

THE EXPERT'S VOICE® IN SHAREPOINT

FOURTH EDITION

# SharePoint 2013 User's Guide

Learning Microsoft's Business Collaboration Platform

*MASTER THE FEATURES  
AND CAPABILITIES OF THE  
SHAREPOINT 2013 PLATFORM*

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# Introduction

SharePoint 2013 is Microsoft's business collaboration platform. It offers web management, content management, reporting, search, and social capabilities that can be brought together to yield comprehensive business solutions. The solutions this platform allows can be created more quickly and are more cost effective than custom-developed solutions, and what is more, the platform provides a far greater degree of flexibility than packaged solutions can.

That said, in many situations where SharePoint is introduced, people struggle to understand and use the platform. In other situations people have difficulty expanding their use of SharePoint from a basic intranet or document management environment to a business solution platform. This book addresses these struggles and needs. It is meant to serve as a complete reference to all the capabilities available in SharePoint to help you understand how to configure and use them.

This book was created for SharePoint users at all levels. Beginners are introduced to information to help them make effective use of the capabilities the platform offers. Intermediate users are provided the details they need to manage SharePoint resources. Advanced users are offered a foundation upon which to understand all of the capabilities the platform contains and are shown how to create solutions that take advantage of these capabilities.

A deep knowledge of the capabilities available in SharePoint, experience working with a variety of organizations, and an understanding of how to successfully combine them to reach effective business solutions: all these have been brought between the covers of this book. I hope this information will enable you to gain an in-depth understanding of SharePoint 2013 and more effectively manage and use the platform.

## Whom This Book Is For

The goal of the book is to provide the knowledge anyone needs to use the Microsoft SharePoint 2013 platform. Whether you are new to SharePoint, are moving from a previous version, or are a longtime user, this book will give you the information you need to take effective advantage of the capabilities of SharePoint Foundation 2013 and SharePoint Server 2013.

If you are looking for a resource that offers you an easy-to-follow and detailed understanding of SharePoint, this book is for you. As a user guide, it does not require you to have any programming knowledge. It does, however, assume you have a basic understanding of web sites and how to navigate them. Some topics also require a working knowledge of Microsoft Office applications, such as Word and Excel.

## How This Book Is Structured

This book organizes the capabilities of the SharePoint platform into a format that serves as an end-to-end reference guide, a guide you can read through to learn about all SharePoint has to offer or to look up specific topics. It includes step-by-step instructions, figures, tables, and examples. Its chapters describe all of the SharePoint capabilities so that you can use them as building blocks for solutions.

## Chapter 1: Introduction to SharePoint Technologies

This chapter introduces you to what SharePoint is and the capabilities it offers. It describes what's new in this 2013 version and its uses and benefits.

## Chapter 2: Understanding Sites

This chapter provides an overview of site collections and sites and describes their structures and components. Included is a review of the various site templates available in SharePoint Foundation and SharePoint Server, along with details of their purposes, layouts, and features.

## Chapter 3: Working with Sites

In this chapter you are given an understanding of how to manage sites. You learn how to create sites, navigate them, and manage their security, layouts, structures, and features.

## Chapter 4: Pages, Apps, and Web Parts

Pages, apps, and web parts are used to organize and present information to site users and to incorporate business solutions into a SharePoint environment. This chapter shows you how to create and configure the various types of pages available through SharePoint and how to configure web parts and app parts within them.

## Chapter 5: Managing Lists and Libraries

Lists and libraries store the content managed in the SharePoint environment. In this chapter you learn how to create and manage lists and libraries, including how to configure columns and work with views.

## Chapter 6: Working with Lists

This chapter details the different types of lists SharePoint offers and describes their structures and views. You also learn how to create and manage items in these lists.

## Chapter 7: Working with Libraries

In this chapter the different types of libraries available in SharePoint are discussed, as well as how to add and manage their content. You also learn about the various advanced features different types of libraries make available.

## Chapter 8: Working with Site Columns, Content Types, and Term Sets

Site columns, content types, and term sets enable you to standardize and centralize the management of list and library metadata. In this chapter you learn how to create and manage these elements to enhance list and library management.

## Chapter 9: Workflows and Information Management Processes

This chapter presents you with the capabilities that introduce process automation into SharePoint. You learn how to create and manage workflows, use content organizers to automate the routing of content, and create information management policies to govern document development.

## Chapter 10: Records Management

When documents require structured retention, records management is used to support both internally defined and externally mandated regulatory requirements. In this chapter you learn how to configure and use the platform's records management capabilities to govern content.

## Chapter 11: Search

A search platform can be used to locate information in SharePoint and throughout the rest of your enterprise. This chapter shows you how to configure the SharePoint search features, such as query rules and result sources, and how to use these features to support enterprise searches.

## Chapter 12: Personalization and Social Features

SharePoint includes a comprehensive set of personalization and social features, which enhance personal productivity and facilitate communication and collaboration. In this chapter you learn how to configure and use personalization features (such as the profile, My Tasks, and Alerts) and social features (including newsfeeds, community sites, blogs, and wikis).

## Chapter 13: Metrics and Reporting

This chapter introduces you to the reporting capabilities available in SharePoint. The storage, audit, usage, and search reports SharePoint provides are explained in detail, and you discover how to create and share these reports.

## Chapter 14: Enterprise Office Services

SharePoint includes capabilities that extend the reach of Microsoft Office personal productivity tools to introduce team productivity functionality. In this chapter you learn about several enterprise office services available in SharePoint, including Office Web Apps, Excel Services, Form Services, and Visio Services.



# Introduction to SharePoint Technologies

SharePoint 2013 is Microsoft's business collaboration platform. It provides tools people need to effectively manage and share information, automate business processes, collaborate, and interact with others. SharePoint works with Microsoft Office technologies to enable individuals to better organize content, share work, and take information with them wherever they go.

SharePoint is designed to help in achieving the following goals:

- Provide business users with faster, more comprehensive access to actionable information. The goal is not only to provide access to more information but to make it possible to locate the most relevant information to allow people to rapidly respond to business needs.
- Enable individuals to find the most relevant people to work with, to connect with them, and to allow them to work together effectively. Teams can easily share information regardless of location, and communities of people sharing common interests can be formed.
- Improve individual and team productivity by making it easy to create and manage information and allowing this information to be made available as part of related business processes.
- Reduce the cost and time of providing enterprise-wide business solutions by providing a set of application services that work together and can be combined into business solutions.

Whether you are new to SharePoint, experienced with SharePoint 2013, or moving from a previous version to SharePoint 2013, this SharePoint 2013 User's Guide is designed to provide the information you need to be successful with SharePoint. The author provides a real-world look at how to effectively use all the capabilities the platform offers. He includes numerous examples showing how to take advantage of these capabilities and suggesting points to consider as you create and work with your SharePoint solutions.

The guide discusses the basic and advanced capabilities of both SharePoint Foundation 2013 and SharePoint Server 2013. It provides step-by-step instructions to explain how to use these capabilities to create solutions.

## What Is Microsoft SharePoint 2013

SharePoint 2013 is available as on-premise-installed software that can be tailored to your organization's needs or as a hosted, cloud-based service. Whether you host SharePoint internally or via the cloud, capabilities and features available depend on the edition and level of the product in place.

## Locally Hosted SharePoint

When SharePoint is hosted internally in your organization or through a general third party as a dedicated solution, the Microsoft SharePoint platform is available in three different editions: SharePoint Foundation 2013, SharePoint Server 2013 Standard Edition, and SharePoint Server 2013 Enterprise Edition.

