



University Information  
Technology Services

# Microsoft SharePoint 2016

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Introduction to SharePoint

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

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# University Information Technology Services

## Microsoft SharePoint 2016 Introduction to SharePoint

### Table of Contents

Introduction .....	5
Learning Objectives.....	5
Accessing a SharePoint Site .....	6
The Interface.....	7
The Ribbon .....	7
Quick Launch.....	8
Top Link Bar.....	8
Personal Menu .....	8
Creating a Site .....	9
Set Up Groups for this Site.....	12
Groups and Permissions .....	14
Default Permission Groups .....	14
Assigning Permission Levels.....	15
Modifying Site Permissions.....	16
Adding a User or Group to a Site .....	17
Modifying Permissions on a Site.....	20
Creating a Group.....	22
To check a group's full permissions:.....	26
Deleting a User from a Group.....	27
Your New Team Site.....	28
Working with Pages .....	29
Creating a Web Parts Site Page.....	29
Editing a Web Part Site Page.....	30
Checking Out a Page .....	30
Changing the Layout .....	31

Adding a Web Part to a Page Zone .....	32
Deleting a Web Part .....	36
Adding Individual Content Items .....	37
Saving a Page .....	39
Editing a Page After Initial Configuration .....	41
Working with Documents .....	42
Uploading Documents to a SharePoint Document Library.....	42
Creating a New Document in a SharePoint Document Library .....	45
Opening Documents in a SharePoint Document Library .....	47
Document Check Out.....	49
Document Check In.....	51
Maintaining Document Versions .....	54
Moving and Copying Documents.....	56
Moving Files into Folders.....	56
Moving Files from One Folder to Another.....	57
Copy Files from One Folder to Another .....	58
Using File Explorer to Move or Copy Between Libraries .....	59
Searching for Documents and Pages .....	61
Searching in a Site.....	61
Searching in a List or Library .....	63
Connecting a Calendar or List with Outlook.....	63
Additional Help .....	64

## **Introduction**

SharePoint is a Microsoft tool to create web sites to securely store, organize, share, and access information. Only those with whom you share your site can access the information; however, it can be accessed from virtually any device using a Web browser. This booklet was created using the Mozilla Firefox browser.

## **Learning Objectives**

After completing the instructions in this booklet, you will be able to:

- Accessing a SharePoint Site
- Become familiar with the Interface, Ribbon, Quick Launch, and Top Links
- Create a SharePoint site
- Manage site permissions
- Create, and format site pages and content
- Create and manage document libraries
- Search for content on your SharePoint site

## Accessing a SharePoint Site

The following describes how to access your SharePoint site(s):

1. In your preferred browser, navigate to **portal.office.com**.
2. Enter your **NetID@kennesaw.edu**; then **enter**.
3. The first time you access office.com, will be routed to enter your **NetID** and **Password**.
4. Click **SharePoint**.



Figure 1 - Office.com Site

5. All SharePoint sites that you are following and to which you have been granted access will be displayed. Click the **name** of the site you want to access.

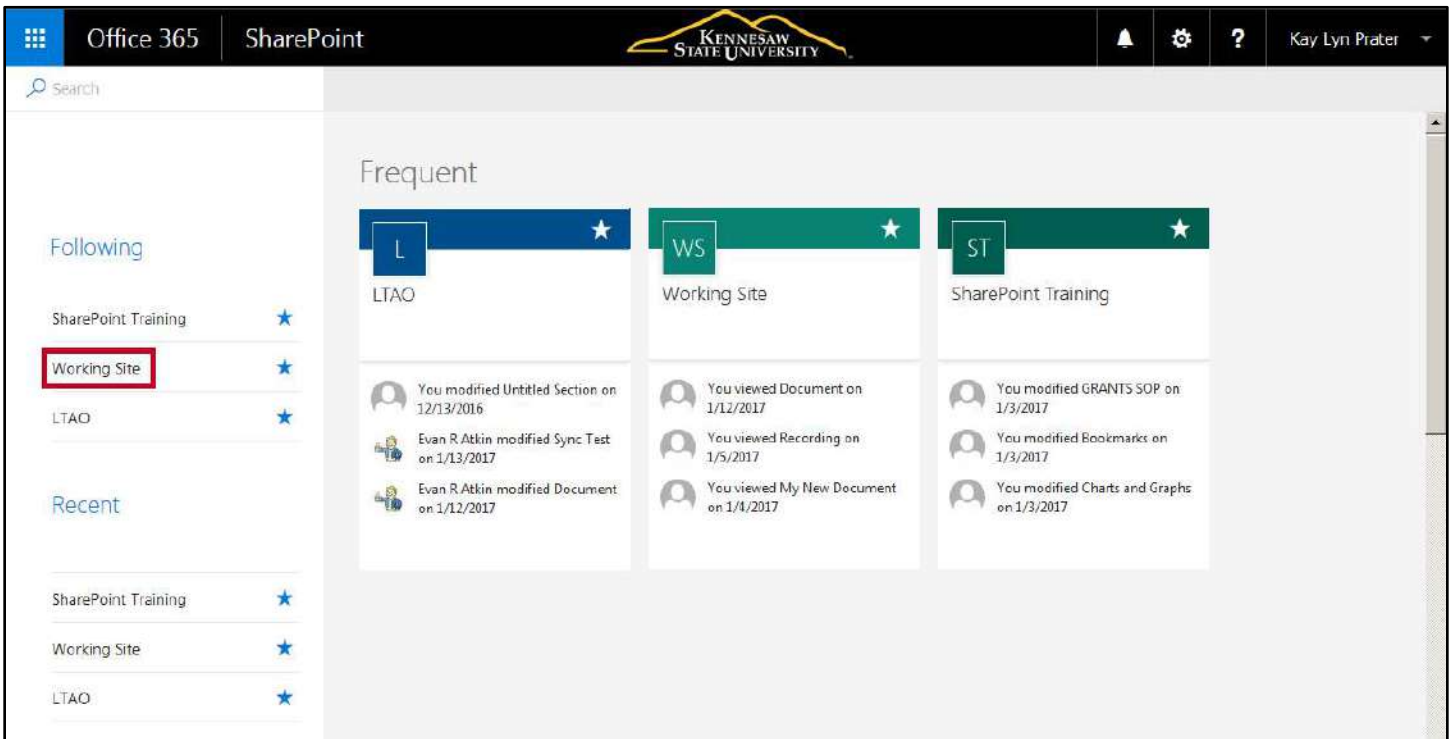


Figure 2 - Click the Site to Access

6. You will be routed to the site you selected.

# The Interface

The following describes the Office 2016 interface:

## The Ribbon

The Ribbon is a panel that contains functional groupings of buttons and drop-down lists organized by tabs. Each application in the Office Suite has a different set of tabs (with some tabs in common) that pertain to the functionality of that particular application. Each tab is further divided up into groups (of buttons), such as the *Edit* and *Manage* groups. The figure below shows the Ribbon as it looks when you are in your *Home* page.

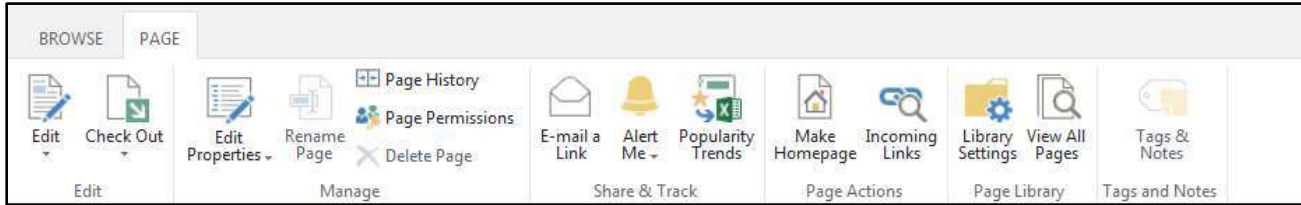


Figure 3 - The Ribbon

When you first access a page, library, etc., you are positioned on the **Browse** tab, which provides an overall view of the page or the list items. You can then click on one of the other tabs you are given to work with the page, such as *Page* on the *Home* page. The *Page* tab provides tools to add content and format the *Home* page.

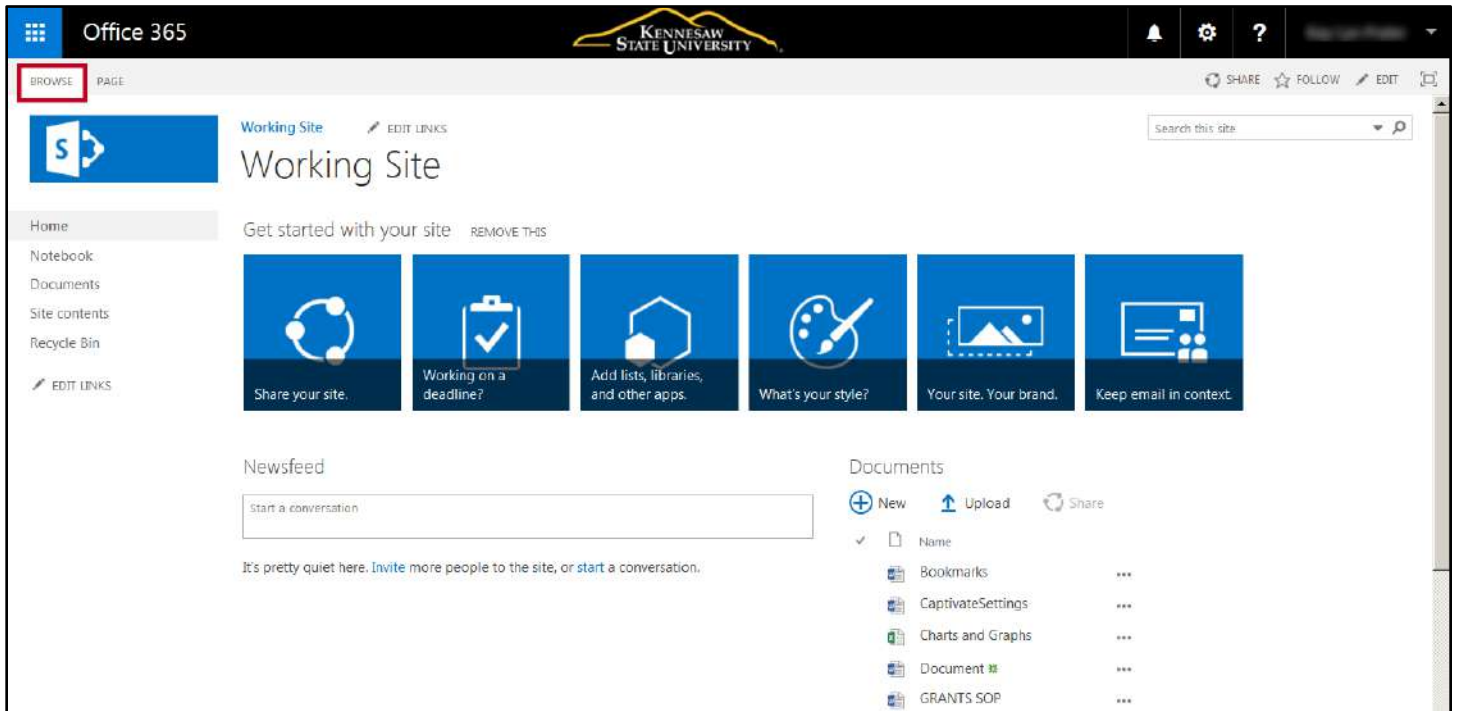


Figure 4 - Browse Tab

## Quick Launch

The **Quick Launch** menu is displayed on the left side of most SharePoint pages. It displays links to pages, libraries, and other various content on your site. You can customize *Quick Launch* by adding, removing, or reordering, links to suit your needs.

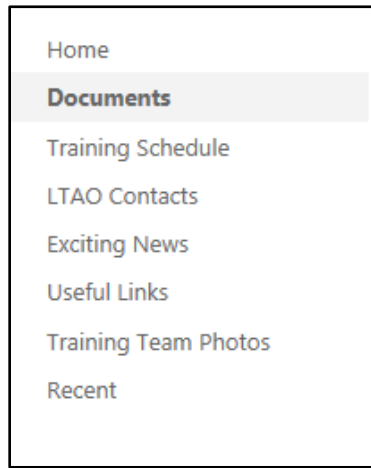


Figure 5 - Quick Launch

## Top Link Bar

The **Top Link Bar** contains links to your site *Home* page and allows access to other sites and subsites as configured by those in your organization with full control or design permissions.



Figure 6 - Top Link Bar

## Personal Menu

The **Personal Menu** is located at the top right of the screen. It is used to configure your settings (if the *My Site* feature is enabled by your administrator), activate the personalize page feature for various site content, display the shared view, and sign out of SharePoint.

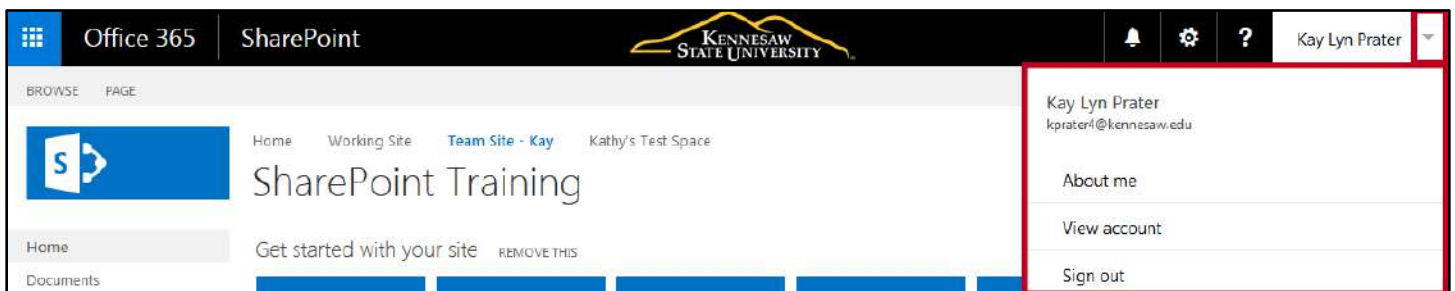


Figure 7 - Personal Menu



To sign out of SharePoint 2016:

1. Click the **drop-down arrow** in the *Personal* menu at the top right of the screen. This menu is indicated by your system ID.
2. Click **Sign Out**.

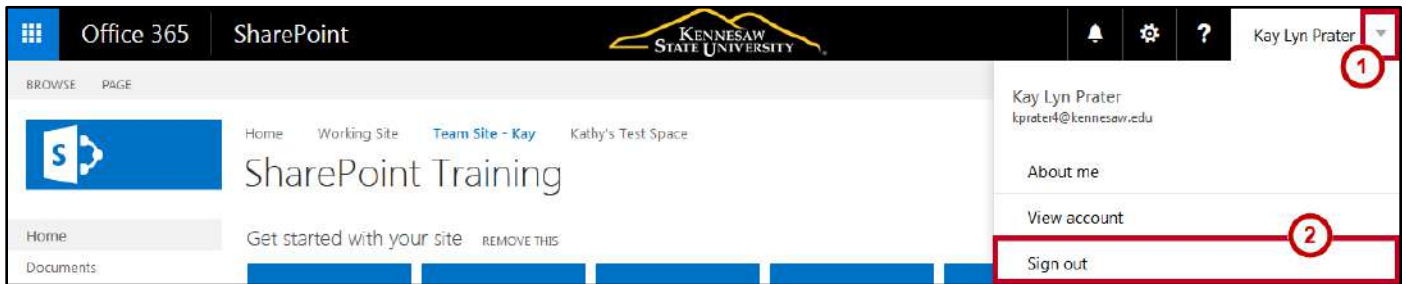


Figure 8 - Sign Out

## Creating a Site

Each site is based on a site template. The template that you choose will determine the basic layout and content of the site. There are four template categories: Collaboration, Enterprise, Duet Enterprise, and Custom (your stored Site templates). Each category contains various types of site templates from which to choose. For example, the Collaboration category contains the following templates, each designed for different purposes: Team Site, Blog, Project Site, and Community Site. The following explains how to create a new site using a template:

1. Navigate to the **parent site** where you want the site to be located.
2. Click the **Settings** button (See Figure 9).
3. Click **Site settings** (See Figure 9).
4. Click **Sites and workspaces** (See Figure 9).

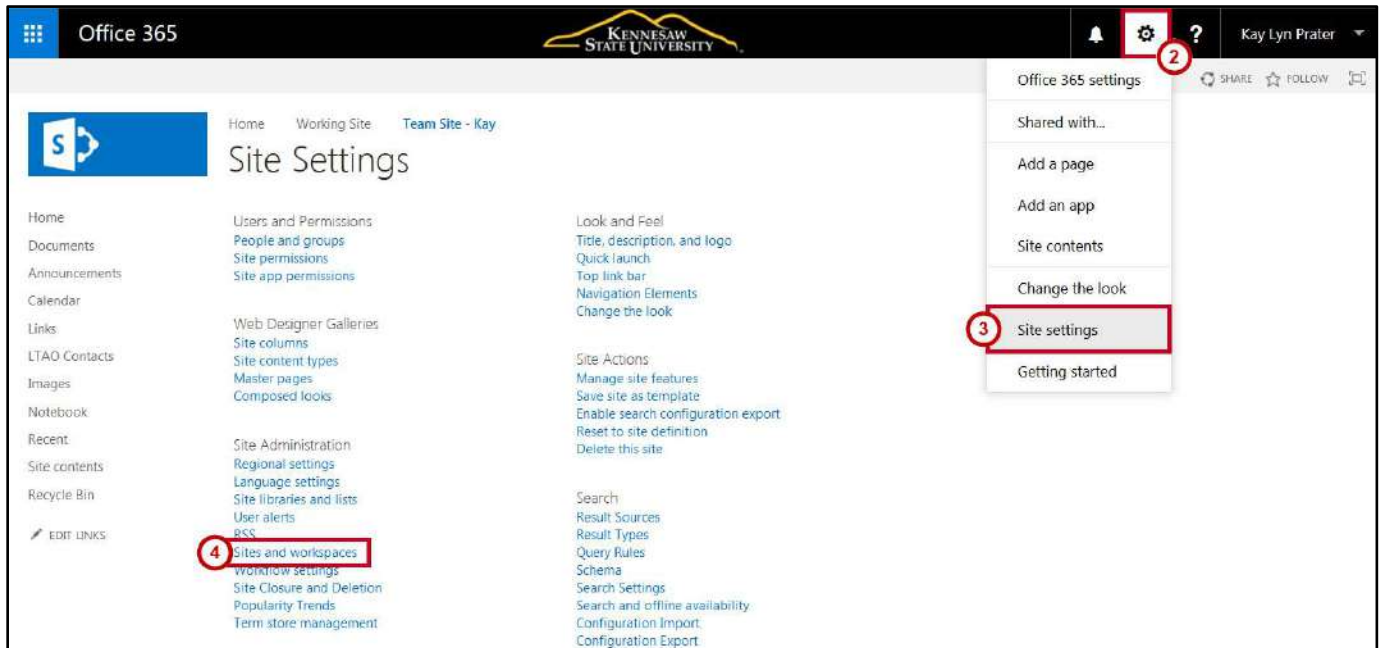


Figure 9 - Create Site

5. The *Sites and Workspaces* screen opens. Click **Create**.

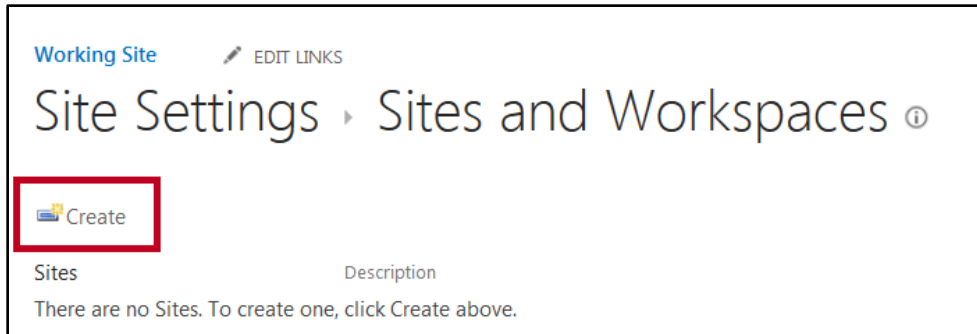


Figure 10 - Create Site

6. The *New SharePoint Site* window opens. In the *Title* box enter a **title** for the site (See Figure 11).
7. In the *Description* box, enter a **description** of the site (See Figure 11).
8. In the *URL name* box, enter whatever you would like to be the **last part of the URL name** for the site, keeping in mind there should be no spaces in the Web site address (See Figure 11).

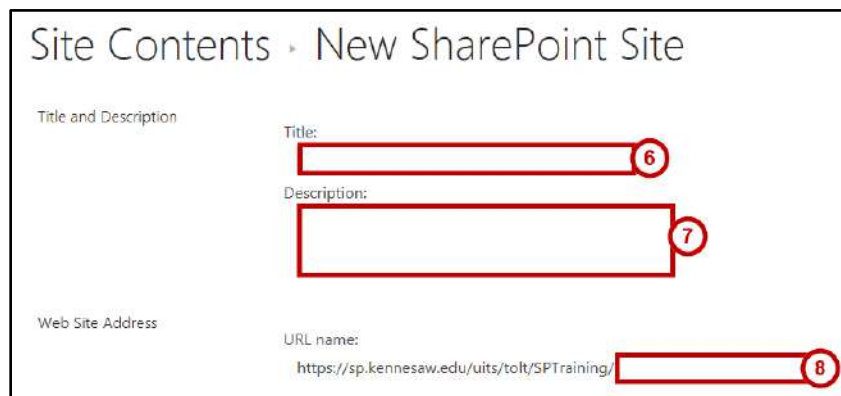


Figure 11 - Site Title, Description

9. Using the various options on the category tabs, select a **template** to create your site. In this example, we are selecting a Team Site. After creating your site based on the template selected and setting up your permissions, you will have a basic site with a few select pages and apps created for you. The Team site creates a Home page, document library, and a Notebook which opens in OneNote Online. Then, you will begin to add additional lists, libraries, apps and pages based on your needs.

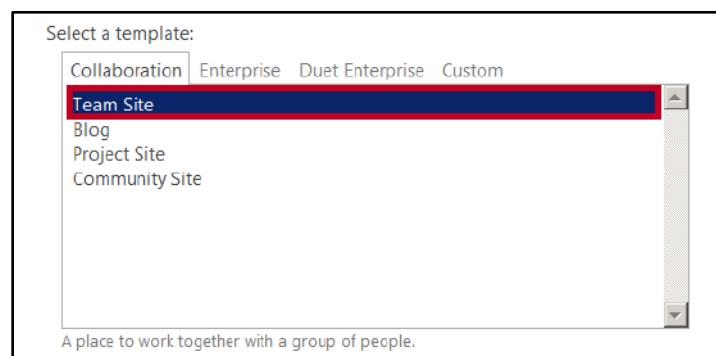


Figure 12 - Select Template

10. Under *User Permissions* you have two options:

- a. **Use same permissions as parent site:** The permissions granted on the parent site will be configured for the new site (See Figure 13).

**Note:** You cannot change user permissions on your new site unless you are an administrator of the parent site.

- b. **Use unique permissions:** You will be routed to the *Setup Groups for this Site* screen to configure new permissions for your new site (See Figure 13).

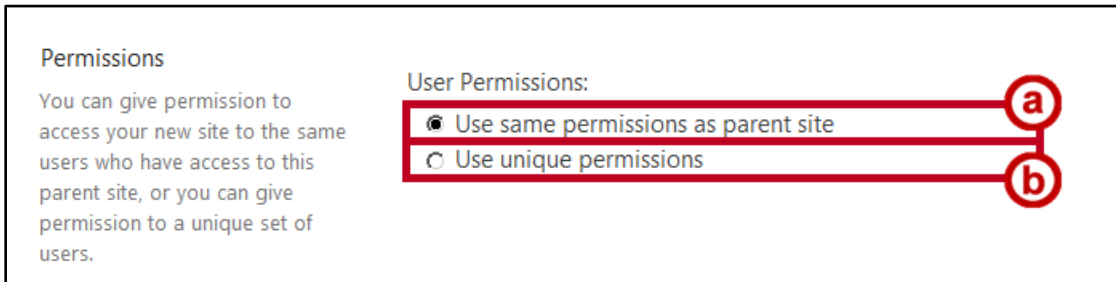


Figure 13 - User Permissions

11. In the *Navigation* section, specify whether or not you want to display the new site on the *Quick Launch* and/or *Top Link Bar* of the parent site. In the *Navigation Inheritance* section, specify whether or not you want this site to share the same *Top Link Bar* as the parent.

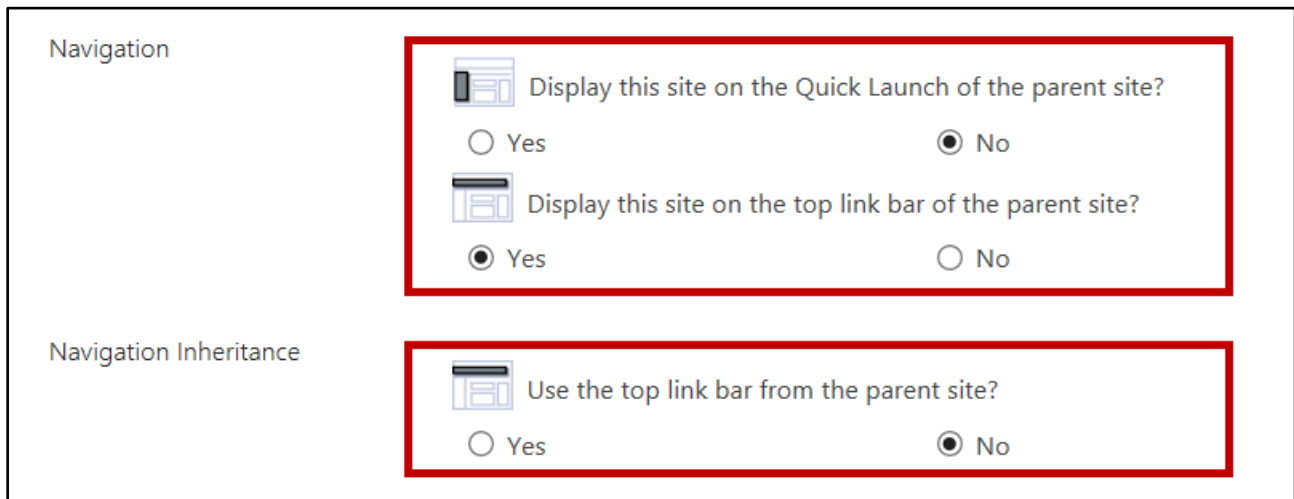


Figure 14 - Navigation

12. Click **Create**.

**Note:** If you selected *Use same permissions as parent site* in step 10 above, the new site will be created and you will be routed to the *Home* page of the new site. If you selected *Use unique permissions* in step 10 above, you will be routed to the *Set Up Groups for this Site* window (See *Set Up Groups for this Site*).

