NATO Communications and Information Agency
Agence OTAN d'information et de communication

COI COOPERATION PORTAL – USER MANUAL

Contents

1. Introduction

Community of Interest (COI) cooperation portal – known also as DNBL - is an online environment developed to foster information exchange effort within NATO enterprise, NATO and PFP nations on NU and NS level. This portal improves and simplifies collaboration on documents and facilitate dissemination among communities.

Each NATO or National working group or entity can request the creation of its own COI site (defined by not limited to C3 Taxonomy) with a number of collaboration sites, where the members can collectively work on issues related to their particular COI. Users can use available online tools such as:

- Document Library and List: to store, organize, and share documents with site users. Users can co-author, control version, and/or check out documents.
- Announcements: A list of news items, status and other short bits of information can be maintained for the COI.
- A calendar of upcoming meetings, deadlines or other events. Calendar information can be synchronized with Microsoft Outlook or other compatible programs.
- Discussion Board: A place to have newsgroup-style discussions. Discussion boards make it easy to manage discussion threads.
- Tasks web part: A place for team or personal tasks.

COI Cooperation portal is based on SharePoint 2013 technology that helps to improve productivity and efficiency of team cooperation and business processes within an organization. COI portal is much more than only document management platform. It contains wide range of helpful tools for organizing content, sharing knowledge and finding information.

This document has been created in order to familiarize COI portal users with main functionalities offered.

In order to improve the document, please do not hesitate to provide us with your feedback at dnbl_servicedesk@ncia.nato.int .

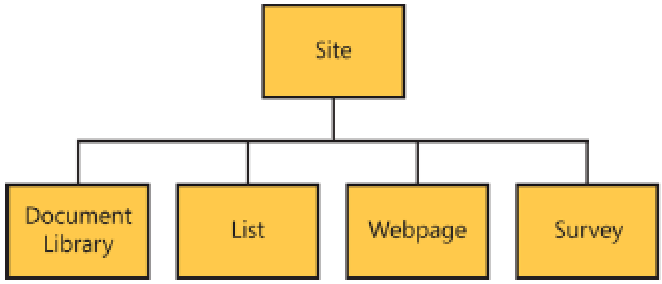
2. SharePoint site basics

a. Site structure

Typical SharePoint site consists of the following components:

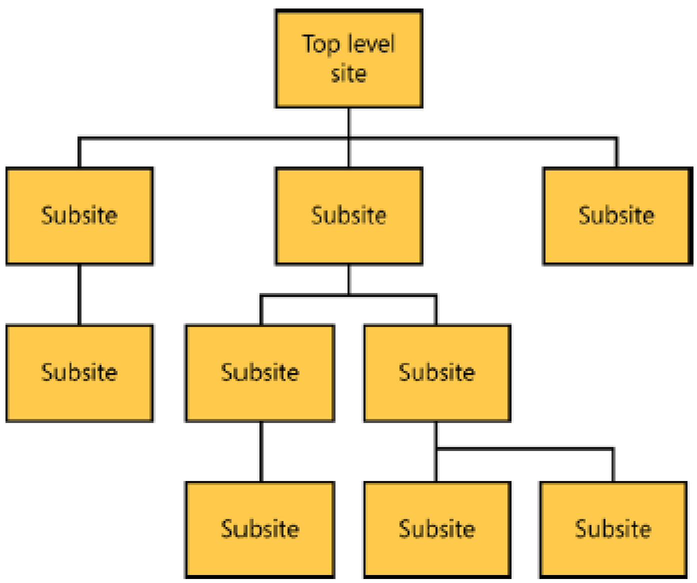
- Document libraries
- Lists
- Pages
- Apps

Simple site structure is represented by the following diagram (Survey being example of an app):

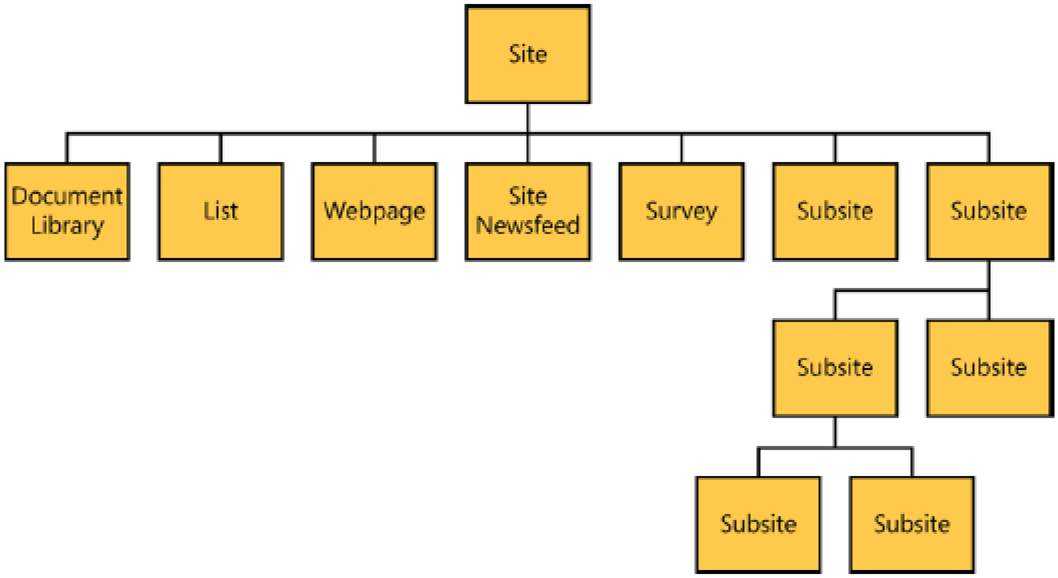


Data structure and hierarchy is maintained internally by SharePoint. Users can see and understand the hierarchy as a tree-view structure (like folders in file system).

Sites can also contain other sites (in this case they are called **subsites**), thanks to this feature we can create more complex and much deeper data structures in SharePoint. There is always one site that doesn't have a parent site. This site is called **top level site** (sometimes shorter: **root site**). Root site is where the site structure always begins. Top level site can contain multiple subsites, these subsites can also have multiple subsites. Entire structure of sites with their subsites is called **site collection**.



Each subsite can be built with components mentioned at the beginning of this chapter, so along with subsite we may have lists, libraries, pages and apps (we call it **site contents tree**).

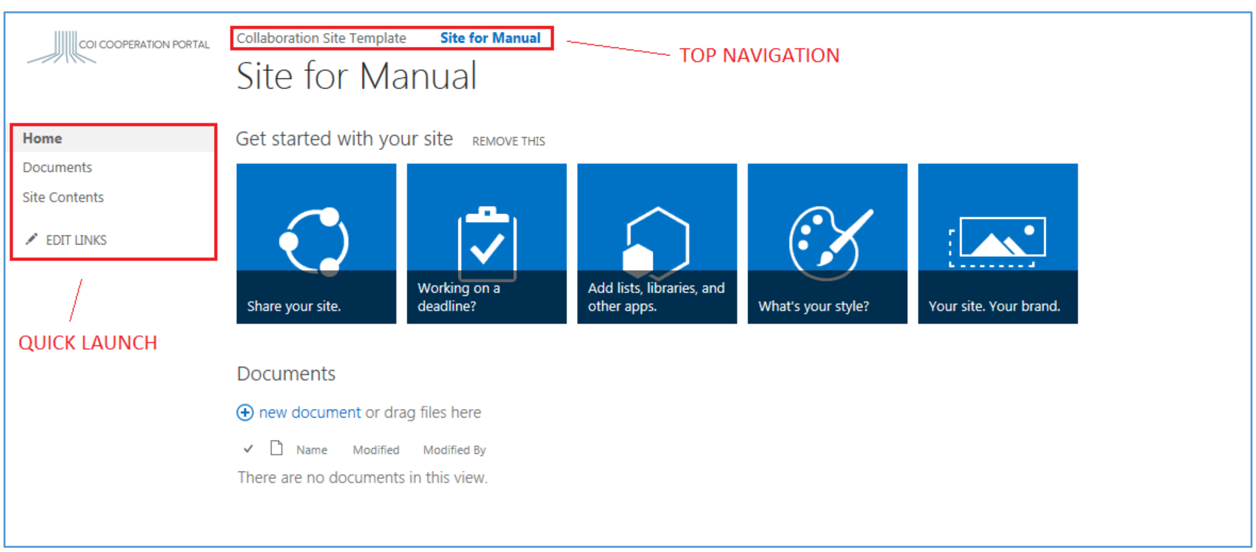


b. Home page and navigation

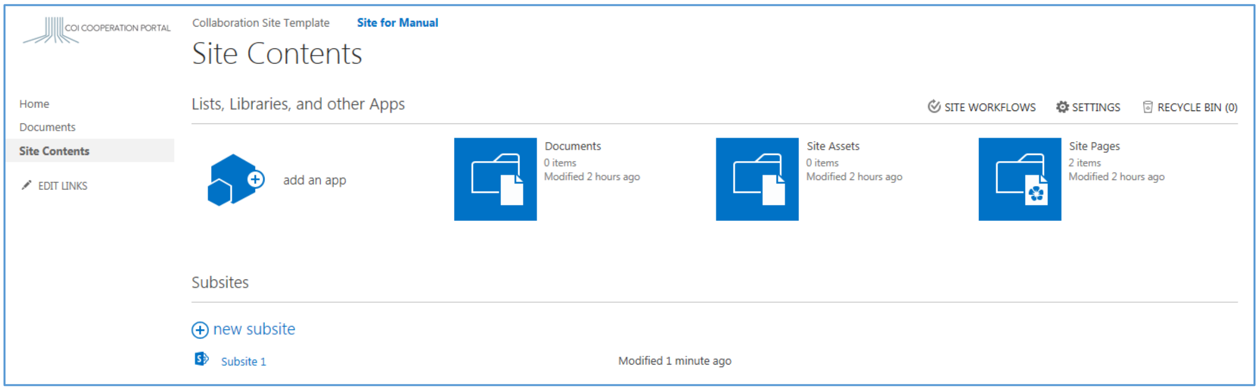
Home page is a main (starting) page of a SharePoint site. Besides data displayed in the main area of the page, it also provides navigational structure that glues site components and makes it easy to go through the site structure. Typical SharePoint page have two navigation areas:

- Quick launch bar (vertical bar at the left side of the page)
- Top navigation bar (horizontal topmost bar)

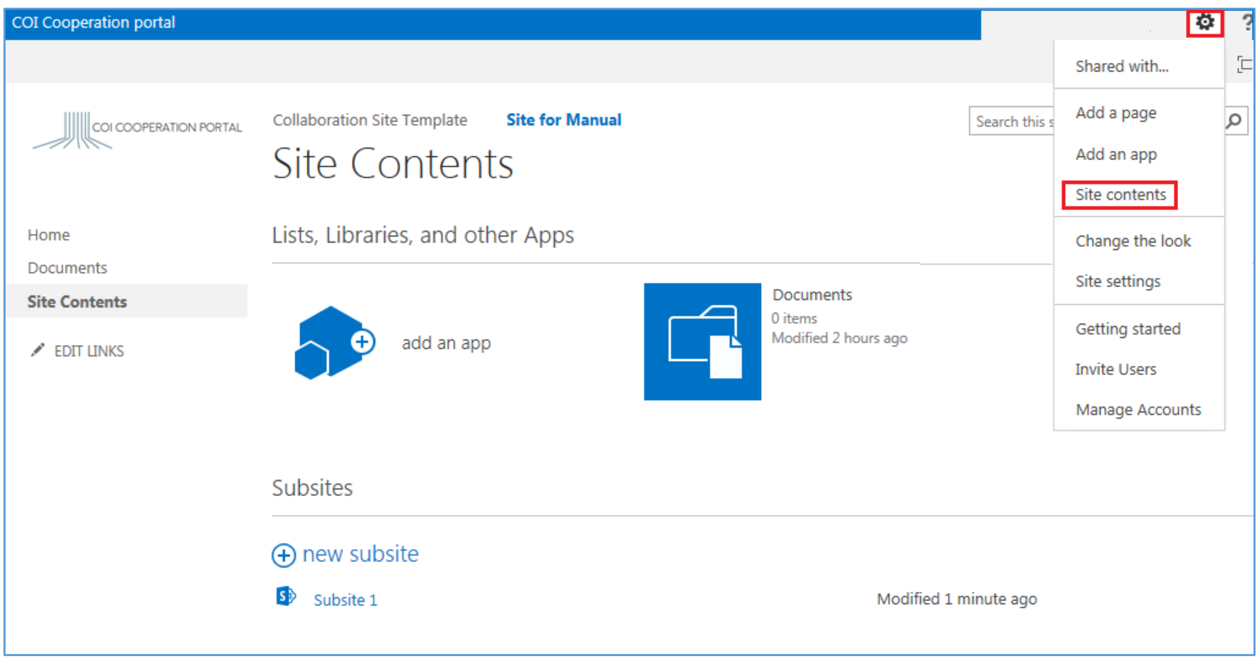
Following screenshot explains position of the navigation bars:



Site Contents page is a special type of navigation. It shows list of direct subsites for the site and list of components within current site (lists, libraries etc.).

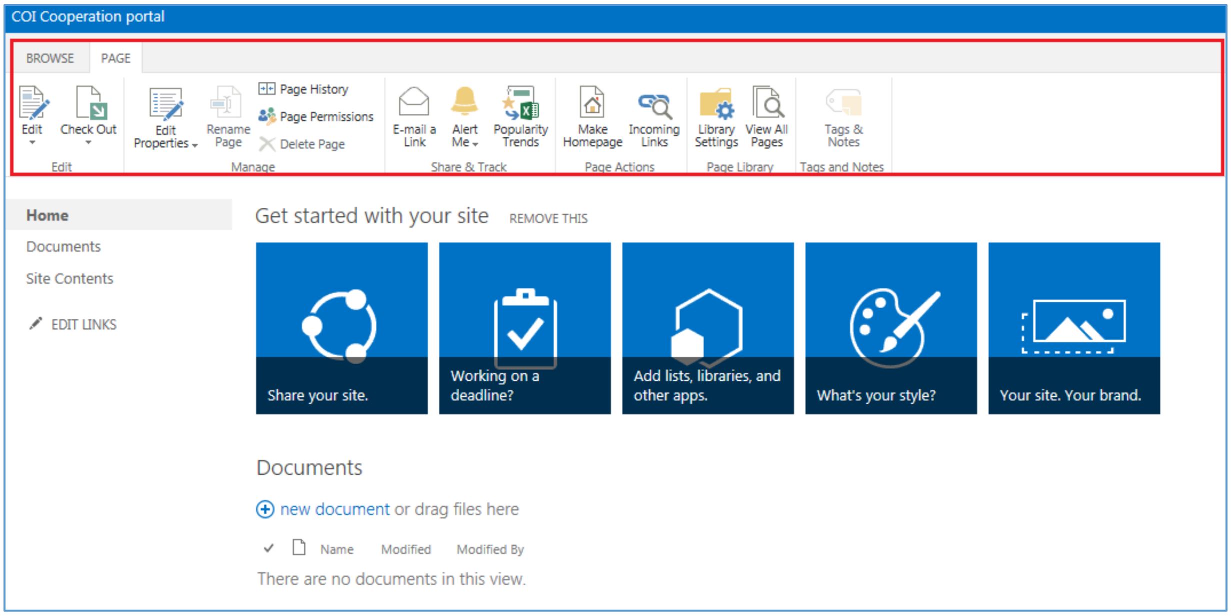


To access this page, use Site Actions -> Site Contents menu



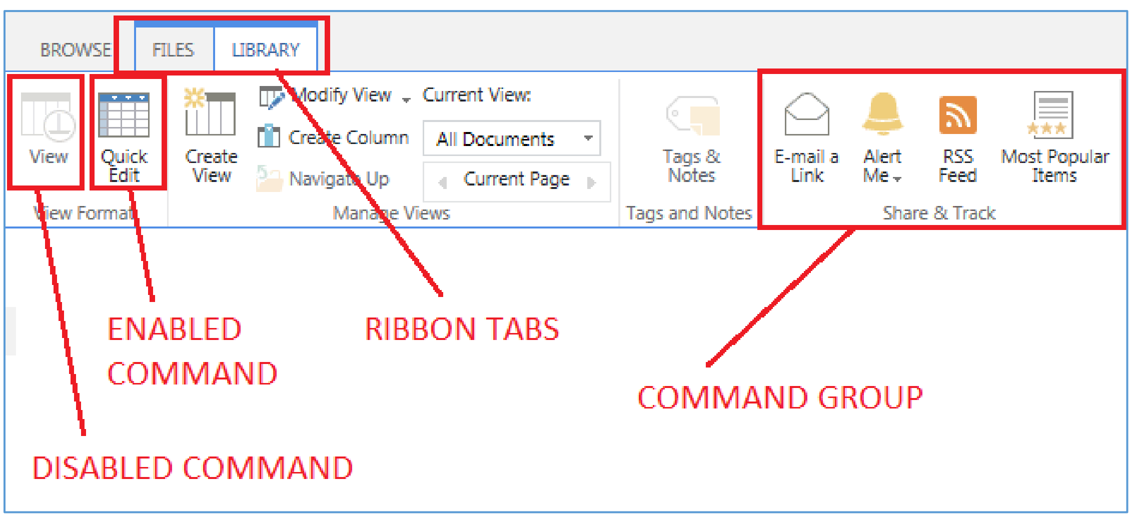
c. Ribbon

Ribbon is an extra bar on top of each SharePoint page, that provides handy interface for completing various tasks on pages, documents, lists etc. It's designed pretty much with the same concept as in other Office applications like Word or Excel.



Contents of the ribbon depends on current context. Based on where we are within the site some options may be shown or hidden on the ribbon. Based on permissions some of them are enabled or disabled.

All commands on ribbon are grouped in tabs and divided into logical groups for user's convenience.



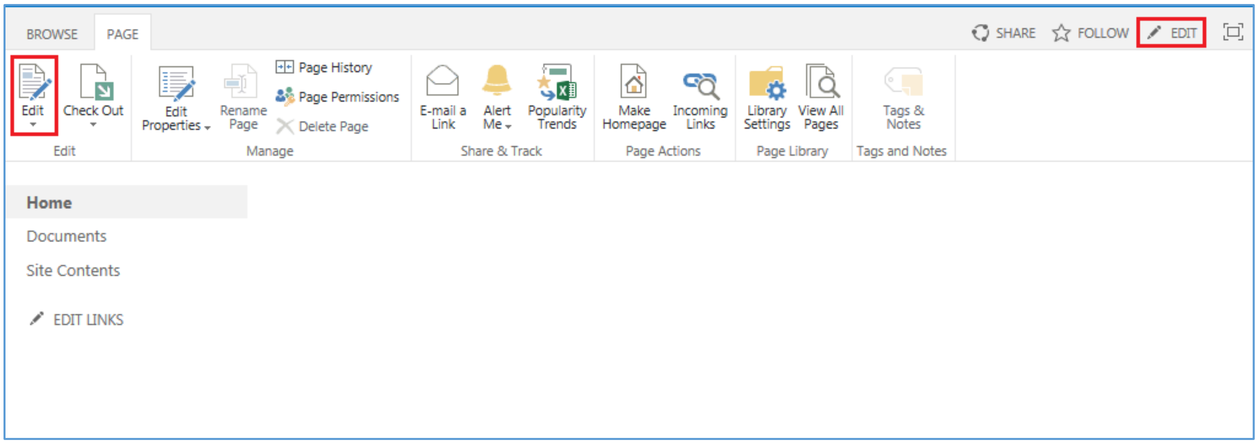
Many useful ribbon options will be described in this manual while going through different features of the system.

d. Web parts

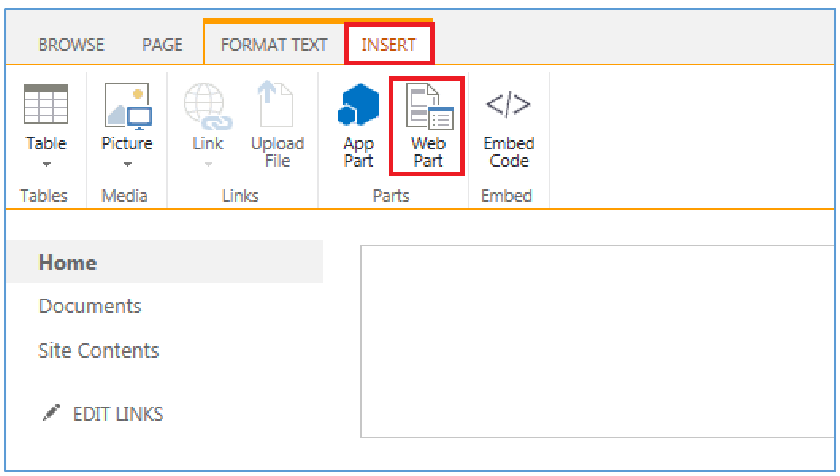
Web part is one of the building blocks of every SharePoint page (along with text, images, links etc.). Web part is an independent, reusable component that can be put on pages within SharePoint site and work different way depending on the context.

i. Adding web part to the page

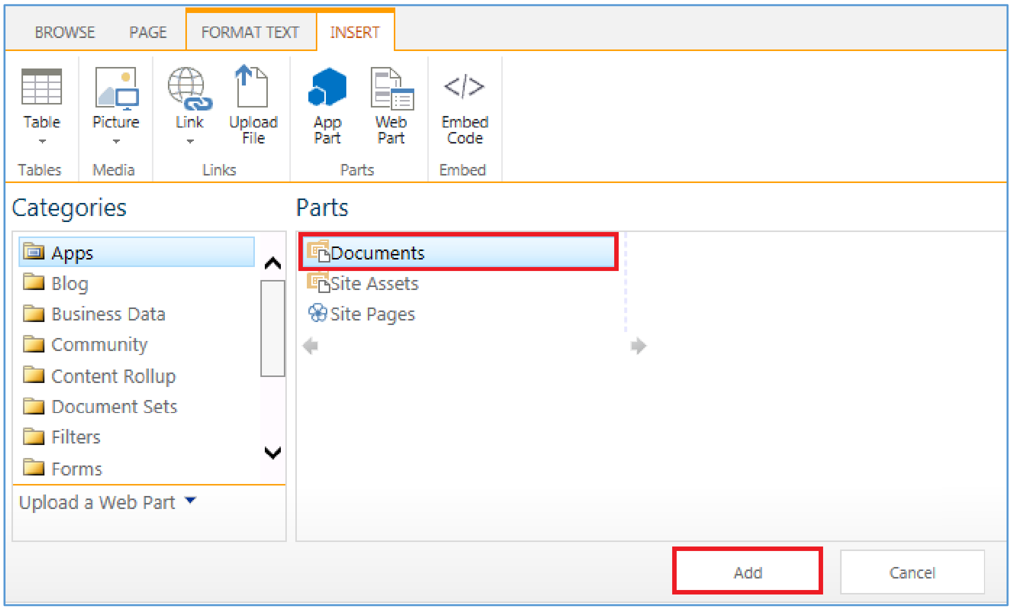
First step necessary when adding web part to the page is to switch the page to edit mode. Let's assume that we have an empty page. We enter edit mode using "Edit" command from the ribbon or edit shortcut in the top right corner of the page.



