Site Owner User manual

Fermipoint

This user manual covers the core procedures those with owner permissions can perform in Fermipoint- a Fermilab-based content management solution that utilizes the SharePoint 2013 platform. The procedures found in this manual come from Microsoft help documentation and are customized, where applicable, for the Fermipoint environment.

4/7/2014

Contents

1.0 Understanding Permissions 2
1.1 Owner Role 2
1.2 Grant permissions to a user or group 3
1.3 Remove users from a group 7
1.4 Break permission inheritance 9
1.5 Delete unique permissions and restore inheritance 9
1.6 Create a group 10
1.7 Delete a group 11
1.8 Assign a new permission level to a group 11
2.0 Overview of apps 12
2.1 Add apps to sites 12
3.0 Site Settings 13
3.1 View site content 13
3.2 Request a site 14
3.3 Add a subsite 14
3.4 Delete a subsite 15
3.5 Save a site as a template 16
3.6 Create a site from a template 17
3.7 Creating a Project site 18
3.8 Restoring items from the Recycle bin 19
3.9 Add a Content Type 21
3.10 Associate a Word, Excel, or PowerPoint template with a content type 22
3.11 Configure a content type to always display the Document Information Panel 22
4.0 Managing Site Navigation 23
4.1 Top Link Bar 23
4.2 Quick Launch 25
4.3 Tree View 27
4.4 Metadata navigation ..... **Error! Bookmark not defined.**
4.5 Managed navigation ..... **Error! Bookmark not defined.**

1.0 Understanding Permissions

1.1 Owner Role

Owners have the highest permission level and are primarily responsible for managing the security settings for their site. This responsibility includes granting or restricting access to a site, adding additional sub sites, and managing security settings for all site content and assigning any unique permissions that may be required. Content that owners can manage permissions for includes:

Sites | Lists | Libraries | Folders | Items | Documents | Pages

Owners can grant permission to a site, library, folder etc. by assigning permission levels to an **Individual, Group** or **Active Directory Group**.

The following table shows the default permissions groups and their assigned permission levels.

GROUP NAME	PERMISSION LEVEL)	USE THIS GROUP FOR PEOPLE WHO
Approvers	Approve	Approve documents, pages, and list items.
Owners	Full Control	Manage site permissions, settings, and appearance.
Members	Contribute or Edit	Edit site content.
Visitors	Read	View site content, but not edit it.
Designers	Design	View, add, update, delete, approve, and customize the site.
Hierarchy Managers	Manage Hierarchy	Create sites and edit pages, list items, and documents.
Restricted Readers	Restricted Read	View pages and documents but not versions or permissions.
Style Resource Readers	Restricted Read	Need only Limited Access to the Style Library and Master Page Gallery.
Viewers	View Only	Need to see content but not edit or download it.
Quick Deploy Users	Contribute	Schedule Quick Deploy jobs.

NOTE: To learn more about permissions, please see the following articles:

Edit permissions for a list, library, or individual item:

http://office.microsoft.com/en-us/sharepoint-server-help/edit-permissions-for-a-list-library-or-individual-item-HA102833689.aspx?CTT=5&origin=HA102771919

Introduction: Control user access with permissions:

http://office.microsoft.com/en-us/sharepoint-server-help/introduction-control-user-access-with-permissions-HA102771919.aspx?CTT=1

Default SharePoint groups …:

http://office.microsoft.com/en-us/sharepoint-server-help/default-sharepoint-groups-in-sharepoint-server-HA102772365.aspx?CTT=5&origin=HA102833689

Manage membership of SharePoint groups.

http://office.microsoft.com/en-us/sharepoint-server-help/create-and-manage-sharepoint-groups-HA102772372.aspx?CTT=5&origin=HA102833689

Understanding permissions in SharePoint

http://office.microsoft.com/en-us/sharepoint-server-help/video-understanding-permissions-in-sharepoint-VA104058166.aspx?CTT=5&origin=HA102772778

Plan your permissions strategy:

http://office.microsoft.com/en-us/sharepoint-server-help/plan-your-permissions-strategy-HA102772371.aspx?CTT=1

1.2 Grant permissions to a user or group

Owners can add users to a permissions group at any time.

Active Directory Groups

In some cases, you might want to add an Active Directory group to grant access to a library or list for all the people in that group. Any groups established in the Active Directory can also be added to a permissions group.

For example, an owner can add the domainusers group, an Active Directory group at Fermilab that contains all users at the lab that have a Services account, to the Visitors group for their site. All members of the domainusers group would then inherit permissions from the Visitors group that they were added to.

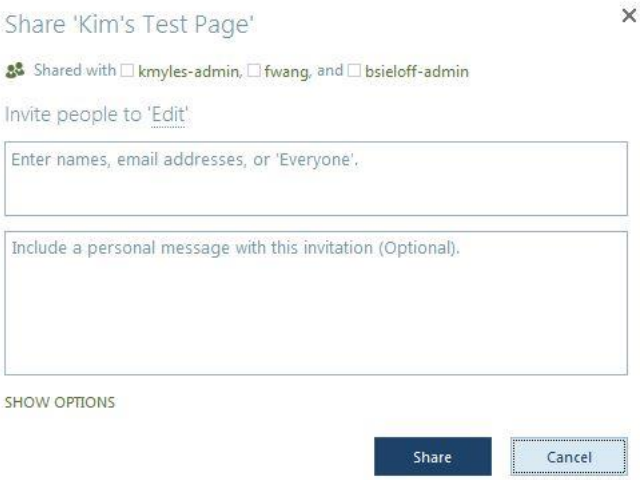
NOTE: You can submit a Service Desk request if you would like to set up an AD group for a department or organization at Fermilab. This AD group will not require maintenance, since it is updated automatically from human resources systems. If roles change or new users are added to the group, these updates should be automatic.

Grant permission to a site

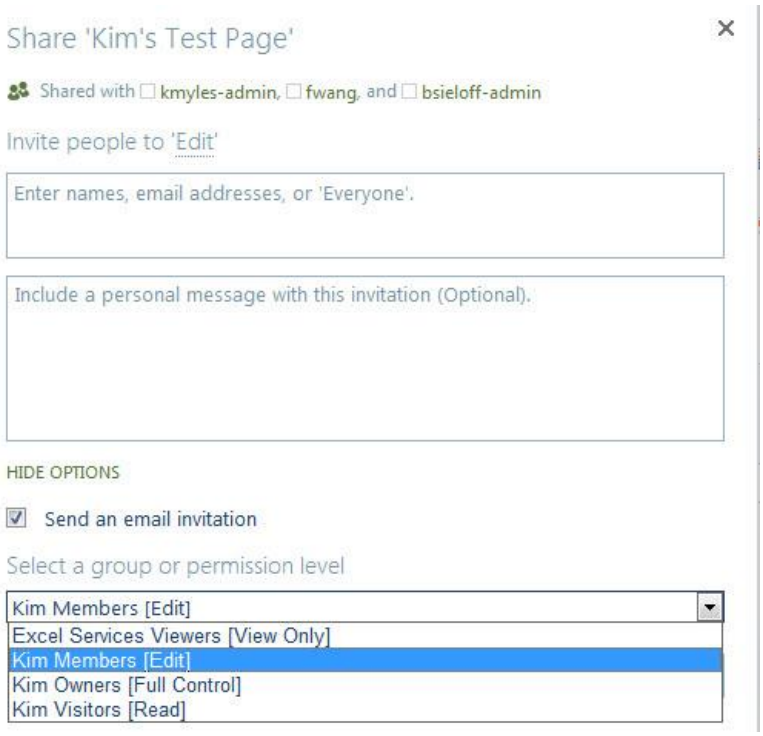
Most sites have one or more site owners that can change the permissions settings for the sites that they own. As a site owner, you can grant access to your site by managing permissions. Following is the procedure to grant contribute access to your site.