## Set Up Groups for this Site

The *Setup Groups for this Site* screen is used **only** when opting to create unique permissions rather than inheriting permissions from the parent site. You will skip over this screen if you selected *use same permissions as parent site* under user permissions. The following explains how to set up unique permission groups:

1. The *Set Up Groups for this Site* window allows you to set permissions for three groups:
  - a. **Visitors:** This group can read content in the Web site, but may not edit or contribute site content (See Figure 15).
  - b. **Members:** This group can contribute content to the Web site and edit their own contributions (See Figure 15).
  - c. **Owners:** This group has full control over the Web site (See Figure 15).

The screenshot shows the 'Set Up Groups for this Site' window with three sections, each containing a description and a form to create a new group. The forms are labeled a, b, and c.

**Visitors to this Site**  
Visitors can **read** content in the Web site. Create a group of visitors or re-use an existing SharePoint group.

**Members of this Site**  
Members can **contribute** content to the Web site. Create a group of site members or re-use an existing SharePoint group.

**Owners of this Site**  
Owners have **full control** over the Web site. Create a group of owners or re-use an existing SharePoint group.

Each form includes the following elements:

- Radio buttons for  Create a new group and  Use an existing group.
- A text input field for the group name (e.g., 'New Site Visitors', 'New Site Members', 'New Site Owners').
- A large empty text area for additional information.
- Icons for adding members and a list view.

Labels a, b, and c are placed to the left of each form. An 'OK' button is located at the bottom right of the window.

Figure 15 - Set Up Groups for this Site Window

2. In the *Visitors to this Site* section, to allow people to view the site, there are two options: **Create new group** or **Use an existing group**.
  - a. To use an existing group, click **Use an existing group** (See Figure 16).
  - b. Then, select a **group** from the drop-down list (See Figure 16).

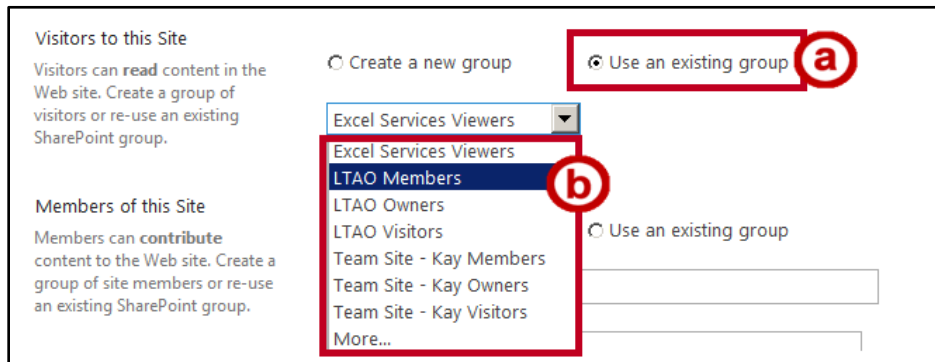


Figure 16 - Use an Existing Group

- c. To create a new group, click **Create a new group** (See Figure 17).
  - d. Enter the **group name** (See Figure 17).
  - e. Then click the **Browse** button to select users from the global directory (See Figure 17).
- Note:** Visitors can only read site content.

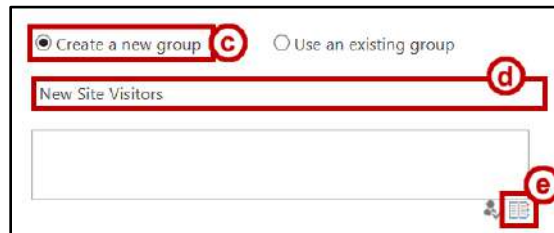


Figure 17 - Browse to Select Group

3. The *Select People and Groups* window will open. In the *Find* field, enter a **person's name** or a **group name** to search the global directory (See Figure 18).
4. Press **Search** (See Figure 18).

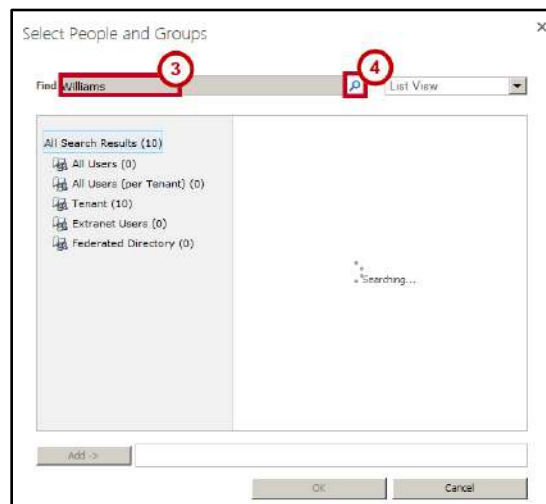


Figure 18 - Search People and Groups

5. Select the **name** from the resulting list (See Figure 19).
6. Click **Add** (See Figure 19).
7. Continue searching and adding names, and then click **OK** (See Figure 19).

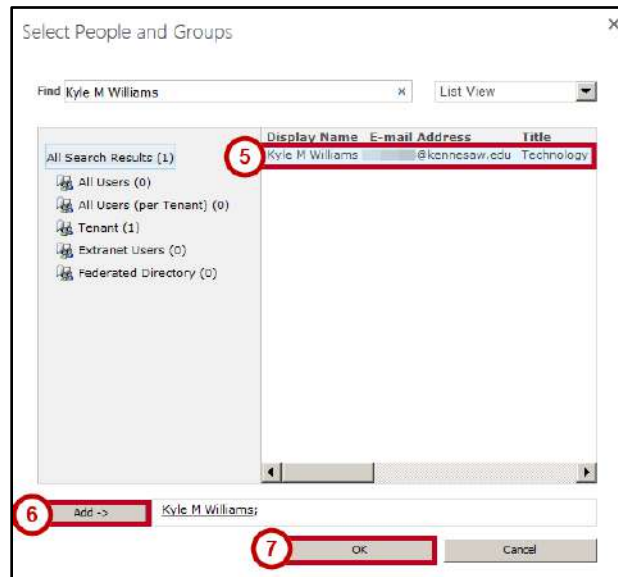


Figure 19 - Select People and Groups

8. In the *Members of this Site* section, repeat Steps 1-7 to give users **Contribute** permissions to the site. Members can view, add, edit, and delete site content.
9. In the *Owners of this Site* section, repeat Steps 1-7 to give users **full control** of the site.
10. Click **OK**.

**Note:** For information on other permissions settings and ways to grant site permissions, see Groups and Permissions.

## Groups and Permissions

### Default Permission Groups

A group is a set of SharePoint users who all have the same set of permissions that can be managed together. Groups allow you to more easily maintain site access and ensure that those performing similar tasks have the same level of access. A permission level is a set of permissions assigned to a specific group to achieve specific purposes. Three default groups are created when you create your SharePoint site—Owners, Members, and Visitors. You can also add your own custom groups with varying permission levels, such as Viewers, Designers, and more. The following describes the permission levels assigned to the three groups created by default when creating a SharePoint site:

- **Owners:** This is used to grant Full Control permissions to manage and add content to the site.
- **Members:** This is used to grant Edit permissions to the site. The majority of site users will be included in this permission level to edit documents, calendar items, and various other content.
- **Visitors:** This is used to grant Read permissions to the site, but prevent editing and download of list items.

## Assigning Permission Levels

When assigning permissions, take into consideration what security controls you want to put in place for your site. Permissions allow you to customize what content can be added, updated, deleted, and viewed and by whom. Permissions should be assigned based on the type of actions your site users will perform on your site. Following is a list of permission levels that may be assigned to groups and individuals:

- **Full Control:** Has full control and includes all permissions.
- **Design:** Can view, add, update, delete, approve, and customize.
- **Edit:** Can add, edit and delete lists; can view, add, update and delete list items and documents.
- **Contribute:** Can view, add, update, and delete list items and documents.
- **Read:** Can view pages and list items and download documents.
- **View Only:** Can view pages, list items, and documents. Document types with server-side file handlers can be viewed in the browser but not downloaded.

Site permissions are viewed using the **People and groups** link in the *Site Settings* window.

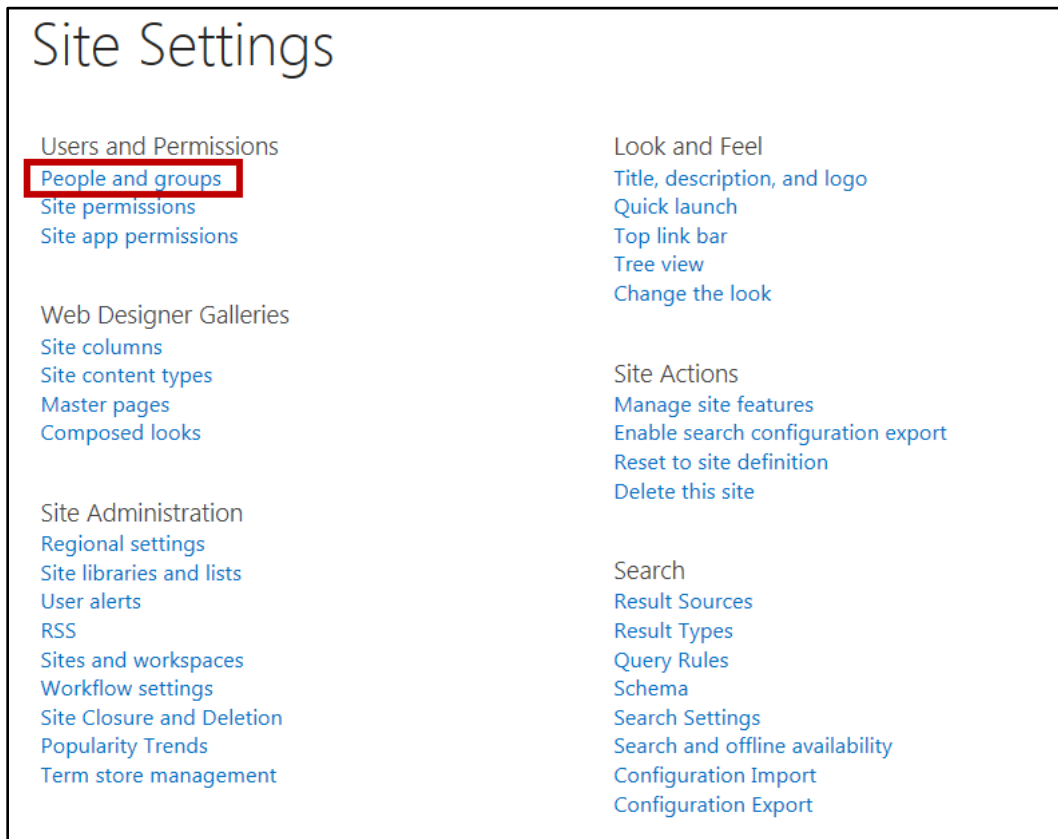


Figure 20 - Site Settings Window



Three default groups were created when the site was created and are displayed in *Quick Launch* after clicking the *People and groups* link—Owners, Members, and Visitors. Clicking the **more** button will display a comprehensive listing of groups populated by the system administrator and/or other users with the proper permissions to modify groups and group members.

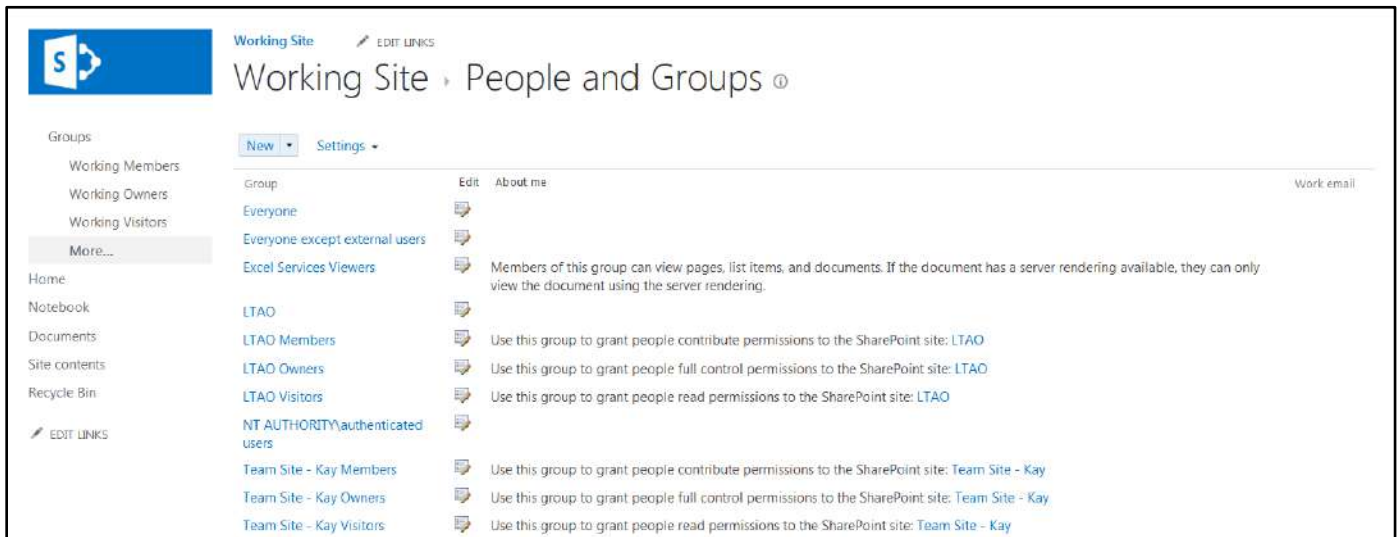


Figure 21 - People and Groups

**Note:** When you create a site and use *unique permissions*, you can use any of the existing groups in creating the three initial groups for the site.

To view members of a group, simply click the **group** you want to view.

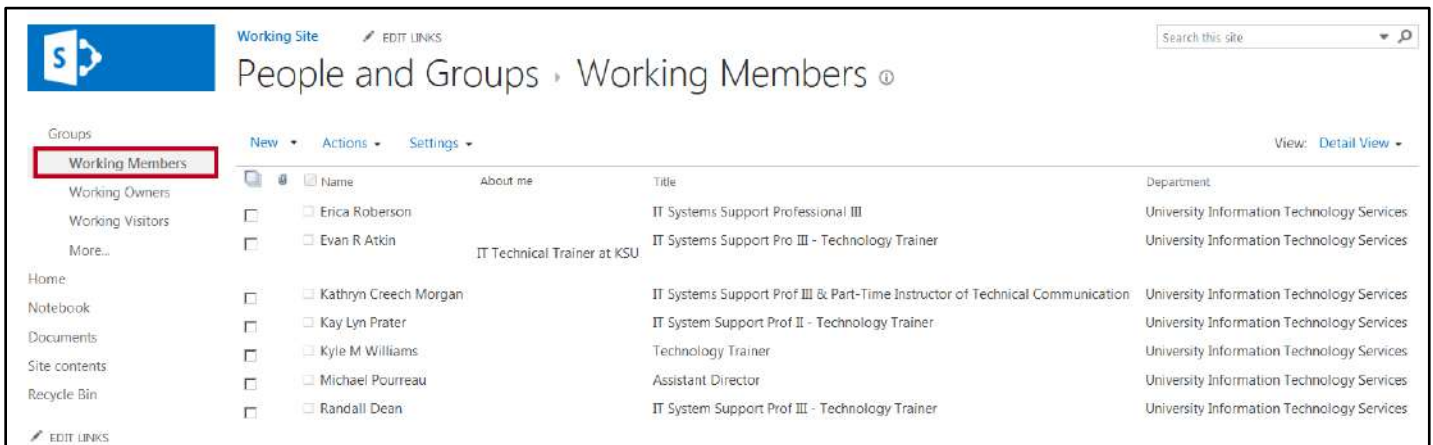


Figure 22 - View Group Members

## Modifying Site Permissions

After a site has been created, you may find it necessary to add a user to the site, remove a user's access from the site, or change a user's permissions on the site. The following sections provide instructions on how to make these modifications.



## Adding a User or Group to a Site

1. Navigate to the site and click the **Settings** button (See Figure 23).
2. To access the *Site Settings* window, click **Site Settings** (See Figure 23).

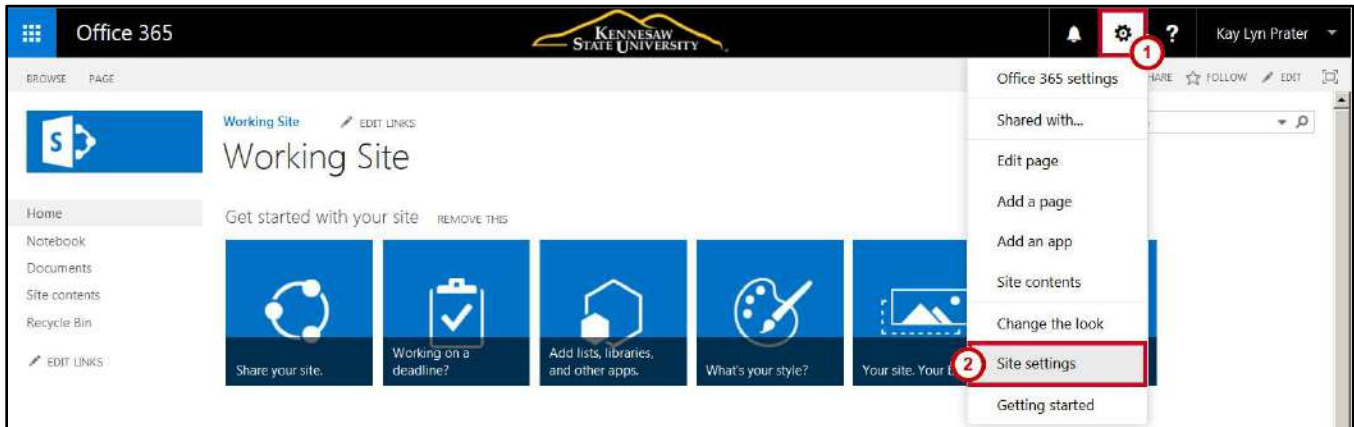


Figure 23 - Site Settings

3. In the *Site Settings* window, click **Site Permissions**. This will open the *Site Permissions* window.

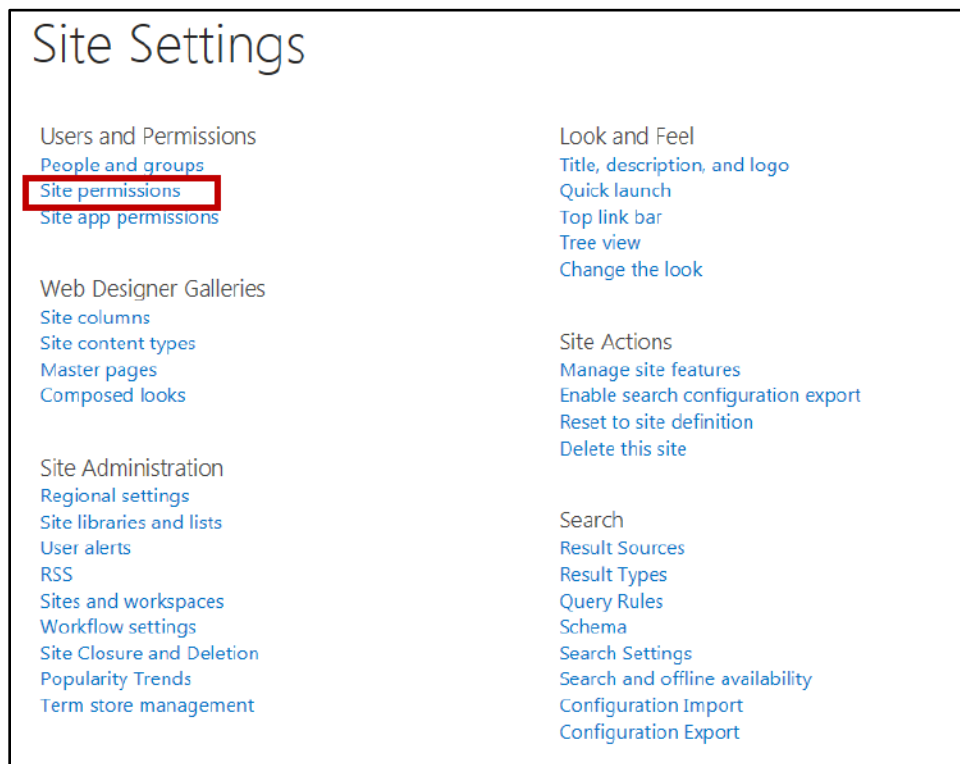


Figure 24 - Site Permissions

- In the *Site Permissions* window, on the Permissions tab, you will see a listing of the groups and users who have access to the site, and the permission level of each. In the *Ribbon*, click the **Grant Permissions**.

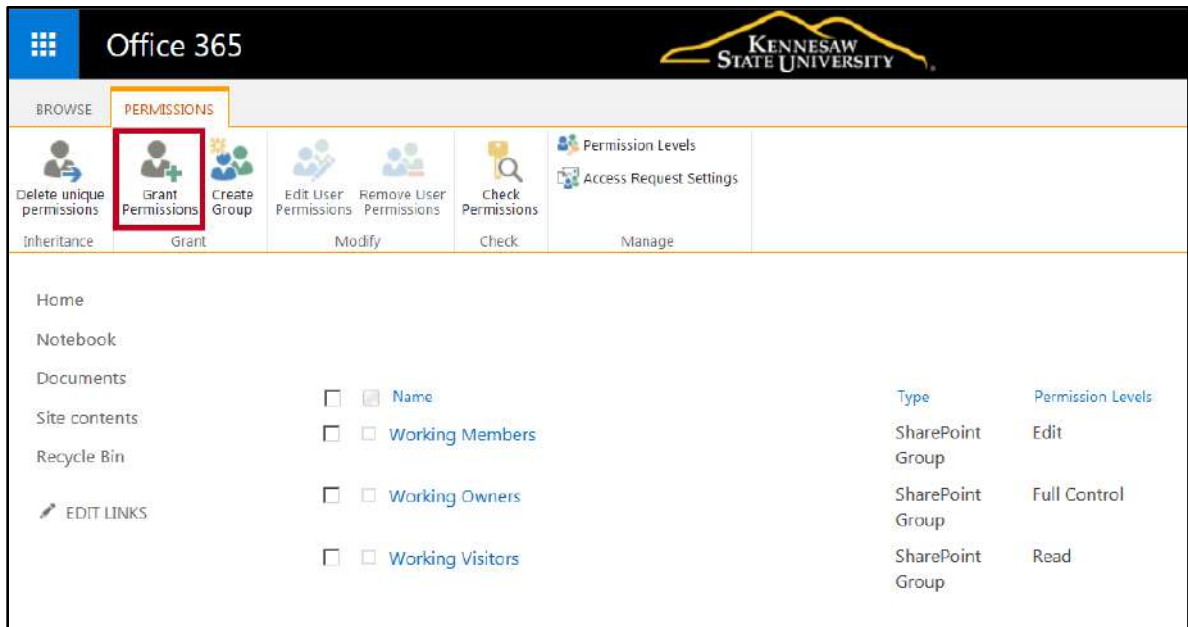


Figure 25 - Grant Permissions Button

- The *Share site* window opens to allow you to add members and create an email invitation message to notify users about access to the site.
- Enter the name(s) of the users/groups that you want to add to the site in the **Users/Groups** box. SharePoint will search Active Directory for the names as you type (See Figure 26).
- Include an optional personal message with the invitation (See Figure 26).
- To add users without sending an email invitation or change the default permission level, click **SHOW OPTIONS** (See Figure 26).

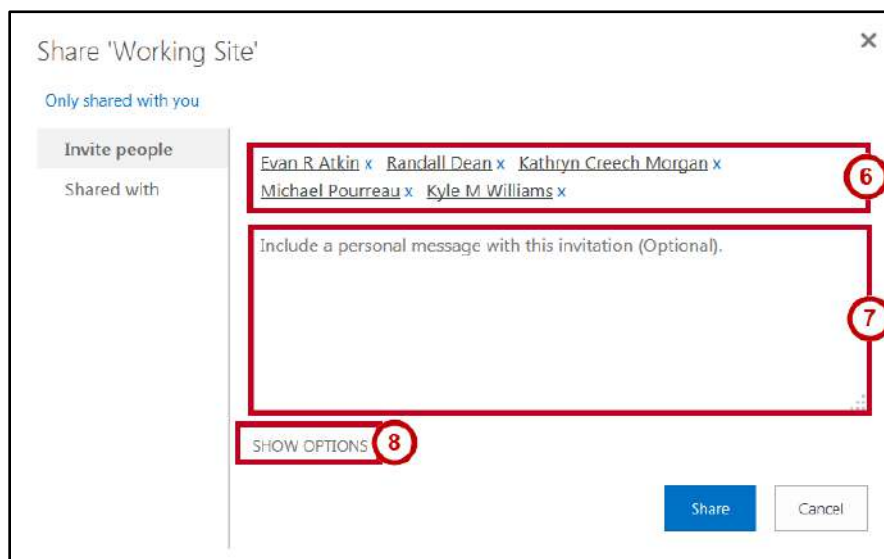


Figure 26 - Share Site Invitation

9. To disable the email invitation, click the **checkbox** to uncheck *Send an email invitation* (See Figure 27).
10. Under *Select a permission level*, the default permission level is set to *Edit*, but you have the opportunity to change the permission level before you send the message. Click the **drop-down arrow** to select an alternate permission level (See Figure 27).
11. Click **Share** (See Figure 27).

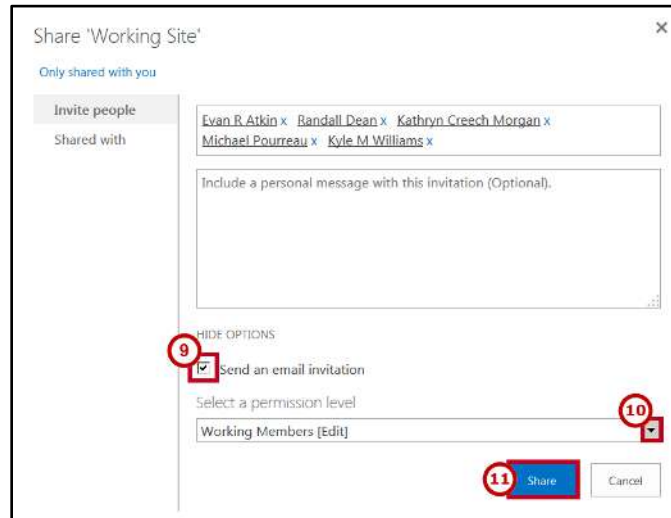


Figure 27 - Site Share Options

12. You can also share with others by clicking **Share** in the toolbar.

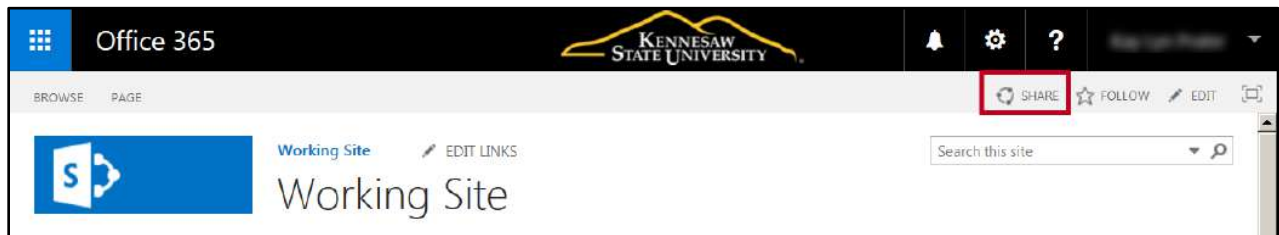


Figure 28 - Click Share

13. This routes you directly to the *Share site* window to allow you to invite others to your site and view who the site is currently being shared with.

