts.

2. Click the List or Library tab on the Ribbon and click the Alert Me button list arrow in the Share & Track group.

   A list of options appears.

3. Select Set alert on this list or Set alert on this library.

   The New Alert dialog box appears. The options for the alert are similar to those for list items or library documents.

4. Enter the alert options and click OK.

   The alert is created.

**Remove an alert**

If you no longer need to keep track of an item, you can remove the alert you’ve attached to it.

1. Click the Settings button and select Site Settings from the list.

   The Site Settings page opens.

2. Click User Alerts under the Site Administration heading.

   You may need to select to display certain alerts by clicking the Display alerts for drop down and selecting the alert.

3. Click the check box next to the alert you no longer wish to receive. You can select more than one alert to delete several alerts at a time.

4. Click Delete Selected Alerts.

   The alert is deleted from the list.
The Fundamentals Review

Quiz Questions

1. What is SharePoint?
   A. A hub for sharing and storing information and working together within an organization.
   B. A program that lets you create forms to share with others in your organization.
   C. A hub for phone message services in an organization.
   D. An e-mail application.

2. You must be given permission to access a SharePoint site. (True or False?)

3. Which of these is NOT part of a SharePoint site screen?
   A. Quick Launch bar
   B. Navigation Pane
   C. Top link bar
   D. Breadcrumb navigation

4. The Site Contents link is the only way to view all the lists, libraries, and sites and in a site. (True or False?)

5. Which link would you select to directly post to your Blog:
   A. Sites
   B. Newsfeed
   C. OneDrive

6. The Ribbon appears with the same tabs, groups, and buttons on each page in SharePoint. (True or False?)

7. What is the difference between permission levels and groups?
   A. There is no difference; they are the same thing.
   B. Permission levels can be changed, while groups cannot be changed.
   C. There are more default groups than permission levels.
   D. Users are assigned to groups, and groups are granted a certain permission level by the site administrator.

8. Searches are confined to the contents of the current site. (True or False?)

9. Help automatically filters help inquiries according to a user’s permission level on a given site. (True or False?)

10. Objects in the Recycle Bin are never permanently deleted. (True or False?)

11. Which of these items is not available for alert notification?
    A. Documents and Items
    B. Recycle Bin
    C. Lists and Libraries
    D. Discussion Boards
Quiz Answers

1. A. SharePoint is a hub for sharing and storing information and working together within an organization.

2. True. In order to access a SharePoint site you must be given permission by the individual(s) managing the site.

3. B. There is no Navigation Pane in SharePoint.

4. True. The Site Contents link displays everything in the site.

5. B. Newsfeed. You can access your Blog from your Sites page, but Newsfeed is the most direct way to access your Blog.

6. False. The Ribbon is contextual, so the tabs, groups, and buttons that appear depend on the page being viewed.

7. D. Users are assigned to groups, and groups are granted a certain permission level by the site administrator.

8. True. Previous versions of SharePoint did have a Search Scope control which allows users specify search locations, SharePoint 2013 search function however does not have this function.

9. False. Help topics include topics for site administrators and site visitors. Search results are not filtered to meet the specific needs of a user.

10. D. False. Objects are stored in for a set period of time. After that they are permanently deleted.

11. B. You cannot receive an alert for changes made to the Recycle Bin.
Managing Lists

Creating a List ......................................................... 27

Working with List Items ........................................... 29
   Add a list item .................................................. 29
   Edit a list item .................................................. 29

Customizing a List .................................................. 31
   Create a list view .............................................. 31
   Add a list column .............................................. 31

Deleting a List Item or a List ................................. 33
   Delete a list item .............................................. 33
   Delete a list .................................................... 33

Lists facilitate a large part of the content on a SharePoint site. They are used to store and organize communication and collaboration information, such as calendars and events, tasks, announcements, and contacts.

This chapter provides a general overview of how to manage lists: how to create and customize lists and work with the items stored in lists.
Creating a List

Lists are used to organize, store, and work with items that are concerned more with the communication and tracking aspect of a SharePoint site.

Some of the more specific types of items include links, announcements, contacts, events, and tasks.

Tips

✔ You can only create lists if you have the correct site permissions.

1. Open the site where you want to create the list.

2. Click the Settings button and select Site Contents from the list.

   A window appears, displaying all the different objects you can add to the site.

   Other Ways to Create a List:
   Click the Site Contents link on the Quick Launch bar.

3. Select Add App from the available options.

   In the Find an App field, type in list and press <Enter>.

   All list types appear. The table on the following page, Table 2-1: Default List Types in SharePoint, describes the types of lists you can create.

   Information about each list can be found by clicking on the App Details link below the option.

4. Select the type of list you want to create.

5. Enter a name for the list.

   The name will appear in the Quick Launch bar of the site. You can change additional options if necessary.

   Select Create. The list is created and appears on the Site Contents screen.

6. (Optional) On the Site Contents page, click the More Information (…) button of the newly created List and then select Settings.

7. A Settings page will open will all the options available for changing the List. (Optional) Click the List name, description and navigation link to change the name, enter a description of the list or

Exercise

• Exercise File: None required.
• Exercise: Create a new Contacts list called “Event Photographers”. We will use this list to keep track of all the contact details of photographers used at events.

Figure 2-1: Selecting the Contacts List from the Add App page

Figure 2-2: The Create dialog box.
Managing Lists

choose if you want to display the list in the Quick Launch bar.

There are two options here:

- **Yes:** The list will be displayed in the Quick Launch bar. This is selected by default.

- **No:** The list will not be displayed in the Quick Launch bar, and users will have to find the list through alternate navigation methods. Only use this for lists that you don’t want to make known to others, or that won’t be used very often.

When the list settings are ready, select **Save** and you’ll be returned to the List Settings page.

<table>
<thead>
<tr>
<th>Table 2-1: Default List Types in SharePoint</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Blank and Custom</strong></td>
</tr>
<tr>
<td>Custom List: Create your own type of list by specifying the types of columns included.</td>
</tr>
<tr>
<td>Custom List in Datasheet View: Presents the list in datasheet format. Specify the types of columns included and use the list with Excel.</td>
</tr>
<tr>
<td>Import Spreadsheet: Import a spreadsheet you want to use as a list in SharePoint. The list will have the same columns and content as the spreadsheet.</td>
</tr>
<tr>
<td><strong>Communication</strong></td>
</tr>
<tr>
<td>Announcements: Stores announcements that are added to share small bits of information. By default, an announcements list is created in every team site. This list appears on every Home page.</td>
</tr>
<tr>
<td>Contacts: Stores information about contacts with whom your team regularly works. Also share contacts with compatible programs, such as Outlook. (Also found under Tracking)</td>
</tr>
<tr>
<td>Discussion Board: Bring your discussions online with this newsgroup-style format. Includes features for managing discussions and approving posts.</td>
</tr>
<tr>
<td>Links: Create a list for resources and information you want to share with team members. (Also found under Content)</td>
</tr>
<tr>
<td><strong>Content</strong></td>
</tr>
<tr>
<td>Links: Create a list for resources and information you want to share with team members. (Also found under Communication)</td>
</tr>
<tr>
<td><strong>Data</strong></td>
</tr>
<tr>
<td>External List: Create a list using an external content type and connect with other software and network resources.</td>
</tr>
<tr>
<td>Survey: Gather information from other people by asking them to fill out a survey. Includes tools to tally results, and create survey questions and answers.</td>
</tr>
<tr>
<td><strong>Tracking</strong></td>
</tr>
<tr>
<td>Calendar: Share plans and events, such as meetings and deadlines with team members in a single location. Events can also be shared with Outlook calendars.</td>
</tr>
<tr>
<td>Contacts: Stores information about contacts that your team regularly works with. Also share contacts with compatible programs, such as Outlook. (Also found under Tracking)</td>
</tr>
<tr>
<td>Issue Tracking: Use this type of list to track a set of related issues and problems. Includes tools to manage issues until they are resolved.</td>
</tr>
<tr>
<td>Tasks: Track a list of to-do chores that the team needs to work on together. Includes features for updating and tracking the status of the tasks.</td>
</tr>
</tbody>
</table>
Working with List Items

Lists are great tools for tracking tasks and communicating information. Lists are also very easy to edit.

Add a list item

The information required for an item changes depending on the type of list in which the item will be created.

Tips

✓ You can only create items if you have the correct permissions to do so in the site.

1. Open the list in which you want to add an item.
   The list opens in Standard view.

2. Click the **New Item** link at the top of the list.
   The New Item dialog box appears.

**Tip:** Many of the types of items you can create in a list are covered in more detail in the “Working with Lists” chapter.

3. Enter information about the item, depending on what list you’ve selected.
   You can fill in as much or as little information as you want, as long as the required fields are completed.

4. Click the **Save** button.
   The item is displayed in the list. An icon will also appear next to the item, indicating that the item is new.

**Tip:** You can add multiple items to a list using the Datasheet view format. To open Datasheet view, click the **List** tab on the Ribbon and click the **Quick Edit** button in the View Format group. Enter new items as rows and fill in information as you would in a spreadsheet.

Edit a list item

Once an item is created, it can easily be edited to change or add information.

1. Open the list in which the list item that you want to edit is stored.
   The list opens in Standard view.

2. Select the item that you want to edit and click the **Items** tab on the Ribbon.

---

Exercise

- **Exercise File:** Event Photographers list
- **Exercise:** Add a new item for Katie Smythe. Edit the item setting the Email address to bookings@katriesmythe.com

![Figure 2-3: Creating a new contact list.](image)
Managing Lists

3. Click the **Edit Item** button in the Manage group.
   An item dialog box appears. You'll notice that the dialog box is very similar to the New Item dialog box.

   **Other Ways to Edit a List Item:**
   Point to the list item that you want to edit. Click the item’s **Open Menu (...)** button and then select **Edit Item** from the list.

4. Edit information for the item. Click the **Save** button on the Ribbon.
   The item closes, and the changes are saved to the item.

![Edit Item button](image)

**Figure 2-4:** The Manage group on the Ribbon.
Customizing a List

SharePoint includes two default view formats for lists: Standard view, which lets you view a list as a Web page, and Database view, which lets you view a list in a spreadsheet. You can further customize lists by creating a new view with different columns. You can also create a new column to display specific information.

Create a list view

A custom view lets you arrange the items in a list so that you can access the information you need quickly.

1. Open the list in which you want to create a new view.
   The list opens in Standard view.

2. Click the List tab on the Ribbon and click the Create View button in the Manage Views group.
   The Create View page appears. You can base the new view on a view format or a view that already exists in the list.

   Tip: To modify an existing view, open the list in the view you want to modify, click the List tab on the Ribbon, and click the Modify View button in the Manage Views group.

3. Select the view format or existing view on which you would like to base the new view.
   The Create View page appears.

4. Enter a name for the view in the View Name text box.

5. Specify the options you want to include in the view.
   Options will be selected according to the settings for the settings.

6. Click OK.
   The list is displayed using the new view.

   Tip: To switch to another view, click the List tab on the Ribbon, click the Current View list arrow, and select the view that you want to use.

Add a list column

Lists are created with a default number of columns, depending on the type of list that is created. Adding a column allows you to store more information about items in a list.

Exercise File: Event Photographers list

Exercise: Add an additional photographer:
   First Name: Jenny
   Last Name: Philips
   Business Phone: (718) 4578752
   Email: info@perfectpixels.com
   Website: www.perfectpixels.com

Create a new view of type Standard. Specify these options for the view:
   View Name: Email List
   Columns: Last Name, First Name, Email Address

Add the following new columns to the list:
   Column Name: Preferred Event Types
   Type: Single Line of Text

Figure 2-5: The new Email List view created in the Event Photographers list.
1. Open the list to which you want to add a column. The list opens in Standard view.

2. Click the List tab on the Ribbon and click the Create Column button in the Manage Views group.

   The Create Column dialog box appears. Here you can specify the information you want the column to store.

3. Enter the name of the column in the Column Name text box and select the type of data the column will contain.

   After entering the name and column data type, you can enter a description and set default settings for the column.

4. (Optional) Specify additional column settings in the Additional Column Settings section.

5. When the column specifications are set, create the column by clicking OK.

   The column is added as the rightmost column in the default list view.

   ✔ Tip: Uncheck the Add to default view check box to keep the new column out of the default view for the list.

   ✔ Tip: If a column does not appear in a view, modify the view and add the column to the view.

Figure 2-6: The new columns have been added to the bottom of the item list.
Deleting a List Item or a List

Removing items and lists that are no longer relevant keeps your SharePoint site updated and accurate.

Delete a list item

If you no longer need an item, delete it.

1. Point at the item you want to delete.
2. Click the Open Menu (…) button and select Delete Item from the list.
   A message appears asking you to confirm the deletion.
3. Click OK to confirm the action.
   The item is deleted.

Tips

✓ You can archive or move items that may be useful in the future, such as contacts, announcements, or links, instead of deleting them. Only delete items that are redundant, inaccurate, or irrelevant.

