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# SharePoint® 2013 onDemand

Steve Johnson, Perspection, Inc.



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# SharePoint® 2013 on Demand

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### **Publisher**

Paul Boger

### **Associate Publisher**

Greg Wiegand

### **Executive Editor**

Loretta Yates

### **Managing Editor**

Steve Johnson

### **Author**

Steve Johnson

### **Page Layout**

James Teyler

### **Interior Designers**

Steve Johnson

Marian Hartsough

### **Photographs**

Tracy Teyler

### **Indexer**

Kristina Zeller

### **Proofreader**

Beth Teyler

### **Team Coordinator**

Cindy Teeters

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## About the Author

**Steve Johnson** has written more than 80 books on a variety of computer software, including Adobe Photoshop CC, Adobe InDesign CC, Adobe Illustrator CC, Adobe Dreamweaver CS6, Adobe Edge Animate, Adobe Flash Professional CS5, Microsoft Windows 8, Microsoft Office 2013 and 2010, Microsoft Office 2008 for the Macintosh, and Apple OS X Mountain Lion. In 1991, after working for Apple Computer and Microsoft, Steve founded Perspection, Inc., which writes and produces software training. When he is not staying up late writing, he enjoys coaching baseball, playing golf, gardening, and spending time with his wife, Holly, and three children, JP, Brett, and Hannah. Steve and his family live in Northern California, but can also be found visiting family all over the western United States.

A large, light blue, lowercase letter 'a' is positioned in the bottom left corner of the page, partially overlapping the light blue vertical bar.

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# Introduction

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Welcome to *SharePoint 2013 on Demand*, a visual quick reference book that shows you how to work efficiently with Microsoft SharePoint. This book provides complete coverage of basic to advanced SharePoint skills.

## How This Book Works

You don't have to read this book in any particular order. We've designed the book so that you can jump in, get the information you need, and jump out. However, the book does follow a logical progression from simple tasks to more complex ones. Each task is presented on no more than two facing pages, which lets you focus on a single task without having to turn the page. To find the information that you need, just look up the task in the table of contents or index, and turn to the page listed. Read the task introduction, follow the step-by-step instructions in the left column along with screen illustrations in the right column, and you're done.

## What's New

If you're searching for what's new in SharePoint 2013, just look for the icon: **New!**. The new icon appears in the table of contents and throughout this book so you can quickly and easily identify a new or improved feature in SharePoint 2013. A complete description of each new feature appears in the New Features guide in the back of this book.

## Keyboard Shortcuts

Most menu commands have a keyboard equivalent, such as Ctrl+B, as a quicker alternative to using the mouse. A complete list of keyboard shortcuts is available on the web at [www.queondemand.com](http://www.queondemand.com) or [www.perspection.com](http://www.perspection.com).

## How You'll Learn

**How This Book Works**

**What's New**

**Keyboard Shortcuts**

**Step-by-Step Instructions**

**Real World Examples**

**Workshops**

**Microsoft Certification**

**Get More on the Web**





# Step-by-Step Instructions

This book provides concise step-by-step instructions that show you “how” to accomplish a task. Each set of instructions includes illustrations that directly correspond to the easy-to-read steps. Also included in the text are time-savers, tables, and sidebars to help you work more efficiently or to teach you more in-depth information. A “Did You Know?” provides tips and techniques to help you work smarter, while a “See Also” leads you to other parts of the book containing related information about the task.

**Touring SkyDrive**

SkyDrive allows you to manage, share, and work with documents in a SharePoint cloud with SkyDrive Pro (Business). SkyDrive Pro performs the same function for SharePoint sites as the stand-alone SkyDrive app—SkyDrive (Win 8) or SkyDrive for Windows (Win 7)—do for SkyDrive personal. With SkyDrive Pro, you can connect to and synchronize the contents of the SkyDrive library on a SharePoint or Office 365 site with a folder on your desktop or device with a SkyDrive Pro sync client app. In Windows Explorer, your synced SkyDrive is listed in your Favorites in a folder named SkyDrive Pro, where you can directly work with files.

**Use SkyDrive Pro on SharePoint to Sync Files**

- 1 In your web browser, open your SharePoint site.
- 2 Click SkyDrive on the Navigation bar.
- 3 Use the site commands to add, remove, or edit files.
- 4 Click the Sync button on the Navigation bar.
- 5 Click Sync Now.

SharePoint starts syncing the library.

- 6 To open your synced library folder in Windows Explorer, click Show my files.

**Did You Know?**

There are some limits on syncing metadata. You can sync up to 20,000 items in your SkyDrive Pro library or 5,000 items in other SharePoint libraries. In any library, you can download files up to 2 GB in size.

**See Also**

See Chapter 7, “Working with SkyDrive Documents” on page 159 for more information on using SkyDrive Pro.

80 Chapter 2

Numbered steps 1-6 are shown in the text. Red callouts 1-6 point to corresponding elements in the screenshots: 1 points to the SkyDrive link in the navigation bar; 2 points to the Sync button; 3 points to the Sync Now button; 4 points to the Sync button in the Windows Explorer view; 5 points to the Sync Now button in the Windows Explorer view; 6 points to the Sync Now button in the Windows Explorer view.

**Easy-to-follow introductions focus on a single concept.**

**Illustrations match the numbered steps.**

**Numbered steps guide you through each task.**

**See Also points you to related information in the book.**

**Did You Know? alerts you to tips, techniques and related information.**

# Real World Examples

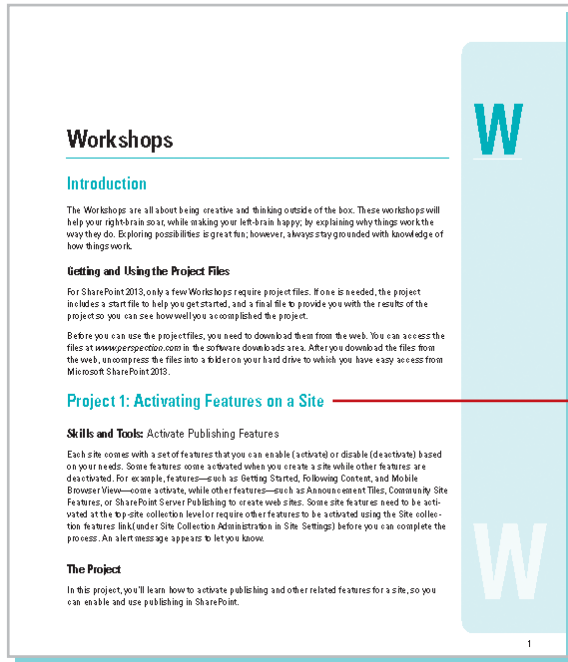
This book uses real world examples files to give you a context in which to use the task. By using the example files, you won't waste time looking for or creating sample files. You get a start file and a result file, so you can compare your work. Not every topic needs an example file, such as changing options, so we provide a complete list of the example files used through out the book. The example files that you need for project tasks along with a complete file list are available on the web at [www.queondemand.com](http://www.queondemand.com) or [www.perspection.com](http://www.perspection.com).

SharePoint social site showing a conversation thread. The thread includes a post about rescheduling a meeting and several replies. A red callout points to the 'Following' section on the right side of the page, which shows 0 people following the user.

**Real world examples help you apply what you've learned to other tasks.**

# Workshops

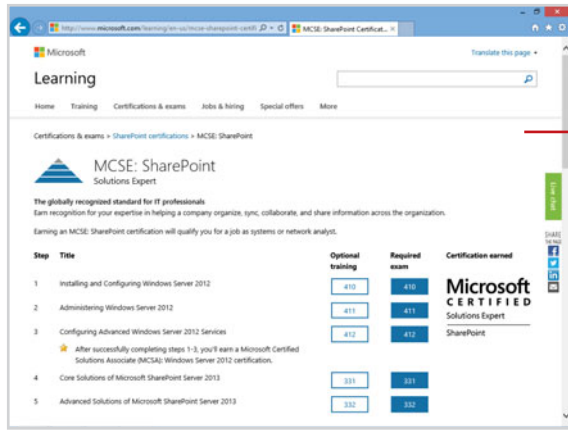
This book shows you how to put together the individual step-by-step tasks into in-depth projects with the Workshops. You start each project with a sample file, work through the steps, and then compare your results with a project results file at the end. The Workshop projects and associated files are available on the web at [www.queondemand.com](http://www.queondemand.com) or [www.perspection.com](http://www.perspection.com).



The **Workshops** walks you through in-depth projects to help you put SharePoint to work.

# Microsoft Certification

This book includes related content for the Microsoft Certification exam (70-331) for Microsoft SharePoint 2013. Each certification exam has a set of objectives, which are organized into broader skill sets. To prepare for the certification exam, you should review and perform each task identified with an objective to confirm that you can meet the requirements for the exam. Information about the certification program and objectives are available online from Microsoft at [www.microsoft.com](http://www.microsoft.com).



Microsoft **Certification** allows you to become an expert on SharePoint.

## Get More on the Web

In addition to the information in this book, you can also get more information on the web to help you get up to speed faster with SharePoint 2013. Some of the information includes:

### Transition Helpers

- ◆ **Only New Features.** Download and print the new feature tasks as a quick and easy guide.

### More Content

- ◆ **Photographs.** Download photographs and other graphics to use in your Office documents.
- ◆ **More Content.** Download new content developed after publication.

You can access these additional resources on the web at [www.perspection.com](http://www.perspection.com).

## Keyboard Shortcuts

### Microsoft SharePoint 2013

If a command on a menu includes a keyboard reference, known as a keyboard shortcut, to the right of the command name, you can perform the action by pressing and holding the first key, and then pressing the second key to perform the command quickly. In some cases, a keyboard shortcut uses three keys. Simply press and hold the first two keys, and then press the third key. Keyboard shortcuts provide an alternative to using the mouse and make it easy to perform repetitive commands.

If you're searching for new keyboard shortcuts in SharePoint 2013, just look for the letter: **K**. The **K** appears in the Keyboard Shortcuts table so you can quickly and easily identify new or changed shortcuts.

Keyboard Shortcuts	
Command	Windows
<b>All Pages</b>	
Turn More Accessible Mode on or off	Tab (Press repeatedly, immediately after you open the page in a browser)
Activate the Sky Ribbon Commands link	Alt+Y
Activate the View All Site Content link	Alt+3
Activate the Site Actions menu	Alt+F
Activate the Search box	Alt+S
Activate the Help link	Alt+6
Activate the Home link	Alt+1
Activate the Username menu	Alt+W
Expand menus for a list item	Shift+Enter
Move the selection from Web Part to Web Part	Alt+W
<b>Edit Rich Text</b>	
Apply or remove bold formatting from the selected text	Ctrl+B
Apply or remove italic formatting from the selected text	Ctrl+I

Additional content is available on the web. You can download keyboard shortcuts.

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# Creating a SharePoint Site

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## Introduction

The SharePoint comes with a variety of different types of sites, such as a team, web, blog, and document center. A site is a group of related pages and apps where users can collaborate on projects and share information. Each site can include multiple subsites and pages that relate to the main site. A subsite can also include its own subsites and pages. A main site and its group of subsites and pages is called a site collection, which create a hierarchy or levels. The main site, also known as the top-level site, requires administration permissions in order to manage it. When you create a subsite, it inherits the permissions, navigation, and appearance of the parent site, the site from which you created it.

You can create a site by using a SharePoint site template. The template provides the base functionality for the site, which you can add or remove features to customize it. Sites in SharePoint are organized on the Sites pages, where you can access them using links, including ones you're following. You can access a SharePoint site by navigating to the Sites page and using a site link or entering the complete address to the direct site. When you work with and maintain a site, there are two main areas you need to know about. One is Site Contents and the other is Site Settings. Site contents allows you to view and manage all of the libraries, lists, applications, and subsites on the site, while Site Settings allows you to access the administrative options you need to manage and customize the site, such as changing the site title, logo, and look. Each site comes with one or more pages, such as the Home page, which you can view or add new ones to customize the site.

