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learn to use the tools

Set up your SharePoint site
and manage it effectively

Leverage cloud-based
online features

Rosemarie Withee
Ken Withee



SharePoint[®] 2016

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by Rosemarie Withee
and Ken Withee

for
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SharePoint® 2016 For Dummies®

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Introduction

A centralized web portal has become a necessity in organizations both small and large. An integrated portal provides efficiencies and advantages not seen since the adoption of computers and networks. The value of getting everyone in the organization on the same page and working in unison is instrumental to success. Modern organizations have had to adapt, and the people within them have had to adapt as well. As technology giants fought to get their web portal products to market, one platform has emerged a clear winner: Microsoft SharePoint.

We wish we could say that we foresaw the success of SharePoint back when we first started working with it as consultants. The fact is that when we were new consultants, we simply worked on whatever projects were selling. Nearly a decade ago, Ken stumbled into a small SharePoint project, pulled Rosemarie into SharePoint, and we still haven't emerged from the SharePoint world.

SharePoint 2016 is the latest version of the product and has more fanfare attached to it than any previous version. Microsoft products tend to get better over time. (Some of our friends won't buy a Microsoft product until it's the third version or later.) SharePoint 2016 won't disappoint; it's a very mature and polished product.



TIP

The release of SharePoint 2016 ushers in the evolved strategy for SharePoint Online. No longer do you need to wait a couple of years to use the latest version of SharePoint in the Microsoft cloud. SharePoint Online uses SharePoint 2016, and everything you read about in this book directly relates to SharePoint Online. In fact, if you use SharePoint Online, then you will likely have already used some of the new features of SharePoint 2016. Microsoft now rolls out features to SharePoint Online as they are ready and then packages all of those features into a grand release for those who want to install SharePoint themselves. The latest release being SharePoint 2016.

If you're already familiar with SharePoint, then this latest version of the product will be familiar, and many of the annoying and painful bugs and interfaces of previous versions have finally been worked out. You no longer need a highly paid consultant to walk you through each aspect of every feature. In a nutshell, things are finally starting to get intuitive. (Although, if you need a consultant, we can recommend some good ones.)

Whether you need to create a new website for your team, a new app to store content, or a page to approve and publish critical information, SharePoint 2016 has a solution. SharePoint 2016 is intended to be a self-service environment, and this book helps you get the most out of the platform.

We're not saying that SharePoint is always easy; in fact, like any enterprise software system, you can expect some frustration. However, if your organization uses SharePoint 2016 or SharePoint Online, you have a wealth of solutions to solve your particular needs.

About This Book

This book is intended for anyone who encounters SharePoint or is curious about using the product. SharePoint is a vast product with many nooks and crannies, and no single book can cover all the pieces. This book is designed to provide an introduction and overview of the platform. It shows you how to get the most out of the product, whether you have never used it before or are deeply familiar with specific aspects it.

Others who may benefit from this book include

- » **Developers:** This isn't a development book, but the best SharePoint developers are those who understand the product. The exciting aspect of SharePoint development is that you don't need to write programming code to develop business solutions in SharePoint. If you can work with a web browser to develop a web presence in a site like Facebook or LinkedIn, then you can develop and administer your own SharePoint site.
- » **IT professionals:** This isn't a book that explains how to set up a SharePoint server farm. However, this book helps you understand what features your end users may want to see in a SharePoint farm that you architect or support.
- » **Managers:** If you manage a department or business unit, you need to understand how to get the most out of SharePoint. If your company has made significant investments in SharePoint deployment, it'd be a shame if you didn't know how to leverage that investment.

Foolish Assumptions

Because SharePoint is such a huge topic, we have to make some assumptions about your configuration and starting knowledge, such as

- » **You have access to some version of SharePoint 2016.** If you don't have access to SharePoint, then sign up for SharePoint Online. After the free trial period, it costs as little as \$5 a month. If you want to see all the specific things that come with the On-Premises version of the product, then there is a trial license available for 30 days. Just download it from the Microsoft download center and get started.
- » **You're a contributor or administrator.** Of course, many of the scenarios in this book require only that you be a contributor. So long as you know who your administrator is, you can ask that person for elevated permissions. And if you want to be master of your own SharePoint universe as an administrator, you can sign up for SharePoint Online and control all aspects of your SharePoint environment in a fairly intuitive interface.
- » **Ideally, you have a sandbox or test environment where you can try different scenarios.** It isn't the best strategy to lock down security on your Human Resources site only to find out nobody in your entire organization can get to their pay stub. You need a test environment or test site where you can play around with SharePoint, and then take that knowledge to your department site. Luckily, if you have access to SharePoint, you have your own personal My Site that you can explore. Another alternative is to use SharePoint Online (yes, you can buy a single license).
- » **Many of the scenarios in this book assume your implementation includes My Site.** Unfortunately, many companies try to avoid using this feature. In SharePoint 2016, My Site is an integral component for many features. We strongly advise utilizing My Site for everyone in your organization.

