



UNIVERSITY *of*
NEW ORLEANS

Microsoft Windows SharePoint Services

SITE ADMIN USER TRAINING

Introduction

What is Microsoft Windows SharePoint Services?

Windows SharePoint Services (referred to generically as SharePoint) is a tool to help organizations, teams and business units to be more effective by connecting people and information. It provides the infrastructure for collaboration and a foundation for building and creating Web Sites to share information with other users; however, you do not need to have expertise in designing web sites to get started.

SharePoint provides places to capture and share ideas, information, communication and documents. The sites facilitate team participation. The document libraries allow for easy checking in and checking out of documents and version control.

A SharePoint Site can have many **subsites**. Similar to storing file in folders, you can store them within SharePoint sites. However, SharePoint takes file storage to a new level by providing communities for team collaboration. You can create and use a SharePoint site for any purpose. For example, you can build a site to serve as a primary web site for a team or create a site to facilitate a meeting. A typical SharePoint site may include information such as shared document libraries, contacts, calendars, task lists, discussions, etc. The sites can be easily searched and users can be alerted when documents have been changed or new ones added.

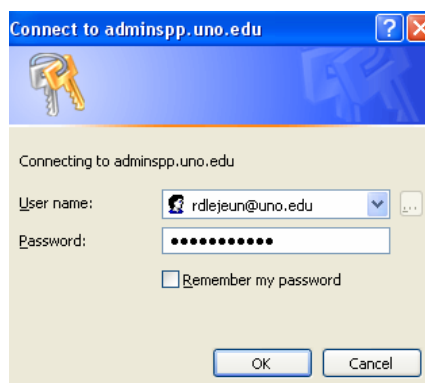
By the end of this workshop, you should be able to:

- Create and Manage Sites
- Customize Sites
- Create and Manage Lists, Libraries and Views
- Manage User and Group Permissions
- Administer Sites

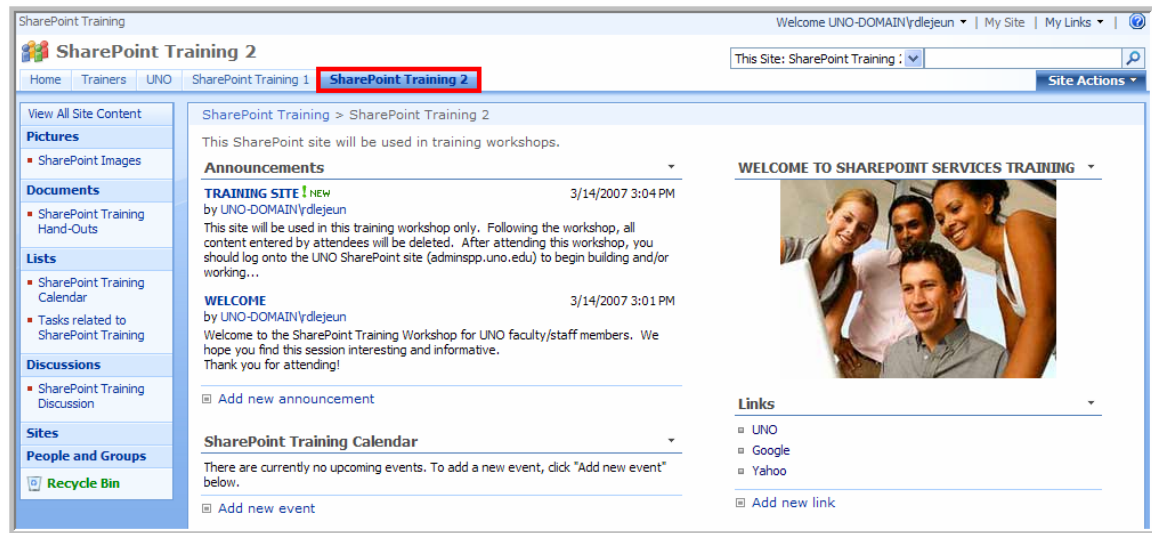
FAQ's:

- What are the benefits of using SharePoint?
 - 1. Improve team productivity:** Connect people with the information and resources they need. Users can create team workspaces, coordinate calendars, organize documents, and receive important notifications and updates through communication features including announcements and alerts.
 - 2. Easily manage documents and help ensure integrity of content:** With enhanced document management capabilities the ability to view revisions to documents and restore to previous versions, SharePoint can help ensure the integrity of documents stored on team sites.
 - 3. Get users up to speed quickly:** User interface includes enhanced views and menus that simplify navigation within SharePoint sites. Familiarity with the Microsoft product line, makes it easy for users to get up to speed quickly.
 - 4. Take file sharing to a new level:** SharePoint supplies workspaces with document storage and retrieval features, including check-in/check-out functionality, version history and customizable views.
 - 5. Provide a cost-effective foundation for building Web-based applications:** SharePoint provides a common framework for document management and collaboration from which flexible Web applications and Internet sites, specific to the needs of the organization, can be built.
 - 6. Search capabilities:** SharePoint provides unlimited resources for searching, including allowing the user to input a “friendly” name.
- How do I access the University's SharePoint site?

The URL is: <http://adminspp.uno.edu>
You will be prompted to enter your LAN username (including @uno.edu) and password.



- **For the purposes of this training**, we will access the training SharePoint site. In your browser address box, type <http://devspp.uno.edu>. If prompted, enter your LAN username and password. The training home page should appear; go to the **SharePoint Training 2** tab on the top link bar.



CREATING AND MANAGING SITES AND WEB PAGES

Overview of Sites and Site Templates:

A **site** is a group of related web pages where your team/department/college can work on projects, conduct meetings and share information. You can use subsites to divide site content into separate manageable sites. For example, your department may want separate sites for each division or team.

Top-level sites can have multiple subsites, and subsites can have multiple subsites. In other words, you can use any site as a single container or create as many subsites as necessary to make the data easier to find and/or manage. The entire structure of a top-level web site and all of its subsites is called a **site collection**.

As the site administrator, you can create a new subsite within the existing site structure, as needed. By default, a new subsite uses the URL of its parent site as the first part of its URL. A subsite can inherit permissions of the parent site or you can specify unique permissions.

When creating a site, SharePoint provides a number of default site templates and workspaces to fit your needs. Here is a detailed description of each:

TYPES OF DEFAULT SITE TEMPLATES:

a.) Team site: Select this site template when you want to create a site that teams can use to create, organize, and share information. The template includes a document library and basic lists such as **Announcements**, **Calendar**, **Contacts**, and **Links**.

b.) Blank site: Select this site template when you want to create a site with a blank home page that you plan to customize. You can use a Web design program that is compatible with Windows SharePoint Services, such as Microsoft Office SharePoint Designer 2007, to add interactive lists or any other features.

c.) Document Workspace site: Select this site template when you want to create a site that helps your team members to work together on documents. This template provides a document library for storing the primary document and supporting files, a **Tasks** list for assigning to-do items, and a **Links** list for resources related to the document.

d.) Wiki site: Select this site template when you want to create a site where users can quickly and easily add, edit, and link Web pages.

e.) Blog site Select this site template when you want to create a site where users can post information and allow others to comment on it.

f.) Basic Meeting Workspace site Select this site template when you want to create a site that helps you to plan, organize, and track your meeting with the rest of your team. The template includes following lists: **Objectives**, **Attendees**, **Agenda**, and **Document Library**.

g.) Blank Meeting Workspace site Select this site template when you want to create a blank Meeting Workspace site that you can customize, based on your requirements.

h.) Decision Meeting Workspace site Select this site template when you want to create a site that is ideal for reviewing documents and recording any decisions that are reached at the meeting. The template includes the following lists: **Objectives**, **Attendees**, **Agenda**, **Document Library**, **Tasks**, and **Decisions**.

i.) Social Meeting Workspace site Select this site template when you want to create a site that helps you to plan and coordinate social occasions. The template includes the following lists: **Attendees**, **Directions**, **Things To Bring**, **Discussions**, and **Picture Library**.

j.) Multipage Meeting Workspace site Select this site template when you want to create a site that provides all the basics to plan, organize, and track your meeting with multiple pages. The template contains the following lists: **Objectives**, **Attendees**, and **Agenda** in addition to two blank pages for you to customize based on your requirements.

Planning the structure of site collections and sites:

Determining the goals and objectives of a Web site are important factors to consider when developing a site. Careful planning will ensure that the site is easy to use and manage.

To begin planning your site structure:

- Determine who will use the site
- Determine the content of the site
- Plan the navigation structure
- Determine access to sites and site content

Determine who will use the site: deciding what kind of site to create depends on the specific needs of each department, the intended scope and use of the site. Your team can have its own site and you can create a separate subsite for every project on which your team is working.

Determine the content of the site: decide what information will be stored on the site and the best location or method in which to store it, such as a site or workspace (refer back to the descriptions of each on page 5).

Plan the navigation structure: the navigation consists of links that users can use to access the major sections and pages on a site. The following site navigation elements are available:

SITE NAVIGATION ELEMENT

DESCRIPTION

View All Site Content

This navigation element appears as a link on the left-hand side of a page, directly above the Quick Launch. You cannot customize or disable this link. When you click the link, the All Site Content page appears, providing a list of links to all lists, libraries, discussion boards, surveys and the recycle bin for a site.

Quick Launch

This is a customizable navigation element that displays section headings and links to different areas of your site. By default, the Quick Launch appears on most pages directly

below the View All Site Content link.

Tree View

This element has the same look and feel as Windows Explorer. Branches of the tree that contain other objects can be expanded to view those objects. The tree view is not configurable and is not displayed by default. When displayed, the tree view appears directly under the Quick Launch.

Top Link Bar

This is a customizable navigation element that appears as one or more hyperlinked tabs across the top of all pages on a site.

Breadcrumbs

This element provides hyperlinks which show the steps you took to get to your current location. They can also be used to return to a specific location on a site.

Determine access to sites and site content: when setting up a site, you need a way to specify who has access to it. For a typical site, you may want everyone who comes to the site to be able to view your content, but you don't want them to be able to change the content. You should only have a few users controlling the structure of the site, but many more users should be able to add content or participate in group calendars or discussions. Permissions can set at the top-level site, subsite, and list and library levels. (For more on permissions, refer to the Managing Users and Groups section.)

Creating Sites and Workspaces:

First, decide which best fits your needs (refer the page 5 for detailed descriptions of each). Creating a site or workspace is exactly the same, with the exception of the **template** selected.

Creating a subsite under an existing site:

EXERCISE:

1. Select **Site Actions**
2. **Create**
3. **Sites and Workspaces**



1. On the **New SharePoint Site** page, enter the following:
 - a) **Title:** the title is required and appears at the top of the web page and in the navigational bars to help users find and open the site.
 - b) **Description:** the description is optional and appears at the top of the web page to help users understand the purpose of your site.
 - c) **URL:** the first part of the URL is inherited from the parent site and is provided for you. To avoid potential problems, use lower case letters, no spaces and no special characters in the URL for your site.
 - d) **Template Selection:** use the **Collaboration** or **Meetings** tab to select the desired template.

- e) In the **Permissions** section, select whether you want to provide access to the same users who have access to this parent site or to a unique set of users. If you select **Use Unique Permissions**, you can set up permissions later after you finish entering information on the current page. (Will cover in Managing Users and Groups Section.)
- f) In the **Navigation** section, you will need to answer two important questions:
1. Do you want to display this site on the quick launch bar?
 2. Do you want to display this site on the top link bar?
- g) Click **Create**.

SharePoint Training 2
SharePoint Training 2 > Create a New SharePoint Site
New SharePoint Site

Use this page to create a new site or subsite under this SharePoint site. You can specify a title, Web site address, and access permissions.

Title and Description
Type a title and description for your new site. The title will be displayed on each page in the site.

Web Site Address
Users can navigate to your site by typing the Web site address (URL) into their browser. You can enter the last part of the address. You should keep it short and easy to remember.
For example, http://sharepoint-uno.edu/SPTrainingContainer

Template Selection
A site template is a site that contains content, design, and structure information. It provides a document library, and lists for managing announcements, calendar items, tasks, and discussions.

Permissions
You can give permission to access your new site to the same users who have access to the parent site, or you can give permission to a unique set of users.
Note: If you select the same permissions as parent site, one set of user permissions is inherited from the parent site. Consequently, you cannot change user permissions on your new site unless you are an administrator of the parent site.

Navigation
Specify whether this site appears in the Quick Launch and the top link bar of the parent site.

Navigation Subnavigation
Specify whether this site shares the same top link bar as the parent. This setting may also determine the starting element of the breadcrumb.

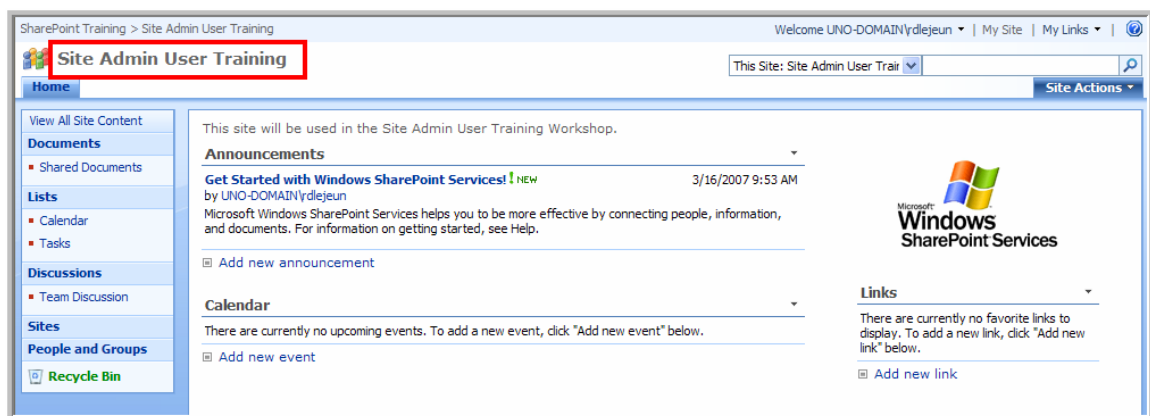
Web Site Address
URL name: http://sharepoint-uno.edu/SPTraining2

Permissions
Use Permissions:
☒ Use same permissions as parent site
☐ Use unique permissions

Navigation
Display this site on the Quick Launch of the parent site?
☒ Yes ☐ No
Use the top link bar from the parent site?
☒ Yes ☐ No

Create Cancel

SharePoint will open the subsite you have created.