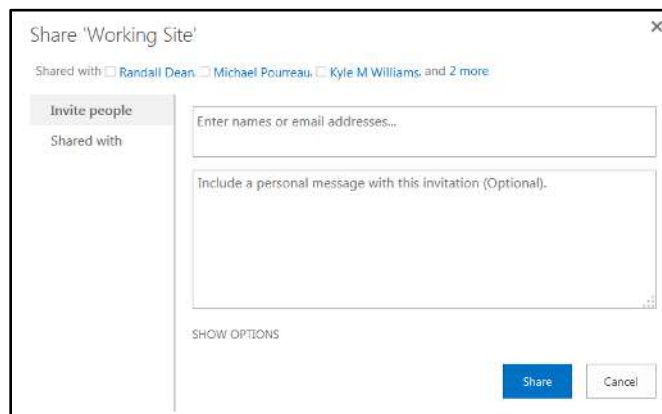


Figure 29 - Share Site Window

## Modifying Permissions on a Site

1. To easily view who you have shared your site with, navigate to the site and click **SHARE** in the toolbar.

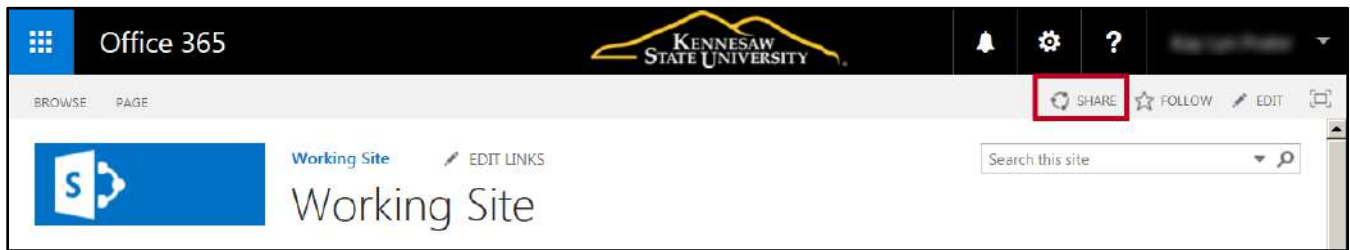


Figure 30 - Click Share

2. The *Share site* window will open to allow you to invite others to your site and view who the site is currently being shared with.

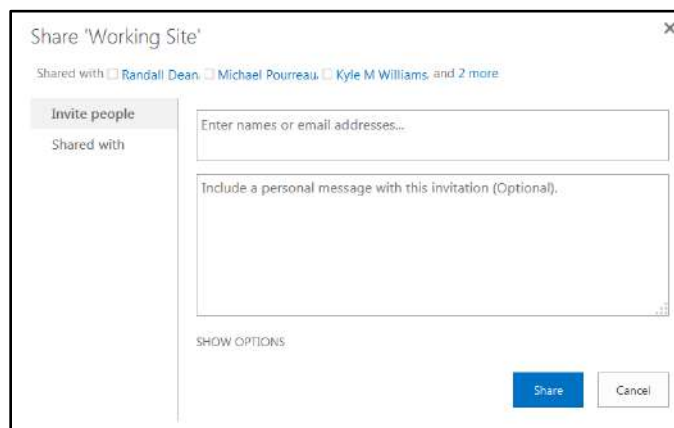


Figure 31 - Share Site Window

3. Click **Shared with** to view advanced options or to send an email to all with whom you have shared your site (See Figure 32).
  - a. Click **EMAIL EVERYONE** to create and send an email to everyone with whom you have shared your site or (See Figure 32).
  - b. Click **ADVANCED** to access site permissions to change permissions (See Figure 32).

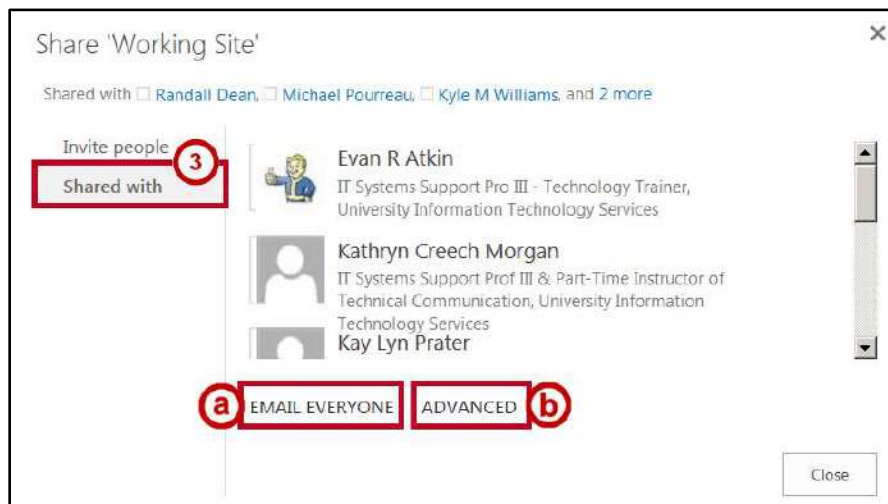


Figure 32 - Shared With

4. Click **Advanced** to open the *Site Permissions* window. From here, you can grant permissions to individuals, create a new group, edit permissions levels and membership to entire group.

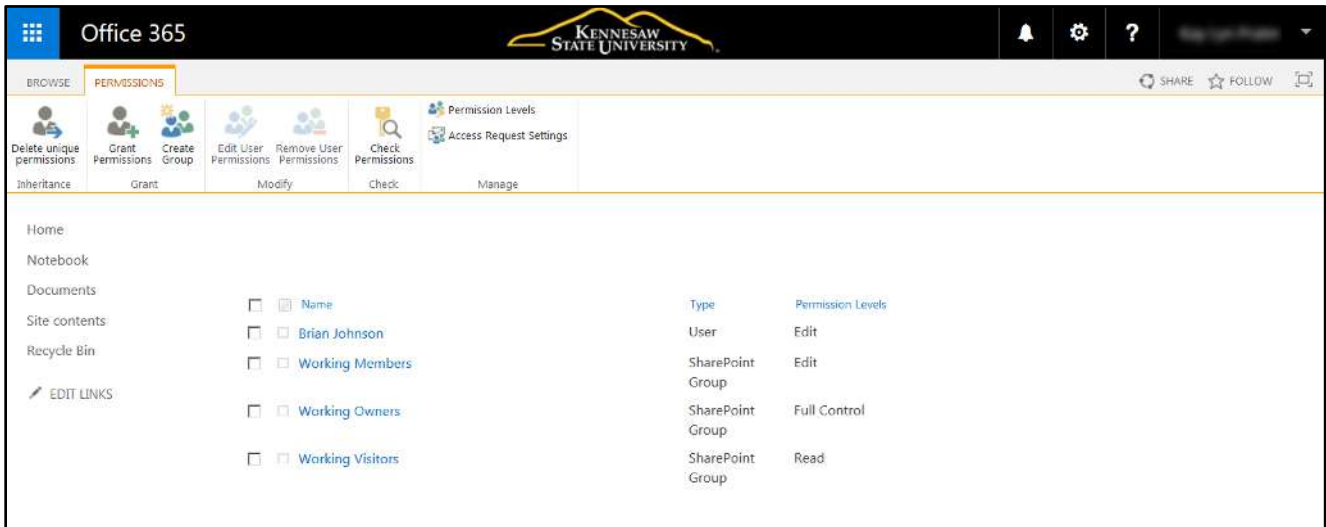


Figure 33 - Permissions Window

5. Click the **checkbox** next to the user or group that you want to change (See Figure 34).
6. Click the **Edit User Permissions** button on the Ribbon (See Figure 34).

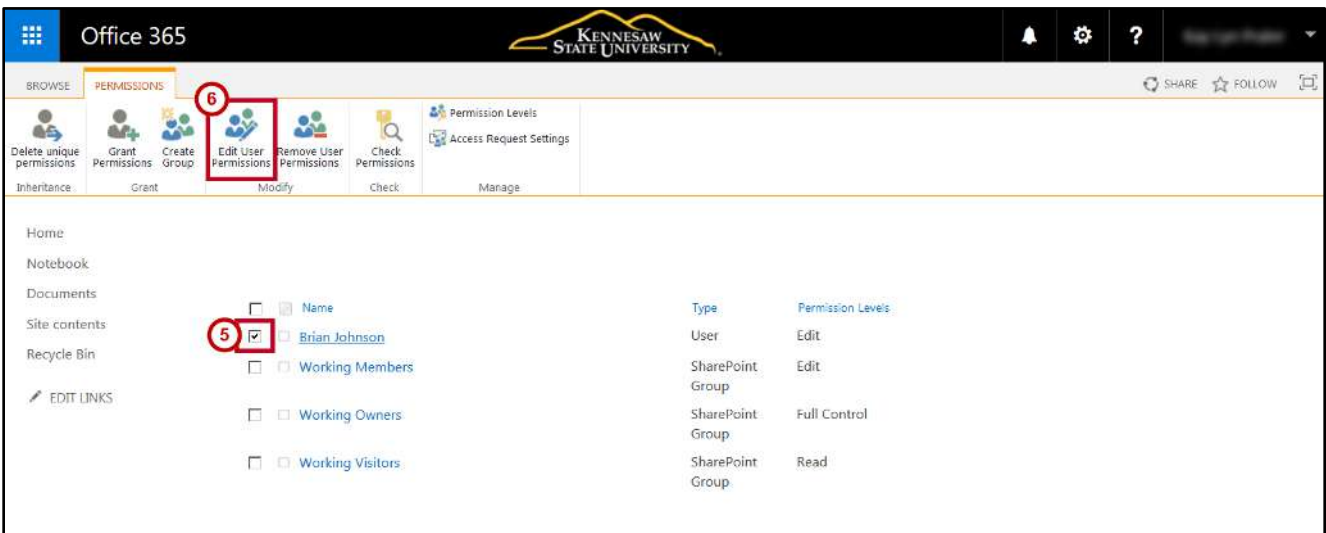


Figure 34 - Edit User Permissions

- In the *Edit Permissions* window, check the **appropriate boxes** (See Figure 35).
- Click **OK** (See Figure 35).

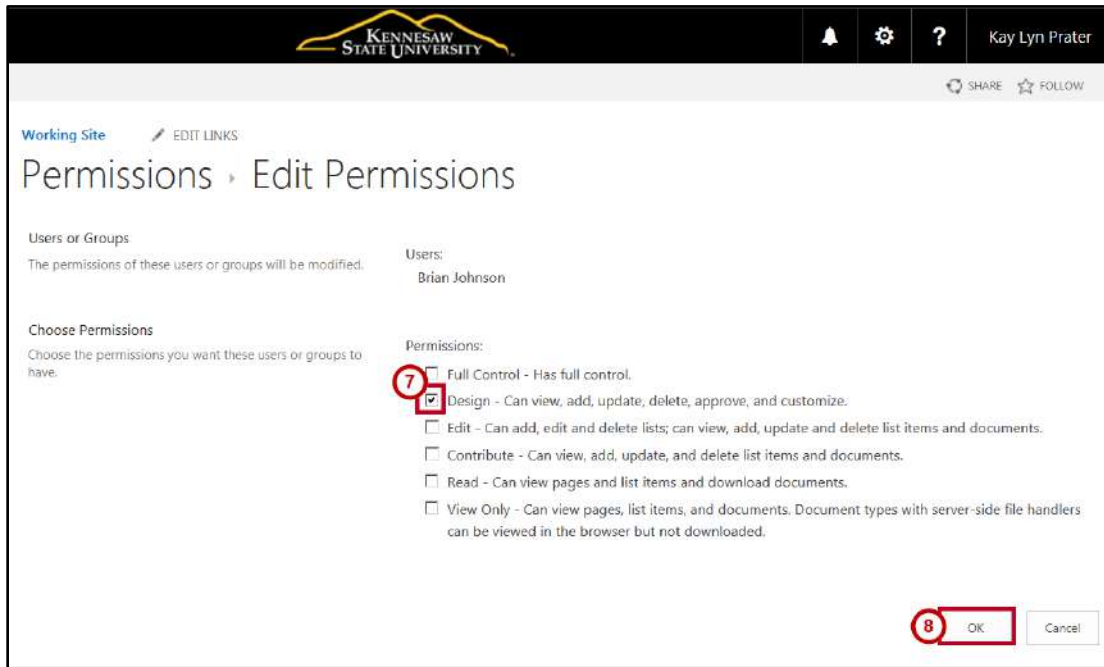


Figure 35 - Edit Permissions

## Creating a Group

If you have appropriate permissions, you can create new groups which you can then add to sites. Once a group has been created it can be added to any number of sites, and given different permissions on each site. Since it is quicker to add a group to a site than to add individuals, there may be times when you even want to create a group with only one member.

- Navigate to the appropriate site and click the **Settings** button (See Figure 36).
- To access the *Site Settings* window, click **Site Settings** (See Figure 36).

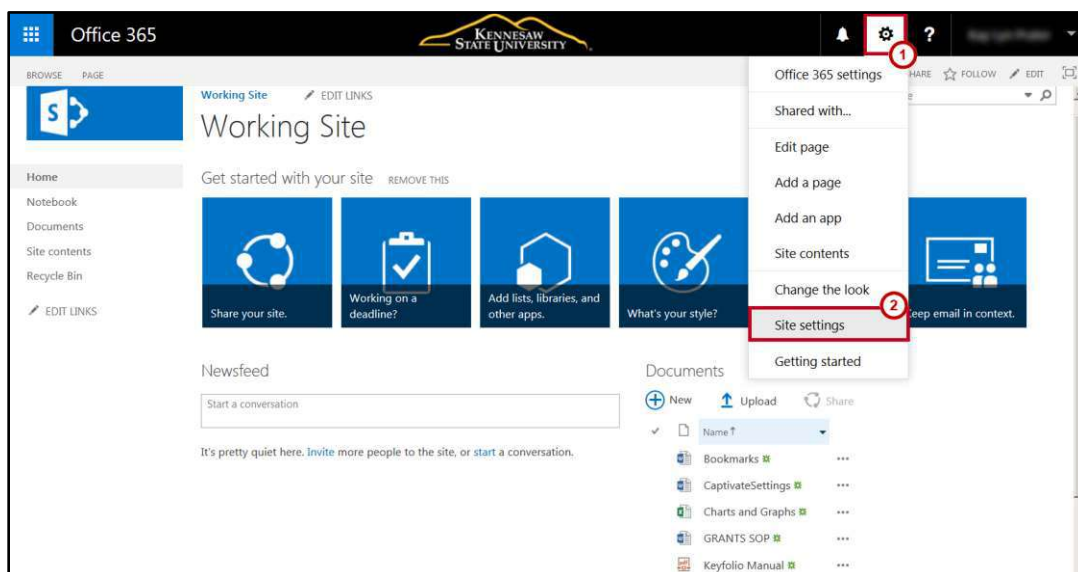


Figure 36 - Site Settings

3. In the *Site Settings* window, click **Site Permissions**. This will open the *Site Permissions* window.

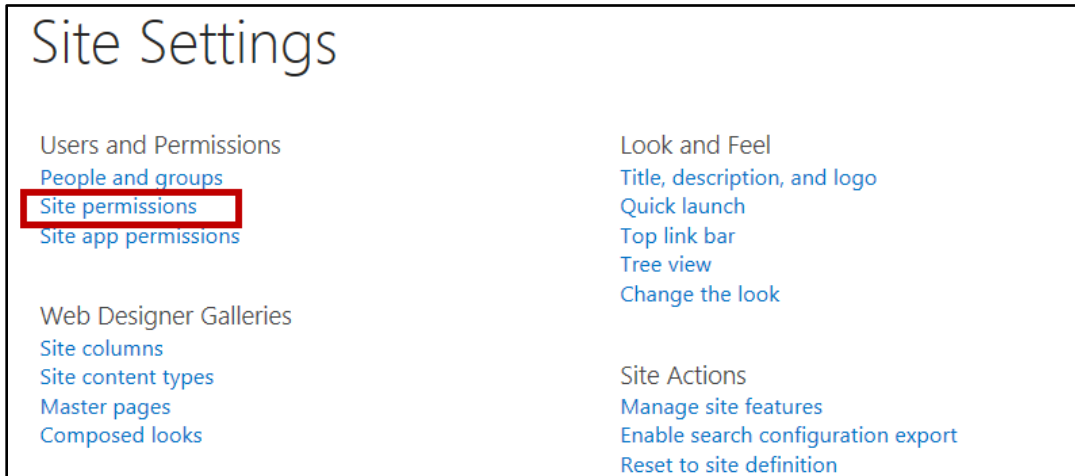


Figure 37 - Site Permissions

4. In the *Site Permissions* window, on the Permissions tab, you will see a listing of the groups and users who have access to the site, and the permission level of each. In the *Ribbon*, click **Create Group**.

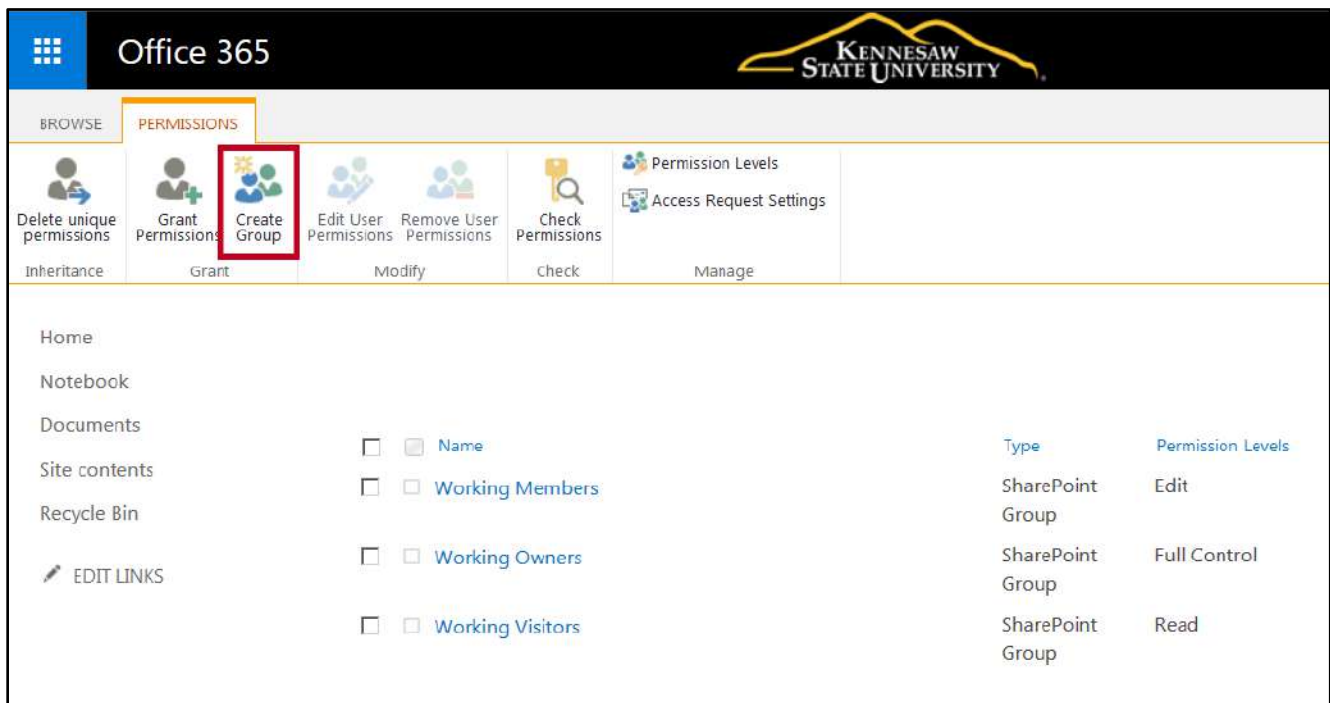


Figure 38 - Create Group



5. The *Create Group* page opens. Enter a **name** and **description** for the group in the appropriate fields.

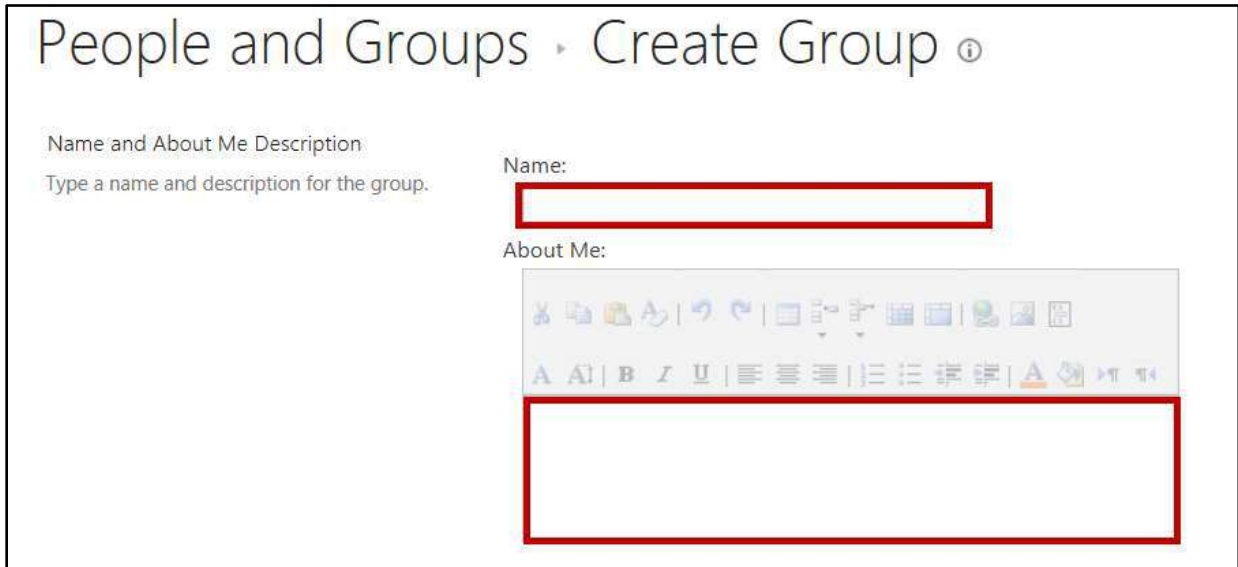


Figure 39 - Enter Name and Description

6. In the *Group Owner* field, the ID of the person creating the group appears. The group owner can change anything about the group such as adding and removing members or deleting the group. There may be only one user or group listed as the *Group Owner*. To change the group owner:
- Enter the **ID or name** of a person, or a part of the name of an existing group in the *Group owner* box (See Figure 40).
  - Select a **name** from the resulting list (See Figure 40).
  - Click **Delete (x)** to remove the original group owner (See Figure 40).

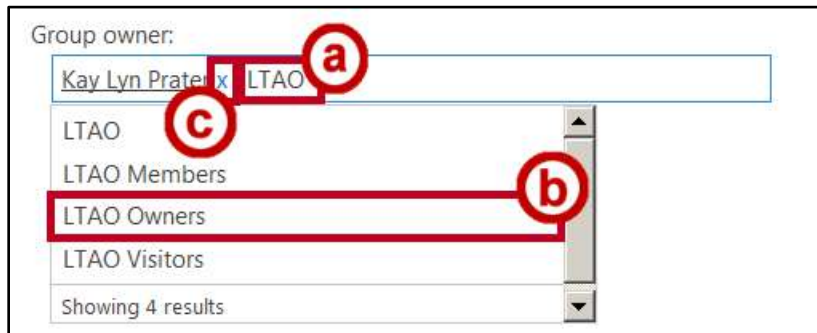


Figure 40 - Change Group Owner



7. In the *Group Settings* section, specify who can **view and edit** the membership of the group (See Figure 41).
8. In the *Membership Requests* section, specify whether to **allow users to request to join/leave the group**. If you answer *Yes*, enter the **email address** of the person who will receive the requests (See Figure 41).
9. Under *Auto-accept requests*, *No* is checked by default. Click **Yes** to change to Auto-accept; otherwise, enter an email address to which to route user access requests (See Figure 41).

**Figure 41 - Group Settings & Membership Requests**

10. In the *Give Group Permission to this Site* section, click the **check-box** for the level of permission that you want to give to this group on this site (See Figure 42).

**Note:** This group can be added to other sites and assigned different permissions.

11. Click the **Create** button (See Figure 42).

**Figure 42 - Assign Group Permission**

## To check a group's full permissions:

1. Navigate to the site, and click the **Settings** button.
2. The *Settings* will open. Click **Site Settings**.
3. On the Site Settings page under *Users and Permissions*, click **People and groups**.
4. In the *Groups* list, click the **name** of the group you want to view (See Figure 43).
5. On the *Group* page, click the **drop-down arrow** for *Settings* (See Figure 43).
6. Click **View Group Permissions** (See Figure 43).

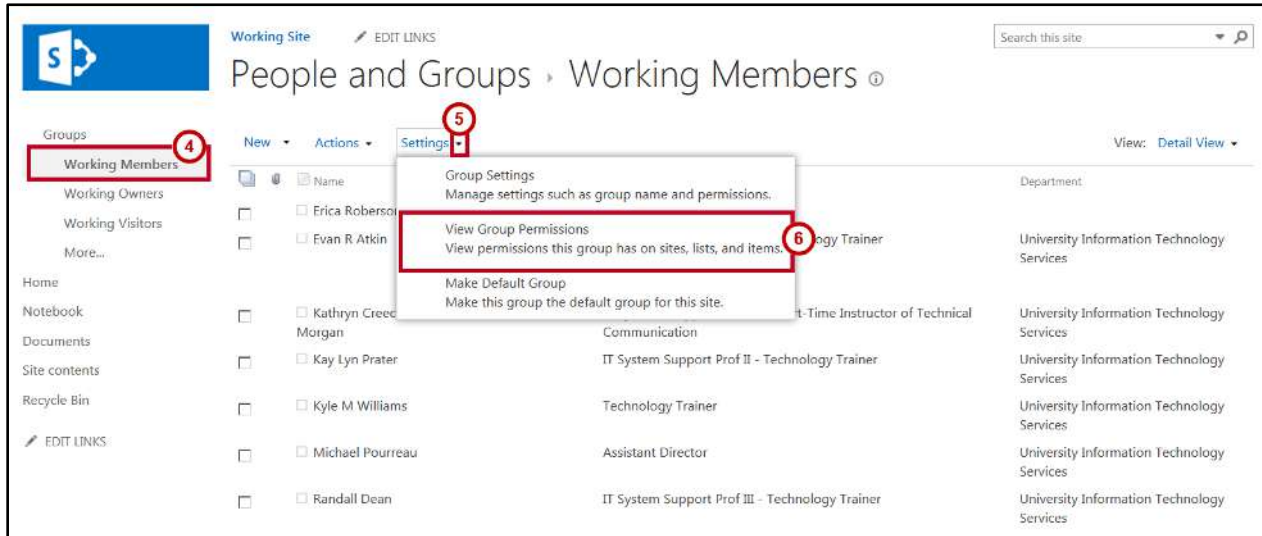


Figure 43 - View Group Permissions

7. You will see a page with the URL of each site to which the group has access, and the permission level of the group on that site.

