

SharePoint 2010 Web Publishing Manual

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1. IE Settings

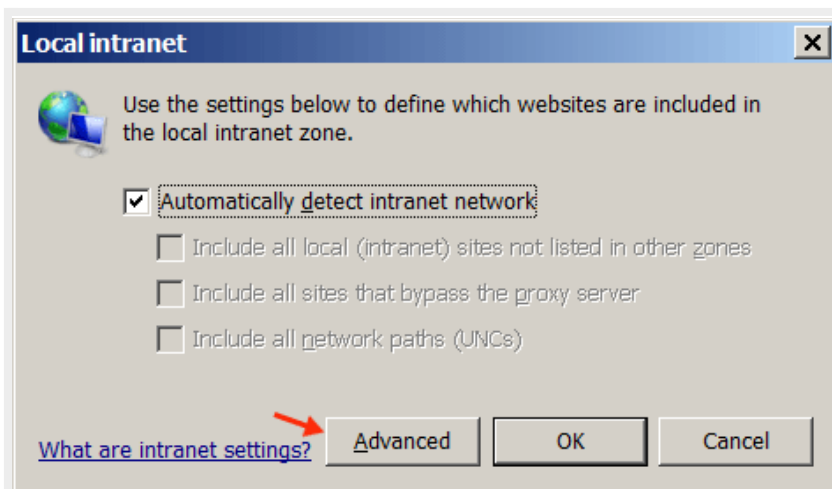
Internet Explorer (IE) should have the correct settings for SharePoint editing tools to work properly.

Step 1: Adding your SharePoint site to Local Intranet zone

- Open your SharePoint site in IE browser
- Go to **Tools** menu and select **Internet Options**
- Select **Local Intranet** and click on **Sites**

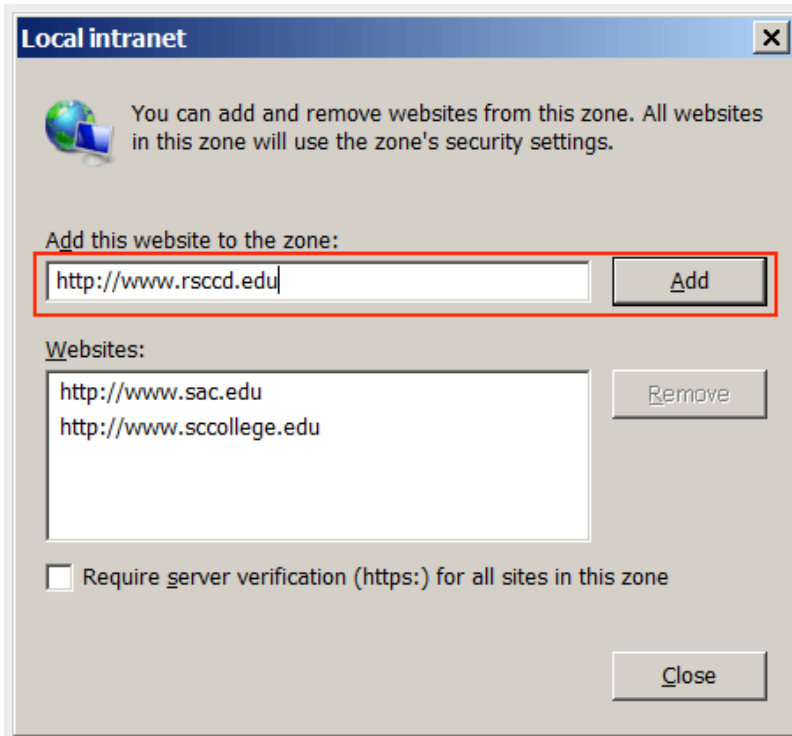


- Click on **Advanced** button in local Intranet dialog box

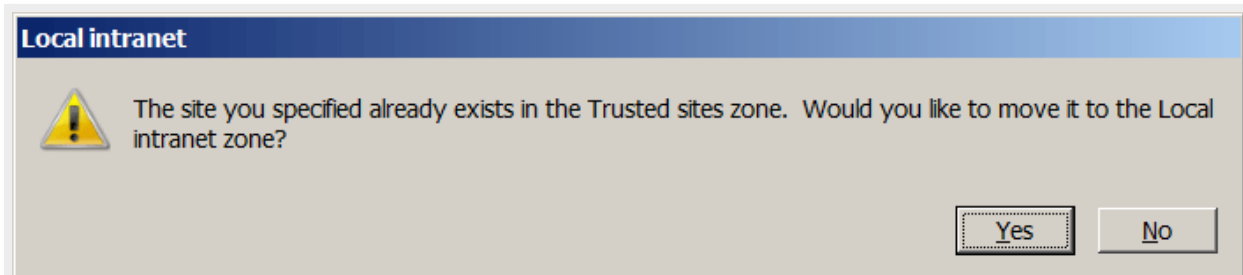


Your site URL (e.g. <http://www.rscdd.edu>) should appear under “Add this website to the zone:”

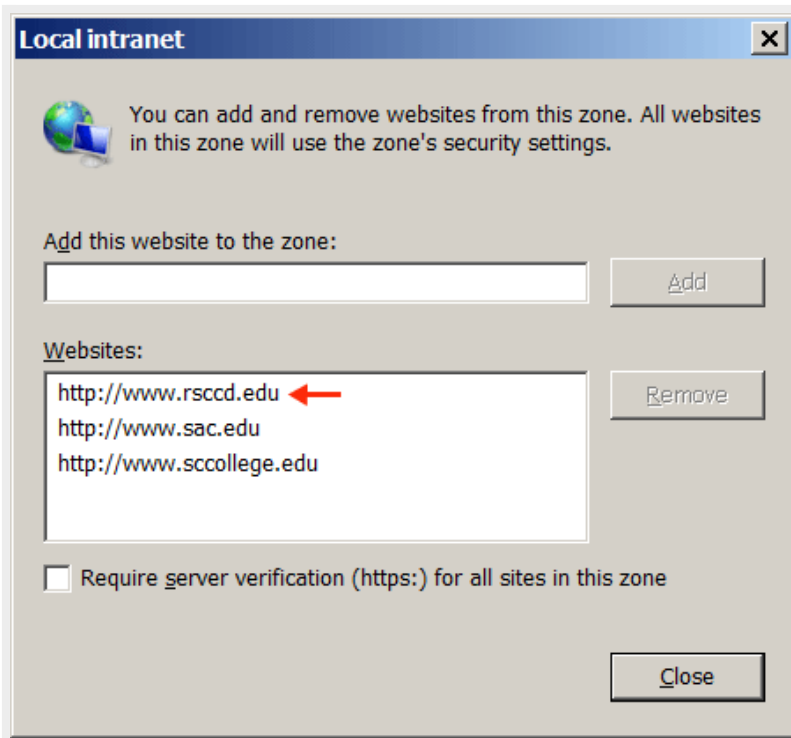
- Click Add



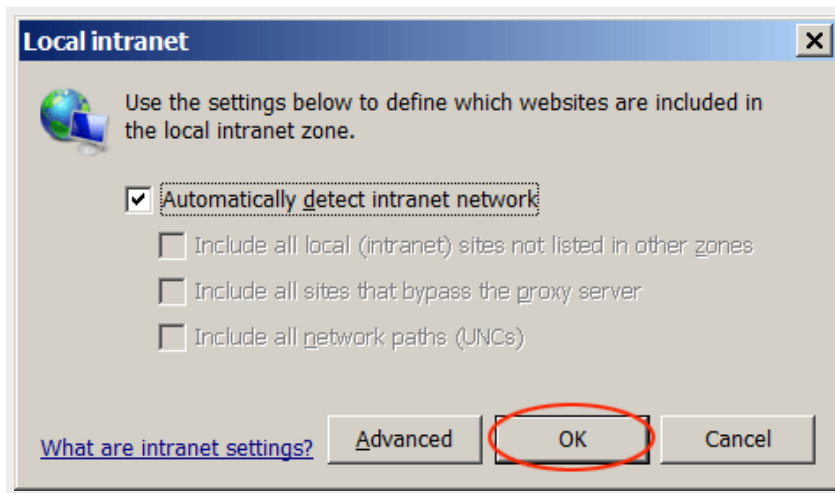
- If your site has been already added to Trusted Sites zone, you will receive the prompt below. Click YES to move your site to the Local Intranet zone



Your site is now added to Local Intranet zone
Click on Close



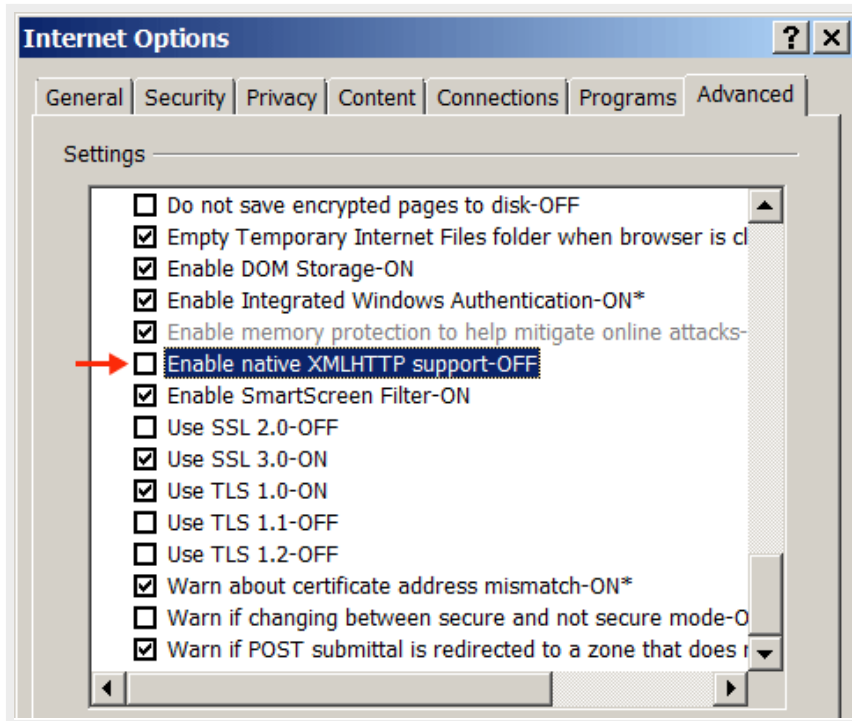
- Click OK to exit Local Intranet dialog box and go back to Internet Options



Step 2: Deselect *Enable native XMLHTTP Support*

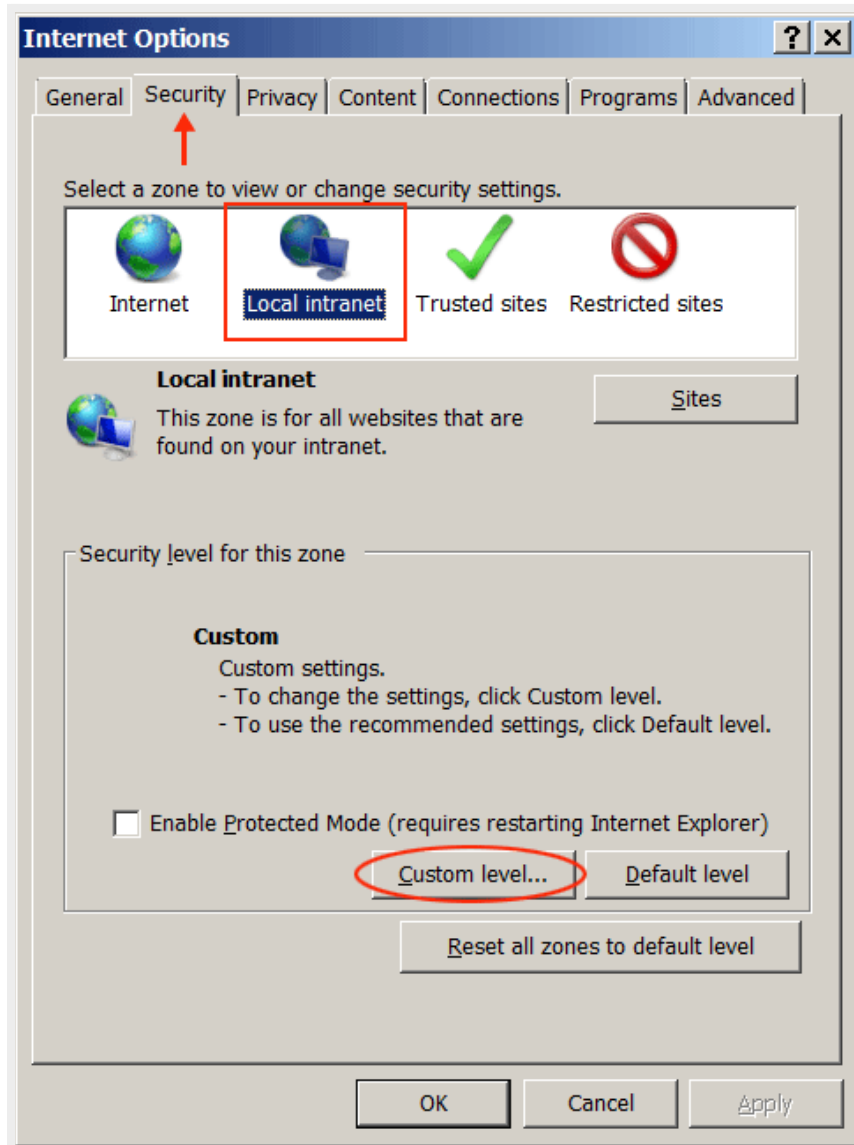
- In Internet Options, select Advanced.

- Look for the option *Enable native XMLHTTP Support*, and uncheck it.



Step 3: Custom level security settings

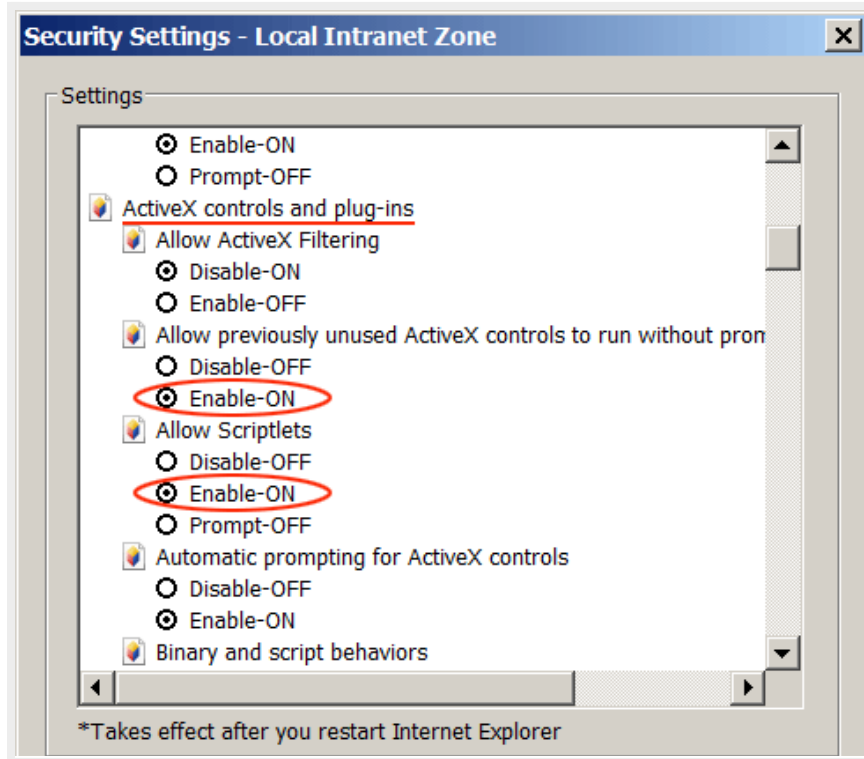
Select Security tab, select Local Intranet and click on Custom Level...



Security Settings:

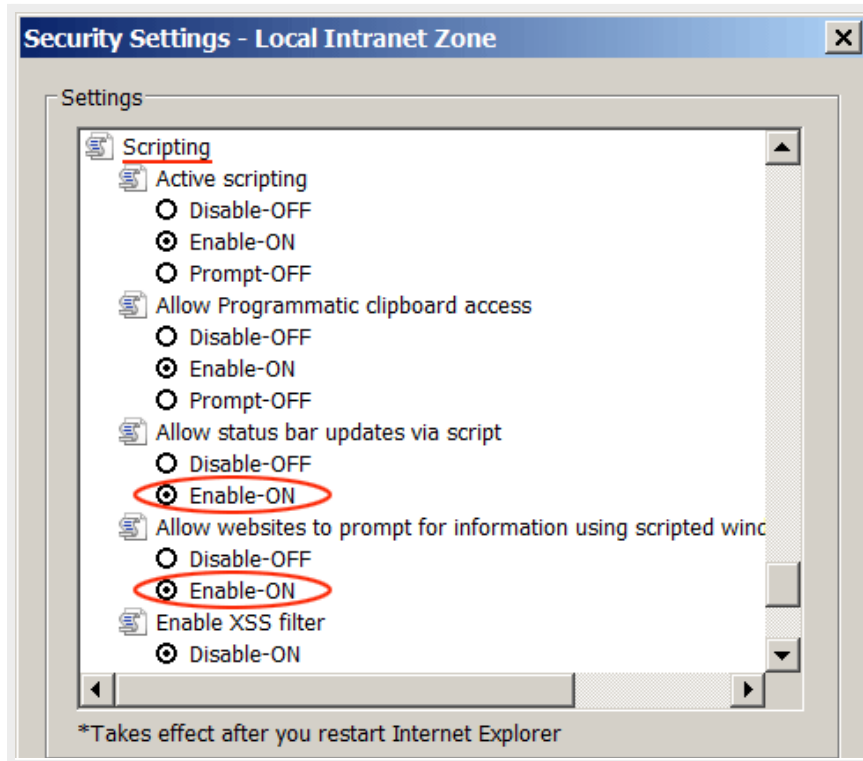
- Under *ActiveX controls and plug-ins*, enable the following settings:
 - Allow previously unused ActiveX controls to run without prompt

- Allow scriptlets



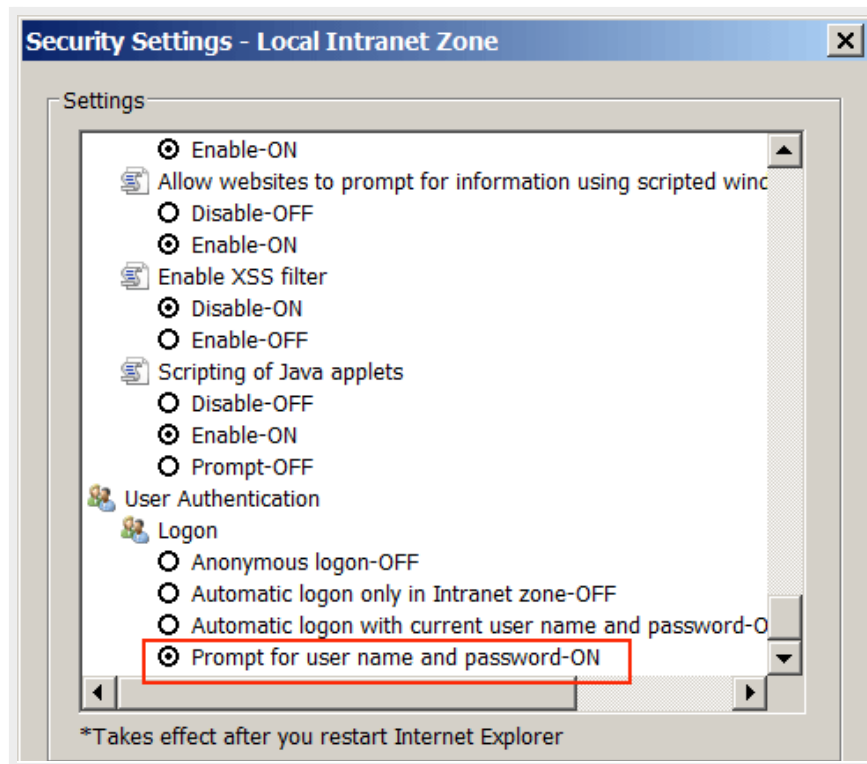
- Under *Scripting*, enable the following settings:
 - Allow status bar updates via script"

- Allow websites to prompt for information using scripted windows



User Authentication

Make sure "Prompt for user name and password" is checked so you are not automatically logged on to local intranet zone.

