

Sharepoint 101

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*instruction*

# The Basics

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*provided by*

University Web Services

STUDENT GUIDE



## Module 1: An Introduction to SharePoint

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| Learning Objectives | <ul style="list-style-type: none"> <li>❖ Understand SharePoint</li> <li>❖ Sign in/out</li> <li>❖ Identify basic tools in the Ribbon</li> </ul> |
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## Module 2: Edit existing page

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| Learning Objectives | <ul style="list-style-type: none"> <li>❖ Initiate edit mode</li> <li>❖ Add, format text</li> <li>❖ Check In</li> <li>❖ Insert link</li> <li>❖ Insert image</li> <li>❖ Change page layout</li> <li>❖ Publish</li> </ul> |
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Break: 10 minutes

## Module 3: Create a page

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| Learning Objectives | <ul style="list-style-type: none"> <li>❖ Create a page</li> <li>❖ Skill Check <ul style="list-style-type: none"> <li>- Add, format text</li> <li>- Add a link</li> <li>- Add an image</li> <li>- Change page layout</li> <li>- Check in</li> <li>- Publish</li> </ul> </li> </ul> |
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## Module 4: Create a new site

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| Learning Objectives | <ul style="list-style-type: none"> <li>❖ Create a new site</li> </ul> |
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## Module 5: Edit new site

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| Learning Objectives | <ul style="list-style-type: none"> <li>❖ Skill Check <ul style="list-style-type: none"> <li>- Create pages</li> <li>- Add, format text</li> <li>- Add a link</li> <li>- Add an image</li> <li>- Change page layout</li> <li>- Check in</li> <li>- Publish</li> </ul> </li> </ul> |
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## Module 6: View Manage Content and Structure

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| Learning Objective | <ul style="list-style-type: none"> <li>❖ View manage content and structure</li> </ul> |
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## Additional SharePoint topics and learning opportunities



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# Module 1: An Introduction to SharePoint

## What is SharePoint?

SharePoint is a web application that is part of the integrated suite of technologies from Microsoft referred to as the “Office System,” which includes other common applications such as Word, Excel, PowerPoint and Outlook, to name a few. If you’ve spent time in the 2007 or 2010 versions of any of these other Microsoft applications, you will see a lot of similarities in the layout and design, and hopefully will be a bit more comfortable with the functionality right from the start.

Unlike the other applications in the Office System, SharePoint 2010 is a web-based application, so you don’t need any additional software installed on your computer. If you were given permission to update the website, and you have access to the internet, you are ready to go.

SharePoint is typically associated with web content management and document management systems. As a multi-purpose platform, the tool is used for a number of different purposes, like internal collaboration spaces, file management, and websites.

In this class, we focus on SharePoint’s website management functionality, which is how the University creates, updates, and maintains its web sites. Because you’re here, you’ve most likely been tapped as one of the lucky resources in your area to keep your web site maintained.

## What are the system recommendations for editing sites in SharePoint?

SharePoint Server 2010 supports several commonly used operating systems, web browsers, and internet speeds. However, certain system choices might cause some SharePoint Server 2010 functionality to be downgraded, limited, or available only through alternative steps. In some cases, functionality might be unavailable for noncritical administrative tasks.

For the best experience editing your web pages in SharePoint 2010, note the following system requirements:

- **Operating system:** Windows 7 will provide the best experience
  - Windows Vista and XP can be used, but some functionality may be downgraded, limited, or only available through alternative steps.
  - Macs can also be used, but some functionality may be downgraded, limited, or only available through alternative steps. Additionally, some functionality will not be usable at all.
- **Web browser:** Internet Explorer 8 and 9 will provide the best experience
  - Internet Explorer 6 and earlier versions should not be used; functionality will be seriously downgraded.
  - Firefox and Safari can be used, but some functionality may be downgraded, limited, or only available through alternative steps.
- **Internet Speed:** High-speed internet via LAN will provide the best experience
  - Web performance and response time will be seriously downgraded if a dial-up service is used.
  - Wireless can be used, but web performance and response time may be downgraded



To sign in to SharePoint, you need to use an internet browser. SharePoint will work in most browsers (Internet Explorer, FireFox, Chrome, etc), but because it is a Microsoft product, SharePoint works the best in Internet Explorer (the Microsoft browser). If you use a different browser, although you will be able to update your web sites, you will run in to functionality issues.


 **Tip:** For the best editing experience in SharePoint, use [Internet Explorer](#) as your browser.

You must be granted permission to edit a SharePoint site. If you have not already been granted permissions to the web site you need to edit, contact the site owner for your site or [cuonlinehelp@ucdenver.edu](mailto:cuonlinehelp@ucdenver.edu) and request permissions.

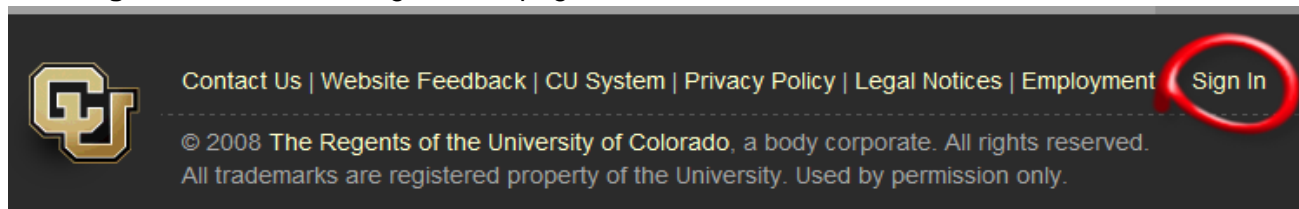
See the [Permissions job aid](#) for more information about permissions.

### To sign in to SharePoint

1. Open an internet browser and navigate to the university site you will edit. Always navigate to your site before attempting to sign-in


 **TIP:** If you do not know the web address for the site you will be editing, you can search for it on the university's home page at <http://ucdenver.edu>.

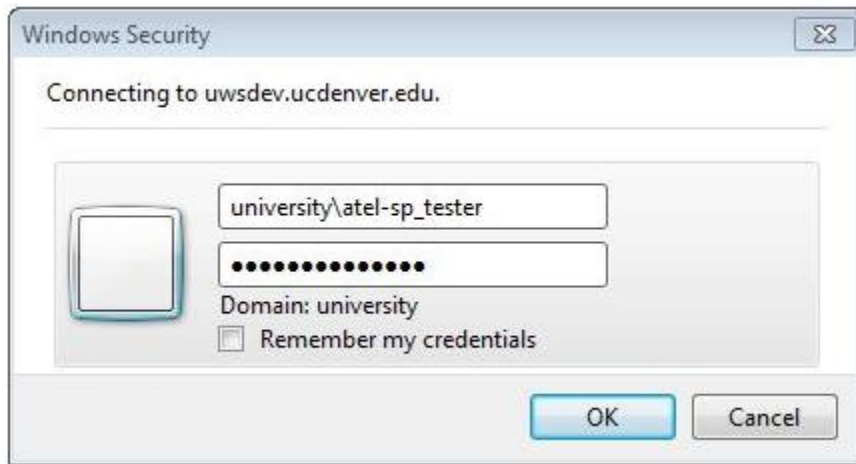
2. Click **Sign In** at the bottom, right of the page.



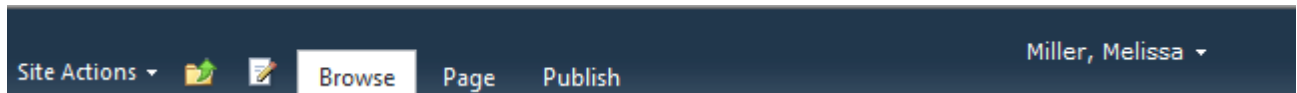
A SharePoint sign in window will appear.