Delete a list

You can also delete an entire list and its items.

1. Open the list you want to delete.
   The list opens in Standard view.
2. Click the List tab on the Ribbon and click the List Settings button in the Settings group.
   The List Settings page appears.
3. Click the Delete this list link under the Permissions and Management column.
   A message appears asking you to confirm the deletion.
4. Click OK to confirm the action.
   The list is no longer stored in the site, and it will removed from the Quick Launch bar.

Tips

✓ Deleting a list also deletes all of the items on a list.
✓ By default, lists and list items are moved to the Recycle Bin when they are deleted. They are stored there for a set period of time and are then permanently deleted.
Managing Lists Review

Quiz Questions

1. What are some common types of lists?
   A. Links
   B. Announcements
   C. Tasks
   D. All of the above

2. Anyone can add an item to a list on a SharePoint site. (True or False?)

3. Which of the following are ways to customize a list? (Select all that apply.)
   A. Add items to a list.
   B. Create a new list view.
   C. Add a column to a list.
   D. Delete a list.

4. Which of the following is true?
   A. Deleted lists and list items are stored in the Recycle Bin for a set period of time.
   B. Deleting a list also deletes the items stored in the list.
   C. Neither of these statements is true.
   D. Both these statements are true.
Quiz Answers

1. D. Links, Announcements, and Tasks are all common types of lists.

2. False. Only users with the correct permissions can create items on a site.

3. B and C. Creating a new view and adding a column are ways to customize a list.

4. D. Both of these statements are true: deleted lists and items are stored in the Recycle Bin for a set period of time and list items are deleted with a list.
Lists are used to manage shared information and communication in a team site. Many of the most popular and useful tasks are done in lists.

This chapter provides a solid basis for some of the most basic tasks that can be done in SharePoint, such as adding announcements and events to lists on a team site. In some cases, users may not even need to know more than what’s in this chapter.
Adding an Announcement

Announcements are a great way to communicate small bits of information to other site members.

1. Open the Announcements list to which you want to add an announcement.

   Announcements are stored in a list.

   ✓ Tip: You can display the Announcements list on any site page by adding the Announcements as a web part.

2. Click the New announcement link at the top of the Announcements list.

   The New Item dialog box appears.

   ❗️ Other Ways to Create a New Announcement:
   - Click the Site Contents link at the bottom of the Quick Launch bar. Click the Announcements list to which you want to add an announcement.

3. Enter the name of the announcement in the Title text box.

   The name appears as the headline of the announcement.

4. Click the Body text box and enter the text of the announcement.

   The announcement should be brief. Insert a hyperlink if you need to include additional information.

   ✓ Tip: You can format text using the formatting properties on the Format Text tab of the Ribbon. You can also insert images and hyperlinks from the Insert tab on the Ribbon.

5. (Optional) Click the Expires text box and enter an expiration date.

   The Announcement will be removed from the Announcements Web Part on this date, but it will remain in the Announcements list.

   When the announcement is finished, you are ready to finalize it.

6. Click Save.

   The announcement is added to the Announcements list.

Exercise

- Exercise File: None required
- Exercise: Add a new announcement to an Announcements list with the following information:
  - Title: Another successful event - thanks Nicole!
  - Body: Congratulations to Nicole for another successful corporate event held on Friday. Our clients can't stop talking about your professionalism, out-of-the-box ideas and extreme efficiency.

Figure 3-1: Adding a new announcement from a list.

Figure 3-2: Creating a new announcement.
Adding a Contact

Contact lists let you store and share important contact information with other members of your team.

1. Open the contact list in which you want to add a contact.
   The contact list opens in Standard view.

2. Click the Add new item hyperlink at the top of the contact list.
   The New Item dialog box appears.

   **Other Ways to Add an Item to a List:**
   Click the Items tab on the Ribbon and click the New Item button in the New Group.

3. Enter the contact’s information in the New Item dialog box.
   You can fill in as much or as little information as you want, as long as the required fields are completed.

4. Click the Save button on the Ribbon.
   The item is added to the list.

---

Exercise

- **Exercise File:** Event Photographer Contacts list
- **Exercise:** Add a new contact for Jordan McMillan of “Black Frame Photography” with the e-mail address jmcmill@blackframephoto.com

![Figure 3-3: The New Item dialog box.](image)
Adding Links

Links are a great way to share Internet resources with other site members. Links make Web pages outside of SharePoint available in a central location.

Tips

✓ You can display a Links list on any site page by adding the Links as a Web Part.

1. Click the Settings button and select Site Contents from the list.
   The Site Contents page appears.

2. Click the name of the Links list to which you want to add a link under the Lists section.
   The Links list appears.

3. Click the New Link link at the top of the Links list.
   The New Item dialog box appears.

4. Enter the Web page’s address in the URL text box.
   Tip: Click the Click here to test hyperlink to make sure the Web page opens.

5. In the Type the description text box, enter the text you want to appear for the link.
   This text appears as the name of the link in the URL column of the Links list. This name helps users understand the purpose of the link. For example, “Employee 401k” might make more sense than “http://www.dncfinancial.com”.

6. (Optional) In the Notes text box, enter any notes that you feel are necessary in communicating the purpose of the link.
   The notes appear in the Notes column of the Links list.

7. Click the Save button.
   The link is created and appears in the Links list.

Exercise

Exercise File: An existing Links page
Exercise: Add a link to http://www.agiftcorp.com/ in the Links list
   Description: Corporate Gifting supplier
   Notes: If you don’t have Exhilar8’s login details, please get them from George

Exercise Figure 3-4: Entering link information.

Exercise Figure 3-5: The link as it appears in the Links list.
Viewing the Calendar

The calendar keeps site members connected and informed about upcoming events such as meetings or conferences.

Change the amount of time displayed

There are three ways to display the events in the default Calendar view: Day, Week, and Month scope.

1. If you have a Calendar on your site, click the link for it in the Quick Launch bar. Or use the Site Contents link to access it.

   The calendar opens in Calendar view, a graphic representation of the calendar.

2. Click the Calendar tab on the Ribbon.

   There are three ways to display the calendar:
   
   - **Day**: Day scope gives you an hour-by-hour breakdown of the schedule for the selected day.
   
   - **Week**: Displays the full seven-day week.
   
   - **Month**: Month scope is the default view in the Calendar. Month scope shows the schedule for the entire month.

3. Click the appropriate button in the Scope group.

   The calendar displays events accordingly.

Navigating the calendar

The calendar displays the current day, week, or month depending on the scope you have selected. Use the Date Navigator to view any date, either in the past or in the future.

1. Select the Calendar.

   The calendar appears. The Date Navigator appears at the top of the Quick Launch bar. The dates that appear depend on the scope that is selected.

   - **Day or Week scope**: The Date Navigator displays the current month.
   
   - **Month scope**: The Date Navigator displays the current year.

2. If necessary, click the Calendar tab on the Ribbon and change the scope of the calendar.

   The Date Navigator changes. You can move through the calendar in the Date Navigator by clicking the Previous and Next buttons.

---

**Exercise**

- **Exercise File**: An existing Calendar.
- **Exercise**: Open the calendar on a team site. View the calendar in Day, Week, and Month scope.

**Figure 3-6**: Click the appropriate button in the scope group to change the amount of time displayed in the calendar.

**Figure 3-7**: Use the Date Navigator to view past and future dates and events.
3. Select the date or month you want to view in the Date Navigator.

   The calendar displays the day or month you selected.

   ☑ Tip: Click link for today's date directly below the calendar in the Date Navigator to return to the current date.

**Change views**

Calendar view is the default view, but there are other views you can use to focus on different information.

1. Select the Calendar.

   The calendar appears.

2. Click the Calendar tab on the Ribbon and click the Current View list arrow in the Current View group.

   There are three views available:
   - **Calendar**: A graphical representation of the calendar and the events that are scheduled in it.
   - **All Events**: Displays all the events in the calendar as a list.
   - **Current Events**: Displays the events scheduled for today. Scroll to the next or previous day to view the events grouped by each day.

3. Select the view you want to use from the list.

   The calendar events are displayed accordingly.

---

**Figure 3-8**: A calendar in Day, Week, and Month scope.
Adding an Event to the Calendar

Events are items used in Calendar lists to indicate an appointment, meeting, deadline, or any other occasion that needs to be communicated to others using the site.

1. Select the Calendar.
   The calendar appears.

2. Click the Events tab on the Ribbon and click the New Event button in the New Group.
   The New Item dialog box appears. Here you can specify information about the event.

3. Type a description of the event in the Title field.
   The event title will appear in the calendar.

4. (Optional) Enter the event's location in the Location field.

5. Click the Calendar icon and select a date.
   You can create events that one day or multiple days.
   **Other Ways to Enter Date and Time:**
   Enter the date and time in the Start Time and End Time fields.

6. Click the Start Time list arrow and select a time.
   This is the time the event should start.

7. Click the End Time list arrow and select a time.
   This is the time the event is expected to end.
   **Tip:** Click the Make this an all-day activity that doesn't start or end at a specific hour check box if the event is an all-day event.

8. Enter additional information about the event if necessary.
   You can enter a description of the event, schedule an event to recur or occur all-day, or create a meeting workspace for the event.

9. Click the Save button on the Ribbon.
   The event is added to the calendar.

Exercise

- **Exercise File:** An existing Calendar.
- **Exercise:** Add an event to the calendar on a team site using the following information:
  - **Title:** Meet the new Planner, Sally-Ann
  - **Location:** Coffee Corner
  - **Start Time:** (select your own date) 10:00AM
  - **End Time:** (select your own date) 11:00AM
  - **Category:** Get-together

Figure 3-9: Adding a new event item to the Calendar.
Adding a Recurring Event

A recurring event is one that occurs on a regular basis. When you create a recurring event, a new event is automatically created for the schedule that you set for the recurrence. For example, if you know that your department has a meeting at 9 a.m. every Friday, you could create a recurring event for this meeting.

1. Select the Calendar.
   The calendar appears in Calendar view.

2. Click the Events tab on the Ribbon and click the New Event button in the New Group.
   The New Item dialog box appears.

3. Type a description of the event in the Title field and enter information about the event.
   See the table on the right, Table 3-1: Event Fields, for more information about the fields in the New Item dialog box.
   By default, an event is set to occur once. You must specify that the event is a recurring event.

4. Click the Make this a repeating event check box.
   Options for how the event should recur appear. Here you must specify the time of the event, how often the event should recur (for example, every Friday), and the start and end date of the recurrence.

5. Select the options for recurrence.
   You can save the event when you are finished editing it.

6. Click the Save button on the Ribbon.
   The event is added to the calendar.

---

Table 3-1: Event Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title*</td>
<td>The name is displayed in the calendar, so it should be something short and easy to identify.</td>
</tr>
<tr>
<td>Location</td>
<td>Where the event is to take place.</td>
</tr>
<tr>
<td>Start Time*</td>
<td>The date and time the event is set to begin.</td>
</tr>
<tr>
<td>End Time*</td>
<td>The date and time the event is set to end.</td>
</tr>
<tr>
<td>Description</td>
<td>Include a brief description of what the event is for or what will happen.</td>
</tr>
<tr>
<td>All Day Event</td>
<td>Select this option if the event lasts the duration of the date selected and has no specific start or end time. Birthdays, vacations, and trade shows are examples of all day events.</td>
</tr>
<tr>
<td>Recurrence</td>
<td>Select this option if the event will occur on a regular basis. When selected, options appear to let you set the recurrence schedule.</td>
</tr>
</tbody>
</table>

* indicates a required field
Viewing a Tasks List

Tasks lists help you organize the things that people need to do as a single task or part of a project.

There are several different views you can use with these lists. Knowing how to use list views can help you plan a project.

1. Open a tasks list.
   The tasks list opens in All Tasks view.

2. Click the List tab on the Ribbon.
   The table below, Table 3-2: Tasks List Views, describes each of the views available.

3. Click the Current View list arrow in the Manage Views group and select the view that you want to use.

Table 3-2: Tasks List Views

<table>
<thead>
<tr>
<th>View Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gantt Chart</td>
<td>A bar chart, or Gantt chart, presents a graphic representation of the tasks in the right pane of the view. The same tasks are listed in left pane view.</td>
</tr>
<tr>
<td>All Tasks</td>
<td>Displays all tasks in the list, regardless of their status.</td>
</tr>
<tr>
<td>My Tasks</td>
<td>Displays only tasks that have been assigned to you.</td>
</tr>
<tr>
<td>Calendar</td>
<td>Displays all tasks on the calendar.</td>
</tr>
<tr>
<td>Completed</td>
<td>Displays all completed tasks.</td>
</tr>
<tr>
<td>Late Tasks</td>
<td>Displays all tasks that are overdue.</td>
</tr>
<tr>
<td>Upcoming</td>
<td>Displays all tasks due on future dates.</td>
</tr>
</tbody>
</table>

Exercise

- **Exercise File:** A tasks list
- **Exercise:** Select the various views from the Current View drop down on the Ribbon to see the various display options.
Adding Tasks, Subtasks and Milestones

Tasks are specific jobs and activities that can be assigned to individuals. Tasks can be updated and tracked as work on the task progresses.

