## What Is SharePoint?

Unlike programs such as Word or Excel, Microsoft SharePoint is not a program that you install on your computer. It is either a network-based product that is installed on your company’s servers or is cloud-based for Office 365 users. In very simple terms, SharePoint is a tool that allows people to create websites where they can work together, save documents and find information.

What Is SharePoint Used For?

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

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

What Do SharePoint Sites Look Like?

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

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

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

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

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

## Course User Accounts

This course has been designed with the three default SharePoint groups in mind: ***Visitors***, ***Members*** and ***Owners***. These groups have access to different SharePoint features based on their permission levels. Here we describe the permissions for the three user accounts and explain how to sign in to a SharePoint site.

User Account Basics

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

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

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

Note: This course covers only the features that site ***Visitors*** can execute in SharePoint.

Signing Into The SharePoint Site

At the start of each chapter in this course, you will be instructed to sign in to the SharePoint site as a user with ***Read*** permissions.

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

1. If necessary, sign in to Windows on your computer using the user ID that has the required permissions in the SharePoint site for the exercise that you are about to complete

*Your course instructor will tell you which user to sign in to Windows as…*

1. Open the browser and type the URL to the SharePoint site – you will need to get this address from your course instructor

*SharePoint will open in the browser window and you will be prompted to sign in…*

1. Enter the user ID and password for a user account with ***Read*** permissions

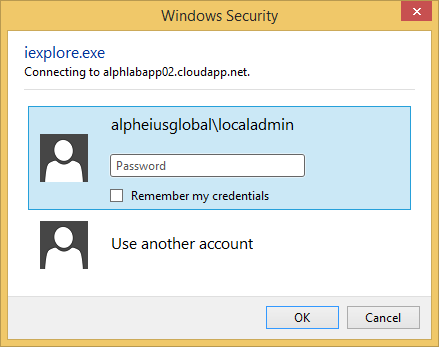
*The SharePoint site will open in the browser window.*

## Starting SharePoint

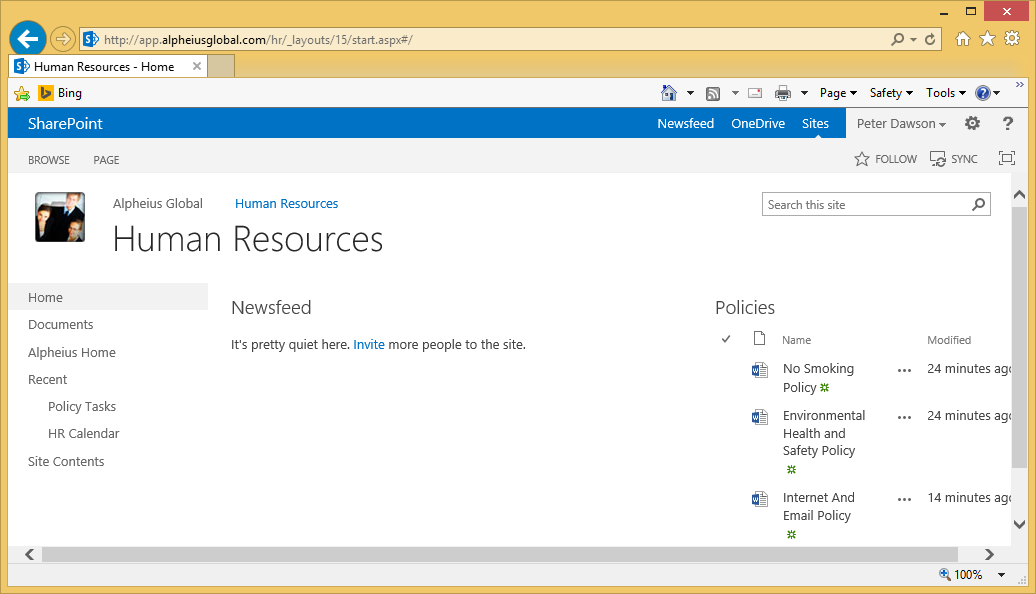
To access a SharePoint site, you must use an internet browser application. This is necessary as SharePoint is a browser-based web platform that uses specialised websites to gather, organise and present the information that you can access. You must know the location (URL) of the site – if you don’t, ask your administrator to email you the link to the specific site.

