

# Creating a Teamsite in SharePoint 2013



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# Creating a Teamsite

A teamsite is a site that includes collaborative content that is used to store team documents, plan projects and coordinate tasks.

# Create a Site Based on a Template

1. Click on the Gear Icon located at the top of the site window and select Site contents from the drop down list.



2. Or click on Site Contents located on the Quick Launch bar.

Information Services > Academic Computing Services > Web Team > SharePoint BootCamp SharePoint BootCamp - Home										
Home	Sites 🗸	Pictures 🗸	Libraries 🗸	Lists 🗸	Discussions 🗸	Recent 🗸	Site Contents			

3. Scroll to the bottom of the window and click on the new subsite link.



Modified 3 months ago Modified 3 months ago

- 4. Give your site a title.
- 5. You can add a description but this is not necessary.
- 6. Enter a URL for the site. **NOTE:** When entering the URL you only need to specify what the site name (last portion of the URL) will be. SharePoint will automatically generate the first portion of the URL. Keep the URL short do not use spaces, use hyphens instead; acronyms work best.
- 7. Under Select a template make sure that the Custom tab is selected and wcuSiteTemplate is highlighted.
- 8. Under User Permissions you can select:
  - Use same as parent site if you want the teamsite to have the same permissions as the parent.
  - Use unique permissions if you want your site to have its' own permissions. By selecting this option new groups will automatically be created for your site.
  - Note: You can change the site permission inheritance later.

- 9. Use the top link bar from the parent site? Leave the default as No. Since SharePoint 2013 is using a branded template the top link bar cannot be edited and the site will always inherit from the parent no matter if Yes or No is selected.
- 10. Click Create.

New	' Share	Point Sit	e				
Home	Sites 🗸	Pictures 🗸	Libraries 🗸	Lists 🗸	Discussions 🗸	Recent 🗸	Site Contents
Title and [	Description	Title:	est				
		Descripti This si	on: ite is for testing p	urposes.			
Web Site /	Address	URL nam https://	e: /sharepoint.wcup:	a.edu/vp/IS/ac	ad/webteam/bo/ st		
Template	Selection	Select a I <u>Collab</u> weuSi	template: <u>toration</u> <u>Enterpr</u> teTemplate	<u>ise Publishing</u>	1 <u>Custom</u>		
Permission You can giv	ns /e permission to	User Per	missions:				

You can give permission to access your new site to the same users who have access to this parent site, or you can give permission to a unique set of users.

Use same permissions as parent site

O Use unique permissions

Note: If you select <b>Use same</b> <b>permissions as parent site</b> , one set of user permissions is shared by both sites. Consequently, you cannot change user permissions on your new site unless you are an administrator of this parent site.				
Navigation Inheritance	Use the top link bar from the parent	site?		
	© Yes	No		
			Create	Cancel

11. If you selected Use Unique Permissions the following window will appear. The groups that appear in the box are the default groups of the parent site.

+ Shttps://sharepoint.w	cupa.edu/vp/IS/acad/webteam/bootcan	np/p/_layouts/15/permsetup.aspx?HideCancel=1&NextUsing: 🔎 👻 🗎 Ċ 🗙 🛛 👿 West Chester U 🛛 👿
File Edit View Favorites To	ools Help	
SharePoint		
	Permissions 📝 EDIT LINKS	
S 🕽	Desigle and C	Catilla Carrier frontheir Cite
	People and G	proups + Set Up Groups for this Site ©
Home	Visitors to this Site	
Documents	Visitors can read content in the	Create a new group     Ose an existing group
Site Contents	visitors or re-use an existing	Information Services Visitors
	SharePoint group.	
EDIT LINKS		
	Members of this Site	Create a new group     O Use an existing group
	Members can contribute content to the Web site. Create a group	
	of site members or re-use an	Information Services Members
	existing share-onit group.	
	Owners of this Site	
	Owners have <b>full control</b> over	Create a new group ose an existing group
	owners or re-use an existing	Information Services Owners
	SharePoint group.	
		OK
		<u>or</u>

- 12. To create new groups click on Create a new group. A new group is created with the team site name.
- 13. You can begin adding users to the group by typing their username into the window or searching for it in the global address list.
  - Click on the Check Name icon to verify that the name was entered correctly.
  - If you receive a no exact match was found error click on the name and resolve it by selecting the correct entry from the drop down list.

• If a no results found error appears or there is no drop down list to select from, enter the name using the following format: **passhe\75username**; (make sure you enter a semicolon after the username) then hit enter. The name will resolve.

lome	Visitors to this Site Visitors can <b>read</b> content in the	<ul> <li>Create a new group</li> </ul>	OUse an existing group	
lite Contents	Web site. Create a group of visitors or re-use an existing SharePoint group	Permissions Visitors		
	Truitt, Rob Red Truitt, More Nam Members of this Site Members can contribute content to the Web site. Create a group	Rebert W Rebert W tes Create a new group	item(s) that did not resolve for mo © Use an existing group	Check Name and Browse Address Book icons
	of site members or re-use an existing SharePoint group. Owners of this Site Owners have <b>full control</b> over the Web site. Create a group of owners or re-use an existing	Create a new group Information Services Owners	Output See an existing group	

- The name is resolved when it is underlined.
- You can also search for a name by browsing the address book.

