

# Microsoft SharePoint 2016

Step

by

Step

Olga Londer  
Penelope Coventry



PRACTICE FILES

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# Microsoft SharePoint 2016 Step by Step

Olga Londer  
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# Introduction



Welcome! This *Step by Step* book has been designed so you can read it from the beginning to learn about SharePoint 2016 and then build your skills as you learn to perform increasingly specialized procedures. Or, if you prefer, you can jump in wherever you need ready guidance for performing tasks. The how-to steps are delivered crisply and concisely—just the facts. You'll also find informative, full-color graphics that support the instructional content.

## Who this book is for

*Microsoft SharePoint 2016 Step by Step* is designed for use as a learning and reference resource by beginning-level and intermediate-level users who want to use SharePoint Server 2016 and/or SharePoint Online to create, modify, share, and manage sites, webpages, documents, and other content and capabilities; find information and people; and collaborate with others. *Microsoft SharePoint 2016 Step by Step* offers a comprehensive look at the capabilities and features of SharePoint Server 2016 and SharePoint Online that most people will use most frequently. The content of the book is designed to be useful for people who have previously used earlier versions of SharePoint and for people who are discovering SharePoint for the first time.

## The *Step by Step* approach

The book's coverage is divided into 14 chapters representing skill set areas. Chapters 1 through 3 address foundation skills such as navigating a SharePoint site and working with documents and information in lists and libraries. Chapters 4 through 6 show you how to make lists and libraries work for you, how to work with search, and how to use My Site and Microsoft OneDrive for Business. Chapters 7 and 8 focus on working with webpages and creating and managing SharePoint sites. Chapter 9 considers the social capabilities of SharePoint 2016, such as community sites, blogs, and wikis. Chapters 10 and 11 show you how to use business process features such as tasks and workflows.

Chapters 12 and 13 cover using SharePoint with Microsoft Office applications and the power of business intelligence. Finally, Chapter 14 drills into content management and monitoring.



**TIP** The first part of Chapter 1 contains introductory information that will primarily be of interest to readers who are new to SharePoint. If you have worked with SharePoint before, you might want to skip past that material.

Each chapter is divided into topics that group related skills. Each topic includes expository information followed by generic procedures. At the end of the chapter, you'll find a series of practice tasks you can complete on your own by using the skills taught in the chapter. The practice files for the practice tasks are available from this book's website.

## Download the practice files

Before you can complete the practice tasks in this book, you need to download the book's practice files to your computer from <https://aka.ms/SP2016SBS/downloads>. Follow the instructions on the webpage to install the files on your computer in the default practice file folder structure.



**IMPORTANT** The SharePoint 2016 software is not available from the book's website. You must have access to a SharePoint Server 2016 deployment before performing the practice tasks in this book. Alternatively, you can use SharePoint Online for most practice tasks in this book.

Whenever possible, we start each set of practice tasks with a standard SharePoint 2016 team site, which occasionally must be a top-level team site. If you perform all the practice tasks in all the chapters, you might choose to start with a new team site for every chapter.

However, the practice tasks in Chapters 2 and 5 require additional settings for their practice sites. This is where the starter WSP files will come in handy. The starter WSP files contain lists, libraries, files, and pages that are needed for the practice tasks in the chapter. If you have sufficient rights, you can create a new practice site from the chapter's starter WSP file by following the detailed step-by-step installation instructions in the setup guide that is provided in the chapter's practice folder.

The following table lists the practice files supplied for this book.

Chapter	Folder	File
1: Introduction to SharePoint 2016	Ch01	None
2: Navigate SharePoint sites	Ch02	Chapter2_Setup.pdf Chapter2FacilitiesSubsite.wsp Chapter2TeamSite.wsp Chapter2TravelSubsite.wsp WideWorldTravelGuidelines.docx
3: Work with content in lists and libraries	Ch03	OakChest.docx OakDesk.docx OakEndTable.docx OakNightStand.docx WideWorldPurchaseOrder.docx
4: Make lists and libraries work for you	Ch04	Global Proposal.docx Invoice.docx Project.docx
5: Search for information and people	Ch05	Chapter5_Setup.pdf Chapter5.wsp
6: Work with My Site and OneDrive for Business	Ch06	WideWorldImportersExpenses.docx
7: Work with webpages	Ch07	pjcov.jpg Wildlife.wmv
8: Create and manage sites	Ch08	None
9: Work with wikis, blogs, and community sites	Ch09	Sales.jpg
10: Manage work tasks	Ch10	None
11: Work with workflows	Ch11	None
12: Collaborate with Office programs by using SharePoint	Ch12	Furniture_Price.xlsx Sales_Figures.xlsx
13: Work with business intelligence	Ch13	SalesData.xlsx
14: Manage and monitor content	Ch14	HolidayPlanner.xlsx WWI_Financials.xlsx WWI_HolidayPlanner.xlsx WWI_Presentation.pptx WWI_ProductSheet.docx

The practice tasks in this book cover features across SharePoint 2016 solutions deployed on-premises and SharePoint Online.

SharePoint Server 2016 solutions provide different sets of features and functionality depending on the client access licenses (CALs) activated in your organization. There are two SharePoint Server 2016 CALs, as follows:

- SharePoint Server 2016 Standard CAL
- SharePoint Server 2016 Enterprise CAL

SharePoint Online standalone subscription plans provide different sets of features and functionality depending on the plan you are subscribed to. There are two SharePoint Online plans, as follows:

- SharePoint Online subscription plan P1
- SharePoint Online subscription plan P2

To complete a practice task in this book, you need a SharePoint 2016 on-premises solution or SharePoint Online subscription plan that includes the SharePoint features used in that practice task.



**SEE ALSO** For a list of the SharePoint 2016 solutions (Standard or Enterprise) and SharePoint Online plans (P1 or P2) you can use to complete each practice task, refer to Appendix B in the downloadable content. (The downloadable content for this book is available from the book's Microsoft Press website at <https://aka.ms/SP2016SBS/downloads>.)

All practice tasks will work in SharePoint Server 2016 Enterprise. All practice tasks that cover features included in SharePoint Server 2016 Standard will work in SharePoint Server 2016 Standard. If you are using SharePoint Server 2016 Standard and a feature is not available in it, you will not be able to complete practice tasks that cover that feature. For example, the business intelligence features are available only in SharePoint Server 2016 Enterprise; therefore, the practice tasks in Chapter 13, "Work with business intelligence," require SharePoint Server 2016 Enterprise.

All practice tasks that cover features included in SharePoint Online P2 will work in SharePoint Online P2. Equally, all practice tasks that cover features included in SharePoint Online P1 will work in SharePoint Online P1. If you are using SharePoint Online P1 and a feature is not available in it, you will not be able to complete practice tasks that cover that feature. For example, the business intelligence features are only

available in SharePoint Online P2; therefore, the practice tasks in Chapter 13, “Work with business intelligence,” require SharePoint Online P2.



**SEE ALSO** For SharePoint 2016 and SharePoint Online feature availability across solutions and subscription plans, refer to Appendix C in the downloadable content. (The downloadable content for this book is available from the book’s Microsoft Press website at <https://aka.ms/SP2016SBS/downloads>.)

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# Work with content in lists and libraries

## 3

Microsoft SharePoint lists and libraries provide information management and collaboration capabilities. You can think of SharePoint 2016 lists as spreadsheets that you and your coworkers can simultaneously use. SharePoint lists represent editable, web-based tables that facilitate concurrent, multi-user interactions against a common, centralized, extensible set of columns and rows. All of the webpages you need to create, review, update, delete, and manage lists and their data are automatically and dynamically generated by SharePoint.

One of the most compelling features that SharePoint 2016 provides is libraries. A library can be thought of as a list of files. Just as lists provide an effective way to work with all types of data they contain, SharePoint libraries function similarly for documents and files, such as Microsoft Word documents. By using SharePoint document libraries, you can filter and group documents and view metadata for documents stored in the library.

This chapter guides you through procedures related to discovering lists and libraries in a site, creating and populating lists and libraries, checking files out and working with versions, organizing lists and libraries, deleting and restoring list items and documents, staying up to date with content changes, and working offline.

## In this chapter

- Discover lists and libraries in a site
- Create and populate lists
- Create and populate libraries
- Check files out and work with versions
- Organize lists and libraries
- Delete and restore list items and documents
- Stay up to date with content changes
- Work offline

## Practice files

For this chapter, use the practice files from the SP2016SBS\Ch03 folder. For practice file download instructions, see the introduction.

## Discover lists and libraries in a site






SharePoint 2016 includes several templates that you can use to create the default types of lists and libraries. In SharePoint, each list and library is implemented as an app. You can choose a template app from the list and library apps available in the Your Apps page to generate a new list or library with a specific predefined functionality and set of columns. Each list or library app has a specific purpose, and its tile visually indicates the type of list or library the app will create. Later in this chapter, the “Organize lists and libraries” topic explores how to add, alter, and delete columns in lists and libraries; most default columns can be altered or deleted, even after data has been entered into them.

There are 20 list apps and 10 library apps provided by SharePoint 2016; these are described in the following table.



**TIP** Your site might provide a different number of default list and library apps, depending on your SharePoint 2016 edition, the enabled features, or the Microsoft Office 365 plan that your organization subscribes to.










### List apps









Tile	List app	Description
	Announcements	Create an announcements list when you want a place to share news, status, and other short bits of information.
	Calendar	Create a calendar list when you want a calendar-based view of upcoming meetings, deadlines, and other important events. You can share information between your Calendar list and Microsoft Outlook.
	Circulations	Create a circulations list when you want publications to be sent to specific recipients. This list contains many unique capabilities for distributing information to these selected users.
	Contacts	Create a contacts list when you want to manage information about people your team works with, such as customers or partners. You can share information between your contacts list and Outlook.
	Custom List	Create a custom list when you want to specify your own columns. The list opens as a webpage on which you can add or edit items one at a time.

---

**List apps**


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Tile	List app	Description
	Custom List In Datasheet View	Create a custom list in Datasheet view when you want to specify your own columns. The list opens in a spreadsheet-like environment for convenient data entry, editing, and formatting.
	Discussion Board	Create a discussion board when you want to provide a place for newsgroup-style discussion. Discussion boards provide features for managing discussion threads and ensuring that only approved posts appear.
	External List	Create an external list to work with data that is stored outside of SharePoint, but that you can read and write within SharePoint. The data source for an External List is called an External content type. Unlike a native SharePoint list, an External List uses Business Connectivity Services to access data directly from an external system.
	Import Spreadsheet	Import a spreadsheet when you want to create a list that has the same columns and contents as an existing spreadsheet. Importing a spreadsheet requires Microsoft Excel.
	Issue Tracking	Create an issue tracking list when you want to manage a set of issues or problems. You can assign, prioritize, and follow the progress of issues from start to finish.
	KPI List	Create a KPI list to track key performance indicators (KPIs) and to display the status of each indicator on a dashboard page. You can set up KPI lists to track performance by using one of four data sources: manually entered data, data in a SharePoint list, data in an Excel workbook, or data from Microsoft SQL Server Analysis Services (SSAS).
	Languages And Translators	Create a languages and translators list to use with a Translation Management workflow. The workflow uses the list to assign translation tasks to the translator specified in the list for each language.
	Links	Create a links list when you have links to webpages or other resources that you want to share.
	Microsoft IME Dictionary List	Create a Microsoft IME dictionary list (IME stands for Input Method Editor) when you want to use data in the list as a Microsoft IME dictionary.

List apps		
Tile	List app	Description
	PerformancePoint Content List	Create a PerformancePoint content list to store dashboard items, such as scorecards, reports, filters, dashboard pages, and other dashboard items that you create by using PerformancePoint Dashboard Designer.
	Project Tasks	Create a Project Tasks list when you want a graphical view (a Gantt chart) of a group of work items that you or your team needs to complete. You can share information between your Project Tasks list and Outlook.
	Promoted Links	Create a Project Tasks list when you want a graphical view (a Gantt chart) of a group of work items that you or your team needs to complete. You can share information between your Project Tasks list and Outlook.
	Status list	Create a status list to display and track the goals of your project. The list includes a set of colored icons to communicate the degree to which goals are met.
	Survey	Create a survey when you want to poll other users of the website. Surveys provide features that you can use to quickly create questions and define how users specify their answers.
	Tasks	Create a tasks list when you want to track a group of work items that you or your team must complete.
Library apps		
Tile	Library app	Description
	Asset Library	Create an asset library to share and manage digital media assets, such as image, audio, and video files. An asset library provides content types, with properties and views such as thumbnails and metadata keywords for managing and browsing media assets.
	Dashboards Library	Create a dashboards library to contain PerformancePoint-deployed dashboards.

---

**Library apps**


---

Tile	Library app	Description
	Data Connection Library	Create a data connection library to simplify the maintenance and management of data connections. A data connection library is a centralized place to store Office Data Connection (ODC) files. Each of these files (which have an .odc extension) contains information about how to locate, log on to, query, and access an external data source.
	Document Library	Create a document library when you have a collection of documents or other files that you want to share. Document libraries support features such as folders, versioning, and checking out.
	Form Library	Create a form library when you have XML-based business forms, such as status reports or purchase orders, that you want to manage. These libraries require an XML editor, such as Microsoft InfoPath.
	Picture Library	Create a picture library when you have pictures you want to share. Picture libraries provide special features for managing and displaying pictures.
	Record Library	Create a record library to keep a central repository for storing and managing your organization's records or important business documents. You can set policies that determine what records to store, how to route and manage the documents, and how long these records must be retained.
	Report Library	Create a report library to simplify the creation, management, and delivery of webpages, documents, and KPIs of metrics and goals. The report library is a central place where you can create and save reports and dashboards.
	Process Diagram Library	Create a process diagram library to store and share process diagram documents, such as those created with Microsoft Visio.
	Wiki Page Library	Create a wiki page library when you want to have an interconnected collection of wiki pages that multiple people can use to gather information in a format that is easy to create and modify. Wiki page libraries support pictures, tables, hyperlinks, and internal wiki linking.

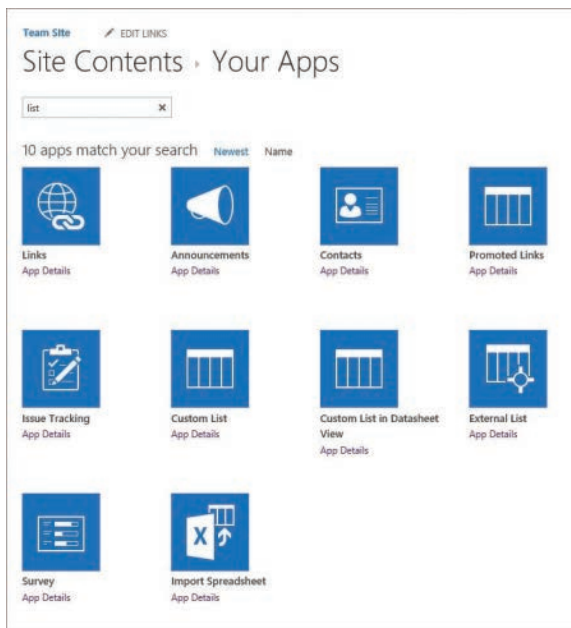
---

### To display all apps available on your site

1. Go to the Your Apps page by doing any of the following:
  - On the **Settings** menu, select **Add an app**.
  - On the Quick Launch, select **Site Contents**, and then on the **Site Contents** page, select the **add an app** tile.
  - On the **Get started with your site** page, select the **Add lists, libraries, and other apps** tile.

### To display the list apps available on your site

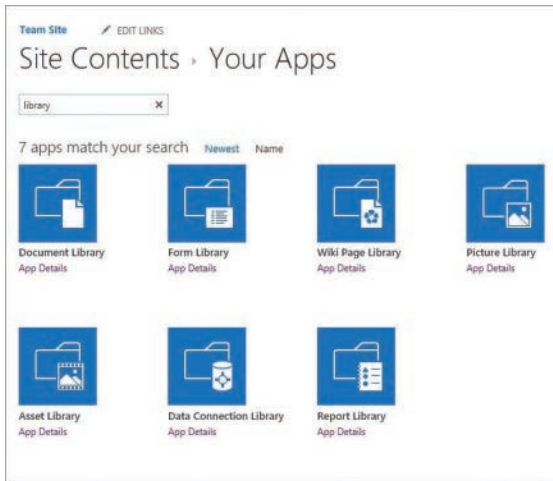
1. Display the **Your Apps** page.
2. In the search box at the top of the page, enter **list**.
3. Press **Enter** on the keyboard or select the **Search** icon.



*Your SharePoint setup determines which list apps are available on your site*

### To display the library apps available on your site

1. Display the **Your Apps** page.
2. In the search box at the top of the page, enter **library**.
3. Press **Enter** on the keyboard or select the **Search** button to start the search.



*Your SharePoint setup determines which library apps are available on your site*

3

## Create and populate lists

SharePoint lists empower you to provision your own repositories of structured information in which list items behave like rows consisting of self-labeled columns. After you've provisioned a list, you can create and edit list items in several ways, either one by one by using a form on a separate page, or within the list page in a grid that is similar to a spreadsheet.

### Create lists

The first step in creating a new list is to ask yourself, "What kind of information do I want to gather (or display)?" The answer to this question will help you determine which list app to choose. Perhaps you want to start with a list that is close to your end goal and then add, delete, and alter the default columns to provide the solution you are trying to achieve. For example, if you are planning to collect information such as names and addresses, you can choose the Contacts list app to create your initial list, and then modify it. Or perhaps you want to start with a bare-bones list and build it entirely from scratch. In that case, you would likely choose the Custom List app to create your initial list.



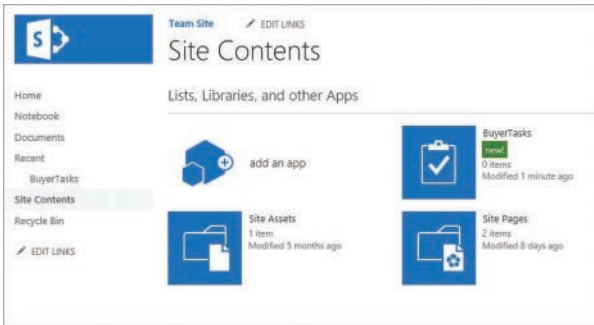
**TIP** If the list items in the list you want to create always contain files, consider using a document library instead of a list.



