SharePoint: Site Owners

This class will explore tools and sections of SharePoint available to those with the role of a Site Owner. To access SharePoint, you will need to log into Office 365.

Accessing and Logging In

Office 365 is available on any device with an internet connection. Office 365 works with desktop computers, laptops, tablets, and mobile devices. To access and log into Office 365 go to:

uwm.edu/office365

Once at the login screen, type in your UWM email address and password and click the Sign in button.

Office 365: SharePoint

SharePoint is the app within Office 365 that creates websites used as secure places to store, organize, share and access information. To open SharePoint, click the grid in the upper left corner and then click the SharePoint icon.
### SharePoint Working Screen

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>App Launcher</td>
</tr>
<tr>
<td>2</td>
<td>Ribbon</td>
</tr>
<tr>
<td>3</td>
<td>Site Options</td>
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<td>Quick Launch, Current Navigation or Left Navigation</td>
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<td>5</td>
<td>Top Link Bar or Global Navigation</td>
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<td>6</td>
<td>Search Bar</td>
</tr>
<tr>
<td>7</td>
<td>Page Content</td>
</tr>
</tbody>
</table>

**NOTE:** Office 365 is a cloud service updated and maintained by Microsoft. As a cloud service, Microsoft can update and change features in Office 365 as needed. UWM has little to no control over these changes and parts of this document may be incorrect after printing/publishing because of these updates.
Site Management

As a Site Owner, you can modify parts of your SharePoint site to customize it for your area’s needs.

Add a Subsite

Once you have a main SharePoint site, you can add in subsites. A subsite is useful in multiple scenarios:

- If there is a large amount of related information that does not necessarily belong together in one site.
- If there is a section of your site that needs to have separate permissions from the rest of the site.
- If you want to use multiple SharePoint site types (such as a site that contains a Blog, Project Site and Documents Center).

Below is a list of some of the types of SharePoint templates you can use for a subsite:

<table>
<thead>
<tr>
<th>Template</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Site</td>
<td>Default template; includes tools such as lists and libraries that allow for collaboration between members.</td>
</tr>
<tr>
<td>Blog</td>
<td>Allows for posts, comments and links. Has tools for creating drafts, edit and delete old posts and receive alerts when a blog is updated.</td>
</tr>
<tr>
<td>Project Site</td>
<td>Similar to a Team Site but also includes tools for managing a project such as Project Summary.</td>
</tr>
<tr>
<td>Documents Center</td>
<td>Used for managing large amounts of documents, can be for authoring/editing or for an archive of files.</td>
</tr>
<tr>
<td>Search Center</td>
<td>Top-level site that allows users to search the entire site.</td>
</tr>
</tbody>
</table>

1. Click the Settings (Gear) icon in the upper right corner of the screen and choose Site contents.
2. At the top of the screen under the name of the site, click the New button; from the menu choose Subsite.
3. On the screen that appears, add in a Title and Description, Web Site Address, and Template Selection.
4. In the Permissions section, determine if you want the new subsite to have the same permissions as the parent site or if you want unique permissions.
5. In the Navigation Inheritance section, choose if you want to use the top link bar from the parent site or not.
6. When finished, click Create.
Delete a Subsite

You can delete a subsite if you accidentally create one or if your site contains one that is no longer necessary. The subsite and all its contents (documents, libraries, lists, permission levels) will move to the recycle bin.

1. Navigate to the home page of the subsite you want to delete.
2. Click the Settings (Gear) icon in the upper right corner of the screen and choose Site settings.
3. Under the Site Actions category, click Delete this site.
4. Click the Delete button on the warning screen and then click OK in the confirmation window.

**NOTE:** You cannot delete a subsite if it has additional subsites beneath it; delete any sub-subsites of the subsite first.

Change Site Information

One of the easiest ways to customize a SharePoint site is to change the site title and description.

