

# Software Application Training

WEST CHESTER UNIVERSITY



## Creating a Teamsite

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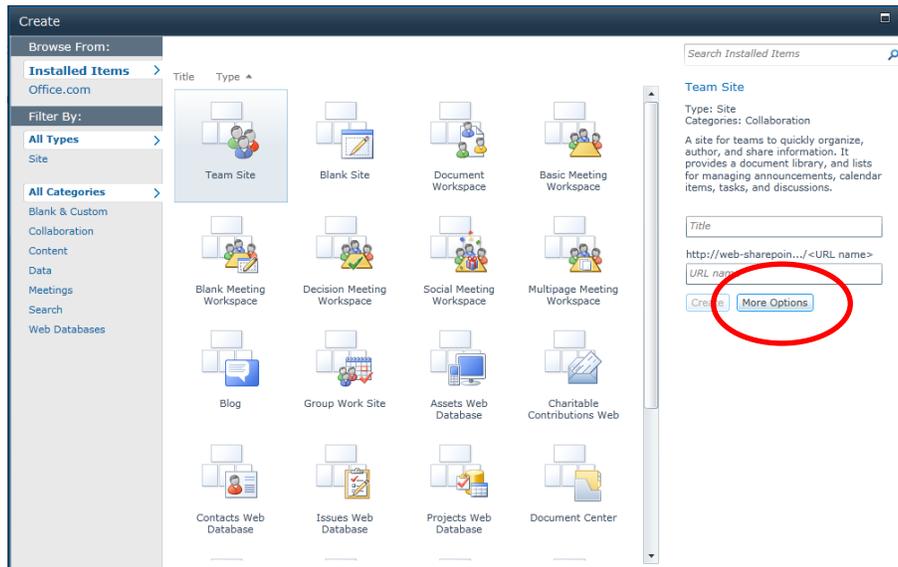
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## Creating a Teamsite

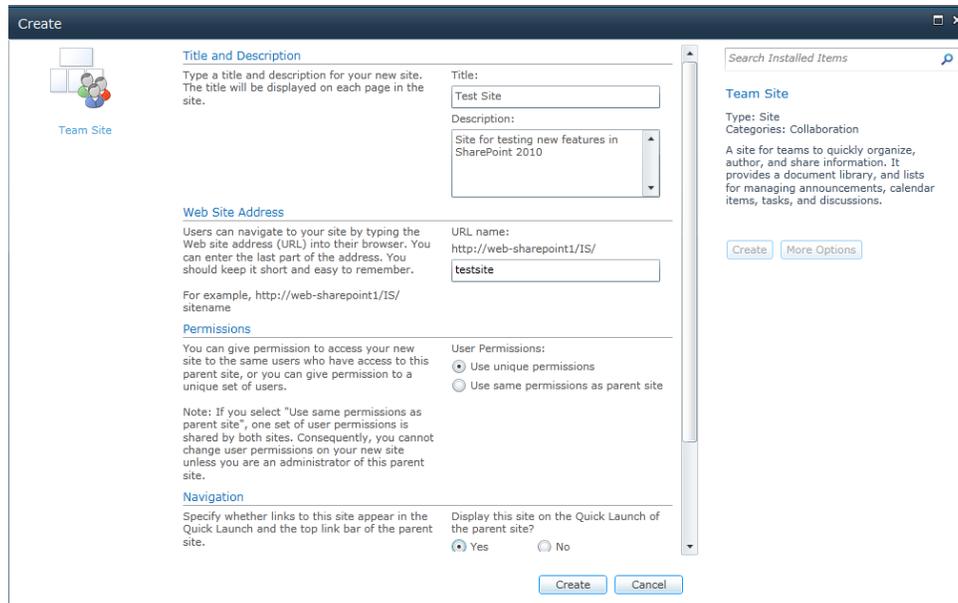
A teamsite comes with announcements lists, discussion boards, document libraries, a calendar, a links list, a wiki page library, and a task list already configured and ready for use. These components of the site allow you and your team to quickly set up and begin collaborating on your projects.

### Create a Site based on a Template

1. Click on the Site Actions menu and select New Site.
2. Click on any site icon and notice that on the right side of the window the creation attributes are dynamically displayed for each item.
3. Click on Team Site to select it then click on More Options.

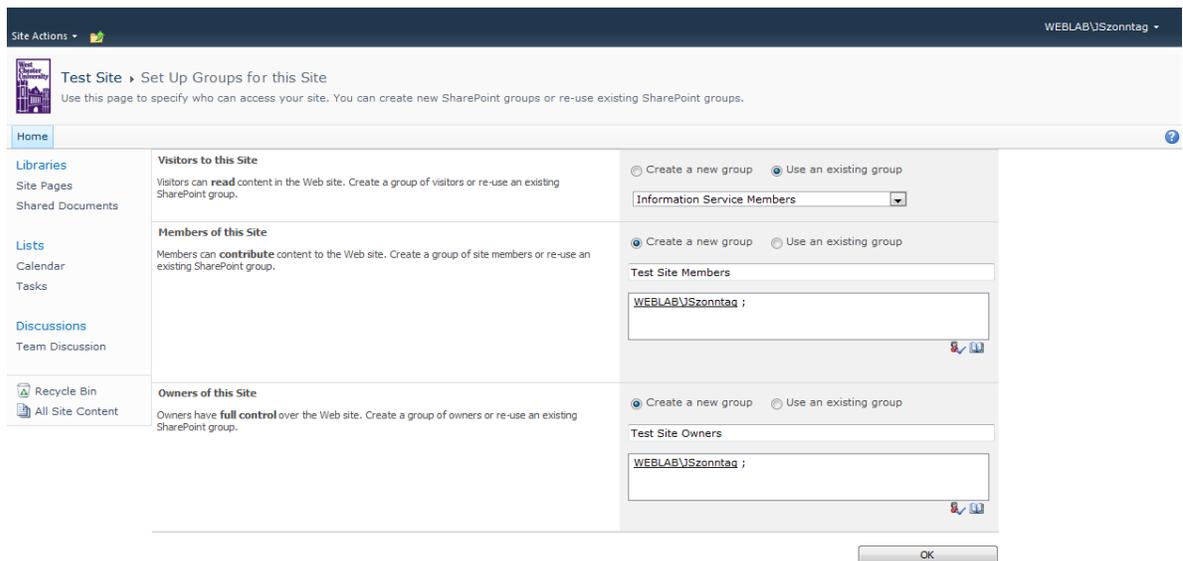


4. Enter a title and description for the site.
5. Enter a URL for the site. **NOTE:** When entering the URL you only need to specify what the site name (last portion of the URL) will be. SharePoint will automatically generate the first portion of the URL. Keep the URL short do not use spaces, use hyphens instead.
6. If you do not want the site to inherit permissions from the parent site click Use unique permissions.
7. Select whether or not you would like the site to appear on the Quick Launch of the parent site.
8. The new site can inherit the top link bar from the parent or have it's own.
9. Click Create.