3. Use your university user name and password to sign in
  - a. Type the word university, and then a back slash before your user name:  
e.g. **university\username**
  - b. Type your password
  - c. Click **OK**

 **NOTE:** You need to precede your user name with **university\** so the system recognizes you are on the university domain. Although there are some cases in which you can simply type your user name (for example, if you are on the network and have Windows 7, or if you are using Firefox or Chrome), a majority of SharePoint users must type university\ every time they log into SharePoint.



Once logged in, you will see the **Site Actions** menu in the upper left corner, and your name in the upper right.



 **NOTE:** If you do not have permissions, you will receive an error message. Please contact your site owner or [cuonlinehelp@ucdenver.edu](mailto:cuonlinehelp@ucdenver.edu).


### To sign out of SharePoint:

1. Click on your name in the upper or lower, right corner of the page, and then click **Sign Out**.

## Introduction to the ribbon

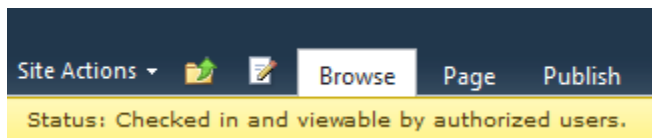
The ribbon is a command bar that organizes a program's features into a series of tabs at the top of a window. Using a ribbon increases discoverability of features and functions, enables quicker learning of the program as a whole, and makes users feel more in control of their experience with the program. A ribbon can replace both the traditional menu bar and toolbars<sup>1</sup>.



The ribbon's command interface brings many controls out from hiding and onto the page where they can do the most good. Similar to the user interface in products like Microsoft Word 2010, the ribbon is a toolbar that appears across the top of each page and displays many of the most commonly-used tools, controls, and commands.

 **TIP:** When you log in to SharePoint, the ribbon will be either *shown* or *hidden*. Either way, you will see the **Site Actions** menu in the upper, left of the page. To see the ribbon, click **Site Actions**, and then click **Show Ribbon**.

With the ribbon layout, you can quickly find the commands needed to complete the specific tasks you are working on. SharePoint has several menus, tabs, and groups of functionality for you to build your web site, but they are contextual, meaning content-specific functionality will appear in the ribbon depending on the tasks you are completing (determined by where your mouse is). For example, when in edit mode, if you click on an image, the **Picture Tools** menu appears in the ribbon.

The *shown* ribbon opens in the **Browse** tab, and initially looks like this:

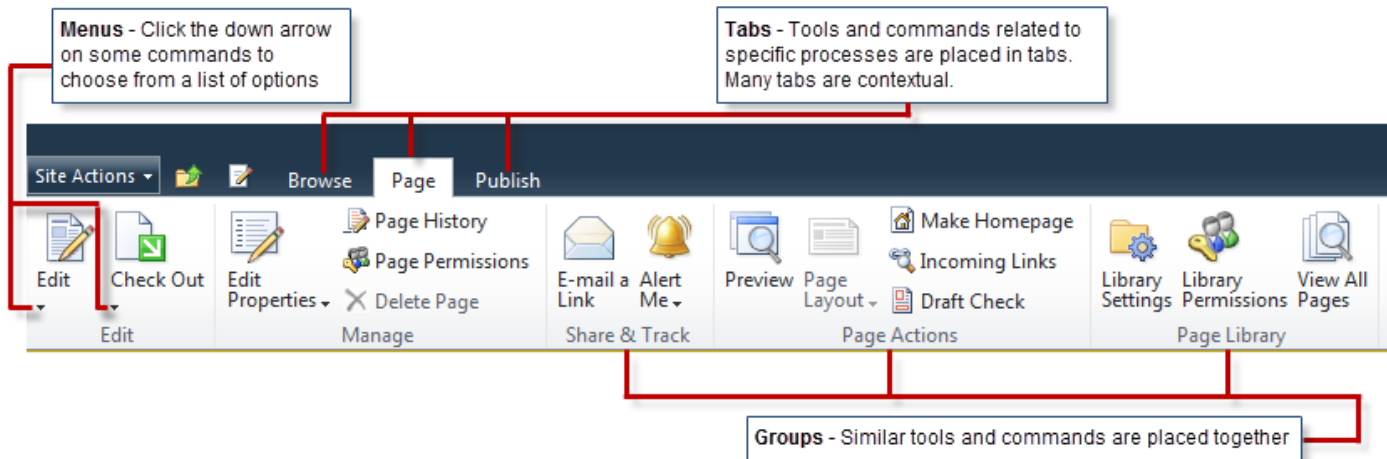


- **Site Actions** – Provides additional functions that may not appear in the ribbon, many of which are administrative functions of SharePoint. The options you see under **Site Actions** are directly related to your permission level.
-  **Navigate Up** – Provides a location view of the page you are on within the site files. You can click on this button at any time to see where you are in the site files, and easily move up levels in the site tree.
-  **Edit** – Initiates Edit Mode.
- **Browse** tab – Pages open with the **Browse** tab selected. The **Browse** tab has no ribbon-based tools associated with it, and essentially collapses the ribbon.
- **Page** tab – Tools and commands related to page management
- **Publish** tab – Command to publish and/or unpublish a page

When you click on a tab other than **Browse**, the ribbon for that tab opens. Within each tab, ribbon commands and controls are organized into groups. Each group contains functions related to a specific task.

Here is the ribbon expanded for the **Page** tab.

<sup>1</sup> <http://msdn.microsoft.com/en-us/library/cc872782.aspx>



There are several other contextual Menus, Tabs, and Groups that appear during your editing experience, specific to the tasks you are completing. Other tabs include, but are not limited to the following:

- **Editing Tools** tab
  - **Format Text** tab
  - **Insert** tab
- **Picture Tools** tab
- **Tables** tab
- **Web Parts** tab

### What if the feature in the ribbon is grayed out?

While the ribbon helps you quickly find the commands that you need to complete tasks, you may find that some of the commands on the ribbon are unavailable.

Some reasons why commands are disabled on the ribbon include the following:

- You do not have permission to work with specific features. For example, if you have the default Design permission level you cannot edit list items or documents and, therefore, any commands on the ribbon that pertain to editing list items or documents are unavailable.
- You need to select an item or object. For example, if you are working with a document library, you must first select a document in the library to enable many of the ribbon commands that enable you to work with the document.
- You may not have the appropriate client application installed. For example, the **Connect to Outlook** command requires that Microsoft Outlook be installed.


# Module 2:

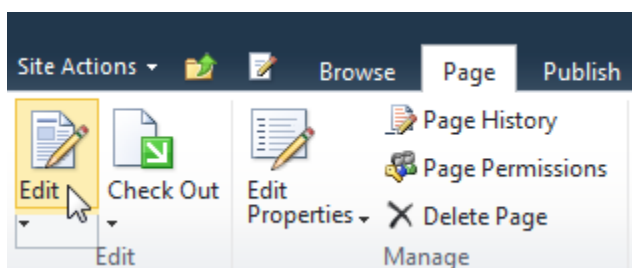
## Edit Existing Page

To initiate edit mode so you can make changes to a web page, you must first navigate to the page that needs editing. You can use either of the following actions to get to a specific page:

- Browse to the page using your internet browser
- If signed in, click **Site Actions**, and then click **Manage Content and Structure** to browse to the page using the windows explorer view

You can use any of the following three actions to initiate edit mode:

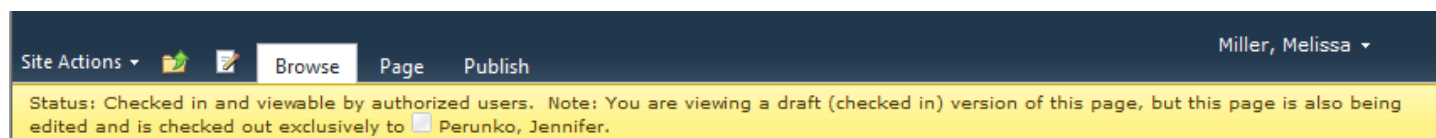
- In the ribbon, click the edit icon 
- Click **Site Actions**, **Edit Page**
- In the **Page** tab, **Edit** group, click **Edit**



**Edit** is different than **Edit Properties**, which is simply an administrative interface to a page. You can update some of your page content and attributes using the **Edit Properties** functionality, but the **Edit** functionality is the preferred, most user-friendly way to make simple changes to your web pages.

