

SharePoint Basics

For CA/PPT Agencies & Centers



CA/PPT/S/TO

Module 1

SharePoint Basics

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Module 2

SharePoint Site Development

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Introduction to SharePoint

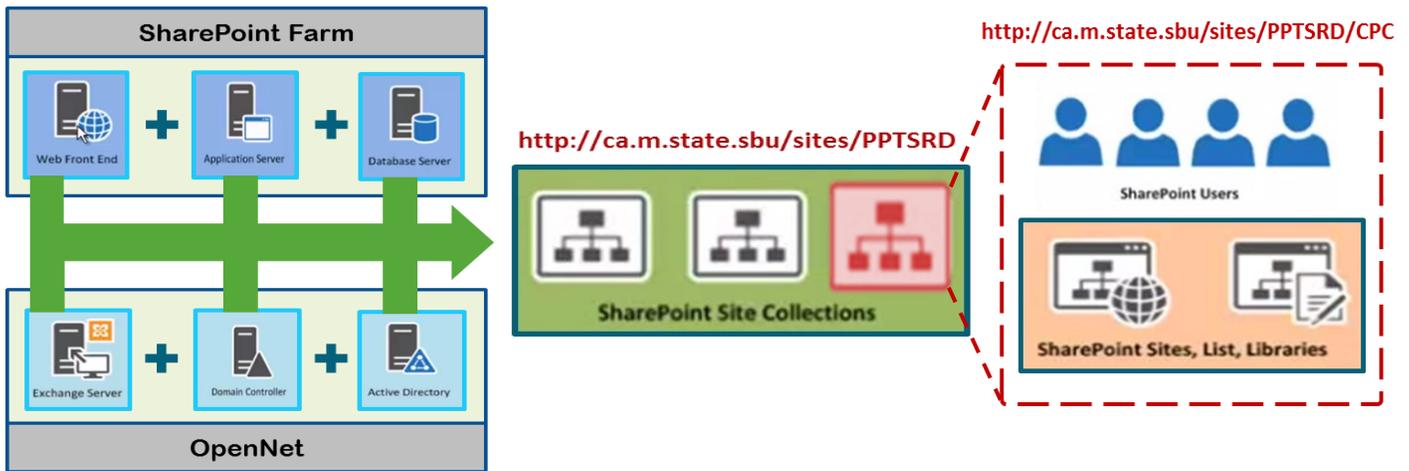
✓ SharePoint is:

- ◆ A Web-Based Platform
- ◆ A Collaboration Tool
- ◆ A Virtual Workspace for Projects
- ◆ A Process Automation Tool

X SharePoint is NOT:

- ◆ A file management system
- ◆ A "cloud" file server
- ◆ An application
- ◆ A share drive replacement

SharePoint Infrastructure



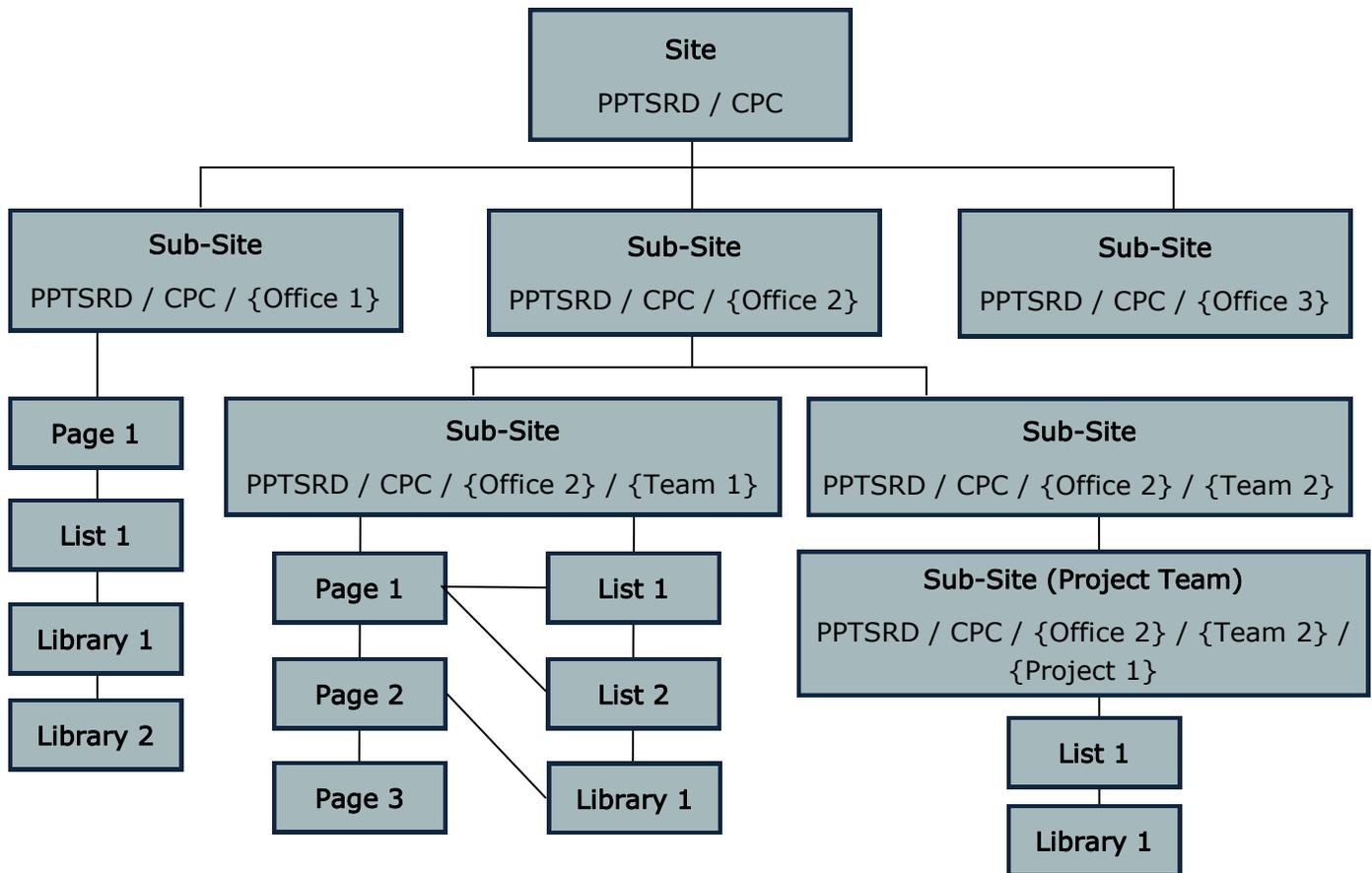
Elements of a SharePoint Site

Site	<p>The main collection of sub-sites, pages, lists, and libraries that encompasses all content related to a location (i.e. passport centers, agencies, or headquarters). This site is found on a SharePoint Site Collection.</p> <p>All of CPC's content is found on the CPC site on the PPTSRD site collection (PPTSRD / CPC)</p>
Sub-Sites	<p>The top-level site (PPTSRD/CPC) can be further divided into sub-sites for individual offices. These sub-sites can in turn be further divided into team sites, project sites, etc. Each sub-site can have unique pages, libraries, and lists.</p>
Pages	<p>Editable spaces that can display information (such as contact information) or aggregate content from around a site. A page can include simple text, hyperlinks, or web-parts that link to other elements of the page's parent site.</p>



Lists	<p>Collections of similar content items that are connected to user defined columns. SharePoint lists are similar to Excel spreadsheets, but have the added benefit of “views”.</p> <p>Views allow users to interpret information in many different ways. For example, a list of deadlines can be viewed as a calendar, or different team members can view different columns depending on their need to know.</p>
Libraries	<p>Libraries are specialized lists that allow for the storage and distribution of documents such as Microsoft office documents, PDFs, images, or multi-media files. Libraries enable document-specific editing features and allow users to view the revision history of individual documents.</p>

Sample Site Infrastructure





Sites, Sub-Sites, & Pages

SharePoint sites and sub-sites act as landing pages for a location, office, team, or project. Every site can be customized to include pertinent & unique information. This information is displayed using **Web Parts**, which are modular units of information that form the basic building block of a SharePoint sites.

Web Parts can be used to dynamically show the content of lists & libraries or to display rich text & graphics on SharePoint sites. Below are common web parts used by CA SharePoint Sites:

- ❶ **Documents Portal:** Displays the content of a library or list from within the site. The data or documents can be filtered using views if necessary.
- ❷ **Content Editor:** A rich text editable space that can be used to display print information such as announcements, contact information, helpful links etc.
- ❸ **Calendars:** Displays a list in calendar view to highlight important dates, such as holidays.
- ❹ **Graphics:** Images or logos can be added throughout the site using web parts.

SharePoint Site

Site Actions ▾ Browse Page Southgate, Jonathan A ▾

UNITED STATES DEPARTMENT OF STATE Prototype I Like It Tags & Notes

Prototype Project Team 1 External Links ▾ Search this site...

Libraries Reports Lists Team Meetings Item Tracking Pages FAM Citations Recycle Bin All Site Content

Team Meetings ❸

November, 2015

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10 1:00 pm - 2:00 pm Status Meeting	11	12	13	14
15	16	17 1:00 pm - 2:00 pm Status Meeting	18	19	20	21
22	23	24 1:00 pm - 2:00 pm Status Meeting	25	26	27	28
29	30	1 1:00 pm - 2:00 pm Status Meeting	2	3	4	5

Office 2 / All Projects ❶

Type	Name	Office	Project
	Analysis_4	Office 2	Project 1
	Report_5 NEW	Office 2	Project 2

Office 3 / Project 2 ❶

Type	Name	Office	Project
	Report_1	Office 3	Project 2
	Analysis_2	Office 3	Project 2
	Analysis_1	Office 3	Project 2

Helpful Links: ❷

CA Web: <http://intranet.ca.state.gov/>
 CCD: https://cadata.ca.state.gov/ccd/ccd_logon.html
 MIS: <http://mis.ca.state.sbu/pages/home/agreement.aspx>

SharePoint Page

Prototype ▸ FAM Citations I Like It Tags & Notes

Prototype Project Team 1 External Links ▾ Search this site...

FAM Definitions

5 FAM 772 PRIVACY PRINCIPLES FOR FEDERAL WEBSITES ❷

5 FAM 772.1 Overall
 (CT:IM-107; 06-09-2009)
 a. Web site managers, Web page designers, and program offices must ensure that the privacy of personal information is protected.
 b. Federal Web sites must include a privacy policy statement, even if the site does not collect any information that results in creating a Privacy Act record.

Lists

A SharePoint list is similar to an Excel spreadsheet, but unlike a spreadsheet, SharePoint provides several predefined lists as well as the ability to build custom lists. Below are common predefined list in SharePoint:

List Type	When to Use	Benefits
Announcements	To display announcements on a site.	Expiration dates can be entered for announcements.
Links	To track hyperlinks.	Uses a Hyperlink column that automatically formats entered text as HTML anchor links.
Calendar	To track calendar items.	Can synchronize with Outlook.
Tasks	To track tasks.	Can synchronize with Outlook; tasks lists can be grouped with summary tasks.
Project Tasks	To track work items for a project.	Can display as a Gantt chart.
Issue Tracking	To track trouble tickets.	Works well with issues that have three states — open, closed, and resolved.

The standard list has two primary elements:

- Columns:** SharePoint lists are very similar to Excel spreadsheets in having columns and data. Creating a "new item" brings up a dialog that allows users to input column information easily.
- Views:** Users can select multiple views to view lists differently; views can also be set by individuals. Views can also be used to filtered how data is exported to Excel.

The screenshot shows a SharePoint List interface. At the top, there's a title bar "SharePoint List". Below it is a ribbon with "List Tools" containing "Items" and "List" tabs. The "Items" tab is active, showing options like "Standard View", "Datasheet View", "New Row", "Create View", "Modify View", "Create Column", "Navigate Up", "Manage Views", "Current View", "AllItems", "Default", "Public", and "Office 3". The "List" tab shows "Share & Track" and "Connect & Export" options. The main area displays a list with columns: "Title", "Date", and "Office". The "Title" column contains items #1 through #5. The "Date" column contains dates: 11/3/2015, 11/3/2015, 11/5/2015, 11/5/2015, and 11/4/2015. The "Office" column contains "Office", "Office 1", "Office 1", "Office 2", "Office 3", and "Office 3". Red boxes and numbers highlight the "Current View" dropdown (labeled 2) and the "Date" and "Office" columns (labeled 1).

Libraries

A SharePoint library is a specialized list that houses documents, photographs, & other media. Items in a library can be augmented with meta-data in columns (just as in lists). In addition to columns for meta-data, a SharePoint Library allows users to track the history of document revisions through versioning.

The standard list has two primary elements:

- ❶ **Columns:** Documents in a SharePoint library following best practices should be organized with meta-data in columns.
- ❷ **Views:** Users can select multiple views to view lists differently; views can also be set by individuals. This allows groups or individuals to sort a single list of documents to show only the documents they need.
- ❸ **Versioning:** Users check out and check in documents to make edits. These edits are tracked in the form of versions that can be viewed for a single document. Typically a library will limited versions to 10 per document.

The screenshot shows a SharePoint document library interface. The top ribbon includes 'Library Tools' with options like 'Create View' (marked with a red box and '2'). The main area displays a list of documents with columns for Name, Modified, Modified By, Office, and Project. The 'Office' and 'Project' columns are highlighted with red boxes and marked with '1'. A 'Version History' dialog box is open for the document 'Report_1', showing a table of versions (marked with a red box and '3').

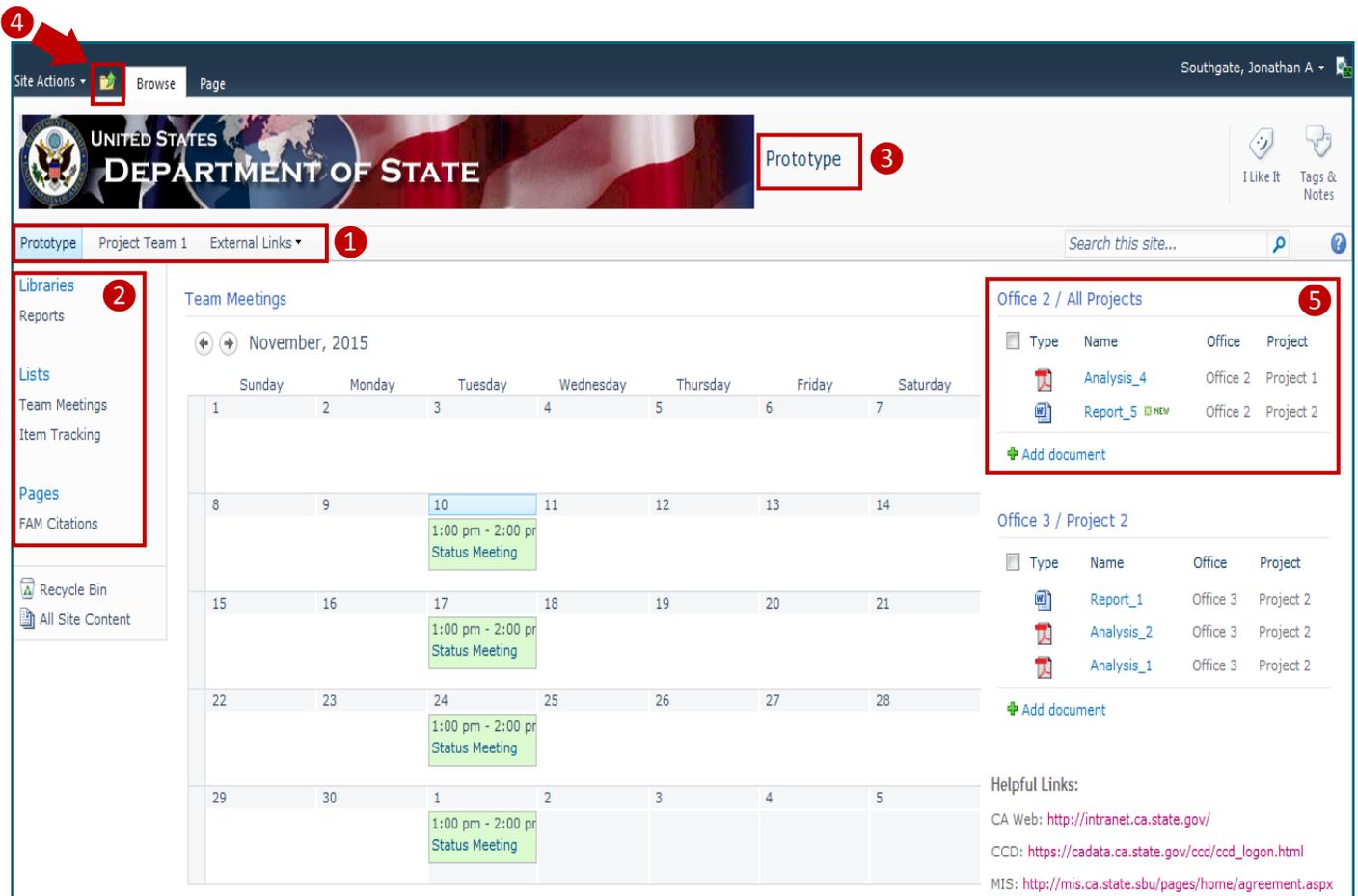
No.	Modified	Modified By	Size	Comments
3.0	11/5/2015 10:15 AM	Southgate, Jonathan A	21 KB	
2.0	11/5/2015 10:15 AM	Southgate, Jonathan A	21 KB	
1.0	11/5/2015 9:57 AM	Southgate, Jonathan A	24.6 KB	

Office	Project
Office 3	Project 2
Office 3	Project 2
Office 3	Project 1
Office 2	Project 1
Office 3	Project 2
Office 1	Project 1
Office 1	Project 1
Office 2	Project 2

SharePoint Navigation

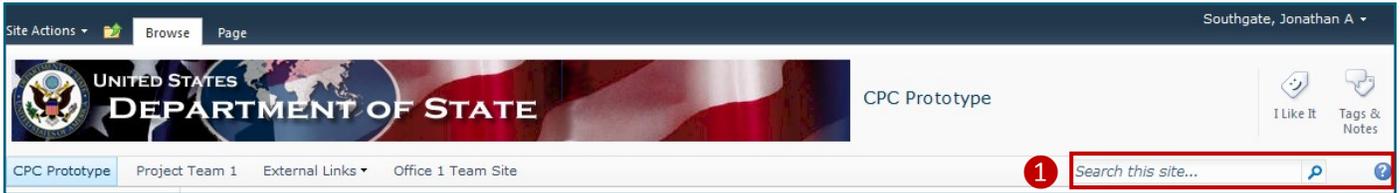
Navigating to the various elements of a SharePoint site can be done through five primary methods:

- ❶ **Navigation Bar:** Allows for navigation throughout various sub-sites and sites. Links on the navigation bar are manually selected to provide users useful links from anywhere within the site.
- ❷ **Navigation Menu:** Provides quick access to the current site’s document libraries, lists and pages. Only the content within the current site or sub-site is visible in this menu.
- ❸ **Header Address:** The complete path for the site a user is currently on is shown in the header pane. Users can click on sub-sites that are higher in the hierarchy to retrace their steps.
- ❹ **Navigate Up:** Users can click on the  icon at any point to navigate back to the parent site collection from whether they are currently located in the site.
- ❺ **Web-Parts:** Web-parts within the page provide users direct access to information in certain lists, libraries, or calendars. Users can interact with these items directly through the web-part.



SharePoint Search

Searching within a SharePoint site is very simple. In the top-right hand corner of every site or page, there is a search field **1 Search this site:**



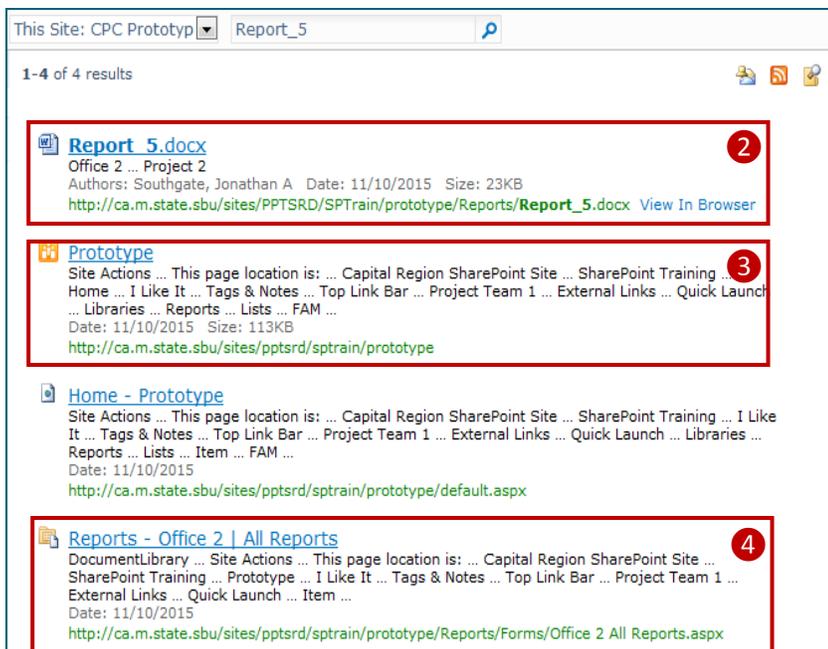
Keep in mind:

- The search scope for a field is of the current site and any sites or pages that are lower in the hierarchy.
- Search results are *security trimmed*, meaning only content that a user has permissions to will appear in the results.
- SharePoint can search for keywords within documents (except non-searchable PDFs).

1) Enter a keyword into the search field, then hit enter or click the magnifier:



2) SharePoint will return every instance of <Report_5> in the current site and all sub-sites:



The following was returned:

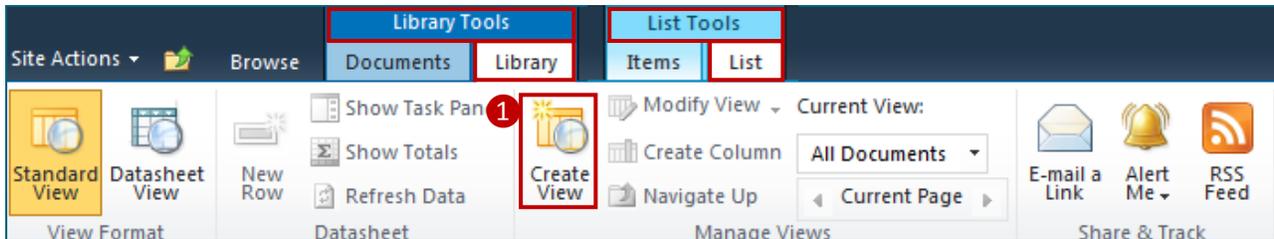
- 2 A document with the exact title.
- 3 A site with a document listed.
- 4 A view within the library where this document is found that shows the document.

Clicking on a link will direct you to that item.

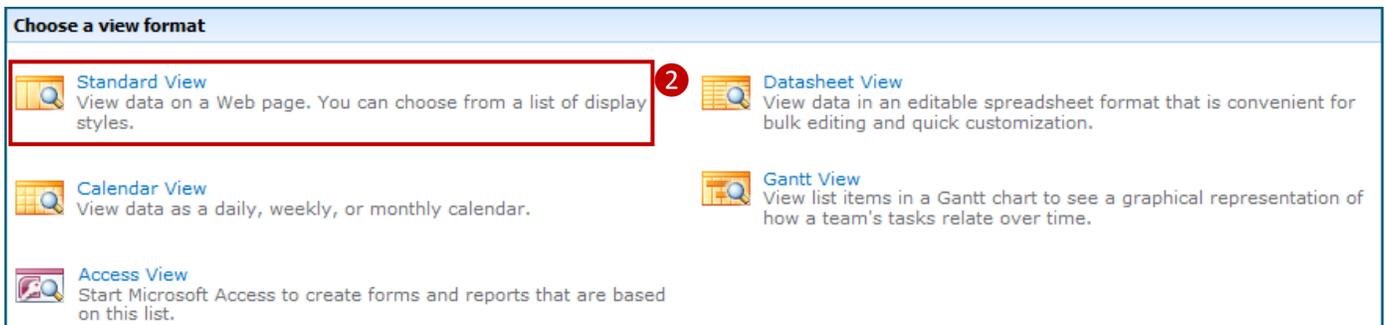
Creating Individual Views for Lists and Libraries

A helpful step to take when accessing a library or list for the first time is creating personal views (which are only accessible to you). Personal views give you the ability to view only documents pertinent to you.

1) To begin, navigate to **1 Library / List Tools > Library / List > Create View:**



2) In the window that appears, select the view that is most relevant to your needs, the most common is **2 Standard View:**



3) Complete the following sections of the next screen:

Name: Differentiate this view with a unique name that will help you remember what the view filters for (especially if you create multiple views for yourself).

Name

Type a name for this view of the document library. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

View Name:

Columns: Select which columns from the list or library will be visible in your personal view. You can also adjust the order that the columns are shown.