Creating Web Pages:

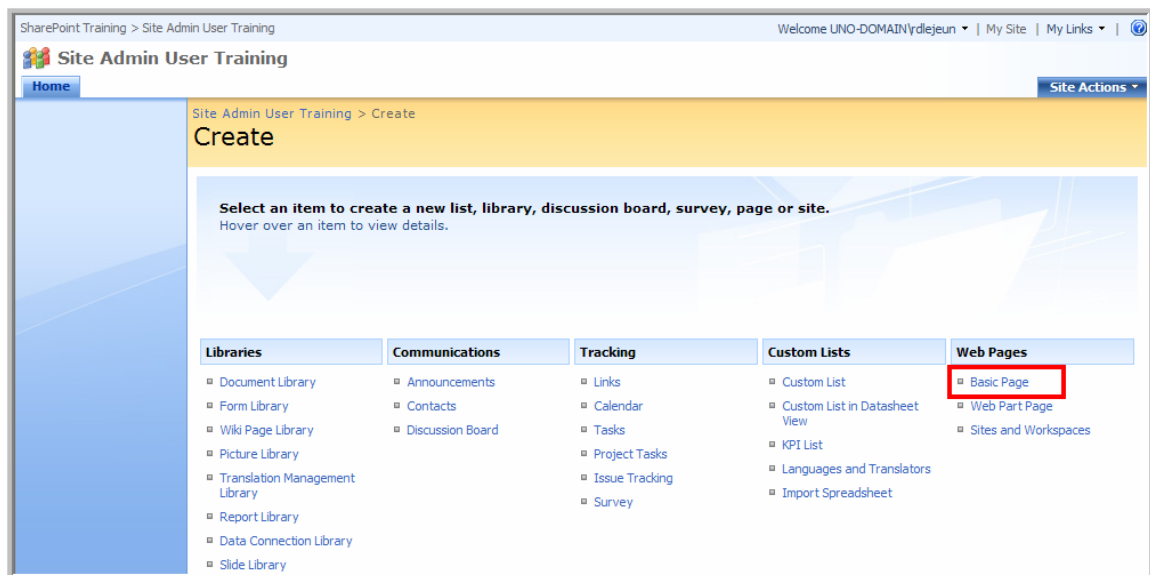
What is a web page? A web page is a file saved in HTML format. A web page can display lists of information, enabling team members to organize the information any way they want, such as by subject, due date or author. For example, you can do the following:

- Filter the content to see only the set of information that applies to you
- Hide the information that doesn't interest you
- Change the order in which the information is listed
- Set up customized views to make it easy for your team members to focus quickly on pertinent information

Creating a web page:

EXERCISE:

1. Select **Site Actions**
2. **Create**
3. Under Web Pages, select **Basic Page** (to add a simple web page to your site).



4. Type the **Name** of you basic web page and click **Create**.

SharePoint Training > Site Admin User Training

Welcome UNO-DOMAIN\ydejeun | My Site | My Links

Site Admin User Training

Home

Site Admin User Training > Create > New Basic Page

New Basic Page

Use this page to create a new basic page on your site. You can add any content you want to the new page after you create it.

Name
Type a file name for your basic page. The file name appears in headings and links throughout the site.

Name:
☐ Overwrite if file already exists?

Save Location
Select the document library where you want the basic page to be saved.

Document Library

5. Your basic web page has been created.

SharePoint Training > Site Admin User Training

Welcome UNO-DOMAIN\ydejeun | My Site | My Links

Site Admin User Training

Home

This Site: Site Admin User Train

Site Admin User Training > Shared Documents > Site Admin Training Team

This site will be used in the Site Admin User Training Workshop.

6. Click **Edit Content** to enter dialog in the box provided. When you have finished entering text, click **Save**.

Rich Text Editor -- Webpage Dialog

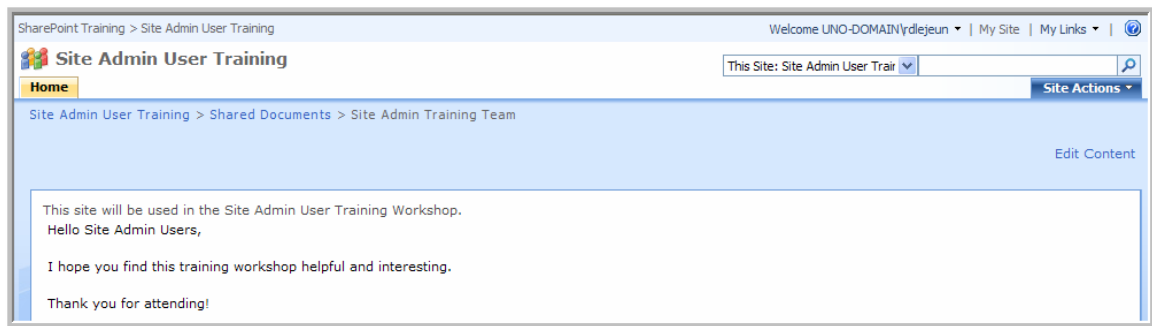
http://devspp.uno.edu/SPtraining2/siteadminusertraining/_layouts/htmledit.aspx

Hello Site Admin Users,

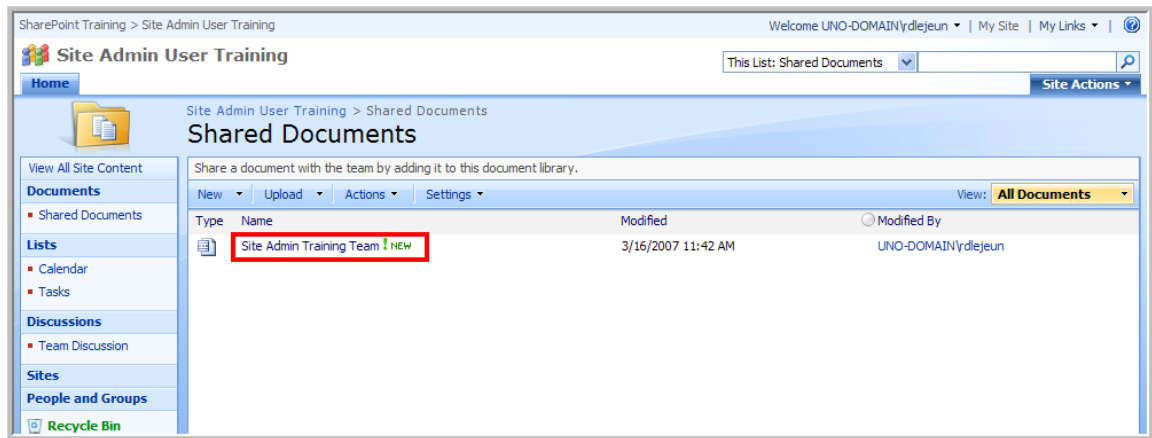
I hope you find this training workshop helpful and interesting.

Thank you for attending!

7. The information/text entered is now displayed on your basic web page.



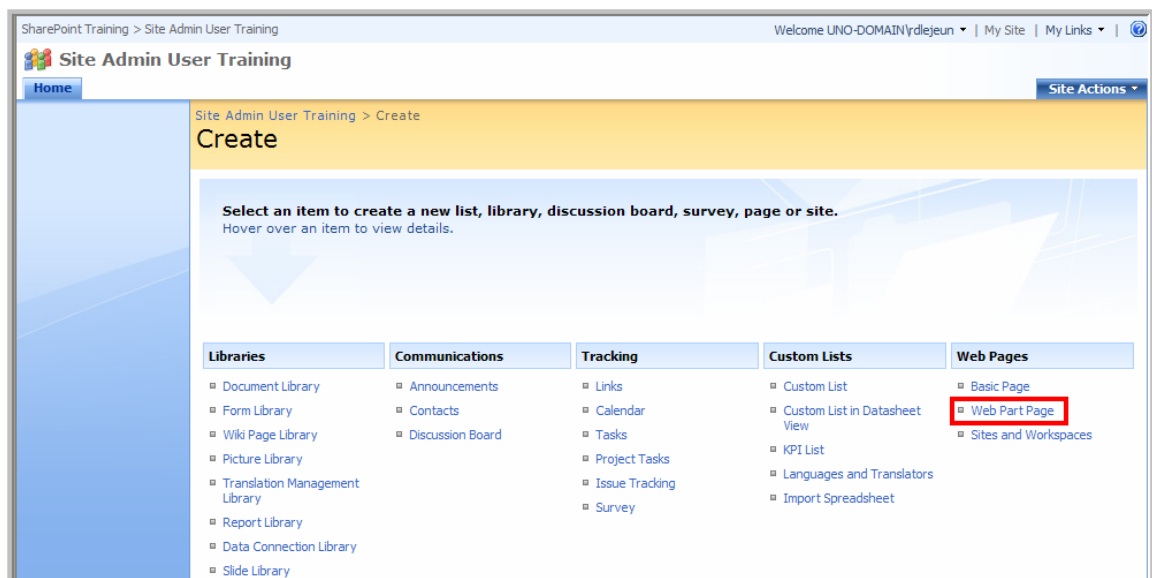
8. The basic web page is stored under the Shared Documents web part on your subsite.



Creating a Web Part Page:

EXERCISE:

1. Select **Site Actions**
2. **Create**
3. Under Web Pages, select **Web Part Page** (to build a site which displays one or more web parts).



4. On the **New Web Part Page**, enter the name, select the desired layout of the page, note that the page will be stored under the Shared Documents web part on your subsite and click **Create**.

SharePoint Training > Site Admin User Training

Welcome UNO-DOMAIN\ydejeun | My Site | My Links

Site Admin User Training

Home

Site Actions

Site Admin User Training > Create > New Web Part Page

New Web Part Page

A Web Part Page is a collection of Web Parts that combines list data, timely information, or useful graphics into a dynamic Web page. The layout and content of a Web Part Page can be set for all users and optionally personalized by each user.

Name
Type a file name for your Web Part Page. The file name appears in headings and links throughout the site.

Name: .aspx
☐ Overwrite if file already exists?

Layout
Select a layout template to arrange Web Parts in zones on the page. Multiple Web Parts can be added to each zone. Specific zones allow Web Parts to be stacked in a horizontal or vertical direction, which is illustrated by differently colored Web Parts. If you do not add a Web Part to a zone, the zone collapses (unless it has a fixed width) and the other zones expand to fill unused space when you browse the Web Part Page.

Choose a Layout Template:

- Full Page, Vertical
- Header, Left Column, Body
- Header, Right Column, Body
- Header, Footer, 3 Columns
- Header, Footer, 2 Columns, 4 Rows
- Header, Footer, 4 Columns, Top Row
- Left Column, Header, Footer, Top Row, 3 Columns
- Right Column, Header, Footer, Top Row, 3 Columns

Save Location
Select the document library where you want the Web Part Page to be saved.

Document Library
Shared Documents

Create Cancel

5. The **Web Part Page** will be displayed. Note: you are in **edit** mode. Click on **Add a Web Part** for a detailed listing of all the web parts provided by SharePoint.

SharePoint Training > Site Admin User Training

Welcome UNO-DOMAIN\ydejeun | My Site | My Links

Site Admin User Training

Home

This Site: Site Admin User Train

Site Actions

Version: You are editing the Shared Version of this page

Exit Edit Mode

Site Admin User Training > Shared Documents > Site Admin Web Par

Site Admin Web Par

Edit Title Bar Properties

This site will be used in the Site Admin User Training Workshop.

Header

Add a Web Part

Left Column

Add a Web Part

Middle Column

Add a Web Part

Right Column

Add a Web Part

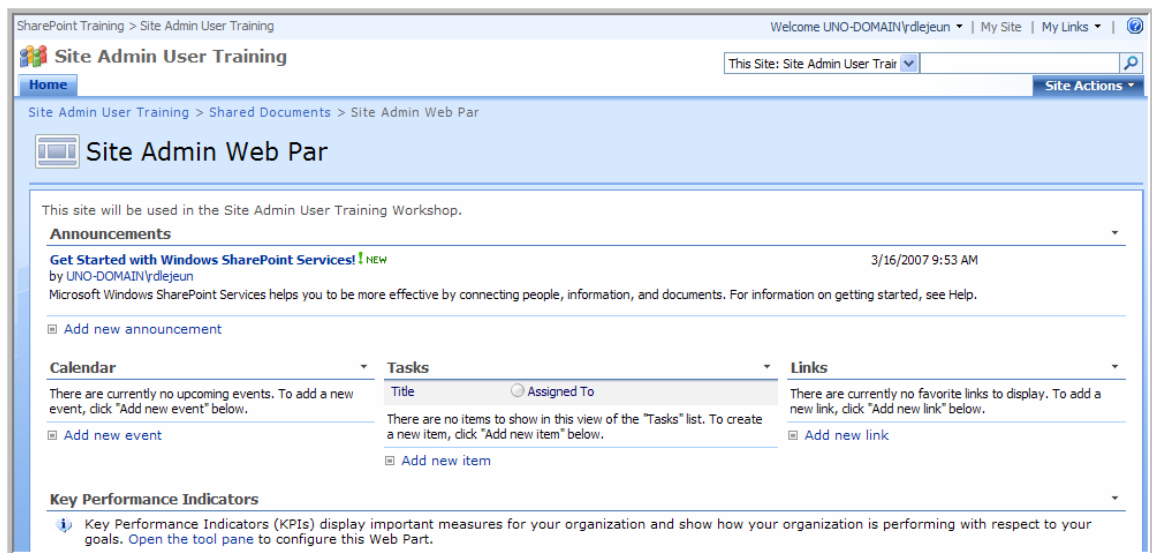
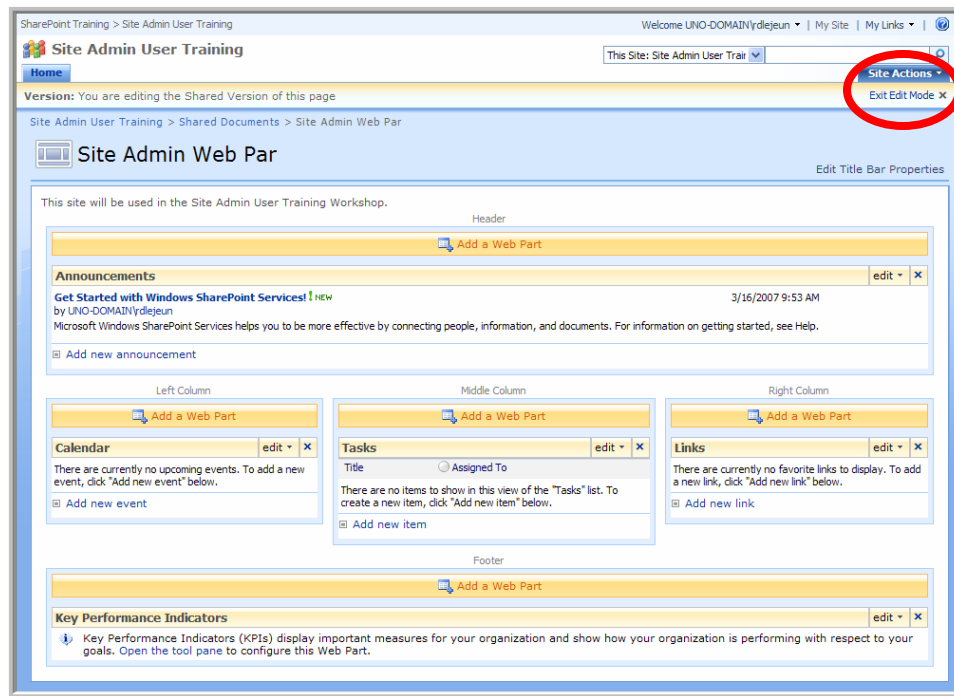
Footer

Add a Web Part

6. Select from the list provided to add web parts to your page. Depending on the layout of the web part page, place the necessary web parts under the desired column location (i.e., header, left, middle, right column or footer).



