

SharePoint

- SharePoint was born out of a simple idea: “Sharing Documents”. Microsoft developed a family of software products called “SharePoint”, to perform features like File Sharing, Collaboration, and Web Publishing.
- In simple terms, SharePoint acts as the single platform to share, communicate, store, and collaborate the content, documents, and records.
- Microsoft SharePoint is a browser-based collaboration, document management platform and content management system.
- Using SharePoint, you can manage your colleague’s and your own documents, social activities, data, and information.

List:

- Lists are really the data storage mechanism within SharePoint.
- It provides the user interface to be able to view the items in a list, add, edit, and delete items or view individual items.
- A List is similar to a Library, except that it is a collection of information, where your department can store, share and manage information (not files).

Create a list in SharePoint Server 2010:

Click **Site Actions**, click **View All Site Content**, and then click **Create**

Click one of the categories, such as **Communications** or **Tracking** and choose from there.

Type the **Name** for the list. Name is required.

Optionally you can click Advanced Options, and type the **Description** for the list and set other options.

Click **Create**.

Library:

A **SharePoint library** is a location on a site where you can create, store, update, and collaborate on files with team members.

Create a library in SharePoint Server 2010:

Navigate to the site where you want to create the library.

Click Site Actions, **click** View All Site Content, and then click **Create**.

Under Libraries, **click the type of library that you want, such as** Document Library **or** Picture Library.

In the **Name** box, type a name for the library. The library name is required.

And type the **Description** for the list and set other options.

Click **Create**.

Views:

Using views is a useful way for a list manager to create different ways to show the information in a list or library. Different views may show different columns and have different sorting and filtering, grouping, and styles.

In SharePoint, views can be either public or private:

- **Public**—The list's or library's managers create public views, and these views are available to anyone to use.
- **Private**—Users create private views. Only the user who created a private view can use that view. You may, for example, create a private view and customize it to show the information that you usually need to find the items or files that you usually work with.

Create a View:

Go to the list or library where you want to create a view, click the **List** or **Library** tab, and then click **Create View**.

On the **Settings** page, choose a view type. i.e., Standard view, Calendar view, Datasheet view etc.

In the **View Name** box, type the name for your view. Select **Make this the default view** if you want to make this the default view for the list or library. Only a public view can be the default view for a list or library.

In the **Audience** section, under **View Audience**, select **Create a Personal view** or **Create a Public view**. Create a personal view when you want a view just for yourself. Create a public view when you want everyone who uses the list to see it.

In the **Columns** section, select the columns that you want in the view and clear the columns that you don't want to appear. Next to the column numbers, select the order that you want to columns to appear in the view.

Configure the other settings for your view, such as **Sort** and **Filter**, and click **OK** at the bottom of the page.

Pages:

A standard **page** contains text, images, Web Parts, and other elements.

A Web Parts **page** contains Web Parts in Web Part zones.

SharePoint Page types:

There are two primary types of pages in Microsoft sharepoint foundation,

1. Site Pages
2. Application Pages

Site Pages:

Site pages are the pages that are created, edited, customized by end users. They are primarily used for contents in a site.

Site pages come in two types: A Standard Page and a Web Parts page.

A **standard page** contains text, images, Web Parts, and other elements.

A **Web Parts page** contains Web Parts in Web Part zones.

By default, most of the pages that appear when you create a SharePoint site are site pages.

Application Pages:

Application pages are used to support application implementations in SharePoint

Foundation.

An Application page is an ASP.NET Web page that is designed for use in a SharePoint Web site.

Application pages are shared across all sites on the server, whereas a site page is specific to one site.

Web Part:

- Web Part means parts of a web.
- Web Parts are the building blocks for building web pages in SharePoint.
- A Web Part can be reused, shared and personalized by all the users who have permission to access it.
- By using web parts, you can modify the content, appearance, and behaviour of pages of a SharePoint site by using a browser.

Web Parts in SharePoint:

In SharePoint Foundation 2010, Web Parts are organized in the following categories:

- Lists and Libraries
- Media and Content
- Content Rollup etc.

Lists and Libraries:

Web Parts in this category are intended primarily to facilitate collaboration and communication among team members.

When you create a new team site, the home page for that team site automatically contains Announcements, Calendar, Links, and Site Image Web Parts.

Web Part(Lists and Libraries)

Announcements: The Announcements list contains messages posted by contributors to the

site (who have necessary permissions). Use the List View Web Part named Announcements to display and update these messages on a site.

Calendar: The Calendar list contains upcoming meetings, deadlines, and other important events. You can add a Calendar List View Web Part to various locations on a site to display and update the information on the calendar.

Links: The Links list contains links to Web pages that your team members will find interesting or useful. You can use the Links List View Web Part to display important or interesting links in different locations on your site.

Tasks: The Tasks list is where team members can keep track of work that needs to be done. Add the Tasks List View Web Part to a page to view and update the list of tasks.