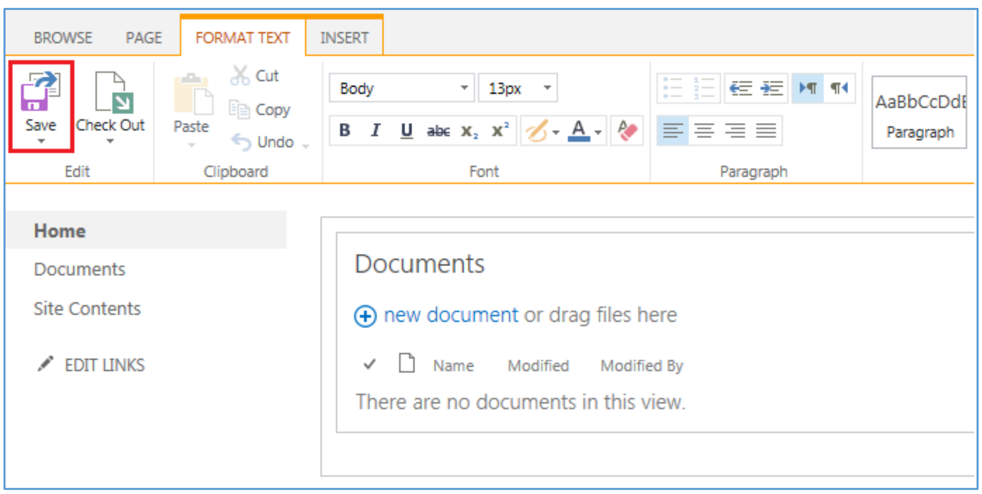
Now we switch ribbon to **INSERT** tab and click on **Web Part** action from **Parts** group



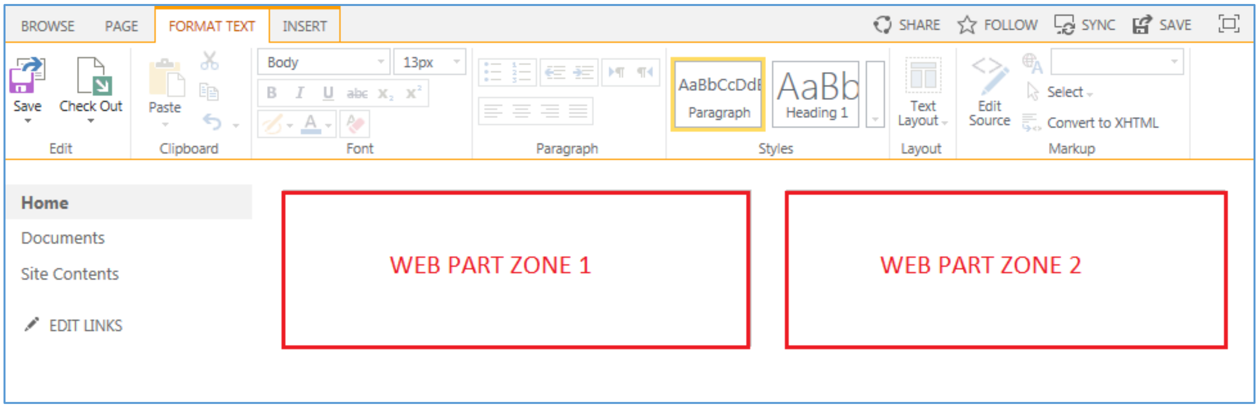
After finding correct web part within categories we select it and click on Add button:



In order to make this change visible to other users it should be confirmed by clicking on “Save” button from ribbon.

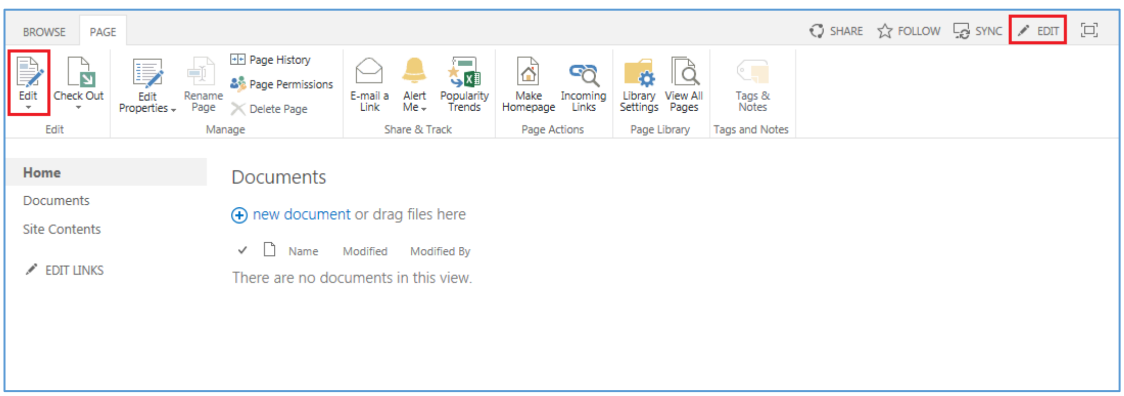


If there is more than one **web part zones** on the page desired web part zone should be selected (clicked, focused) before inserting web part, otherwise it will be inserted in first web part zone on the page.

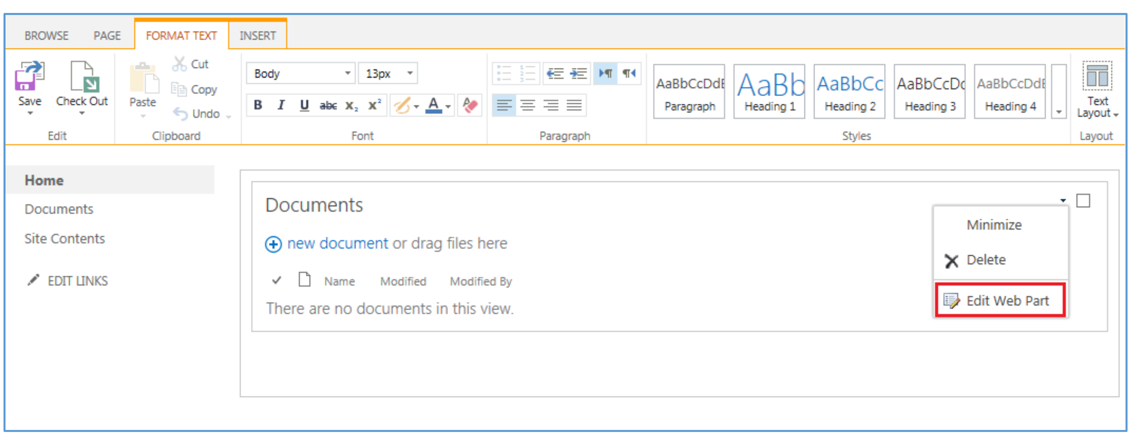


ii. Editing web parts

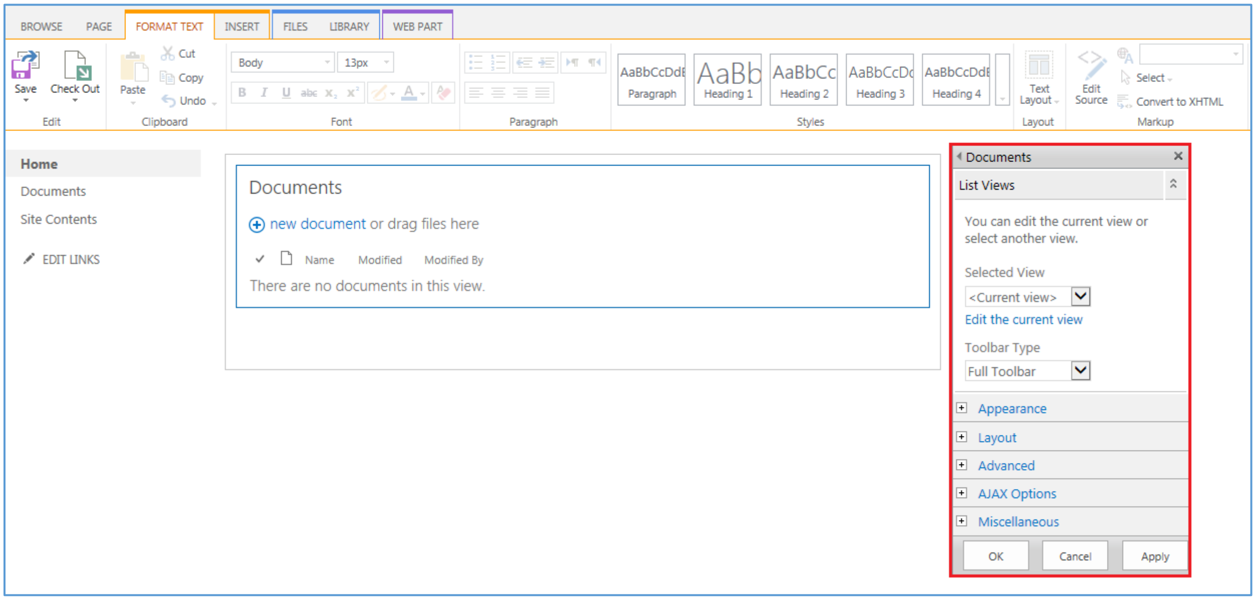
When web part is added to the page all web part properties are set to default values. These properties can be later changed by user with appropriate permissions. In order to do that, parent page has to be switched to edit mode first. Edit mode can be achieved with use of "Edit" command from the ribbon or edit shortcut in the top right corner of the page.



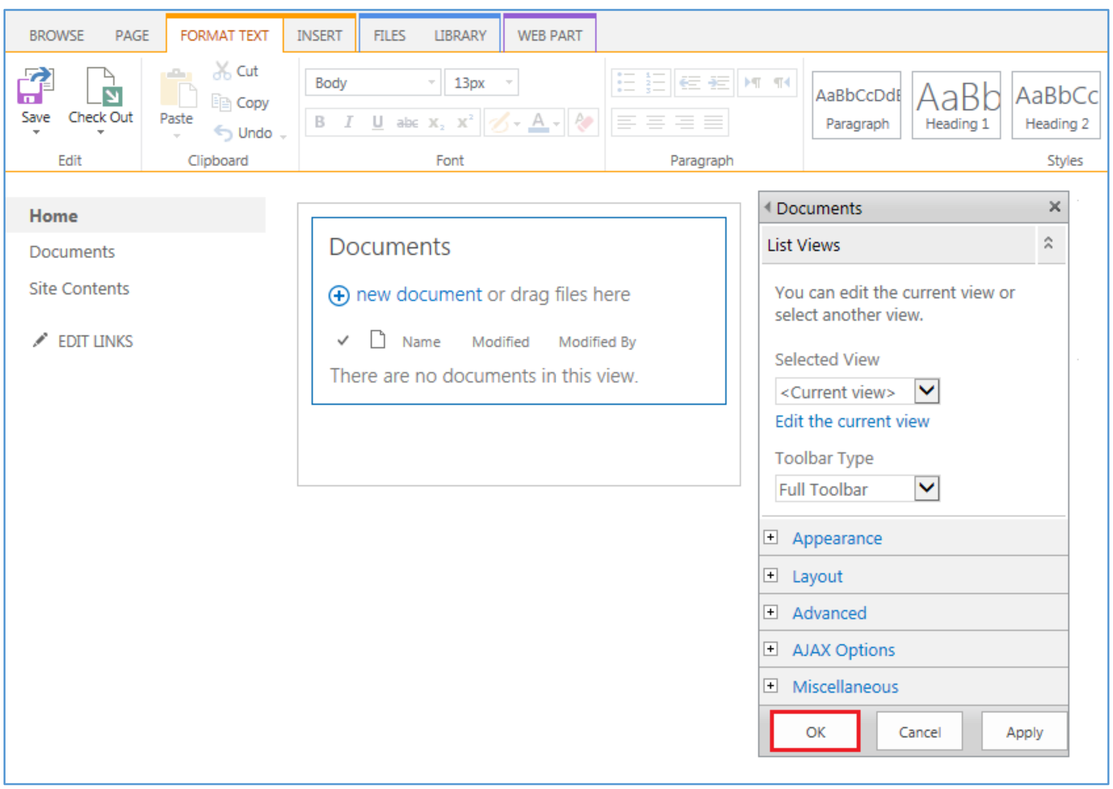
Select "Edit Web Part" command from short web part menu (it will appear when hovering over top right corner of the web part).



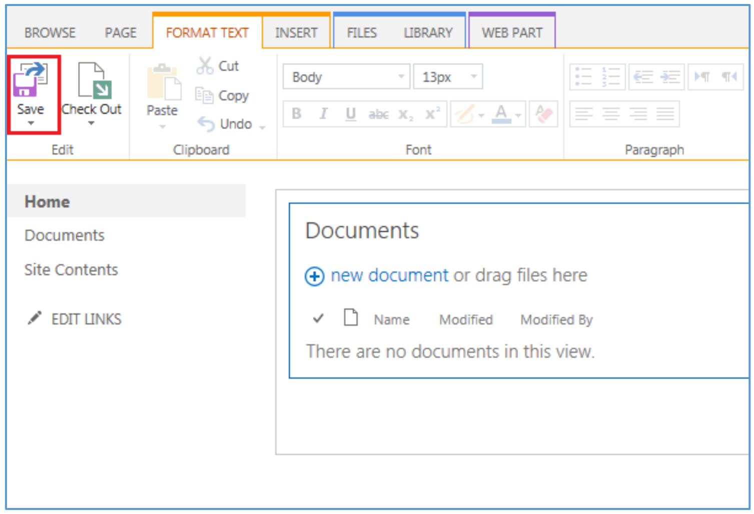
Special vertical edit menu will appear on the right side of the page. In this menu we can change all web part options – regarding appearance, layout, data sources and many more useful properties.



When changing values to the properties click OK button to apply changes.

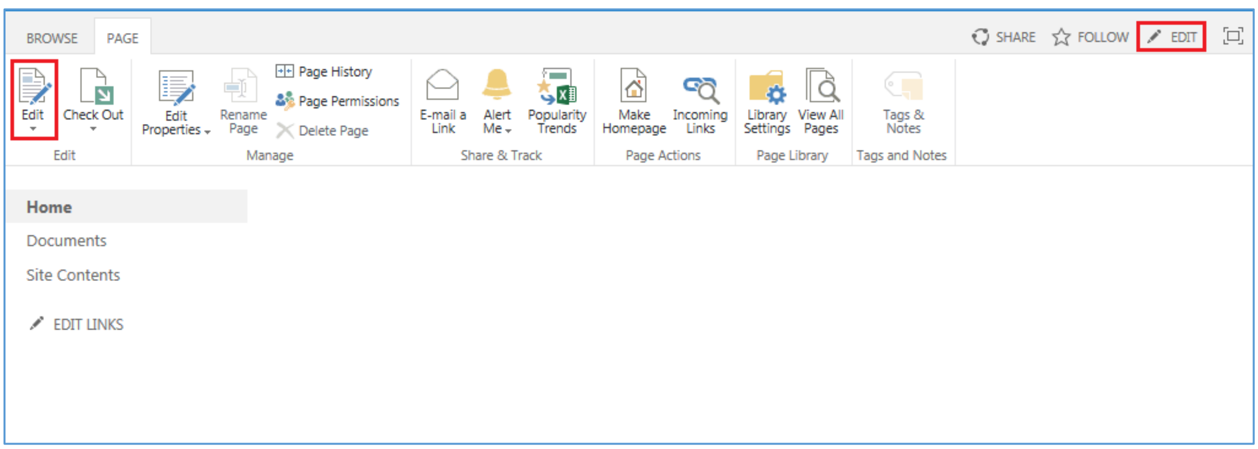


Any changes on the page have to be always confirmed by clicking "Save" button on the ribbon.

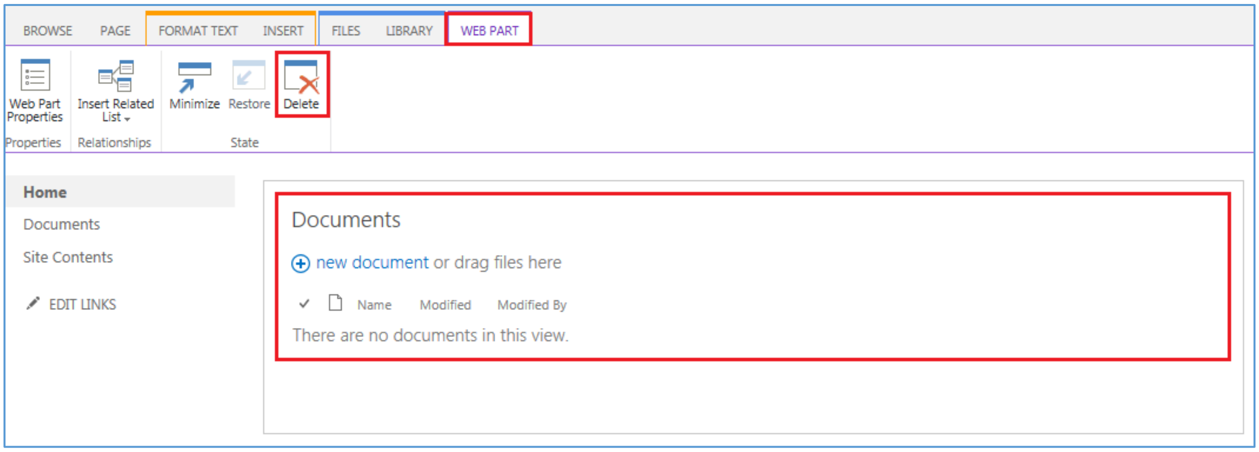


iii. Removing web parts

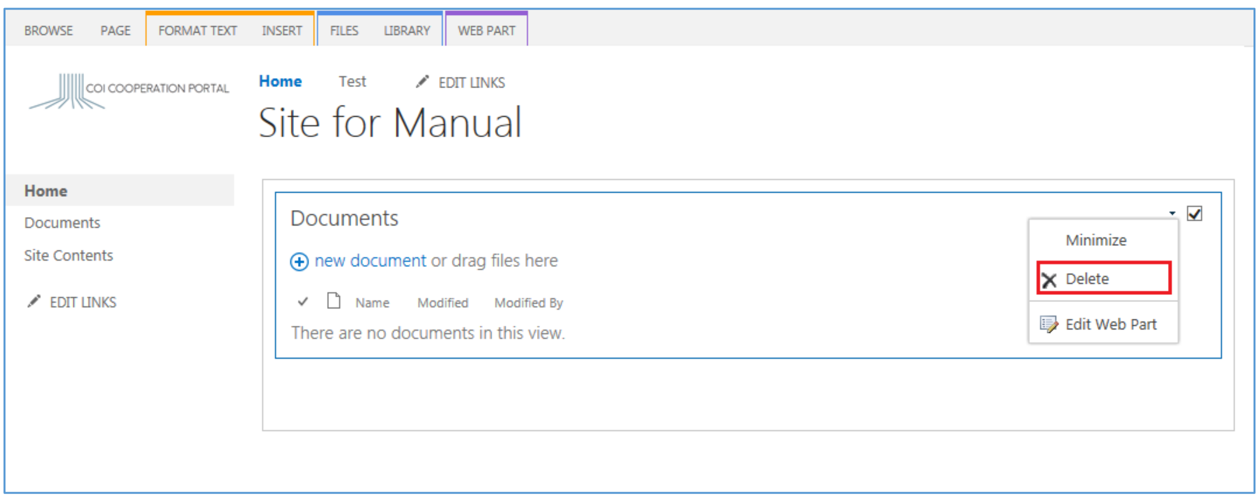
In order to remove web part from the page we need to switch page to edit mode. We enter edit mode using "Edit" command from the ribbon or edit shortcut in the top right corner of the page.



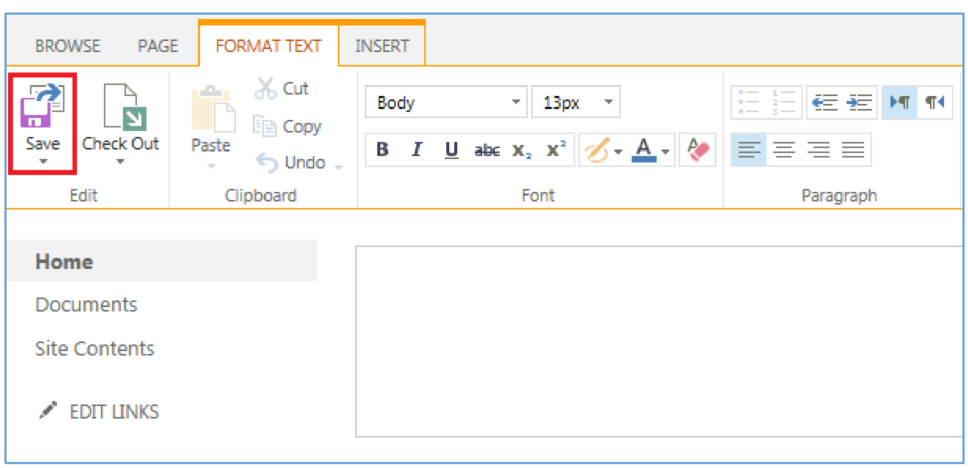
Now we can select web part on the page and click on "Delete" ribbon command from **WEB PART** tab.



It can be done even quicker from short web part menu. It will appear when hovering over top right corner of the web part.