٠	You can add	more than	one name l	oy inserti	ng a semio	colon	between	each	name	<u>)</u> .
										-

	Permissions 🖌 EDIT LINKS				
~	People and C	Groups + Set Up (	Groups for this	Site 🛛	
nents ontents	Visitors to this Site Visitors can <b>read</b> content in the Web site. Create a group of visitors or re-use an existing	Create a new group     Permissions Visitors	Select People and Groups		
IT LINKS	SharePoint group.	Truitt, Robert W;	Find smith		٩
		No exact match was found. Click the it	Display Name Sean S Smith	Title	Department
			Smith, Alan E. Smith, Aneesah S.		PHILOSOPHY LGBTQA SERVICES
	Members of this Site Members can <b>contribute</b> content to the Web site. Create a group of site members or re-use an cristie ChecePoicte acress	Create a new group	Smith, Arthur Smith, Carol A Smith, Christine	Retired/Emeritus	GEOLOGY & ASTRONOMY LITERACY COMMUNICATION SCIENCES & DISORDE
	Owners of this Site	Create a new group	Smith, Reny A. Smith, Paul Smith, Ron J. Smith, Sarah	Retired/Emeritus	KINESIOLOGY GEOGRAPHY & PLANNING ADMISSIONS
	the Web site. Create a group of owners or re-use an existing SharePoint group.	Information Services Owners	Smith, Stephanie J (Provost Office) Smith, William S.		PROVOST OFFICE CUSTODIAL SVCS

- 14. Repeat these steps for the Members group and the Owners group.
- 15. Click Ok when finished.

# Converting the New Site to the Branded Template

- 1. After the site has been created you need to convert the page to the branded master template.
- 2. Change the URL on the new page by removing the highlighted portion of the URL.



#### 3. Type in the following text: \_layouts/15/ChangeSiteMasterPage.aspx



- 4. Click the radio buttons next to **Inherit site master page from parent of this site** and **Inherit system master page from parent of this site.**
- 5. Click Ok.



6. Your new team site page should look like this.

-								
🔶 💮 🚻 https://sharepoint.wcu	upa.edu/vp/IS/acad/webteam/bootcamp/st2/SiteP	ages/Home.aspx	×5≞ ≁ Q	W Search WCU	W People and Gro W Home - Hu	man 🔣 Resources: Wor 🚺	West Chester U	W Site Test - H × 🕠 🕅
File Edit View Favorites Too	ls Help				× 🍖 Conv	ert 🔻 🛃 Select		
s > Shar	ePoint						? Search this	s site Q
PRESIDENT	ACADEMIC AFFAIRS	ADMIN & FINANCE	ADVAN	ICEMENT	EXTERNAL OPERATIONS	INFORMATION SE	RVICES	STUDENT AFFAIRS
			_	_			_	_
Information Services > Acad	emic Computing Services > Web Team > SharePo	nt BootCamp > Site Test						
Site Test - F	Home							
Home Documents	Site Contents							
								BROWSE PAGE
Documents								
new document								
✓ □ <u>Name</u> <u>Modified</u>	Modified By							
There are no document	ts in this view.							

# Permissions

A permission level is a combination of SharePoint permissions. Permission levels specify which permissions users have for a site or list, and therefore whether people can view, change, or manage a site. By default, SharePoint pre-defines some permission levels. You have the option to give your teamsite unique permissions, i.e. different from the parent site. You can create new SharePoint groups or re-use existing SharePoint groups. *Note:* Best Practice for granting permission to users is to add them to a SharePoint group, not to give the user access directly to a site. It is much easier to maintain groups across multiple sites than to maintain individual users across multiple sites.

#### **Default Permission Levels:**

**Read:** Can view pages and items in existing lists and document libraries. Can download documents. This permission level is usually assigned to the Visitors group.

**View Only:** View pages, items, and documents. Any document that has a server-side file handler can be viewed in the browser but not downloaded. This permission level is usually assigned to the Visitors group.

**Contribute:** View, add, update, and delete list items and documents. This permission level is usually assigned to the Member Group.

**Full Control:** Contains all available SharePoint permissions. By default, this permission level is assigned to the Owners group.

#### **Accessing the Permssions Page**

You can access the permission page from the Site Settings Page:

1. Click on the Settings Gear icon at the top of the page and select Site Settings from the drop down list.



- 2. Under the Users and Permissions group select Site Permissions.
- 3. The yellow bar that appears under the Quick Launch bar indicates if the site inherits permissions from the parent site or has unique permissions.