Media and Content:

The Media and Content Web Parts are useful for displaying text, images, and video on a page.

Web Parts (Media and Content):

Content Editor: The Content Editor Web Part enables you to add formatted text, tables, hyperlinks, and images to a page. For example, you can use the Web Part to:

- Add a formatted introductory paragraph to a page
- Add a table of instructions to explain a chart on your page, the data that is used in the chart, and how the chart was created
- Add a set of hyperlinks to more information

User can use content editor web part to add html/CSS/JavaScript, embed videos or widgets, formatted text, tables, hyperlinks, images, and display content from other SharePoint sites to a web part page.

Image Viewer: The Image Web Part displays a picture or other image on the page.

Page Viewer : The Page Viewer Web Part displays Web pages, files, or folders on the page.

Content Rollup:

The Content Rollup Web Parts are useful for displaying dynamic content on a page.

Web Parts(Content Rollup):

Picture Library Slideshow: This Web Part displays the images from a Picture Library as a slide show, displaying one image at a time as it automatically rotates through the images in the Picture Library.

XML Viewer: Use this Web Part to display Extensible Mark-up Language (XML) and apply Extensible Style sheet Language Transformations (XSLT) to the XML before the content is displayed.

We can use the XML Web Part to display structured data from database tables or queries, XML-based documents, or XML forms that combine structured and unstructured data, such as weekly status reports or travel expense reports.

Create a permission level:

You create and make changes to permission levels on the **Permissions Levels** page.

On the top-level site of the site collection, click **Settings** -> **Site Settings**.

On the **Site Settings** page, in the **Users and Permissions** section, choose **Site permissions**.

On the **Permissions** tab, in the Manage group, choose **Permission Levels**.

On the **Permission Levels** page, choose **Add a Permission Level**.

On the **Add a Permission Level** page provides the name and the description.

In the **Permissions area**, select the check boxes next to the list, site, and personal permissions that you want this permission level to include.

Click **Create**.

Discussion Boards:

This feature allows you to gather feedback and information from users of your site by starting topics and posting replies.

Creating and using a Discussion Board:

Discussion board provides a forum where users can converse about topics related to a particular project.

Using Discussion Boards we can start new discussions, sort and filter existing discussions.

1. From the Quick Launch bar, click **Discussions**.
2. Select **Create**
3. Select **Discussion Board** under Communications
4. Enter the name, description and if you would like it displayed on the Quick Launch. Next, click **Create**.
5. The Discussion Board is now displayed on the Quick Launch under Discussions.

Check-In and Check-Out:

By **checking out** an item or a file, a user can prevent others from editing that content.

By **checking in** the item, the user can allow others to edit the content, without needing to worry about overriding changes that others have made.

What is Versioning?

Versioning allows updates, restoring and tracking of the items in a list or in a library when they are changed. Versioning makes use of version numbers to keep track of changes.

To enable versioning:

1. From the document you want to enable versioning for, select **Settings > Document Library Settings**.
2. From the Customize Shared Documents page, select **Versioning settings**.

3. On the Document Library Versioning Settings page, set the parameters as appropriate for your needs and click **ok**.

What are Communities?

Formally known as Collaboration. The ability to easily access expertise and interact with other people in new and creative ways across the enterprise through both formal and informal networks.

Content Pages:

Content pages implement a master page. Content pages contain an attribute, which informs the compiler that the page should be merged with a master page. This attribute is part of the page directive tag called the Master Page File.

Site:

Site is a collection of web pages used to store information in an organized manner.

It stores a list of documents, discussions, events, tasks, and many other types of information.

Site provides controlled access to share information among users, i.e. authorize users are allowed to access the site & its elements

Site Collection:

SharePoint site collection is a logical grouping of multiple SharePoint site or hierarchical site structure. For e.g. Sites of various teams or departments of an organization can be grouped logically in one site collection.

Create a New Site in SharePoint 2010:

Click on the **Site Actions** menu and then click **New Site**.

Type a **Title** and **URL name** for the Site.

Under **Template Selection**, select a site template.

Choose any other options you want to specify, and then click **Create**.

Site Template in SharePoint:

In addition to the default **templates**, you can create your own **site template** based on a **site** you've created and customized in **SharePoint**.

This is a powerful feature in **SharePoint** that allows you to create a custom solution and then share that solution with your peers, the broader organization, or outside organizations.

Site in SharePoint:

SharePoint Site is a website that contains different **SharePoint** Web Parts like Document Library, Calendar, Task List, etc.

SharePoint sites can have 1 or more pages to display content to the user.

SharePoint Site Collection, just as the name implies, is a collection of **SharePoint** Sites.

Co-authoring documents:

Two or more users can edit a Word document or PowerPoint presentation at the same time. This new feature enables you to read and write portions of a file stored in SharePoint.

For example, you can work on one paragraph in a Word document while a colleague works on another paragraph in the same document and at the same time.