1. Navigate to the Site settings by clicking the Settings (Gear) icon in the upper right corner and then choosing Site settings from the menu.
2. Under the category Look and Feel, click on Title, description and logo.
3. Using the text boxes, modify the Title, Description and Logo for the site.
4. When finished, click OK at the bottom of the screen.
Change the Look

SharePoint comes with a variety of templates and settings used to change how the site looks.

1. Navigate to the Site settings by clicking the Settings (Gear) icon in the upper right corner and then choosing Site settings from the menu.
2. Under the category Look and Feel, click on Change the look.
3. On the screen that appears, choose the template you want to use.
4. After choosing a template, you have the option to further customize. Add an image, change the colors, layout and fonts.
5. When finished, click Try it out. If you want to keep the resulting page, click Yes, keep it; otherwise, click No, not quite there and make further changes.

Configure Navigation

Typical SharePoint sites contain two navigation elements, the Global Navigation and the Left Navigation. The Global Navigation is located at the top of the screen and contains a link back to the main SharePoint site by default. The Left Navigation shows all the links in your site such as Documents, Notebook and so on.

Using the steps below, you can modify the Global and Left Navigation to include new items as well as configure the existing items.

Rename, Remove or Reorder Navigation

1. To begin configuring the navigation, click EDIT LINKS at the end of the navigation list.
2. To rename a link, click the name of the link and type a new name in the box.

![Image of link names]

3. To remove a link, click the X to the right of the link.

![Image of removed link]

4. To reorder links, click and drag the link to a new location.

![Image of reordered links]

5. When finished, click the Save button.

**Add a New Link**

1. To begin configuring the navigation, click **EDIT LINKS** at the end of the navigation.

2. Click the link button.

![Image of link button]

3. In the box that appears, enter the **Text to display** and the **Address** of the link. Click the **OK** button.

![Image of link input]

4. When finished adding links, click the Save button.

**NOTE:** If you have subsites configured to use the same Global Navigation as the top-level SharePoint site you can only modify the Global Navigation from the top-level SharePoint site.
Add a Page

Sometimes you want information on a single page of a SharePoint site and not in a document library, list or within the contents of a file. To do this, you can add a page to your SharePoint site and have a custom arrangement of links, pictures, embedded video, forms, web parts and text.

Create a New Page

1. Navigate to the site or subsite where you want to insert the new page.

2. In the upper right corner of the screen, click the Settings (Gear) icon. From the menu, choose Site contents.

3. At the top of the screen under the name of the site, click the New button; from the menu choose Page.

4. Enter a Name for the page by clicking the Name your page text and type a new name for the page.

5. To add content to the page, click the + (plus) sign below the page name. Choose the type of content to add and enter the content.

6. To edit or delete the content, click the pencil or trash can icons to the left of the content.

7. To add more content, click the + (plus) sign below the existing content.

8. When you are finished editing the page, click the Publish button in the upper right corner of the page.
Edit a Page

Once a page is created, you can go back and edit the content.

1. Navigate back to the page you created.
2. In the upper right corner of the page, click the Edit button.
3. When you are finished editing the page, click the Publish button in the upper right corner of the page.

Advanced Page Properties

The advanced properties allow you to add the page to the left navigation, set the page as a new homepage and other page properties.

1. In the upper right corner of the screen, click the Settings (Gear) icon. From the menu, choose Site contents.
2. In the contents, click the link in the listing for Site Pages.
3. From the list of pages, click the circle to the left of the page name you want to change the properties for.
4. On the top toolbar, click the … (ellipsis) button, from the drop-down menu, choose an item.

Library and List Management

Document libraries and lists appear in most SharePoint sites and subsites. As a Site Owner, you can configure, modify and manage the setup and files in the library.

Create a New Library

Sites and subsites can contain more than one document library or list.

1. Navigate to the site or subsite where the new library (document library or list) will be located.
2. In the upper right corner of the screen, click the Settings (Gear) icon. From the menu, choose Site contents.