SharePoint Foundation was called Windows SharePoint Services prior to SharePoint 2010. It was renamed to better represent its purpose and to align it with other Microsoft Windows Server foundation services. SharePoint Foundation offers fundamental collaboration services in the SharePoint platform, upon which all other capabilities are provided. These include:

- A web-centric information management and presentation platform
- Lists for storing and managing structured information, including contacts, links, and announcements
- Libraries for storing and managing documents
- Security services enabling granular management of environment security across sites, lists, libraries, and content and including security trimming of materials so that only individuals with access to an item will see references to it
- Authentication services providing native Active Directory integrated access management as well as the ability to extend the environment to use alternate security access providers
- Environment and information management structures that allow easy resource configuration and management
- Integrated workflow services providing the core for creation of process-centric solutions

Microsoft SharePoint Server 2013 Standard Edition extends the capabilities provided by SharePoint Foundation by adding services that extend the platform and add rich enterprise content management and workflow capabilities. These include:

- Managed web content development
- Enterprise-level document management
- Full-featured records retention and management
- Enterprise-wide search services
- People integration and social networking services
- Personalized content and alerts
- User profile management services
- Enterprise taxonomy and folksonomy management
- Web analytics
- Extended workflow configuration capabilities



Microsoft SharePoint Server 2013 Enterprise Edition extends the SharePoint platform even further by adding services that enable data integration and business intelligence services. These include:

- External system data and application integration
- Reporting and analysis services
- Data visualization and consolidation
- Calculation services
- Web-based form management and automation

The capabilities provided by the platform are used to create solutions that bring together people, information, systems, and business processes. Microsoft summarizes the wide range of capabilities provided by SharePoint 2013 within the following categories:

- *Share*: SharePoint provides enterprise collaboration and social capabilities designed to support teamwork and idea and knowledge sharing with others.
- *Organize*: Features are provided that allow you to organize all of your project materials, such as documents and tasks, as well as team communication and project status.
- *Discover*: Comprehensive search tools are available to help you find information that you need and allow you to locate people based on their background, expertise, and interests.
- *Build*: Intranet, extranet, and internet solutions that host the information and applications people need can be easily created.
- *Manage*: SharePoint provides comprehensive tools that allow delegation of management responsibilities to the owners of the processes and related information, and it provides tools to automate the management and governance of processes and information.

The capabilities of SharePoint let you create solutions to support your organization's business needs in a cost-effective, easily managed way, where the SharePoint environment becomes your central system for managing and accessing enterprise systems and information.

As the version of SharePoint your organization implements determines the features made available, the version decision is often made by weighing the organization's business needs over time. When your organization hosts SharePoint, you control and manage the environment structure and accessibility and have full flexibility to create custom solutions or introduce third-party solutions, if needed, to extend the available capabilities to meet business needs.

## Office 365, Cloud-Hosted SharePoint

For organizations that do not want to manage their own SharePoint environment but want to take advantage of what SharePoint provides, Microsoft offers SharePoint Online. SharePoint Online is part of Microsoft's Office 365 solution, which includes hosted versions of SharePoint, Exchange Server, Lync, and the Office client programs maintained and managed by Microsoft. SharePoint Online is available on a subscription model, in progressive subscription levels that allow selection of the service level that best maps to the needs of the organization.

An organization using Office 365's SharePoint Online can work with and manage its SharePoint solutions without the responsibility of managing a SharePoint infrastructure. This service, however, comes with some functionality limitations concerning the types and depth of custom solutions that can be created on the platform and the types of third-party solutions that can be leveraged.

As with locally hosted SharePoint, these capabilities are used to create solutions that bring people, information, systems, and business processes together, and SharePoint Online offers the same wide range of capabilities listed in the last section.

The capabilities of SharePoint allow you to create solutions to support your organization's business needs in a way that is cost effective, can be easily managed, and allows the SharePoint environment to become your central system for managing and accessing enterprise systems and information.

# The Evolution of SharePoint

Microsoft's SharePoint technology was first introduced in 2001, with the release of SharePoint Portal Server 2001. This product provided some basic tools designed to let users publish and find documents. It allowed creation and management of document taxonomies and represented the first step in providing a way to catalog and search for documents across an enterprise.

Microsoft next released SharePoint Team Services, which extended the document and publishing capabilities of SharePoint Portal Server 2001 by offering information collaboration. It allowed groups of individuals to work together to manage documents and lists of information, including contact lists, event lists, and link lists.

In 2003, Microsoft completely re-architected SharePoint and released Windows SharePoint Services 2.0 and SharePoint Portal Server 2003 as part of the introduction of the first Microsoft Office system. The focus of these technologies was to provide a foundation for the collection of applications, servers, and services that work together to improve user and team productivity. These products allowed organizations to introduce a variety of collaborative business solutions that were previously very difficult and costly to create and maintain.

In 2007, Microsoft released Windows SharePoint Services 3.0 and Microsoft Office SharePoint Server 2007. With the release of these technologies, Microsoft extended its Office vision to include capabilities that supported the creation of business solutions. These capabilities include content management; collaboration; business information management; workflow; intranet, extranet, and internet support; and business integration services. With this release, SharePoint became a business productivity platform with which full-featured business applications could be created and information from other applications, data sources, and systems could be aggregated.

In 2010, the SharePoint platform was enhanced to make it easier to create full-featured business solutions and allow it to be leveraged as your organization's main platform for document management, reporting, and web content management. This version also introduced new capabilities, including full-featured records management, new Microsoft Office integration services, global metadata, taxonomy management, and basic social networking services. With this release Windows SharePoint Services was renamed SharePoint Foundation. Microsoft also introduced the services architecture to permit more flexible scaling and sharing of services. The SharePoint 2010 platform provides a foundation for quickly creating productive business solutions in a cost-effective manner.

With the release of SharePoint 2013, Microsoft has again extended the SharePoint platform. To help you organize and share information and interact with others, it includes new capabilities, such as a new set of social features, content synchronization and sharing tools, application publishing and sharing, mobile integration, and layout management. SharePoint 2013 also enhances previously existing functionality in the areas of document and records management, business intelligence, search, web content management, and workflow.

## Exploring What's New in SharePoint 2013

SharePoint 2013 has several new capabilities and updates previously existing SharePoint capabilities. Among the most noteworthy new and enhanced capabilities are the following:

- *User Interface Enhancements*
  - Drag and drop documents into libraries
  - Introduction of Design Manager, which provides a step-by-step approach for creating designs, master pages, and layouts
  - The ability to create designs for the SharePoint environment using Dreamweaver and other standard design tools
  - Cross-platform support through the use of HTML5

- *Web Content Management Enhancements*
  - iFrame dynamic content embedding
  - Better video support, including thumbnail previews
  - Dynamic content, such as JavaScript and JQuery, insertion support
  - Image renditions for displaying different-sized versions of an image on different pages
  - Language translation services, supporting both human and machine translations
  - Cross-site content publishing, allowing content managed in one location to be made visible in multiple site collections
  - Designating lists and libraries as catalogs for reuse of content across publishing site collections
  - Navigation definitions through term sets
  - Category pages for aggregating content meeting-defined criteria or parameters
- *Records Management Additions*
  - In-place holds that preserve content at the time of the hold but allow users to continue working with the content
  - eDiscovery center to facilitate the management of discovery cases
  - Site-based retention, allowing retention policies to be created in a site and applied to all items in the site
- *Search Architecture*
  - Federated searching across SharePoint and Internet search engines
  - Native PDF indexing
  - Document previews, allowing review of the document content within the search results page
  - Search results groupings combining related results
  - Personalized results ranking
  - Result type styles that can be defined by type of content returned
  - Query rules management where conditions and correlation actions can be specified
  - Visual refiners with counts
- *SharePoint 2013 Workflow Platform*
  - New workflow platform providing a rich set of workflow features to SharePoint
  - No-code declarative authoring environment, using XAML files to define workflows and manage their execution
  - A set of new workflow actions and features, including declarative authoring, rest, and service bus messaging

- *New Social Computing Features*
  - The ability to follow content and people
  - Community sites designed to manage information exchange between people
  - Activity feeds showing information about people, documents, sites, and tags being followed
  - The ability to connect to people based on experience and skills
  - Like functionality
  - Reputation builder, allowing the collection of reputation points toward badges that can be earned
  - Aggregated task management views
- *Business Intelligence Enhancements*
  - Power View, enabling the creation of interactive visual representations of data
  - In-memory BI engine, allowing quick analysis of millions of rows of data
  - Excel services enhancements in data exploration, calculated members, and timeline controls
  - PerformancePoint service enhancements in filtering, filter search, and iPad support
  - The ability to comment on Visio diagrams within Visio Services
- *Mobile Access Enhancements*
  - HTML5 rendering to support Windows Phone 7 & 8, iPhone iOS5, and Android 4.0 and later
  - Device-specific targeting through channels defined to render a site in multiple ways to target specific browsers
  - Geolocation field-type support
- *New App Architecture*
  - Functionality added to sites in a safe way that isolates the application's functionality
  - SharePoint App Store, allowing on-premise and hosted SharePoint environments to download apps

In the chapters that follow, we discuss the new and updated capabilities of SharePoint 2013 and describe how they can be used to create business solutions.