1. On your website or team site, click **Share.**

By default, the **Share** dialog that appears displays the message **Invite people to Edit**. This invites the users that you add to join the Members group.



2. To choose a different group and permission level, click **Show options** and then choose a different SharePoint group or permission level under **Select a group or permission level**.



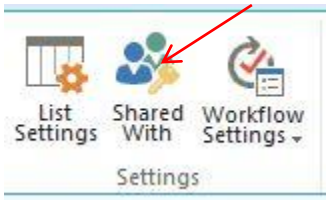
3. In the Enter names, email addresses, or Everyone box, enter the name or email address of the user or group that you want to add. When the name appears in a confirmation box below your entry, select the name to add to the text box.
4. If you want to add more names, repeat these steps.
5. (Optional) Enter a personalized message to send to the new users in *Include a personal message with this invitation...*
6. Click **Share**.

Procedure to grant permissions to a list (or library):

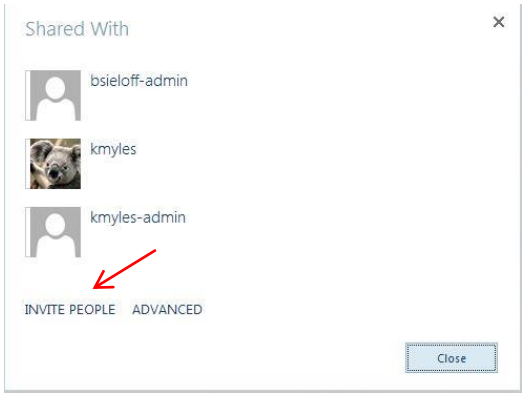
In some cases, your site might contain content only meant for certain users or groups. For example, you might create a new library for a special project, and want to ensure that only people who work on that project can access the library.

To restrict access, you have to first break permissions inheritance, and then change the permissions for the list or library on a uniquely defined permissions page. Navigate to the list you want to grant a user access to.

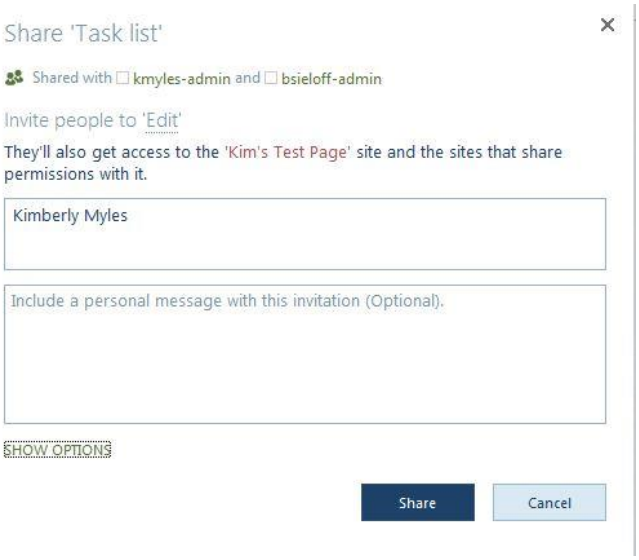
1. Choose the **List** tab.
2. From the ribbon, select **Shared With**.



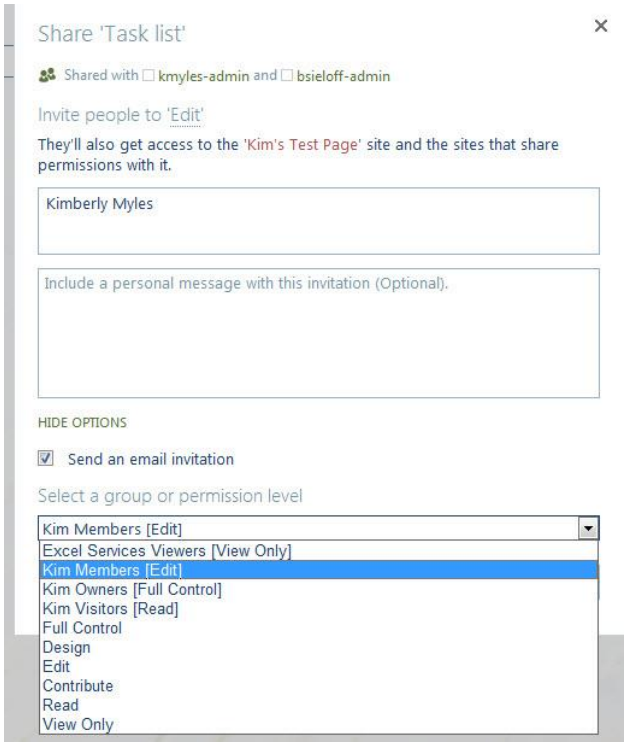
3. On the Shared With window, click **Invite People**.



4. In the Share '*List Name*' dialog box, enter the names of the people or groups that you want to give access to.
    - You can check **Send an email invitation** to include a personal message.
    - You can specify the permission level that you want the new users to have.



5. After you add names, if you want to specify a permission level, click **Show Options**.
6. Select the permission level you want to use from the Select a group or permission level dropdown menu.



7. Click **Share** to save your settings and send your invite.

1.3 Remove users from a group

To restrict access to a list, remove the users or groups from the group that has permission to access the list.

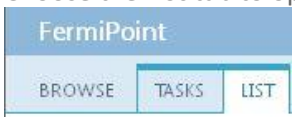
To remove users from a group for a site:

1. From the website or team site you want to restrict access to, select the gear icon and choose **Site Settings.**
2. On the Site Settings page, under Users and Permissions, click **People and Groups**.
3. On the **People and Groups** page, in the Quick Launch, click the name of the group that you want to remove users from.
4. Select the check boxes next to the users who you want to remove, click **Actions**, and click **Remove Users from Group**.

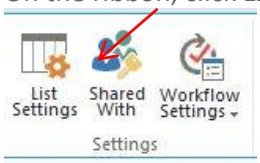
   The user is removed.