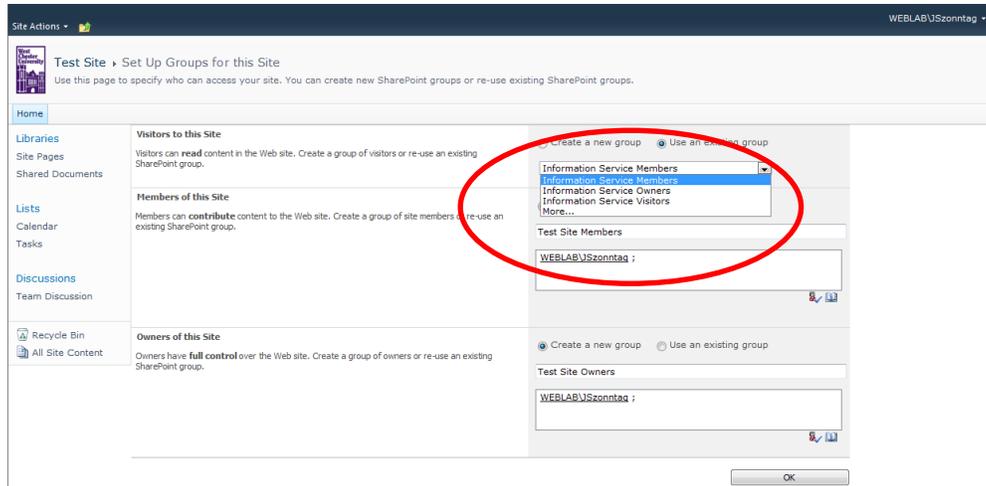


## Permissions

By selecting Use unique permissions, the Set Up Groups for this Site window will appear. Use this page to specify who can access your 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.*

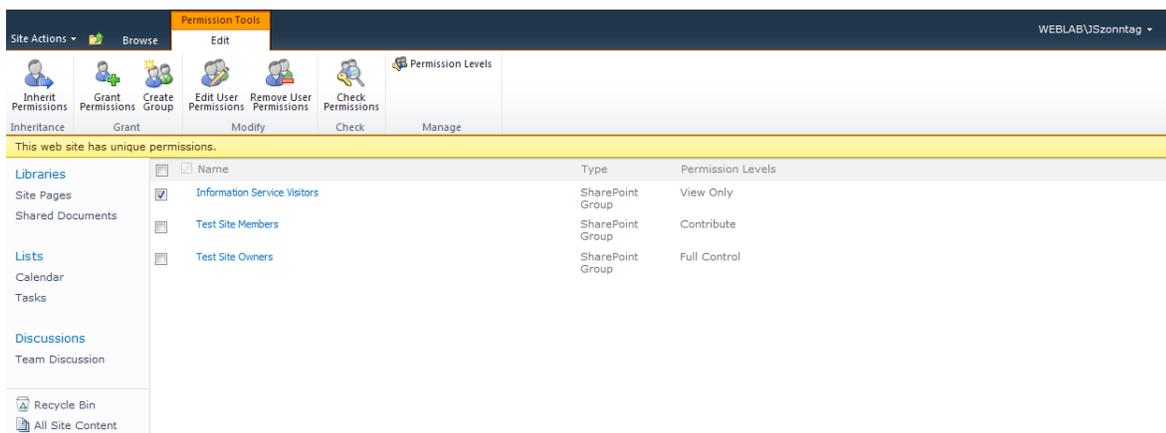


1. Visitors to this Site: create a group of visitors or re-use an existing SharePoint group. To use an existing group click on the down arrow and select from the list. To see a complete list of groups click on More...

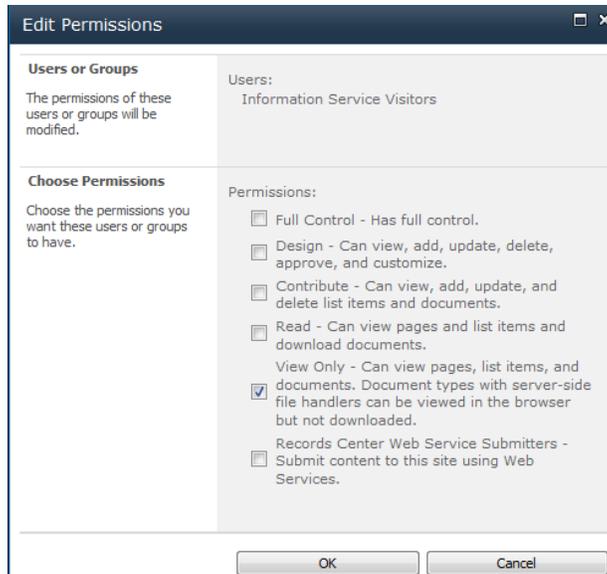


2. Members of this Site: a new group is automatically created for this group. You can add members to this group by typing in the user's name or clicking on the address book icon . Separate each user's name with a semicolon.
3. Owners of this Site: a new group is automatically created for this group. You can add members to this group by typing in the user's name or clicking on the address book icon. Separate each user's name with a semicolon. Permissions are cumulative, therefore if you add someone to the Owners group there is no need to add them to the other groups.
4. Click Ok when all of the changes have been made.

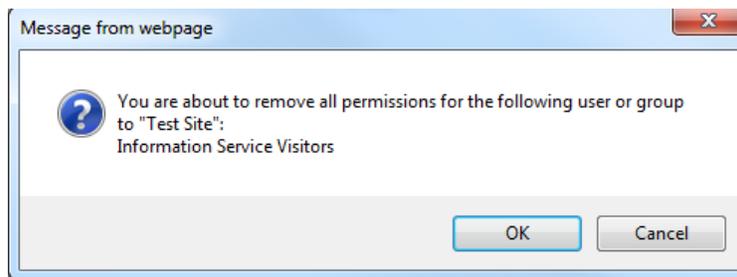
To check or make changes to group or individual permissions click on Site Actions and select Site Permissions. From this page you can grant permissions, create new groups, edit or remove user permissions.



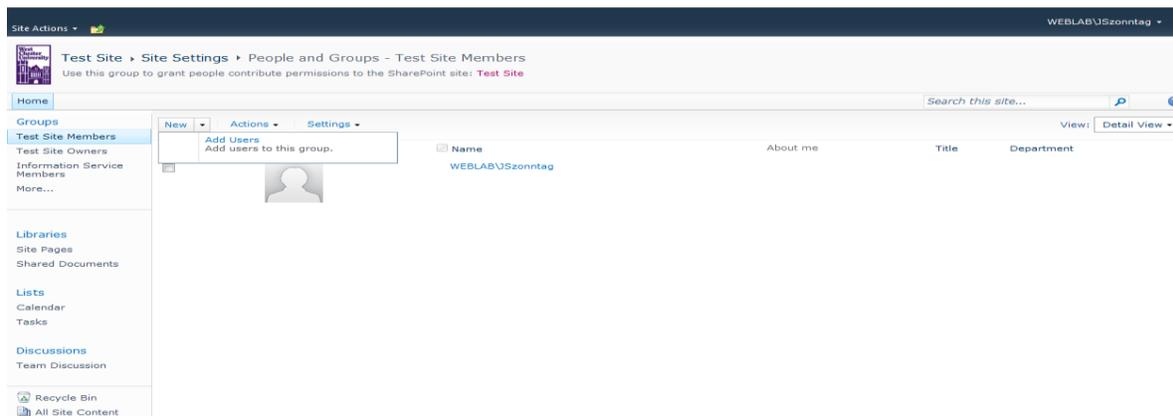
1. Edit User Permissions: check the box next to the group or individual name that you would like to make the changes to and click on Edit User Permissions. Select the new permission level and click Ok.