When you create a list, a new tile for the list is added to the Site Contents page, with a green “new” icon to the right of the tile. A link to the new list is shown on the Quick Launch, in the Recent section.



**TIP** The link to the new list in the Recent section on the Quick Launch is displayed temporarily. When more lists and libraries are created, their links take precedence over the older ones in the Recent section. The Recent section displays five of the newest links.



*The Site Contents page with a new tile for the new BuyerTasks list and a new BuyerTasks link in the Recent section on the Quick Launch*

When you initially create a list in SharePoint, you are establishing two name values: the display name, usually labeled *Name* or *Title*; and the URL name, also known as the internal name. The display name is used to populate both names. However, only the display name can be changed after the list is created.

After the list has been created, it is often useful to modify a list’s display name so that it is more descriptive than the initial name that is used in the URL. The revisions to the list name only affect the display name and not the URL name. For example, if the list was named *BuyerTasks* without a space between *Buyer* and *Tasks*, it would be useful to change the display name so that it has a space in it.



**TIP** Best practices to follow when initially naming a list in SharePoint include the following: The initial name should be descriptive, intuitive, and easy to remember. It should be concise and should not contain spaces (a space gets converted to %20 in the URL). The initial name should be consistently used throughout the site. Your organization might also have specific naming conventions that you will want to follow.

### To create a list

1. Display the **Your Apps** page.
2. Select the tile for the type of list you want to create, such as Tasks or Contacts. The Adding dialog box opens.

- In the **Name** box, enter a display name for the new list. This box also supplies the value that SharePoint uses for the new list's URL.

*Creating a new Tasks list*

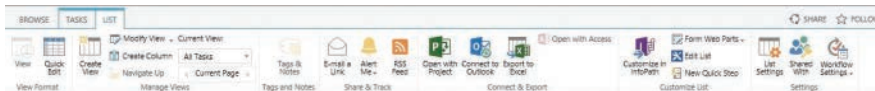
- Select **Create**.



**TIP** Selecting Advanced Options allows you to provide both a name and a description for your new list at the time of creation. You can change the list name and description after the list has been created.

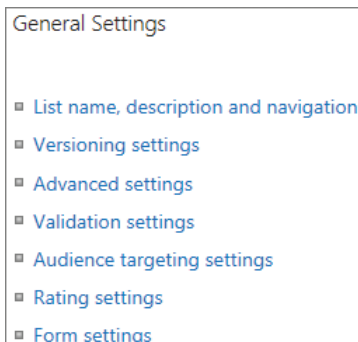
### To change the display name of a list

- On the Settings menu, select **Site Contents** to go to the Site Contents page.
- Locate the tile for the list whose display name you want to change, and select the tile to go to the default list view page for the list.
- In the upper-left of the page, select the **List** tab, and then at the right end of the **List** tab, in the **Settings** group, select **List Settings**.



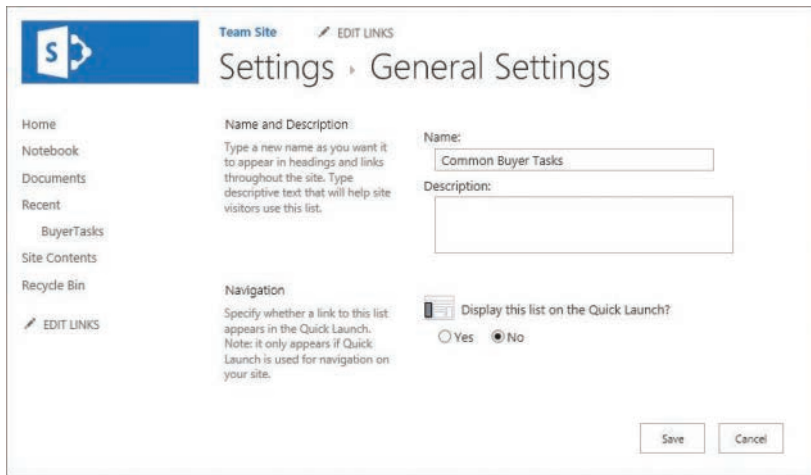
*Select List to display the List tab*

- On the **Settings** page, in the **General Settings** area, select **List name, description and navigation**.



*Selecting List Name, Description And Navigation in the General Settings area in the Settings page for a list*

5. On the **General Settings** page, in the **Name** box, replace the initial list name by entering a new display name.



The General Settings page, with Common Buyer Tasks entered in the Name box



**TIP** On the General Settings page, you can enter the list description and choose to permanently display the list link on the Quick Launch.

6. Select **Save** to save the change.



**TIP** Notice that the list name on the top of the page and the link on the Quick Launch now reflect the modified display name. However, if you navigate to the list default page, you can see that the browser's address bar still reflects the initial name (internal name) given to the list when it was created.

## Add and edit list items

Creating a SharePoint list automatically generates the pages you need to view the list as a whole, view a list item, add a new list item, and edit an existing list item.

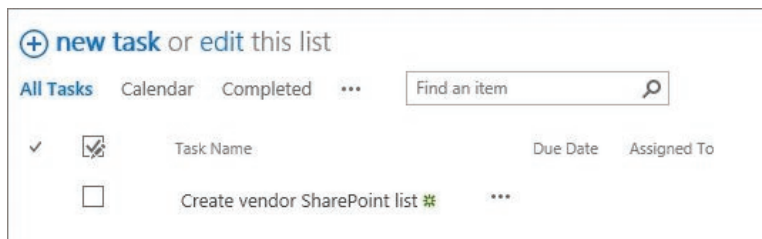
A *view* defines how the information in a list or library is displayed to the users. Although some lists only have a single view when they are created, SharePoint generates multiple list views for others. For example, when a new Tasks list is created, the following seven list views are generated: All Tasks (the default), Calendar, Completed, Gantt Chart, Late Tasks, My Tasks, and Upcoming. You can navigate to a list default view page from other locations by selecting the list name on the Quick Launch. When you display a list, several links for the views available for that list are shown at the top of the list. You can display more links to list views by selecting the ellipsis to the right of the displayed view links.

You can create and edit list items individually by using a form on a separate page, or you can create and edit items within the list page, in a grid that is similar to working in Excel. The grid is referred to as a datasheet view, also known as a Quick Edit view or just a Quick Edit. It is handy when you need to add or edit multiple list items.



**TIP** When you use Quick Edit, you can only enter values for columns featured in the view you are currently using. When you use list item forms, you can enter values into all available columns.

After you have created a list item, the new item is displayed on the list default view page with a green icon to its right.



*A new list item on a Task list page*

Occasionally, you might want to attach one or more documents to a list item. You can do so by using the Attach File command on the Items tab. By default, all lists in SharePoint allow attachments. However, if every list item always has one and only one document, reconsider the use of a list and opt for a document library instead.

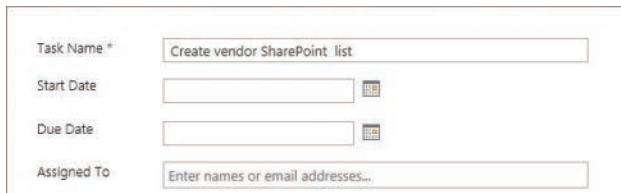
### To add a list item

- Go to the list's default view page and do one of the following:
  - In the body of the page, at the top of the list, select the **plus sign**.
  - In the body of the page, at the top of the list, select **new item**. (In a Tasks list, the new item link is displayed as *New Task*.)

*The New Task link*

- On the **Items** tab of the ribbon, select **New Item**. (In a Tasks list, the Items tab is named *Tasks*.)

2. On the list item page, provide the list item details. For example, if you are creating a new task, in the **Task Name** box, enter the new task name.

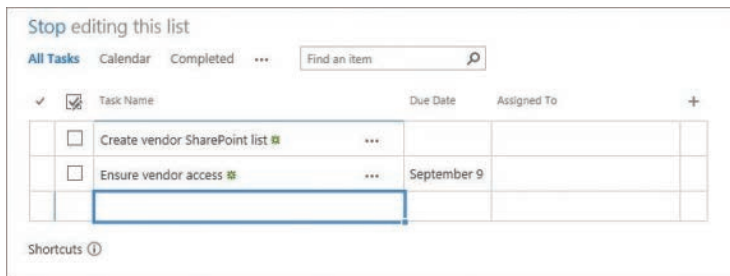


*Creating a new task*

3. Select **Save** to save the new item and return to the list default view page.

### To add list items in a Quick Edit view

1. Open the list default view page.
2. In the body of the page, select **edit** to the right of the **new item** (or **new task**) link to display the list as a grid in the Quick Edit view (also known as the data-sheet view), with a new empty row at the bottom.
3. Fill in the details of the new list item in the empty row. For example, for a new task, enter a name in the **Task Name** column and a date for when the task is due in the **Due Date** column.



*Creating a list item in the Quick Edit view*



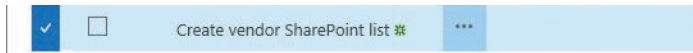
**TIP** In Quick Edit, you can enter values only for columns featured in the view you are using. In list item forms, you can enter values into all available columns.

You can use the empty row at the bottom of the grid to add more list items if you want to.

4. When you have finished adding items, select **Stop** at the top of the list to return to the default view.

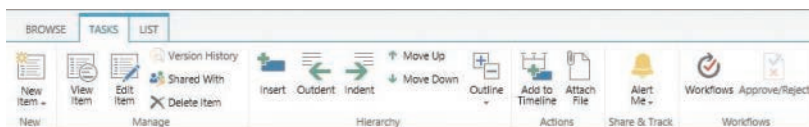
## To edit a list item

1. On the list default view page, select the list item you want to edit by clicking or tapping in its leftmost column.



*Selecting a list item*

2. Select *Items* at the top of the page to display the ribbon. (The actual name of the *Items* tab depends on the type of list you are working with—for example, it could be called *Tasks* or *Contacts*.)



*The Tasks tab*

3. In the **Manage** group, select **Edit Item** to open the list item page in edit mode.
4. Make the changes you want. For example, in a **Tasks** list, for a completed task, you can enter **100** in the **% Complete** box to mark the task as completed.

*Editing a list item*

5. When you have finished making your edits, select **Save** to return to the list default page.

## To attach a document to a list item

1. Open the list default view page.
2. In the body of the page, select the list item you want to attach a document to by clicking or tapping in its leftmost column.
3. On the *Items* tab, in the **Action** group, select **Attach File** to open the Attach File dialog box.

*Attaching a file*

4. Select **Browse** to open the Choose File To Upload dialog box.
5. Navigate to the file you want to attach to the list item, and select **Open** to return to the Attach File dialog box. The location of the selected document is displayed in the Name box.



**IMPORTANT** At this point, the document is only associated with the list item in memory. Closing the browser abandons the attachment. You must select OK to save the attachment's association with this task.

6. Select **OK** to upload the document and attach it to the list item.

## Create and populate libraries

A library is a location in a site where you can create, collect, update, and manage documents and other files with other team members. Each library displays a list of files and key information about the files, which helps people use the files to work together. In the business world, being able to work with documents quickly and effectively is of paramount importance.

You can use libraries to store your documents and other files on a SharePoint site rather than on your local computer's hard drive, so that coworkers can find and work with them more easily. Libraries are used to store files, whereas lists are used to store other types of content. Like lists, libraries contain metadata stored in columns that you can use to filter, sort, and group the items.

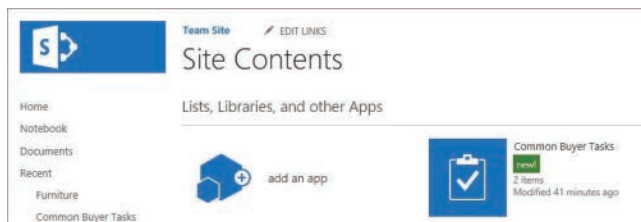
After you have created a library, you can populate it with files. For example, you can upload existing documents into a document library, or you can create new documents from within the library based on the default document template for the library. After documents are placed in the library, you can search and filter them to make it easier to find what you are looking for, and you can collaborate with others to help develop the final version of a document. You can edit documents in a SharePoint library by using an Office client program such as Word or an Office Online program such as Word Online.

### Create libraries

When you create a new SharePoint team site, a generic document library called *Documents* is created. Because this library lacks a descriptive name, a best practice is to create a new library for a particular business category or subject instead of just using the Documents library for your documents. Make sure that the names of your

document libraries are descriptive and that each library has a specific topic, to make it easier to find documents. Storing all documents together in the default Documents library—or any one document library—defeats the purpose of using SharePoint sites to make information easier to locate.

When a library is created, a new tile for this library is added to the Site Contents page with a green “new” icon to the right of the tile. A link to the new library is shown on the Quick Launch, in the Recent section.



*The Site Contents page with a new tile for the newly created Furniture library and a new link to the library in the Recent section on the Quick Launch*

The procedure in this section also applies to creating types of libraries other than document libraries.

### To create a library

1. Display the **Your Apps** page.
2. Select the tile for the type of library you want to create, such as **Document Library**. The Adding Library dialog opens.
3. In the **Name** box, enter a name for the new library, such as *Furniture*.



*Creating a new library*

4. Select **Create**.



## Upload existing files

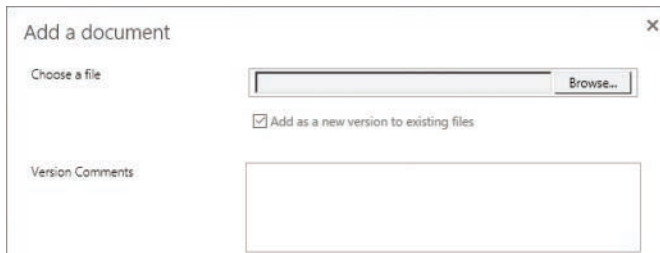
There are several ways to add existing files to a library, including the following:

- You can use your browser to upload files to the library via the SharePoint interface.
- You can use File Explorer to copy or move files into the library, such as by dragging them from your desktop or any other location to SharePoint.
- You can use sync to upload files that are stored offline.

This section focuses on the first two methods: using your browser and using File Explorer. The “Work offline” topic later in this chapter covers using sync to add a file to a library.

### To add a file to a library by using a browser

1. Go to a library you want to add a file to.
2. Do one of the following to open the Add A Document dialog:
  - In the library, in the body of the page, select **Upload**.
  - On the keyboard, press **Alt+U**.



*Uploading a file to a library*

3. Select **Browse** to open the Open dialog, browse to the file you want to upload, select the file, and then select **Open**.



**TIP** You can upload a file of up to 10 gigabytes (GB) in size.

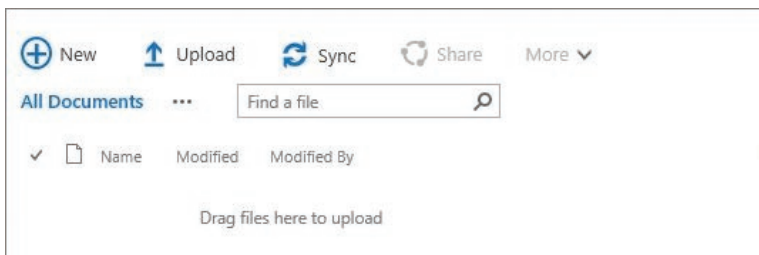
4. In the **Add a document** dialog, select **OK** to confirm the upload and return to the library.



**TIP** You can add one file at a time by using this method. To upload multiple files at the same time, use the dragging method or the copy-and-paste methods covered in the next two procedures.

## To add files to a library by dragging

1. In a library you want to add files to, open File Explorer, and navigate to the folder where the files you want to add are located.
2. Position the File Explorer window next to the browser window displaying the library so that you can drag files from File Explorer to the browser.
3. In File Explorer, select the files to upload by doing one of the following:
  - To add one file, select the file.
  - To add multiple files, press and hold down the **Ctrl** key when you select the files.
4. Drag the files to the library in the browser window, to where it says **Drag files here to upload**.



*Drag files to where it says "Drag files here to upload"*

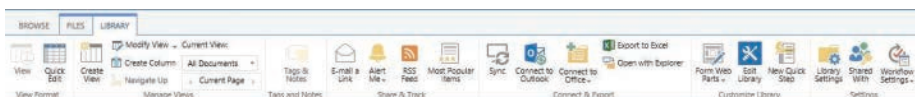


**TIP** When you drag files into a browser window, the Drop Here box appears, identifying the broader area on the page where you can drop the files.

5. After the upload, select **Dismiss** at the top of the documents list to dismiss the confirmation message that an upload has been completed.

## To add files to a library by using copy and paste

1. In a library you want to add a file or files to, on the **Library** tab, in the **Connect and Export** group, select **Open with Explorer**.



*The Library tab*

The library content is displayed in File Explorer. Displaying the SharePoint library content in File Explorer is referred to as an Explorer View.



**TIP** The Open With Explorer button is typically disabled for an unsupported browser or unsupported operating system. If the button is unavailable, your browser might not be compatible with SharePoint.

2. Open another instance of File Explorer, navigate to the folder where the files you want to add are located, and select the files.
3. Copy the files by doing one of the following:
  - In File Explorer, from the shortcut menu, select **Copy**.
  - Press **Ctrl+C** on the keyboard.



**TIP** When you cut and paste, you are moving the file. When you copy and paste, or drag from File Explorer to a SharePoint library, you are copying the file.

4. Go to the File Explorer window that is displaying the library files, and do one of the following to add the files to the library:
  - From the document's shortcut menu, select **Paste**.
  - Press **Ctrl+V** on the keyboard.



**TIP** In the browser where the library is displayed, refresh the page to verify that the files are listed in the library.

## Create documents from a library

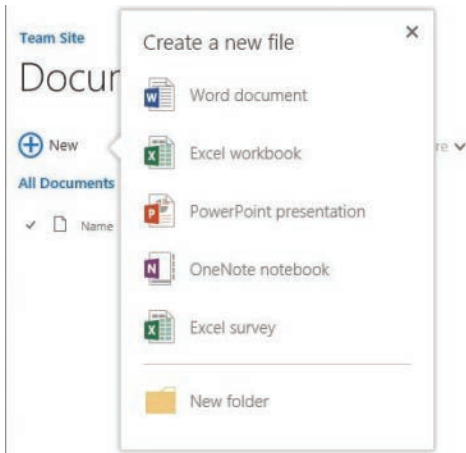
You can create new Office documents directly from a SharePoint library. A new document will be based on a default template for the library.