3. At the top of the screen under the name of the site, click the New button; from the menu choose List or Document library.

4. In the pane on the right, enter a Name and Description and choose if you want to see the library in the site navigation. Click Create.

Rename a Library

You can change the name of the default document library (Documents) and rename libraries that you created.

1. Navigate to the library and click the Settings (Gear) icon in the upper right corner of the screen. From the list choose Library settings.

2. Under the General Settings, choose List name, description and navigation.
3. Enter a **Name** and **Description** for the library and choose if it should appear on the Quick Launch. Click the **Save** button.

### Create a Column

To assist the users of the site in managing and finding documents in a library, you can create additional columns of metadata in the library. Users can then sort and filter using these new columns of information.

1. Navigate to the library (document library or list) in the SharePoint site or subsite.

2. In the upper right corner of the screen, click the **Settings (Gear)** icon. From the menu, choose **Library settings**.

3. Scroll down to the **Columns** section. This section lists the default columns such as **Title**, **Created**, **Modified** and **Created By**. To create a new column, click **Create column**.

4. Under **Name and Type** give the column a name and choose the type of column using the radio buttons.

*NOTE*: If you choose the **Managed Metadata** type you can choose from pre-set terms in the UWM SharePoint taxonomy. This includes items such as academic terms, academic programs, buildings and departments.
5. Under **Additional Column Settings** enter a **Description** and other settings. The settings may vary depending on the type of information chosen for the column.

6. When finished, click **OK** at the bottom right corner of the screen. This returns you to the Library Settings; the new column is visible under the **Columns** section.

**NOTE**: If is column is set to **Required** (Require that this column contains information) and there is no default value for the column if a user creates a new document it will remain checked out (no other users can edit the file) until the user sets a value for the required column.

**Use a Column**

Once the column is created, users of the library can use the column to assist in organizing and locating files in the library.

1. Navigate to the library (document library or list) and notice the new column(s) in the library.

2. To change the value of any of the added columns, click the … (ellipsis) button to the right of the file name.

3. From the menu, choose **More** and from the submenu choose **Properties**.

4. Edit the properties as needed.

5. To return to the library, click **Documents** at the top of the screen.

**Edit a Column**

If a column does not function as expected or you want to change the order of new columns you can return to the Library settings and change the columns.

1. In the upper right corner of the screen, click the **Settings (Gear) icon.** From the menu, choose **Library settings**.

2. Under **Columns** click the name of the column you want to edit. Make necessary changes and then click **OK** at the bottom of the screen.

3. To change the sort order, below the list of columns click the link for **Column ordering**.

4. From the list, change the order of the columns and then click **OK**.
Other Library & List Settings

In the Library settings are other tools that can help to manage a library (document library or list).

1. Navigate to the library (document library or list) in the SharePoint site or subsite.
2. In the upper right corner of the screen, click the **Settings (Gear)** icon. From the menu, choose **Library settings**.

3. In the Library settings under **General Settings** there are other useful options:
   a. Click **Versioning settings** to turn off or change versioning and require document check out.
   b. Click **Advanced settings** to change settings for opening documents in the browser and to turn off the ability to create folders

Workflows

SharePoint workflows allow for automated collaboration and approval of items in a list or a library. Workflows are pre-programed flowcharts that automatically direct items from one user to another to gain approval, signatures or feedback. The workflow tracks the process and can show the status of an item in a workflow; in addition, the workflow keeps track of the process and will send reminders when necessary.