Create a Task

1. Open the tasks list where you want to add the task.

2. Click the **Tasks** tab on the Ribbon and click the **New Item** button in the New Group.
   
   The New task dialog box appears.

   **Other Ways to Create a Task:**
   
   Click the **New Task** link on top of the tasks list.

3. Enter a name for the task.
   
   The name should be short and easy to identify.

4. Enter the date on which the task should start.
   
   **Tip:** Click the **Calendar** button to select a date in calendar format.

5. Enter the date on which the task should be complete.

6. (Optional) Enter the name of the individual to whom you want to assign the task.
   
   The individual should be a member of the team site in which you are working.

   Select the **Show More** link.

7. (Optional) Enter a brief description of the task.
   
   The description might include instructions on how the task should be done or other notes that will help an individual complete the task.

8. If another task must be completed before the task you are creating can begin, select another task as a predecessor task. For example, "Compile mailing list" might be a predecessor task to "Send fliers".

5. (Optional) Select the level of priority for the task.
   
   The priority level helps users know how to prioritize the tasks that they are working on.

6. Select a status for the task.
   
   Click **Save**.

   The task is added to the Tasks list.

---

**Exercise**

- **Exercise File:** A tasks list
- **Exercise:** Add a three-day task named “Create website brief” in the tasks list

  - Add a task named “Design Brainstorm” as a sub-task to the one you just created. It is due on the first day of the project.

  - Add a milestone that marks the completion of the first brief.

**Figure 3-13:** The New Item dialog box.
Create a Subtask

Previous versions of SharePoint allowed you to specify whether you want to add a task or project task. This allowed you to allocate tasks to a specific project.

SharePoint 2013 only uses Task lists, but you can change a task into a project, by simply adding a subtask to a current task.

1. Open the Tasks list where you want to add the Subtask.
2. Point to the Task you want to add a Subtask to.
3. Select the Task’s Open Menu (…) button and then select Create Subtask from the list.
4. Enter a name for the Subtask, the date and who the task is assigned to.
   Select the Stop editing link at the top of the Tasks list to save your changes.
   The Subtask will now appear under the main task/project.

Create a Milestone

A Milestone marks an important point in a project. For example, it might mark the completion of several related tasks or the halfway point in the project’s duration.

A milestone is not an activity to be completed. It does not have a status, task duration, or priority. Insert a milestone whenever you need to mark a specific point in a project.

1. Open the Tasks list in which you want to create the milestone.
2. Point to the task you want to add the milestone to.
3. Select the Task’s Open Menu (…) button and then select Create Subtask from the list.
4. Enter a name for the milestone.
   The name should be short and easy to identify.
5. Enter the date which the milestone marks in the Start Date text box and in the End Date text box.
   The same date should appear in both text boxes.
   Tip: Click the Calendar button to select a date in calendar format.
6. (Optional) Enter a brief description of the milestone.
   The description might include information on what the milestone represents.

7. Click Save.
   The milestone is created.
   The milestone will appear as a blue diamond in the Gantt chart view.
Updating a Task

It’s a good idea to update the status of any tasks that are assigned to you. Update a task so that other site members know the status and progress that is made on a task.

1. Open the list where the task is saved.
2. Select the task you want to edit.
3. Click the Tasks tab on the Ribbon and click the Edit Item button in the Manage Group.
   A dialog box for the task appears.
   
   **Other Ways to Edit a Task:**
   Click the Open Menu (…) button for the task you want to edit, click the Open Menu (…) button again and then select Edit Item button from the list.
4. Enter an estimate of how complete the task is.
   For example, if you are about halfway done with the task, enter 50%.
5. Click the Task Status list arrow and select the appropriate status.
   
   If you can’t see the Task Status field, select the Show More link, the rest of the options available will appear.
   
   There are five statuses from which to choose:
   - **Not Started:** The task has not been started at all. This is the default status for tasks.
   - **In Progress:** The task has been started, but is not yet completed.
   - **Completed:** The task is fully completed.
   - **Deferred:** The task has been delayed or postponed.
   - **Waiting on someone else:** This task is waiting for another task to be completed before work can continue.
6. Edit other task fields as necessary and click Save.
   The task is updated.

Exercise

- **Exercise File:** A task named “Design Brainstorm” in a project tasks list.
- **Exercise:** Update the “Design Brainstorm” task as “In progress” and 25% complete.
Adding a Discussion Topic

A discussion board is a location where people can express their views and ideas in an online forum. The style is similar to a newsgroup, so that individuals can respond to posts and create their own discussion topics.

View a discussion topic

You can check on a discussion topic and its posts to follow conversations on the discussion board.

1. Click the name of the discussion topic you want to view from the Quick Launch bar or navigate to the site/page where the discussion board is.
   
   All the topics that have been started will appear on the discussion board.

   Other Ways to Open a Discussion Board:
   
   Click the Settings button and select Site Contents from the list. Click the name of the discussion board you want to view from the available list.

2. Click the name of a discussion topic.
   
   The original discussion topic post appears at the top of the page and replies to the topic appear below it.

Add a discussion topic

If you want to talk about something that is not related to an existing discussion topic or reply, you can always start a new discussion.

1. Click the name of the discussion board in which you want to create a new discussion from the Quick Launch bar or navigate to the site/page where the discussion board you want to access has been saved.
   
   All the current topics appear on the discussion board.

2. Click the New discussion link at the top of the list.
   
   The New Item dialog box appears.

   Other Ways to Add a Discussion Topic:
   
   Click the Items tab on the Ribbon and click the New Item button in the New Group.

3. Enter the name of the discussion topic in the Subject text box.
   
   The name will appear listed in the discussion board with other topics.

4. Enter the discussion topic in the body section.

Exercise

- Exercise File: A discussion board list.
- Exercise: Add a new discussion board topic called “Cardboard recycling” and this question: “Would we use this enough to justify the cost?”
Working with Lists

5. Select whether you want people to be able to respond to your question.

   Click **Save**.

   The discussion topic will now be listed on the discussion board.
Replying to a Discussion Topic

If you have something you want to say about a topic that has been posted, you can reply to the topic and contribute to the discussion.

1. Go to the discussion board and click the name of the discussion topic.

   The original discussion topic appears at the top of the page. Any replies to the topic appear below it, in the order that the replies were posted, with the name of the author.

   ✔ Tip: You can select to Reply to the discussion topic by clicking the Reply link, or click in the Add a reply box and type a reply.

2. Click Reply next to the item to which you want to reply to.

   The New Item dialog box appears. You can enter your response in the Body area, along with any other posts and replies that have been made in the discussion.

   ✔ Tip: This sequence of discussion topic and replies is called a string.

3. Add your reply to the topic or reply.

   Users can follow your contribution to the discussion best if your reply is attached to the most relevant item in the discussion, whether it’s the discussion topic or another user’s reply.

4. Click Reply.

   The reply is added to the bottom of the page.
Working with Issues

An Issue Tracking list lets you track the progress of communication about an issue until its resolution.

Add an issue

You can document important information in an issue, such as who owns the issue, if there are any related issues, and the date by which the issue should be resolved.

1. Open the Issue Tracking list in which you want to add the issue.
   The Issue Tracking list opens in Standard view.

2. Click the New Item link.
   The New Item dialog box appears.

   Other Ways to Add a New Item:
   Click the Items tab on the Ribbon and click the New Item button in the New Group.

3. Enter a name for the issue in the Title text box.
   The name should be short and easy to identify because it will appear in the Issue Tracking list.

4. (Optional) Enter the person responsible for the issue.
   You can assign an issue to a member of the team site in which you are working.

5. (Optional) Select a priority level from the list.
   The priority level helps users know how to prioritize the issues to which they are assigned.

6. (Optional) Enter a brief description of the issue.
   The description might include information about the issue. For example, you can ask users to describe any error messages they see or any actions they took prior to an error.

7. (Optional) Select an issue from the Related Issues area and click the Add button.
   Linking issues makes it easier to track and resolve related issues.

8. (Optional) Enter a due date for the issue’s resolution.
   This is the date by which the issue should be resolved.

9. Click the Save button.
   The issue is added to the issue tracking list.

Exercise

Exercise File: An Issue Tracking list.
Exercise: Add an issue with the following information:
   Title: Office Equipment
   Description: The equipment we ordered has not arrived. Please contact the supplier and get an ETA.
Working with Lists

**Edit an issue**

One important purpose of an Issue Tracking list is to track how an issue progresses. Edit issues as necessary to keep all communication in one location.

1. Open the Issue Tracking list where the issue is saved.
   The Issue Tracking list opens in Standard view.

2. Select the issue you want to edit.

3. Click the **Items** tab on the Ribbon and click the **Edit Item** button in the Manage group.
   The dialog box for the issue appears.

   **Other Ways to Edit an Issue:** Click the **Open Menu (…)** button for the issue you want to edit, select **Edit Item** button from the list.

4. Select the appropriate Issue Status.
   There are three statuses from which to choose:
   - **Active:** The issue is active and currently unresolved.
   - **Resolved:** The issue has been addressed and resolved.
   - **Closed:** The issue has not been resolved, but it has been addressed.

5. Enter any information about the issue in the Comments section.
   Site members working on an issue can add comments to an issue, keeping all their communication in one issue.

6. Edit any other issue fields as necessary and click the **Save** button.
   The issue is updated.

![Figure 3-23: Use the Comments area in the New Item dialog box to describe progress on the issue.](image)
Working with Lists Review

Quiz Questions

1. Announcements are displayed on the home page of a team site by default. (True or False?)

2. Contacts are only available for users who add the contacts to a list in SharePoint. (True or False?)

3. Which of these is not an example of a link that could be added to a team site?
   A. A link to the organization’s 401k program.
   B. A link to an online resource that is frequently used by team members.
   C. An e-mail address for an organization that users correspond with frequently.
   D. A link to an organization that users correspond with frequently.

4. Which of the following is not a scope available in SharePoint calendars?
   A. Month
   B. Work Week
   C. Week
   D. Day

5. Events are items that indicate an appointment or meeting on a SharePoint calendar. (True or False?)

6. Which of these is not a way to control a recurring event?
   A. The frequency of the event (Daily, Weekly, Monthly, Yearly)
   B. The number of times the recurring event will occur
   C. The rotating location of the event
   D. The start date of the first recurring event

7. How do you create a milestone?
   A. Click the Items tab on the Ribbon and click the Milestone button in the New group.
   B. Enter the same start date and due date for the task.
   C. Create the new task and click the Milestone check box in the New Item dialog box.
   D. You can only create milestones in the Project application.

8. Which of these options most accurately describes a discussion board?
   A. A bulletin board on which employees can post requests in an organization.
   B. A place where tasks and contacts can be stored for others to access.
   C. A list of posts and other entries that provide information on a topic.
   D. An online forum where users can discuss a topic.

9. Contribute to a discussion on a discussion board by replying to the topic. (True or False?)

10. Which of these statuses is NOT an issue status?
    A. Active
    B. In Progress
    C. Resolved
    D. Closed
Quiz Answers

1. False. You must add the Announcements list web part to a home page if you want to display announcements.

2. False. Contacts are available for all users that have access to the site in which the list is saved.

3. C. E-mail addresses should be used in contact items, not link items.

4. B. Work Week is not a default SharePoint scope.

5. True. Events are the calendar list items that indicate an appointment or meeting on a SharePoint calendar.

6. C. Recurring events don’t allow you to create a rotating pattern for the location of the events. The recurring series must all use the same location.

7. B. To create a milestone, create a new task and enter the same start date and due date for the task.

8. D. A discussion board is an online forum where users can discuss a topic.

9. True. Reply to a discussion topic to contribute to the conversation.

10. B. In Progress is not an issue status.
A library stores related files that team members can share with one another. For example, a library could store all of the press releases the public relations team writes in a year.

Libraries are also an easy way for a team or department to update and manage files in a central location. For example, all members of a writing department can make updates and changes to a document. Information about the updates is also recorded in the library.

Any type of file can be saved in a library, including documents, spreadsheets, presentations, pictures and forms.
Creating a Library

When you need a place on your SharePoint site to save and store files, create a new library. A library can hold documents and files that are related so it is easy for other team members to find the files they need.

The library also provides features that make it easy to collaborate on documents, such as the check in and check out feature and version history.

Tips

✓ You can only create libraries if you have the correct site permissions.

1. Open the site in which you want to add a library.
   By default, team sites are created with a document library called “Shared Documents”.

2. Click the Settings button and select Site Contents from the list.
   The Site Contents page appears.

   Other Ways to Add a Library:
   Select the Site Contents link from the Quick Launch bar.