To remove users from a group for a list:

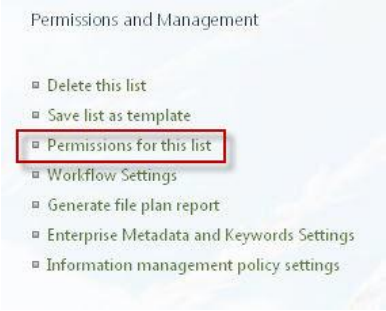
1. Open the list that you want to restrict access to.
2. Choose the **List** tab to open the list ribbon.



3. On the ribbon, click **List Settings**.

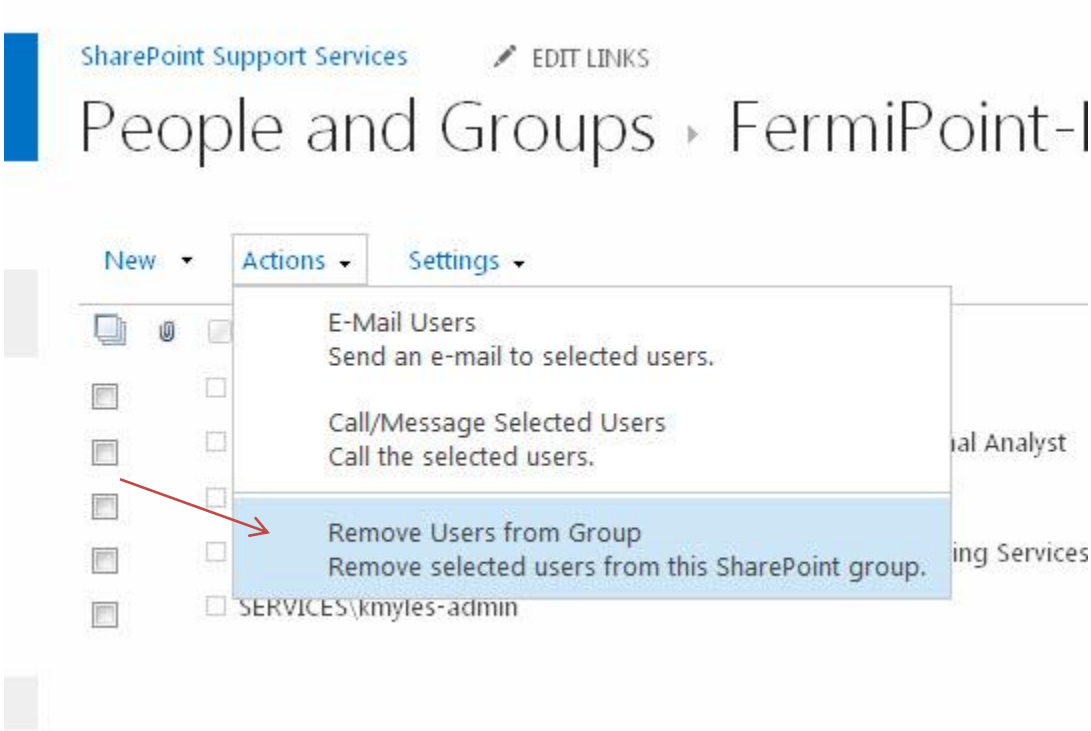


4. On the Settings page, under the Permissions and Management area, click **Permissions for this list**.



5. Click on the name of the group you want to remove a user from.

6. From the page displaying the membership of that group, click **Actions**, and then click **Remove Users from Group** to remove them.



The permissions page updates to show that the group or user no longer has permissions to the list.

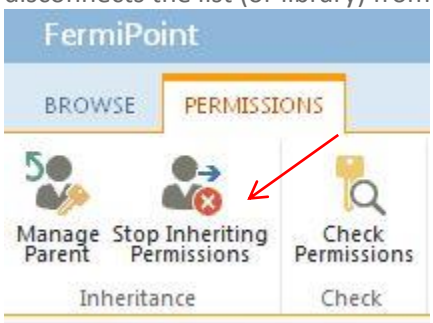
1.4 Break permission inheritance

If you break permissions inheritance for a list or library and then define new permission settings, the list (or library) becomes a parent for items in it. The items inherit the new permission settings (unless the items have uniquely defined permissions.)

TIP: If you plan to break inheritance on your site, organize your content to limit the number of locations that have uniquely defined permissions. Consider organizing your content by security level, from less sensitive to most sensitive. You might place documents that are more sensitive on a separate sub site or in a single library. This organizational structure is easier to maintain than managing many documents that are located across many sites or libraries, each with unique permissions.

To break inheritance for a list or library and restrict access to it, follow these steps.

1. Navigate to the site that contains the list and open it.
2. Choose the **List** tab to open the list ribbon.
3. Click **List Settings**.
4. On the **Settings** page, under **Permissions and Management**, click **Permissions for this list** to open the permissions page for the list. The permission page displays a status bar across the top that indicates the list inherits permissions from its parent site, and then gives the name of the parent.
5. To break permissions inheritance from the parent, click **Stop Inheriting Permissions**. This disconnects the list (or library) from the parent site.



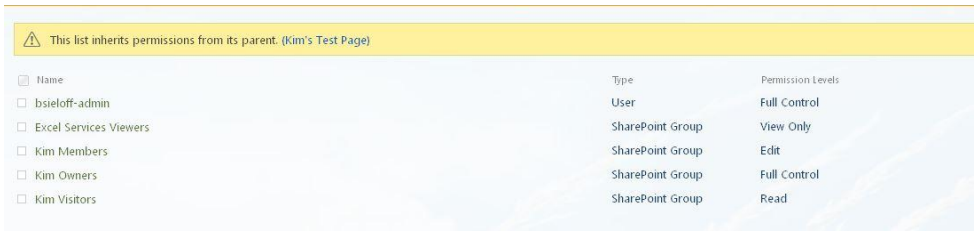
1.5 Delete unique permissions and restore inheritance

When you break permissions inheritance between a site, folder, list, library, list item, or document and its parent site, you can restore inheritance at any time:

1. Open the list that you want to restore permissions inheritance for.
2. On the List tab, click **List Settings**. (In a document library, click the **Library** tab, and then click Library Settings.)
3. On the Settings page, under Permissions and Management, click **Permissions for this list.** (In a document library, click Permissions for this document library.)
4. On the Permissions tab (for a list or a library), click **Delete unique permissions**.

5. From the message that appears, Click **OK**.

The status bar for the list now shows that "This list inherits permission from its parent." The name of the parent appears next to the updated status.

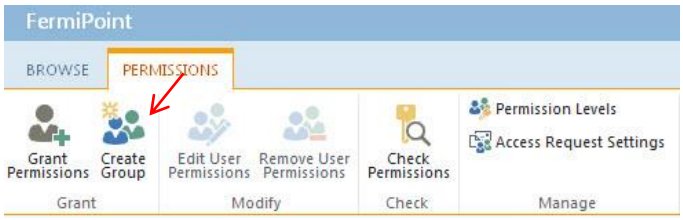


NOTE: Custom permissions are lost when you complete this action.