Permissions: Web Parts Libraries V Lists V Discussions V Recent V Site Contents			Manage Stop Parent Pe	p Inheriting rmissions P ance	Grant Grant Grant	reate roup Check Permissions Check
				E	BROWSE	PERMISSIONS
This Web site inherits permissions from its parent. <u>(SharePoint BootCamp)</u>						
Name Name	Type	Permission Levels				
Boot Camp Members	SharePoint Group	Contribute				
Boot Camp Owners	SharePoint Group	Full Control				
Records Center Web Service Submitters for basic	SharePoint Group	Records Center Web Service Submitters				
Records Center Web Service Submitters for bootcamp	SharePoint Group	Records Center Web Service Submitters				
Records Center Web Service Submitters for webparts	SharePoint Group	Records Center Web Service Submitters				
Web Team Visitors	SharePoint Group	Read				

- 4. To stop inheriting permissions and create unique permissions click on Stop Inheriting Permissions on the ribbon.
- 5. A warning window appears indicating you are about to create unique permissions. Click Ok.



- 6. A Set Up Groups for this site window appears.
- 7. You can create new groups here or select a group from the drop down menu.
- 8. Click on Create a new group and SharePoint automatically creates the group for you.
- 9. You can begin adding names to the groups in the same way as shown on pages 3 and 4.
- 10. Click Ok when finished.

Set Up Group	os for this Site
Libraries 🗸 Lists 🗸	Discussions 🗸 Recent 🗸 Site Contents
Visitors to this Site Visitors can <b>read</b> content in the Web site. Create a group of visitors or re-use an existing SharePoint group.	Create a new group     O Use an existing group     Web Parts Visitors
Members of this Site Members can <b>contribute</b> content to the Web site. Create a group of site members or re- use an existing SharePoint group.	Create a new group
Owners of this Site Owners have <b>full control</b> over the Web site. Create a group of owners or re-use an existing SharePoint group.	Create a new group  Use an existing group  Information Services Owners

- 11. Click on the Settings Gear icon and select Site Settings from the drop down menu.
- 12. Under the Users and Permissions group select Site Permissions.
- 13. The yellow information bar should now read: This web site has unique permissions. You can now edit the permissions.

Infor	nation Services > Academic Computing Services > Web Team > SharePoint BootCamp > Web Parts			_						
Pe	ermissions: Web Parts			Delete unique permissions	Grant Permissions	Create Group	Edit User Permissions	Remove User Permissions	Check Permissions	Permission Levels D Access Request Settings
Libra	ries 🗸 🛛 Lists 🗸 🛛 Discussions 🗸 🛛 Recent 🗸 🛛 Site Contents			Inheritance	Grant		Mo	dify	Check	Manage
									BRO	WSE PERMISSIONS
	This web site has unique permissions.									
	Name	Туре	Permission Levels							
1	Boot Camp Members	SharePoint Group	Contribute							
	Boot Camp Owners	SharePoint Group	Full Control							
	Records Center Web Service Submitters for basic	SharePoint Group	Records Center Web Service Submitte	rs						
	Records Center Web Service Submitters for bootcamp	SharePoint Group	Records Center Web Service Submitte	rs						
	Records Center Web Service Submitters for webparts	SharePoint Group	Records Center Web Service Submitte	rs						
	Web Parts Members	SharePoint Group	Edit							
	Web Parts Owners	SharePoint Group	Full Control							
	Web Parts Visitors	SharePoint Group	Read							
	Web Team Visitors	SharePoint Group	Read							

- 14. To remove a SharePoint group click in the box next to the group name and click on Remove User Permissions on the ribbon.
  - Note: make sure you do not remove your permissions as the owner of the site.
- 15. To grant permissions click Grant Permissions on the ribbon and add a group name or username. Remember it is better to add users to a group than to give them direct access to a site.
- 16. Click on the Show Options link to expand the options.

		×
	Invite people to 'Edit'	
	Enter names, email addresses, or 'Everyone'.	
	Include a personal message with this invitation (Optional).	
(	SHOW OPTIONS	
	Share	Cancel

17. To grant a SharePoint group permission to your site type the name of the group in the enter names window. As soon as you begin typing, group names will start to populate.18. Select the group name by clicking on it.

Invite people to 'Edit'		
Infor		
Information Services Members	Optional).	
Information Services Owners	#	
Information Services Visitors		
Information Technology Accessibility Memb		
	•	
HIDE OPTIONS		
Send an email invitation		
Select a group or permission level		
Web Parts Members [Edit]		-
		Constant

- 19. To assign a permission level to the group click on the drop down arrow under Select a group or permission level.
- 20. Send an email invitation is checked by default. This option sends an automated email with a link to the SharePoint site to the individuals that you granted permission to after you click on Share. **Note:** If you are granting the WCU All Employees group access to your site then you will need to uncheck this box before you click on Share. You do not have permission to send emails to this group.
- 21. When you are finished granting permissions click on Share.