Icons Used in This Book

You find a handful of icons in this book, and here's what they mean:



TIP

Tips point out a handy shortcut, or they help you understand something important to SharePoint.



REMEMBER

This icon marks something to remember, such as how you handle a particularly tricky part of SharePoint configuration.



TECHNICAL
STUFF

This icon is our chance to share with you details about the inner workings of SharePoint. Most of the information you find here pertains to some aspect of SharePoint that requires configuration at the server. That means you can point out the stuff beside this icon to IT and ask IT to make SharePoint do that.



WARNING

Although the Warning icon appears rarely, when you need to be wary of a problem or common pitfall, this icon lets you know.

Beyond the Book

In addition to what you're reading right now, this product also comes with a free access-anywhere Cheat Sheet that describes some common SharePoint site templates, apps, and Web Parts, among other things. To get this Cheat Sheet, simply go to www.dummies.com and enter **SharePoint 2016 For Dummies Cheat Sheet** in the Search box.

Where to Go from Here

All right, you're all set and ready to jump into this book. You can jump in anywhere you like — the book was written to allow you to do just that. But if you want to get the full story from the beginning, jump to Chapter 1 — that's where all the action starts. (If you are already familiar with SharePoint, you might want to flip ahead to Chapter 2, where you can get your hands dirty with creating a site and developing it to fit your needs.)

1

Getting Started with SharePoint 2016

IN THIS PART . . .

Get familiar with SharePoint as a product and platform. SharePoint is a complicated beast, and most people use only a smidgen of its functionality.

Dive into a quick intro into what makes up the SharePoint Online product and get a handle on the buzzwords around SharePoint.

Figure out what it means to develop a SharePoint site and how SharePoint works at a fundamental level.

Get your head around the vastness of SharePoint by exploring some of its functionality at a high level.

IN THIS CHAPTER

Gaining a general understanding of SharePoint

Exploring how the product is put together

Getting familiar with SharePoint concepts

Seeing how SharePoint works at a fundamental level

Chapter 1

Getting to Know SharePoint 2016

When we first heard about SharePoint, we just didn't get it. What the heck was this new thing called SharePoint? We knew it was a Microsoft product that was supposed to do lots of things, but we just couldn't figure out exactly what it was or how to get started working with it.

Well, after years of working with SharePoint, we have finally figured a few things out. SharePoint is indeed a Microsoft product and it is definitely capable of doing lots of things. In fact, SharePoint can do more things than you could ever imagine. And therein lies the problem. If you ask ten people what SharePoint does, you're very likely to get ten different answers. SharePoint has such a depth to it that it's hard to get your head around it.

In this chapter, we help you see the SharePoint big picture. You discover how SharePoint works and gain understanding on exactly what the term *SharePoint* means. This chapter peels away the mystery and shows you SharePoint at a basic level. After all, you need to understand SharePoint at a basic level before you can dive into its advanced functionality.

Wrapping Your Head around SharePoint

At a basic level, SharePoint is a *web-based software platform*, meaning that SharePoint is software designed for you to interact with using a web browser.



TIP

In past versions of SharePoint, you really needed to use Microsoft's web browser to work with SharePoint. Times have changed though, and you can now use most any web browser to work with SharePoint.

No, really, what is SharePoint?

Maybe you're a whiz at Word or a spreadsheet jockey with Excel. Going forward, you're going to have to be just as good at SharePoint to get the most out of your desktop Office client applications. Microsoft continues to integrate functionality that used to be locked up in client applications, or not available at all, with SharePoint. For example, using SharePoint 2016 with Office 2016, you can create an online gallery of PowerPoint slides, display interactive spreadsheets in web pages, or reuse information from your company's databases in Word documents. You can even use Visio 2016 to automate your business processes using SharePoint.

