

Using SharePoint from a Mac: Overview

This manual provides information and recommendations for Mac SharePoint Users at Fermilab.

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Introduction

SharePoint offers many useful features such as creating web content; content management; document management; and a collaborative working environment with wikis, blogs, task lists, work flows, discussion forums, calendars, forms, ... Most of the features can be used from any type of computer with an Explorer, Firefox, Chrome or Safari web browser.

However, there are some features that cannot be used from the Mac or require workarounds. This article will document these items and give recommendations for getting started and using SharePoint from a Mac.

Getting Started

SharePoint Username and Password

To get started using SharePoint (from any type of computer), you will need a Fermilab Services account because you will use your Services account username and password to sign in to SharePoint. This is the same account you are using if you are filling out a Fermilab online time sheet. If you do not already have a Fermilab Services account, you can request one at:

http://computing.fnal.gov/xms/Services/Getting_Started/Introduction_to_Computing_at_Fermilab
http://computing.fnal.gov/xms/Services/Getting_Services/Accounts_and_Passwords/Services_Accounts

Recommended Browser (Firefox)

We recommend Mac users use a recent version of Firefox to access SharePoint. Microsoft has better support for Firefox access to SharePoint than Safari Access. Microsoft also supports Google Chrome for access to SharePoint, but we have not tested with this. Firefox for Mac OSX can be downloaded from:

<http://www.mozilla.org/en-US/firefox/new/>

Follow the download instructions given on the web page that appears after the download window comes up.

Recommended Media Player (Silverlight)

We highly recommend Mac users download the media player Silverlight before using SharePoint. Silverlight is an application that enables multimedia, graphics and animation to run optimally on SharePoint. The SharePoint user interface uses Silverlight to provide many points of functionality.

Mac users need to install Silverlight because it is not already installed on Macs by default. The SharePoint user interface will be improved with Silverlight and you will also be able to view SharePoint Help videos that you wouldn't otherwise be able to view.

You can check to make sure the Silverlight Player is installed on your system by going to:

<http://www.microsoft.com/getsilverlight/>

If Silverlight is not installed on your system, you can follow the instructions on that page to install it.

Recommended Version of Microsoft Office (2011)

We recommend users get version 2011 or higher of Microsoft Office. Users with Fermilab-purchased Macs are entitled to use this and it integrates better with SharePoint. For example, Word documents can be edited and saved to SharePoint instead of having to download, edit and then upload them. Word from Office 2011 has a "Save to SharePoint" feature that automatically uploads back to SharePoint for you.

More Help for Getting Started with SharePoint

If you would like help getting started with SharePoint, you can make a Service Desk ticket to:

- Request a sandbox area to experiment with SharePoint features.
- Request a site for your group, experiment or project.
- Request training or other assistance with SharePoint.

Overview of the Main Differences When Using SharePoint From a Mac

Many SharePoint features can be used from a Mac without issue. However, There are some SharePoint features that require workarounds or cannot be used from a Mac. This section will give an overview of these differences and recommendations for addressing them. Instructions for these recommendations are provided later in this document.

For all of these differences, one solution is to use virtualization to allow you to use your Mac to access SharePoint from Windows using Internet Explorer. See the "Virtualization ..." section of this document for information about doing this.

Workarounds

Below is a list of functions that cannot be used from or run on a Mac in the same way as they are done from Windows using Internet Explorer, but there is a workaround or additional software that allows some or all of the functionality to be accomplished in a different way.

Saving Office Documents

When you click on an Office Document in SharePoint to start editing it, if you use the usual "File->Save" to save it, it will save a local copy on your computer. You would then need to upload your document to save your changes to the SharePoint copy. If you prefer to save it directly to SharePoint, you can do this by using "File -> Share -> Save to SharePoint" menu option. If you clicked on you document in SharePoint to edit it, and you have not saved it locally yet, then the SharePoint location you got it from will be in the Recent Locations list, so you can just click on that location and Save. If the location you want to save it to is not in the Recent or Saved Locations lists, you can just type the SharePoint destination URL in the "Save as ..." text field and then click on Save to save it to SharePoint.