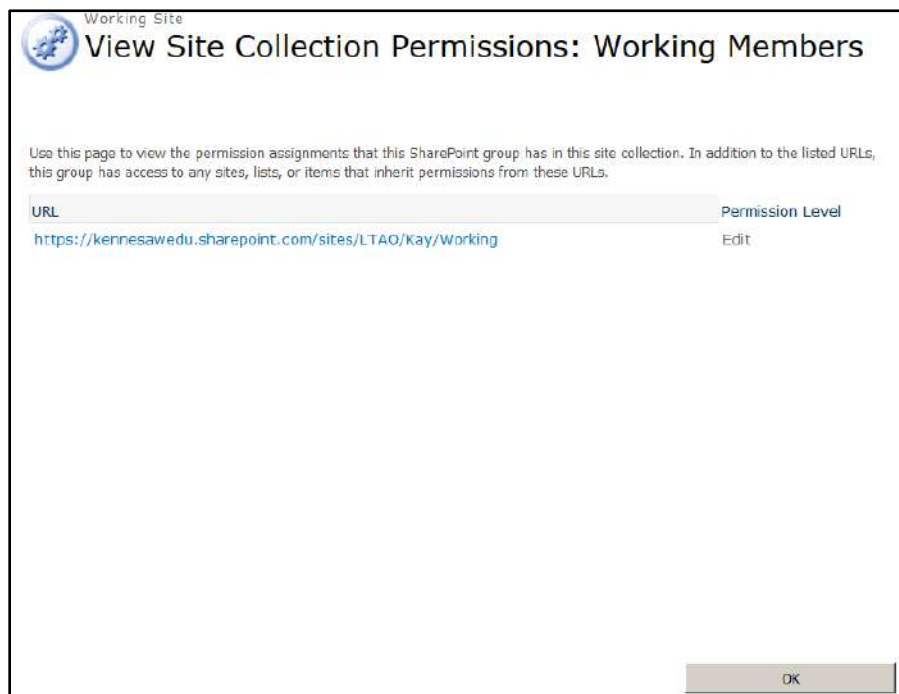


Figure 44 - Group Site Permissions

## Deleting a User from a Group

1. Navigate to the *appropriate site* and click the **Settings** button.
2. The *Settings* will open. Click **Site Settings**.
3. On the Site Settings page under *Users and Permissions*, click **People and groups**.
4. In the *Groups* list, click the **name** of the group you want to edit (See Figure 45).
5. Click the **checkbox** next to the name of the person whom you want to delete (See Figure 45).
6. Click the **drop-down arrow** for *Actions* (See Figure 45).
7. Click **Remove Users from Group** (See Figure 45).

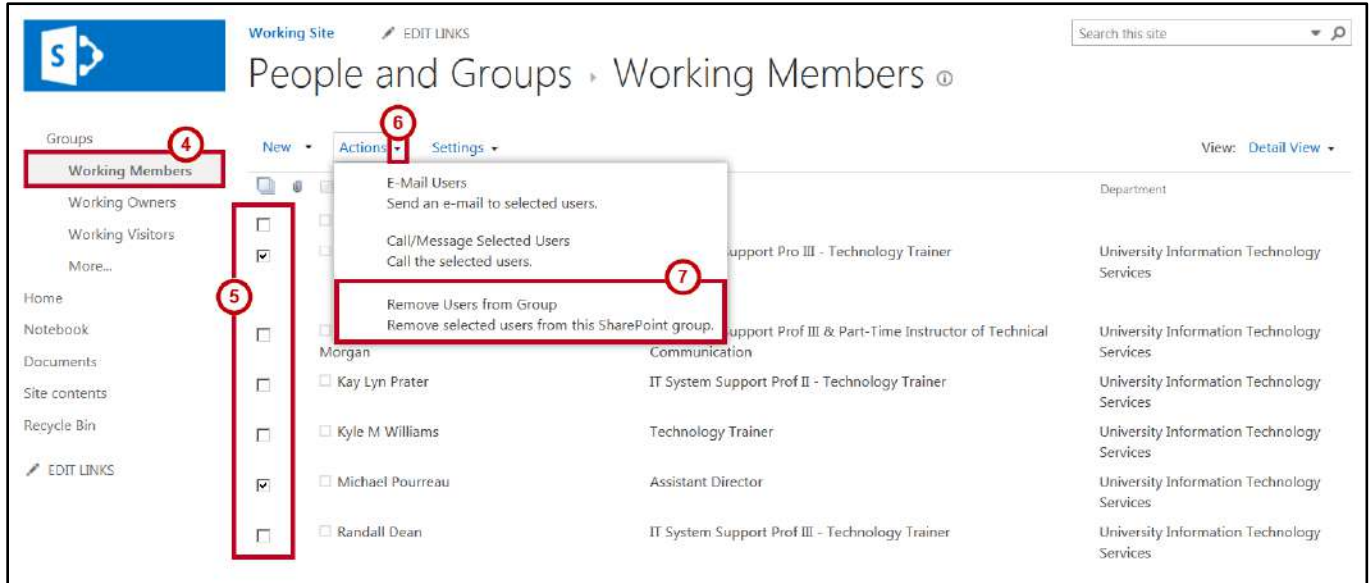


Figure 45 - Select Users to Remove

8. Click **OK** to remove user from group.

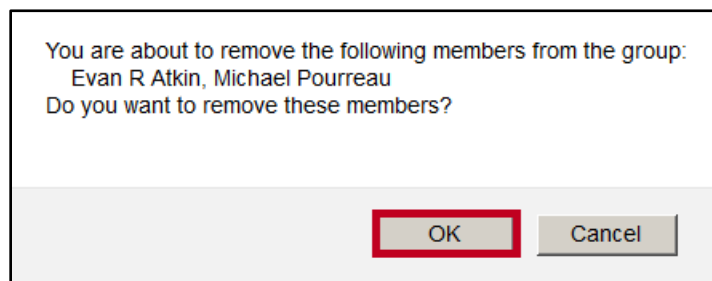


Figure 46 - Remove from Group

## Your New Team Site

After creating your site based on the template selected and setting up your permissions, you will have a basic site with a few select pages and apps created for you. Then, you will begin to add additional lists, libraries, apps and pages based on your needs. For example, if you created a site using the Team Site template, you will begin with a Home page with various sections, a notebook that opens in OneNote Online, a documents library, and a Site Contents page to view and add content to your site. You may add additional content to your site by modifying your Home page and adding pages, creating notes in the Notebook, creating and organizing documents in the documents library, and adding apps built into SharePoint 2016.

1. There are six *Getting Started* helper tiles to assist you in creating content and selecting the style of your site. You may remove the helper tiles or click on a tile to access the help feature for the tile selected. The following is a description of each starter tile:
  - a. **Share your site:** Opens the *Share Site* window where you will invite users to your site via email message (See Figure 47).
  - b. **Working on a deadline:** Adds a project summary timeline to your home page along with task and calendar apps to your site (See Figure 47).
  - c. **Add lists, libraries, and apps:** Opens the *Site contents > Your apps* window to add apps to your site (See Figure 47).
  - d. **What's your style:** Opens the *Site Settings > Change the look* window to select an alternate color scheme and/or look for your site (See Figure 47).
  - e. **Your brand:** Opens *Site Settings > Title, Description and Logo* window to allow you to add a title, description, and logo to your site (See Figure 47).
  - f. **Keep email in context:** When available, opens a window to add a Site Mailbox to your site to share email on your site and connect to Outlook (See Figure 47).
2. Click the **REMOVE THIS** link (See Figure 47) to remove the tiles and insert your own content using the instructions for working with pages instructions below (See Working with Pages).

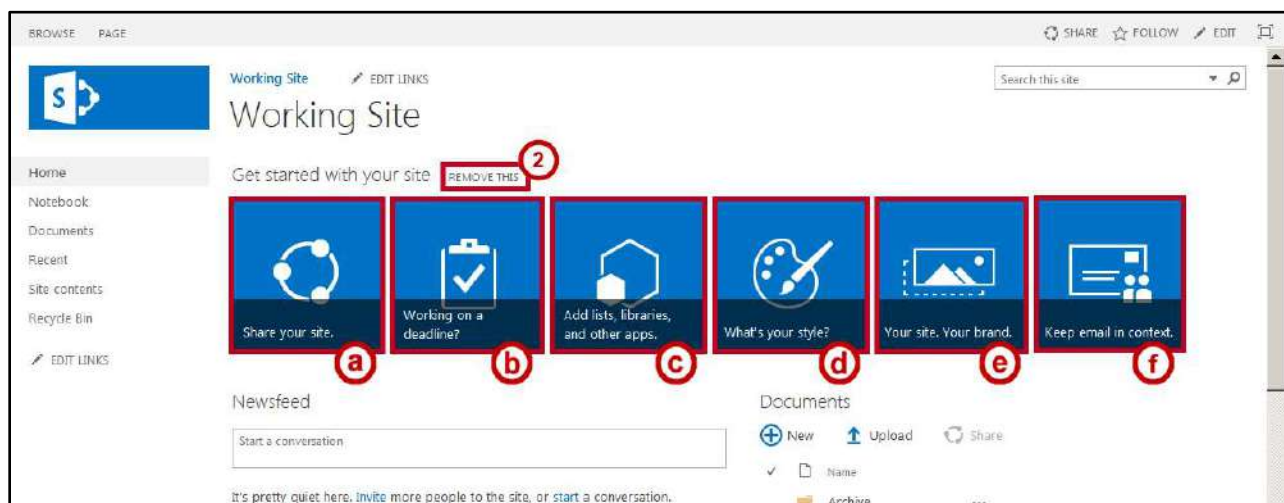


Figure 47 - Basic Team Site

## Working with Pages

Using pages is a way to share information and ideas using a variety of types of content all at the same time. You can insert text, images, videos, documents and more all on the same page. 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, without zones or many formatting tools available. A Web Parts page contains Web Parts in Web Part zones. They have predefined layout options that use Web Part zones to help you create your page. Each SharePoint site has, at minimum, one page—the *Home Page*, which is a Web Parts page. If you like, you can add additional pages to a site.

### Creating a Web Parts Site Page

1. In *Quick Launch*, click **Site Pages**.

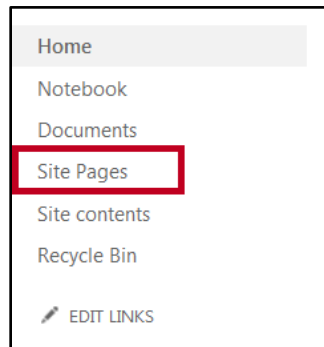


Figure 48 - Click Site Pages

2. The *Site Pages* window appears. Click **New**.
3. A drop-down appears displaying the various types of pages you can create. Click **Web Part Page**.

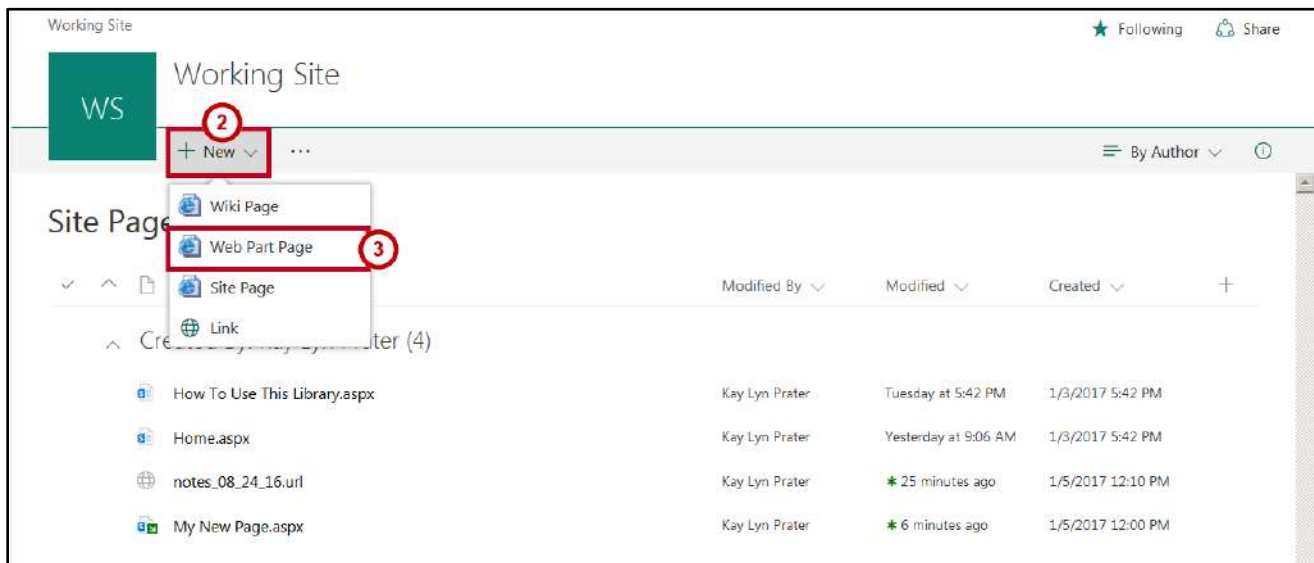


Figure 49 - Create New Web Part Page

## Editing a Web Part Site Page

Pages are made up of building blocks called Web Parts. The default page layout for a Team site contains one Web part to add content to the page, but you have options to modify the layout to organize your page in various ways as well as add various types of content to your page such as pictures, videos, links, app parts, and more Web parts.

After creating the page, you are taken to the page *Edit* window where the Ribbon is organized into various tabs and groupings with buttons and drop-down boxes to help you edit your page. By default, you are first taken to the *Format Text* tab to begin building your page by entering and formatting text, selecting styles for your elements and text, and selecting a layout for your page.

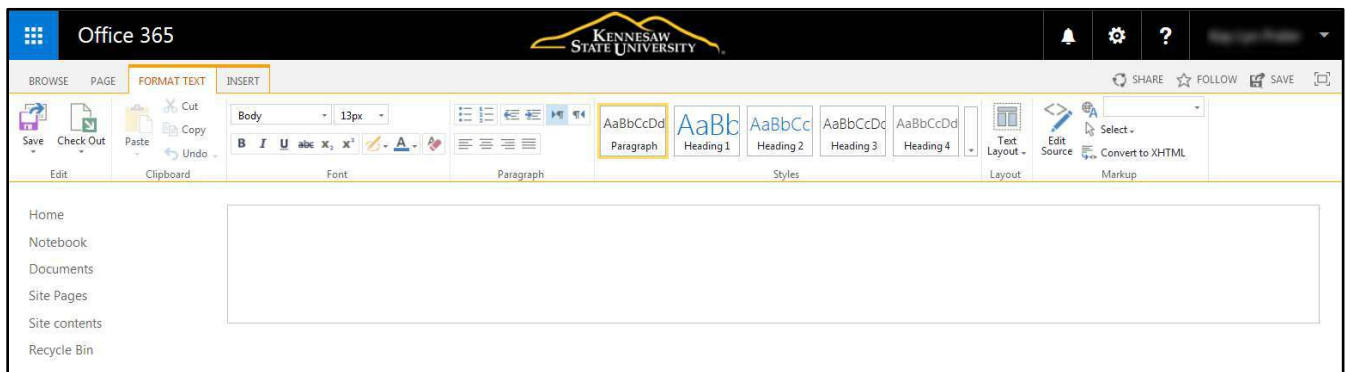


Figure 50 - Edit New Page

## Checking Out a Page

To prevent any other users from editing your page while you are in edit mode, you can check out the page. A checked out page cannot be edited by anyone else while it remains checked out. To check out a page:

1. In the ribbon, click **Check out**.

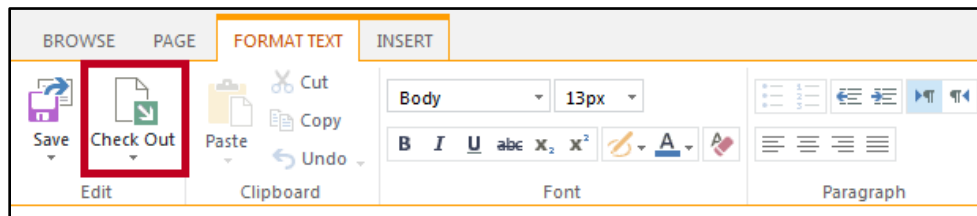


Figure 51 - Click Check Out

2. This changes the status to *Checked out and editable*. The page can be edited only by the person who checked it out (See Figure 52).
3. Changes made will be seen only when the page is checked in using the *Check in* button (See Figure 52).

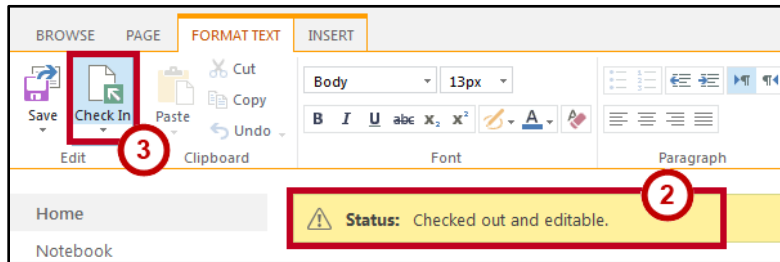


Figure 52 - Check In

## Changing the Layout

To change the layout for your page:

1. Click the **Text Layout** button on the *Format Text* tab on the Ribbon (See Figure 53).
2. The drop-down box displays the various layout options available. Select the **layout** that you want for the page. This example uses two columns with a header (See Figure 53).

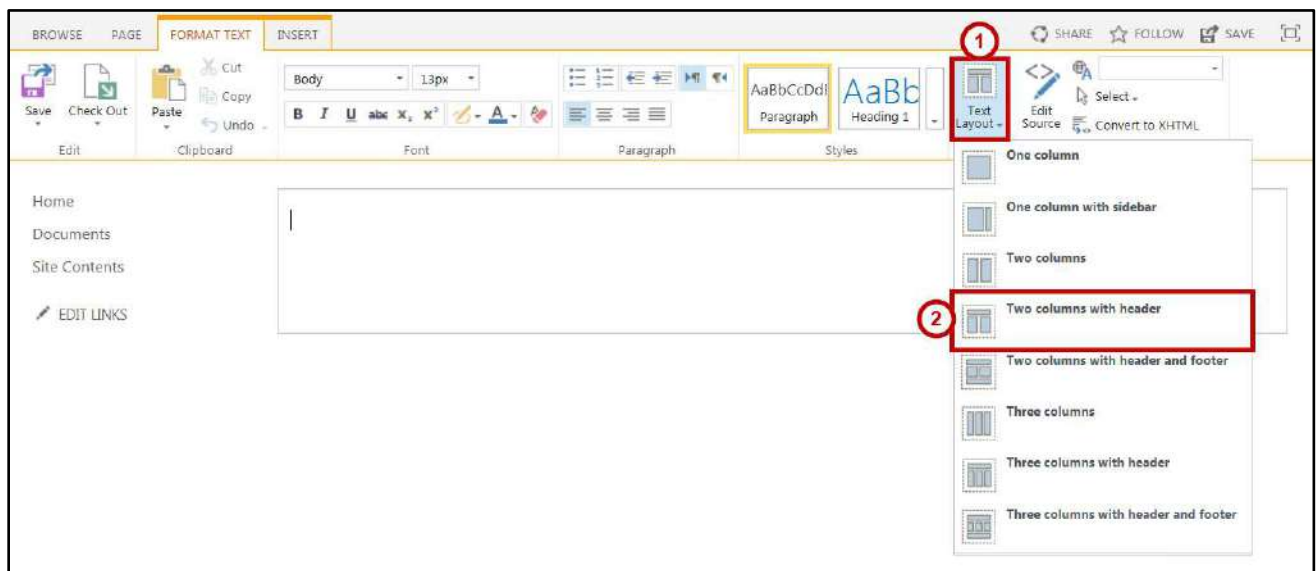


Figure 53 - Select Text Layout



3. The Web part sections update based on your selection.

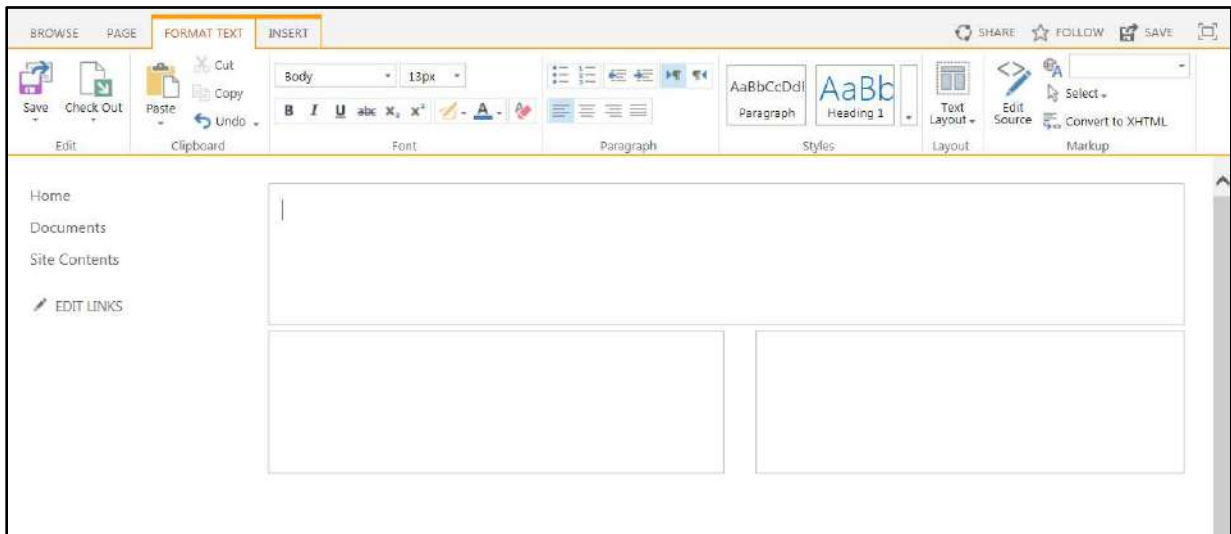


Figure 54 - New Page Layout

### Adding a Web Part to a Page Zone

Web Parts are arranged on a page in *zones*. The zone is an anchor for the Web Part on the page. To insert a Web Part:

1. Click the **Insert** tab on the *Ribbon* (See Figure 55).
2. Click **Web Part** (See Figure 55).

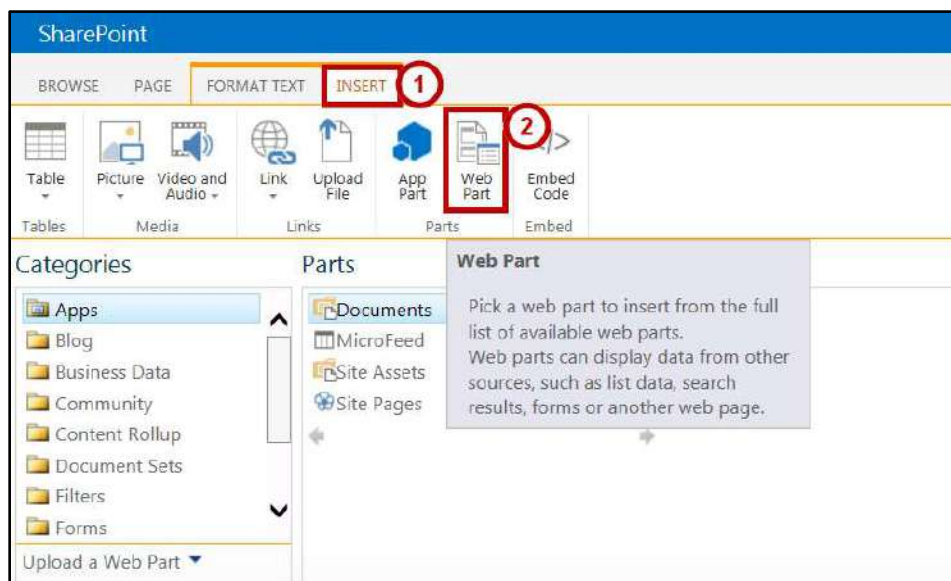


Figure 55 - Insert Web Part



3. Click in the **zone** where you want the Web Part inserted (See Figure 56).
4. Select a **Category** from the *Categories* list (See Figure 56).
5. Select a **Web Part** from the resulting *Web Parts* list (See Figure 56).
6. Click **Add** (See Figure 56).

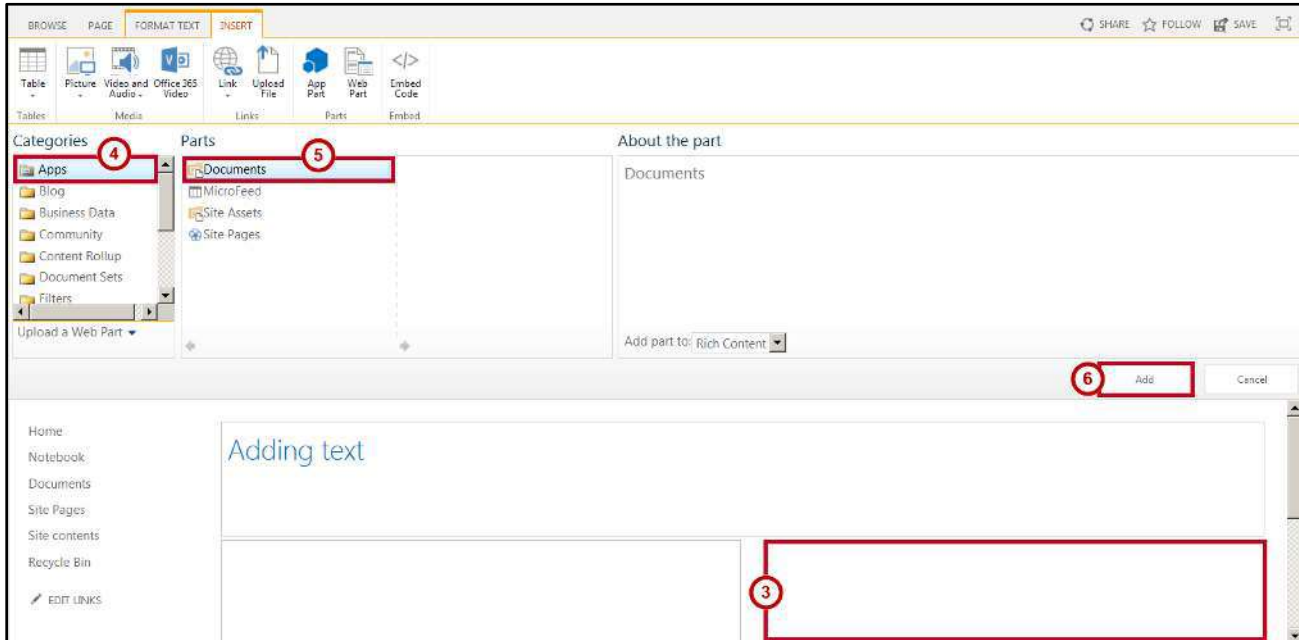


Figure 56 - Insert Documents Web Part

7. The Web Part will now appear in the zone that you selected.

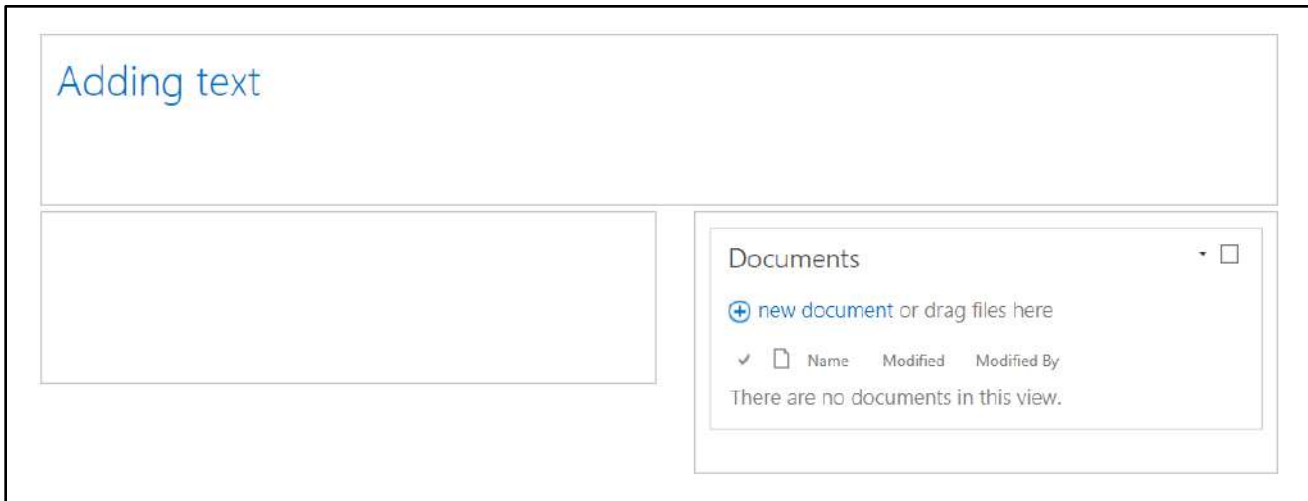


Figure 57 - Web Part Added to Zone

8. You can add additional content to the zone simply by placing your cursor in the desired location and typing or using the *Insert* tab to select parts, media, or files to add.