Officially, Microsoft represents SharePoint 2016 as a “business collaboration platform for the enterprise and web.” *SharePoint* is a platform from Microsoft that allows businesses to meet their diverse needs in the following domains:

- » **Collaboration:** Use SharePoint's collaboration sites for activities, such as managing projects or coordinating a request for proposal.
- » **Social networking:** If you work in a large company, you can use SharePoint as a social network for the Enterprise experience to help you track coworkers and locate people in expertise networks.
- » **Information portals and internal websites:** With SharePoint's web content management features, you can create useful self-service internal portals and intranets.
- » **Enterprise content management:** SharePoint offers excellent document- and record-management capabilities, including extensive support for metadata and customized search experiences.
- » **Business intelligence:** SharePoint is an ideal platform for providing entrée into your organization's business analysis assets. You can use insightful dashboards that allow users to get the big picture at a glance and then drill down to get more detail.

- » **Business applications:** Use SharePoint to host sophisticated business applications, integrate business processes' backend databases and your SharePoint content, or simply use SharePoint as the means to present access to your applications.

The functionality we discuss in the preceding list is delivered by an On-Premises version of the product and an online cloud service:

- » **SharePoint Server 2016** is a set of applications that deliver all the functionality mentioned in the previous bulleted list. When SharePoint is installed locally and managed by your IT department, then you're using SharePoint in what is known as an on-premises environment because it is hosted on your local premises.
- » **SharePoint Online** is a cloud-based service offered by Microsoft that allows you to create much the same SharePoint experience as you can with SharePoint installed on a local server, but you don't have to install and maintain it. It can come bundled with an Office 365 monthly subscription, giving you access to hosted email, calendaring, and conferencing with Exchange and Skype for Business, or you can buy a SharePoint Online monthly subscription on its own.



TIP

SharePoint Server 2016 has been designed to work with SharePoint Online. Some organizations prefer to keep sensitive content under their own control but still leverage the ease of use and other benefits of SharePoint Online. For this reason, Microsoft designed SharePoint Server 2016 to integrate with SharePoint Online. This scenario is called a *hybrid environment* because part of SharePoint is on your local premises and part is hosted up in the Microsoft cloud.

You can approach SharePoint with the following model in mind:

- » **Product:** SharePoint is a product with a lot of features. Explore how SharePoint works without any customization when you're deciding how to approach a solution, and then decide if you want to customize it for your specific needs.
- » **Platform:** SharePoint provides everything you need to deliver a robust business solution. It provides the infrastructure (the "plumbing") required to deliver web-based solutions.
- » **Toolkit:** Finally, SharePoint is a set of components and controls that you can mix and match to provide a solution. You can create sites, pages, and apps, all without leaving the comfort of your web browser.

A Microsoft product

SharePoint is a software product that Microsoft develops and sells to customers. As you see in Chapter 2, SharePoint can be purchased in a couple of different ways. Regardless of how you purchase and use SharePoint, you can be rest assured that your organization is paying Microsoft a licensing fee. In other words, SharePoint isn't free.

In the past, SharePoint had a very large cost for an organization wishing to adopt it. In addition to buying all of the licenses for your organization, you also need an IT team to install and manage SharePoint. For this reason, SharePoint used to be considered enterprise-class software because only large organizations could afford it. This is all changing though, and Microsoft now offers SharePoint Online for as little as \$5 per user per month.



TIP

Microsoft also offers SharePoint Online as a bundle of other products. The branding for the bundle of products is called Office 365. To find out more about Office 365, check out *Office 365 For Dummies* 2nd Edition by Rosemarie Withee (Wiley).

Many different SharePoint definitions

SharePoint has many different types of users, and depending on where your role fits in, you might have a very different experience from a fellow SharePoint user. For example, you might be assigned to create and administer a SharePoint website for your team. In this case, you might see first-hand the vast functionality of SharePoint websites. On the other hand, you might be a user of a SharePoint site. In this case, your SharePoint world might be only the site that someone has already created for you. To confuse matters even further, many organizations will roll out SharePoint and give it a spiffy internal name; for example, “Connect.” So even though the cool new web tool called Connect is actually SharePoint, most users don't even realize it!

On the more technical side, if you're an infrastructure administrator, you see SharePoint as a platform capable of offloading the difficult job of website administration. If you're a software developer, you see SharePoint as a web platform for developing programs for users.

The vastness of SharePoint creates areas of specialization. The result is that a person's view of SharePoint is greatly affected by how that person uses the product. It's important to keep this in mind when talking with people about SharePoint. If you ask ten people to define SharePoint, you're likely to get ten different answers, as illustrated in Figure 1-1.