7. After selecting the wanted web parts, click **Exit Edit Mode** at the top of the page. The Web Part Page will be displayed.



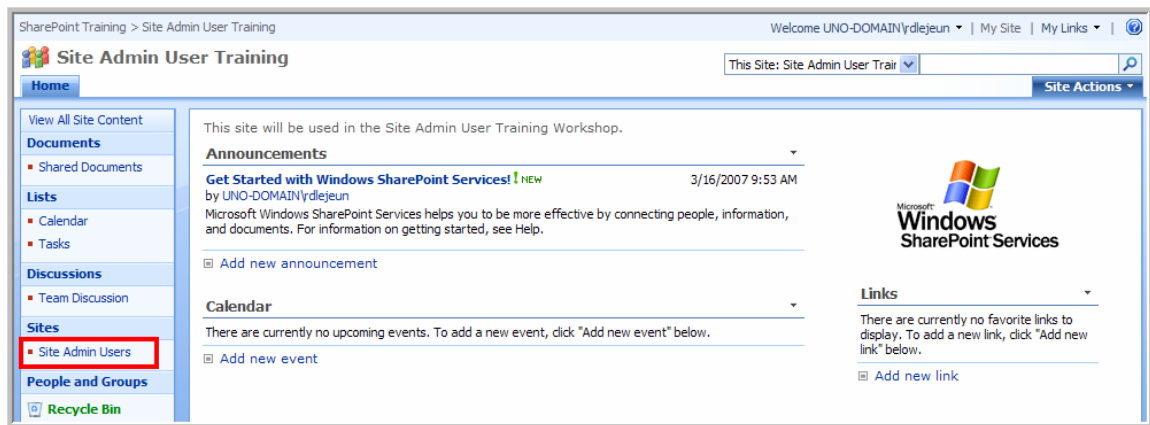
Deleting Sites and Workspaces:

When you delete a site or workspace, you permanently destroy all content and user information, including:

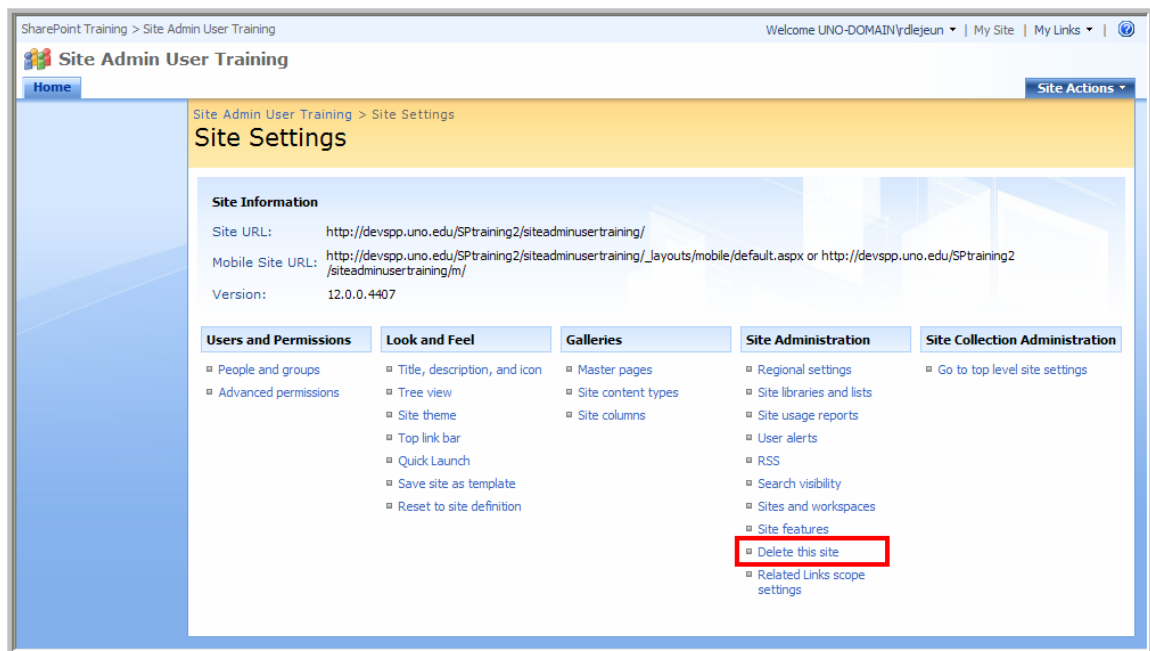
- Documents and document libraries
- Lists and data, including discussions, announcements and calendar
- Web site settings and configurations
- Permission levels and security related to the site

Delete a site or workspace:

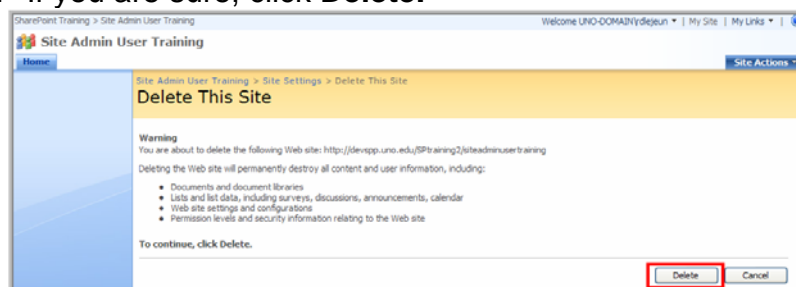
EXERCISE: (we will be deleting the **Site Admin Users** subsite)



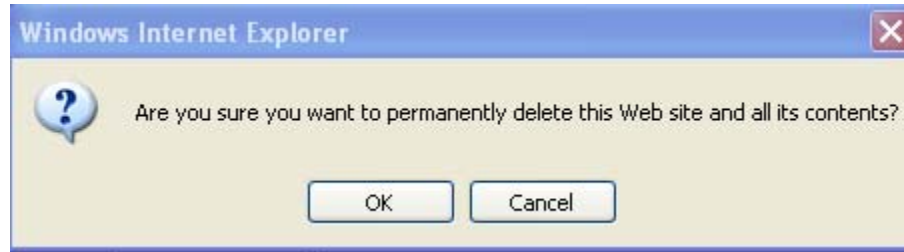
1. Select **Site Actions**
2. **Site Settings**
3. From the **Site Settings** page, select **Delete this site** (use carefully; this will delete the entire site and any data/documents/information stored on this site)



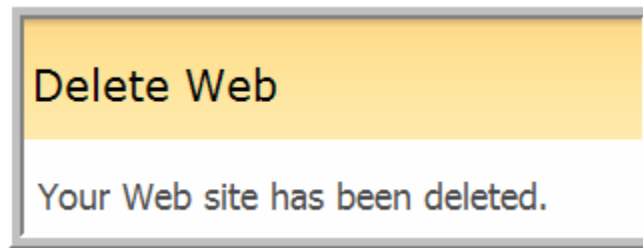
4. You will receive a warning page, asking if you are sure you want to delete? If you are sure, click **Delete**.



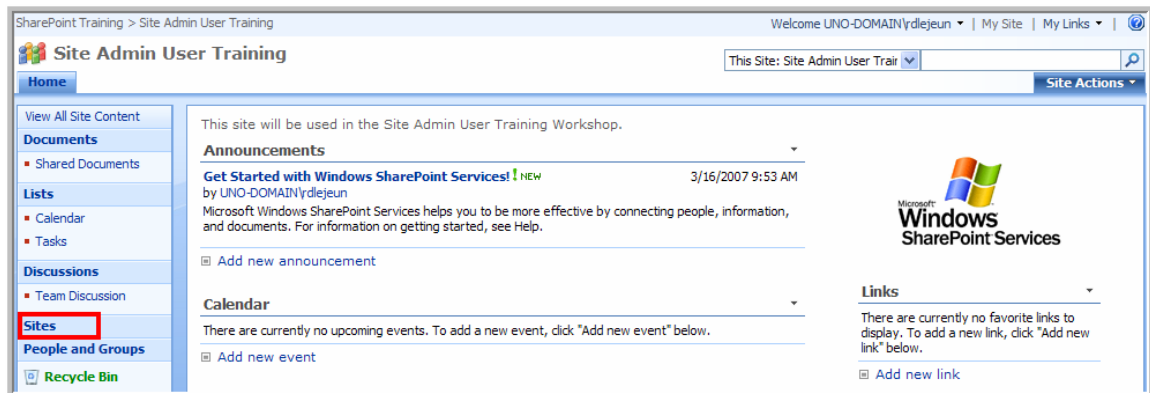
5. You will receive a dialog box, again asking to confirm that you want to delete this site? If you are sure, click **ok**.



6. You will receive a message stating:



7. Use your browser BACK button to return to the **Site Admin User Training site**. You will notice the **Site Admin Users subsite** no longer exists under Sites; it has been deleted.



CREATING AND MANAGING LISTS, LIBRARIES AND VIEWS

A **list** is a collection of information where your college or department can store, share and manage information. For example, you can create a sign-in sheet for an event or track team events on a calendar. You can also host discussions on a discussion board.

A **library** is similar to a list, except that it stores files as well as information about files. You can control how documents are viewed, tracked, managed and created in libraries.

SharePoint allows you the flexibility to **view** each web part in a number of different ways, which will be covered later in this section.

Create a list from a template:

SharePoint provides a number of list templates which already contain columns. These can be used if the data to be stored is suited for the templates provided.

EXERCISE:

1. On the **Site Actions** menu, click **Create**.
2. Under **Communications** or **Tracking** (templates), click the type of list you want to create, such as **Contacts**.
3. On the **New List** screen, enter the **Name**, **Description** and “**yes**” to add this link to the Quick Launch and click **create**.
4. Click **New > Add New Item** to populate the list with information/data.
5. Once data has been added, the arrow to the right of the name allows you to edit or modify the data, if needed.

Create a custom list:

If the list you need does not exist, you are able to create a custom list to fit your specific needs.


EXERCISE:

1. On the **Site Actions** menu, click **Create**.
2. Under **Custom Lists**, click **Custom List**.
3. Enter the **Name**, **Description** and “**yes**” to add this link to the Quick Launch and click **create**.

Add a column to your list:

Now that your custom list has been created, you can add columns to the list. Columns help you categorize and track information, such as your department name or project number. There are several options for creating columns, such as single line of text, a drop-down list in which you specify the options, etc.

EXERCISE:

1. From the list page you want to add the column to, select **Settings**  > **Create Column**.
2. Enter **Name and Type** section, enter the name you want in the **column name** box.
3. Under the **type of information in this column**, select the type of information you want to appear in the column.
4. In the **Additional Column Settings** section, type a description in the **description** box to help people understand the purpose of the column and what data it should contain. (The description is optional.)
5. Depending on the type of column that you selected, more options may appear in the **additional column settings** section. Select the additional settings you want.
6. To add the column to the default view (which allows users to automatically see the column when they first open the list) click **add to default view**.
7. Click **ok**.
8. To add content to your list and columns, click **New > Add New Item**.
9. To modify content, click the drop-down arrow to the right of the title and select **edit item**.

Creating a library:

SharePoint includes several different types of libraries. Although some settings vary, you can use the same basic procedure to create any type of library.

EXERCISE:

1. On the **Site Actions** menu, select **create**.
2. Under **Libraries**, select the type of library you want to create.
3. Select **New** to create a new document within this library or **Upload** to upload one or more documents to this library.

Managing List Settings:

Once your list or library has been created, you can manage the settings of the list or library by:

EXERCISE:

1. From the list or library, select **Settings** [Settings](#), if you are working from a list select **List Settings**; if you are working from a document library select **Document Library Settings**.
2. The **Customize** your list or library page will be displayed. From this page, you can modify general settings, such as the title, description, navigation or versioning. You can also manage permissions or use the communications tools, such as RSS feeds (both of which will be covered in a later section). For now, we will focus on the **General Settings** on this page.

SharePoint Training > Site Admin User Training

Welcome UNO-DOMAIN\ydejeun | My Site | My Links

Site Admin User Training

Home Site Actions

Site Admin User Training > Site Admin Training Hand-Outs > Settings

Customize Site Admin Training Hand-Outs

List Information

Name: Site Admin Training Hand-Outs
Web Address: <http://devspp.uno.edu/SPtraining2/siteadminusertesting/Shared Documents/Forms/AllItems.aspx>
Description: Site Admin Hand-Outs used in training workshops.

General Settings

- Title, description and navigation
- Versioning settings
- Advanced settings
- Audience targeting settings

Permissions and Management

- Delete this document library
- Save document library as template
- Permissions for this document library
- Manage checked out files
- Workflow settings
- Information management policy settings

Communications

- RSS settings

Columns

A column stores information about each document in the document library. The following columns are currently available in this document library:

Column (click to edit)	Type	Required
Title	Single line of text	
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

- Create column
- Add from existing site columns
- Column ordering
- Indexed columns

Views

A view of a document library allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently configured for this document library:

View (click to edit)	Default View
All Documents	✓
Explorer View	

- Create view

3. Select **title, description or navigation** if you need to change that portion of your list or library. Make corrections and click **save**.

SharePoint Training > Site Admin User Training

Welcome UNO-DOMAIN\ydejeun | My Site | My Links

Site Admin User Training

Home Site Actions

Site Admin User Training > Site Admin Training Hand-Outs > Settings > General Settings

Document Library General Settings: Site Admin Training Hand-Outs

Name and Description Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this document library.	Name: <input type="text" value="Site Admin Training Hand-Outs"/> Description: <input type="text" value="Site Admin Hand-Outs used in training workshops."/>
Navigation Specify whether a link to this document library appears in the Quick Launch.	<input checked="" type="radio"/> Yes <input type="radio"/> No

Save Cancel

4. Select **versioning settings** to enable version history of your documents contained in the document library. Set parameters as appropriate for your needs and click **ok**.