You can create a new document in the Office client program, such as Word, if it is installed on your device. You can also create it in your browser, by using an Office Online program such as Word Online.

### To create a document from a library by using an Office Online program such as Word Online

1. Go to a library in which you want to create a document.
2. Do one of the following:
  - In the document library, in the body of the page, select **New**.
  - On the keyboard, press **Alt+N**.

3. Select the type of document you want to create.

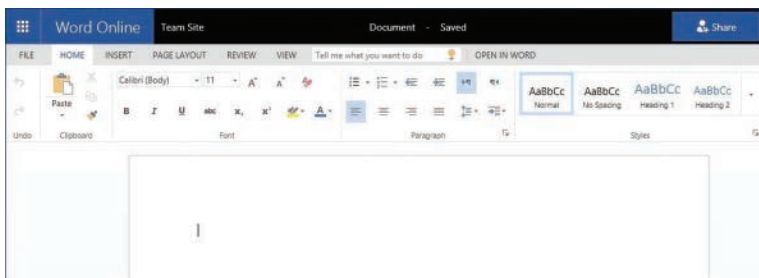


*Types of Office documents that can be created from a library*

A new document opens in the Office Online program you selected. For example, selecting Word Document opens Word Online.



**IMPORTANT** At the time of writing, selecting a type of document is available in SharePoint Online. In SharePoint on-premises, selecting the New link displays the Add A Document dialog that you can use to upload a file, as discussed in the previous section, rather than create a new document.



*A new document in Word Online*



**TIP** Depending on your server settings, the new document will open either in your browser in Word Online or in the Word client program, if it is installed on your device. If the new document opens in the Word client, go the next procedure. Otherwise, continue to the next step.

4. The new document is automatically saved in the library with the default name that is shown in the title bar, such as *Document*. To rename the document, select its name in the title bar, enter the new name, and then press **Enter**.
5. Add the content you want to the new document.



**TIP** If you require access to features that are available only in the full Office program, you can switch to the full Office client program. For example, in Word Online, select Open In Word to continue working on the document in Word.

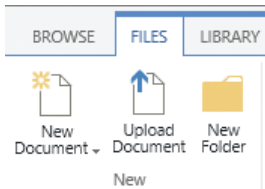
6. When you're done, return to the library where the file is saved by doing one of the following:
  - Select the site link in the title bar, to the left of the file name.
  - Select the **Back** button in your browser.
7. On the library page, select **Refresh** to confirm that your new document is now listed in the library.

## Office Online programs

The Office Online programs, or apps, are part of Office 365 and are available if you are using SharePoint Online. If you are using SharePoint 2016 on-premises, the Office Online Server (OOS) in your organization must be installed and activated before you can create or edit documents in the Office Online programs such as Word Online, Excel Online, PowerPoint Online, and OneNote Online. If OOS is installed and activated, you can view and, depending on your organization's license terms, edit Office documents by using a supported web browser on computers and on various mobile devices and tablets, such as Windows Phones, iPhones, iPads, and Android tablets and phones. The Office Online programs can be used from any device where a browser is available; however, they have less functionality in comparison with Office client programs such as Word, Excel, PowerPoint, and OneNote.

## To create a document from a library by using Word

1. Go to a library in which you want to create a document.
2. On the **Files** tab, in the **New** group, select **New Document**.



*The New group on the Files tab*



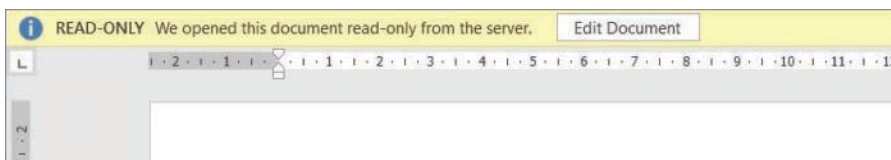
**TIP** Depending on your server settings, the new document will open either in the Word client program or in Word Online. If the new document opens in Word Online, select **Edit In Word** on the title bar.

3. A new document opens in the Word client program. If a warning about allowing this website to open a program on your device appears, select **Allow**.



**TIP** New Word documents created from SharePoint are based on the default template for the SharePoint library, which is called *template.dotx*. If a warning about this template appears, select **Yes** to confirm that you want to proceed with opening a file.

4. If prompted, provide your user name and password for the SharePoint site.
5. If a **Read-Only** banner appears at the top of the document, select **Edit Document**.



*The Read-Only banner that appears when a SharePoint document is opened in Word*

6. Add the content you want to the new document.
7. When you're done, go to the **File** tab and select **Save** to save the document to the document library.

8. To name the file, under **Current Folder**, select the library to open the Save As dialog box. Note that the location points to the document library.
9. Enter the name of the new document, and then select **Save**.
10. In the browser, refresh the library page to confirm that your new document is listed in the library.

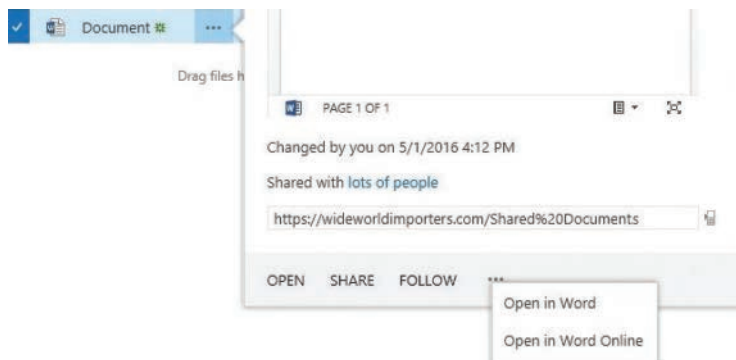
## Edit documents

In SharePoint, you can edit documents in Office client programs such as Word and Excel or in your browser by using Office Online apps that provide online companion web apps to Office client programs, such as Word Online or Excel Online. (For more information, see the “Office Online programs” sidebar earlier in this topic.)

When you’re on the move, it is often very useful to be able to edit your documents within a browser, without the need for the client program to be installed on the device you’re using.

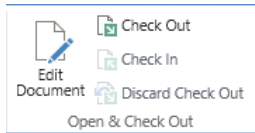
### To edit a document in an Office client program from a library

1. Go to the library that contains the document you want to edit.
2. Open the document for editing in the Office client program by doing one of the following:
  - Select the ellipsis to the right of the document’s name, and in the callout that opens, do one of the following:
    - Select **Open**.
    - Select the ellipsis, and then select **Open in Word**.



*Opening a Word document for editing in the Word client*

- Display the document's shortcut menu, and then select **Open in Word**.
- Select the document by clicking or tapping in its leftmost column, go to the **Files** tab, and then select **Edit Document**.



*The Edit Document button on the Files tab*



**TIP** Depending on your server settings, you might be able to just click or tap the document you want to edit to open it. The document will open in either the Office Online app in your browser, or in the Office client program, if it is installed on your device. If the document opens in Office Online in your browser, in the title bar, select Edit Document. If the document opens in Office Online for viewing, open the Edit Document menu and select Edit In Word. In either case, you can then continue to the next step.

3. The document opens in the Office client program such as Word. Do the following:
  - If a warning about allowing this website to open a program on your computer appears, select **Allow**.
  - If a warning about the document appears, select **Yes** to confirm that you want to proceed with opening a file.
  - If prompted, provide your user name and password for the SharePoint site.
  - If a **Read-Only** banner appears at the top of the document, select **Edit Document**.
4. In Word, edit the document.
5. On the **File** tab, select **Save** to save the document to the document library.

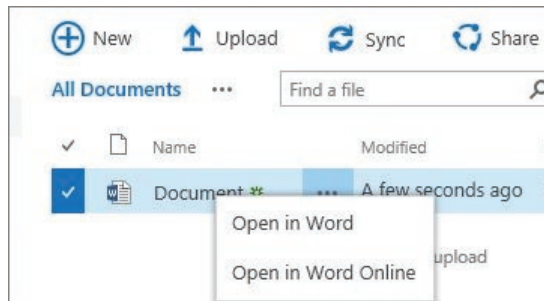


**TIP** You can configure whether your device opens a document within your browser or in the document's native Office client program. The default option is to open in a browser by using Office Online apps, such as Word Online, so that users can use their browsers to view their documents online. For on-premises deployments, this capability depends on Office Online programs being installed and activated on the server in your organization. For more details, see Chapter 4, "Make lists and libraries work for you."



### To edit a document in Office Online from a library

1. Go to the library that contains the document you want to edit.
2. Open the document in its corresponding Office Online app by doing one of the following:
  - Display the document's shortcut menu by right-clicking the document name, or on touch devices by pressing and holding the document name, and select **Open in Office App Online** (for example, Open In Word Online).



*Opening a document in Word Online*

- Select the ellipsis to the right of the document's name, and in the callout that opens, select the ellipsis, and then select **Open in Office App Online** (for example, Open In Word Online).
  - Click or tap the document you want to edit.
3. The document opens in Office Online. If the document opens for viewing, select **Edit Document** and then select **Edit in Office App Online** (for example, Edit In Word Online).

When you make your edits, the document is saved automatically.
  4. When you're done, return to the library where the file is saved by doing one of the following:
    - Select the site link in the title bar, to the left of the file name.
    - Select the **Back** button in your browser.
  5. In the library, select **Refresh** and confirm that the document has been saved to the library by checking its timestamp.



**TIP** If you open a document in Office Online and the Edit Document option is unavailable, it means that Office Online programs have not been activated for editing in your environment.

### To rename a file in a library

1. In the library that contains the file you want to rename, display the file's short-cut menu, and select **Rename**.
2. On the file page, enter a new name in the **Name** box, and select **Save**.



The image shows a form for renaming a document. It has two input fields: 'Name \*' and 'Title'. The 'Name \*' field contains the text 'Document' followed by a small 'x' icon and the file extension '.docx'. The 'Title' field is currently empty.

*Renaming a document*

## Check files out and work with versions

SharePoint 2016 provides several content management capabilities, including checking files in and out and version control.

### Check files in and out

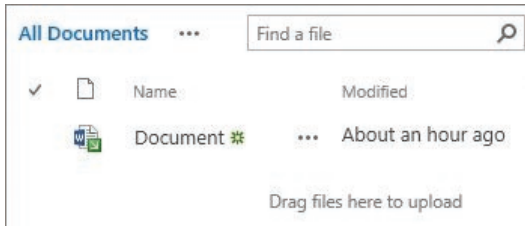
Checking out and checking in documents and other files lets others know what documents you are working on so that they don't work on them at the same time.

When you check out a file, you lock the file for editing to prevent other users from editing the file at the same time. When you are done editing the file, you check the file back in, allowing other users to edit the file. When you check in a document, you can also enter comments about what you've changed so that others can see them.

When you want to check out and edit a document, whether you plan to edit it online or download it to the client program, the following sequence is recommended:

1. Check out the document.
2. Download the document and open it in the client program, or open the document in an Office Online app.
3. Edit the document.
4. Upload the document, if necessary. (If you used Office Online, your edits are automatically saved.)
5. Check in the document.

When a document has been checked out, the file icon changes to include a green, downward-pointing arrow, indicating that the document is now checked out. No one else can change this document, and no one else can see your changes while you have it checked out.



*A checked-out document*



**TIP** Point to the file icon to display the name of the person that the file is checked out to.

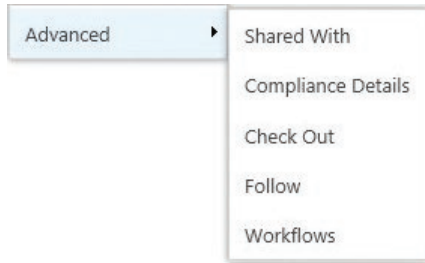
When a document is checked out to you, only you can do anything with the file. However, checking out a document is only the first step. You still need to open the file, download it, or edit it online. Finally, after you have finished your edits and saved the document back to the library, you need to check it back in.



**TIP** If you check out a file and don't make changes to it, or if you make changes that you don't want to keep, you can discard the checkout, rather than saving and checking in the file.

### To check a file out from a library

1. Go to a library where you want to check out a file.
2. Do either of the following:
  - Select the file or files that you want to check out by clicking or tapping in the column to the left of each file. Then, at the top of the page, select the **Files** tab, and in the **Open & Check Out** group, select **Check Out**.
  - Right-click (or on touch devices press and hold) the file that you want to check out, and on the shortcut menu, select **Advanced**, and then select **Check Out**.



*Display the Advanced shortcut menu by right-clicking or pressing and holding the file name and then selecting Advanced*

3

### To check a file in to a library

1. Go to the library where you want to check in a file.
2. Do either of the following:
  - Select the file that you want to check in by clicking or tapping in its leftmost column, go to the **Files** tab, and then in the **Open & Check Out** group, select **Check In**.
  - On the shortcut menu for the file you want to check in, select **Advanced**, and then select **Check In**.
3. In the **Check in** dialog, in the **Retain Check Out** area, select **Yes** if you want to do an interim check-in so you can continue working on the file. Otherwise, leave the default option **No** selected.



*The Check In dialog*

4. In the **Comments** box, enter a comment that describes the changes you made. Although this is optional, it is recommended as a best practice.
5. Select **OK**. The file is checked back in and the green arrow disappears from the file icon.

### To discard a checkout

1. Go to the library where you want to discard a checkout.
2. Do either of the following:
  - Select the file for which you want to discard the checkout by clicking or tapping in its leftmost column, go to the **Files** tab, and then in the **Open & Check Out** group, select **Discard Check Out**.
  - On the shortcut menu for the file that you want to check in, select **Advanced**, and then select **Discard Check Out**.
3. In the message box that appears, select **OK**.

## Work with version history

When versioning is enabled in your list or library, SharePoint 2016 creates a separate copy of the list item or document each time it is edited. With versioning, you can store, track, and restore items in a list and files in a library whenever they change. Although this takes up extra space on the server, it also makes it easy to revert to an older version of the list item or document if necessary.

A library can be configured to keep only major versions or both major and minor versions. Major versions are indicated with whole numbers, such as 1, 2, 3, and so on. Minor versions are indicated with decimals, such as 1.1, 1.2, 1.3, and so on. A major version number is associated with a version that has been published. A minor version number is associated with a version that is in progress but that has not yet been published.

Major versions are available for lists, but minor versions are not. Each version of a list item is numbered with a whole number.

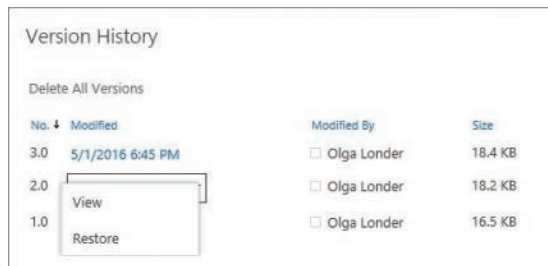
When you view a document's version history, SharePoint displays a list of the occasions when this document was edited and saved, and the author's comments on those changes. From this list you can restore an older version of the document. The restored version becomes the new current version.

### To view the version history of a file

1. Go to the library that contains the file.
2. Do either of the following:
  - Select the file by clicking or tapping in its leftmost column and then, on the **Files** tab, in the **Manage** group, select **Version History**.
  - Display the shortcut menu for the file, and then select **Version History**.

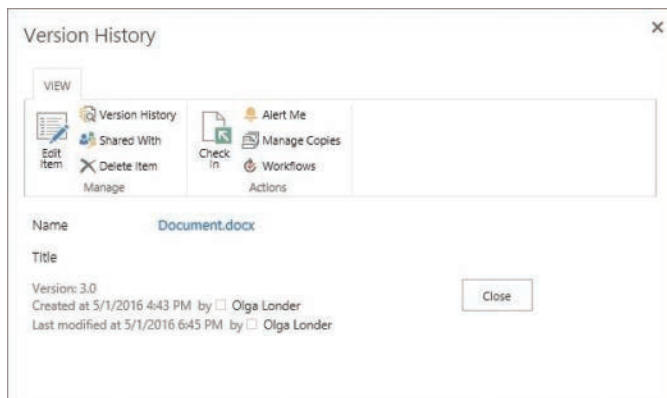
## To view an earlier version of a file without overwriting your current version

1. Display the version history of the file.
2. In the **Version History** dialog, do either of the following for the file version you want to view:
  - Select the date/time stamp of the file version.
  - Point to the date/time stamp of the file version, select the arrow that appears, and select **View** from the menu.



*The Version History dialog*

Then select the document name in the **Version History** form.



*The Version History form for a document that is checked out*

Depending on the settings in the library, the document opens for viewing in Word Online or as a read-only document in the Word client program, if it is installed on your device.

### To restore an earlier version of a file

1. Display the version history of the file.
2. In the **Version History** dialog, point to the date/time stamp of the file version, select the arrow that appears, and then select **Restore** from the menu.
3. In the confirmation dialog box, select **OK** to replace the current version with the selected version.



**TIP** There will now be a new version shown in the Version History dialog that is a copy of the earlier version that you have restored. If major versioning is enabled, this is the latest version that is published on the site. If minor versioning is enabled, the restored version is shown as an additional, unpublished version. SharePoint 2016 actually copies the version you want to restore and makes it the newest minor version. If you want to publish this version, you need to do so manually by using the Publish button on the ribbon.

4. Close the **Version History** dialog box to return to the library.

## Organize lists and libraries

When a list or a library grows to large number of items, you often need to organize the content so that you and other users can quickly find information.

You can organize your content into folders. In SharePoint 2016, you can create folders in libraries and lists.

You can also use columns in lists or libraries to group, categorize, sort, and filter information. You can create, change, hide, and delete the list and library columns.

These columns can be of multiple types, such as a single line of text, a drop-down list of options, a number that is calculated from other columns, and many others. You can create custom views to save the column and filter setup.

### Create folders in a list or a library

Using folders is a common way to organize documents efficiently. SharePoint 2016 provides other mechanisms for organization of your documents, including views and filters. However, many people are most familiar with folders and thus find it easier to create a folder structure.

### To create a new folder

1. Go to a library where you want to create a folder.
2. Do one of the following:
  - On the **Files** tab, in the **New** group, select **New Folder**.
  - In the body of the page, select **New**, and then select **New Folder**.



**TIP** You can create a new folder in most lists in the same way, by selecting **New Folder** in the **New** group on the **Items** tab. The list must be set up to allow creation of folders. The ability to create folders is a default setting for several lists, such as the **Links** list.