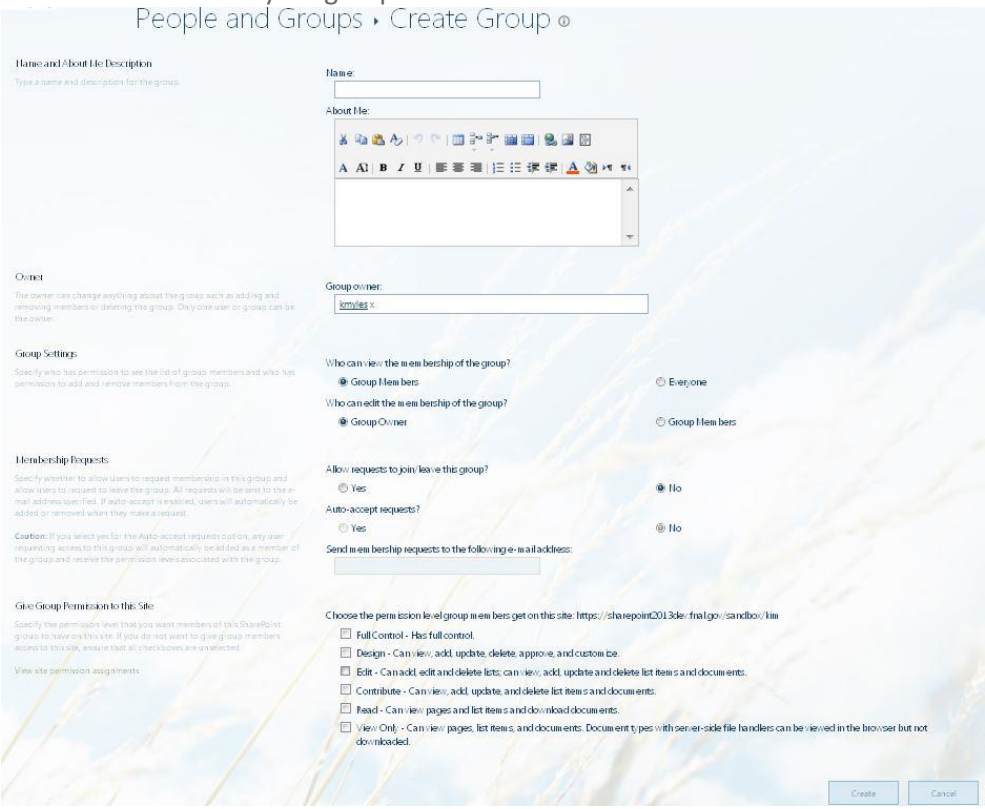
1.6 Create a group

1. Navigate to the site you want to create a group for.
2. Select the gear icon and choose **Site Settings**.
3. On the **Site Settings** page, under **Users and Permissions**, click **Site Permissions**.

4. On the **Permissions** tab, click **Create Group**.



5. On the Create Group page, in the **Name** and **About me** text boxes, type a name and description for this group.
6. In the Group owner box, specify a single owner of this security group.
7. In the Group Settings section, specify who can view and edit the membership of this group.
8. In the Membership Requests section, select the settings that you want for requests to join or leave the group. You can specify the email address to which requests should be sent.
9. In **the Give Group Permissions to this Site** section, choose a permission level for this group.
10. Click **Create** to create your group.



1.7 Delete a group

1. On your Team Site or website, click **Site Settings**.
2. On the Site Settings page, under Users and Permissions, click **People and Groups**.
3. In the Quick Launch, click the name of the SharePoint group that you want to delete.
4. Click **Group Settings**.
5. At the bottom of the **Change Group Settings** page, click **Delete**.
6. In the confirmation window, click **OK.**

1.8 Assign a new permission level to a group

If you have customized a permission level or created a new permission level, you can assign it to groups or users.

1. On your team site, click **Site Settings**.
2. On the Site Settings page, under **Users and Permissions**, click **Site Permissions**.

3. Select the check box next to the user or group that want to assign the new permission level to.
4. On the Permissions tab, click **Edit User Permissions**.
5. On the Edit Permissions page, select the check box next to the name of the new permission level.
   If you select multiple permission levels, the permission level assigned to the group is the union of the individual permissions in the different levels. That is, if one level includes permissions (A, B, C), and the other level includes permissions (C, D), the new level for the group includes permissions (A, B, C, D).

2.0 Overview of apps

Please see the following article for an up-to-date overview of apps for SharePoint 2013:
http://technet.microsoft.com/en-us/library/fp161230.aspx

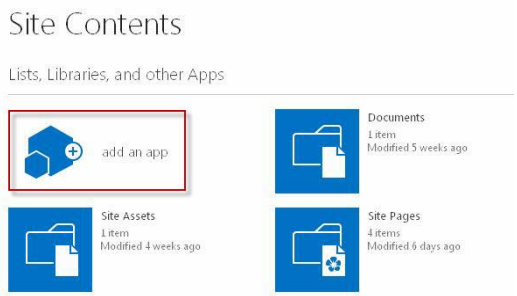
2.1 Add apps to sites

Site owners can add apps from the following sources to their sites:

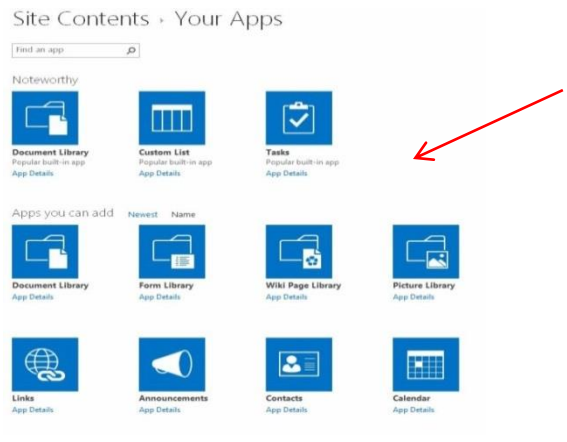
- From the list of apps already available for a site (default apps, such as standard lists and libraries, and apps that have been purchased already.)
- From the App Catalog
- From the SharePoint Store

To add an app from the list of available apps:

1. On the home page, from the quick launch menu, select **Site Contents.**
2. Click **Add an App**.



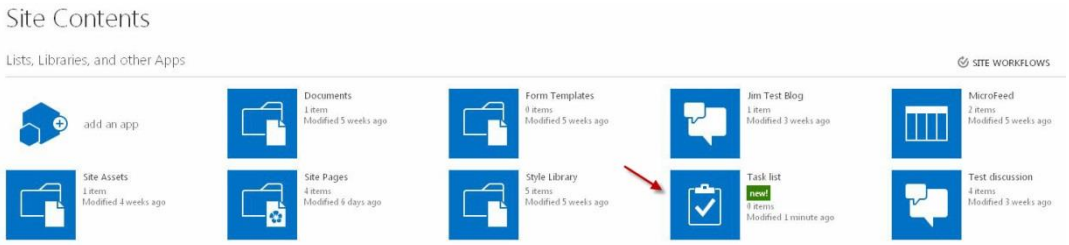
3. From the 'Your Apps' list, click the app you want to add.