SharePoint automatically checks the page out to you when you initiate Edit Mode. Also, a yellow **Status** bar appears under the ribbon noting that the page is checked out and editable.

**EXCEPTION:** If the page is already checked-out to another user, the page will not go into Edit Mode, and will not be checked out to you. To avoid conflicts with multiple people working on the same page, only one user can edit a page at a time. The yellow **Status** bar will note that the page is already checked out, and will show the name of the user who is currently editing the page.

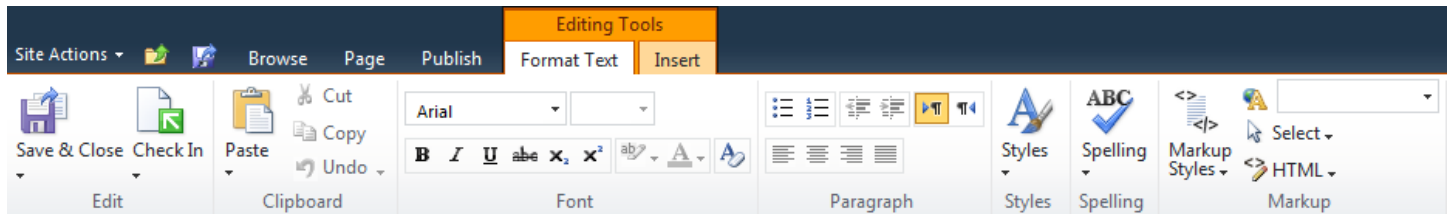


You'll notice Edit Mode looks different than the published view of the page. There are boxes for editing, zones for web parts, gray boxes for titles, etcetera. All the changes you make to your web pages will happen in this Edit Mode.

You'll also notice that a new tab opened in the ribbon, the **Editing Tools** tab, which holds both a **Format Text** and **Insert** tab. These new tabs hold the tools and commands you'll need to work with text, and insert objects in to your page.

## Editing Tools, Format Text tab

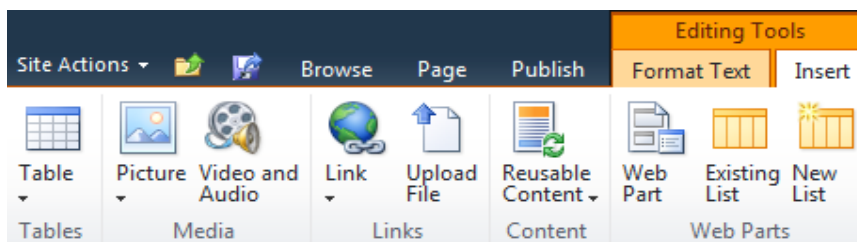
The **Format Text** tab is intended to offer tools to style text. CU Denver requires that certain brand guidelines be followed in regard to font and color. Please see the brand guidelines at <http://www.ucdenver.edu/brand>.



**NOTE:** The formatting tools should not be used to select font attributes--family, size, color and alignment. These characteristics are predetermined for you based on the CU brand, and should be selected through the **Markup Styles** functionality.

## Editing Tools, Insert tab

The **Insert** tab offers several different elements you can insert into your content areas. You can place tables, images, links, reusable content and various web parts, including special Video/Audio and List web parts.

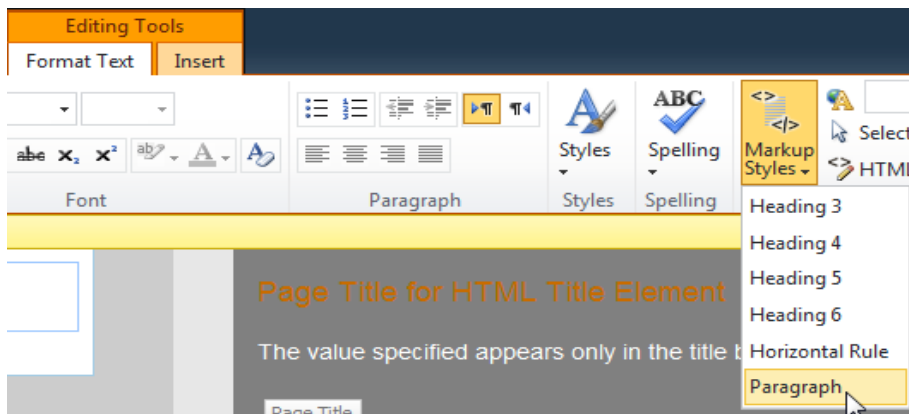


There are two basic ways to add text to your web pages. The first is to simply type text into the appropriate section of your web page. The second is by copying/pasting text from another application, such as Word or Outlook. It's very common that people copy/paste a majority of the text for their web sites from other sources.


When we copy/paste text from another application into SharePoint, there are a couple important steps we must take to ensure both that our text aligns to the university brand, and that we keep clean code on the back end of our web site.

To copy and paste text from another application into your web page:


1. In SharePoint, navigate to the page where you want to copy/paste text
2. In the **Page** tab, **Edit** group, click **Edit**
3. In the external application, copy the text you want to bring to your web page
  - a. Highlight text, right-click, and then click **Copy**
4. In SharePoint, **Page Content** zone, click to place your cursor where you want to add your text
5. Right-click, and then click **Paste** to add the text to your web page
6. Highlight the text you pasted
7. In **Editing Tools**, **Format Text** tab, click the drop-down arrow under **Markup Styles**, and then click **Paragraph**



The CU branded paragraph formatting is applied to the text you highlighted.

 **NOTE:** The CU branding styles are coded into these **Markup Styles**. You have several heading options, as well as a paragraph option. The standard formatting tools will be inactive, so you must use these **Markup Styles** to format the text on your pages.

8. In **Editing Tools**, **Format Text** tab, **Font** group, click the **Clear Format** button 

 **NOTE:** When you copy/paste text from other applications, SharePoint adds a bunch of unneeded code in the back end of your web pages. Using the Clear Format button on the text you brought over will clean up all that unneeded code in the back end. Although you won't notice a change in your text on the page, the code is a lot cleaner in the HTML view.

9. In the **Page** tab, **Edit** group, click **Check In** to create a permanent version of your changes



Checking in pages throughout the editing process is a critical step to web site maintenance in SharePoint. Not only does checking in your page enable other users to view your edits and/or make additional edits to the page, but it also creates a permanent record on the server that you can always restore if/when needed. Use **Check In** like you use **Save** in Microsoft Word – every time you make any changes to your page you do not want to lose, **Check In**.

👉 **NOTE:** SharePoint does have a **Save** option, which will save a local copy of your changes. Saving in SharePoint does not enable other users with permission to your web site to see your changes, and it does not create a permanent record on the server. If something happens to your system and you have only saved your work, you will lose all changes. Therefore, it is good practice to use **Check In** like you would **Save** in other applications, and to alleviate using the **Save** option in SharePoint altogether.