Uploading and Downloading Multiple Files

From a Mac, SharePoint allows uploading or downloading only one file at a time. However, multiple file upload and download can be accomplished on a Mac with a product called "Microsoft Document Connection" that comes with Microsoft Office 2008 and higher. If you have a Fermilab-purchased Mac, you are entitled to have Office, so you can use the Document Connection software as needed. If you have a Fermilab-purchased Mac, but do not have Office 2008 Service Pack 2 or higher, you can make a service desk request to have it installed on your computer. We recommend getting and using Office 2011 as its' products integrate better with SharePoint. Instructions for getting started with Document Connection are provided in the instructions section of this document.

If you do not have Office or a Fermilab-purchased Mac, we have seen positive reviews for "SharePlus for Mac Pro" that allows uploading and downloading multiple items. This may be needed if you have an Ipad or iPhone or other mobile device that does not have Office. SharePlus is available from the Mac App store for \$15-\$20. More information is available at:

<http://www.SharePointmac.com/>

If you are using virtualization, Internet Explorer on Windows has a "Windows Explorer View" feature that you can use to upload and download multiple items to SharePoint.

Moving Multiple Files or List items

From a Mac, SharePoint allows copying and pasting to move only one item at a time. However, moving multiple items can be accomplished on a Mac using SharePoint's "Content and Structure" settings. An advantage of using the "Move" action with the "Content and Structure" approach is that meta-data

such as author and date etc, are retained. Instructions for moving items using "Content and Structure" are in the instructions section of this document.

Limitations

Below are some limitations to be aware of for this approach.

1. You need to have sufficient permissions such as Site Owner permissions. If you do not have the needed permissions, you can ask your site owner if they can move the needed items. (Technically, the permissions you need are "Manage Permissions", "Manage Web Site", and "Add and Customize Pages", but the "Site Owner" permissions group is the "out-of-the-box" group that has these permissions.)
2. You need to be moving items within the same site collection.
3. Folders, a whole list or a whole library cannot be moved this way. (You can create the needed empty folder, list or library and then move all the contained items in one action though.)
4. This can be done on a SharePoint "Publishing Site" or a "Team Site" if the Publishing Infrastructure site collection feature is enabled. (SharePoint has different types of sites. Most Fermilab SharePoint sites are of the Publishing or Team Site type.)

Caveats

If your "move" operation does not work, here are some things to check.

1. The destination list or library needs to be compatible with the items being moved. For example:

Content Type: If a destination library does not allow the content type of the document being moved, you will not be able to move the item.

Required Fields: If the destination library has a required field that is not in the document, you will not be able to move it. (You can work around this by temporarily changing it to "optional", moving the document(s), adding the needed fields, and then changing it back to "required".)

Versioning: If the original location has versioning enabled, then versioning will need to be enabled on the destination before moving content over.

2. Items that are checked out cannot be moved.
3. If you have not selected any items, "Move" will be grayed out. (You need to select the items first.)

Moving a Whole Library or List

Another approach that can be taken if a whole library or list needs to be moved is making a template of that list or library and then creating a new one (using that template) in the new location. The template can be created without the data (so you have an empty list or library with the same settings) or with the data (so it has all the contents of the list or library as well). You can also use this approach if you need to copy or move a list or library to another site collection by creating and downloading the template, and then uploading it into the destination site collection's Site gallery for use there. (The application SharePoint Designer is needed for this.)

Moving Web Parts in a Web Part Page

SharePoint has different types of pages such as "wiki" pages and "web part" pages. Wiki pages are free form and used by most Fermilab SharePoint sites. "Web part" pages have a fixed grid-like structure with rows and columns that web parts (such as announcements, lists, calendars, ...) fit into. If your site uses a "wiki" page, Mac and Windows users can drag-and-drop web parts to move them around in the page. If your site uses a "web part" page, you cannot "drag-and-drop" web parts around in the page to move them if you are using a Mac. However, you can edit a web part and move it to a different zone and position (row/column) to achieve the same effect. Instructions for changing zone and position are in the instructions section of this document.