## What You'll Do

**Create a SharePoint Site**

**View a Site Window**

**Get Around the Site**

**View Site Content**

**Change a Site Title and Logo**

**Change the Look of a Site**

**Change Language and Regional Settings**

**Change and Create Navigation Links**

**Use Navigation Aids**

**Search for Site Content**

**Open or Add a Site Page**

**Work with Site Pages**

**View a Site Hierarchy**

**Manage Site Features**

**Explore Site Features**

**Share a Site**

**Save a Site Template**

**Delete a Site**

**Use Site Closure and Deletion Settings**

# Creating a SharePoint Site

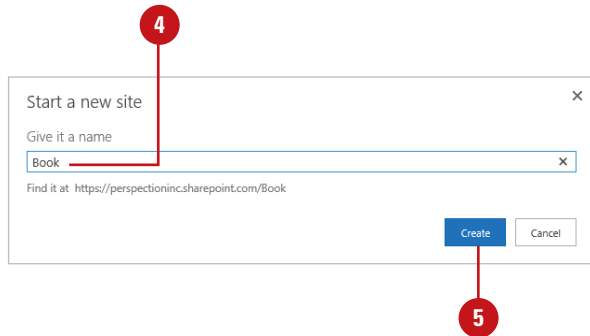
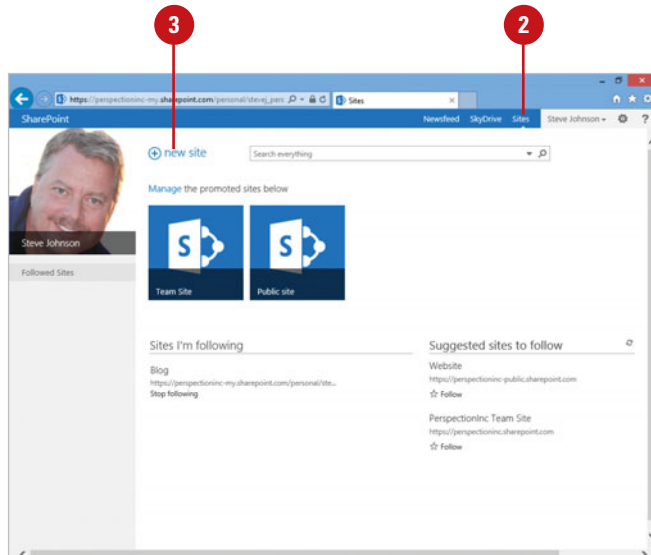
During the SharePoint installation, some initial sites get set up. However, once everything is set up and you have the right permissions, you can create a site in SharePoint. Each site can also include multiple subsites and pages that relate to the main site. You can create a subsite by using a SharePoint site template (**New!**). A SharePoint template provides the base functionality for the site, which you can add or remove features to customize it. SharePoint organizes templates into categories: Collaboration, Enterprise, Publishing, and Duet Enterprise. However, category and template availability vary based on your SharePoint edition.

## Create a New SharePoint Site

- 1 In your web browser, open your SharePoint site.
- 2 Click **Sites** on the Navigation bar.
- 3 Click **new site**.
- 4 Enter a site name.  
The direct URL for the site appears under the Name box.
- 5 Click **Create**.

### See Also

See "Deleting a SharePoint Site" on page 72 for information on removing a SharePoint site.

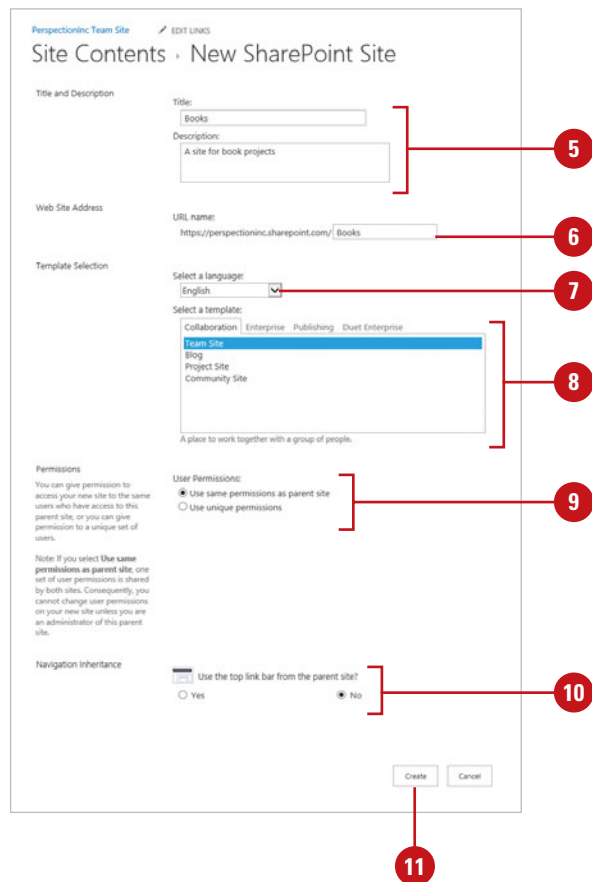
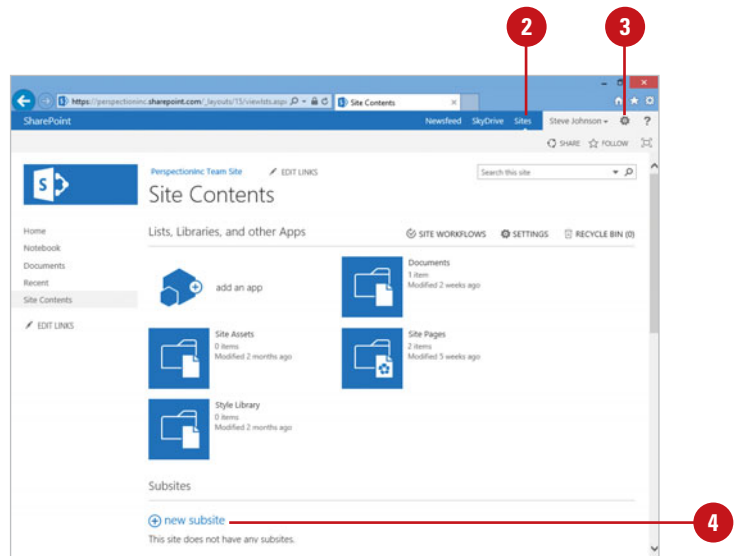


## Create a Subsite Under a Site

- 1 In your web browser, open your SharePoint site.
- 2 Click **Sites** on the Navigation bar, and then navigate to the Home page where you want to create a subsite.
- 3 Click the **Settings** button (Gear icon), and then click **Site contents**.  
The Site Contents page appears.
- 4 Scroll to the bottom of the page, and then click **new subsite**.
- 5 Enter a title and description for the site.
- 6 Enter a URL name for the site, which is added to the root site.
- 7 Click the **Language** list arrow, and then select a language.
- 8 Click a template tab, and then select the site template you want.
- 9 Click the **Use same permissions as parent site** or **Use unique permissions** option to select user permissions for the site.
- 10 Click **Yes** or **No** to select navigation options for the site.
- 11 Click **Create**.

### Did You Know?

**You can create a subsite in Site Settings.** Click the Settings button (Gear icon), click Site settings, click the Sites and workspaces link under Site Administration, click Create, specify site information, and then click Create.

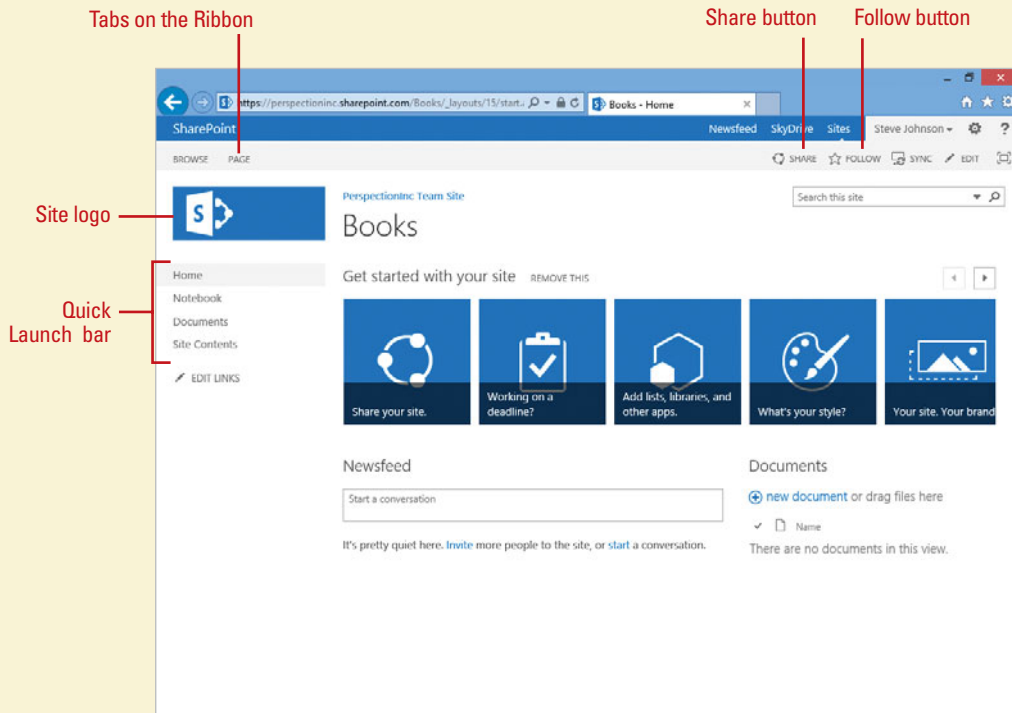


# Viewing a Site Window

When you open a site, the site window appears with navigation and commands you can use to work with it. Each site contains content and commands based on the template used to create it. So, not everyone is going to look the same. Here is a look at the site window Home page for a Team site.

Here are the common site elements that appear on a site:

- ◆ **Site logo.** Displays a logo representing the site. Clicking the logo takes you to the Home page.
- ◆ **Quick Launch bar.** Displays a list of navigation options, including Home, Notebook, Documents, and Site Contents.
- ◆ **Share button.** Allows you to send an email to others with specified permissions to share the site.
- ◆ **Follow button.** Allows you to add the site to the Sites page where you can easily access it in the future.



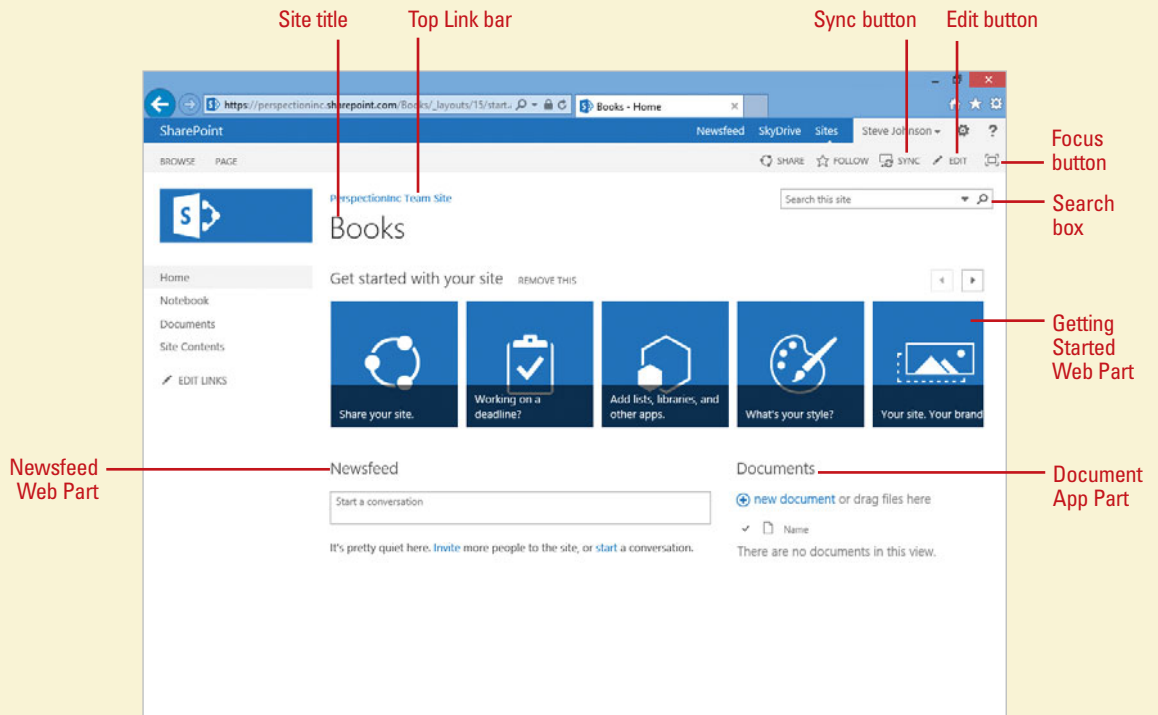


- ◆ **Sync button.** Allows you to synchronize the site contents locally on your computer for offline access.
- ◆ **Edit button.** Allows you to make changes to the site page.
- ◆ **Focus button.** Expands or collapses the left pane with the site logo and Quick Launch bar.
- ◆ **Top Link bar.** Allows you to navigate the site with links inherited from the parent.
- ◆ **Search box.** Allows you to search the contents of the site.