To check your page in:

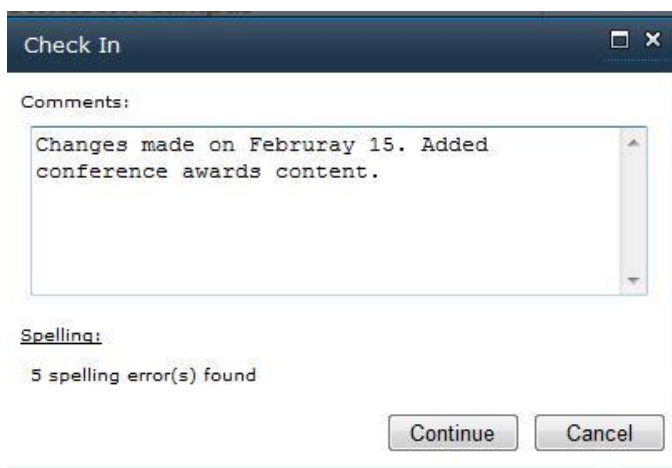
1. On the **Page** tab, **Edit** group, click **Check In**

👉 **NOTE:** **Check In** has a drop-down menu with additional options. Although you do not need to activate the drop-down menu to check your page in, you can **Discard Check Out** if you want to cancel your edits, and you can also **Override Check Out** if someone else has the page checked out and you need to edit the page.

The **Check In** window appears.

2. In the **Comments** field, type details about the changes you made to the page

👉 **NOTE:** Adding comments is good practice to keep a record of the changes being made to your pages; however, the field is optional. Comments are only seen by other users authorized to make changes to your site, not to the public.



Spell check runs during the **Check In** process and displays the number of spelling errors found. If no spelling errors are found, go to step 3. If spelling errors are found and you'd like to correct them before completing the **Check In** process, go to step 4.

3. Click **Continue** to complete the **Check In** process

OR

4. Click **Cancel**

The page will return to edit mode with spelling errors called out in red. In the **Page Headline** and **Page Subheadline** fields, spelling errors will be noted with the statement **Spelling Errors Found** in red next to the field title. In the **Page Content** section, spelling errors will be underlined in red, similar to other Microsoft applications.

Page Title **Spelling Errors Found**  
College of Agriculture


Page Headline **Spelling Errors Found**  
This is the home page for Agriculture

Page Subheadline  
Be more than a farmer

Zone 5  
Add a Web Part

Page Content  
This is a test of the text container on the page content for the agriculture page. Does this box work any better than the previous version of Microsoft Office SharePoint Server (MOSS). The first thing I notice that is different is that the toolbar is not visible. It is stuck to the top of the page. Can it be moved to float to the top of the browser window. how does the work

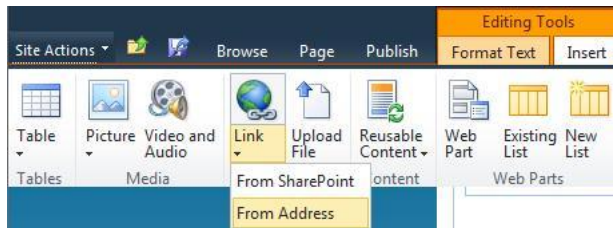
5. Correct spelling errors
  - a. Click **Spelling Errors Found** for errors in the **Page Headline** and **Page Subheadline** field, and then make corrections using the **Spell Checker** window
  - b. Click in the misspelled words in the **Page Content** section, and then type the correct spelling. The **Spell Checker** window does not appear for errors in the **Page Content** section.
6. On the **Page** tab, **Edit** group, click **Check In**, and then click **Continue** to complete the **Check In** process

 **NOTE:** At any time during page editing, you can check the spelling on your page: Put your cursor in text, and in **Editing Tools, Format Text** tab, click **Spelling**.


You can insert a link to several different objects in SharePoint, including web pages, documents, and images both within your SharePoint site files, and outside your web site.

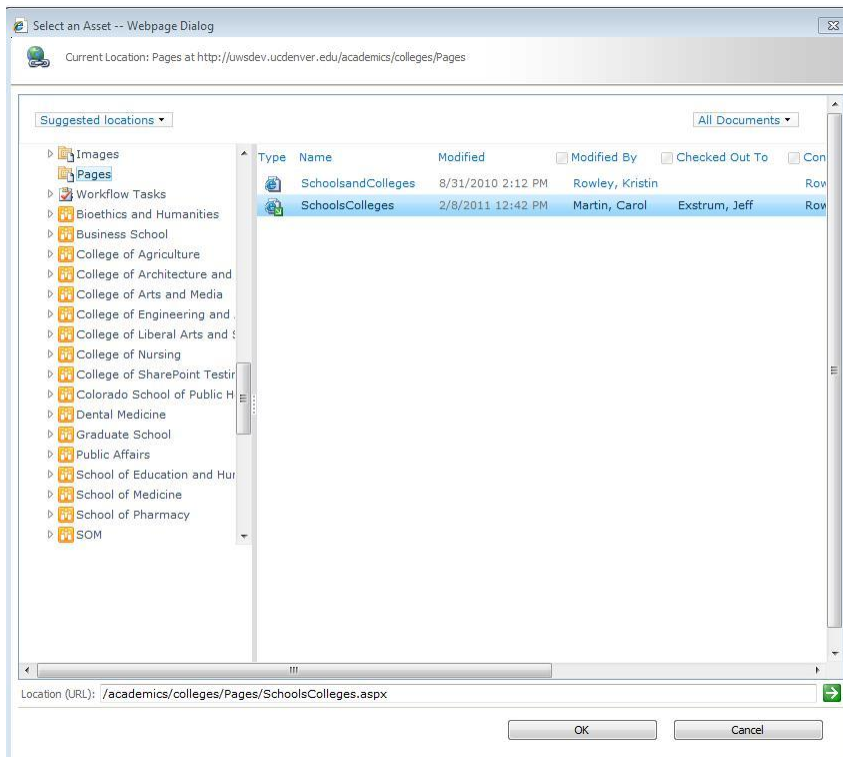
To insert a link in the content of your web site:

1. Navigate to the page where you want to insert the link
2. In the **Page** tab, **Edit** group, click **Edit**
3. Select the text you want to link
4. In **Editing Tools**, **Insert** tab, click the drop-down arrow below **Link**



5. From the **Link** menu, select either:  
**From SharePoint** to browse to an existing web page, image, or document in the SharePoint site files  
Go to step 6 to insert a link **From SharePoint**.  
or  
**From Address** to link to an external web page, image, or document  
Go to step 8 to insert a link **From Address**.
6. When **From SharePoint** is clicked, the **Select an Asset** window opens. Navigate to the file location for the web page, image, or document in which you want to link.

 **NOTE:** Source content (documents and/or images) must be uploaded to the appropriate folder in your site files and checked in before you link to it. If you have a new document to publish to your site, See [How to Upload an Image or Document](http://www.ucdenver.edu/sharepoint) at [www.ucdenver.edu/sharepoint](http://www.ucdenver.edu/sharepoint) to ensure the document is correctly added to your SharePoint files prior to building your link.



- Click on the source file you want to link to, and then click **OK**. SharePoint inserts a link to the internal file you chose, and the text you highlighted is formatted like a live link. Go to step 10.

**NOTE:** The file **From SharePoint** you link to must be uploaded to a folder in SharePoint site files and checked-in before users can access the link. Most documents already in the site files are ready to go, but if you want to link to a *new* document or image, you must upload and check-in the file for the link to work.