3. Click the Add App button.
   A window appears, displaying all of the different lists, libraries and apps you can insert and create.

4. In the Find an app field, type in library and then press the <Enter> button.
   Refer to Table 4-1: Document Libraries, for more information about the types of libraries you can create.

5. Select the type of library you want to create from the available list.
   Information about each library can be found by selecting the App Details link below each option.

6. Enter a name for the library in the Add Document Library dialogue box.
   This name will appear in the Quick Launch bar of the site. Select Create.

7. (Optional) to select more settings, click the More Information (...) button on the top right hand corner of the new library on the Site Contents page and then select Settings.
   Additional settings for the library appear.
8. (Optional) Click the List name, description and navigation link to enter a description for the library. This description can explain the purpose of the library and the relationship between files.

9. (Optional) Under the Navigation section, choose if you want to display the library in the Quick Launch bar.

There are two options here:

- **Yes**: The library will be displayed in the Quick Launch bar. This is selected by default.

- **No**: The library will not be displayed in the Quick Launch bar, and users will have to find the library through alternate navigation methods. Only use this for libraries that you don’t want to make known to others or that won’t be used very often.

Select **Save**. You’ll be returned to the Settings page.

10. (Optional) On the Settings page select the Versioning Settings link to choose how you want to work with document versioning.

Document versioning allows you to create versions of files as you work on them, leaving a trail of changes. There are two options from which to choose:

- **Yes**: Each time you edit a document from the SharePoint library, a new version of the file will be created.

- **No**: You will not create a new version of the file each time you edit it. This is selected by default.

Once completed, select **OK** to return to the Settings Page.

11. (Optional) Select a default template for all new files created in the library; select the Advanced Settings on the Settings page. In the Document Template section you can specify a template URL or edit the current template.

The default selection should be correct, according to the type of library you choose to create.
## Working with Libraries

<table>
<thead>
<tr>
<th>Table 4-1: Document Libraries</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Document Library</strong></td>
</tr>
<tr>
<td><strong>Form Library</strong></td>
</tr>
<tr>
<td><strong>Wiki Page Library</strong></td>
</tr>
<tr>
<td><strong>Picture Library</strong></td>
</tr>
</tbody>
</table>
Creating a New Document in a Library

One way to add items to a document library is to create new items in the library. These items can then be opened and edited by other team members.

1. Open the library in which you want to create a new document.

Most libraries will be included in the Quick Launch bar.

2. Select the **Files** tab from the Ribbon and then click the **New Document** button in the New Group.

   **Other Ways to create a New Document in a Library:**
   Select the **Files** tab from the Ribbon and then click the **Upload Document** button in the New Group.

   A dialog box may appear, asking if you trust the source of the file.

   **Tip:** Click the **New Folder** button in the New Group to create a new folder in the library. Folders allow users to organize documents into further subcategories.

3. Click **OK**. If prompted, enter the password for your SharePoint account.

   The dialog box closes, and SharePoint prepares to open the new file on your computer. For example, if creating a new document, a new document would open in Word.

   **Tip:** Each library has a default template it uses to create a file. The type of document you create depends on the default template the library uses.

4. Work with the content of the file as you would normally. When you are finished, click the **File** tab and select **Save As** or Press `<Ctrl> + <S>`.

5. The Save As dialog box appears. Notice that the save location is on the SharePoint server, not your computer.

6. Enter the file name in the **File name** text box.

7. Click **Save** and close the file.

   The document or file closes. To open the file again, open it from the document library in which it was created.

### Exercise

- **Exercise File:** Marketing Letters document library
- **Exercise:** Create a new document called “Quotation Template” in the document library

---

**Figure 4-4:** The Save As dialog box.
Uploading a File or Document to a Library

You can upload existing documents to a library and make them available for site members.

Upload a document

Uploading a single document to a library is a quick way to make the document available to other people on your team.

1. Click the name of the library to which you want to upload a document in the Quick Launch.
   All the documents currently saved in the library are listed, with basic information about each document.

2. Click the New document link.
   The Create a new file dialog box appears.

   Other Ways to Upload a Document to a Library:
   Click the Files tab on the Ribbon and select the Upload Document button in the New Group.

3. Click the Browse button.
   The Add a document dialog box appears. Here you can navigate to any document or file on your computer.

4. Select the document you want to upload from your computer and click Open.
   The file path for the document appears in the Choose a file text box. Select OK.

5. A new dialog box may open, depending on your versioning settings. Check the Add as a new version to existing files check box and add a description in the Version Comments text box.
   This step depends on the versioning guidelines used at your organization.
   Tip: This step only appears if versioning has been enabled in the library.

6. (Optional) Enter a title for the document, then click Save.
   The document is uploaded.
Upload multiple documents
If you have multiple documents to upload, you don't have to add them one at a time. Follow these steps to upload several documents at once.

1. Select the library to which you want to upload a document.
   All the documents currently saved in the library are listed, with basic information about each document.

2. Click the Files tab on the Ribbon and click the Upload Document button list arrow in the New group.
   The Add a document dialog box appears.

3. Select the Upload files using Windows Explorer instead link.
   If prompted, enter the password for your SharePoint account.

   Open another Windows Explorer window and navigate to the file/s or folder/s you want to upload.

5. Click the file/s or folder/s you want to upload and drag it to the Windows Explorer window that displays the document library.
   Tip: Press and hold the <Ctrl> key to select multiple files.

6. The files will be copied across to the document library.
   Depending on the size of the upload and your connection speed, it could take several minutes for all your files to upload.

7. Once all files have been uploaded, refresh your document library to see the new documents.

Tips
✓ You can only upload files to libraries if you have permission to do so. If the Upload Document button is not available, then you have not been given permission to add documents to the library.
Opening and Editing a Document

Document libraries make it easy to open and access documents.

Open a document

1. Open the library where the document is saved.

2. Click the name of the document.
   The Open Document dialog box may appear, asking how you would like to open the file.
   ✔ Tip: You may also be asked to enter your user name and password to open the document.

3. Select Allow and on the next window select Yes.
   The document appears on your desktop in the program for which it is compatible.

Edit a document

If you have the right set of permissions, you can edit a document saved in a document library.

1. Open the document you want to edit.
   If you do not have permission to edit a document, it will open as read-only.

   ☀ Other Ways to Edit a Document:
   Select the document you want to edit, click the Files tab on the Ribbon, and click the Edit Document button in the Open & Check Out group.

2. If necessary, click the Enable Editing or the Edit Document button beneath the Ribbon.
   The document is no longer in read-only mode.

3. Edit the document as you would normally.

4. Save and close the document when you are finished.
   The document is changed, and its changes are available for other users.

✔ Tips
✓ Libraries may require users to check out documents, in which case simply opening a document would not be possible.

Exercise

• Exercise File: North Shore Mailing.docx
• Exercise: Open the North Shore Mailing document and change the date on the first page to today’s date

Figure 4-7: When opening the document, it will open up in read-only mode by default. To edit, select the Edit Document button.

Figure 4-8: A SharePoint document open for editing in Word.
Checking Out and Checking In a Document

The check in and check out feature ensures that document collaboration works smoothly. When you check out a document to make changes, no one else can access the document. The document will still appear in the library, but it will be unavailable to other people. Once you are finished working with the document, check in the document so it is available to other people once again.

Check out a document

Check out a document in order to make changes to it. If you don’t check it out, another team member might try to work on the document at the same time.

1. Open the library containing the document you want to work with.
   The library opens in Standard view.
2. Click the check box next to the file you want to check out.
   The file is selected.
3. Click the Files tab on the Ribbon and click the Check Out button in the Open & Check Out group.
4. The document is checked out. Note that the icon next to the document changes to indicate the document is checked out.

   Once the document is checked out, you can open the document from SharePoint.

Other Ways to Check out a Document:
Point to the document you want to check out and click the Open Menu (…) button, then select Open Menu (…) and then select Check Out from the list.

Check in a document

When you are finished making changes to a document that you have checked out, check it back in so other people can access your changes.

1. When you are finished making changes to the document, save and close the document.

Tip: When you close the document, you may be asked if you want to check the document back in, click Yes, enter version comments if necessary and click OK. If you do this, the following steps won’t be necessary.
2. Open the document library where the document is saved in SharePoint.
   The library opens in Standard view.

3. Click the check box next to the file you want to check in.
   The file is selected.

4. Click the Files tab on the Ribbon and click the Check In button in the Open & Check Out group.
   The Check in dialog box appears.
   - Retain Check Out: Select Yes if you want to save the document on SharePoint, but keep it checked out to you so no one can access the document. Select No to check in the document and allow others to access it.
   - Comments: Add notes about the changes you made to the document when you checked it out.
   - Versioning: If the creator of the library has enabled versioning, you will have to choose what version number to give the document.

Other Ways to Check In a Document:
Point to the document you want to check in and click the Open Menu (…) button, select Open Menu (…) and then select Check In from the list.

5. Enter the check in options as necessary and click OK.
   The document is checked in and is accessible to other people.

Tips
✓ This option is only available in document libraries. Other types of libraries do not have this feature.
✓ Check out can be required for a document library. To require check out, click the Library tab on the Ribbon and click the Library Settings button in the Settings group. Click the Versioning Settings link under the General Settings column and select Yes in the Require Check Out section.
Enabling Versions History

Versioning is a library feature that tracks revisions to documents. This is a helpful way to record the changes a document has undergone over time. Document libraries must have versions enabled in order to record versions of the documents saved in the library.

1. Open the library in which you want to enable versioning.
   The library opens in Standard view.

2. Click the Library tab on the Ribbon and click the Library Settings button in the Settings group.
   The Document Library Settings page appears.

3. Click the Versioning Settings link under the General settings section.
   The Versioning Settings page appears. This page provides a set of controls for the library.

4. In the Document Version History section, select the version scheme you want to use.
   There are two ways to track versions:
   • **Create major versions**: An example of a major version is an added section or chapter in a document. Choose this option if there aren’t many people who will be editing documents.
   • **Create major and minor (draft) versions**: This option can create a more meaningful version history. For example, changes such as spelling errors or drafts are considered minor versions, while major changes indicate new sections or chapters.

5. (Optional) Choose the number of versions to retain.
   These two options prevent the library from being too cluttered. However, you may also lose important versions if you limit the number of versions that are saved.

6. Click OK.
   Versioning is enabled in the library.

Tips
✓ Lists can also have versioning enabled in them.

Exercise

- **Exercise File**: Marketing Letters library
- **Exercise**: Enable versioning in the Marketing Letters library

Figure 4-12: Versioning Settings for a document library.
Using Versioning History

After you have enabled versioning, you can use this information to manage content. Versioning lets users add new versions of documents and review previous versions of files as needed.

Add a version

When minor versioning is enabled, users can add major versions of documents whenever necessary.

1. Open the library in which you want to save a new document version.
   The library opens in Standard view.

2. Click the check box next to the document you want to publish.
   The document is selected.

3. Click the Files tab on the Ribbon and click the Publish button in the Workflows group.
   The Publish Major Version dialog box appears.

   **Other Ways to Publish a Major Version:**
   Point to the document to which you want to add a new version. Select the Open Menu (…) button, select the Open Menu (…) again and then select Publish a Major Version from the list.

4. Enter text describing the version in the Comments text box. Click OK.
   The version is added, and it is now the primary document available in the library.

   **Other Ways to Add a Version:**
   Once versioning is enabled in a library, any change to the document is automatically saved as a new version of the document. Or, check out the document, make changes, and specify version information when checking the document back in.

**Tips**

✓ Version information is required when a document is checked in, so new versions are automatically published at check in.

✓ When versioning is turned on, versions of documents are automatically tracked and saved. You do not need to publish a version or check out the document to save a version.

---

**Exercise**

- **Exercise File:** Marketing Letters library and North Shore Mailing.docx
- **Exercise:** Open the “North Shore Mailing” document and make changes. Publish the document as a major version. View the version history of the “North Shore Mailing” document.
View version history

If versioning has been enabled in the document library in which a file is saved, you can go back and view past versions of the document.

1. Open the library that contains the version history you want to view.

2. Click the check box next to the document for which you want to view versioning.

3. Click the Files tab on the Ribbon and click the Version History button in the Manage group.

The versions that are saved and their comments appear in the Version History dialog box.

Figure 4-14: The version history for a document.
Uploading Pictures

Upload an image from your computer to a picture library in order to share the image with other members of the site.

1. Open the picture library to which you want to add the image.
   Picture libraries are listed on the Site Contents page.

2. Click the **Files** tab on the ribbon and then select **Upload Document** in the New Group.
   The Select Picture dialog box appears. Now just identify the picture that you want to upload.

   **Other Ways to Add a New Item:**
   Scroll to the bottom of the library list and click the **Add new item** link.

3. Click the **Browse** button.
   The Choose a File to Upload dialog box appears.

4. Navigate to the location of the image and select the image. Click **Open**.
   The file path of the image appears in the Choose a file text box.