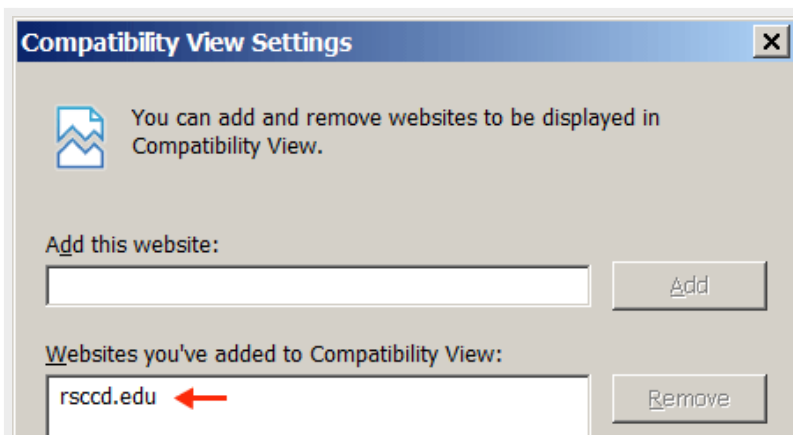
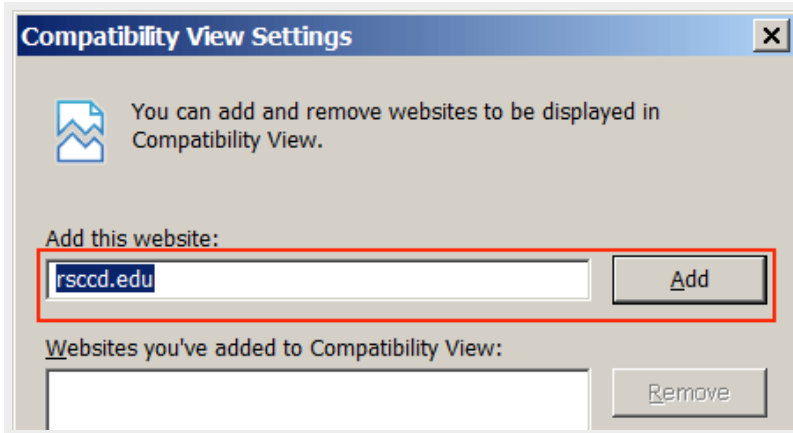


Click OK to exit Internet Options

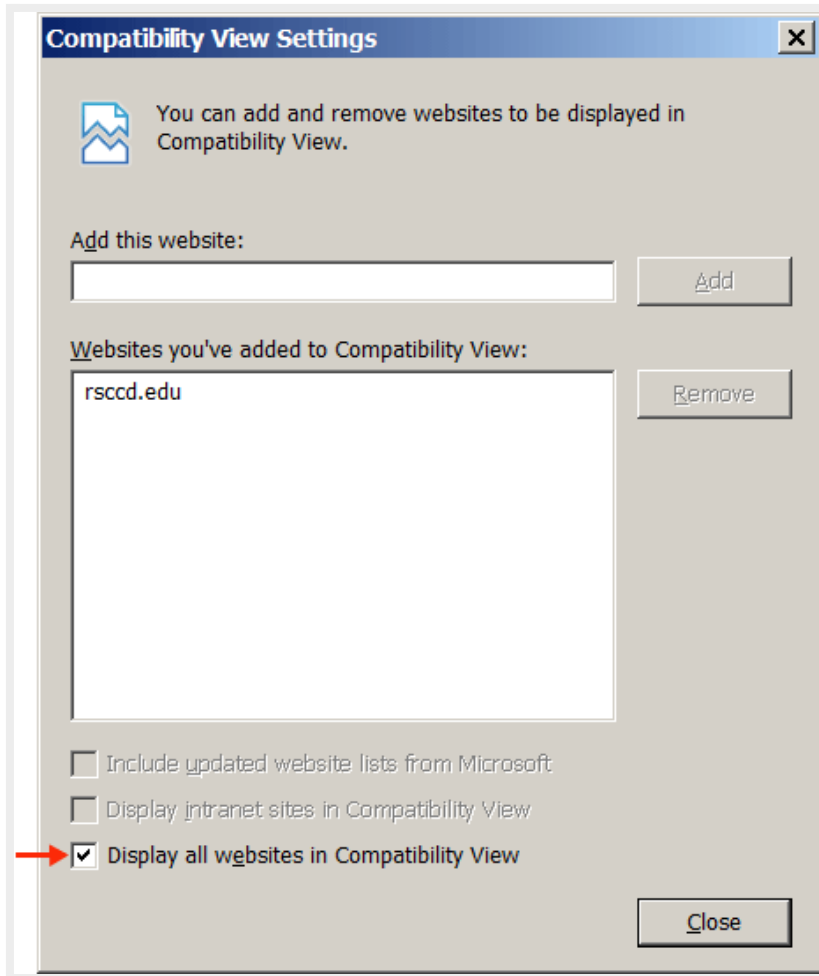
Step 4: Adding your site to compatibility view

- Go to Tools > Compatibility View Settings
- Your site (e.g. *rscdd.edu*) appears under "Add this website:"

- Click Add



- Check "Display all websites in Compatibility View"



Step 5: Applying the new configuration

1. Clear Browsing History
2. Exit IE browser
3. Reopen IE browser

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2. Logging on:

Log on to rscdd.edu:

- Open RSCCD web site (<http://new.rscdd.edu/>)
- Click on **Faculty & Staff** tab on the top navigation
- Click on **SharePoint Sign In** under **General Information**
- Enter your username and network password

Log on to sac.edu:

- Open SAC web site (<http://www.sac.edu/>)
- Click on **Faculty & Staff** tab on the top navigation
- Click on **SharePoint Sign In** link on the left navigation
- Enter your username and network password

Log on to sccollege.edu:

- Open SCC web site (<http://www.sccollege.edu/>)
- Click on **Faculty & Staff** link on the left navigation of the home page
- Click on the **Sign In** link at the bottom right of the top banner
- Enter your username and network password

Note: After logging on, you are taken to the main site home page. Please access the sub-site you have author permission. The editing tools will only appear to you in your site.

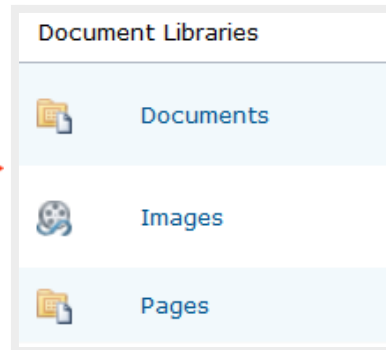
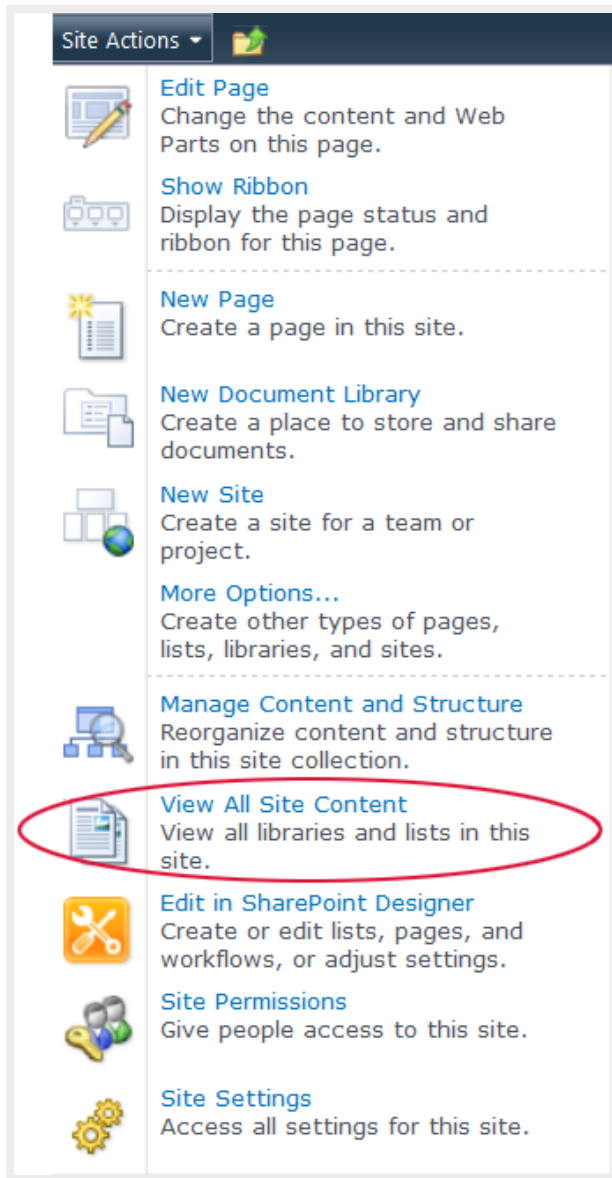
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3. Exploring the Web Publishing Environment

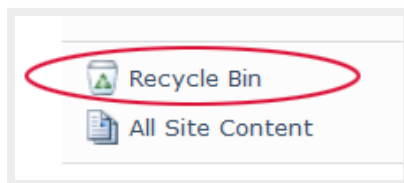
Site Actions

The **Site Actions** menu only appears in the site you have author permission.

- Click on the **Site Actions** menu.
- Click on **View All Site Content**.
- You are taken to the **All Site Content** area, which is the main repository for your site content. You will see three SharePoint Document Libraries:
 - **Documents** - This is where you will upload and store documents (i.e. existing files) that you link to on web pages.
 - **Images** - This is where you upload and store pictures and graphics that you place on web pages.
 - **Pages** - This is where web pages are stored. Notice there is an existing page already in your Pages Library named "default.aspx". This is your home page for the site and is created automatically when a site is created in SharePoint.



Recycle bin



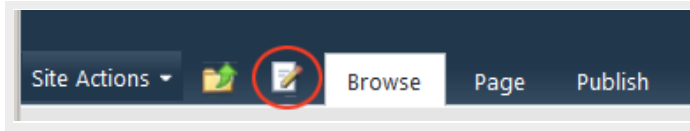
Whenever you delete an item stored in a library (i.e. a document, image, or page) the item is sent to your site's recycle bin where it stays for 60 days (unless this value is changed by your SharePoint Administrator). Use your Recycle Bin to restore an item to the location where it was deleted from.

Note: Your site's Recycle Bin is a completely separate recycle bin that appears on your Windows desktop.

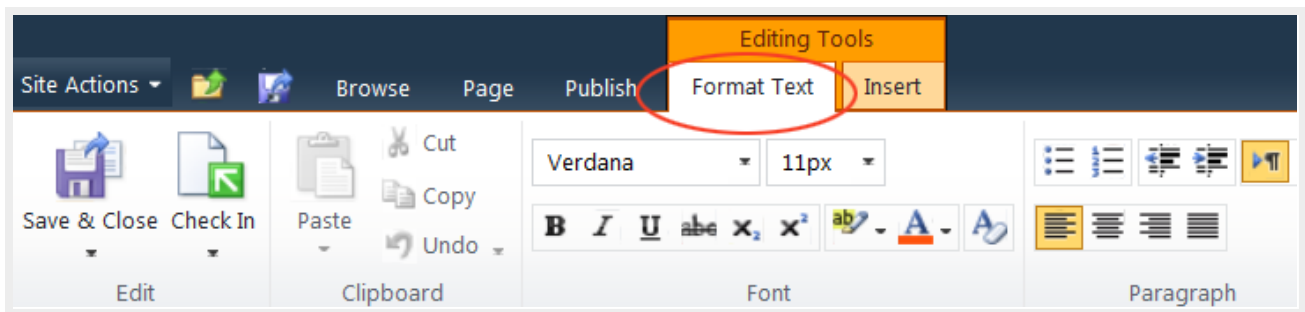
Context sensitive ribbon

The ribbon is a dynamic toolbar that appears across the top of each page. It displays different tools, controls and commands corresponding to the selected tab.

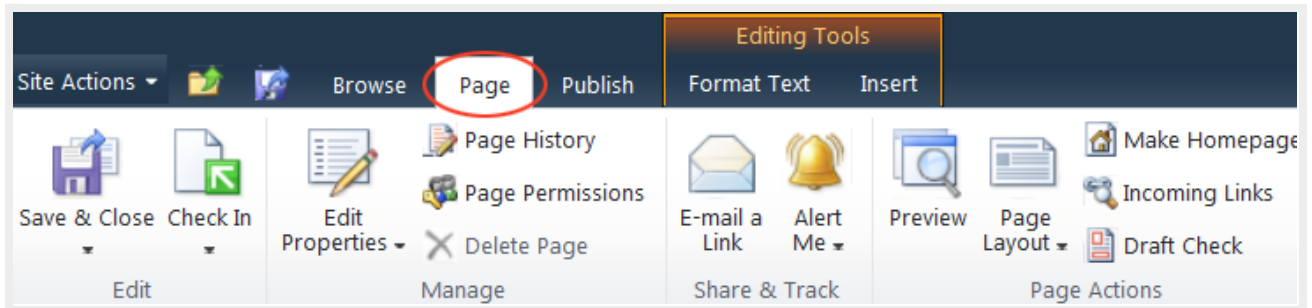
Under **Site Actions**, select **Show Ribbon** and then click on each tab on the ribbon to view related controls.



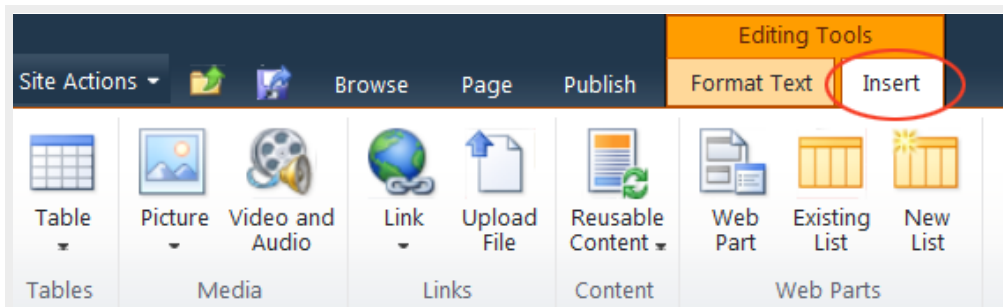
Text editing tools:



Page tools:



Insert:



4. Text Editing

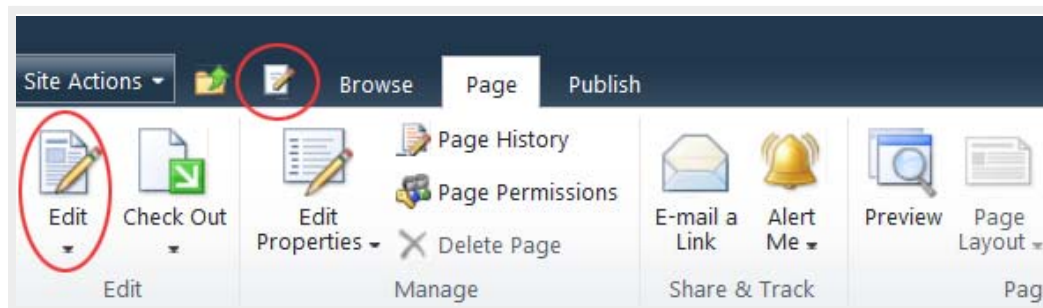
- Open the **Pages** library
- Open the page you want to edit
- Click on the **Page** tab in the ribbon toolbar



Review the options available on the Page ribbon. This is one of many ribbon toolbars that are included in Exploring Web Publishing Environment.

Note: some icons are "grayed out" which means you do not have access to the option.

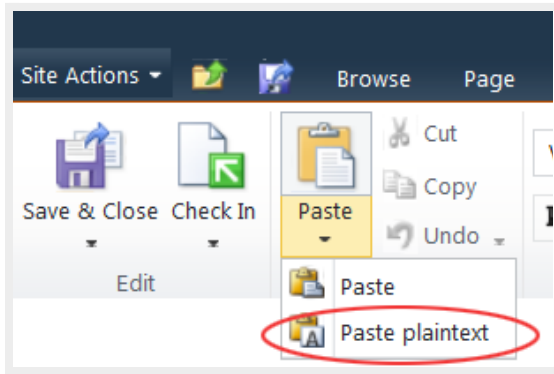
Click on the Edit quick access button (or click on the **Edit** option under **Page** tab).



The ribbon now displays the text editing tools.

Copying/pasting text

- Copy text content from current site or from a Word document
- Place your cursor inside the **Page Content** area
- Select **Paste > Paste plaintext**
(**Paste plaintext** option helps remove inline styles from the original document.)



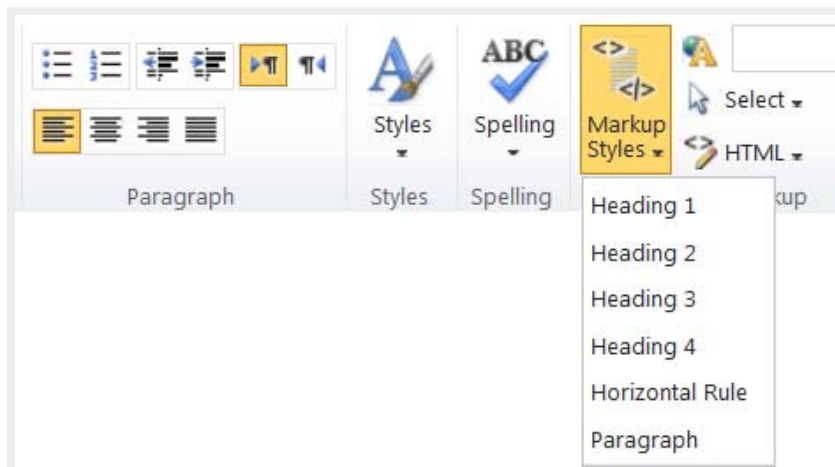
Text formatting

The standard body text style is applied to the page content by default. You don't need to change it. To be compliant to web accessibility, you should structure your page with headings. Screen reader users will navigate the page content through headings.

H1 is the page title, already applied when you create a new page.

H2, H3, H4... are used to structure your page content.

To keep the text formatting consistent across the whole site, please use the Markup Styles to format your text. It is not recommended that you create your own bold and big text with different colors to replace the headings.