Shortcomings

Below is a list of functions that cannot be used from or run on a Mac. The only way to do them is to use Windows and (usually) Explorer. You can use virtualization to use your Mac to access SharePoint from Windows with Internet Explorer to do these functions. See the "Virtualization ..." section of this document for information about doing this.

Datasheet View

This view allows you to bulk edit multiple list items at a time instead of having to edit items one-by-one. This option is grayed out when using a Mac.

One minor improvement that can be done on a Mac is to enable inline list editing so that you can view, copy and paste from all the items of a list while changing one item. This is not as useful as Datasheet View, but better than nothing. A video showing instructions for enabling inline editing is at:

<http://www.youtube.com/watch?v=HHb9dF9mo-g>

Moving Folder Hierarchies

This cannot be done from a Mac, but can be done using Explorer View when using Windows with Internet Explorer.

Side note: SharePoint experts generally discourage the use of folders anyway when possible because:

- They don't work as well with the navigation (show up in breadcrumb trail etc.)
- They don't work as well for having multiple organizations of items based on different criteria.
- They don't work as well for locating and searching items.

Users are encouraged instead to have all the items at the top level, but create different "views" of the items to filter and show different organizations of the items as needed.

InfoPath Designer and InfoPath Filler

InfoPath Designer is an application to design forms that is not available on the Mac, but is available on Windows. So Mac users can use the terminal server to access InfoPath Designer. Most Mac SharePoint users will not need to use this.

Note that Fermilab Mac users can fill out forms created with InfoPath Designer via SharePoint without using the terminal server if the forms are designed to be browser-compatible. (This is possible because Fermilab has the Enterprise Edition of SharePoint that includes InfoPath Forms Services that can convert forms to HTML and Javascript so a separate form filler client application is not needed.)

If the designed forms are not browser-compatible, Mac users will need to use the terminal server to use the Windows-only application InfoPath Filler to complete the forms in full.

If you are designing a form and you want it to be browser-compatible, use a browser-enabled form template when you make your form and use the design checker to check for browser-compatible errors in your form.

Here are examples of form features that are not browser compatible:

- Digital signature
- Role-based feature
- Ink picture control
- Multiple controls for sections
- Repeating rows for tables

For more information about this, please see:

- Specify the compatibility settings for a form template
<http://office.microsoft.com/en-us/infopath-help/specify-the-compatibility-settings-for-a-form-template-HA010031070.aspx>
- Designing Forms for SharePoint and InfoPath: Using InfoPath Designer 2010 (Book, Form Services chapter)
<http://books.google.com/books?id=zWYLp3zfvAC>

SharePoint Designer

SharePoint Designer is an application to customize SharePoint pages that is not available on the Mac, but is available on Windows. So Mac users can use the terminal server to access SharePoint Designer. Most Mac SharePoint users will not need to use this.

Virtualization for Using Windows and Internet Explorer from your Mac

Virtualization Options

Using virtualization allows you to use Windows and Internet Explorer from your Mac so you can access the full feature set of SharePoint. The major options are:

1. Fermilab Windows terminal server that you can log into from your Mac using remote connection software so you can use Windows
<http://www-css.fnal.gov/csi/fermi-ts-farm/fermi-ts-farm.html>
2. Parallels virtualization software for running Windows on your Mac
<http://www.parallels.com/products/desktop/>
3. VMware Fusion virtualization software for running Windows on your Mac
<http://www.vmware.com/products/fusion/>
4. Boot Camp virtualization software for running Windows on your Mac
<http://support.apple.com/kb/HT1461>

Recommendations

We recommend using the Fermilab Terminal Server for periodic access to Windows for SharePoint tasks. It has the needed features and does not have to be purchased.

If you need to have access to Windows full time, then you may wish to consider buying Parallels or VMware Fusion virtualization software. Note that you have to buy Windows and Microsoft Office licenses in addition to buying the virtualization software.

Both Parallels and VMware work well to provide virtual access to Windows on your Mac while letting you access your Mac OS and applications concurrently. Which one to pick is a matter of personal preference. An article comparing the two is available at:

<http://platinumdogs.wordpress.com/2011/12/07/vmware-fusion-4-for-mac-and-parallels-desktop-7-for-mac-smackdown/>

Boot Camp is another option for virtualization, however Boot Camp users need to re-boot their machine to switch between Mac OS and Windows. This allows better performance at the expense of not being able to run Mac applications concurrently. Boot Camp comes already installed with recent Mac OSX releases at no extra charge. However, you still need to buy a Windows and possibly an Office License.

