

Using SharePoint from a Mac

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

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Introduction and Summary Recommendations

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 Internet 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. We welcome feedback and corrections as each user's experience is different and we want this document to be as useful as possible.

Please refer to the [Fermilab SharePoint 2010 End-user Training Manual](#) for information about logging into SharePoint and the basics of using SharePoint. This guide does not replicate that information.

Please refer to [Using SharePoint from a Mac: Terminal Server Instructions](#) for instructions for using the terminal server to access Windows and Internet Explorer for SharePoint tasks that cannot be done on the Mac.

Here is a summary of our recommendations 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 local 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 its' 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:

- Windows 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.

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/>

After the download window comes up, follow the download instructions given on the web page that appears.

Recommended Media Player (Silverlight)

We highly recommend downloading the Silverlight media player 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 features.

Mac users need to install Silverlight. It is not already installed on Macs by default. The SharePoint user interface will improve with Silverlight. 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 documents back to SharePoint for you.

More Help for Getting Started with SharePoint

If you would like help getting started with SharePoint, fill out 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 instructions and recommendations for addressing them.

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. (Please refer to [Using SharePoint from a Mac: Terminal Server Instructions](#) for more information.)

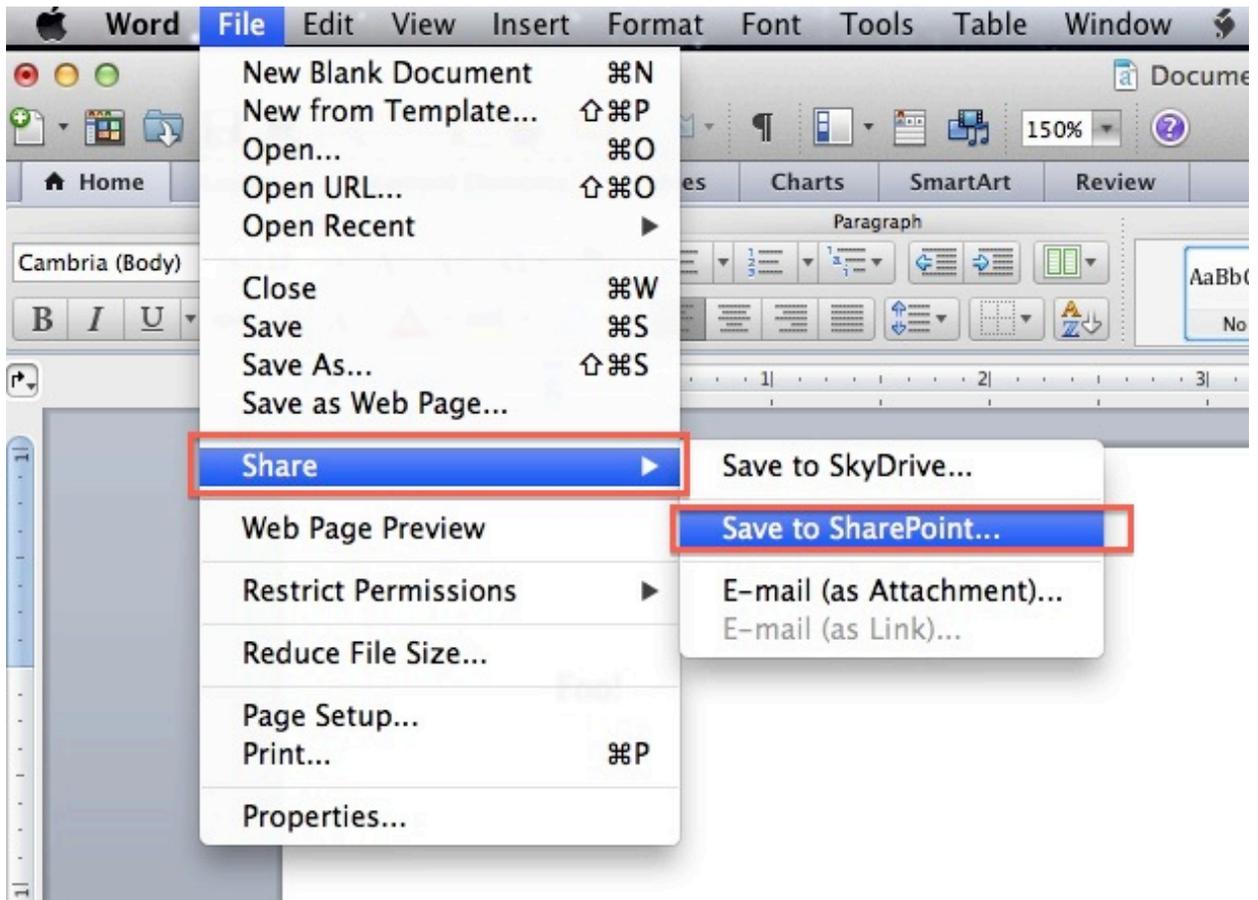
Workarounds

Below is a list of functions that cannot be used from or run on a Mac in the same way they are run from Windows (using Internet Explorer). This document describes workarounds or additional software that allows some or all of the functionality to be accomplished in a different way.

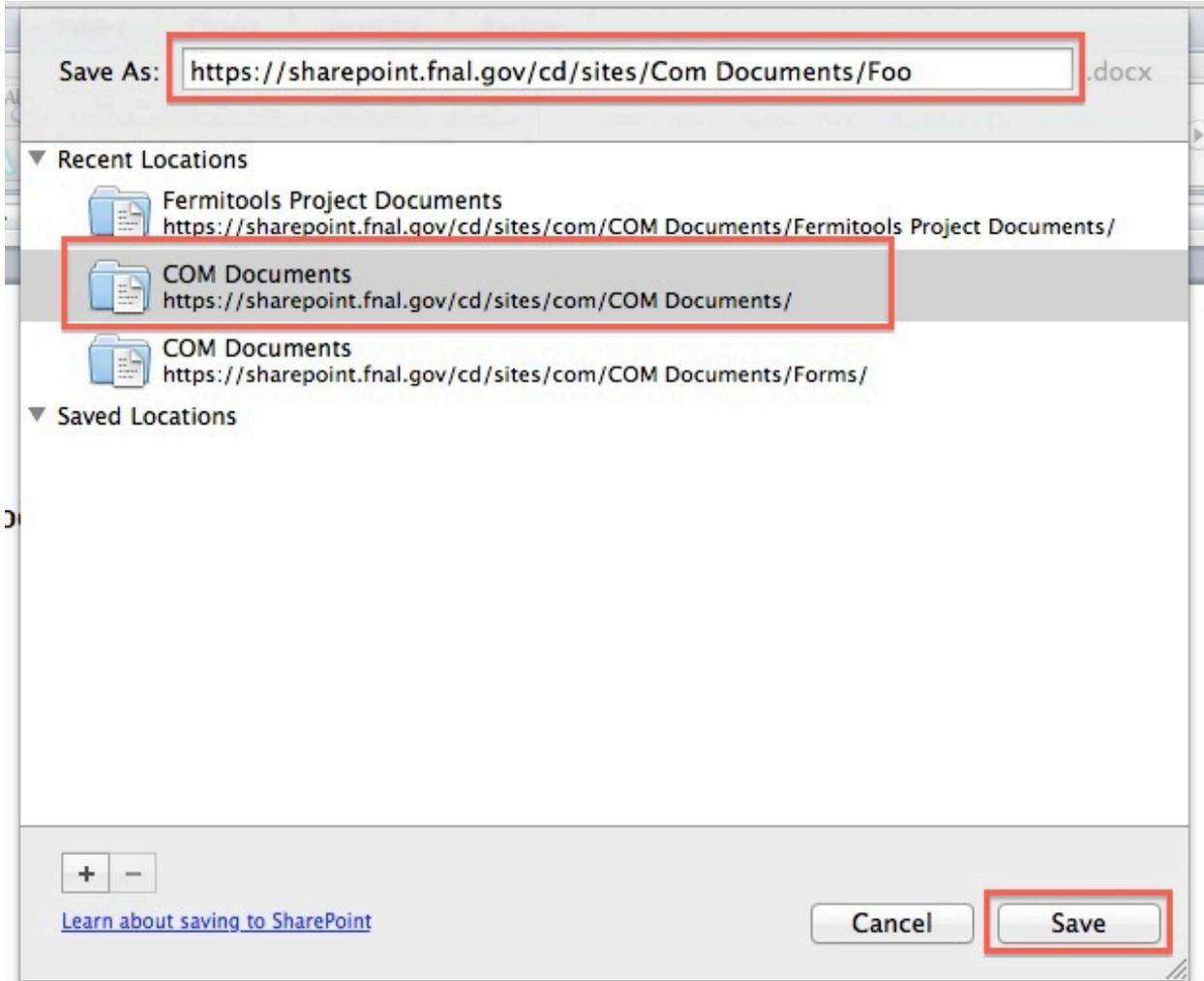
Saving Office 2011 Documents to SharePoint