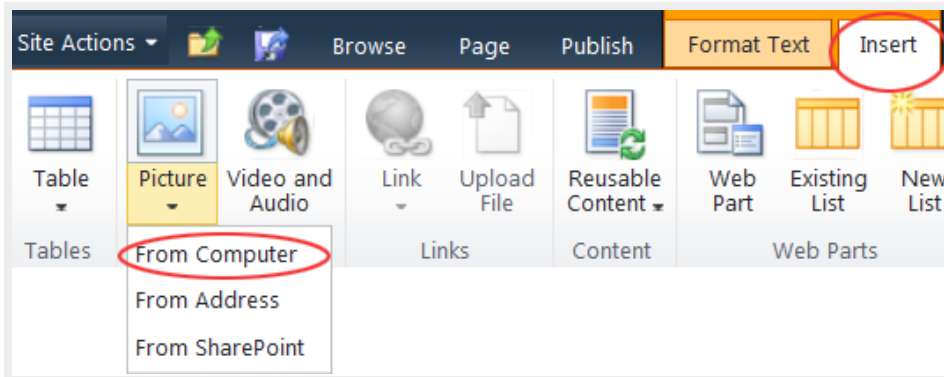
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5. Inserting and Uploading Images

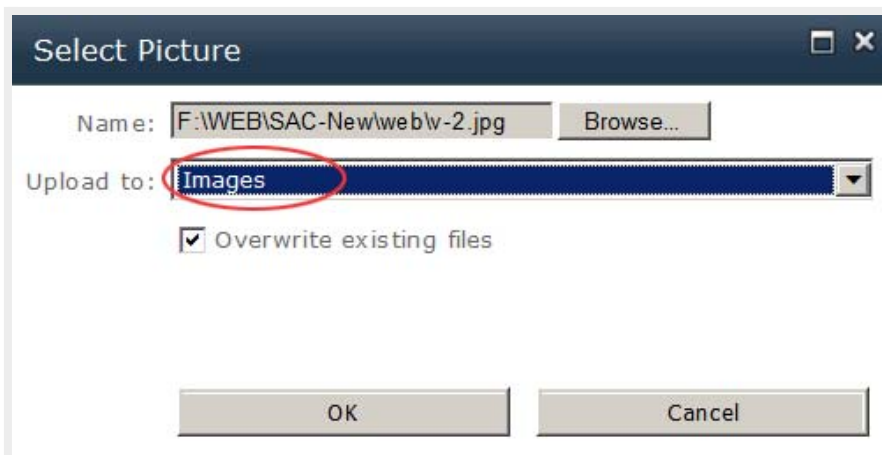
Images used for your web pages need to be upload to the Images Library. You cannot copy an image from a web page or a document and paste it into your page content.

- Place your cursor inside the **Page Content** area and then click on the **Insert** tab on the ribbon.

- Click on the arrow under the **Picture** icon, and select **From Computer**.



- In the **Select Picture** dialog window, click on the **Browse** button. Browse to the location of your image file, click on the file name and select the **Open** button.
- On the **Select Picture** dialog window, ensure that **Images** is selected in the "Upload to" field. This will ensure that your image file is uploaded into your **Images Library**. Click on the **OK** button to upload and save the image.



The image properties dialog window will open.

Image properties are optional. If you don't need any change, click Cancel to close the window.

With the image is selected, the **Picture Tools** are displayed on the ribbon. Select its position, add Alt Text and edit other properties if needed.

The image is now appropriately placed on the page and contains alt text as required for accessibility compliance (Read more about alt text below this part).

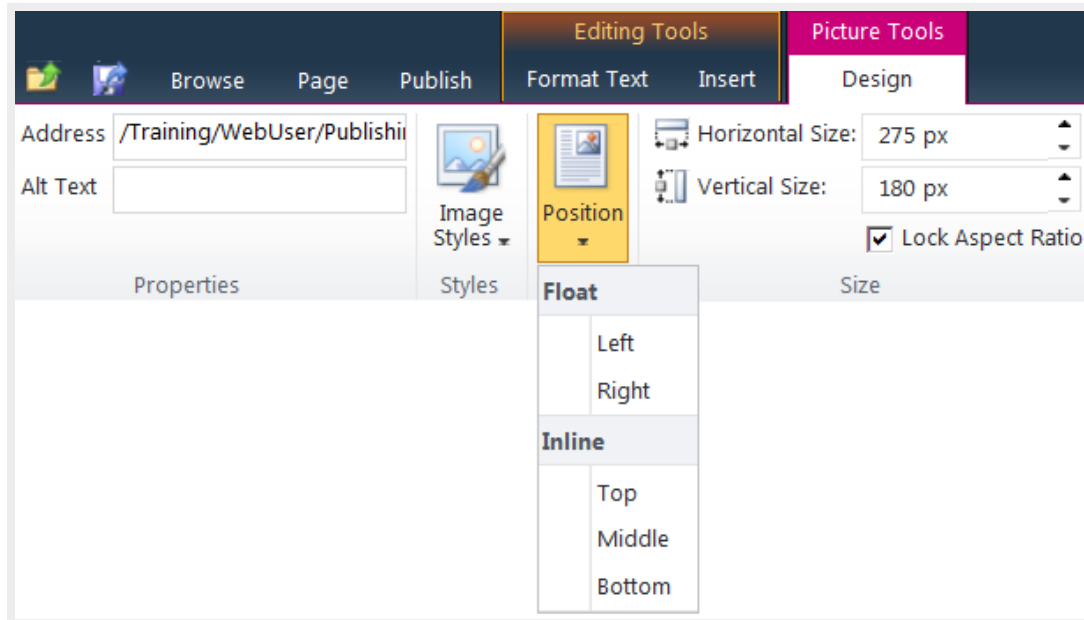


Image placement requirements:

- You must use one of the 3 following file formats:
 - **JPG** - for photos
 - **GIF** - for graphics with solid colors
 - **PNG** - graphics with solid colors or with a transparent background (e.g. logo, buttons, saved from vector graphics)
- Your image must be **sized**
Avoid using big images for page content because this will slow down the page loading time. Less than 100KB file size is more preferable.
If you use Photoshop or another image editor software, select the "**Save for Web...**" option to optimize your images for web use.
- Images must be **uploaded to Images Library**
- **Insert** image to the page
- **Position** as needed (float left/right)
- Add **Alt text**

More About Alt Text...

To comply with Web accessibility standards when placing images and graphics on pages, always remember to alternative text "alt text" for every image placed on a web page.

Here are some general guidelines on the use of alt text:

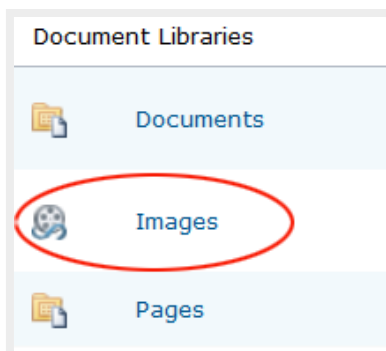
- If the image conveys information, or conveys text, then the alt text should convey the same information.

- If the purpose of the image/graphic is to provide "eye candy" (i.e. visually setting a mood) then alt text should be blank.
- If the image is redundant or conveys no information, the alt text should be blank.
- If the image is an active link, the alt text should be the function of the image (i.e. what the target of the link is).
- In all instances of Alt Text, avoid entering "picture of..." or "image of..." or "link to..." etc. as screen reading software already informs the user of this when they encounter an image or link.
- When images of tables or graphs are placed on page, in addition to alt text, a complete description of the information contained on the table or graph should follow the image.

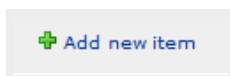
Uploading images into the Images Library

Upload your images before using them for your web pages.

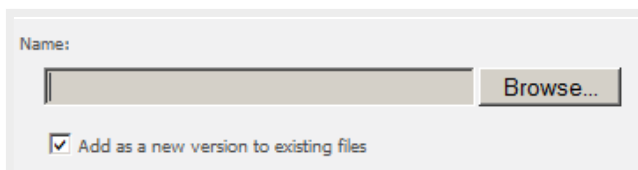
- Go to **Site Actions**, select **View All Site Content**
- Open the **Images Library**



- Click on **Add new item**



- Click on the **Browse** button to browse to a single image file to upload, or select **"Upload Multiple Files..."** to upload multiple files in one time

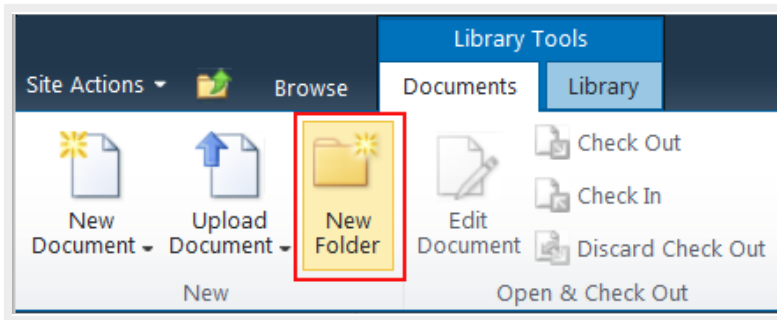


Note: Currently, only Internet Explorer (IE) browser supports multiple files uploading.

Creating image folders

Images of the same category should be organized in a separate folder created under the **Images Library**.

- Open the Images Library
- Click on Documents under Library Tools tab



- Select **New Folder**
- Name the new folder
- Open the new folder
- Click on "Add new item" link to upload images

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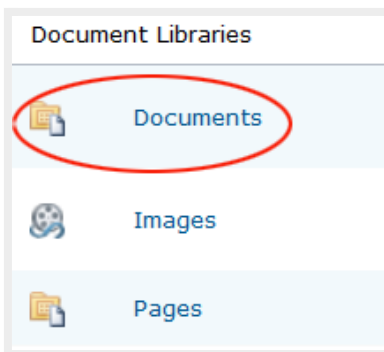
6. Uploading and Downloading Documents

Before linking to your web pages, documents should be uploaded to the Documents Library.

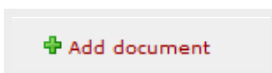
PDF file format is recommended for documents used for the web.

Uploading Documents to the Documents Library

- Go to Site Actions, select View All Site Content and open the Documents Library.



Click on **Add document**.

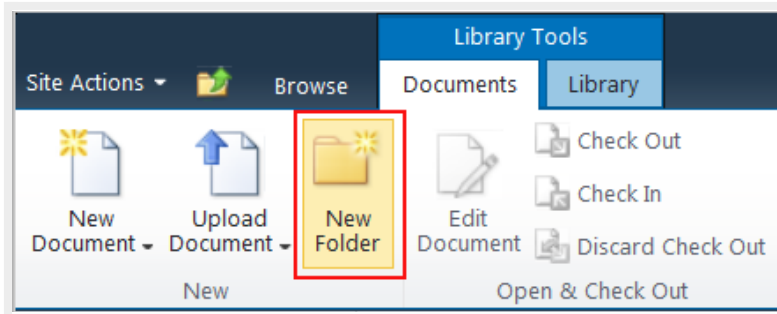


- Browse to a single image file to upload, or select "Upload Multiple Files..." to upload multiple files in one time. Currently, only Internet Explorer (IE) browser supports multiple files uploading.

Creating Document Folders

Documents of the same category should be organized in a separate folder created under the **Documents Library**.

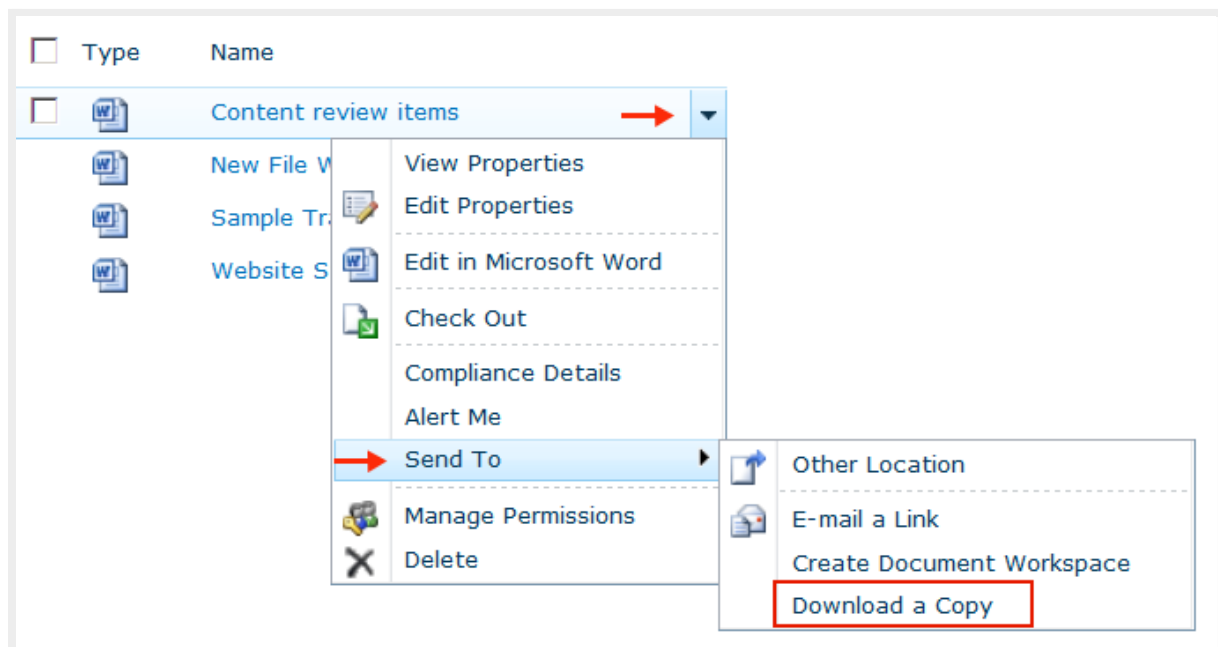
- Open the **Documents Library**
- Click on **Documents** under **Library Tools** tab



- Select **New Folder**
- Name the new folder
- Open the new folder
- Click on "Add document" link to upload documents

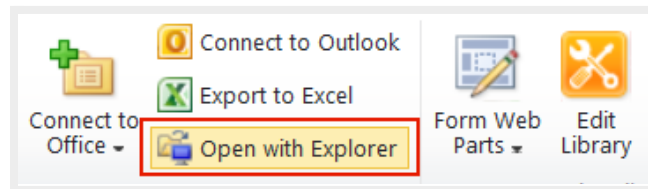
Downloading Documents from a Documents Library

To download each document from the Documents Library, click on the arrow on the right of the document file name and select "Download a Copy" from the dropdown menu.

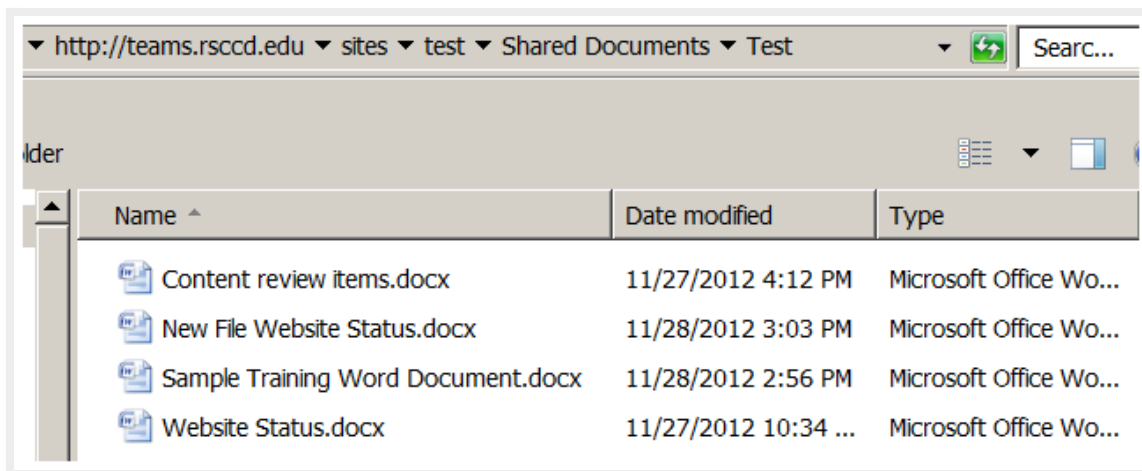


To download multiple documents,

- open the Documents Library or any subfolder you want to download documents from it



- click on **Open with Explorer** link on the ribbon
- A window explorer will pop up for you to copy the document files and paste into your local machine



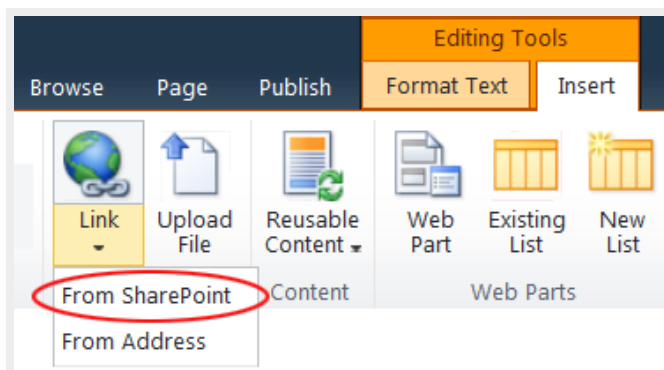
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7. Creating Links

In the page content you could create 3 types of links: link to another web page, link to a document and external link.

Link to another web page:

- Highlight the text you want to make a link
- Select the **Insert** tab
- Select **Link** and then select **From SharePoint**



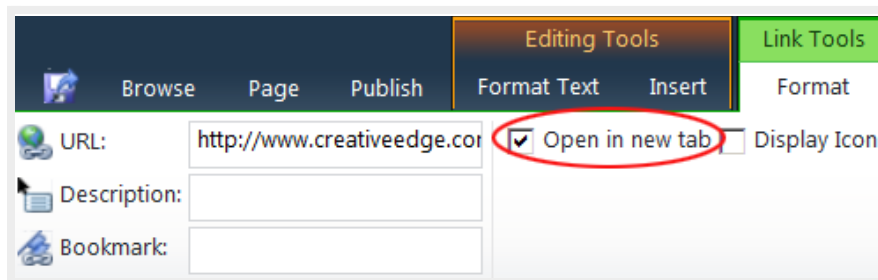
- In the **Select an Asset** dialog box, click on the **Pages** library link on the left bar to display all web pages
- Select the page you want to link and click OK

Link to a document:

- Highlight the text you want to make a link
- Select the **Insert** tab
- Select **Link** and then select **From SharePoint**
- In the **Select an Asset** dialog box, click on the **Documents** library link on the left bar to display all documents
- Select the document you want to link and click OK

Note: link to a document should open a new window.

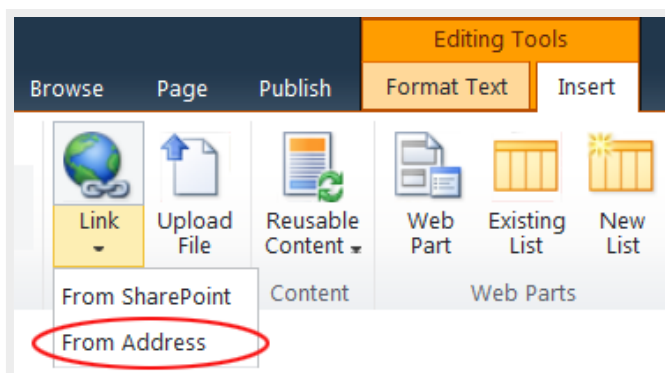
Check “Open in new tab” under **Link Tools /Format** on the ribbon.