×

	×
nvite people to 'Edit'	
inter names, email addresses, or 'Everyone'.	
include a personal message with this invitation (Optional).	
IDE OPTIONS	
2 Send an email invitation	
erect a group of permission rever	
Web Parts Members [Edit] Sout Camp Members (Contribute)	
3oot Camp Owners [Full Control]	
nformation Services Owners [No Access] Decords Center Web Service Submitters for basic Records Center Web Service Submitters]	
Records Center Web Service Submitters for boacamp [Records Center Web Service Submitters]	
Records Center Web Service Submitters for webparts [Records Center Web Service Submitters]	
Web Parts Members [Edit]	
Web Parts Visitors [Read]	
Neb Team Visitors [Read]	
Ten oo ten Design	
Design Fat	

# Adding Users to a SharePoint Permission Group

You can add users to a SharePoint group 2 ways: from the Site Settings page or from the People and Groups page (go to page 11 for the People and Groups page instructions).

- 1. Click on the Settings Gear icon and select Site Settings.
- 2. Under the Users and Permissions group select Site Permissions.
- 3. Click on the group that you would like to add a user to.
- 4. Click on New and click on Add users to this group.



5. In the Add people to the Group box type in the person's username. Names will begin to populate similar to what you are entering. Click on the corresponding name from the drop down list.

aver		
averty, Darlene	Optional).	
iowing 1 result		
E OPTIONS		

6. If a no results found error appears or the name becomes underlined in red enter the name using the following format: passhe\75username; (make sure you enter a semicolon after the username) then hit enter. The name will resolve.

- 7. Click Show Options if you would like to send an automated email to the user; uncheck if you do not.
- 8. Click Share.

			×
A	Add people to the Web Parts Members group		
Ŗ	passhe\75blinton		
٢	No results found		
	, optionally.		
Н			
V	Send an email invitation		
		Share	Cancel
			curreer
	Add people to the Web Parts Members group		(
	Add people to the Web Parts Members group		
	Add people to the Web Parts Members group	>	<
	Add people to the Web Parts Members group           Linton, Beverly J. x           Include a personal message with this invitation (Optional).	>	<
	Add people to the Web Parts Members group          Linton. Beverly J, x         Include a personal message with this invitation (Optional).		content
	Add people to the Web Parts Members group           Linton. Beverly J. x           Include a personal message with this invitation (Optional).		<
	Add people to the Web Parts Members group          Linton. Beverly J. x         Include a personal message with this invitation (Optional).         HIDE OPTIONS		<pre></pre>
	Add people to the Web Parts Members group          Linton. Beverly J. x         Include a personal message with this invitation (Optional).         HIDE OPTIONS         Image: Send an email invitation		
	Add people to the Web Parts Members group          Linton. Beverly J. x         Include a personal message with this invitation (Optional).         HIDE OPTIONS         I Send an email invitation		<

- 9. The name will appear in the group list.
- 10. To remove an individual or individuals from a group check the box next to their names click on the Actions drop down and Select Remove Users from Group.



- 11. You can send an email to the group from this drop down as well.
- 12. Select all the users in the list.
- 13. Click on the Actions drop down and select E-Mail Users.

Groups	~	Libraries 🗸	Lists 🗸	Discussions 🗸	Recent 🗸	Site Contents
New 🔹	<u>Actic</u>	ons • <u>Settings</u>	•			
		<u>E-Mail Users</u> Send an e-mail to	selected user	<u>'S.</u>	About me	Title
V V		Call/Message Sel Call the selected	ected Users users.	E-Mail Users		
		Remove Users fro Remove selected	om Group users from thi	is SharePoint group.		

# **Editing User Permissions**

- 1. Select a group or user from the Site Permissions page.
- 2. Click on Edit User Permissions from the ribbon.

Permissions: Site Test			Delete unique permissions	Grant Permissions Grou	Edit User Permission	Remove User Permissions	Check Permissions	Permission Levels
Home Documents Site Contents			Inheritance	Grant	$\sim$	odify	Check	Manage
							BRC	WSE PERMISSIONS
This web site has unique permissions.								
I I Name	Туре	Permission Levels						
Boot Camp Members	SharePoint Group	Contribute						
Boot Camp Owners	SharePoint Group	Full Control						
Records Center Web Service Submitters for basic	SharePoint Group	Records Center Web Service Submitte	ers					
Records Center Web Service Submitters for bootcamp	SharePoint Group	Records Center Web Service Submitte	ers					
Records Center Web Service Submitters for webparts	SharePoint Group	Records Center Web Service Submitte	ers					
Web Team Visitors	SharePoint Group	Read						

#### 3. Select the permission level from the list.

4. Click Ok.



#### Editing the People and Groups Page Drop Down List

- 1. Click on the Settings Gear icon and select Site Settings from the drop down list.
- 2. Under Users and Permissions select People and Groups.

OK Cancel

- 3. The default group for the site will appear on the page.
- 4. Click on the Groups drop down and select More.