## Understanding the Value of SharePoint 2013

SharePoint 2013 provides an information management and sharing platform, a document and record management platform, a workflow platform, a business process management framework, a social platform, and a development platform on which Information Worker solutions can be created. The building blocks needed to create comprehensive business solutions are available and can be easily assembled into scalable enterprise solutions.

In today's work environment, information management and business processes often rely on individuals' knowledge of available information and manual business processes to address many needs. As organizations grow dependent on specific individuals to complete activities, it becomes very difficult to allow others to participate in them.

In these situations finding information is also a challenge. Individuals spend a large amount of time locating needed materials and information, frequently perform duplicative work, and re-create information when it cannot be located. Building custom solutions to attempt to automate these processes and the information management environment can be a costly and difficult exercise.

SharePoint 2013 can provide organizations with a solid foundation of information management, collaboration, workflow, social, and data integration capabilities that combine to create solutions simplifying automation of business processes and information management environments. With it, solutions are created more rapidly and provide broader business value.

## SharePoint Building Blocks

SharePoint 2013 includes many capabilities that can be combined to create enterprise business solutions. The core capabilities that these solutions are built on include the following:

- Sites provide a structure for securing, storing, and organizing information and solutions.
- Lists are containers for storing structured information,
- Libraries are containers for storing and managing documents.
- Workflows automate business processes.
- Records management extends document management capabilities to manage documents through their full life cycle.
- Alerts can notify users when information is added, changed, or removed.
- Web Parts allow existing information to be organized and presented and provide additional business logic and functionality to be incorporated into the environment.
- Search provides the ability to locate information.
- Personalization and social capabilities allow users to create and manage their own information, communicate with others, and find others based on their skill and experience.
- Data integration capabilities allow information outside SharePoint to be incorporated into SharePoint solutions,

In this book we explore these tools in detail and describe how they are configured and used. We discuss the components that make up a SharePoint 2013 environment and provide the information you need to effectively use these components to build business solutions.



# Understanding Sites

Sites are the main constructs in SharePoint for organizing and storing all content and resources. They provide locations for people to work together and interact with content and processes. Sites can contain lists, libraries, pages, workflow, web parts and apps.

Those familiar with previous versions of SharePoint are already aware of lists and libraries, which are used to store information within SharePoint. In SharePoint 2013 lists and libraries are part of the new SharePoint app architecture. They still perform the same functions but are now classified as apps. An app is a distinct piece of functionality that is used to provide capabilities within a SharePoint site. By default the only apps initially available within SharePoint Foundation and SharePoint Server are the default list and library templates. The default lists and libraries will be discussed in detail in Chapter 5.

- *Lists*: SharePoint includes a variety of standard lists and the ability to create custom lists. Lists are available to facilitate communications and track information. Several of the available standard list types also have extended capabilities that help them support their primary functions. For example, contact lists have Outlook integration features that allow the contained contact details to be made available within the Outlook Contacts area. The standard lists can be tailored and custom lists created to meet specific information management needs. Lists are discussed in detail in Chapters 5 and 6.
- *Libraries*: Libraries are used to manage all media to be stored in SharePoint, including documents, forms, web pages, images, and videos. Different types of libraries are available to store and manage the different types of media. Libraries are discussed in detail in Chapters 5 and 7.

Along with list and library apps used to store information, workflows and web parts are core features used to introduce and manage business solutions within SharePoint. Additional capabilities can also be introduced through apps.

- *Workflows*: Workflows are used to incorporate information and people into business processes. SharePoint provides a variety of standard workflows based on the version of SharePoint you are using. Customized workflows can also be created using tools such as SharePoint Designer and Visual Studio. Workflows are discussed in more detail in Chapter 9.
- *Web Parts*: A web part is an application component available within a page in a SharePoint site. Web parts are used to display information and introduce application functionality. They are discussed in more detail in Chapter 4.
- *Apps*: An app is a solution made available within SharePoint pages through an app part. Like web parts, apps introduce business functionality into the SharePoint sites. Apps, however, leverage a different architecture, allowing them to be hosted from environments other than the SharePoint farm. Apps are made available through the online SharePoint app store or through locally managed corporate app repositories. Apps are discussed in detail in Chapter 4.

In this chapter we will familiarize you with the general layout and structure of SharePoint sites. We will discuss the default site templates available across SharePoint Foundation and SharePoint Server, including their layouts and functions, and identify the different site templates.

## Understanding Site Collections and Sites

Before we talk about sites, you need to understand how sites are organized. As we mentioned earlier, sites are the fundamental storage and organization tool within SharePoint used to host and manage all SharePoint materials and functionality. Sites themselves are grouped and organized within site collections. Site collections are created by SharePoint IT administrators as the main containers for storing and managing related sites. A site collection defines the storage location (database) where sites and site resources are stored and maintained. A site collection also defines the overall features to be made available within the contained sites, determines overall security configurations, determines overall navigation hierarchies, and defines general policies for content and resource management. As part of creating a new site collection, your IT administrator defines the database in which the resources will be stored and managed and can identify storage limits to restrict the volume of content stored in the collection. The IT administrator will also identify site collection administrators. Site collection administrators are individuals that have complete administrative control over the site collection and all contained sites.

The overall capabilities available within a site collection are determined by the site collection features active within it. Site collection administrators determine the features to be made available within their sites. There is a default set of active features available within a created site collection that is based on the template selected when the collection was created. A set of default site collection features is available as part of SharePoint Foundation, and additional features are available when SharePoint Server is in place. The default site collection features available in both SharePoint Foundation and SharePoint Server include the following:

- *Custom Site Collection Help*: This feature, when active, creates a library used to store custom help materials for use within the site collection.
- *Open Documents in Client Applications by Default*: When this feature is active, documents that have both client applications and web applications available to open them will default to opening in the client application. Documents of this type include Microsoft Office files. For example, a Word document will open in Microsoft Word—assuming Word is installed on the computer. When this feature is active, Office documents will open in the Office client by default. When this feature is deactivated, a Word document will open in Office Web Applications within the web browser—assuming Office Web Applications have been installed in the environment.
- *Search Server Web Parts and Templates*: Activating this feature will add the Search Server Web Parts and Display templates to the sites within the site collection. These web parts and templates allow search functionality to be added to sites within the collection.
- *Three-State Workflow*: This feature, when activated, will make the three-state workflow available within the site, allowing workflows to be created against lists and libraries that can promote documents through three status levels. You could, for example, create a workflow that promotes a document status from Draft to In Progress to Final.

When SharePoint Server is in place, there are several additional features beyond those just described that are available within the site collection. These additional features provide a variety of business solution capabilities and include the following:

- *Content Deployment Source Feature*: This feature provides functionality that will allow the site collection to be a source for content deployment. Content deployment features allow content in a source site collection to be made available within other site collections in the environment.