If you have opened an Office 2011 document locally and want to save your changes directly to SharePoint (without having to upload your document after you have saved it), you can do this by using the **File -> Share -> Save to SharePoint** menu option using the instructions below.

1. From the **File** menu, select **Share** and then **Save to SharePoint**.



2. When the **Save to SharePoint** dialog appears, select your desired destination in SharePoint from **Recent** or **Saved Locations** if it is there. If your document location is not in the **Recent** or **Saved Locations** list, you can type the SharePoint destination URL in the **Save As** text field in the dialog box.



3. Click **Save** to save your document directly to SharePoint.

Uploading and Downloading Multiple Files

From a Mac, SharePoint allows uploading or downloading only one file at a time. However, multiple file uploads and downloads can be accomplished on a Mac with a product called "Microsoft Document Connection" that comes with Microsoft Office 2008 and higher. This application allows you to drag-and-drop files into a SharePoint library as if it were a local folder on your Mac.

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

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. (Please refer to [Using SharePoint from a Mac: Terminal Server Instructions](#) for more information about using virtualization.)

Use the instructions below to get started using Document Connection.

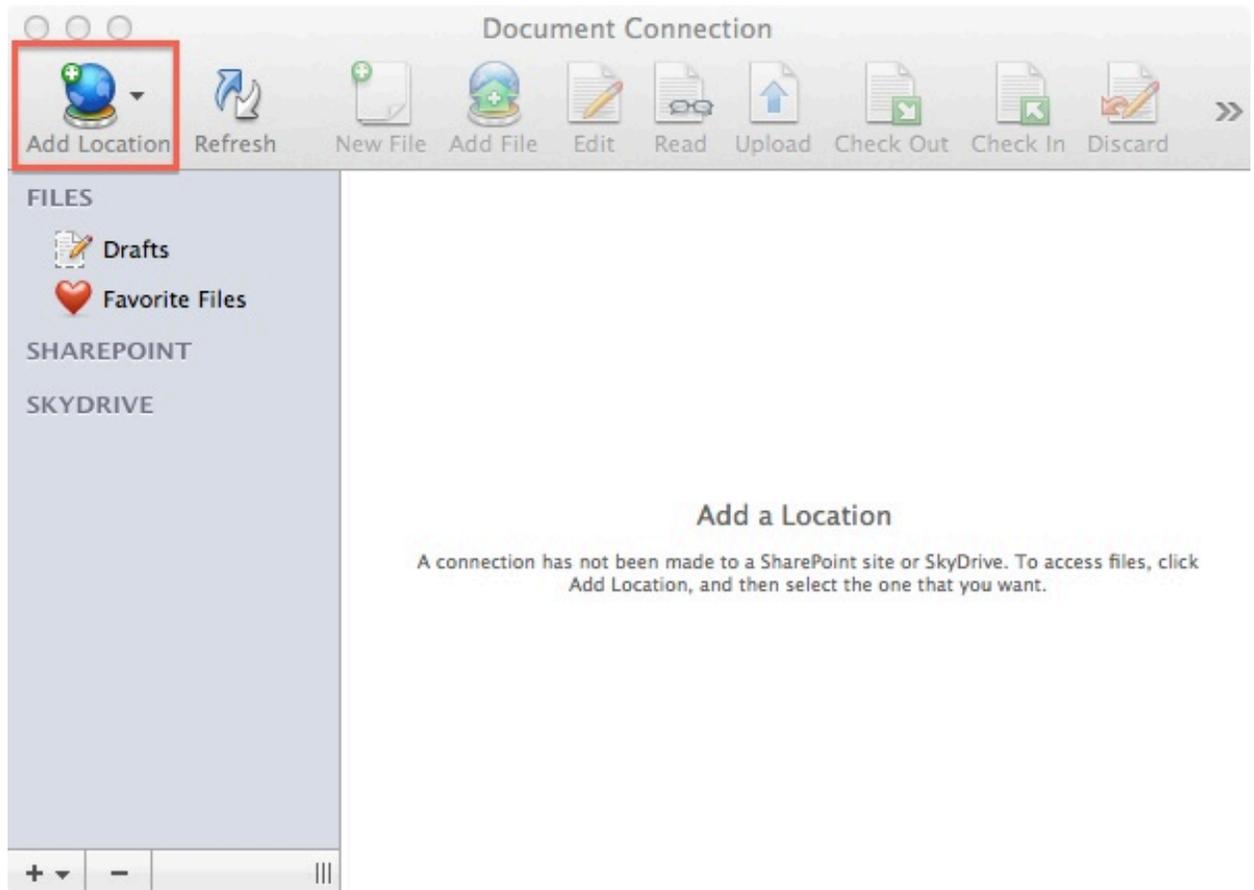
Finding and Starting Document Connection

Document Connection is included in Office 2008 SP2 or later. Document Connection is available from the Office folder of your applications folder. Double-click it to launch Document Connection. You can drag the Document Connection icon into your dock if you will be using it frequently.