Page has to be saved so changes can be confirmed and visible to other users (ribbon Save button).



e. Recycle bin

i. Introduction

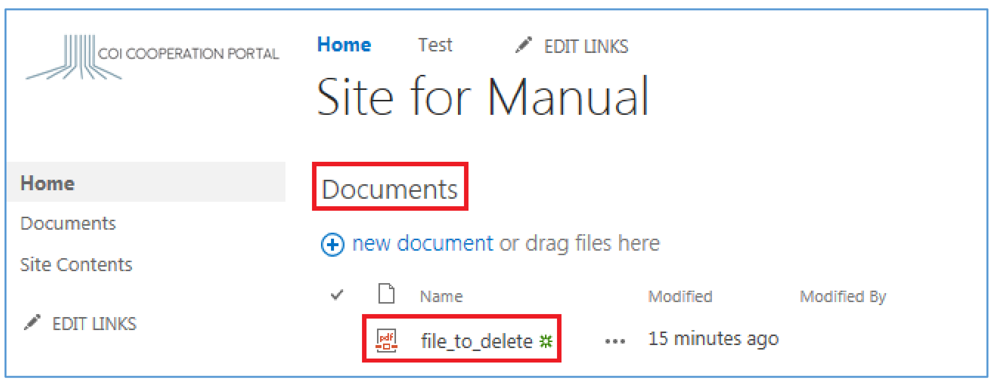
Recycle bin is a practical protection mechanism against deletion of the content that should not be deleted. When file, list item or any other asset is deleted from SharePoint, it is automatically placed in recycle bin, from where it can be restored if needed. There are two levels of recycle bin:

- Site recycle bin (also called user recycle bin), which holds content deleted directly from the site by regular users
- Site collection recycle bin, which holds content deleted from site recycle bin

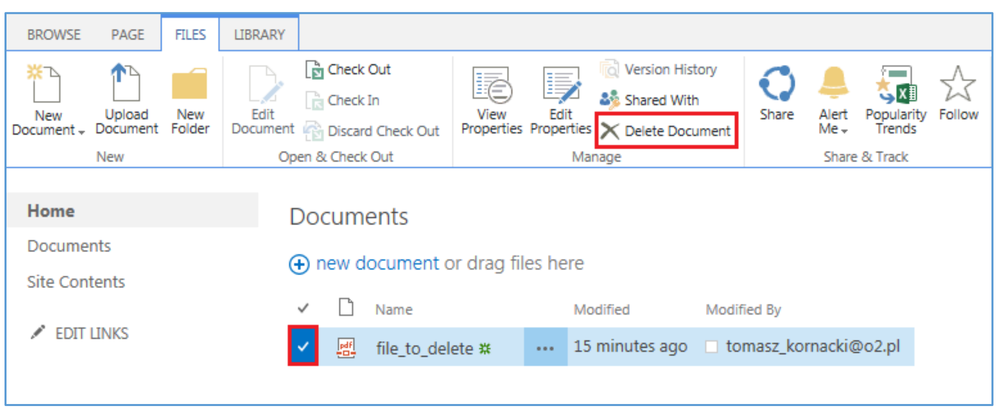
In this two-level architecture site collection administrator is able to restore content deleted from user's recycle bin (in case if recycle bin has been emptied accidentally or expiration date has been reached).

ii. Deleting / restoring the file

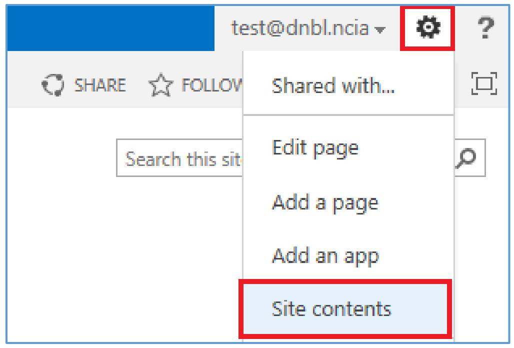
Let's assume that we have a file in a document library called "Documents"



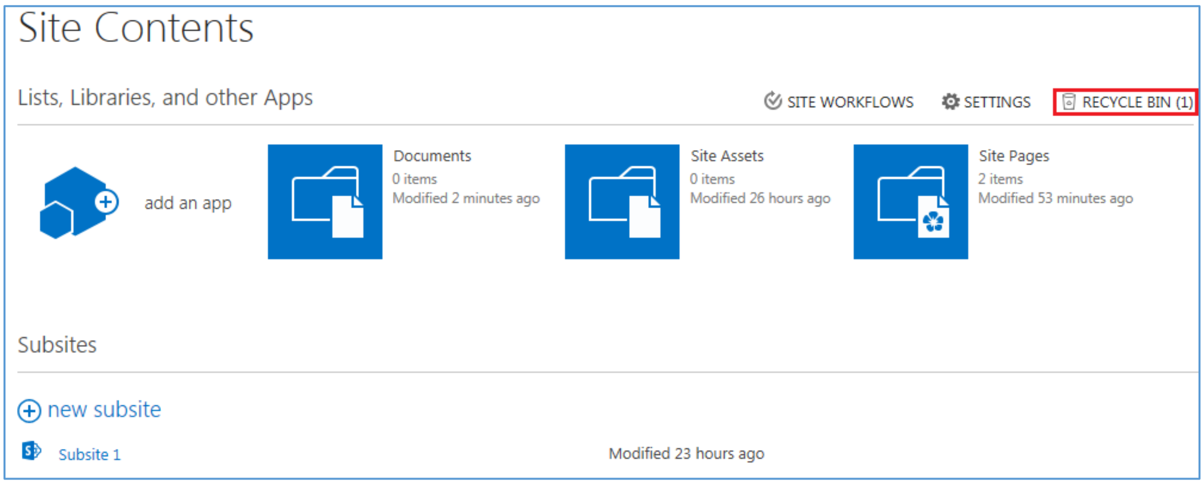
We delete the file with use of "Delete" command from SharePoint ribbon (file has to be selected first)



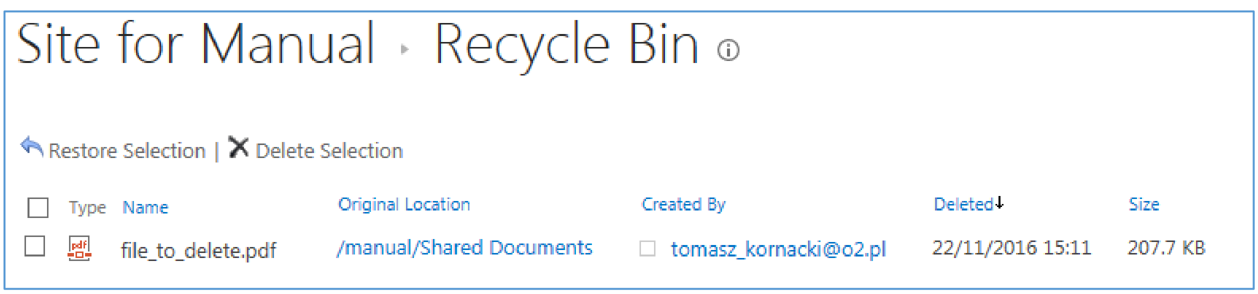
To access user's recycle bin we have to navigate to Site Actions -> Site Contents



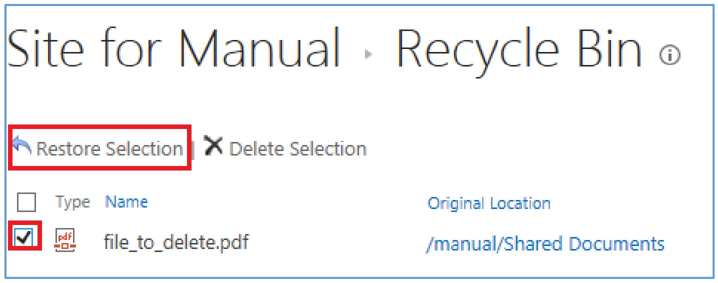
On Site Contents page we can access recycle bin from the following link



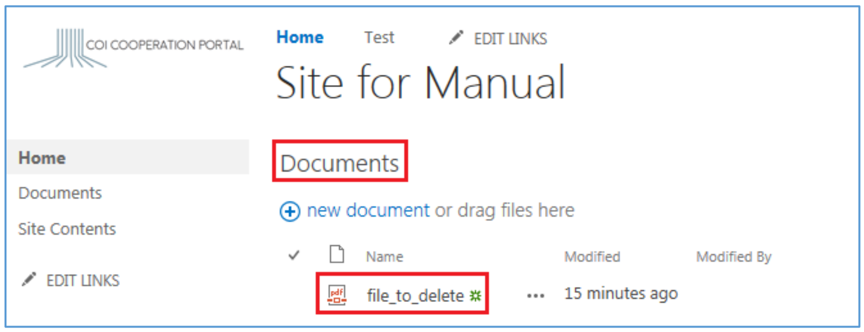
Recycle bin page shows some basic information about deleted files including from where and when exactly the file was deleted



There are two action buttons for the recycle bin – "Restore Selection" and "Delete Selection". Buttons work in context of selected files. In order to restore file to its original location, we need to select it with check box and run "Restore Selection" action.



The file will be available again in “Documents” library and it will disappear from the recycle bin.



“Delete Selection” action removes the file from user’s recycle bin and moves it to site collection recycle bin (from now on only site collection administrator has possibility to restore the file).

3. Working with lists and libraries

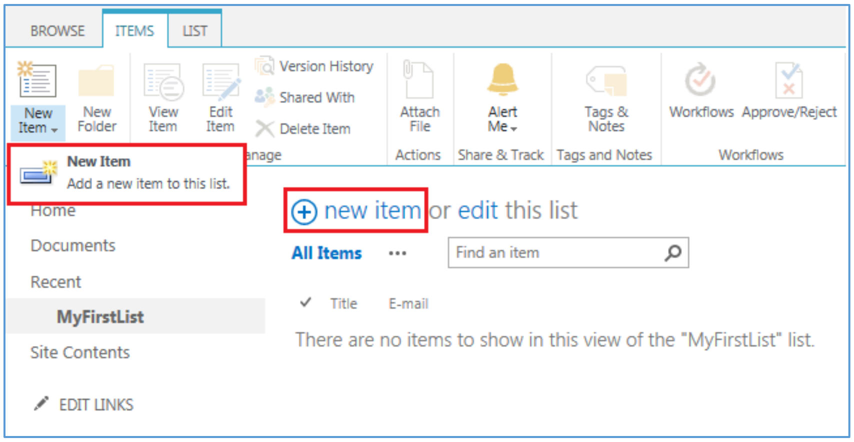
a. Introduction

List in SharePoint can be described as an editable, web-based, two-dimensional table containing data divided into rows and columns. Data in lists can be simultaneously accessed and changed by multiple concurrent users. SharePoint provides users with automatically generated interface and tools for creating, deleting and managing contents of the list.

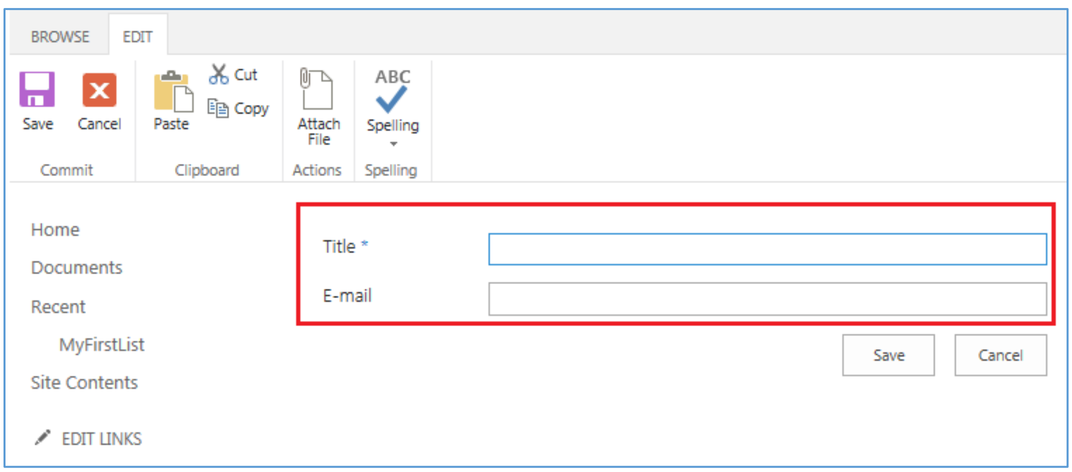
b. Adding and editing list items

i. Adding list item

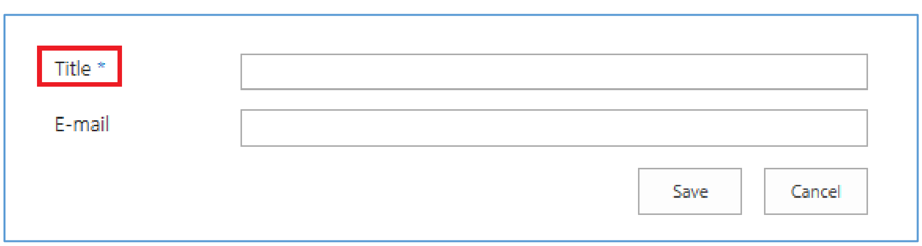
New items can be added to the list with use of New Item command from SharePoint ribbon or new item link above the list view.



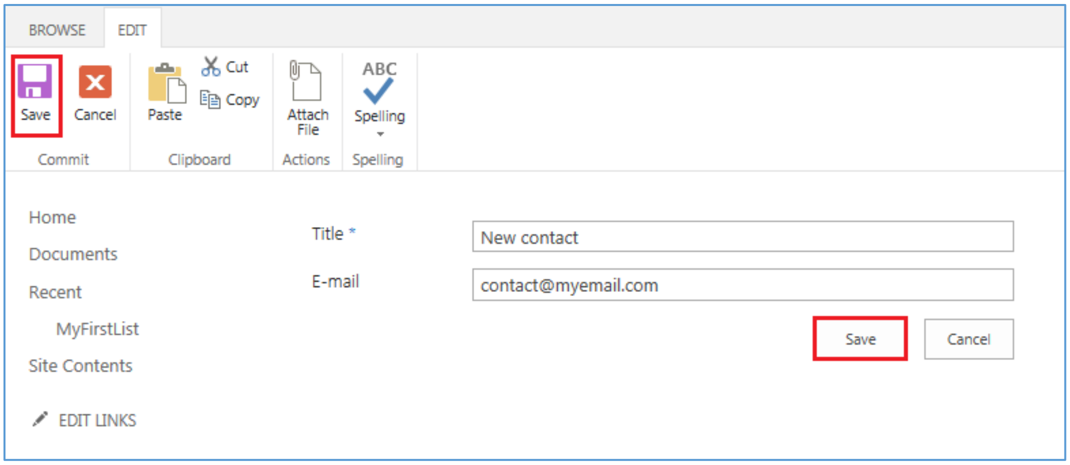
Both actions redirect users to the same page, which is called New Form. This form is generated automatically by SharePoint based on current column configuration (all editable columns will be rendered on the page, column type will determine the way the column is rendered).



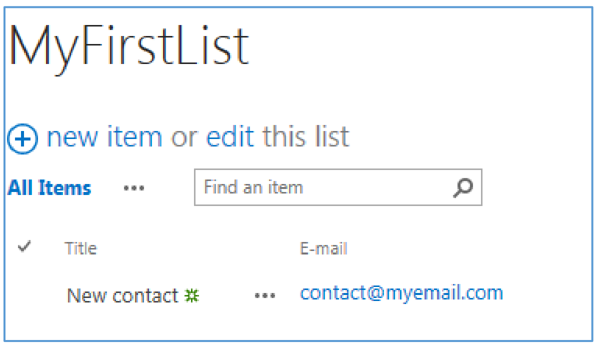
Required columns will be marked with asterisks (all required columns need to have values before the form can be saved).



When all necessary values has been entered to the columns, the form can be saved by clicking on one of the **Save** buttons.

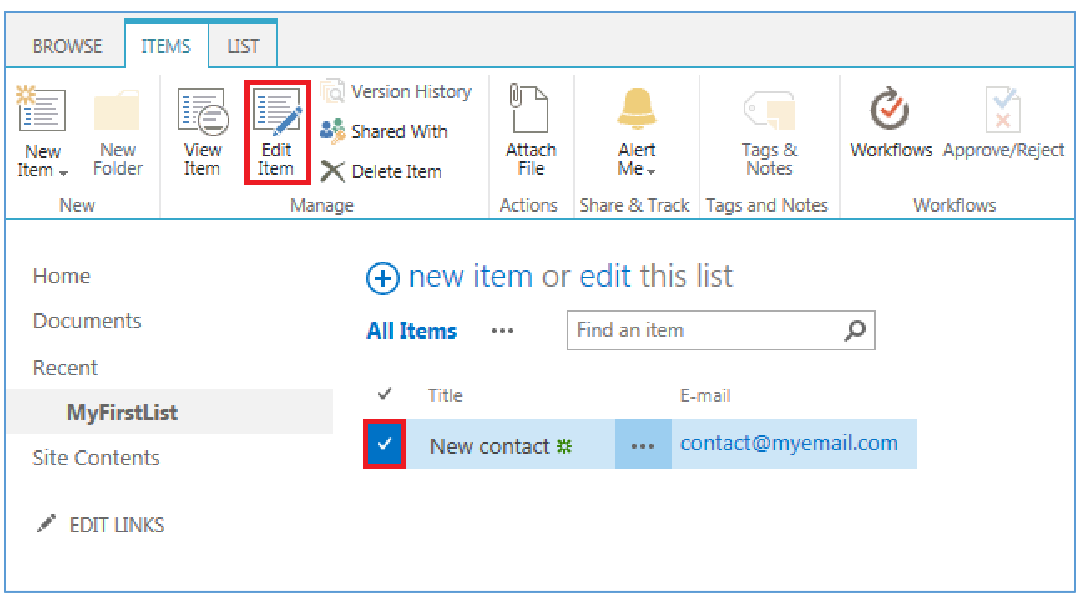


List item gets saved and automatically loaded to the list view

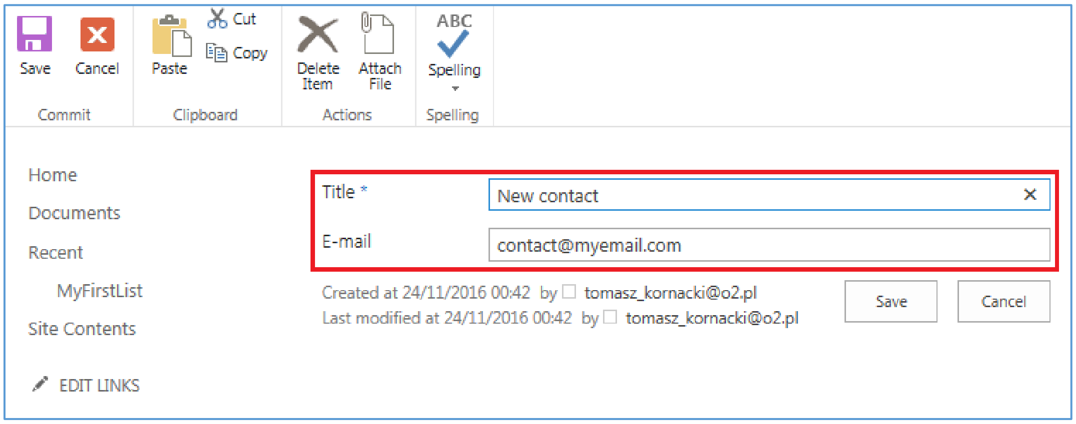


ii. Editing list item

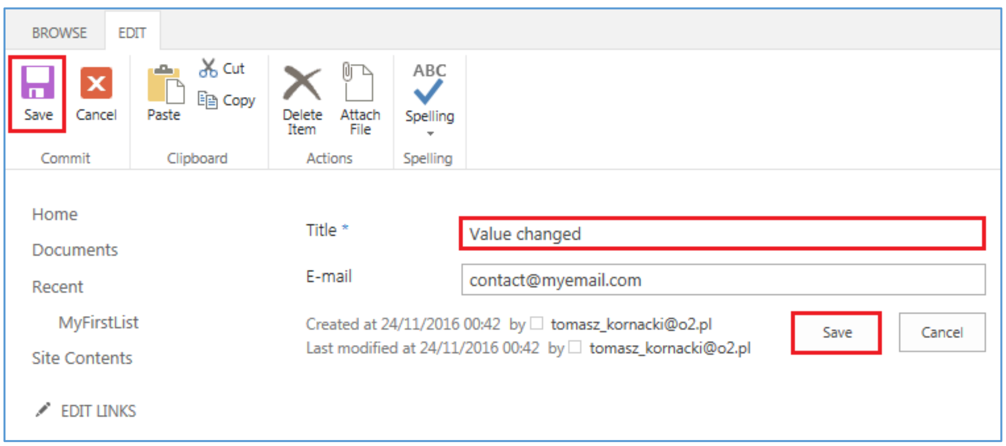
To edit item which already exists in the list, select the item and choose “Edit Item” command from SharePoint ribbon.



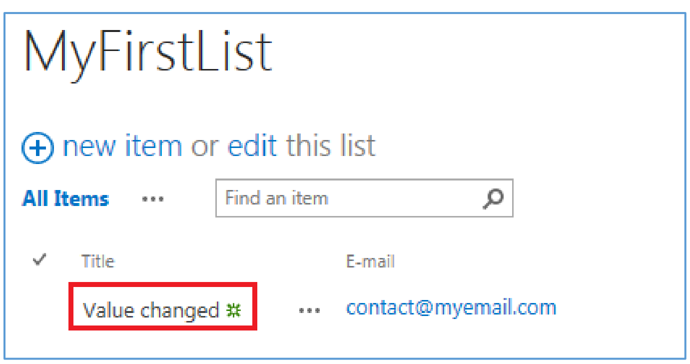
This button redirects user to the Edit Form page, automatically generated by SharePoint based on current column configuration and with current values loaded from list item.



After making necessary changes (applying new values) "Save" button needs to be clicked in order to save the form.

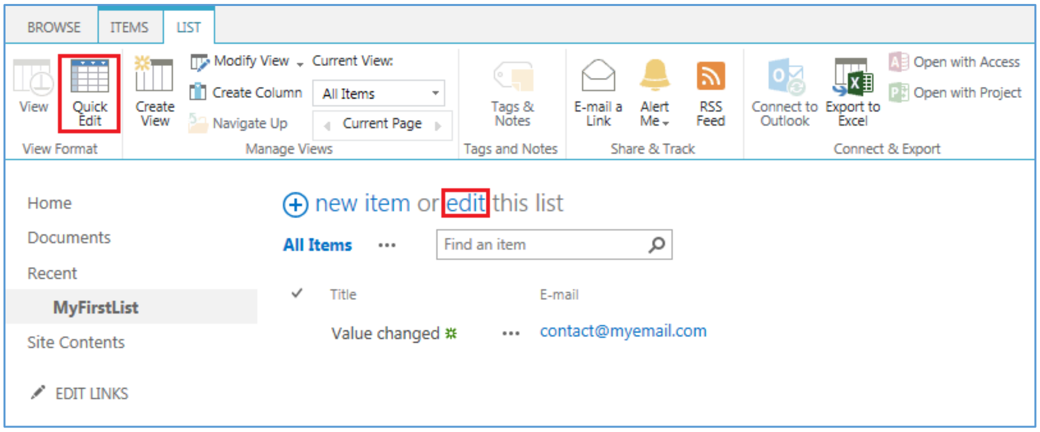


SharePoint will push the change to the database.