|  |  |
| --- | --- |
| **Try This Yourself:** | |
|  | Before starting this exercise ensure that your computer is switched on (you will need **Read** permissions for this exercise)… |
|  | Open your internet browser  *We’re using Internet Explorer but you can use another browser, such as Firefox or Chrome. Before you can open a SharePoint site, you must get the URL for the team site from your instructor...* |
|  | Type the URL to the ***Human Resources*** site in the addressbox in the browser window, then press  *Depending on the setup of the site and which version of SharePoint you are using, you might be prompted for a password…* |
|  | If prompted, type your user name and password, then click on **[OK]** or **[Sign in]**  *A SharePoint team site will display. Your site may look different to our sample as it depends on the way the site manager has set up the site* |

**2**



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



For Your Reference…

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

1. Open an internet browser

2. Type the link to the site in the address box

3. Press 

4. Type the ***User name*** and ***Password*** and click on **[OK]** or **[Sign in]** if prompted

Handy to Know…

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

**3**

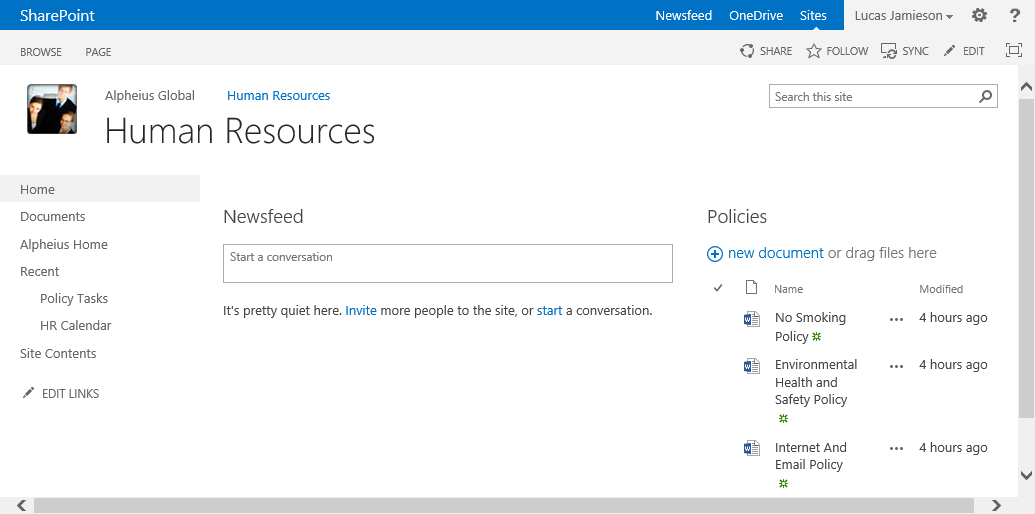
*If you don’t have access to a particular SharePoint site, the Access Denied page will display informing you of this. If this occurs, you will need to contact the site manager and request that they grant you permission to access the site.*

## Core Elements Of A SharePoint Site

All SharePoint sites are created from a template that best suits a particular business purpose. But regardless of which template is used, all sites tend to comprise the same basic elements. Here we look at one of the most commonly-used sites in SharePoint – the team site – to describe the core elements. Once you know how to use a team site, you can use any SharePoint site.