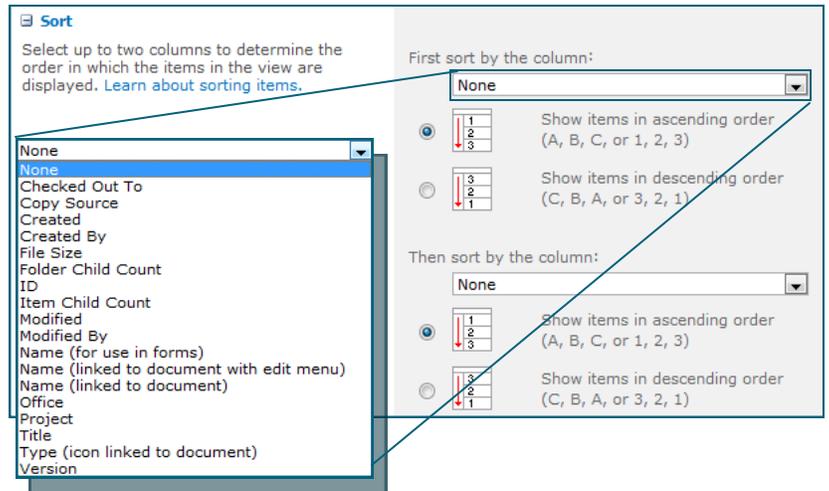
NOTE: This is very helpful for views for Excel export (if you only want certain columns exported).

Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the **Position from left** box.

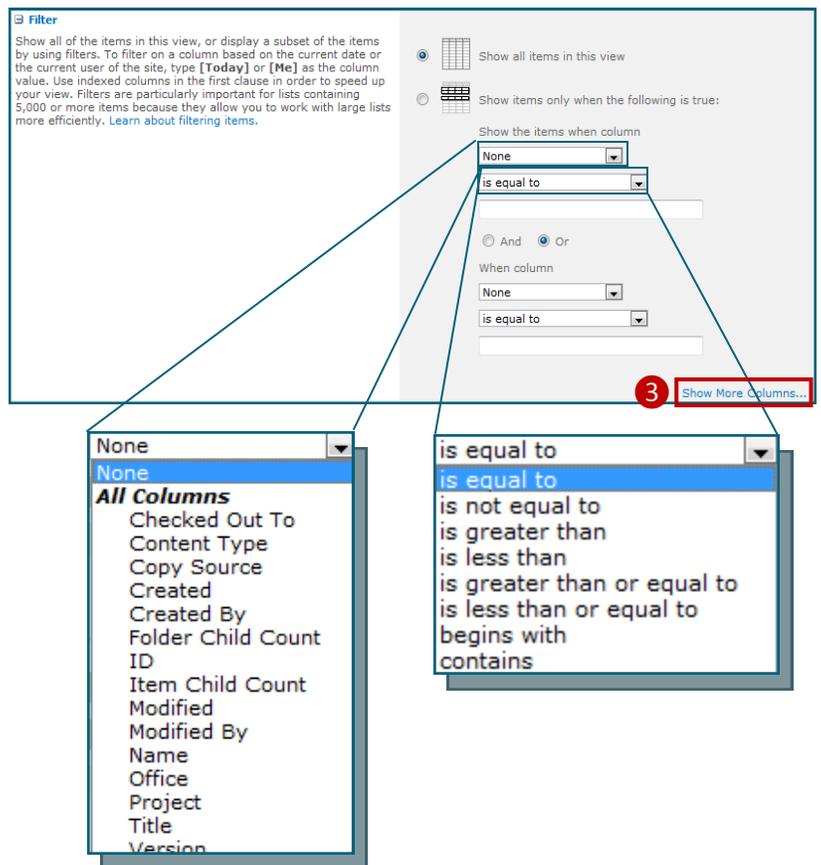
Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1
<input checked="" type="checkbox"/>	Name (linked to document with edit menu)	2
<input checked="" type="checkbox"/>	Modified	3
<input type="checkbox"/>	Modified By	4
<input checked="" type="checkbox"/>	Office	5
<input checked="" type="checkbox"/>	Project	6
<input type="checkbox"/>	Check In Comment	7
<input type="checkbox"/>	Checked Out To	8
<input type="checkbox"/>	Content Type	9
<input type="checkbox"/>	Copy Source	10

Sort: In this field, determine how items will be sorted by selecting a column (even those that will be hidden) and decide whether the information will be shown in ascending or descending order. You may select multiple columns to sort.



Filter: This is where you can filter results to show only the information you need. Select the second option and then filter by column. Items / rows are filtered to only show rows/items that have an entry in the column selected that matches either:

- A) A specific word (such as Office 2)
- B) Your name or a date.
- ◆ Type **[Me]** for the created by / modified columns to only display items that you created or modified (depending on the column selected)
- ◆ Type **[Date]** to only display rows/ items in a "date" column that match today's date.



If necessary, you may add additional columns to filter by selecting **Show More Columns**.

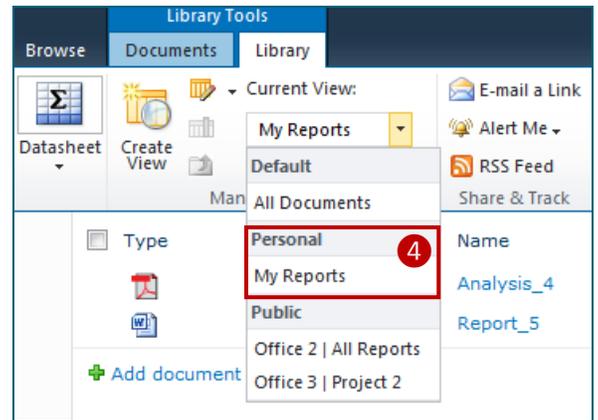
4) After inputting all necessary information, click **OK** to save your new personal view.



5) You may not view this list or library with your own **4 personal view** or those designated by your site developers.

NOTE: You can have multiple personal views that help you view the information in the list or library in different ways.

One of the most important ways views can help you is creating pre-defined lists ready to be downloaded to Excel.



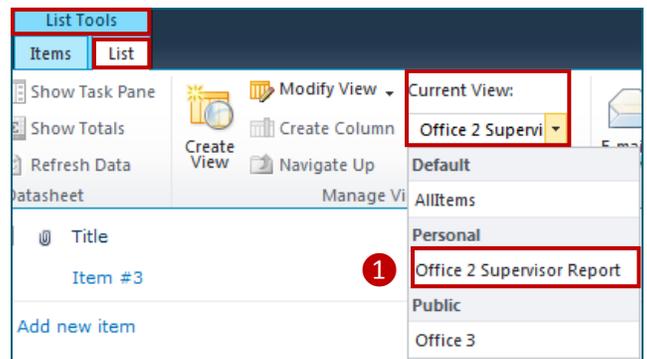
Working with Lists

Lists are critical elements of a SharePoint Site. This section will highlight the different ways you can interact with a SharePoint List.

Downloading List Data to Excel

SharePoint makes it easy for you to download information Excel for offline analysis. SharePoint views can be used to prepare data in a certain way to save time whenever you download similar data to Excel. Below is the procedure to download information from SharePoint to Excel:

1) From a SharePoint List, make sure you have a view prepared (if necessary). In this example, we have a personal view called 'Office 2 Supervisor Report' in the 'Item Tracking' List. This view filters by office for "office 2" and sorts items by date.



2) First, ensure the view is selected by navigating to **1 List Tools > List > Current View:**

3) Below is how the view effects the information displayed in the list:

Regular List				
	Title	Date	Office	
<input type="checkbox"/>	Item #1	11/3/2015	Office 1	
<input type="checkbox"/>	Item #2	11/3/2015	Office 1	
<input type="checkbox"/>	Item #3	11/5/2015	Office 2	
<input type="checkbox"/>	Item #4	11/5/2015	Office 3	
<input type="checkbox"/>	Item #5	11/4/2015	Office 3	

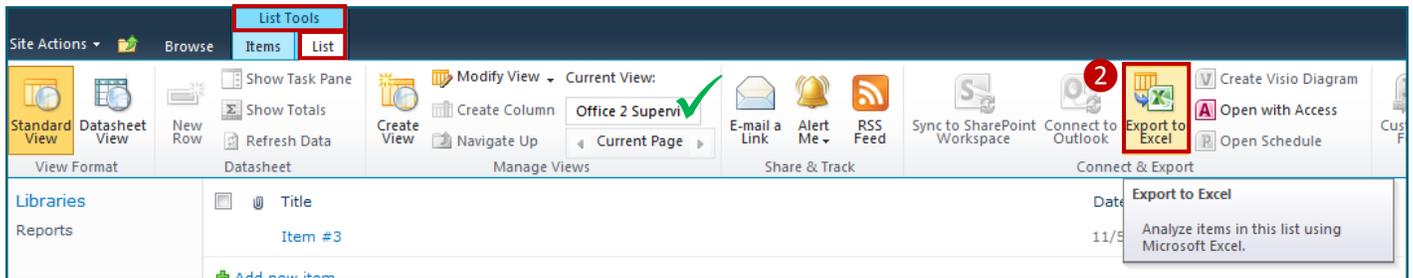


View: Office 2 Supervisor Report				
	Title	Date		
<input type="checkbox"/>	Item #3	11/5/2015		
+ Add new item				

Continues on the next page

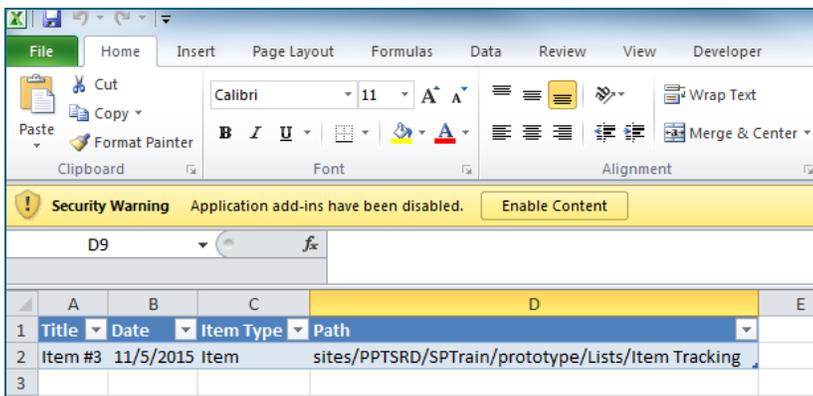
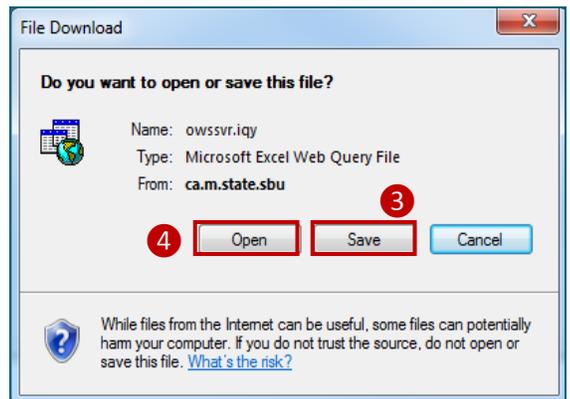


4) With the proper view selected, navigate to **2** List Tools > List > Export to Excel:



5) In the pop-up window that appears, click **3** Save to save a copy on your desktop, click **4** Open to open the file directly into Excel and save later.

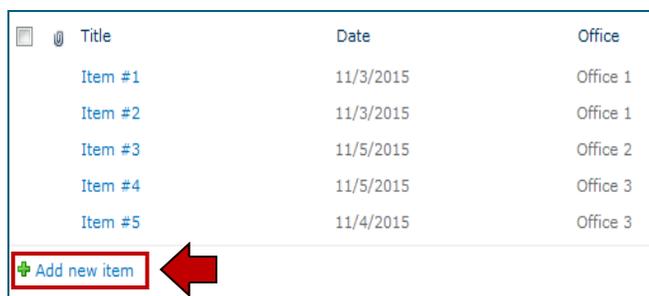
6) The information is now available in Excel format (only the columns in the view selected are downloaded to Excel):



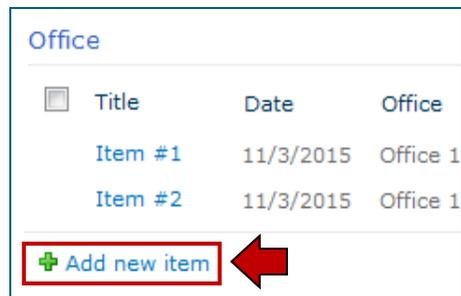
NOTE: The columns [Item Type] and [Path] are automatically downloaded with any SharePoint list and can be deleted.

Adding Items to a List

Adding an item to a list is an important function of any SharePoint site. You can input data to a list directly, by opening the list itself or through any web-part views that show the list's information:



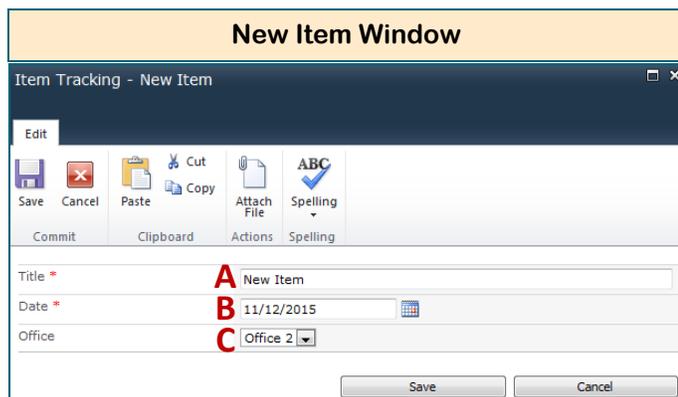
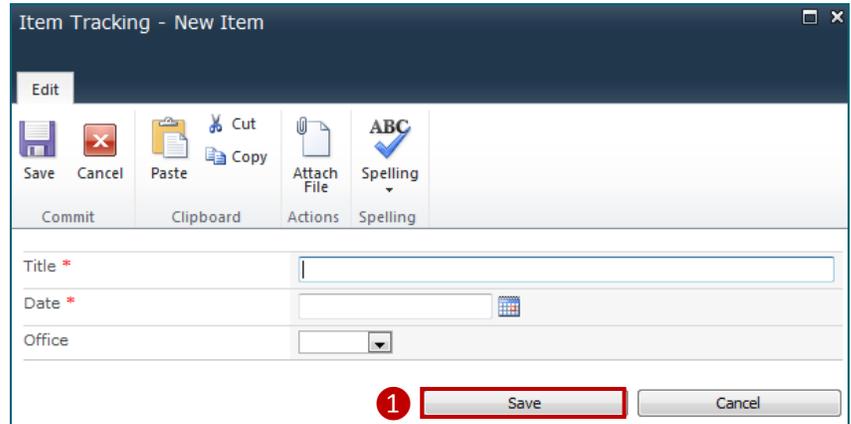
OR



1) Either way, once you click on **+ Add new item** the following window displays:

2) Complete all of the fields (especially the required fields, noted by the red asterisk). These fields correspond to the columns in the list.

3) Once all of the fields are complete, click **1 Save**. The item is now part of the list:

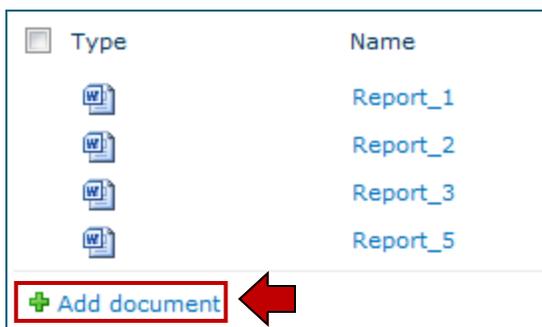


Working with Libraries

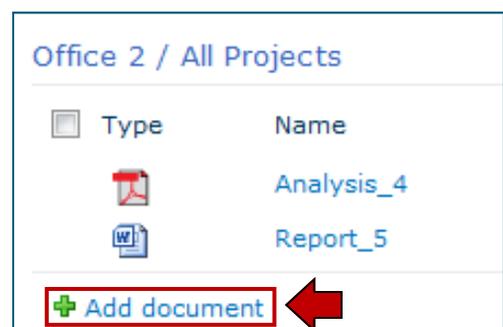
Document Libraries allow you to work collaboratively on documents. This section will highlight the different ways you can work with SharePoint Library.

Uploading a Document

You can add a document by opening a library directly or through any web-part views that show a library's content:



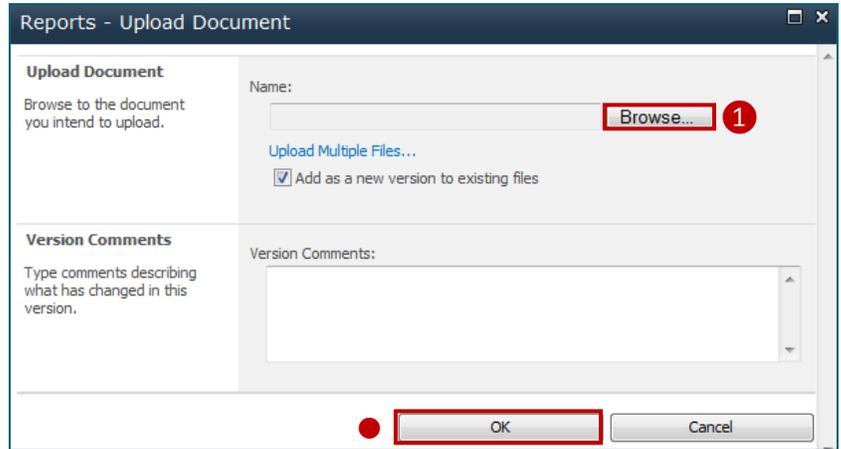
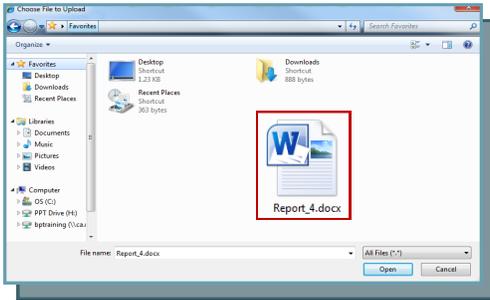
OR





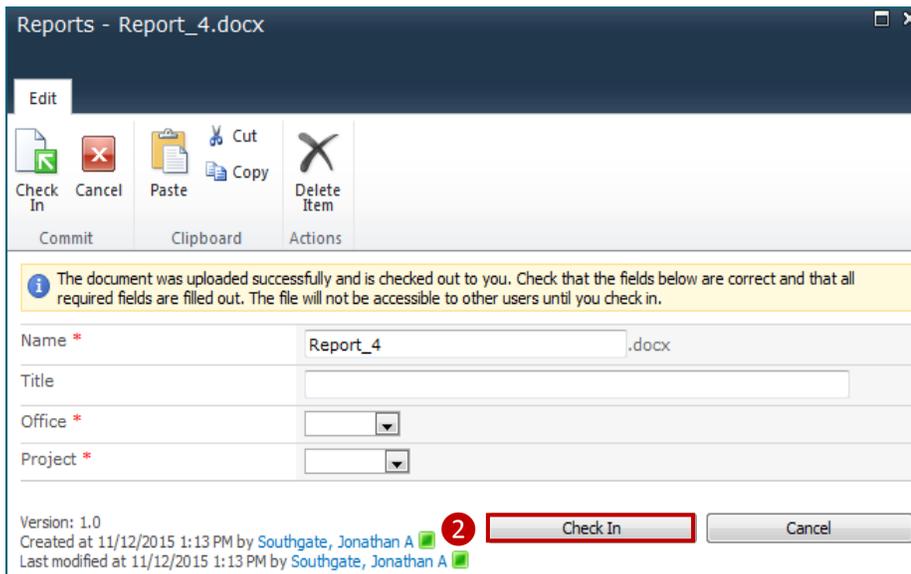
1) Either way, once you click on **+ Add document** the following window displays:

2) Click on **1 Browse** and navigate through your computer / shared drive to find the document:

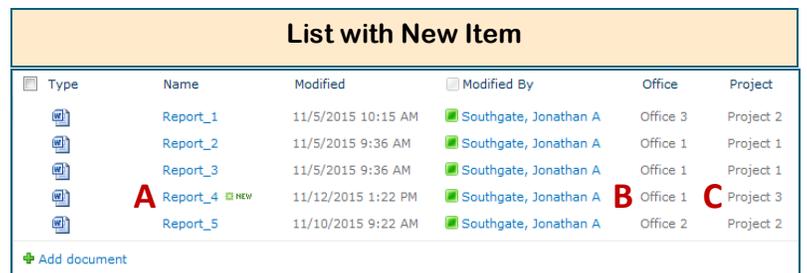
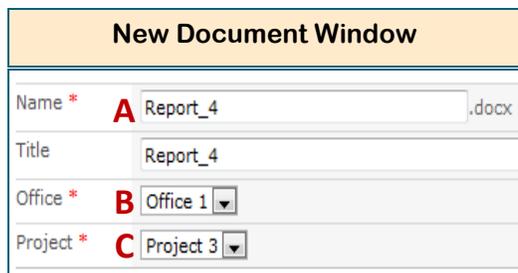


3) Once the document is found, click **2 OK**.

4) The following window opens:



Complete all of the fields (especially the ones that are marked with a red asterisk). These fields correspond to the columns in the library that act as meta-data tags, enabling easy filtering and sorting. After completing all of the fields, click on **2 Check In** to submit the document to the library.



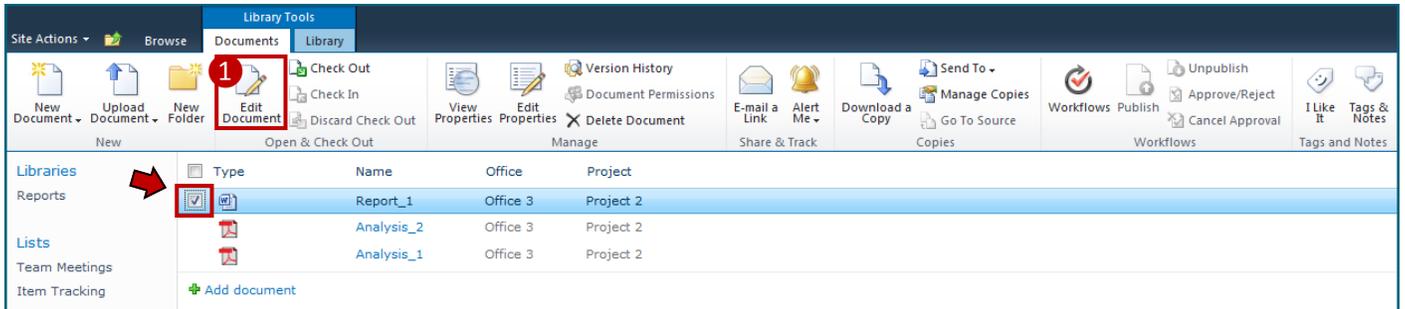
The document is now listed in the Document Library with all necessary tags.

Editing a Document

SharePoint allows multiple users to contribute to the same document(s) and track the changes made. The following example will look at editing a Word document in the "Reports" Library:

1) Open the "Reports" Library and select the document that needs to be edited, then click

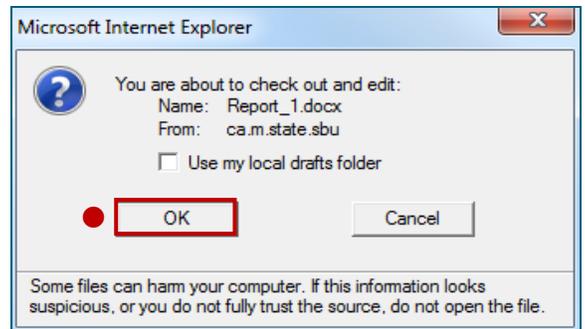
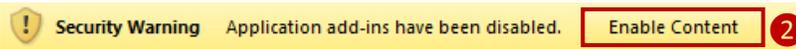
1 Edit Document:



2) In the pop-window that appears, click **OK**:

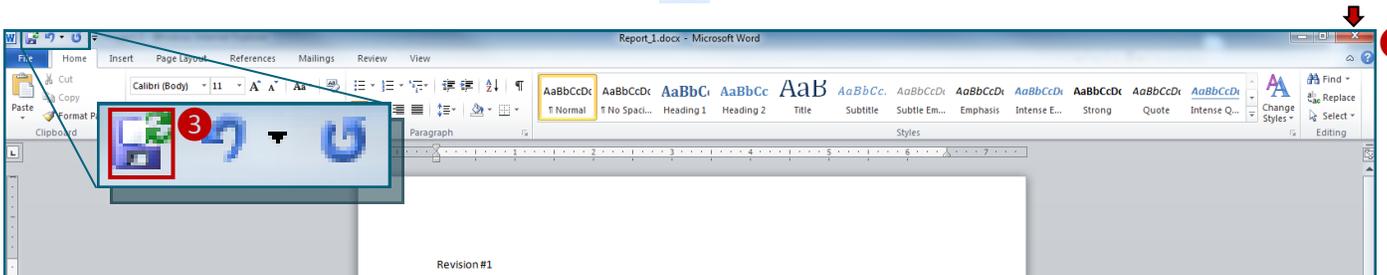
3) The document now opens in the Microsoft application it opens in (Word = docx, Excel = xlsx, etc).