SharePoint Training > Site Admin User Training

Welcome UNO-DOMAIN\ydejeun | My Site | My Links

Site Admin User Training

Home Site Actions

Site Admin User Training > Site Admin Training Hand-Outs > Settings > Versioning Settings

Document Library Versioning Settings: Site Admin Training Hand-Outs

Content Approval Specify whether new items or changes to existing items should remain in a draft state until they have been approved. Learn about requiring approval.	Require content approval for submitted items? <input type="radio"/> Yes <input checked="" type="radio"/> No
Document Version History Specify whether a version is created each time you edit a file in this document library. Learn about versions.	Create a version each time you edit a file in this document library? <input checked="" type="radio"/> No versioning <input type="radio"/> Create major versions Example: 1, 2, 3, 4 <input type="radio"/> Create major and minor (draft) versions Example: 1.0, 1.1, 1.2, 2.0 Optionally limit the number of versions to retain: <input type="checkbox"/> Keep the following number of major versions: <input type="text"/> <input type="checkbox"/> Keep drafts for the following number of major versions: <input type="text"/>
Draft Item Security Drafts are minor versions or items which have not been approved. Specify which users should be able to view drafts in this document library. Learn about specifying who can view and edit drafts.	Who should see draft items in this document library? <input checked="" type="radio"/> Any user who can read items <input type="radio"/> Only users who can edit items <input type="radio"/> Only users who can approve items (and the author of the item)
Require Check Out Specify whether users must check out documents before making changes in this document library. Learn about requiring check out.	Require documents to be checked out before they can be edited? <input type="radio"/> Yes <input checked="" type="radio"/> No

OK Cancel

5. **Advanced Settings** allows a user manage content types, specify a document template, set the browser type for your documents, specify a Send-To destination, specify whether the “new folder” command appears on the new menu and specify whether this document library should be visible in search results.

The screenshot shows the 'Document Library Advanced Settings' dialog box for a document library named 'Site Admin Training Hand-Outs'. The dialog is divided into several sections with settings:

- Content Types:** 'Allow management of content types?' with radio buttons for 'Yes' and 'No'.
- Document Template:** 'Template URL:' with a text box containing 'Shared Documents/Forms/template.doc' and a link to 'Edit Template'.
- Browser-enabled Documents:** 'Opening browser-enabled documents' with radio buttons for 'Open in the client application' and 'Display as a Web page'.
- Custom Send To Destination:** 'Destination name:' and 'URL:' text boxes.
- Folders:** 'Display "New Folder" command on the New menu?' with radio buttons for 'Yes' and 'No'.
- Search:** 'Allow items from this document library to appear in search results?' with radio buttons for 'Yes' and 'No'.

At the bottom right are 'OK' and 'Cancel' buttons.

6. **Audience targeting** allows a user to create a targeting column for a particular list to specify which users have access to the data contained therein.

The screenshot shows the 'Modify List Audience Targeting Settings' dialog box. It contains the following elements:

- Enable Audience Targeting:** A section with a description: 'Enabling audience targeting will create a targeting column for this list. Web parts, such as the Content Query Web Part, can use this data to filter list contents based on the user's context.'
- Enable audience targeting:** A checkbox that is currently unchecked.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

A small notification window is visible in the bottom right corner of the dialog, showing a news item from 'UNO Public Relations' dated 'Tuesday, March 20'.

Creating and Managing Views:

SharePoint allows the user flexibility to create the way in which you want to view a particular web part.

Standard View – the view typically displayed is the standard view.

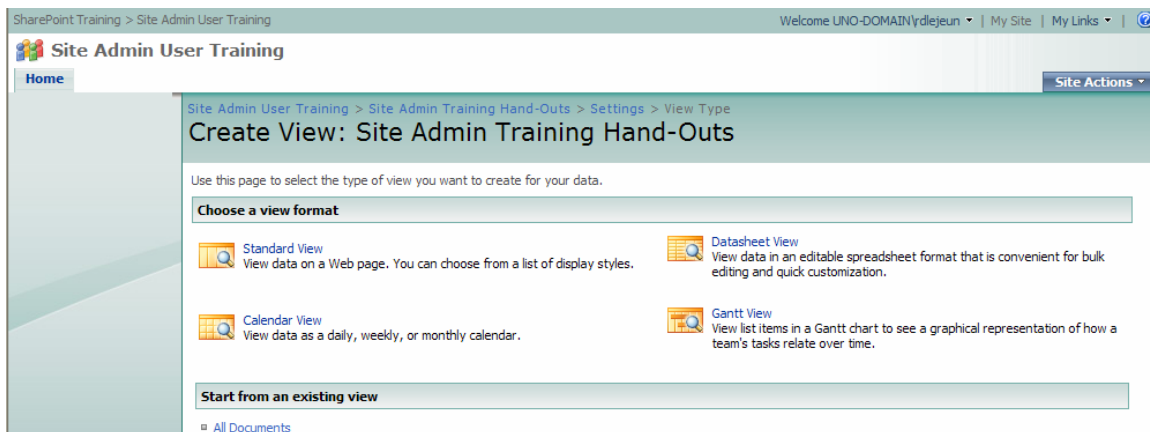
Calendar View – allows you to view your data in a daily, weekly or monthly calendar format.

Datasheet View – allows you to view your data in a spreadsheet format.

Gantt View – allows you to view list items in a Gantt chart to see a graphical representation.

EXERCISE:

- 1) From the Web Part you want to view, select **Settings > Create View**.



To modify or delete a View:

- 1) Click the drop-down arrow next to View. Select **Modify this View** to change the view or **Delete** to delete the view.

SITE CUSTOMIZATION

There are many ways to tailor a site to fit the needs of your department. You can change its structure and appearance, add content, and change site settings. You can apply these custom settings by using your browser without any additional tools (if you have permission to change those settings).

The following are ways to customize your site:

- **Change the title and appearance:** you can change the name and description for a site. You can also change the default graphics on the home page, as well as the theme for the site. The theme is a set of colors, fonts, and decorative elements that provide a consistent appearance to your site pages.
- **Add subsites and web pages:** you can add subsites and web pages to your site. Subsites allow you to divide the site content into distinct, separately manageable sites.
- **Add or change web parts:** you can use web parts to quickly set up and modify pages. A web part is a modular unit of information that forms the basic building block of a web part page. you can add web parts to web part zones in a web part page and then customize the individual web parts to create a unique page for your site users.
- **Add lists and libraries:** lists and libraries store and manage information on your site. Lists store and manage data, such as calendar items, tasks, etc. Libraries store files, such as documents and pictures. Your site comes with some default lists and libraries already set up, including **Calendar, Tasks, Team Discussion** and **Shared Documents**. Your site also comes with templates that provide a starting point for several types of lists and libraries. You can also create your own custom lists and save a list as a template for other lists. You can create views to display the information in list or libraries in different ways for specific users, such as the list items that are assigned to people in a specific department or documents that were created within the past week.
List and libraries enable you to manage information as well as store it. For example, you can enable versioning to track changes to list items and files and to restore previous versions if you make a mistake. You can also stay updated on changes that were made to lists and libraries by using RSS feeds and alerts.
- **Change site navigation:** the two navigation elements that can be customized by site owners are the Quick Launch and the Top Link bar. The Quick Launch is displayed on the side of most pages directly below the View All Site Content link. You can use the Quick Launch to display section headings and links to different areas of your site in a logical manner. The top link bar appears as one or more hyperlinked tabs across the top of all pages on a site. Site owners can choose to display the top link bar of the parent site or display a unique top link bar for their subsite.
- **Configure permissions:** we will cover this in the Managing Users and Groups section.
- **Customize other site settings:** you can customize many other settings for your site, such as regional settings, which include time zone, sort order and calendar. You can also customize how and whether your site appears in search and how people receive updates about changes to your site through RSS feeds and alerts. To view your site settings, click **Site Settings** from the **Site Actions** menu.

Customizing pages by adding, changing or deleting Web Parts:

A Web Part is a component which forms the basic building block of a web part page. You can add web parts in a web part page and then customize them to create a unique page for your site and users.

To customize your web part page, you can add web parts to the page by using either the Add Web Parts dialog box or a Web Part gallery in the tool pane. First, we'll explore adding a web part by using the Add Web Parts dialog box. This is the fastest method to add a web part to your web part page. You can use this dialog box to quickly add lists, libraries and other web parts. If you are the site owner, you can add new web parts to the list that is displayed in the Add Web Parts dialog box, and you can create custom groups that you can use to display certain web parts together in a list.

Adding a Web Part using the Add Web Parts dialog box:

EXERCISE:

1. On the **Site Actions** menu, click **Edit Page**.
2. In the web part zone that you want to add the web part to, click **Add a Web Part**.
3. You can add more than one type of web part by selecting all appropriate boxes you want to add.
4. Click **Add** to add the web parts to the page.

Adding a Web Part using the tool pane:

If you want better control over which web parts are added to web part zones, use the tool pane. You can use the tool pane to select web parts from different web part galleries. You can also use the tool pane to search for web parts and to import new web parts.

EXERCISE:

1. On the **Site Actions** menu, click **Edit Page**.
2. In the web part zone you want to add the web part to, click **Add a Web Part**.
3. Click **Advanced Web Part gallery and options** to display the tool pane.
4. In the tool pane, do one of the following:
 - a. **Browse for a web part:** at the top of the tool pane, click the arrow and then click **browse**. Click the gallery name to view a list of web parts that are available for that gallery. Click **next** to view more web parts in that gallery. (TIP: Click **filter** to display a subset of the web parts in the web part list. You can filter the list to display **all items, web parts, lists** or **libraries**.)
 - b. **Search for a web part:** at the top of the tool pane, click the arrow, and then click **search**.
 - c. **Import a web part:** at the top of the tool pane, click the arrow, and then click **import**.

5. Click the name of the web part you want to add.
6. Select the web part zone that you want to add the web part to and then click **Add**. (TIP: you can also drag the web part to the location that you want on the web part page.)

NOTES: The **closed web parts gallery** contains closed web parts for the active web part page. The **site name gallery** contains web parts for the active site. The **server gallery** contains web parts that are deployed on your server and the **online gallery** contains web parts that are part of an online library.

Changing web parts: if you are the web page owner, you can customize web parts in different ways. From your web browser, you can change web part properties by using the Web Part Maintenance Page.

Change web part properties by using the tool pane: You can change the attributes of a Web Part by assigning values to its web part properties. All web parts share a set of common properties that allow you to specify attributes for the appearance, layout, and other information. A web part can also have custom properties that apply only to that web part.

EXERCISE:

1. On the **Site Actions** menu, click **Edit Page**.
2. Click the Web Part menu **edit** for the web part you want to change the properties and then do one of the following:
 - a. If you are in a shared view, click **Modify Shared Web Part**.
 - b. If you are in a personal view, click **Modify My Web Part**.
3. Change the properties that you want to change.
4. To save your changes and close the tool pane, click **ok**. To view your changes without closing the tool pane, click **Apply**.

The list of properties that apply to the selected Web Part appears in the tool pane. These properties include all the common properties as well as any custom properties that the web part developer has defined for the web part. If you are in personal view, the web part developer may have limited which custom properties can be changed for that web part.

Common web part properties: All web parts share a common set of properties that control their appearance, layout, and advanced characteristics.

APPEARANCE:

Property:

Title

Height

Width

Chrome State

Description:

Specifies the title of the web part that appears in the web part title bar.

Specifies the height of the web part

Width of the web part.

Specifies whether the entire web part appears on the page when a user opens the web part page. by default, the chrome state is set to normal and the entire web part appears. Only the title

Chrome Type

bar appears when the state is set to minimized.

Specifies whether the title bar and border of the web part frame are displayed.

LAYOUT:

Property:

Hidden

Description:

Specifies whether the web part is visible when a user opens the web part page. If the check box is cleared, the web part is visible only when you are designing the page and has the suffix (hidden) appended to the title. You can hide a web part if you want to use it to provide data to another web part through a web part connection, but you don't want to display the web part.

Direction

Specifies the direction of the text in the web part content. For example, Arabic is a right-to-left language; English and most other European languages are left-to-right languages.

Zone

Specifies the zone on the web part page where the web part is located.

Zone Index

Specifies the position of the web part in a zone when the zone contains more than one web part. To specify the order, type a positive integer in the text box. If the web parts in the zone are ordered from top to bottom, a value of 1 means that the web part appears at the top of the zone. If the web parts in the zone are ordered from left to right, a value of 1 means that the web part appears on the left of the zone. For example, when you add a web part to an empty zone that is ordered from top to bottom, the zone index is 1. when you add a second web part to the bottom of the zone, its zone index is 2. to move the second web part to the top of the zone, type 1 and then type 2 for the first web part. NOTE: each web part in the zone must have a unique zone index value. Therefore, changing the zone index value for the current web part can also change the zone index value for other web parts in the zone.

ADVANCED:Property:

Allow minimize

Allow close

Allow hide

Allow zone change

Allow connections

Allow editing in personal view

Export mode

Title URL

Description

Help URL

Help mode

Description:

Specifies whether the web part can be minimized.

Specifies whether the web part can be removed.

Specifies whether the web part can be hidden.

Specifies whether the web part can be moved to a different zone.

Specifies whether the web part can participate in connections with other web parts.

Specifies whether the web part properties can be modified in a personal view.

Specifies the level of data that is permitted to be exported for this web part.

Specifies the URL of a file containing additional information about the web part. The file is displayed in a separate browser window when you click the web part title.

Specifies the Screen Tip that appears when you rest the mouse pointer on the web part title or web part icon. The value of this property is used when you search for web parts by using the SEARCH command on the Find Web Parts menu of the tool pane in the following web part galleries: site, virtual server, and web part page.

Specifies the location of a file containing help information about the web part. The help information is displayed in a separate browser window when you click the help command on the web part menu.

Specifies how a browser will display help content for a web part.




Select one of the following:

- Modal: opens a separate browser window, if the browser has this capability. A user must close the window before returning to the web page.
- Modeless: opens a separate browser window, if the browser has this capability. A user does not have to

	close the window before returning to the web page. this is a the default value.
	<ul style="list-style-type: none"> ▪ Navigate: opens the web page in the current browser window.
Catalog Icon Image URL	Specifies the location of a file containing an image to be used as the web part icon in the web part list. The image size must be 16x16 pixels.
Title Icon Image URL	Specifies the location of a file containing an image to be used in the web part title bar. The image size must be 16x16 pixels.
Import Error Message	Specifies a message that appears if there is a problem importing the web part.

Remove or delete a web part:

EXERCISE:

1. On the **Site Actions** menu, click **Edit Page**.
2. Do one of the following:
 - a. To remove the web part from the page but keep it available for later use, click the **web part** menu  and then click **Close**. You could also just click the close button . A copy of the web part remains in the **Closed Web Parts** gallery and can be added to the page again later. Any customizations made to that web part are saved.
 - b. To permanently delete the web part from the page, click the **web part** menu , click **delete** and then click **ok**. The web part is deleted from the web part page and can be added again later. Any customizations to the web part were not saved.

Customize a web part page:

If you are a site owner or administrator, you can customize your web part page in several ways, such as editing the web part page title bar, adding web parts, customizing the views of list view web parts, and changing the layout of the web part page. After you add web parts to your web part page, you can connect web parts to create even more custom solutions for your page.

Create a personal view or restore the shared view of a web part page: You are in a shared view by default when you view a site or page. Any changes you make to the page while you are in the shared view are visible to anyone who visits the page. if you create a personal view of a page, the changes are only visible to you.