NOTE: If it is a custom app, follow the instructions to 'Trust the app.'

4. From the 'Adding Tasks' dialogue box that appears, add a name for your app and click **Create**.

5. The app is added and appears in the **Apps** section of your Site Contents list.

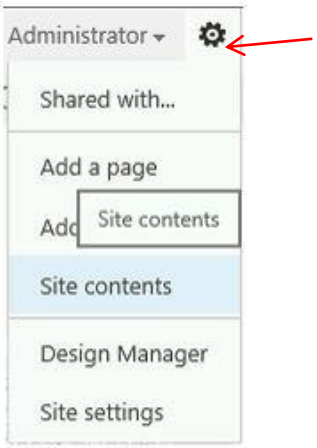


3.0 Site Settings

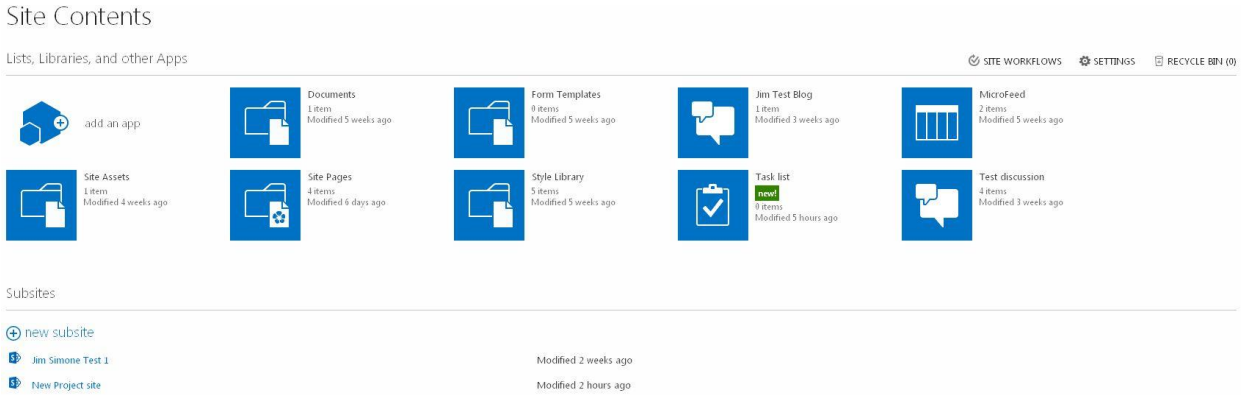
3.1 View site content

To view all of the content for your site:

1. Click on the Options button (gear icon) in the upper right corner of your site and select **Site Contents**.



2. The Site Contents page will appear. You can view site content, which is divided into two categories:
   - Lists, Libraries, and other Apps
   - Subsites



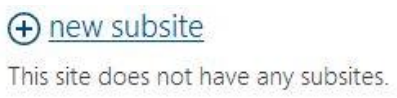
3.2 Request a site

Open a Service desk ticket to request a top-level site.

1. Login to Service-Now: https://fermi.service-now.com/
2. From the home page in the 'Request Things' area, select **Get Help with Web & Collaboration Sites**.
3. Select **SharePoint Site Request.**
4. **Fill out all required fields and click** Submit**.**

3.3 Add a subsite

1. Click on the Site Settings gear icon in the upper right corner of your site.
2. From the menu that appears, select **Site Contents**.
3. From the Site Contents page, under the 'Subsites' heading click **new subsite**.



4. When the 'New SharePoint Site' page appears, enter required information and click **Create** to create your site.

3.4 Delete a subsite

Important things to know about deleting a subsite:

- NOTE: you cannot restore a subsite from the recycle bin, if you accidentally delete a subsite that you did not wish to delete, please open a Service Desk ticket and include the day and time that the site was accidentally deleted.

To delete a subsite:

1. Navigate to the site that you want to delete.
2. Navigate to the Site Settings page. (Select the gear icon and choose **Site Settings.**)
3. From the Site Actions area, choose **Delete this site**.

4. You will receive a warning message, to continue with deletion click **Delete** and **OK**.
5. A Delete confirmation will appear, click **GO BACK TO SITE**.

3.5 Save a site as a template

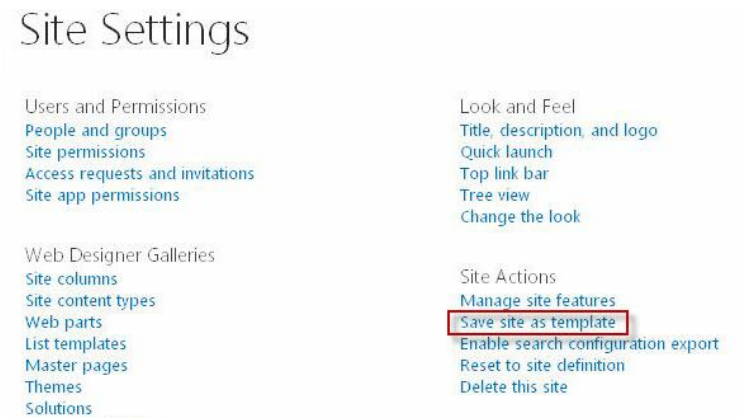
NOTE: In SharePoint 2013, by default, you cannot save a Publishing site (or a site with the Publishing feature activated) as a Site template.

The following "How to Save Publishing Site as Template in SharePoint 2013" article provides a workaround:
http://www.learningsharepoint.com/2013/05/03/missing-save-site-as-template-for-publishing-sites-in-sharepoint-2013/

NOTE: You cannot create a subsite based on a site template that was created in SharePoint 2010. You will need to recreate the site using templates in Fermipoint .

To save a site as a template:

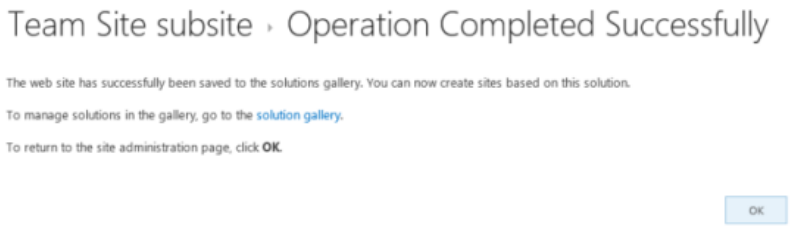
1. Open a Team site that you want to save as template.
2. Navigate to Site Settings. (Select the gear icon and choose **Site Settings**.)
3. From the Site Actions area, select **Save Site as template**.