5. Click on the Settings drop down and click Edit Group Quick Launch.

People	and G	iroups:	All Grou	ups				
Groups 🗸	Home	Sites 🗸	Pictures 🗸	Libraries 🗸	Lists 🗸	Discussions 🗸	Recent 🗸	People and Groups
<u>New</u> • <u>Setti</u>	ngs 🔻							
Group Academic ( Members	Edit Group Choose wh Launch of t	Quick Launch iich SharePoint : the People and	groups appear in ti Groups page.	<u>he Quick</u> pr	tribute permis	sions to the SharePoi	nt site: Academie	c Computing Services
Academic Compu Owners	uting Service	is 🔛	Use this group t	o give people run	Quick Launch	ssions to the SharePoi	int site: Academi	c Computing Services

6. This window shows the list of groups that currently appear in the Quick Launch. Use the scroll bar to see the complete list.

Home	Sites 🗸	Pictures 🗸	Libraries 🗸	Lists 🗸	Discussions 🗸
Groups Specify whi groups to li the People for this Wel	ch SharePoint ist in the left pa and Groups pag b site.	Viewers: ne of <u>Informa</u> ge Informa	Information Servi tion Services Mem tion Services Visite	ices Owners; ibers;	

- 7. To remove a group highlight the group name and click the backspace button on the keyboard.
- 8. To add a group to the list type the name of the group. **Note:** group names are separated by a semicolon. Click on the check name icon to verify the name. If you are not sure of the exact spelling of the group name click on the browse icon and search for the name.
- 9. Select the group from the list, click Add.
- 10. You can add more than one group at a time.
- 11. Click Ok.

ecords Center Web Service Submitters for techfee	Records Center Web Service Submitters for techfee	
ecords Center Web Service Submitters for telephone	Records Center Web Service Submitters for telephone	
ecords Center Web Service Submitters for tf-rfp	Records Center Web Service Submitters for tf-rfp	
ecords Center Web Service Submitters for wcuhome	Records Center Web Service Submitters for wcuhome	
ecords Center Web Service Submitters for webparts	Records Center Web Service Submitters for webparts	
ecords Center Web Service Submitters for webteam	Records Center Web Service Submitters for webteam	
ecords Center Web Service Submitters for wfs	Records Center Web Service Submitters for wfs	
ecords Center Web Service Submitters	Records Center Web Service Submitters	
/eb Parts Members	Web Parts Members	
/eb Parts Owners	Web Parts Owners	
/eb Parts Visitors	Web Parts Visitors	
/eb Team Members	Web Team Members	
Veb Team Owners	Web Team Owners	
Veb Team Visitors	Web Team Visitors	

- 12. To add a user to a group click on the Group drop down list and select a group.
- 13. Click on New and select Add user to group.

#### **Check Permissions Tool**

The Check Permission tool will evaluate what permission a particular user or group has. To view the permission levels:

- 1. Open the Permissions page.
- 2. Click on the Check Permissions icon on the Ribbon.

Information Services > Academic Computing Services > Web Team > SharePoint BootCamp > Site Test					
Permissions: Site Test	Delete unique	Grant Create	Edit User Remove U	r Check Permissions	Permission Levels
Home Documents Site Contents	Inheritance	Grant	Modify	Check	Manage
				BRO	WSE PERMISSIONS

3. Enter the username or group name and click Check Now. A window will appear listing all the persmissions for that particular user or group.

Check Permissions	User/Group:	
or group, enter their name or e -mail address.	Boot Camp Owners x	Charle May Class
Permissions for "Boot Camp Owners"		Check Now Close
Full Control	Given directly	

# Edit Page

The Edit Page option allows you to customize the page by adding web parts, images, text, etc. You can begin editing 2 ways:

- 1. Click on the Settings Gear and select Edit page or...
- 2. Click on the Page tab on the ribbon.
- 3. Click on the Edit button.



#### 4. Page in Edit mode.

Informatio	on Services > Acader	nic Computing Services	Web Tea	am > Sharei	Point BootCamp > :	Site Test										
Site	Test - H	ome	save	Check Out	Paste S Undo	Body B I	* 0.87em * ∐ abc x₂ x² ⊘ • <u>A</u> •		AaBbCcDdEeFfC Paragraph	AaBbC( A	BbCcDd feading 2	AaBbCcDdEeF AaBbCcDdE Heading 3 Heading	4 ABC	Text Layout +	Edit Source	* ect +
Home	Documents	Site Contents		Edit	Clipboard		Font	Paragraph			Styles		Spelling	Layout	Ma	rkup
										BROWS	E PAG	E FORMAT TEXT	INSERT	FILES	LIBRARY	WEB PART
Doc	uments															V
	Name Modif	ied Modified By														
There	e are no docum	ents in this view.														