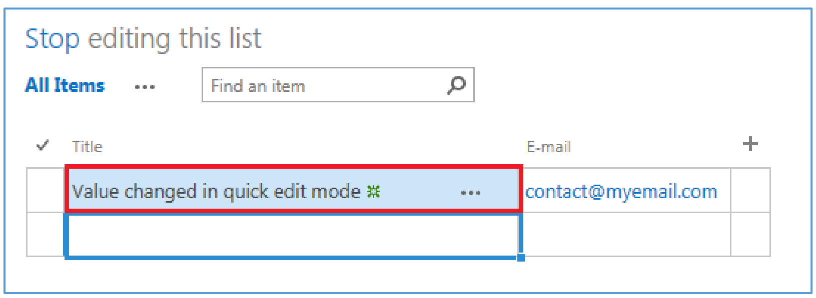


iii. Editing list in-place

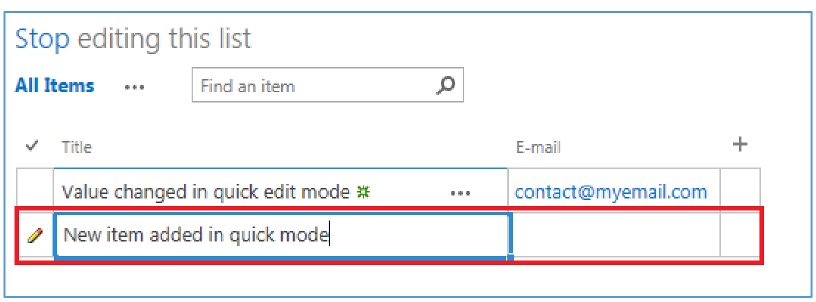
SharePoint provides one additional way of managing list items called Quick Edit. This feature can be turned on with use of "edit list" link or SharePoint ribbon "Quick Edit" command.



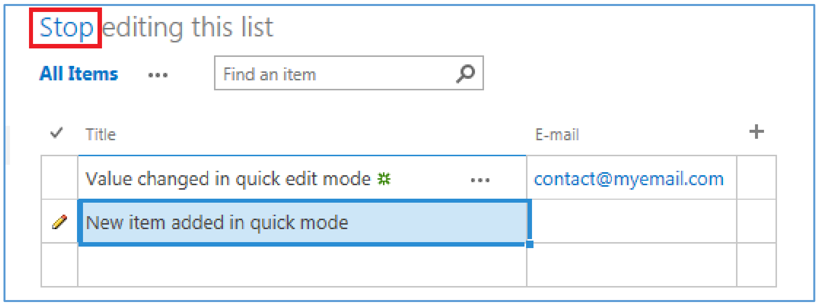
Quick edit works similar to Excel. It is possible to put the cursor in a single cell and edit its value. What is different from Excel though, values are not saved automatically. They are saved every time when cursor is changing the row (and only if any changes to the values have been made).



It is also possible to add new items to the list in quick edit mode. New values should be put to the last row of the table. Again, item will be saved only after putting cursor in different row.



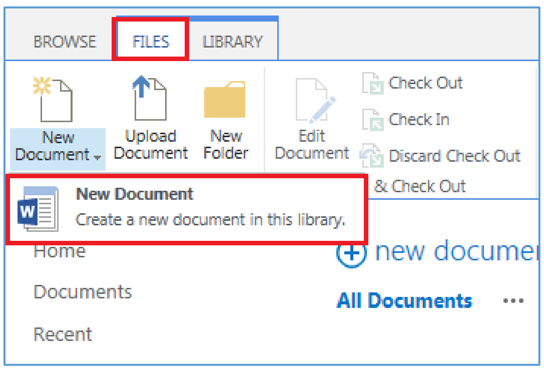
View can be switched back again from edit mode to read mode with use of Stop button.



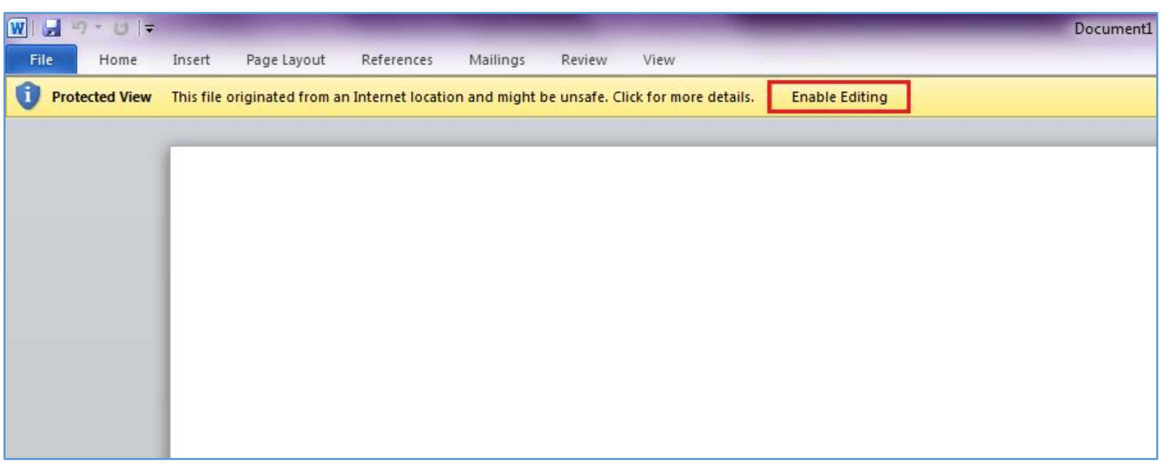
c. Creating and uploading documents

i. New Document command

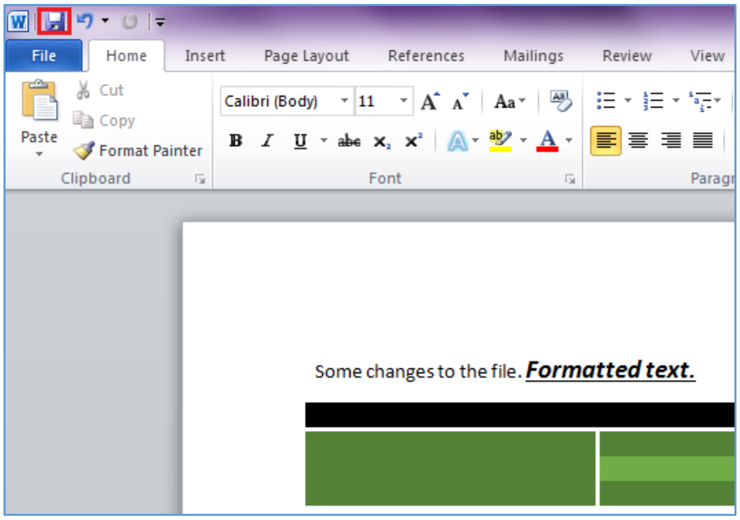
If we don't have a document yet, we can of course create it on our hard disk and then upload it to SharePoint library, but there is simpler option. We can create document directly in SharePoint library with use of **New Document** command from ribbon (FILES tab).



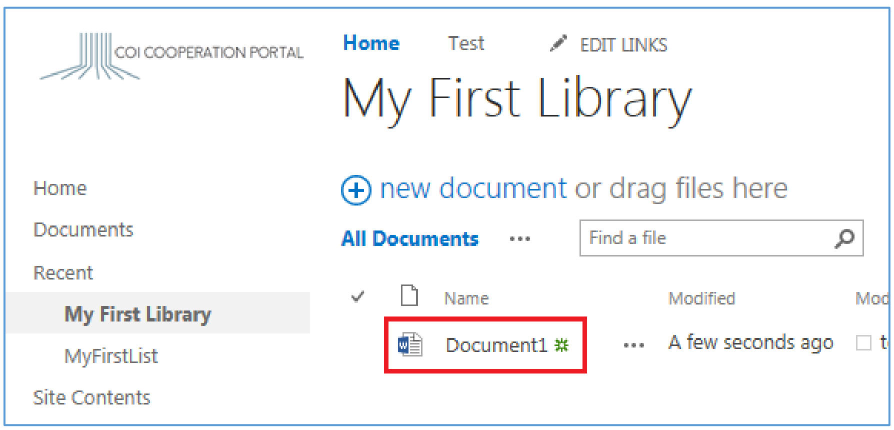
Empty document will be created in SharePoint library and automatically opened in Microsoft Word. If SharePoint site is not on the list of trusted locations, Word may display security message and temporarily disable editing. In this case, edit mode can be enabled by Enable Editing button.



Now is the time to make changed to the document, add text, tables etc. When ready, Save button should be clicked and changes will be automatically transferred to SharePoint library.



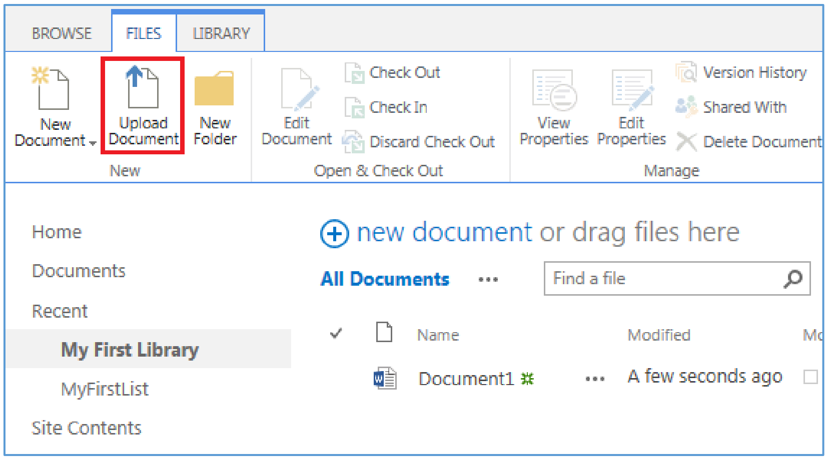
Updated version of the file can be now accessed from any other SharePoint user with sufficient permissions.



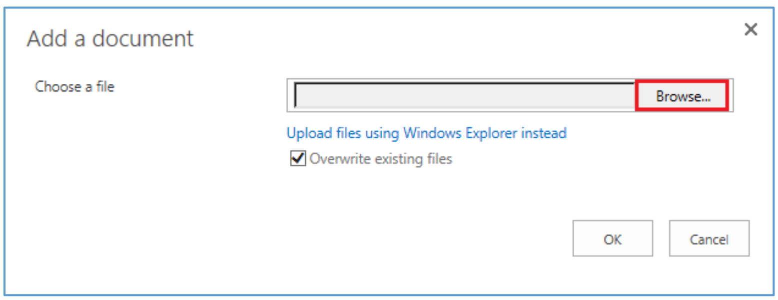
This functionality is not limited only to Word files. New Document command creates file based on template settings. This template is set by default to Word document for new libraries. There is no reason why not to change it to Excel or PowerPoint.

ii. Uploading single document

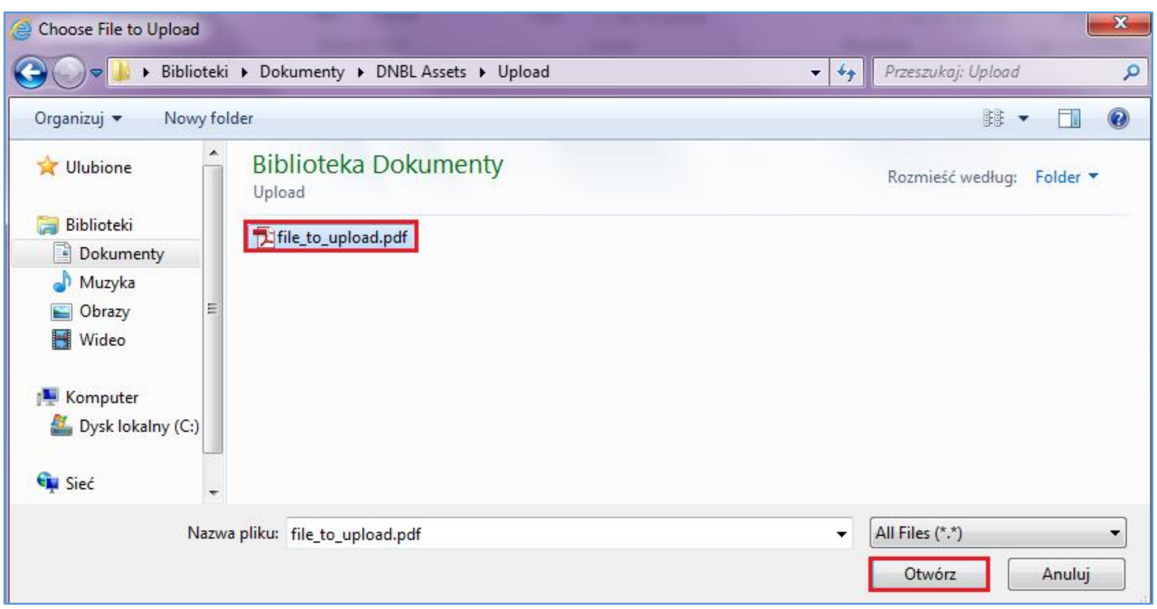
If we already have the document and we'd like to put it SharePoint library we can use Upload Document command from the ribbon (FILES tab).



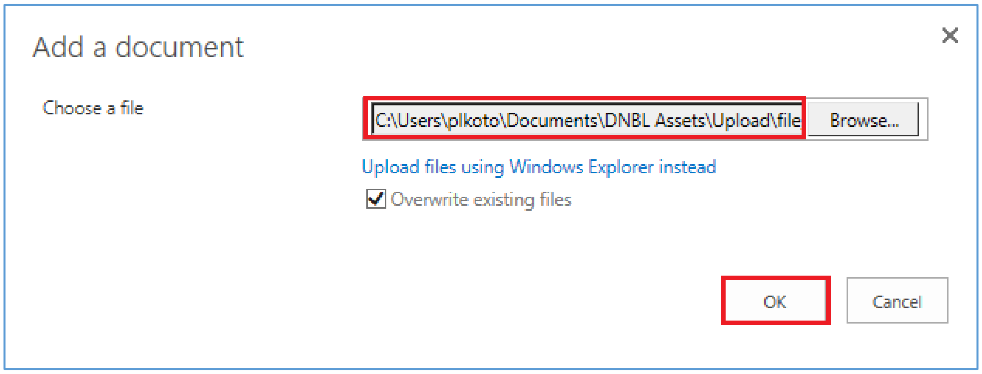
In **Add a document** popup we click on **Browse** button.



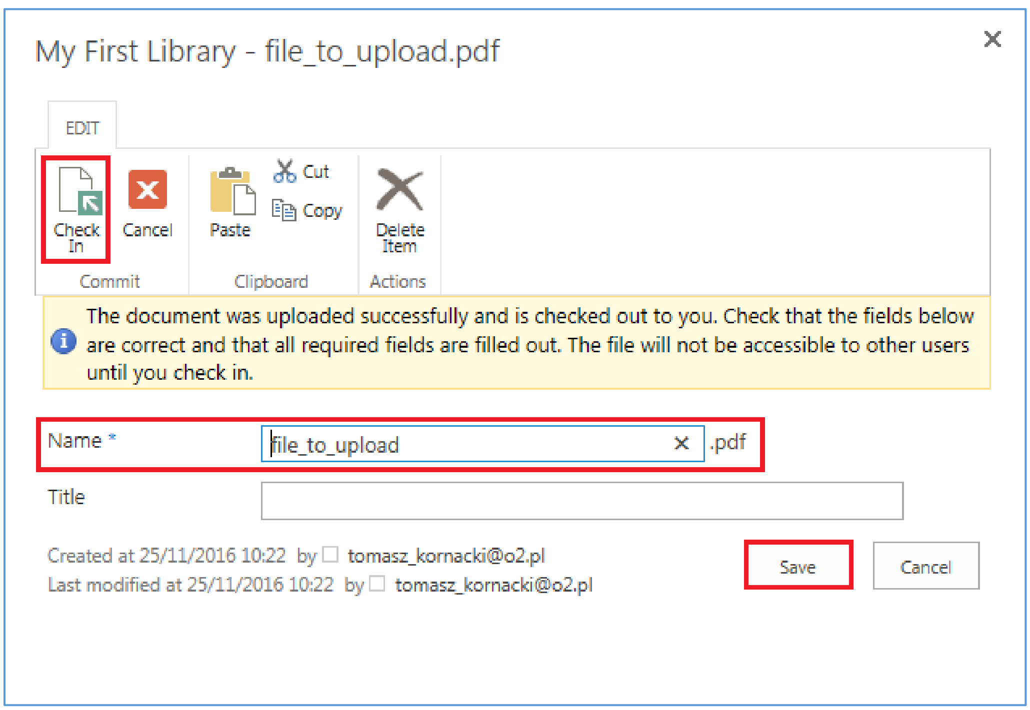
And now we navigate to the file that we'd like to upload. We select the file and click on **Open** button (or just double-click the file).



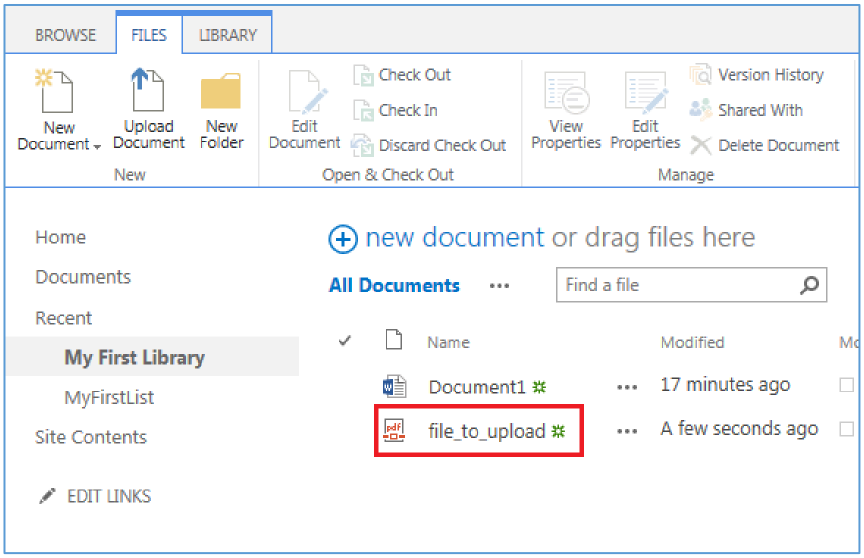
From **Add a document** popup we should confirm upload, by clicking on **OK** button.



SharePoint will upload the file now and then metadata edit form will be automatically opened. This is necessary, because some of the columns in the library may be marked as required and therefore user should provide values for them (**Name** is an example of required column, we can imagine that every file needs to have a name). When we finish filling-in column values, we click on **Check-In** button (if we want to make the file visible to other users) or **Save** button (if we want to wait with showing the file to other users). There will be much more information on checking-in and checking-out documents later in this chapter.

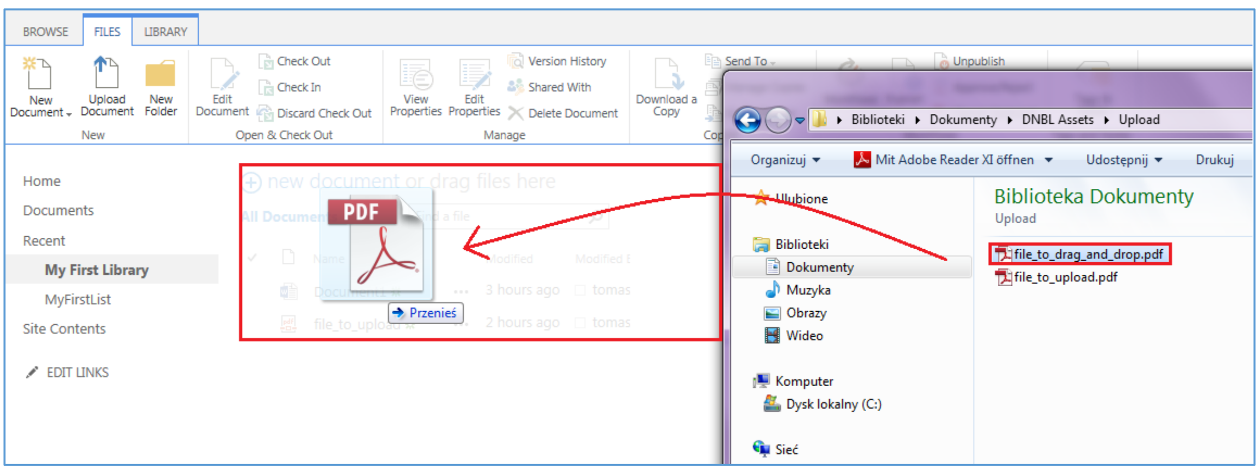


File is now uploaded to the library and can be further used.

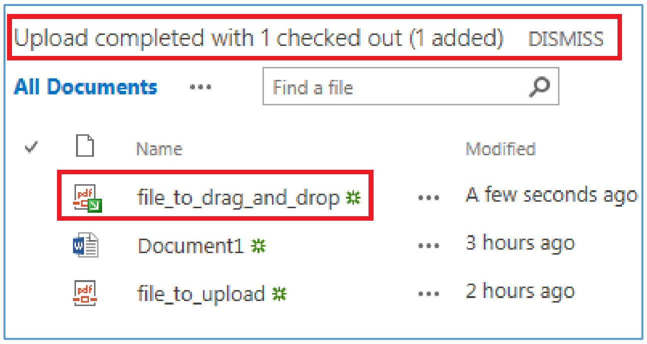


iii. Dragging and dropping documents

From SharePoint 2013 there is one additional options for uploading documents to SharePoint library - drag & drop. It is very intuitive and simple, files can be dragged directly from Windows folder to SharePoint list view in a browser.

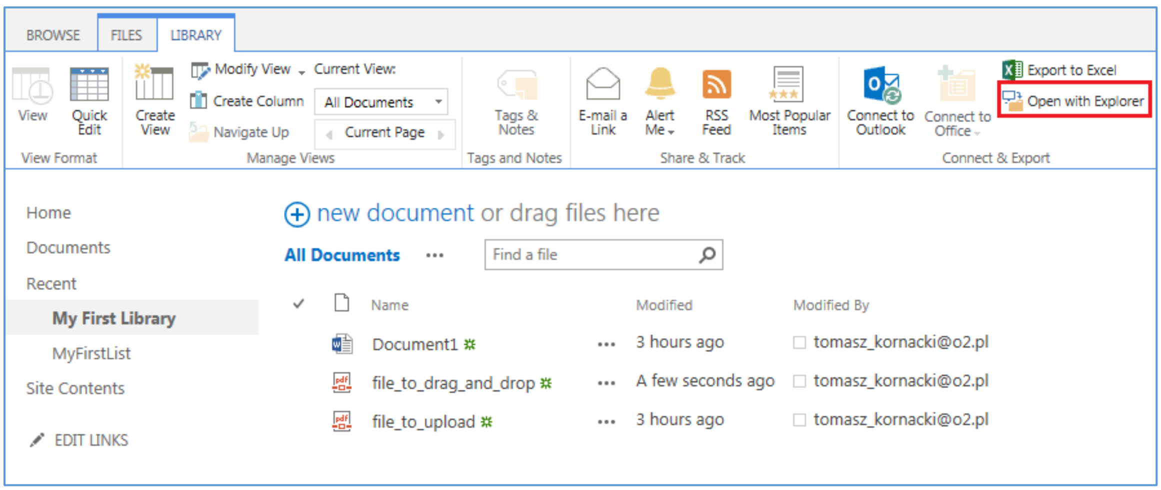


File is uploaded instantly to the library, but of course it doesn't have metadata filled-in, so it won't be visible to other users. In order to make it visible, all required columns need to be filled-in and the file should be checked-in. Check-in/check-out concept will be covered in next chapter.