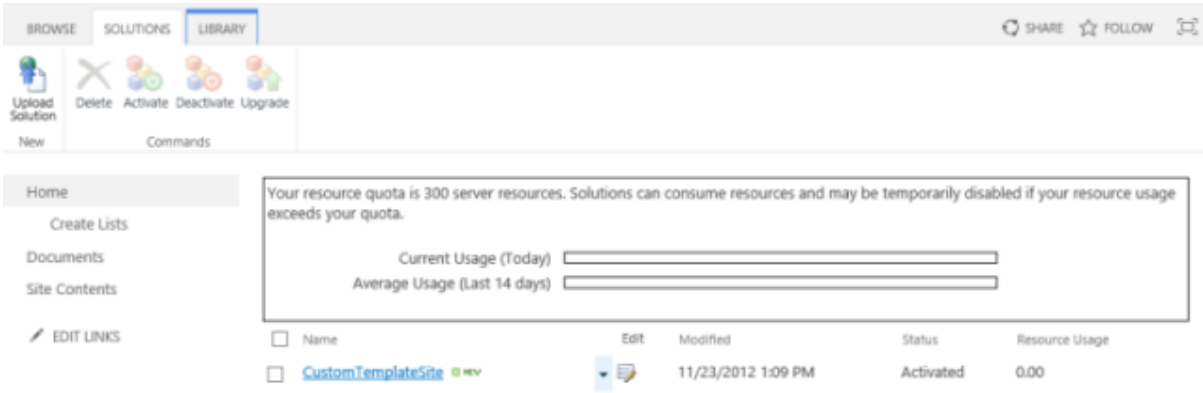
4. From the 'Save as Template' page that appears, fill out the required fields and click **OK**.

TIP: If you want to include content from the site you are saving as a template, check the **Include Content** checkbox.

An 'Operation Completed successfully' message will appear confirming that the template is now available for use from the Solutions Gallery.



NOTE: You can navigate to the solutions gallery to confirm that the custom template is added to the library by clicking the settings gear, choosing **Site Settings** and from the Web Designer Galleries area of the Site Settings page, click **Solutions**.



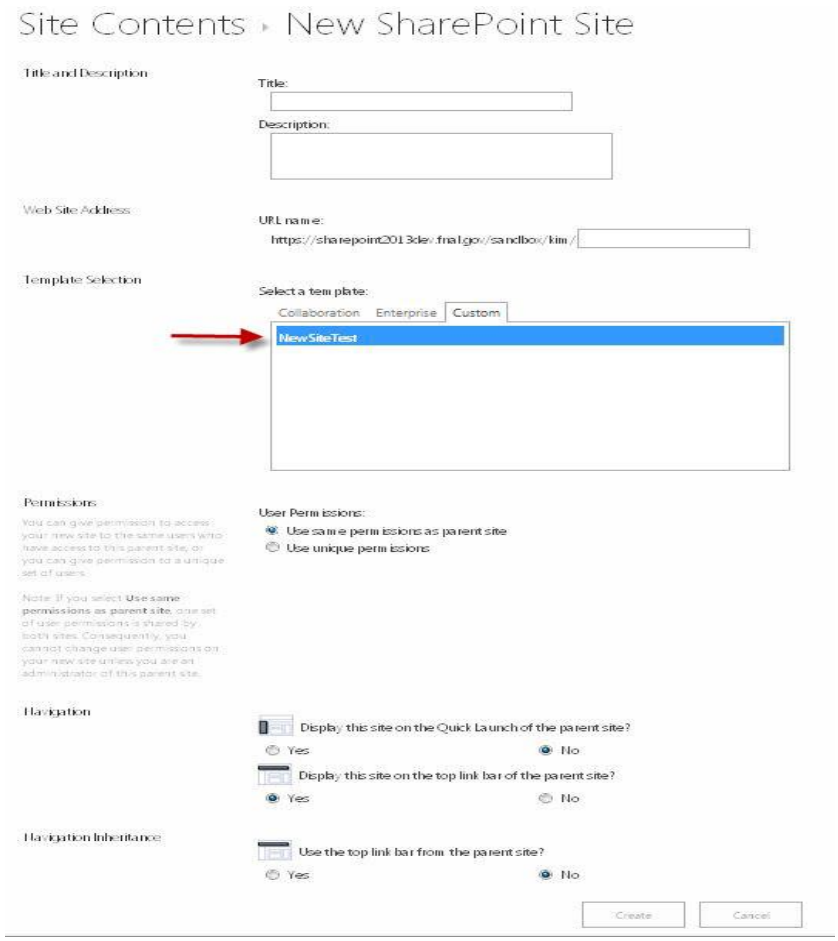
3.6 Create a site from a template

1. Navigate to the Site Contents page. (Select the gear icon and choose **Site Contents.**)
2. Under the Subsites area, select **new subsite**.

Subsites

new subsite

3. From the New SharePoint Site form that appears, fill out all of the required fields and in the 'Select a template' area, choose the **Custom** tab and your new site template should appear in this list. (Click to select it.)
4. When you are done making your changes, click **Create**.



3.7 Creating a Project site

There are a few small differences between Project sites and Team sites:

Project Sites

- Project Functionality site features are activated by default.
- A Project Summary WebPart is added to the main page by default.
- A "Task" list is added by default.

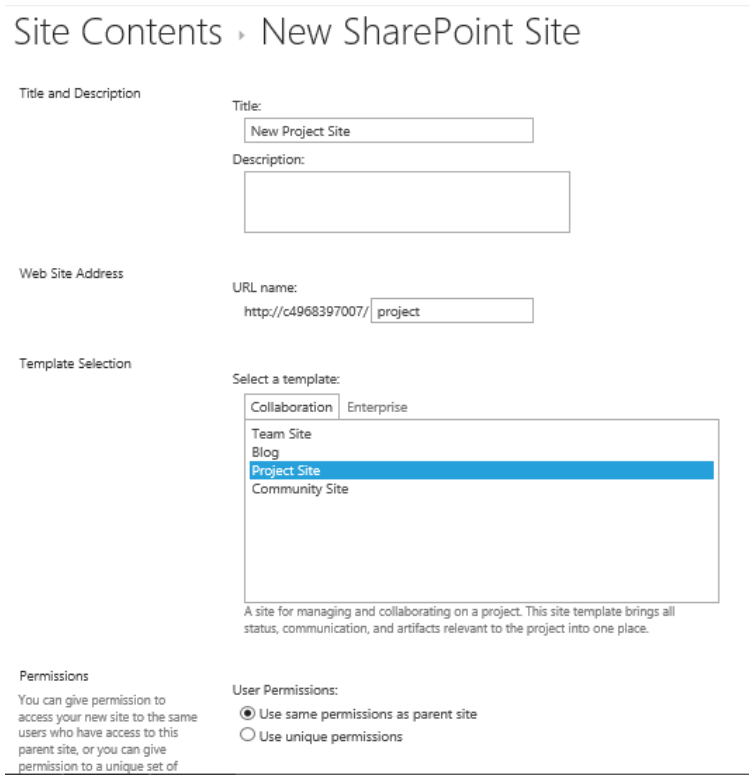
Team Sites

- A “Wiki” home page site feature is activated by default. (The “Project Functionality” feature is not activated by default.)
- The Project Summary WebPart or any Timeline WebPart can be added to the site.
- Team sites have a “Team Task” list added by default.