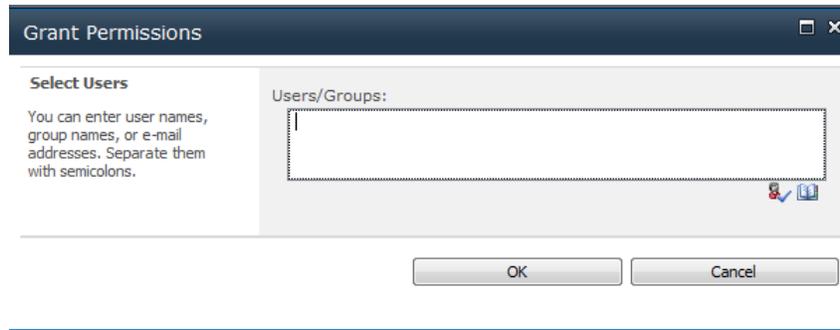
2. Remove User Permissions: check the box next to the group or individual name that you would like to remove all permissions for. A warning window appears, click Ok to remove permissions.



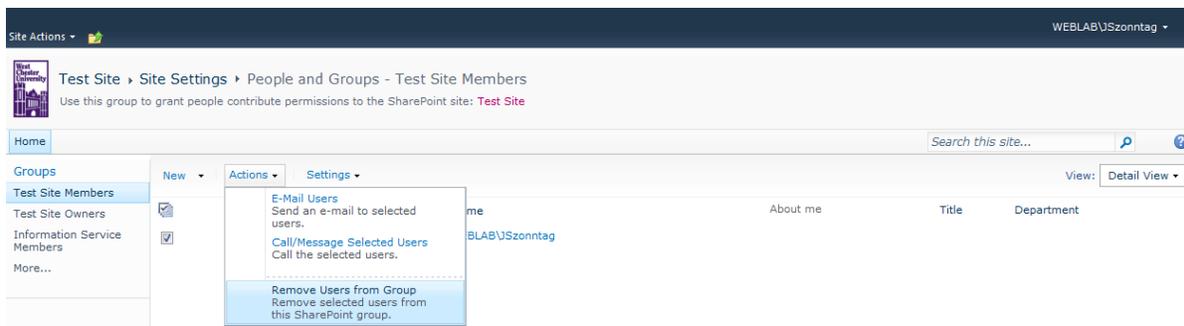
3. Add or Remove Individuals from a Group: click on the group name, click the New drop down menu and select Add Users



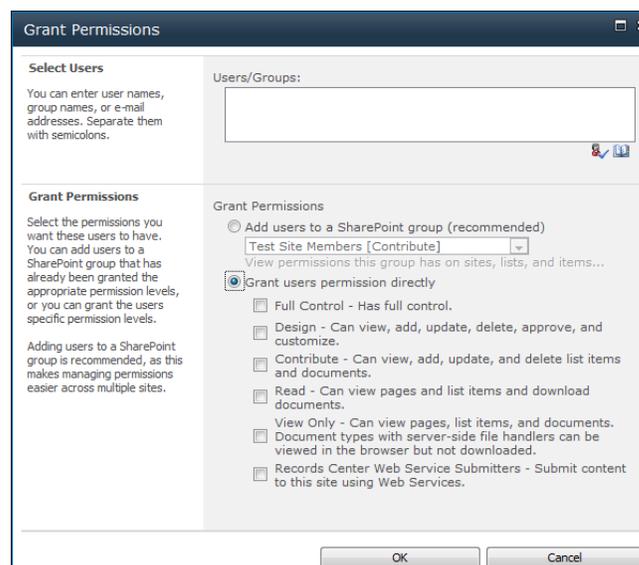
4. Enter the user name. You can enter more than one user name, separate the names with a semicolon. Click Ok when finished.



- To remove a user from a group, click on the group name check the box next to their name and click on the Actions pull down menu. Select Remove Users from Group, a warning window will appear, click Ok.



- Grant Permissions: to add individual users or groups to a site click on Grant Permissions. Enter the user names or group names, remember to separate them with a semicolon. Select which SharePoint group the user should be added to or grant them permissions directly by selecting Grant users permission directly. Click Ok when finished.

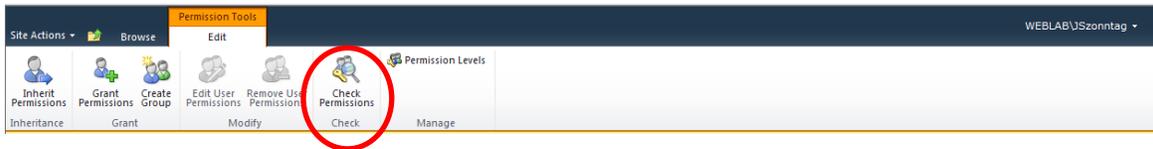


7. Create Group: to create a new group click on Create Group, enter the group name, description and select a permission level. Click Create when finished.

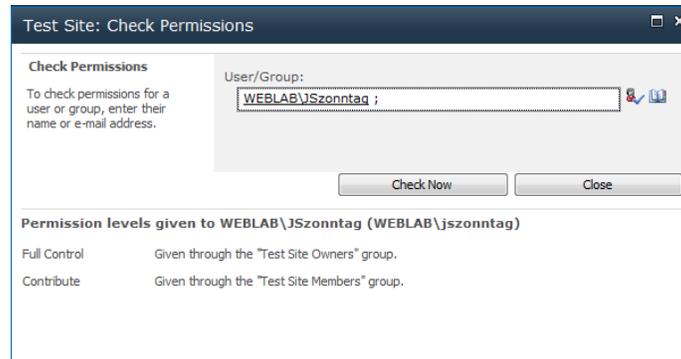
## Check Permissions Tool

New to SharePoint 2010 the Check Permission tool will evaluate what permission a particular user or group has. To view the permission levels:

1. Click on the Site Actions pull down menu and select site permissions.
2. Click on the Check Permissions icon on the Ribbon.



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

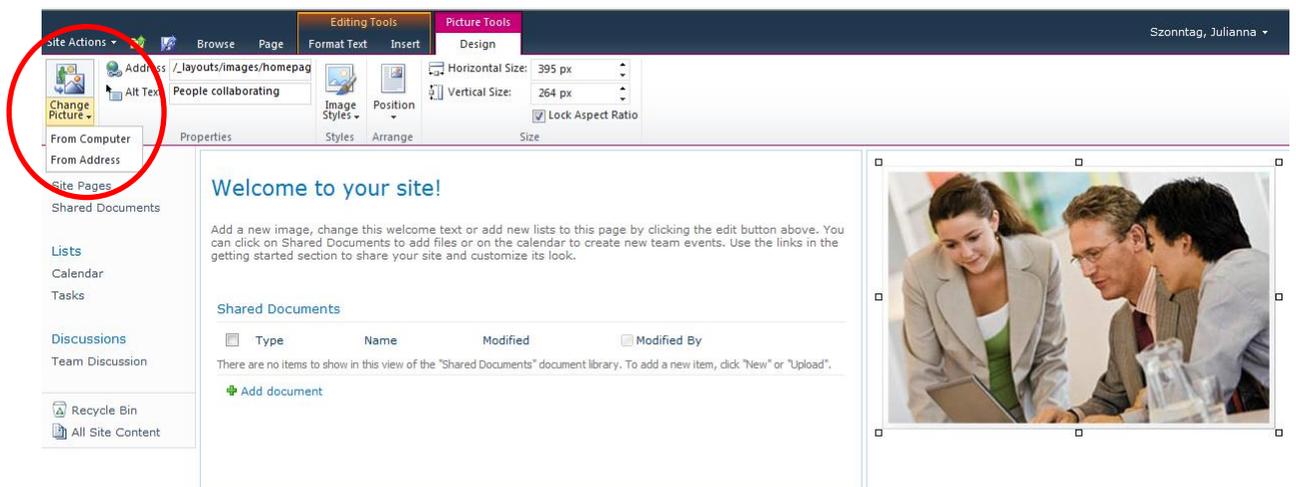


## Edit Page

The Edit Page option is used to change the site image, the welcome text or add new lists to the page. To begin editing click the Edit button  located to the right of the Site Actions drop down menu on the Ribbon or click on Site Actions and select Edit Page.