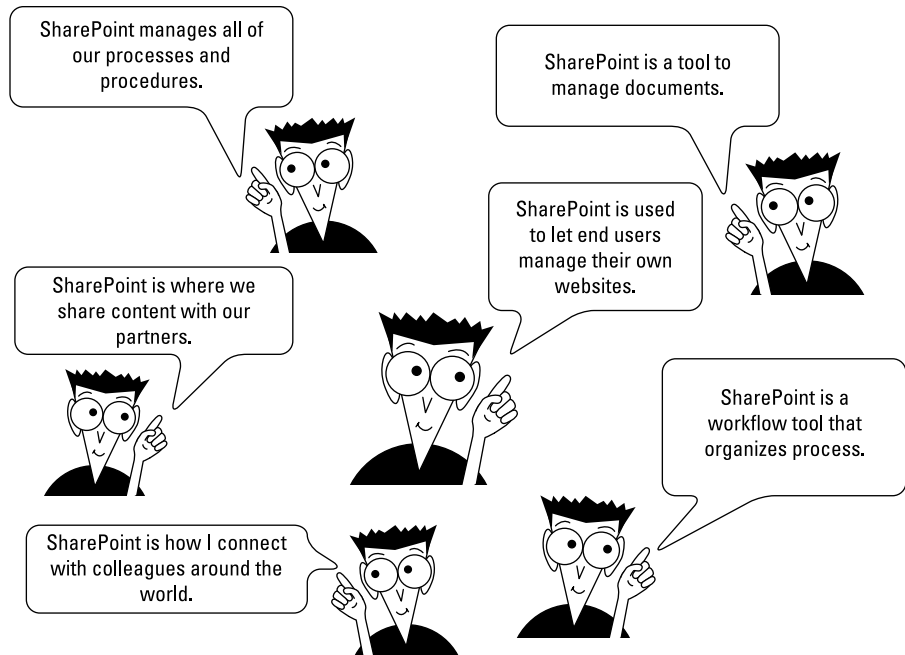


FIGURE 1-1:
There are many different ways to define SharePoint.



TIP

SharePoint has many different administration levels, and each requires a different level of technical ability. For example, if you're comfortable working with software like Microsoft Word and Excel, then you won't have any problem administering a SharePoint site. At a deeper level, there are also SharePoint infrastructure administrators. To administer SharePoint at the infrastructure level is a role that falls squarely into the realm of the IT geeks.

SharePoint is a platform, so the user roles an organization defines depend on the organization itself. Here are some examples of the possible roles of users in SharePoint:

- » **Anonymous visitor:** A person that browses to a website that just happens to be using the SharePoint platform. An anonymous visitor just sees SharePoint as a website and nothing else.
- » **SharePoint visitor:** A person that browses to the site and authenticates so that SharePoint knows who they are. The visitor might still just see a SharePoint site as any other website, except he notices his name in the top-right corner of the screen and knows he must log in to reach the site. Visitors might not use any of the features of SharePoint, however, and just browse the information posted to the website.
- » **SharePoint casual user:** A person that knows all the company documents are posted to SharePoint and knows she can upload her own documents to

her personal SharePoint site. A casual user might realize that she is using SharePoint, or she might just think of the platform as the name the organization has given to SharePoint. For example, I have seen organizations give their web platform tool names such as Source or Smart or Knowledge Center. SharePoint is the name of the web platform product from Microsoft, which is often unknown by users of a tool built on the SharePoint platform.

- » **SharePoint user:** A person that is familiar with SharePoint and its main features. A SharePoint user often performs various administrator functions even if he doesn't realize it. For example, he might be responsible for an app that stores all the company policies and procedures. He is thus an app administrator. A user might also be responsible for a site for a small team, in which case he is a site administrator. As you can see, a user can play many different roles.
- » **SharePoint power user:** A power user is not only familiar with the main SharePoint features and functionality but also dives deeper. A power user might be familiar with the functionality differences of different features, routing documents using workflows, and building site hierarchies. A power user might also be a site collection administrator and thus is responsible for a collection of sites.
- » **SharePoint technical administrator:** A technical administrator is someone from the IT department who is responsible for SharePoint. A technical administrator is less concerned with using SharePoint for business and more concerned about making sure the platform is available and responsive. An administrator might play many different roles. For example, farm administrators are responsible for all the servers that make up SharePoint, such as web front end servers, applications servers, and database servers. Specialized database administrators focus just on the database components. There are even administrative roles for specific services, such as the search service or user profile service. Depending on the size of the SharePoint implementation, these technical administrator roles might be filled by a single overworked individual or a team with highly specialized skills.