- *Content Type Syndication Hub*: Activating this feature introduces capabilities allowing the site collection to be a source, or hub, for globally managed metadata and for content types that can be used in other site collections in your environment.
- *Cross-Farm Site Permissions*: This feature allows applications deployed within the site collection to be made accessible to other locations within the farm.
- *Cross-Site Collection Publishing*: Activating this feature allows lists and libraries within the collection to be designated as catalogs for cross-site collection content publishing. Defining catalogs allows catalog content to be used within other site collections in the environment.
- *Disposition Approval Workflow*: This feature makes the disposition workflow available for use within the site. This workflow helps facilitate the expiring of content in the environment.
- *Document ID Service*: When this feature is active, all documents within the site collection are assigned IDs that can be used to identify and locate documents regardless of where they are moved within the environment.
- *Document Sets*: Enabling this feature makes the document sets content type available for use within the site collection. This content type allows document sets to be created and managed, which are used to group documents within special folders where they can share metadata, be passed through workflows, and managed as if they were a single item. Document sets are discussed in more detail in Chapter 7.
- *In Place Records Management*: When active, this feature allows documents to be declared as records in their source libraries within the collection. Declaring a document a record prevents it from being changed. Records management is discussed in detail in Chapter 10.
- *Library and Folder Based Retention*: This feature gives administrators the ability to override any retention schedules set against content types within lists and libraries. This in turn allows documents or list items that leverage these content types to be governed by policies against the list or library they are located within instead of against the item's content type.
- *Limited-Access User Permission Lockdown Mode*: When this feature is enabled, users assigned to the Limited Access permission level will not have the ability to access pages within the environment. Users are assigned to the Limited Access permission level automatically within the environment when the account has access only to resources contained within the site, not directly to the site itself. They must be given rights within the site that allows them to access the resources to which they have been granted rights.
- *PerformancePoint Services Site Collection Features*: Enabling this feature makes the PerformancePoint Services available to the site collection and allows for the creation of dashboards and scorecards for analytical data.
- *Publishing Approval Workflow*: This feature, which makes the web content publishing approval workflow available within the collection, allow approval processes to be defined for publishing pages within the environment.
- *Reporting*: When enabled, this feature creates site collection management reports.
- *Reports and Data Search Support*: This feature, when active, allows the enterprise search centers to support report searching. The feature includes a set of content types, site columns, and library templates that can be used to define materials to be made available within report searches.
- *Search Engine Sitemap*: Enabling this feature generates a site map on a recurring basis; when generated, it is used by the search engine to optimize search results. This feature, used only when the environment is configured to allow anonymous access, provides a consistent site map for all anonymous users.



- *SharePoint 2007 Workflows*: This feature makes the standard workflows that were part of SharePoint 2007 available within the current SharePoint 2013 environment site collection.
- *SharePoint Server Enterprise Site Collection Features*: Enabling this feature makes the SharePoint Server Enterprise edition features available for use within the site collection. This includes features such as Form Services, Visio Services, Access Services, and Excel Services.
- *SharePoint Server Publishing Infrastructure*: This feature creates a set of central libraries, content types, and page layouts needed to support the SharePoint site publishing features. These features enable the ability to create publishing pages within sites in the environment and the management of master pages. Publishing pages are discussed in more detail in Chapter 4.
- *SharePoint Server Standard Site Collection Features*: Enabling these features makes the capabilities that are part of SharePoint Server Standard edition available within the site collection. Included are such capabilities as my site, user profiles, and SharePoint enterprise search.
- *Site Policy*: When enabled, this feature allows information retention schedules to be created for standard site resources.
- *Video and Rich Media*: Enabling this feature makes a set of library templates, content types, and web parts available for storing and viewing rich media, including images and videos.
- *Workflows*: This feature makes the set of SharePoint 2013 out-of-the-box workflows available within the SharePoint lists and libraries. Workflow is discussed in detail in Chapter 9

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■ **Note** Some of the site collection features described here are available only in SharePoint Server Enterprise edition, not in SharePoint Server Standard edition.

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Sites organize and house the information, workflows, services, and applications that make up the core of the SharePoint environment. These core elements are used to create business solutions within the environment. There are different types of sites available in SharePoint, each having different combinations of features enabled to support the purposes of the specific site type.

Not all SharePoint site templates are available in all versions of SharePoint. SharePoint Foundation includes a subset of the sites available in SharePoint Server. There are four categories of site templates available in SharePoint 2013. Each category includes multiple templates that can be used to create sites to address different needs. The following are the categories of site templates available by default in SharePoint 2013.

- *Collaboration*: The collaboration site templates are used to create sites supporting different ways for people to work together.
- *Enterprise*: Enterprise site templates are used to create sites for managing enterprise content or data sharing and management needs.
- *Publishing*: Publishing site templates create sites designed to support web content management needs. This category is available only when SharePoint Server is being used, not SharePoint Foundation.
- *Custom*: The custom category is displayed when custom site templates are created within SharePoint. This category includes all templates created by site administrators. Creating site templates is discussed in Chapter 3.

A template is a saved site structure and configuration designed to meet a specific need. When a site is created from a template, the newly created site will contain all of the resources saved in the template; it thus becomes a copy that can then be used and modified as needed. SharePoint also allows saving an existing site as a new site template and so provides the ability to extend the list of available site templates as needed.

The site templates available within the discussed categories are dependent on the version of SharePoint 2013 in use. SharePoint Foundation contains a subset of templates available within SharePoint Server. The following are the standard site templates available within SharePoint Foundation and SharePoint Server.

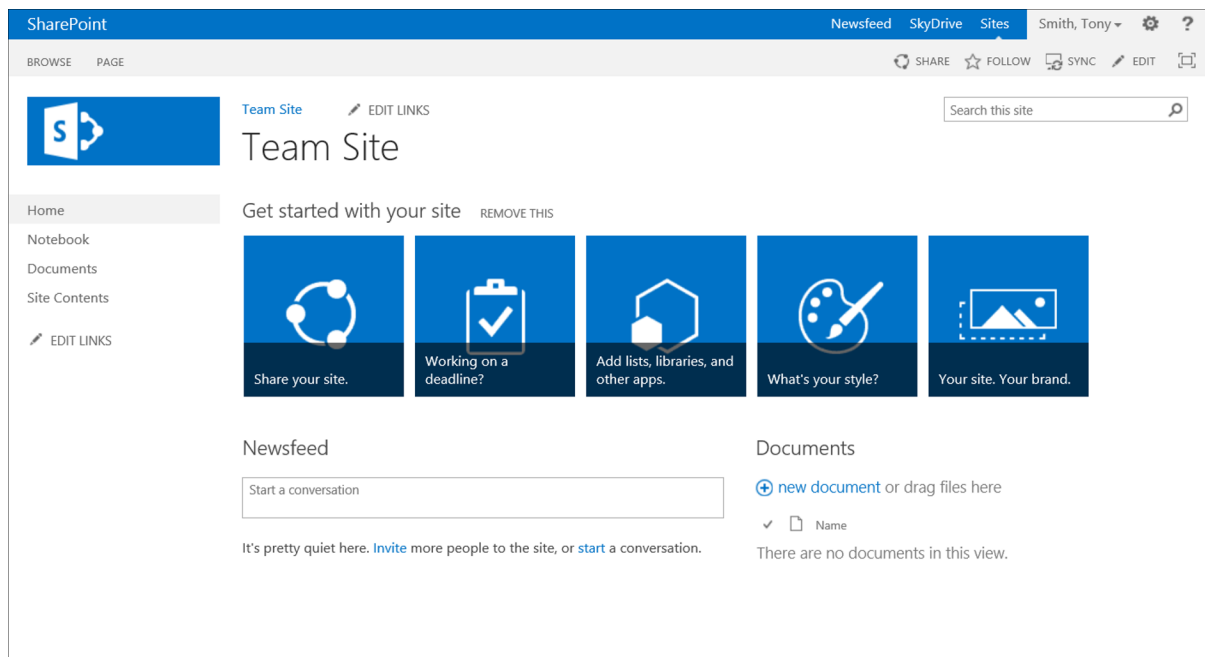
- ***Collaboration Templates***
  - *Team Site*: This site template provides the most common set of resources needed for sites being used to facilitate general team collaboration and information sharing. This site template is available in both SharePoint Foundation and SharePoint Server. However, the capabilities available within the created sites differ slightly between SharePoint Foundation and SharePoint Server. The various features and structures are reviewed later in this chapter.
  - *Blog*: The blog template creates a site to manage information postings and comments, enabling social interactions on important topics. This template is available in both SharePoint Foundation and SharePoint Server.
  - *Project Site*: This template is used to create sites to manage projects and initiatives and includes resources to manage project content, status, and communications. It is available only in SharePoint Server.
  - *Community Site*: The community site template is used to create sites where groups of people come together to discuss, track, and manage important topics and common interests. It too is available only in SharePoint Server.
- ***Enterprise Templates***
  - *Basic Search Center*: This site template is used to create a site containing pages where searches can be executed to find relevant content. This template is available in both SharePoint Foundation and SharePoint Server.
  - *Document Center*: The document center site template is used to develop sites for creating and managing enterprise documents. This template is available only in SharePoint Server.
  - *Records Center*: This site template is used to create sites to manage corporate records. The template allows for the upload and automated routing of documents and the creation and management of retention policies for these materials. It is available only in SharePoint Server.
  - *Business Intelligence Center*: This site template is used to create sites for viewing and analyzing business intelligence data, including KPIs, reports, and analytics. It too is available only in SharePoint Server.
  - *Enterprise Search Center*: This site template is used to create a site containing pages where searches for content, people, conversations, and videos can be executed. It is available only in SharePoint Server.
  - *Visio Process Repository*: This template is used to create sites that store and manage Visio process diagrams and related tasks, discussions, and communications. It is available only in SharePoint Server.