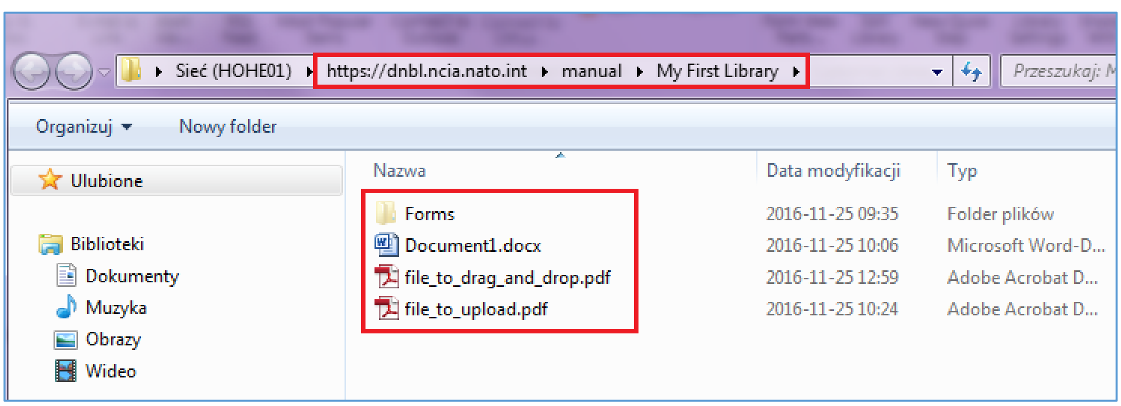


iv. Using file explorer

There is also more traditional way of managing files in the library. Library can be opened in explorer view and used like Windows folder. In order to trigger file explorer we have to use **Open with Explorer** command from SharePoint ribbon (LIBRARY tab).



SharePoint automatically opens folder showing contents of library in standard Windows file system representation.



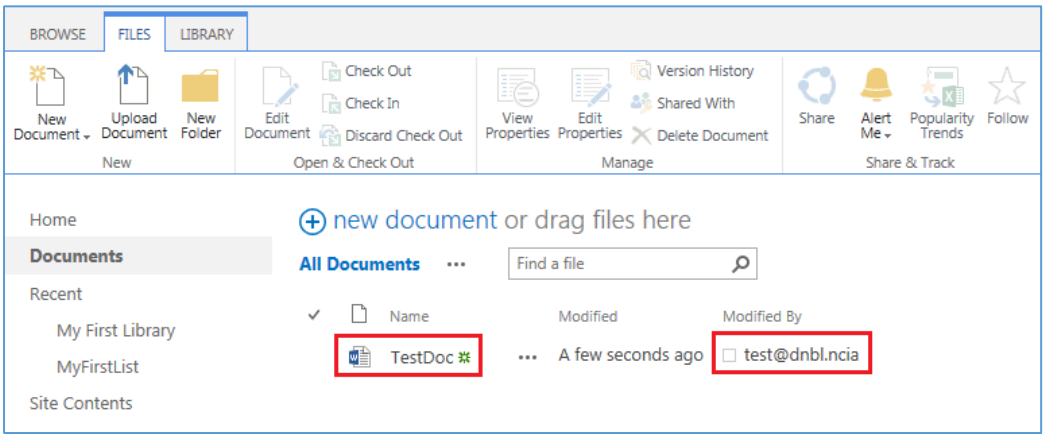
We can use all typical Windows commands here, like cut, copy, paste, keyboard shortcuts (CTRL+A, CTRL+C, CTRC+V etc.), context menu, drag and drop are also working like in any other folder from hard disk.

Open with Explorer command is enabled only when used in Internet Explorer, in other browser it will be disabled!

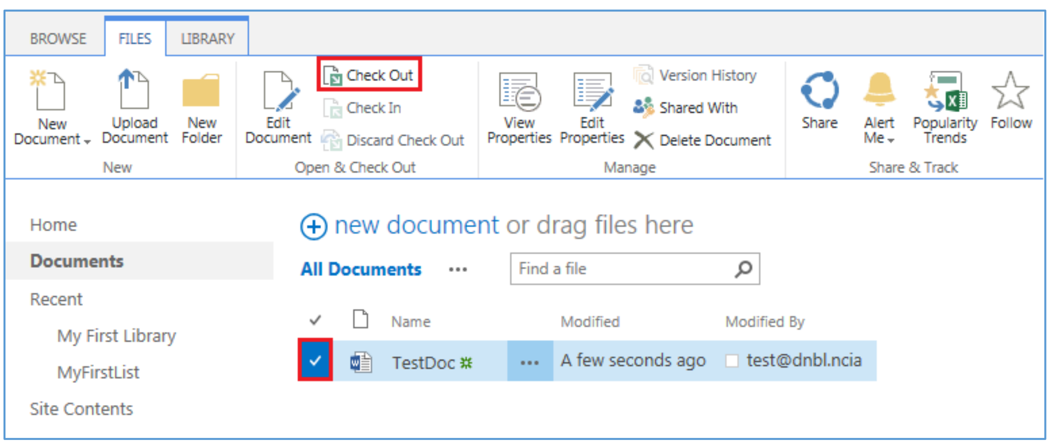
d. Check-in / check-out feature

Check-in / check-out is a part of bigger set of features in SharePoint called **document management**. In general, check-in and check-out allows users to lock / unlock documents, preventing users from overwriting each other’s changes.

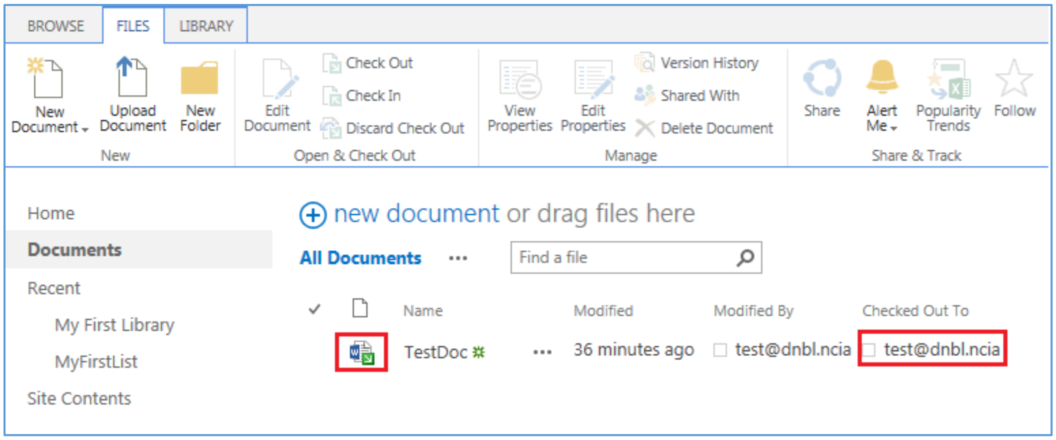
Let’s assume we have a document called **TestDoc.docx**. The document was previously uploaded to the library and is now available to all users.



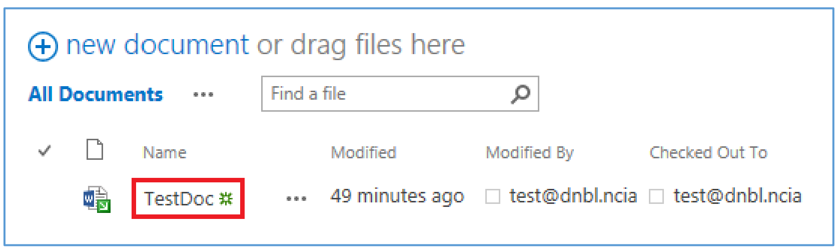
Now user called **test** wants to change document contents. User is checking-out the document to lock it in SharePoint library. It should be done with use of Check-Out command from SharePoint ribbon (document should be selected when using this feature).



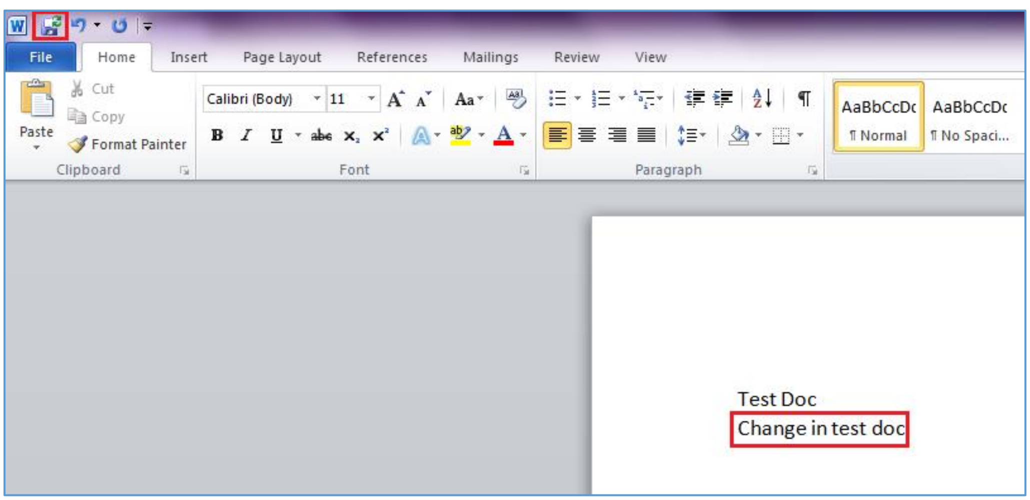
From now on document is exclusively checked-out and editable for test user and read-only for other users (this can be identified by check-out icon and value in **Checked Out To** column). Users can’t see test user changes.



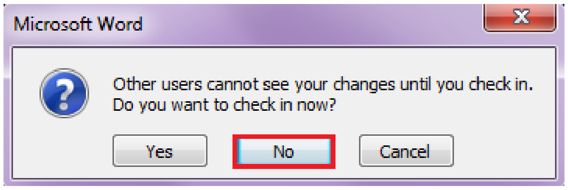
User now can click on document link under **Name** column and make changes to file contents.



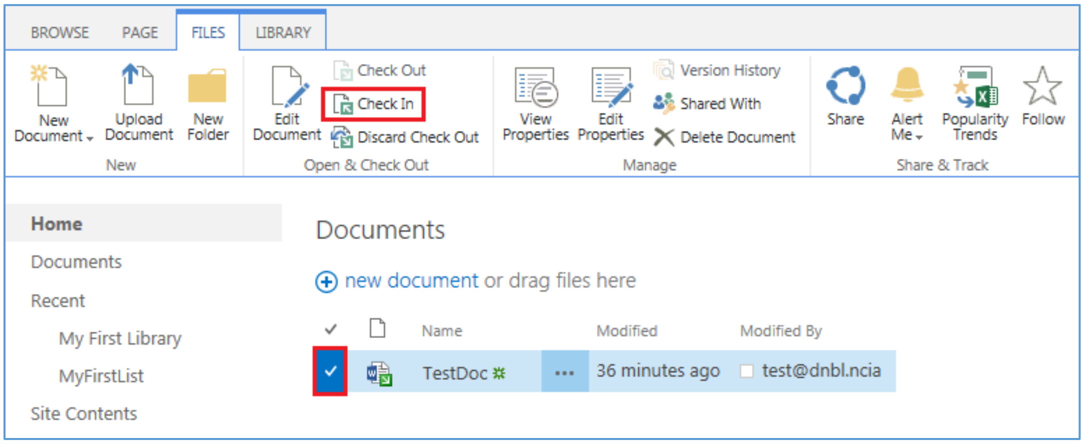
File will be opened in client application (Word in this case). When editing is done, file has to be also saved in client application.



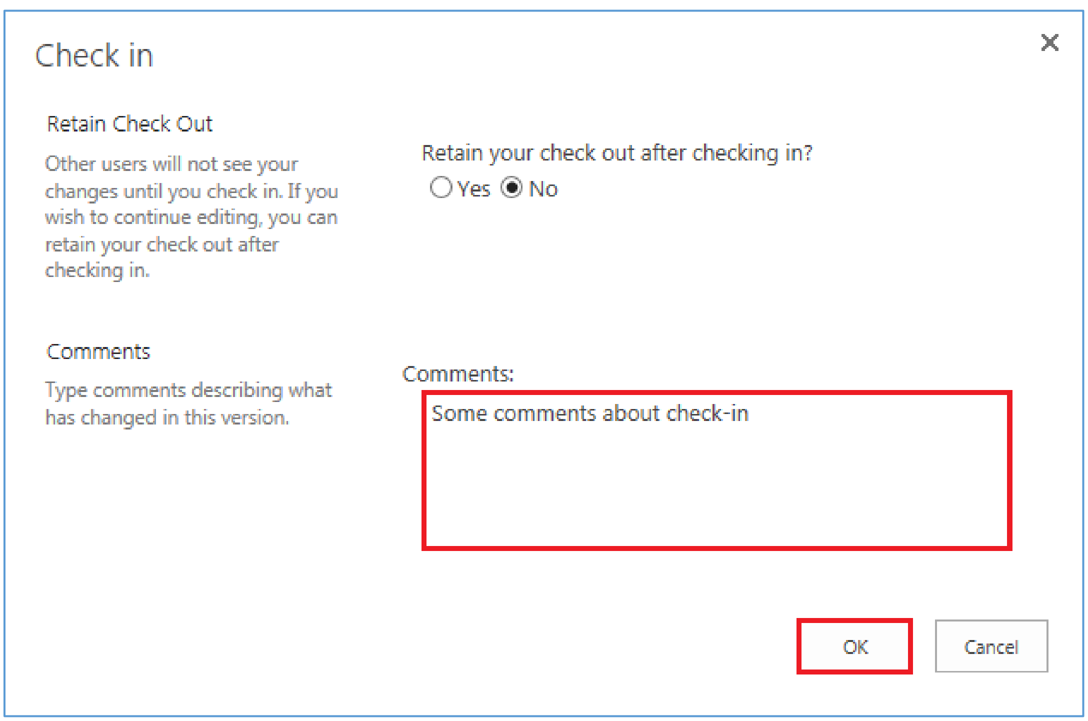
Changes are automatically uploaded to SharePoint library. User may be also asked for check-in action. If user decides to check-in at this stage, all changes will be automatically published and visible to other users. In this example we will do check-in directly in SharePoint.



User may decide to open and change contents of the files as often as he wishes. None of the changes will be visible until user implicitly checks-in the file. This can be done with use of **Check In** command from SharePoint ribbon (file has to be selected).

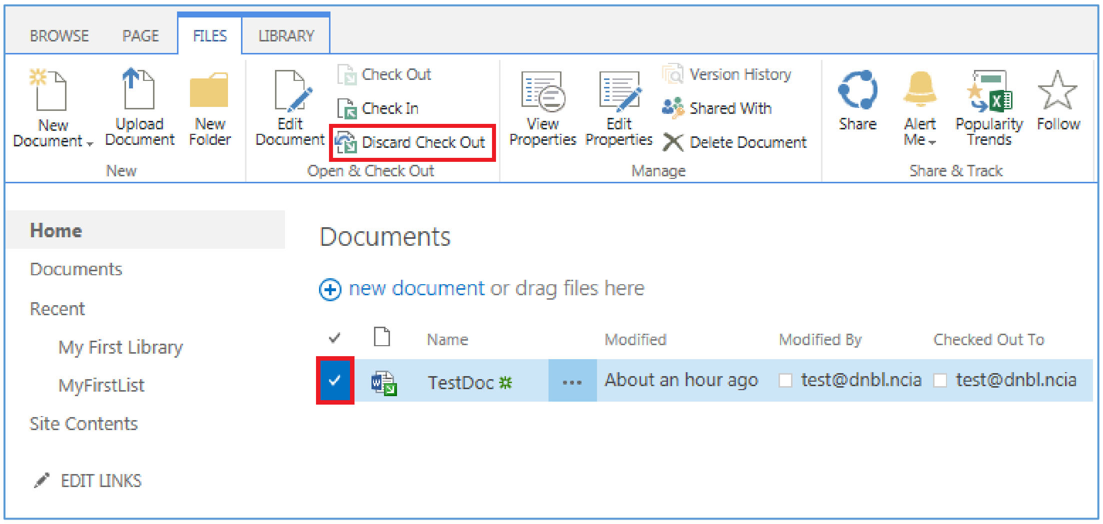


Optionally user can include comments describing what has been changed in the file.



When document is checked-in, all the changes are automatically published to other users, check-in icon disappears and **Checked Out To** column gets emptied. Check-out / check-in action can be repeated as many time as needed.

There is also option to roll-back changes made to the document since last check-out. To achieve that, command called Discard Check Out should be used.



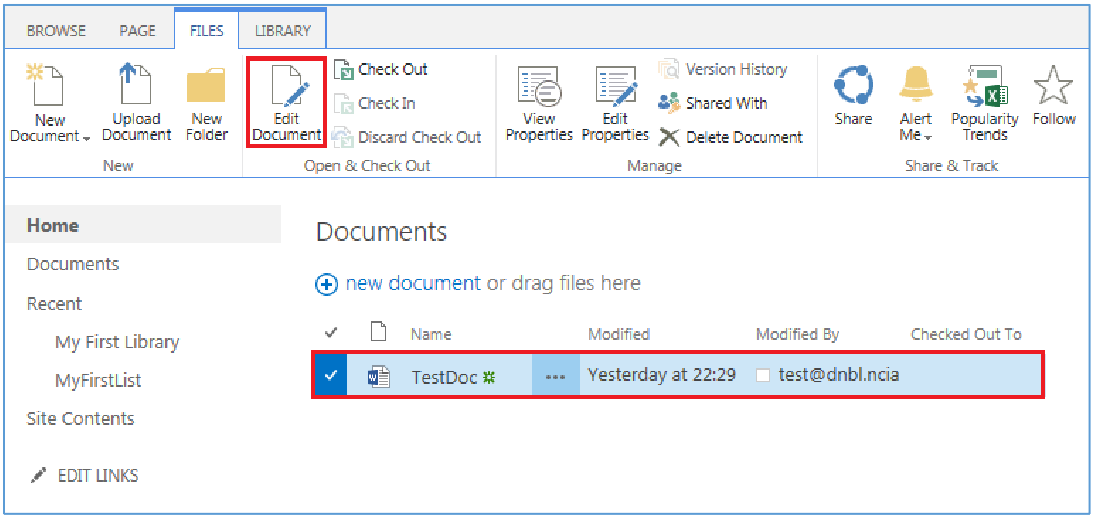
All changes are discarded and file is rolled back to latest checked-in version.

e. Editing documents

Editing documents is slightly different than editing list items. List items are not file-oriented. They are concentrating only on metadata (values in columns). Documents, on the other side, have both contents and metadata. That's why phrase **editing document** may refer to both editing document contents and editing document metadata.

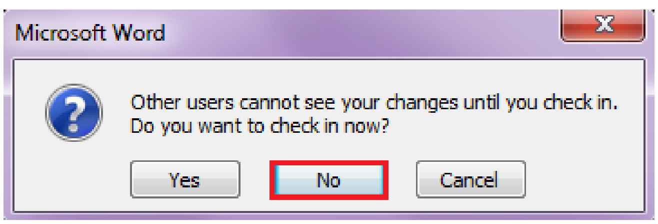
i. Editing document contents

To edit document contents, select it from the library and choose **Edit Document** from SharePoint ribbon.



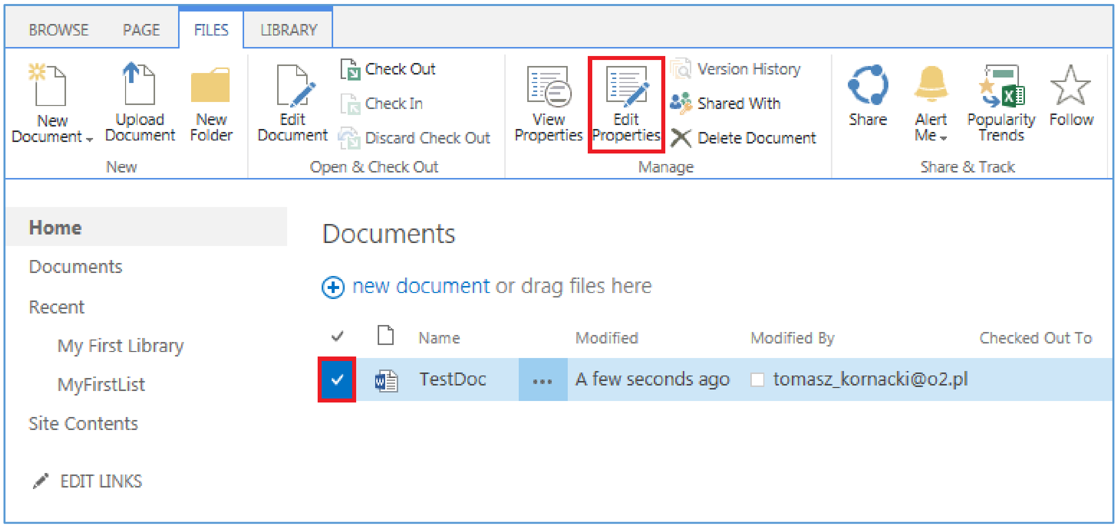
Document will be opened in client application (Word in this case) ready for editing. User makes changes to the documents and clicks on Save button in client application.

Changes are automatically transferred to SharePoint document library, optionally user will be asked if he wants to check-in the document right now and make it visible to other users. If No is selected user is responsible for checking-in the document from SharePoint library (this has been described in previous chapter).