3. In the **Create a folder** dialog that opens, in the **Name** box, enter the name for the new folder, and then select **Create**.

*The Create A Folder dialog*

### Add, edit, and remove list and library columns

The list and library apps in SharePoint 2016 provide an easy way to generate a list or a library with very little effort. And if you need to customize the list and library views, you can easily add, edit, and remove list and library columns in addition to creating additional custom columns by using the Settings page for the list or library. In addition, for a list, you can use Quick Edit view to add new columns, without leaving the list page.

There are many types of columns that can be added to a list or a library, including columns for a single line of text, currency values, date and time, a Yes/No check box, and a drop-down list of options. You can hide a column from being displayed in a list or a library view, and most columns in a list or library can be deleted. However, there are some columns that you cannot delete. All lists have at least one column that cannot be deleted. For instance, the Title column can be renamed but not deleted. Some lists also prevent the deletion of certain columns, so that the list can be displayed properly or integrate with Office programs properly. For example, the Assigned To, Status, and Category columns of any list based on the Issues list app cannot be deleted, and none of the default columns in any list based on the Calendar list app can be deleted.



There are five columns that are automatically created and populated for each list item or file in a library that cannot be changed: ID, Created, Created By, Modified, and Modified By. The ID column ensures that the list or library item is unique in the list or library. It contains a sequential number beginning with 1 and increments by 1 for each new list or library item. SharePoint automatically captures when the list or library item was created, who it was created by, when it was last modified, and who it was last modified by. Initially, the Created and Modified columns are equal, as are the Created By and Modified By columns.

You can choose which columns are displayed in a list or library. This can be done both with custom and default columns. You can also change the order in which columns are displayed in a list or a library. When you remove a column from the view, it hides the column but does not delete it or the data it contains. If you want to delete a column and the data within the column (versus just hiding the column from the view), you can permanently delete the column from a list or a library.

### To create a new column in a list or a library

1. Go to the list or library where you want to create a new column.
2. On the **List** or **Library** tab, in the **Manage Views** group, select **Create Column** to open the Create Column page.
3. In the **Name and Type** section, in the **Column name** box, enter the name that you want for the column.

The screenshot shows the 'Create Column' page in SharePoint. The page is titled 'Create Column' and has a 'Name and Type' section. It includes a 'Column name' text box, a list of column types (Single line of text, Multiple lines of text, Choice, Number, Currency, Date and Time, Lookup, Yes/No, Person or Group, Hyperlink or Picture, Calculated, Task Outcome, External Data, Managed Metadata), and an 'Additional Column Settings' section with options for 'Require that this column contains information', 'Enforce unique values', 'Maximum number of characters', and 'Default value'.

*The Create Column page*

4. Under **The type of information in this column is**, select the type of information that the new column will contain.
5. In the **Additional Column Settings** section, in the **Description** box, provide a description (this is optional).



**TIP** Depending on the type of column you select, more options might appear in the Additional Column Settings section. Select additional settings as needed.

6. If the data in the column must be validated, select **Column Validation** to expand the Column Validation section.



**TIP** If the Column Validation section is not available, the selected type of column does not allow validation.

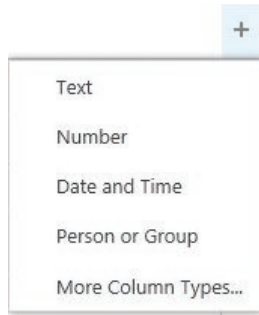
*The Column Validation section of the Create Column page*

7. Provide the formula that you want to use to validate the data, and the user message that you want to display to the users to help them provide the valid data.
8. Select **OK** to create the new column and return to the list or library page.

### To create a new column in the Quick Edit view

1. Go to a list or a library where you want to create a new column.
2. To switch to the Quick Edit view and display the list in a grid, do either of the following:
  - For a list, do one of the following:
    - At the top of the list, select **edit**.
    - Select **List** to open the ribbon, and then on the **List** tab, in the **View Format** group, select **Quick Edit**.
  - For a library, select **Library** to open the ribbon, and then on the **Library** tab, in the **View Format** group, select **Quick Edit**.

3. In the list or library header row, at the top of the rightmost column (which is empty), select the plus sign (+) to display the menu of column types.
4. Select the type of information that the new column will contain.



*The menu of column types in the Quick Edit view*

The new column is created and is named after its type (for example, *Number*). The name is displayed highlighted and boxed, showing that you can rename the column.

5. If you want, position your cursor within the box and enter a new name for the column.



**TIP** You can rename a column in Quick Edit at any time by selecting its name and then selecting **Rename Column** from the menu that appears.

### To modify how the list and library columns are displayed

1. Go to a list or a library where you want to change columns.
2. On the **List** tab or **Library** tab, in the **Manage Views** group, select **Modify View** to go to the **Edit View** page.
3. In the **Columns** section, do either of the following:
  - To change whether a column is displayed in a list or a library page or hidden from view, under the **Display** heading to the left of the name of the column you want to change, select or clear the check 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 checked="" type="checkbox"/>	Modified By	4
<input type="checkbox"/>	App Created By	5
<input type="checkbox"/>	App Modified By	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
<input type="checkbox"/>	Created	11
<input type="checkbox"/>	Created By	12
<input type="checkbox"/>	Edit (link to edit item)	13
<input type="checkbox"/>	File Size	14
<input type="checkbox"/>	Folder Child Count	15
<input type="checkbox"/>	ID	16
<input type="checkbox"/>	Item Child Count	17
<input type="checkbox"/>	Name (for use in forms)	18
<input type="checkbox"/>	Name (linked to document)	19
<input type="checkbox"/>	Shared With	20
<input type="checkbox"/>	Shared With Details	21
<input type="checkbox"/>	Title	22
<input type="checkbox"/>	Version	23

*The Columns section of the Edit View page*

- To change the order that a column appears on the list or library page, under the **Position from Left** heading for the column you want to change select the arrow to open the position number list, and then select the number that would show the new position of this column on the list or library page, counted from the left.
4. Repeat step 3 for all columns you want to modify, and then select **OK** to save your changes and return to the list or library page.

### To permanently delete a column and its data from a list or a library

1. On the **List Settings** or **Library Settings** page for the list or library, display the **Columns** section.
2. Select the name of the column that you want to delete.
3. Scroll to the bottom of the **Change Column** page, and select **Delete**.
4. In the confirmation box, select **OK**.



**TIP** Some columns in lists and libraries are required by SharePoint and can't be deleted, such as Title or Name. If the column can't be deleted, the Delete button is not available. If you can't delete a column, but you don't want the column to be displayed, you can hide it from view.

## Sort and filter lists and libraries

As a list or library grows, it eventually becomes difficult to see the entire list or library on a single page. To this end, SharePoint provides built-in sorting and filtering capabilities. On any standard list and library view page, individual column headings can be used to alphabetically sort the entire list in ascending or descending order.



**TIP** Selecting another column heading abandons the sort on the current column. You must use Quick Edit view to sort on more than one column.

Filtering on list and library pages works much like an Excel AutoFilter works. Each column has a filtering arrow in its upper-right corner, which appears when you point to the column heading. When you select the arrow, a unique list of the values for each column is generated and presented as a drop-down list above that column.

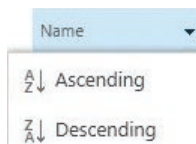


**TIP** In Quick Edit view, sorting and filtering are available by using the arrow also located in the upper-right corner of every column.

A list or library view is a selection of columns on a page that displays items in a list or library, and often defines a specific sort order, filter, grouping, and custom layout. Filters are cumulative but temporal; the next time a list view is chosen, its settings, including filters, will be applied to the list regardless of what was previously chosen. You can save the view that you have created by sorting and filtering a list or a library so that you can keep the sorting orders and filters and come back to it again.

### To sort a list or a library

1. In a list or a library in which you want to sort the items, do one of the following:
  - Select the column name. If the column has not had a sorting order applied, selecting its name will sort it in ascending order. To change the sort order, select the column name again.
  - Point to the name of the column by which you want to sort, select the arrow to the right of the column name, and select the sort order.

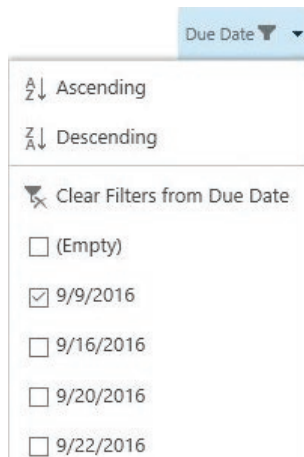


*The Sorting menu*

A thin arrow appears to the right of the column name, indicating that the list is sorted by this column. The arrow points up for ascending order, and down for descending order.

### To filter a list or a library

1. In a list or a library in which you want to filter the items, point to the name of the column that contains the data you want to filter, select the arrow next to the name, and then, from the list of the values, select the items you want to display.



*Filtering a column*

2. When you are done, select **Close**.



**TIP** To save your sort order and filters, you can create a list or a library view by using the Save This View option that appears in the upper-right corner of a list that has sorting or filtering applied. For more information about creating views, see Chapter 4, "Make lists and libraries work for you."

### To remove a filter from a list or library

1. Go to the list or library that you want to remove filtering from.
2. Locate the filtered column that you want to remove a filter from, point to the column heading, select the arrow at the right to display the filtering menu, and then select **Clear Filters from Column Name**.

## Delete and restore list items and documents

When documents, list items, folders, or even entire lists are deleted, they are simply flagged as removed so that they no longer appear in the site from which they were deleted. By default, all sites in SharePoint 2016 are configured to display deleted items in the site's Recycle Bin for 30 days. The Recycle Bin provides a safety net when you are deleting documents, document sets, list items, lists, folders, and files. If the user hasn't restored the deleted item in that time period, it is then permanently expunged from the database. If the user empties the Recycle Bin before the 30 days have elapsed, the deleted item is still available to a site collection administrator from the site collection's Recycle Bin.

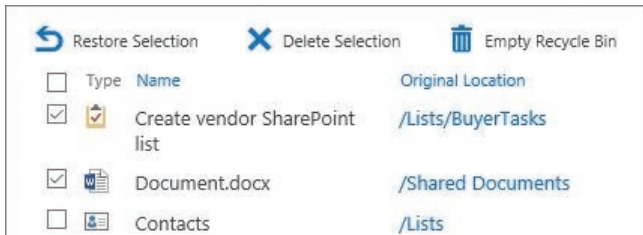
However, the total size of the deleted items must remain below a specified percentage (50 percent by default) of the total size that a site is allowed to consume (the site quota). If a newly deleted item causes the total to exceed the configured size allowed by the SharePoint central administrator, the items that were deleted first are purged even if 30 days have not elapsed, to make room for the newly deleted item. In this way, SharePoint administrators can make disaster recovery plans based on the Recycle Bin's allowable total maximum size. Of course, a SharePoint administrator can configure the number of days that the Recycle Bin retains deleted items, ranging from the default 30 days in SharePoint 2016 to a specific setting for a number of days, or to "never retain deleted items" or "never remove deleted items."

### To delete a list or library item

1. Go to the list or library in which you want to delete an item.
2. Select the item you want to delete. You can select multiple items.
3. Do one of the following:
  - For a list item, do either of the following:
    - On the **Items** tab of the ribbon, in the **Manage** group, select **Delete Items**.
    - Select the ellipsis to the left of the item's name, and in the callout that opens, select the ellipsis again, and then select **Delete Item**.
  - For a document, do either of the following:
    - On the **Files** tab of the ribbon, in the **Manage** group, select **Delete Document**.
    - Display the shortcut menu for the selected document, and select **Delete**.
4. In the confirmation dialog, select **OK**.

### To restore a list or library item

1. Go to the site that the list or library item was deleted from.
2. On the **Quick Launch**, select **Recycle Bin** to display the site Recycle Bin page.
3. Select the list item or document by selecting the check boxes at their left. You can select multiple list items and documents.



*The Recycle Bin selection*

4. At the top of the deleted items list, select **Restore Selection** to restore the selected items.
5. Select **OK** to confirm.



**TIP** After you've restored the selection from the Recycle Bin, you might want to navigate to the original list or library to confirm that the list item or document has been restored to its original location.

## Stay up to date with content changes

In SharePoint 2016, you can stay up to date with content changes by using features such as the following:

- You can set up alerts to receive notifications via email or SMS when changes are made to the content of a site.
- You can follow documents to track updates to those documents in your newsfeed.



## Set up alerts

SharePoint 2016 includes a handy feature that sends an email notification or text message whenever changes are made to content in a site, including changes made to list items in a list. The setup for this notification is called an alert. You can set up an alert for a list, library, folder, file, or list item. No alerts are set up automatically, so you must subscribe to the alerts that you want. Alerts can be set up for different types of changes so that you can learn about the changes you are most interested in.

Alerts are quite easy to set up. Every list and library in a SharePoint 2016 site has an Alert Me button in the Share & Track group on the ribbon. You use the button on the List tab of the ribbon to subscribe to an alert on a list level, and the one on the Library tab to subscribe to an alert on a library level. To subscribe to an alert for an item or file, you select the item in a list or the file in a library, and then select the Alert Me button on the Items or Files tab, respectively.



**TIP** For email alerts to be available, the SharePoint central administrator must configure the outgoing email settings for your server. Similarly, for text alerts to be available, the SharePoint Farm administrator must configure the SMS/MMS service settings. Both settings can be configured in SharePoint Central Administration. If these settings are not configured, the Alert Me button on the ribbon and the Alert Me option in the callout menu will not be available.

Alerts specify to whom the alert will be sent and the kind of changes and frequency for which the alert will be sent. By default, the alert is sent to the email address of the user who sets up the alert. If no email address has been established for the authenticated user, an email prompt is generated in the Send Alerts To area. After it has been provided, the address will be remembered for subsequent subscriptions.

When you set up an alert, you choose the type of change for which the alert should be initiated. For example, list-level alerts have subscriptions for All Changes To Any List Item, New Items Are Added Only, Existing Items Are Modified Only, or Items Are Deleted Only. If you want to see added and changed items but not deleted items, you need to set up two alerts. List item-level alerts, however, are only sent when the item changes, because you can only set up this alert after the list item already exists, and a deletion is considered a change to the list item.

You must specify when to send alerts; the default is when anything changes. Different lists and libraries have different options available. For example, a document library provides the following change alert options for a document:

- Anything Changes
- Someone Else Changes A Document
- Someone Else Changes A Document Created By Me
- Someone Else Changes A Document Last Modified By Me

You must also specify the alert frequency. There are three choices for any type of alert.

- Send Notification Immediately
- Send A Daily Summary
- Send A Weekly Summary

Choosing to receive an alert immediately actually queues the notice to be sent as soon as the next job runs after the alert is triggered. By default, the alert job runs every 5 minutes but could be configured by your administrator to wait as long as 59 minutes. The daily and weekly summaries store all changes made to the list or list item and send a summary at the end of the period. By default, daily summary alerts are generated at midnight each night, and weekly summary alerts are generated at midnight every Sunday night.

### To set up an alert for a list item or a document

1. Go to a list or a library that contains an item that you want to set up an alert for.
2. Select the item or document for which you want to set up an alert.
3. Do one of the following to open the New Alert dialog box:
  - For a list item, do either of the following:
    - On the **Items** tab of the ribbon, in the **Manage** group, select **Alert Me**, and then select **Set alert on this item**.
    - Select the ellipsis to the left of the item's name, in the callout that opens, select the ellipsis again, select **Advanced**, and then select **Alert me**.

- For a document, on the **Files** tab, in the **Share & Track** group, select **Alert Me**, and then select **Set alert on this document**.

Documents: Document(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.

Send Alerts To  
You can enter user names or e-mail addresses. Separate them with semicolons.

Delivery Method  
Specify how you want the alerts delivered.

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.

When to Send Alerts  
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

Users:  
Olga Londer

Send me alerts by:  
 E-mail  
 Text Message (SMS)  
 Send URL in text message (SMS)

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

Send notification immediately  
 Send notification immediately  
 Send a daily summary  
 Send a weekly summary

Time:  
Monday 11:00 AM

OK Cancel

*Setting up an alert on a document*

4. In the **New Alert** dialog, provide the alert title, who the alerts should be sent to, and the delivery method. Select the criteria for the new alert and the alert frequency, and select **OK**.

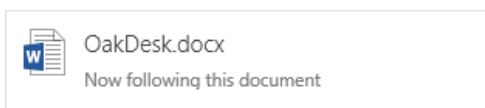
## Follow documents

In SharePoint 2016, you can follow documents to track updates to them in your newsfeed. Following a document is different from receiving alerts about the changes to the document; setting an alert for the document keeps you notified of specific changes at the predefined frequency, via an email or SMS, whereas following a document adds a link to this document in your newsfeed and provides notifications of all document changes via your newsfeed. In addition, people who are following you will get a newsfeed notification that you're following this document, if they have appropriate permissions to access it. All documents that you follow are shown in one place in your newsfeed, in the list of followed documents.

### To follow a document

1. Go to a library that contains the document you want to follow.
2. Do one of the following:
  - Display the shortcut menu for the document, select **Advanced**, and then select **Follow**.
  - Select the ellipsis to the left of the document's name, and in the callout that opens, select **Follow**.

Notice the confirmation that is displayed for a short time in the upper-right corner of the page.



*Confirmation that you are following the document*



**TIP** After you've set up document following, you might want to navigate to your newsfeed to confirm that the document has been added to the list of documents that you are following.

## Work offline

If you are a mobile device user, you know that it's not always possible or convenient to connect to SharePoint every time you want to read or modify a document. In SharePoint 2016, you can work with your documents offline. You can synchronize, or sync, a SharePoint library to your device. This process creates a copy of the library on your device in the SharePoint folder, under the name that combines the name of the source SharePoint site with the name of the source library, with a hyphen in between—for example, *Team Site-Documents*. You can modify the location to one of your choosing. You can then work with files in the library by using File Explorer. When working offline, you can view and modify the content in the same way you can when working in SharePoint. Updates to the files synchronize back to SharePoint when you are back online. For example, if you create a new document in a library folder on your device, it will be synced back into the source library when you are online.