Create a personal view:

EXERCISE:

6. At the top of the page, click **Welcome *your name***, and then click **personalize this page**.
7. Make whatever changes you want to customize the page. You can add or remove web parts, as well as modify the properties of other web parts on the page, customize the views for any list view web parts on the page, and customize the properties of other web parts on the page. NOTE: you can close web parts in a personal view, but you cannot delete web parts from the page.
8. When finished, click **exit edit mode**.

Restore the shared view: You can delete the personalized changes you made to a web part page and revert to the current shared property values for the web parts on the page. CAUTION: the **reset page content** command permanently deletes the personalized web part property values and permanently deletes any personalized web parts. If you want to create another personal view, you must make your customizations again.

EXERCISE:

1. At the top of the page, click **Welcome *your name***, and then click **reset page content**.
2. When you are prompted to confirm that you want to reset the page content, click **ok**. NOTE: the reset page content command is visible only in personal view and if you previously personalized the web part page.

Edit the Web Part title bar: An administrator or user with sufficient permissions to modify a web part can edit the title.

EXERCISE:

1. On the **Site Actions** menu, click **edit page**.
2. Within each web part, click the drop down arrow next to **Edit**
3. **Modify Shared Web Part**
4. From the tool pane to the right, click **+** next to **Appearance**
5. Edit the **Title** as necessary.
6. Click **OK**.
7. **Exit Edit Mode**.

Change the layout of a Web Part Page: You can move web parts around on a web part page to place them in any order or in any web part zone that you want.

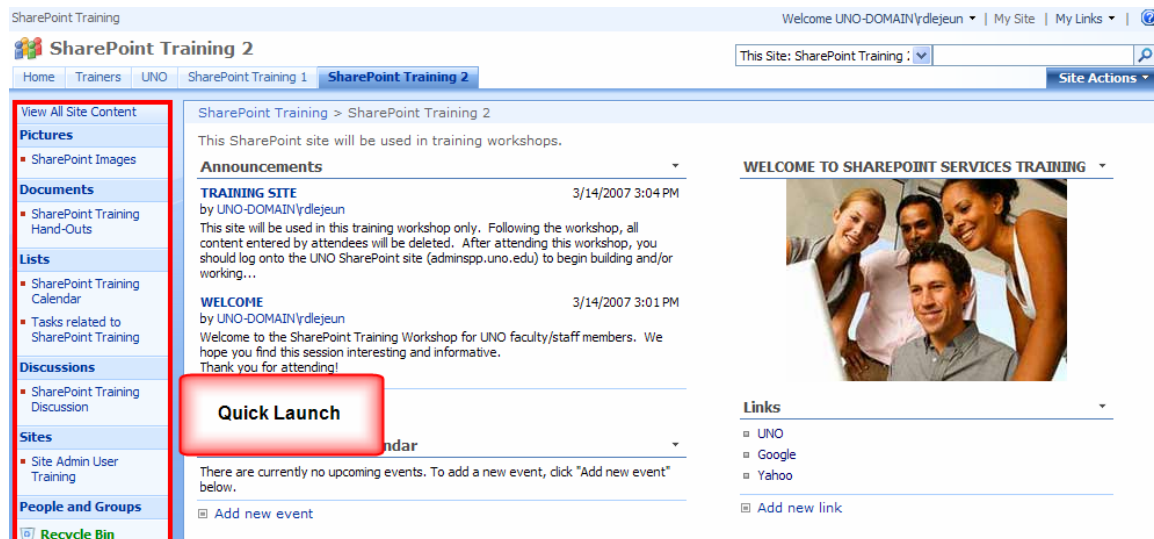
EXERCISE:

1. On the **Site Actions** menu, click **edit page**.
2. Drag the web parts to new locations or web part zones on the page.
3. When finished, click **exit edit mode**.

Customize Site Navigation:

SharePoint provides several different ways to customize the navigation for your site. As a site owner or designer, you are able to add items to and remove items from navigation, including the Quick Launch and top link bar. You can also display a tree view to show the contents and hierarchy of the site. NOTE: you cannot customize breadcrumbs at the top of the page.

Customize Quick Launch: the quick launch is displayed on the home page of a SharePoint site and contains links to featured lists and libraries on the site or subsites.



By using the settings pages for each list or library, you can choose which lists and libraries appear on the Quick Launch. You can also change the order of the links, add or delete links without going to the list or library and add or delete sections, all from within a browser that is compatible with SharePoint. You can even add links to pages outside the site.

Hide or show the Quick Launch: The quick launch appears by default when you first create a site. You can choose to hide or show the quick launch, according to the needs of your site. For example, you can show the quick launch on the top-level site and hide it on subsites.

EXERCISE:

1. On the home page for the site, click **Site Actions** menu, and then select **Site Settings**.
2. In the **Look and Feel** column, click **Tree View**.
3. Do one of the following:
 - a. To hide the Quick Launch, clear the **enable quick launch** check box.
 - b. To show the Quick launch, select the **enable quick launch** check box.
4. Click **ok**.

Add or remove a list or library from the Quick Launch: when you create a new list or library, by default a link to that item is automatically added to the Quick Launch. You can change the navigation option at the time you create a new list or library so that the list or library does not appear on the quick launch. You can also change the option later by editing the **general settings** for the list or library.

EXERCISE:

1. On the Quick Launch, click **View all site content**.
2. Click the name of the list or library.
3. On the **Settings** menu **Settings** ▾, click **List Settings** (or click the setting for the type of library you are opening; for example, in a document library click **document library settings**).
4. In the **general settings** column, click **Title, description and navigation**.
5. In the navigation section, do one of the following:
 - a. To remove the item from the Quick Launch, click **no**.
 - b. To add the item to the Quick Launch, click **yes**.
6. Click **Save**.
7. Click the name of the site to return to the site home page.



Change the order of items on the Quick Launch: you can change the order in which headings or links appear on the quick launch but you can change the order of the links only under a given heading. For example, you may have a heading called Lists that contains links for Calendar and Tasks. You can move the Lists heading to a different location on the Quick Launch, but you can change the order of Calendar and Tasks only under the Lists heading. To move Calendar or Tasks to a different heading, you first need to edit the link to assign it to a different heading.

EXERCISE:

1. On the home page for the site, click the **Site Actions** menu, and then select **Site Settings**.
2. In the **Look and Feel** column, click **Quick Launch**.
3. Click **Change Order**.
4. Click the options in the lists to change the order in which the headings and links are displayed.
5. Click **ok**.

Add, edit, or delete a Quick Launch heading:

EXERCISE:

1. On the home page for the site, click the **Site Actions** menu, and then select **Site Settings**.
2. In the **Look and Feel** column, click **Quick Launch**.
3. Do one of the following:
 - a. To add a new heading, click **New Heading**. Type the URL and a description for the heading, and then click **ok**.
 - b. To edit a heading, click the **edit** button . Make any necessary changes to the URL and description, and then click **ok**.
 - c. To delete a heading, click the **edit** button , and then click **delete**. (NOTE: when deleting a heading, any links contained under that heading are also deleted.) Click **ok**.


Add a Quick Launch link: In addition to including links to lists or libraries on your site, you can add custom links to the Quick Launch. For example, you can include a link to information that you or members of your organization use frequently, such as a document, a calendar event, or even another site.

EXERCISE:

1. On the home page for the site, click **Site Actions**, then **Site Settings**.
2. In the **Look and Feel** column, click **Quick Launch**.
3. Click **New Link**.
4. Type the URL and a description for the link.
5. In the **Heading** list, select the heading under which you want the link to appear.
6. Click **ok**.

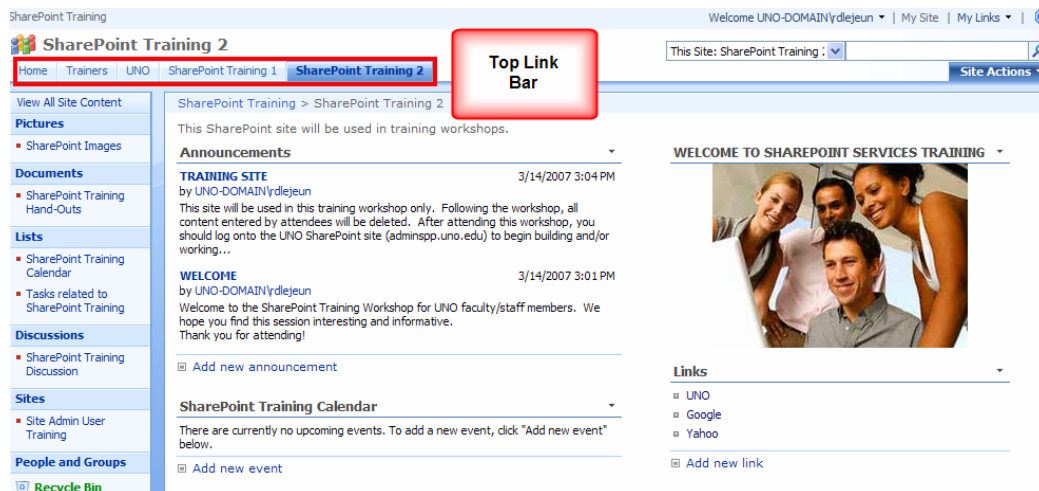
Edit, move or delete a Quick Launch link:

EXERCISE:

1. On the home page for the site, click **Site Actions**, then **Site Settings**.
2. In the **Look and Feel** column, click **Quick Launch**.
3. Click the **edit** button  for the link you want to edit or delete, and then do one of the following:
 - a. To edit the link, make any necessary changes, and then click **ok**.
 - b. To move the link to a different location on the Quick Launch, in the **heading** list, select the new heading under which you want the link to appear, and then click **ok**.
 - c. To delete the link, click **delete**, and then click **ok**.
4. Click the name of the site to return to the site home page.

NOTE: when you delete a link, any links contained under that link are also deleted.

Customize the Top Link bar: The top link bar provides a way for users of your site to get to other sites in the site collection by displaying a row of tabs at the top of every page in the site.



When you create a new site, you can choose whether to include the site on the top link bar of the parent site and whether to use the top link bar from the parent site. This provides you with three different configuration options for your site:

- **Inherited and included in parent:** The site is included as a tab on the top link bar of the parent site and uses the same top link bar as the parent site. The top link bar cannot be customized at this level without first breaking the inheritance from the parent site.
- **Inherited not included parent:** The site uses the same top link bar as the parent site but is not included as a tab on the top link bar of the parent site. The top link bar cannot be customized at this level without first breaking the inheritance from the parent site.
- **Unique:** The site is not included as a tab on the top link bar of the parent site and does not use the same top link bar as the parent site. The top link bar is customizable at this level and is completely

separate from the parent site. NOTE: If a site is renamed from the General Settings page, the site name is not updated on the top link bar. To change the name that appears on the top link bar, you must edit the top link bar.



Configure the top link bar for a site: By default, when you create a new site, the site appears on the top link bar of the parent site, and the new site inherits the top link bar of the parent site. To stop using the top link bar from the parent site, you can change the setting at any time and use a customized top link bar for your subsite.

EXERCISE:

1. On the home page for the site, click the **Site Actions** menu, and then click **Site Settings**.
2. In the **Look and Feel** column, click **top link bar**.
3. Do one of the following:
 - a. To create custom links for the site, click **Stop Inheriting Links**.
 - b. To use the same links as the parent site, click **Use Links from Parent**.

Add, edit, or remove a link from the top link bar: If your site is using a unique top link bar, you can customize the links that appear on the top link bar for the site. Any sites created below the parent site can also be displayed on the top link bar, provided that the sites are configured to inherit the parent top link bar. You can also include links to other sites outside of your site collection.

EXERCISE:

1. On the home page for the site, click the **Site Actions** menu, and then click **Site Settings**.
2. In the **Look and Feel** column, click **Top link bar**.
3. Do one of the following:
 - a. To add a new link, click **new link**. Type the URL and a description for the link.
 - b. To edit a link, click the **edit** button . Make any necessary changes to the description.
 - c. To remove a link, click the **edit** button  and then click **delete**.
4. Click **ok**.

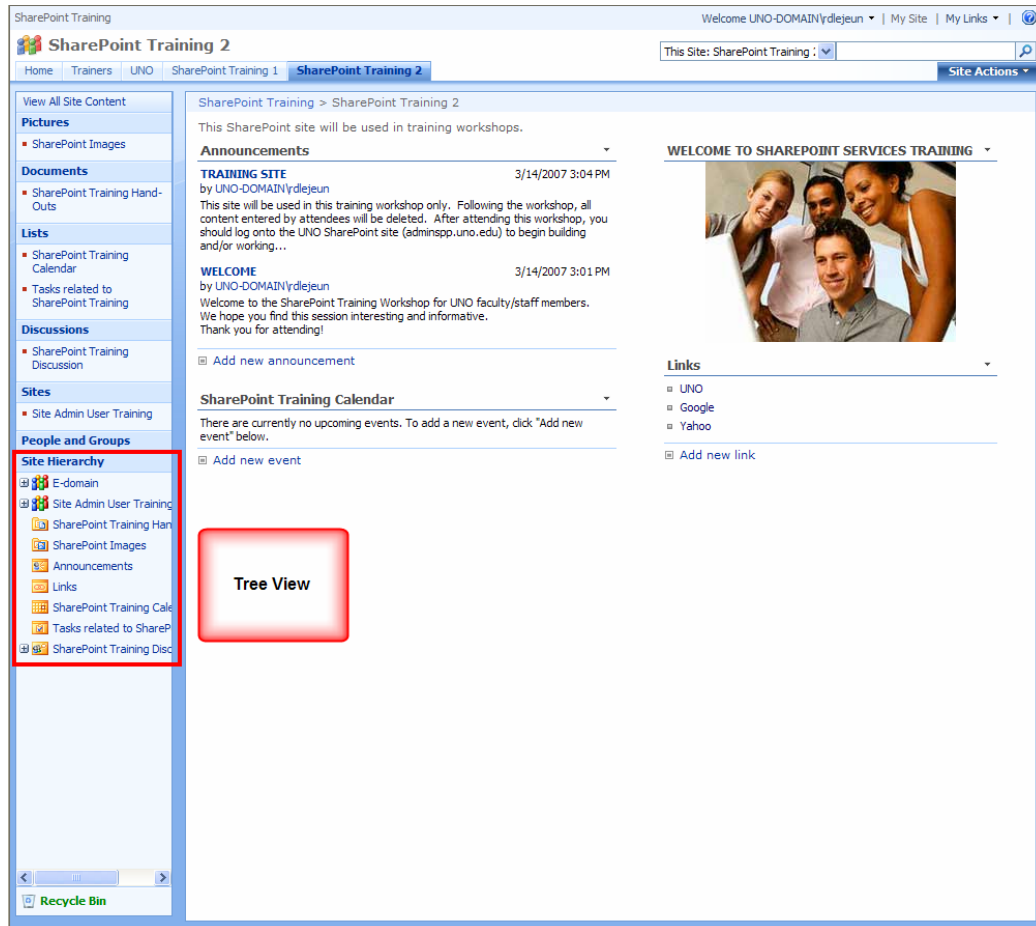
Reorder links on the top link bar: You can change the order in which the tabs are displayed on the top link bar. Any changes that you make to the order of items on the top link bar are reflected in any sites that inherit top link bar navigation from your site.