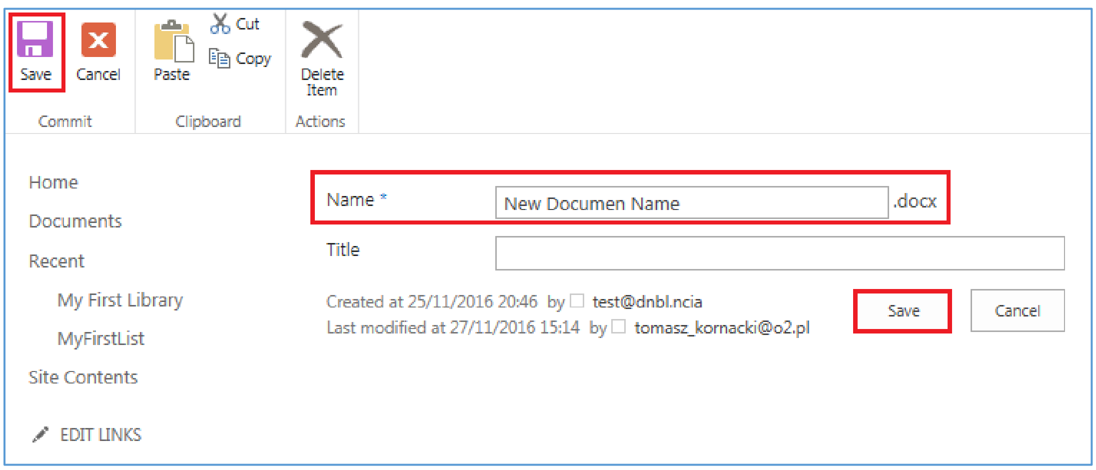


ii. Editing document metadata

Editing document metadata is a different story. Actual content of the document is not changed, we are just changing metadata describing the document (for example document name). In other words we are changing column values of list item representing the document. In order to change document metadata we select the document in library and click on **Edit Properties** command from SharePoint ribbon.



User will be redirected to edit form for list item, where column values can be changed. After changing desired values, we need to click on Save button to preserve the changes.



Editing document properties doesn't cause file to be checked-out automatically (like it happens when document contents are changed).

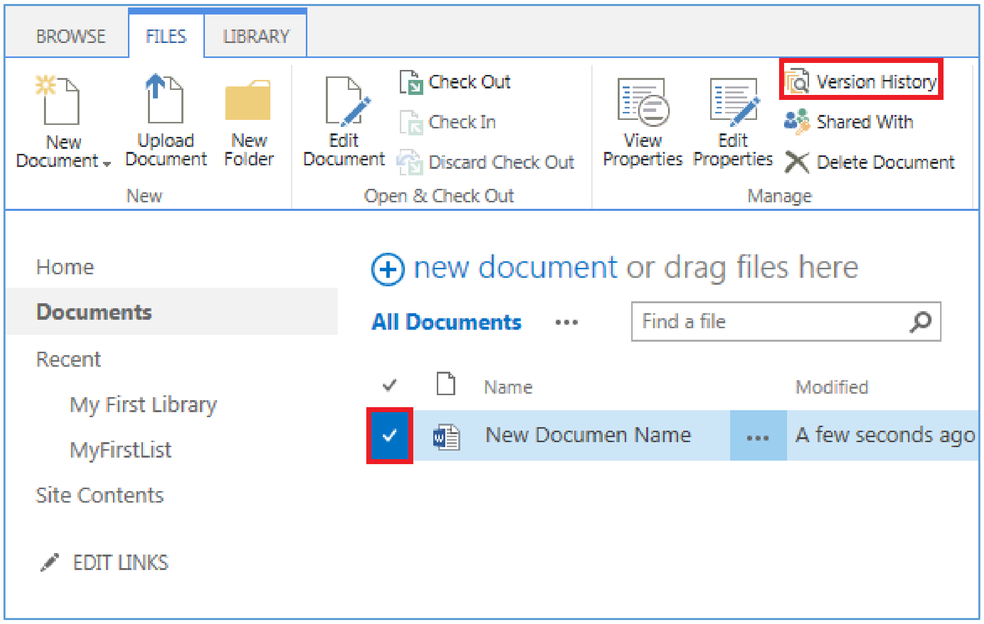
f. Version history

i. Introduction

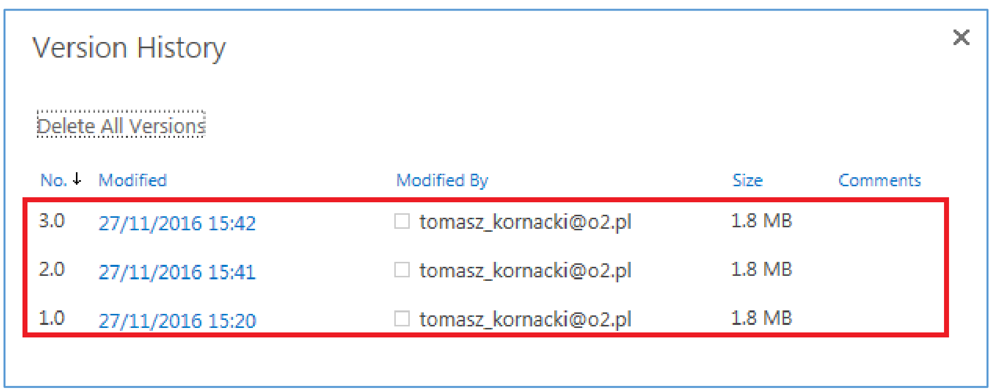
Assuming that versioning is enabled for list (or library) each check-out operation causes list item version to be increased. Thanks to versioning mechanism SharePoint is keeping track of changes to document from the very beginning, when document is uploaded to the library.

ii. Viewing version history

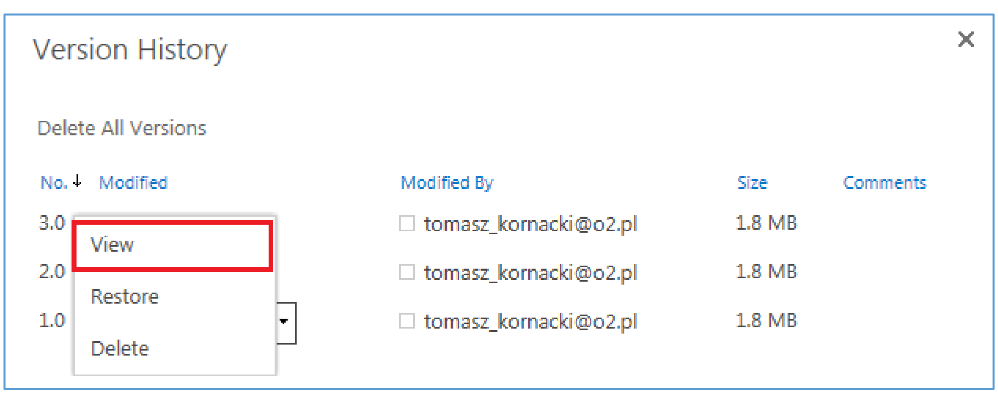
In order to view version history for list item (or document) user should select the item in library and call Version History command from SharePoint ribbon.



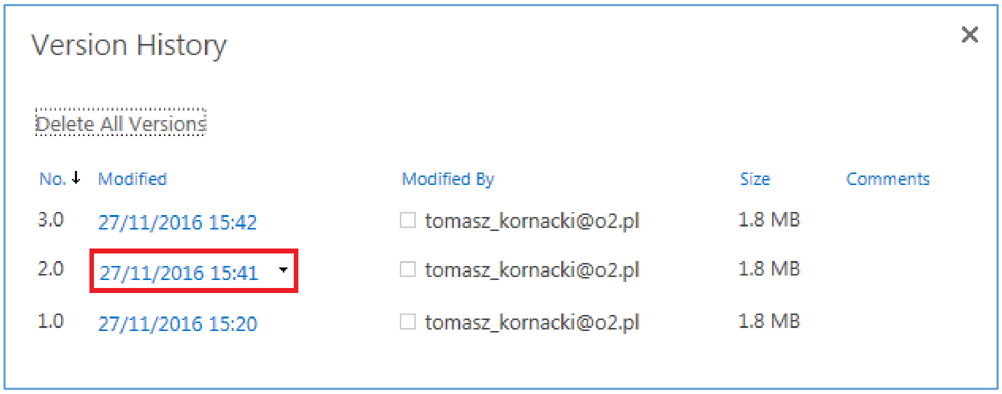
Version history popup shows list of versions for selected file from newest to oldest and some basic information (like who and when created each version).



Each version has its own command drop down, which helps to manage each version separately (for example View option allows to display selected version metadata).

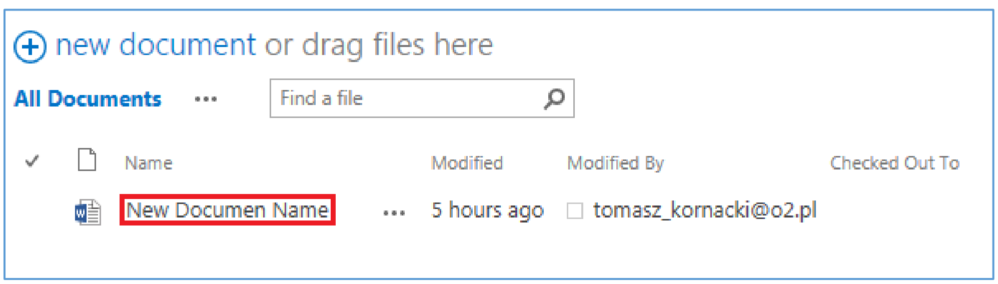


When we're dealing with documents we can open different versions of document by clicking on link in **Modified** column.

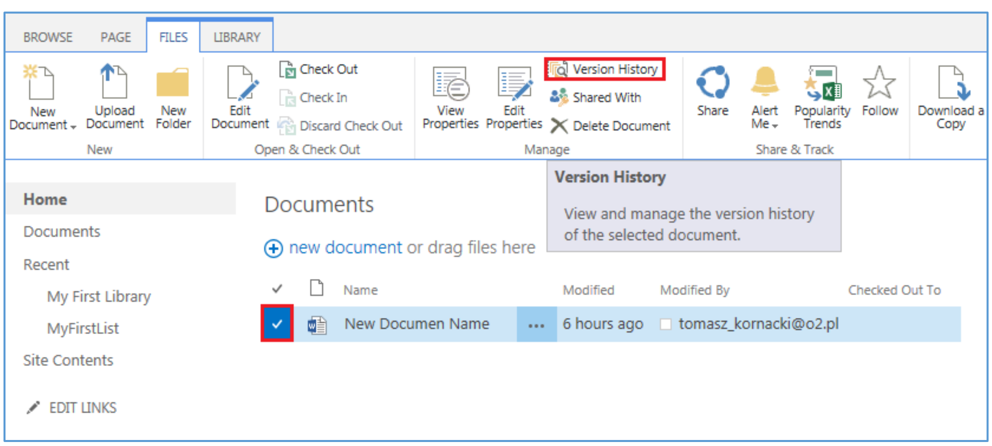


iii. Restoring previous version

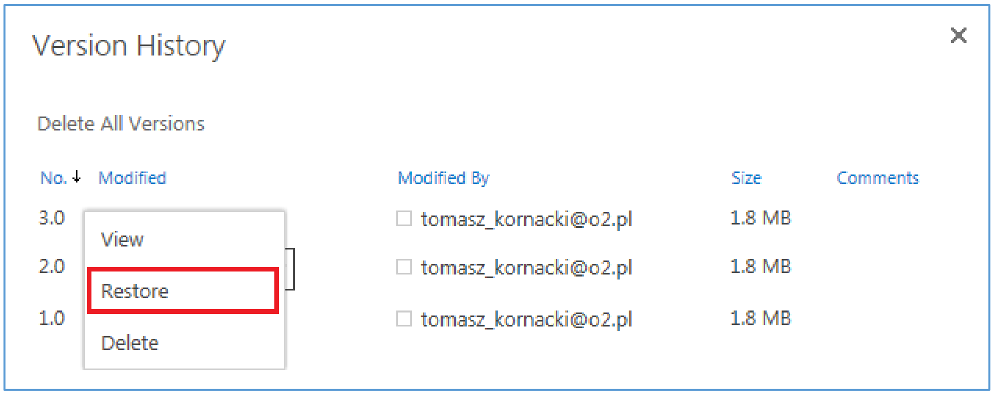
Restoring previous version of list item (or file) sets the previous version to be current version of the file (in other words, the version that will be now visible to other users when they click on link in file name). This option may be useful when we have checked-in version of the file and later we decide, that the changes we have made are not appropriate (and therefore we want to roll-back to previous version).



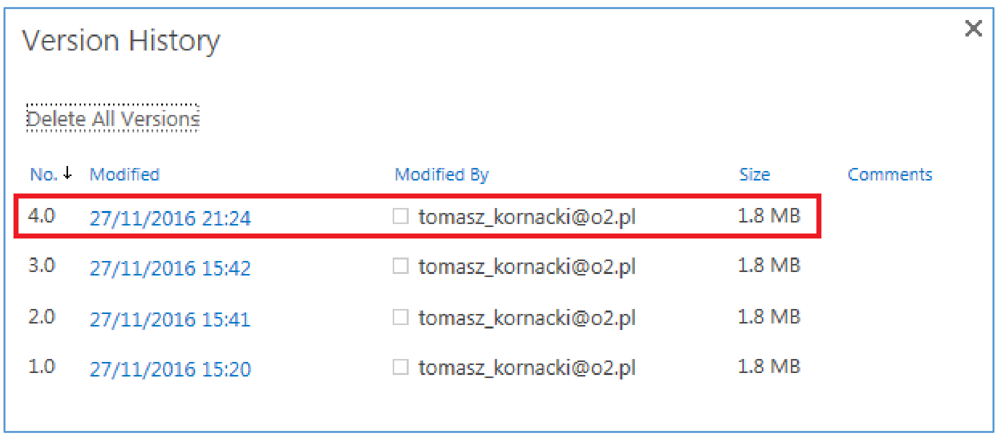
To roll back to any of previous version we have to enter version history, by clicking on Version History command from SharePoint ribbon (list item should be selected first).



From version list we should choose which version should become the current version, expand drop down menu and choose Restore option.

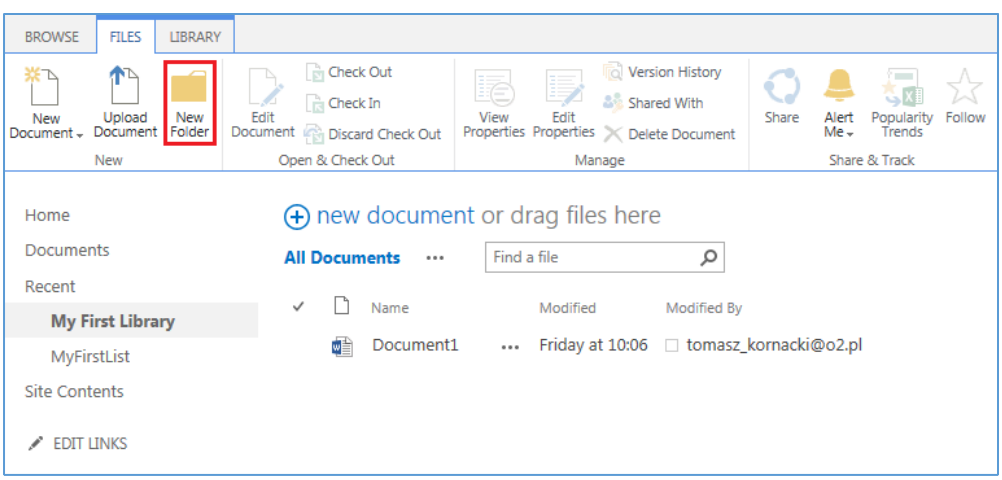


Version will be restored to the version selected from previous versions. In fact there will be new version created, with metadata (and file if it's document library) copied from selected version. In other words, all previous versions will stay as they are, no version will be removed or overwritten.

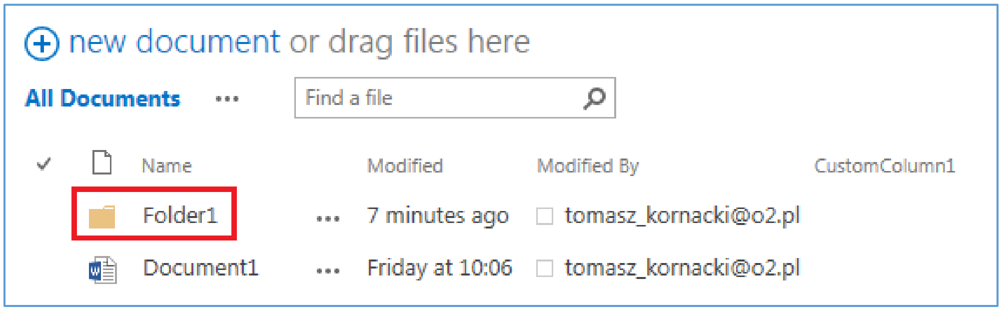


g. Folders

Document libraries and lists can be organized in more complex structures of files (or list items) with use of folders. Folders in general improve performance and navigation. New folders can be created with use of New Folder command from SharePoint ribbon.

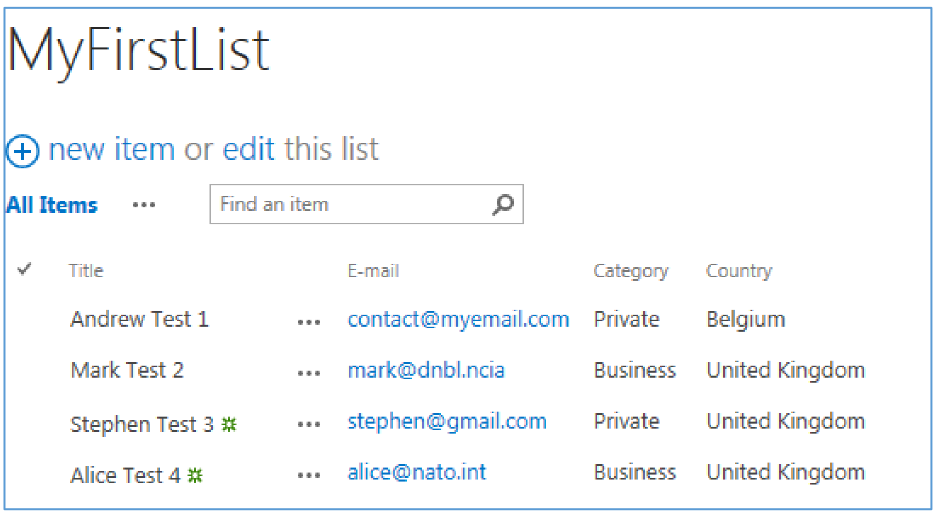


In Create a new folder popup, name of the folder should be specified. Clicking on Save button will create in in library (name of the subfolders within the same folder should be unique).



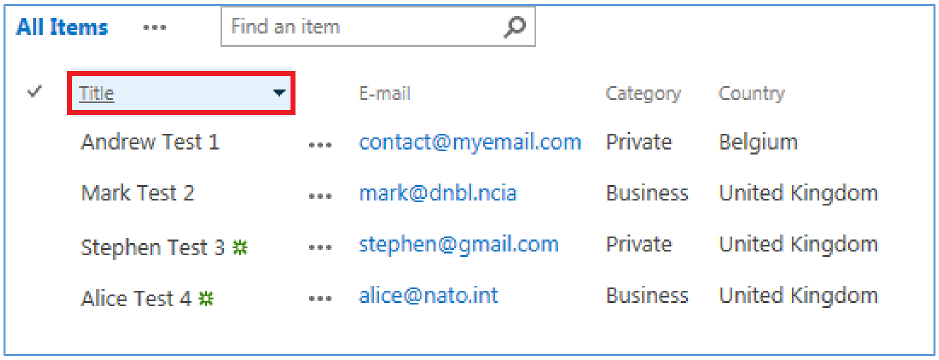
h. Sorting and filtering in a list

Sorting and filtering are two clever mechanisms of finding information in SharePoint list. They are automatically built-in to every list or library created in SharePoint. For these examples we will use contact list created in one of the previous chapters.

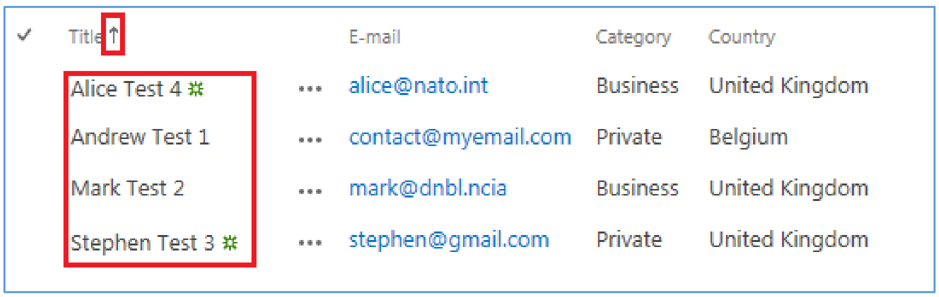


i. Sorting

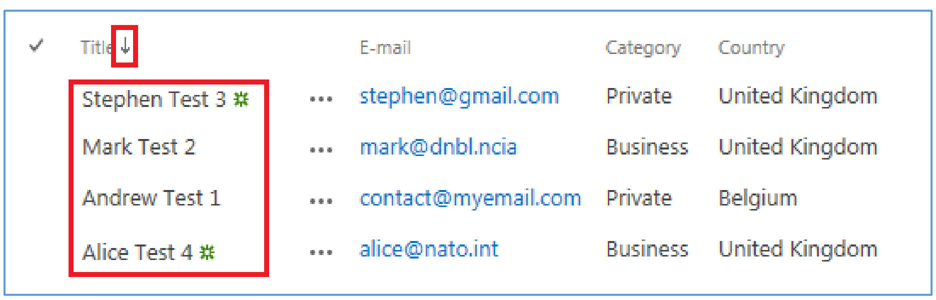
Lists can be sorted based on one of the columns from the list. To sort by column in context of SharePoint list means to order rows based on values in one particular column. In SharePoint list view clicking on column header causes list to be sorted based on this column.



Sorting is applied instantly and view refreshes itself to show rows (list item) in right order. Small arrow next to the column name indicates which column is currently used for sorting and which sort direction is applied (in this example ascending direction).



Clicking again on the same column changes direction of the sorting to opposite value (from ascending to descending in this example).