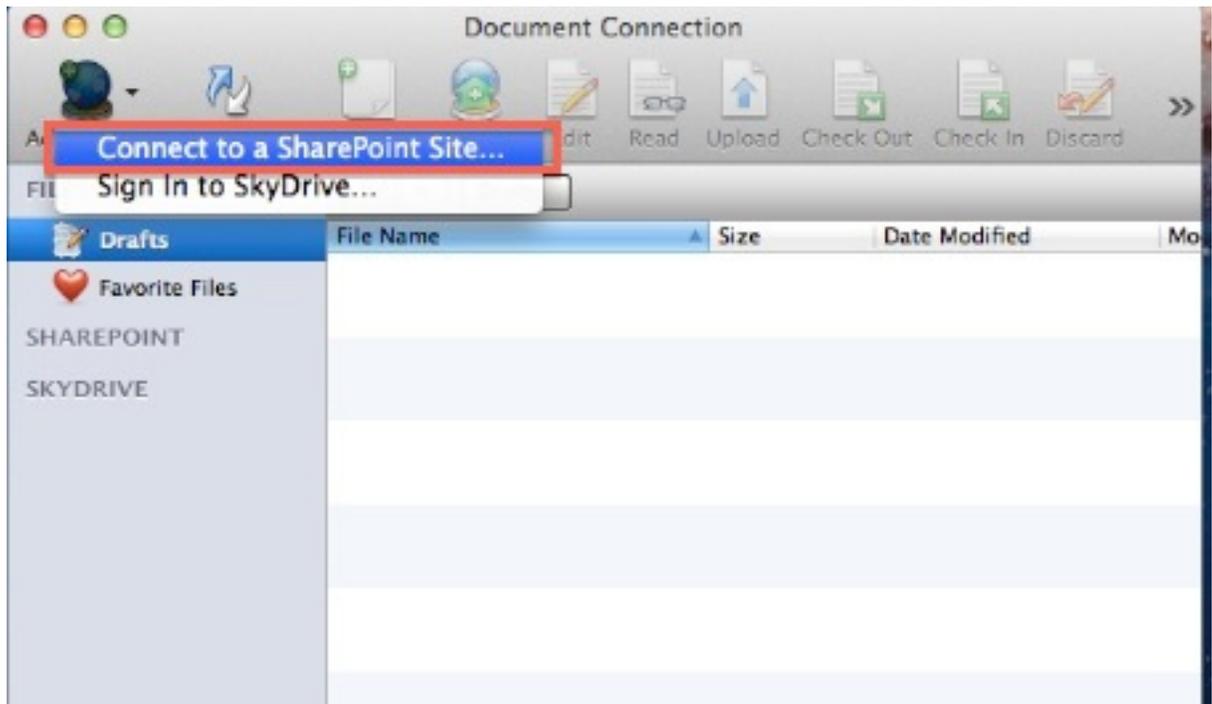


Configuring Document Connection

1. When the Document Connection window comes up, click on the **Add Location** button.

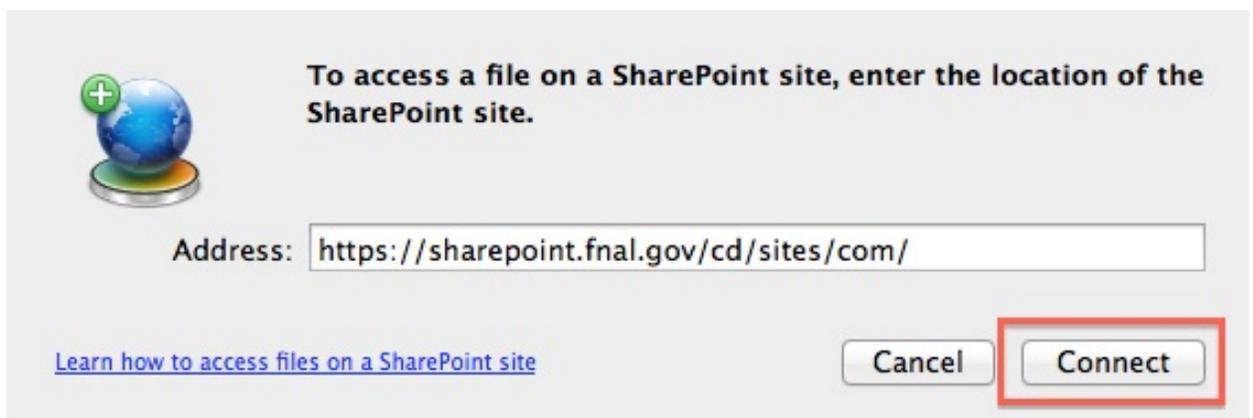


2. Select **Connect to a SharePoint Site**.

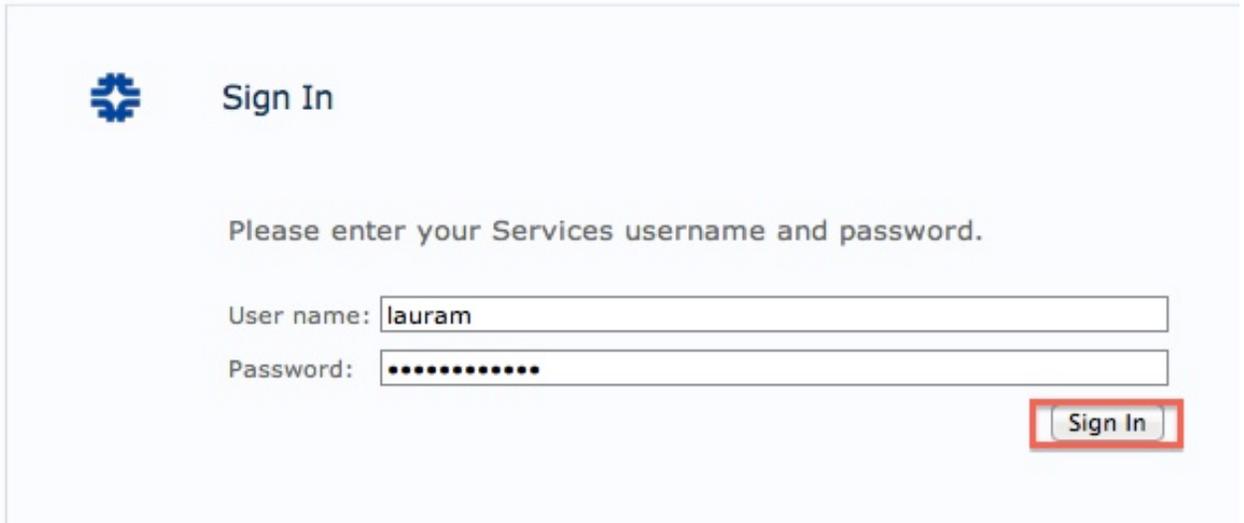


3. Put the desired SharePoint URL in the **Address** field and click on **Connect**. If you put in the URL for your site collection, you can browse as needed to any contained libraries.

(If your version shows an **Authentication** menu, you can select **Username and Password** and enter in your Services username and password and check the checkbox for **Save Password in My MacOS Keychain** if desired.)