More than a website

SharePoint is called a *web platform*, as opposed to just a website, because of the sheer amount of functionality and capabilities it includes. In fact, if you already administer a SharePoint website, you can easily create a new website right within the existing website. You can also develop websites with an extraordinary amount of functionality without writing a single line of code. The result is a platform for websites instead of just a single website. The multitude of features and the complexity of the product are what lead to confusion.

THE DIFFERENCE BETWEEN SOCIAL MEDIA AND SHAREPOINT

SharePoint and social media websites such as Facebook, LinkedIn, and Twitter are similar in that you interact with them using your web browser. The difference is in the intended use. Facebook, LinkedIn, and Twitter are designed for consumers as a whole, whereas SharePoint is designed for individual organizations.

SharePoint has many of the social and profile features of Facebook, LinkedIn, and Twitter, but these features are only available to people within your organization. In other words, only the people in your organization can use the features of SharePoint. Although SharePoint includes social and profile features, it also includes much, much more. Think of SharePoint as a product for business and productivity that also happens to have the social and profile features of sites such as Facebook, LinkedIn, and Twitter.



TIP

The terms *SharePoint website* and *SharePoint site* can be used interchangeably. Both terms mean a website that is powered by SharePoint. Because this book is all about SharePoint, we sometimes abbreviate these terms to just *site*.

One thing that makes SharePoint so special is that you don't need to be a computer genius or even a power user to be a website developer and administrator in SharePoint. You just need to be comfortable using a computer.



TIP

The terms *website* and *web application* are often used interchangeably. In the deep, dark technical world of SharePoint administration, the term *web application* has a very specific meaning. A web application is a technical construct, and each web application has its own databases associated with it. If you create two SharePoint web applications, they store their content and configuration information in different databases. As with technology these days, a simple word can have different meanings, depending on the context of the conversation.

Getting Familiar with SharePoint Building Blocks

In order to obtain a perspective on SharePoint, it is important to understand how SharePoint is put together. As mentioned previously, SharePoint is a web-based platform. A number of technologies are required in order to make the platform available. Each technology builds on the one below it. In this manner, it is common to call the whole ball of wax a *technology stack*.

The SharePoint technology stack begins with server computers running the Microsoft Windows Server operating system. On top of Windows Server are some additional technologies required by SharePoint. In particular, SharePoint needs a database and a web server — Microsoft SQL Server and Microsoft Internet Information Services (IIS), respectively. In addition, SharePoint also needs Active Directory, which manages the servers in the domain. Only when this entire stack of technology is available can you install SharePoint, as shown in Figure 1-2.

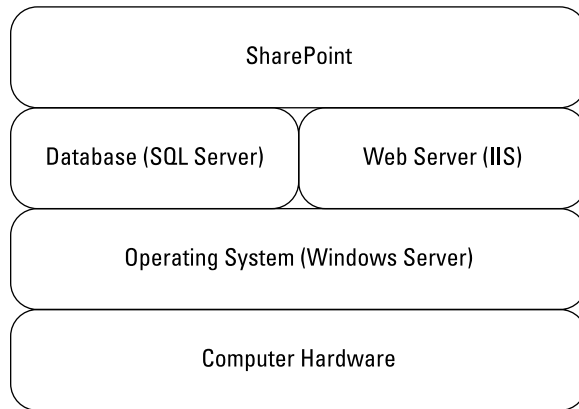


FIGURE 1-2: The stack of technologies that make up SharePoint.



WARNING

SharePoint will only work with the Microsoft stack of supporting technologies. For example, you cannot swap in an Oracle database or the open source Apache web server. SharePoint would simply refuse to install and might ask you what the heck you are trying to do using a non-Microsoft product to install SharePoint.

Taking a Peek at a SharePoint Site

The primary purpose of SharePoint is to provide websites. When you create a website, you select which type of template you want to use to create the site. The dialog box shown in Figure 1-3 shows the different templates available. Creating a site is explored in detail in Chapter 4.