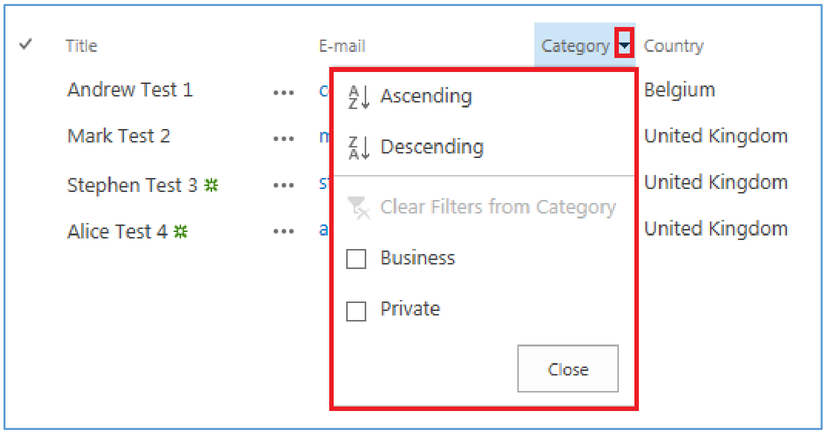


This example shows how to sort at runtime, these actions are not preserved, therefore if we navigate to another location within the site and come back to this list default sorting will be applied.

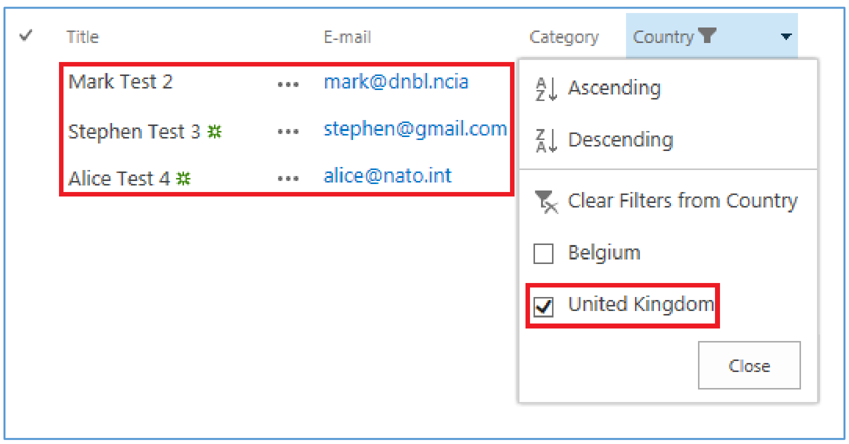
ii. Filtering

Sorting doesn't affect contents of the view, it just reorganizes list items (rows) to make them appear in order that suits the user. Filtering, on the other hand, controls which rows are actually displayed to the user. Filtering helps to simplify list view and to show to the user only rows he's interested in.

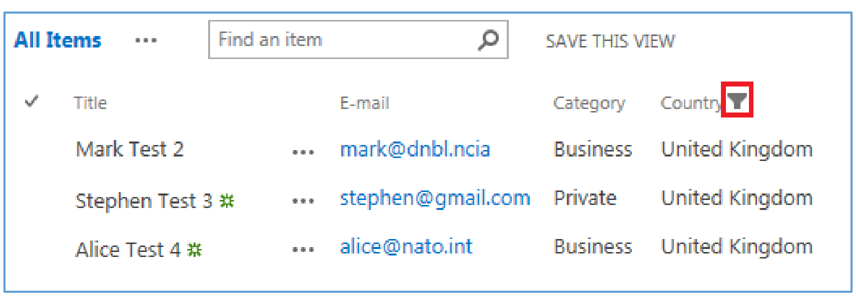
To apply filter to the list view based on specific column, hover over that column and click on small arrow to expand sorting / filtering menu.



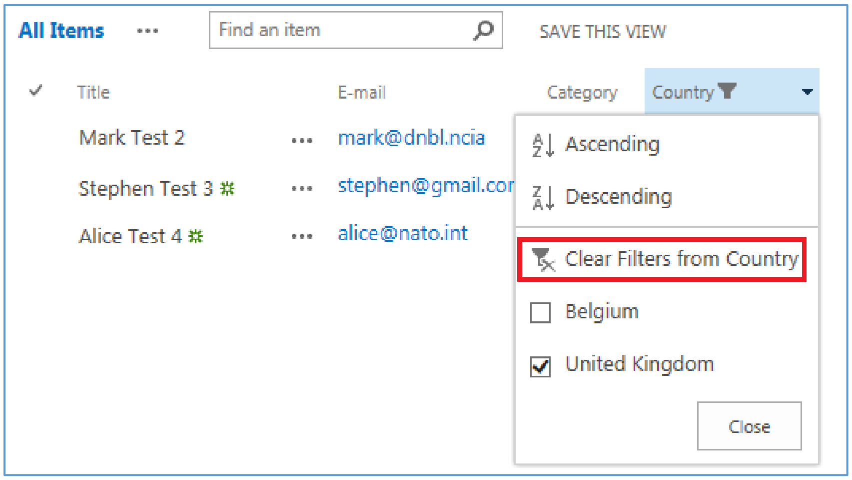
User can select one or more checkboxes indicating which values he's interested in. List is automatically filtered out from items that doesn't pass the filter.



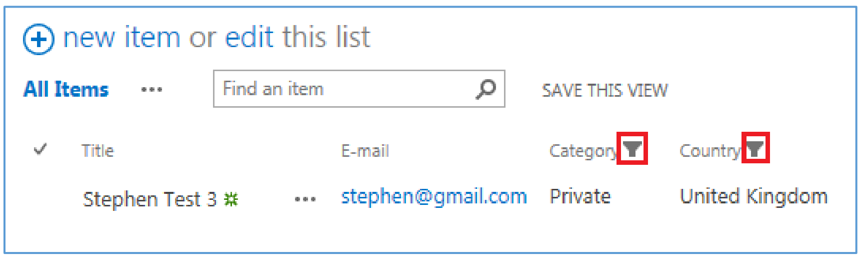
We can identify that list view is filtered by column by small filtering icon next to column name.



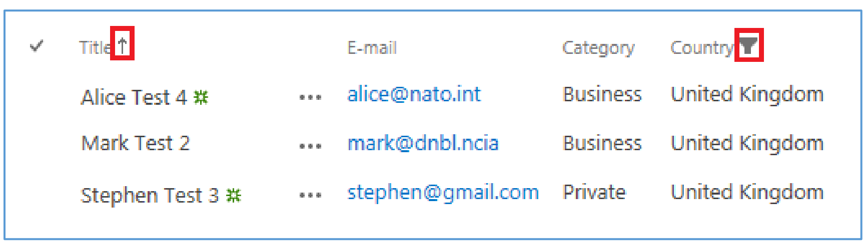
Column can be cleared from filters with use of **Clear Filters from COLUMN NAME** button (in this case Country)



There is also possible to filter on more than one column at the same time. Below example of filtering on Country (= United Kingdom) and Category (= Private).



Filtering and sorting can be used together. We can filter list view by the column and then sort result set by the same (or the other) column.



This example shows how to filter at runtime, these actions are not preserved, therefore if we navigate to another location within the site and come back to this list all filters will be cleared.

i. Views

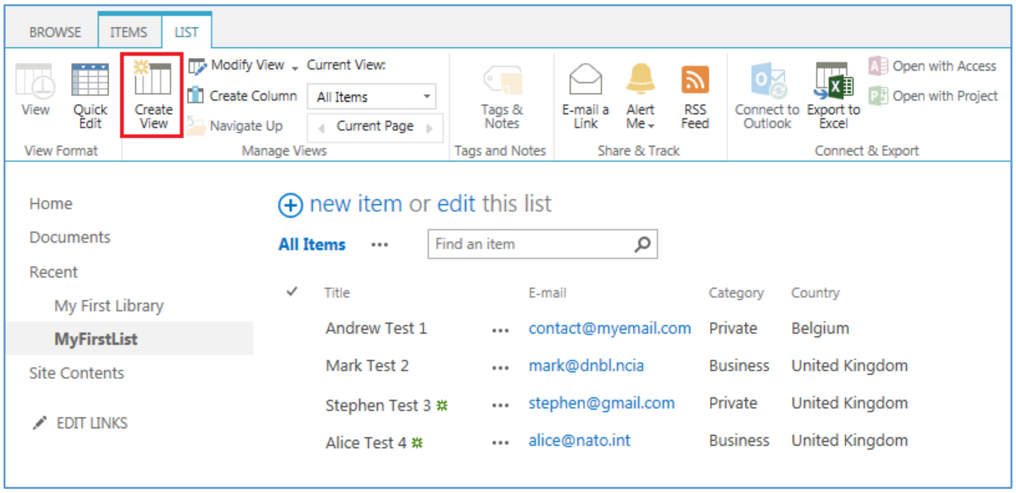
i. Introduction

Sorting and filtering in list view shown in previous chapter are done in place. It means that users dynamically configure default list view to see what they want to see at the moment. When they leave the page and go back to the page after some time, the view will be defaulted and it will not show any previous setup for filtering and sorting.

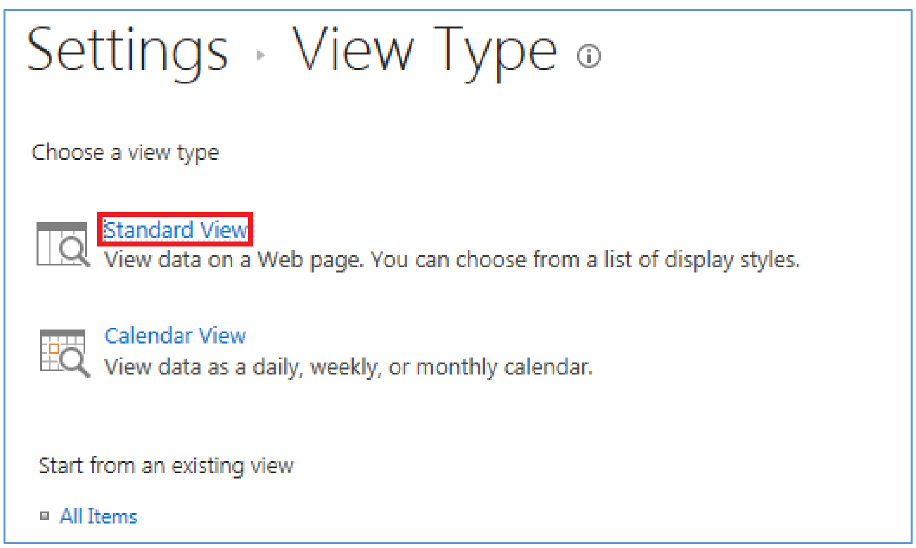
SharePoint view is an entity that helps to preserve custom settings for list view. Views are much more advanced, they offer much more than just sorting and filtering (like grouping, custom styling etc.).

ii. Creating a view

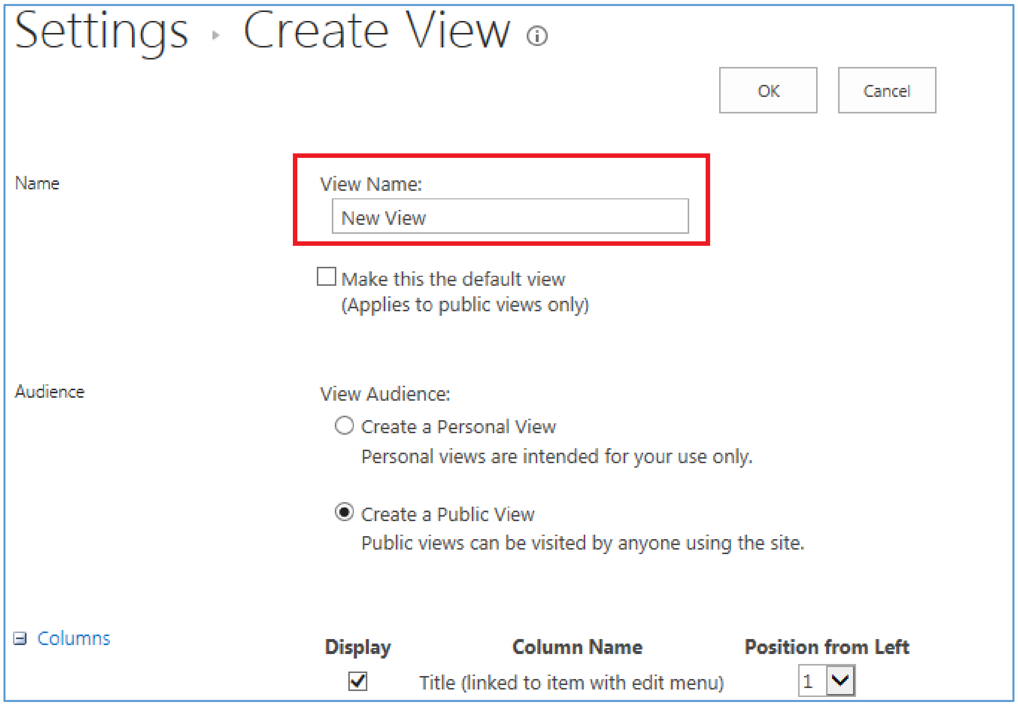
New view can be created with use of Create View command from SharePoint ribbon.



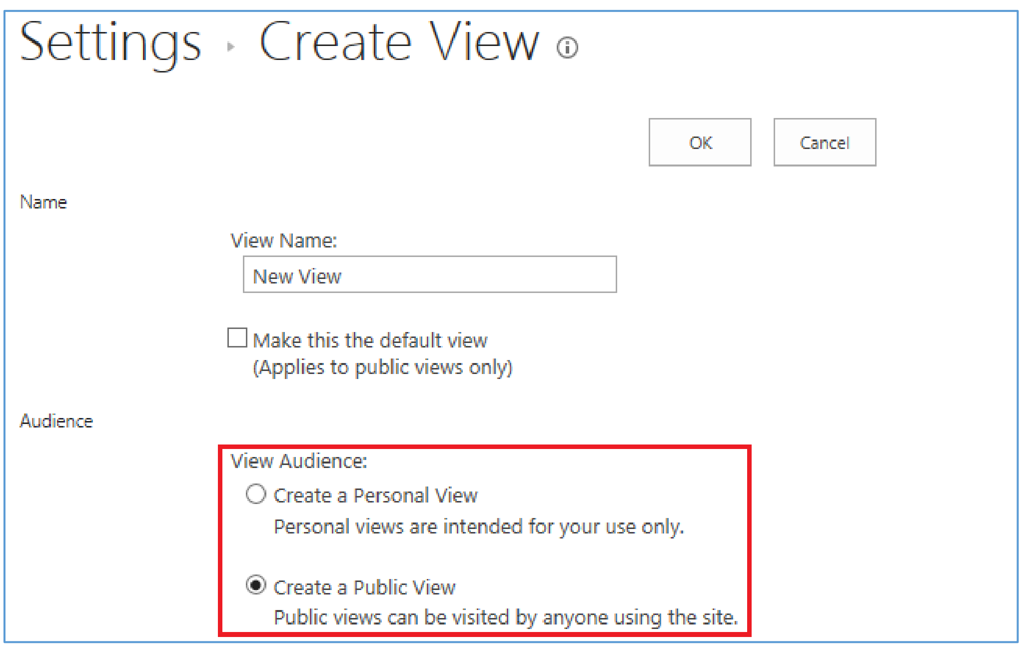
Next step is to choose base view. We'll choose Standard View here since we want to customize our new view from scratch.



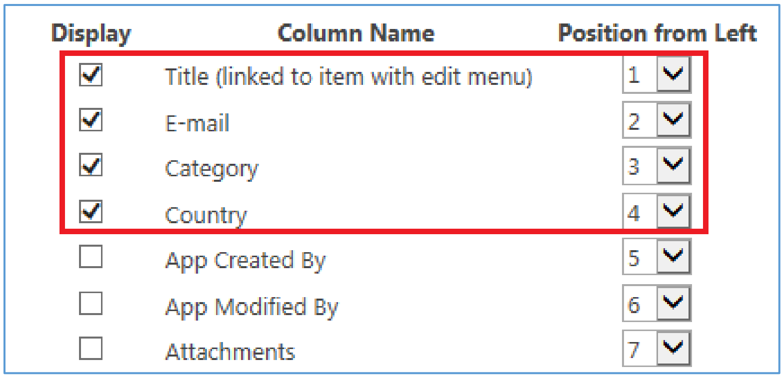
The name for new view should be provided.



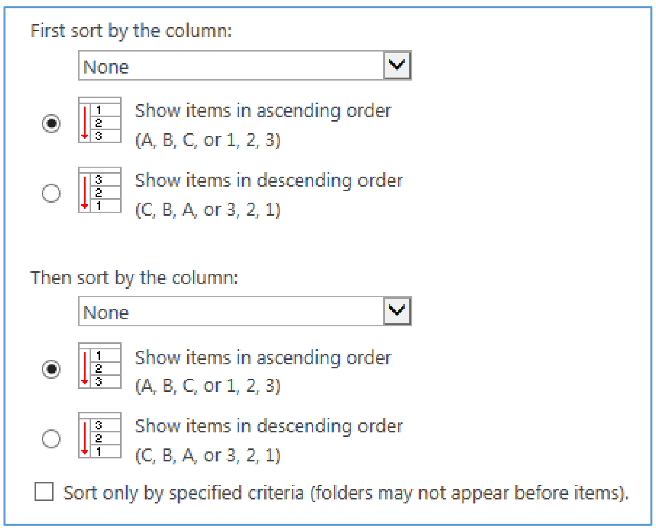
View can be either public or personal. Personal view can be created by any user, it will be available only for him. Public view can be created by user with **Design** permission level and it will be available for all users with access to the list.

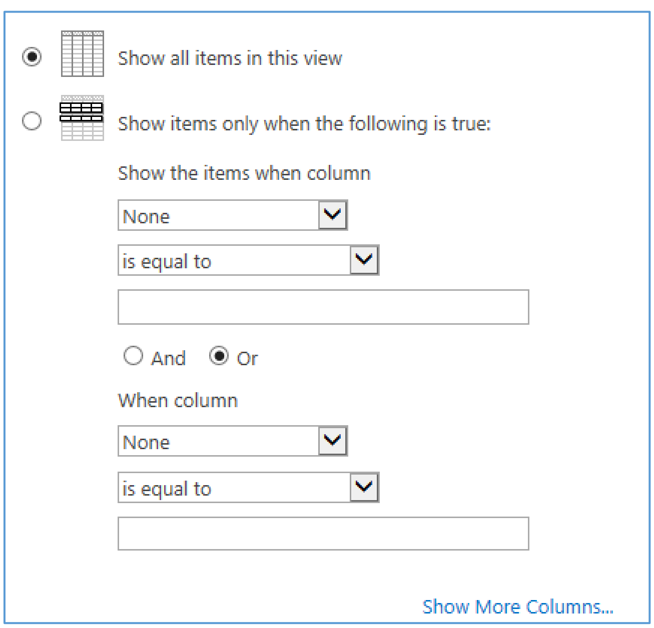


Below we can select which columns should be included in the view and what should be the column order.

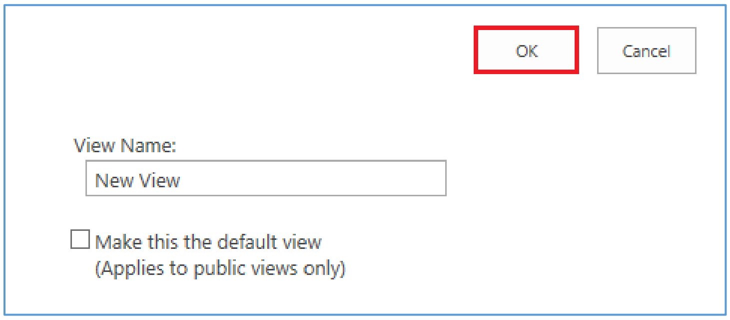


Then we have controls to setup sorting and filtering the view.



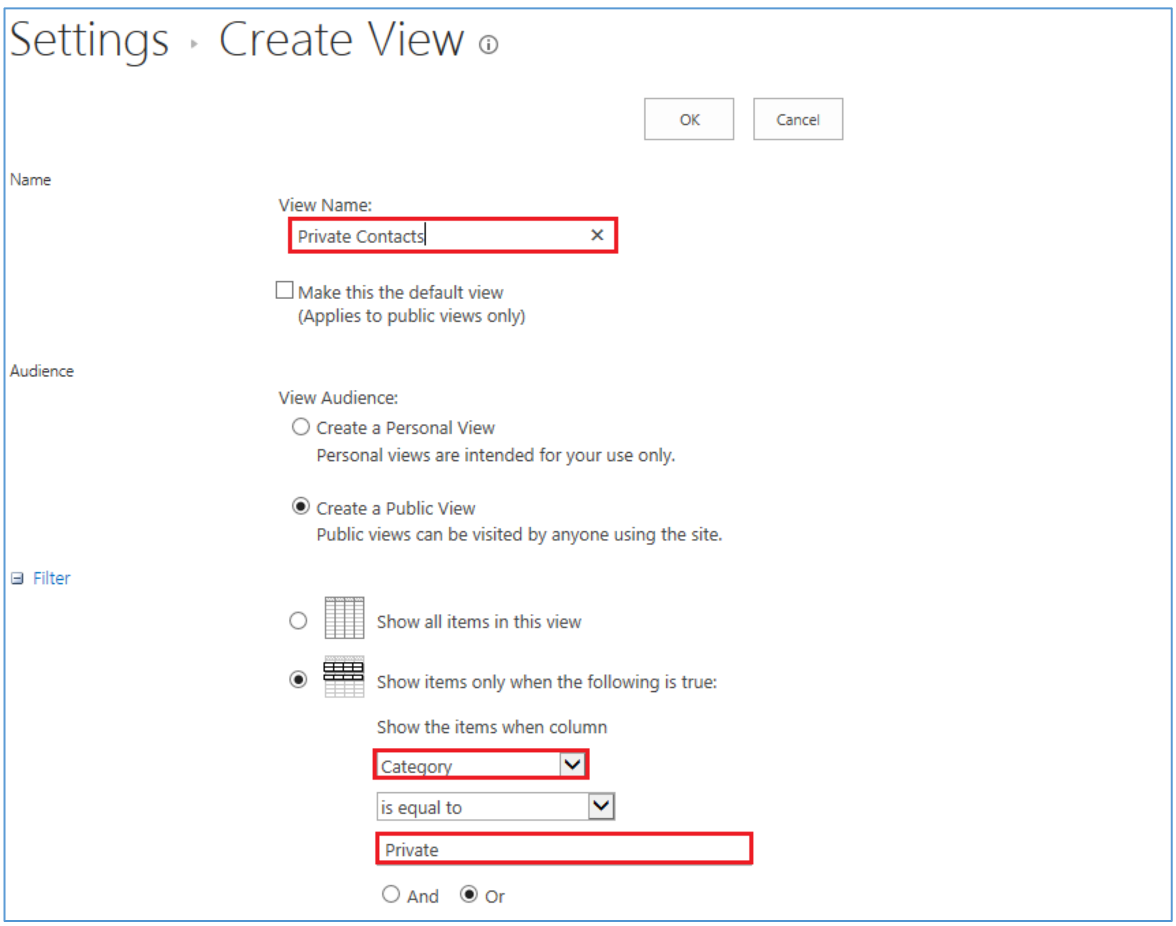


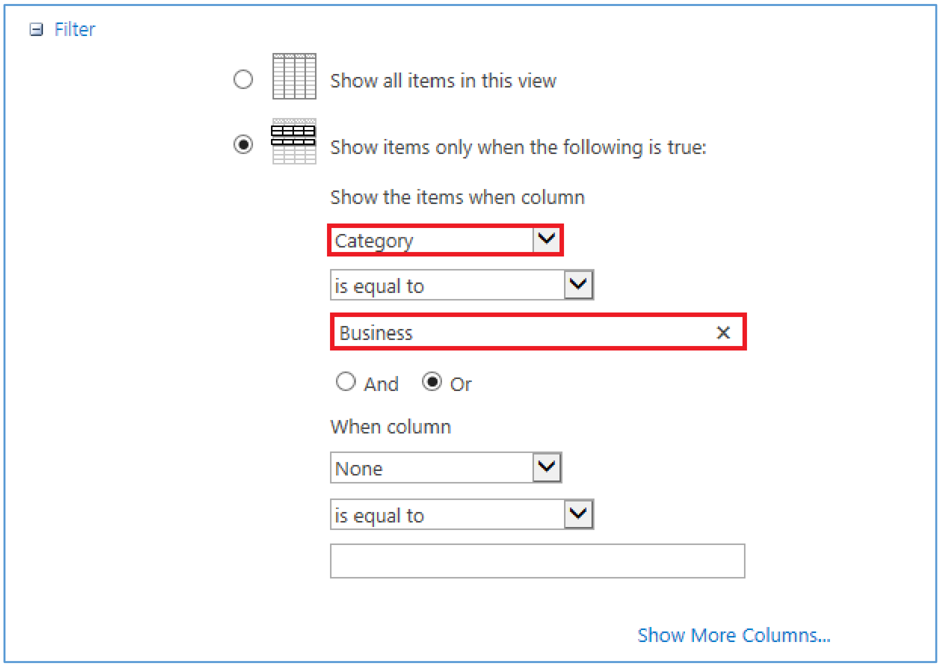
Other options will not be described in details here. When ready click on OK button and new view will be created.