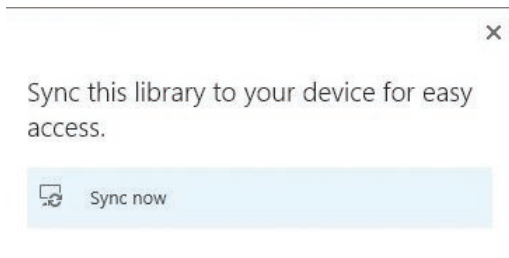
**TIP** There are limits on the number and size of files you can sync. You can sync up to 5,000 items in a library, including folders and files. You can download files up to 10 GB.



**IMPORTANT** To use sync, you must have Office 2016 or Office 2013 installed on your device or have an Office 365 subscription that includes Office programs.

### To sync a library to your device

1. In SharePoint, go to a library that you want to sync to your device.
2. In the body of the page, above the list of documents, select **Sync**.
3. Confirm that you want to sync the library by selecting **Sync now** in the confirmation dialog.



*Sync confirmation*

4. If the browser security dialog box appears, select **Allow**.
5. In the message box that appears, select **Sync Now** to confirm the root location and start the sync.
6. A message appears confirming that the sync has started. The full path to the location is shown, including the root, the SharePoint folder, and the subfolder that is named after the site and the library, with a hyphen in between; for example, *C:\Sharepoint\Team Site-Documents*.

If you want to see the files as they come in, select **Show my files**.

## Skills review

In this chapter, you learned how to:

- Discover lists and libraries in a site
- Create and populate lists
- Create and populate libraries
- Check files out and work with versions
- Organize lists and libraries
- Delete and restore list items and documents
- Stay up to date with content changes
- Work offline



## Practice tasks

The practice files for these tasks are located in the SP2016SBS\Ch03 folder.



**IMPORTANT** You must have sufficient permissions to perform the operations involved in each practice task to complete that practice task. For more information, see Appendix A, “SharePoint 2016 user permissions and permission levels.”

### Discover lists and libraries in a site

Go to your SharePoint site and sign in if prompted. Then perform the following tasks:

1. Go to the **Your Apps** page.
2. Using Search, filter the page to display only the list apps available on your site.
3. Using Search, filter the page to display only the library apps available on your site.

### Create and populate lists

Continuing on your SharePoint site, perform the following tasks:

1. From the **Your Apps** page, create a Tasks list and name it **BuyerTasks**.
2. Change the display name of the **BuyerTasks** list to **Common Buyer Tasks**.
3. Go to the **Common Buyer Tasks** default list view page, and confirm the following:
  - The page title shows the modified list name.
  - The browser’s address bar reflects the original list name.
4. In the **Common Buyer Tasks** list, create a task named **Create vendor SharePoint list**.
5. Switch to the Quick Edit view of the list, and add the following tasks:

Task name	Due date
Ensure vendor access	Any date of your choosing
Identify products to purchase	Any date of your choosing
Generate purchase order	A date after the previous date
Notify Receiving about purchase	A date after the previous date

6. Return to the default list view page of the **Common Buyer Tasks** list.

7. Edit the **Create vendor SharePoint list** task to mark it as complete. Confirm that the completed task is now checked and crossed out.
8. Add the **WideWorldPurchaseOrder** document from the practice file folder to the **Generate purchase order** task, and then return to the default list view page.
9. To confirm that the document has been successfully attached, display the **Generate purchase order** list item's page. Verify that **WideWorldPurchaseOrder.docx** is shown in the **Attachments** field at the bottom of the list item page, and then return to the list.

## Create and populate libraries

Continuing on your SharePoint site, perform the following tasks:

1. Create a library named **Furniture**.
2. Go to the **Furniture** library and do the following to upload documents from the practice file folder to the library:
  - From your browser, launch the **Add a Document** dialog and upload the **OakDesk** document from the practice file folder to the library.
  - Drag the **OakChest** document from the practice file folder to the library page in your browser.
  - Copy the **OakNightStand** and **OakEndTable** documents from the practice folder and paste them into the Explorer View of the library.
3. Refresh the library page in your browser and verify that the library contains the uploaded documents.
4. From within the library, create a new Word document, either in the Word client program or in Word Online. Enter the text **Oak Mirror** in the document, and then save the document back to the library with the name **OakMirror**.
5. Refresh the page and verify that the library contains the new document.
6. Open the **OakMirror** document for editing. Format the document text as bold and centered, and then save the document back to the library.
7. Refresh the library page in the browser and verify that the changes to the **OakMirror** document were saved by checking its timestamp.
8. Close the program you used to edit the **OakMirror** document if it's still open, either the Word client program or Word Online.



## Check files out and work with versions

Continuing on your SharePoint site, perform the following tasks:

1. Go to the **Furniture** library.
2. Check out the **OakChest** document. Verify that the file icon indicates that the document has been checked out.
3. Check in the **OakChest** document, entering the comment **This is the final version of the document** in the **Check in** dialog box. Verify that the file icon indicates that the document is no longer checked out.
4. Display the **Version History** dialog for the **OakChest** document.



**TIP** If the Version History option is unavailable, versioning is disabled for this document library. To enable versioning, on the Library tab of the ribbon, select Library Settings, and then on the Settings page, under General Settings, select Versioning Settings. On the Versioning Settings page, in the Document Version History section, select Create Major Versions, and then select OK. To continue with this set of tasks, go back to the Furniture library, check out the OakChest document, and then check it in to create a second version.

5. In the **Version History** dialog, review the versions saved for the **OakChest** document.
6. Restore the first version of the document, and then return to the library.

## Organize lists and libraries

Continuing on your SharePoint site, perform the following tasks:

1. Go to the **Furniture** library.
2. In the library, create a folder named **In Progress**.
3. Modify the default list view of the **Furniture** library as follows:
  - Remove the **Modified By** column.
  - Display the **Version** column.
4. Save your changes and return to the library page. Confirm that the library columns are displayed as expected.
5. Sort the **Furniture** library documents in ascending alphabetical order by **Name**, and then reverse the sort order.
6. Go to the **Common Buyer Tasks** list, and switch to the Quick Edit view.
7. To the right of the existing columns, add a column of the type **Number**.
8. Rename the **Number** column to **Sequence**.

9. In the **Sequence** column, enter the following numbers to identify the preferred order of tasks in the list:

Title	Sequence
Create SharePoint list	2
Ensure vendor access	3
Identify products to purchase	1
Generate purchase order	5
Notify Receiving about purchase	4

10. Modify the default list view of the **Common Buyer Tasks** list as follows:
- Hide the **Assigned To** and **Due Date** columns.
  - Display the **%Complete** column.
  - Change the position of the **Priority** column to **3** so that it appears immediately to the left of the **Task Name** column in the list view page.
11. Save your changes and return to the list page. Confirm that the list columns are displayed as expected.
12. Sort the **Common Buyer Tasks** list in ascending numerical order by **Sequence**, and then reverse the sort order.
13. Switch to the Quick Edit view of the list. Change the **Priority** of the **Ensure Vendor Access** and **Generate Purchase Order** list items to **(1) High**, and then return to the default list view.

✓	<input checked="" type="checkbox"/>	Task Name	...	Priority
	<input type="checkbox"/>	Create vendor SharePoint list	...	(2) Normal
	<input checked="" type="checkbox"/>	Ensure vendor access	...	(1) High
	<input type="checkbox"/>	Identify products to purchase	...	(1) High
	<input type="checkbox"/>	Generate purchase order	...	(2) Normal
	<input type="checkbox"/>	Notify Receiving about purchase	...	(3) Low
	<input type="checkbox"/>	Notify Receiving about purchase	...	(2) Normal

*Changing priority of tasks*

14. In the default list view, filter the list to display only the items that have a **Priority** of **(1) High**. Then remove the filter from the **Priority** column to display a full list.

## Delete and restore list items and documents

Continuing on your SharePoint site, perform the following tasks:

1. Go to the **Common Buyer Tasks** list if it is not already open.
2. Delete the **Create Vendor SharePoint list** item.
3. Go to the **Furniture** library.

4. Delete the **OakChest** document.
5. Go to the site **Recycle Bin** and restore the **Create vendor SharePoint list item** and the **OakChest** document.
6. Go to the **Common Buyer Tasks** list and verify that the list item has been restored.
7. Go to the **Furniture** library and verify that the **OakChest** document has been restored.

## Stay up to date with content changes

Continuing on your SharePoint site, perform the following tasks:

1. Go to the **Common Buyer Tasks** list.
2. Set an alert on the **Generate purchase orders** task. Accept the default options.
3. Switch to the Quick Edit view of the list.
4. Change the **Priority** for the **Generate purchase orders** task to **(2) Normal**, and then switch back to the default list view.
5. Open your email program, and confirm that you have received an email alert notifying you of a change in priority in this list item.
6. Go to the **Furniture** library.
7. Select the **Follow** option for the **OakDesk** document.
8. On the top left of the page, select your **Newsfeed** page and verify that the **OakDesk** document is listed under **Docs I'm following**.

## Work offline

Continuing on your SharePoint site, perform the following tasks:

1. Go to the **Furniture** library.
2. Start the library sync to your local device.
3. In File Explorer on your local device, go to the **C:\SharePoint \Team Site-Furniture** folder to confirm that the library has been synced.



**TIP** Depending on your connection and the data volume, there might be a small delay before all the files are synced to your device and appear in the SharePoint folder.

# Work with webpages

## 7

In previous chapters, you learned how to organize your content into site collections, sites, lists, and libraries; however, Microsoft SharePoint sites are similar to other websites in that they can contain multiple webpages. In fact, you could think of storing information in a file, such as a Microsoft Word document or a Microsoft Excel worksheet, as hiding that information. Before a user can see the information in such files, the file has to be downloaded to the user's computer, and then a separate program or app has to be opened to display the contents of the file. With a webpage, your browser displays the information immediately when you select the link to the page. Therefore, it is just as important to place content on pages as it is to use lists and libraries.

This chapter guides you through procedures related to creating pages, adding content to pages, managing pages, and using app parts and web parts.

## In this chapter

- Understand SharePoint pages
- Create pages
- Add content to pages
- Manage pages
- Use app parts and web parts

## Practice files

For this chapter, use the practice files from the SP2016SBS\Ch07 folder. For practice file download instructions, see the introduction.

## Understand SharePoint pages

SharePoint Server includes four types of webpages. The ones you see and can create for a site depend on the site template used to create the site. These are:

- Wiki pages
- Web part pages
- Publishing pages
- Application pages

On team sites and community sites, the two types of pages you will work with are wiki pages and web part pages. Publishing pages are available on sites you create by using one of the publishing site templates, such as the Publishing Portal, Enterprise Wiki, Product Catalog, Publishing Site, Publishing Site with Workflow, or Enterprise Search Center site templates.

You can customize the first three types of pages by using the following tools:

- Your browser
- A SharePoint-compatible webpage-editing tool, such as Microsoft SharePoint Designer 2013
- A professional development tool, such as Microsoft Visual Studio

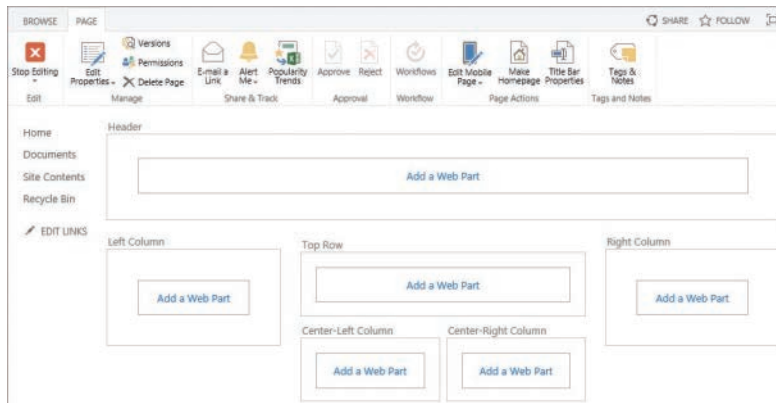
No one tool can do everything; therefore, it is likely that when you use SharePoint, either in an on-premises installation of SharePoint Server or SharePoint Online, your organization will use all three tools at some point.

### Web part pages

Web part pages consist of web part zones that can contain app parts and web parts. Multiple web parts can be added to each zone. After a web part is added to a zone, you can alter the location of the web part within the zone, and you can move the web part from one zone to another. The web part zones are visible only when you are editing a page.



**TIP** Some zones allow web parts to be stacked in a horizontal direction, whereas others stack them in a vertical direction. The illustration in the Layout section of the New Web Part Page page displays the selected Layout template. If you do not add a web part to a zone, the zone collapses (unless it has a fixed width), and the other zones expand to fill the unused space when you go to the web part page. Therefore, if you currently believe you only need two zones, displayed as two columns, a good choice would be the Header, Footer, 4 Columns, Top Row layout template, because this layout allows for other layout combinations if you need them in the future.



When you create a web part page, you can choose the layout of the zones.



**IMPORTANT** You cannot change the zone layout after you create the web part page.

Web parts are reusable components that can contain any type of web-based information, including analytical, collaborative, and database information. App parts are used in conjunction with apps you add to your site from your organization's app store or from the online SharePoint Store.



**TIP** To include free-format static text or images on a web part page, you must use the Content Editor web part (CEWP) or the Image Viewer web part.

App parts can also be used to display content from lists and libraries, so the content dynamically changes as you upload, modify, and delete list items in the lists or files in the libraries. These app parts are used on the web part pages that are created when you create views in your lists and libraries.



**TIP** Web part pages can be configured to send data from one web part or app part to another by using a mechanism called a web part connection. This allows you to create interactive pages.

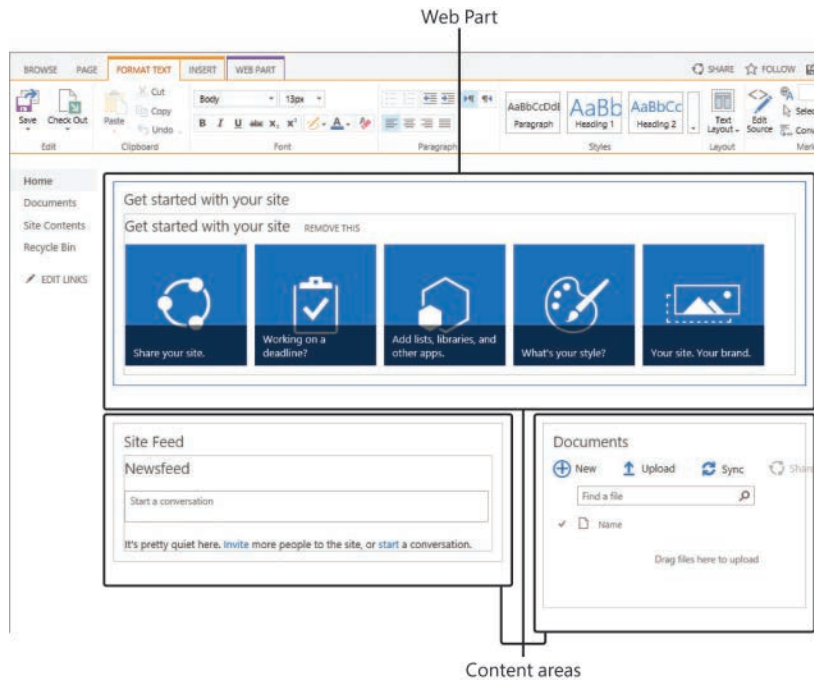
There are a couple of disadvantages of using web part pages: many users find the mechanism of changing such pages not intuitive, and after you create a web part page with a specific layout of web part zones, you cannot change the layout.

Web part pages are the default pages on sites that are created from the Project, Document Center, Record Center, Community Portal, and Compliance Policy Center site templates. On these sites, you need the Add And Customize Pages permission to edit the default web part page. If you do want to create multiple pages on these sites, you can create a wiki page library where you can create wiki and web part pages.

## Wiki pages

Wiki pages are easy to use and their layout is easy to change. When you edit the home page of a team site, you'll see that it consists of three content areas, each containing a web part or an app part:

- **Get Started With Your Site** This web part displays five tiles that you can select to quickly complete common SharePoint actions. As you point to each tile, a description of the task is displayed. You can remove this web part by selecting Remove This.
- **Site Feed** This web part displays a newsfeed on your site; its use is also known as *microblogging*. These microblogging conversations are stored in the MicroFeed list.
- **Documents** This app part displays the contents of the Documents library.



*In the content areas, you can add static text, app parts, and web parts*

When you create a team site or community site, SharePoint creates a wiki page library named Site Pages, where webpages are stored and where new pages can be created. The Site Pages wiki library inherits its permissions from the site. Therefore, anyone who is mapped to the Edit permission level at the site level—that is, anyone who is a member of the site's Members SharePoint group—is allowed to change any page or create new pages in the Site Pages library. This is known as open editing. Any member of the site can edit it as he or she wants if, for example, the member thinks the page is incomplete or poorly organized. Therefore, as users share their information, knowledge, experience, ideas, and views, the content evolves. Site members can work together to change or update information without needing to send emails or attend meetings or conference calls. All users are allowed to control and check the content, because open editing relies on the assumption that most members of a collaboration site have good intentions.

Wiki pages can also contain app parts and web parts. Although you cannot use web part connections on wiki pages, the ease with which you can mix free-format static text and images on wiki pages in addition to web parts and app parts make them a popular page choice on team sites.





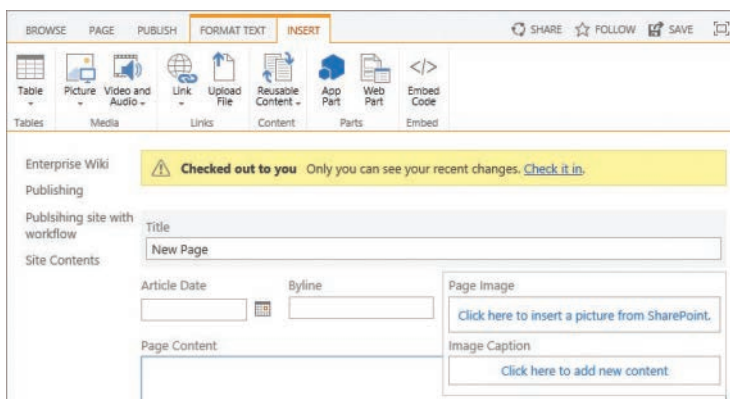
**TIP** Wiki page libraries can be created on any site where the Team Collaboration Lists site feature has been activated. There is a second type of wiki page that you can create when you create a site collection based on the Enterprise Wiki site template. This wiki page is a type of publishing page. For more information about Enterprise Wiki sites, see Chapter 9, “Work with wikis, blogs, and community sites.”