EXERCISE:

1. On the home page for the site, click the **Site Actions** menu, and then click **Site Settings**.
2. In the **Look and Feel** column, click **Top link bar**.

3. Click **change order**.
4. In the **link order** column, click options in the lists to change the order in which the links appear on the top link bar.
5. Click **ok**.

Show or hide the tree view: The tree view is an extra navigation option that provides a hierarchical view of all sites, lists, and libraries in the site, including any sites below the current site level. **NOTE:** You can only show or hide the tree view. You cannot customize the tree view by using a web browser.



EXERCISE:

1. On the home page for the site, click the **Site Actions** menu, and then click **Site Settings**.
2. In the **Look and Feel** column, click **Tree View**.
3. Do one of the following:
 - a. To show the tree view, select the **Enable Tree View** check box, and then click **ok**.
 - b. To hide the tree view, clear the **Enable Tree View** check box, and then click **ok**.
4. Click the name of the site to return to the site home page.

Modifying a Site Theme:

SharePoint allows the owner/administrator to customize their site by modifying the fonts and color scheme of the site. Applying a theme does not affect your site's layout and will not change any pages that have been individually themed.

EXERCISE:

1. On the home page for the site, click the **Site Actions** menu, and then click **Site Settings**.
2. In the **Look and Feel** column, click **Site Theme**.
3. Select a theme (preview should display on the left side of the page).
4. Click **Apply**.
5. Click the name of the site to return to the site home page.

MANAGING USERS AND GROUPS (PERMISSIONS)

SharePoint User Rights (Permissions):

In SharePoint, access to sites is controlled by role-based memberships. Each user is assigned a role which specifies the actions a user can perform on the site. The user roles are as follows:

- Full control: allows a user to have full control of the site within SharePoint.
- Design: allows user to view, add, update, delete, approve and customize the site.
- Contribute: allows user to view, add, update and delete the site.
- Read: allows the user to view only.

SharePoint Training > Site Settings > Permissions > Add Users

Add Users: SharePoint Training

Use this page to give new permissions.

Add Users
You can enter user names, group names, or e-mail addresses. Separate them with semicolons.
[Add all authenticated users](#)

Give Permission
Choose the permissions you want these users to have. You can add users to a SharePoint group (which is already assigned to a permission level), or you can add users individually and assign them to a specific permission level.
SharePoint groups are recommended as they allow for ease of permission management across multiple sites.

Users/Groups:

Give Permission
☒ Add users to a SharePoint group
SharePoint Training Members [Contribute]
[View permissions this group has on sites, lists, and items...](#)
☐ Give users permission directly

☐ Full Control - Has full control.
☐ Design - Can view, add, update, delete, approve, and customize.
☐ Contribute - Can view, add, update, and delete.
☐ Read - Can view only.

List, Site and Personal Permissions:

SharePoint includes 33 permissions, which are used in the four default permission levels. Permissions are categorized as list permissions, site permissions and personal permissions, depending upon the objects to which they apply. For example, site permissions apply to particular sites, list permissions apply only to lists and libraries and personal permissions apply only to things like personal views, private web parts, etc. The following tables show permissions and permission levels assigned, by default.

LIST PERMISSIONS:

<u>Permission:</u>	<u>Full Control:</u>	<u>Design:</u>	<u>Contribute:</u>	<u>Read Only:</u>
Manage Lists	x	x		
Override Check-Out	x	x		
Add Items	x	x	x	
Edit Items	x	x	x	
Delete Items	x	x	x	
View Items	x	x	x	x
Approve Items	x	x		
Open Items	x	x	x	x
View Versions	x	x	x	x
Delete Versions	x	x	x	
Create Alerts	x	x	x	x
View Application Pages	x	x	x	x

SITE PERMISSIONS:

<u>Permission:</u>	<u>Full Control:</u>	<u>Design:</u>	<u>Contribute:</u>	<u>Read Only:</u>
Manage Permissions	x			
View Usage Data	x			
Create Subsites	x			
Manage Web Site	x			
Add & Customize Pages	x	x		
Apply Themes & Borders	x	x		
Apply Style Sheets	x	x		
Create Groups	x			
Browser Directories	x	x	x	
Self-Service Site Creation	x	x	x	x
View Pages	x	x	x	x
Enumerate Permissions	x			
Browse User Information	x	x	x	x
Manage Alerts	x			
Use Remote Interfaces	x	x	x	x
Use Client Integration	x	x	x	x
Open	x	x	x	x
Edit Personal User Info	x	x	x	

PERSONAL PERMISSIONS:

<u>Permission:</u>	<u>Full Control:</u>	<u>Design:</u>	<u>Contribute:</u>	<u>Read Only:</u>
Manage Personal Views	x	x	x	
Add Private Web Parts	x	x	x	
Remove Private WebParts	x	x	x	
Update Personal webparts	x	x	x	

SharePoint provides security features that you (as the site owner) can use to help control access to your sites. By using these features, site owners can control who can access the site, and specifically, what permissions are assigned for users.

Regardless of what type of site you have, the security and permissions for your site include the following elements:

- **Users:** A person with a user account that can be authenticated through the web server. Users can be added directly to a securable object or indirectly by adding them to a SharePoint Group which is then added to a securable object. Although users do not have to be part of a group, it is much easier to manage permissions for groups rather than large numbers of users.
- **SharePoint Group:** A group of users that you can create on a SharePoint site to manage permissions to the site. All SharePoint groups are created at the site collection level and are available to any subsite in the site collection. However, you can choose to create a SharePoint group that only has permissions on a particular subsite. SharePoint provides three default groups: **Site name owners**, **Site name members** and **Site name readers**. Each of these groups is associated with a default permission level, but you can change the permission level for any SharePoint group as needed.
 - **Site name owners** group have full control permissions
 - **Site name members** have contribute permissions
 - **Site name readers/visitors** have read only permissions
- **Permission:** Authorization to perform specific actions such as viewing pages, opening items, and creating subsites. Permissions are not assigned directly to users or groups. Instead, permissions are assigned to one or more permission levels, which are in turn assigned to users or groups.
- **Permission level:** A set of permissions that can be granted to users or SharePoint groups on a securable object such as a site, library or list. Permission levels enable you to assign a set of permissions to users and groups so that they can perform specific actions on your site. With permission levels, you can control which permissions are granted to users/groups on your sites.
- **Securable object:** An object on which permissions can be configured, such as a site, list, library, folder within a list or library, list item or document. Permissions for users/groups can be assigned to a specific securable object.

Controlling Access to Site and Site Content:

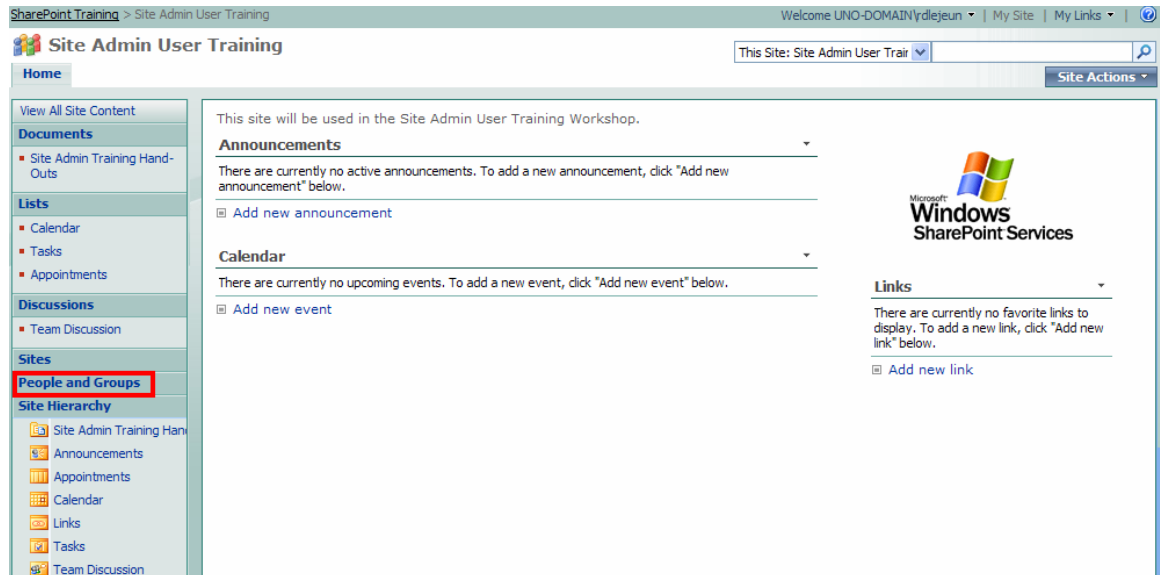
As a site owner, when you create the permission structure for your site, try to balance ease of administration with the need to control specific permissions. For easiest administration, begin by using the default SharePoint groups (*site name* owners, *site name* members and *site name* visitors). It is recommended that you make most users either *site name* members or visitors. Do not add every user as a *site name* owner. By default, site members can contribute to the site, add or

remove items and documents, but cannot change the structure of the site or change site settings or appearance. You can create additional SharePoint groups and permission levels if you need finer control over the actions of users.

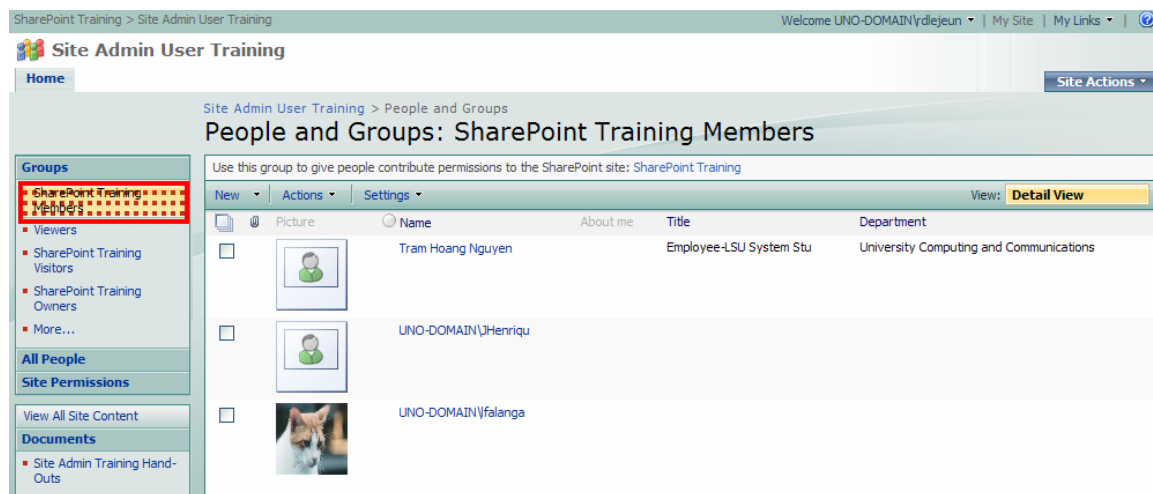
Adding a user to a group:

EXERCISE:

1. From your site, select **People and Groups**



2. Notice all the groups created by SharePoint. Decide which groups your user will be added to and click that group name.



3. To add a user to that group, select **New** **New** > **Add Users**
On the **Add Users** page, enter the users user name, assign the appropriate permission for this individual, personalize a message which will be distributed via email and click **ok**.

SharePoint Training > Site Admin User Training

Welcome UNO-DOMAIN\rdlejeun | My Site | My Links

Site Admin User Training

Home

Site Actions

Site Admin User Training > Site Settings > Permissions > Add Users

Add Users: Site Admin User Training

Use this page to give new permissions.

Add Users

You can enter user names, group names, or e-mail addresses. Separate them with semicolons.

[Add all authenticated users](#)

Give Permission

Choose the permissions you want these users to have. You can add users to a SharePoint group (which is already assigned to a permission level), or you can add users individually and assign them to a specific permission level.

SharePoint groups are recommended as they allow for ease of permission management across multiple sites.

Send E-Mail

Use this option to send e-mail to your new users. You can personalize the message that is sent.

Links and information about the site will be added below your personal message.

Users/Groups:

Give Permission

☒ Add users to a SharePoint group

SharePoint Training Members [Full Control, Design, Contribute]

[View permissions this group has on sites, lists, and items...](#)

☐ Give users permission directly

This site is using the same permissions as its parent site. To manage permissions directly for this site, navigate to the Site Permissions page and click Edit Permissions on the toolbar.

Send welcome e-mail to the new users

☒

Subject:

Welcome to the SharePoint group: SharePoint Training Members fo

Personal Message:

OK Cancel

4. The user has been added to the group.

Removing a user from a group:

EXERCISE:

1. From your site, select **People and Groups**

SharePoint Training > Site Admin User Training

Welcome UNO-DOMAIN\rdlejeun | My Site | My Links

Site Admin User Training

Home

This Site: Site Admin User Train

Site Actions

View All Site Content

Documents

- Site Admin Training Hand-Outs

Lists

- Calendar
- Tasks
- Appointments

Discussions

- Team Discussion

Sites

- People and Groups**

Site Hierarchy

- Site Admin Training Hand-Outs
- Announcements
- Appointments
- Calendar
- Links
- Tasks
- Team Discussion

This site will be used in the Site Admin User Training Workshop.

Announcements

There are currently no active announcements. To add a new announcement, click "Add new announcement" below.

[Add new announcement](#)

Calendar

There are currently no upcoming events. To add a new event, click "Add new event" below.