- ◆ **Site title.** Displays the title of the site.

Here are the site specific elements that appear on the Home page for a Team site:

- ◆ **Getting Started Web Part.** Provides a tiled menu for easy access to site options.
- ◆ **Document App Part.** Allows you to view and work with documents in Document libraries on the Home page.
- ◆ **Newsfeed Web Part.** Allows you to view recent postings by others and make a posting on the Home page.



# Getting Around a Site



Sites in SharePoint are organized on the Sites pages, where you can access them using links, including ones you're following. You can access a SharePoint site by navigating to the Sites page and using a site link or entering the complete address to the direct site. When you access a site, the Home page for the site appears, which works similar to a Home page for a web site. The Home page appears with content you can customize. On the Home page, you can get around the site by using links on the Top Links or Quick Launch bar (in the left column) or on the page. If a site has a subsite, you can access it using links on the Top Links bar and from the Site Contents page. You can follow a site or subsite on the Sites page for easy access.

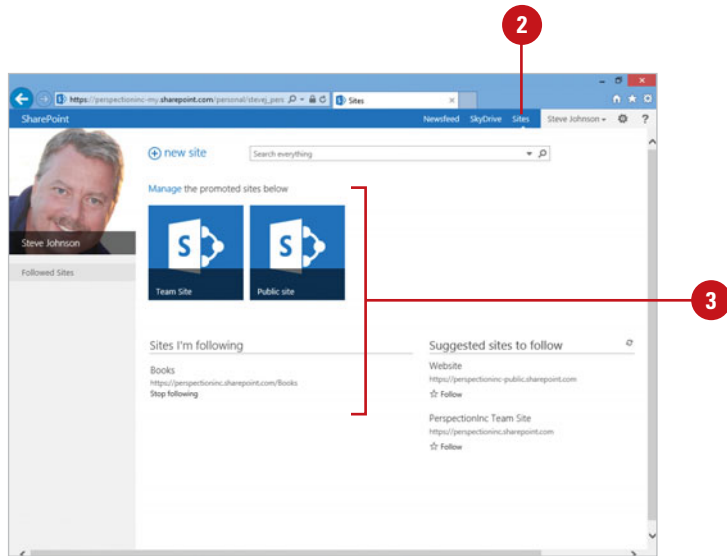
## Get to the Top-Level Sites

- 1 In your web browser, open your SharePoint site.
- 2 Click **Sites** on the Navigation bar.  
The top-level sites appear on the Sites page.
- 3 To open a site, click a site link.
  - ◆ **Promoted Sites.** Click the site tile to open it.
  - ◆ **Sites I'm following.** Click the site name link to open it.

The Home page for the site appears in your web browser.

## Did You Know?

**You can follow a site.** Go to the Home page for the site, and then click the Follow button below the Navigation bar. The site appears on the Sites page for easy access. You can also access a followed site from the Newsfeed pane.



## Get Around Within a Site

- 1 Open your web browser.
- 2 In the Address bar, enter the main or direct site address.
  - ◆ **Main Address.** Go to your SharePoint server address, click **Sites** on the Navigation bar, and then click the site name.
  - ◆ **Direct Address.** Go to the direct SharePoint site address. For example, `https://sharepoint address/site name`.

The Home page for the site appears in your web browser.

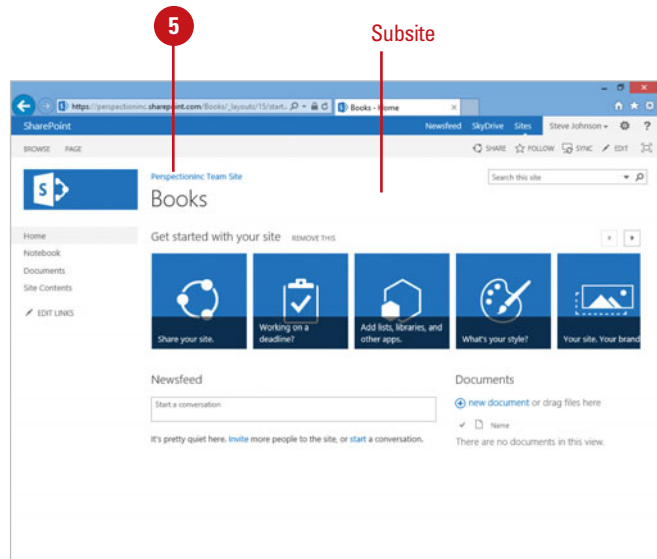
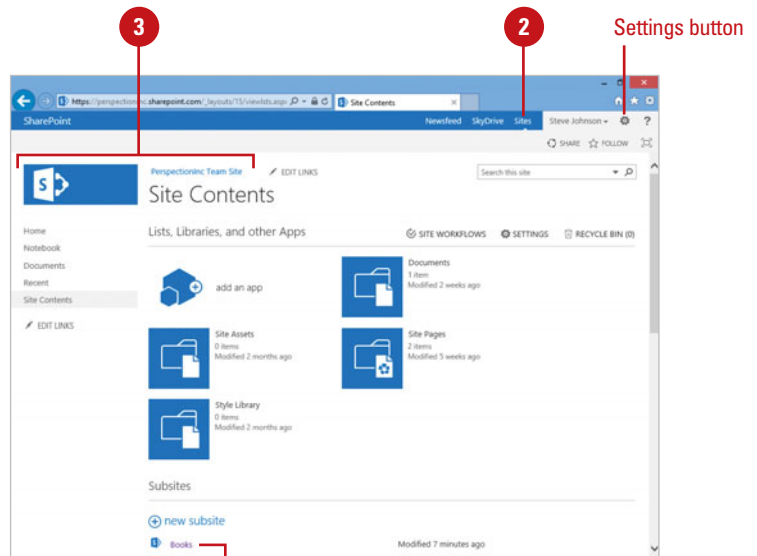
- 3 To navigate the site, click a link on the Top Links or Quick Launch bar or on the page.
  - ◆ You can click **Home** on the Quick Launch bar to return to the site Home page.

**TIMESAVER** Click the *SharePoint logo* to return to the Home page.

- ◆ You can click the **Back** button in your web browser to go back to the previous page.
- 4 To navigate to a subsite, click **Site Contents** on the Quick Launch bar, scroll to the bottom, and then click a link to a subsite.
    - ◆ You can also click a subsite link on the Top Links or Quick Launch bar, if available.

When you access a subsite, the Home page for the site opens, leaving the parent site.

- 5 To return to the main site, click the site link on the Top Links bar.

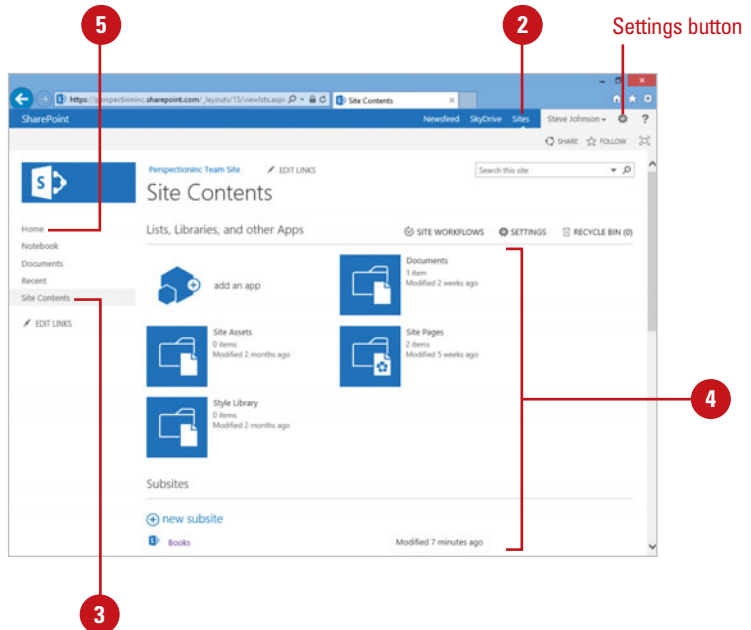


# Viewing Site Content

When you work with and maintain a site, there are two main areas you need to know about. One is Site Contents and the other is Site Settings. Site contents allows you to view and manage all of the libraries, lists, applications, and subsites on the site, while Site Settings allows you to access the administrative options you need to manage and customize the site. You can access Site Contents and sites setting on the Settings menu or Quick Launch bar.

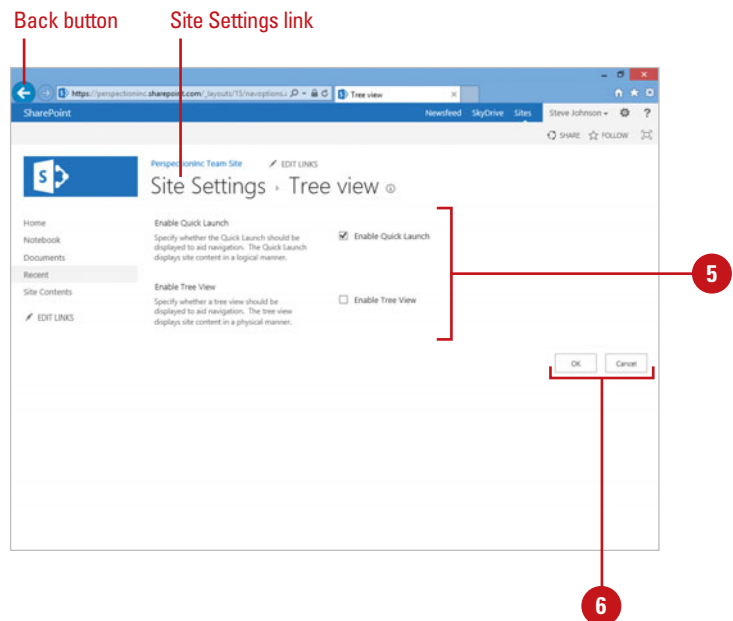
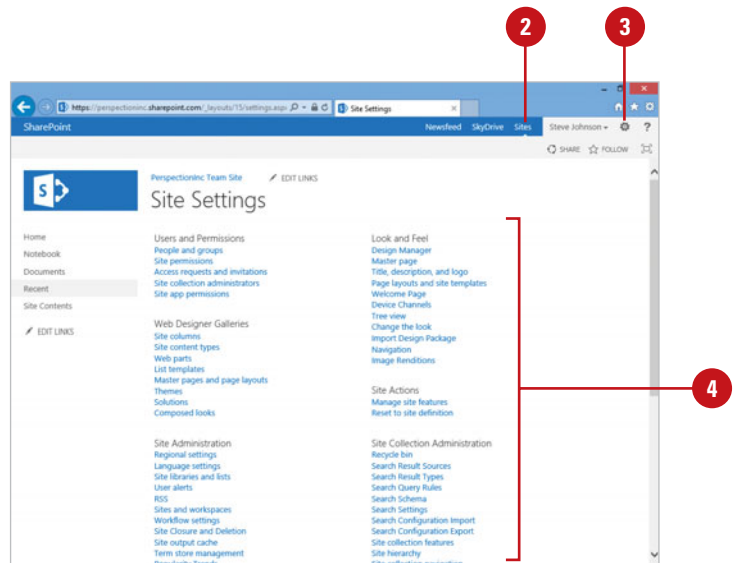
## View Site Contents

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to view.
- 3 To open the Site contents page, use any of the following:
  - ◆ **Quick Launch.** Click **Site Contents** on the Quick Launch bar.
  - ◆ **Settings Menu.** Click the **Setting** button (Gear icon), and then click **Site contents**.
- 4 On the Site Contents page, you can do any of the following:
  - ◆ **Add an app.** Click **Add an app**, and then select the app you want.
  - ◆ **Change app settings.** Point to an app, click the **More Options** button (. . .), and then click **Settings**.
  - ◆ **Remove an app.** Point to an app, click the **More Options** button (. . .), and then click **Remove**.
  - ◆ **Create a subsite.** Click the **new subsite** button, specify site information, and then click **Create**.
  - ◆ **Open a subsite.** Click the subsite name.
- 5 To return to the Home page, click **Home** on the Quick Launch bar.