## Publishing pages

For Internet sites and company portals, when the content on a page is to be viewed by a large number of people, pages might need to go through a formal approval process before users can view them. In such cases, publishing sites and publishing pages are a better choice than team sites and wiki pages. Most visitors to a publishing site want to consume information displayed on the page. They will not be allowed to edit the pages. Only a few users will be able to create, edit, and delete publishing pages.

Publishing pages, also known as Web Content Management (WCM) pages, are stored in the Pages library and are created from publishing templates known as page layouts. After you create a publishing page, you can change the layout of the page by choosing a different layout.

Publishing pages can have both content areas and web part zones. Content areas on a publishing page can be similar to the content areas that you use on a wiki page in that they can contain text, images, app parts, and web parts. However, some content areas can be very restrictive—for example, they might allow you to insert only an image or plain text. The name of the content area usually indicates the type of content you can add. The content area names and the web part zone names are displayed only when you are editing the page. The layout and the type of content you can add to the content areas is dependent on the layout chosen for the publishing page.



*Content areas with a grey background are displayed only when you edit the page*

## Application pages

Application pages, also known as system pages, look very similar no matter which site you go to. Examples of such pages are the List Settings page and the Site Settings page. These pages contain *\_layouts* in their URLs, as in *intranet.wideworldimporters.com/\_layouts/15/viewlsts.aspx*, which is the web address for the Site Content page on the Wide World Importers intranet site.



**TIP** Application pages cannot be created, modified, or managed by using your browser or SharePoint Designer, so they are not covered in the following topics.

## Create pages

The first page displayed on a SharePoint site is known as the home page. This is the page on which all site visitors start. In your organization, the home page might be known as the default page, the welcome page, or the landing page. Home pages tend to aggregate information from elsewhere and direct users to other pages. For instance, in the Quick Launch for a home page, when you select Documents, you are taken to the default view of the Documents library.

There are many reasons why adding content to just the home page is not enough. Although you can add a vast amount of content on one page, this can result in the page taking a long time to render, and it can be difficult for users to find content if they have to scroll down the page many times. Try to compose your content into multiple pages, each with no more than two or three screens of information; and never add content to a page so that users have to scroll to the right to see the content. Link your pages together so that users can navigate easily between them in an organized manner.

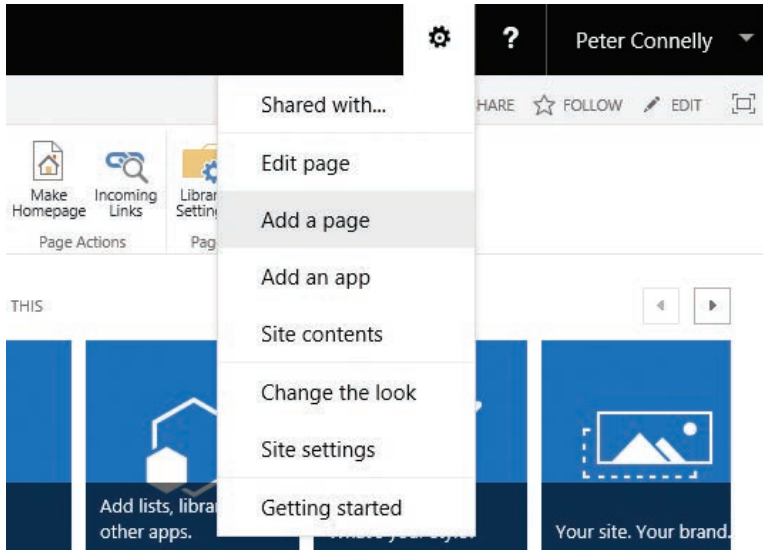
There are several methods for creating a new page; however, the recommended method for creating pages that contain content that relates to content on existing pages is to create a forward link, also known as a *wiki link*, by entering the name of the page within two sets of double square brackets. This is quicker and easier than using the Links command on the Insert tab.



**TIP** If you want to enter double open or closed square brackets in the content of a page without making a link, enter a backslash before the two brackets, as in `\\[` or `\\]`.

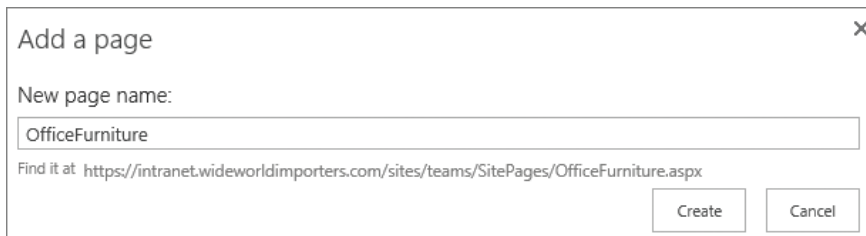
### To create a wiki page

1. Go to the team site where you want to create a new wiki page, and then, on the **Settings** menu, select **Add a page**.




*Use the Setting menu to create or edit pages*

2. In the **Add a page** dialog, enter the name of your new page.



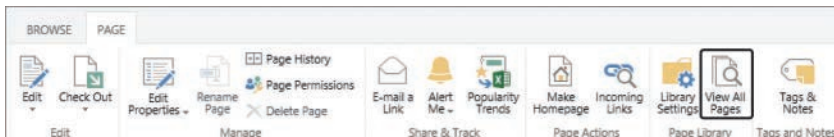
*Enter the name of your page*

 **TIP** The name of the page will appear at the top of the page and is also used to create the web address (URL) of the page.

3. Select **Create**.

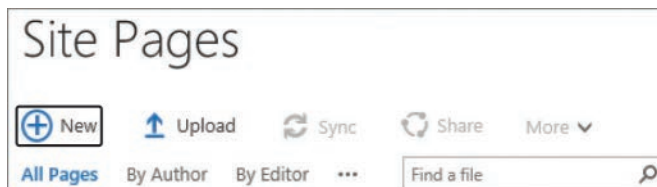
*Or*

1. On the home page of your team site or community site, go to the **Page** tab and then, in the **Page Library** group, select **View All Pages** to display the default view of the Site Pages library.



*Use the Page tab to manage pages*

2. Do one of the following to display the New Item page:
  - Below the title for the Site Pages library, select **New**.



*Use the New command below the title of the Site Pages library to create a new page*

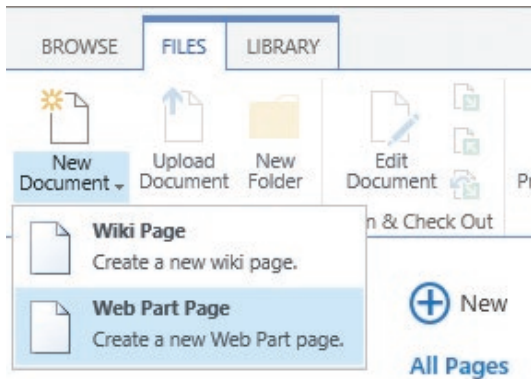
- On the **Files** tab, select **New Document**.
3. Enter the name of the page, and then select **Create**.

 A screenshot of the 'New Item' page. The title 'New Item' is at the top. Below it is the 'New page name:' label and a text input field containing 'GardenFurniture'. Below the input field is the URL 'Find it at https://intranet.wideworldimporters.com/sites/teams/SitePages/GardenFurniture.aspx'. At the bottom right are 'Create' and 'Cancel' buttons.

*On the New Item page, enter the name of the new page*

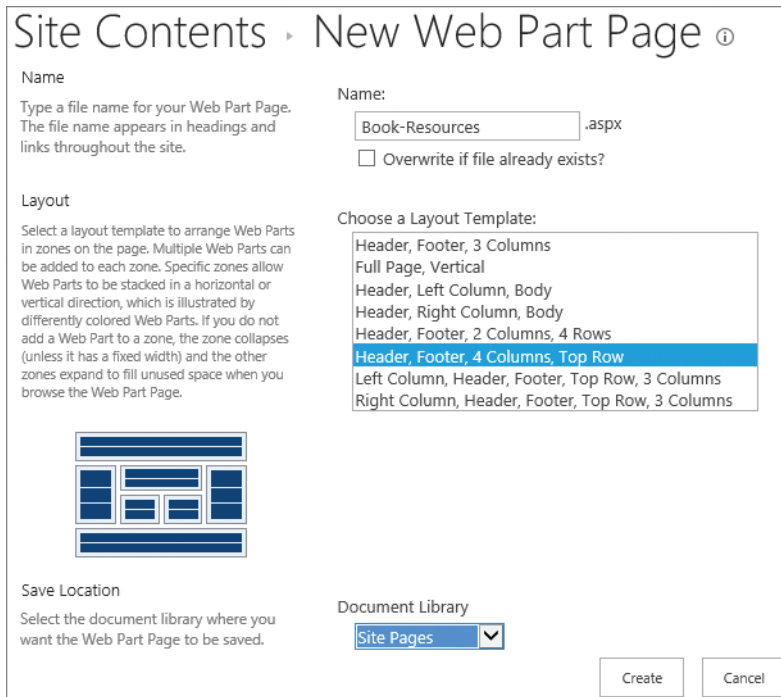
### To create a web part page

1. On the home page of your team site or community site, go to the **Page** tab and then, in the **Page Library** group, select **View All Pages** to display the default view of the Site Pages library.
2. On the **Files** tab, select the **New Document** arrow (not the button), and then select **Web Part Page**.



Use the New Document menu to create either a wiki page or a web part page

3. On the **New Web Part Page** page, in the **Name** box, enter the name of your page, and then in the **Layout** section, select the layout template that has the web part zone arrangement you want.



Use the New Web Part Page page to choose a name and zone layout for your webpage

4. In the **Save Location** section, in the **Document Library** list, select **Site Pages**.



**TIP** Although you can save web part pages in any library, if you want to create wiki links from your wiki pages to a web part page, your web part page must be stored in the Site Pages library.

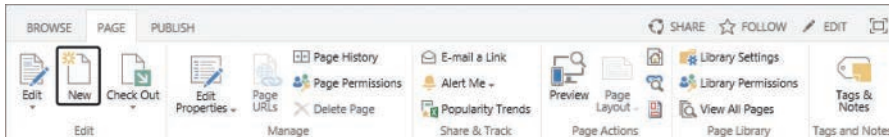
5. Select **Create**.

### To create a publishing page

1. Go to the publishing site where you want to create the publishing page and then, on the **Settings** menu, select **Add a page**.
2. In the **Add a page** dialog, enter the name of your new page, and then select **Create**.

Or

1. Go to the home page of your publishing site.
2. If no tabs are displayed, on the **Settings** menu, select **Show Ribbon**.
3. Go to the **Page** tab, and then, in the **Edit** group, select **New**.



Use the **Page** tab to create, edit, and manage your page

4. In the **Add a page** dialog, enter the name of your new page, and then select **Create**.

Or

1. Go to the home page of your publishing site.
2. Go to the **Page** tab, and then, in the **Page Library** group, select **View All Pages** to display the default view of the Pages library.
3. On the **Files** tab, select **New Document** to display the Create Page page.
4. In the **Title** box, enter the name of the new page that you want to display to users.
5. In the **Description** box, enter the purpose of the page, including any search keywords that people can use to find the page.

6. Select the **URL Name** box. The name you entered in the Title box appears, with spaces replaced with hyphens.
7. In the **Page Layout** section, select the layout you want to use to control how the content on the page will be displayed.

**Create Page**

**Page Title and Description**  
Enter a URL name, title, and description for this page.

Title:

Description:

URL Name:

**Page Layout**  
Select a page layout to control how the page will be displayed.

(Article Page) Image on left  
(Article Page) Image on right  
(Article Page) Summary links  
(Catalog-Item Reuse) Blank Catalog Item  
(Catalog-Item Reuse) Catalog Item Image on Left  
(Enterprise Wiki Page) Basic Page  
(Error Page) Error  
(Project Page) Basic Project Page  
(Redirect Page) Redirect

Use the *Create Page* page to enter a URL name, title, description, and page layout for the page

8. Select **Check Spelling**.
9. Correct any spelling mistakes, and then select **OK** to close the Spell Checker dialog.
10. Select **Create**.

**To create a wiki page or publishing page that is displayed by selecting a forward link**

1. On the page where you want to add the forward link, activate edit mode.
2. Position the cursor where you want to add the link to the page you will create.
3. Enter ***[[name of page|words that you want to display on the page for the link]].*** An example is ***[[BedroomFurniture|exotic bedroom furniture]].***

Wide World Importers import unique furniture, includng [\[\[BedroomFurniture|exotic bedroom furniture\]\]](#)

*Creating a forward link to a page*



**TIP** As you enter the name for the new page, a list of existing pages is displayed. You could select a name from this list to create a forward link to a page you previously created.

4. Save the page. The forward link is indicated by a dotted underline.

Wide World Importers import unique furniture, including [exotic bedroom furniture](#)

*A forward link to a page that has not been created is denoted by a dotted underline*

5. Select the underlined text to open the Add A Page dialog.

*Creating a page from the Add A Page dialog*

6. Select **Create**.

## Add content to pages

After a page has been created, you can add content, such as text, tables, images, and links to other pages or websites. When you have finished entering your content, save the page. You can re-edit any page at a later time as necessary.



**TIP** The only way to add content to web part pages is by adding app parts or web parts. This is covered in the "Use app parts and web parts" topic later in this chapter.

## Modify pages

To prevent two people from editing a page at the same time, anyone intending to modify content should always check out the page before he or she begins. When you edit a publishing page, the page is automatically checked out to you. You must check out wiki pages and web part pages yourself.





**TIP** When another member of your team has checked out a page, the Check Out command on the Page tab is inactive, and a yellow notification area is displayed at the top of the page, stating who the page is checked out to.

The Pages library, where publishing pages are stored, is configured for major and minor (draft) versions. Only users who can edit items can see the draft items; therefore, after you have checked in a page, the page must be published as a major version before visitors to the site can see the amendments you have made to the page.



**SEE ALSO** For more information about checking in, checking out, and versioning, see Chapter 3, “Work with content in lists and libraries.”

As you modify a page, you might find that the layout you originally chose does not now suit the content you want to display. On both wiki pages and publishing pages, you can change the page layout.

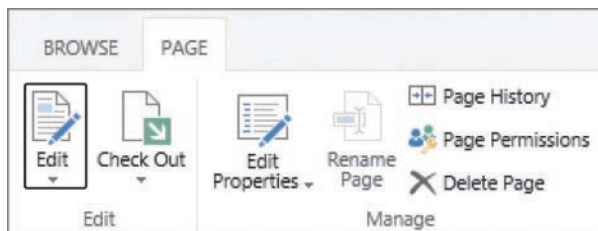
### To activate a wiki or publishing page for editing

1. Go to the page that you want to edit, and then do one of the following:
  - On the **Settings** menu, select **Edit page**.
  - In the upper-right corner of the page, select **Edit**.



Use the links in the upper-right corner to share a site, follow a site, edit a page, or focus on content

- On the **Page** tab, select **Edit**.



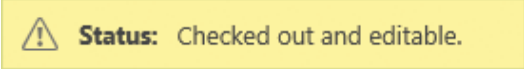
Use the Page tab to edit and check out a page



**TIP** On publishing pages, if the Page tab is not displayed, on the Settings menu, select Show Ribbon.

## To check out a wiki page

1. On the wiki page, on the **Page** tab, select **Check Out**. A yellow notification area is displayed at the top of the page, stating that the page is checked out and editable.



**Status:** Checked out and editable.

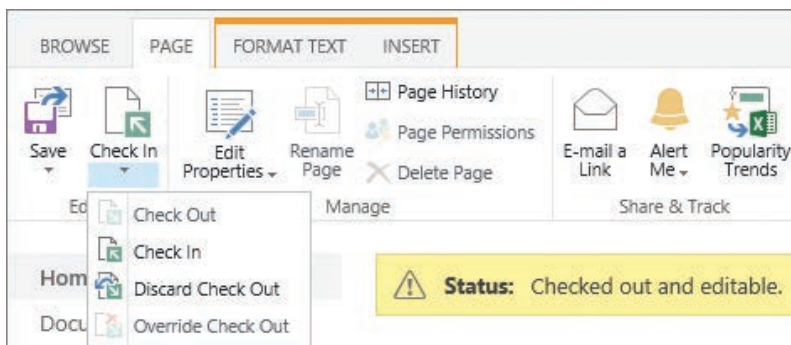
The yellow notification area at the top of a page is used to display the page status



**TIP** If you are already editing a wiki page, you can also select Check Out on the Format Text tab.

## To check in a wiki page

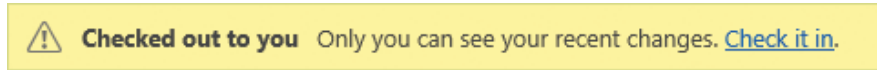
1. On the wiki page, on either the **Page** tab or the **Format Text** tab, do one of the following:
  - If you have the page checked out, to check in your changes, select **Check In**.
  - If you have the page checked out, to discard any changes you have made to your checked out version and release the checkout, select the **Check In** arrow, and then select **Discard Check Out**.
  - If the page is currently checked out to another user and you have the Override List Behaviors permission, which allows you to check in the page and discard any changes that user might have made to the checked-out version, select **Override Check Out**.



Use the Check In menu to check out, check in, discard a checkout, or override a checkout

### To check in and publish a publishing page

1. On the publishing page, do one of the following:
  - In the yellow notification message, select **Check it in**.

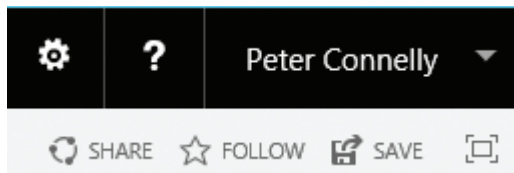


*The yellow notification area displays the status of the page and allows you to check in the page*

- Use one of the options described in the previous procedure, "To check in a wiki page."
2. In the **Check In** dialog, enter a comment, and then select **Continue**.
3. Do one of the following:
  - In the yellow notification message, select **Publish this draft**.
  - On the **Publish** tab, select **Publish**.