Getting Started with the Fermilab Terminal Server

The Fermilab Terminal Server that provides access to the Windows environment needed for SharePoint is "fermi-ts-farm". This has the needed Internet Explorer versions and other applications that may be needed for SharePoint work.

To start using fermi-ts-farm you need to:

1. Get a Fermilab Windows account (username@FERMI.WIN.FNAL.GOV) and password. If you have a Fermilab Services or Kerberos account, you probably already have a Windows account. If you don't know your password, you can make a service desk request to get your Windows password reset via <http://servicedesk.fnal.gov/>
2. Get on the list of users who are allowed to access the Fermilab terminal servers. You can request this by making a service desk request to access fermi-ts-farm and listing the applications you need to use on Windows via <http://servicedesk.fnal.gov/>

If you need to use Office, include that in the ticket. If you do not have a Fermilab-purchased Mac (which gives you an Office license), then one may need to be purchased. If you need to use InfoPath or SharePoint Designer, mention those as well. But most users will not need to use these and additional permissions will be needed on your SharePoint site to use these.

3. Be on the on-site Fermilab network. If you are accessing the terminal server from off-site, you will need to get and use VPN (Virtual Private Network) Cisco AnyConnect VPN software on your Mac. You may already have this on your Mac. If not, you can submit a service desk ticket for assistance. More information about VPN is at:

http://computing.fnal.gov/xms/Services/Getting_Started/Getting_connected_to_Fermilab's_Network_remote

4. Download, install and configure the Mac remote desktop client software for accessing and using the Fermilab terminal server. Instructions for doing this and for using the Fermilab terminal server are in the instructions section of this document. More information about the terminal server is also at:

<http://www-css.fnal.gov/csi/fermi-ts-farm/fermi-ts-farm.html>

Getting Further Help and Resource Links

If you need further SharePoint help you can submit a service desk ticket to ask a question or to request training at: <http://servicedesk.fnal.gov/>.

Also here are some resource links for assistance:

- Fermilab SharePoint Training Manuals
[https://SharePoint.fnal.gov/cd/sites/com/SharePointCOM/Training Manuals/](https://SharePoint.fnal.gov/cd/sites/com/SharePointCOM/Training%20Manuals/)
- Fermilab SharePoint Help
<https://SharePoint.fnal.gov/help/>
- Microsoft SharePoint Help (including videos)
<http://office.microsoft.com/serverhelp/helphome14.aspx?ck=WSSEndUser&products=WSSEndUser&cid=1033&SYSLCID=1033&UILCID=1033&Version=14>

Conclusions and Summary Recommendations

Most SharePoint features work on a Mac, but a few require workarounds or using virtualization to use Windows and Internet Explorer from your Mac. Here is a summary of our recommendation to make SharePoint easier to use from a Mac.

- Use the Firefox browser.
- Download the Silverlight media player.
- Use Microsoft Office 2011 or higher.
- You can use save Office documents to SharePoint by using “File -> Share -> Save to SharePoint”.
- You can use Document Connection (in Office) to upload/download/etc. multiple files.
- You can make a list or document library template to move a whole list or library.
- You can use SharePoint's "Content and Structure" feature to move multiple items.
- You can edit a web part and change it's zone & location to move a web part in a web part page.

When you need full SharePoint features from using Windows and Internet Explorer, use Fermilab's terminal server ‘fermi-ts-farm’ to access Windows from your Mac. You can transfer files back and forth easily using the terminal server's mechanisms for access to your local Mac home folder, AFS, CDServer or Bluearc files. Use the terminal server to use:

- Explorer View to more easily upload and download files and folders to SharePoint.
- Datasheet View to bulk-edit multiple items in a list.
- Drag and Drop to move items around more easily on a web part page.
- InfoPath Designer to design forms.
- InfoPath Filler to fill out forms (if not browser-compatible).
- SharePoint Designer to customize SharePoint pages.