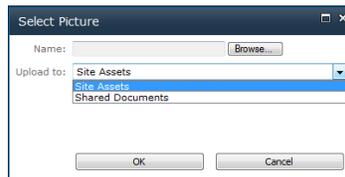
Change the Site Image:

1. Click the Edit Button.
2. Click on the picture to highlight it.
3. Click on the Picture Tools tab that appears on the Ribbon.
4. Select the Change Picture icon.
5. Select the location to upload the picture from; either from you computer or from the web.

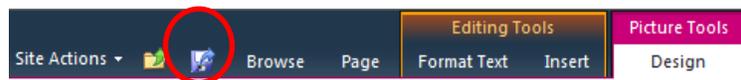


- If you select a picture stored on your computer it will upload to your **Site Assets** library or one of the other site libraries. Select which library to upload the picture to by clicking on the down arrow.

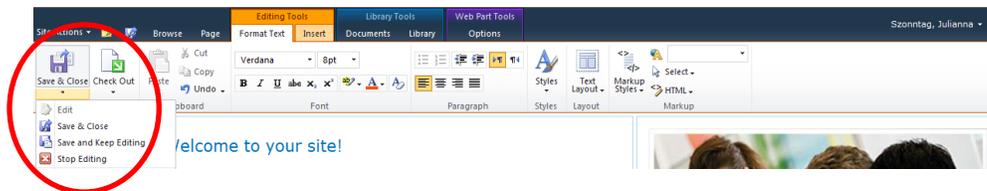
**Asset Library:** An asset library is a document library that is specially designed to store digital assets such as images, audio files, and videos. This kind of library can be used as a repository for media files that will be used throughout the SharePoint environment, for example corporate logos, training videos, etc.



- When you are finished making your changes click on the Save & Close icon.

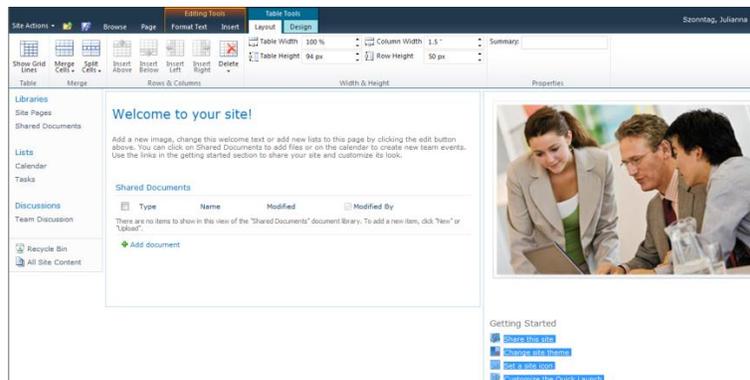


- You can also click on the Save & Close icon that has more options. From here you can:
  - Save and Close
  - Save and Keep Editing
  - Stop Editing

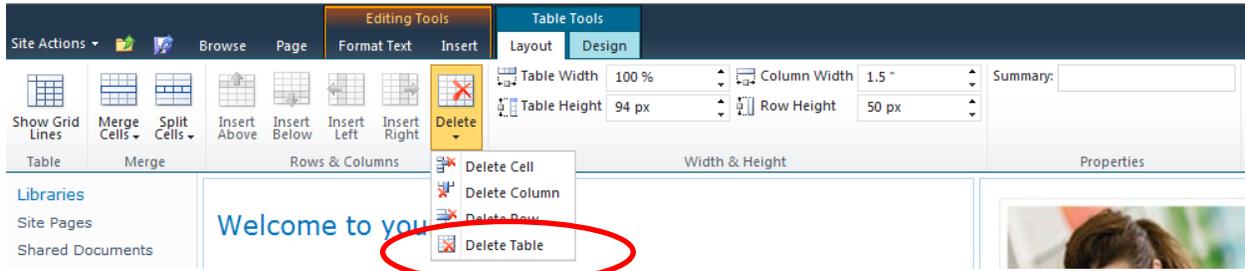


## Remove the Getting Started Links

- Highlight all the links. Notice the Table Tools tab that appears on the Ribbon. The getting started links are a table.



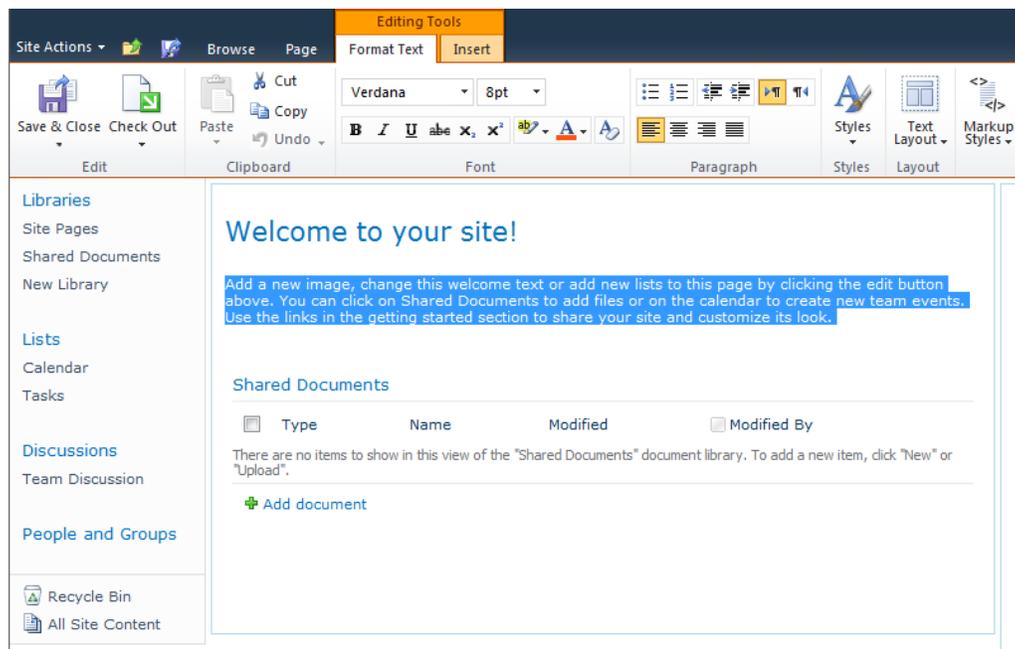
2. Click on the Layout tab under Table Tools and click on the Delete icon. Click Delete Table.



3. Highlight the text Getting Started and hit the backspace key to delete the text.
4. Click Save and Close before exiting the page.

## Content Editor

1. Highlight the text to edit and select the font and size from the Format Text tab. Additional formatting options are located on the Ribbon.