## View Site Settings

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to view.
- 3 Click the **Settings** button (Gear icon) on the Navigation bar, and then click **Site settings**.
- 4 Click a link for the settings you want to view and edit.
  - ◆ **Setting ToolTip**. Point to a link to display a tooltip with a short description of the option.
- 5 View the settings, and then make any changes as desired. Click any additional links as needed.
- 6 Return to the Site Settings page using one of the following:
  - ◆ **Button**. Click **OK** to accept the changes or click **Cancel** to revert back.
  - ◆ **Site Settings Link**. Click the **Site Settings** link.
  - ◆ **Back Button**. Click the **Back** button in your web browser.

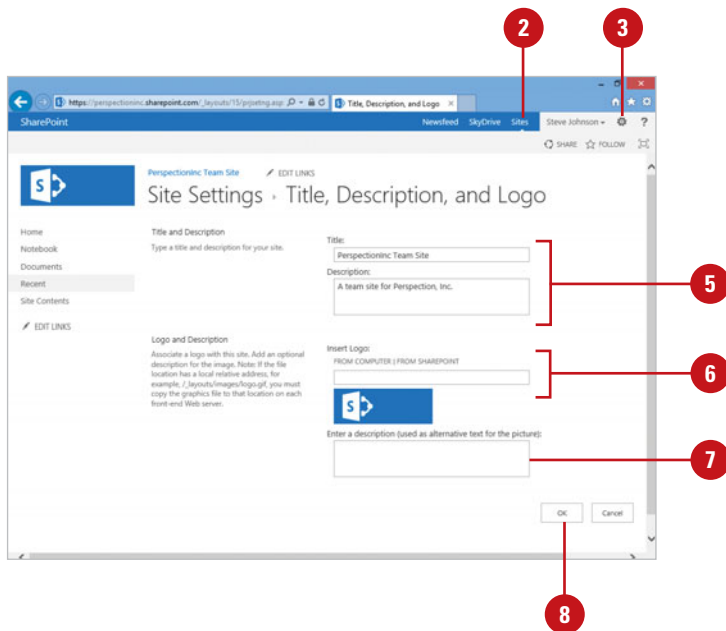


# Changing a Site Title and Logo

## Change a Site Title, Description, or Logo

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to change.
- 3 Click the **Settings** button (Gear icon) on the Navigation bar, and then click **Site settings**.
- 4 Under Site Administration, click the **Title, description, and logo** link.
- 5 Enter a title and description for the site.
- 6 Use any of the following to insert a logo:
  - ◆ **Computer.** Click **From Computer**, click **Browse**, select a file, click **Open**, and then click **OK**.
  - ◆ **SharePoint.** Click **From SharePoint**, select the site folder with the file, click the file, and then click **Insert**.
- 7 Enter a description for the logo picture, which is used as alternative text for readers.
- 8 Click **OK**.

A site's title, description, and logo appear throughout the site. For example, when you open the Home page for a site, the logo and title appear at the top of the page. They also appear within search results too. You can change your site's title, description, and logo by using Site Settings. When you want to change a site logo, you can select a file from your local computer or a location on your SharePoint site.



# Changing the Look of a Site

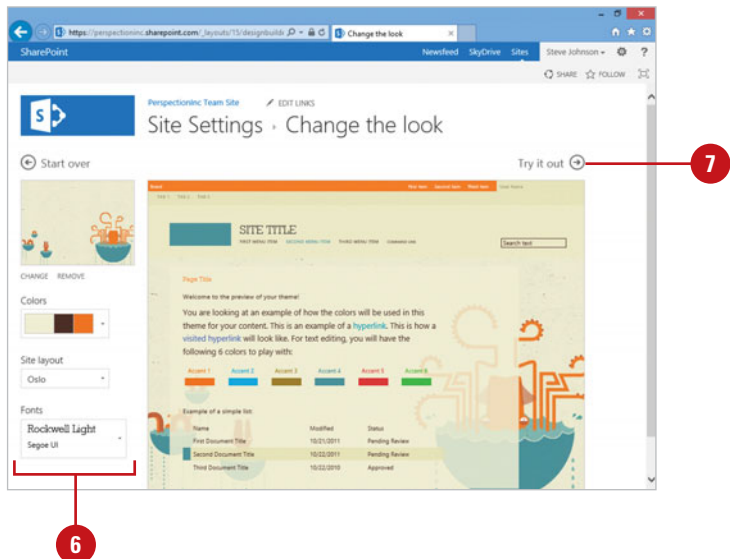
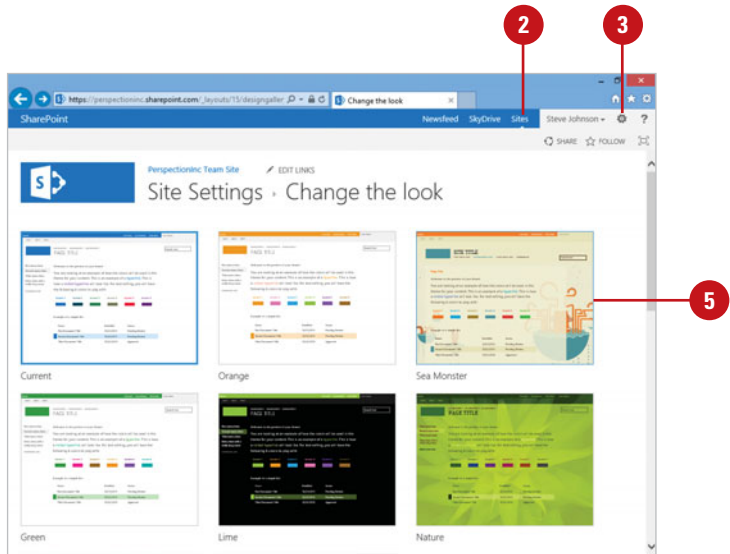
## Change the Look of a Site

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to change.
- 3 Click the **Settings** button (Gear icon) on the Navigation bar, and then click **Site settings**.
- 4 Under Site Administration, click the **Change the look** link.

**TIMESAVER** Click the *Settings* button (Gear icon) on the *Navigation bar*, and then click *Change the look* or *Design Manager*.

- 5 Click the display template you want to use.
- 6 Use any of the following to format the template:
  - ◆ Click the **Color** list arrow, and then select a color scheme.
  - ◆ Click the **Site layout** list arrow, and then select a non-default site layout from the template.
  - ◆ Click the **Fonts** list arrow, and then select a non-default font for the template.
- 7 Click **Try It Out**.
  - ◆ If you don't like the results, you can click **Start over** to begin the process again.
- 8 Click **Yes, Keep it** to save your changes or click **No, not quite there** to cancel changes.

One of the most common changes users make to a site is to change the look and feel (**New!**) to customize it. SharePoint comes with a collection of templates, which includes a color scheme, layout, and fonts. After you select a template, you can use the defaults settings or modify the color scheme, layout, and fonts to suit your needs. A preview of your results appears in the window, so you can experiment to create the look you want. If you don't like the results, you can start over again.



# Changing Language and Regional Settings

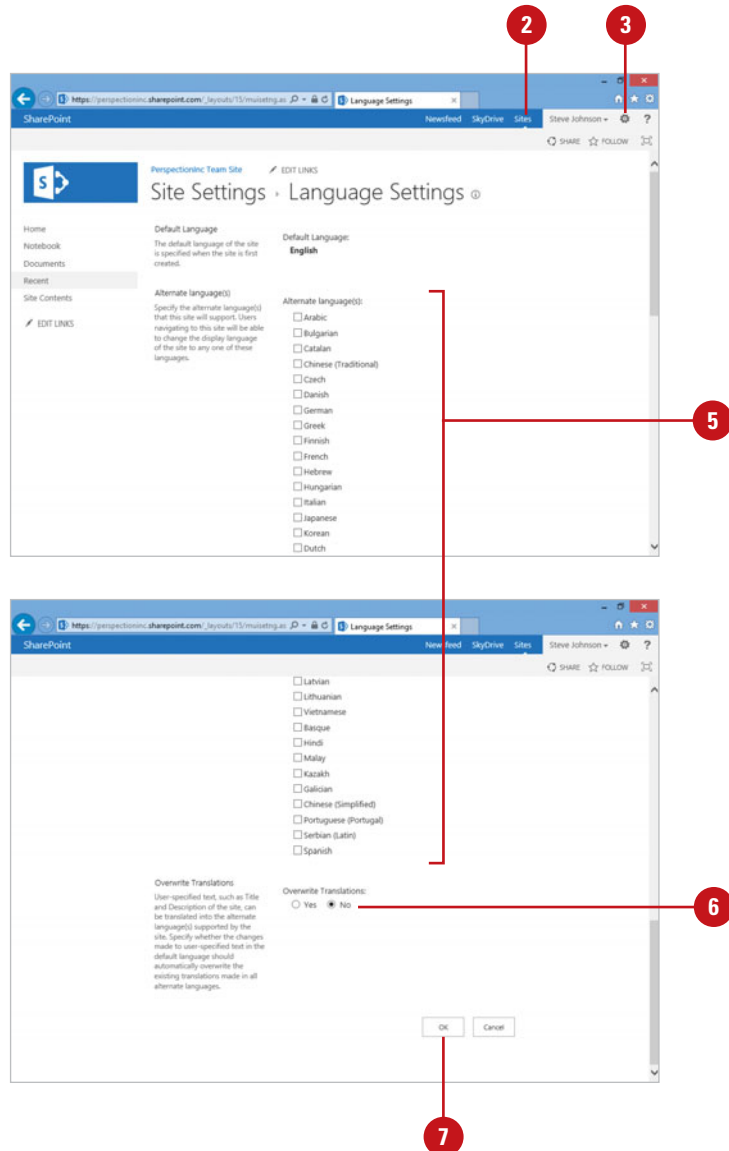
## Specify Alternate Languages for a Site

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to change.
- 3 Click the **Settings** button (Gear icon) on the Navigation bar, and then click **Site settings**.
- 4 Under Site Administration, click the **Language settings** link.

The default language is specified at the top of the page.

- 5 Select the check box next to the alternate languages you want to enable.
- 6 Click the **Yes** or **No** option to enable the changes made to user-specified text in the default language to automatically overwrite the existing translations make in all alternate languages.
- 7 Click **OK**.

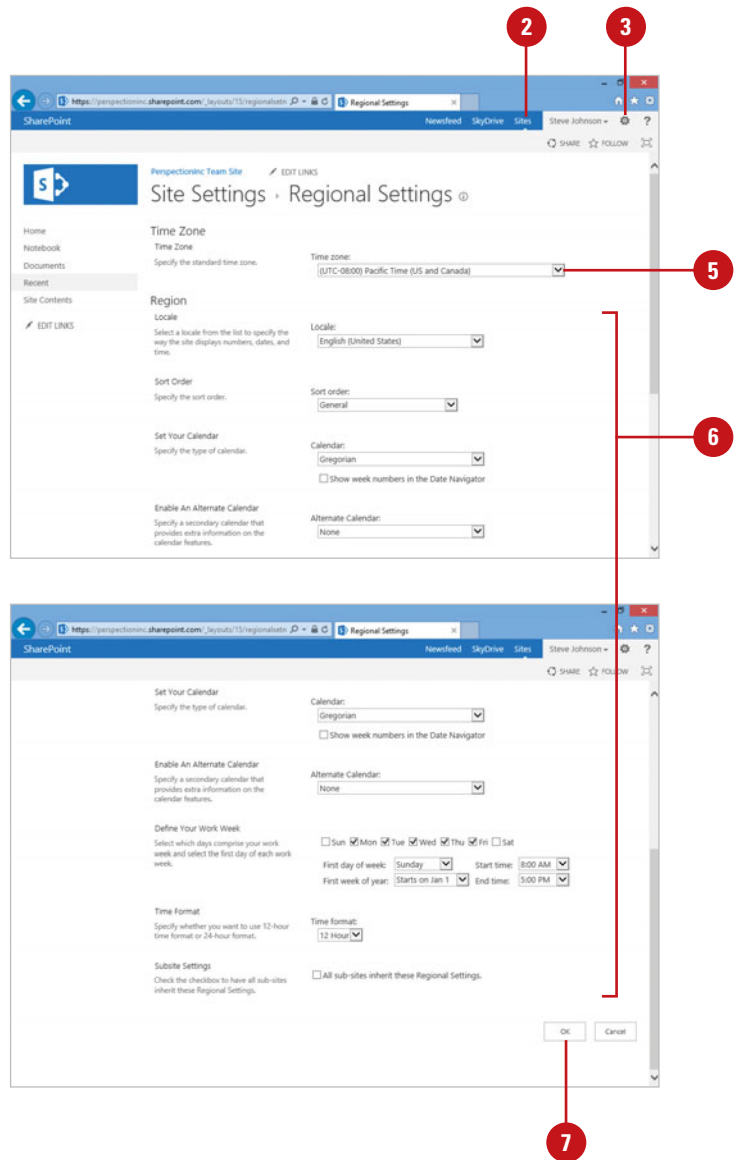
When you create a site, you also specify a default language for the site. However, you can also specify alternate languages for the site. users navigating the site will be able to change the display language to any language specified in the Alternate languages list. In addition to alternate language options, you can also set regional options, such as time zone, locale display for numbers, dates, and time, sort order, calendar type, work week, and time format (12 or 24 hour).