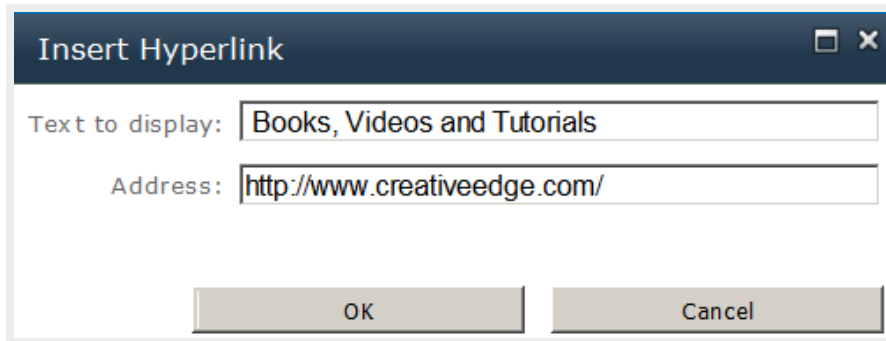
From the **Select an Asset** dialog box, you can upload a new file to link to. Select the appropriate documents library (**Documents** or **Pages**) on the left pane to open it, click on the “Upload” link, and upload your file to that specific library. Then, you can create a link to the newly uploaded file.

Link to an external web page:

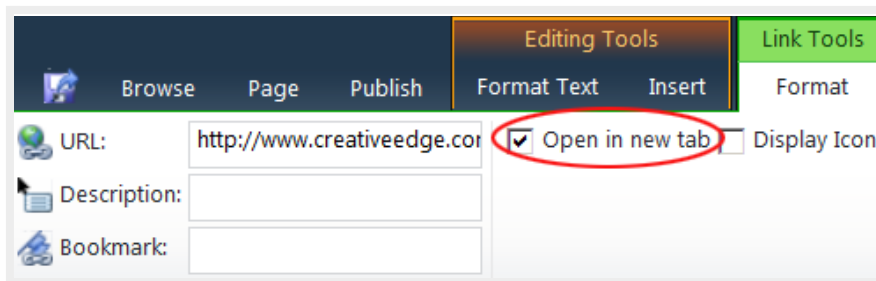
- Highlight the text you want to make a link
- Select the **Insert** tab
- Select **Link** and then select **From Address**



- In the **Insert Hyperlink** dialog box, enter the URL of the web site or web page you want to link to



Note: External web page should open in a new window.
Check “Open in new tab” under Link Tools /Format on the ribbon.

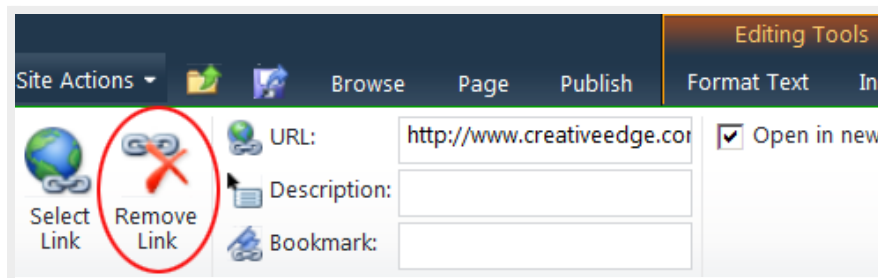


Inserting a link to an image

- Select the image you want to insert a hyperlink
- If you select **From SharePoint**, the process is the same as creating a text link above
- If you select **From Address**, enter the URL to the Address field
Leave the “Text to display” field blank. (Note: External web page should open in a new window.)

Removing a link

Place cursor on the link and then click on “**Remove Link**” on the ribbon.



Note: Deleting an existing link in the **URL** field does not remove it completely. The link still remains, but pointing to the default page. To remove a link completely, click on “Remove Link” icon.

Changing the URL of an existing link

- Place cursor on the existing link and click **Select Link** icon
- Select a document or web page from SharePoint site
- For external link, enter URL to the Location(URL) field and check “Open in a New Tab”

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8. Inserting Tables

- Click on the **Edit** tab
- Select **Insert > Table**
- Select the number of rows and columns

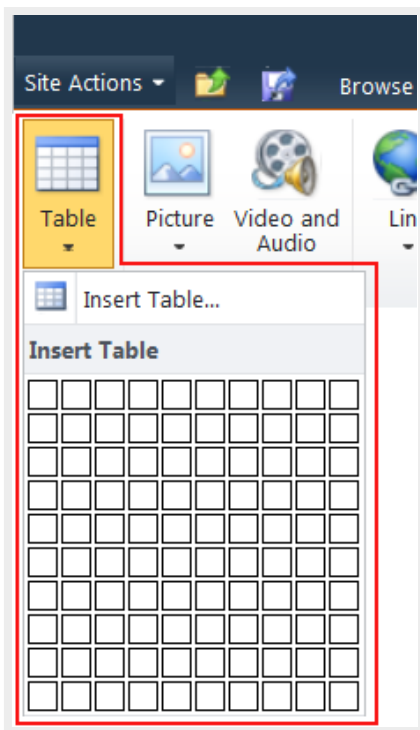


Table Tools

Table Layout:

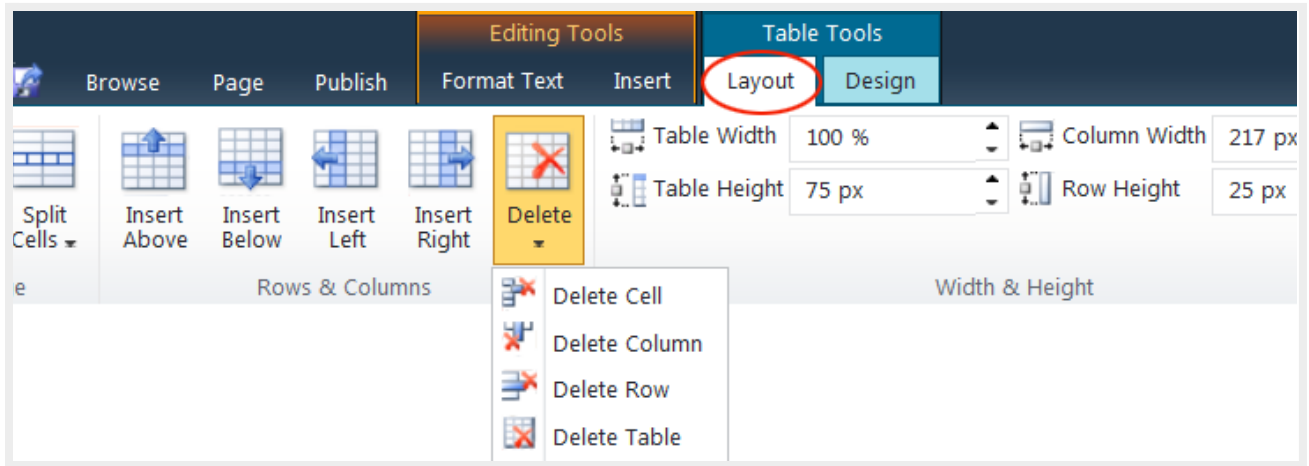
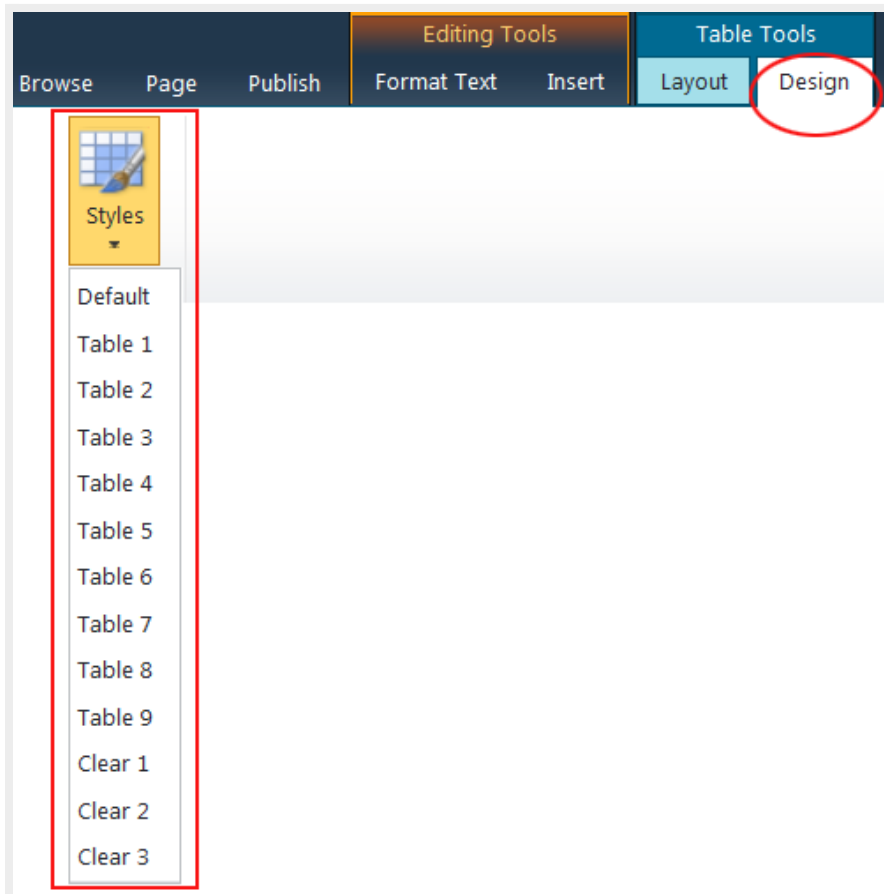


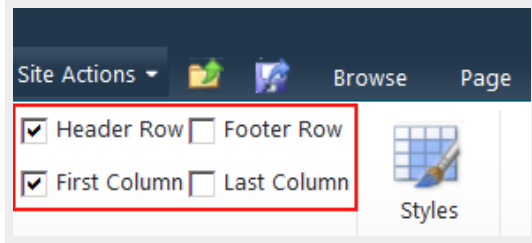
Table Design:

Selecting a predefined table style.



The Clear tables are used to line up text blocks or graphics in columns and rows. They have no borders.

Options to display column and row headers:

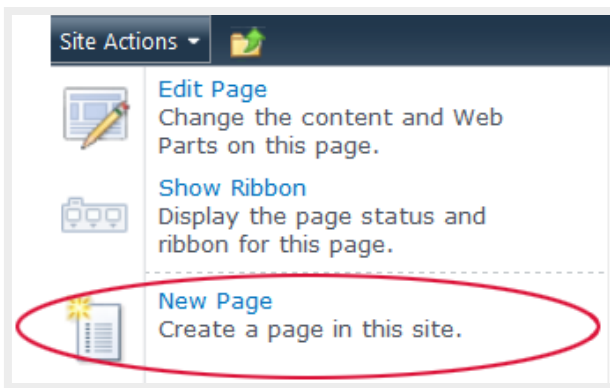


Header Row and First column are checked by default.

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9. Creating New Pages

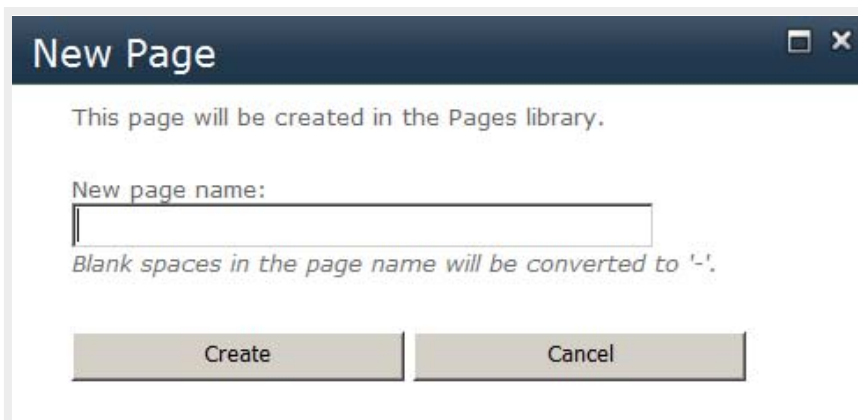
- Click on **Site Actions** and select **New Page**



You can also create a new page in **All Site Content** by clicking on the **Create** link.



- Enter the new page name and click **Create** (View #14 - File naming convention)



You are redirected to the new page in edit page mode which means you can start to add content to the page.

In the **Title** field, edit the page title.

Note: Page Titles are different than page names: page titles appear on top of the web pages, they should contain spaces. Page names are file names, they should not contain spaces.

The link to the newly created page is automatically placed on the current site navigation bar after you published it.

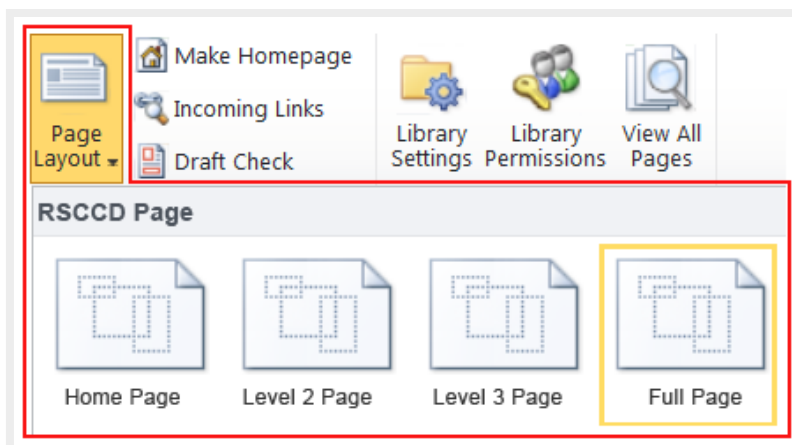
You could disable this feature in the **Navigation Settings** and add links manually to the current site navigation. There are pages you want to create links in the page content and don't want them to automatically show on the left navigation. (View #13 - Modifying navigation / Current navigation)

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10. Changing Page Layout

To change the page layout, you need to be in editing mode.

- Select **Edit** tab and then select **Page** tab
- Select a page layout from **Page Layout** dropdown



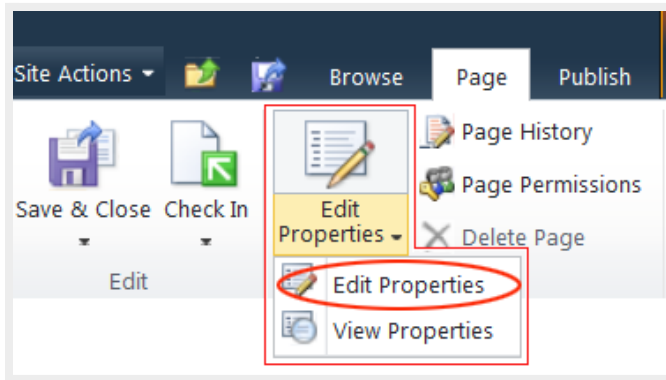
Each web site collection (RSCCD, SAC, SCC, Foundation...) has its own set of page layouts. If the default page layout does not suit your page content, you can change it to a more suitable one.

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11. Editing Page Properties

You can change the file name, title, and others page elements for an existing web page by editing its properties.

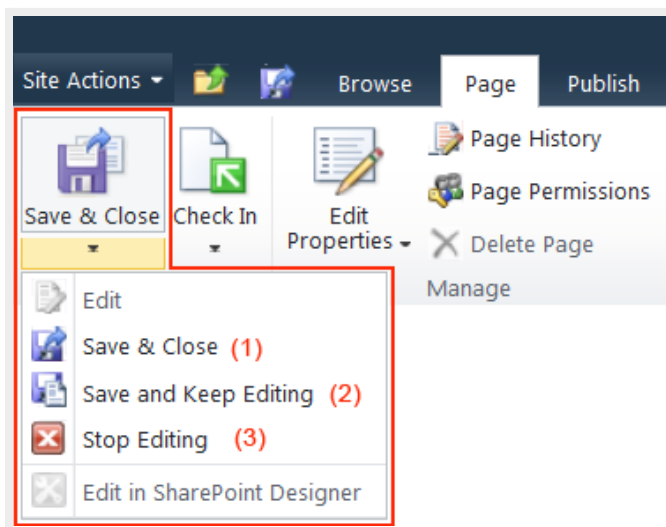
To open the page properties, select **Edit Properties** under the **Page** tab.



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12. Saving a Web Page

There are 3 options for saving and closing a web page:



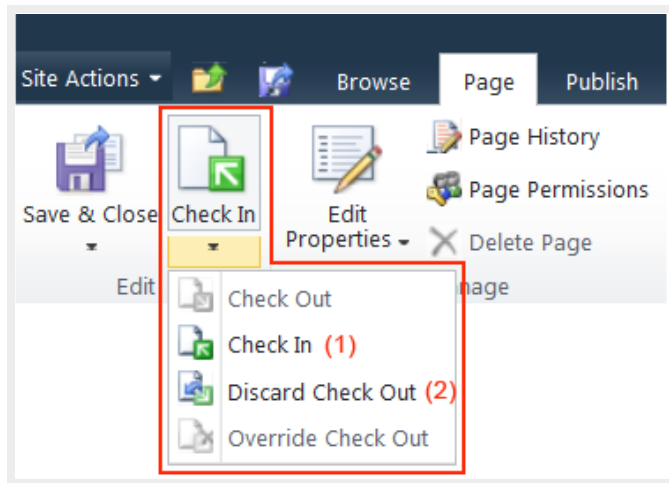
1. **Save & Close:** Save changes to the page and exit edit mode
2. **Save and Keep Editing:** Save changes to the page and continue editing
3. **Stop Editing:** Exit edit mode on this page. You will be prompted to save or discard your changes.

When you open a web page in edit mode, it is checked out to you. The status bar shows that the page is "checked out and editable".

Status: Checked out and editable.

When a page is checked out to you, other permitted users cannot see your changes, and cannot edit that page until you check it in.

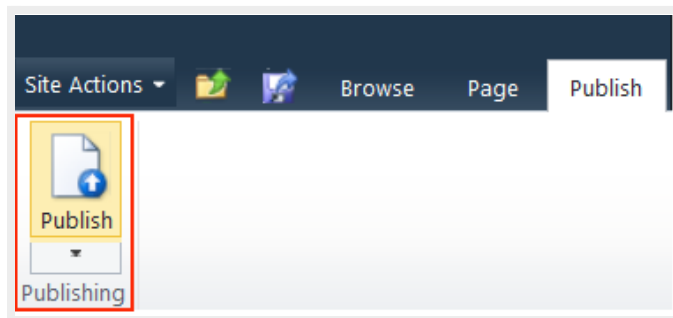
Check In options:



1. **Check In:** You check in the page which is currently checked out to you.
2. **Discard Check Out:** Check in this page, discarding any changes you have made to your checked out version.

While you are working on the update and save your page, your changes are not visible to the public. You need to publish your page for the update to be viewable by the public.

Select **Publish** tab and click **Publish**.



SharePoint creates a minor version of a page each time you check it in. And, a major version is created each time you publish a page. The current live page is the latest major version.

Major versions are always in whole numbers, such as 1.0, 2.0, and so on. Minor versions are denoted by decimals following a major version number, such as 1.1, 1.2, 1.3 and so on. Supposed the latest minor version is 4.3, when you publish the page the next major version will be 5.0.