What can we do with a Site Template?

Saving a site as a template is a powerful feature because it offers so many uses of custom sites. Here are the immediate benefits you get from saving a site as a template:

- **Deploy solutions immediately** Save and activate the template in the solutions gallery and let other employees create new sites from this template. They can select it, and then create a new site from it, which will inherit the components of the site, its structure, workflows, and more. In short, just save the site as a template, activate it, and off you go.
- **Portability** In addition to deploying a custom solution in your environment, you can download the .wsp (Web Solution Package) file, take it on the road, and deploy it in another SharePoint environment. All of your site customization is conveniently stored in one file.

- **Extensibility** As a Web Solution Package, you can open your customized site in Visual Studio, perform additional development customization to the template, and then deploy it to SharePoint. As a result, site development can go through a solution life cycle (develop, stage, and put into production).

Saving a site as a template:

- Open your site in SharePoint Designer 2010.
- On the **Site** tab, in the **Manage** group, click **Save as Template**.
- This takes you to the **Save as Template** page in SharePoint.
- Specify a name to use for the template file in the **File name** field.
- Specify a name and description for the template in the **Template name** and **Template description** fields.
- To include the content of the site in the site template, check the **Include Content** box.
- Click **OK** to save the template.
- If all of the components on the site are valid, the template is built, and you see a message that says **Operation Completed Successfully**.
- To download or activate the solution from the solution gallery, click the **user solution gallery** link and follow the steps in the procedure below.
- Or, to return to your site, click **OK**.

Create a new Team Site:

From the Parent Team Site click **Site Actions** and choose **New Site**

Choose **Team Site** and enter a suitable **Title** and **URL** in the spaces provided and click **More Options**.

Decide you want to use **unique permissions** or whether you want to use the **same permissions as parent site** and click on the relevant radio button.

Decide whether you want to use the top link bar from the parent site. Please note: it is recommended that you click **Yes** at this point to enable user friendly navigation.

Click **Create**.

Create a blog:

1. Click **Site Actions**, and then click **New Site**.
2. In the **Create** dialog box, click the **Blog** site template.
3. In the **Title** box, type a name for your blog site.
4. The title appears in the navigation for every page in the site, such as the top link bar.
5. In the **URL name** box, type the last part of the Web address that you want to use for your blog site.
6. Do one of the following:
 - To quickly create your blog according to the default settings, including the same permissions as the parent site, click **Create**.
 - To customize some of the site settings, such as set unique permissions or change whether the site appears in the Quick Launch or the top link bar, select **More Options**.
- I. In the **Permissions** section, do one of the following:
 - a. If you want to use the same permission and groups as the parent site, click **Use same permissions as parent site**.
 - b. If you want to set up unique permission for the blog, click **Use unique permissions**. If you select unique permissions, you'll have an opportunity to set up permissions after you finish entering the settings on the current page.
- II. To display the top link bar from the parent site on pages in your blog, click **yes** in the **Navigation Inheritance** section.
- III. Click **Create**.

2. If the Set up Groups for this Site page appears, set up the visitors, members, and owners of the site.

Create and edit a wiki

A wiki is a site that is designed for groups of people to quickly capture and share ideas by creating simple pages and linking them together.

Your organization can use a wiki for a variety of uses. On a large scale, you can share large volumes of information in an Enterprise wiki. On a smaller scale, you can use a team site as a wiki to gather and share ideas quickly about a project.

Create a wiki page library

By default, a team site is a wiki.

- On the site where you want to create the wiki page library, click **Site Actions**, and then click **More Options**.
- In the **Create** dialog box, click **Wiki Page Library**.
- In the **Name** box, type a name for the library, such as **Wiki Pages**.
- Click **Create**.

Add a list or library to a Wiki page:

You can add other items to a wiki page, such as a tasks list to track action items or tasks related to the wiki. Later, you can choose whether or not the list or library appears on the Quick Launch for the wiki.

1. If you are not already editing the wiki page, click **Edit**.
2. Click where you want to insert the list or library.
3. Click the **Insert** tab on the ribbon, and then click **Existing List** or **New List**.
4. If you are inserting an existing list or library, under **Web Parts**, select the name of the list or library, and then click the **Add** button.
5. If you are inserting a new list, in the **Create List** dialog box, select the type of list or library you want to create, and then type a name for your list or library in the **List Title** box. The name is required.
6. Click **Create** to create the list or library and add it to the page.

Creating Alerts:

Alerts are the great way to keep track of changes your team mates make to documents.

To create an alert to a document library:

1. Open the SharePoint site where you want receive an alert.
2. On the Quick Launch bar, select tasks.
3. On the right of the title, click the drop-down menu, then select **Alert Me**.
4. On the New Alert page, select the criteria for which you want to be alerted and then click **Ok**.

So now, anytime a change is made to this item, you will immediately receive an email notification.