## Change Site Regional Settings

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to change.
- 3 Click the **Settings** button (Gear icon) on the Navigation bar, and then click **Site settings**.
- 4 Under Site Administration, click the **Regional settings** link.
- 5 Click the **Time zone** list arrow, and then select the time zone in your area.
- 6 Specify the following Region options:
  - ◆ **Locale.** Select a language locale to display numbers, dates, and time.
  - ◆ **Sort Order.** Select a language for sort order.
  - ◆ **Set Your Calendar.** Select a calendar type, such as Gregorian, Japanese Emperor Era, Buddhist, or Hebrew Lunar.
  - ◆ **Enable An Alternate Calendar.** Select a calendar type for a secondary calendar.
  - ◆ **Define Your Work Week.** Select options to define your work week.
  - ◆ **Time Format.** Select a time format as 12 or 24 hour.
- 7 Click **OK**.

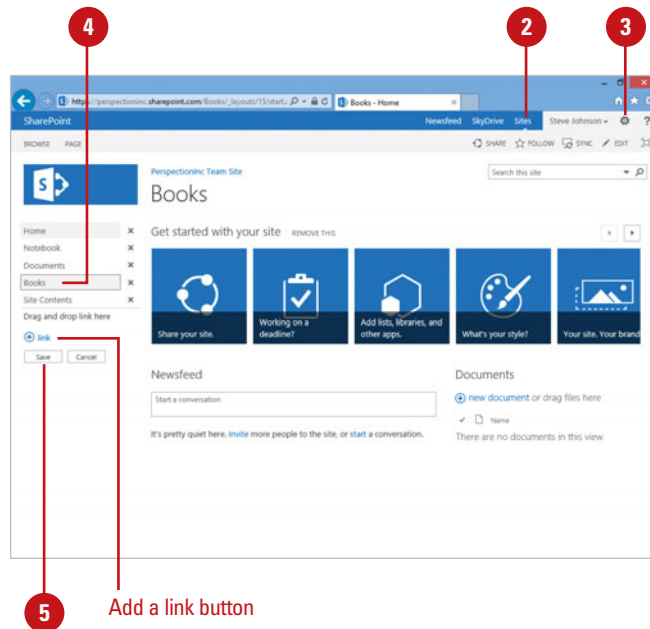


# Changing and Creating Navigation Links

## Add a Site Navigation Link

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to change.
- 3 Click the **Edit Links** button on the Quick Launch bar or Top Links bar.
- 4 To add a link, use any of the following:
  - ◆ **Drag and Drop.** Drag a header to “Drag and drop link here.”
  - ◆ **Add a Link.** Click the **Add a link** button, specify a link name and an address to the link, and then click **OK**.
- 5 Click the **Save** button.

Each site in SharePoint provides navigation links on the Top Links bar and Quick Launch bar. The links on the Top Links bar includes Home, page links, and any other subsite names. The Top Links bar inherits navigation from the parent site, if available. The links on the Quick Launch bar includes Home and Site Contents and any site specific ones based on the template, such as Documents. In addition to the navigation links, the Top Links bar and Quick Launch bar also includes an Edit Links button, where you can change, remove, and add links. You can add a link by dragging and dropping an item or using the Add a link button. When you use the Add a link button, you'll need to know the URL address to the link.



Add a link dialog box

The 'Add a link' dialog box contains the following fields and buttons:

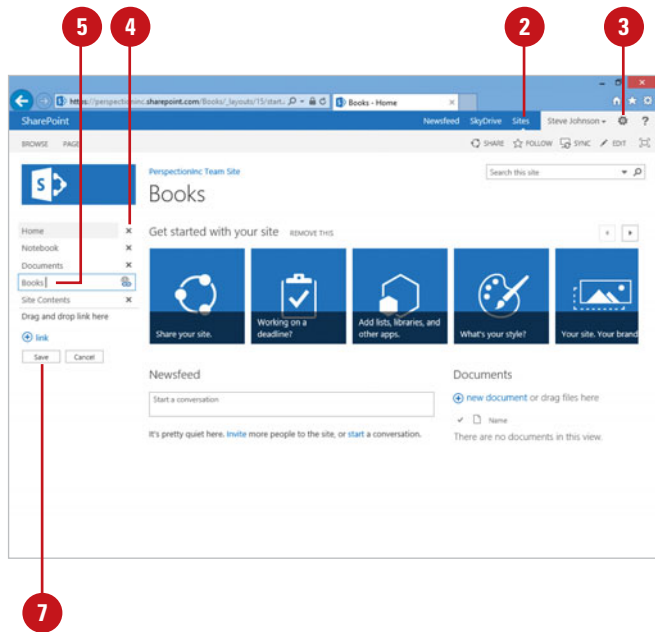
- Text to display:** A text input field containing the word 'Books'.
- Address:** A text input field containing the URL '/Books/\_layouts/15/start.aspx#/SitePages/Home.aspx'.
- Buttons:** 'OK', 'Cancel', and a 'Try link' button.

## Change or Remove a Site Navigation Link

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to change.
- 3 Click **Edit Links** on the Quick Launch bar or Top Links bar.
- 4 To remove a link, click the **Remove this link** button.
- 5 To change a link, click the link name to display an edit box, and then do any of the following:
  - ◆ **Change Name.** With the name selected, type another name.
  - ◆ **Change Link.** Click the **Edit a link** button, specify a link name (as desired) and an address to the link, and then click **OK**.
- 6 To move a link or heading, drag it to another location on the bar.
- 7 Click the **Save** button.

### Did You Know?

**You can customize navigation links in Site Settings.** Navigate to the site you want to change, click the Settings button (Gear icon), click Site settings, and then click the Top link bar or Quick launch link. For the Top Link bar, you can click a link to change or remove it or click New Navigation Link to create one. For the Quick Launch bar, you can click a link to change or remove it or click the links to create a new or heading or change the order.

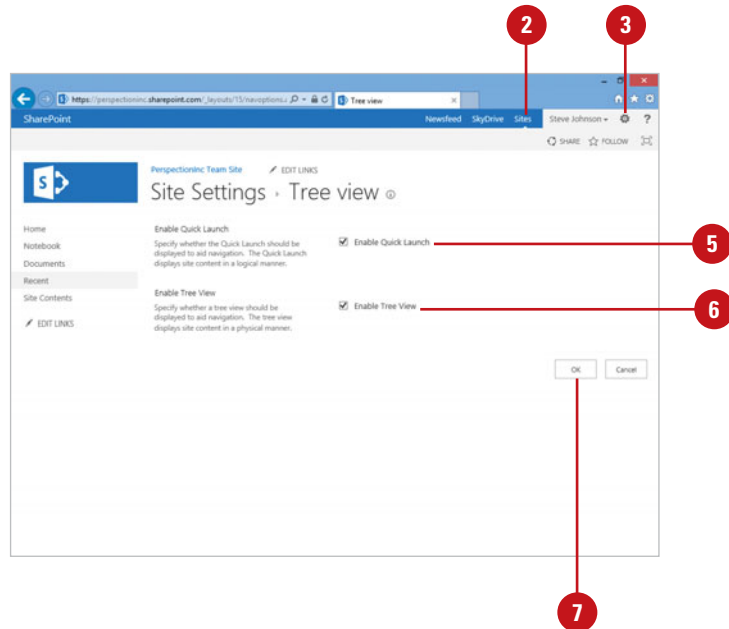


# Using Navigation Aids

## Show or Hide Quick Launch or Tree View

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to change.
- 3 Click the **Settings** button (Gear icon) on the Navigation bar, and then click **Site settings**.
- 4 Under Site Administration, click the **Tree view** link.
- 5 To show or hide the Quick Launch bar, select or clear the **Enable Tree View** check box.
- 6 To show or hide Tree view, select or clear the **Enable Tree View** check box.
- 7 Click **OK**.

When you create a site, the Top Links bar and Quick Launch bar appear by default. The Top Link bar inherits links from the parent site, if available, so it's required. The Quick Launch bar is not, so you have the option to show or hide it. In addition to the standard navigation aids, you also have the option to use **Tree view**, which provides a hierarchical content-based view of your site. Tree view works like the Folders list in File Explorer (Windows) or Finder (Mac). Tree view appears under the Quick Launch bar on the left side of the site. You can show or hide the Quick Launch bar and Tree view in Site Settings.

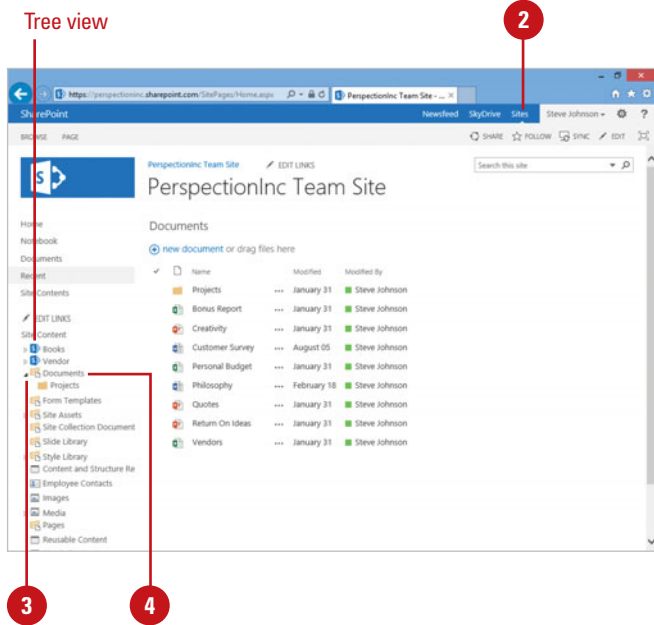


## Use Tree View to Access Site Content

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site with the Tree view you want to view.
- 3 In Tree view (under the Quick Launch bar), click the **Expand** icon (White arrow) or **Collapse** icon (Black arrow) to show or hide an element or folder.

**TROUBLE?** If Tree view is not available, you need to enable it for the site. See the previous page.

- 4 Click a link to open the element.





## Refine and Preview the Search Results

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to search.
- 3 Click in the Search box, enter search keywords, and then click the **Search** button (Magnifying Glass icon) or press Enter.

The search results appear.