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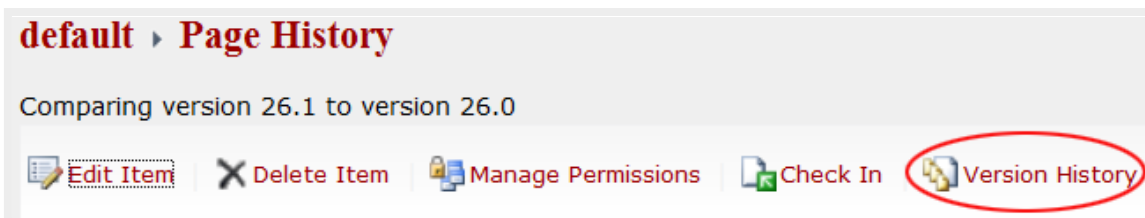
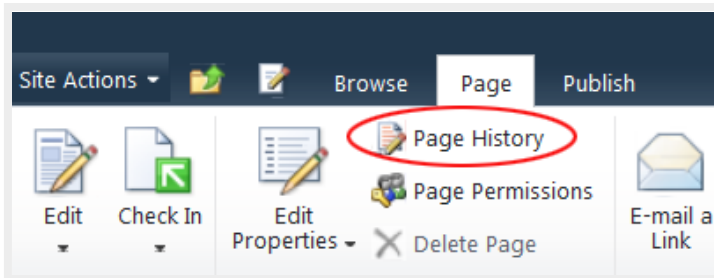
13 - Page History

- Each web page has a version history.

- The number of major and minor versions can be set in **Page Library Settings > Versioning Settings**
- You can restore a previous version of a page.

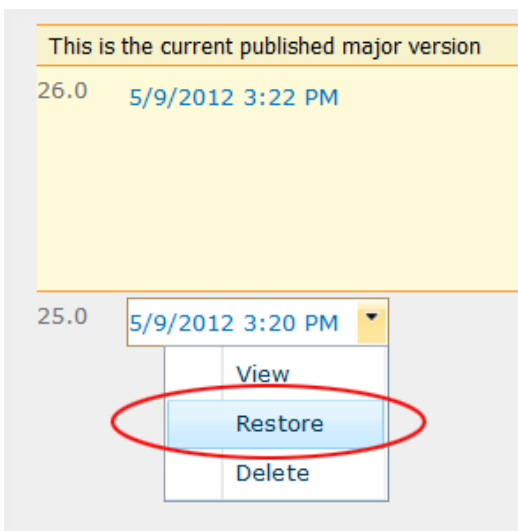
To view Page History,

- Select the **Page** tab on the ribbon
- Select **Page History**
- On the **Page History** page, click on the **Version History** option.



To restore a previous version,

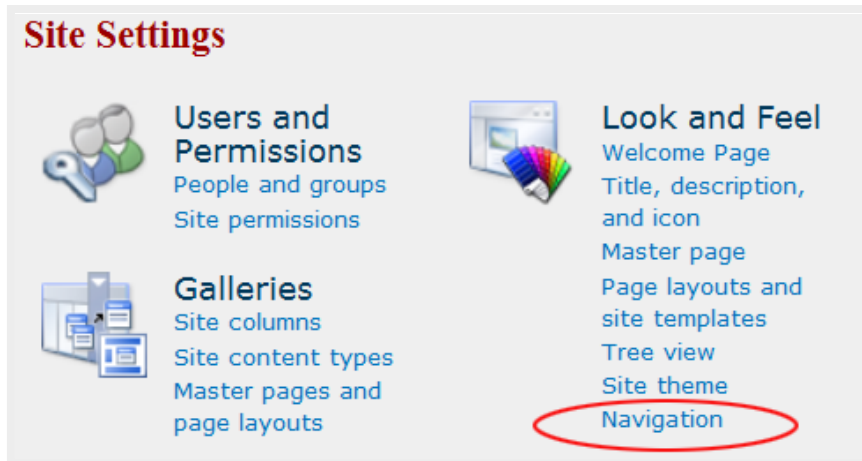
- Select Restore from the dropdown menu.



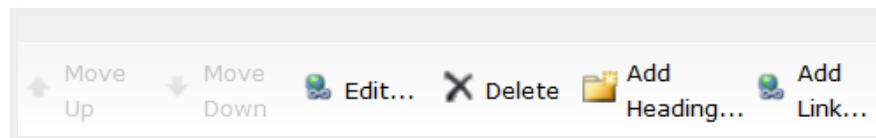
It is important to know how to access the version history for your page should you need to revert back to a previous version.

14. Modifying Navigation

- From the Site Actions, select Site Settings
- Under Look and Feel, select Navigation to open the Navigation Settings page.



You can do the following modifications:



- Show/hide global and current navigation links
- Sort links automatically or manually
- Move links up and down (links on the current navigation are set to be sorted manually)
- Edit links and headings
- Add/Delete links and headings

Note:

- The **Edit** and **Delete** options are not available for a link that is populated automatically on the current navigation when you create a new page, or new subsite.
- The **Edit** and **Delete** options are available for links that are manually added to the current navigation.

Current navigation:

Show subsites & Show Pages

- With the "Show Pages" option checked, a link to a new page is automatically added to the current navigation bar when you create it. The corresponding link will be automatically removed from the left navigation bar when you delete a page.

- With the **Show Pages** option unchecked, links are not populated automatically on the current navigation when you create new pages. Then, you have to add links manually using **Add Link...** in **Navigation Editing and Sorting** section. In this case, you should add a **Home** link to go back to the home page.

Show subsites option works the same way.

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15. File Naming Convention

Avoid using spaces for subsite names and file names.

Spaces will be replaced by %20 and display an unfriendly URL:

<http://www.sac.edu/Training/WebUser/Documents/Brief%20Course%20Lab%20Guide.pdf>

Replace spaces with underscores (_) , dashes (-) or use no-space compound word with camel case

Web pages:

<http://www.sccollege.edu/Departments/Testing/Pages/CoursePrerequisiteClearance.aspx>

<http://www.sccollege.edu/Departments/Testing/Pages/Course-Prerequisite-Clearance.aspx>

http://www.sccollege.edu/Departments/Testing/Pages/Course_Prerequisite_Clearance.aspx

Documents:

<http://www.sac.edu/Training/WebUser/Documents/BriefCourseLabGuide.docx>

<http://www.sac.edu/Training/WebUser/Documents/Brief-Course-Lab-Guide.docx>

http://www.sac.edu/Training/WebUser/Documents/Brief_Course_Lab_Guide.docx

Naming convention for website: no-space and camel case

Website: <http://www.sccollege.edu/Departments/AcademicSenate/>

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16. Creating Websites

Each web site created under a parent site is called a “subsite” or website.

- Select **New Site** from **Site Actions**
- Select **Publishing Site**

- Click on **More Options**

The screenshot shows the 'Site Actions' menu on the left, with the 'New Site' option highlighted by a red box. A red arrow points from this option to a central 'Publishing Site' icon. Another red arrow points from the icon to the 'More Options' button on the right-hand configuration page. The configuration page includes a search bar, a description of the 'Publishing Site' type, and input fields for 'Title' and 'URL name'. The 'More Options' button is circled in red.

- In **Create** window, enter **Site Title** and **URL** (follow naming convention)
- Keep default permissions (*Use same permissions as parent site*)
You can break parent permissions inheritance later if needed.
- Click **Create**

Title and Description

Type a title and description for your new site. The title will be displayed on each page in the site.

Title:

Description:

Web Site Address

Users can navigate to your site by typing the Web site address (URL) into their browser. You can enter the last part of the address. You should keep it short and easy to remember.

For example, <http://www.sac.edu/Training/We.../sitename>

URL name: <http://www.sac.edu/Training/We.../>

Permissions

You can give permission to access your new site to the same users who have access to this parent site, or you can give permission to a unique set of users.

User Permissions:

Use unique permissions
 Use same permissions as parent site

Note: If you select "Use same permissions as parent site", one set of user permissions is shared by both sites. Consequently, you cannot change user permissions on your new site unless you are an administrator of this parent site.

Navigation Inheritance

Specify whether this site will have its own top link bar or use the one from its parent.

Use the top link bar from the parent site?
 Yes No

Go back to the parent site and select **Site Actions > View All Site Content**. The new site appears under **Sites and Workspaces**.

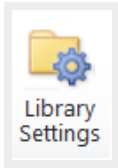
Each subsite

- possesses all the features of a parent site.
- can inherit its parent permissions or have its own.
- can show parent navigation links or only its own navigation.
- can be made public or private.
 When it is private, only permitted users have access.

Pages Library Settings

- Open the **Pages** library and select the **Page** tab on the ribbon

- Click on **Library Settings** on the right hand side of the ribbon



- Under **General Settings**, select **Versioning Settings** to open the **Pages Library Settings** page.
 - **Content Approval** is disabled by default. The **No** option should be checked.
Note: If your site is assigned to a contributor and needs the site owner's approval to publish a page, you can enable the content approval by checking **Yes**.
 - **Document Version History**
Set the number of major and minor versions you want to keep.
 - **Required Check Out**
Check **YES**
 - to prevent multiple people from making changes at the same time.
 - so team members can add a comment to keep track what has changed in each version.
 - to enable the "Discard Check Out" option, which allows you to discard the changes you have made to your checked out version.

Note: You can override a page checked out page by another user, but this will override all the changes that user has made.

Pages Library Settings:

Content Approval	Require content approval for submitted items? <input type="radio"/> Yes <input checked="" type="radio"/> No
Document Version History	Create a version each time you edit a file in this document library? <input type="radio"/> No versioning <input type="radio"/> Create major versions Example: 1, 2, 3, 4 <input checked="" type="radio"/> Create major and minor (draft) versions Example: 1.0, 1.1, 1.2, 2.0 Optionally limit the number of versions to retain: <input checked="" type="checkbox"/> Keep the following number of major versions: <input type="text" value="5"/> <input checked="" type="checkbox"/> Keep drafts for the following number of major versions: <input type="text" value="5"/>
Draft Item Security	Who should see draft items in this document library? <input type="radio"/> Any user who can read items <input checked="" type="radio"/> Only users who can edit items <input type="radio"/> Only users who can approve items (and the author of the item)
Require Check Out	Require documents to be checked out before they can be edited? <input checked="" type="radio"/> Yes <input type="radio"/> No

Deleting a website

A SharePoint site is deleted from inside itself.

- Open the website you want to delete
- Go to **Site Settings**
- Under **Site Actions**, click on **Delete this site**

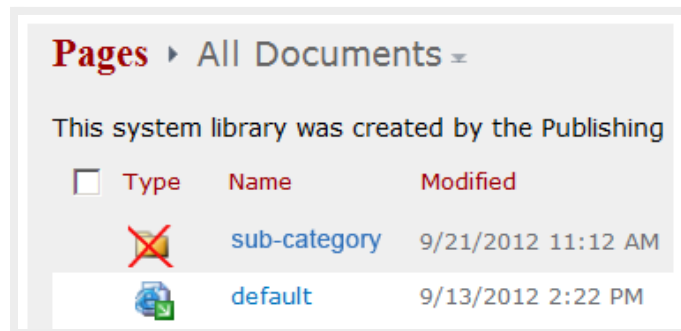
Note: In SharePoint 2010, a deleted site is not permanently deleted. It is stored in the **Site Collection Recycle Bin** and can be restored by ITS web administrator.

When do you create a new subsite?

To group web pages of the same category, you should create a **subsite**, not a sub-folder under the **Pages Library**.

In SharePoint, newly created web pages cannot go to a folder.

When you open a folder under the **Pages Library** and create a new web page, it is automatically placed at the same level of the *default.aspx* page, at root level of the **Pages Library**. It is not placed inside the folder.



A folder under the Pages Library can be used to store uploaded stand-alone web pages you want to link to your SharePoint Pages.

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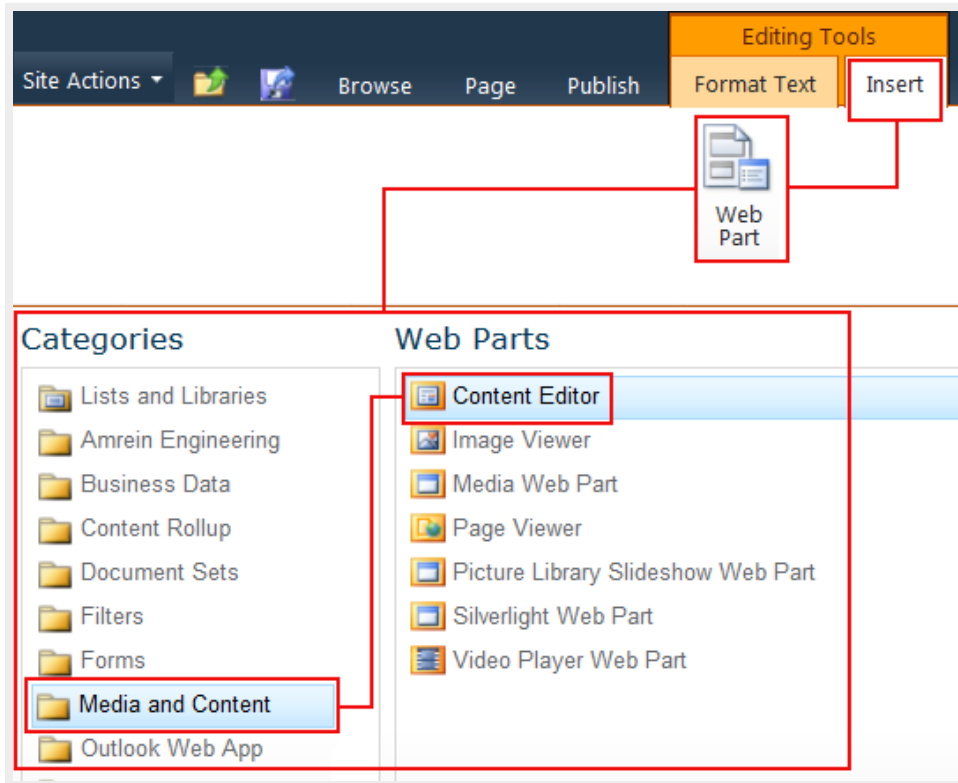
16. Inserting a Web Part

Web Parts are used to display contents that are not supported by the Page Content editor (SharePoint lists and libraries, JavaScript, form, video, external web page ...)

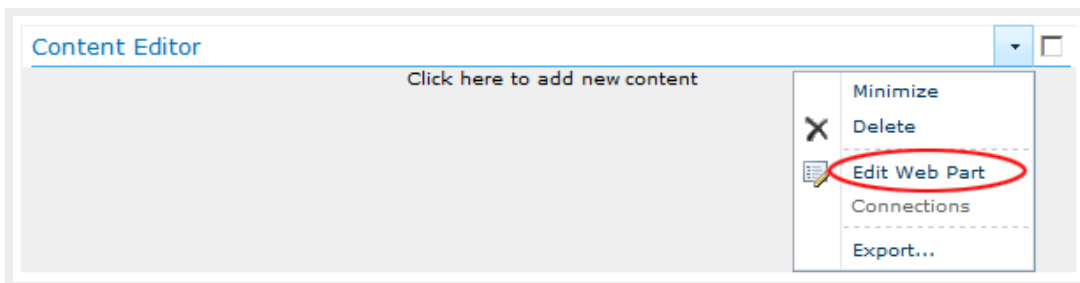
In SharePoint 2010, you can insert a web part anywhere in the page content.

To insert a Web Part:

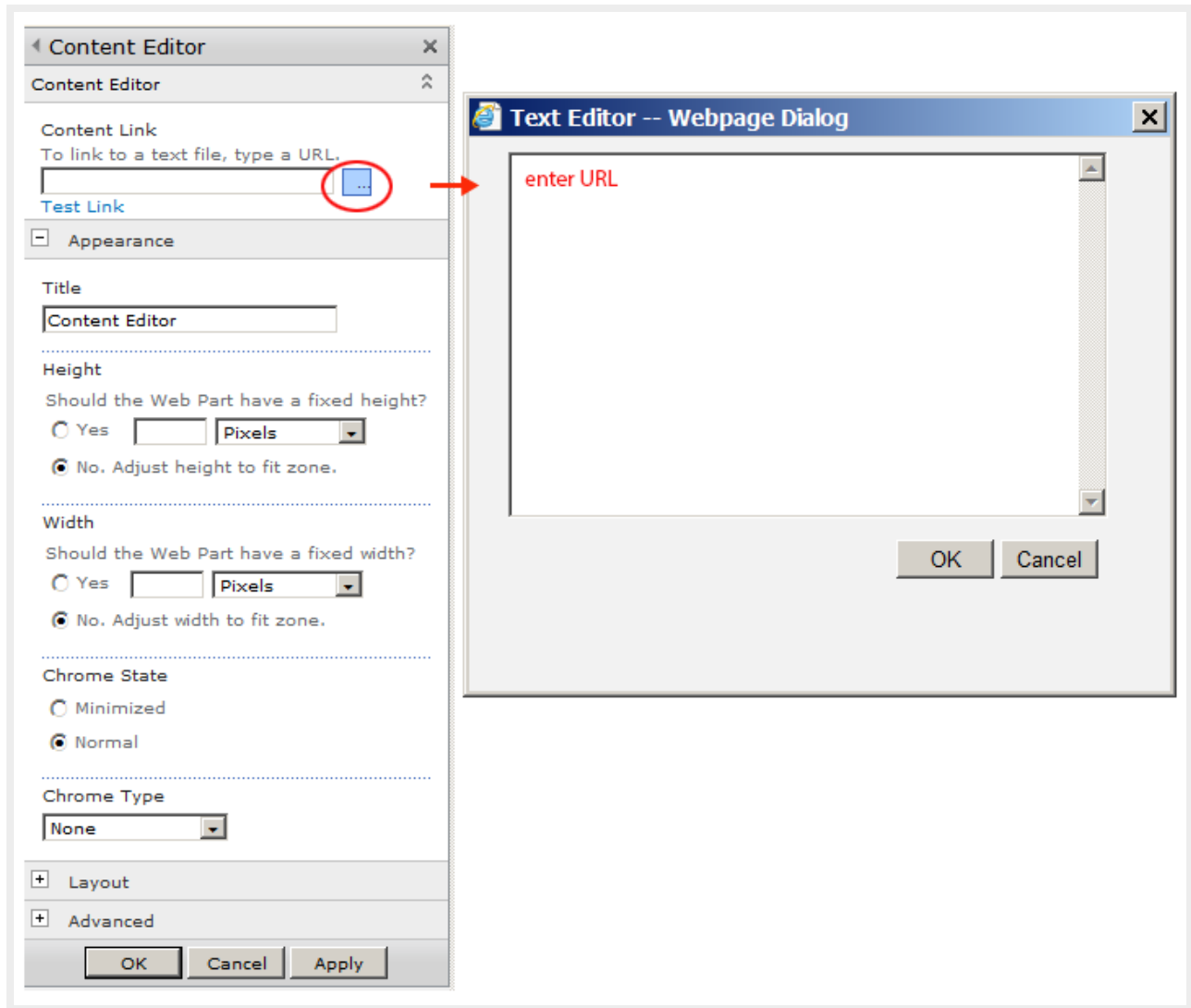
- Place the cursor at the location you want to add the Web Part
- Select **Insert** tab on the ribbon
- Click on **Web Part**
- Select a Web Part from a category and click on the **Add** button



To open the Web Part editor, select "Edit Web Part" from the edit dropdown menu on the right hand side.



Content Editor Web Part editor:



Note: select None for Chrome Type to hide the title bar and border of the Web Part frame.