4) Make sure to **2 Enable Content:**

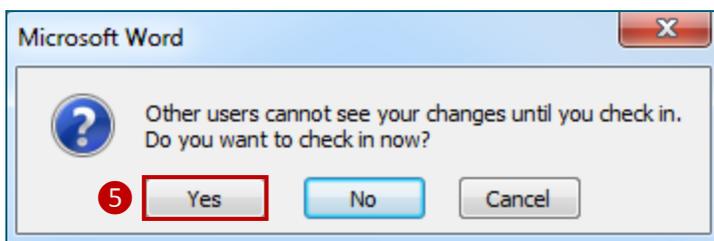


5) Complete all the necessary edits or changes to the document.

6) When the document is ready, click on the **3** icon at the top left-hand corner of the document:



7) Next close out of the window by clicking on the **4** button. The following window will appear:



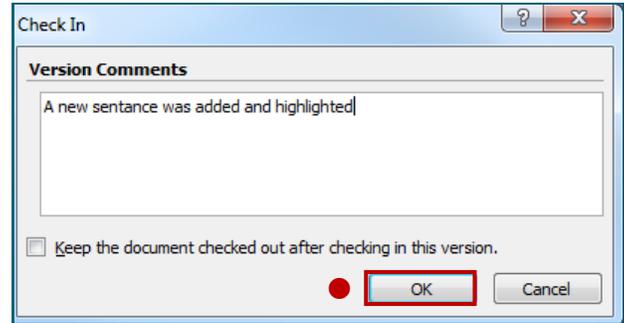
8) Click on **5 YES**.

Continues on the next page



9) In the window that appears, enter any notes about the edits made in this version. Once the comments are entered, click **OK**:

10) The document is now "checked-in" to SharePoint.



Checked-In: Documents that are "checked-in" are open to any user for editing.

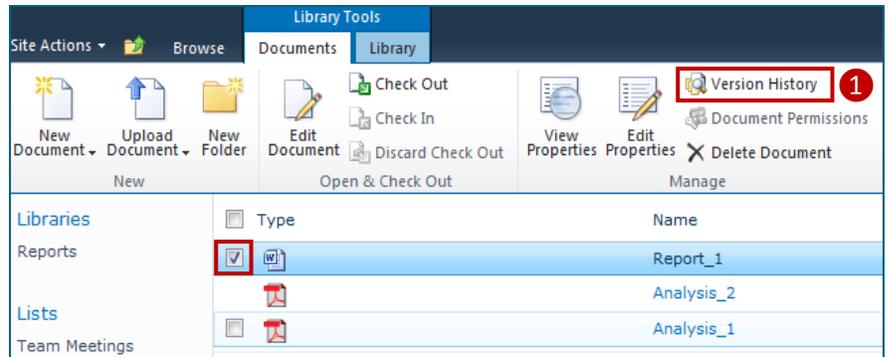
Checked-Out: Document that are "checked-out" are available to only the user that checked the document out. While checked-out, all other users are locked out of editing the document.

It is very important to remember to check in documents when you no longer need to edit them.

Document Versioning

To check a documents versioning history and view previous iterations of a document, follow these steps:

1) Select the document from the Library, then click **Version History**:



2) A pop-up with the versioning history for this document displays:

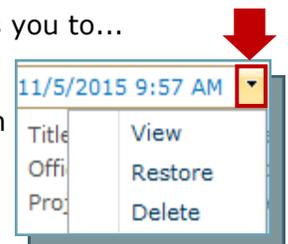
No.	Modified	Modified By	Size	Comments
4.0	11/12/2015 2:37 PM	Southgate, Jonathan A	21.1 KB	A new sentence was added and highlighted
3.0	11/5/2015 10:15 AM	Southgate, Jonathan A	21 KB	
2.0	11/5/2015 10:15 AM	Southgate, Jonathan A	21 KB	
1.0	11/5/2015 9:57 AM	Southgate, Jonathan A	24.6 KB	

Title: Novemeber Report
 Office: Office 3
 Project: Project 2

- Every iteration of the document will be displayed in this list, including who modifying the document and when.

• Clicking on the arrow next to the **modified date** of a version allows you to...

- ⇒ **view** the version.
- ⇒ **restore** that version to the library.
- ⇒ **delete** the version.





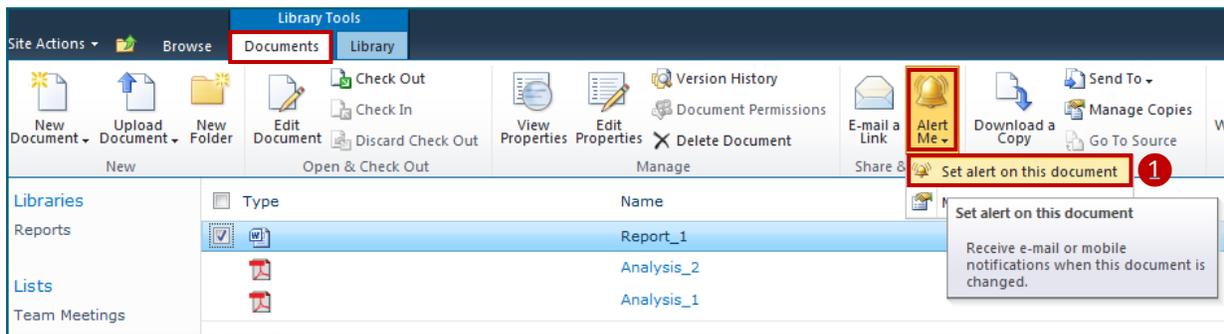
Creating Alerts

SharePoint Alerts can be set up to notify you when changes are made to certain documents or entire libraries / lists. Below is the procedure to create these alerts.

To set up an alert for...

A single document:

Select the document then navigate to **1 Documents > Alert Me > Set alert on this document:**



A list/library:

Navigate to **2 Library > Alert Me > Set alert on this library / list:**

Reports: Report_1.docx - New Alert

Alert Title
Enter the title for this alert. This is included in the subject of the notification sent for this alert.
Reports: Report_1.docx

Delivery Method
Specify how you want the alerts delivered.
Send me alerts by:
 E-mail SouthgateJA@state.gov
 Text Message (SMS) _____
 Send URL in text message (SMS)

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.
Send me an alert when:
 Anything changes
 Someone else changes a document
 Someone else changes a document created by me
 Someone else changes a document last modified by me
 Someone changes an item that appears in the following view:
Office 3 | Project 2

When to Send Alerts
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)
 Send notification immediately
 Send a daily summary
 Send a weekly summary
Time:
Thursday 4:00 PM

- Complete the form that appears, then click **OK**
- Depending on the options selected, you will receive emails like the one below whenever changes are made to this document:

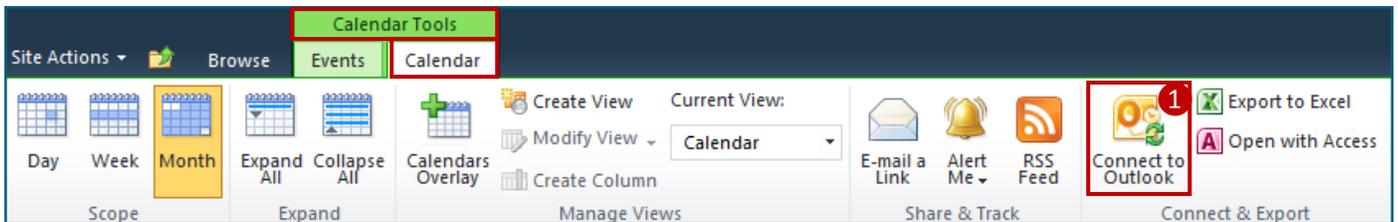
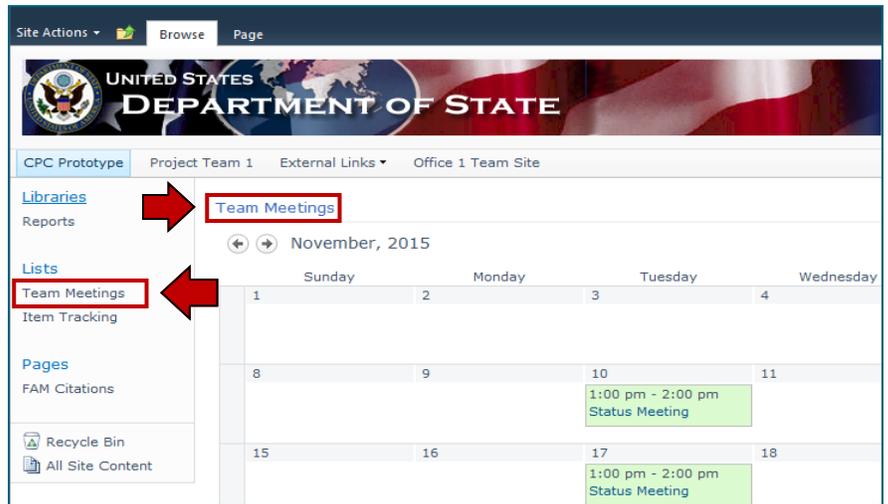
SharePoint
Report_1.docx has been changed
[Modify my alert settings](#) | [View Report_1.docx](#) | [View Reports](#) | [Mobile View](#)

Title:	November Report
Document ID Value:	2A7F4403357-587-1
Document ID:	2A7F4403357-587-1
Office:	Office 3
Project:	Project 2
Checked Out To:	Southgate, Jonathan A Edited
set Modified 11/12/2015 4:16 PM by Southgate, Jonathan A	

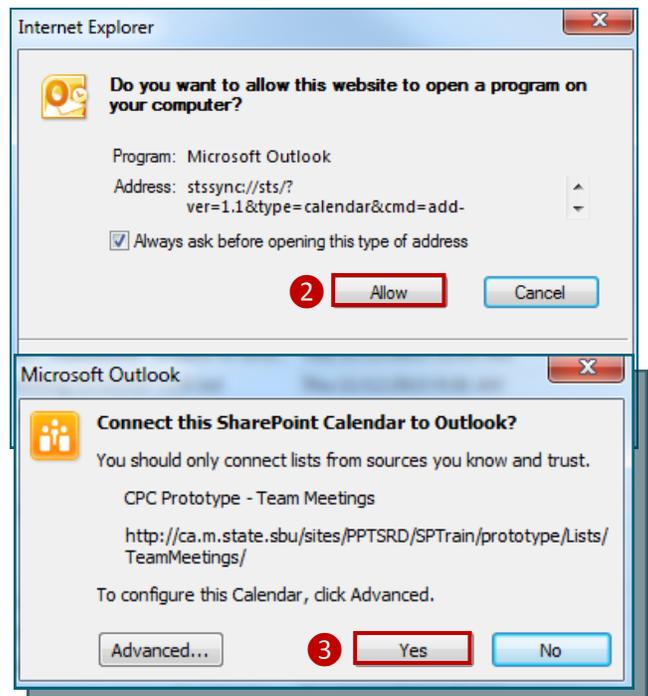
Connecting SharePoint Calendars to Outlook

You can connect your Outlook Calendar to a SharePoint calendar to always see the most up-to-date information from a SharePoint calendar displayed in your Outlook calendar. Below is the procedure to do this:

- 1) Navigate to a SharePoint calendar by selecting the name from the side bar, or clicking on the title of a Web-Part.
- 2) Either way, you will be brought to the calendar page.
- 3) From here, navigate to **1** Calendar Tools > Calendar > Connect to Outlook



- 4) In the window that appears, click on **2** Allow.
- 5) In the next window, select **Allow** as well.
- 6) In the third window, click on **3** Yes.



The SharePoint calendar is now connected to Outlook.



Outlook

Outlook Calendar View (November 2015)

Day	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Nov 1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	
29	30	Dec 1	2	3	4	5	

SharePoint

SharePoint Calendar View (November 2015)

Day	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	
29	30	1	2	3	4	5	

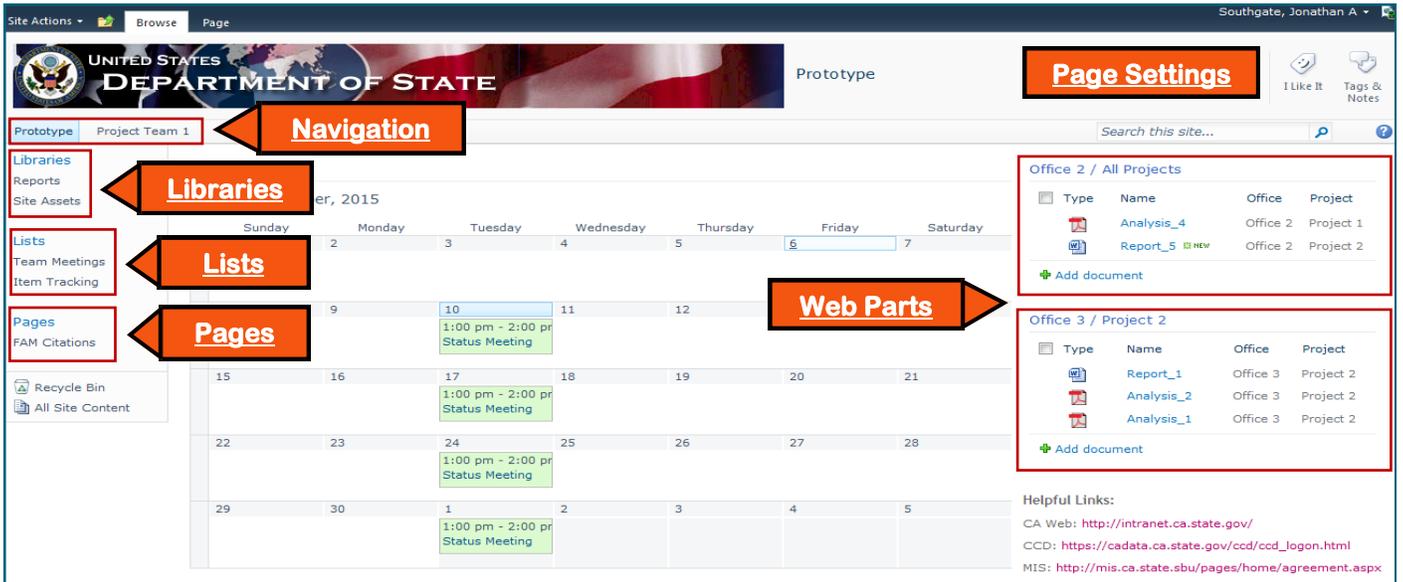


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Site Designers have the ability to create and modify the structure and content of SharePoint sites. This guide will provide a detailed walkthrough of how to create and maintain standard elements of a SharePoint site.

Click on a section in the SharePoint site below to jump to that section of the handout, or continue directly to view the walkthrough of every section:



SharePoint Lists

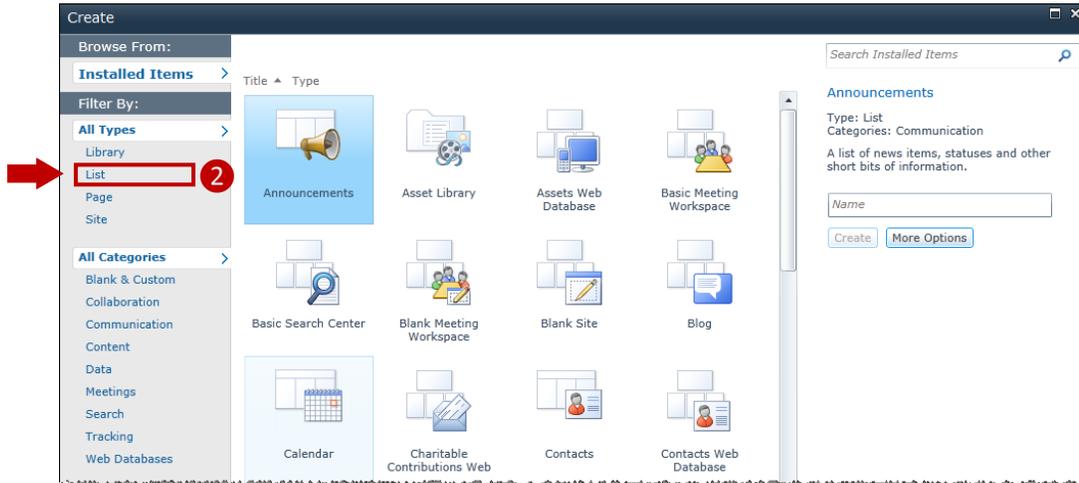
Lists are the backbone of a SharePoint site. It is good practice to develop a site's list (and library) structure before developing pages and layouts. The following is a step-by-step guide on how to create and maintain a SharePoint list:

Create a New List

1.0) From a site, navigate to **1 Site Actions > More Options**

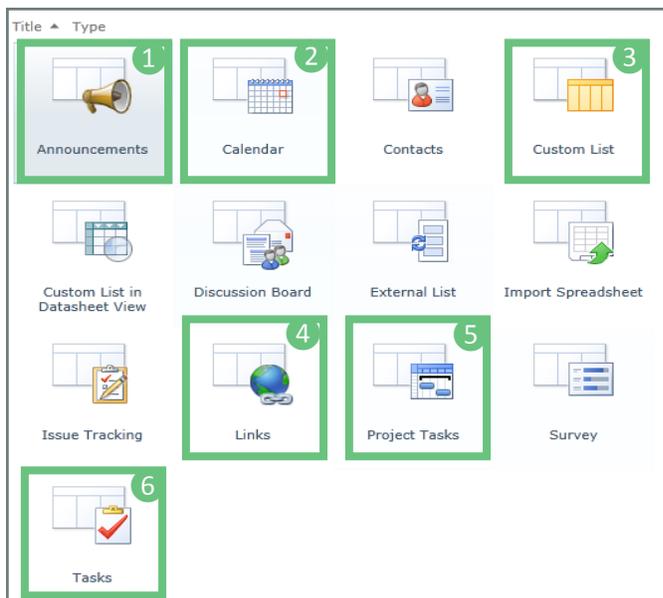


1.1) In the window that opens, select **2** List from the side menu:



1.2) A list of list options is shown, select the option that meets the needs of the list you are creating.

The most common list types in CA SharePoint sites are highlighted below:



1 Announcements: A pre-defined list that allows for easy entry of announcements that can be displayed throughout the site. Expiration dates can also be added to take announcements down after a certain date.

2 Calendar: A pre-defined list that allows for easy entry of dates and events. Enter calendar events in a list format, then view the information in a calendar format. Information entered into this list can also be synchronized with Outlook.

3 Custom List: A blank template that allows a user to define the columns as needed.

4 Links: A pre-defined list that provides an easy template to track hyperlinks. Contains a hyperlink column that auto formats HTML anchor links that are entered as text.

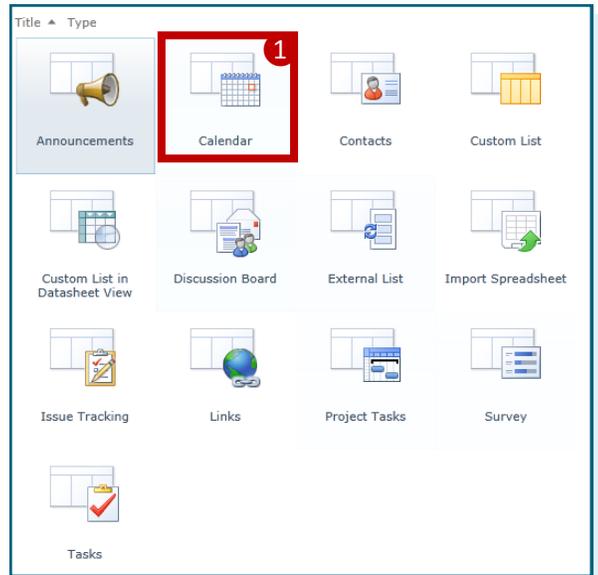
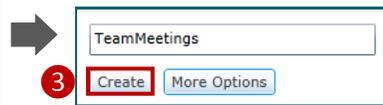
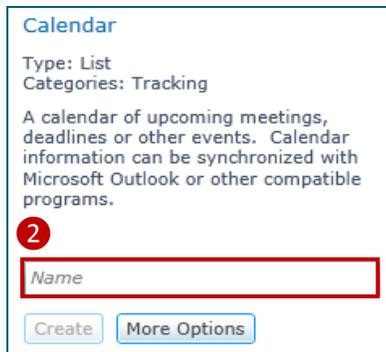
5 Project Tasks: A pre-defined list that allows for easy tracking of project tasks and work items. This tool is especially helpful since it can display task information as a Gantt chart.

6 Tasks: A pre-defined list that allows for easy tracking of tasks. These tasks can be synchronized with Outlook tasks as well.

1.3) This guide will walk through the creation of a **2**Calendar List and a **3**Custom List.

Calendar List

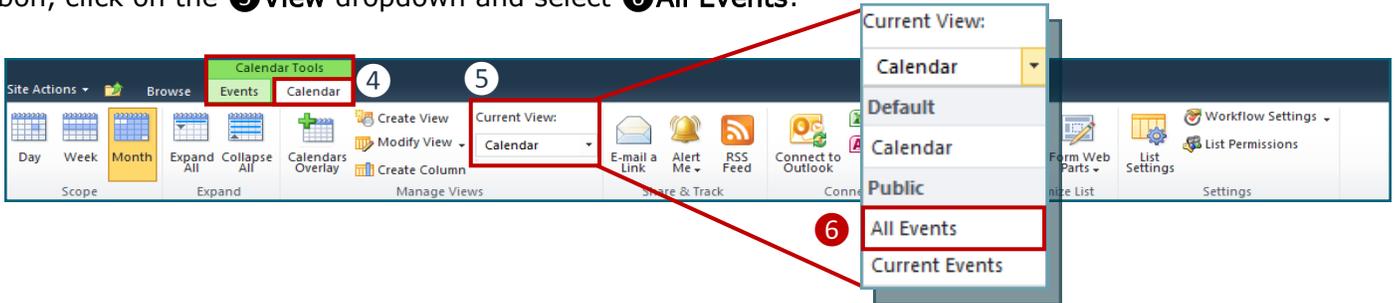
- 1.4) Select **1** Calendar from the list selection menu.
- 1.5) Enter a name for the calendar into the **2** Name field.
- 1.6) Click on **3** Create after inputting a title.



1.7) The new calendar list will appear in the default View for a Calendar List (*Calendar*):



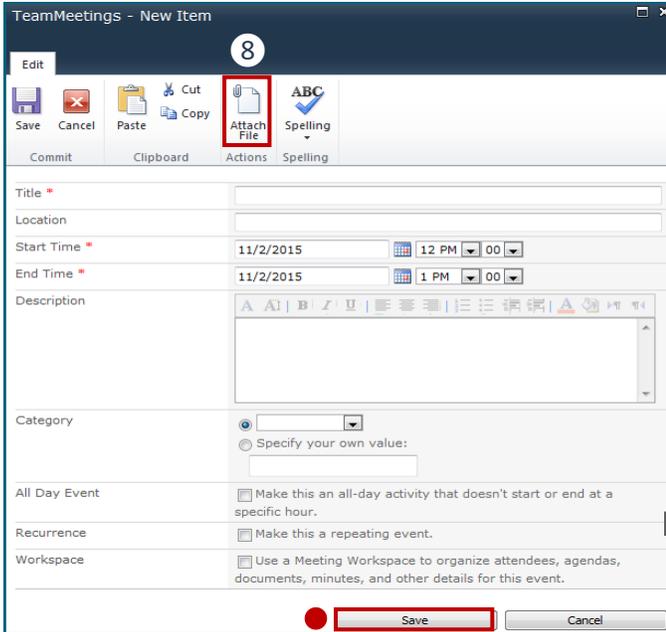
1.8) To facilitate easy event entry, navigate to **4** Calendar Tools > Calendar. Once in the Calendar ribbon, click on the **5** View dropdown and select **6** All Events:



1.9) The list will now display in the **Standard View**:

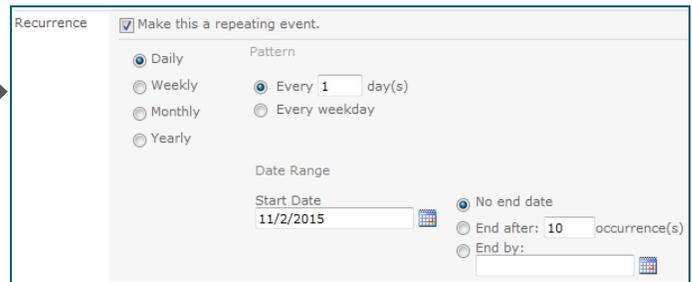


1.10) Click on **7** [+ Add new event](#) at the bottom of the list to create a new event. After clicking, this pop-up window appears:



The following fields are required:

- (A) Title: type in the field
 - (B) Start Time: type or select from calendar pop-up
 - (C) End Time: type or select from calendar pop-up
- Other important fields that are not required:
- (D) Location: type in the field
 - (E) Description: type in the field
 - (F) Recurrence: If selected, these additional fields are required:



Additional selections:

- **8** **Attach File** gives you the option to attach a file from your desktop such as a meeting agenda, relevant materials, etc.
- **(G) Category** allows you to categorize an event according to standard event types, or by creating a unique category:



- **(H) All Day Event** removes the option to choose start and end times.
- **(I) Workspace** prompts you to create a meeting workspace.