- When **From Address** is clicked, the **Insert Hyperlink** window opens. The text you highlighted in step three appears in the **Text to display** field. Type or copy and paste the web address into the **Address** field.

**NOTE:** You can also link to an e-mail address using the **Insert Hyperlink** window. Type <mailto:> followed by an e-mail address, with no spaces. For example, <mailto:sharepointuser@ucdenver.edu>.



- Click **OK**

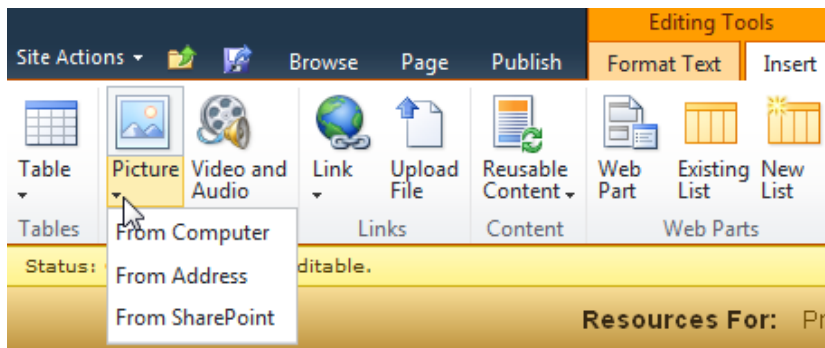
SharePoint inserts a link to the external web address you chose, and the text you highlighted is formatted like a live link.

10. Put your cursor on the new link, and then click the **Format** tab in **Link Tools**.  
**Link Tools** functionality appears in the ribbon.
11. In the **Properties** group, **Description** field, type a description for the link. For example, type “link to Google” if the link goes to [www.google.com](http://www.google.com).  
  
 **NOTE:** Adding text in the **Description** field not only enables SharePoint to display pop-up text when users hover over your link, but it is also essential to inform users with disabilities where the link will take them. Make it a habit to fill out the **Description** field for every link you insert.
12. In the **Page** tab, **Edit** group, click **Check In** to create a permanent version of your changes.

You can insert images into several different locations on the pages of your web site. Different templates and page layouts use different size pictures; there are style guides available to help you determine what size pictures go in which places.

To insert an image in the content of your web site:

1. Navigate to the page where you want to insert the image
2. In the **Page** tab, **Edit** group, click **Edit**
3. Place your cursor at the location in which you want to insert an image
4. In the **Editing Tools**, **Insert** tab, click the drop-down arrow below **Picture**

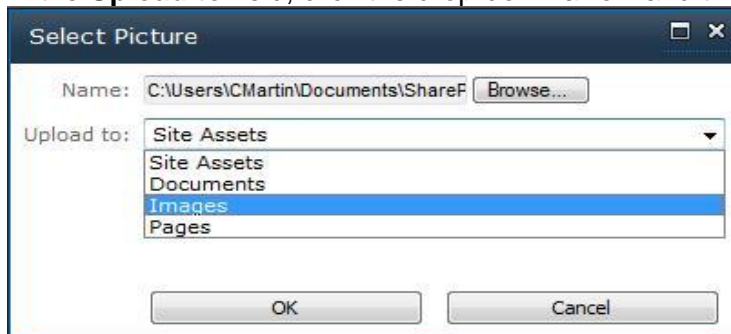


5. From the **Picture** menu, select one of the following:
  - a. **From Computer** to upload and insert a picture from your computer  
Go to step 6 to insert a picture **From Computer**
  - b. **From Address** to link to an image on an external web site  
Go to step 11 to insert a picture **From Address**
  - c. **From SharePoint** to browse to an existing image in the SharePoint site files  
Go to step 13 to insert a picture **From SharePoint**

6. When **From Computer** is clicked, the **Select Picture** window opens. Click **Browse** to locate the image you want to insert.

The **Choose File to Upload** window opens.

7. Click on the picture you want to insert, and then click **Open**
8. In the **Upload to** field, click the drop-down arrow and then click **Images**



9. Click **OK**

The **Documents** window opens

10. Type a title for the image in the **Title** field, and then click **Save**. The title can be the same as the **Name**.

The image is inserted on the page in the location of your cursor.

Go to step 15

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11. When **From Address** is clicked, the **Select Picture** window opens. Type or copy and paste the web address of the external image into the **Address** field.

12. In the **Alternative text** field, type a short description of the image

**NOTE:** Adding text in the **Alternative text** field not only enables SharePoint to display pop-up text when users hover over your image, but it is also essential to describe the image to users with disabilities. Make it a habit to fill out the **Alternative text** field for every image you insert.

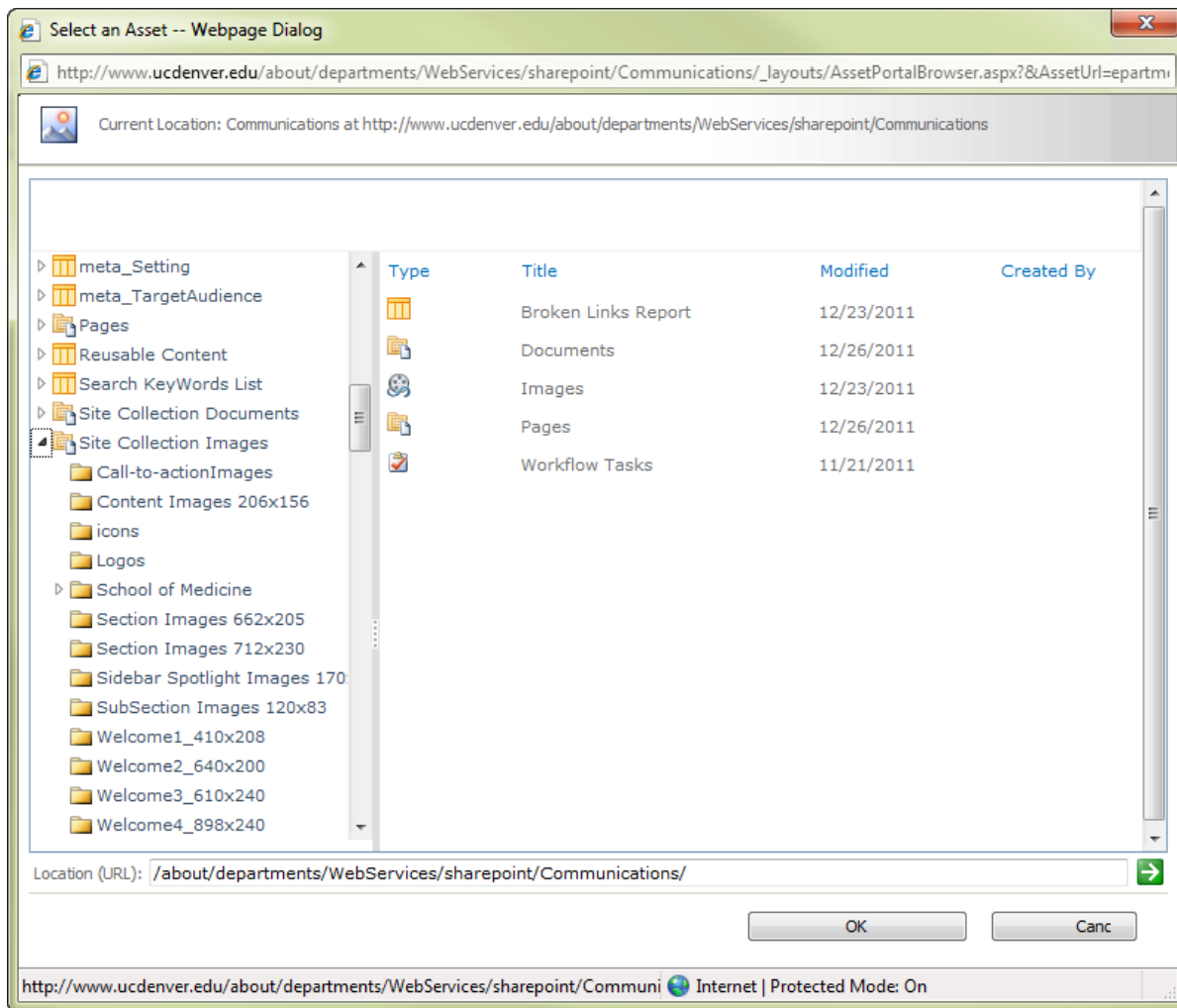
The image is inserted on the page in the location of your cursor.