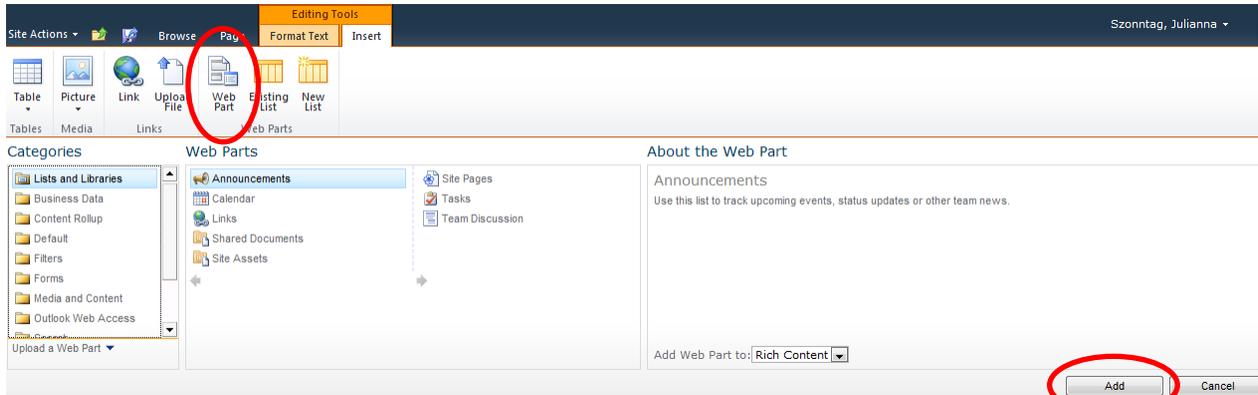


2. Click Save and Close before exiting the page.

**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.

### Adding a Web Part

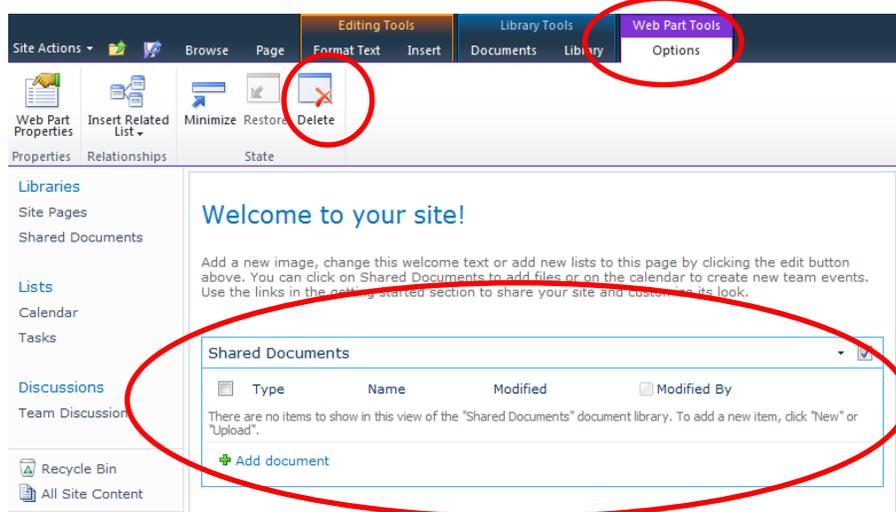
1. Click on the page where you would like to insert a web part.
2. Click on the Insert tab located under the Editing Tools tab to activate the Ribbon.
3. Select the Web Part icon on the Ribbon to display the web part choices.



4. Highlight the web part and click Add to insert it onto the page.

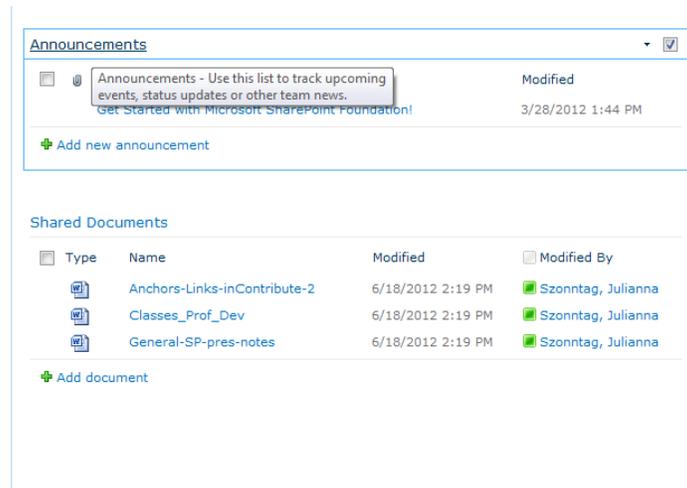
**Removing a Web Part:** when you remove a web part you are not deleting the information contained within the web part, you are only removing the link to it.

1. To remove a Web Part, such as the Shared Documents library shown in the example below, click to highlight it this will activate the Web Part Tools tab on the Ribbon.
2. Click on the Web Part Tools tab and select Delete.

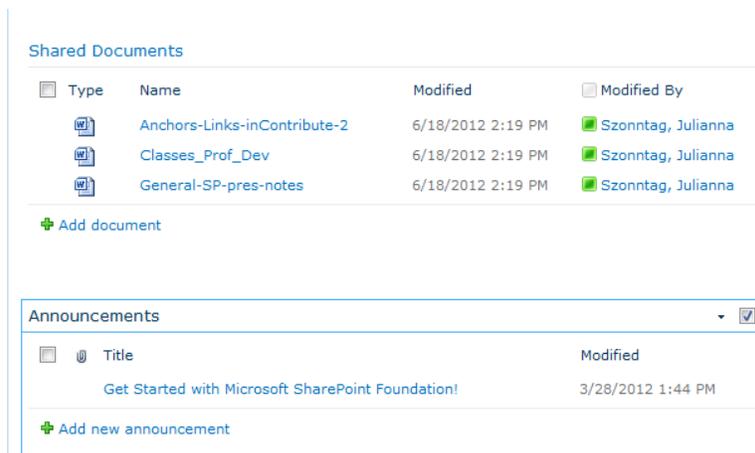


## Drag and Drop Web Parts on a Page

1. Click the Edit button on the ribbon to begin editing the page.
2. Click on the title of the web part that you would like to move.



3. Drag it to the new location and release the mouse.



4. Announcements is now located below the Shared Documents web part.

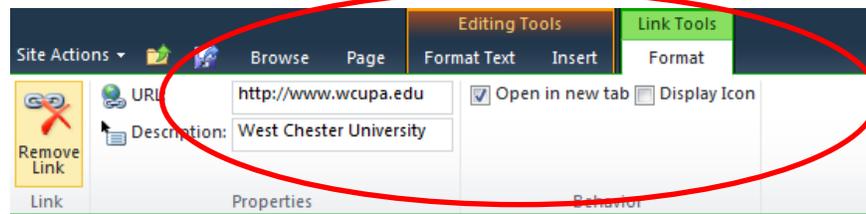
## Creating Links

### Creating a hyperlink

1. Click on the Edit page icon located on the ribbon.
2. Highlight the text you would like to turn into a hyperlink.
3. Click on the Insert tab located under Editing Tools on the ribbon.
4. Click on the Link icon.