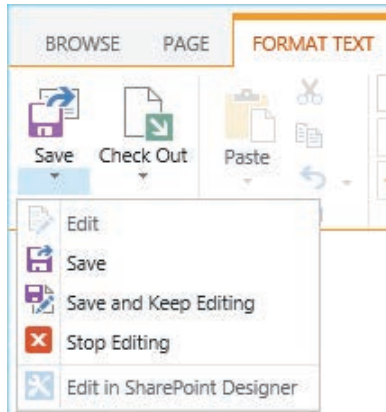
### To save or discard your modifications to a wiki or publishing page

1. After you have added content to a page, do one of the following:
  - To the right of the tabs, select **Save**.



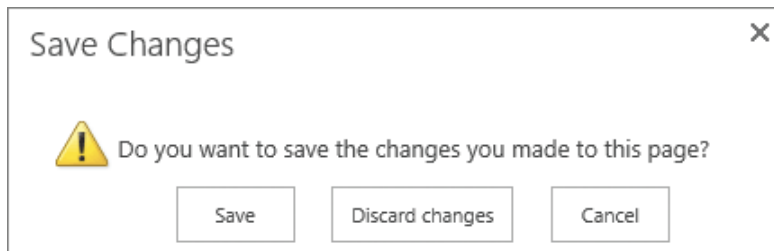
*When you edit a page, the upper-right Edit link is replaced with Save*

- If you are done adding content to the page, on the **Page** tab or the **Format Text** tab, select **Save**.
  - If you want to save the content you have added so far but intend to continue adding content to the page, on the **Page** tab or the **Format Text** tab, select the **Save** arrow and then select **Save and Keep Editing**.



Use the **Save** split button to save, keep editing, or discard your modifications

- On the **Page** tab or the **Format Text** tab, select the **Save** arrow, and then select **Stop Editing**. You will then be prompted to save or discard the content you have added to the page. To discard your modification, select **Discard changes**.



Use the **Save Changes** dialog to save or discard the changes you have made to a page, or select **Cancel** to return to editing the page

## Format and display content

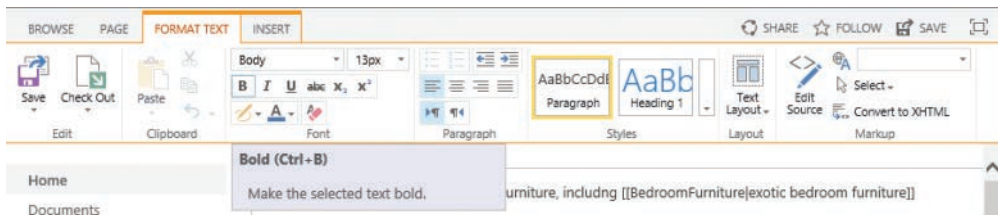
SharePoint provides you with a What You See Is What You Get (WYSIWYG) environment for adding content to your pages. When a wiki page or publishing page is in edit mode and the cursor is within the body of the page, two tabs are displayed: **Format Text** and **Insert**.



**TIP** The **Format Text** and **Insert** tabs also appear when you enter content by using the **Content Editor** web part on a web part page.

The commands on these tabs are similar to the commands on the Home and Insert tabs in Word: you use them to format the text, check spelling, and control the layout of the page, and to insert tables, images, videos, audio, hyperlinks, app parts, web parts, and embedded code.

You can also use keyboard shortcuts similar to those in other Office programs. If a tab command has a keyboard shortcut, you can display it by pointing to the command on the tab to display the screen tip.

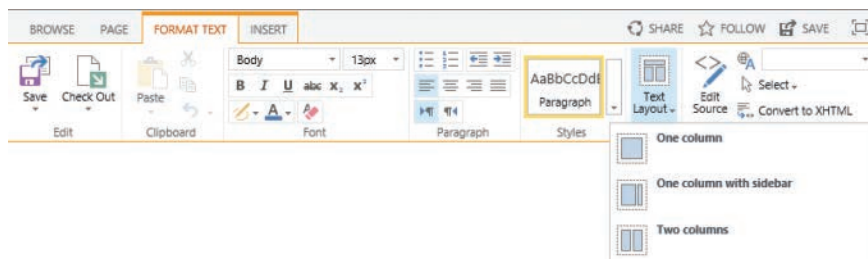


Screen tips can include the command name, keyboard shortcut, and a description

### The Format Text tab

The Format Text tab contains ribbon groups you will not find on the Home tab in Word. These include:

- **Layout** This group appears on the Format Text tab only for wiki pages. Use the Text Layout command to create additional editing areas and to change the structure of your page. You can reformat the page by using any of eight options. For publishing pages, the Layout group is on the Page tab. Developers can create additional publishing page layouts, but no additional wiki page layouts can be added to SharePoint.



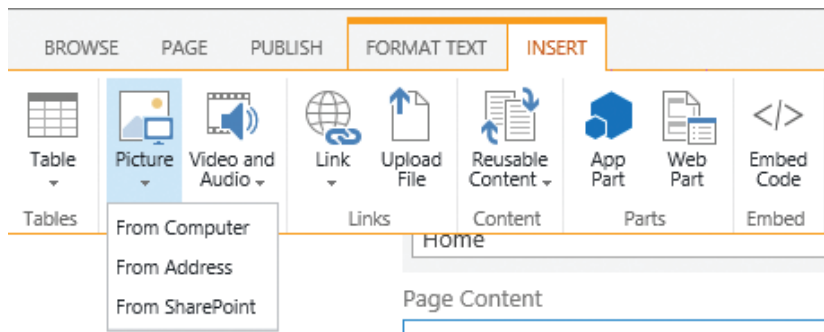
You can control the layout of a wiki page

- **Markup** This group provides four commands:
  - **Edit Source** Selecting this command opens a dialog that contains a plain-text box in which you can enter HTML code. The text box displays the HTML tags for the content area where the cursor was located before you selected Edit Source. For example, if your wiki page has a two-column layout and the cursor is in the left column when you select the command, only the HTML for the left column is displayed in the dialog. You will need to know HTML to use this method of entering content on your page, because no IntelliSense help is provided; therefore, you might find it easier to use an HTML editing tool to create the content, and then paste it into the text box. To prevent the entry of malicious code, SharePoint does sanitize user-entered HTML content, so you might find that some of the code you enter is removed when you save the page.
  - **Languages** When you create a SharePoint site, it has a default language. When you enter text in a different language, you can select the text and use this command to tag the language of the text. The SharePoint search functionality can then identify pages that include text in specific languages; some screen reader programs, such as the Job Access With Speech (JAWS) screen reader, use this so they can pronounce words correctly when they read them aloud.
  - **Select** Use this command to select the HTML tag you want to work with. For example, to edit the HTML for a row in a table, place the cursor in a cell in the row, and then select the Select command to display the list of HTML tags that apply to that row, including the row itself and any parent HTML tags, such as for the table or the entire content area. A red dotted line surrounds the area related to the HTML tag when you point to each tag in the Select list. To format or style the row, select the HTML for just the row.
  - **Convert to XHTML** Most SharePoint pages adhere to and generate HTML to the XHTML 1.0 Strict specification; however, when you use the Edit Source command to create HTML, you might introduce errors into the page. By using this command, you might be able to fix those errors.

## The Insert tab

The Insert tab also contains ribbon groups you will not find on the Insert tab in Word. These include:

- **Media** This group contains two split buttons:
  - **Picture** Use this command to insert a picture from your computer, to reference a web address where a picture is stored, or to reference an image that is stored in a SharePoint library.



Use the *Picture* split button to insert a picture on the page

Use the first option, *From Computer*, when you have stored your image on the hard drive of your computer—for example, drive C. The default location to store images that you use on pages is the Site Assets library; however, you can choose a different library on the site.



**TIP** The Site Assets library is the place to store files that are needed to brand a site, such as the image files used to display pictures on pages or files that contain team or company information. These are usually not files that team members will collaborate on, so they should be saved in the Site Assets library rather than in, for example, a document library.

Selecting the second option, *From Address*, opens the *Select Picture* dialog, in which you must manually enter or paste the URL of the image. To avoid incorrectly entering the URL for the image, which would result in a broken link, open another browser window or tab, navigate to the picture, copy the URL, and then paste the URL into the *Address* box in the *Select Picture* dialog.

Selecting the From SharePoint option opens the Select An Asset dialog, which you use to navigate to a SharePoint library where you have previously uploaded an image.

- **Video and Audio** Use this split button to display video and audio on your page. This command provides the same three options as the Picture split button, plus a fourth option, Embed. Using the Embed option is the same as using the Embed Code option in the Embed group on the Insert tab, which is described later in this section.
- **Content** This group appears on the Insert tab only on publishing pages and is detailed in the “Reusable content” section later in this topic.
- **Parts** This group contains two commands, App Part and Web Part. The insertion and configuration of these two components is detailed in “Use app parts and web parts” later in this chapter.
- **Embed** This group contains the Embed Code option, which you can use to embed HTML code to display content not stored in SharePoint, such as content from Bing Maps, Vimeo, and YouTube. Most of these sources provide methods of generating the HTML code you need to embed in your page.

You can also use this option to display the contents of Word, Excel, or PowerPoint files, when Office Online Server (OOS) is installed in your organization. OOS is a separate product from SharePoint; organizations can use it to deliver browser-based versions of Word, PowerPoint, Excel, and OneNote files, among other capabilities.



**SEE ALSO** For more information about embedding Office documents and PDF files on a website, see “Embed Office documents and PDF files on a website” at <https://aka.ms/Yx8n5e>. For information about embedding an Excel workbook on a webpage, see “Embed your Excel workbook on your web page or blog from SharePoint or OneDrive for Business” at <https://aka.ms/K4c5I6>.

The embedded code is stored in an HTML iFrame tag, which means that your browser can display content stored in SharePoint immediately and it will display the content from the external source when it receives it. If the network connection to the external source is poor or the external source is not responding, you might have unexpected results. For example, if your source is a video source, you could end up with a blank video area on the page, or video buffering or playback problems. When this occurs, it is important to recognize that it is not a



SharePoint issue; you must investigate the network connection and the availability of the external source.



**IMPORTANT** The insertion of an iFrame on a page could be seen as a potential scripting security risk. A site collection administrator can prevent users from using these commands by selecting HTML Field Security in the Site Collection Administration section on the Site Settings page.

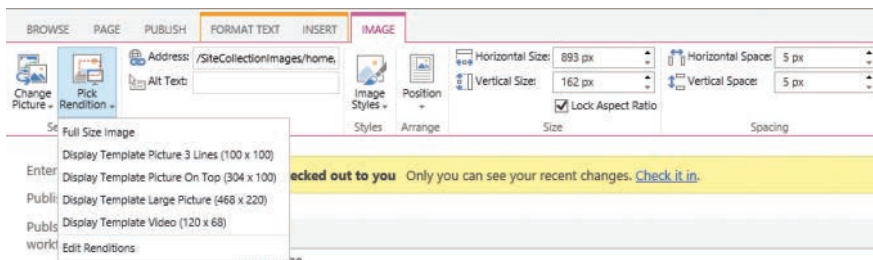
### Contextual tabs

When a component has been inserted onto a page and is selected, additional contextual tabs might be displayed. For example, if an image on a page is selected, the Image contextual tab is displayed. You can use the commands on the Image tab to replace the image, enter alternative text, format the borders of the image, position the image on the page, and reduce the area on the page used to display the image.



**IMPORTANT** The commands in the Size group of the Image tab do not alter the file size of the image; they only place width and height attributes on the <img> HTML tag. Your browser uses these attributes to display the image. For prototyping purposes, this might be adequate; however, the image file could potentially use a large amount of network bandwidth when it is downloaded from SharePoint to your computer, even if the browser then displays the picture at a smaller size than the file's original size. So if you notice that a page takes more time to load than other pages, you might need to look at the size of the image files.

On publishing sites, you need not optimize your images before uploading them into SharePoint, because such sites can use image renditions, as long as your server administrator has configured their use. An image rendition is an optimized, scaled variant generated from the original image. By default, there are four rendition display templates; therefore, after you upload an image, you have the choice of five image sizes on your page: the original size of the image, and a rendition for each display template. You can change the renditions that SharePoint has generated, and if you are a site owner, you can add new rendition display templates.



On a publishing site, on the Image tab, use the Pick Rendition menu to select the image size for an image on your page and to edit the image renditions

### To format text on a page

1. On the page whose content you want to format, activate edit mode.
2. On the **Format** tab, use the commands to format the content as you want.



**TIP** The commands in the Edit, Clipboard, Font, Paragraph, and Styles groups work the same as in any other Office program.

3. Save or save and publish the page.

### To change the layout of a wiki page or a publishing page

1. On the page whose layout you want to change, activate edit mode.
2. Do one of the following to display a list of page layouts:
  - If the page is a wiki page, on the **Format Text** tab, in the **Layout** group, select **Text Layout**.
  - If the page is a publishing page, on the **Page** tab, in the **Page Action** group, select **Page Layout**.
3. Select a layout.
4. Save or save and publish the page.

### To insert a picture, video, or audio

1. On the page where you want to display the picture, video, or audio, activate edit mode and position the cursor where you want to add the image or file.
2. On the **Insert** tab, select the **Picture** button, and then do one of the following:
  - If the file is on your computer, select **From Computer** to open the **Upload Image** dialog, select **Browse**, navigate to the location on your computer where the file is stored, and select **Open**. In the **Destination** list, select the library where you want to upload the file, and then select **OK**.
  - If the file is on the web, select **From Address** to open the **Select Picture** dialog. Enter the web address for the file you want to use, enter alternative text for the file, and then select **OK**.
  - If the file is already in SharePoint on your site, select **From SharePoint** to open the **Select an Asset** dialog, navigate to the folder or library where the file is stored, select the file, and select **Insert**.

Or

On the **Insert** tab, select the **Video and Audio** button, and then do one of the following:

- If the file is on your computer, select **From Computer** to open the Upload Media dialog, select **Browse**, navigate to the location on your computer where the file is stored, and select **Open**. In the **Destination** list, select the library where you want to upload the file, and then select **OK**.
- If the file is on the web, select **From Address** to open the Link Media dialog. Enter the web address for the file you want to use, and then select **OK**.
- If the file is already in SharePoint on your site, select **From SharePoint** to open the Select An Asset dialog, navigate to the folder or library where the file is stored, select the file, and select **Insert**.

3. Save or save and publish the page.

### To format a picture, video, or audio on a page

1. On the page where you want format a picture, video, or audio, activate edit mode.
2. On the **Image or Media** tab, use the commands to format as you want.
3. Save or save and publish the page.

### To insert and edit HTML markup

1. On the page where you want to insert and edit web-related code—for example, if you want to insert new HTML tags or modify the properties of the HTML tags—activate edit mode.
2. Do one of the following:
  - To amend code that was generated by using the Format or Insert tab, place the cursor in the content area where the content is displayed, and then on the **Format Text** tab, in the **Markup** group, select **Edit Source**. Amend or enter the code, and then select **OK**.
  - To insert new code that is not directly related to content you inserted by using the Format or Insert tab, such as JavaScript or HTML code snippets, on the **Insert** tab, in the **Embed** group, select **Embed**. Enter the code, and select **Insert**.
3. Save or save and publish the page.

## To embed code from another source into a page

1. Navigate to the source of the content (for example, a Bing Map or a YouTube video), and use the source site's tools to generate the code you want to embed.
2. Copy the code to the clipboard.
3. Go to the SharePoint page on which you want to display the content, and activate edit mode.
4. On the **Insert** tab, do one of the following to open the Embed dialog:
  - Select the **Video and Audio** arrow, and select **Embed**.
  - In the **Embed** group, select **Embed Code**.
5. In the text area of the Embed dialog, paste the code from the clipboard, and then select **Insert**.
6. Save or save and publish the page.

## Reusable content

On publishing pages, the Insert tab has an extra command, Reusable Content, that you can use to add predefined content to your page—for example, a copyright, a byline, or a quote, such as your company's mission statement. Reusable content is stored in the Reusable Content list at the top-level site of a site collection and can consist of blocks of plain text and HTML elements, such as formatted text, images, tables, and lists. You can use this functionality to create content once, and then allow users who edit pages to reuse these pieces of content.

In the Reusable Content list, you can create categories and folders to help you organize the reusable content items. The items can be designated as automatically updated or not:

- **Automatically updated items** The reusable content is inserted into the page as a read-only reference. When the item is changed in the Reusable Content list, the page content is changed.
- **Not automatically updated items** The reusable content is copied in the page. The page is not updated if the reusable content item is updated in the list.



**IMPORTANT** You must have Contributor permission to add items to the Reusable Content list. To add a reusable content item to your publishing page, you must have read permission to the Reusable Content list. To add or modify a category or folder in the Reusable Content list, you must have the Manage Lists permission.

### To create a reusable content category

1. Navigate to the top-level site of your site collection, and then on the **Settings** menu, select **Site contents** to display the Site Contents page.
2. Select **Reusable Content** to display the default view of the Reusable Content list.
3. On the **List** tab, in the **Settings** group, select **List Settings**.
4. Under **Columns**, select **Content Category**.
5. On the **Edit Column** page, under **Type** each choice on a separate line, enter a name for your new category.
6. At the bottom of the page, select **OK**.

### To create a reusable content item

1. On the **Site Contents** page, select **Reusable Content**.
2. Do one of the following:
  - Select **new item** to create a new reusable HTML item.
  - On the **Items** tab, select the **New Item** arrow, and then do one of the following:
    - To insert plain text, select **Reusable Text**.
    - To insert another type of content, such as rich text or an image, select **Reusable HTML**.
3. Do the following:
  - a. In the **Title** box, enter the title of the reusable content item.
  - b. In the **Content Category** list, select a category.
  - c. If you want the item to be inserted in a page as a read-only reference, select **Automatic Update**; otherwise, leave this check box cleared.
  - d. Enter the reusable content.
  - e. If you chose to create a reusable HTML item, format the text and insert HTML elements.

## Reusable Content

Title \*

Comments

Content Category  ▼

Automatic Update    
 If this option is selected, the content of this list item will be inserted into web pages as a read-only reference. New versions of this item will automatically appear in the web pages. If the option is not selected, the content of this list item will be inserted into web pages as a copy that page authors can then modify. New versions of this item will not appear in the web pages. Any change to this setting will not affect existing web pages that are using this item.

Show in drop-down menu    
 Select this option if you want this reusable content item to appear in a drop-down menu available during page editing. This will offer authors a quick way to add this item to a page.