1.11) After making your selections, click **● Save**.

To learn how to create a workspace, continue. If not [click here](#) (page 30) to move to Custom Lists.

Meeting Workspaces

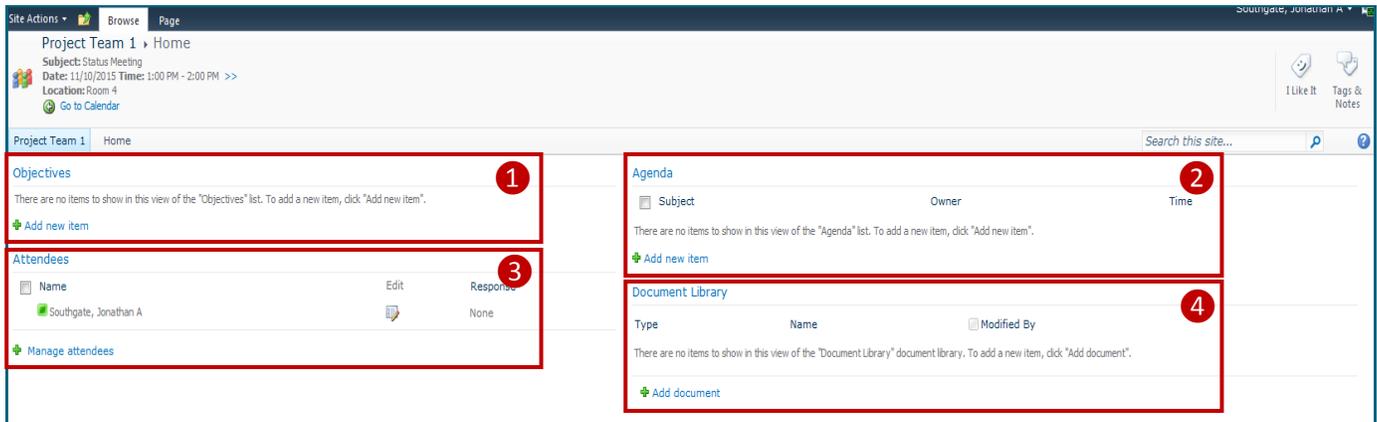
If you elected to create a workspace in the calendar creation menu, the following screen appears:

- Type in the **Title** and **URL Address** for this new site.
- Use the same permission as the parent site.
- Click ●OK. A template selection screen appears:

1.12) Select the Meeting Template you wish to use; **Basic Meeting Workspace** is a very good option.

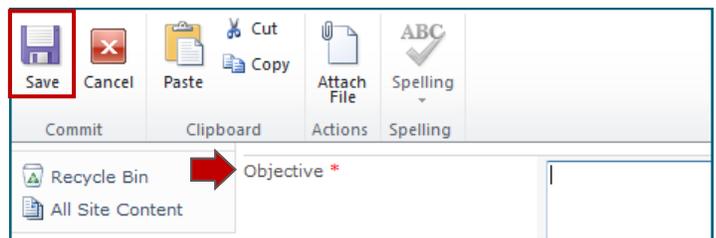
1.13) Clicking ●OK will load the new meeting workspace:

1.14) The Basic Meeting Workspace has four sections:



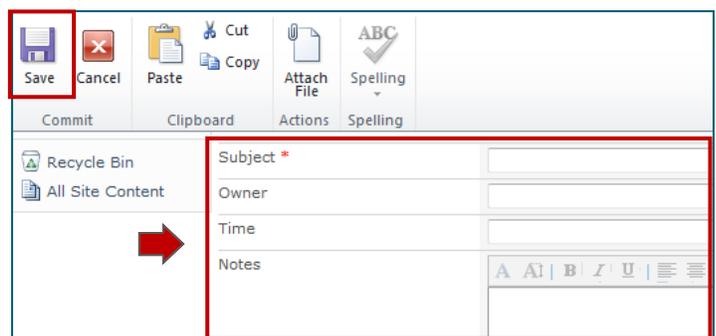
1 Objectives: To add objectives to this list, click on **Add new item**.

In the window that appears, enter an objective, then click **Save**:



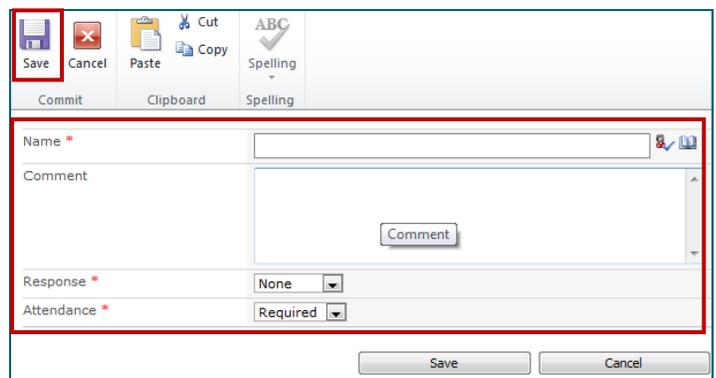
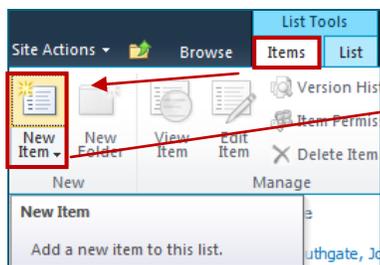
2 Agenda: To add a new item to the agenda, click on **Add new item**.

In the window that appears, complete the required fields, then click **Save**:



3 Attendees: To add meeting attendees, click on **Manage attendees**.

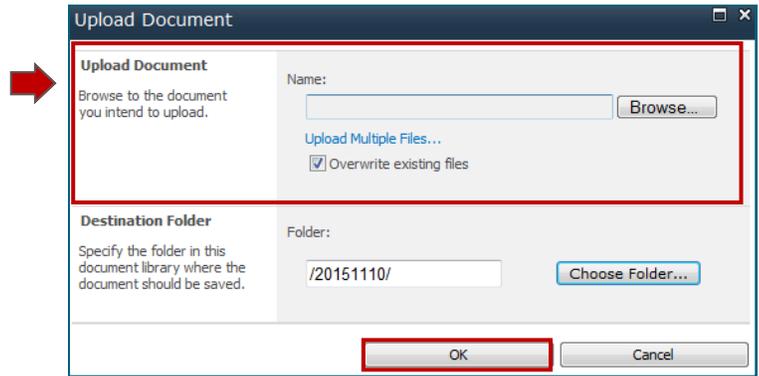
In the window that appears, navigate to **List Tools > Items > New Item**:



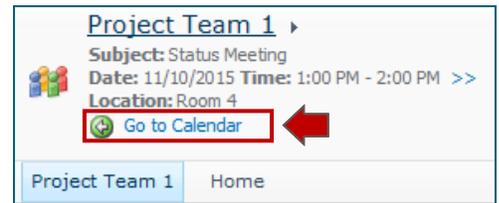
Complete the required fields, then click **Save**.

***Note:** the **Name** field is connected to the GAL, so the named entered must match a name in the GAL.

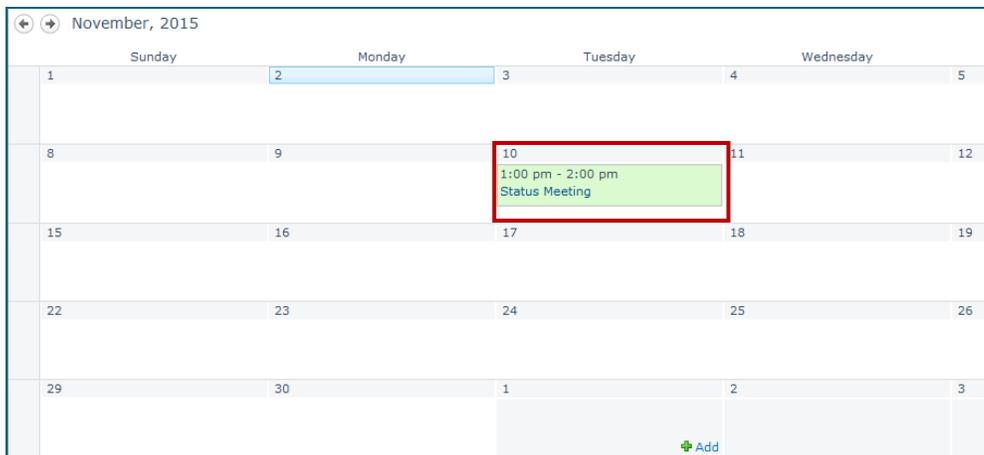
4 Document Library: To add documents to the meeting space, click on **Add document**. In the window that appears, browse for the document to upload, then click **OK**:



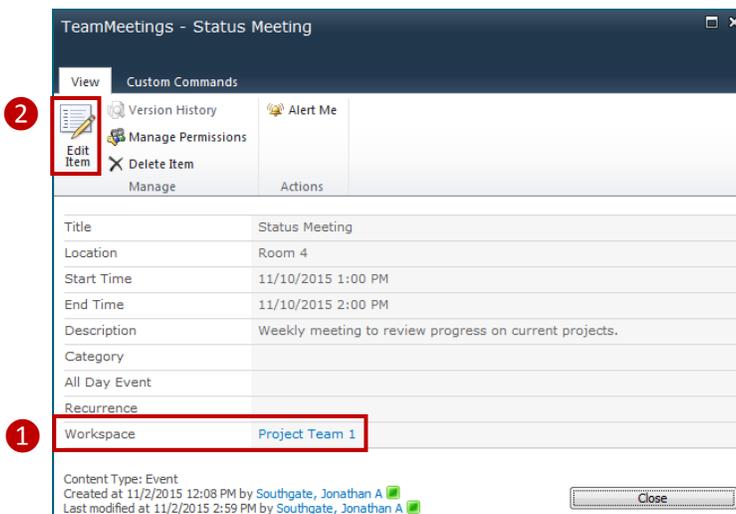
1.15) To return to the Calendar List View, click on **Go to Calendar** under the event information in the upper left-hand corner of the workspace:



1.16) The event that was created is now viewable in the calendar view:



1.17) Double click on the green event box to bring up the event details window:

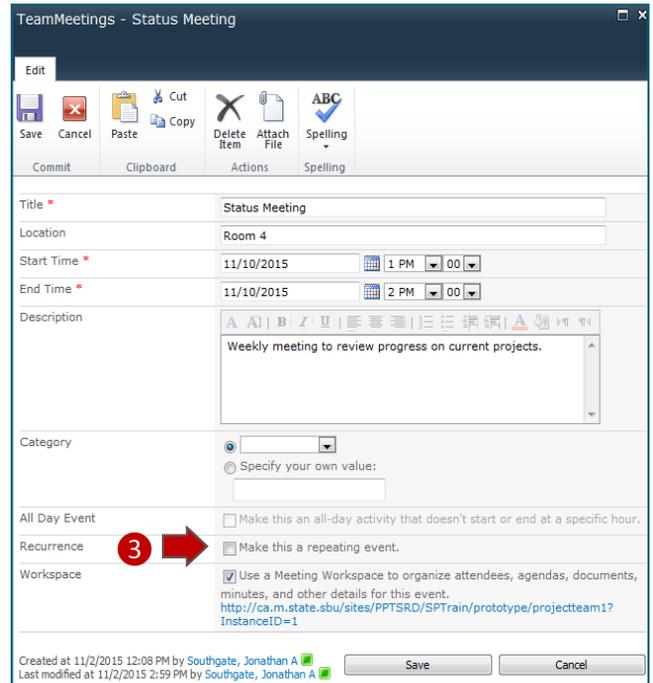
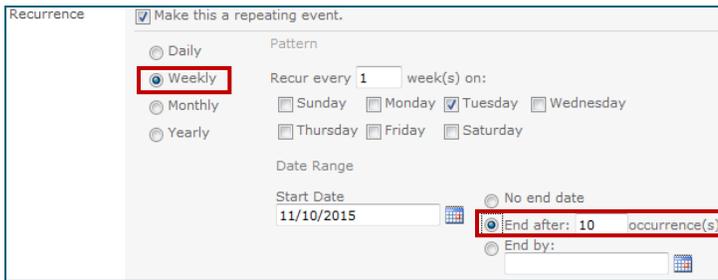


- This screen displays all of the information for the event.
- Users can click on the 1 Workspace link to go to the meeting workspace for the event.
- If changes are needed, click on the 2 Edit Item button (only available to Site designers).

1.18) In this example, we will click on the **Edit Item** button to make a change to the event:

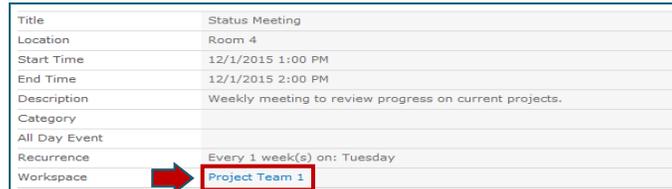
1.19) Check the box next to the **3** Recurrence option.

- This will bring up options specific to recurrence:
- In this example, we will make the event occur weekly, for 10 iterations:

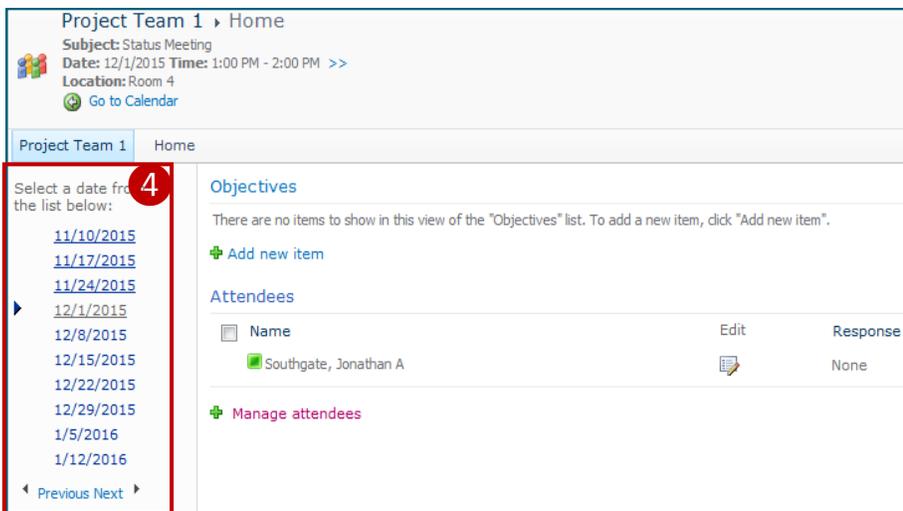


1.20) If you return to the main calendar, you will see the event repeat on every Tuesday:

1.21) Click on any of the events in the series, then click on the **Workspace** link in the details window:



1.22) Returning to the project workspace, you will notice a new **4** sidebar with every date in the series:



- Clicking on each date in the series will display a new work area.
- Each iteration of the series has unique Objectives, Agendas, Attendees, & Documents!
- **Best Practice:** Use the recurrence feature for ongoing meetings to track agendas and documents for previous meetings.

Custom List

- 1.23) Select **1** Custom List from the list selection menu.
- 1.24) Enter a name for the calendar into the **2** Name field.
- 1.25) Click on **3** Create after inputting a title.

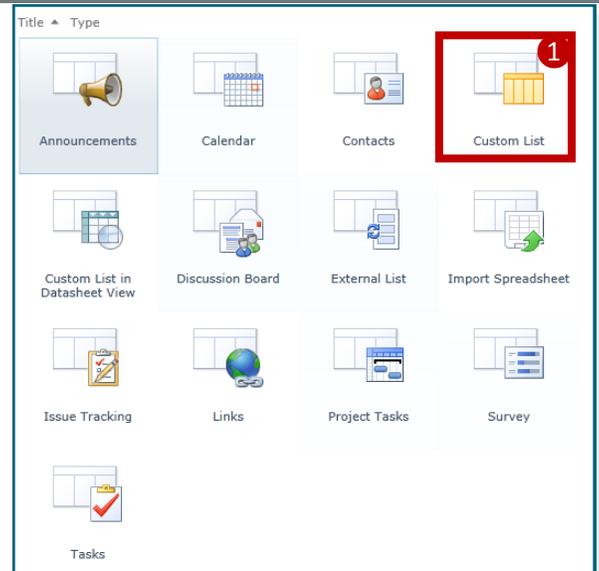
Custom List

Type: List
Categories: Blank & Custom

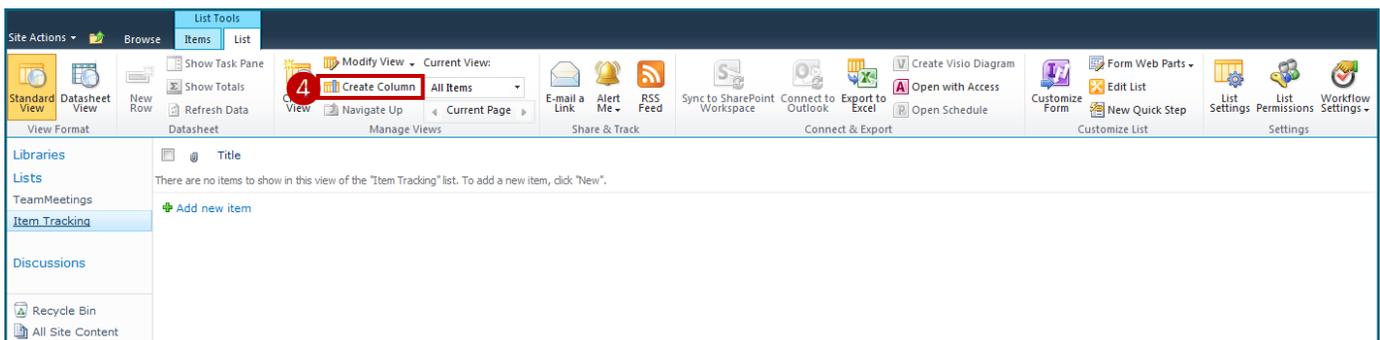
A blank list to which you can add your own columns and views. Use this if none of the built-in list types are similar to the list you want to make.

2

3



1.26) The new list will appear in the default **View** for a List (*All Items*):



1.27) The first step in list construction is to create columns.

1.28) Click on **4** Create Column. A column creation window appears, complete the form as follows:

- Type a name for the column in the **5** Title field.
- Select the type of data the column will contain from the **6** list of options.
- Depending on the type of list selected, different options will be available in the **7** Additional Column Settings section.
- Select options that make sense for the type of information that will be in the column.
- Once complete, click **OK**.

Create Column

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

5 Column name:

6 The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (checkbox)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- External Data
- Managed Metadata

Additional Column Settings

Specify detailed options for the type of information you selected.

7 Require that this column contains information

- Yes No
- Enforce unique values: Yes No
- Maximum number of characters:
- Default value: Text Calculated Value
- Add to default view

Column Validation

1.29) In the *Item Tracking* list example, we will create two columns in addition to "title":

Column #1: Date

Column name:

Currency (\$, ¥, €)
 Date and Time
 Lookup (information already on this site)
 Yes/No (check box)
 Person or Group

Require that this column contains information:
 Yes No

Enforce unique values:
 Yes No

Date and Time Format:
 Date Only Date & Time

Default value:
 (None)
 Today's Date

 Enter date in M/D/YYYY format.
 Calculated Value:

Note the **Date** specific options that become available in the **Additional Column Settings** section

Column #2: Office

Column name:

Single line of text
 Multiple lines of text
 Choice (menu to choose from)
 Number (1, 1.0, 100)
 Currency (\$, ¥, €)

Require that this column contains information:
 Yes No

Enforce unique values:
 Yes No

Type each choice on a separate line:

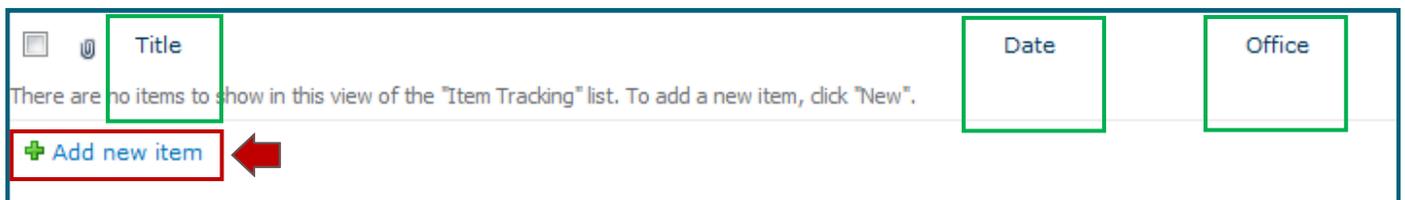
Display choices using:
 Drop-Down Menu
 Radio Buttons
 Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:
 Yes No

Default value:
 Choice Calculated Value

Note the **Choice** specific options that become available in the **Additional Column Settings** section

1.30) Returning to the list, you will notice that the list will have three columns:



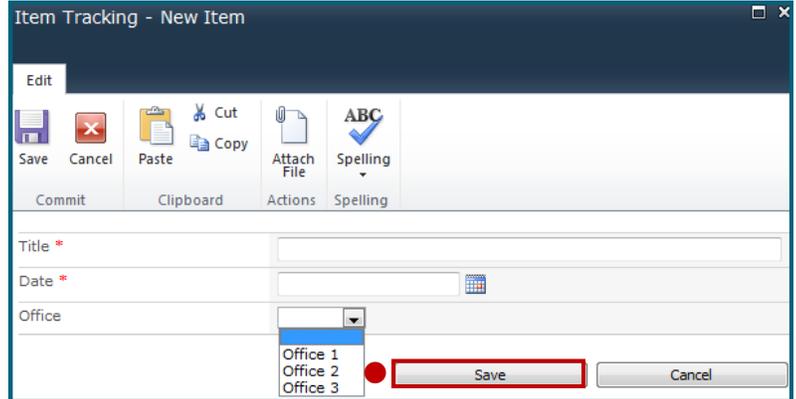
1.31) To add data to the list, click on the **+ Add new event** button at the bottom of the list.

Continues on the next page



1.32) After clicking the **add new data** button the following pop-up window appears:

- Every column you created is listed in this form.
- Those that require data are marked with a red asterisk.
- After inputting/selecting data for each field, click on **Save**.
- The data is now in the list:



Title *	Item #1
Date *	11/3/2015
Office	Office 1

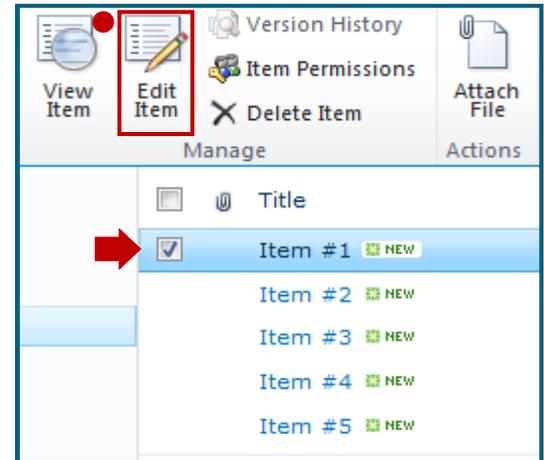


Title	Date	Office
Item #1	11/3/2015	Office 1

+ Add new items

1.33) If you need to edit an item in a list, follow these steps:

1. Check the box of the row that needs editing.
2. Then, click on **Edit Item**
3. The pop-up window for the item appears, make the required edits and click **Save**.



Views

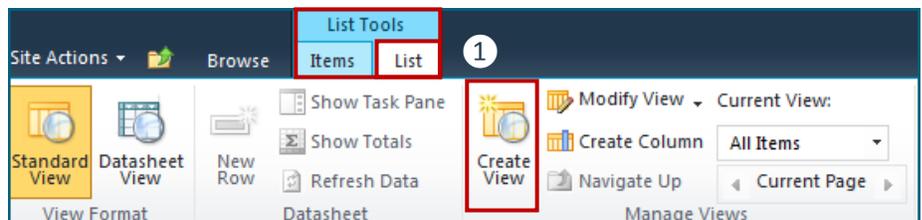
1.34) After creating columns and adding items, **Site designers** should create views for the list.

- **Public views** are similar to **Personal Views** that were discussed in Module 1, but can be accessed by groups of users.

1.35) In this example, we will create a view for *Office 3* so they only see the items assigned to their office. There are many different ways you can use views, but the process of creating them is the same.