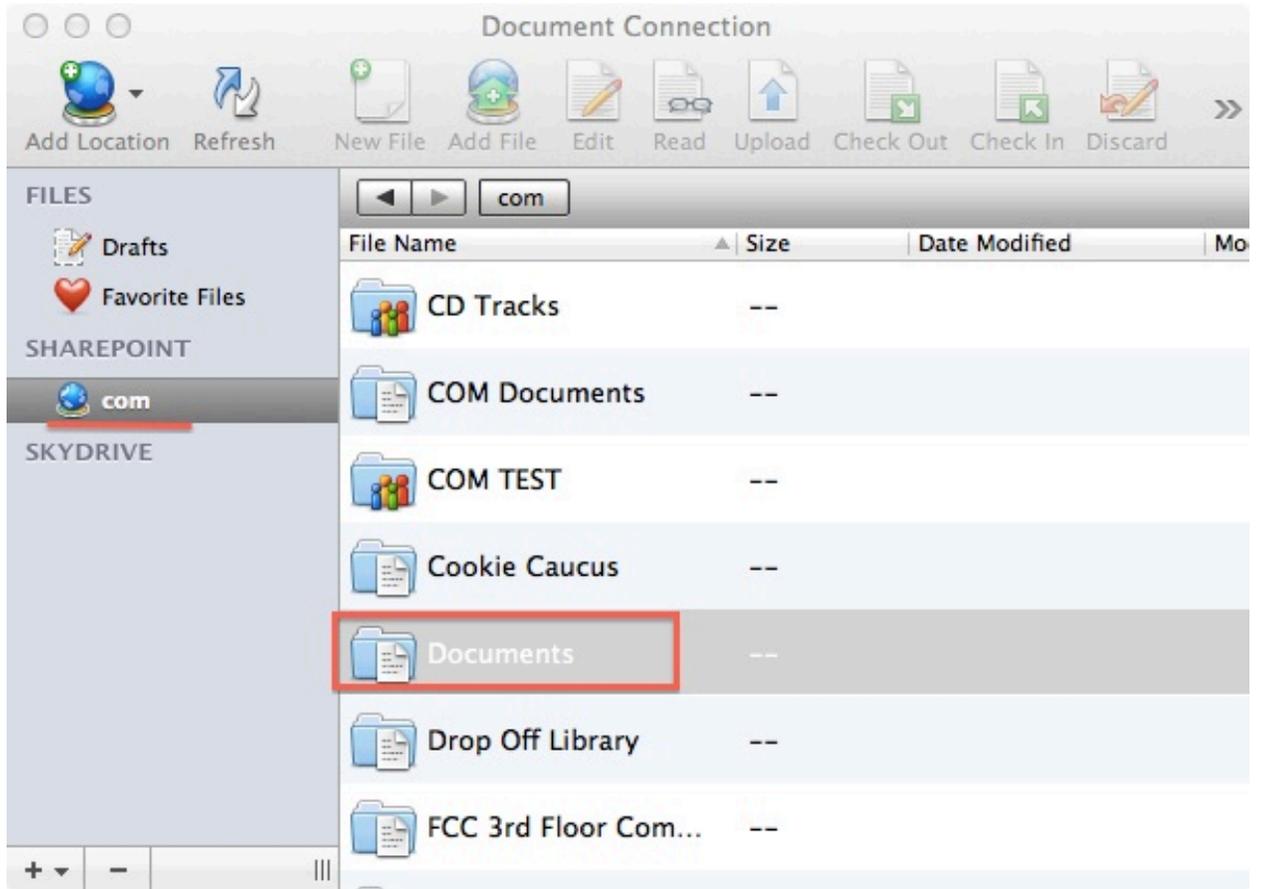
4. Enter your Services username and password and click **Sign In** if a password dialog box comes up.



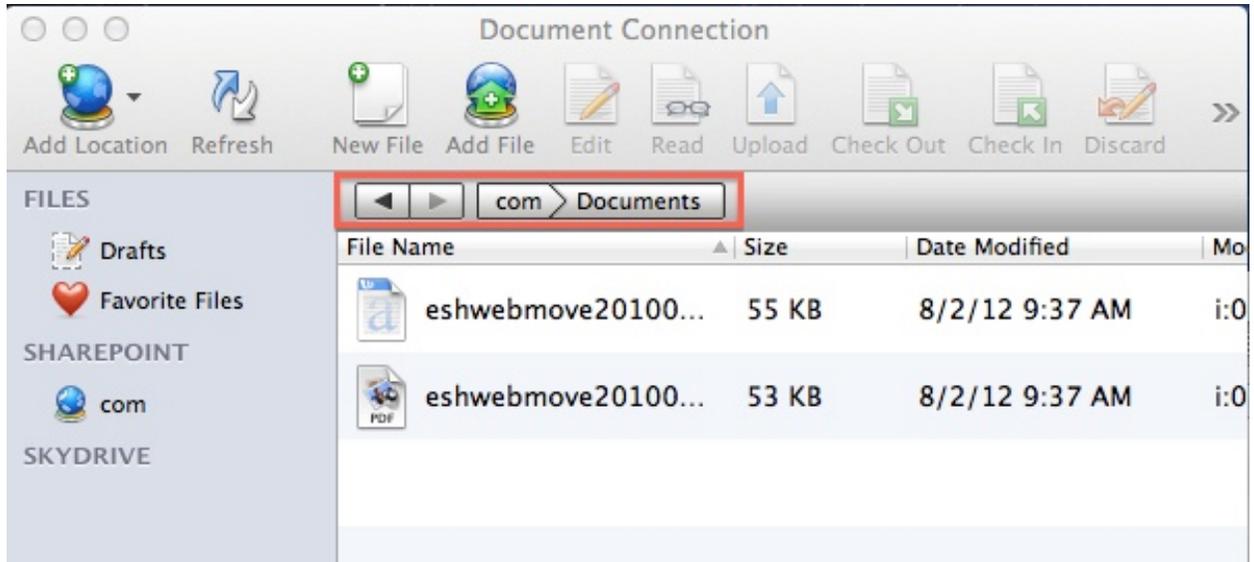
The image shows a SharePoint 'Sign In' dialog box. It features a blue gear icon on the left. The title 'Sign In' is positioned to the right of the icon. Below the title, there is a prompt: 'Please enter your Services username and password.' This is followed by two input fields: 'User name:' containing the text 'lauram' and 'Password:' containing ten black dots. A 'Sign In' button is located at the bottom right of the dialog box and is highlighted with a red rectangular border.

Using Document Connection

A Document Connection window listing of your SharePoint site will come up once you have connected and signed in. Your Document Connection window can now be used to access SharePoint as if it were a folder on your Mac. You can browse to the needed location and drag-and-drop multiple files (but not folders) to upload and download files between your Mac and SharePoint. Also, the location you added should show up under the list of SharePoint locations so you can just click on that the next time you want to connect to that same location.



You can use the breadcrumbs (directory hierarchy listing) and right and left arrows to navigate and go forward and back in the Document Connection SharePoint listing window.



For more information about using Document Connection, see:

<http://www.mactech.com/articles/mactech/Vol.25/25.07/NewToolsforCollaboration-IntroDocumentConnection/>