5. Click **OK**.
   The image is uploaded. Another dialog box appears where you can add more information about the image.

6. Verify the name of the image in the Name text box.
   The name will appear as the name of the item in the picture library. The name should be HTML friendly, so do not use any spaces in the name.

7. (Optional) Complete the remaining options.
   The remaining options aren’t necessary, but the images will be more useful if relevant information is attached to them. For example, keywords make the picture easier to search for, and a description helps distinguish the image from similar images in the library.

8. Click **Save**.
   The image appears in the picture library.
Managing Pictures

Working with picture libraries, can be a bit different to working with other types of libraries. Being able to share, view and edit images within your site allows for flexibility and provides site users with engaging content they can use.

Changing Image Views

To make it easier to work with the images in your picture library, you can change how the images are displayed. By default, images in a library are displayed in a Thumbnails view.

1. Select and open the picture library you want to change the view for.
2. Click the Library tab on the Ribbon, and in the Manage Views group, select the Current View drop down.
3. Select an option from the list provided.
   - **Select Thumbnails**: to see the images as smaller preview versions.
   - **Select All Pictures**: to see the images displayed as a list of files.
   - **Select Slides**: to see the images like a slide show, where you can browse through them using a forward and backward arrow.

   Another way to change your Image View: Click the appropriate link from on top of your screen.

Selecting Images

Depending on the View you have selected, there are different ways to select one, or multiple images.

1. Select and open the picture library you want to work with.
   - **Trap**: You cannot select an image when the Slides view is selected.
   - **Thumbnail view**: point to the image you want to select and click on the “**tick**” in the bottom left corner.
   - **All Pictures view**: point to the image file you want to select and click the “**tick**” to the left of the file name.
   - **Tip**: use the same methods to deselect images.
2. Once selected use menu options available to execute required actions with the pictures. **Note**: when selecting multiple images, available options become limited.

Exercise

- **Exercise File**: A picture library
- **Exercise**: Change the images in your picture library to the All Pictures view, select one of the listed images and then download it.

![Picture Library – Thumbnail view](image1)

![Current View links](image2)

![Selecting a Thumbnail view image](image3)

![Selecting an All Pictures view image](image4)
**Editing Picture Properties**

You can change a file name, add metadata and other helpful information to make it easier for other users to find and use an image.

1. Select and open the picture library containing the images you want to edit.
2. Select the image you want to edit.
3. Click the **Files** tab and select **Edit Properties**, from the Manage group.

   Another way to access the Image File Properties: Point to the image and click the **Ellipsis (...)**, click the next **Ellipsis (...)** and select **Edit Properties** from the list of options.

4. You can change the image Name, Title, specify the Date and Time the image was taken. You can also provide a Description for the image, as well as Keywords that can assist other users to find the image.

   Change and add the information as required and click **Save**.

**Downloading Pictures**

You may want a copy of a specific image locally. If you need to, you can download a copy of an image from a SharePoint library.

1. Select and open the picture library containing the images you want to download.
2. Select the image you want to download.
3. Click the **Files** tab and select **Download a Copy** from the Copies group.
4. On the Browser security prompt, select **Save** and then select **Open**.

   Tip: Downloaded files are kept in the Downloads folder by default. Depending on the program you use to view images, you may be able to save the opened image from here to a different location, if required.

**Deleting Pictures**

If at any time, you need to remove or delete a picture from a library:

1. Select the image you want to delete.
2. Click the **Files** tab and select the **Delete Document** button in the Manage group.

   Another way to Delete an Image: select the image and press `<Delete>`.
Working with Libraries Review

Quiz Questions

1. Which of these is not a type of library you can create in SharePoint?
   A. Web Page
   B. Wiki Page
   C. Document
   D. Picture

2. You can only upload items to add them to a library. (True or False?)

3. Documents can only be uploaded to a library one at a time. (True or False?)

4. You can open a document saved in a library to view or edit it. (True or False?)

5. Documents that are opened as read-only cannot be edited. (True or False?)

6. You can open a document saved in a library to view or edit it. (True or False?)

7. When a document is checked out, other users cannot open or view the document. (True or False?)

8. What is the difference between a major and a minor version?
   A. A major draft indicates major changes in the document content, and a minor draft indicates small changes.
   B. A major draft includes changes made by a site owner, while a minor draft includes changes made by a site visitor.
   C. A major draft includes changes made to new documents, while a minor draft includes changes made to old documents.
   D. The draft is automatically assigned according to the number of changes made.

9. You can publish a major version of a document in any library, even if versioning is not enabled. (True or False?)

10. You cannot change the name of an image once you've uploaded it. (True or False?)

11. Which View option would you select, if you wanted to preview the images in a Pictures Library as smaller versions.
    A. Slides view
    B. Thumbnails view
    C. All Pictures view
    D. Preview view

12. You can change the name and description of an image in a Pictures library. (True or False?)
Quiz Answers

1. A. Web page is not a type of library you can create in SharePoint; Wiki Page, Document and Picture are types of libraries that can be created.

2. False. You can create new items in a library.

3. False. Several documents can be uploaded to a library at a time using the Upload Multiple Documents dialog box.

4. True. Open a document to view or edit the document.

5. True. Read-only documents cannot be edited. If there is version control on the document, you will need to Check Out the document before editing. If there is no version control on the document, you will need to Enable Editing before changes are made.

6. True. Open a document to view or edit the document.

7. True. A document is not available for viewing or editing when it is checked out. It must be checked in again to be available for other users.

8. A. A major draft indicates major changes in the document content such as a new paragraph, and a minor draft indicates small changes such as a typo correction.

9. False. You can only publish a new version of a document in a library in which versioning has been enabled.

10. False. You can change the name so it appears as something that makes sense in the Pictures library.

11. B. Selecting the Thumbnails view, will allow you to preview the images in your Pictures Library.

12. True. By accessing the image Properties, you can add keywords, change the name, description and even the image title.
Working with Blogs and Wikis

Creating a Wiki Site .............................................. 75
  Create a wiki site ........................................... 75
  View a wiki page ............................................ 76

Working with a Wiki ........................................... 77
  Add a wiki page ............................................. 77
  Edit a wiki page ............................................. 78

Creating a Blog .................................................. 79

Writing a Blog Post ............................................ 81
  Write a blog post .......................................... 81
  Approve or reject a post ................................. 81

Working with a Blog ........................................... 82
  Read a blog .................................................. 82
  Comment on a post ......................................... 82
  Subscribe to a blog RSS feed ......................... 83

This chapter covers the main collaboration subsites that can be added to a team site: blogs and wikis. These sites have their own pages and organization, and are a great way to complement the objects and features available in a team site.

The Document Workspace and Meeting Workspaces available in previous versions have been discontinued in SharePoint 2013.

We’ll discuss the basics, such as how to create each site, settings that are available, and how to add to and work with each site.
Creating a Wiki Site

A wiki is a collaborative way to build knowledge. Users can share their collective expertise to create a more complete resource than if one person provided all the information. Users can also critique and edit entries created by others to ensure that the information is accurate.

Some excellent uses for a wiki include gathering knowledge and data, creating an instruction guide for new employees, and brainstorming ideas and designs.

Tips

✓ *Wikiwiki* is a Hawaiian word that means “quick.”

Create a wiki site

1. Open the site in which you want to include the wiki.

2. Click the Settings button, select Site Contents and then select Add App from the list provided.

3. Find and select Wiki Page Library from the list of available apps.

4. Enter the Name for the wiki site in the create dialogue box and select Create.
   
   This text will appear in the Quick Launch bar, so the name should be short and easy to identify.

   Other Ways to Add a Wiki Site:
   Select Site Contents from the Quick Launch bar and then select Add App from the available options.

5. (Optional) On the Site Contents page, click the More Info (…) button on the newly created wiki library and then select Settings.

   Additional settings for the wiki site appear.

6. (Optional) Click List name, description and navigation under the General settings heading so you can enter a description for the wiki or change the name in the general settings section.

   The description can explain the purpose of the wiki and what kind of information should be documented in it.

Exercise

- **Exercise File**: None required
- **Exercise**: Create a new wiki site called “Team Wiki”
Working with Blogs and Wikis

7. (Optional) you can also choose if you want to display the wiki in the Quick Launch bar under the general settings.

There are two options here:

- **Yes:** The wiki will be displayed in the Quick Launch bar. This is selected by default.

- **No:** The wiki will not be displayed in the Quick Launch bar, and users will have to find the library through alternate navigation methods. Only use this for wikis that you don’t want to make known to others or that won’t be used very often.

**View a wiki page**

Find the wiki page you want to view or contribute to on the wiki site.

1. Click the wiki you want to open in the Quick Launch bar.

The wiki appears with the Home page displayed.

**Other Ways to View a Wiki:**

Click the **Site Contents** link in the Quick Launch bar and then select the relevant wiki from the available options. Alternatively, click the **Settings** button and select **Site Contents**, and then select the wiki you want to view from there.

![Figure 5-2: Depending on the settings, Wikis are listed in the Quick Launch bar.](image-url)
Working with a Wiki

Once a wiki site has been created, users can add new pages and links to pages within the site.

Add a wiki page

If there is a topic that needs to be addressed, or you feel you need to contribute information, or add an idea, you can add a new wiki page to the site.

The process for adding a new page includes first creating a link to the page, and then clicking that link to create the new page.

1. Open the page to which you want to link the new page.

2. Click the Page tab on the Ribbon and click the Edit button in the Edit group.

   You can change the text of the page, including adding links to new wiki pages.

3. Enter the name of the new page enclosed in double brackets.

   For example, type `[[Help]]` to create a link to a page named Help.

   There are two options for adding a wiki page:

   - **Link to a previously created page**: As you type, a list of previously created pages appears. You can select one of these pages and link the wiki page to the previously created content.

   - **Link to a blank wiki page**: You can also create a blank wiki page using the text as a placeholder. When you have typed the text, it will link to a blank wiki page.

   **Tip**: To give the new page a name that is different from the name of the link, type the page name, insert a vertical bar (| on your keyboard) and then type the link name. For example, to create a link named “Using Help” to a page named “Help”, you’d enter `[[Help|Using Help]]`.

4. Click the Save button in the Edit group on the Ribbon.

   The wiki page is created.

5. Click the link to the page you just created.

   The New Page dialog box appears. Here you can indicate if you want to create a new page from the link placeholder you previously entered.

Exercise

- **Exercise File**: Team Wiki site
- **Exercise**: Add a new wiki page called “The Team”
  Add a link on the above to a page called “Nicole: Expert Planner”.

![Figure 5-3: Links to previously created wiki pages appear when you type your wiki page.](image)

![Figure 5-4: The New Page dialog box.](image)
6. Click Create.

A blank wiki page appears.

**Edit a wiki page**

One advantage of using a wiki is that there is not a single anointed expert: everyone contributes some knowledge, expertise, and insight. So one person can begin the process of creating a wiki entry, another can edit the entry if it is incorrect, and yet another person can add more information.

1. Open the page you want to edit.

   The wiki page appears.

2. Click the Page tab on the Ribbon and click the Edit button in the Edit group.

   The page opens in edit format.

   **Tip:** Wikis allow multiple people to edit a single page at one time. If you want to make sure you are the only person editing a page, click the Check Out button in the Edit group on the Ribbon.

3. Enter or change the content and text of the page as necessary.

   Note that you can use the commands in the Format Text tab on the Ribbon to format text. You can also use the commands in the Insert tab on the Ribbon to insert pictures and other items in the page.

4. Click the Save button in the Edit group on the Ribbon.

   The wiki page is updated to reflect the changes.

---

**Figure 5-5:** A wiki page after it is created. Note the link for a new wiki page, marked by a dashed underline.

**Figure 5-6:** Use the options on the Ribbon to format wiki text.
Creating a Blog

A blog is a great way to share information. Generally, a blog is written by someone who can provide valuable insight and information on a topic, such as the manager of a department or the leader for a development team. Blogs can be used by these individuals as an informal way to pass on important information, such as why a certain policy has changed, or specific tips and tricks to watch out for when rolling out a new product.

Tips

✓ The word “blog” is short for “web log”.

1. Open the site in which you want to include the blog.

2. Click the Settings button and select Site Contents.

3. In the Subsite section, select new subsite.

4. Enter a name for the blog site.
   The title should be short and easy to identify.

5. Add the URL name of the site.
   Users can navigate to this URL to access the site directly.

6. In the Template selection section, select Blog.

7. Select the permissions you want to use under the Permissions section.
   Select who can access the blog:

   • **Use unique permissions**: This option lets you choose who can access the blog and what level of access each individual is assigned.

   • **Use same permissions as parent site**: This is the default option, and the easiest option. Use this if you want people to access this site as they do the parent site, or the site under which the blog site is being created. If you choose this option, permissions can only be changed along with the permissions of the parent site.