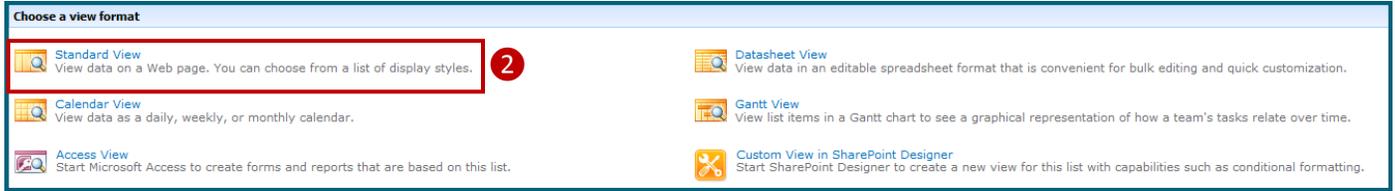
1.36) To begin, navigate to

1 List Tools > List > Create View on the ribbon:



1.37) There are several options available on the next window; for this example, we will choose the

2 Standard View:



1.38) Next, the **Create View** screen is shown, customize the view by completing the following sections:

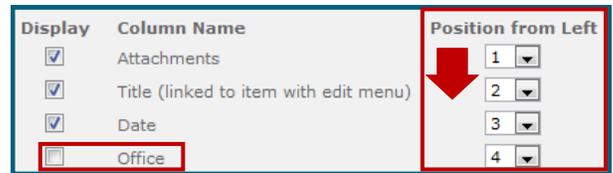
Name: Assign a name to this view (typically the group the view is for, or what it filters for, in this case "Office3":



Audience: Select "Create a Public View" when creating a view as a **Site designer**:

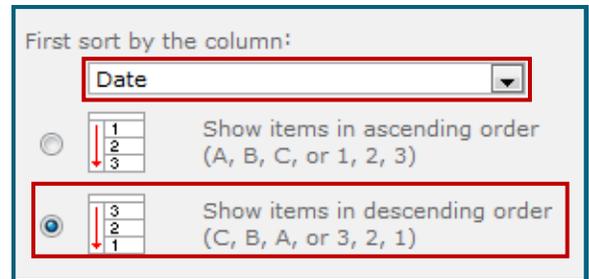


Columns: Select which columns will be visible in this view. In this example, the *Office* column does not need to display since all entries will come from the same office, *Office 3*:

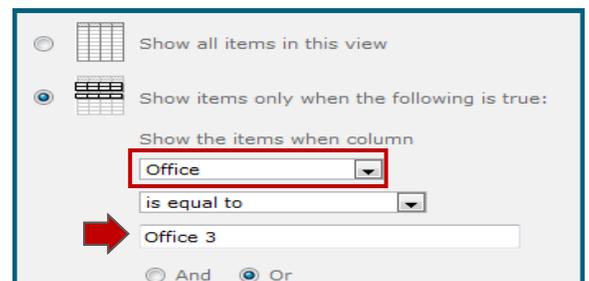


NOTE: You can also change the order that columns are displayed by rearranging the numbers on the right-hand side.

Sort: You have the option to sort rows by up to two columns. In this example we will sort by date in descending order so newer items are displayed before older items:



Filter: This is where you filter the results to include only Office 3 by selecting **Office** from the column selection drop-down and then typing in the value "Office 3":



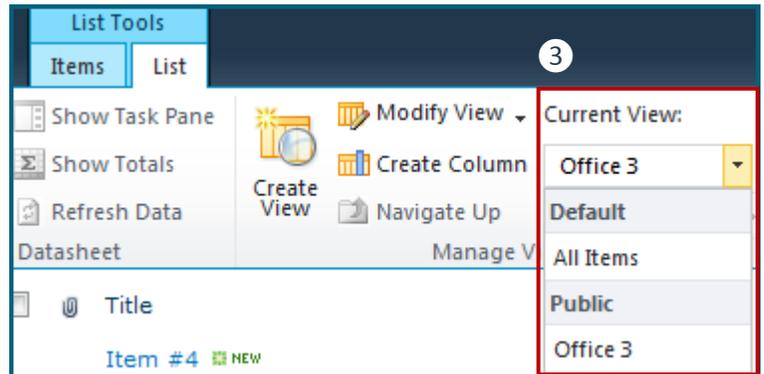
1.39) After inputting all of the information, click **OK** to build the view.

1.40) The new view now only displays Items that were assigned to *Office 3*; the items are shown in descending order; and the Office column is no longer visible (*but still present in the background*):

Title	Date
Item #4 NEW	11/5/2015
Item #5 NEW	11/4/2015

[+ Add new item](#)

1.41) To change a view, navigate to **3 List > Current View** and select a different view from the drop-down menu:



1.42) Every view for the list will be shown in this drop-down menu (including your own personal views)

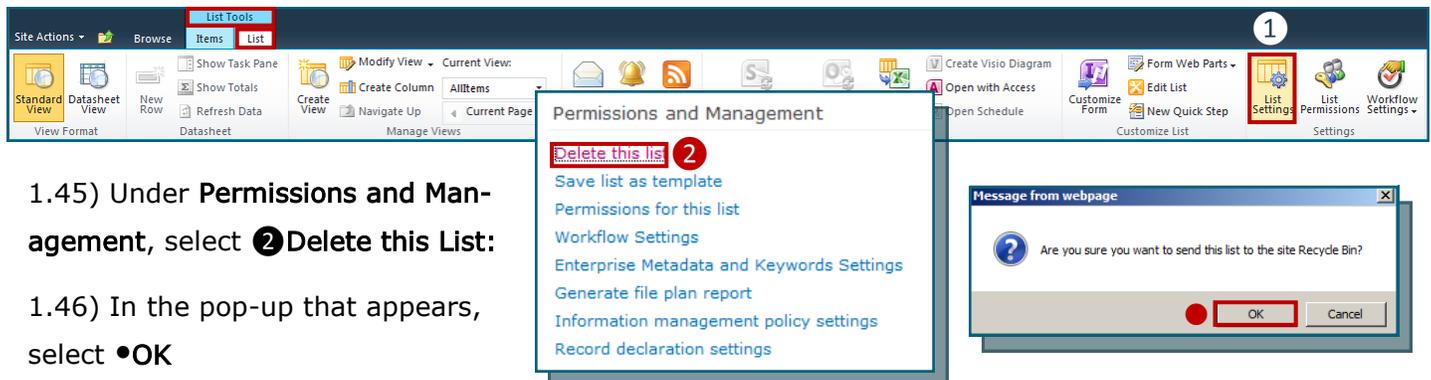
1.43) Every view has a unique URL that will bring users directly to the view. Copy the URL from the URL bar when you have the view selected for the list. You should see the view's title at the end of the address: <http://ca.m.state.sbu/sites/PPTS RD/SPTrain/prototype/Lists/Item%20Tracking/Office%203.aspx>

NOTE: Any spaces in the title of a list or view will be display in the URL as "%20" (highlighted in blue) **Use the URL link in team sites or other pages where you want members of a specific team to see this list through their unique view.**

Delete a List

In order to delete a list, follow these steps...

1.44) While in a list, navigate to **1 List Tools > List > List Settings**



1.45) Under **Permissions and Management**, select **2 Delete this List:**

1.46) In the pop-up that appears, select **•OK**

SharePoint Libraries

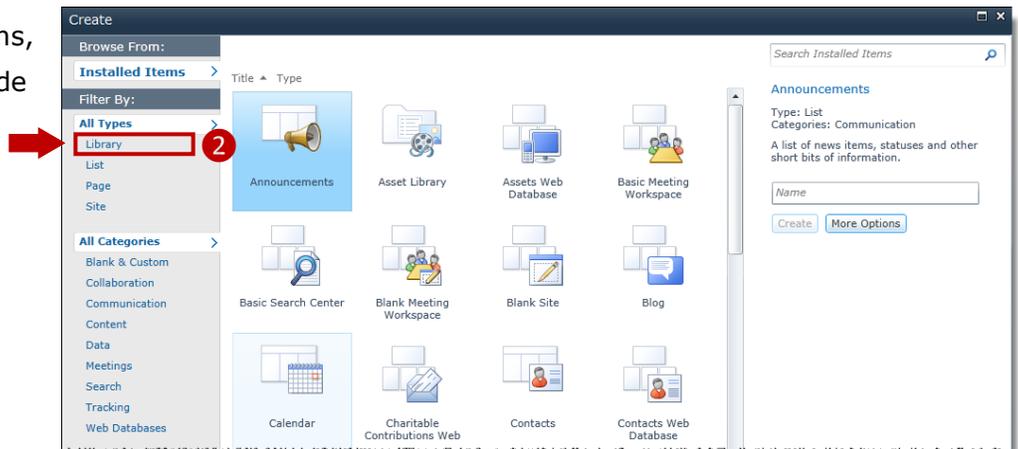
Libraries are specialized lists that enable easy sharing of documents in a SharePoint site. The following is a step-by-step guide on how to create and maintain a SharePoint library:

Create a New Library

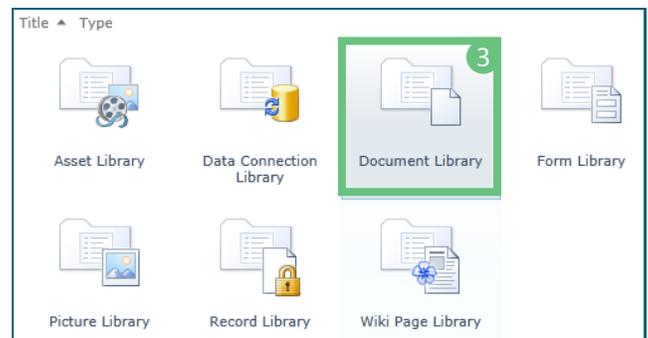
2.0) From a site, navigate to **1 Site Actions > More Options**



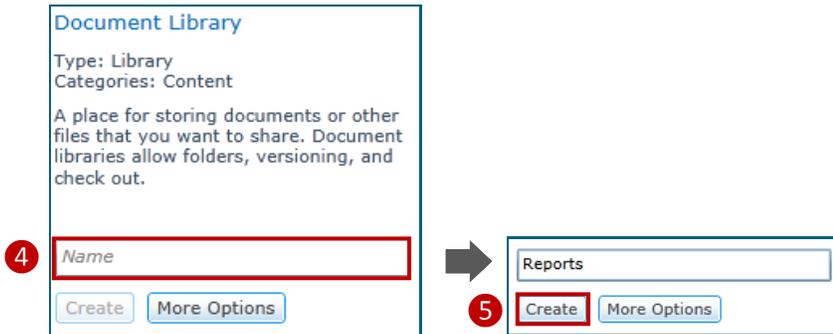
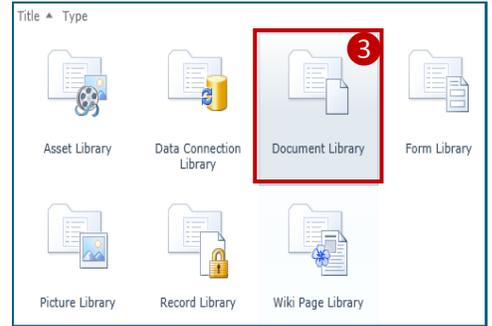
2.1) In the window that opens, select **2 Library** from the side menu:



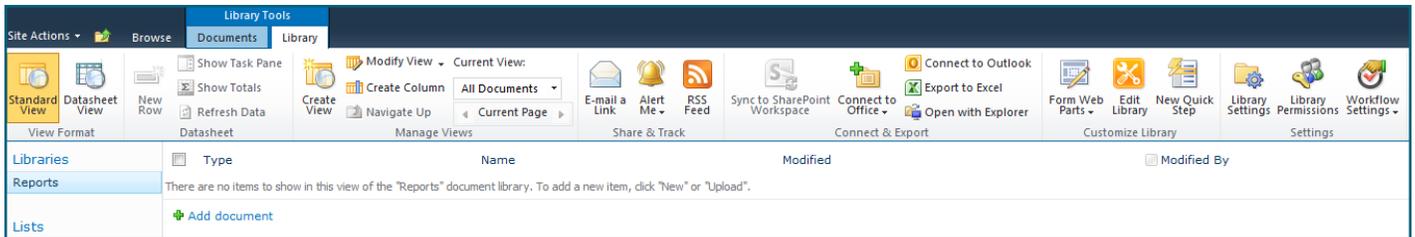
2.2) A list of library options is shown, the most common and best option for the majority of libraries is the **3 Document Library** option:



- 2.3) Select **3** Document Library from the library selection menu.
- 2.4) Enter a name for the library into the **4** Name field.
- 2.5) Click on **5** Create after inputting a title.



2.6) The new library will appear in the default **Standard View** for a Library List:



Modifying a Library

2.7) Libraries are specialized lists, so the same procedure for creating list columns apply to libraries. You can review these steps by clicking [here](#) (pg.30). Consider the following best practice when creating columns for your document libraries:

It is **highly** suggested that users **do not** create folder based document libraries. Instead, create columns that correspond to sub-folders and create "folder-like" views that filter data into various categories.

Below is an example:

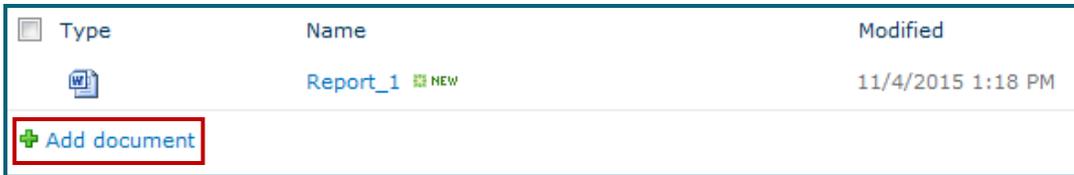
Folder Structure	Flat View Structure (Best Practice)								
	<table border="1"> <thead> <tr> <th>Type</th> <th>Name</th> <th>Modified</th> <th>Modified By</th> </tr> </thead> <tbody> <tr> <td></td> <td>Report_1 NEW</td> <td>11/4/2015 1:18 PM</td> <td></td> </tr> </tbody> </table>	Type	Name	Modified	Modified By		Report_1 NEW	11/4/2015 1:18 PM	
Type	Name	Modified	Modified By						
	Report_1 NEW	11/4/2015 1:18 PM							
<p>This structure quickly becomes difficult to manage in SharePoint. It also limits the search functionality.</p>	<p>Assigning columns to a document allows all documents to be housed on the same list, but at the same time allows for filtering by view.</p> <p>For example, the view "Office 2 - Project 2" would only show documents that were assigned "Office 2" <u>and</u> "Project 2", acting as a virtual folder selection.</p>								

Adding Documents

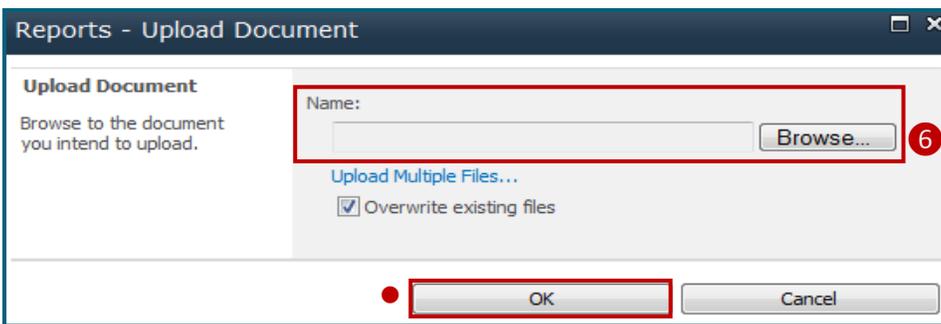
2.8) Once the library is built, you can begin the initial importation of documents. There are two primary methods for uploading these *initial* documents.

Method 1: Uploading Documents through SharePoint

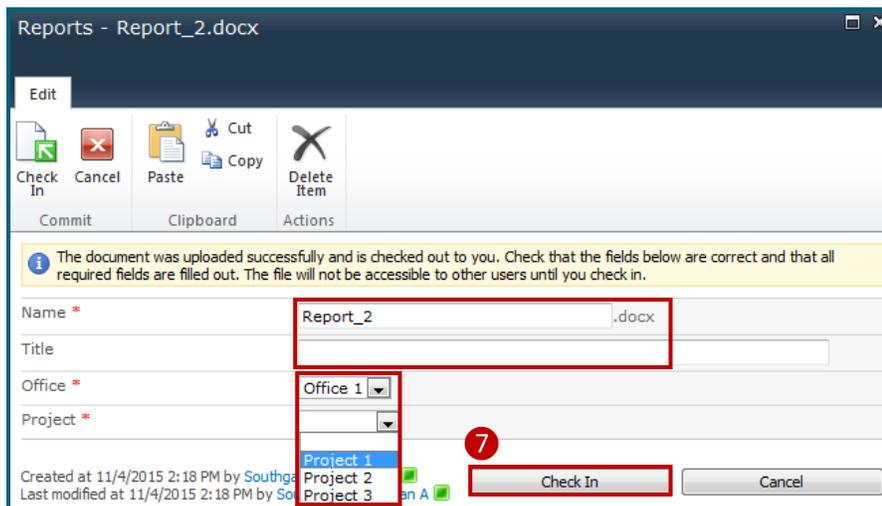
2.9) Begin by clicking on the **+ Add document** button at the bottom of the library list:



2.10) The **Upload Document** window appears, click on **6** browse to search for the document on your computer, then click **OK**:



2.11) Next, enter the metadata for the document (these fields are connected to the columns you created). If a column was marked as required, a red asterisk will appear next to that entry. Complete the fields as required and click **7** Check In:



The document is now in the document library:



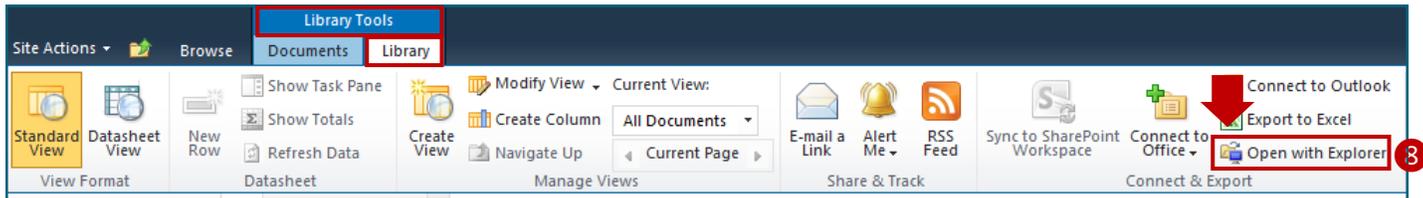
Continues on the next page



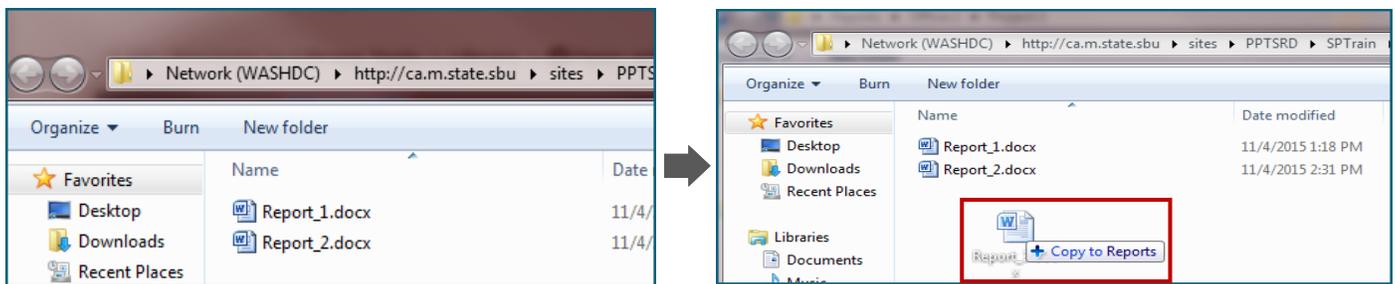
Method 2: Uploading Documents through Windows Explorer

This method is very helpful if you need to transfer a lot of documents at once:

2.12) Navigate to **8** Library Tools > Library > Open with Explorer:

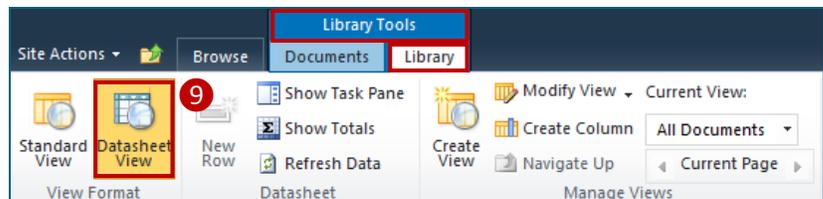


2.13) This opens the SharePoint Library as a folder in Windows:

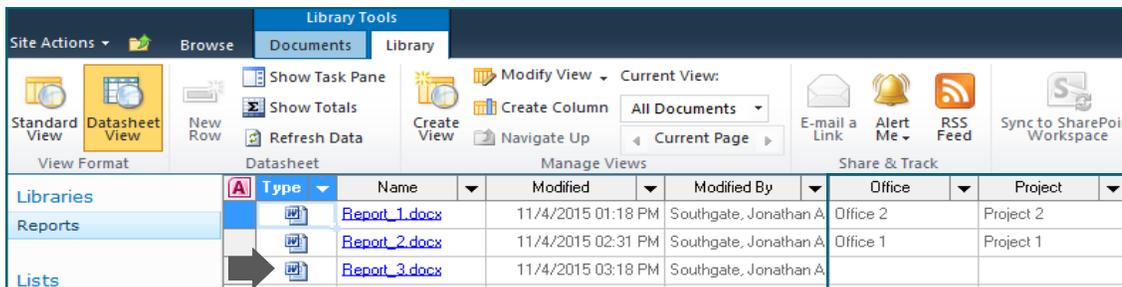


2.14) Drag all of the necessary documents from share drives or desktop folders into this folder.

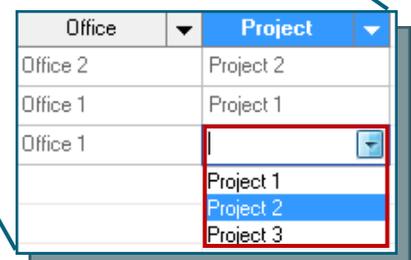
2.15) Return to SharePoint, then navigate to **9** Library Tools > Library > Datasheet View:



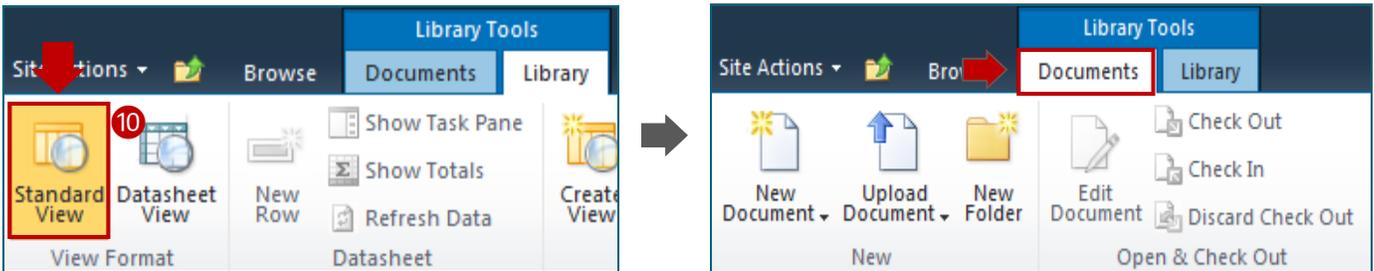
2.16) The library is now viewed as a datasheet (notice the document that was dragged into the folder):



2.17) Complete the metadata for each document, making sure to fill in every column.



2.18) Finally, navigate to **10 Standard View > Library Tools > Documents:**



2.19) All of the documents that were dragged into the windows explorer folder have a **green arrow** over the icon, this indicates that they are "checked-out". Refer to Module 1's section on [Checking Out Documents](#) for an explanation of what checking documents entails.

Select each document with an **green arrow** icon:

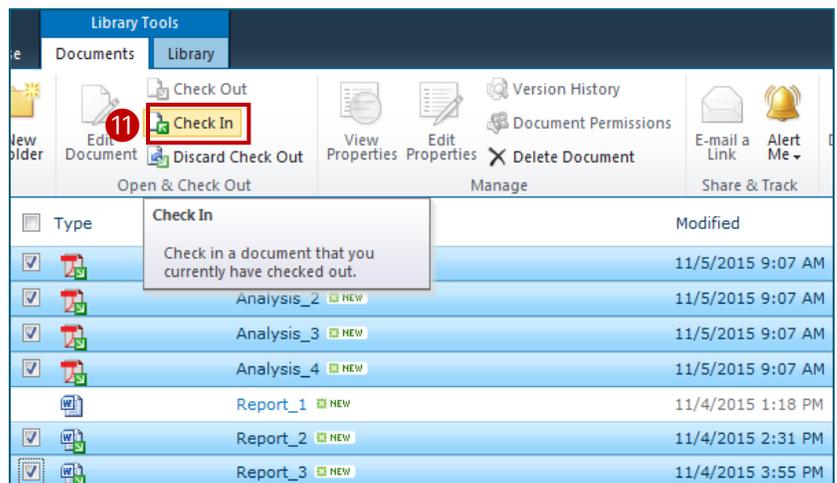
Type	Name	Modified	Office	Project
<input checked="" type="checkbox"/>	Analysis_1	11/5/2015 9:07 AM	Office 3	Project 2
<input checked="" type="checkbox"/>	Analysis_2	11/5/2015 9:07 AM	Office 3	Project 2
<input type="checkbox"/>	Analysis_3	11/5/2015 9:07 AM	Office 3	Project 1
<input type="checkbox"/>	Analysis_4	11/5/2015 9:07 AM	Office 2	Project 1
<input type="checkbox"/>	Report_1	11/4/2015 1:18 PM	Office 2	Project 2
<input type="checkbox"/>	Report_2	11/4/2015 2:31 PM	Office 1	Project 1
<input type="checkbox"/>	Report_3	11/4/2015 3:55 PM	Office 1	Project 1

2.20) Once all of the documents are selected, click on **11 Check In**.