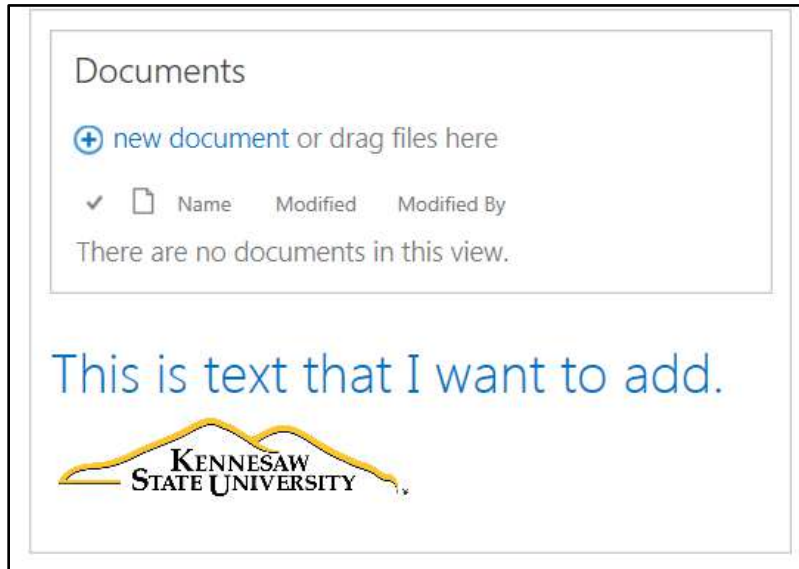


Figure 58 - Adding Content to Zone

9. To make modifications to a Web Part in a zone, hover the mouse pointer over the top right-hand corner of the Web Part, and then click the **drop-down arrow** that appears.

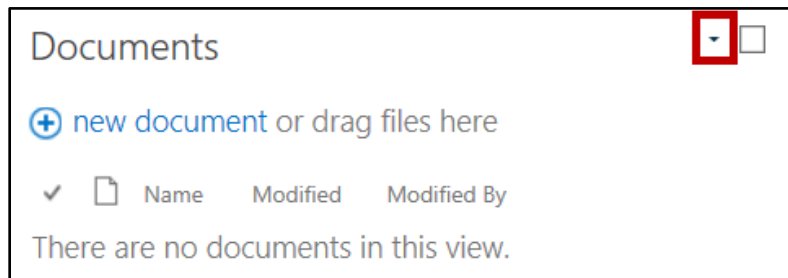


Figure 59 - Web Part Menu

10. Click **Edit Web Part**.

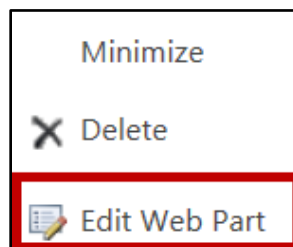


Figure 60 - Edit Web Part

11. The tool pane corresponding to the Web Part you selected opens to allow you to enter information to define or modify the Web Part settings. In this example, you may also want to change the title for the Documents library on the page. Click the **expand (+)** button to open the *Appearance* section and modify the title.

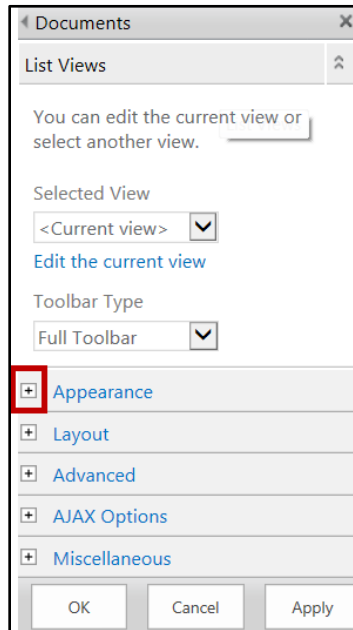


Figure 61 - Edit Web Part Settings

12. The section opens to allow you to make modifications. In the *Title* field, type **Team Documents**.

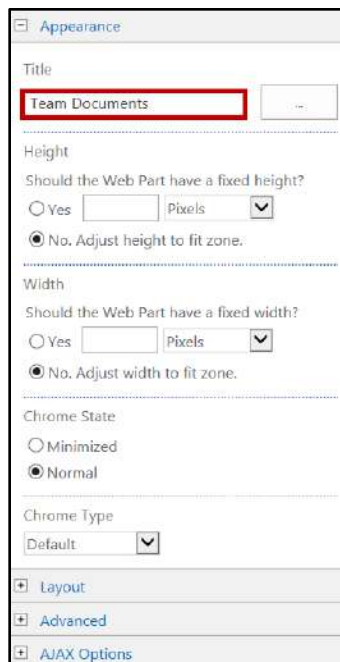


Figure 62 - Edit Web Part Title

13. Click **OK** when you have made all changes.

14. The *Web Part title* has been updated.

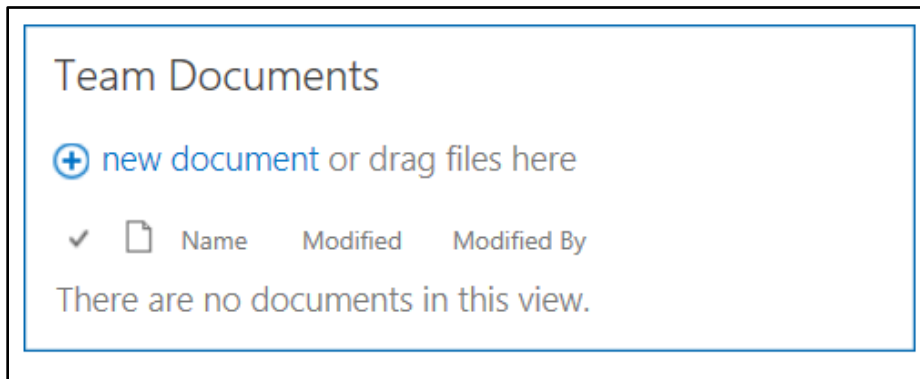


Figure 63 - Updated Web Part Title

### Deleting a Web Part

To delete a Web Part, use the following steps:

1. Hover the mouse pointer over the top right-hand corner of the Web Part you want to delete.
2. Click the **drop-down arrow** that appears.

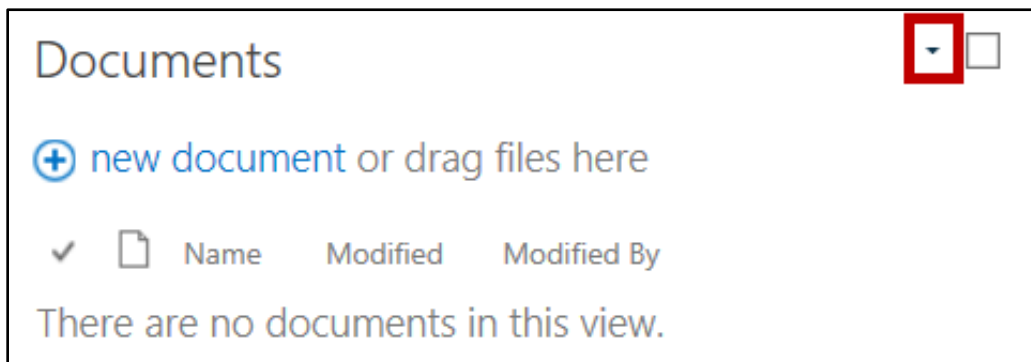


Figure 64 - Edit Web Part

3. Click **Delete**.

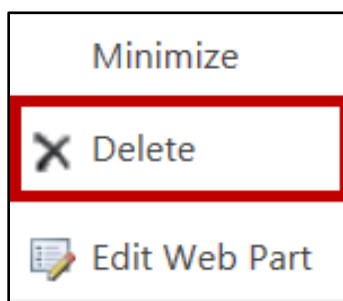


Figure 65 - Delete Web Part

## Adding Individual Content Items

When you add a Web Part to a page, you are adding a particular type of content by virtue of the item or Web Part that you choose in the *Ribbon*.

1. Click inside the Page Content area and select the **zone** you want to use (See Figure 66).
2. Click the **Insert** tab on the *Ribbon* (See Figure 66).
3. Click the button on the *Ribbon* for the **item** that you want to insert. For this example, a picture is selected (See Figure 66).

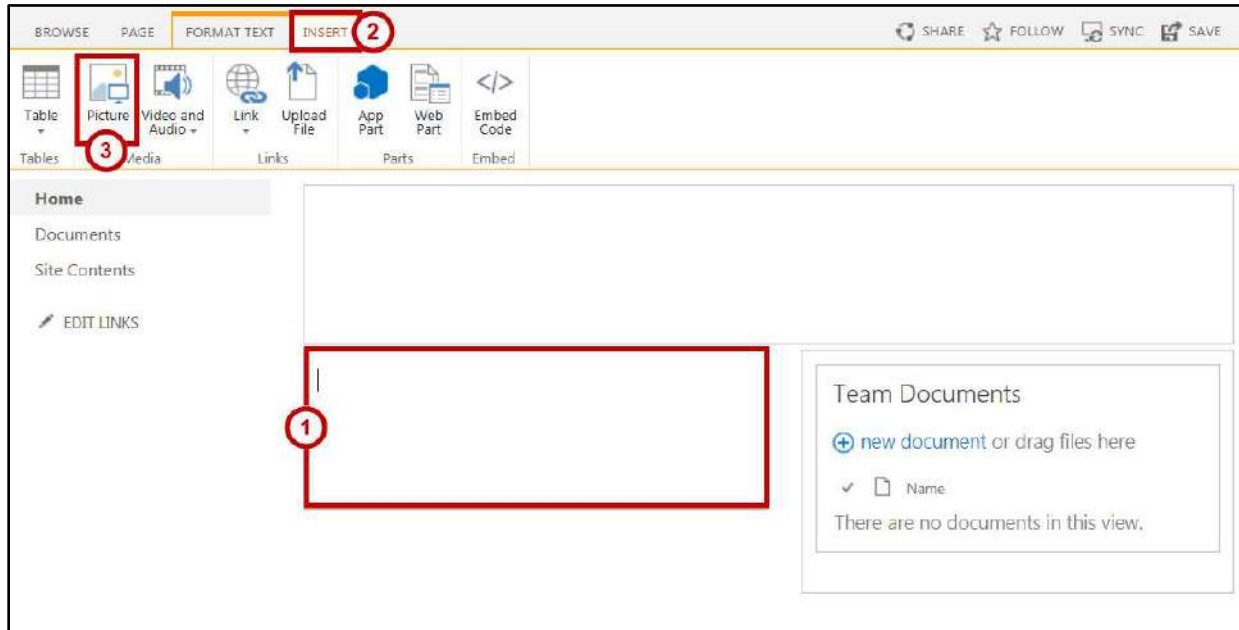


Figure 66 - Insert Item

4. Using the drop-down menu, select the **file location** of the picture you want to insert.

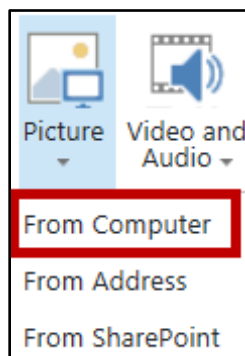


Figure 67 - Select File Location

5. Click **Browse** to locate your file.

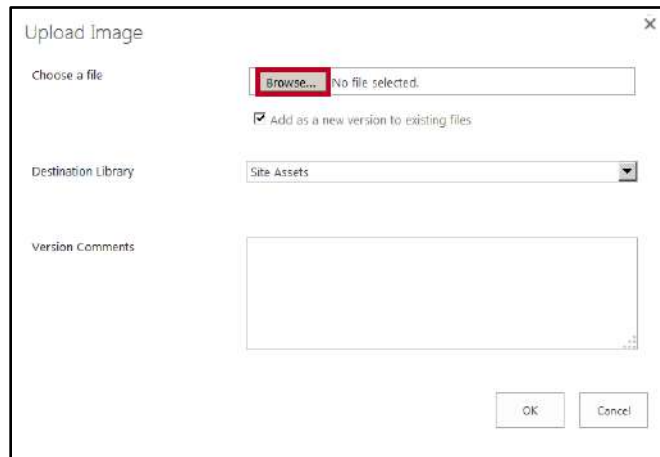


Figure 68 - Click Browse

6. Select the **File** you want to insert and click **Open**.

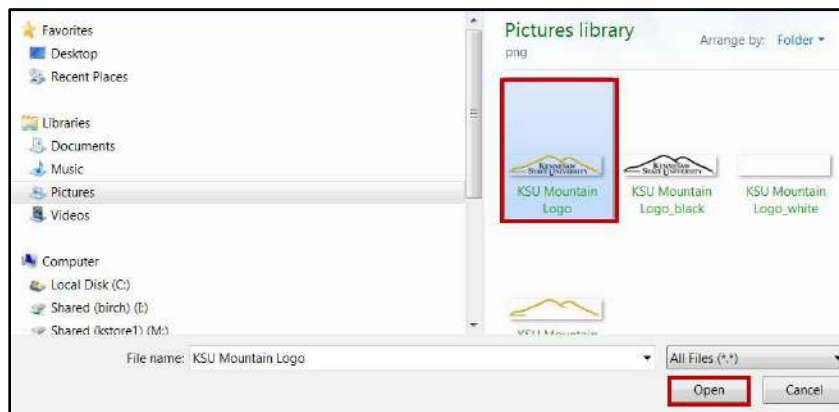


Figure 69 - Select File and Click Open

7. The file appears in the *Upload Image* window. Click **OK** to upload image to your site page.

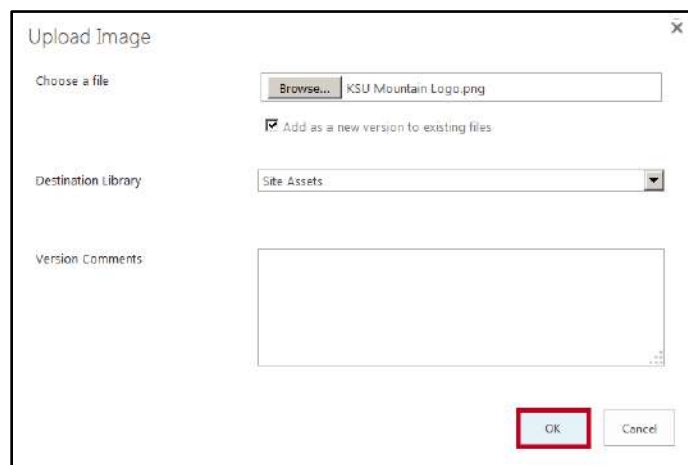


Figure 70 - Click OK to Upload Image

- The image now appears in the zone you selected. Use the tools on the *IMAGE* contextual tab to **edit** the image as needed directly on the site page.

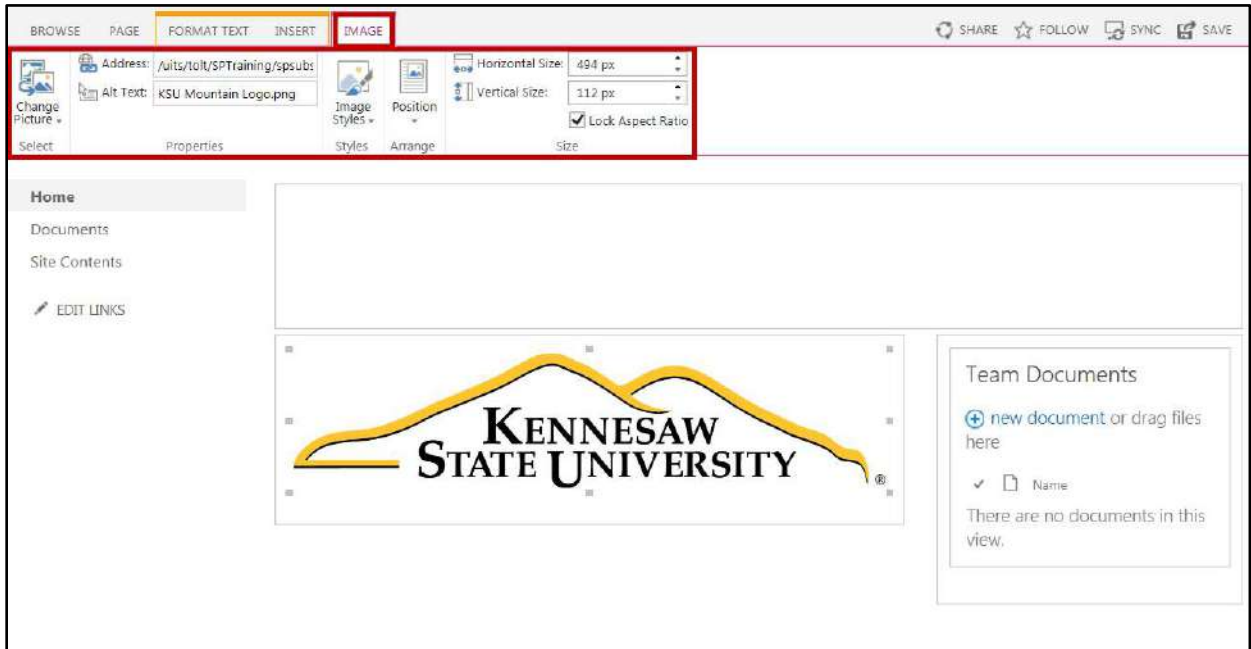


Figure 71 - Edit the Image

- You can add other elements and parts to your page zones as needed using the various page edit tabs.

### Saving a Page

When you have finished adding content to the page, you have several options for saving the page using the *Page* or *Format Text* tabs:

- In the *Ribbon*, click the **Page** tab (See Figure 72).
- Click the **Save** drop-down (See Figure 72).

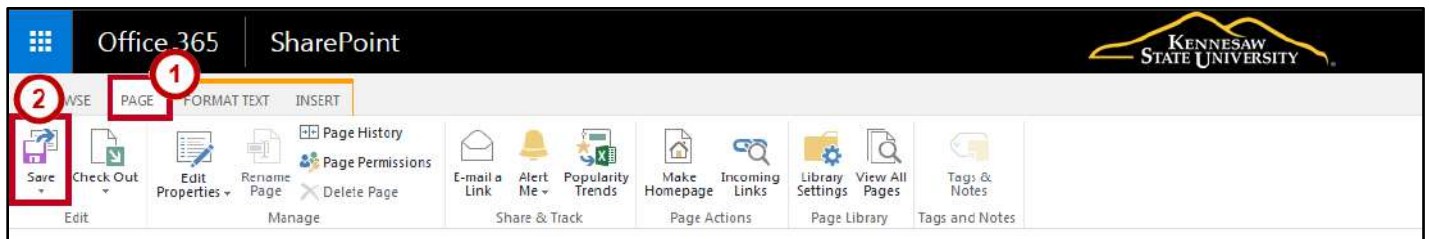


Figure 72 - Click Save

3. You have the following options:
  - a. **Save:** Saves the changes to the page and exits edit mode.
  - b. **Save and Keep Editing:** Saves the changes made to the page and allows you to keep editing.
  - c. **Stop Editing:** Exits edit mode on this page. You will be prompted to save or discard changes.

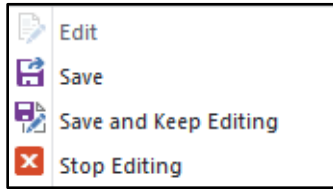


Figure 73 - Save Options

4. If you previously checked out the page, click **Check In**.

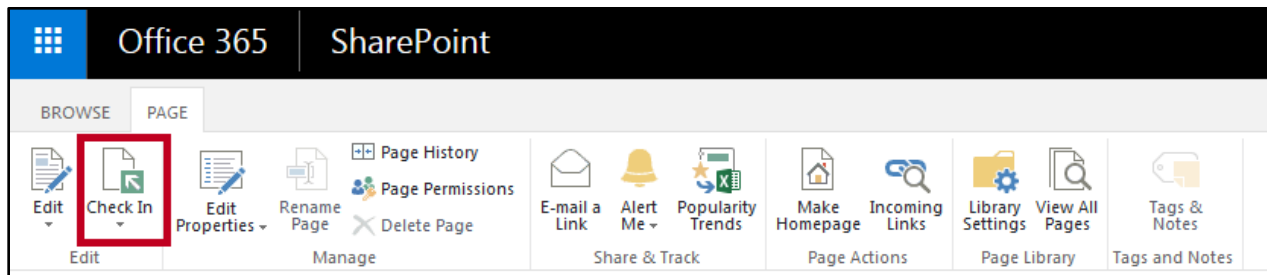


Figure 74 - Check In

5. You will have the following options:
  - a. **Check In:** This will check in the page, as well as save and close the page.
  - b. **Discard Check Out:** This closes the page without saving any changes.

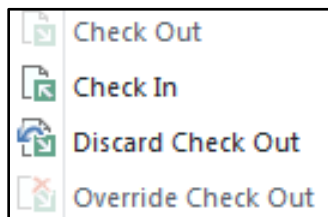


Figure 75 - Check in Options

**Important Note:** Once a page has been saved, if it has not been configured to display Pages on the top link bar or Quick Launch navigation, you will need to access the page by clicking **Site Content** at the bottom of the Quick Launch navigation, and then click **Site Pages** library.



## Editing a Page After Initial Configuration

1. Navigate to the **page** that you want to edit.
2. Click the **Page** tab (See Figure 76).
3. Click the **Edit** button (See Figure 76).

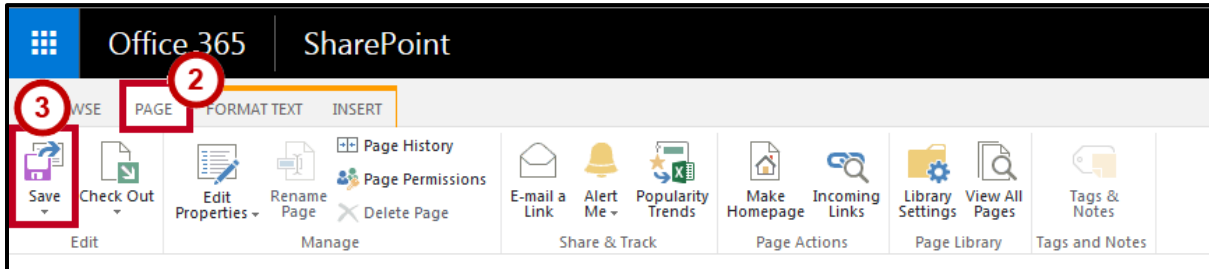


Figure 76 - Edit Page

4. Click in the **zone** you want to edit.

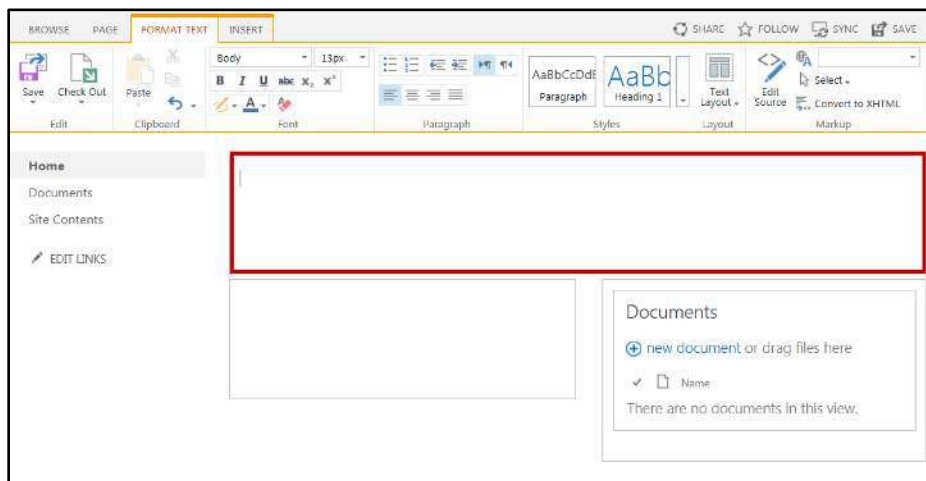


Figure 77 - Click in the zone you want to edit

5. On the *Ribbon*, use the tools on the **Format Text** tab to edit the text in the zones of the page.



Figure 78 - Format Text Tools

6. Use the tools on the **Insert** tab to insert tables, media, links, files, app and Web parts, or an embed code in the zones of the page.