Go to step 17

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13. When **From SharePoint** is clicked, the **Select an Asset** window opens. Navigate to the file location for the image you want to insert

You can select an image from your own site images folder (if you have images specific to your site), or you can use the university's image library. The university's image library is in a folder named **Site Collection Images**, and can be found in the windows folder view of the **Select an Asset** window.



Images are organized by size in the **Site Collection Images** folder. You can determine which size image you need by referring to the style guide for your school or department, if available.

14. Click on the picture you want to insert, and then click **OK**

The image is inserted on the page in the location of your cursor.

15. Put your cursor on the inserted picture to enable the **Picture Tools** tab

16. In the **Properties** group, **Alt Text** field, type a short description of the image

**NOTE:** Adding text in the **Alternative text** field is intended to describe the picture to the blind; it is essential to enable users with disabilities to understand the image on your page. Make it a habit to fill out the **Alternative text** field for every image you insert.

17. In **Picture Tools, Design** tab, click the drop-down arrow under **Image Styles**, and then click **Float Left** or **Float Right** to move your image left or right.



**TIPS:** You can make small adjustments to the size of your image by dragging the boxes that appear at the corners of your image. Use this functionality with caution, however, because the more you adjust the size of an image by dragging, the less clear it becomes.

If you create images in a graphics software application outside SharePoint, like Adobe Photoshop, Fireworks, Snagit, follow the style guide for your web pages and crop the image to the correct pixel size for the image container on the respective page layout.

You can also adjust the location of your image by dragging and dropping it to a different location on the page.

18. In the **Page** tab, **Edit** group, click **Check In** to create a permanent version of your changes.

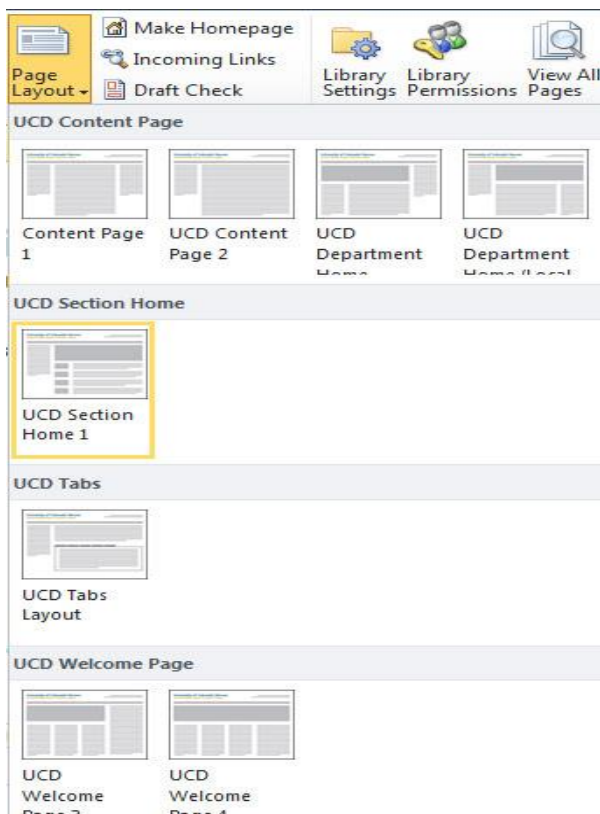
## Change Page Layout

There are several different page layouts you can choose from for each of your pages. Once your page is created, you can also quickly change to a different page layout if your content would work better in a different format.

Although page layouts vary slightly across the different themes used in the University, common pages include a 2-column page, and 3-column page, and a tabs page, to name a few. You can easily change between page layouts at any time.

To change your page layout:

1. Navigate to the page where you want to change the layout
2. In the **Page** tab, **Edit** group, click **Edit**
3. In the **Page** tab, **Page Actions** group, click the drop-down arrow under **Page Layout**  
A menu of available page layouts will open

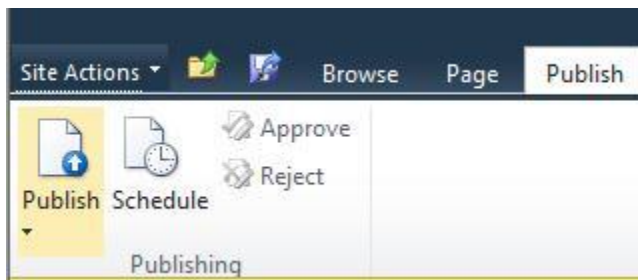


4. Click your desired page layout  
SharePoint will adjust your page to the new page layout.
5. In the **Page** tab, **Edit** group, click **Check In** to create a permanent version of your changes.


You must deliberately publish pages in your web site for them to become available for anonymous users on your public-facing web site.

To publish a page to your web site:

1. Navigate to the page you want to publish
2. In the **Publish** tab, click **Publish**



The page is published to your public-facing web site.

 **NOTE:** Web sites that are built on templates that require approval will not see publish as an option. You must first submit the workflow for approval.




# Module 3: Create a Page

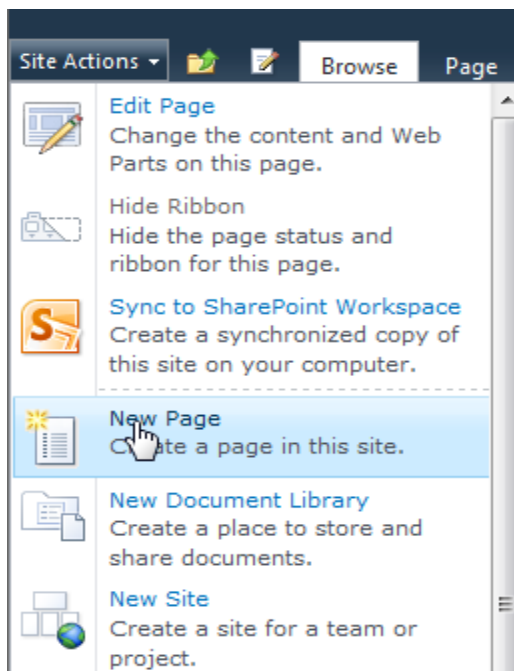
You can easily create new pages in your web site.

To create a new page:

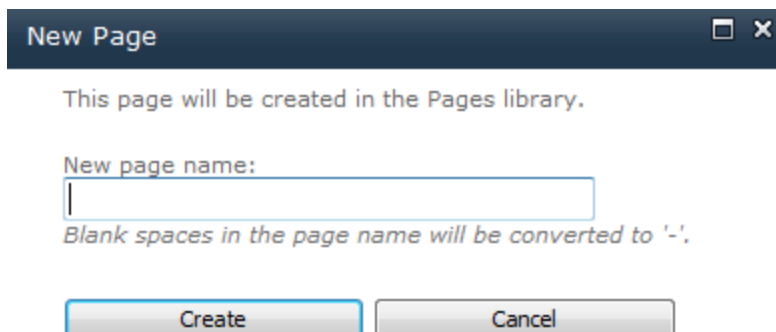
1. Navigate to the section of your web site in which you'd like to add the new page

 **NOTE:** SharePoint will add the new page to the section you are in when you complete this task. Make sure you are in the appropriate section before you move to step 2.