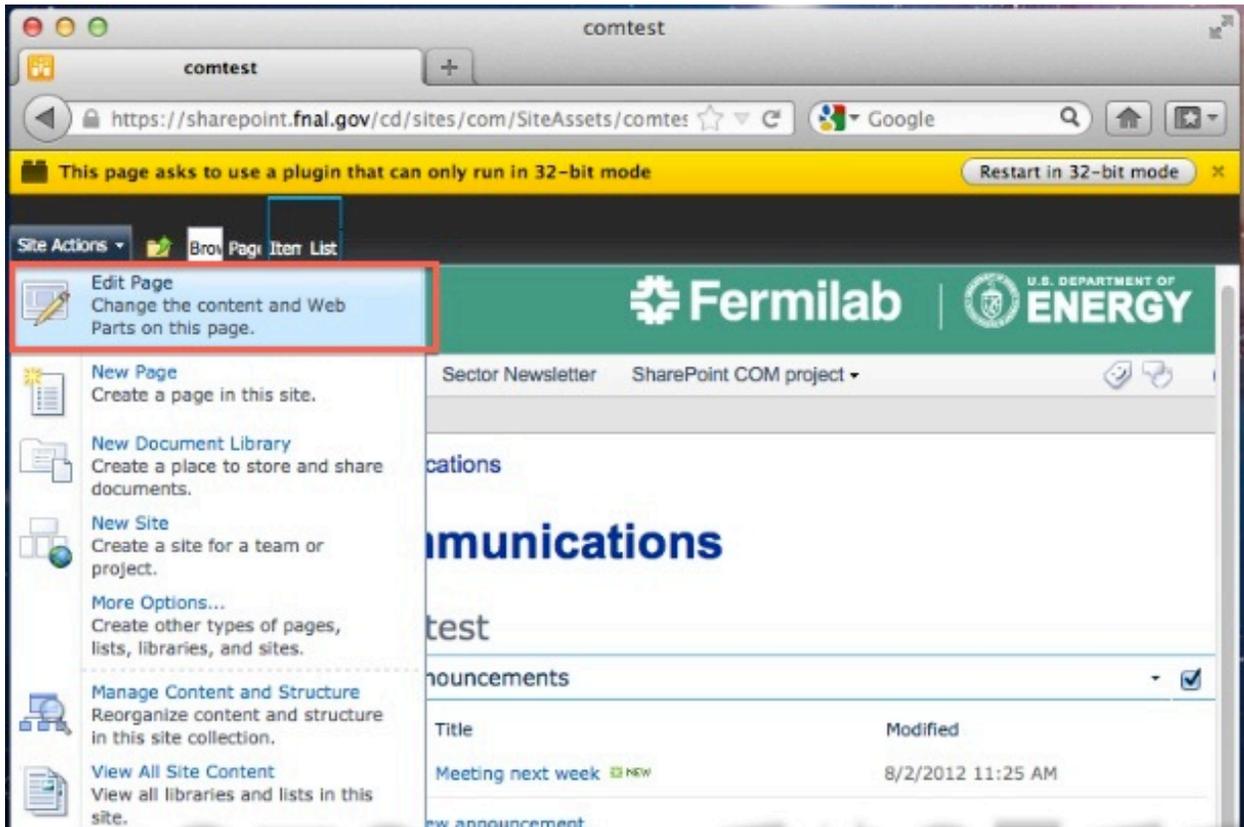
Moving Web Parts in a Web Part Page

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 using the following instructions.

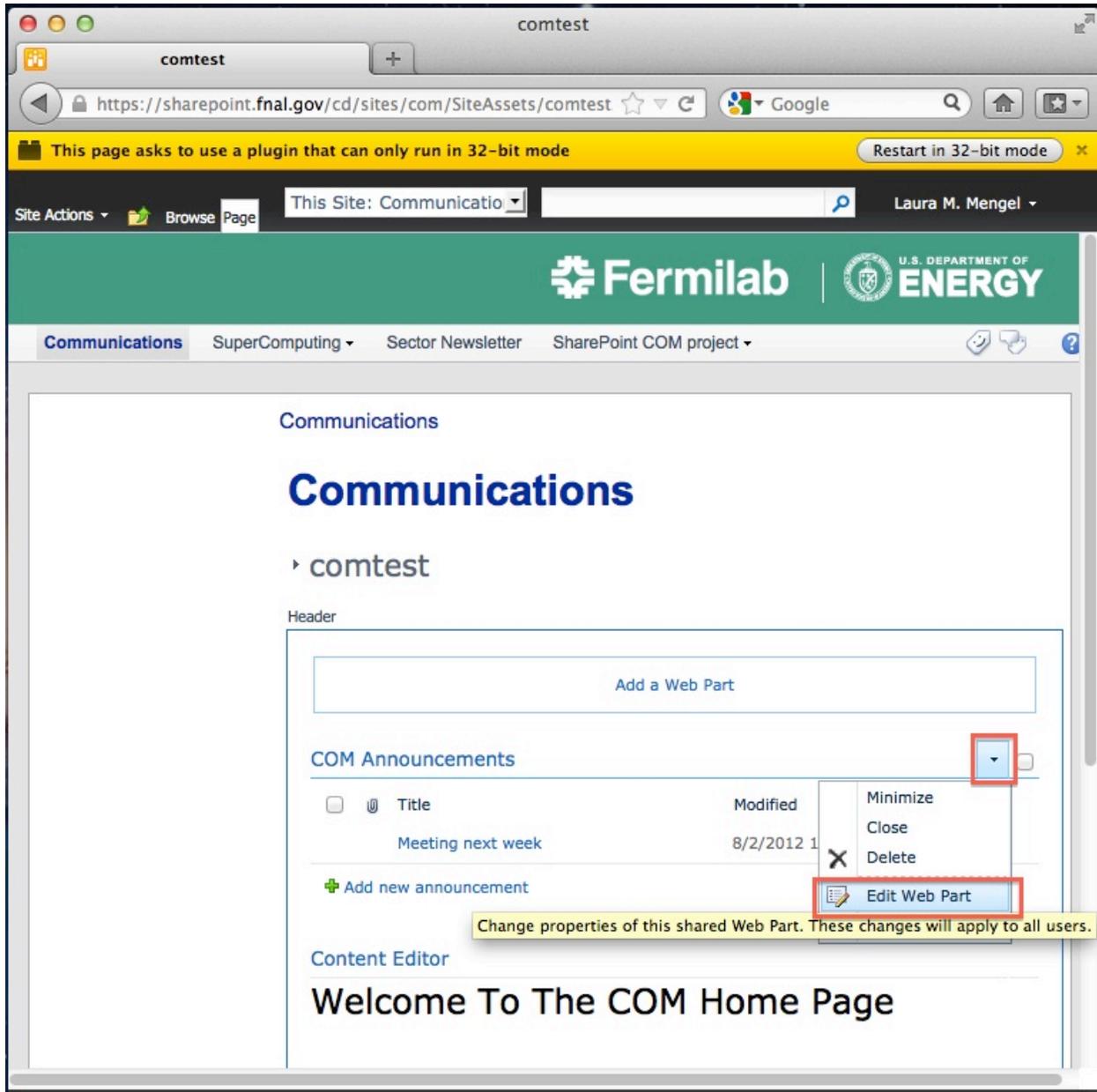
1. Navigate to the web part page you wish to edit. Notice in this example page that the Announcements web part is above the Welcome text. In this example, we will go through the steps to put it below the Welcome text.

The screenshot shows a web browser window with the URL <https://sharepoint.fnal.gov/cd/sites/com/SiteAssets/comtes>. The page features a green header with the Fermilab logo and the U.S. Department of Energy logo. Below the header, there is a navigation bar with the following items: Communications, SuperComputing, Sector Newsletter, and SharePoint COM project. The main content area is titled "Communications" and contains a sub-section for "comtest". Under "comtest", there is a "COM Announcements" list. The list has a table with the following columns: Title and Modified. The table contains one entry: "Meeting next week" with a "NEW" badge and a modified date of "8/2/2012 11:25 AM". Below the table is a link to "Add new announcement". Below the announcements, there is a "Content Editor" section with the text "Welcome To The COM Home Page". At the bottom of the page, there is a footer with the text: "Fermi National Accelerator Laboratory | Office of Science / U.S. Department of Energy | Managed by Fermi Research Alliance, LLC | Security, Privacy, Legal".

- From the **Site Actions** menu, select **Edit Page**.



3. On the web part you want to move, hover over its' title (such as "Com Announcement") and a triangle menu icon will appear on the right hand side. Click on the triangle and select Edit Web Part from the menu.



4. A Web Part Editor will appear in the right column. Click on the + sign to the left of the **Layout** section to expand the layout section.

Communications

› comtest

Header

Add a Web Part

COM Announcements ▼

<input type="checkbox"/>		Title	Modified
		Meeting next week <small>NEW</small>	8/2/2012 11:25 AM

[+ Add new announcement](#)

Content Editor

Welcome To The COM Home Page

COM Announcements ×

List Views

You can edit the current view or select another view.

Selected View

<Current view> ▼

[Edit the current view](#)

Toolbar Type

Summary Toolbar ▼

+ Appearance

+ Layout

+ Advanced

+ AJAX Options

+ Miscellaneous

OK Cancel Apply

5. The **Layout** section will expand to show all the layout options.

The image shows a SharePoint site layout with a 'Header' section containing a 'COM Announcements' list and a 'Content Editor' with the text 'Welcome To The COM Home Page'. Below the header are three columns labeled 'Left Column', 'Middle Column', and 'Right Column', each with an 'Add a Web Part' button. To the right is a 'List Views' settings panel with various options.