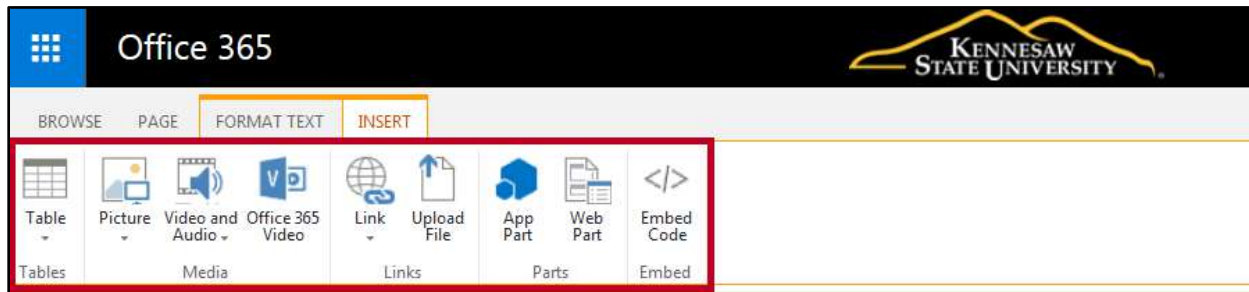


Figure 79 - Insert Tab Tools

7. Click the **Page** tab to save when you have completed editing.

## Working with Documents

Documents in SharePoint are stored in containers called Document Libraries, rather than in folders. Document Libraries, however, can be subdivided into folders, or even other Document Libraries. Document Libraries are listed in the *Quick Launch* on the left-hand side of the site window. Clicking on a Document Library displays the list of documents stored in that library. In addition to the name of the document, other information about the document, such as the author and the created date, is displayed. This information is called *metadata*.

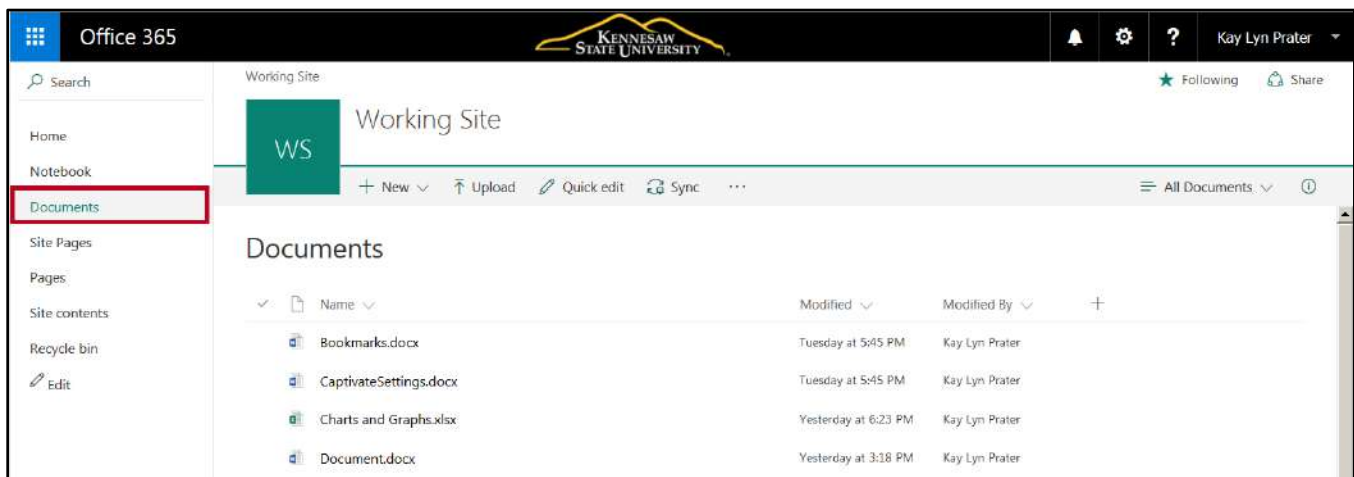


Figure 80 - Document Libraries

## Uploading Documents to a SharePoint Document Library

The easiest way to upload files is to simply drag the file into your document library file list. The file will automatically be uploaded into your library. To upload using the drop and drag method, use the following steps:

1. In the *Quick Launch* panel, click the **Document library** where you want the document to be stored (See Figure 81).
2. Click the **file(s)** you want to upload (See Figure 81).
3. Drag to any location on the library page (See Figure 81).

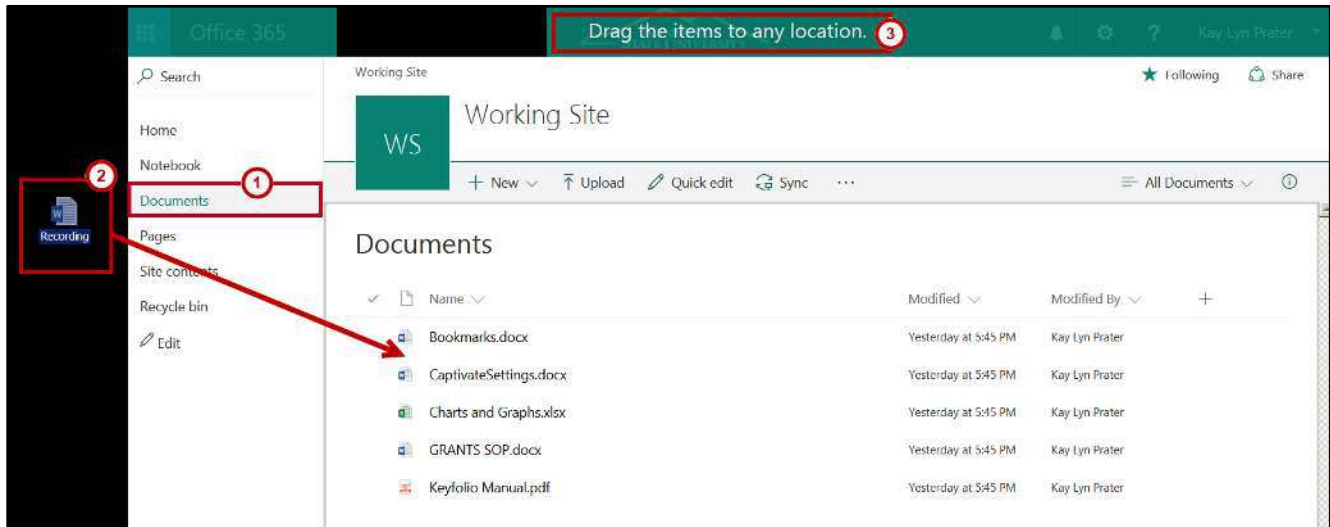


Figure 81 - Click and Drag

4. The file is now uploaded to the document library.

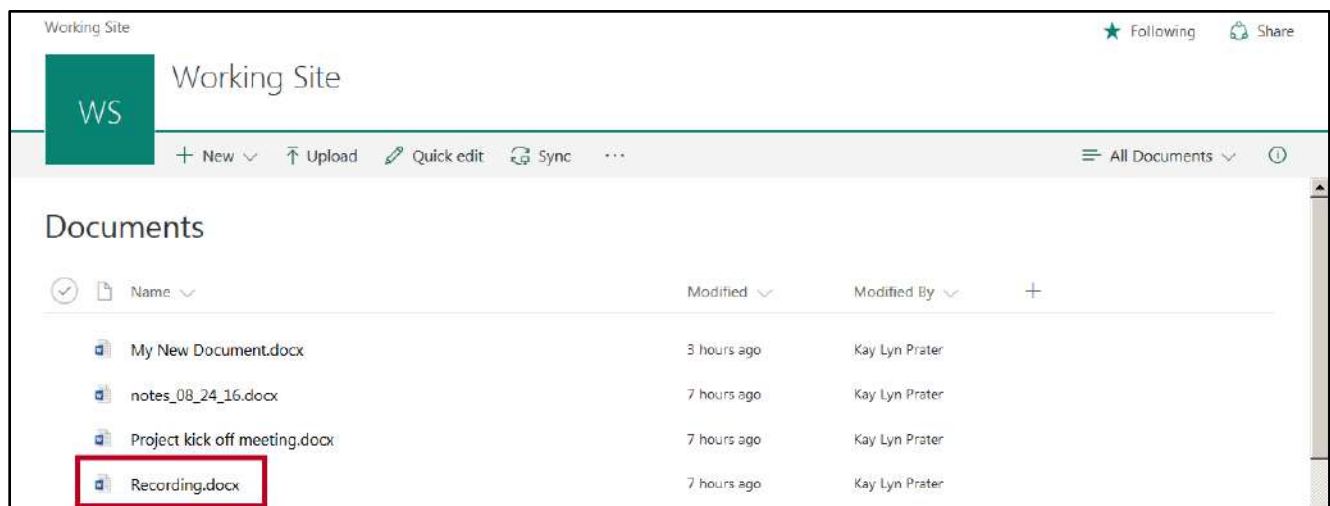


Figure 82 - Document Uploaded

You can also upload files and/or folders by following the steps below:

1. In *Quick Launch*, click the **Document Library** where you want your document stored (See Figure 83).
2. Click **Upload** (See Figure 83).

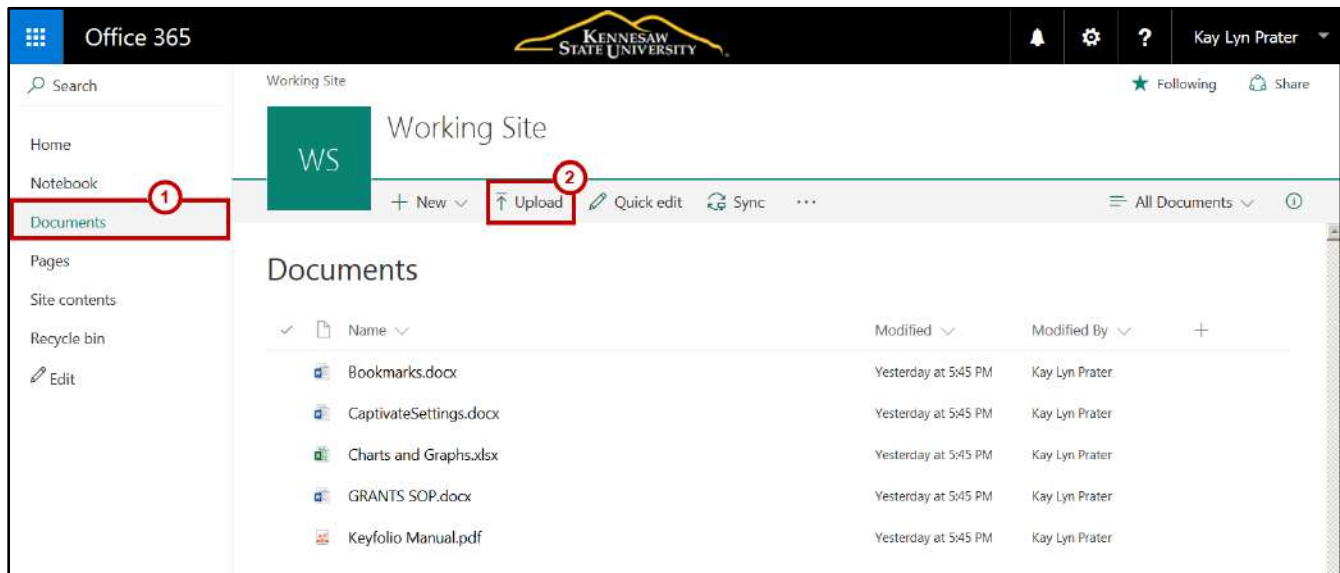


Figure 83 - Click Upload

3. The *File Explorer* will appear.
4. Select your **file(s)** from your computer, and click **Open**.

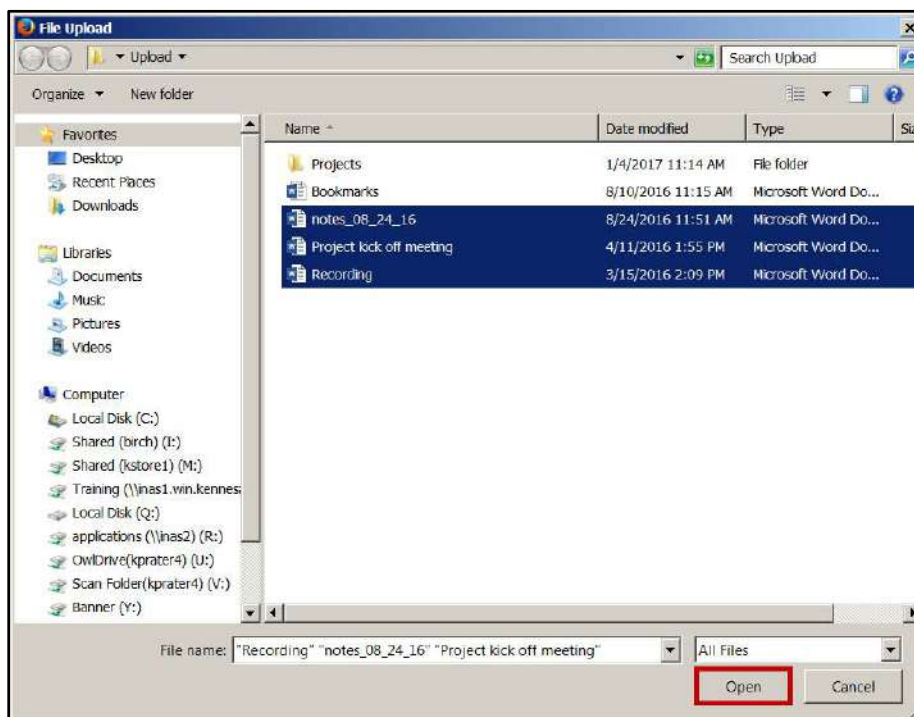


Figure 84 - File Upload

**Note:** Hold **CTRL** as you click to select multiple files to upload.

5. The toolbar will display the number of files being uploaded to the document library.

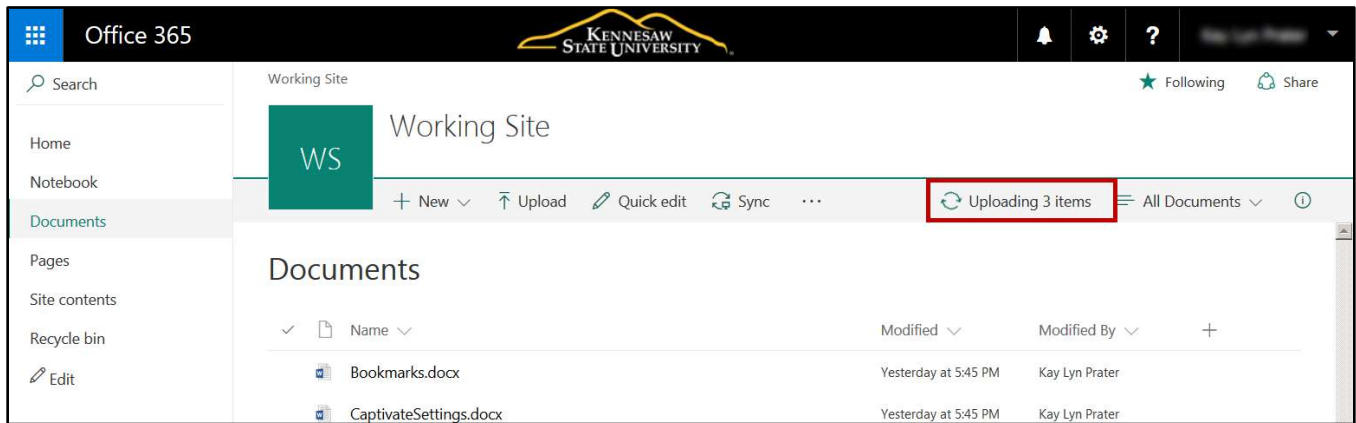


Figure 85 - Uploading Files

6. The file(s) is/are uploaded to the document library.

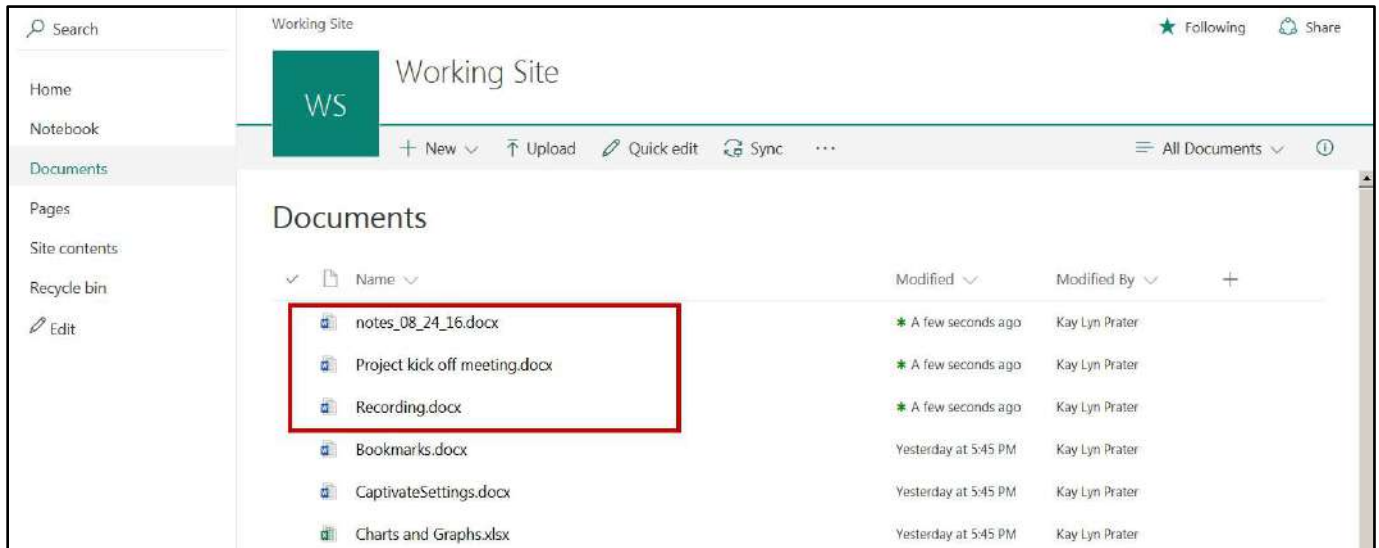


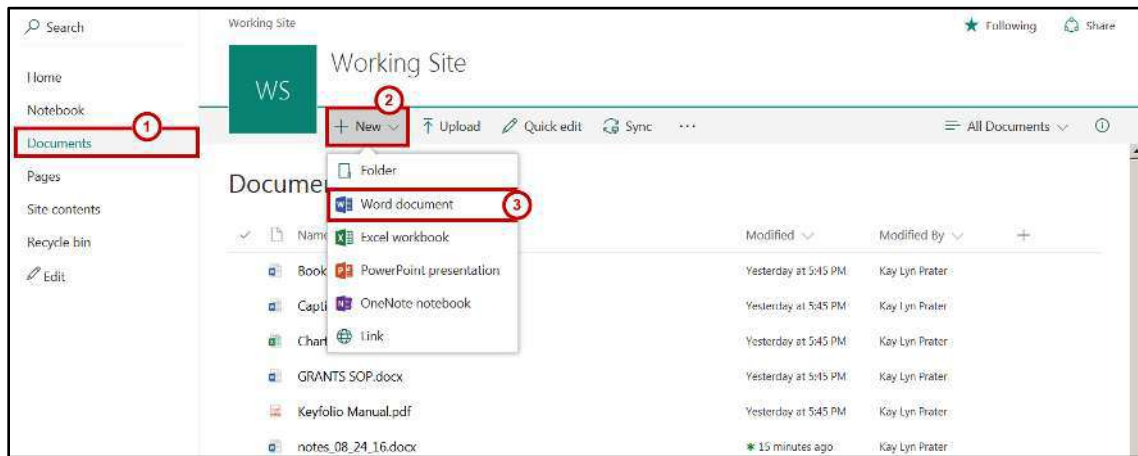
Figure 86 - File Uploaded Successfully

### Creating a New Document in a SharePoint Document Library

SharePoint is integrated with Microsoft Word, Excel, PowerPoint, and OneNote. As such, SharePoint uses these online apps to create new documents. The document will open in the version of *Office Online* that is suitable to the file (e.g. Word documents will open in *Word Online*, etc). Once created in the online app, if you have Microsoft Office installed on your computer, then you may open with the corresponding Office program.

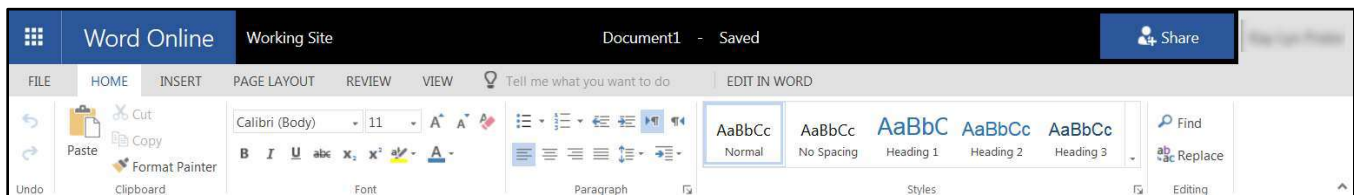
**To create a new document:**

1. In the *Quick Launch* panel, select the name of the **Document Library** in which you want to store the new document (See Figure 87).
2. Click **New** (See Figure 87).
3. A list will appear displaying options to create a new folder, web link, or various types of Office documents. For example, click **Word document**. (See Figure 87).



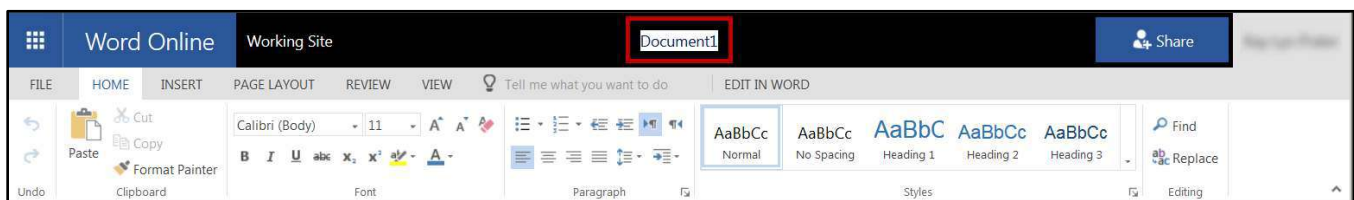
**Figure 87 - Create New Document**

4. *Word Online* will open with a blank document ready for you to edit.



**Figure 88 - New Document Created in Word Online**

5. To change the document name from within *Word Online*, simply click the **document name**.



**Figure 89- Click the Document Name**



6. Enter the **new document name** (See Figure 90).
7. When you have completed your edits and want to return to the document library, click the **site name** next to *Word Online* (See Figure 90).

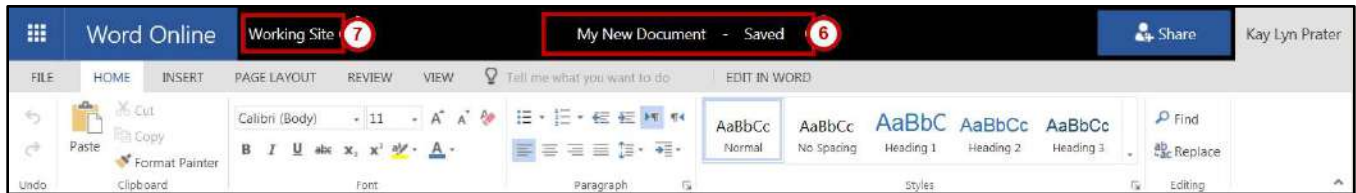


Figure 90 - Change the Document Name and Return to the Document Library

8. Your new document now appears in the selected SharePoint document library.

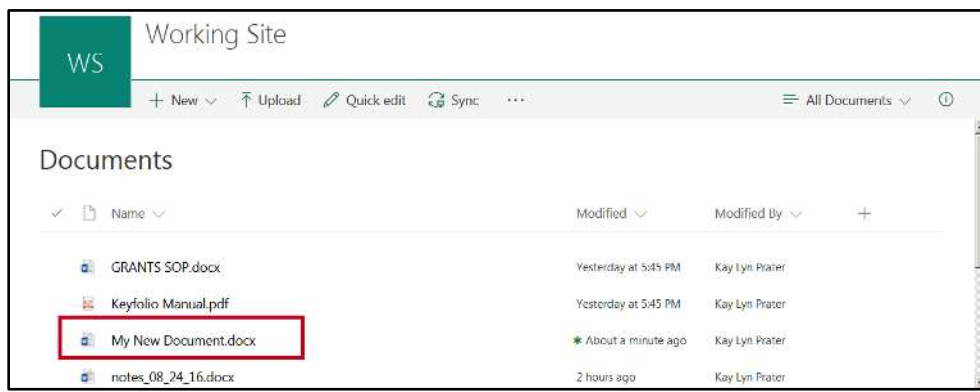


Figure 91 - Your New Document

## Opening Documents in a SharePoint Document Library

SharePoint Document Libraries allow you to access your *Microsoft Office* files and edit them online with the *Microsoft Office Online* set of tools, or open the file in the desktop version of Microsoft Office.

The following example will demonstrate how to open a Word document in Word Online, then continue editing the document in the desktop version of Word:

1. Click the **document name** in the Document Library list.

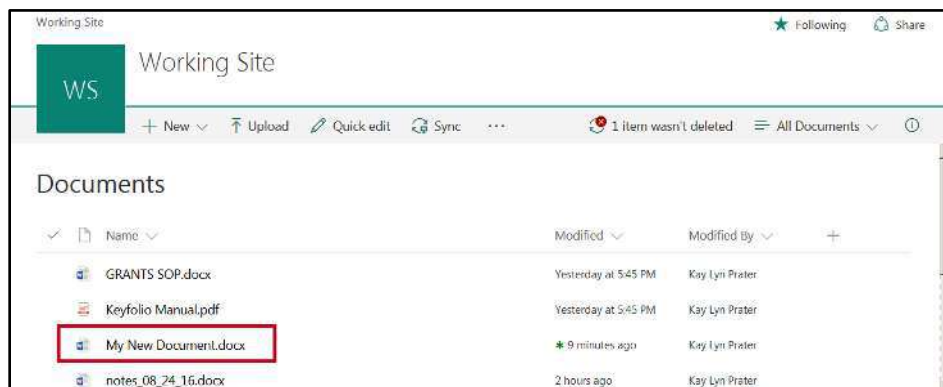


Figure 92 - Click the Document Name

2. The document will open in the version of *Office Online* that is suitable to the file (e.g. Word documents will open in *Word Online*, etc). You can preview the document, or choose to edit the document within your browser. Click **Edit Document**.

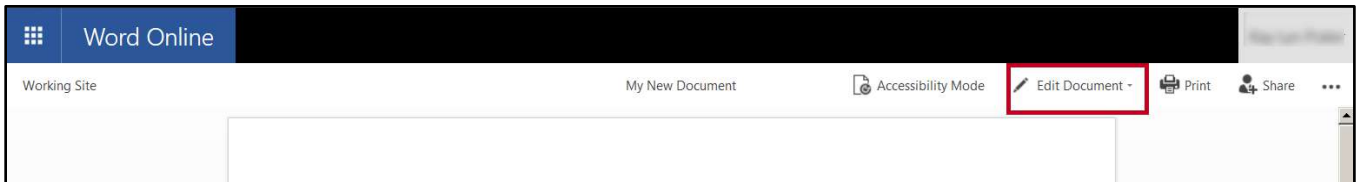


Figure 93 - Edit Document

3. A drop-down menu will appear with the following:
  - a. **Edit in Word**: If you have Microsoft Office installed on your computer, then the file will open with the corresponding Office program (See Figure 94).
  - b. **Edit in Browser**: You can select to edit the document in *Word Online*, or open the document in your desktop version of *Microsoft Word* (See Figure 94).