2. Click **Site Actions**, and then click **New Page**



The **New Page** window opens.




3. Type the name of your new page in the **New page name** field

 **TIP:** Name the page something short, concise, and logical to the page content. This text will be displayed in the URL as well as in the breadcrumbs and menus throughout your site.

The new page opens in Edit Mode.

4. Click **Create**

Your new page is created, and opens in Edit Mode.

 **NOTE:** The **Page Headline** and **Page Subheadline** fields are automatically populated on your new page. Make sure you replace the auto-populated text with the title and subtitle of your page or your new page will publish with “Page Headline” and “Page Subheadline” in the title sections.

 **TIP:** If you do not see your new page in the left navigation, refresh the page.





# Module 4: Create a New Site

Creating a site in SharePoint is synonymous with creating a new section. A site, or section, is like a container that holds multiple pages. You want to create a new site (section) in your web site whenever you need to add content that will span multiple pages.

Here are a few examples of when you might want to create a new site (section):

- You need a section for faculty and/or staff that includes a bio page for each person
- You need a section for academic programs or degrees, where each program and/or degree has its own page
- You need a section for grants and scholarships that includes a page for each grant/scholarship

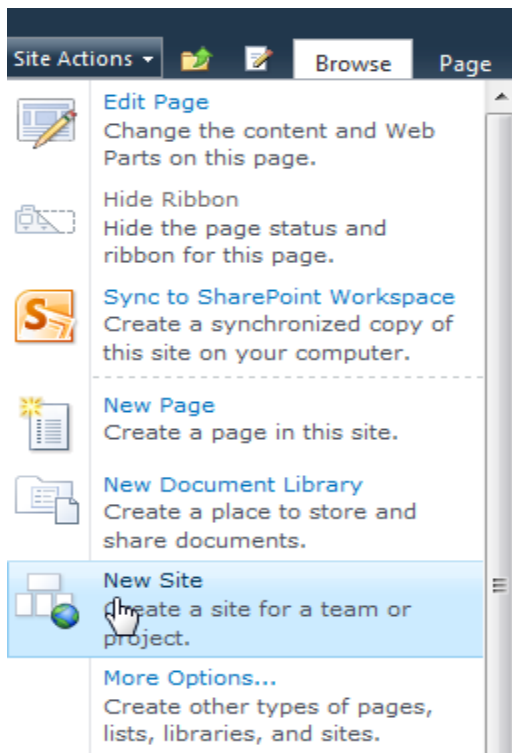
👉 **NOTE:** You must have a certain level of permission to be able to create a new site. If you need to make a new site, and do not see **New Site** as an option under **Site Actions** in the ribbon, contact your Site Owner or the CMS administrator.

To create a new site (section):

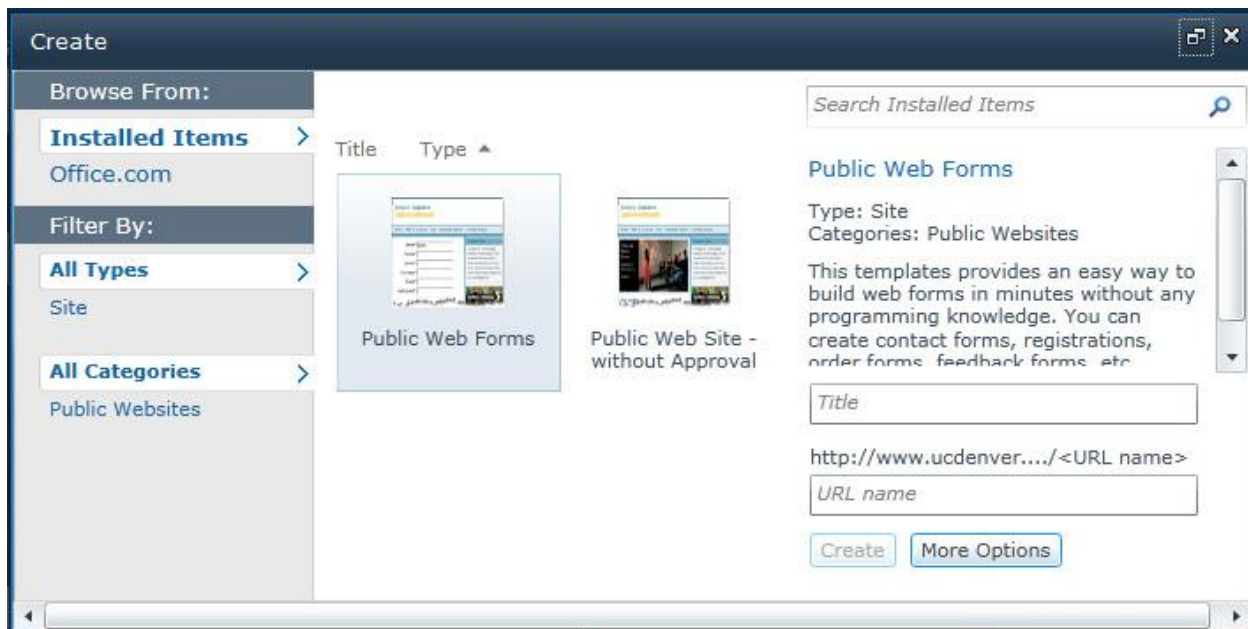
1. Navigate to the site (or section) under which you would like to add the new site.

👉 **NOTE:** SharePoint will add the new site to the site/section you are in when you complete this task. Make sure you are in the appropriate site/section before you move to step 2.

2. Click **Site Actions**, and then click **New Site**



The **Create** window opens.



3. Click **Public Web Site – without Approval** for your site template

👉 **NOTES:** **Public Web Site – without Approval** is the standard template for web pages. **Public Web Forms** is used specifically to create a form..

Depending on your current site template in use, you may see other options here as well. Another template, **Public Web Site – with Approval** was recently removed from the options as it creates a number of maintenance issues and constraints for users.

4. In the **Title** field, type a name for your new site.

👉 **NOTE:** The title is the site name that will display throughout the pages on your site, including in the navigation.

5. In the **URL name** field, type a URL name for the site.

👉 **NOTE:** The **URL name** is the text that will appear for that page in the web address. You can make this the same as the site title, or rename it to something that is short and easy to reference.

The **URL name** should be one word, and should not include spaces or special characters.


6. Click **Create**

SharePoint creates your new site, completing the tasks below (to name a few):

- a. Builds a default (home) page
- b. Builds navigation
- c. Sets up permissions
- d. Establishes a set of standard folders, including the following:
  - *Documents*: storage for all documents you upload and publish to your site
  - *Images*: storage for all images you upload and publish to your site
  - *Pages*: storage for all pages in your site
  - *Workflow Tasks*: not currently in use

The default page for your new site opens.

7. Click the **Publish** tab, and then click **Unpublish**

 **NOTE:** SharePoint automatically creates and publishes the home page of your new site. Make sure to **Unpublish** your new site immediately after you create it, or you will have a blank home page viewable to the public.