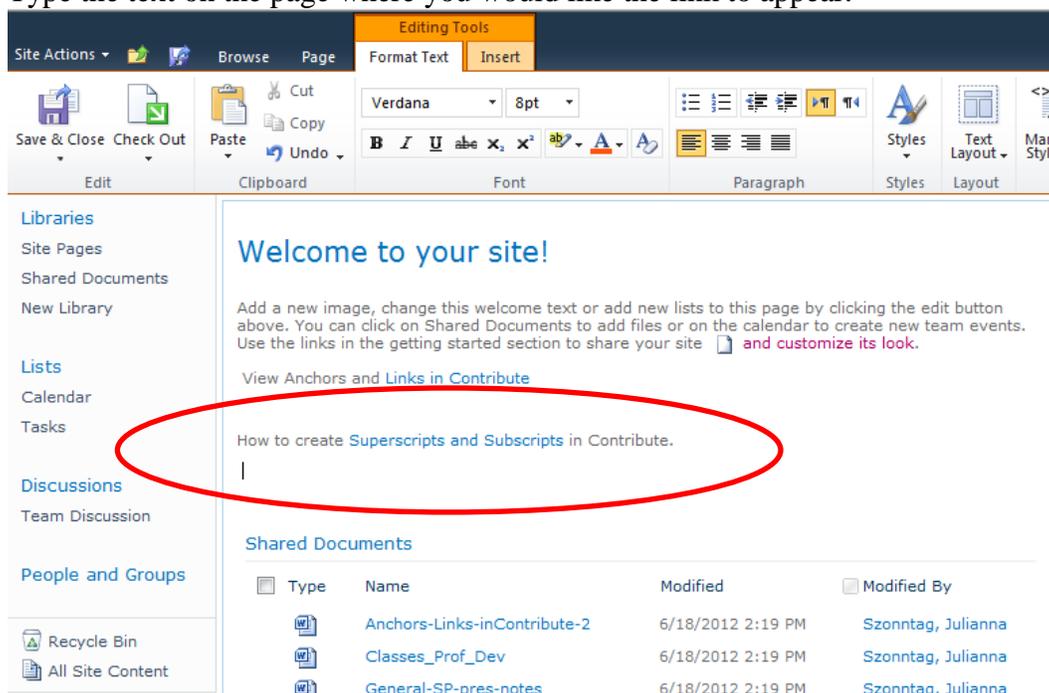
5. Enter the URL address in the Insert Hyperlink box and click OK.
6. Once you created the hyperlink the Link Tools tab will appear on the ribbon.
7. You can add a description for the link, have it open in a new tab and display an icon.



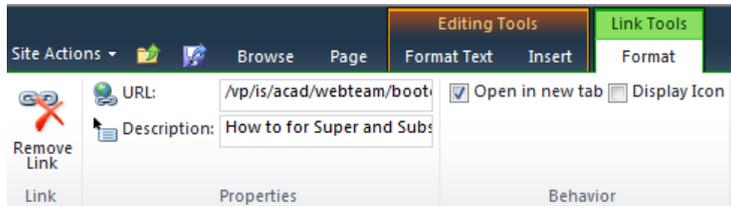
8. To delete the hyperlink click Remove Link located on the Link Tools ribbon.

### 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 that will become the link.
5. Click on the Insert button.
6. Click on the Link icon.
7. Paste the URL into the Link box.
8. Click Ok.
9. Click the Link Tools tab, enter a description and check the Open in new tab option if you would like the link to open in its own window.

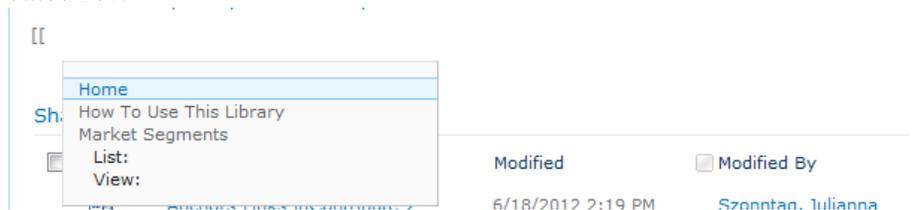


## Create a link using Double Brackets

Links can be created to pages and lists within a teamsite by using double brackets instead of the link icon.

### Creating a link to a Page

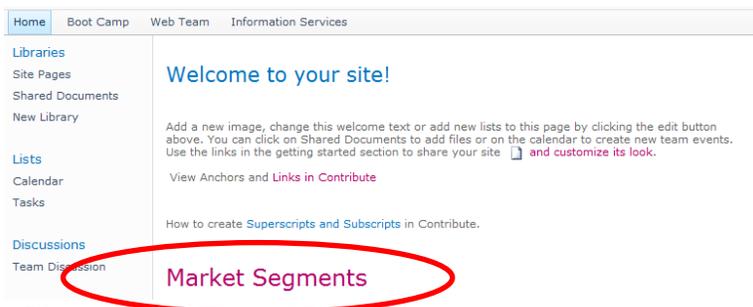
1. Click the Edit button to begin editing.
2. Place the cursor where the link should appear.
3. Type double brackets, [[, SharePoint shows the pages within the teamsite that a link can be created for.



4. Select an item by using the down arrow, hit enter.
5. SharePoint will automatically add the 2 closing brackets. **Note:** if you would like a larger font for the link, change the font size before you start typing.

[[Market Segments]]

6. Click Save and Close, the link becomes active.



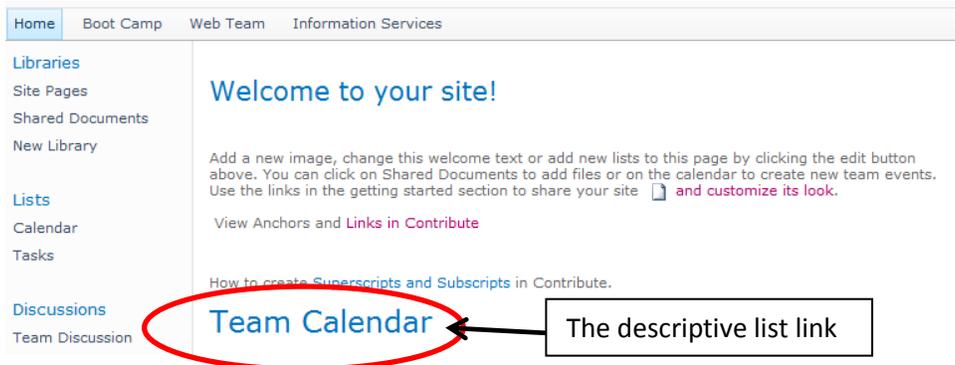
### Creating a link to a List

1. Follow steps 1 through 3 from the section above.
2. Select List from the list of options.
3. The word list appears inside double brackets. **[[List:]]**
4. Type the name of the list that you would like to link to after the semicolon. For example, Announcements, Calendar, Team Discussion, etc. **[[List:Calendar]]**

5. You can insert descriptive or alternate text for the list link if you want a name other than the list name.
6. Insert a pipe symbol ( | ) after the word Calendar and add the text Team Calendar, there are no spaces before or after the pipe sign.

[[List:Calendar|Team Calendar]]

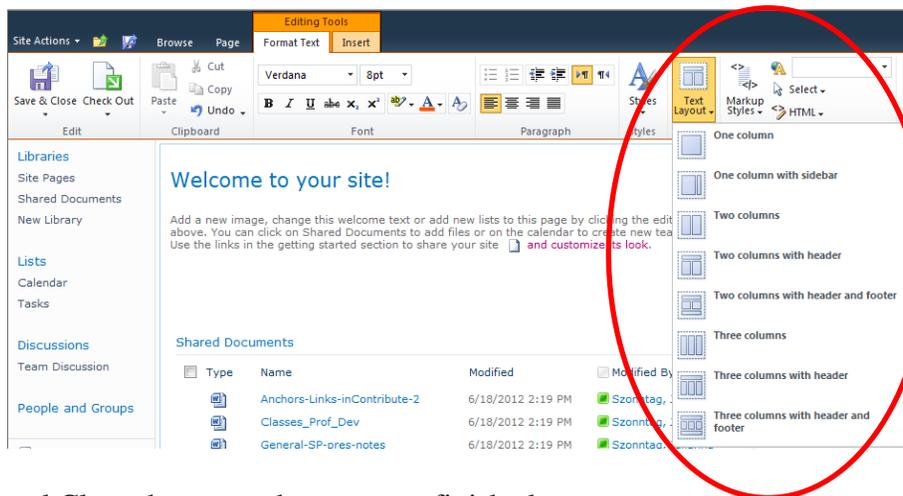
7. Click Save and Close for the link to become active.