Most commonly used Web Parts:

- Lists and Libraries Web Parts: **Picture library, Calendar, Announcement, Survey**
- Media and Content **Web Parts:**
 - **Content Editor Web Part** allows authors to type directly to the WebPart content area, or link to existing content by entering a hyperlink to a text file that contains HTML source code
 - **Page Viewer Web Part** displays another Web page on this Web page (e.g. display an HTML form or an external web page.)
 - **Picture Library Slide Show** displays a slideshow of images and photos from a picture library.
- **SectorPoint Ad Rotator Web Part** displays rotating images from an image library.

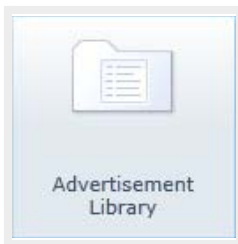
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18. SectorPoint Ad Rotator Web Part

Images used for the Ad Rotator are stored in a picture library. However, you should store them in an **Advertisement Library**, not a **Picture Library**, because the **Advertisement Library** allows adding a hyperlink to each image if needed. There is no option for adding a hyperlink to an image in a **Picture Library**.

Step 1 - Creating an Advertisement Library

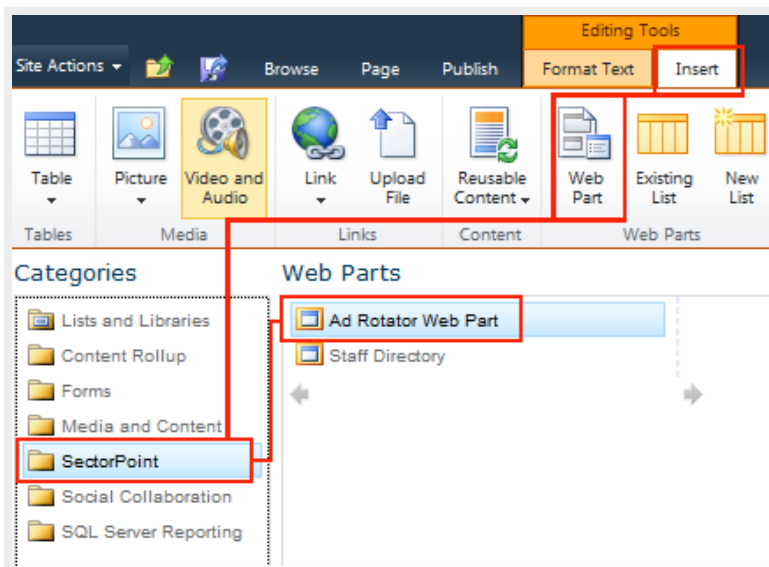
- Under **Site Actions** menu, select **More Options**
(another way: go to All Site Content and click on Create)
- In the **Create** window, select **Advertisement Library** and name it



- Upload images to the advertisement library
- Double click on each image to open the image properties window
- Edit the image properties and add URL if needed.

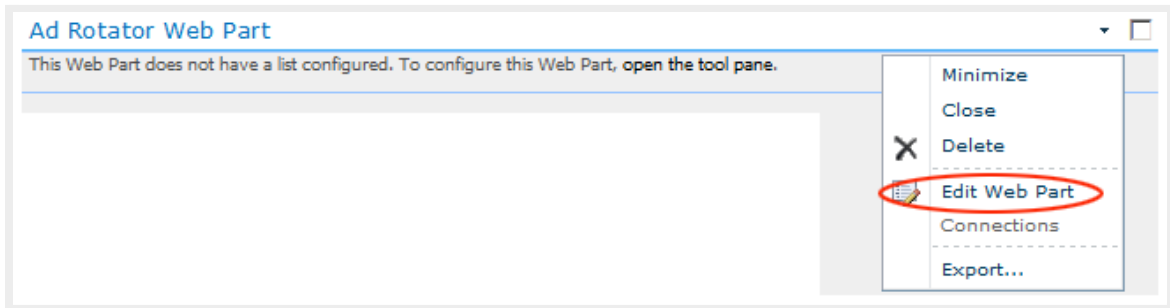
Step 2 - Adding an Ad Rotator Web Part to a web page

- Place your cursor at the location you want to add the Ad Rotator Web Part
- Select **Insert** tab
- Select **Web Part > SectorPoint > Ad Rotator Web Part**

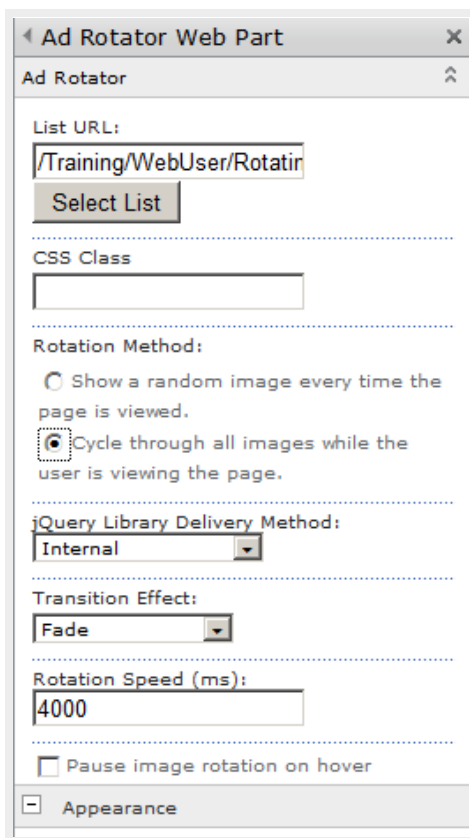


- Click **Add** button

- The Ad rotator web part is added to the page
 - Select **Edit Web Part** from the dropdown (on top right) to open the Ad Rotator Web Part editor



- Click on **Select List** button and browse to the existing Advertisement Library
- Check the option *“Cycle through all images while the viewer is viewing the page.”* (You can choose to show a random image.)
- The *“Fade”* transition effect is set by default



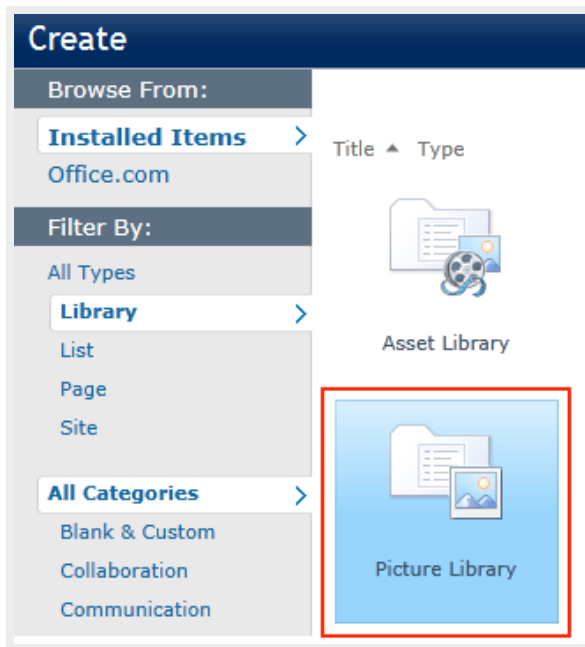
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19. Picture Gallery Slideshow Web Part

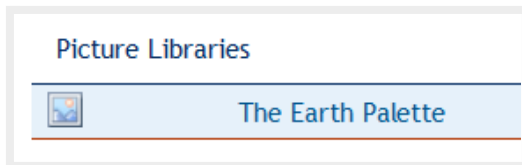
Before creating Picture Gallery Slideshow you need to have an existing picture gallery

Creating a Picture Library

- Go to **Site Actions > More Options...**
- Select **Library** tab, select **Picture Library** and name it (e.g. *The Earth Palette*)



- The newly created picture library appears under **Picture Libraries** heading in **All Site Content**

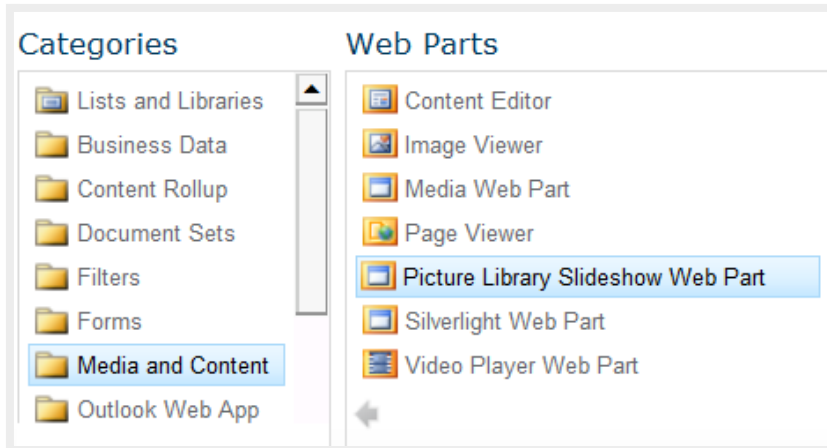


- Upload photos to the picture gallery
- Double click on each photo to open the image properties window
- Add title and description

Creating a Picture Gallery Slideshow

- Go to **Site Actions, Edit Page**
- Place the cursor at the location you want to insert the Web Part
- Select **Editing Tools > Insert > Web Part** from the ribbon

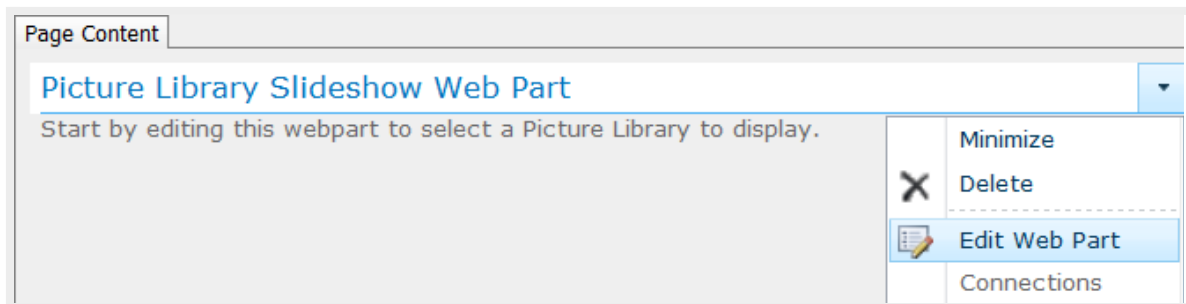
- In the **Categories**, select **Media and Content** > **Picture Library Slideshow Web Part**



- Click on **Add**

Editing Picture Library Slideshow Web Part

- Select **Edit Web Part** from the dropdown menu

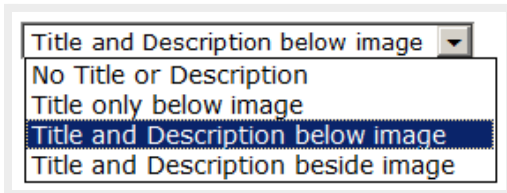


- Web Part configuration:

The screenshot shows the configuration settings for the 'Picture Library Slideshow Web Part'. The settings are as follows:

- Duration to Show Picture (seconds): 5
- Picture Library: The Earth Palette
- Library View: All Pictures
- Picture Display Mode: Random Order
- Display with: Title and Description below image
- Show Toolbar

- **Duration to Show Picture (seconds)**
Enter the amount of seconds before a new picture will appear.
- **Picture library**
Select the picture library name from the dropdown if there are more than one.
- **Library view**
Select the view.
- **Picture Display Mode**
Show the pictures in random or sequential order.
- **Display with**
Options to display title and description.

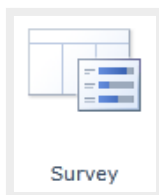


- **Show toolbar**
Navigate to the next or previous picture or stop the slideshow.
- << [View Picture Library Slideshow sample](#) >>

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20. Creating a Survey

- Go to the site you want to create the survey
- Select **Site Actions > More Options...**
- In **Create** page, select **Survey**



- Another way:
 - Select **Site Actions > View All Site content**
 - Click on **Create** icon, and select **Survey**

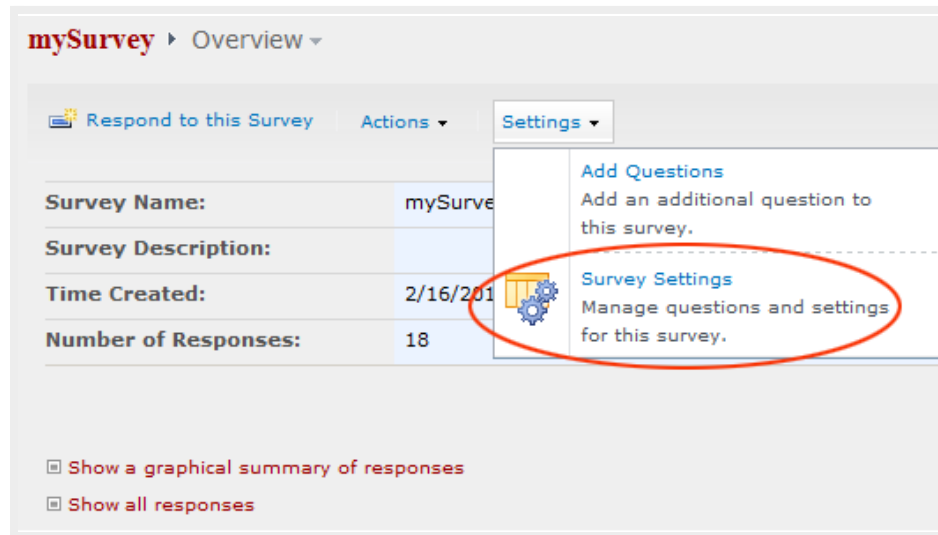
- Enter survey name and description, select navigation option, survey options and click OK

Name and Description	
Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this survey.	Name: <input type="text"/>
	Description: <input type="text"/>
Navigation	
Specify whether a link to this survey appears in the Quick Launch.	Display this survey on the Quick Launch? <input type="radio"/> Yes <input checked="" type="radio"/> No
Survey Options	
Specify whether users' names will appear in survey results and whether users can respond to the same survey multiple times.	Show user names in survey results? <input type="radio"/> Yes <input checked="" type="radio"/> No
	Allow multiple responses? <input type="radio"/> Yes <input checked="" type="radio"/> No

Survey Options:

- Check **No** to "Show user names in survey results" - to keep users anonymous
- Check **No** to "Allow multiple responses" - users cannot take the survey a second time
- In **New Question** page:
 - Create your survey question
 - Click **Next Question** to create more questions
 - Click **Finish** when all questions are done
- In **All Site Content**, the new survey appears under the **Surveys** heading

Survey Setting



In the survey overview page, select **Survey Settings** under **Settings** menu.

Under **Questions** heading,

- you can add a new question
- click on an existing question to edit or delete it

By default, the link to survey takes to the Survey Overview page ([overview.aspx](http://www.rscdd.edu/WebPublishingManual/Lists/SurveySample/overview.aspx)).

To go directly to the survey questions, the survey link should point to the [NewForm.aspx](http://www.rscdd.edu/WebPublishingManual/Lists/SurveySample/NewForm.aspx) page.

After a user has completed the survey and click **Finish**, the Survey Overview page will return automatically. You can format the survey link to return a thank you page, but it does not work for all browsers.

SharePoint survey was not built for anonymous access. You can enable anonymous access on the list, but there are problems associated with it. A major problem is that you cannot restrict the number of times an anonymous user may complete the survey.

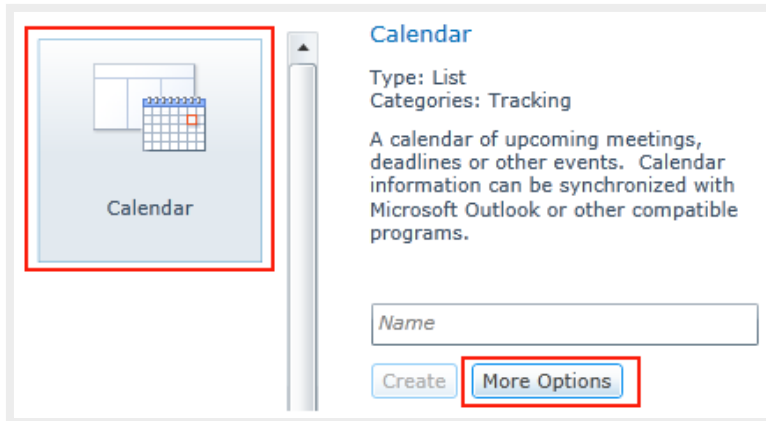
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21. Calendar

Creating a new calendar:

- Select **Site Actions > More Options**
OR
Site Actions > All Site Content > Create

- Select the Calendar list icon and click on More Options



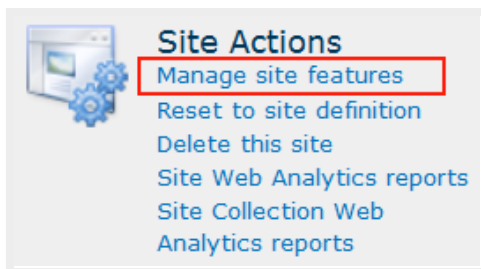
- Enter the calendar name and description
- Select No to "Display this list on the Quick Launch" (you can add it manually if needed)
- Select No under "Use this calendar to share member's schedule" if you create an event calendar
- Click **Create**

Note:

If the calendar list does not appear on the **Create** window, this site does not have **Team collaboration Lists** activated.

Activating **Team collaboration Lists**:

- **Site Actions > Site Settings**
- Select **Manage Site Features** under Site Actions



- Activate **Team Collaboration Lists**



Adding a new event

In **All Site Content**, the newly created calendar appears under the **Lists** header.

To add an event to the calendar:

- Click on the calendar list to open it
- Select a date on the calendar
- On the ribbon, select **Calendar Tools** tab, select **Events** and click **New Event**.

Other methods to create a new event:

- Double click on the selected date on the calendar to open the **New Item** window
 - Mouse over the bottom right corner of a date cell and click on **+ Add**
- Enter **Title**, **Location**, **Start Time**, **End Time**, **Description** and select a **Category**

Title *	<input type="text" value="Annual Student Art Sale"/>
Location	<input type="text"/>
Start Time *	<input type="text" value="10/19/2012"/> <input type="text" value="2 PM"/> <input type="text" value="00"/>
End Time *	<input type="text" value="10/19/2012"/> <input type="text" value="5 PM"/> <input type="text" value="00"/>
Description	<div style="border: 1px solid gray; padding: 5px;"><p>A A B I U [List Icons] [Link Icon] [Undo Icon] [Redo Icon]</p><div style="border: 1px solid gray; height: 100px; width: 100%;"></div></div>
Category	<input checked="" type="radio"/> Department <input type="text" value=""/> <input type="radio"/> Specify your own value: <input type="text"/>
All Day Event	<input type="checkbox"/> Make this an all-day activity that doesn't start or end at a specific hour.
Recurrence	<input type="checkbox"/> Make this a repeating event.
Workspace	<input type="checkbox"/> Use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event.

- Leave the following options blank if it is a one-time event with a start and end time

All Day Event	<input type="checkbox"/> Make this an all-day activity that doesn't start or end at a specific hour.
Recurrence	<input type="checkbox"/> Make this a repeating event.
Workspace	<input type="checkbox"/> Use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event.

- If it is a repeating event, check **Recurrence** option "Make this a repeating event"

- Select a recurrence option and specify a pattern

Recurrence Make this a repeating event.