8. On your new site's home page, in the **Page** tab, click **Edit Properties**


9. Type the name of your page in the **Name** field

 **TIP:** The information you type into the Name field is displayed in the URL for your page.

10. Type the title of your page in the **Title** field

 **TIP:** The information you type into the **Title** field is displayed as the title on your published page.

11. Click **Save**

 **NOTE:** Your breadcrumbs will not be updated until you check in.

12. In the **Page** tab, click **Check In**

# Module 5:

## Edit New Site



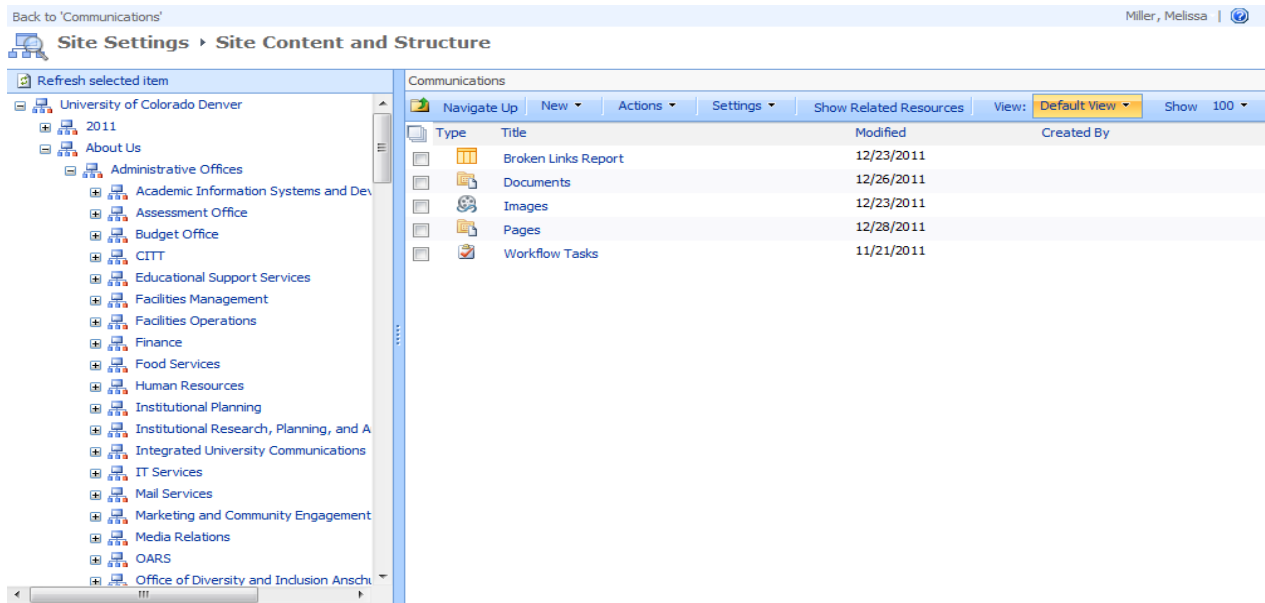
Module 6:  
View Manage Content and  
Structure

# View Manage Content and Structure

For the entirety of this class, we've been completing all our tasks through the front-end of the web site. There is also an administrative side, which is a windows explorer view of all our web sites. Many of the tasks you completed in the front-end view of the web site you can also complete in the administrative side.


To view the administrative side of the web site:

1. Click **Site Actions**, and then click **Manage Content and Structure**  
The administrative side of the web site appears.



## The View

The outline on the left side is the tree view of all the universities web sites. **University of Colorado Denver** is at the top, and all web sites are organized within the university site by category. Your web site is housed within these site files. Seeing the site files in this view gives provides a great picture of the larger web site, and how all the sites fit together.

 **NOTE:** Although you can see the entire structure of all the web sites for the university, it is likely you only have permission to view and/or edit the files within your web site.

The view on the right shows what is inside the folder highlighted on the right. Every site has a standard set of four folders – Documents, Images, Pages, and Workflow tasks – and then whatever else is added to the site by authorized users. Your site could have just those four folders, or a long list of folders, lists, etc.

Click on the folders in the left pane to view details about their content in the right.



## The Functionality

You can perform many of the same tasks we performed in the front-end view from this manage content and structure view. Most tasks can be performed both in the left pane, and in the right.

- Make new pages
  1. Navigate to the **Pages** folder in the site in which you want to add a page
  2. In the left pane, click the drop-down arrow next to **Pages**, click **New**, and then click **Page**  
**OR**
  2. In the right pane, click the drop-down arrow next to **New**, and then click **Page**


The **Create Page** window opens

3. Complete the form, and click **Create**

- Upload new images
  1. Navigate to the **Images** folder in the site in which you want to upload a new image
  2. In the left pane, click the drop-down arrow next to **Images**, click **New**, and then click **Item**  
**Or**
  2. In the right pane, click the drop-down arrow next to **New**, and then click **Image**

The **Upload Document** window opens

3. Browse for the image you want to upload, and then click **OK**


 **NOTE:** When you upload an image from this administrative view, you may have to publish the image before you can use it on your pages.

- a) In the right pane, click the check box to the left of the image file
- b) Click **Actions**, and then click **Publish**

- Upload new documents
  1. Navigate to the **Documents** folder in the site in which you want to upload a document
  2. In the left pane, click the drop-down arrow next to **Documents**, click **New**, and then click **Item**  
**OR**
  2. In the right pane, click the drop-down arrow next to **New**, and then click **Item**


The **Upload Document** window opens

3. Browse for the document you want to upload, and then click **OK**

 **NOTE:** When you upload a document from this administrative view, you will have to publish the document before you can use it on your pages

- a) In the right pane, click the check box to the left of the document file
- b) Click **Actions**, and then click **Publish**

- Check Out/In
  1. Navigate to the **Pages** folder in the site in which you want to check out/in a page
  2. In the right pane, click the check box to the left of the page
  3. Click **Actions**, and then click **Check Out** or **Check In**
  
- Publish
  1. Navigate to the **Pages** folder in the site in which you want to publish a page
  2. In the right pane, click the check box to the left of the page
  3. Click **Actions**, and then click **Publish**

 **NOTE:** To get back to the front-end GUI view, navigate to the **Pages** folder, and then click on any page.

# A Few Final Notes

# Additional SharePoint Topics and Learning Opportunities

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## Additional SharePoint Topics

We've made it through our course content for the SharePoint basics class. Here are a few additional SharePoint notes to leave you with, as well as contact information and availability for additional SharePoint learning opportunities.

A few extra notes ...

- You have a support system to help you with SharePoint. You can send an email to [cuonlinehelp@ucdenver.edu](mailto:cuonlinehelp@ucdenver.edu) at any time with questions, and we will be there to help you
  - Some schools and colleges have support staff specific to the school who are your first line of defense. Find out if the site you work on rolls up to an area that has additional support staff – and make them your new best friends ☺
- Open Labs are held at both the downtown and Anschutz Medical Campuses (AMC) to give you an opportunity to get help with questions specific to your site. Check the [Training Schedule](#) for specific location information.
  - Downtown: bi-weekly on Tuesday mornings
  - AMC: weekly on Wednesday mornings
- Abide by the Health Insurance Portability and Accountability Act (HIPAA) Privacy Rule and **never** publish any patient-related data on any university web site.
- Abide by the Family Educational Rights and Privacy Act (FERPA) and **never** publish any student record-related data on any university web site.
- **Never** publish any credit card information on any university web site.

## Additional SharePoint Training

A wealth of help information is posted on the University Web Services web site at [www.ucdenver.edu/sharepoint](http://www.ucdenver.edu/sharepoint), and the curriculum continues to grow.

- Check out the [Online Training](#) page for job aids specific to individual tasks regularly performed while updating your sites.
- Use the [Search by Topic](#) functionality to quickly locate a specific job aid
- Access the [Training Schedule](#) to view and register for more advanced SharePoint courses to learn more about the functionality of SharePoint.