- **Publishing Templates**
  - *Publishing Site*: The publishing site template is used to create sites for managing and presenting web content. This template is available only in SharePoint Server.
  - *Publishing Site with Workflow*: This template includes the same layout and structure as the publishing site but also has features enabled to support the approval of content as part of the publishing process. It is available only in SharePoint Server.
  - *Enterprise Wiki*: The enterprise wiki site template is used to create sites for capturing, managing, and storing knowledge. It is available only in SharePoint Server.

Structures and features of all of these site types are reviewed later in this chapter.

## Site Structures and Layouts

All SharePoint sites have the same basic overall layout and structure and contain specific elements needed to navigate through the environment and manage site resources. The actual organization and layout of a SharePoint site's interface is configurable by environment managers. In this section the structural components and standard elements contained within a SharePoint site and their locations in the standard SharePoint site layout are described.

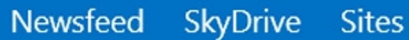


**Figure 2-1.** Team site home page

In this section each of the components making up the SharePoint 2013 environment are discussed.

### My Site Menu

The My Site menu is located to the right in the banner area. These options are available only when SharePoint Server is in place.



**Figure 2-2.** My Site menu

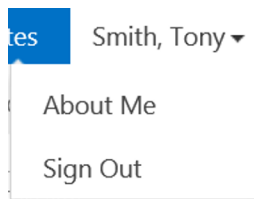
The My Site menu options are listed in the banner and include the following elements:

- *Newsfeed*: The Newsfeed option, when clicked, will navigate to the My Site Newsfeed page.
- *Skydrive*: The Skydrive option navigates to the Documents library of the user's My Site.
- *Sites*: The Sites option navigates to the Sites page of the My Site showing sites the user is currently following and sites suggested for following.

The My Site capabilities of SharePoint 2013 are discussed in detail in Chapter 12.

## User Menu

The User menu is located in the right-hand banner area in the default layout of the SharePoint 2013 environment. This menu is available in all versions of SharePoint 2013, with options depending on the version of SharePoint being used. The User menu provides access to the user details, as well as the ability to sign out of SharePoint, as seen in Figure 2-3.



**Figure 2-3.** User menu

The User menu options are accessed by clicking the user name. When SharePoint Foundation is being used, the User menu includes the following options:

- *My Settings*: My Settings allows you to navigate to the User Information page. This page permits you to view and manage your user profile details. The following information can be managed within the User Information page:
  - *Personal Settings*: These are details about the user, including name, e-mail address, mobile number, “about me” details, profile picture, department, job title, and SIP address. The information can be edited and saved.
  - *Language and Region*: The language and region option allows you to set your display language preferences for, if the user settings should be defined based on the server's settings, time zone and format, calendar format, and workweek.
  - *My Alerts*: The My Alerts on This Site allow you to manage the alerts you have configured within the SharePoint environment.
- *Sign Out*: The Sign Out option, when clicked, logs you out of SharePoint and prompts you to close the web browser window.

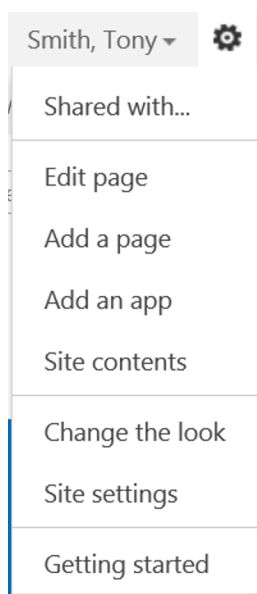
When SharePoint Server is in place, the User menu includes the following options:

- *About Me*: About Me navigates you to the My Site About Me page. This page allows you to manage your profile details and view your activities.
- *Sign Out*: The Sign Out option, when clicked, logs you out of SharePoint and prompts you to close the web browser window. This option is the same one used in SharePoint Foundation.

User settings, My Site, and profile information are discussed in more detail in Chapter 12.

## Settings Menu

The Settings menu is located in the right-hand banner area next to the User menu. This menu includes site management options available to logged-on users based on their rights within the site. This menu, accessed by clicking on the Settings icon, includes a dynamic set of options based on a user's rights and available features within the site. The available options are discussed throughout this book in the context of how they are used while managing the various aspects of SharePoint.



**Figure 2-4.** Settings menu

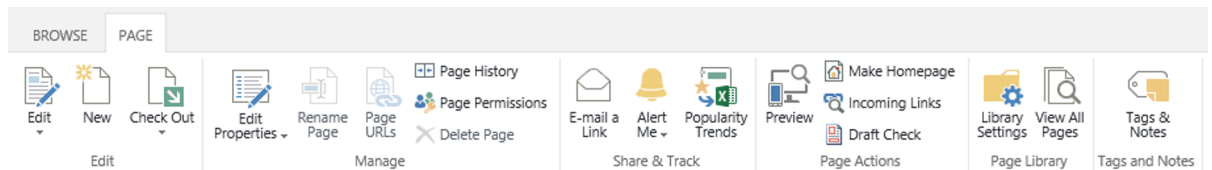
Here are some of the more common options available through the Settings menu.

- *Shared With*: The Shared With option lists users with access to the current site or page. The Shared With window lists the users and provides the following options:
  - *Invite People*: This option allows you to identify users that should be granted Edit access to the resource.
  - *Email Everyone*: This option provides the ability to e-mail all users having access to the site.
  - *Advanced*: The Advanced option navigates to the site's permissions page.

- *Edit Page*: The Edit Page option is used to place the page in Edit mode. Page management is discussed in more detail in Chapter 4.
- *Add a Page*: Selecting this option opens the Add a Page window, which allows for the creation of a new SharePoint page.
- *Add an App*: This option is used to navigate to a page containing the apps that can be added to create new lists, libraries, and any other available app. Apps are discussed in more detail in Chapter 4.
- *Site Contents*: This option navigates you to the Site Contents page, where all of the lists, libraries, and other apps currently available within the site are listed.
- *Design Manager*: When SharePoint Server is in place, the Design Manager option is listed in the Settings menu. Selecting this option navigates you to the Design Manager Welcome page.
- *Change the Look*: When SharePoint Foundation is in place, the Change the Look option is listed in the Settings menu. Selecting this option navigates you to the Change the Look page.
- *Site Settings*: This option navigates you to the SharePoint Site Settings page.
- *Getting Started*: This option navigates you to the Getting Started page within the site.