---

**Exercise**

- **Exercise File**: None required
- **Exercise**: Create a new blog called “gr8 Events”

---

Figure 5-7: On the Site Contents page, scroll to the bottom and select New Subsite
8. (Optional) Under the Navigation section, choose if you want to display the library in the Quick Launch bar.

Select one of these options:

- **Yes**: The blog will be displayed in the Quick Launch bar.
- **No**: The blog will not be displayed in the Quick Launch bar, and users will have to find the blog by alternate navigation methods. This is selected by default.

9. (Optional) Under the Navigation section, choose whether to display this site on the top link bar of the parent site.

There are two options here:

- **Yes**: The blog will be displayed in the top link bar. This is selected by default.
- **No**: The blog will not be displayed in the top link bar, and users will have to find the blog through alternate navigation methods.

10. (Optional) Under the Navigation Inheritance section, choose how the top link bar will look. This determines how the site will look for members:

- **Yes**: The top link bar that is displayed in the blog site is the same as the top link bar that appears in the parent site.
- **No**: Only the tab for the blog site and any of its subsites will appear in the top link bar. This is selected by default.

11. Click **Create**.

The site is created.

---

**Figure 5-8**: Select the Blog template when creating a new blog site

**Figure 5-9**: A new blog site.
Writing a Blog Post

The great thing about a blog is that you don’t have to worry about form or structure - just say what you have to say and publish it for anyone to read.

Write a blog post

1. Open the blog to which you want to add a post.
   Your blog appears, displaying your most recent blog post on the top of the list.
   
   ![Tip: If the blog does not appear in the top link bar or in the Quick Launch bar, click the Settings button and select Site Contents and click the name of the relevant blog under the Subsites section.]

2. Click the Create a post link under Blog Tools on the right side of the page.
   The New Item dialog box appears.

3. Enter the title of the post in the Title text box and enter the body of the post in the Body area.
   This is what will appear on the blog page. You can use the Format Text tab on the Ribbon to format text. You can also insert images and tables using the Insert tab on the Ribbon.

4. (Optional) Select a category from the Category box and click Add.
   Categories are optional, but they make it easy to find related posts.

5. (Optional) Set a date and time when you want the post to be published.

6. In the Ribbon click Save as Draft or Publish.
   The option you choose determines when the blog post will be published:
   - **Publish**: Posts the entry on the blog immediately. This option is only available to users with Full Control permissions.
   - **Save as Draft**: Lets you save a draft of the post to be published another time.

---

**Exercise**

- **Exercise File**: gr8 Events blog
- **Exercise**: Add a blog post called “Fire & Ice Corporate Event” in the gr8 Events blog

---

**Figure 5-10**: Creating a blog entry in the New Item dialog box.
Working with a Blog

A blog is a single web page that displays entries that have been posted to the blog. Blog entries are posted reverse chronologically, which means the newest entries are displayed at the top of the page.

Read a blog

To read a blog, all you have to do is find the blog site in SharePoint. Since blogs are usually subsites of team sites in SharePoint, they are often listed on the top link bar.

1. Navigate to the site where the blog is created and click the blog name tab on the Top Link bar.

   The blog page appears with the most recent entry at the top of the page. Note that the date the entry was published appears at the top of the entry.

   Other information about the post, including who wrote the post, the category, and the number of comments to the post appear along the bottom of the entry.

   Other Ways to Find a Blog:
   Click the Settings button and select Site Contents. In the Subsite section select the relevant blog from the list.

2. Scroll down the page to view earlier posts.

   The posts are listed from most recent to earliest.

Comment on a post

Another advantage to blogs is that anyone can respond to an entry. This is a great way for blog readers to give feedback to the blogger (the author of the blogs) or to ask a question about a blog entry.

1. Click the Comment(s) link underneath the blog post to which you want to respond.

   The page displays the blog entry, comments made to the post, and an area to add comments.

2. Add your comments in the text box.

   Note that you cannot add any formatting or objects to comments.
3. Click **Post**.
   
The comment is added to the blog post.

---

**Tips**

- To view comment to a blog entry, click **Comment(s)** under a blog entry. Or, click the title of the blog entry. The blog entry is displayed with comments below it.

---

**Subscribe to a blog RSS feed**

Subscribing to a blog is an easy and efficient way to keep up on blogs without having to visit each one to find out if there are new postings. The RSS (Really Simple Syndication) keeps track of the blog for you, and lets you know when posts have been added. The updates are accessible either in Internet Explorer, or Outlook (2003 onwards).

1. Open the blog to which you want to subscribe.
2. Click the **RSS Feed** link on the bottom right of the Blog screen.
   
The RSS feed page for the blog appears.
3. Click **Subscribe to this RSS feed** link on the top of the page.
   
Outlook will display a number of prompts to confirm your subscription to the RSS feed.

---

**Tips**

- If you have Outlook 2007 or higher on your computer, you also receive e-mail updates when a new blog entry is posted. Look under RSS Feeds in the Folder Pane for the name of the blog. Blog updates appear as unread mail.

---

**Figure 5-13:** The RSS feed screen for a blog.

**Figure 5-14:** Confirmation message in Outlook 2013
Working with Blogs and Wikis Review

Quiz Questions

1. Where does ‘wiki’ come from?
   A. Wiki comes from the Hawaiian word ‘wikiwiki,’ which means ‘quick.’
   B. Wiki is an acronym for the phrase, Working for Insight, Knowledge and Intelligence.
   C. Wiki is a Polynesian word for ‘light’.
   D. Wiki is short for ‘wireless kiack,’ an Internet add-on for laptops.

2. Wikis are a collaborative information gathering tool that can be used to create:
   A. An online encyclopedia
   B. A resource for new employees
   C. A forum for brainstorming
   D. All of these.

3. Which of these best defines a blog?
   A. A blog is a collaborative way to create an online encyclopedia.
   B. A blog is a social networking tool.
   C. A blog is a collection of entries created by an individual to share information with others in an informal style.
   D. A blog is a place to store documents in SharePoint.

4. If a blog post doesn’t immediately appear in a blog, it may be waiting for approval. (True or False?)

5. Blog posts are listed chronologically, meaning the most recent posts appear at the bottom of the page. (True or False?)
Quiz Answers

1. A. Wiki comes from the Hawaiian word ‘wikiwiki,’ which means ‘quick.’

2. D. Wikis can be used to create: an online encyclopedia; a resource for new employees; and as a forum for brainstorming ideas.

3. C. A blog is a collection of entries created by an individual to share information with others in an informal style.

4. True. If a blog entry doesn’t appear on the blog, it may be waiting for approval by someone with proper rights.

5. False. Blog post are listed in chronologically reverse order, meaning the most recent posts appear at the top of the page.
Using SharePoint with Office

Office 365 Integration ................................. 87
Outlook ............................................... 87
Tasks ................................................. 87
Calendar ........................................... 88
People ............................................... 88
More .................................................. 89

Synchronizing Lists and Libraries with Outlook .................................................. 90
Synchronize lists with Outlook ................. 90
Copy events, tasks, and contacts between Outlook and SharePoint lists .......... 90
Synchronize document libraries with Outlook ............................................... 91

Saving a File to a SharePoint Library .............. 92
Export Lists and Libraries to Excel .......... 93

Microsoft Office SharePoint Server 2013 is equipped with tools that make it a perfect complement to other programs in the Office 2013 suite. For example, its integration with Word makes it easy for multiple people to share and edit a document; synchronization with Outlook makes it easy to share events and contacts.
Office 365 Integration

It’s taken a while, but Microsoft have reached a place where they have been able to provide a completely integrated experience.

Almost all the Office applications are somehow linked, and SharePoint is no exception. Besides being able to create, upload and share documents on SharePoint, as well as create and manage your own Blog and Newsfeed. You also have online storage space available on OneDrive and a central location to access all your followed and frequently accessed SharePoint sites.

In addition to all this, Microsoft have included a space for your Outlook Inbox, Calendar and People, so you can quite literally access everything you need, from wherever you are. All you need is an applicable Office 365 Subscription and your organizational credentials.

Outlook

SharePoint makes use of the Outlook Web App, which you can also setup and sync with other mobile devices like your iPad and Smartphone. This makes it extremely easy to access and use your email from any device and any location, even if you’re offline.

It looks very similar to Outlook 2013, the only difference is that you do not have full “Backstage” functionality, so use is limited to basic functions.

Trap: Some app features in Outlook Web App are only available when using Exchange.

1. To access your mail from SharePoint, click Outlook on the Navigation bar.

2. On your first use, you will be prompted to select your Language and Time Zone, from the drop down lists provided. Make your selections and click save.

The Outlook Web App will open, ready for use. The layout and available commands are very similar to Outlook 2013, so you will easily be able to navigate through, and accomplish all the standard mailbox functions from here.

Tasks

Tasks on the Outlook Web App, may look different to your standard Outlook Tasks, but it’s still easy to use and a great way to organize your time from wherever you are.

1. Click Tasks, below your Outlook Web App Mailbox.

   • On your Tasks window, you can view and sort all your active, overdue and completed Tasks, by

Exercise

- Exercise File: None required.
- Exercise: Add a new Outlook Web App Task, to collect Sally-Ann’s security pass at 10:30am.
  Add Sally-Ann’s details to People – Her details: Sally-Ann Richards, Mobile: (212) 555 1234, Birthday: Aug, 25 1978
  Location: New York Office.

Figure 6-1: Office Integration on the Global Navigation bar

Figure 6-2: Outlook Web App Mailbox

Figure 6-3: Outlook Web App Task viewing options
Using SharePoint with Office

clicking the appropriate tab, or option, at the top of your screen.

- Additional information appears to the right of the selected Task. Here, you can click edit, or More actions (…), in order to modify or delete the selected Task.

- Click new task, to create a new Task. Fill in all the required Task details and click Save.

✅ Tip: Any Task you create or modify, using the Outlook Web App, will be updated on your Outlook Tasks as well.

Calendar

You can also manage your calendar from the Outlook Web App on SharePoint. Make appointments, set reminders, create multiple calendars, link and share calendars with others.

1. To access your calendar from SharePoint, click Calendar on the Navigation bar.

   Again the layout and commands available are very similar to those available in Outlook 2013, so you’ll notice that using your Calendar from here, is just as easy and convenient as working in your standard Outlook application.

✅ Tip: If you have Exchange, you can even share your Calendar from the Outlook Web App. Click Share, select the user you want to share your calendar with and select the permissions available to the user. Confirm a Subject for the email, the user will receive and use the Calendar drop down to select which Calendar you want to share with the user. When you’re done, click Send.

People

Using the Outlook Web App you can add, edit and delete People as well as view available address books your organization may have set up.

1. Click People on your Navigation bar.

- Use the Search bar to look for contacts.

- Add new Contacts by clicking new.

- Use the options listed on the left to specify which of your Contacts are displayed, as well as how they are displayed. The right side of the screen displays more available details regarding the selected Contact.
Using SharePoint with Office

- You can also use available options to schedule meetings with Contacts, directly from SharePoint, or contact them via Email and Instant Messaging all from one location.

- You can also Edit and Delete Contacts from here, if you need to.

**More**

You can also access the Office Store and Office.com from your SharePoint site.

1. Click the More (...) button on your Navigation bar and select **Office store** to source apps for Office and SharePoint, or click **Office.com**, to access additional Office 365 learning support.

![Figure 6-7: SharePoint More options](image)
Synchronizing with Outlook

You don’t always have to log in to a SharePoint site to check on the status of a list or library. Instead, connect the list or library to Outlook.

Synchronize lists with Outlook

1. In SharePoint, open the list you want to synchronize with Outlook.
   Calendars, task lists, and contacts lists are probably the most common types of lists to synchronize.

2. If synching a list, click the List tab on the Ribbon and click the Connect to Outlook button in the Connect & Export group.
   A Microsoft Outlook dialog box appears, asking to verify that you want to connect the list to Outlook.
   🔄 Trap: You will only be able to synchronize with Outlook if you have the correct permissions and the SharePoint site is setup correctly.

   ✔ Tips
   ✓ If you are synchronizing a calendar with Outlook, click the Calendar tab on the Ribbon and click the Connect to Outlook button in the Connect & Export group.
   ✓ If you have the correct permissions and SharePoint is setup to work correctly and your Connect to Outlook button is still disabled check that your regional settings are correct.

   Depending on your security settings, additional dialog boxes may appear to allow SharePoint access to Outlook.

3. Click Yes.
   The connection takes a few moments to establish. When the connection is made, the SharePoint list appears in Outlook. Any changes made to the list are synchronized.

   ✔ Tip: Notice that the SharePoint list appears as a new item in the Folder Pane. You can switch back and forth between your default Outlook and SharePoint lists by selecting the list you want to view in the Folder Pane.

Copy events, tasks, and contacts

You can copy items between connected SharePoint lists and Outlook. Both SharePoint and Outlook are updated accordingly.