2.21) In the pop-up window, select "NO" for retaining your check out:



2.22) All of the documents are now checked in and tagged.



Continues on the next page



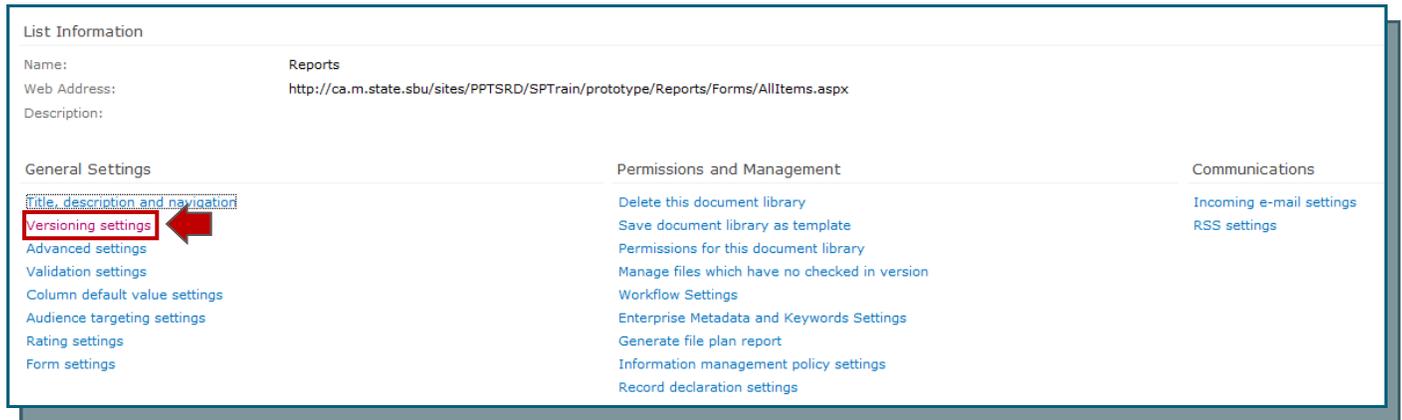
Document Versioning

Site designers can enable versioning for an entire document library. Versioning is very helpful for tracking changes to a document without saving multiple “versions”. Below are the steps to enabling versioning:

2.23) Navigate to **1** Library Tools > Library > Library Settings:

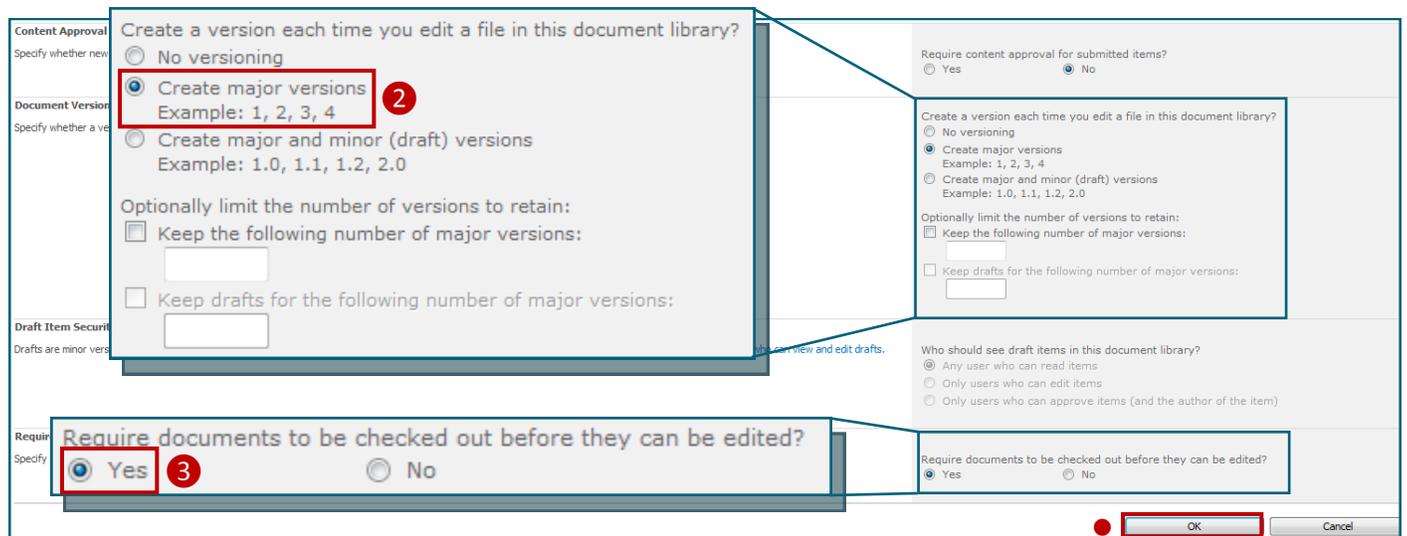


2.24) Under **General Settings**, click on **Versioning Settings**:



2.25) In the versioning settings screen, select options that work for your needs.

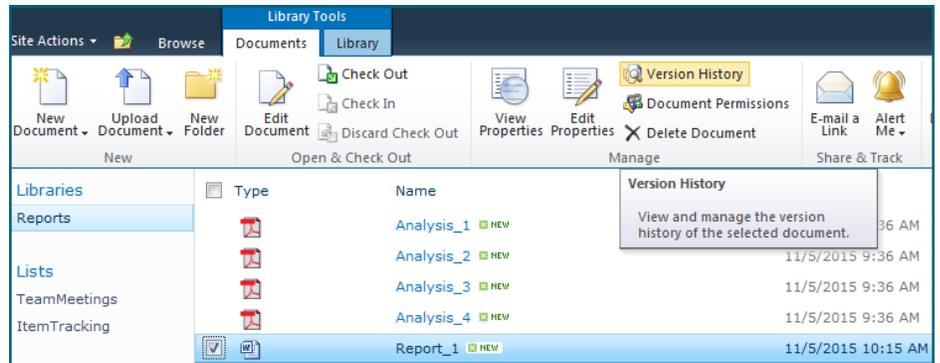
In general, it is good practice to select **2** Create major versions in the **Document Version History** section and **3** Yes in the **Require Check Out** section:



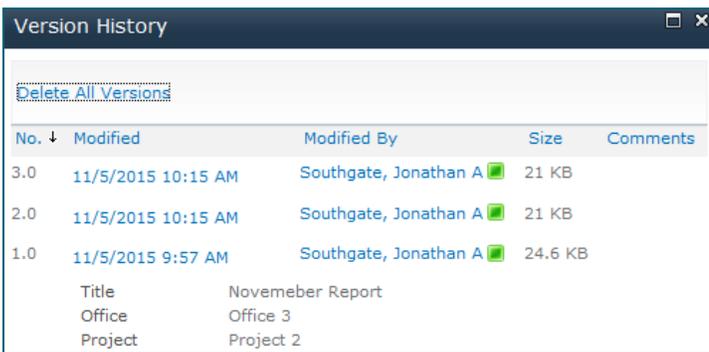
TIP: Keep the limit of versions to 10. After making your selections, click on **OK**.

2.26) With versioning on and check out required, only one user will be able to edit a document at a time. The most recent version of a document will also display in the document library.

2.27) To check the version history for a document (if versioning is enabled), navigate to **4 Library Tools > Documents > Version History:**

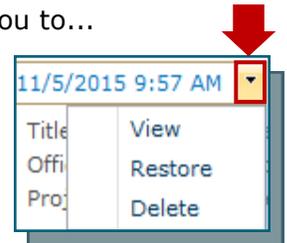


The following window appears:



- Every iteration of the document will be displayed in this list, including who modifying the document and when.
- Clicking on the arrow next to the **modified date** of a version allows you to...

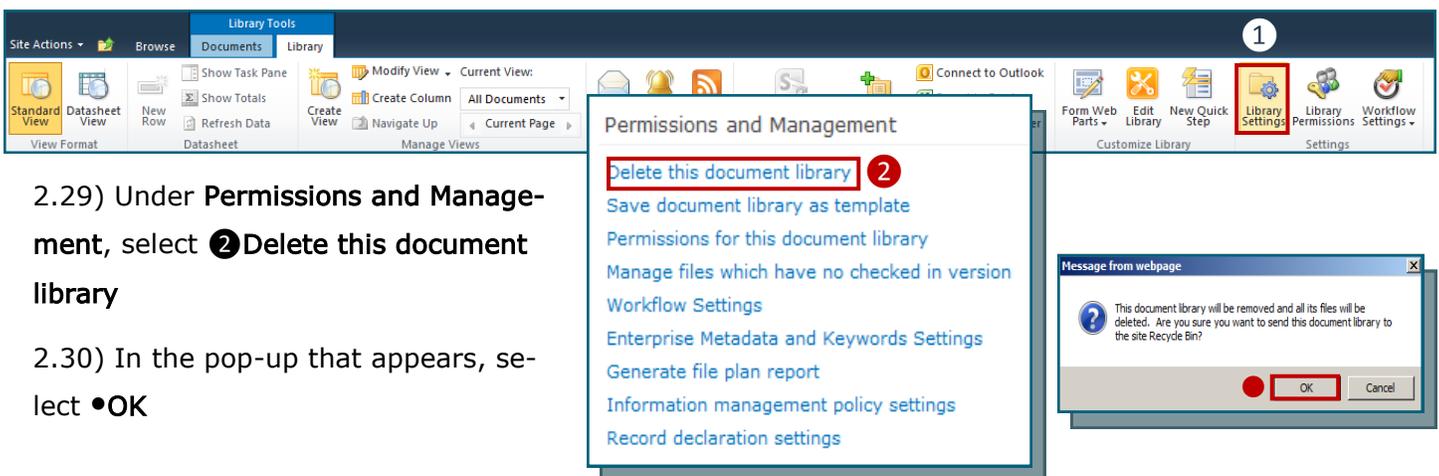
- ⇒ **view** the version.
- ⇒ **restore** that version to the library.
- ⇒ **delete** the version.



Delete a Library

In order to delete a list, follow these steps...

2.28) While in a library, navigate to **1 Library Tools > Library > Library Settings**



2.29) Under **Permissions and Management**, select **2 Delete this document library**

2.30) In the pop-up that appears, select **OK**

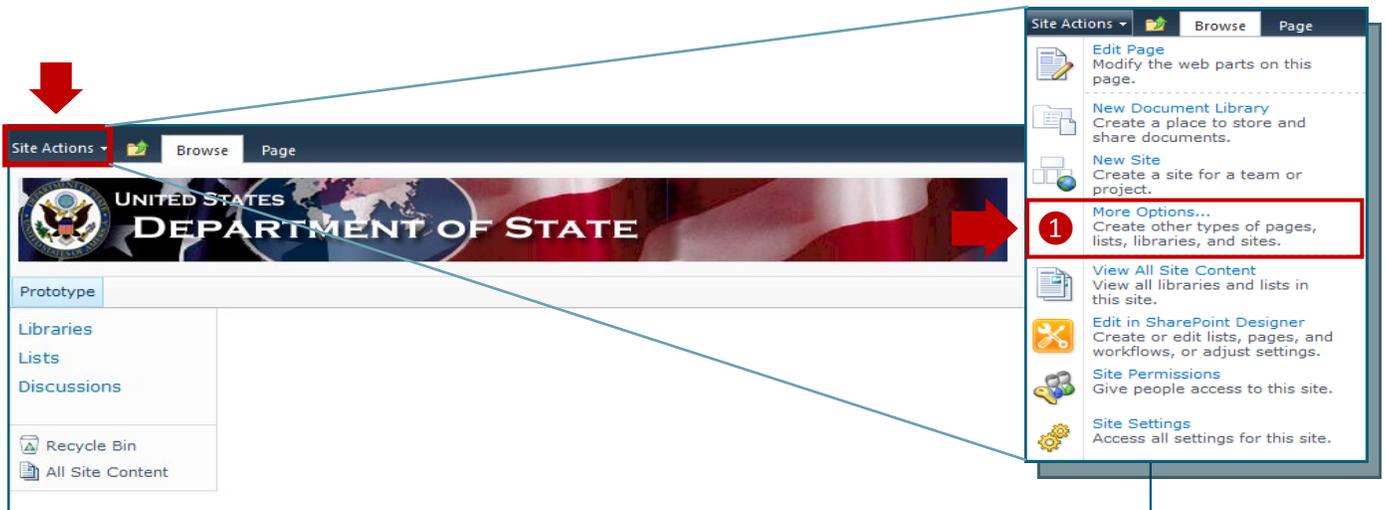
SharePoint Pages & Web Parts

Pages are spaces where information can be aggregated and displayed. Below is a step-by-step guide on creating a Page:

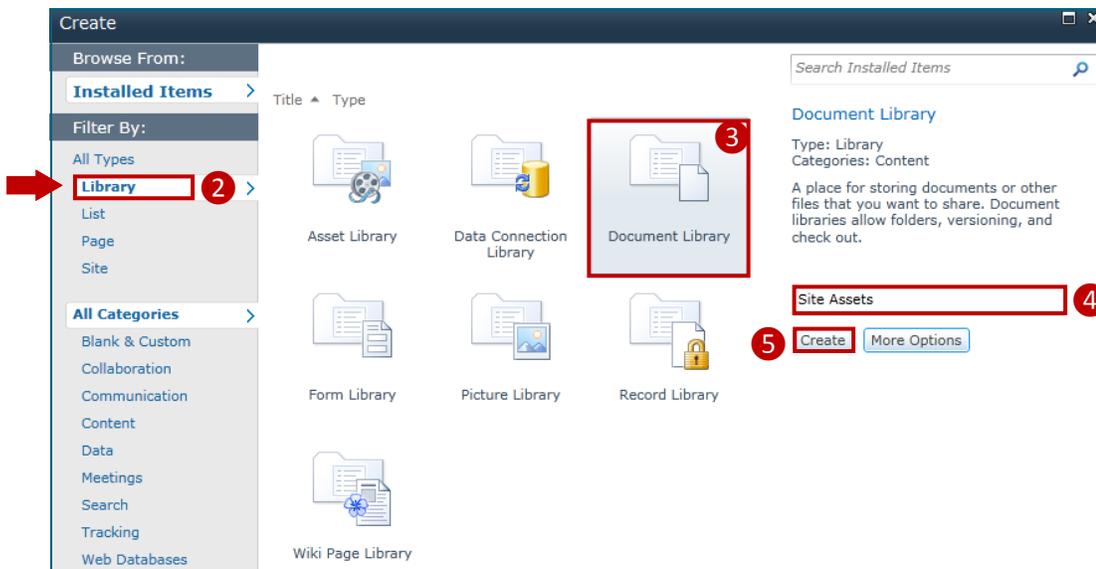
SharePoint Infrastructure

3.0) Before a SharePoint page can be built, we need to ensure that we have the proper infrastructure. It is **best practice** to include a **Site Assets Library** in all SharePoint sites. This is a library where SharePoint Pages, images, and other media can be stored.

3.1) Begin by creating a **Site Asset Library**. To do this, navigate to **1 Site Actions > More Options**



3.3) In the window that opens, select **2 Library** from the side menu, then **3 Documents Library**:



In the **4 Name Field**, enter the name for this document library. The name for this library is:

Site Assets

Then click **5 Create**

3.4) A **Site Assets Library** for your SharePoint site is now available. This document library will store any pages that you create for the site and house images and other media used throughout the site.

3.5) With the new document library opened, create a new column with the following criteria:

Name: Media Type

Type: [Choice], with the following options: [Page] & [Image] (add other media as needed)

^ TIP: Assign "Page" as the default choice.

Additional Options: select [YES] for requiring information and [No] for Fill-In

NOTE: You can review how to create a column by clicking [here](#) (pg. 30).

3.6) Next, create two views;

View 1 (Pages): Standard View > Filtered for the [Page] option in the [Media Type] column

View 2 (Image): Standard View > Filtered for the [Image] option in the [Media Type] column

NOTE: You can review how to create a view by clicking [here](#) (pg. 32).

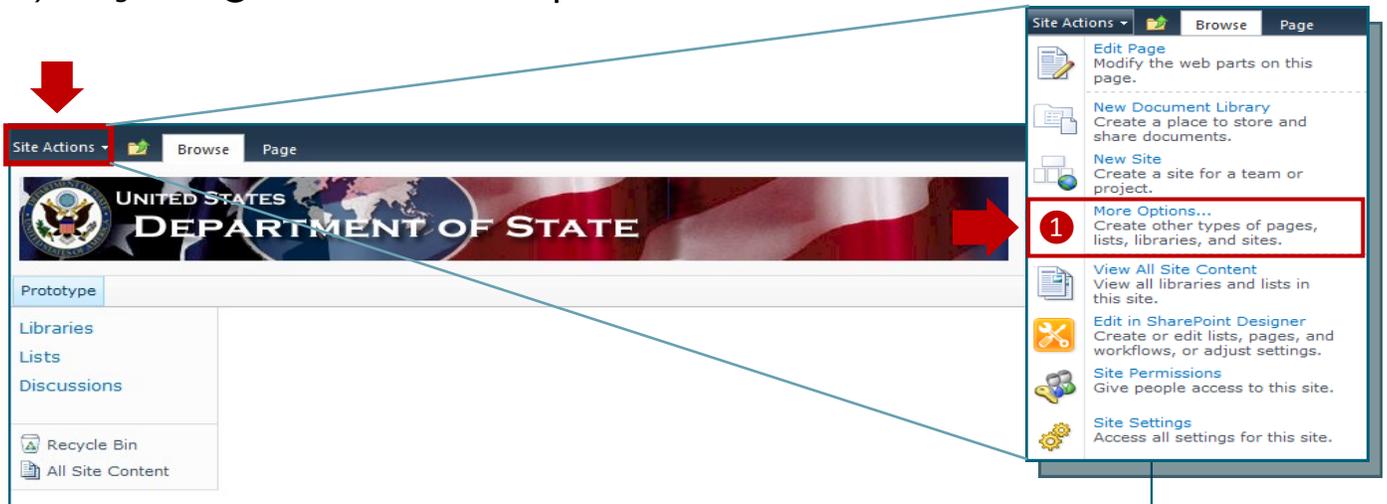
3.7) The SharePoint site's **Site Assets Library** is now ready to house all the media for your SharePoint Site. Any media that you use for the site should be housed in this library. Create as many media type choices and views as there are media types in your site: images, videos, etc

Creating Pages

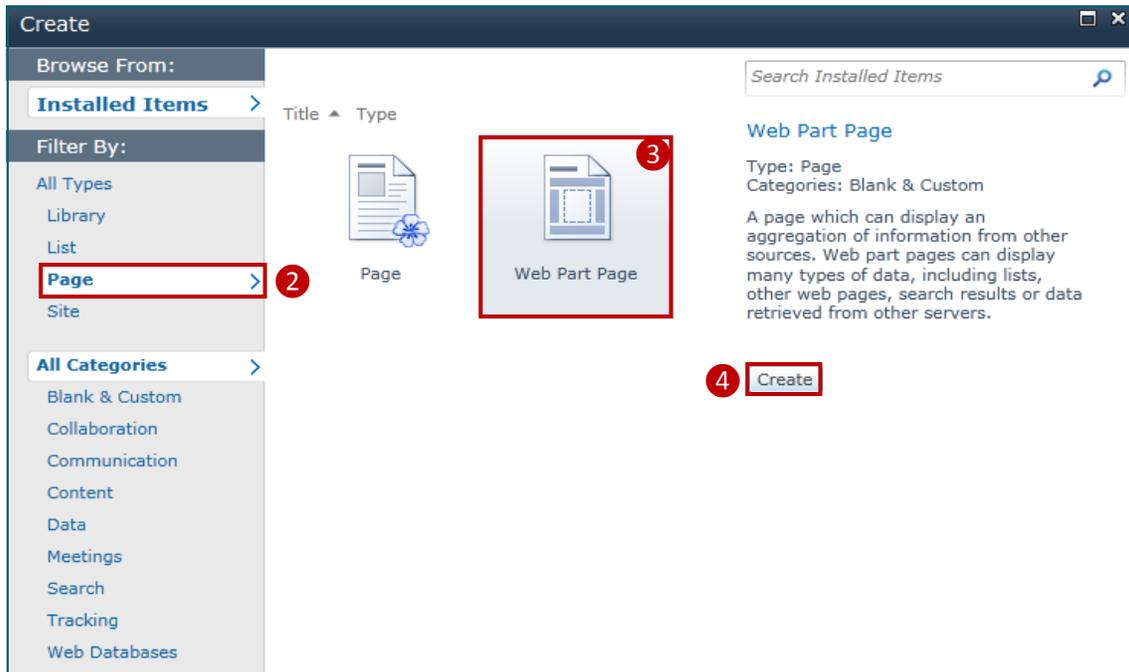
In addition to the main site page that is automatically created, site designers can create additional web-part pages that can be used to aggregate and display information for end-users.

After a brief walkthrough of how to create a page, we will explore the use of web-parts in both these additional pages and the main SharePoint page:

3.8) Navigate to **1 Site Actions > More Options**



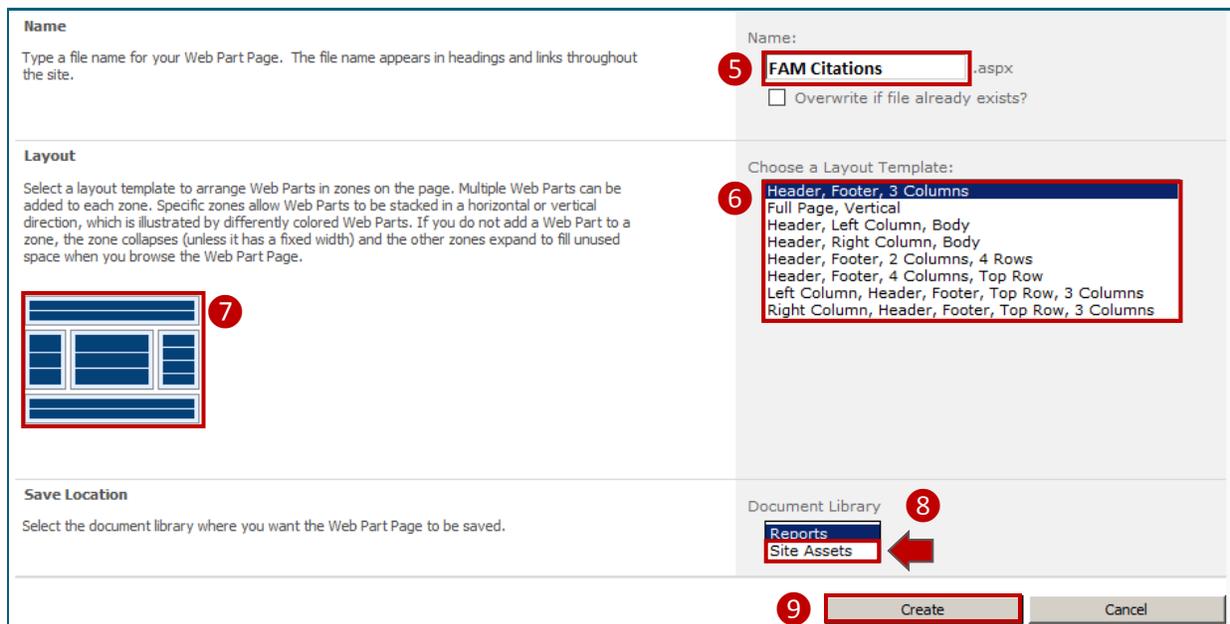
3.9) Select **2** Page from the side menu, then **3** Web Part Page, then click **4** Create:



3.10) In the screen that appears, **5** Enter a title for this page.

3.11) Next, select a **6** site template, the **7** Layout Map, in the left-hand corner of the screen, will show you where the web parts will be listed in whichever template you select.

3.12) Finally, select **8** Site Assets from the drop down menu, this will store this page in the **Site Assets** library you just created:



3.13) After completing all of the fields, click on **9** Create. The page is now ready to edit.