## Ribbon

The ribbon includes the contextual page management options available to you. Initially the ribbon displays the ribbon tabs, with the related options presented once a tab is selected. Figure 2-5 shows the page tab listing the options available for managing the currently displayed page.



**Figure 2-5.** Ribbon

Clicking on a ribbon tab shows the ribbon options for the selected tab. By default, these options overlay the navigation and title area. To remove the ribbon options from the display in order to see the navigation bar and title area, the Browse option can be selected. This option is always available as a ribbon tab.

## Social Tools

The social tools are located to the right of the ribbon tabs. These options list the social capabilities available for the current page. Most of the social tools are available only in SharePoint Server and include the items listed in Figure 2-6.



**Figure 2-6.** Social tools

Availability of options in the social tools section is dependent on the version of SharePoint installed and includes the following:

- *Share*: The Share option is available in both SharePoint Foundation and SharePoint server. When Share is selected, the Share window is presented. This window allows identification of users to be granted edit rights to the site.
- *Follow*: Clicking on the Follow option adds the currently displayed item to your Follow list. Any changes to the item being followed are noted in your activity stream. This option is available only within SharePoint Server.
- *Sync*: The Sync option allows you to create a synchronized copy of the item currently being displayed on the local computer. Selecting this option will initiate the SharePoint Workspace synchronization process if Office 2010 is installed. With Office 2013 installed, the Sync window is presented and the information is synchronized directly to the local computer.

The social capabilities of SharePoint are discussed in detail in Chapter 12.

## Page Management Tools

The page management tools allow management of the current page. Available next to the social tools, the listed options are dependent on the page being displayed.



**Figure 2-7.** Page management tools

The following options are available in the page management area.

- *Edit*: The Edit option is available within the SharePoint web part, wiki, and publishing pages. When clicked, the displayed page will enter Edit mode, where page content can be managed.
- *Focus on Content*: This option hides the title, navigation, and Quick Launch areas of the site; the content then fills the space these areas were using. This option allows the space for viewing site content to be maximized.

## Navigation Bar

The navigation bar, which lists navigation options available to users within the site, allows users access to the resources hosted through the environment. Figure 2-8 shows the layout of the standard navigation bar.



**Figure 2-8.** Navigation bar

The navigation bar includes only those options that a user's security rights within the environment make available. How the navigation bar is managed depends on the version of SharePoint in use. When SharePoint Foundation is in use, the navigation bar can be configured either to allow options to be managed directly within the site or to inherit the navigation options of the parent site. When SharePoint Server is in place, navigation options can also be based on a term set. Within the term store a term set can be created that includes a set of options representing the desired navigation for the site. Referencing this term set causes the navigation bar option to be based on the information within the term set instead of on the site structure.

How to configure the navigation management approach and options is discussed in Chapter 3.

## Search Bar

The Search bar allows you to enter text to perform a search. The search will initially be scoped against the current site. Performing a search navigates you to the search results page, where the items satisfying the search criteria are presented. When SharePoint Server is in place, a search center can be defined, allowing you to change the result source of the search by selecting a different option from the Result Source drop-down, as seen in Figure 2-9. SharePoint Search is discussed in detail in Chapter 11.



**Figure 2-9.** Search bar

## Quick Launch Navigation

Located in the left-hand section of the site, the Quick Launch navigation area provides easy access to elements that are available within the site. The Quick Launch navigation options can be managed to include links to lists, libraries, subsites, and custom URLs. Any list or library in the site configured to be displayed in Quick Launch when added or edited within SharePoint is added to the Quick Launch navigation area for easy access. By default, the Quick Launch navigation includes links to the current site's home page and Site Contents page. Sites created from the various site templates include references to key site resources in the Quick Launch by default as well. Working with and managing SharePoint navigation, including Quick Launch, is discussed in Chapter 3.

## Content Area

Located to the right of the Quick Launch navigation, the content area is the main body of the site page. This is the section that contains the elements that you want to make available through the site. This section may include documents, lists, web parts, apps, web content, and similar elements. The site's content area is divided into zones where content elements can be placed. The layout of this area and the configuration of the zones are dependent upon the page template in use. When a site is initially created, the home page will leverage the page template identified when the template was created. A user with appropriate rights can later change this layout. Two different types of zones are available on pages in SharePoint. The types available on a given page are dependent on the type of page being used. Standard SharePoint pages and SharePoint publishing pages contain web part zones where web parts can be placed and organized. Another type of page available in SharePoint is a wiki page. Wiki pages contain wiki zones. Wiki zones can contain web content, web parts, videos, and other types of content. Pages are discussed in detail in Chapter 4.

## Standard Site Templates

Earlier in this chapter we listed the site templates available within SharePoint 2013. These templates are provided to create sites to meet a variety of needs. Selecting the best site template when creating sites is done by understanding the resources available and features enabled by default within a created site in order to determine how closely those resources map to your needs. In this section we will detail the layouts and configurations of each of the default templates available within SharePoint Foundation and SharePoint Server.

## Collaboration

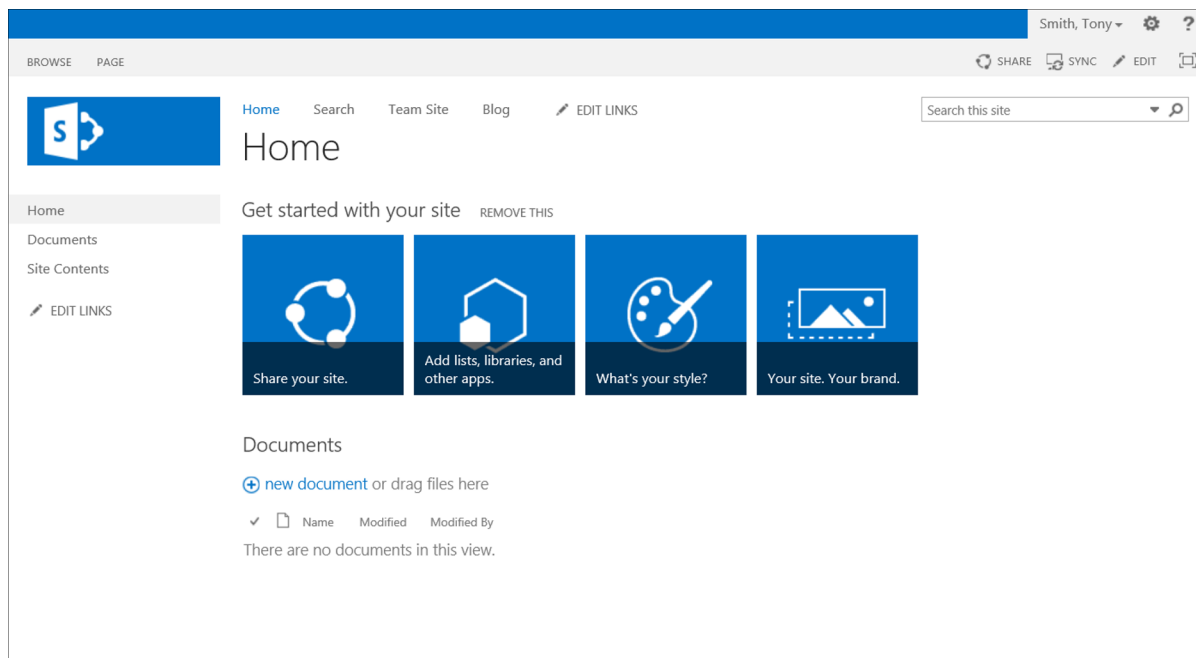
Collaboration site templates are those created to support collaboration efforts performed within SharePoint.