Below is a table of the types of workflows available using SharePoint online:

<table>
<thead>
<tr>
<th>Workflow</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval</td>
<td>Routes a document to designated people for approval or rejection.</td>
</tr>
<tr>
<td>Collect Feedback</td>
<td>Routes a document to designated people for feedback then consolidates all the feedback for the workflow owner.</td>
</tr>
<tr>
<td>Collect Signatures</td>
<td>Routes a document to designated people for digital signatures; works only with Word documents, Excel spreadsheets and InfoPath forms.</td>
</tr>
<tr>
<td>Disposition Approval</td>
<td>Manages document expiration and retention by allowing participants to decide to retain or delete expired documents. This workflow is meant to work with a Records Center site.</td>
</tr>
<tr>
<td>Three-state</td>
<td>Track the status of an item through three states. The workflow assigns a task to a person and when that task is complete, it moves on to the next state and contacts the next person for the next task. This workflow is meant to work with the Issue Tracking list template.</td>
</tr>
</tbody>
</table>

**NOTE**: Any user of a SharePoint site with at least **Edit** permissions can participate in a workflow; this includes users in the **Members** and **Owners** groups.
Create a Workflow

1. Navigate to the library (document library or list) in the SharePoint site or subsite where you want to use the workflow.

2. In the upper right corner of the screen, click the **Settings (Gear)** icon. From the menu, choose **Library settings**.

3. In the Library settings under the Permissions and Management section choose **Workflow Settings**.

4. At the bottom of the Workflow Settings, click **Add a workflow**.

5. First, choose the type of workflow.

6. Next, give the workflow a name.

7. If this is the first workflow for this library, you cannot choose the Task or History Lists. If you have more than one workflow, you can choose the Task and History Lists from other existing workflows or choose new lists.
8. Last, choose the start options for the workflow. If you choose manual start the users will need to know how to start a workflow. If you choose either automatic option (create a new item or change an item) the workflow will start on its own.

**NOTE:** If you create a manual start workflow, the user starting the workflow will be given options to change the workflow setting. For automatic workflows, there are no opportunities for the user to change the workflow settings.

9. Click the **Next** button at the bottom of the screen to continue creating the workflow.

10. Depending on the type of workflow chosen, set the options for how the workflow routes the item.

11. When finished setting up the workflow, click the **Save** button.

**Manually Start a Workflow**

If you chose a manual start, the person starting the workflow will need to initiate the workflow.

1. Navigate to the library (document library or list) in the SharePoint site or subsite that contains the workflow.

2. Locate the item in the library that you want to use with the workflow. To the right of the name of the item, click the ... (ellipsis) button. From the menu, choose **More** and then choose **Workflow**.

3. At the top of the screen, choose the name of the workflow you want to use on the item.

4. Manual-start workflows allow the initiator to modify the settings of the workflow. Modify the settings as needed then click the Start button at the bottom of the screen.

**NOTE:** When a workflow is applied to a library, there will be a new column added to the library with the name of the workflow. If you are assigned to complete a task for a workflow, once the task is complete, you can click on the status of the workflow to mark it complete.

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**Edit a Workflow**

If a workflow needs modifications, you can edit the workflow so it is correct.

1. Navigate to the library (document library or list) in the SharePoint site or subsite where you want to edit the workflow.

2. In the upper right corner of the screen, click the Settings (Gear) icon. From the menu, choose Library settings.

3. In the Library settings under the Permissions and Management section choose Workflow Settings.

4. From the list of workflows, click the name of the workflow to edit, make changes and click Save.
Remove a Workflow

If you no longer need a workflow on a library, you can remove the workflow.

1. Navigate to the library (document library or list) in the SharePoint site or subsite where you want to remove the workflow.

2. In the upper right corner of the screen, click the Settings (Gear) icon. From the menu, choose Library settings.

3. In the Library settings under the Permissions and Management section choose Workflow Settings.

4. At the bottom of the screen, click Remove, Block or Restore a Workflow.

5. To temporarily stop a workflow, click the radio button for No New Instances. To stop the workflow entirely, click the radio button for Remove.

6. When finished, click the OK button.
Permissions

Now that your SharePoint site is set up, you can give users permission to access the site. When giving permissions to SharePoint, it is recommended that you add users to groups that grant them permissions instead of individually adding and assigning permissions to users. SharePoint sites have three groups with pre-configured permissions.