[Add new event](#)

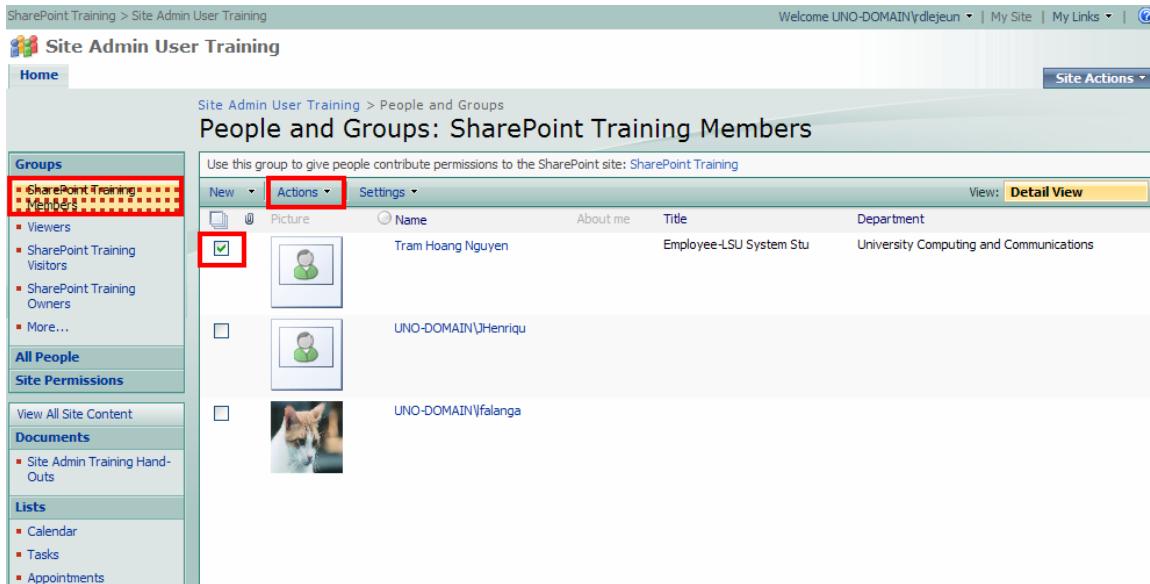
Links

There are currently no favorite links to display. To add a new link, click "Add new link" below.

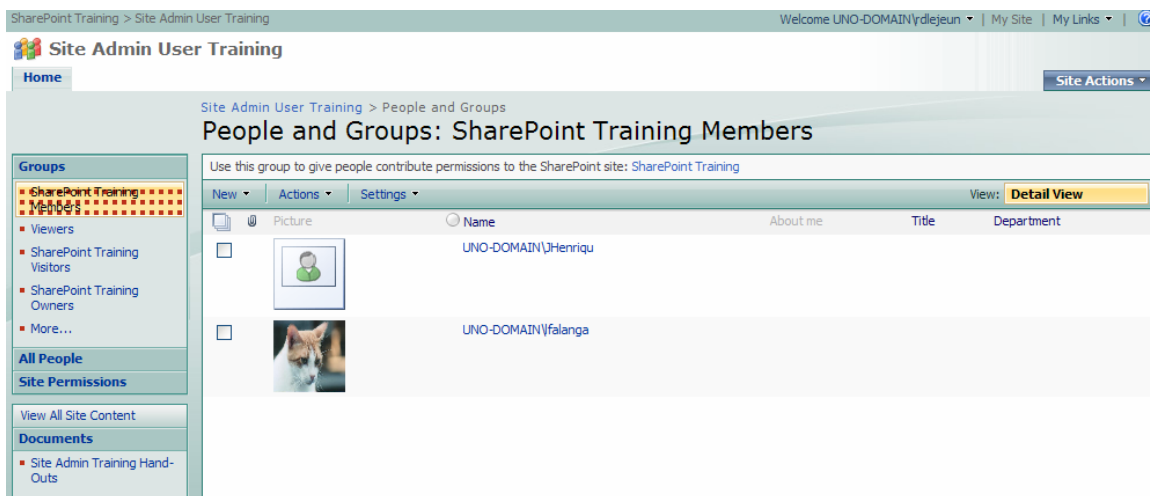
[Add new link](#)

Microsoft Windows SharePoint Services

2. Make sure you have selected the group you want to remove this user from. Check the box next to the users name and then select **Actions > Remove User from Group**.



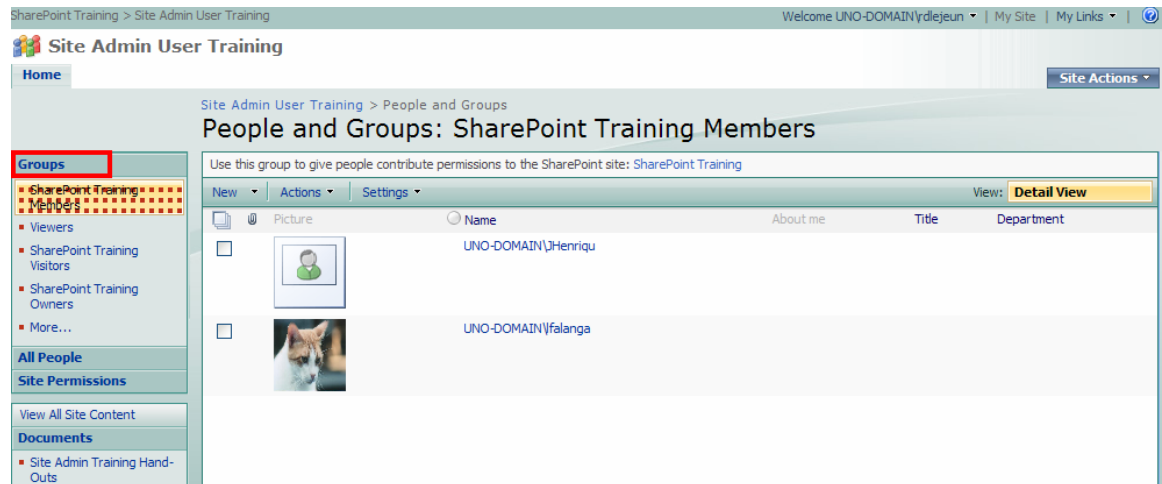
3. You will receive a dialog box asking if you are sure you want to delete this user? If so, click **ok**. The user has been deleted from this group.



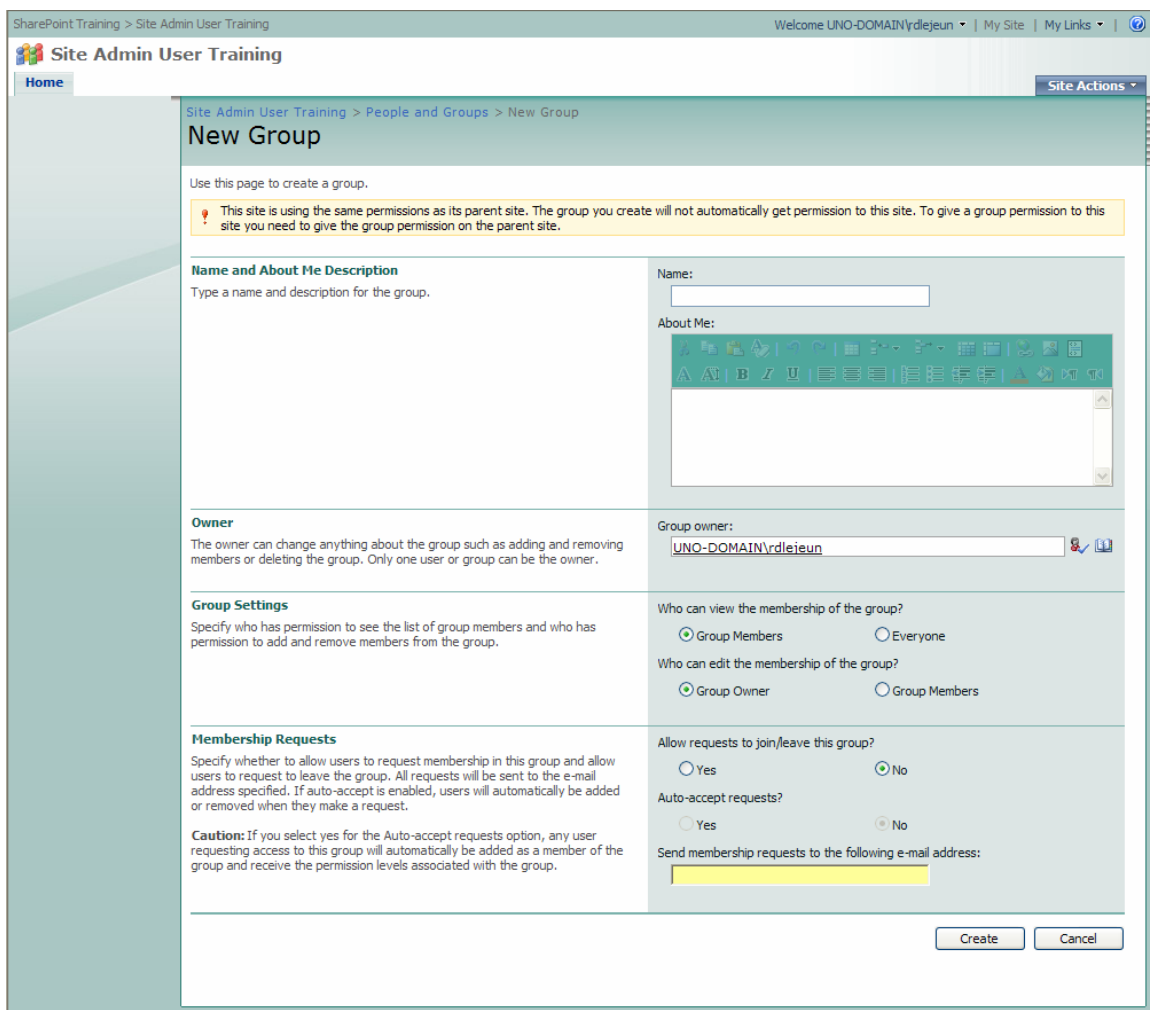
To add a group:

EXERCISE:

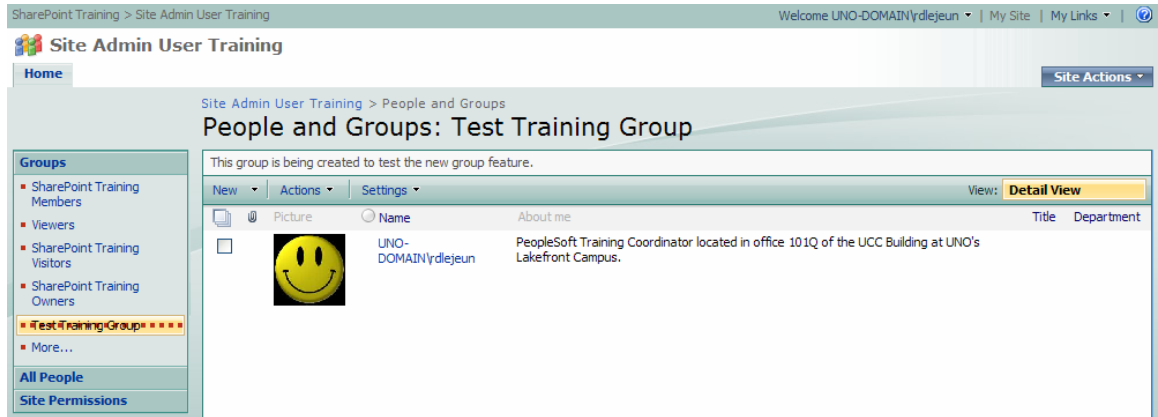
1. From your site, select **People and Groups**
2. Select **Groups**



3. Select **New > New Group**

The screenshot shows the 'New Group' page in the SharePoint Training site. The page title is 'New Group' and the breadcrumb is 'Site Admin User Training > People and Groups > New Group'. A yellow warning box states: 'This site is using the same permissions as its parent site. The group you create will not automatically get permission to this site. To give a group permission to this site you need to give the group permission on the parent site.' The page is divided into several sections: 'Name and About Me Description' with fields for 'Name' and 'About Me'; 'Owner' with a 'Group owner' field set to 'UNO-DOMAIN\rdlejeun'; 'Group Settings' with radio buttons for 'Who can view the membership of the group?' (Group Members selected) and 'Who can edit the membership of the group?' (Group Owner selected); and 'Membership Requests' with radio buttons for 'Allow requests to join/leave this group?' (No selected) and 'Auto-accept requests?' (No selected). A 'Send membership requests to the following e-mail address:' field is also present. At the bottom right are 'Create' and 'Cancel' buttons.

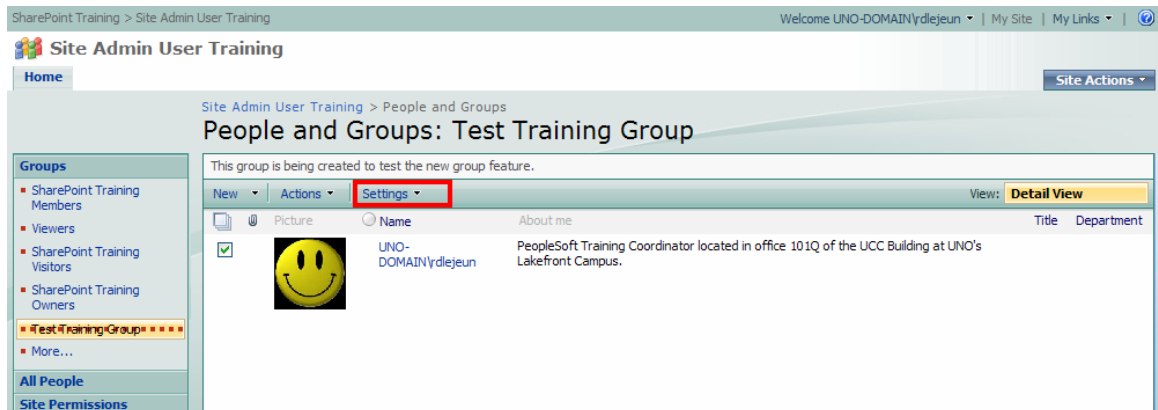
4. Enter all requested information and click **create**. Your new group has been created.



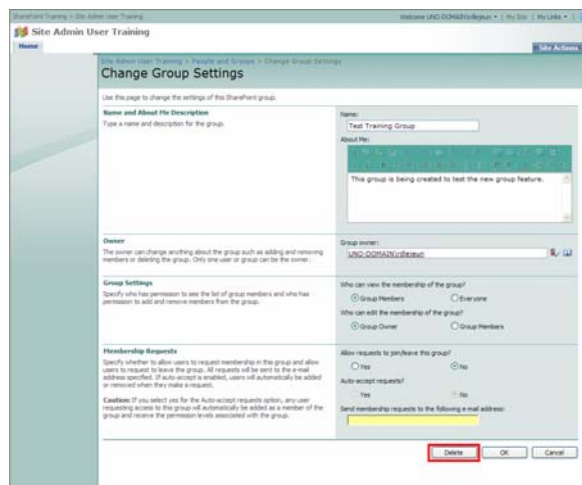
To remove a group:

EXERCISE:

1. From your group page, check the box next to the group you want to delete, then select **Settings > Group Settings**.



2. On the **Change Group Settings** page, scroll to the bottom and click **delete**.

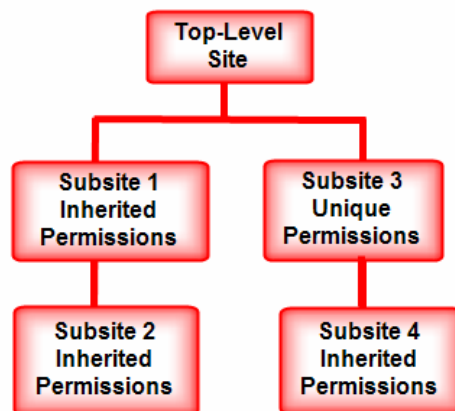


3. You will receive a dialog box asking if you are sure you want to delete this SharePoint Group? If you are sure, click **ok**. The group has been deleted.