### Changing the Text Layout

There are several design options to choose from for the page layout. **Note:** You will not lose any content when you change the text layout of the page.

1. Click on the Edit button to begin editing the page.
2. Click on the Text Layout drop down menu.
3. Select the option that best suits your needs.



4. Save and Close the page when you are finished.

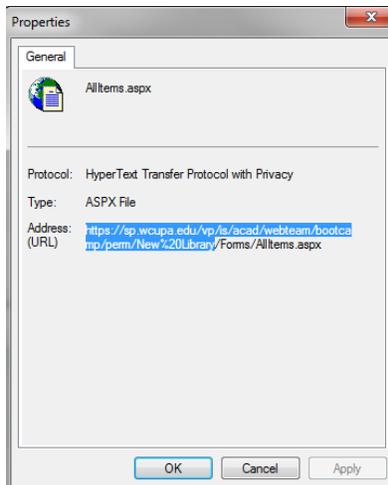
## Customizing the Quick Launch Bar

### Adding a New Navigation Link

**Note:** best practice for creating new links is to have the URL at hand prior to adding the link.

We will demonstrate how to add a library link.

- Go to All Site Content to find the library you would like to add to the Quick Launch bar.
- Right click on the library name and go to properties.
- Copy the URL of the library **except** for the /Forms/Allitems.aspx portion.

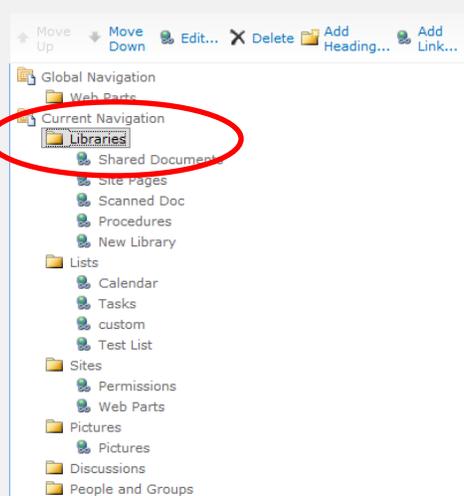


- Close the window.

- Click on the Site Actions drop down menu and go to Site Settings.
- Under the Look and Feel category click on Navigation.
- Scroll down to the Navigation Editing and Sorting section.
- Under the Current Navigation section click on the heading where you would like to add a link. In this example we will add a library under the Libraries section.

**Navigation Editing and Sorting**

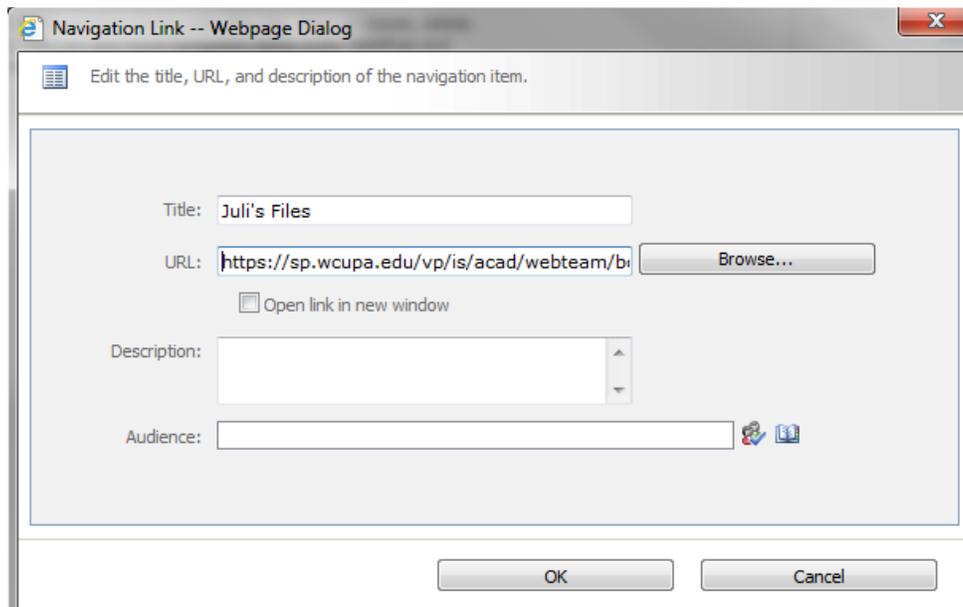
Use this section to reorder and modify the navigation items under this site. You can create, delete and edit navigation links and headings. You can also move navigation items under headings and choose to display or hide pages and subsites.



5. Click on Add Link.



6. Type a title for the link in the Title box.
7. Paste the URL into the URL box.
8. Click Ok.



9. The name of the Library will appear in the Library list.
10. Scroll to the bottom of the page and click Ok.

### Delete a Navigation Link

1. Click on the Site Actions drop down menu and select Site Settings.
2. Under Look and Feel click on Navigation.
3. Click on the link that you would like to delete.
4. Click Delete. **Note:** this does not delete the library, only the link is deleted.

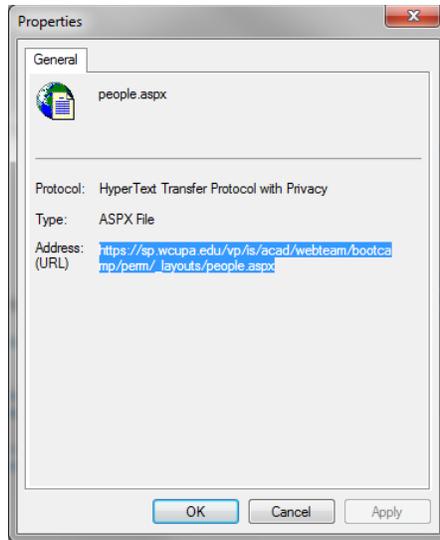


5. Scroll down to the bottom of the page and click OK.

### Adding a New Heading

**Note:** best practice for creating a new heading is to have the URL at hand prior to adding the link. We will demonstrate how to add the People and Groups heading.

- a) In Site Settings under the Users and Permissions group right click on People and Groups.
- b) Go to Properties.
- c) Copy the entire URL.