Header

Add a Web Part

COM Announcements

<input type="checkbox"/>		Title	Modified
		Meeting next week	8/2/2012 11:25 AM

+ Add new announcement

Content Editor

Welcome To The COM Home Page

Left Column **Middle Column** **Right Column**

Add a Web Part Add a Web Part Add a Web Part

Footer

List Views

You can edit the current view or select another view.

Selected View
<Current view>

Edit the current view

Toolbar Type
Summary Toolbar

+ Appearance

- Layout

Hidden

Direction
None

Zone
Header

Zone Index
1

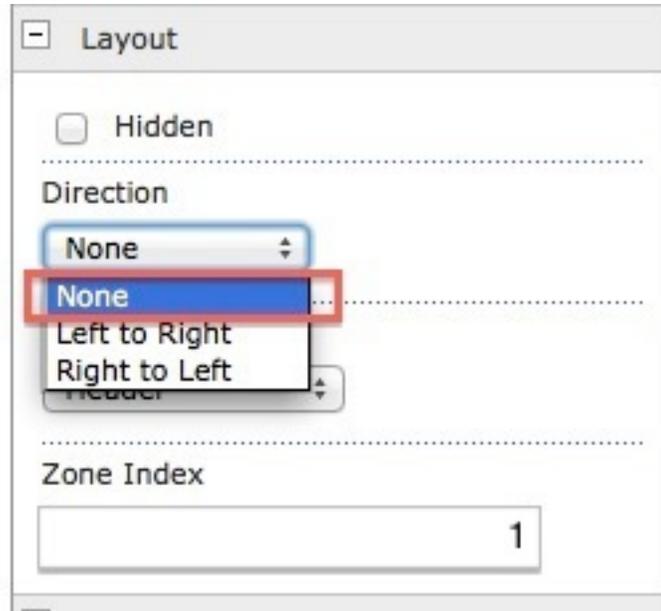
+ Advanced

+ AJAX Options

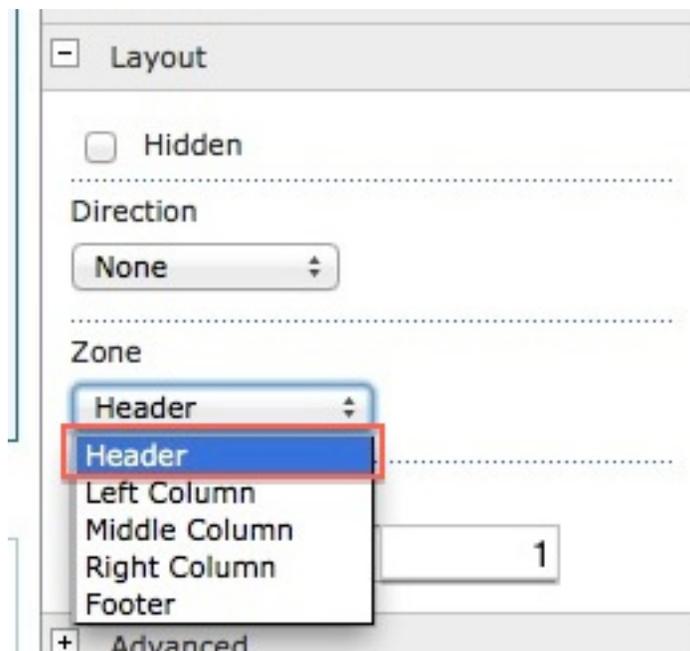
+ Miscellaneous

OK Cancel Apply

6. Select **None** from the Direction menu if it is not already selected. (Or you can choose to lay items out **Left to Right** or **Right to Left** if you have a number of web parts in a row).



7. Select the correct **Zone** where you want the web part to be moved. In this case, we are keeping the Announcements web part in the same **Header** Zone, but just changing its' position in that zone to move it lower. The zones are the container areas for web parts in the page such as header, footer, and different columns on the page. Your page may be laid out differently.



- Next change the **Zone Index** (relative order) of the web part to the desired location and then click **Apply**. In this case, the Zone Index was 1 and we want to move it after the Content Editor “Welcome” part that had a Zone Index of 2, so we want to change the Announcements web part Zone Index to 3 so the Announcements will be moved under the Welcome (as it is below).

The screenshot displays the SharePoint web part configuration interface. On the left, a preview of the 'Header' zone shows a 'Content Editor' with the text 'Welcome To The COM Home Page' and a 'COM Announcements' web part below it. The 'COM Announcements' web part is currently selected and shows a table with one announcement: 'Meeting next week' on '8/2/2012 11:25 AM'. Below the table is a '+ Add new announcement' button. The 'Left Column', 'Middle Column', and 'Right Column' zones each contain an 'Add a Web Part' button. The 'Footer' zone is empty.

On the right, the configuration pane for the 'COM Announcements' web part is shown. The 'List Views' section includes a 'Selected View' dropdown set to '<Current view>' and a 'Toolbar Type' dropdown set to 'Summary Toolbar'. The 'Appearance' section is expanded, showing 'Hidden' (unchecked), 'Direction' (None), and 'Zone' (Header). The 'Zone Index' field is highlighted with a red box and contains the value '3'. The 'Advanced', 'AJAX Options', and 'Miscellaneous' sections are collapsed. At the bottom, the 'Apply' button is highlighted with a red box.

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. Another advantage is that SharePoint will fix links within the site collection for the moved content.

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.)
5. The move may not work if you are moving items from a source list that includes a web parts list or a connection to another list.

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 items.

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".)

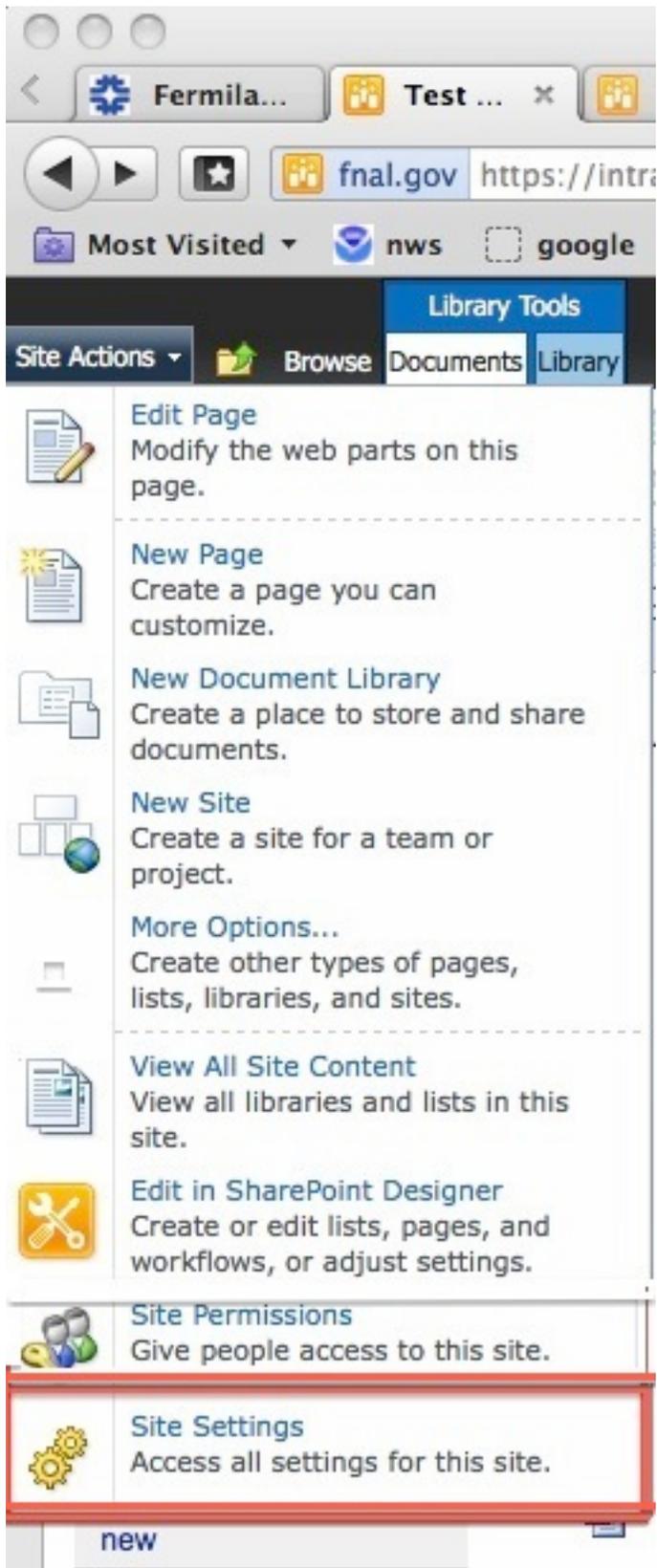
Versioning: If the source location has versioning enabled, then versioning will need to be enabled on the destination before moving content over.