Reusable HTML

*Use reusable content for content that you find you have to create again and again*

4. Select **Save**.

### To use a reusable content item on a publishing page

1. On the publishing page where you want to use the reusable content, activate edit mode.
2. On the **Insert** tab, select **Reusable Content**, and then select the reusable content item you want to add to the page.

## Manage pages

After you have created several pages, you might need to perform other tasks with them, such as changing the page that is your site's home page, deleting pages, restoring deleted pages, or reviewing the popularity trends of your pages. You can also use alerts to receive email messages whenever a page is changed.



**TIP** Like deleted documents and deleted list items, deleted pages are sent to the Recycle Bin. For more information about the Recycle Bin and about using alerts, see Chapter 3, "Work with content in lists and libraries."

Both the Site Pages and Pages libraries have all the features of document libraries, such as history and version management, so the risk of losing your page changes is low. Major versioning is turned on by default for the Site Pages library, and major and minor versioning for the Pages library. You can also use content approval and workflow, and you can restrict the permissions regarding who can edit and publish pages.



**SEE ALSO** For more information about content approval, see Chapter 4, "Make lists and libraries work for you." For more information about workflow, see Chapter 11, "Work with workflows."

### To view all pages in either the Pages or Site Pages library

1. Do one of the following:
  - Go to a page, and then, on the **Page** tab, in the **Page Library** group, select **View All Pages**.
  - From the **Site Contents** page, select **Pages** or **Site Pages**.

### To make a page the home page for a site

1. Go to the page you want to make the home page.
2. On the **Page** tab, in the **Page Actions** group, select **Make Homepage**.

### To display a page's history

1. Go to the page, and then on the **Page** tab, in the **Manage** group, select **Page History**.

The page history displays static content; additions are displayed in a green font and deletions in a red strikethrough font

7

### To compare two versions of a page

1. Display the page history of the page as described in the previous procedure.
2. In the left navigation pane, below one of the versions you want to use in the comparison, in the **Compare with version** list, select a prior version number.

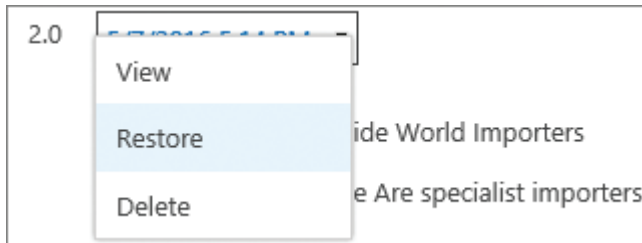
Display what has been added and deleted between one version of the page and another

### To revert to a previous version of a page

1. Do one of the following to display the page's version history:
  - Display the page history of the page as described in the "To display a page's history" procedure earlier in this topic, and then select **Version History**.
  - Display all pages as described in the "To view all pages in either the Pages or Site Pages library" procedure earlier in this topic, select the page you want to revert, and then on the **Files** tab, in the **Manage** group, select **Version History**.

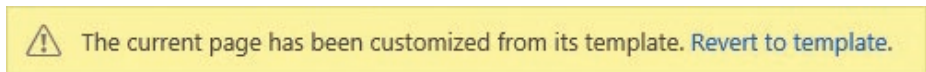


2. Select the date and time in the Modified column for the version you want to restore as the current version, and then select **Restore**.



*Use the menu to view, restore, or delete a version of a page*

3. Select **OK** to confirm that you want to replace the current version of the page with the selected version of the page.
4. Go to the page and, in the yellow notification message, select **Revert to template**.



*The yellow notification message states that the page has been customized from its template*

5. Select **OK**. The yellow notification message disappears.

### To delete a page

1. Do one of the following:
  - Go to the page you want to delete. On the **Page** tab, in the **Manage** group, select **Delete page**, and then select **OK** to confirm that you want to send the page to the site Recycle Bin.
  - Display all pages as described in the “To view all pages in either the Pages or Site Pages library” procedure earlier in this topic, and then do one of the following:
    - Right-click the page, and then select **Delete**.
    - Select the page, and then on the **Files** tab, in the **Manage** group, select **Delete Document**.



**TIP** You cannot delete the home page of a site.

### To restore a deleted page

1. Do one of the following to display the Recycle Bin:
  - On the Quick Launch, select **Recycle Bin**.
  - On the **Site Settings** menu, select **Site Content**, and then select **Recycle Bin**.
2. Select the page you want to restore, and then select **Restore Selection**.
3. Select **OK** to confirm that you want to restore the page.

### To create an alert on a page

1. Go to the page for which you want to set up an alert.
2. On the **Page** tab, in the **Share & Track** group, select **Alert Me**, and then in the list, select **Set an alert on this page**.
3. In the **New Alert** dialog, select your preferences so that you receive an email based on your specific criteria and frequency, and then select **OK**.

## Use app parts and web parts

As you customize your site, you might decide to add information other than static text and images. This information might be stored in lists or libraries or in some other data source. You add such content by using app parts and web parts. You can insert both app parts and web parts on multiple pages, and you can also insert them multiple times on the same webpage.

SharePoint provides built-in app parts and web parts, as detailed in the following table. The category specified in the table is the category name that is displayed when you use the app parts pane. The availability of an app part or web part depends on the type of site you are working with.

Category	Description
Apps	This category contains app parts, which display app information. SharePoint apps are similar to the apps you might find on Facebook or on your smartphone. App parts can also be used to display the contents of list and library apps; each time data in the list or library app changes, the changes are reflected in the app part.
Blog	Use these web parts to help you display and manage blog posts.

Category	Description
Business Data	This category contains web parts related to Business Connectivity Services (BCS) and Microsoft Excel, Visio, and Access.
Community	These web parts are available on community sites. For more information about community sites, see Chapter 9, "Work with wikis, blogs, and community sites."
Content Rollup	These web parts can be used to display content from the current site and from other sites. They include the Content Query, Content Search, and Project Summary web parts.
Document Sets	These web parts can be used to display the contents and properties of document sets. For more information about document sets, see Chapter 14, "Manage and monitor content."
Filters	These web parts can be used to filter the contents displayed by other web parts on the page.
Forms	The web parts in this category can display content from HTML or Microsoft InfoPath forms.
Media and Content	Use these web parts to add content to the page. They include the Content Editor, Script Editor, Image Viewer, and Get Started With Your Site web parts.
Search	These web parts are used with the SharePoint search functionality and on the Search site to display search results and refinements.
Search-Driven Content	These web parts can be used to display the results of a search query.
Social Collaboration	Use these web parts to display socially related content, such as newsfeeds, contact details, and user tasks.
SQL Server Reporting	The web part in this category is used with Microsoft SQL Server Reporting Services.
Miscellaneous	Only one web part is listed in this category: the Case Content web part that is used in the eDiscovery Center.



**TIP** In addition to built-in web parts, you can create your own web parts by using tools such as Visual Studio. You can also import custom web parts.

All app parts and web parts have a set of common properties that you can use to control the part's appearance and behavior, such as toolbar type, chrome type, the part's height and width, and whether users can minimize it so that only the title is visible.

You can configure the common properties by using either the web part tab or the Appearance, Layout, or Advanced section of the web part tool pane.

Each app part and web part can also have a set of custom properties. These properties might be displayed on a separate contextual tab, or they might be in the web part tool pane, in their own section, or in the Miscellaneous section. For example, if you insert an app part on your page that displays the contents of a list, when you select the check box next to the app part title (in edit mode), three tabs appear on the ribbon: Files, Library, and Web Part.



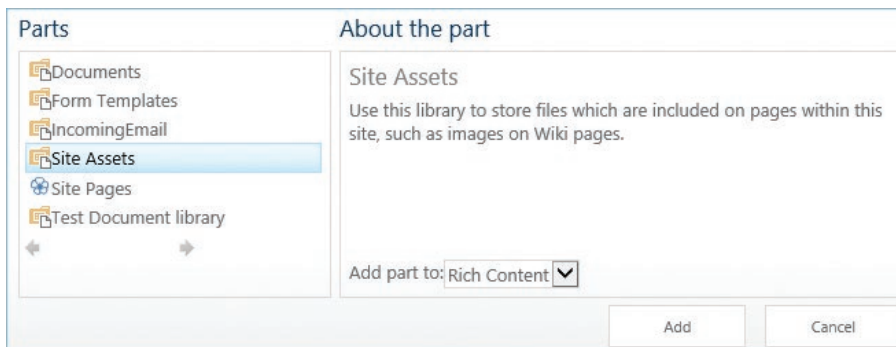
**TIP** If you are having persistent problems with an app part or web part or a web part connection, you can use the Web Part Maintenance page to delete the app part or web part. You can navigate to the Web Part Maintenance page by appending `?Contents=1` to the page's URL; for example, `intranet.wideworldimporters.com/sites/Sales/SitePages/Home.aspx?contents=1`.

### To activate a web part page for editing

1. Go to the page you want to edit, and then on the **Page** tab, select **Edit**.

### To add an app part to a content area

1. On the page where you want to add an app part, activate edit mode and place the cursor where you want the app part to be displayed.
2. On the **Insert** tab, in the **Parts** group, select **App Part** to open the app parts pane.
3. Select the app you want to add to your page.

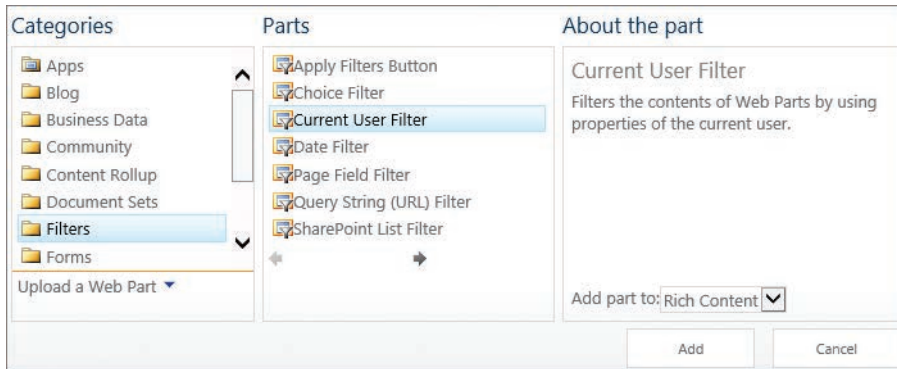


*The app parts pane shows an app part for each list or library on the site, in addition to app parts for apps you have installed*

4. Select **Add**.

### To add a web part to a content area

1. On the page where you want to add the web part, activate edit mode and place the cursor where you want the web part to be displayed.
2. On the **Insert** tab, in the **Parts** group, select **Web Part** to open the web parts pane.
3. Under **Categories**, select a category, and then under **Parts**, select the web part you want to add to your page.



*When a web part is selected, the About The Part section provides a description of the web part*

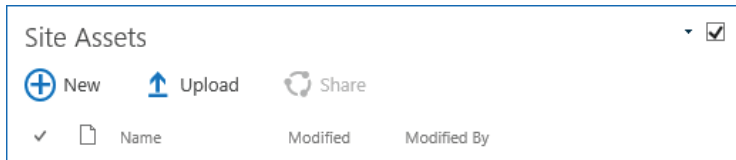
4. Select **Add**.

### To add an app part or web part to a web part zone

1. On the page where you want to add an app part or web part, activate edit mode, and then in the zone where you want to add the app part or web part, select **Add a Web Part** to open the web parts pane.
2. Under **Categories**, select a category, and then under **Parts**, select the web part you want to add to your page.
3. Select **Add**.

### To display the Web Part tab and any other contextual tabs for a web part

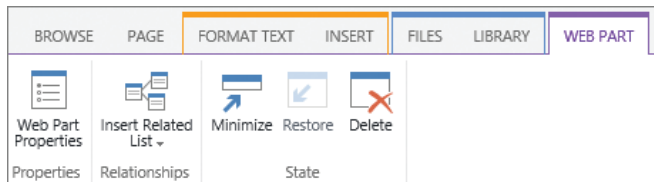
1. In edit mode, select the check box for the web part by selecting the title bar of the web part.



Select the web part's title or check box to display contextual tabs

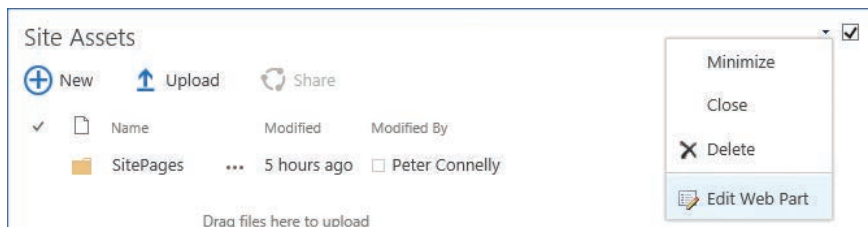
## To open the web part tool pane

- In edit mode, do one of the following:
  - Display the **Web Part** contextual tab, and then select **Web Part Properties**.



Use the Web Part tab to open the web part tool pane, create web part connections to related lists, and minimize, restore, or delete the web part

- Point to the web part, select the arrow on the title bar of the app part or web part, and then select **Edit Web Part**.



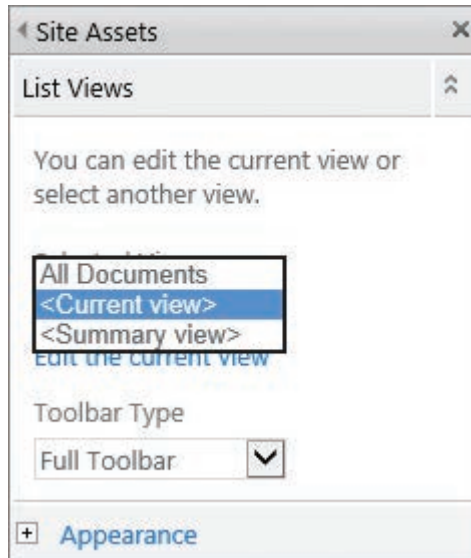
Use the commands on the menu to minimize, close, or delete the web part or app part or to open the properties pane



**TIP** The Web Part tab, web part menu, and web part tool pane can be opened only when you are editing the page.

### To configure the content that a list or library app part displays

1. Open the web part tool pane as described in the previous procedure.
2. In the web part tool pane, immediately below **List Views**, do one of the following:
  - Select a view that was previously created from the list or library.



*Use the List Views section to select the view you want the app part to use and to select the app part toolbar*

- Select **Edit the current view**, and then, if a dialog box opens, select **OK** to save your changes. The Edit View page is displayed. Configure what you want the web part to display, and then select **OK**.



**TIP** You configure a view for an app part the same way you configure a view for a list or library. For more information about views, see Chapter 3, "Work with content in lists and libraries."

**To move an app part or web part to another location on a page**

1. With the page activated for editing, point to the title bar of the app part or web part so that the pointer changes to a four-pointed arrow.
2. Drag the web part to the new area on the page.

**To remove an app part or web part from a page**

1. Do one of the following:
  - Display the **Web Part** tab, and then in the **State** group, select **Delete**.
  - On the web part's title menu, select **Delete**.
2. Select **OK** to confirm that you want to permanently delete the app part or web part.

**To save modifications to a web part page**

1. On the web part page, on the **Page** tab, select **Stop Editing**.

## Skills review

In this chapter, you learned how to:

- Understand SharePoint pages
- Create pages
- Add content to pages
- Manage pages
- Use app parts and web parts





## Practice tasks

The practice files for these tasks are located in the SP2016SBS\Ch07 folder.



**IMPORTANT** You must have sufficient permissions to perform the operations involved in each practice task to complete that practice task. For more information, see Appendix A, “SharePoint 2016 user permissions and permission levels.”

### Understand SharePoint pages

There are no practice tasks for this topic.

### Create pages

Go to a SharePoint team site where you have sufficient rights to create a page, and then perform the following tasks:

1. Create a wiki page named **Wide World Importers**.
2. Position your cursor in the content area, enter **Wide World Importers**, and then on a new line, enter **We are specialist importers of unique furniture** `[[BedRoomFurniture|bedroom furniture]]`, `[[OfficeFurniture|office furniture]]` and `[[GardenFurniture|garden furniture]]` to create three wiki links.
3. Save the page.
4. Select the forward links to create the three pages, and on each page, create a link back to the Wide World Importers page before saving each page.
5. Create a web part page named **Kitchen Furniture**, using the **Header, Left Column, Body** layout, and save it in the **Site Pages** library.
6. Stop editing the page, and leave your browser open if you are continuing to the next set of practice tasks.

## Add content to pages

Go to the Wide World Importers page and activate it for editing, and then perform the following tasks:

1. Change the page layout to **Two columns with header and footer**.
2. Move the text *Wide World Importers* to the top area and style it as **Heading 1**.
3. In the left column content area, do the following:
  - Insert the **pjcov.jpg** picture from the practice file folder, saving the file in the **Site Assets** library.
  - Create a link to the **Kitchen Furniture** page, and then save the page but continue editing.
4. In the bottom content area, insert the **Wildlife.wmv** video from the practice file folder, saving the file in the **Site Assets** library.
5. Use the commands on the **Media** tab to set the video to **Start Automatically** and use a player style of **Light**.
6. Save and check in the page, leaving your browser open if you are continuing to the next set of practice tasks.

## Manage pages

Go to the Wide World Importers page, and then perform the following tasks:

1. View all pages in the **Site Pages** library, and delete the **Kitchen Furniture** page.
2. Display the page history of the **Wide World Importers** page.
3. Compare the current version with version **2.0**, and then restore version **2.0**.
4. Create an alert on the page, retaining the default values.



**TIP** If SharePoint is not configured to send email messages, an Error page will be displayed. If this page appears, you cannot complete the rest of the steps in this procedure. Check with your SharePoint administrator before you proceed.

5. Activate the page for editing, delete the content in the top content area, and save the page.

6. Check that you have received two emails, one stating that an alert was successfully created, and another stating that the page was modified.
7. Use **Manage My Alerts** to delete the alert you created on the Wide World Importers page, and then leave your browser open if you are continuing to the next set of practice tasks.

## Use app parts and web parts

Go to the Wide World Importers page, and then perform the following tasks:

1. Activate the page for editing, and in the top content area, add an app part for the **Site Assets** library.
2. Open the **Site Assets** web part tool pane.
3. Change the title to **Image and Video files** and the **Chrome Type** to **Title and Border**, and prevent users from minimizing the app part.
4. Apply your changes.
5. Edit and save the current view so that the **Modified** and **Modified By** columns are not displayed in the app part.

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