Exercise

- Exercise File: Calendar, “Meet the new Planner, Sally-Ann” event
- Exercise: Synchronize the SharePoint Calendar with Outlook
  Copy the “Meet the new Planner, Sally-Ann” event from the SharePoint calendar into the Outlook calendar.
1. In Outlook, open the list from which you want to copy an item.
   The list can be either a list that’s previously been connected to a SharePoint site or a list created in Outlook.

2. Click and drag the item from Outlook to the name of the list you want to copy the item to in SharePoint.
   ✓ **Tip:** When copying events, you can view both calendars at once so that events are copied to the correct dates. Select **Calendar** on the Navigation bar. Click the check box next to the two calendars you want to view – the SharePoint calendar and your calendar. When both calendars are displayed, click and drag events from one calendar to the other.

**Synchronize document libraries**
You can also access documents in a SharePoint document library through Outlook. When a document library is synchronized, its documents are available in Outlook. Changes to documents in SharePoint are also updated in Outlook, as long as Outlook is online.

1. In SharePoint, open the document library you want to synchronize with Outlook.

2. Click the **Library** tab on the Ribbon and click the **Connect to Outlook** button in the Connect & Export group.
   A Microsoft Outlook dialog box appears, asking to verify that you want to connect the document library to Outlook.
   ✓ **Tip:** Depending on your security settings, additional dialog boxes may appear to allow SharePoint access to Outlook.

3. Click **Yes**.
   The connection takes a few moments to establish. When the connection is made, the document library appears in Outlook.

4. Expand the **SharePoint Lists** folder and select the document library.
   The documents saved in the library appear. The documents are synchronized with SharePoint with Send/Receive.

---

**Exercise**

- **Exercise File:** Marketing Letters document library
- **Exercise:** Synchronize the Marketing Letters library with Outlook

---

**Figure 6-10:** The Microsoft Outlook dialog box
Saving a File to a SharePoint Library

If you are working in an Office program, such as Excel or Word, it's easy to save files to a SharePoint library. In fact, you can upload the file directly from the program in which you are working.

1. Open the file you want to save to SharePoint.
   
   You can save your document to SharePoint at any point during your editing.

2. Click the File tab on the Ribbon and select Save As.

   Options for saving the file appear.

   Make sure you’re in Other Web Locations.

   Available SharePoint libraries are displayed. Select the SharePoint library you wish to save the file to.

   Tip: If you do not see the library to which you want to save the file, click Browse.

   Tip: If this is the first time you are saving a file to a SharePoint library, the Windows Security dialog box appears. You need to enter your SharePoint user name and password before you can save the file to the SharePoint library.

5. Enter the name of the file in the File Name text box and click Save.

   The file is uploaded to SharePoint.

Exercise

- Exercise File: Marketing Letters document library
- Exercise: Create a document called "Marketing Agenda"

   Save this document in the Marketing Letters Documents library.

Figure 6-11: Saving a document to a SharePoint library in Word
Export Lists and Libraries to Excel

SharePoint is great for storing and sharing information, but it doesn’t allow you to analyze the information that it holds. When you need to analyze information, recruit Excel’s analytical power by exporting SharePoint’s lists and libraries to Excel.

1. Open the list or library you want to export to Excel.
   Information about each item or file will be exported to Excel.

2. Click the List or Library tab on the Ribbon and click the Export to Excel button in the Connect & Export group.
   The File Download dialog box appears, asking if you want to open or save the file.

3. Click Open to open the file immediately in Excel.
   A dialog box appears, asking if you want to enable the data connection that exports the list to Excel.
   ✓ Tip: You may also click Save to save the file to your computer.

4. Click Enable.

5. Another window will appear asking for your SharePoint logon details. Enter your SharePoint user name and password and click OK.
   By default, the data is shown in table format in a new workbook.

6. You can now use Excel’s features and controls to analyze the data from SharePoint.

Exercise

- Exercise File: Event Photographers list
- Exercise: Export the Event Photographers list to a new Excel workbook in Table format

Figure 6-12: Choose if you want to open or save the exported data in the File Download dialog box.

Figure 6-13: The list item data exported into a new Excel workbook
Using SharePoint with Office Review

Quiz Questions

1. Which of the following Outlook tools are not available via the Outlook Web App on SharePoint?
   A. Tasks
   B. Calendar
   C. Mail
   D. Notes

2. Being able to share your Calendar using the Outlook Web App, is one of its standard features. (True or False?)

3. Changes to list items and documents that are made from Outlook are not updated in SharePoint lists and libraries. (True or False?)

4. Which of the following is true?
   A. Lists can be connected to Outlook and exported to Excel
   B. Lists can be connected to Outlook and exported to Excel or Word
   C. Document Libraries can be connected to Outlook and exported to Excel
   D. Lists and Document Libraries can be connected to Outlook and exported to Excel

5. You cannot save a file to a SharePoint library without visiting the SharePoint site. (True or False?)

6. Only Lists can be exported to Excel. (True or False?)
Quiz Answers

1. D. Notes. Although Notes is available in Outlook, it is not one of the tools available in the Outlook Web App. (This is not to be confused with the Notes you can add regarding your People in the Outlook Web App.)

2. False. You can share your Calendar using the Outlook Web App, but in order to do so, you, or your organization must be using Microsoft Exchange. It is not a standard feature of the App.

3. False. Changes that are made to items and documents from lists and libraries in Outlook are updated in SharePoint. The updates happen with the Send/Receive command in Outlook.

4. D. Lists and Document Libraries can be connected to Outlook and exported to Excel.

5. False. You can upload a file to a SharePoint site from the program window.

6. False. Lists and Libraries can be exported to Excel.
Welcome to the age of mobile technology and convenience!

SharePoint already provides a great portal to access, create and store files and documents, so you can work with them whether you’re in Timbuktu, or at an airport coffee shop.

Now, you can even use SharePoint on your Mobile device. Most people walk around with their iPad or Smartphone these days, and Microsoft have really stepped up their game by making Office 365 optimized for touch on Mobile Devices.

In this chapter, we’re going to have a look at how you can use SharePoint from your preferred Mobile Device.
Mobile Browser View

Being able to use SharePoint on your preferred Mobile Device, is obviously a great advantage, especially since most people work on the run, using an iPad or their Smartphone.

Being able to access, create and store your files and documents, using your Mobile Device, will no doubt seem like a dream come true, for many “mobile” users.

The main difference between PC and Mobile views, is that the Mobile view is optimized for touch, making it super easy to use on your Smartphone or iPad

Trap: You will need a supported Mobile Device, in order to use this feature.

Supported Devices

Before we get into activating the Mobile Browser View, let’s first take a look at the list of supported devices.

Table 7-1: Supported Devices

<table>
<thead>
<tr>
<th>Mobile OS</th>
<th>Version</th>
<th>Browser</th>
<th>Smartphone</th>
<th>Tablet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows Phone</td>
<td>Windows 7.5 or later.</td>
<td>Internet Explorer Mobile</td>
<td>Supported</td>
<td>n/a</td>
</tr>
<tr>
<td>Windows</td>
<td>Windows 7 or later.</td>
<td>Internet Explorer</td>
<td>n/a</td>
<td>Supported</td>
</tr>
<tr>
<td>iOS</td>
<td>5.0, or later.*</td>
<td>Safari</td>
<td>Supported</td>
<td>Supported**</td>
</tr>
<tr>
<td>Android</td>
<td>4.0, or later.***</td>
<td>Android Browser</td>
<td>Supported</td>
<td>Supported</td>
</tr>
</tbody>
</table>

*iOS Video experience, requires 6.0 or later.

**Office Web Apps are supported on iPad 2 & 3 for version 6.0 or later. Limited editing and viewing is available on iPad 1, 2 & 3 with iOS 5.1.

***Android Video experience, requires 4.1 or later.

Activating Mobile Browser View

The process may differ from device to device, so the steps below, are guidelines based on activation for an iPad 2, iOS 6.0.

First you have to make sure that Mobile Browser View is enabled for your SharePoint site. If you don’t have permission to check this, or change the setting, you may have to request assistance from your support team.

1. On your SharePoint site, click the Settings button and select Site Settings.

Exercise

- Exercise File: None required.
- Exercise: Check if you have a supported device and if so, follow the lesson instructions and to look at the Mobile Browser View on your device.

Figure 7-1: SharePoint Menu in Mobile View on an iPad

Figure 7-2: Site Settings
SharePoint for Mobile Devices

2. Click **Manage site features** under **Site Actions**.

3. Scroll down and locate Mobile Browser View. Check that the feature is activated, if not, click the **Activate** button.

   Mobile Browser View is now active.

**Using Mobile View**

Once Mobile Browser View has been activated on SharePoint, you can switch the view on your Mobile Device, to Mobile View.

1. Click the **Settings** button and select **Mobile view**.

   ☑ **Tip:** Smartphones will use Mobile view by default, so you shouldn’t have to change the view on your Smartphone.

2. Use the Navigation button to access the SharePoint menu.

3. To return to PC view, click the **More actions (…)** button and select **switch to pc view**.

![Figure 7-3: More actions](image-url)
Setting Site Change Alerts

So you’re away from the office, but you’re busy and don’t have time to keep going onto SharePoint to check for that revised file you’re waiting for. No problem! Set an alert and SharePoint will send you a notification when something changes.

Tip: You have to be using PC View on your Mobile device, in order to set site alerts.

1. Open the List or Library, you want to set an alert for.
2. Click the respective List or Library tab.
3. In the Share & Track group, select Alert me and then select Set alert on this list, or Set alert on this library.
5. In the Users field, you can specify who should be notified.
6. Select a Delivery Method, for the alert. You can have the alert emailed or sent to your phone.
7. Select the Type of changes, you want the alert to be for.
8. Select further criteria for the Type of changes made.
9. Select when the notification should be sent, e.g. immediately, daily or weekly.
10. Once you’ve made your selections, click OK.

Removing Change Alerts

If you want to modify or delete Alerts, you have set, it’s easy to do.

1. Open the List or Library, containing the Alert you want to modify.
2. Click the respective List or Library tab.
3. In the Share & Track group, select Alert me and then select Manage My Alerts.
   - To Edit an Alert: click the Alert Title. Make the changes you require and click OK.
   - To Delete an Alert: select the appropriate checkboxes, and click Delete Selected Alerts. Click OK, to confirm.
SharePoint for Mobile Devices Review

Quiz Questions

1. You can use the Mobile Browser View, as long as you have a supported device. (True or False?)

2. Which Mobile Browser below, is NOT supported.
   A. Android Browser
   B. Safari
   C. Chrome
   D. Internet Explorer Mobile

3. SmartPhones use Mobile Browser View by default. (True or False?)

4. If you are using PC View on your Mobile Device, you will not be able to set Site Change Alerts from your Mobile Device. (True or False?)

5. Choose the correct set of instructions below, to modify a Site Change Alert:
   A. In the Share & Track Group, select Alert me, select Manage My Alerts and then select the checkbox for the Alert you want to modify and click Modify selected Alert.
   B. In the Alerts Group, select Alert me, select Manage My Alerts and then click the Alert Title.
   C. In the Share & Track Group, select Alert me, select Manage My Alerts and then click the Alert Title.
   D. In the Alerts Group, select Alert me, select Manage My Alerts and then select the checkbox for the Alert you want to modify and click Modify selected Alert.
Quiz Answers

1. False. You will only be able to use the Mobile Browser View feature, if you have a supported device AND Mobile Browser View has been activated on your SharePoint Site.

2. C. Chrome. Google Chrome, is not listed as one of the supported Mobile Browsers, for this SharePoint feature.

3. True. If the feature is activated on SharePoint, and you have a supported device, you should see SharePoint in the Mobile Browser View by default.

4. False. If you want to set Site Change Alerts from your Mobile Device, you MUST be using PC View.

5. C. In the Share & Track Group, select Alert me, select Manage My Alerts and then click the Alert Title. This will open the Edit window, where you can make any necessary changes to the Alert.
Sites settings can be customized and changed once they are created. This chapter covers some common site settings, such as site appearance.

It also covers more advanced settings, such as assigning permissions to site users and using Web Parts.

Note: Only Site Owners (Full Control permissions) can make the site changes discussed in these lessons.
Working with Site Settings

Each site can be customized and changed after it is created. Whether you need to change who can access the site, how the site looks, or what colors appear on the site, all of these options can be found under Site Settings. You can even delete a site if necessary.

1. Click the Settings button and select Site Settings. The Site Settings page appears.
2. Click the setting you wish to change. A form appears in which you can change the setting options.
3. Change the setting options as necessary. Refer to the Table 8-1: Site Settings, for more information about each setting.
4. Click OK. The site changes to reflect the new site settings.