Columns: If the destination list does not have the same columns as the source list, then columns may need to be added or removed before you can move the items.

2. Items that are checked out cannot be moved.
3. **Quota:** You will not be able to move items if the required space exceeds your quota. Also, even if you have enough quota, keep in mind that performance decreases if you have thousands of documents or list items in the same library or list.
4. If you have not selected any items, "Move" will be grayed out. (You need to select the items first.)

Follow the instructions below to move documents and list items in your site collection.

1. From the **Site Actions** menu, choose **Site Settings**.



2. From the **Site Settings** list, click on Content and **Structure**.

COM group sandbox ▸ Site Settings



Users and Permissions

- People and groups
- Site permissions



Galleries

- Site columns
- Site content types
- Web parts
- List templates
- Master pages
- Themes
- Solutions



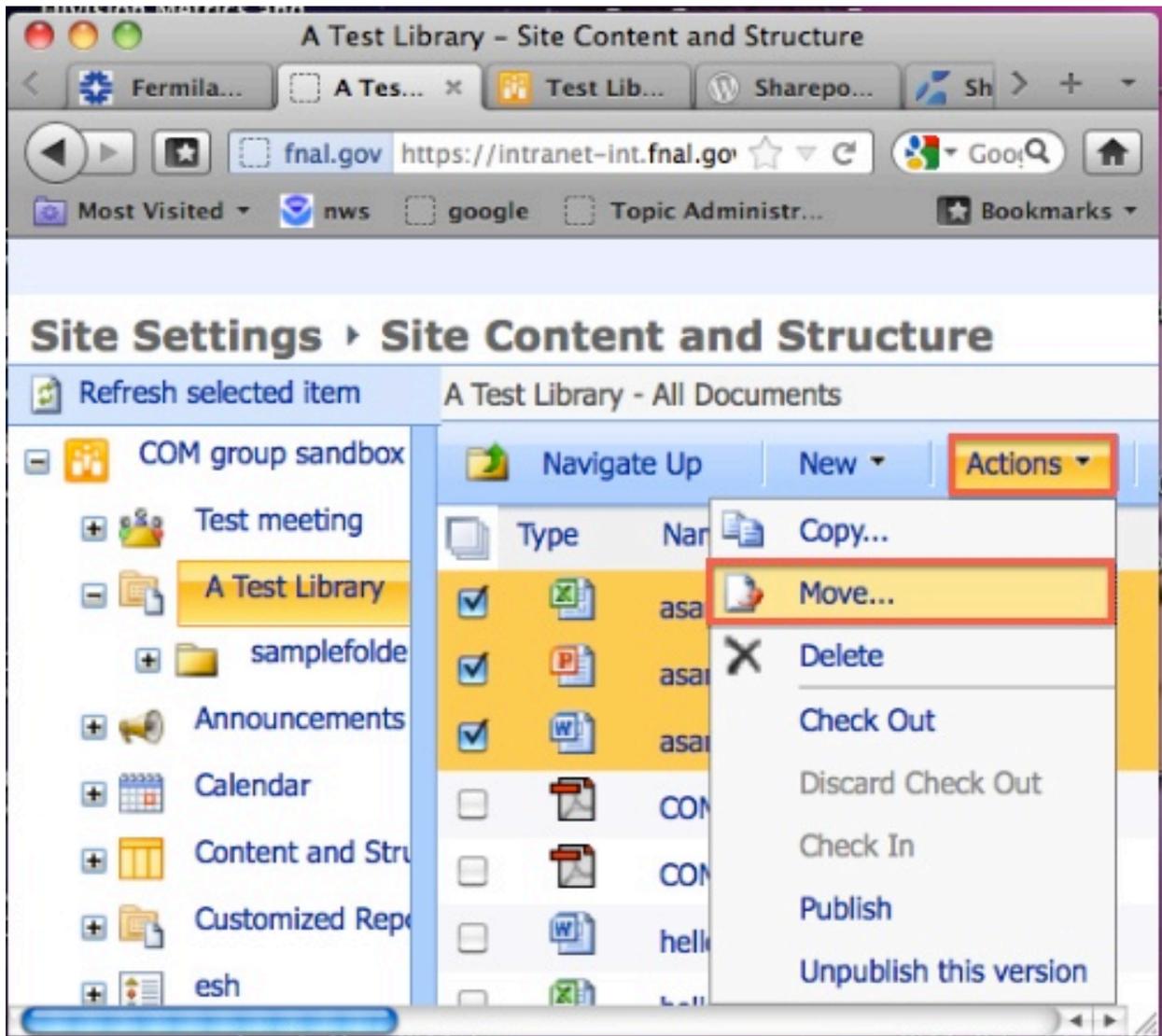
Site Administration

- Regional settings
- Site libraries and lists
- User alerts
- RSS
- Search and offline availability
- Sites and workspaces
- Workflow settings
- Related Links scope settings
- Term store management
- Content and structure**
- Searchable columns