# **Editing Ribbon**

Save Check Out	Paste	Body $\sim$ 0.87em $\sim$ B I $\underline{U}$ also $\mathbf{x}_2$ $\mathbf{x}^2$ $\swarrow \sim \underline{\mathbf{A}}_{\sim}$		AaBbCcDdEeFf0 Paragraph	AaBbC( Heading 1	AaBbCcDd Heading 2	AaBbCcDdEe Heading 3	AaBbCcDdEeFf0 Heading 4	ABC Spelling	Text Layout +	Edit Source	ert to XHTML
Edit	Clipboard	Font	Paragraph			Styles			Spelling	Layout	Mark	up
					BRO	WSE P.	AGE FC	ORMAT TEXT	INSERT	FILES	LIBRARY	WEB PART

- 1. The ribbon gives you several options to choose from.
  - Format text: from here you can change the text font, text color, align text, etc.
  - Insert: from here you can insert a table, picture, web part, etc.

Table	Picture V	Video and Audio +	Link	Upload File	App Part	Web Part	Embed Code
Tables	Me	dia	Lin	ıks	Pa	rts	Embed
	BROW	'SE	PAGE	FOR	MAT TEXT	r I	NSERT

• Web Part: from here you can edit an existing web part on the page.



2. You can change the layout of the page by clicking on the **Text Layout** icon and selecting from the drop down list.



#### **Inserting Text**

- 1. If you would like to add text to the page click on the page where you would like the text to appear and start typing.
- 2. Click on Format Text on the ribbon to format your text.

#### **Inserting Pictures**

- 1. To insert a picture first click on the page where you would like the picture to appear.
- 2. Click on the Picture drop down arrow on the Insert ribbon and select one of the options:
  - From computer: you can upload a photo from your computer. Once the photo is selected it will be automaticlly uploaded to the SharePoint Site Assets library.
  - From address: you can upload a photo from a website. Copy and paste the URL of the photo into the address bar. Note: Be aware of copyright laws when uploading a photo from the web.

### **Inserting Web Parts**

A web part is an aggregation of information from other sources which can be displayed on a page. Web parts can display many types of data, including lists, libraries and other web pages.

- 1. To insert a web part first click on the page where you would like the web part to appear.
- 2. Click on the Web Part icon on the Insert ribbon. The Parts column will contain the apps that you have created.
- 3. Click on an app that you would like to add and click on Add.

Categories	Parts	About the part
Apps     Bog     Business Data     Community     Content Rollup     Document Sets     Filters	Announcements  Coursents  Helpful Links  MicroFeed  Site Assets  Site Pages	Announcements
Upload a Web Part 🔻		Add part to: Rich Content  Add Cancel

4. To delete a web part click inside the web part to select it, click on Web Part on the ribbon and click on Delete.

Information Services » Academic Computing Services » Web Team » SharePoint BootCamp » Site Test Site Test - Home Home Documents Recent V Site Contents				Web P Proper	art Insert Re Liss Relations	lated Minimize	Restor Delete State
	BROWSE	PAGE	FORMAT TEXT	INSERT	FILES	LIBRARY	WEB PART
Documents       new document <ul> <li>Name Modified By</li> <li>There are no documents in this view.</li> </ul>							V

- 5. When you are finished editing click on the Page icon to view the Save button.
- 6. Click on the drop down arrow to view the Save options.



- 7. Click Save to save and close the page.
- 8. Click on Save and Keep Editing to save the changes you have made and to keep the edit window open.
- 9. Click on Stop Editing to discard your changes and close the edit page.

#### Inserting a Hyperlink

- 1. Click on the Insert icon on the ribbon.
- 2. Click on the page where you would like the link to appear or highlight the text that you would like to turn into a link.
- 3. Click on the Link icon on the Insert ribbon.
- 4. Select from SharePoint or From Address.



- 5. If you select From SharePoint a window will open showing everything that can be linked to from the site.
- In this example I am linking to the Shared Documents library on the Permissions SharePoint site.

of the control of the	1001				
▲ S Permissions					
Documents					
MicroFeed					
🖻 Site Assets					
🛞 Site Pages					
Site Test					
					+
Location (UK): /vp/IS/acad/webteam/bo	otcamp/p/Shared Documents				→
			Insert	Cance	

- 7. If you select From address:
  - in the Text to display box type in the text you will be linking to
  - in the Address box type or paste in the URL you will be linking to
  - click on Try Link to make sure the URL is correct
  - click OK when finished

	×
Text to display:	
World News	
Address:	
http://www.cnn.com	
	Try link

- 8. After you click OK the Link ribbon appears.
  - you can fill in a description which will appear when you mouse over the link
  - you can have the link Open in a new window when clicked
  - you can remove the link from here



- 9. Enter the URL address in the Insert Hyperlink box and click OK.
- 10. Once you have created the hyperlink the Link Tools tab will appear on the ribbon.
- 11. You can add a description for the link, have it open in a new tab and display an icon.
- 12. To delete the hyperlink click Remove Link located on the Link Tools ribbon.