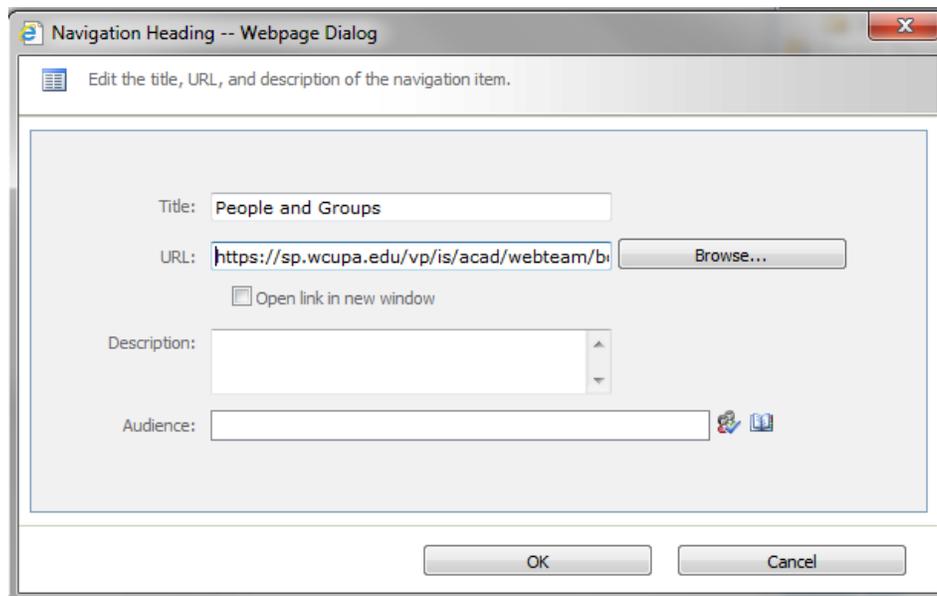


d) Close the window.

1. From the Site Actions drop down menu select Site Settings.
2. Under Look and Feel select Navigation.
3. Click on Current Navigation to select it.
4. Click on Add Heading.



5. Type People and Groups into the description box.
6. Paste the URL into the web address box.
7. Click Ok.



8. Scroll down to the bottom of the page and click Ok.

## Delete a Heading

1. Click on the Site Actions drop down menu and select Site Settings.
2. Under Look and Feel click on Navigation.
3. Click on the heading that you would like to delete.
4. Click Delete.

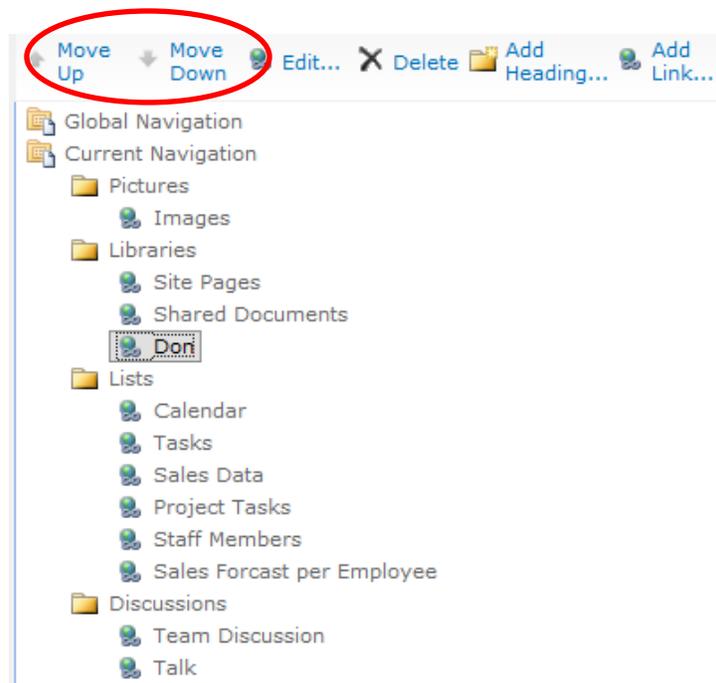


5. Scroll to the bottom of the page and click Ok.

## Change Order in the Quick Launch bar

You can change the order of how items appear in the Quick Launch bar.

1. Click on the Site Actions drop down menu and select Site Settings.
2. Under Look and Feel click on Navigation.
3. Click on the link or heading that you would like move up or down.
4. Click on the Move Up or Move Down option.



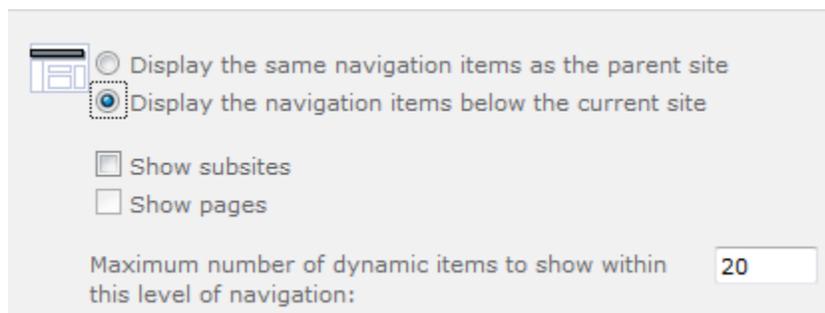
5. Scroll down to the bottom of the window and click Ok.

## Customizing the Top Link Bar

**Note:** If a site is renamed from the Title, Description, and Icon page, the site name is not updated on the top link bar. To change the name that appears on the top link bar, you must edit the top link bar.

### Adding a Link to the Top Link Bar

1. On the Site Actions menu, click Site Settings.
2. In the Look and Feel group, click Navigation.
3. If the site is displaying the same navigation links as the parent site the Global Navigation option will not be visible in the Navigation Editing and Sorting section.
4. To activate the Global Navigation option, click on Display the navigation items below the current site.



5. Scroll down to the Navigation Editing and Sorting section.
6. Click on Global Navigation.
7. Click on Add Heading or Add Link and follow the same steps as described above in the Quick Launch section.
8. To reorder or delete links follow the same steps as described above in the Quick Launch section.
9. To display the same navigation links as the parent site, click on Display the same navigation items as the parent site. The navigation links that you added will disappear.
10. Scroll down to the bottom of the page and click Ok.

## Recycle Bin

Each site has a recycle bin from which deleted items can be restored; items such as documents, list items and libraries. **Note:** deleted items that are more than 30 days old will be automatically emptied.

1. Click on the Recycle Bin link located at the bottom of the Quick Launch bar.
2. Check the box next to the item or items that you would like to restore and click on Restore Selection.

Site Actions Szonntag, Julianna

West Chester University

Permissions > Recycle Bin

Use this page to restore items that you have deleted from this site or to empty deleted items. Items that were deleted more than 30 day(s) ago will be automatically emptied. To manage deleted items for the entire Site Collection go to the [Site Collection Recycle Bin](#).

Home Boot Camp Web Team Information Services Search this site...

Libraries [Restore Selection](#) [Delete Selection](#)

Type	Name	Original Location	Created By	Deleted	Size
<input checked="" type="checkbox"/>	New Library	/vp/s/acad/webteam/bootcamp/perm	Szonntag, Julianna	6/18/2012 2:28 PM	146 KB
<input checked="" type="checkbox"/>	do-not-expire.xls	/vp/s/acad/webteam/bootcamp/perm/Shared Documents	Szonntag, Julianna	6/18/2012 2:20 PM	22.4 KB
<input type="checkbox"/>	anchors-links-incontribute.docx	/vp/s/acad/webteam/bootcamp/perm/Shared Documents	Szonntag, Julianna	6/18/2012 2:20 PM	289 KB
<input type="checkbox"/>	daff_days-2012-order-form.doc	/vp/s/acad/webteam/bootcamp/perm/Shared Documents	Szonntag, Julianna	6/18/2012 2:20 PM	68 KB
<input type="checkbox"/>	daffodil_days.docx	/vp/s/acad/webteam/bootcamp/perm/Shared Documents	Szonntag, Julianna	6/18/2012 2:20 PM	19.5 KB

Site Pages

Shared Documents

New Library

Lists

Calendar

Tasks

Discussions

Team Discussion

People and Groups

[Recycle Bin](#)

[All Site Content](#)