Daily
 Weekly
 Monthly
 Yearly


Pattern

Recur every week(s) on:

Sunday Monday Tuesday Wednesday
 Thursday Friday Saturday

Date Range

Start Date 

No end date
 End after: occurrence(s)
 End by: 


Recurrence Make this a repeating event.


Daily
 Weekly
 Monthly
 Yearly

Pattern

Day of every month(s)
 The of every month(s)

Date Range

Start Date 

No end date
 End after: occurrence(s)
 End by: 

Modifying Category list

- Open calendar
- Select **Calendar** tab from the ribbon
- Select **List Settings**
- Scroll down to **Columns**
- Click on **Category** link under **Columns** header
 In **Change Column** page, modify the category list under **Additional Column Settings** (edit/remove)

category, or add more category by typing each choice on a separate line)

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
 Yes No

Enforce unique values:
 Yes No

Type each choice on a separate line:

Display choices using:
 Drop-Down Menu
 Radio Buttons
 Checkboxes (allow multiple selections)

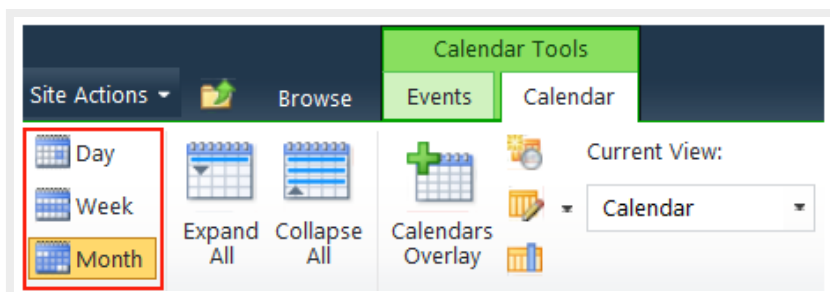
Allow 'Fill-in' choices:
 Yes No

Default value:
 Choice Calculated Value

Calendar views

Switching views using controls on ribbon:

- Select **Calendar** under **Calendar Tools** tab
 - **Month** is the default view
- Switch calendar to different views: **Day**, **Week** and **Month**



Switching views on a calendar list page:

- **Day view**: click on the date number

- **Week view** : click on the left side bar of each week
- Refresh the page to go back to the default **Month view**

All Arts Events ▸ Calendar ▾

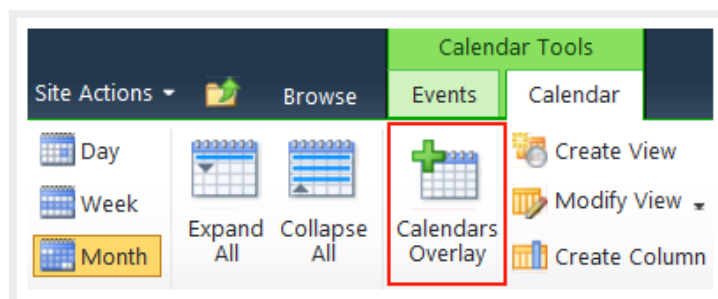
◀ ▶ December, 2012

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
week view	25	26	27 day view	28	29	30	1
			10:30 am - 8:0 ANNUAL HOLID	10:30 am - 8:0 ANNUAL HOLID	10:00 am - 4:0 ANNUAL HOLID	8:00 pm - 11:0 Music: BIG BAF	
	2	3	4	5	6	7	8
	2:30 pm - 5:00 Music: CONCEP				8:00 pm - 10:3 Music: 'DON' M	7:00 pm - 10:0 Dance: STUDIK	8:00 pm - 10:3 Music: SANTA /
	9	10	11	12	13	14	15
							+ Add
	16	17	18	19	20	21	22
	23	24	25	26	27	28	29
	30	31	1	2	3	4	5

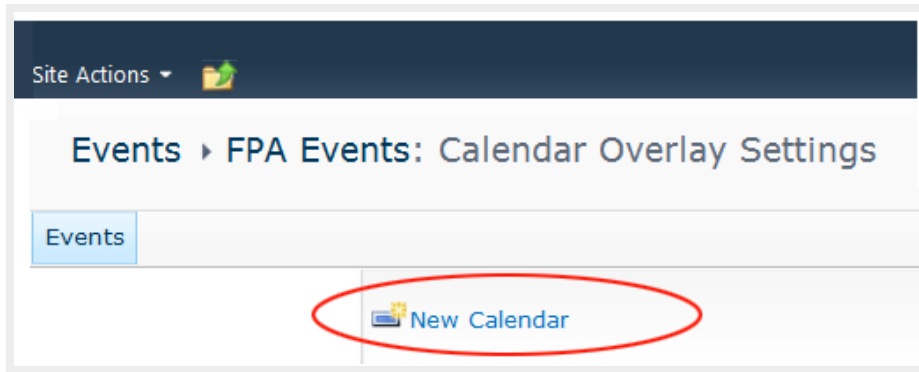
Aggregating multiple SharePoint calendars into a single view

Calendar overlay is a feature in SharePoint that we can use to aggregate information from multiple sources into calendar view. You can add up to 10 overlays to an existing calendar view. Please note that if you connect the calendar to Outlook to synchronize the events, it will only synchronize items from main view and not from the overlays.

1. Create a **master calendar**, e.g. FPA Events
2. Open the master calendar, select the **Events** tab under **Calendar Tools** and click on **Calendars Overlay**



3. Click on **New Calendar** to add a calendar to the view



4. Provide information about the calendar you want to add.
 - Enter the correct calendar name
 - Select a background color for this calendar to display on the master calendar
 - **Web URL:** Enter the website address where the calendar is located
 - Click on the **Resolve** button to populate the **List** and **List view**
 - Select the right calendar from the dropdown if there are more than one in that website

A screenshot of the "Calendar Overlay Settings" form. The form is divided into two main sections: "Name and Type" and "Calendar Overlay Settings".
In the "Name and Type" section, the "Calendar Name" field contains "Music Events". The "The type of calendar is:" section has "SharePoint" selected with a radio button, and "Exchange" is unselected.
In the "Calendar Overlay Settings" section, the "Description" field is empty. The "Color" field is set to "Light Yellow, #fef8d6" with a color swatch. The "Web URL" field contains "http://sac.edu/Music/Events" and a "Resolve" button is visible below it. The "List" dropdown is set to "Music Events" and the "List View" dropdown is set to "Calendar". At the bottom, the "Always show" checkbox is checked.

- Repeat step 2 and 3 again to add more calendars to the view

- Calendar overlay example:

The image shows a calendar overlay for October 2012. The calendar is organized by week, with days of the week as columns and dates as rows. A yellow header for each week reads "Art: JONH CEDERQUIST-Pictorial Illusions; Exhibit Dates".

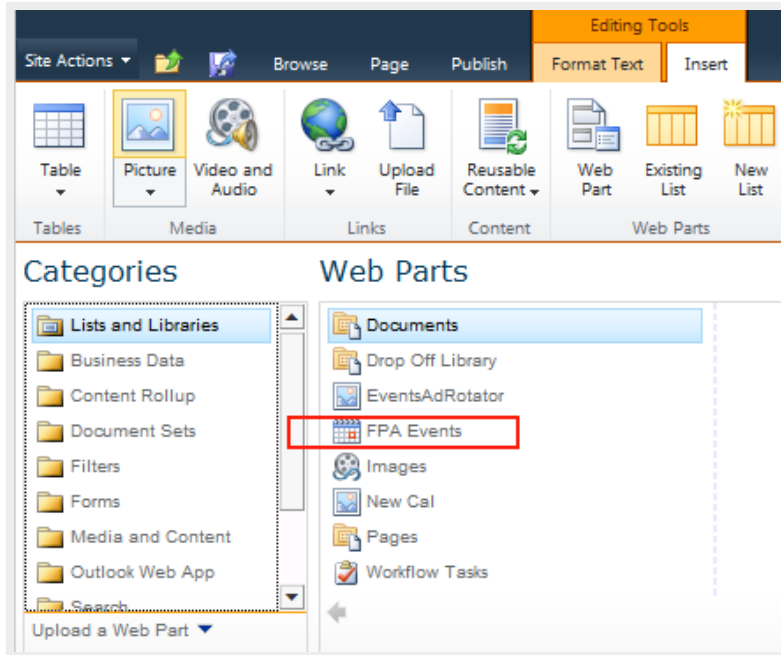
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	1	2	3	4	5	6
Art: JONH CEDERQUIST-Pictorial Illusions; Exhibit Dates						
	2:00 pm - 4:0 TLC Meeting	1:30 pm - 3:0 SAC Planning & Budget mee	11:00 am Spi 7:00 pm Wo	2:30 pm - 4:0 CANCELLED-T AG Meeting	10:00 am Wo 3:00 pm Wo	8:00 am Wre 1:00 pm Foot
					▼ 1 more item	▼ 1 more item
7	8	9	10	11	12	13
Art: JONH CEDERQUIST-Pictorial Illusions; Exhibit Dates						
	11:00 am Wo 11:15 am Int	11:30 am Job 1:30 pm Acad	9:00 am Coll 2:00 pm IE&A	9:00 am Dea 11:30 am Re	9:00 am Club 3:00 pm Wo	8:00 pm - 10: Theatre: AME RIGAN SOLDE
	▼ 3 more item	▼ 1 more item		▼ 3 more item	▼ 2 more item	
14	15	16	17	18	19	20
Art: JONH CEDERQUIST-Pictorial Illusions; Exhibit Dates						
2:30 pm - 4:3 Theatre: AME RIGAN SOLDE	1:00 pm Res 2:00 pm TLC	9:00 am Joint 11:30 am Int		10:15 am Gre 11:30 am Int	Last date t 1:30 pm SAC	1:00 pm Foot 8:00 pm The
	▼ 1 more item	▼ 3 more item		▼ 1 more item	▼ 1 more item	
21	22	23	24	25	26	27
Art: JONH CEDERQUIST-Pictorial Illusions; Exhibit Dates						
2:30 pm - 4:3 Theatre: AME RIGAN SOLDE	12:00 am Sec 11:00 am Job	10:00 am STE 11:00 am STE	9:00 am Coll 9:30 am STE	9:00 am Dea 10:00 am Col	12:00 pm Mo 3:00 pm Men'	
	▼ 4 more item	▼ 4 more item	▼ 8 more item	▼ 5 more item	▼ 1 more item	
28	29	30	31	1	2	3
Art: JONH CEDERQUIST-Pictorial Illusions; Exhibit Dates					3:00 pm Wo	
	11:30 am Int 2:00 pm TLC	1:00 pm Men'	11:00 am Hal 7:30 pm Wre	10:00 am Car 2:30 pm The	7:00 pm Wo 8:00 pm The	
	▼ 1 more item			▼ 1 more item		

Displaying a calendar on a web page

A calendar can be displayed on a web page using Web Part.

- Open the web page in editing mode
- Place the cursor in the page content area
- Select Insert > Web Part (or Insert > Existing List)

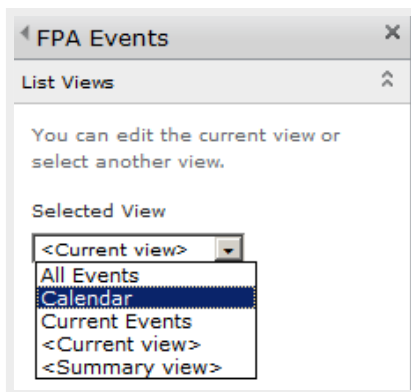
- Select the existing calendar list (e.g. FPA Events) under **Web Parts** column



The overlaid calendars are not populated on the master calendar automatically after it has been inserted to the web page.

To display overlaid calendars in Web Part:

- Select **Edit Web Part** to open the Web Part Editor.
- Under **Selected View**, select **Calendar** from the dropdown list



- Under **Appearance**, select **Chrome Type: None**
- Click **OK**

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22. Site Permissions

Each web site created under a parent site should inherit the parent site permissions.

Permissions

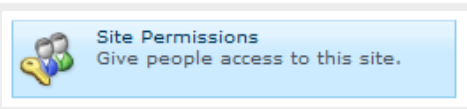
You can give permission to access your new site to the same users who have access to this parent site, or you can give permission to a unique set of users.

User Permissions:

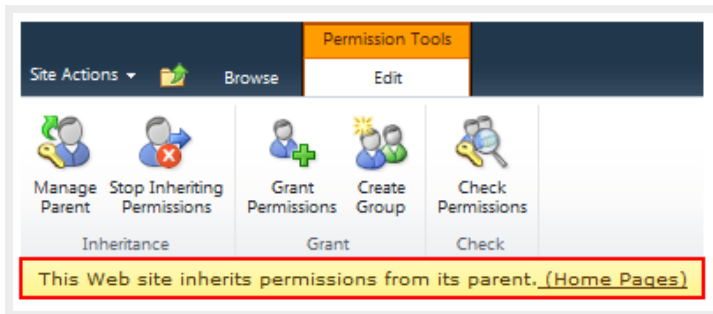
- Use unique permissions
 Use same permissions as parent site

Note: If you select "Use same permissions as parent site", one set of user permissions is shared by both sites. Consequently, you cannot change user permissions on your new site unless you are an administrator of this parent site.

Under **Site Actions**, select **SitePermissions**



The status bar shows "This web site inherits permissions from its parents".



Permitted users inherited from parent site:

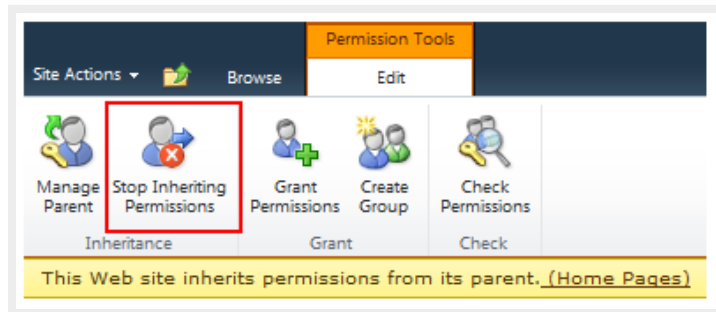
Anonymous Users	Anonymous Users	Entire Web site
Approvers	SharePoint Group	Approve
Designers	SharePoint Group	Design, Limited Access
Faculty & Staff Members	SharePoint Group	Contribute
Faculty & Staff Owners	SharePoint Group	Full Control, Limited Access
Faculty & Staff Visitors	SharePoint Group	Read
Hierarchy Managers	SharePoint Group	Manage Hierarchy
Oropeza, Alfonso (RSC\oropeza_alfonso)	User	Full Control

A website is maintained by its own web owners and contributors. Web owners and contributors of a website only have access permission to their own website and subsites created under their site. They cannot access another website if they are not added to that site permissions.

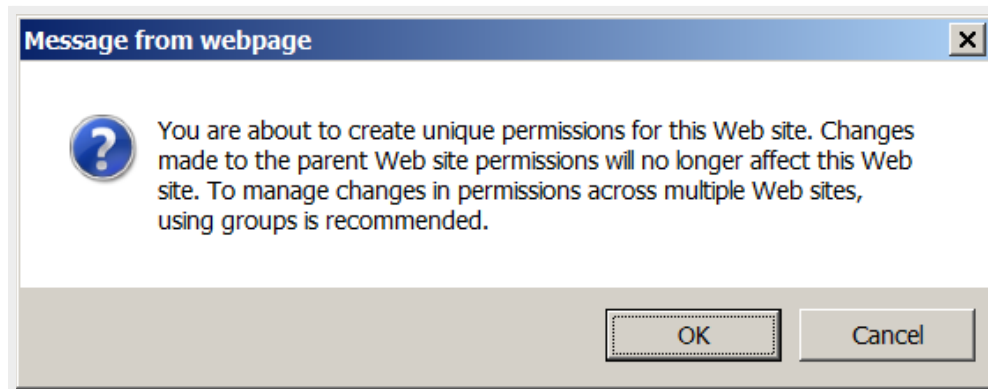
Note: Only owners of the website with **Full Control** can manage the site permissions.

Creating unique permissions for a subsite

When a child site needs its unique permissions, it should stop inheriting permissions from its parent. In **Site Permissions** page, click on "Stop Inheriting Permissions" link on the ribbon.

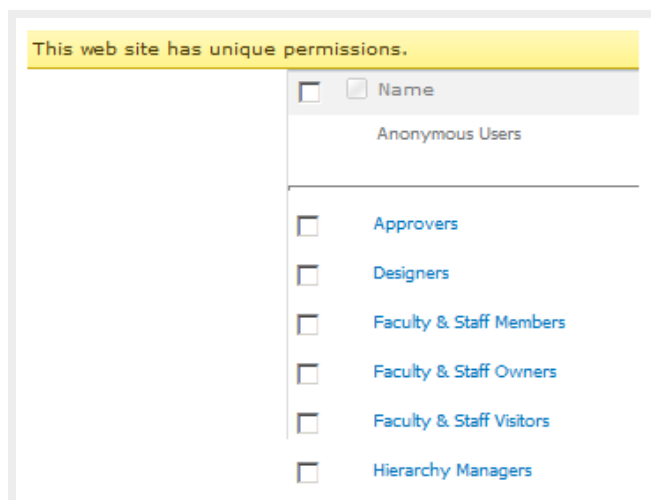


A message is returned, saying this site now has unique permissions and changes made to the parent site will no longer affect it.



Click OK

Permission inheritance has been stopped, indicated by a checkbox appearing in front of each group name.

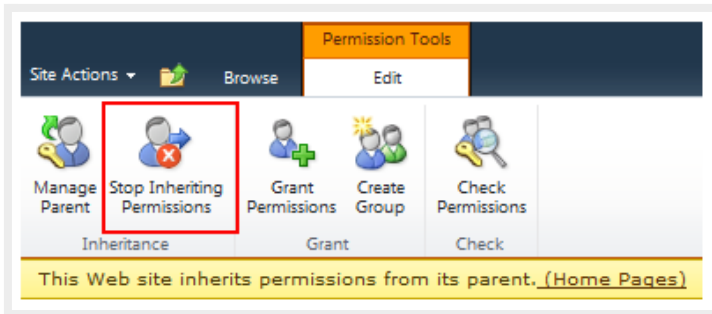


Now you can edit the site permission for each user or group, or add new ones.

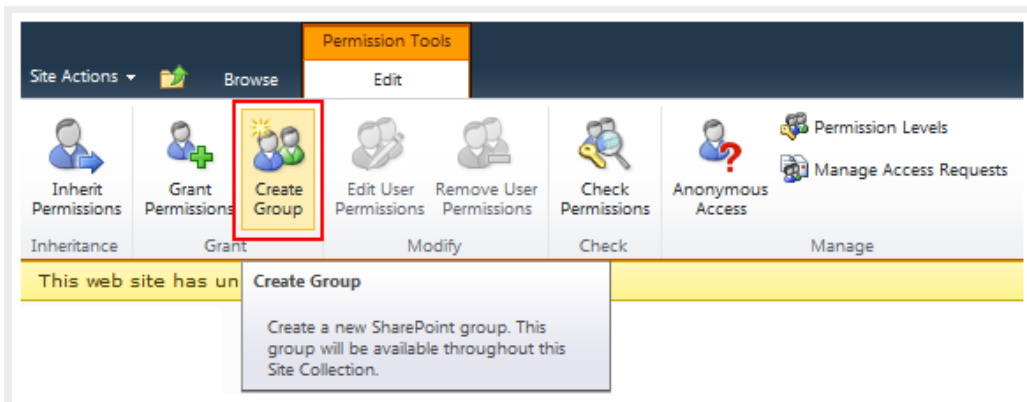
Creating a new permission group:

To create a permission group for a specific website:

1. Open that website
2. From **Site Actions**, select **Site Permissions**
3. Click on "Stop Inheriting Permissions" link on the ribbon



4. Click on **Create Group**



In **Create Group** page, enter:

- **Group name**
Naming convention: SiteName Permission
For example: PayRoll Owners, Research Contributors
Group name should be unique. You will get an error if you enter a group name that already exists.
- **Description** (optional)
- **Group owner** - If you create the group, your username is automatically populated in the Group Owner field, but you can change it to another username or another group name. Click the Check Names icon to verify it.
- **Group Settings** (keep the default: Group Members; Group Owner)
- **Membership Requests** (keep the default: No to both requests)
- **Give Group Permission to this Site**

- Check **Full Control** for site owners group, **Contribute** for contributors group
Note: When a site has contributors, the content approval workflow for that site should be enabled. Site contributors can edit web pages, create new pages but cannot publish them. Website owners need to approve the page and published it.