#### Creating a Document Link

- 1. Open the library that contains the document you wish to create a link for, right click on the document and select copy shortcut.
- 2. Click on the Edit button.
- 3. Type the text on the page where you would like the link to appear.
- 4. Highlight the text.
- 5. Click on Insert.
- 6. Select From Address.

Site Test - Home Home Documents Recent V Site Contents	Table Tables	Picture Video and Video and Media	Link Upload From SharePoint	App W Part Pa	t
		BROWSE	From Address	AT TEXT	INSERT
Anchor Links in Contribute					
			>	<	
Text to display: Anchor Links in Contribute					
Address: https://sharepoint.wcupa.edu/vp/IS/acad/webteam/Tutorials%20and%20Documentation/Anchors-Links-inContribute.docx					
				<u>Try link</u>	
			ОК	Cancel	

- 7. Click on Try link to verify that the link is correct.
- 8. Click Ok.
- 9. The link tools ribbon opens.
- 10. Enter a description, you can choose to have the link open in a new tab and display an icon.

	📇 URL:	/vp/IS/acad/webteam/Tutori	Open in new tab
Select Permove	Description:	Document	Display Icon
Link Link	bookmark:		
Link		Properties	Behavior

- 11. Click anywhere in the window to close the ribbon.
- 12. Click Save when finished editing the page.

# Customizing the Quick Launch Bar

The Quick Launch Bar typically highlights the important content in the current site, such as lists, libraries, and subsites. You use the Quick Launch to navigate between different areas of your site.



You can choose to have the same Quick Launch same as the parent site or create a custom Quick Launch bar.

#### Editing the Quick Launch Bar

- 1. Click on the Gear icon and select Site Settings.
- 2. Under the Look and Feel group click on Navigation.



- 3. To inherit the parent site navigation go to the Current Navigation section:
  - Select Display the same navigation items as the parent site.

Current Navigation	
Specify the navigation items to display in current navigation for this Web site. This navigation is shown on the side of the page in most Web sites.	Isiplay the same navigation items as the parent site (Parent is using Structural Navigation.)
	Managed Navigation: The navigation items will be represented using a Managed Metadata term set.
	Structural Navigation: Display the current site, the navigation items below the current site, and the current site's siblings
	$\odot$ Structural Navigation: Display only the navigation items below the current site
	Show subsites
	☑ Show pages
	Maximum number of dynamic items to show within this level of navigation: 20
4. To create a custom Quick Launch	n go to the Current Navigation section:
<ul> <li>Select Structural Navigat</li> </ul>	ion: Display only the payigation items below the current
	ion. Display only the havigation items below the current
site.	
Current Navigation	
Specify the navigation items to display in current navigation for this Web site. This navigation is shown on the side of the page in most Web sites.	<ul> <li>Display the same navigation items as the parent site (Parent is using Structural Navigation.)</li> </ul>
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Specify the navigation items to display in current navigation for this Web site. This navigation s shown on the side of the page in most Web sites.	<ul> <li>Display the same navigation items as the parent site (Parent is using Structural Navigation.)</li> <li>Managed Navigation: The navigation items will be represented using a Managed Metadata term set.</li> <li>Structural Navigation: Display the current site, the navigation items below the current site, and the current site's siblings</li> <li>Structural Navigation: Display only the navigation items below the current site.</li> </ul>

Show pages

• Option to Show Pages – every time a new product page, biography page, client information page, press release, etc. is added to the site the page will automatically be added to the navigation (likely in a drop down menu based on your structure). It is security trimmed so only users with access to the page will see the navigation item.

Maximum number of dynamic items to show within this level of navigation: 20

- Option to Show Sites every time a new client management, project management, department (or the like) site is created it will automatically be added to the nav, and is security trimmed as well.
- Set the maximum number of dynamic items to show stop run away navigation systems with too many options in the top level.

#### **Headings and Links**

A **Heading** creates a nested structure for similar links such as libraries, lists, subsites, etc. Or you can create a heading that is a single link such as a Home link that takes users back to the teamsite homepage.

A Link, located under a heading, navigates to a specific list, library or subsite.

#### Adding a Home Link

- 1. Click on the Settings icon and select Site Settings.
- 2. Under Look and Feel click on Navigation.
- 3. Click Add Heading.



- 4. In the Title box type Home.
- 5. Click on Browse.
- 6. Scroll down the window to locate the teamsite. In this example we are creating a Home link for the Web Parts site.

current cocations book closery rest at hit	say shareponterequired applicated webleam booteamplists book early rest	×
🔊 Site Pages		*
Tasks		
Team Discussion		
Test Contacts		
🖻 Test Doc Lib		
🖳 Test Lib		
▷ I Topics		
Training		
Updates		
S Vendor		
🖻 Wednesday		
🕏 Workflow Tasks		
Anderson		
Basic Training		
Permissions		
N Charles Text		
▶ S Web Parts		

- 7. Click on the teamsite link.
- 8. The URL will appear in the Location box.
- 9. Click Insert.