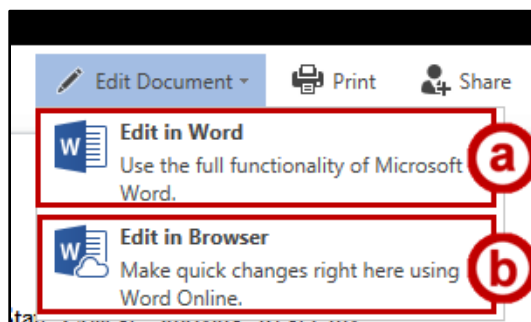


Figure 94 - Edit in Word or in Browser

4. When you have completed your edits and want to return to your document library, click the *SharePoint site name* next to *Word Online*.

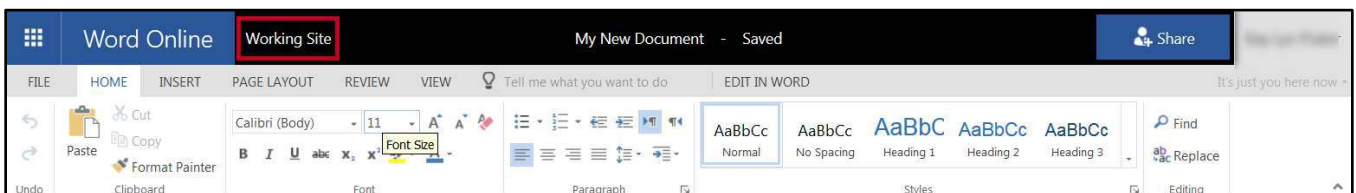


Figure 95 - Click the Site Name

5. You will be returned to your document library.



6. You can also open a document in the library by:
  - a. Clicking the space to the **left** of the document to select it (See Figure 96).
  - b. Clicking **Open** to reveal a drop-down with more options (See Figure 96).

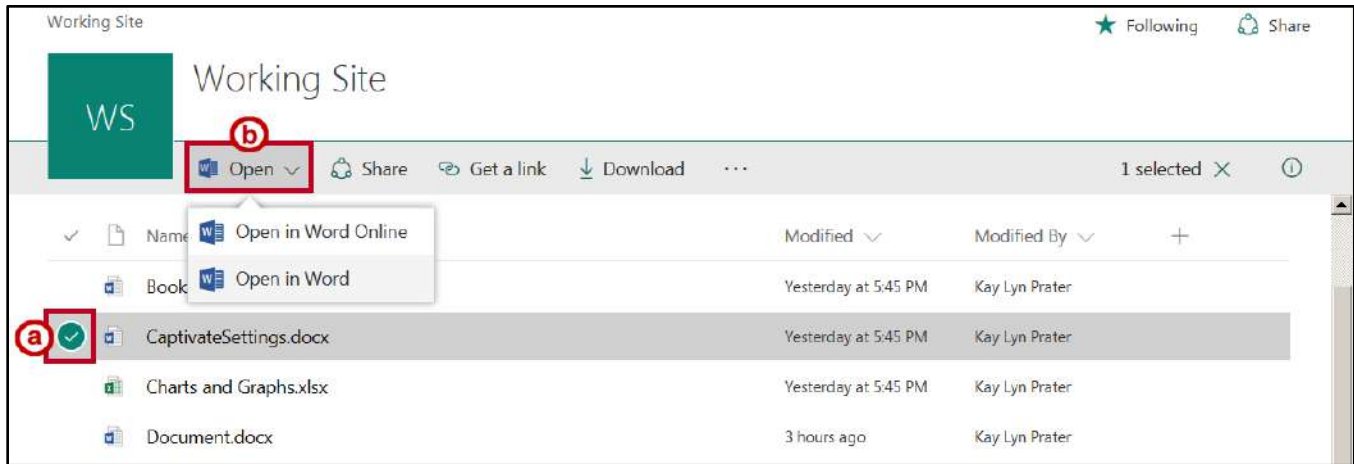


Figure 96 - Open a Document

7. When selecting *Open in Word* as in this example, a window will appear asking if you want to open the file. Click **Yes**.

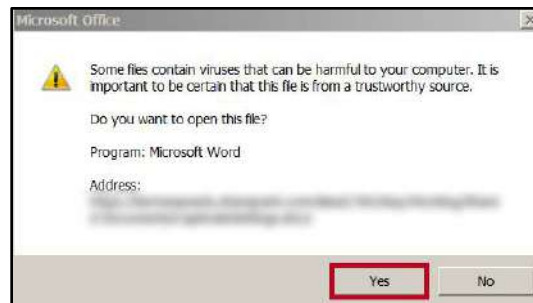


Figure 97 - Open File

8. The document will open in your desktop version of *Microsoft Office*.

## Document Check Out

If the document library has been configured to require document check in and check out, before you can edit a *SharePoint* document, you must first check out that document. Checking out a document prevents anyone else from editing the document until you check the document back in. Once the document is checked in, the document becomes available again to be checked-out by someone else. In addition, all changes made by the person who checked-in the document are now visible to others.

To check out a document:

1. Place a **check mark** in front of the document you want to check out (See Figure 98).
2. On the *Toolbar*, click the **ellipses** to reveal the options drop-down menu (See Figure 98).
3. In the resulting drop-down menu, click **Check out** (See Figure 98).

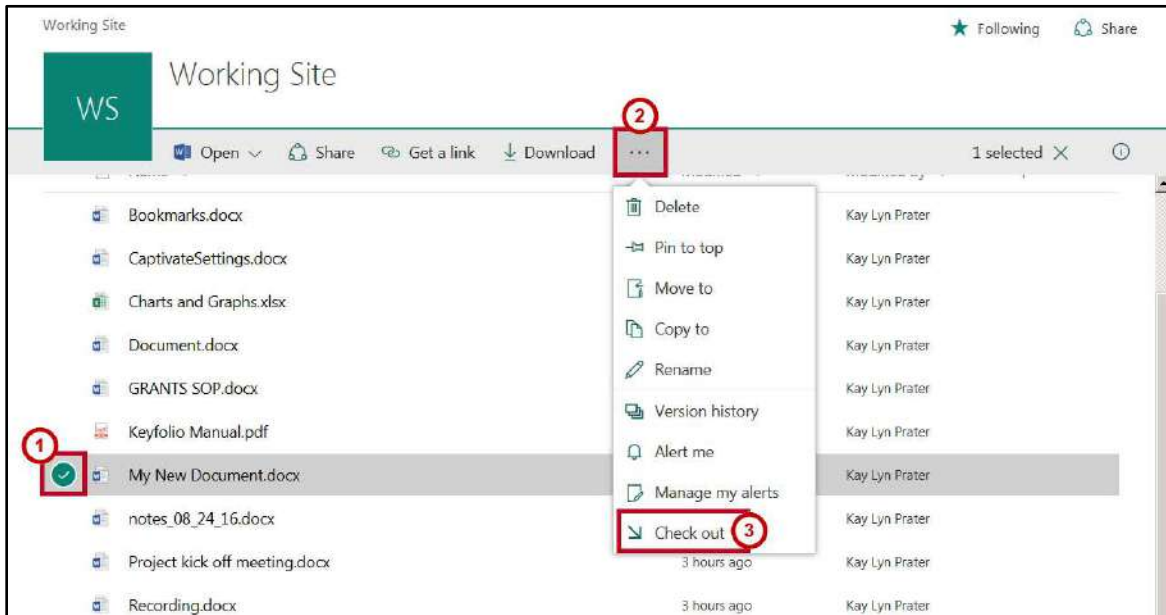


Figure 98 - Check Out Document

4. The icon next to the document selected now appears with a green and white arrow on it, indicating that it is checked out.

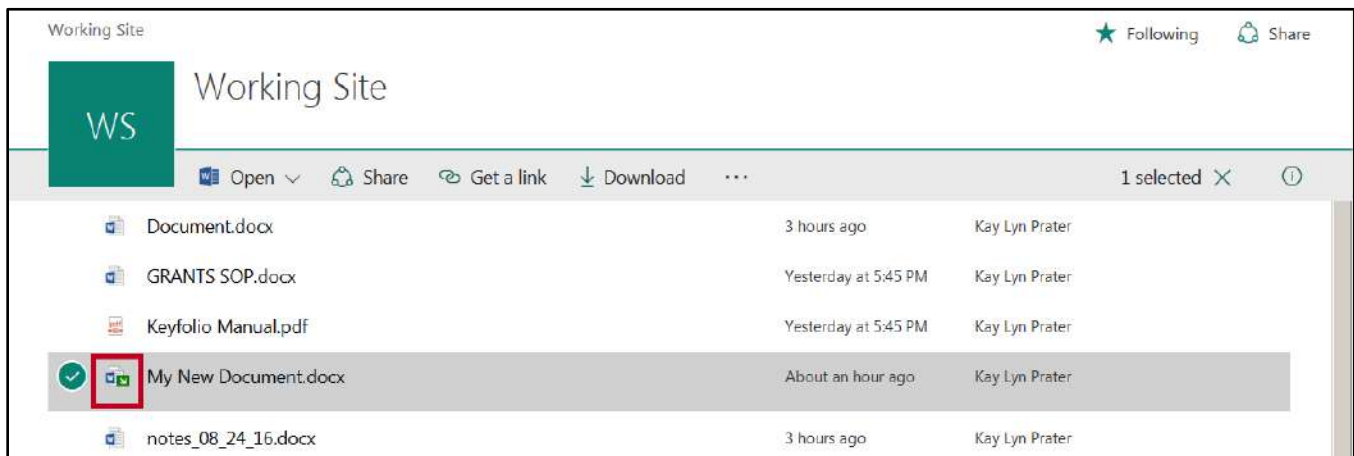


Figure 99 - Checked Out Document Icon

5. Click the **document** to open in the online application.

## Document Check In

To check in a document:

1. Place a **check mark** in front of the document you want to Check in (See Figure 100).
2. On the *Ribbon*, lick the **ellipses** to reveal the options drop-down menu (See Figure 100).
3. In the resulting drop-down menu, click **Check In** (See Figure 100).

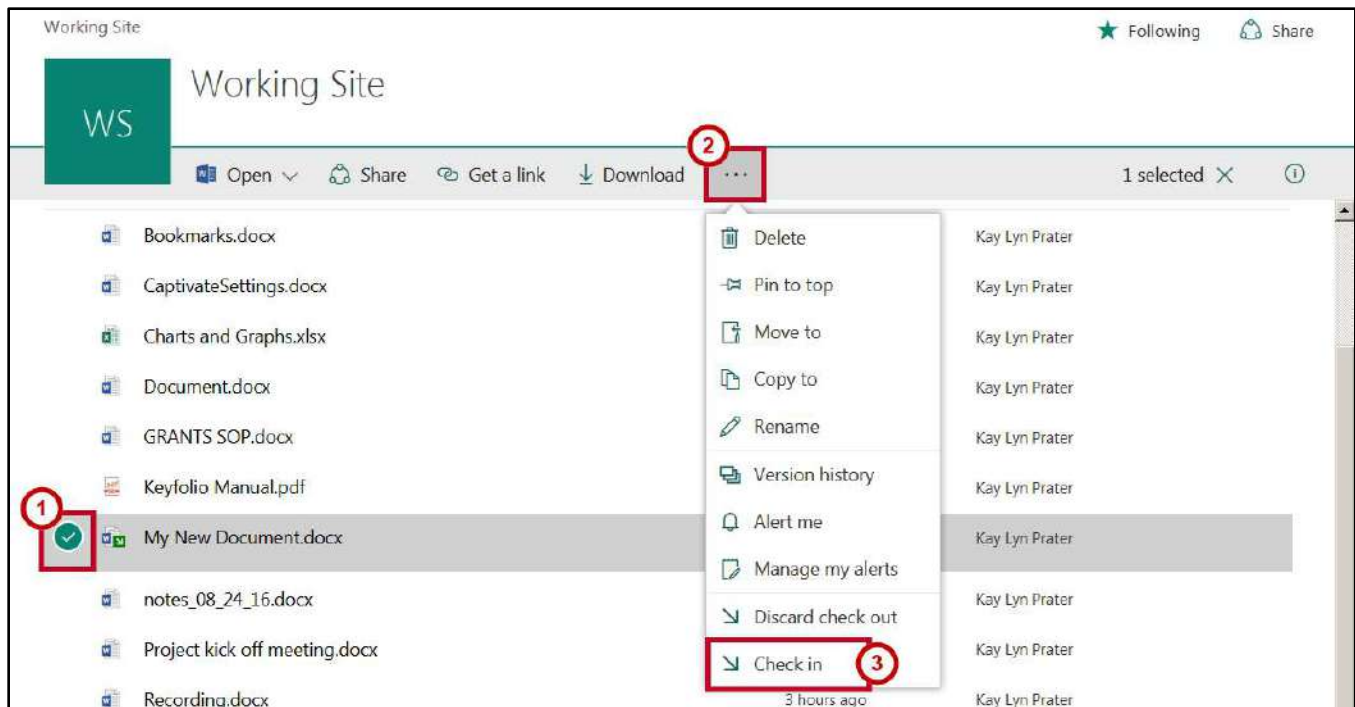


Figure 100 - Document Check In

4. If the document library has been configured to save major and minor revisions, the *Check in* window opens providing options for checking-in the document version.
  - a. The *version* type defaults to a draft or minor revision. To change to a major revision, click the **radio button** to the left of *Major version* (See Figure 101).
  - b. If you want others to be able to view your most recent changes, but you want to continue editing, click **Yes** to retain your check out. Otherwise leave the default setting of **No** selected (See Figure 101).
  - c. Type comments describing what has been changed in the current revision (See Figure 101).
  - d. Click **OK** to continue (See Figure 101).

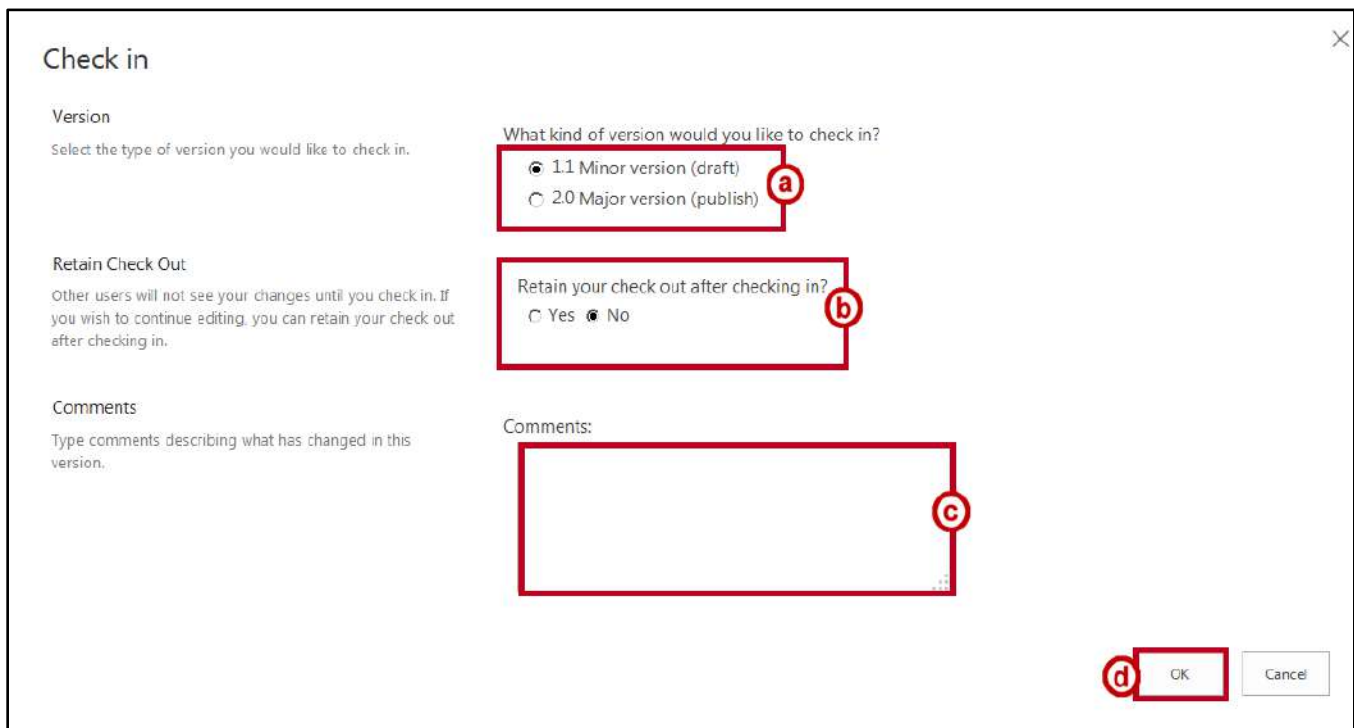


Figure 101 - Check in Window

5. The document is now checked in and the icon is removed from the document.

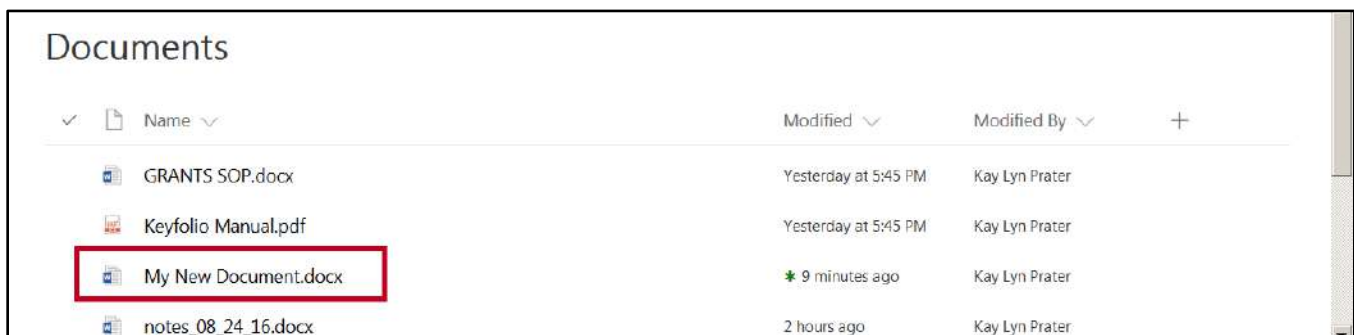


Figure 102 - Document Checked In

6. If you do not want to save a version of the document, in the drop-down menu, click **Discard check out**.

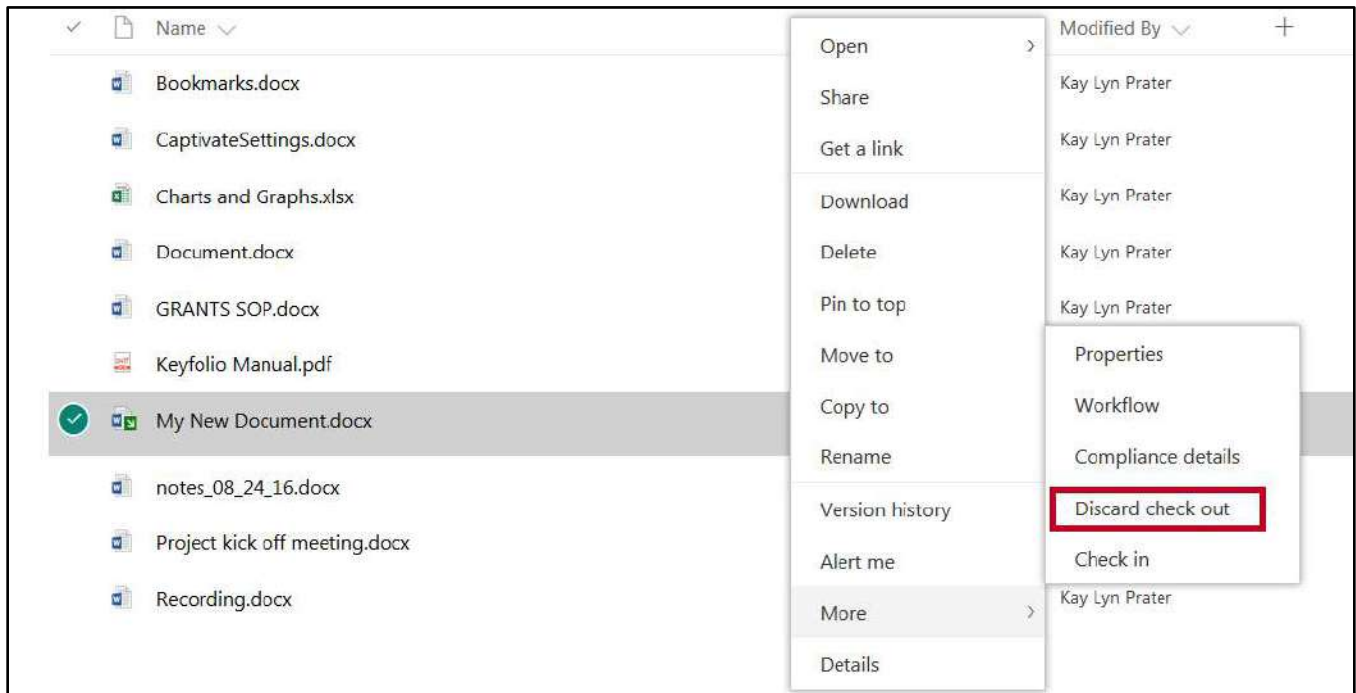


Figure 103 - Discard Check Out

If the document library is configured to save only major revisions of the document, the *Check in* box opens only with a *Comments* section.

1. Enter a **comment** to describe what has changed in the current version being saved.
2. Add your comments and click **Check in**.

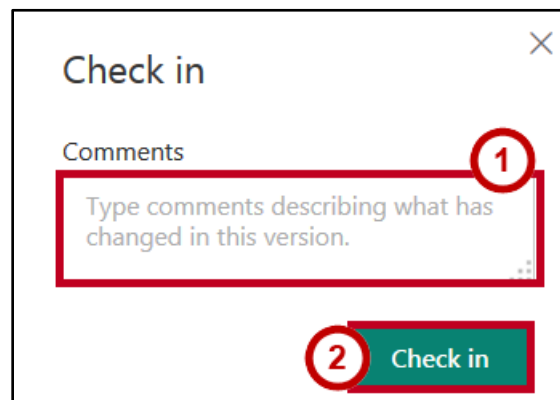


Figure 104- Check In

## Maintaining Document Versions

When versioning is enabled for libraries and lists, this allows tracking and management as things evolve in the library or list. You may view earlier versions of items and revert back to a prior version if needed. When versioning is configured for a document library, documents stored in that library are assigned versions when they are checked-in. Versioning can be set to create strictly major versions, or, major and minor versions. A major version is usually one that is ready for a larger group to see and review, whereas a minor version is a draft that someone is still working on.

A document can be edited only by those who have permissions to do so. If versioning has been applied to the document, a user who has editing permissions will, by default, see the most recent minor version of the document; a user who has only *read* permissions will see the most recent major version

### To open a specific version of a document:

1. Place a **check mark** in front of the document for which you want to view version history (See Figure 105).
2. On the *Toolbar*, click the **ellipses** (See Figure 105).
3. In the resulting drop-down menu, click **Version history** (See Figure 105).

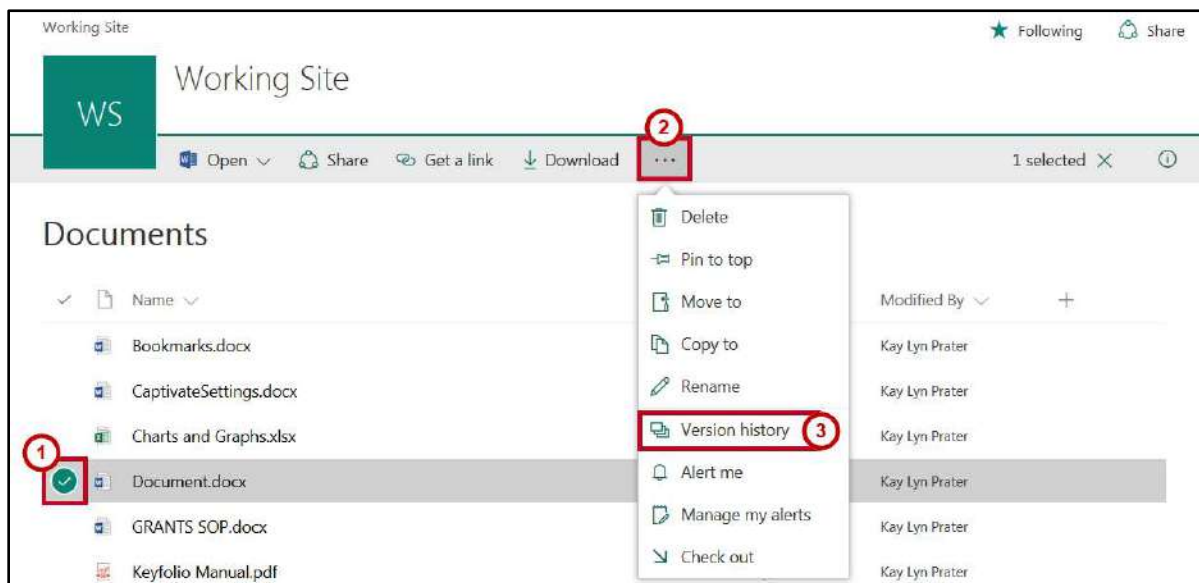
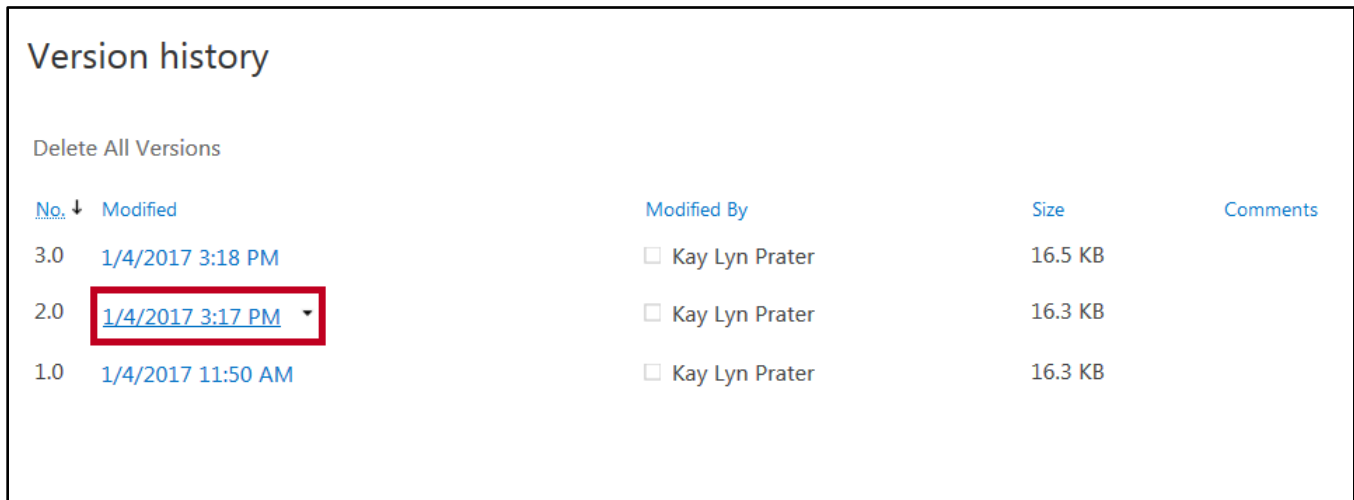


Figure 105 - Version History

4. The *Version history* window displays each version of the document, including date modified, modified by information, and any comments entered for the revision.