To learn more about project sites versus team sites, see the following article: http://www.learningsharepoint.com/2012/12/06/the-new-project-sites-in-sharepoint-2013/#ixzz2oiDQFXVI

To create a Project site, you can use the out-of-box *Projects* template.

1. Navigate to Site Contents. (Select the gear icon and choose **Site Contents**.)
2. Under the Subsites’ area, select **new subsite**.
3. From the New SharePoint Site form that appears, fill out all required fields. Select **Project Site** from the ‘Select a template” area.

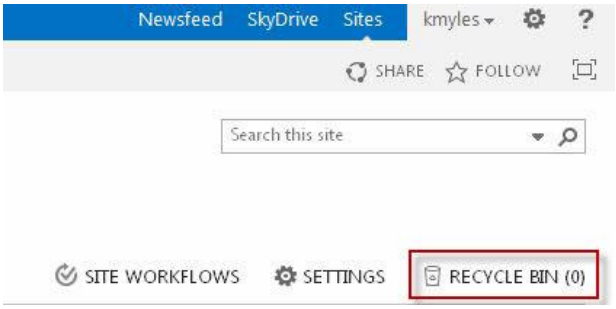


NOTE: Once your new project site is created, you can start updating your Project Summary/ Timeline WebPart, add content to your site’s NewsFeed and drag and drop documents into your Documents WebPart

3.8 Restoring items from the Recycle bin

Site Owners can restore deleted content by performing the following:

1. Select the gear icon and choose **Site Contents**.
2. From the upper left hand corner of the Site Content page, select the recycle bin.



3. Check the box next to the item you want to restore and click Restore Selection. (List item, list, library, page etc.)

3.9 Add a Content Type

Content types enable users to quickly create specialized kinds of content by using the **New Item** or **New Document** command in a list or library. Content types provide site owners a way to make sure that content is consistent across sites. Site owners can pre-configure specific details about the content when they set up content types for a site, list, or library. To learn general information about the benefits of content types, see:

Introduction to content types and content type publishing:

http://office.microsoft.com/en-us/sharepoint-server-help/introduction-to-content-types-and-content-type-publishing-HA102773267.aspx?CTT=5&origin=HA102773269

To create a site content type:

1. Select the Options button (gear icon) and then select **Site Settings**.
2. From the Web Designer Galleries area, choose **Site content types**.
   The Gallery shows all the existing site content types, grouped in categories. The one that you choose becomes the parent of your new content type. The new content type inherits the attributes of its parent.
   TIP Note the name of the parent group, you will need it later.
3. Click **Create** to open the New Site Content Type page.
4. In the Name and Description section, type a name and a description for the new site content type.
5. In the 'Select parent content type**' from** list, select the name of the group that the parent content type belongs to.
6. In the Parent Content Type list, select the name of the parent content type that you want your own content type to be based on.
7. In the Group section, choose whether to store this new site content type inside an existing group or a new group.
8. Click **OK** to save your changes.

The **Site Content Type Information** page for your new content type appears. This page contains links to other pages where you can further customize the new site content type.

3.10 Associate a Word, Excel, or PowerPoint template with a content type

To make sure that documents are consistent, you can associate a Word, Excel, or PowerPoint template with a content type.

To associate a template with a content type:

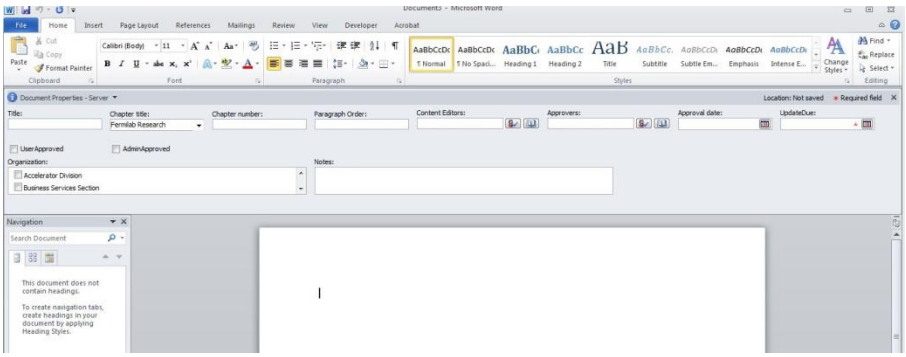
1. Go to the site you want to change a site content type for.
2. Select the Options button (gear icon) and then select **Site Settings**.
3. From the Web Designer Galleries area, choose **Site content types**.
4. Click the name of the content type that you want to change by associating a Word, Excel, or PowerPoint template.

NOTE: If names of the content types are not hyperlinks, it means that this site inherits its site content types from another site. To change the content type, you must navigate to that site.

5. Under Settings, click **Advanced settings**.
6. Enter the location of the template. If the template is stored on your site, click **Enter the URL of an existing document template**, and then type the URL for the template that you want to use. If the document template is stored on your local computer, click **Upload a new document template**, and then click **Browse**. In the **Choose File** dialog box, locate the file that you want to use, select it, and then click **Open**.
7. In the Update Sites and Lists section, under 'Update all content types inheriting from this type?', click **Yes** if you want to update all content types that inherit from this content type with the document template.
8. Click **OK**.

3.11 Configure a content type to always display the Document Information Panel

The Document Information Panel is available for Word, Excel, and PowerPoint in Microsoft Office 2010 and in later versions. The Document Information Panel displays a form on documents of these types, and users can view or change metadata information in the panel. If the document is saved to Fermipoint, they save the information directly from the Office program they use to edit the document.



To configure settings for the Document Information Panel for a content type:

1. Navigate to the site for which you want to change a site content type.
2. Select the Options button (gear icon) and then select **Site Settings**.

3. Under Web Designer Galleries area, choose **Site content types**.
4. Click the name of the site content type that you want to change.

NOTE: If names of the content type that appear are not hyperlinks, then it means that this site inherits its site content types from another site. The site content type must be updated on that site.

5. Under Settings, click **Document Information Panel settings**.

In the Document Information Panel Template section, do one of the following:

6. To use a default template that displays the properties (columns) that were defined for the content type, click **Use the default template for Microsoft Office applications**.
7. To use an existing custom template, click **Use existing custom template (URL, UNC, or URN)**, and then type the path of the location of the template.
8. To upload an existing custom template (XSN), click **Upload an existing custom template (XSN) to use**, and then click **Browse** to locate the template that you want to use.
9. To create a custom panel in InfoPath, click **Create a new custom template**.

NOTE: If you select this option, InfoPath starts and displays the default template, which you can customize to create a custom panel.