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors</td>
<td>Have read-only access to the SharePoint site, cannot create, modify or delete.</td>
</tr>
<tr>
<td>Members</td>
<td>Can view and edit the content of the site, includes the ability to add, modify and delete files and list items. Members cannot change the structure of the site.</td>
</tr>
<tr>
<td>Owners</td>
<td>Have full control of the site and its structure. This group should have a small number of people added so you know who is making changes to your site.</td>
</tr>
</tbody>
</table>

It is recommended that you assign users to a group at the top level of the SharePoint site. Permissions cascade downward, so if you give permissions to the top-level site, they will have permissions to any subsites, lists or libraries within the site collection; this is known as permissions inheritance.

Add a User to a Group

1. Navigate to the top level of the SharePoint site and click the Settings (Gear) icon in the upper right corner and choose Site settings. Under the Users and Permissions category, choose Site permissions.
2. Notice the existing groups: Members, Owners and Visitors.
3. To add users, click the name of the group you want to add them to.
4. On the screen that appears, click the New button at the top of the screen and choose Add Users.
5. In the box that appears, type in the email addresses of the users you want to add. You can also include a personal note in the email invitation. When finished, click Share.
6. The users receive an email with a link to the SharePoint site.
Remove a User from a Group

1. To remove a user from a group, navigate to the list of users in the group by going to Site Permissions and clicking the name of the group.

2. Check the box to the left of the user name you want to remove. If you want to remove more than one user, check the boxes to the left of the other users you want to remove.

3. From the menu at the top, click Actions and then choose Remove Users from Group.

4. The user is removed from the group and no longer has permissions to access the SharePoint site.

Break Inheritance

When you assign users to a group, the users have the same inherited permissions throughout the entire site. This includes access to any libraries, lists, subsites and pages. Sometimes, there are sections that you want to assign a different set of permissions or a section so that is available to certain users. To do this, you need to break the inheritance and change the permissions and groups that have access to that section.

NOTE: If you break inheritance, any items in the site structure below that item will take on the new permissions. For example, if you break inheritance on a subsite and assign new groups and permissions, only those new groups will be able to access the libraries, lists and other items within the subsite.

1. First, navigate to the subsite where you want to break inheritance.

2. Click the Settings (Gear) icon in the upper right corner and choose Site settings. Under the Users and Permissions category, choose Site permissions.

3. On the PERMISSIONS tab of the ribbon, click the Stop Inheriting Permissions button. This does not actually change any permissions; you will need to remove existing permissions and add new permissions next.
4. Next, create new Visitor, Member and Owners groups by selecting the radio button for **Create a new group**. Give each group a unique name and then add members to the group.

![Image of group creation](image.png)

5. When finished, click **OK**.

6. To remove or add new users, click the **Settings (Gear)** icon in the upper right corner and choose **Site settings**. Under the **Users and Permissions** category, choose **Site permissions**.
   
   a. To remove individual users, click the name of the group and remove users from the group.
   
   b. To add individual users, click the name of the group and add users to the group.

**Resume Inheritance**

If you broke inheritance to a section of your site and later decide you want to keep the permissions inheritance, you can resume inheritance.

1. Navigate to the settings for the subsite. On the **PERMISSIONS** tab of the ribbon, click **Delete unique permissions**.

![Image of permissions tab](image.png)

2. Any unique permissions are now replaced with the inherited permissions from the main SharePoint site.

**Getting Help**

For a full listing of all Short Courses offered, visit [uwm.edu/learningtechniques](http://uwm.edu/learningtechniques). For 24/7 access to online technical training videos, visit [uwm.edu/lynda](http://uwm.edu/lynda).

For technical assistance, contact the UWM Help Desk by calling **414-229-4040** (toll-free 877-381-3459) or visit [GetTechHelp.uwm.edu](http://GetTechHelp.uwm.edu).