Web Parts

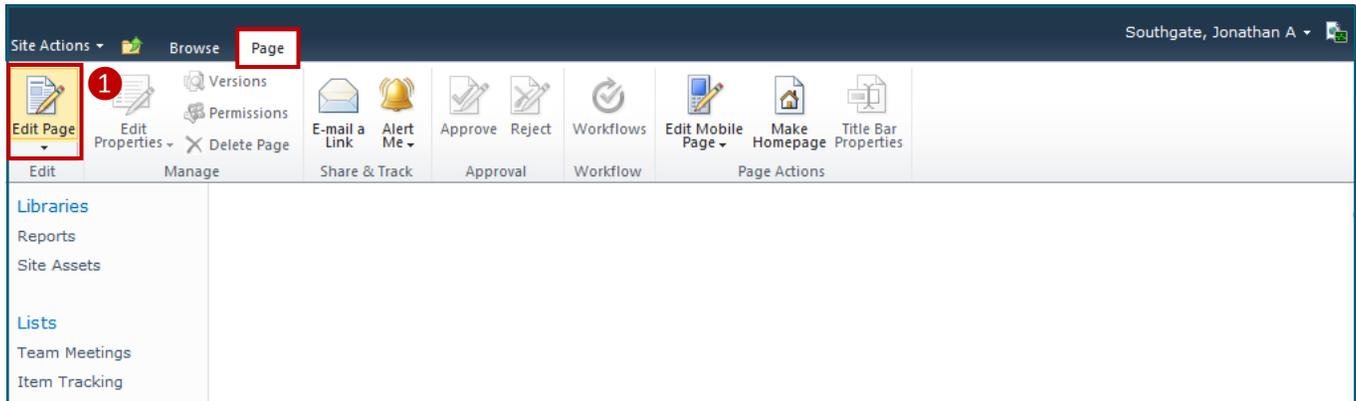
Web Parts are used to dynamically show the content of lists & libraries and to display rich text & graphics on SharePoint sites and pages. Below are common web parts used by CA SharePoint Sites:

- 1) **Documents Portal:** Displays the content of a library or list from within the site. The data or documents can be filtered using views if necessary.
- 2) **Content Editor:** A rich text editable space that can be used to display print information such as announcements, contact information, helpful links etc.
- 3) **Calendars:** Displays a list in calendar view to highlight important dates, such as holidays.
- 4) **Graphics:** Images or logos can be added throughout the site using web parts.

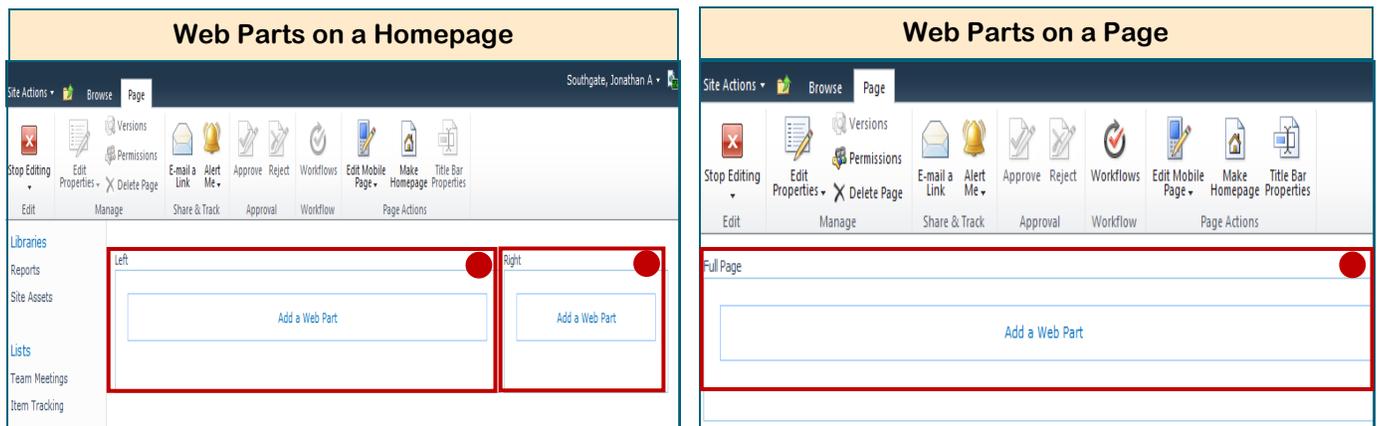
There are two areas where web parts can be created **A) Site Homepages & B) Pages**

To enable editing of web parts on a SharePoint site's home page or page follow these steps:

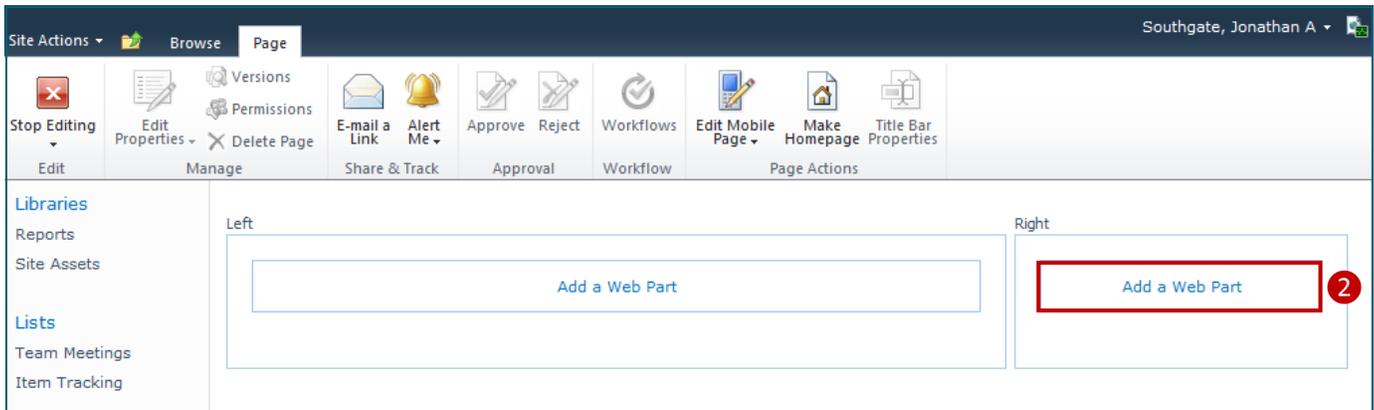
3.14) With the homepage or site open, navigate to **1) Page > Edit Page:**



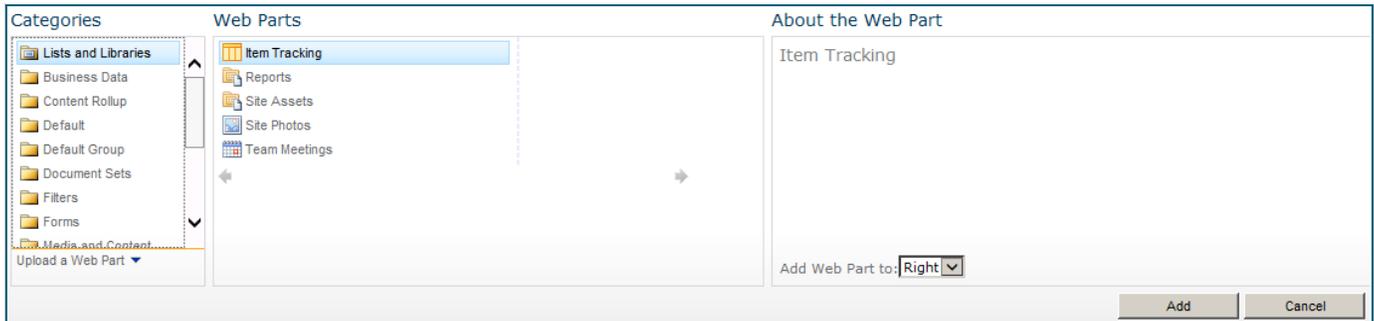
3.15) The page is now editable; the page template determines where **●web-parts** can be added:



3.16) Based on where you want a web part placed, click on the ② Add a Web Part



3.17) The following selection pane becomes visible at the top of the page:



3.18) Web Parts are organized by category; these are the three most common web-parts:

Category	Web Part	Description
Lists and Libraries	A selection of all lists and libraries present on the site	A box that displays data from lists (including calendars) and libraries. Data can be filtered by view within the web-part.
Media and Content	Content Editor	An editable box that allows you to input rich text (i.e. bold, italic, different fonts, hyperlinks, etc).
Media and Content	Image Viewer	A box that can show any image stored in the Site Assets library.

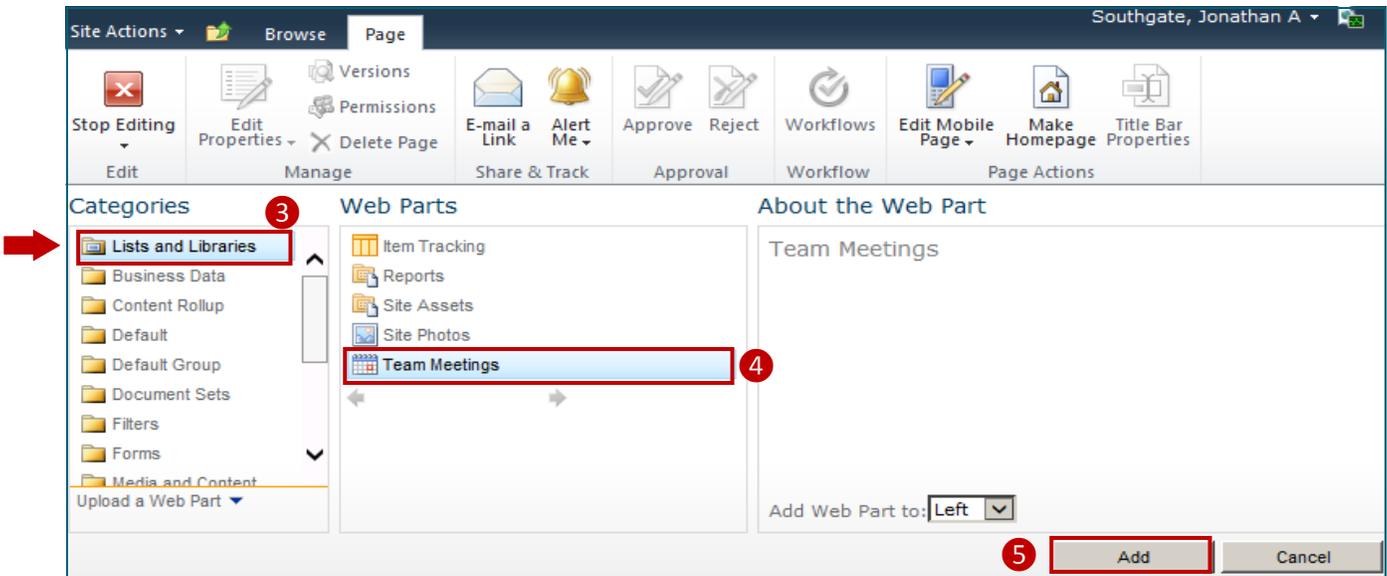
3.19) Next we will walk through the creation of three web-parts: A) List / B) Library / C) Text

Continues on the next page

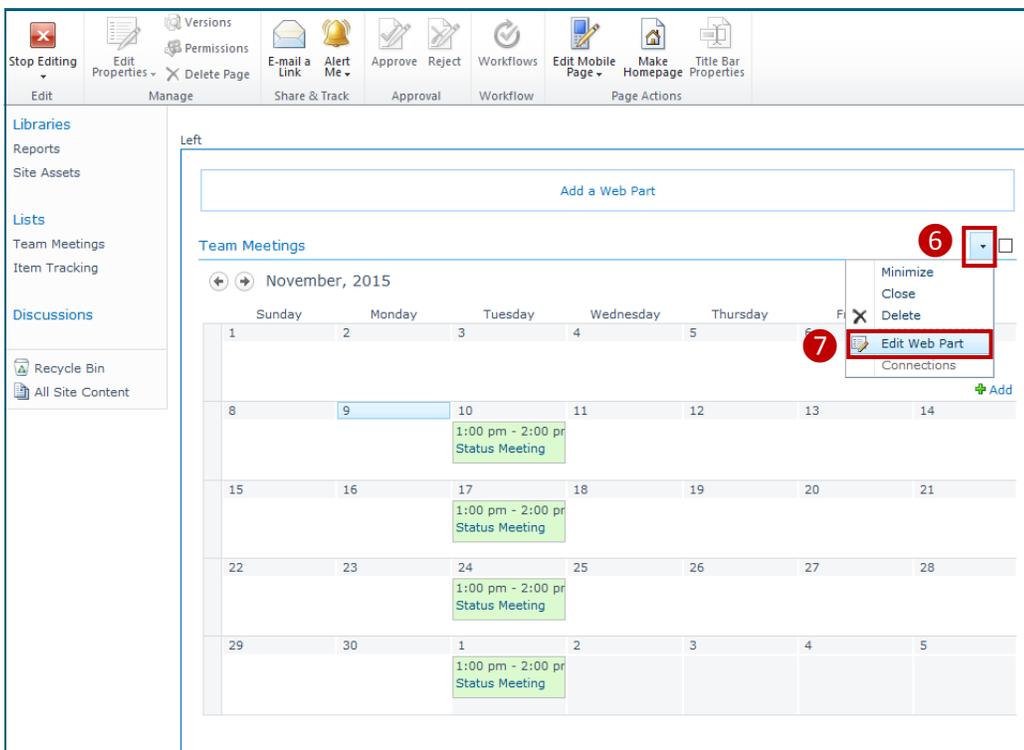
A) List

The most common list displayed on web-parts are calendars. Below is a walkthrough to place a calendar web-part on the homepage of your site.

3.20) From the opened Web-Part selection window, go to the **3** List and Libraries category and select a Calendar List, in this example this list is called **4** Team Meetings, then click **5** Add:

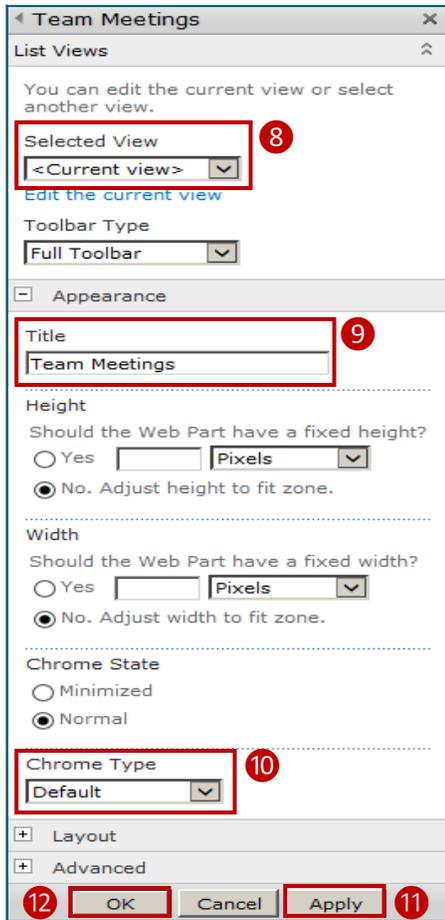


3.21) The calendar list is now listed in the left web part column:



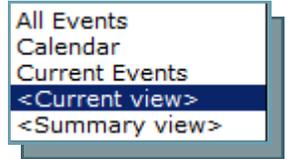
If you want to customize how the calendar displays on the page, click on the **6** arrow in the upper right-hand corner of the web part and select **7** Edit Web Part.

3.22) The web part edit pane appears on the right hand side of the screen, below are the important options to take note of:



List Views

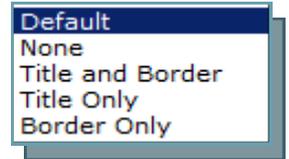
8 Selected View: Select a view for the list from the drop-down menu. The default view is selected automatically, in the case of a calendar list it is *calendar*.



Appearance (click + to expand this menu)

9 Title: Change how the web-part is labeled (note this does not change the title of the list).

10 Chrome Type: Select whether you want the title and border to display or not.



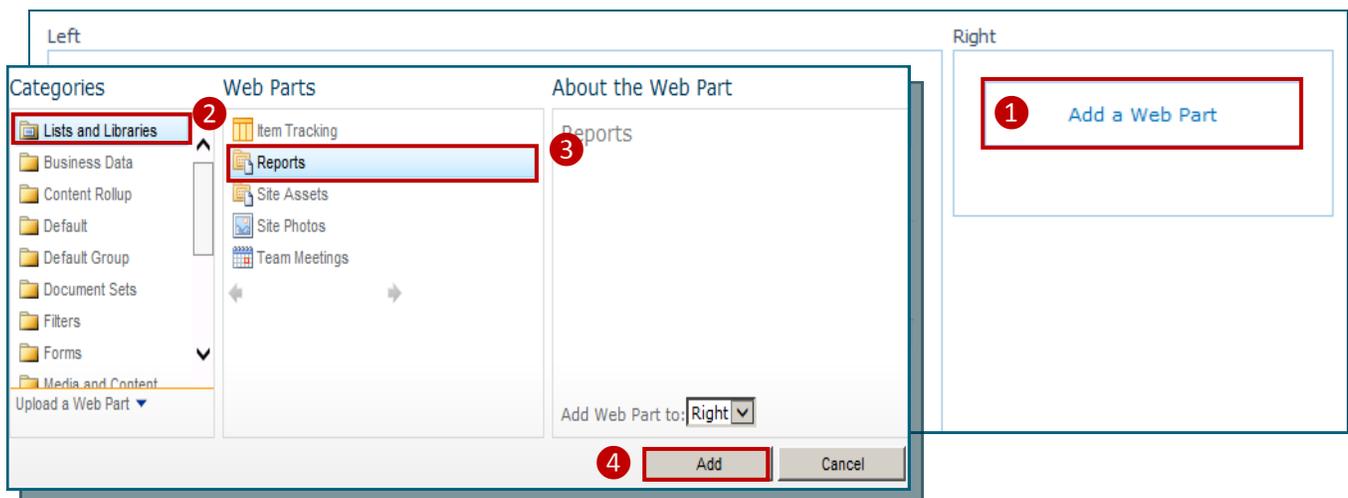
Selecting other options is not required for most web-parts.

After making all necessary changes, click **11 Apply**, then **12 OK**.

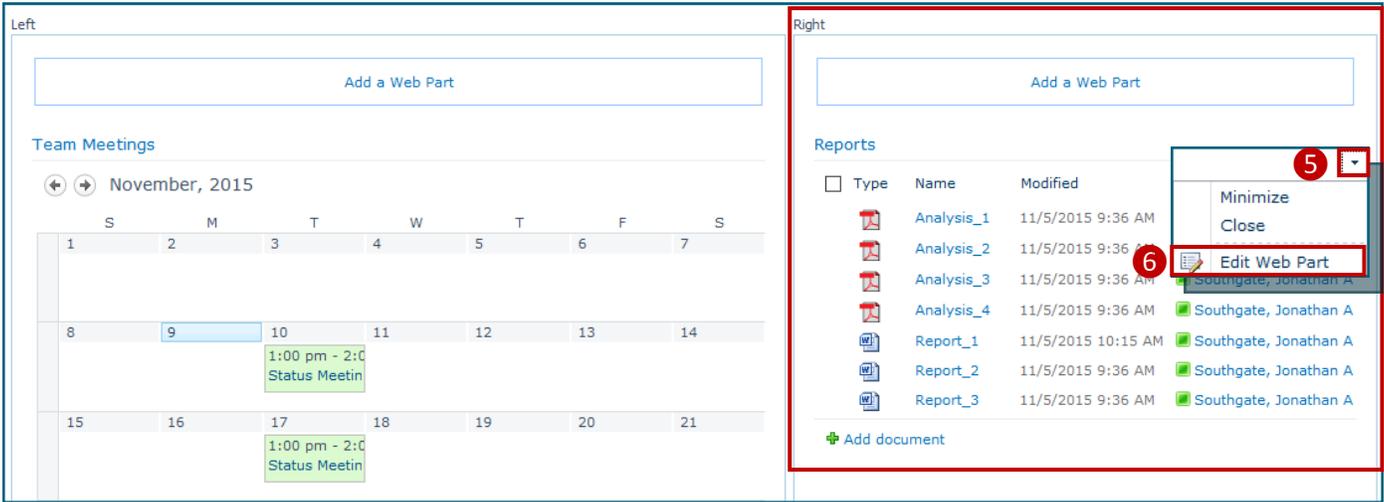
— A calendar web-part is now part of your page —

B) Library

3.23) Click on **1 Add a Web Part** in the right-hand column, then go to the **2 List and Libraries** category and select a library, in this example the library is called **3 Reports**, then click **4 Add**:

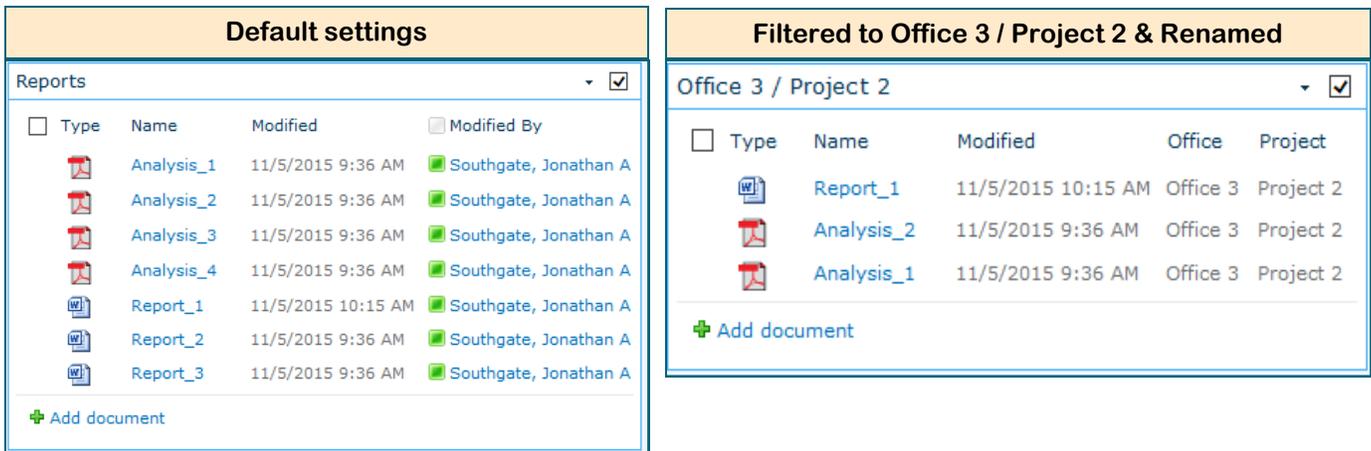


3.24) The library web-part appears in the right-hand column:

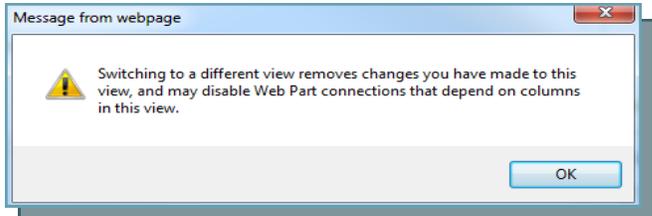


If you want to customize how the library displays on the page, click on the **5** arrow in the upper right-hand corner of the web part and select **6** Edit Web Part.

3.25) The web part edit pane is the same as it was for a list. Refer to **page 35** for help modifying the view and title. It is common to assign particular views to web-parts and rename the web-part to match that filter. Below is an example:



NOTE: Any changes made to a view for a list or library will not automatically transfer to web-part views. Every time you make a change to a web-part view. SharePoint will remind you of this with the following message:

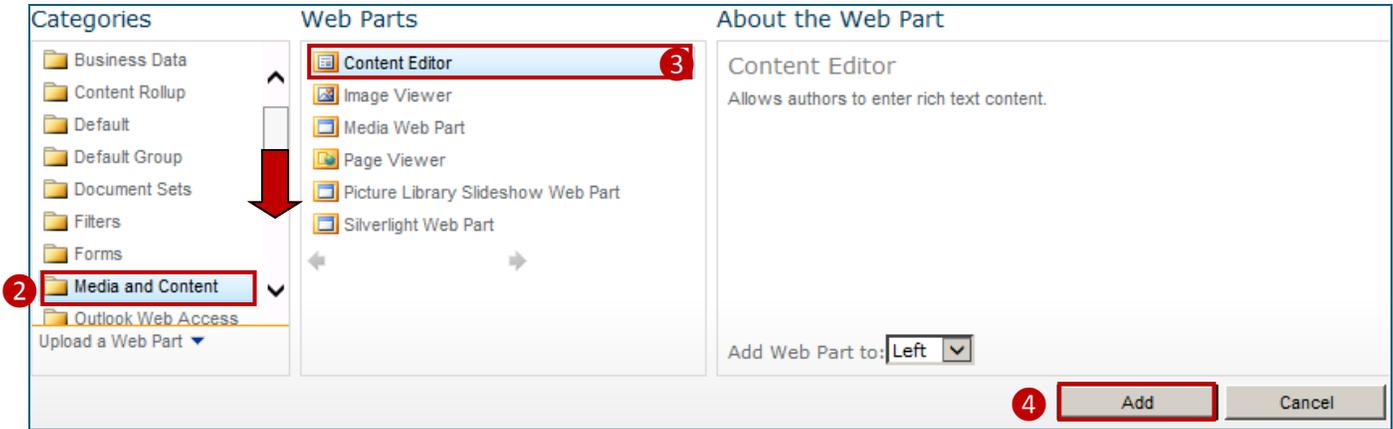
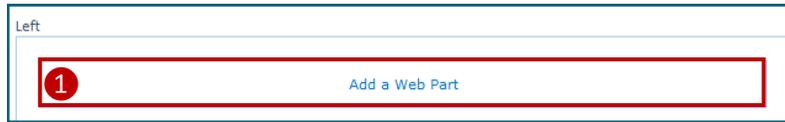


If changes are made to a particular view, return to the web-part edit pane and select the view again. After clicking **Apply** and **OK** the updated view will be visible through the web part.