10. In the **Show Always** section, specify whether you want this Document Information Panel to display automatically when documents of this content type are first opened or saved.
11. Click **OK**.

4.0 Managing Site Navigation

Please see the following article for an up-to-date overview of managed navigation in SharePoint 2013: http://technet.microsoft.com/en-us/library/dn194311.aspx

4.1 Top Link Bar

The **Top link bar** control displays links to the sites that are one level below the current site in a site hierarchy. It is common for the top link bar to appear at the top of each page in a site. By default, each site has its own unique top navigation. Site owners can customize the top navigation for a specific site.

Owners can choose to inherit the top navigation from the parent site. This approach allows users to switch from one site to another, by allowing the top navigation to stay the same in all the sites (parent site plus any subsites).

Other top navigation configuration features include the following:

- Linking to the web pages of all the top-level sites

- Linking to specified external sites
- Linking to specified sites or pages that are anywhere in the site
- Organizing links under headings
- Manually sorting the items on the top link bar
- Restricting the maximum number of items to show at the global navigation-level only

All top link bar features, such as linking to external sites, can be defined uniquely for each site.

If you are on a top level site, you can add, move or rearrange the links.

To update the top link bar from the top link bar:

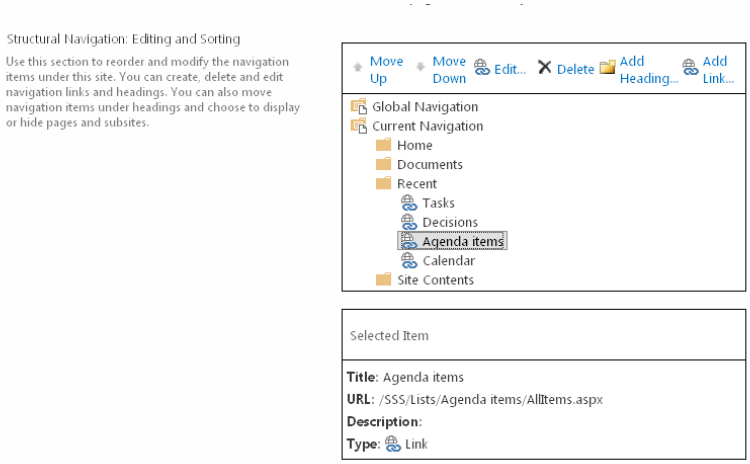
1. Click **EDIT LINKS** from the top link bar**.**

1. To move links, drag and drop them into the order you wish.
2. To delete links, click the "X" icon next to each link you want to remove.
3. To add a link, click the

icon. An "Add a link' dialogue box will open, enter the text to display and the URL for the link and click **OK** to add your new link.

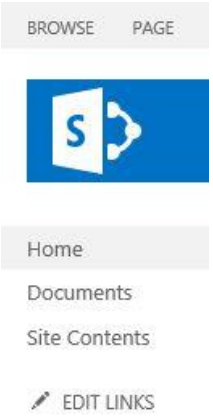
Update the top link bar from Site Settings

1. Click the gear icon in the upper-right corner and then click **Site Settings**.
2. From the Look and Feel area, select **Navigation.**
3. From the **Navigation Settings** page that appears, navigate to the "Structural Navigation: Editing and Sorting" area of the form and make your updates.



4. Click **OK** to save your changes.

4.2 Quick Launch



Quick launch typically highlights the important content in the current site, such as lists and libraries. It appears on the left side of each page in a site.

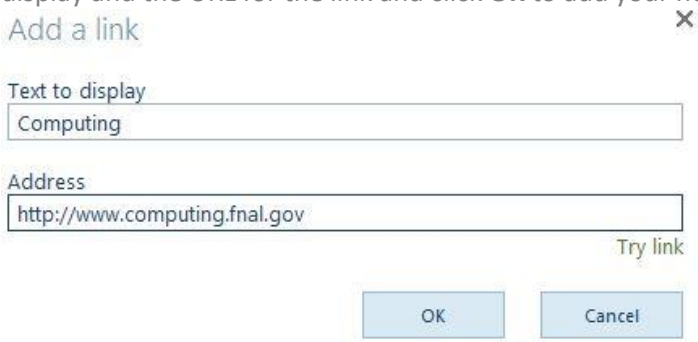
Quick launch configuration features include the following:

- Linking to sites that are on the same level of the site hierarchy as the current site
- Linking to specific external sites or to pages in the current site
- Organizing links under headings
- Manually sorting items in the Quick Launch
- Restricting the maximum number of items to show at the navigation level

To update the Quick Launch from the Quick Launch:

1. Click **EDIT LINKS** from the left navigation (Quick Launch menu).
2. To move links, drag and drop them into the order you wish.
3. To delete links, click the "X" icon next to each link you want to remove.
4. To add a link, click the

icon. An "Add a link' dialogue box will open, enter the text to display and the URL for the link and click **OK** to add your new link.

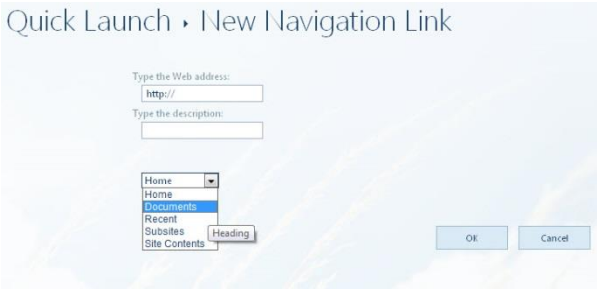


To update the Quick Launch from Site Settings:

1. Click the gear icon in the upper-right corner and then click **Site Settings**.
2. From the Look and Feel area, select **Quick Launch**.
3. You can change the order of the Quick Launch menu by clicking the **Change Order** link from the top menu. You will then see a view of the list enabling you to numerically order it. Click **OK** to save your changes.

4. You can add a new heading by clicking **New Heading** from the top menu. In the New Heading page that appears, add a description and URL for your new heading and click **OK** to save your changes.

5. To add a new link, click New Navigation Link from the top menu. In the New Navigation Link page, add a description, URL and from the Heading dropdown menu select under which heading you would like the link to appear i.e. Home, Documents, Recent etc. Click **OK** to save your changes.



To enable or disable the Quick Launch:

1. Click the gear icon in the upper-right corner and then click **Site Settings**.
2. In the **Look and Feel** area, click **Tree view**, and then select the **Enable Quick Launch** check box.

Just as you customize top navigation, you can also customize the appearance and functionality of vertical navigation by using Design Manager in SharePoint Server 2013 only.

4.3 Tree View

Tree view appears on the left side of the page. If you have enabled Quick launch and Tree view, Tree view will appear below Quick launch. Tree view displays site content, such as lists, libraries, and sites that are in the current site, in a hierarchical structure.

By default, tree view navigation is turned off.

To enable tree view:

1. Select the gear icon and choose **Site Settings**.
2. In the **Look and Feel** area, click **Tree view**.
3. Select the **Enable Tree View** check box.