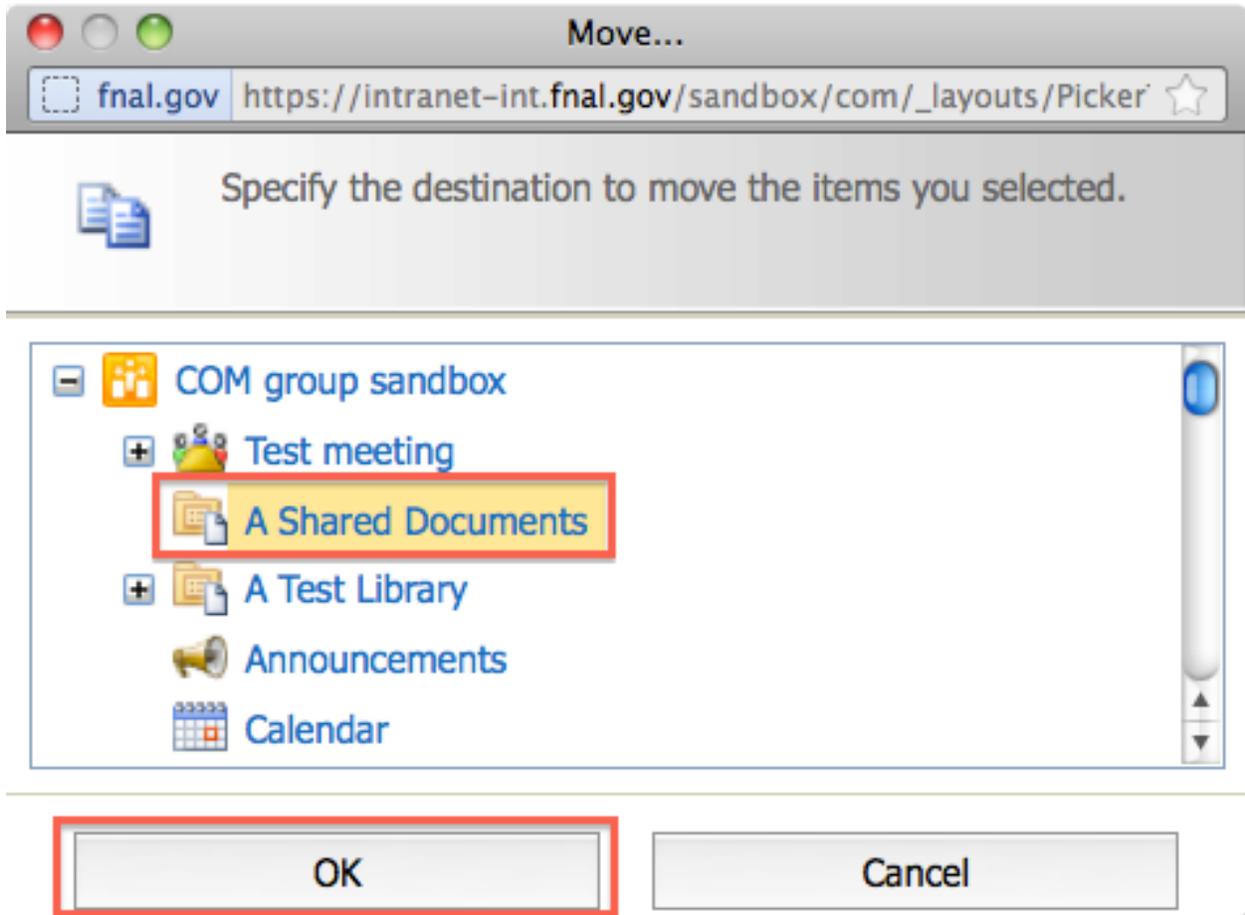
3. Navigate to the desired site and library or list in the left column. Check the boxes of the items you want to move in the right column.



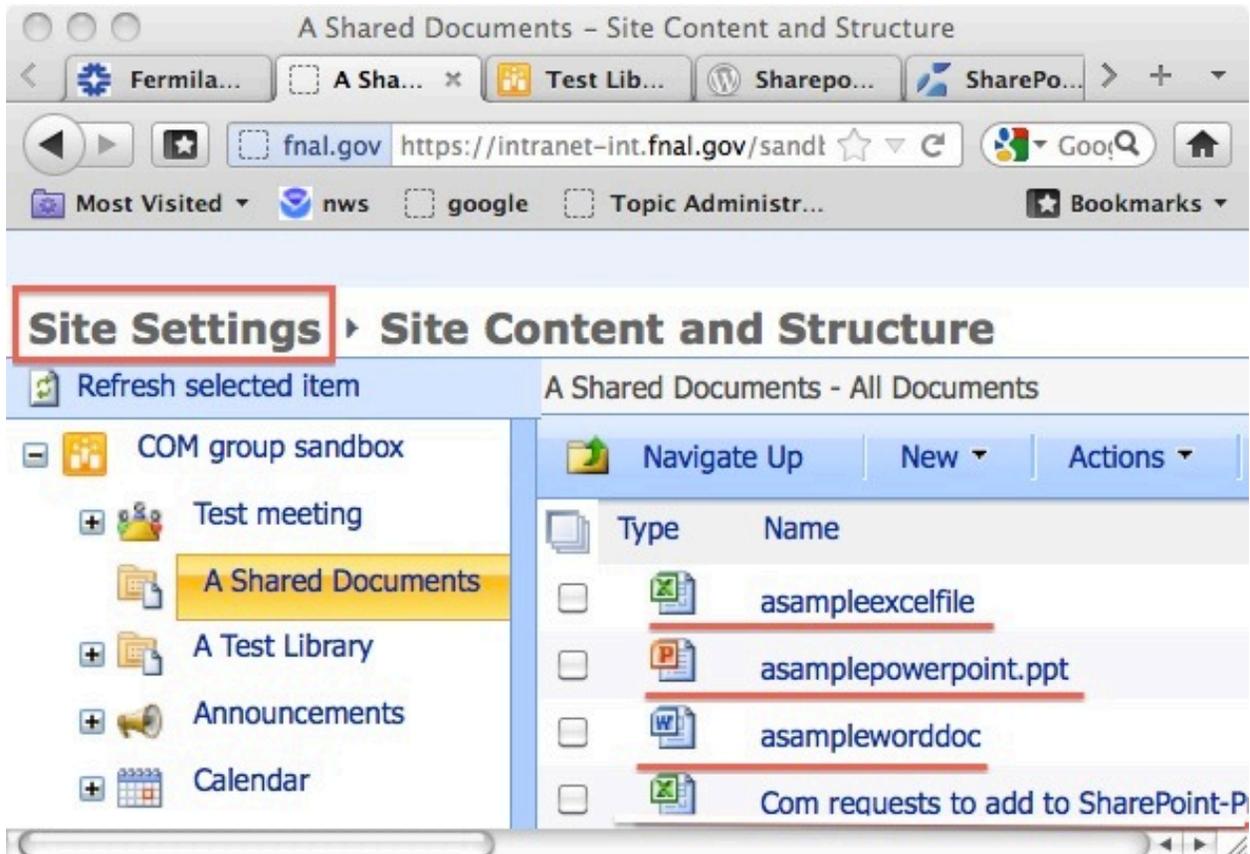
4. From the **Actions** menu, select **Move**.



5. In the **Move** dialog box that pops up, select the desired destination library or list for the items you are moving and then click on **OK**.



- Your window should not show your destination list or library with the items you have added. Use the **Site Settings** navigation link to get back to your Site Settings page and then back to your site from there.



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. (SharePoint Designer is needed for this.)

Use the instructions below to move a whole list or library from one SharePoint location to another.

The Microsoft procedure to copy or move a list by using a list template is at

<http://office.microsoft.com/en-us/office365-SharePoint-online-enterprise-help/copy-or-move-a-list-by-using-a-list-template-HA101969181.aspx>

This procedure includes steps to:

1. Create a list template.
2. Edit the list template properties.
3. Copy or move a list within a site collection.
4. Delete a list template

A similar procedure is available for moving a whole library at:

<http://office.microsoft.com/en-us/office365-SharePoint-online-enterprise-help/copy-or-move-a-library-by-using-a-library-template-HA101969179.aspx>

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) Internet Explorer. You can use virtualization to use your Mac to access SharePoint from Windows with Internet Explorer to do these functions. Please refer to [Using SharePoint from a Mac: Terminal Server Instructions](#) for instructions for using the terminal server to access Windows and Internet Explorer for SharePoint tasks that cannot be done on the Mac.

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 Windows 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 (changing the form's contents or view based on the user's role)
- 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=zWYLIp3zfvAC>

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. Please refer to [Using SharePoint from a Mac: Terminal Server Instructions](#) for instructions for using the terminal server to access Windows and Internet Explorer for SharePoint tasks that cannot be done on the Mac.

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 OS X releases at no extra charge. However, you still need to buy a Windows and possibly an Office License.

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&lcid=1033&SYSLCID=1033&UILCID=1033&Version=14>
- Using SharePoint from a Mac: Terminal Server Instructions
<http://cd-docdb.fnal.gov/cgi-bin/ShowDocument?docid=4850>