**2**

**3**



|  |  |  |
| --- | --- | --- |
|  | ***Ribbon*** | The ribbon provides tools and links to different functionality based on where you are and what you are doing in a SharePoint site. The ribbon tabs, which appear above the top navigation bar and site logo, let you click on a tab’s name to access that ribbon.  The ***BROWSE*** tab is the default tab in most pages. This tab includes two of the mechanisms that allow you to navigate the site – ***top navigation bar*** and the ***search*** box. (See chapter 2 for information describing how to use these features.)  As you move around the site, different tabs will display providing you with commands relevant for where you are. For example, in a site’s home page (as above), along with the ***BROWSE*** tab, the ***PAGE*** tab will display letting you email a link to the page or make the page your browser’s home page. Or, if you open a document library, two other tabs will appear in addition to the ***BROWSE*** tab providing tools to work with the documents (***FILES*** tab) and settings to work with the library as a whole (***LIBRARY*** tab). |
|  | ***Social networking options*** | Each SharePoint Server 2013 and SharePoint Online user has a personal site (known as ***My Site***)where data is personalised for them. Each personal site includes a ***Newsfeed***, ***OneDrive*** ***for Business*** document library and ***Sites*** pages. Your OneDrive for Business and Sites pages give you suggestions for documents and sites to follow, based on your profile informationand newsfeed activity.  See the *Social Networking* chapter for more details about these options. |
|  | ***Settings*** | The ***Settings*** menu (displayed by clicking on the gear icon) provides options for adding pages, sharing pages and more. |
|  | ***Help*** | Clicking on the ***Help*** icon displays the ***SharePoint Help*** pane where you can quickly search for help. |
|  | ***Main content area*** | This area displays the content in the selected page, such as the home page in our example above, a list of documents stored in document library, a calendar in a calendar list, and so on. |
|  | ***Quick launch bar*** | The quick launch bar (also known as the left navigation bar) provides clickable links normally to content in the current site. This content is usually lists and libraries, such as the ***Documents*** library and ***Policy Tasks*** and ***HR Calendar*** lists above. See the *Navigating A SharePoint Site* chapter for more information about using the quick launch bar. |

*Top navigation bar*

**1**

**4**

*Your name*

*Search*

**6**

**5**

*Site name*

## SharePoint Sites

A SharePoint ***site*** is a specialised website used to gather, organise and present the information you put into SharePoint. There are different types of sites available, including collaboration sites such as a team site or blog, enterprise sites such as a document centre or records centre, and publishing sites such as a large intranet portal or enterprise Wiki.

Sites

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

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

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

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

Personal Sites

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

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

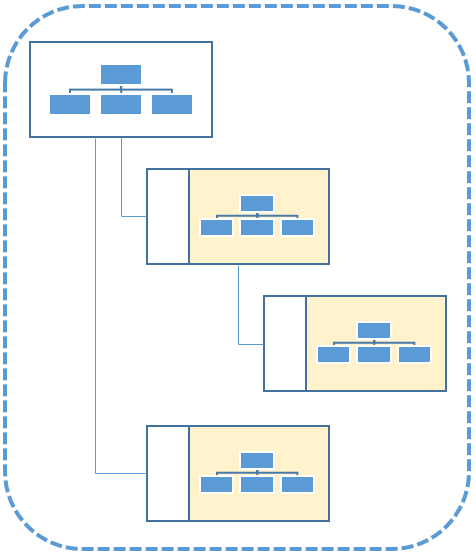
Personal sites (which are discussed in more detail later in the Social Networking chapter) are available for all versions of SharePoint except Foundation and SharePoint Online for Small Businesses.

Site Collections

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

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

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



*Top level site*

*Subsite*

*Subsite*

*Subsite*

*Site Collection*

## Team Sites

SharePoint offers a vast variety of built­‑in site templates. However, the most commonly used site template is the ***Team Site*** template. This template is used to create ***team sites*** which are the sites that are mainly used by teams of people to collaborate, organise, create and share documents. You will be using a team site for the rest of this course so we’ll describe them here in more detail.

What Is A SharePoint Team Site?

A SharePoint team site:

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

How Can A SharePoint Site Help You?

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

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