Choose the permission level group members get on this site:
<http://www.sac.edu/Training/WebUser>

Full Control - Has full control.

Design - Can view, add, update, delete, approve, and customize.

Contribute - Can view, add, update, and delete list items and documents.

Read - Can view pages and list items and download documents.

Approve - Can edit and approve pages, list items, and documents.

Manage Hierarchy - Can create sites and edit pages, list items, and documents.

Restricted Read - Can view pages and documents, but cannot view historical versions or user permissions.

View Only - Can view pages, list items, and documents. Document types with server-side file handlers can be viewed in the browser but not downloaded.

Records Center Web Service Submitters - Submit content to this site using Web Services.

- When you open a specific website and create a new permission group, but you don't check any check box to select a permission level, the newly created group has no access to this specific website. However, you can give it access to this website later (see Granting Permissions). In order to give a group access to a site where it is created, make sure you check a check box to select a permission level before clicking on **Create**.
- Note: Groups are **not** "owned" by any specific site. No matter where you create permission groups, they belong to the entire Web site. You can add an existing permission group to as many websites as needed.

After creating a new permission group, open **Site Permissions page** from the **Site Actions** menu. You will see the newly created permission group appear on the list.

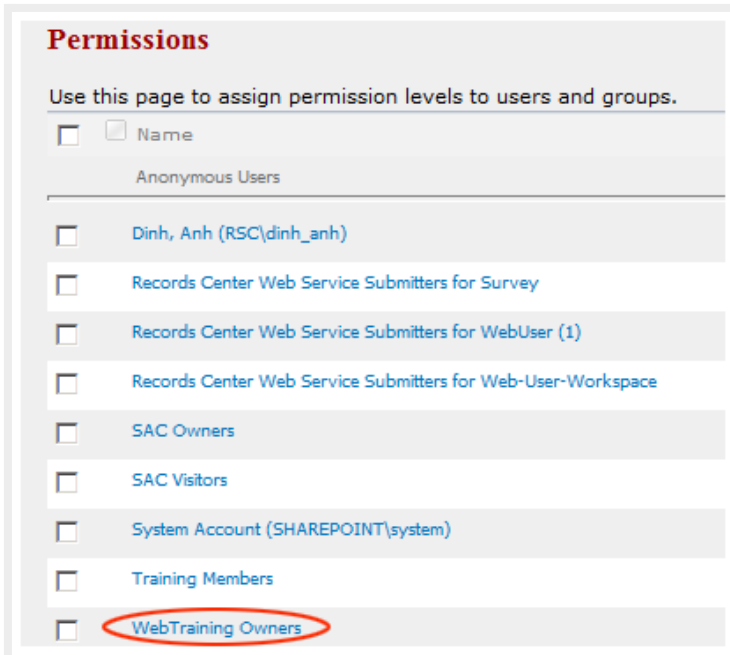
Adding Users to a permission group

Users of a group can access any site the group is added and inherit the same permission assigned to that group (Full Control, Contribute...)

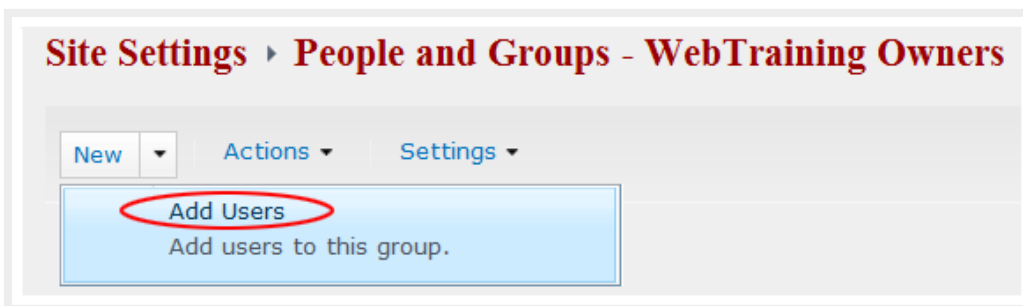
Right after you click on **Create**, the new group page opens and it is ready for adding users.

- From the **Site Actions** menu, select **Site Permissions** and double click on the group name to open the group page.

For example: *WebTraining Owners* with Full Control permission




- Select Add Users from the New menu



- Enter one username at a time and click on the check name icon to validate it. Sending welcome email to the new users is optional.

Users/Groups:

Dinh, Anh ; Tran, Trini ;

check name 

Send welcome e-mail to the new users

Subject:
Welcome to the SharePoint group: WebTraining Owners for site: Web


Personal Message:

OK Cancel

New users added to this group will inherit its Full Control permission to this specific site.

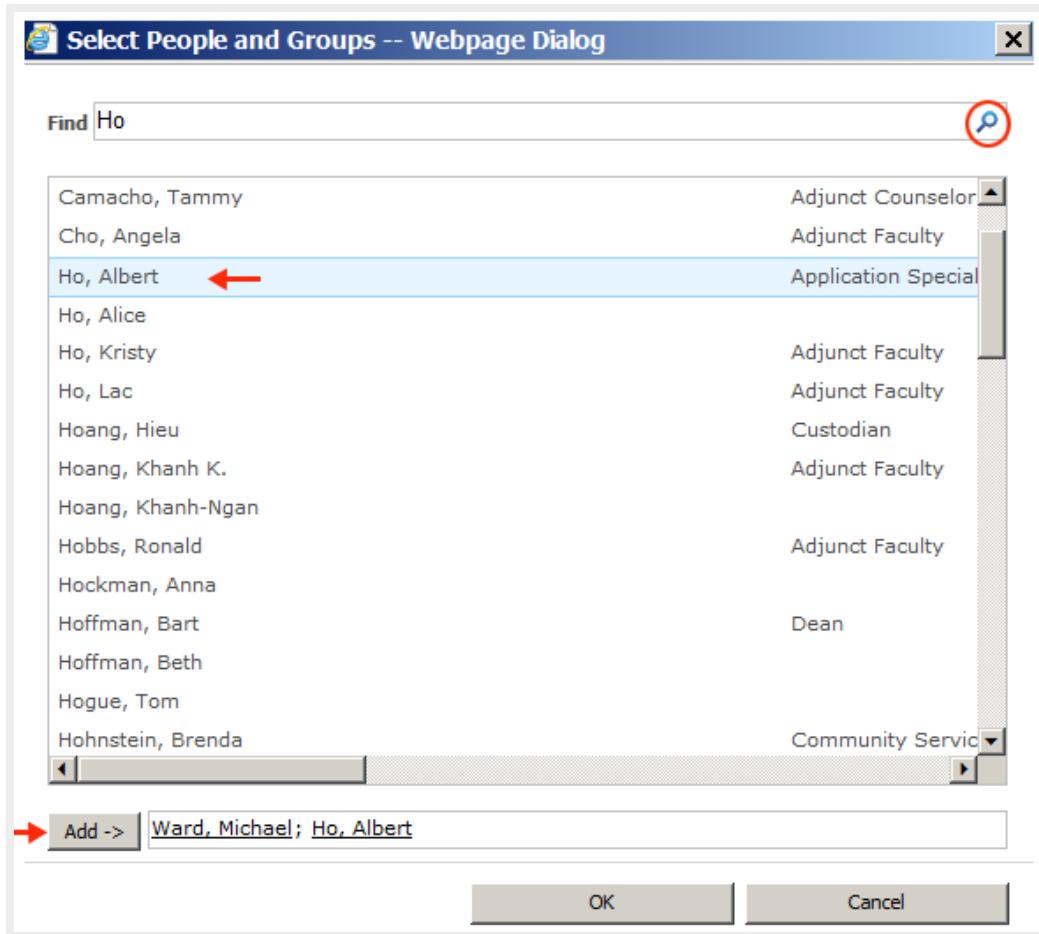
- You can also find users by clicking on the browse icon

Users/Groups:

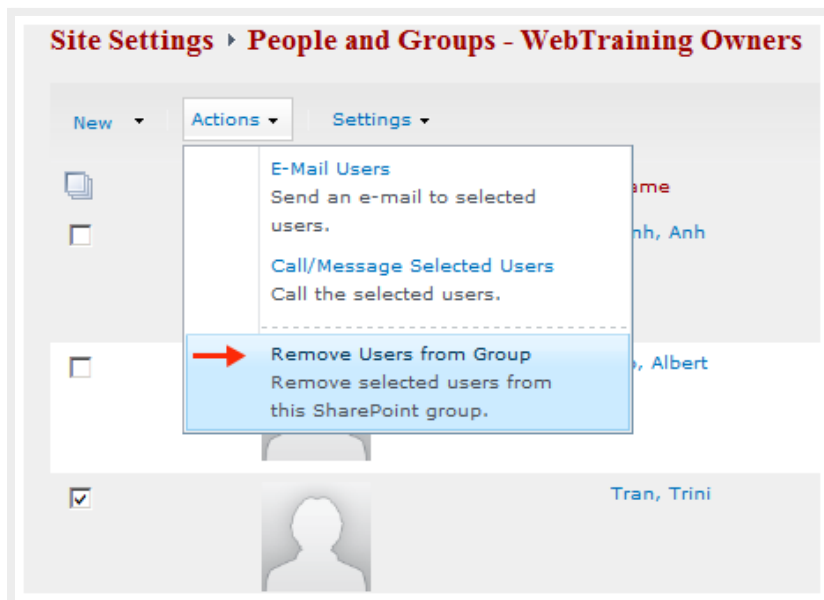


browse

Enter a search word, click on the search icon, select a correct username, and click Add->



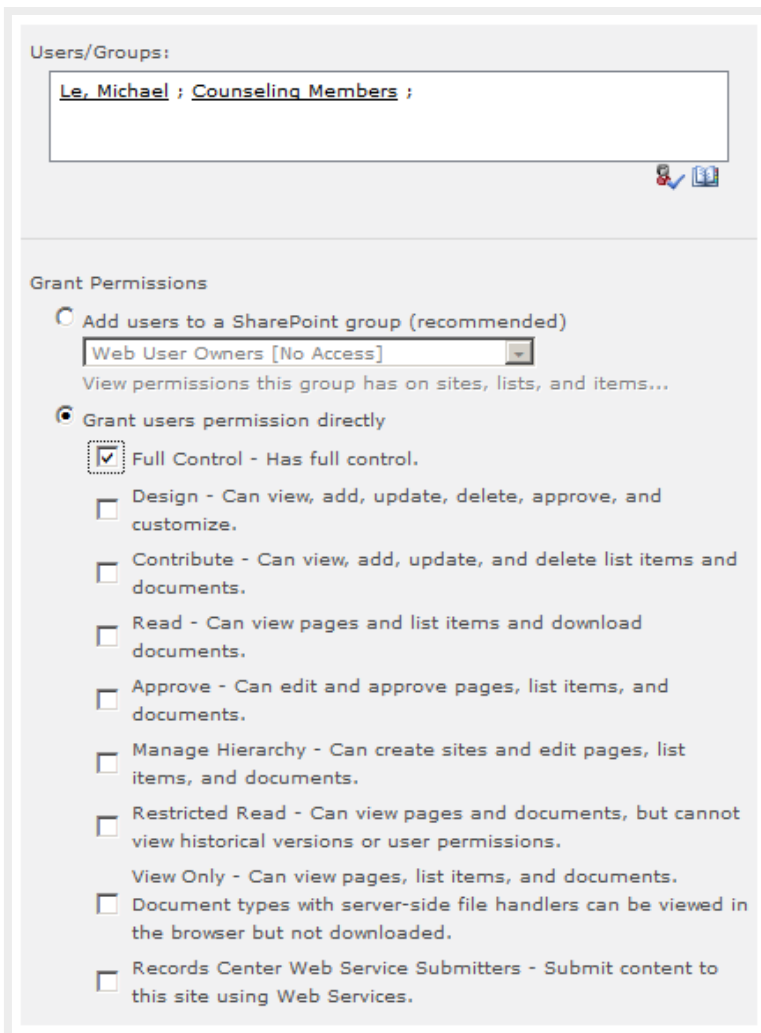
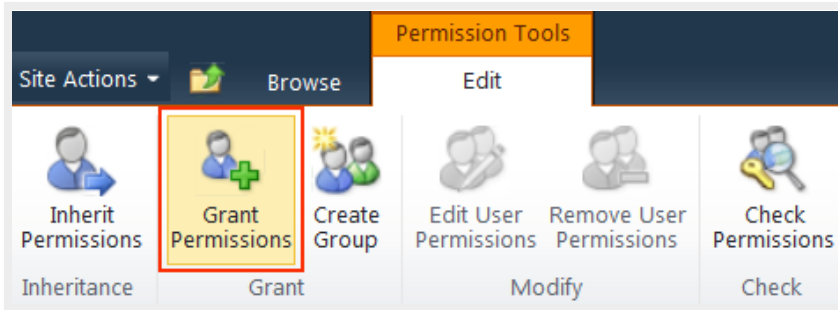
- To remove a user from a group:
 - Click on a check box to select a user
 - Select "Remove Users from Groups" from the Actions menu



Granting permissions to an existing group or a user

A site owner can grant editing permissions to a user or an existing group and assign a permission level for each.

- From **Site Actions** menu, select **Site Permissions**
- In **Site Permissions** page, click on **Grant Permissions** link on the ribbon

A screenshot of the 'Grant Permissions' dialog box in SharePoint. The 'Users/Groups' field contains the text 'Le, Michael ; Counseling Members ;'. Below this, there are two radio button options: 'Add users to a SharePoint group (recommended)' and 'Grant users permission directly'. The 'Grant users permission directly' option is selected. Under this option, there is a list of permission levels with checkboxes. The 'Full Control - Has full control.' option is checked. Other options include 'Design', 'Contribute', 'Read', 'Approve', 'Manage Hierarchy', 'Restricted Read', 'View Only', 'Document types with server-side file handlers can be viewed in the browser but not downloaded.', and 'Records Center Web Service Submitters - Submit content to this site using Web Services.'

- Enter the group name or username to **Users/Groups** field and click check name to validate it
- Select "Grant users permissions directly"

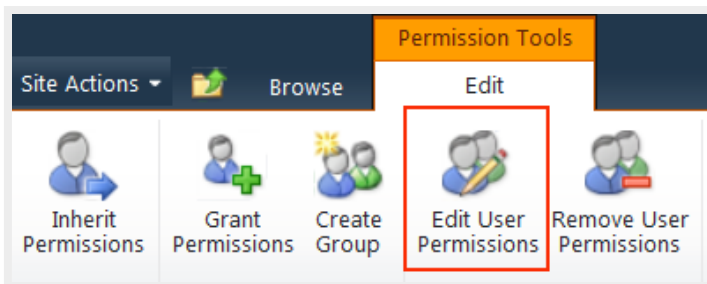
- Check a permission level
- Sending welcome email (optional)
- Click OK

The newly added group or user(s) now appear in the **Site Permissions** page. An existing group, or user, can be granted permissions to as many websites as needed.

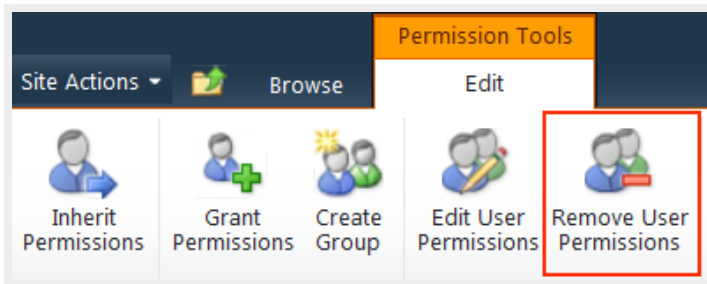
Edit / Removing Permissions

Web owner can edit or remove user permissions.

- To edit permissions: In **Site Permissions** page, select a username or group name, click on **Edit User Permissions**



- To remove permissions: In **Site Permissions** page, select a username or group name, click on **Remove User Permissions**



23. Anonymous Access

Anonymous access has been enabled by default. When you create a new site, it is recommended to select "*Use same permissions as parent site*". The newly created site should inherit anonymous access as well as all permission groups from its parent.

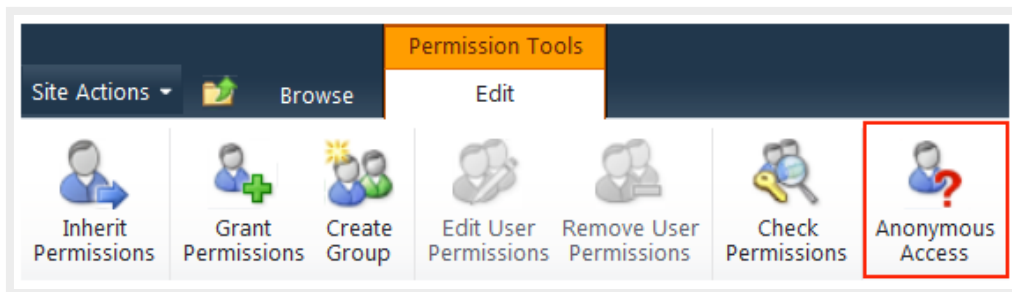
In **Site Permissions** page, **Anonymous Users'** permission is listed on top of other permitted users' groups.

Anonymous Users	Anonymous Users	Entire Web site
Approvers	SharePoint Group	Approve
Designers	SharePoint Group	Design, Limited Access
Faculty & Staff Members	SharePoint Group	Contribute
Faculty & Staff Owners	SharePoint Group	Full Control, Limited Access
Faculty & Staff Visitors	SharePoint Group	Read
Hierarchy Managers	SharePoint Group	Manage Hierarchy
Oropeza, Alfonso (RSC\oropeza_alfonso)	User	Full Control

You can make a subsite internal by disabling Anonymous Access for that site.

To disable/enable Anonymous Access to a subsite, that specific site should have unique permissions.

- From **Site Actions** menu, select **Site Permissions**
- If this site still inherit parent permissions, click on **Stop Inheriting Parent Permissions**
- The **Anonymous Access** link only appears when the site has unique permissions



- Click on **Anonymous Access** link
- Select **"Nothing"** to disable it

Anonymous users can access:

Entire Web site

Lists and libraries

Nothing

- You can enable Anonymous Access later by selecting **"Entire Web site"**

Anonymous users can access:

Entire Web site

Lists and libraries

Nothing

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24. Document Sharing

Text here

[Back to top](#)

25. Team Site Admin

Text here

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