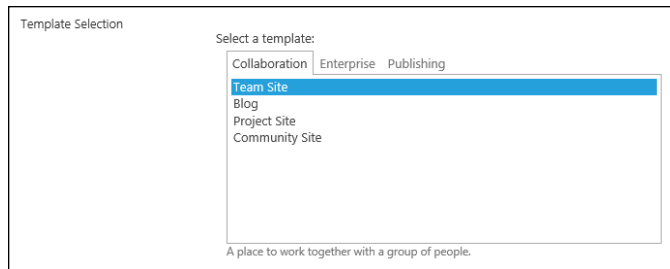


TIP

The templates you have available depend on where you are creating your SharePoint site and what features have been activated for your SharePoint environment. For example, in SharePoint Online, a tab for Duet Enterprise and Publishing only shows up if the feature is activated.

The template tells SharePoint which features and functionality should be included on the site. Keep in mind that you can always add more features and add and remove features as you decide to make your site more specific for your needs.

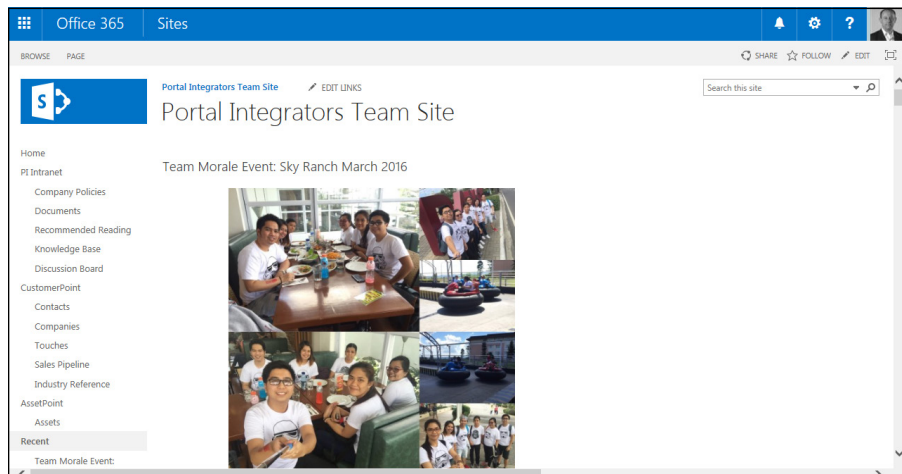
FIGURE 1-3:
The dialog box
used to select a
website template
when creating a
SharePoint site.



One of the most common SharePoint site templates is called the Team Site template. The Team Site website template includes features such as a discussion board, library to store documents, and a calendar. In fact, many books simply talk about the Team Site template and call that SharePoint. As you will learn in this book, the Team Site is very important, but it is just another SharePoint website template. Part 2 explores building a site based on the Team Site template.

A SharePoint website created using the Team Site template is shown in Figure 1-4. This team site has been customized a bit to show the latest team morale event for Portal Integrators along with some additional navigational items.

FIGURE 1-4:
A standard
SharePoint
website created
using the Team
Site template.



Getting Familiar with SharePoint Terminology

You should add a number of terms to your SharePoint vocabulary. Some terms are made up by Microsoft marketing, some are industry standards, and others are

buzzwords that have grown to have various meanings depending on the context of the conversation. In the following sections, I describe the various components of SharePoint, how the terms that define functionality fit together, and what they mean.

Branding

The term *branding* refers to the way a SharePoint site looks and behaves to users. Branding includes things like the colors, fonts, images, logos, and layout of the various components on a site. Branding your SharePoint 2016 site will be covered in Chapter 13.

The term branding is not specific to SharePoint and refers to the way something looks and behaves. The term is borrowed from the marketing industry in which an organization will brand its product. For example, Coca-Cola has a very strong brand. In the software world, branding refers to the look and feel of a piece of software or website.

Business Connectivity Services

Business Connectivity Services (BCS) is a specific feature of SharePoint Server. BCS enables you to connect SharePoint with external systems. For example, say you have a customer relationship system and you need SharePoint to interact with the data in that system. You could use BCS to make it happen.



TIP

BCS can be a fairly in-depth piece of SharePoint and also often requires the skill-set of a developer.

Business intelligence

The term *business intelligence* is definitely not new. An article was published in the October 1958 edition of the *IBM Journal* by H. P. Luhn called “A Business Intelligence System.” The article describes how an organization can process documents in order to make business decisions. Business intelligence has continued to evolve over the years and has morphed into something of a catch-all phrase for using data to drive business.

In the Microsoft realm, business intelligence consists of a number of different technologies. In fact, I wrote an entire sister book on the subject — *Microsoft Business Intelligence For Dummies* by Ken Withee (Wiley). As SharePoint has become a central and nearly ubiquitous application, it has also become a prime place to show the data that decision makers need to make decisions. In other words,