Location (URL): /vp/IS/acad/webteam/bootcamp/webparts/

10. Click Ok at the top or bottom of the page to save and close the page.

-

Cancel

Insert

#### Adding a Heading that Nests Links

If you want to add a heading for Libraries, Lists or Sites:

- 1. Go to Site Contents.
- 2. Copy the URL.

File	<b>W</b> https://sha	arepoint.wcupa.edu/	vp/IS/acad/webteam/	bootcamp/web	parts/_layouts/15/viewlsts.aspx	X D A - Q
	S S S	<b>NAREP</b>	oint ERSITY			
	PRESIDENT		ACADEMIC AI	FAIRS	ADMIN & FINAI	NCE ADVAN
	Information Server Site Cc	ices > Academic Cor Ontents	nputing Services > W	eb Team > Sha	rePoint BootCamp > Web Parts	
	Libraries 🗸	Discussions 🗸	Recent 🗸	Home	Site Contents	

- 3. Open the Navigation window.
- 4. In the Structural Navigation: Editing and Sorting section click on Add Heading.
- 5. Type in the name of the Heading.
- 6. Paste the URL into the URL box.
- 7. Click Ok.

Edit the title, URL, and description of the navigation item.	
Title:	Lists
URL:	/webparts/_layouts/15/viewlsts.aspx Browse
	Open link in new window
Description:	
Audience:	
	ОК С

#### Adding a Link

To add a link under a heading:

- 1. Open the Navigation window.
- 2. Click once on the heading where the link will appear to highlight it.
- 3. Click on Add Link.
- 4. Type the name of the library, list, etc. that will appear on the drop down list. **Note:** best practice is to name the link the same as the library or list, etc. that it will link to. This will eliminate any confusion for the user.
- 5. Type the title.
- 6. Click Browse.
- 7. Select the item to be linked and click Insert.
- 8. Click Ok.
- 9. Repeat these steps to add additional links.

#### **Ordering Headings and Links**

To change the order of a heading or Link:

- 1. Open the Navigation window.
- 2. Select the heading or link you wish to move.
- 3. Click on Move Up or Move Down until the item is positioned where you would like it to appear.
- 4. Click Ok to close the window.

#### Editing or Deleting a Heading or Link

- 1. Open the Navigation window.
- 2. Select the heading or link that you would like to edit.
- 3. Click Edit.
- 4. Make the changes.
- 5. Click Ok.
- 6. Select the heading or link that you would like to delete.
- 7. Click Delete.
- 8. Click Ok to close the window.

# **Recycle Bin**

Each site has a recycle bin from which deleted items can be restored; items such as documents, list items, entire lists and libraries, etc. **Note:** deleted items that are more than 30 days old will be permanently deleted from the Recycle Bin. The Recycle Bin is located on the Site Contents page.

- 1. Open Site Contents.
- 2. Click on Recycle Bin.

Site Contents												
Home	Sites 🗸	Pictures 🗸	Libraries 🗸	Lists 🗸	Discussions 🗸	Recent 🗸	People and Groups 🗸	New Items 🗸	Site Contents			$\sim$
Lists, Lib	oraries, and	d other Apps	5							SITE WORKFLOWS	<u>SETTINGS</u>	RECYCLE BIN (

- 3. To restore an item select it and click Restore Selection.
- 4. The item will be restored to the original location from where it was deleted.
- 5. To permanently delete the selection click on Delete Selection.

Recycle Bin										
Home Sites	<ul> <li>Pictures</li> </ul>	Libraries 🗸	Lists 🗸	Discussions 🗸	Recent 🗸	People and Groups 🗸	New Items 🗸	Site Contents		
Asstore Selection   X Delete Selection										
Type Name			Original Loca	tion		Created By		Deleted4	Size	
🔲 📢 🛛 Grand O	pening		/vp/IS/acad	/webteam/bootcam	p/Lists/Announcen	nents Szonntag, Julianna		12/23/2015 11:24 AM	< 1 KB	
🗵 🛗 Holiday	Concert		/vp/IS/acad	l/webteam/bootcam	p/Lists/Calendar	Szonntag, Julianna		12/23/2015 11:23 AM	< 1 KB	
🔲 🔟 Updates			/vp/IS/acad	/webteam/bootcam	p/Lists	Szonntag, Julianna		12/23/2015 11:23 AM	45.6 KB	
🔲 🛍 check-in	out.docx		/vp/IS/acad	l/webteam/bootcam	p/Training	Szonntag, Julianna		12/23/2015 11:23 AM	1.5 MB	
🗷 🛍 helpful-h	tml-links.docx		/vp/IS/acad	/webteam/bootcam	p/Training	Szonntag, Julianna		12/23/2015 11:23 AM	24 KB	
🔲 🛍 FillableFo	orm-example.docx		/vp/IS/acad	l/webteam/bootcam	p/Training	Szonntag, Julianna		12/23/2015 11:23 AM	108.4 KB	

NOTES: