MODULE 1 Getting Started with SharePoint 2016

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Module Overview

This module explains to site collection and site administrators how to discuss basic terminology and how to navigate around SharePoint 2016. Once administrators can explain basic terminology and how to navigate around SharePoint, they have a solid foundation for the rest of the course.

After completing this module, students will be able to:

- Define SharePoint 2016 roles and terminology
- Navigate SharePoint 2016
- Utilize functions available in the Microsoft ribbon
- Create and add basic content to SharePoint

Lesson 1: Exploring SharePoint 2016 Site Collection and Site Administrator Roles

The purpose of the SharePoint 2016 Site Collection and Site Administration course is to explain two key roles in the SharePoint administration hierarchy: The SharePoint site collection administrator and the SharePoint site administrator. It will also help to determine who, within the organization, is best suited for these roles. Roles to consider include the following:

1. **IT personnel**: Small and medium-sized organizations with limited sites often have an IT individual function as the administrator at the site collection and site level.

2. **Business Analyst**: This combination IT/business role requires an individual with the knowledge to utilize the SharePoint technology and the understanding of how it can be incorporated into the business.

3. **Business User**: This individual works within the business unit and has specific knowledge of the wants, needs and pain points. Their technology skills can range from Office applications to being a technology power user.
The roles of the site collection administrator and site administrator are multi-faceted. Key responsibilities include:

- Identify the features of SharePoint 2016 and how they can benefit the organization.
- Manage the SharePoint 2016 site.
- Train SharePoint 2016 users how to navigate and utilize features within the site.
- Communicate with both the business unit and SharePoint 2016 IT administrators.

In order to fulfill these roles, a site administrator will need to continually learn and collaborate with other SharePoint site administrators. In the role, it is important to be a part of SharePoint user groups inside or outside of the organization.

Lesson 2: Defining SharePoint Terminology

There are a number of key terms used in various SharePoint discussions. To make sure that everyone has the same understanding of them, the following glossary is presented.

**Structural Terms**

These terms are used to discuss the structural components of SharePoint.

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Collection</td>
<td>The site collection is an administrative boundary that groups a number of sites into a single, managed unit. All sites in a site collection can share permissions, navigation and branding. Also, all sites in a site collection will begin with the same URL, which is the URL for both the site collection and the top level site.</td>
</tr>
<tr>
<td>Site</td>
<td>A site is a primary unit of administration. It is a container for lists and libraries, and provides the basic unit of administration for collaboration and communication. A site may be identified as either a top level site or a subsite, depending on its relative position within the site collection hierarchy.</td>
</tr>
<tr>
<td>Top Level Site</td>
<td>This is the top most site within a site collection. There can be only one top level site in each site collection as the top level site shares its URL with the site collection. All other sites in the site collection are subsites.</td>
</tr>
<tr>
<td>Subsite</td>
<td>A subsite is a child site within a site collection.</td>
</tr>
<tr>
<td>List</td>
<td>A list is a container for content. It is made up of items. Each item is made up of column data.</td>
</tr>
<tr>
<td>Library</td>
<td>A library is a special type of list where each item is a file with additional column data.</td>
</tr>
<tr>
<td>Page</td>
<td>A page is the main unit of presentation of information. A site can use different customized pages to present information to the users.</td>
</tr>
<tr>
<td>Web Part</td>
<td>A web part is a placeholder for content on a page. A web part may bring in data from a number of different sources, based on how the web part was built and configured.</td>
</tr>
<tr>
<td>Column</td>
<td>A column is additional information about a piece of data (i.e. date or author) in a list or library, also known as a SharePoint field or metadata.</td>
</tr>
<tr>
<td>Metadata</td>
<td>Metadata is additional information or “data about data” beyond the default properties configured in a list or library, also known as a SharePoint field or column.</td>
</tr>
<tr>
<td>Content Type</td>
<td>Content type is a reusable collection of metadata (columns), workflow, behavior and other settings for a category of items or documents in a SharePoint list or document library.</td>
</tr>
</tbody>
</table>

**Social Terms**

These terms are new to SharePoint 2016 and reflect the social direction in which the product is headed.

<table>
<thead>
<tr>
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</tr>
</thead>
</table>
### Module 1: Getting Started with SharePoint 2016

#### Term | Description
--- | ---
**Sharing** | Sharing is a kinder, gentler approach to permissions.
**Apps** | An app is a small, easy-to-use application that solves a specific end user or business need such as storing content or aggregating and displaying data. In SharePoint 2016, lists and libraries are considered to be apps.
**Following** | The ability to follow a site, document, list, person or tag. Following makes it easy to gain access to information accessed most frequently. Updates appear in the newsfeed.
**Community** | A community site is a new site template that provides a forum experience in the SharePoint environment. Administrators use communities to categorize and cultivate discussions among a broad group of people across organizations in a company.

The following diagram illustrates the relationship between the structural components of SharePoint 2016.

**Structural Components of SharePoint**

The boxes, surrounding the site collections and subsites, represent natural borders for functionality and security. Companies often have multiple site collections in order to control database size as well as add a layer of protection around content. However, features within SharePoint 2016 allow for sharing of content between site collections and sites without compromising security.

**Lesson 3: Navigating a SharePoint Site**

There are a number of navigational elements in SharePoint with which a site administrator must be familiar. Using these names consistently will help administrators and users develop a working vocabulary for support calls or other assistance provided. The following screenshot highlights them:
Lesson 4: Interacting with the Ribbon

The ribbon is a context-sensitive control across the top of the page, which adapts to the current activity of the user. Different options appear in the ribbon for the user depending on the current focus in the browser. For example, when looking at a Calendar list, the ribbon will present two options: Event and Calendar. However, when looking at a Library, those options will be replaced with Document and Library. The following table outlines some of the different ribbon tabs that users may encounter:

<table>
<thead>
<tr>
<th>Ribbon Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Browse</td>
<td>The Browse tab hides the ribbon tools to reveal the global navigation (i.e. top link bar).</td>
</tr>
<tr>
<td>(2) Page</td>
<td>The Page tab provides tools for managing the pages on a site.</td>
</tr>
<tr>
<td>(3) Format Text</td>
<td>The Format Text tab is available while editing a page; it provides the basic formatting and page layout tools.</td>
</tr>
<tr>
<td>(4) Insert</td>
<td>The Insert tab allows objects to be inserted on the page currently being edited.</td>
</tr>
<tr>
<td>(5) Web Part</td>
<td>The Web Part tab is available when a web part is selected on a page; it gives access to settings for the web part.</td>
</tr>
</tbody>
</table>
Ribbon – Page Tab

Ribbon – Page Editing Tabs

<table>
<thead>
<tr>
<th>Ribbon Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>(6) Files</td>
<td>Similar to the Items tab, the Files tab provides additional tools for interacting with documents.</td>
</tr>
<tr>
<td>(7) Library</td>
<td>Similar to the List tab, the Library tab is used for managing the library.</td>
</tr>
<tr>
<td>(8) Items</td>
<td>The Items tab provides tools for managing the items on a list.</td>
</tr>
<tr>
<td>(9) List</td>
<td>The List tab provides tools for managing the list itself.</td>
</tr>
<tr>
<td>(10) Events</td>
<td>Virtually identical to the Items ribbon, the Events tab reflects the emphasis on the calendar.</td>
</tr>
<tr>
<td>(11) Calendar</td>
<td>Similar to the List tab, the Calendar tab provides tools for managing the calendar.</td>
</tr>
</tbody>
</table>

Ribbon – Files and Library Tabs
Lesson 5: Creating and Editing Basic Content

The foundation of SharePoint is the ability to organize, store and share all types of content including documents, images and videos. The process of moving that content into SharePoint 2016 varies. This lesson covers moving and creating new content within SharePoint 2016.

Adding Content to SharePoint

There are many ways to add content to a SharePoint 2016 document library. Some of the most common ways include uploading a single item from a local computer or network share, or by simply dragging and dropping a file using a web browser.

The types of files that can be stored in SharePoint 2016 include, but are not limited to:

- Office documents
- Multimedia files, including images, video and audio
- PDF
- XML

Browser Differences

When adding content to a SharePoint library, slightly different dialog boxes may appear depending on the browser that you use. For instance, when uploading a document using Internet Explorer, you may get the following dialog box:
Adding a Document through IE

Accessing the same feature in Google Chrome, however, yields a slightly different dialog box:

Adding a Document through Chrome

Uploading a Document

1. Navigate to the desired library.
2. Click the upload link.
Working with documents in a Document Library

3. In the dialog window, click the **Browse** button and select the desired document, then click **OK**.

Adding a document

New in 2016 the ability to use Ctrl-Click and Shift-Click methods of selecting multiple documents at once.

Another way to access the same dialog box, in order to upload a document, is through the following steps:

1. Navigate to the desired library.

2. Click **Files > Upload Document** from the ribbon.
Dragging and Dropping Files

SharePoint 2016 has the ability to drag and drop files for upload to a document library. Provided that a compatible browser and other prerequisites are in place, files can be uploaded by simply dragging them to the designated area on the library page.

1. Restore the browser window from full screen to a smaller window in order to be able to view the desktop.

2. Locate the files on the desktop, local drive or network share that need to be moved into SharePoint.

3. Click the file(s) that need to be moved into SharePoint.

4. While the right mouse button is still held down, drag the files into the browser window containing the SharePoint document library and position the mouse over the text **drag files here to upload**.

5. Release the mouse to drop the files into the library.

6. The status indicator bar indicates when the files have been successfully added to SharePoint.

Creating a New Document from SharePoint

Loading content into SharePoint does require an extra step to upload the file. An alternative option is to create new documents within SharePoint. This approach offers several benefits including the automatic association of the file...
to the document library upon saving and association of content type columns also known as metadata. Every list and library has an associated content type. If multiple content types are associated with a particular library, a drop-down menu with multiple options will be available.

We will discuss content types in Module 3: Creating Consistency across Sites.

1. Navigate to the desired library.
3. Edit the document and click File > Save As to save the document back into the originating document library.

Creating a new document from SharePoint

Editing a Document from SharePoint

Once files are stored in SharePoint, any changes made to a file opened within SharePoint are saved automatically to the file stored in SharePoint.

1. Navigate to the file to be edited.
2. Click the Open Menu icon to open the document properties window.
3. Click Open to launch the file in the native client application.
4. Author the changes within Microsoft Office and save the file to write the changes back to SharePoint.

OR

1. Navigate to the file to be edited.
2. Click the file name to open the document in the native client application.
3. Author the changes within Microsoft Office and save the file to write the changes back to SharePoint.

Viewing or Editing Document Properties

Once files are stored in SharePoint, the document properties may need to be added or adjusted.

1. Navigate to the file to be edited.
2. Click the **Open Menu** icon to open the document properties window.

3. Click the next **Open Menu** icon to expand a secondary menu.

4. Click **Properties** to see additional information about this file.

5. Click the **Save** button to update and close the document properties page.

![Accessing document properties](image)

**Accessing document properties**

Users select the **Properties** option from the open menu to view the additional information.

Another way to view or edit document properties is by using the Microsoft ribbon:

1. Navigate to the desired library.
2. Click the checkmark icon next to the file name.
3. Click **Files > Edit Properties** to launch the same properties window for the selected file.
Editing document properties from the Ribbon

Users can only view the properties of one document at a time.

SharePoint Recycle Bin

SharePoint 2016 has a built-in recycle bin that stores any files, items, libraries, lists or sites that have been deleted. The length of time the item stays in the recycle bin is 30 days is configurable by the SharePoint server administrator. A secondary recycle bin, at the root of the site collection, captures items deleted from the first stage recycle bin.

Only site collection administrators can view items in the second stage recycle bin. This is also called the Site Collection Recycle Bin. This recycle bin has an added column to show who deleted the content in addition to when it was deleted.

Deleting an Item

1. Navigate to the item to be deleted from SharePoint.
2. Click the Open Menu icon to view the document preview.
3. Click the secondary Open Menu icon to expand the additional menu.
4. Click Delete from the drop-down menu.

Restoring an Item

When an item is deleted, it is moved to the site level recycle bin that is relative to the original location of the file.

1. Navigate to the site where the file originated.
2. Click the Settings icon.
3. Click Site contents.

![Image of SharePoint Site contents]

Accessing site contents to find the Recycle Bin

4. Click Recycle Bin in the heading.

5. Click the box next to the item to select the file(s).

6. Click Restore Selection to restore the item back to the original location, or click Delete Selection to remove them from this recycle bin.

![Image of SharePoint Recycle Bin]

Viewing the contents of the Recycle bin

7. Click OK to confirm.

Accessing the Site Collection Recycle Bin

1. Navigate to the top level site for the Site Collection.

2. Click Settings > Site Settings.

3. Click Recycle Bin under the Site Collection Administration section.

4. Click one or more items and click Restore Selection or Delete Selection.

5. Click OK to confirm.
Working with documents in SharePoint Online

For those using SharePoint Online, organizations have the option of using a streamlined list and library experience (simply called the New List and Library experience) or using a classic experience. SharePoint administrators can force the usage of one of these experiences using the SharePoint Online Admin Center.

Features not available in the New Experience

To effectively streamline the New experience, some functionality is removed. These include:

- The Ribbon
- Export to Excel
- Connect to Outlook
- Edit List/Library functionality
• Tree View
• Metadata Navigation
• Totals in views

To use this functionality, switch to the Classic Experience.

Switching to the Classic Experience

To return to the Classic List and Library Experience, click the **Return to Classic SharePoint** link in the lower left of the SharePoint list or library.

Switching to the Classic experience