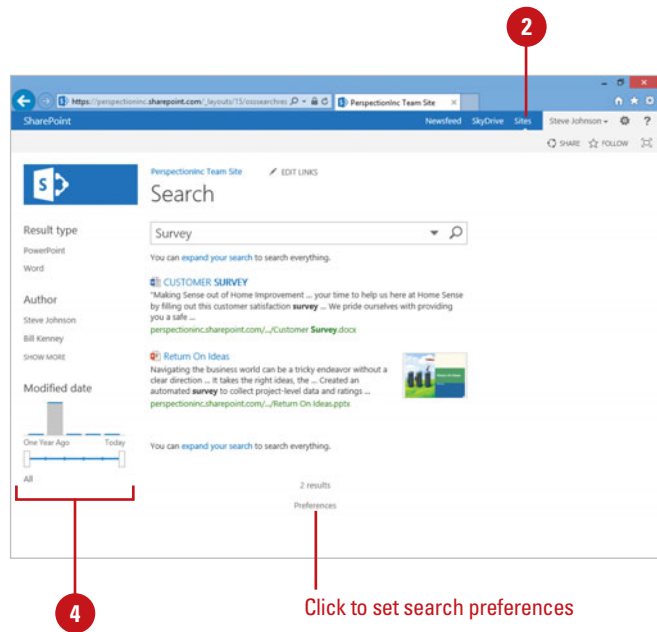
- 4 Use any of the following refiners in the left side of the site:

- ◆ **Results type.** Click to display results by type.
- ◆ **Author.** Click to display results by author. Click **Show More** to add an author.
- ◆ **Modified date.** Drag a slider to modify date range.

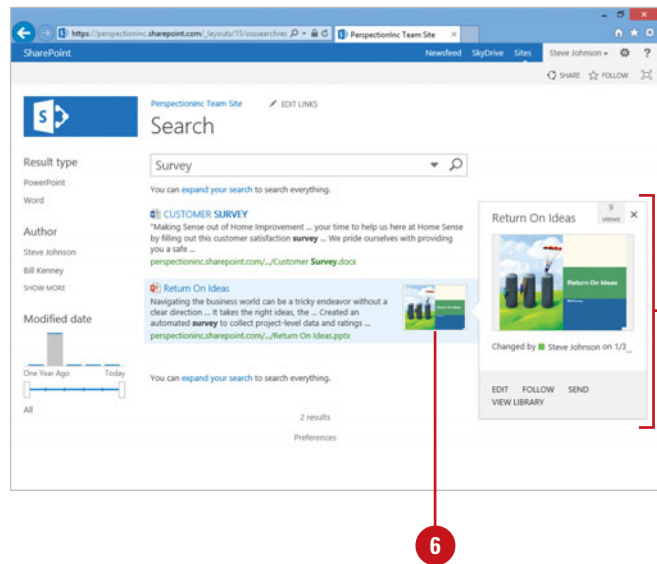
- 5 To preview a search item on a callout window, point to it, and use the available navigation or controls to view a document or play a video.

- 6 To perform other actions, use any of the following options on the callout window:

- ◆ **Edit.** Click to edit the item. For Office documents, an Office Web App opens, where you can edit the document.
- ◆ **Follow.** Click to follow the item in Newsfeed.
- ◆ **Send.** Click to create an email message in your default email program with a link to the item.
- ◆ **View Library.** Click to view the library where the item is stored.



Click to set search preferences



# Opening or Adding Site Pages

## View and Open a Site Page

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to open a page.
- 3 Click the **Page** tab.
- 4 Click the **View All Pages** button.
  - ◆ You can also click **Site Contents** on the Quick Launch bar, and then click the **Site Pages** tile.

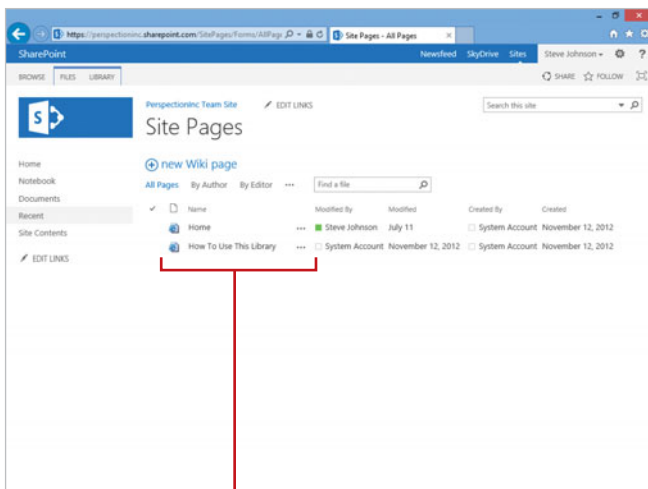
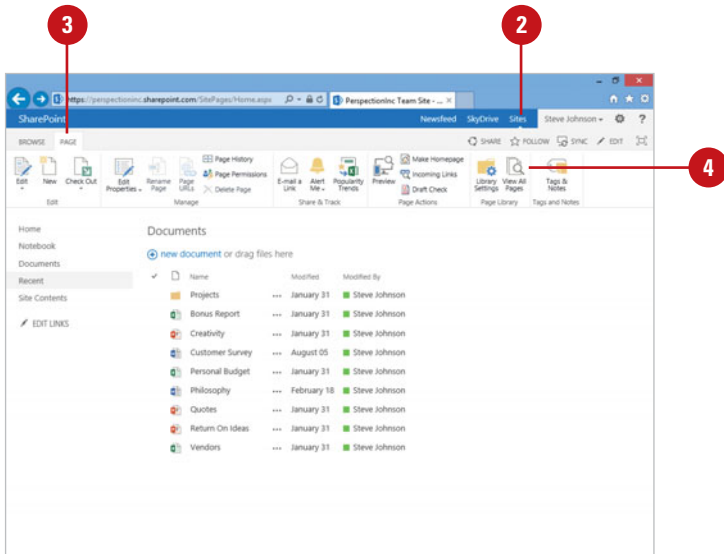
The Site Pages page opens, displaying all the site pages.

- 5 Click the page link to open it.
  - ◆ You can also click the **More Options** button (...) next to the page to display additional options.

### Did You Know?

*You can add a site page to the **Top Link** or **Quick Launch bar** for easy access.* Navigate to the site page, click the Edit Link button, drag the page item or header to the Top Link or Quick Launch bar, and then click Save.

Each site comes with one or more pages, such as the Home page. You can view existing site pages or add new ones. You can view and open site pages from the Site Pages page, which you can access from the Page tab or Site Contents. If you need a custom page, you can create your own. When you create a site page, a new blank page appears with a frame to add content. In the frame, you can create a text layout and then add and format text and insert elements, such as a table, picture, video and audio, links, App or Web parts, and embed code.



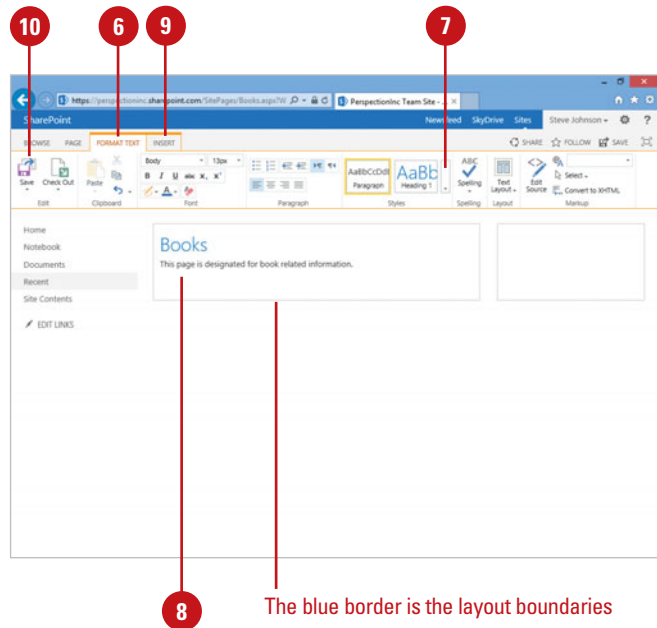
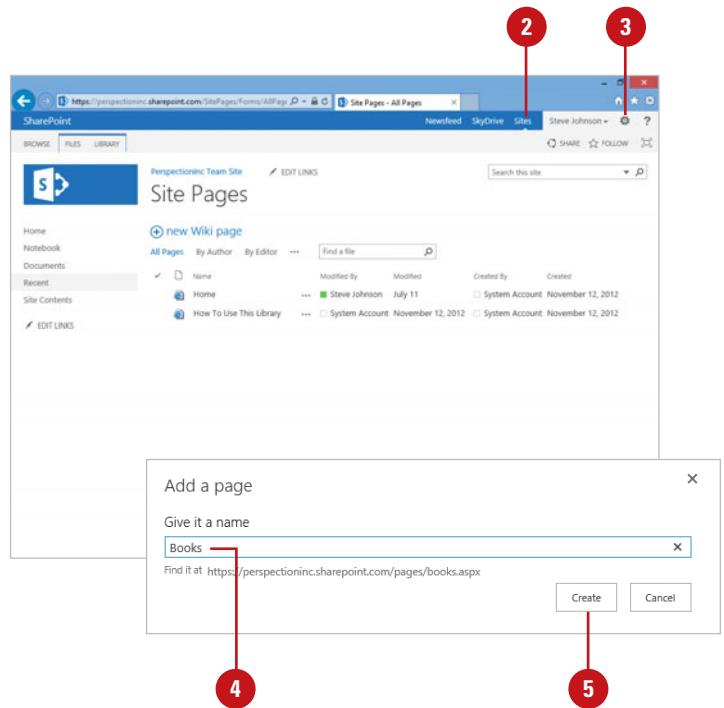


## Add a Site Page

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site where you want to add a page.
- 3 Click the **Settings** button (Gear icon) on the Navigation bar, and then click **Add a page**.
  - ◆ You can also click **Site Contents** on the Quick Launch bar, click the **Site Pages** tile, and then click **new Wiki page**.
- 4 Enter a page name.

The direct address to the page appears below the name box.
- 5 Click **Create**.

A new page appears with a blank area to create a layout and add content.
- 6 Click the **Format Text** tab.
- 7 Click the **Text Layout** button, and then click a layout option.
- 8 Add text to the layout, and then use options (Font, Paragraph, and Styles) on the Format Text tab to format the text.
- 9 Click the **Insert** tab, and then use buttons to insert a table, picture, video and audio, links, app or web parts, or embed code.
  - ◆ If a tab appears, you can use it to modify the inserted element.
- 10 When you're done, click the **Save** button on the Navigation bar or Format Text tab.



# Working with Site Pages

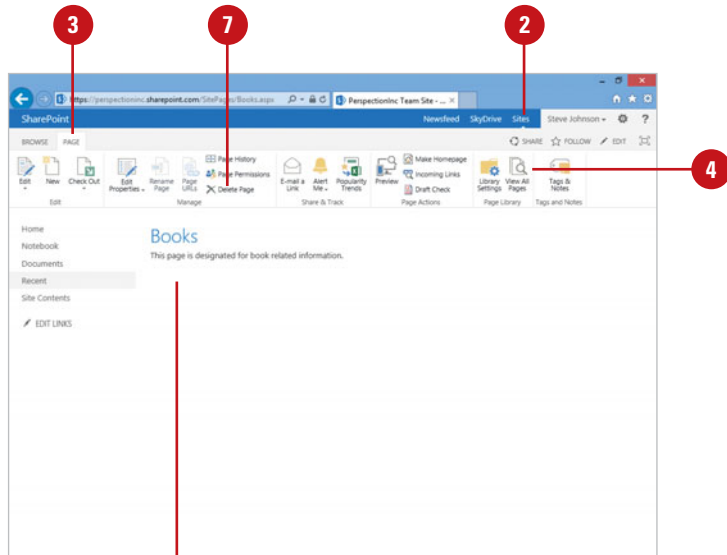
## Delete a Site Page

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to open a page.
- 3 Click the **Page** tab.
- 4 Click the **View All Pages** button.  
The Site Pages page opens, displaying all the site pages.  
**TIMESAVER** Select the page file, click the **Files** tab, and then click the **Delete Document** button.
- 5 Click the page link to open it.
- 6 Click the **Page** tab.
- 7 Click the **Delete Page** button.
- 8 Click **OK** to confirm the deletion.

### Did You Know?

**You can rename a site page.** Navigate to the site page, click the **Page** tab, click the **Rename Page** button, enter a new page name, and then **Save now**.

After you open an existing page or create a new one, you can customize it the way you want. You can add and format content and work with pages using tabs on the Ribbon. With the **Page** tab, you can edit, manage, and share & track pages as well as create tags and notes you can follow. When you edit a page, you can use the **Format Text** tab to format text just like you would in Microsoft Word, and the **Insert** tab to add elements, such as a table, picture, video and audio, links, App or Web part, and embed code. When you add an element, additional tabs may appear to customize it.