— A library web-part is now part of your page —

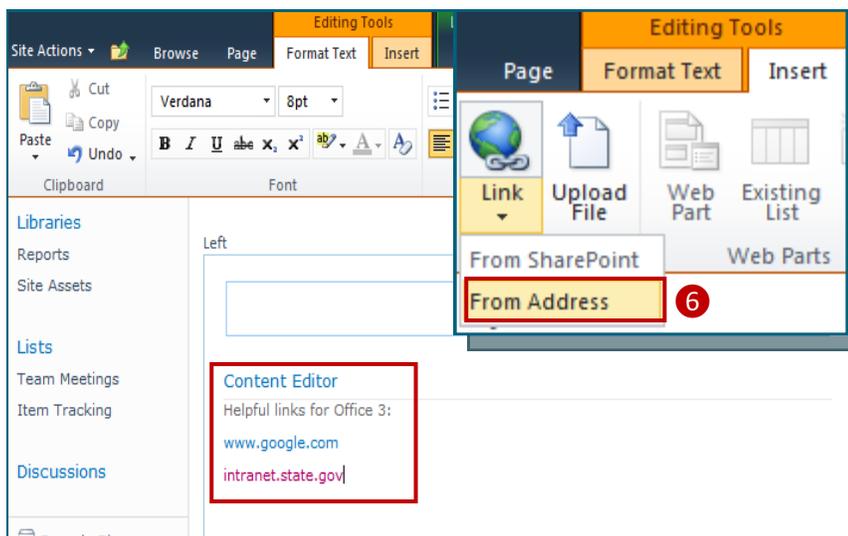
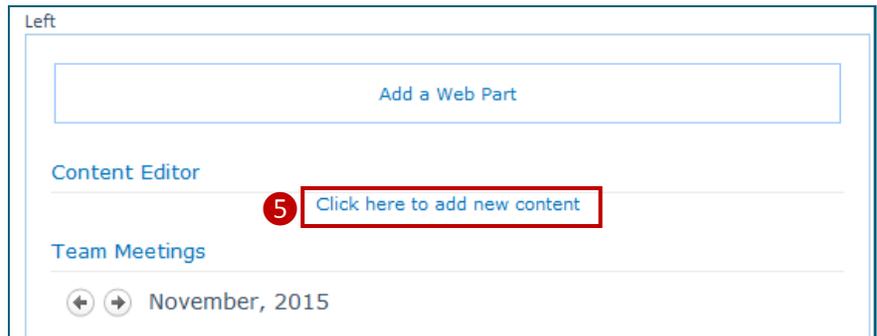
C) Text

3.26) Click on **1** Add a Web Part in the left-hand column, then scroll down the category list to the **2** Media and Content category and select **3** Content Editor, then click **4** Add:



3.27) The content editor placeholder appears in the column you selected.

Click on **5** Click here to add new content to add content to the web part:



3.28) In the blank space provided, type information that you want visible from the page. This may include, helpful links, contact information, etc.

To insert hyperlinks, type an address, SharePoint should automatically create the link.

If not, navigate to **6** Editing Tools > Insert > Link > From Address and type in the address.

3.28) To edit a content editor, click on the **Arrow** in the upper right-hand corner of the web-part and select **Edit Web Part**:



3.29) The Content Editor edit pane appears on the right side of the screen. There are two important options to take note of. Both options are found under the **+ Appearance** section:

9 Title: The title "content editor" is automatically assigned to a new content editor web-part. Change the title in this field if necessary. For this example, we will not show the title, so a change is not necessary.

10 Chrome Type: This options allows you to control whether a border and/or title appear around the web-part. For this example we will select **"None"**.



3.30) After making necessary changes, click **Apply**, then **OK**.

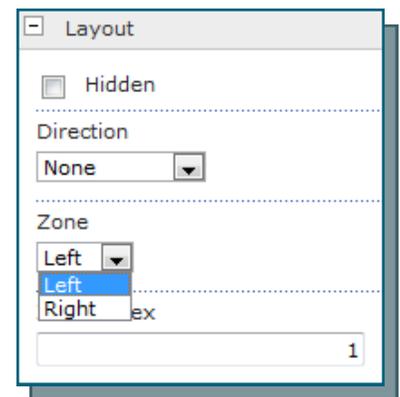
NOTE: Any changes to the appearance of borders / titles will not be visible until you select **Stop Editing** in the upper left-hand corner.

— A Content Editor web-part is now part of your page —

Moving Web Parts

3.31) Once a web-part is placed on a homepage or page, it can be moved around the page. There are two methods for doing this:

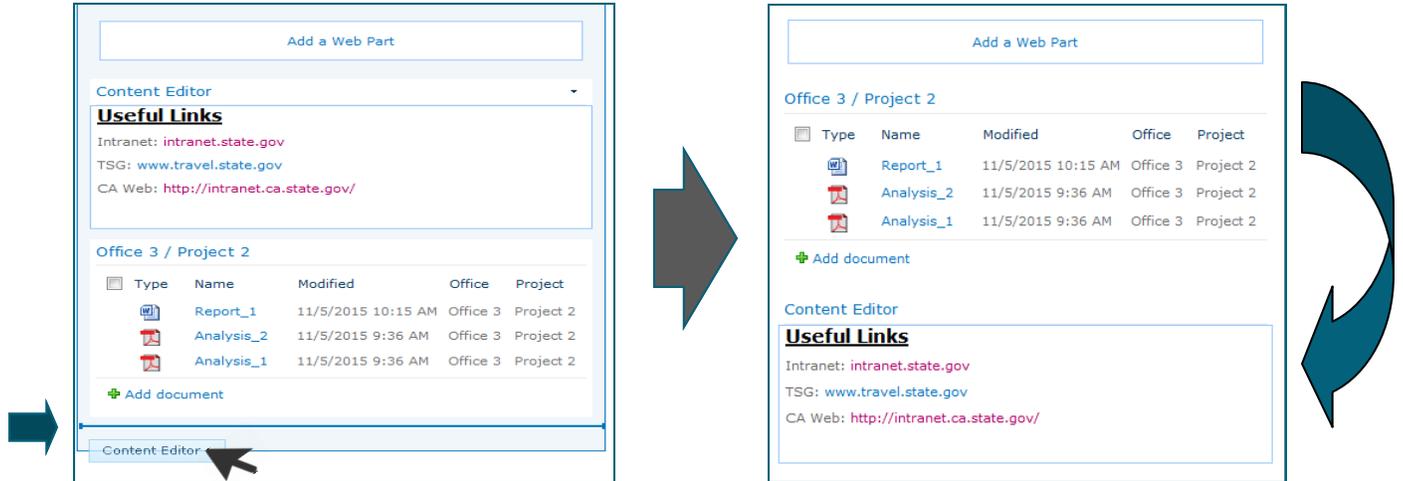
1) Menu Options: Navigate to the editing pane of a web-part, then click on the **Layout** menu option. Within the layout sub-menu there is an option to change the "zone". This refers to the column that a web-part is located in. The number and location of these columns is determined by the template selected for the page. Homepages automatically have two columns (or zones): right and left.



Continues on the next page

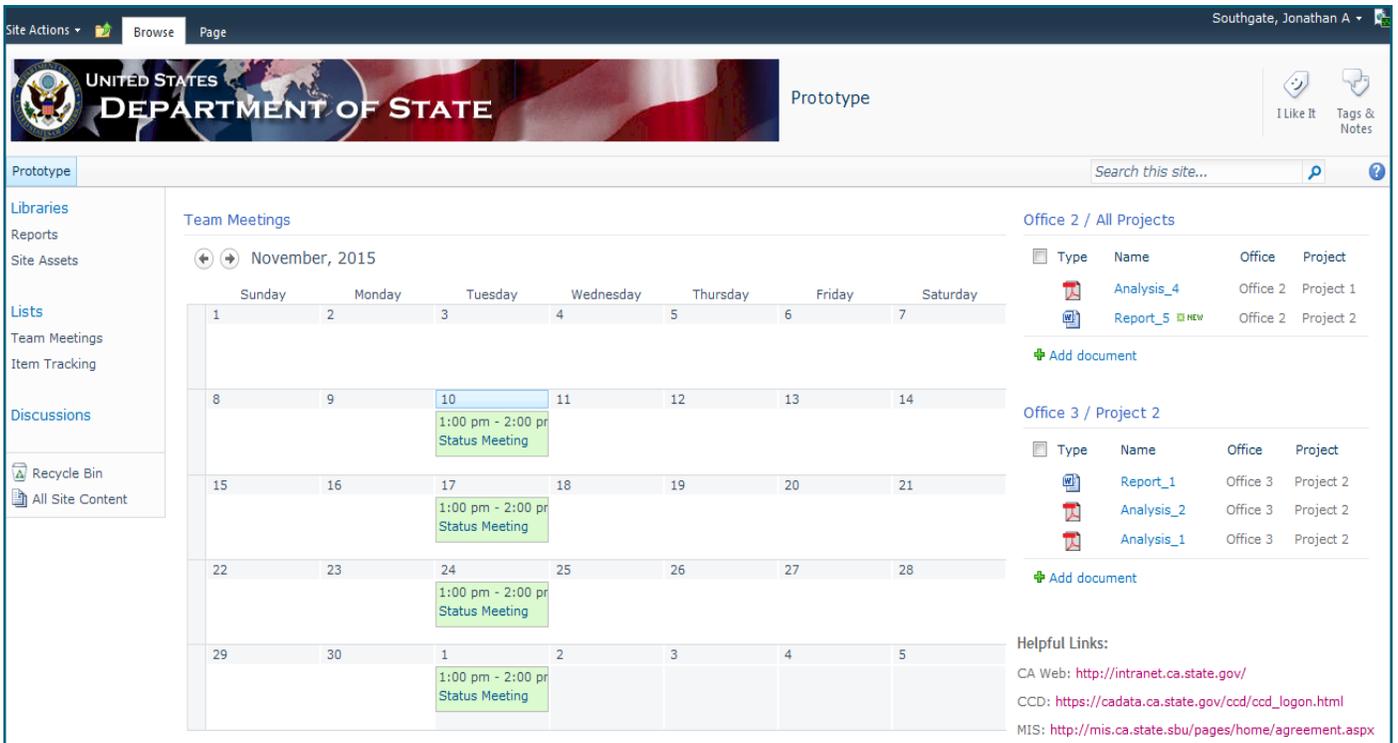
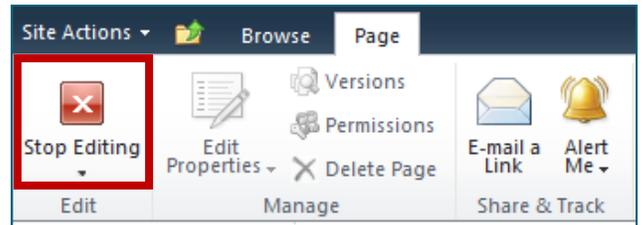


2) **Drag & Drop:** While in "edit mode", web-parts can be dragged to new locations by clicking and holding the title bar of the web-part. Drag the web-part until a solid blue line is visible (this is where the web-part will land if the mouse is released). The web-part is now moved:



3.32) After completing all web-part edits, close the editing view by navigating to **Page > Stop Editing:**

We've completed a SharePoint Site, below is the home page with web-parts, lists, libraries, and pages:



SharePoint Navigation

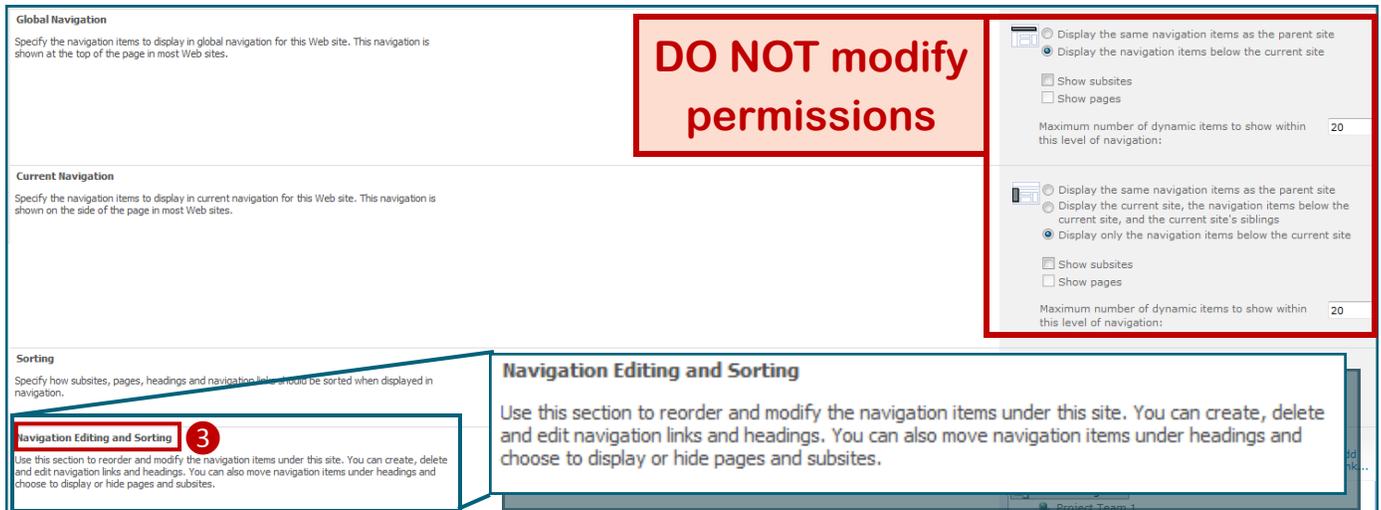
As we saw in Module 1, there are two primary areas for site links throughout a SharePoint site: The link bar and side bar. Site designers have the ability to modify what is displayed on these lists. This walkthrough will explain how to do this.

4.0) From the landing page for the site, navigate to **1 Site Actions > Site Settings**.

4.1) In the window that appears, navigate to **2 Look and Feel > Navigation**.



4.2) In the window that appears there are several options available. We will focus on the **3 Navigation Editing and Sorting** section at the bottom of the page.



4.3) The editing panel of the **Navigation Editing and Sorting** section, allows you to define which links are shown and hidden on the top and site navigation bars:

Global Navigation = **Top Navigation Bar** (these links are visible in all sub-sites under this site)

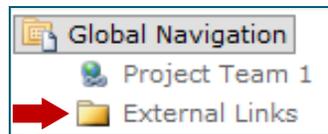
Current Navigation = **Side Bar** (these links are visible only in the current site)

Folders under **Current Navigation** correspond to the headers on the side bar.

Folders under **Global Navigation** correspond to drop-down menus on the top bar.

4.4) To add a new folder, select either **Global Navigation** or **Current Navigation**, then click on **4 Add Heading**. In the window that opens, enter a **5 Title** and click **6 OK**:

4.5) This creates a new folder under **Global Navigation**:



4.6) Click on the **External Links** folder, and click **7 Add Link**.

Enter a name for the link in the **8 Title** field, then enter the URL in the **9 URL** field. Always check the **10 Open Link in New Window** option.

Finally, click **11 OK** to build the link.

4.7) A link to TSG now appears under the **External Links** folder, this translates to a link in a drop-down menu on the top navigation bar:



4.8) Next, we will add a link to a page within the SharePoint site. Links to SharePoint pages are not automatically created, site designers must create these links.

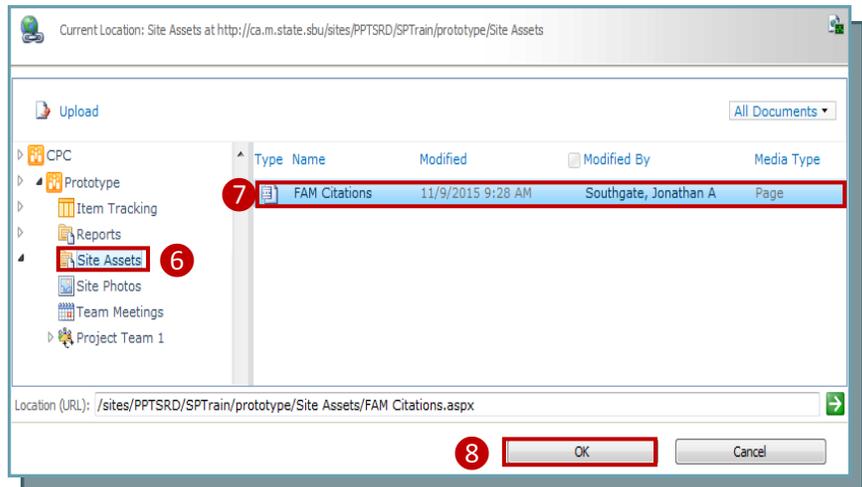
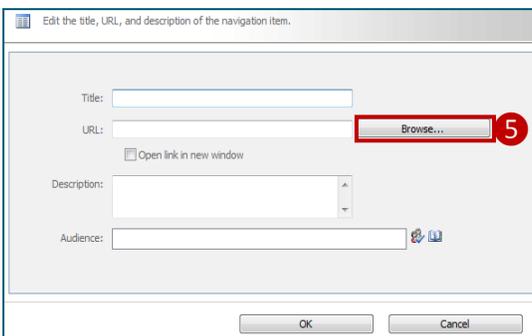
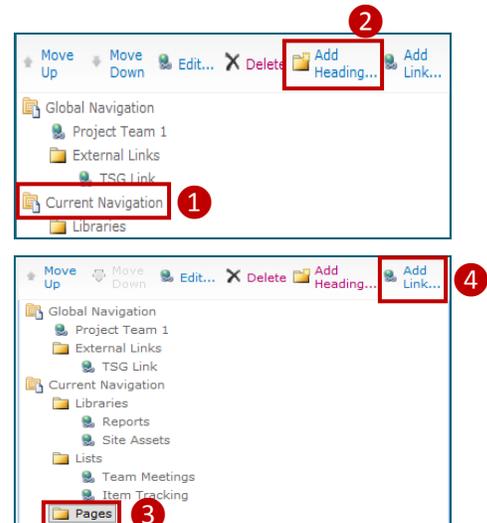
4.9) Begin by creating a "Pages" header. Click on the **1** Current Navigation header, then click **2** Add Heading.

4.10) In the pop-up window, name the field "Pages", then click OK.

4.11) Click on the new **3** Pages folder, then click **4** Add Link.

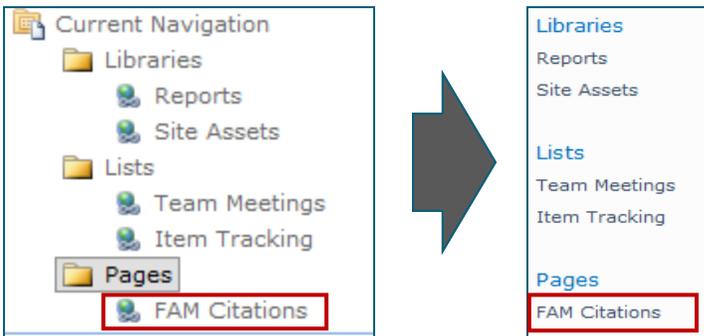
4.12) In the pop-up that appears, complete all of the fields as you did for the TSG link for step (4.6), except for the "URL" field. Instead do the following:

1. Click **5** Browse
2. Navigate to your site, then click on **6** Site Assets.
3. Select the Page to be linked, in this example, **7** FAM Citations.



4.13) Click on **8** OK once you have selected the site element that will be linked.

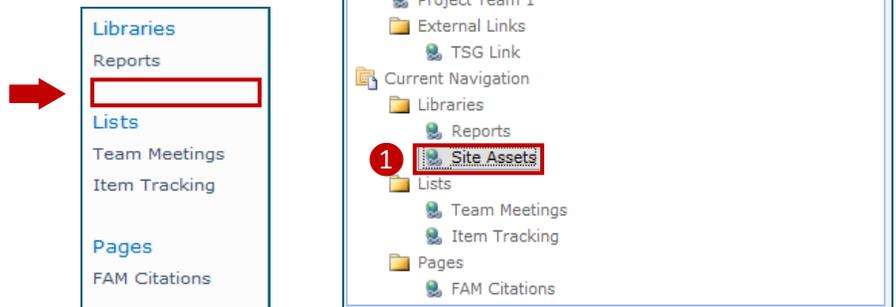
4.14) The link to "FAM Citations" is now available on the side bar:



4.15) Finally, there may be instances where you want to hide sites from the side bar. For example, you may not want to have "Site Assets" available to all users.

4.16) To delete a link, select the **1 Link**, then click **2 Delete**.

4.17) The link is removed; if you return to the main page, the link to **Site Assets** is no longer visible:



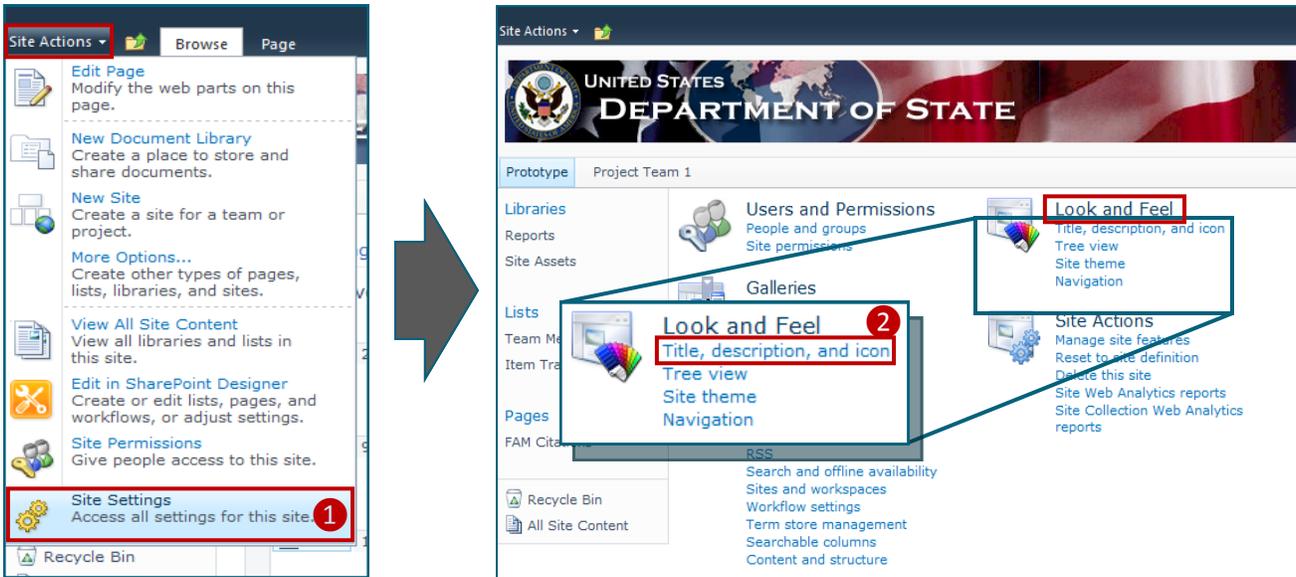
— Site Navigation Section is complete —

SharePoint Site Settings

In order to modify the URL, name, or banner image of a site, follow these steps:

5.0) From the landing page for the site, navigate to **1 Site Actions > Site Settings**.

5.1) In the window that appears, navigate to **2 Look and Feel > Title, description, and icon**.



5.2) In the window that appears there are several options available:

<p>Title and Description</p> <p>Type a title and description for your Web site. The title is displayed on each page in the site. The description is displayed on the home page.</p>	<p>Title:</p> <input type="text" value="CPC Prototype"/> <p>Description:</p> <input type="text"/>
<p>Logo URL and Description</p> <p>Associate a logo with this site by entering the URL to an image file (recommended size: 60 x 60 pixels). Add an optional description for the image. Note: If the file location has a local relative address, for example, /_layouts/images/logo.gif, you must copy the graphics file to that location on each front-end Web server.</p>	<p>URL:</p> <input type="text" value="http://ca.m.state.sbu/_layouts/images/SIO/s"/> <p>Click here to test</p> <p>Enter a description (used as alternative text for the picture):</p> <input type="text" value="http://ca.m.state.sbu/_layouts/images/SIO/state_banner.jpg"/>
<p>Web Site Address</p> <p>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.</p> <p>For example, http://ca.m.state.sbu/sites/PPTSRD/SPTTrain/sitename</p>	<p>URL name:</p> <input type="text" value="http://ca.m.state.sbu/sites/PPTSRD/SPTTrain/prototype"/>

NOTE: Place your logo image in the **Site Assets** folder and link to it directly.