5. Click the version **date** you want to open.



No. ↓	Modified	Modified By	Size	Comments
3.0	1/4/2017 3:18 PM	<input type="checkbox"/> Kay Lyn Prater	16.5 KB	
2.0	1/4/2017 3:17 PM	<input type="checkbox"/> Kay Lyn Prater	16.3 KB	
1.0	1/4/2017 11:50 AM	<input type="checkbox"/> Kay Lyn Prater	16.3 KB	

Figure 106 - Version History Information

**Note:** You should only modify the latest version of the document.

6. The document will open in the corresponding desktop application (versioning is not available in the online applications). The following options will be displayed:
- Click **Compare** to review a comparison of the document revisions (See Figure 107).
  - Click **Restore** to make the previous version the latest revision (See Figure 107).

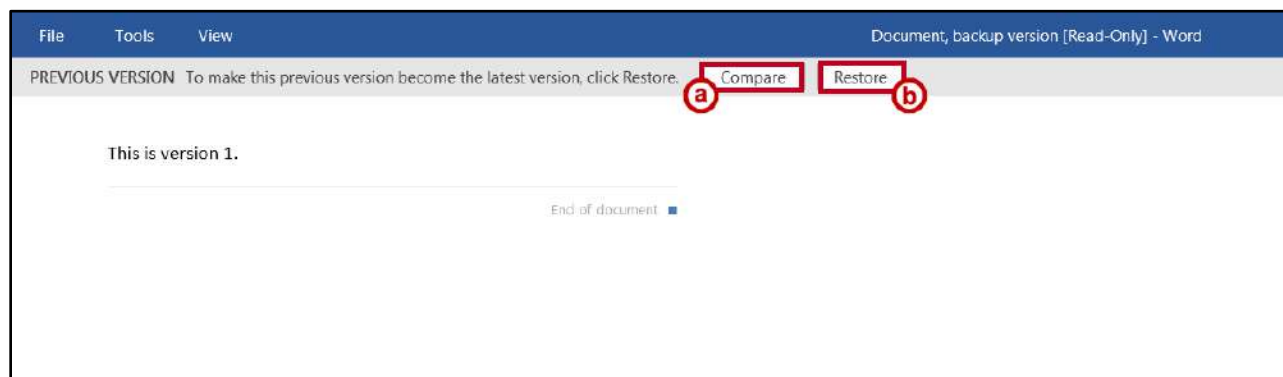


Figure 107 - Version Options

7. When selecting *Compare*, all versions of the document are displayed in the application.

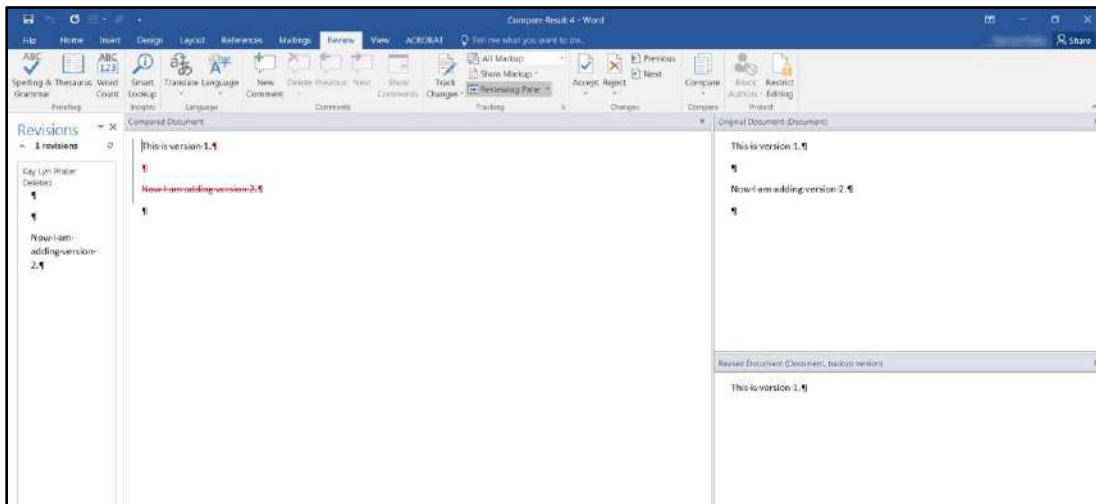


Figure 108 - Document Version Display

**Note:** If document check in and check out is configured as required, you must check out the document before making any modifications to the versioning.

## Moving and Copying Documents

### Moving Files into Folders

1. To create the new folder:
  - a. Click **New** in the toolbar (See Figure 109).
  - b. In the resulting drop-down, click **Folder** (See Figure 109).

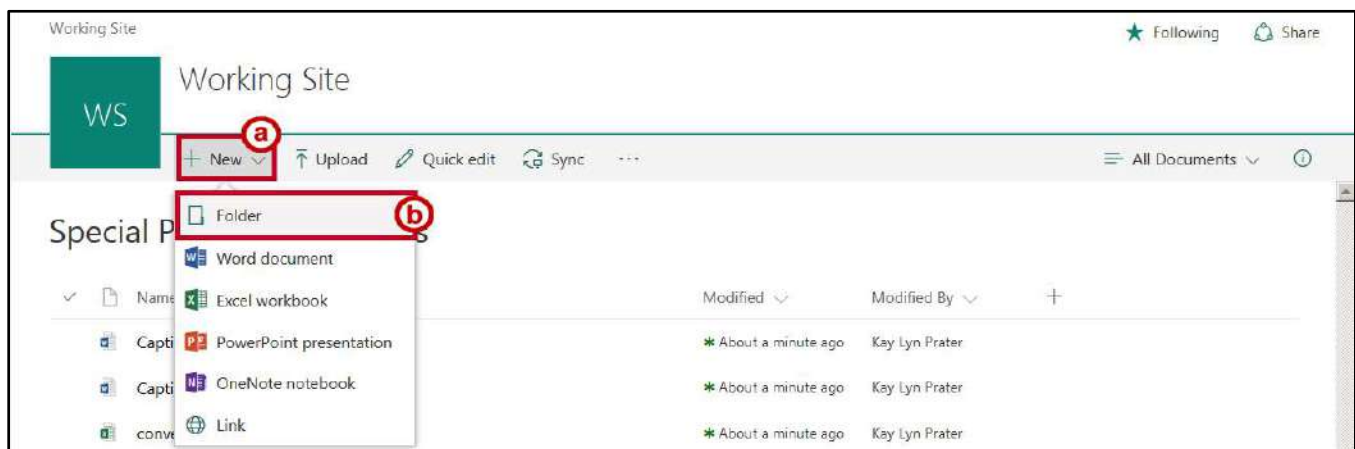


Figure 109 - Create Folder



- c. Enter a **name** for the folder (See Figure 110).
- d. Click **Create** (See Figure 110).



Figure 110 - Enter Folder Name

- e. The folder is displayed in the document library.
2. To move a file into a folder, simply drag it on top of the desired **folder**, then release. The file will be moved into the folder.

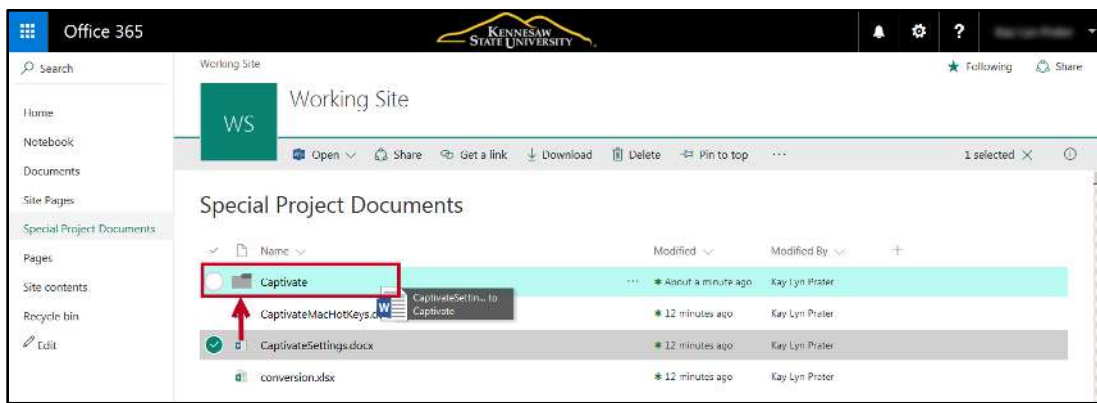


Figure 111 - Left-Click and Drag Files on to Folders

3. You can also select multiple files by clicking the **space to the left of the file**, then dragging the group to the folder.

### Moving Files from One Folder to Another

1. Select the **files** to move (See Figure 112).
2. Click **Move to** in the toolbar (See Figure 112).

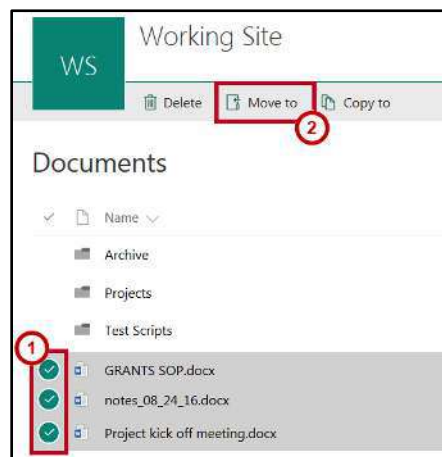


Figure 112 - Move To

3. File location options will appear to the right. Click a **folder** destination (See Figure 113).
4. Click **Move here** (See Figure 113).

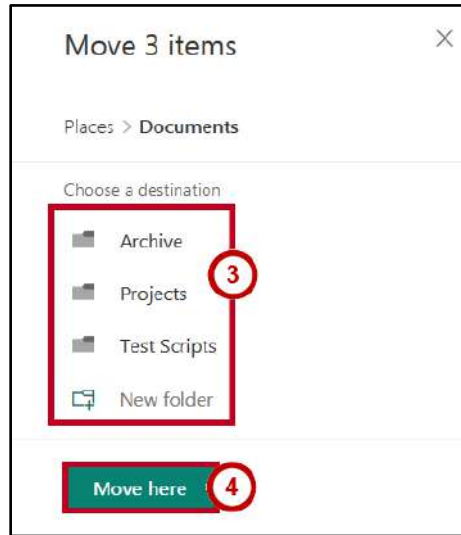


Figure 113 - Move Files to Destination

### Copy Files from One Folder to Another

1. Select the **files** to move (See Figure 114).
2. Click **Copy to** in the toolbar (See Figure 114).

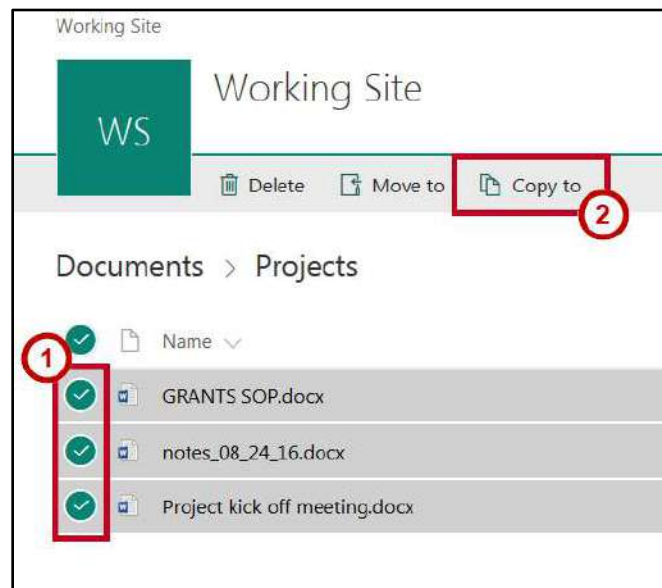


Figure 114 - Copy To

- File location options will appear to the right. Click a **folder** destination (See Figure 115).
- Click **Copy here** (See Figure 115).

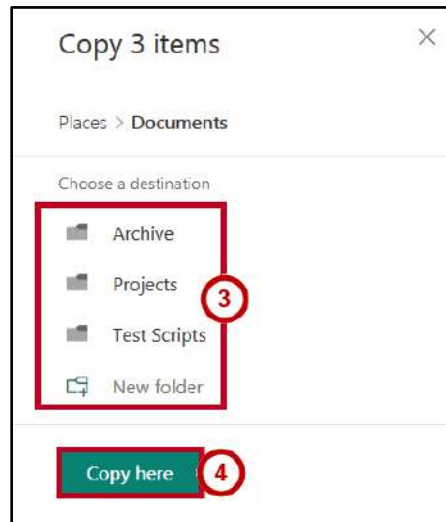


Figure 115 - Copy Files to Destination

### Using File Explorer to Move or Copy Between Libraries

The File Explorer view allows you to drag and drop files into your library, create folders, move and copy files, and delete files in your library. It is only available using Internet Explorer. The following explains how to use View in File Explorer:

- Navigate to the **document library** containing the files you want to copy or move (See Figure 116).
- Click the **All Documents** drop-down (See Figure 116).
- Click the **View in File Explorer** (See Figure 116).

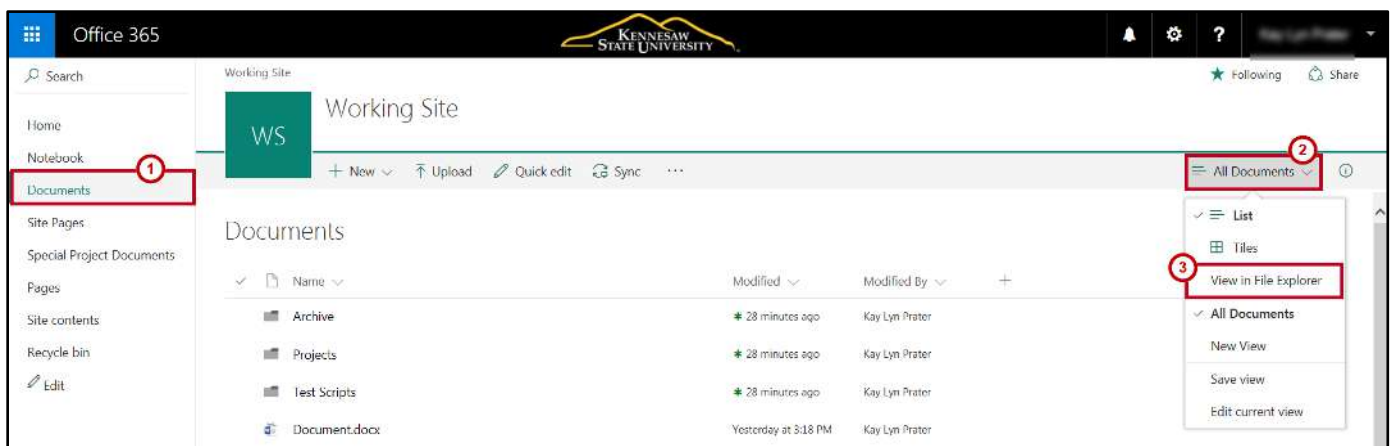


Figure 116 - View in File Explorer

- A Microsoft *File Explorer* window opens for the original library.
- Navigate to the **document library** to which you want to copy or move the folders and/or files.
- Follow steps 2 and 3 above.

7. Now you have two *Explorer* windows open—one for the origin library (See Figure 117) and one for the destination library (See Figure 118). Highlight the **Files and Folders** you want copy or move.

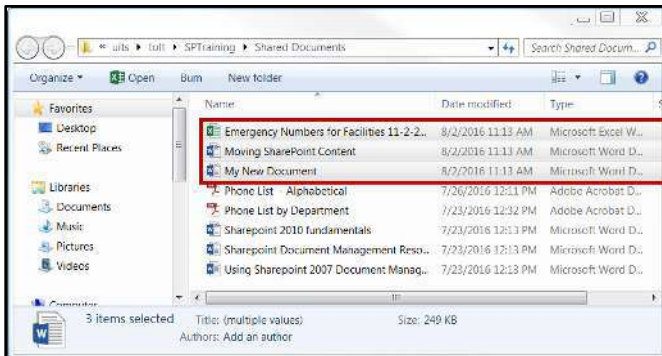


Figure 117 - Origin Library

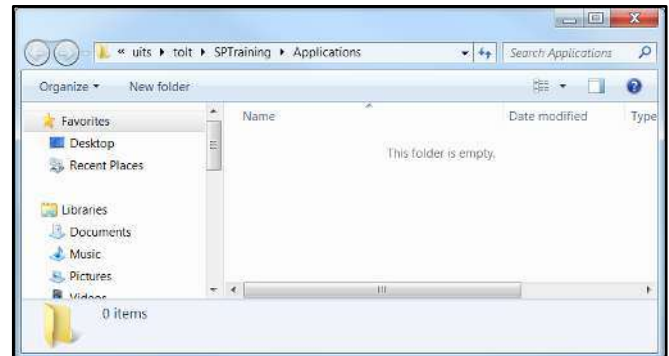


Figure 118 - Destination Library

8. To **move** files:
- Drag the highlighted files to the **destination library** location and drop in the open *Explorer* window.

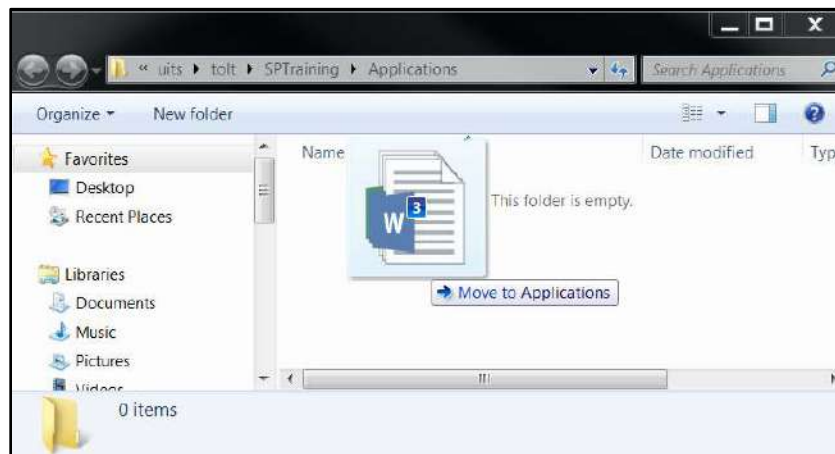


Figure 119 - Drag and Drop Files to Destination Library

- The files are moved from the origin library to the destination library.

9. To **copy** files:

c. Right-click the **highlighted files** in the origin library and select **Copy** in the drop-down list.

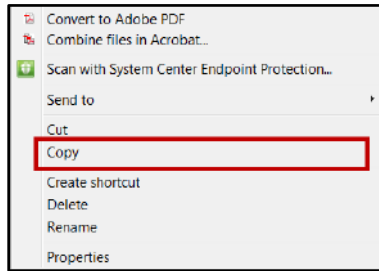


Figure 120 - Click Copy

d. Right-click inside the **destination library** window and select **Paste**.

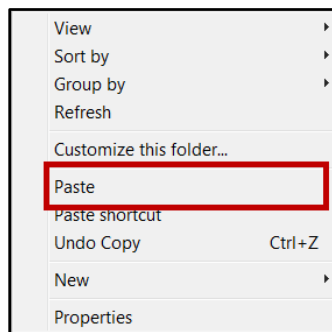


Figure 121 - Select Paste

## Searching for Documents and Pages

You can search the site for content by using the **Search** box that is on each page of a SharePoint site. You can search for files by using the **Find a file** search box on your document library pages. The **Search** box contains a drop-down box to allow you to choose what type of content you are looking for while the **Find a file** search box searches the particular library you are in for key words entered.

### Searching in a Site

When you are looking for content, but are not sure where it is located, start your search at the highest site where you think the information might reside. You can then refine the results in order to find the information. You can look for content by entering keywords or a specific phrase.

1. Go to the **site** you want to search. Site search results do not include content on a parent site or on adjacent sites. Make sure you're at the top site for the search results you want.

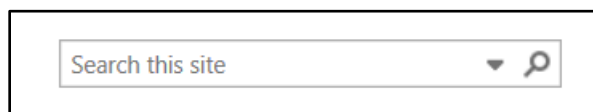


Figure 122 - Search this site

2. Type the **word or phrase** that you want to look for (See Figure 123).
3. In the search box, click the **drop-down arrow**, to select how to search (See Figure 123).

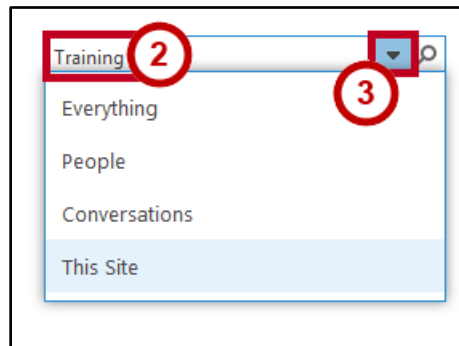


Figure 123 - Select What and How to Search

4. In the search drop-down box, you have four options:
  - a. **Everything:** Searching everything in the site collection. You will have filter options based on content type, author, modified date, etc.
  - b. **People:** Uses delve to search for people in your site collection with content containing the word or phrase entered.
  - c. **Conversations:** Conversations are not currently enabled on any KSU SharePoint site.
  - d. **This Site:** Searching all site content for the word or phrase entered. You will have filter options based on content type, author, modified date, etc.
5. In this example, we will search the site. Click **This Site**.

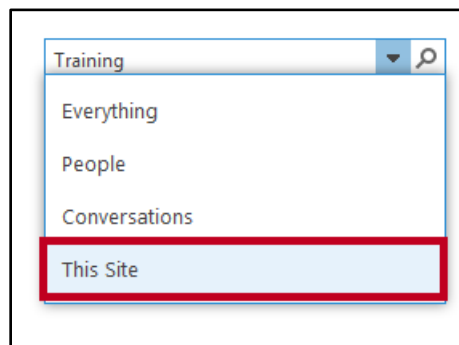


Figure 124 - Click This Site

6. Click **Search**.

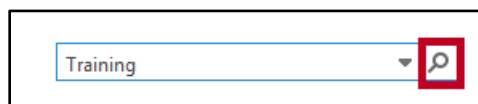


Figure 125 - Click Search

5. The *Search Results* window will appear.
  - a. The documents containing content related to the term you entered will appear on the right. Simply click on the **content link** to open the document (See Figure 126).
  - b. In the *Quick Launch* window to the left, click on an item listed in **Result type** or **Author** to limit your results (See Figure 126).

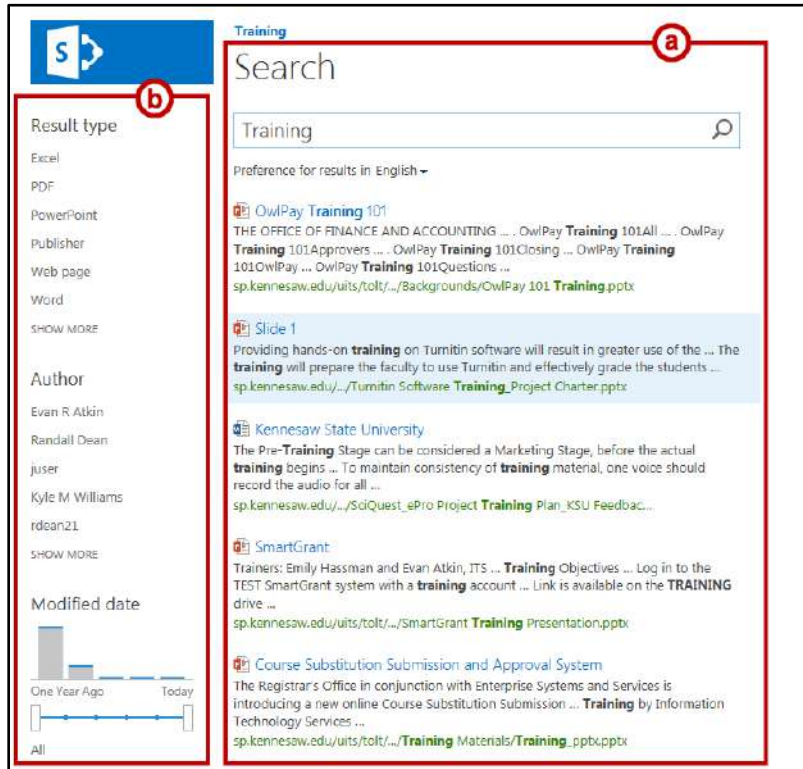


Figure 126 - Search Results Window

## Searching in a List or Library

When you're sure that the content you are looking for resides in a list or library, start the search on the page where the list or library resides.

## Connecting a Calendar or List with Outlook

You can synchronize calendars and lists with Outlook and make them available offline through Outlook. The following explains how to synchronize a calendar:

1. Select the **calendar** or **list** in *SharePoint Quick Launch*.
2. Click the **Calendar** tab (See Figure 127).
3. In the Ribbon, click **Connect to Outlook** (See Figure 127).

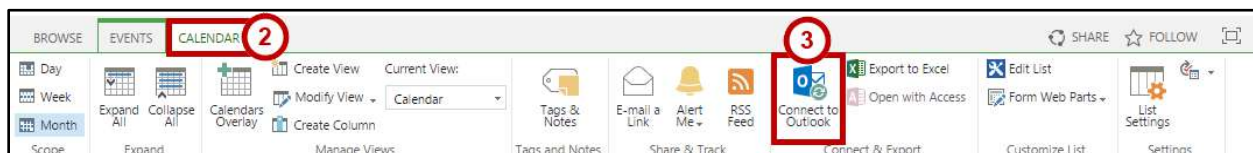


Figure 127 - Connect to Outlook

4. Click **Yes** in the dialog box. Outlook opens and displays the calendar or list that you synchronized.

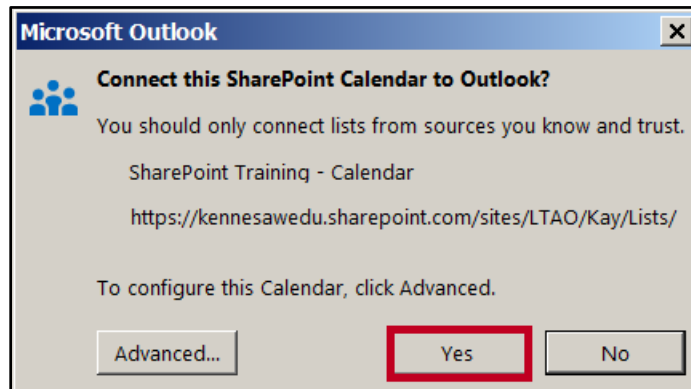


Figure 128 - Connect to Outlook

## Additional Help

For additional support, please contact the KSU Service Desk:

### KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
- Email: [service@kennesaw.edu](mailto:service@kennesaw.edu)
- Website: <http://uits.kennesaw.edu>