## Team Site Template

The Team Site template is available in both SharePoint Foundation and SharePoint Server. This template is used to create sites that facilitate general team collaboration and information sharing. A team site contains resources needed to allow a team to bring together the resources needed to manage a variety of collaborative work efforts, including projects and other team initiatives. A team site has the Wiki Page Home Page feature enabled, which results in wiki pages being available within the site and having a wiki page being defined as the site's home page. Using a wiki page as the site's home page provides flexibility when configuring the layout and the resources available on the page, allowing a mix of web parts, web content, images, videos, and more.

The resources available in a team site and the home page layout vary slightly between SharePoint Foundation and SharePoint Server environments. When SharePoint Server is used, the SharePoint social capabilities are active within the team site by default. This includes the Newsfeed capabilities. Figure 2-1 shows the default team site home page layout for SharePoint Server environments. Since SharePoint Foundation does not include SharePoint social features, the Newsfeed functionality is not available for use and will not be included in the Team Site, as seen in Figure 2-10.



**Figure 2-10.** Team Site option on SharePoint Foundation

While the SharePoint Server and the SharePoint Foundation team sites both use a wiki page as the home page for the site, the layouts of the pages are different. In SharePoint Foundation the Team Site home page is configured with a single zone containing all of the presented resources. In SharePoint Server the Team Site home page is configured to include a three-zone layout. Wiki page layouts can be changed for existing pages, allowing you to update these initial layouts to meet your specific needs. Editing pages is discussed in Chapter 4.

A site created from the Team Site template includes components listed in Table 2-1.

**Table 2-1.** Team Site Template Components

Item	Type	In Quick Launch	In Content Area
<i>Libraries and Lists</i>			
Documents	Document library	Yes	Yes
MicroFeed (SharePoint Server only)	MicroFeed list	No	No
Site Assets	Document library	No	No
Site Pages	Wiki page library	No	No
<i>Web Parts</i>			
Get started with your site	Get started with your site web part	N/A	Yes
Site Feed (SharePoint Server only)	Site feed web part	N/A	Yes

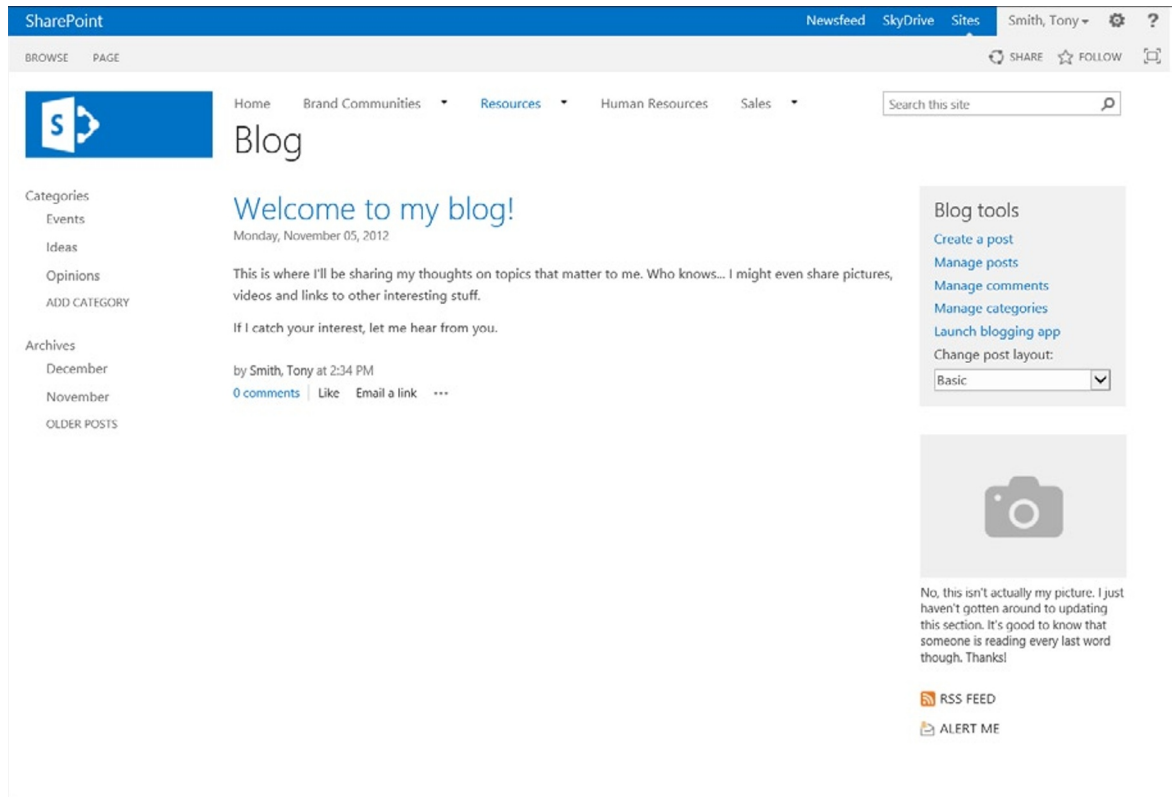
The SharePoint services active within the team site by default also vary depending on whether SharePoint Foundation or SharePoint Server is used. The features active within a newly created site based on the Team Site template include the following:

- Access App (SharePoint Server only)
- Following Content (SharePoint Server only)
- Getting Started
- Minimal Download Strategy
- Mobile Browser View
- SharePoint Server Enterprise Site features (SharePoint Server only)
- SharePoint Server Standard Site features (SharePoint Server only)
- Site Feed (SharePoint Server only)
- Site Notebook (SharePoint Server only)
- Team Collaboration Lists
- Wiki Page Home Page
- Workflow Task Content Type (SharePoint Server only)

Available site features and their uses were discussed earlier in this chapter.

## Blog Template

Like the Team Site template, the Blog template is available in both SharePoint Foundation and SharePoint Server. This template, which provides the structure necessary for managing blog resources, gives the ability to create and manage posts and comments and organize these communications into categories. Sites created from this template use a specialized web part page layout that includes a three-zone configuration, with one zone located in the Quick Launch area of the site. The site created from the Blog template is depicted in Figure 2-11.



**Figure 2-11.** Blog site

A site created from the Blog template includes the components listed in Table 2-2.

**Table 2-2.** Blog Template Components

Item	Type	In Quick Launch*	In Content Area
<i>Libraries and Lists</i>			
Categories	Categories list	Yes	No
Comments	Comments list	No	No
Photos	Picture library	No	No
Posts	Posts list	No	Yes
<i>Web Parts</i>			
Archives	Archives web part	Yes	No
Blog Tools	Blog Tools web part	N/A	Yes
About This Blog	Content Editor web part	N/A	Yes
Blog Notifications	Blog Notifications web part	N/A	Yes