Page to be deleted

### For Your Information

#### Resetting a Page to the Site Definition Version

If you want to remove all customizations from a page, such as changes to Web Part zones or text added to the page, you can use the **Reset to site definition** link in **Site Settings**, which you can access from the **Settings** button (Gear icon) on the Navigation bar. You can select an option to reset a specific page or all the pages in the site.

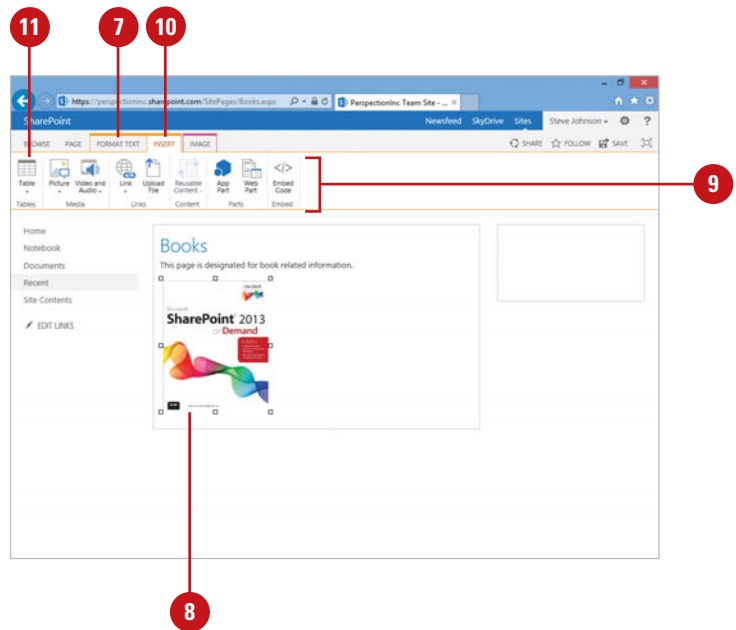
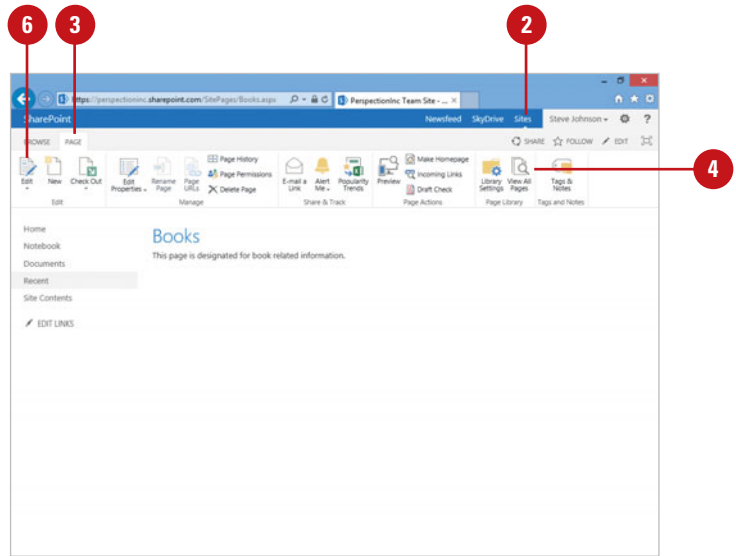
## Edit an Existing Site Page

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site where you want to add a page.
- 3 Click the **Page** tab.
- 4 Click the **View All Pages** button.

The Site Pages page opens, displaying all the site pages.

**TIMESAVER** Select the page file, click the **Files** tab, and then click the **Edit** button.

- 5 Click the page link to open it.
- 6 Click the **Edit** button on the Navigation bar or Page tab.
  - ◆ You can also click **Settings** button (Gear icon), and then click **Edit page**.
- 7 Click the **Format Text** tab.
- 8 Select the element you want to modify.
  - ◆ You can use the **Select** button on the Format Text tab to select elements.
- 9 Use formatting options (Font, Paragraph, and Styles) on the Format Text tab to format the text.
- 10 Use buttons on the Insert tab to insert a table, picture, video and audio, links, app or web parts, or embed code.
  - ◆ If a tab appears, you can use it to modify the inserted element.
- 11 When you're done, click the **Save** button on the Navigation bar or Format Text tab.

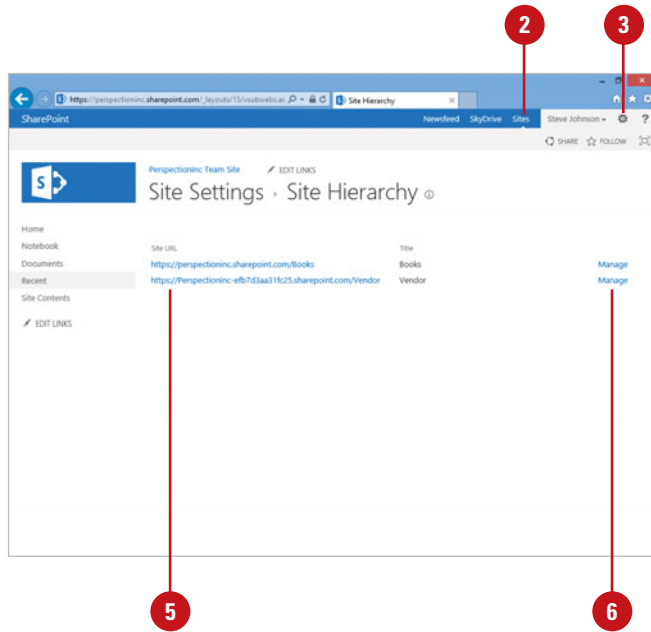


# Viewing a Site Hierarchy

## View a Site Collection Hierarchy

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the top level site you want to view in a hierarchy form.
- 3 Click the **Settings** button (Gear icon), and then click **Site settings**.
- 4 Under Site Collection Administration, click the **Site hierarchy** link.
- 5 To access the site, click the site URL link.
- 6 To change site specific settings, click the **Manage** link for the site.

As you work with a site collection (top level) that contains other sites, it can sometime be hard to keep the hierarchy of all the subsites straight in your mind. You can use the Site hierarchy link in Site Settings to get a complete list of all the sites in a site collection. From the complete site list, you can view and access a URL to the site and manage site settings for a specific site.



# Managing Site Features

## Activate or Deactivate Site Features

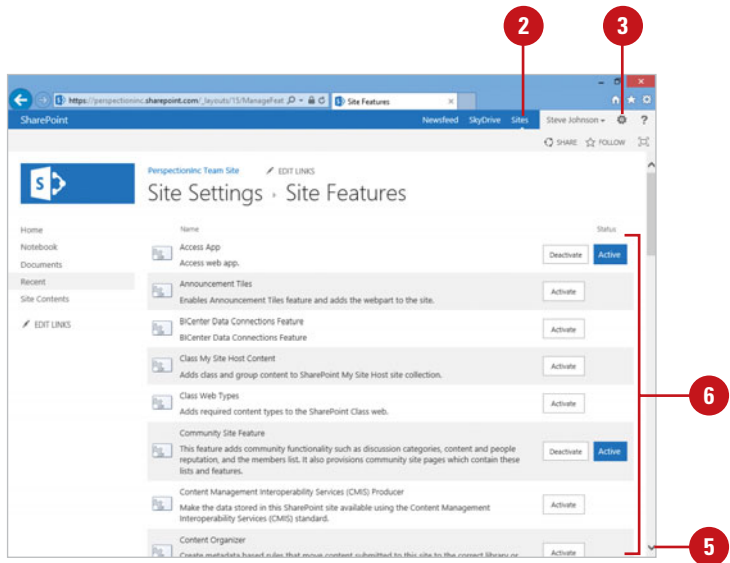
- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to activate or deactivate a site feature.
- 3 Click the **Settings** button (Gear icon), and then click **Site settings**.
- 4 Under Site Actions, click the **Manage site features** link.
  - ◆ **For top site level.** Under Site Collection Administration, click **Site collection features** link.
- 5 View and scroll the list of available features for the site and its status.
- 6 Click **Activate** or **Deactivate** to enable or disable a site feature.

**IMPORTANT** *If an alert message appears, you might not have permission or need to activate another feature.*

### See Also

See “Exploring Site Features” on page 68 for a list and description of the site features.

Each site comes with a set of features that you can enable (activate) or disable (deactivate) based on your needs. Some features come activated when you create a site while other features are deactivated. For example, features—such as Getting Started, Following Content, and Mobile Browser View—come activate, while other features—such as Announcement Tiles, Community Site Features, or SharePoint Server Publishing to create web sites. Some site features need to be activated at the top-site collection level or require other features to be activated using the Site collection features link (under Site Collection Administration in Site Settings) before you can complete the process. An alert message appears to let you know.



# Exploring Site Features

Each site comes with a set of features that you can enable (activate) or disable (deactivate) based on your needs. Some features come activated when you create a site while other features are deactivated. You can activate or deactivate site features for a site by

using the Manage site features link in Site Settings. However, some features require other ones to be activated using the Site collection features link. Here is a list of site features available in SharePoint. Site features vary depending on your SharePoint edition.

Site Features	
Site features	Description
Access App	Adds the Access web application
Announcement Tiles	Enables the use of tiles for announcements and adds the web part to the site
BICenter Data Connections Features	Adds connections to BICenter data
Class My Site Host Content	Adds class and group content to SharePoint My Site Host site collection
Class Web Types	Adds required content types to the SharePoint class web
Community Site Features	Adds community functionality such as discussion categories, content and people reputation, and the members list. It also provisions community site pages which contain these lists and features.
Content Management Interoperability Services (CMIS) Producer	Makes the data stored in this SharePoint collection available to application via the Content Management Interoperability Services (CMIS) interfaces using SOAP and AtomPub.
Content Organizer	Creates metadata based rules that move content submitted to this site to the correct library or folder
Duet Enterprise - SAP Workflow	Enables the site to host SAP workflow task types
Duet Enterprise Reporting	Retrieves data from the SAP System and generates reports
Duet Enterprise Site Branding	Enables the Duet Enterprise logo to appear as the site logo
External System Events	Enables Alerts and Event Receivers on the External List and External Content Types
Following Content	Enables users to follow documents or sites
Getting Started	Creates an instance of the Promoted Links list with item about how to get started with your SharePoint site
Getting Started with Project Web App	Creates an instance of the Promoted Links list with item about how to get started with your Project Web App site
Group Work List	Provides Calendars with functionality for team and resource scheduling
Hold	Used to track external actions like litigations, investigations, or audits that require you to suspend the disposition of documents