Inheriting Permissions:

By default, permissions on lists, libraries, folders within lists and libraries, items and documents are inherited from their parent site. However, you can break this inheritance for an securable object at a lower level by editing the permissions (that is, creating a unique permission assignment). For example, you can edit the permissions for a document library, which breaks the inheritance from the site.

The following figure shows a site collection hierarchy with a top-level web site and subsites that inherit permissions from their parent site as well as a subsite with unique permissions.

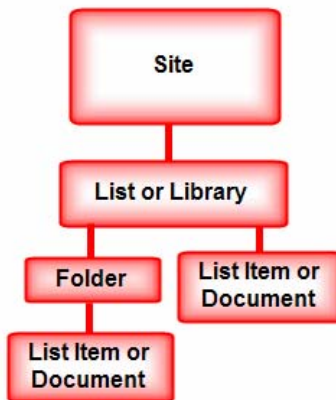


In this figure, subsite 1 inherits permissions from the top-level web site. This means that changes made to SharePoint groups and permission levels on the top-level site also affect Subsite 1.

Subsite 2 is also inheriting permissions from its parent (subsite 1). However, because subsite 1 is also inheriting from its parent, changes made to SharePoint groups and permission levels on the top-level site affect both subsite 1 and 2. This is because you cannot manage permissions on a subsite that is inheriting permissions. Instead you either manage the permissions of the parent or you can break the inheritance and create unique permissions.

Subsite 3 has unique permissions. This means that it does not inherit permissions from its parent site. Therefore, any changes made to the permission levels and SharePoint groups on subsite 3 do not affect its parent site. Because Subsite 4 is inheriting permissions from subsite 3, any changes to permission levels or SharePoint groups on subsite 3 affect both sites.

Each site contains additional securable objects which have a particular position in the site hierarchy.



Lower-level securable objects automatically inherit permissions from their parent. For example, a list or library inherits permissions from the site, and list items and documents inherit permissions from the list, library or folder that contains them. You can break this inheritance at any point in the hierarchy and assign unique permissions. When you break the inheritance from the parent, the securable object from which you broke the inheritance receives a copy of the parent's permissions. You can then edit those permissions to be unique – meaning that any changes you make to the permissions on that securable object do not affect the parent.

Best Practices for assigning permissions in SharePoint:

It is easiest to manage permissions at only the site level, whenever possible. This means you should create your site hierarchy in a way that allows you to assign permissions to sites that are appropriate to all securable objects within the site, such as lists, libraries, folders within lists or libraries, documents and items. Although you can assign unique permissions on any securable object in the site hierarchy, to do so is more cumbersome than inheriting permissions. It gets more difficult when some lists or libraries within a site have unique permissions applied, and when some sites have subsites with unique permissions and some with inherited permissions. As much as possible, arrange sites, subsites, lists and libraries so that they can inherit most permissions. Put sensitive data into separate subsites, lists, libraries and so on.

For example, it is much easier to manage permissions using a hierarchy like the one shown in the following example, rather than mixing sensitive and non-sensitive data in the same sites, lists and libraries.

- ❖ **Site A** Group home page
 - **List A** Non-sensitive data (inherited permissions)
 - **Document Library A** Non-sensitive data (inherited permissions)
 - **Subsite B** Sensitive data (unique permissions)
 - **List B** Sensitive data (unique permissions)
 - **Document Library B** (unique permissions)

Notice that the list and library in Site A contain non-sensitive data and Subsite B was created below Site A to contain a list and library storing sensitive data. In this scenario, you can assign permissions to Site A that are appropriate to List A and Document Library A and create unique permissions on Subsite B which are appropriate for List B and Document Library B.

SITE ADMINISTRATION

Regional Settings:

Every web site can be customized to use specific regional settings that are used as the default settings for all users of your site. As the site owner, you can specify the following regional settings for your sites:

- **Locale:** this setting controls how locale-specific information, such as numbers, dates, time and calendar settings are displayed on the site. The default values for all of the other regional settings (listed below) are based on the locale that you choose. When you change the locale setting for a site, all other regional settings are set to the default settings for the new locale. After selecting the locale you want, you can then change these other settings as you want.
- **Sort Order:** this setting controls the sort orders that are used for lists and libraries.
- **Time Zone:** this setting controls the time zone for the web site.
- **Set Your Calendar:** this specifies the type of calendar that you want as your primary calendar. You can also choose whether to display the week of the year, where 1 represents the first week of the year and 52 represents the last week of the year.
- **Enable an Alternate Calendar:** this setting enables the settings of an optional calendar to be added to the calendar that you set for your sharepoint site.
- **Define Your Work Week:** specifies which days of the week make up your work week, the first day of each work week, and the first week of the year. You can also specify the start and end time of work days.
- **Time Format:** specifies whether to display the time in 12-hour or 24-hour format.

Changing regional settings for a site:

EXERCISE:

1. Open the site on which you want to change the default regional settings.
2. Select **Site Actions > Site Settings > (Under Site Administration) Regional Settings**
3. On the Regional Settings page, select the settings you want for this site, and then click **ok**.

The screenshot shows the 'Regional Settings' page in a SharePoint environment. The page title is 'Regional Settings' and it includes a breadcrumb trail: 'Site Admin User Training > Site Settings > Regional Settings'. The page contains several sections for configuring regional settings:

- Locale:** Specify the world region that you would like the site dates, numbers and sort order to be based on. The dropdown menu is set to 'English (United States)'.
- Sort Order:** Specify the sort order. The dropdown menu is set to 'General'.
- Time Zone:** Specify the standard time zone. The dropdown menu is set to '(GMT-06:00) Central Time (US and Canada)'.
- Set Your Calendar:** Specify the type of calendar. The dropdown menu is set to 'Gregorian'. There is an unchecked checkbox for 'Show week numbers in the Date Navigator'.
- Enable An Alternate Calendar:** Specify a secondary calendar that provides extra information on the calendar features. The dropdown menu is set to 'None'.
- Define Your Work Week:** Select which days comprise your work week and select the first day of each work week. The days are represented by checkboxes: Sun (unchecked), Mon (checked), Tue (checked), Wed (checked), Thu (checked), Fri (checked), Sat (unchecked). Below this, the 'First day of week' is set to 'Sunday', 'Start time' is '8:00 AM', 'First week of year' is 'Starts on Jan 1', and 'End time' is '5:00 PM'.
- Time Format:** Specify whether you want to use 12-hour time format or 24-hour format. The dropdown menu is set to '12 Hour'.

At the bottom right of the form, there are 'OK' and 'Cancel' buttons.

Viewing Site Usage Data:

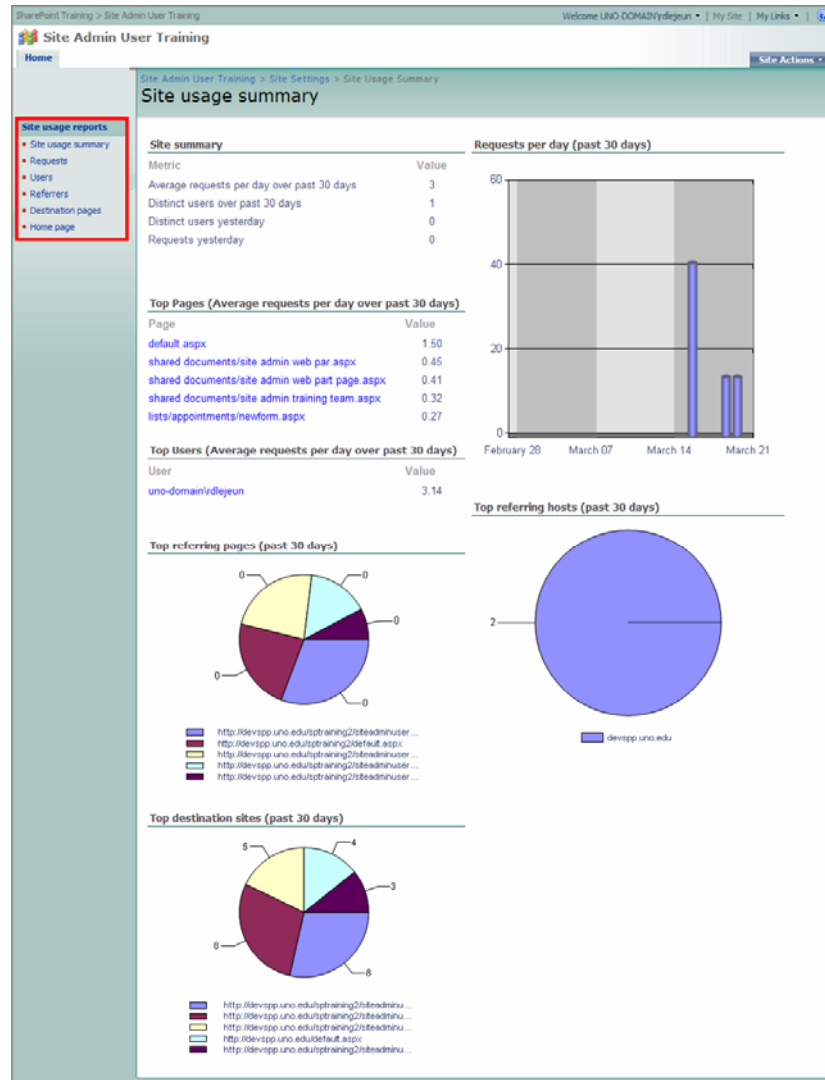
If you are interested on the affect your web site has, you can track how many users visit your site and the number of hits your site receives and other site-usage information. Summary and detailed usage reports will supply this information.

Tracking usage can be helpful for identifying which content on your site is being heavily used (and therefore should be kept) and which content is not being used (and may be a candidate for removal). In addition to site usage statistics, you can track how much storage space your site is taking up and the level of activity that your site is generating.

To view site-usage data:

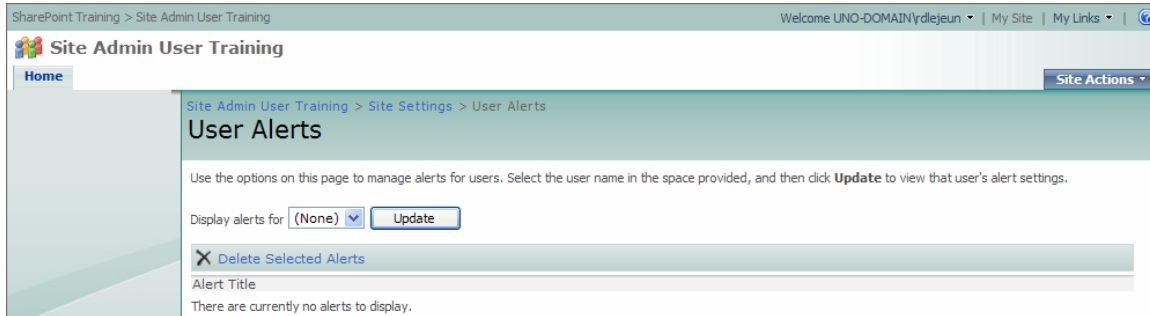
EXERCISE:

1. Open the site on which you want to view site-usage data statistics.
2. Select **Site Actions > Site Settings > (Under Site Administration) Site Usage Reports**
3. The site usage information will be displayed. The **Site Usage Reports** on the left side of the screen provide a listing of additional reports available.



Manage user alerts:

As the site owner, you can manage alerts for other users within this site. To display alerts for another user, select the username of the individual in the “**Display alerts for**” drop-down box and then click **Update**. This will list all alerts for this user. You can check the box of any to be deleted and click **Delete Selected Alerts**. Once completed, that user will no longer be alerted of changes to that particular list, library or item.



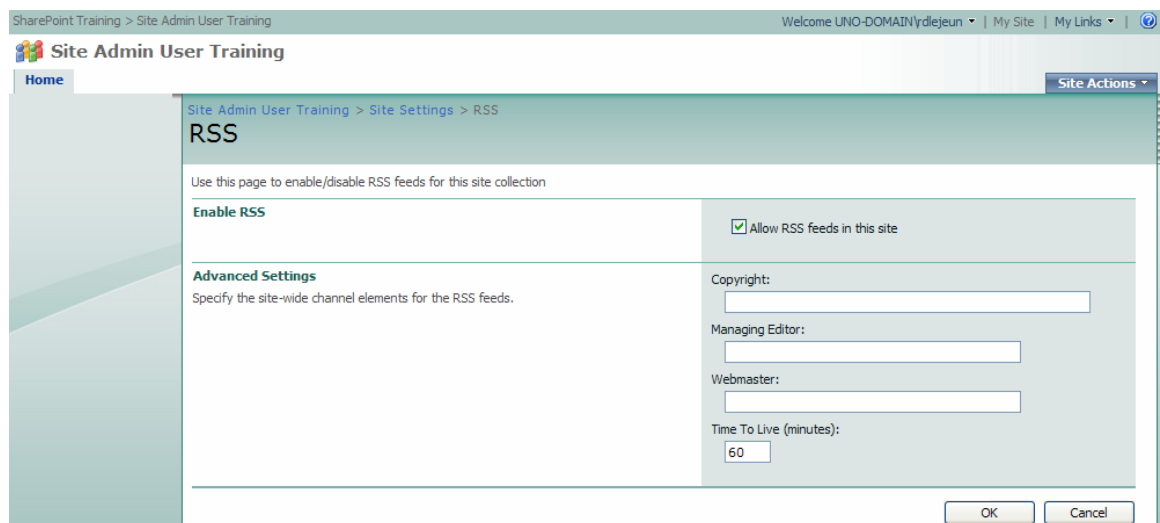
Enable/disable RSS feeds:

Really Simple Syndication (RSS) is a way for you to make news, blogs, and other content on a web site available to users. Before others can view RSS content or feeds, the site owner must enable and configure RSS support on a site.

Enable and configure RSS feeds for a site:

EXERCISE:

1. From your site, select **Site Actions > Site Settings > (Under Site Administration) RSS**



2. In the **Enable RSS** section, select the **Allow RSS feeds in this site** check box to activate RSS feeds.

3. In the **Copyright** box, type the text of the copyright notice. (Depending on the type of RSS reader that you use to view an RSS feed, the copyright may or may not appear at the bottom of the RSS feed.)
4. In the **Managing Editor** box, type the name of the managing editor for the RSS content. (The name of the managing editor appears at the bottom of the RSS feed.)
5. In the **webmaster** box, type the name of the webmaster for the RSS content. (The name of the webmaster appears at the bottom of the RSS feed.)
6. In the **Time to Live** (minutes) box, type the number of minutes that users should wait to check for updates to an RSS feed. (The number of minutes appears at the bottom of the RSS feed.)
7. Click **ok**.