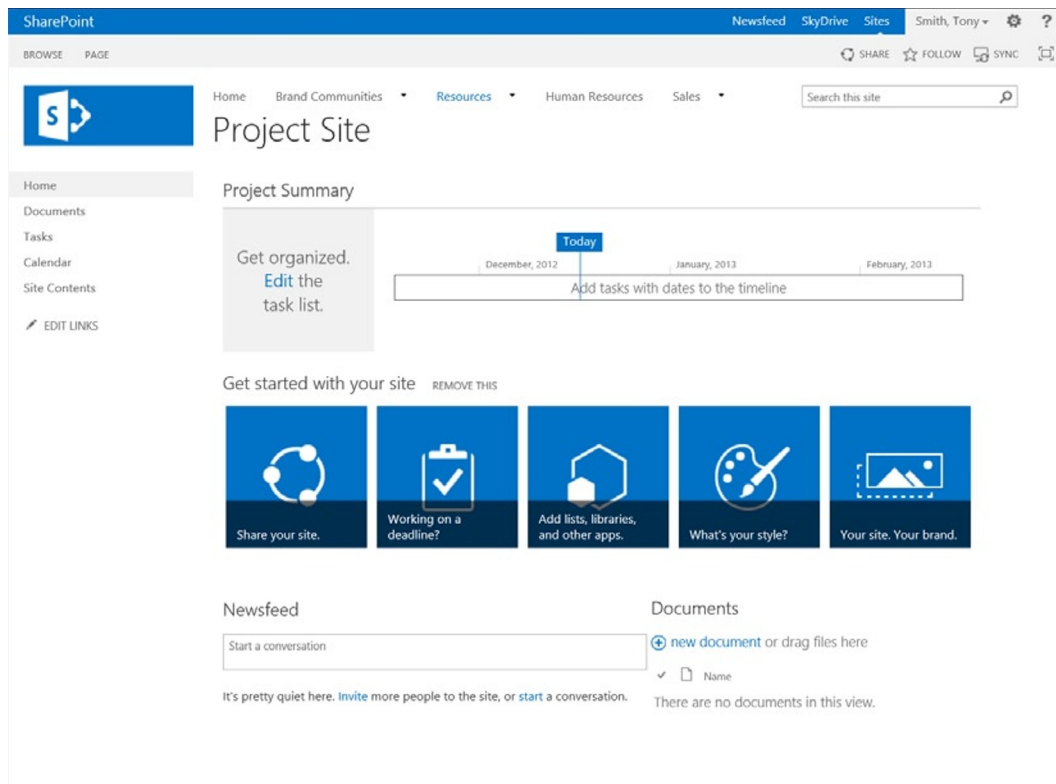
\* The Quick Launch area in a Blog site includes a web part zone called Blog Navigator, where the items listed in the Quick Launch area are placed.

Blog sites allow you to track topics to discuss; they are often used as team communications tools to let people publish news, comment on posts, and respond to questions. Sites created from the Blog template include the following active site features:

- Access App (SharePoint Server only)
- Following Content (SharePoint Server only)
- Minimal Download Strategy
- Mobile Browser View
- SharePoint Server Enterprise Site features (SharePoint Server only)
- SharePoint Server Standard Site features (SharePoint Server only)
- Team Collaboration Lists
- Workflow Task Content Type (SharePoint Server only)

## Project Site Template

The first of the collaboration site templates available in SharePoint Server but not SharePoint Foundation is the Project Site template. Sites created from this template are designed to support project management, including the management of tasks and resources for any type of project or initiative. A project site has a structure similar to a team site's, with added resources to track and manage project tasks. These sites use a web part page as the home page, including web parts to depict the project tasks, documents, and feed information. Figure 2-12 depicts the default layout of a project site.



**Figure 2-12.** Project Site

A site created from the Project Site template includes components listed in Table 2-3.

**Table 2-3.** *Project Site Template Components*

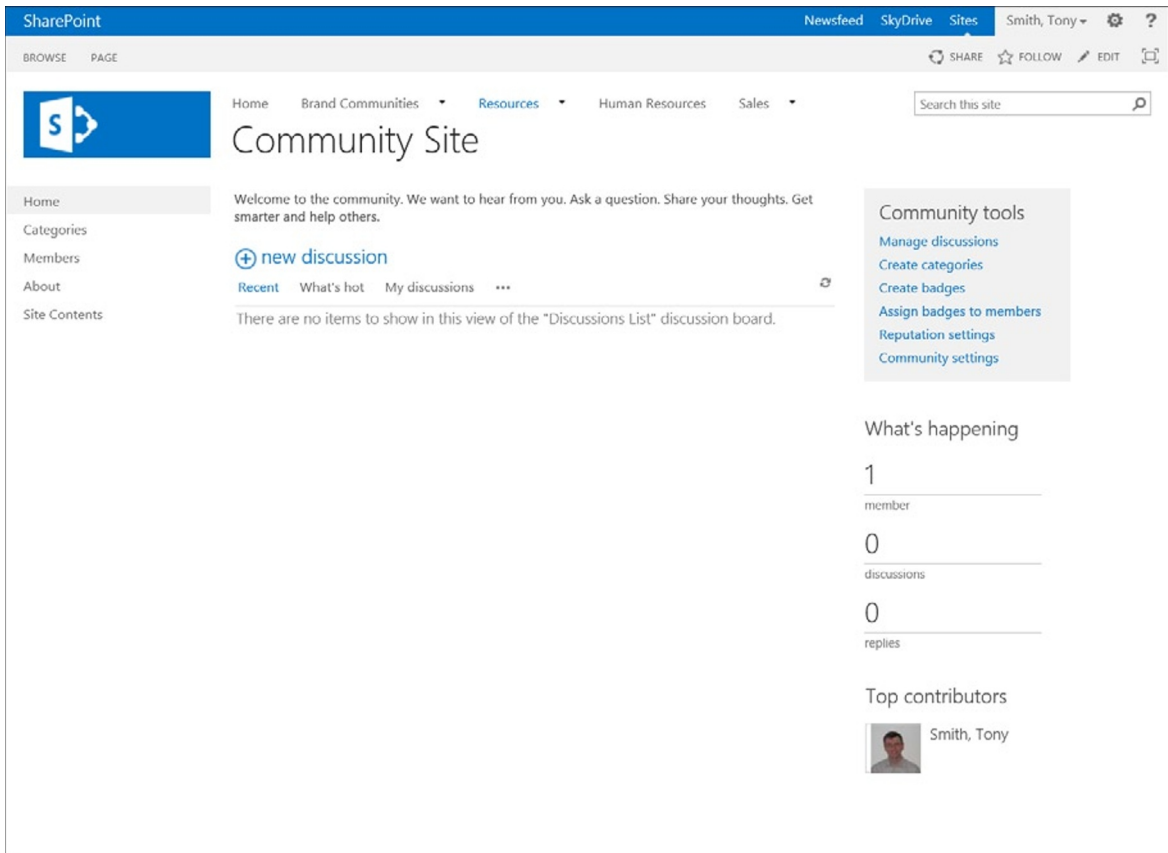
Item	Type	In Quick Launch*	In Content Area
<i>Libraries and Lists</i>			
Calendar	Calendar list	Yes	No
Documents	Document library	Yes	Yes
MicroFeed	MicroFeed list	No	No
Site Assets	Document library	No	No
Tasks	Tasks list	Yes	No
<i>Web Parts</i>			
Project Summary	Project summary	N/A	Yes
Get started with your site	Get started with your site web part	N/A	Yes
Site feed	Site Feed web part	N/A	Yes

Sites created from the Project Site template have the following features active by default:

- Access App
- Following Content
- Getting Started
- Minimal Download Strategy
- Mobile Browser View
- Project Functionality
- SharePoint Server Enterprise Site features
- SharePoint Server Standard Site features
- Site Feed
- Team Collaboration Lists
- Workflow Task Content Type

## Community Site Template

A second collaboration template available in SharePoint Server but not SharePoint Foundation is the Community Site template. This template is used to create sites where groups of people can discuss related topics. Community templates bring together the social features of SharePoint 2013 and allow people to join a community, participate in discussions, share experiences, and find others with similar interests, skills, and experiences. The Community Site uses a wiki page as the site's home page, with zones organized by default into a two-column layout, as seen in Figure 2-13.



**Figure 2-13.** Community Site home page

A site created from the Community Site template includes components listed in Table 2-4.

**Table 2-4.** Community Site Template Components

Item	Type	In Quick Launch*	In Content Area
<i>Libraries and Lists</i>			
Categories	Categories list	Yes	No
Community Members	Community Members list	Yes	Yes
Discussion List	Discussion board	No	No
Site Assets	Document library	No	No
Site Pages	Wiki Page library	No	No
<i>Web Parts</i>			
Tools	Content Editor web part	N/A	Yes
Join	Join web part	N/A	Yes
What's Happening	What's Happening web part	N/A	Yes