Table 8-1: Site Settings

<table>
<thead>
<tr>
<th>Users and Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>People and groups</td>
</tr>
<tr>
<td>Site permissions</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Look and Feel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title, description, and icon</td>
</tr>
<tr>
<td>Quick Launch</td>
</tr>
<tr>
<td>Top link bar</td>
</tr>
<tr>
<td>Tree view</td>
</tr>
<tr>
<td>Site theme</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Galleries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site columns</td>
</tr>
<tr>
<td>Site content types</td>
</tr>
<tr>
<td>Web parts</td>
</tr>
<tr>
<td>List templates</td>
</tr>
</tbody>
</table>

Exercise

- **Exercise File:** None required
- **Exercise:** Understand how site settings can be used to control a site in SharePoint
### Managing Sites

#### Table 8-1: Site Settings

<table>
<thead>
<tr>
<th>Page</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Master pages</strong></td>
<td>Upload and store master pages here. Master pages are used as templates for sites and pages.</td>
</tr>
<tr>
<td><strong>Themes</strong></td>
<td>Manage or create site themes.</td>
</tr>
<tr>
<td><strong>Solutions</strong></td>
<td>Control and manage user-generated content, such as user-generated site templates.</td>
</tr>
</tbody>
</table>

#### Site Actions

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage site features</td>
<td>Control which features are available on a site.</td>
</tr>
<tr>
<td>Save site as template</td>
<td>Use the design of the current team site Home page to create a template. This template can then be used to create new Web sites.</td>
</tr>
<tr>
<td>Site Web Analytics reports</td>
<td>View who is accessing the site and how the site is being used. (The site administrator must enable services to make this feature available.)</td>
</tr>
<tr>
<td>Reset to site definition</td>
<td>This feature wipes the slate clean for a page or an entire site. Any changes you have made to the page (added text, modified Web Parts, etc.) are removed, so the page or site appears as it did when it was first created. This action cannot be undone, and there are no backup copies.</td>
</tr>
<tr>
<td>Delete this site</td>
<td>Use this setting to delete the site and its subsites. This action cannot be undone, and the site is not saved in the Recycle Bin.</td>
</tr>
</tbody>
</table>

#### Site Administration

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional settings</td>
<td>Specify site settings so they are consistent with your region, such as location, time zone, and time format.</td>
</tr>
<tr>
<td>Language settings</td>
<td>Specify the default language as well as any alternate languages the site should support.</td>
</tr>
<tr>
<td>Site libraries and lists</td>
<td>Customize the design of lists, libraries, discussion boards, and surveys on the site.</td>
</tr>
<tr>
<td>User alerts</td>
<td>Manage the alerts for users on the site. Users can manage their own sites, but site owners can also manage the alerts for all users in the site with this setting.</td>
</tr>
<tr>
<td>RSS</td>
<td>Enable or disable RSS feeds for the site.</td>
</tr>
<tr>
<td>Search and offline availability</td>
<td>Choose whether the site should appear in search results. (Users without permission to view the site won’t be able to view the site either way.) Also specify if offline users should be able to download items from the site.</td>
</tr>
<tr>
<td>Sites</td>
<td>Displays the subsites the current user can access for the site. New sites can also be created from this setting.</td>
</tr>
<tr>
<td>Workflow Settings</td>
<td>Create and manage any workflows for the site. Also edit workflow settings for the site.</td>
</tr>
</tbody>
</table>
Customizing Site Appearance

As a site owner, you can control the way a site looks (its colors and themes) and how it feels (how people navigate in the site).

Tips

✓ You need the correct permissions to change these items in a site. You need to be either a member of the Site Owner group (with Full Control permission level) or part of a group with the Design permission level.

Customize site theme

Make your site stand out from others by applying a different site theme. A site theme determines the colors and fonts used throughout the site. You can do this to match the mood or attitude of your team to your team’s site, or to match your company’s or site’s logo.

1. Click the Settings button and select Site Settings from the list.

   The Site Settings page appears.

2. Click the Change the Look link under the Look and Feel section.

   A list of the available themes are displayed.

3. Once you’ve selected a theme, a preview of the colors and fonts as well as a background picture will be shown on the left hand side. You can edit any of these options to better suit your requirements.

4. Click Try it out to test the theme on your site. A preview of the new theme will open up. On the top right hand side you will be given 2 options:

   If you wish to keep the chosen theme, select the Yes, keep it option. This will apply the new theme to your site. (Subsites will not be affected.)

   If you’d like to try another theme, select the No, not quite there yet option. This will take you back to the available themes.

Customize site navigation

You can control the site navigation by customizing the Top link bar and the Quick Launch bar.

1. Click the Settings button and select Site Settings from the list.

   The Site Settings page appears.
2. Click the **Quick launch** or **Top link bar** link under the Look and Feel section.

The Quick Launch or Top Link Bar page appears, depending on what you selected.

3. Select the option(s) you want to use to control navigation and click **OK**.

The table below, **Table 7-2: Navigation Settings**, explains the options available on both of these settings pages.

---

**Table 8-2: Navigation Settings**

<table>
<thead>
<tr>
<th>Quick launch</th>
<th>Top link bar</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Navigation Link</strong></td>
<td><strong>New Navigation Link</strong></td>
</tr>
<tr>
<td><strong>New Heading</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Change Order</strong></td>
<td><strong>Change Order</strong></td>
</tr>
<tr>
<td><strong>New Navigation Link</strong></td>
<td><strong>New Navigation Link</strong></td>
</tr>
<tr>
<td><strong>Change Order</strong></td>
<td><strong>Change Order</strong></td>
</tr>
</tbody>
</table>
Working with Groups

In most cases, the three default groups that are created with a site—Owners, Members, and Visitors—are all that are needed for managing the users that have access to the site. But you can also create new groups and change the settings for existing groups. This lesson discusses some of the most common ways to work with site groups.

Create a new group

Site owners can add new groups for managing users on a site.

1. Click the Settings button and select Site Settings.
   The Site Settings page appears.

2. Click People and groups under the Users and Permissions section.
   The default security group appears.

3. Click Groups in the Quick Launch bar.
   A list of all site groups appears.

4. Click the New button list arrow on the taskbar and select New Group.
   The Create Group page appears.

5. Enter the group settings.
   See Table 8-3: Group Settings, for more information about the settings available on this page.

6. Click Create.
   The group is created with the selected settings.

Change group settings

You can change the settings for an existing group.

1. Click the Settings button and select Site Settings.
   The Site Settings page appears.

2. Click People and groups under the Users and Permissions section.
   The site groups are listed in the Quick Launch bar.

---

Table 8-3: Group Settings

<table>
<thead>
<tr>
<th>Name and About Me Description</th>
<th>This information identifies the group.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>Designate the group or user that can change the group, such as by adding users or deleting the group. The owner can either be an entire group or a single user.</td>
</tr>
<tr>
<td>Group Settings</td>
<td>Choose who can view members of the group (Group Members or Everyone) and who has permission to add or remove members from the group (Group Owners or Group Members).</td>
</tr>
<tr>
<td>Membership Requests</td>
<td>Choose whether you want to allow users to request to join or leave the group. If requests are accepted, choose how to handle requests.</td>
</tr>
</tbody>
</table>
3. Click the name of the group you want to change in the Quick Launch bar.
   The users that have been added to the group are listed.
   ✔ Tip: Click the More link under Groups in the Quick Launch bar to view a list of all groups.

4. Click the Settings button list arrow on the taskbar and select Group Settings from the list.
   The Change Group Settings page appears.
   🚨 Trap: You can only change settings of groups that list you as the owner.

5. Change the group settings as necessary.
   See the table on the previous page, Table 8-3: Group Settings, for more information about the group settings available.

6. Click OK.
   The changes are applied to the group.

Delete a group

1. Click the Settings button and select Site Settings.
   The Site Settings page appears.

2. Click People and groups under the Users and Permissions section.
   The default security group appears.

3. Click Groups on the Quick Launch bar.
   A list of all site groups appears.

4. Click the Edit button next to the group which you want to delete.
   The Change Group Settings page appears.

5. Click the Delete button.
   A dialog box appears, confirming that you want to delete the group.

6. Click OK.
   The group is deleted.

Figure 8-5: The Change Group Settings page
Adding a User to a Group

To give a user access to a site, add them to one of the site’s groups. The user will then have access to the site in accordance with the group’s permission level. For example, if a user is added to the Site Visitor group, they can read items and pages in the site; however they can’t change or add anything.

Tips
✓ Only the group owner can add users to a group.

1. Click the Settings button and select Site Settings from the list.
   The Site Settings page appears.

2. Click the People and groups link under the Users and Permissions section.
   The People and Groups screen appears. Members of the selected group are listed.
   The other groups that are available in the site are listed under Groups in the Quick Launch.

3. Select the group to which you would like to add the user in the Quick Launch bar.
   The group appears, and all the group members are displayed.
   Tip: If the group does not appear, click the More link under Groups in the Quick Launch for a complete list of site groups.

4. Click the New button list arrow on the taskbar and select Add Users from the list.
   Trap: If the New button does not appear, then you cannot add a new member to the group. Contact the group owner to add a member to the group.

5. The Share Dialogue box appears.
   Enter the user name, distribution group name, or email address of the user(s) you want to add.
   Separate entries with a semicolon.

6. You can add as many users as necessary and you can add a personal message to the invitation(s).

7. When you’re done, select Share.
Managing Sites

Tips

- Adding users to groups is recommended because the groups can give users in the group access to other sites.

- To remove a user from a group, view the group and click the check box next to the user’s name. Click the Actions button list arrow on the taskbar and select Remove Users from Group from the list.
Working with Web Parts

Web Parts are an easy way to customize and work with pages in SharePoint. Web Parts are like built-in pieces of SharePoint pages that you can piece together to make a SharePoint page. You can create pages from Web Parts and change how Web Parts work in an existing page.

Add Web Parts to pages

You can add information to a page by adding more Web Parts. This is most effective in pages that already use Web Parts.

1. Open the page to which you want to add a Web Part.

2. Click the Settings menu and select Edit Page from the list.

The page appears in Edit mode.

Other Ways to Edit a Page:
Click the Page tab on the Ribbon and click the Edit Page button in the Edit group.

3. Select the Add Web Part link (you can choose to add the new part to either the left or right side of the page).

A list of Web Parts appears below the Ribbon. There are several categories of Web Parts from which to choose.

4. Select the type of Web Part you want to add under the Categories column.

Now you can select the specific Web Part you want to add.

5. Select the Web Part you want to add to the page under the Web Parts column and click Add.

A preview of the Web Part is added to the page. You can now edit the Web Part to change how it appears, if necessary.

6. When you are finished editing the page, click the Stop Editing button on the Ribbon. You will now see the Web Part(s) are added to the page.

Exercise

- Exercise File: nst_logo.jpg
- Exercise: Add the Calendar Web Part to the Home page
  Insert the nst_logo.jpg
Site owners can change how pages look by modifying and editing the Web Parts that make up the page.

1. Open the page you want to change.
2. Click the **Settings** button and select **Edit Page** from the list.
   The page appears in Edit mode. Any Web Parts that are used in the page are visible here.

**Other Ways to Edit a Page:**
Click the **Page** tab on the Ribbon and click the **Edit Page** button in the Edit group.

3. Click the check box next to the Web Part you want to edit. (The check box is not visible by default, mouse over the top right hand corner of the relevant Web Part to find it.)
   The Web Part is selected.
Managing Sites

4. Click the list arrow next to the check box and then select Edit Web Part from the list.

   A task pane appears along the right side of the page with options for modifying the Web Part. The options that are available in the task pane change depending on the Web Part being edited.

   **Other Ways to Edit a Web Part:**

   Once the Web Part is selected, select the **Web Part tab** on the Ribbon and then select **Web Part Properties** from the Properties group.

5. Change the Web Part settings as necessary and click **OK**.

   The task pane closes, and the changes are previewed in Edit mode.

6. When you are finished editing the page, click the **Stop Editing** button on the Ribbon in the Edit group.

   The page is displayed with the changes made to the Web Part.

Figure 8-11: Selecting to edit the Web Part Properties of the Calendar
Managing Sites Review

Quiz Questions

1. Which of these settings are not available on the Site Settings page?
   A. Home page logo
   B. Title, description, and icon
   C. People and groups
   D. Delete this site

2. The site theme changes the colors used in the site. (True or False?)

3. What are the three default site groups?
   A. Managers, Users, Visitors
   B. Owners, Managers, Guests
   C. Owners, Members, Visitors
   D. Administrators, Members, and Guests

4. Who can access a SharePoint site?
   A. Anyone that is part of the organization’s e-mail system.
   B. Users that go to the site and register for an account.
   C. The organization’s managers and stakeholders.
   D. Users that have been added to the site’s groups.

5. You can change the appearance of a page by modifying its Web Parts. (True or False?)
Quiz Answers

1. A. Home page logo is not a site setting.
2. True. The site theme changes the colors that are used in the site.
3. C. Owners, Members, and Visitors are the three default site groups.
4. D. Users who have been added to a site’s groups have permission to view the site.
5. True. You can change the appearance of a page by modifying its Web Parts.