## Site Features *(continued)*

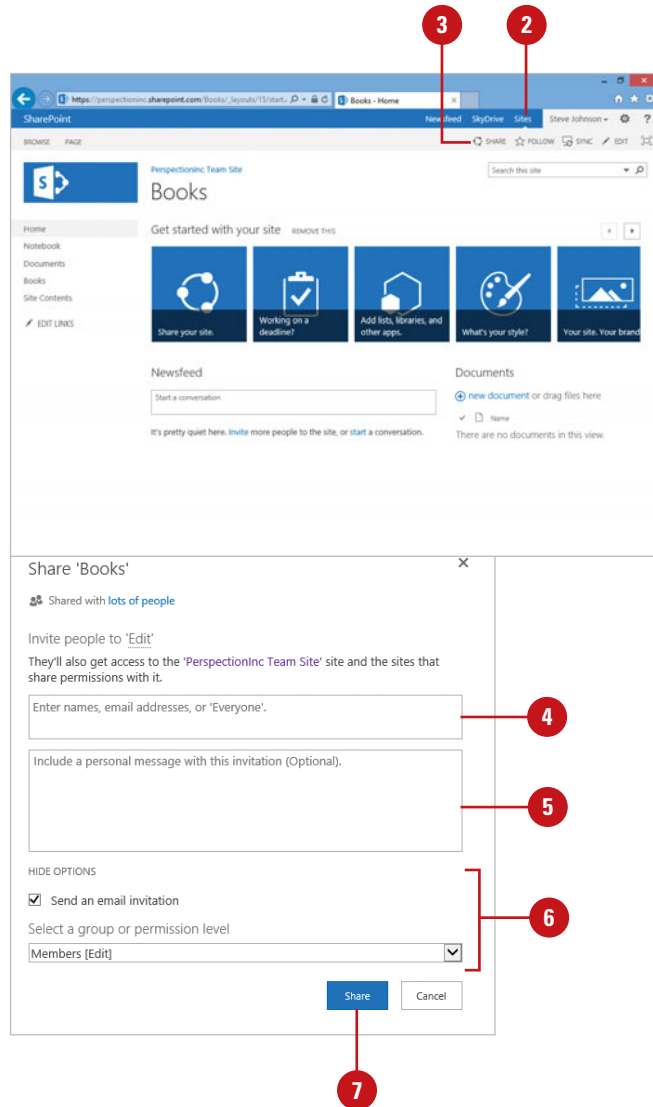
Site features	Description
Metadata Navigation and Filtering	Provides each list in the site with a settings page for configuring that list to use metadata tree view hierarchies and filter controls
Minimal Download Strategy	Enables a faster and more fluid web navigation for pages and sites
Mobile Browser View	Enables a mobile view for document libraries and other lists in a Team site for smartphone browsers
Offline Synchronization for External Lists	Enables offline synchronization for external lists with Outlook and SharePoint Workspace
PerformancePoint Services Site Features	Enables PerformancePoint Services list and document library templates
Project Functionality	Adds project management functionality to a site, which includes tasks, a calendar, and web parts on the home page of the site
Project Proposal Workflow	Provides a review workflow for managing project proposals
Project Web App Connectivity	Provides the lists required within a Project Site for integration with Project Web App including issues, risks, and deliverables
Project Sites Collaboration Lists	Provides the list for integration with Microsoft Project Server
Push Notifications	Enables functionality for mobile devices to get event notifications
SAP Workflow Web Parts	Enables the usage of SAP Workflow Web Parts
Search Config Data Content Types	Installs content types designed to manage search configuration
Search Config Data Site Columns	Installs columns designed to manage information about search configurations
Search Config List Instance Feature	Provides a list to enable the import and export of search configurations
Search Config Template Feature	Provides a template for the Search Config List to enable the import and export of search configurations
SharePoint Server Enterprise Site features	Enables features such as Visio Services, Access Services, Excel Services Application
SharePoint Server Publishing	Provides a Web page library to create and publish Web pages
SharePoint Server Standard Site features	Enables features such as user profiles and search
Site Feed	Enables the use of site feeds
Site Mailbox	Enables the Site Mailbox app to connect your site to an Exchange mailbox.
Site Notebook	Creates a Microsoft OneNote notebook in the Shared Documents library and places a link to it on the Quick Launch bar
Team Collaboration Lists	Provides team collaboration with lists, document libraries, and issues
Wiki Page Home Page	Creates a wiki page and sets it as your site home page
Workflow Task Content Type	Adds the SharePoint 2013 Task content type to the site
Workflows can use app permissions	Enables workflow to read from and to write to all items from the site

# Sharing a Site

## Share a Site

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to share.
- 3 Click the **Share** button on the Navigation bar.
- 4 Enter names, email addresses, or 'Everyone', and then select them from the list, as available.
- 5 Enter an optional message to include with the email invitation.
- 6 To set other options, click the **Show Options** link, and then specify any of the following:
  - ◆ **Send an email invitation.** Select or clear the check box to include or not the personal message with the invitation.
  - ◆ **Select a group or permission level.** Select a group or permission level, including Members [Edit], Owners [Full Control], or Visitor [Read].
- 7 Click **Share** to send the invitation.  
In the recipients email program, a message appears with a link to go to the site.

With SharePoint, you can send an invitation to share a site (**New!**) with others who do or don't already have access to it. You can specify a name from your members or enter any email address, and include a personal message with your invitation. That's all you need to do, unless you want to specify other options to send an email invitation or set a group or permission level (**New!**) including Members [Edit], Owners [Full Control], or Visitor [Read]. Whenever a site document gets updated, you can receive alerts in your Newsfeed. You can also use your mobile device to share a site document or folder in a library.



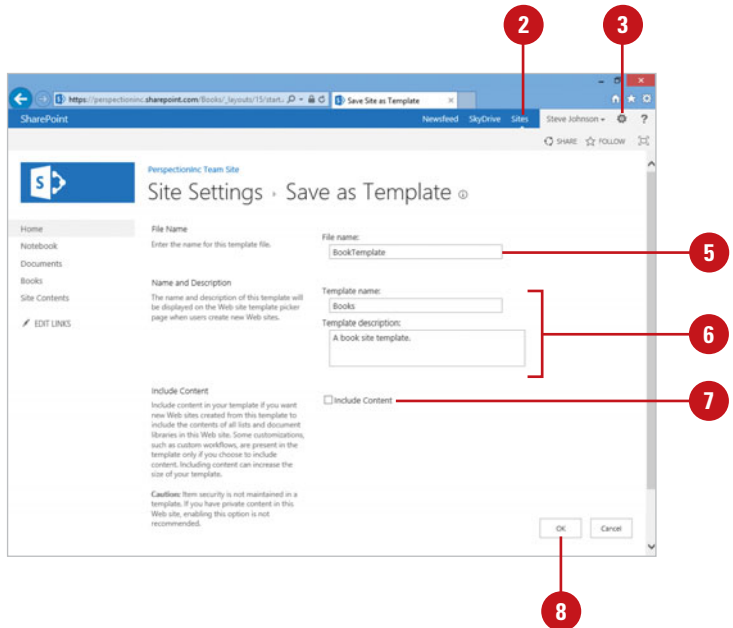


# Saving a Site as a Template

## Save a Site as a Template

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to save as a template.
- 3 Click the **Settings** button (Gear icon), and then click **Site settings**.
- 4 Under Site Actions, click the **Save site as template** link.
- 5 Enter a file name for the template.
- 6 Enter a template name and description.
- 7 To include current site content in the template, select the **Include Content** check box.
- 8 Click **OK**.

After you create and customize a site the way you want it, you can save it as a template, so you can use it as the basis for a site in the future. When you save a site as a template, you any libraries, lists, or other parts you have included in the site are also saved in the template. If you want to include the content stored in the site within the template, you have the option to do so.



# Deleting a SharePoint Site

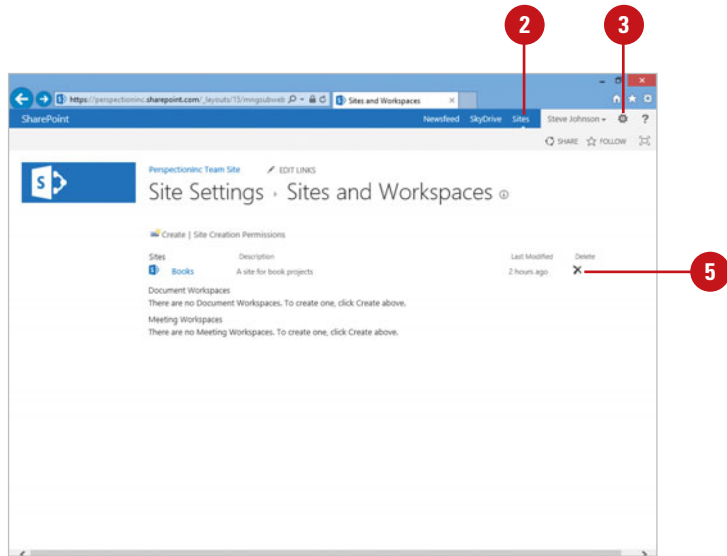
## Delete a SharePoint Site

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to delete.
- 3 Click the **Settings** button (Gear icon), and then click **Site settings**.
- 4 Under Site Administration, click the **Sites and workspaces** link.
- 5 Click the **Delete** button.

**IMPORTANT** If you don't have permission to delete the site, an alert message appears to send a request.

- 6 Click **Delete** to confirm the deletion.

If you no longer need a site and have the right permissions, you can delete it. If an option is not available, you don't have permission to perform the operation. When you delete a site, you also delete any sub-sites, content, and information associated with the site, including Site Settings, documents, libraries, and lists. If you only want to delete a sub-site, you can remove it too. If you accidentally delete a site, the site collection administrator can restore it from the site collection recycle bin.

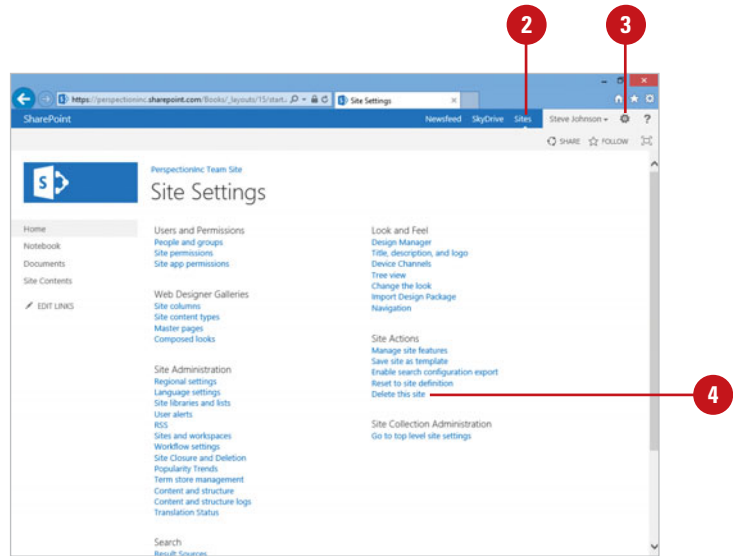


## Delete a SharePoint Subsite

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the subsite you want to delete.
- 3 Click the **Settings** button (Gear icon), and then click **Site settings**.
- 4 Under Site Actions, click the **Delete this site** link.

**IMPORTANT** *If the Delete this site option doesn't appear, you don't have permission to delete the site.*

- 5 Click **Delete** to confirm the deletion.



# Using Site Closure and Deletion Settings

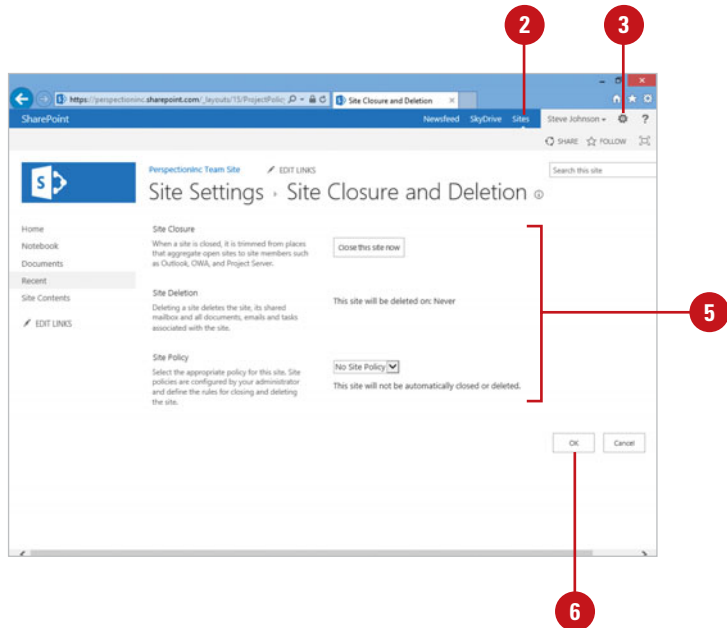
## Use Site Closure and Deletion Settings

- 1 In your web browser, open your SharePoint site.
- 2 Navigate to the site you want to delete.
- 3 Click the **Settings** button (Gear icon), and then click **Site settings**.
- 4 Under Site Administration, click the **Site Closure and Deletion** link.
- 5 Use any of the following:
  - ◆ **Site Closure.** Click the **Close this site now** button to close the site.
  - ◆ **Site Deletion.** Select the option you want for the site.
  - ◆ **Site Policy.** Select the policy you want for the site. The policies are configured by the site administrator.

**IMPORTANT** *If an option is not available, you don't have permission to perform the operation.*

- 6 Click **OK**.

In Site Settings, you can close the use of the site, delete it all together, or select site policies specified by the site administrator. When you close a site, links to access other site services, such as Outlook, Outlook Web App (OWA), and Project Server, are removed. When you delete a site, you also delete any subsites, content, and information associated with the site, including Site Settings, documents, libraries, and lists. If you accidentally delete a site, the site collection administrator can restore it from the site collection recycle bin. If an option is not available, you don't have permission to perform the operation.



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