It may be good example to have different views for private contacts and business contacts in contact list. It's very likely that we will not use them at the same time.

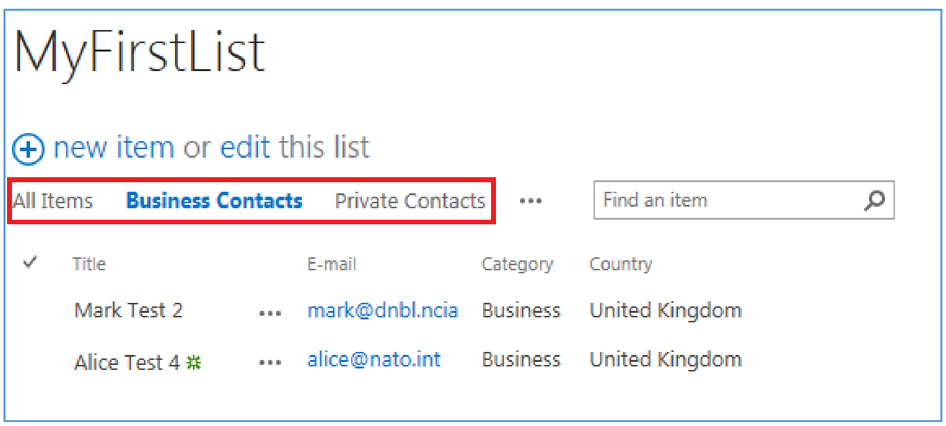
We can go through steps described above and create two views for this purpose.



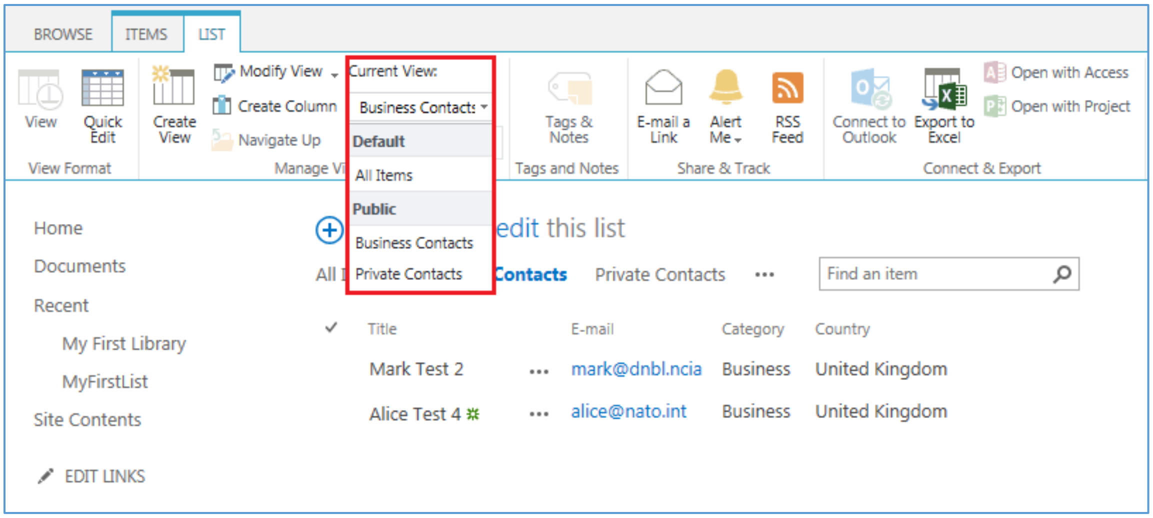


iii. Switching between views

To switch between different views of the same list we can use shortcut links above the list view.

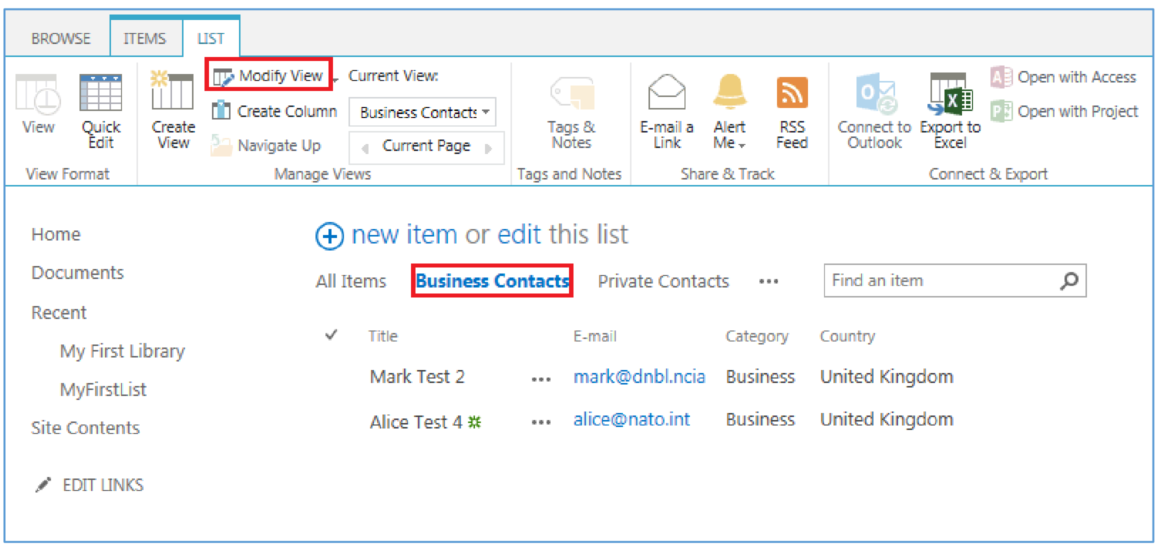


The same result can be achieved with use of Current View drop down.

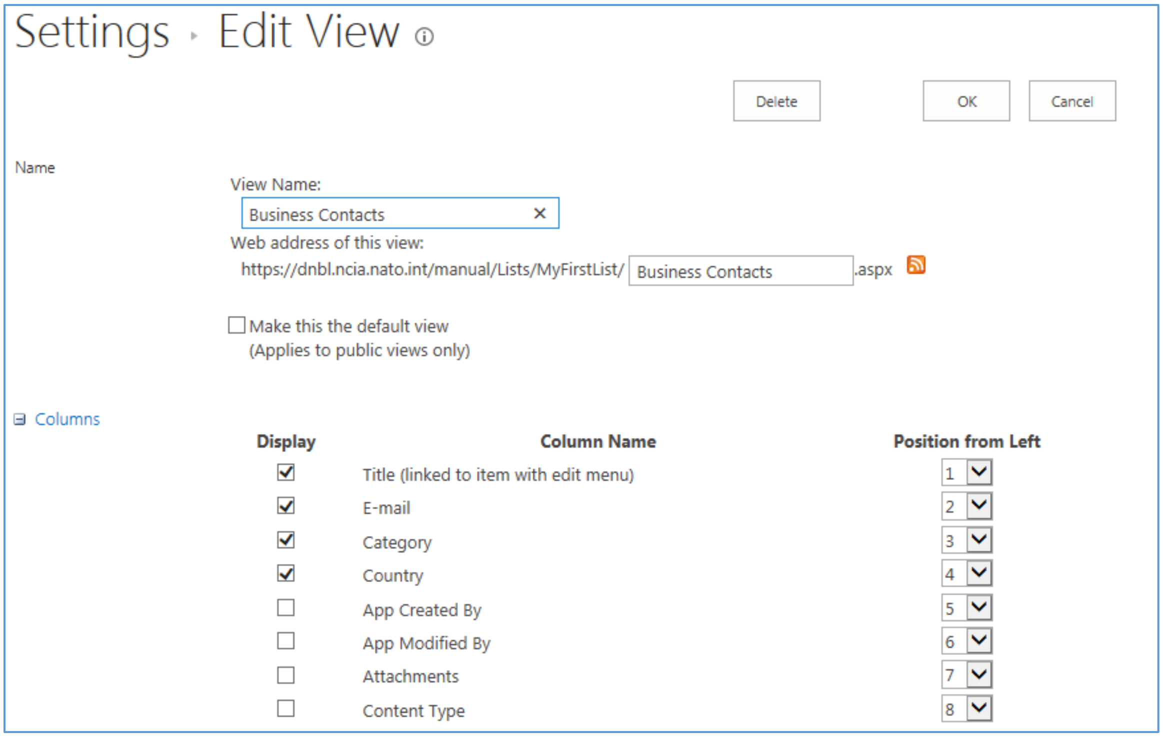


iv. Managing existing views

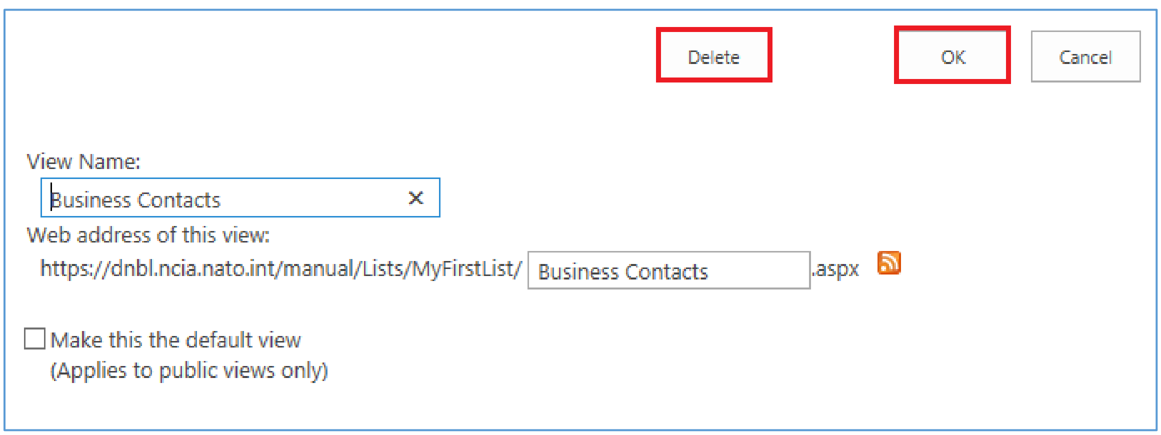
When browsing particular view, there is a command on SharePoint ribbon called **Modify View**.



This command redirects user to view edit page (it looks exactly the same as page for creating a view).



All changes have to be saved with use of **OK** button. There is also **Delete** button, which can be used to permanently remove the view.

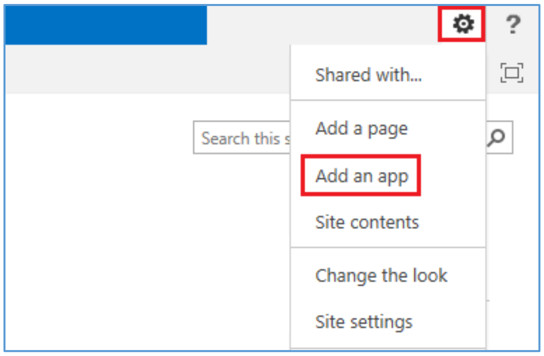


4. Built-in list templates

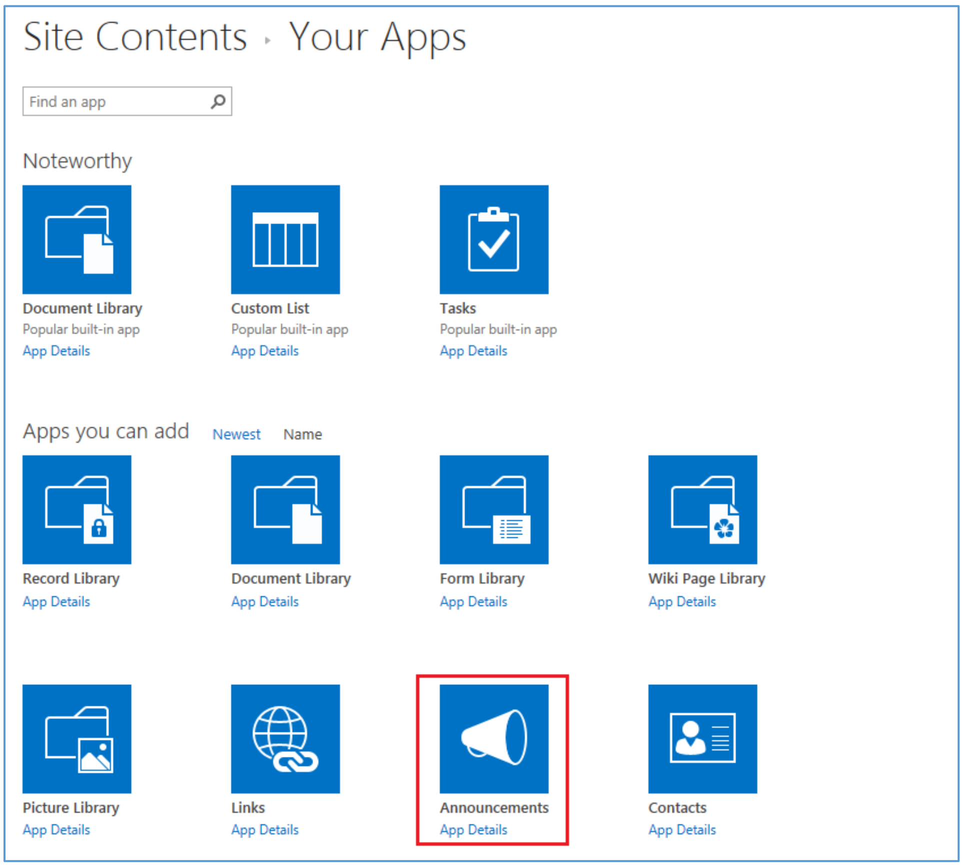
a. Announcements

i. Creating announcements list

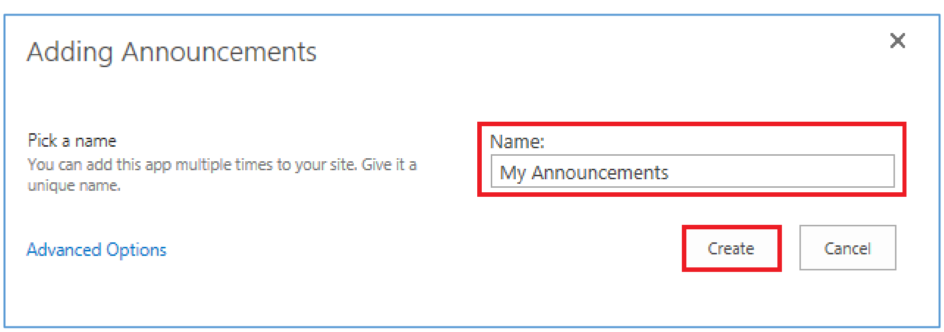
Announcements list can be created with use of **Announcements** template. Creation page is available under **Add an app** page.



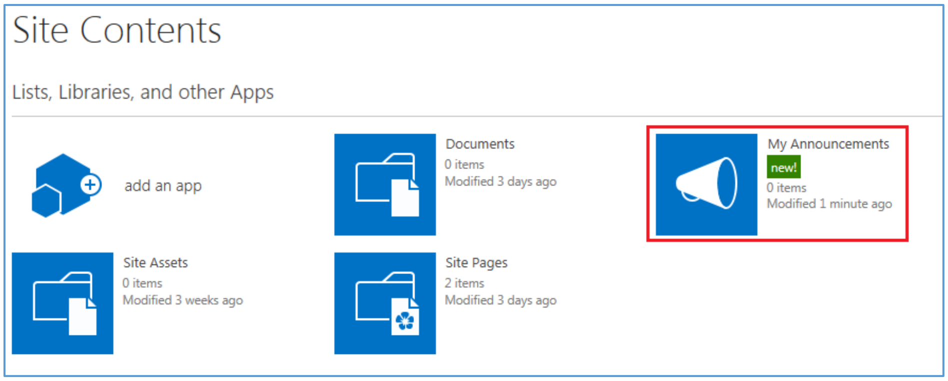
From this page we select **Announcements** app.



We provide name for new announcements list and click on **Create** button.



Announcements list is successfully created.



ii. Announcements fields

There are three significant column in announcements lists.

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type
Title	Single line of text
Modified	Date and Time
Created	Date and Time
Body	Multiple lines of text
Expires	Date and Time
Created By	Person or Group
Modified By	Person or Group

Title column – headline of the announcement, it should explain what is the topic of announcement

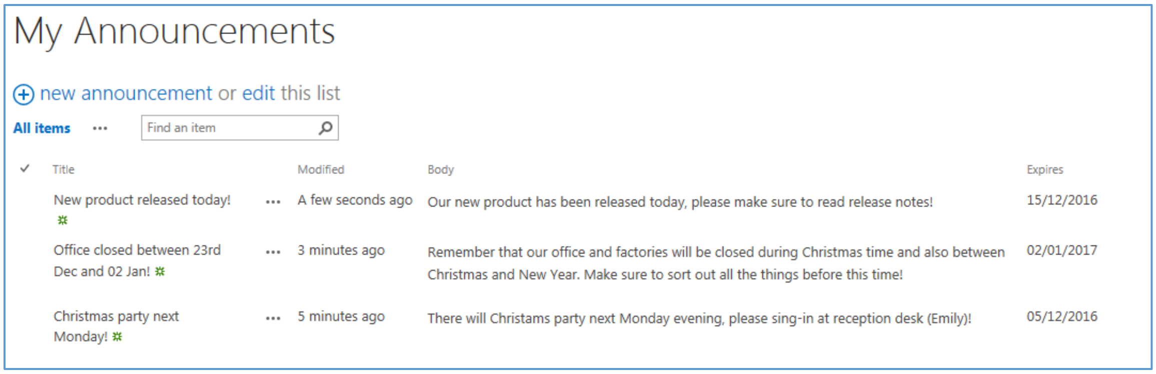
Body column – actual contents of the announcement, this is what users see when they click on title

Expires column – this column helps to determine when the announcement gets outdated

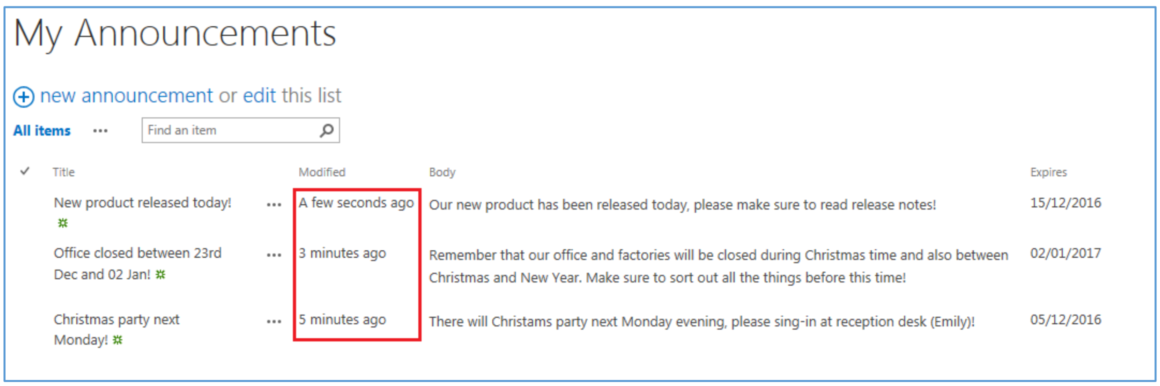
iii. Setting up default view

Announcement usually is not everlasting. In this example we make use of Expires column to limit displayed announcements only to actual ones.

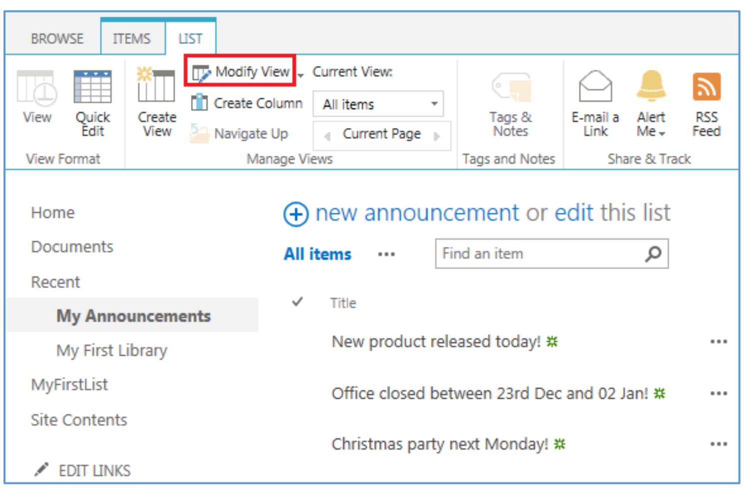
Let’s start with existing announcements list and some sample announcements added to it (note the values in Expires column).



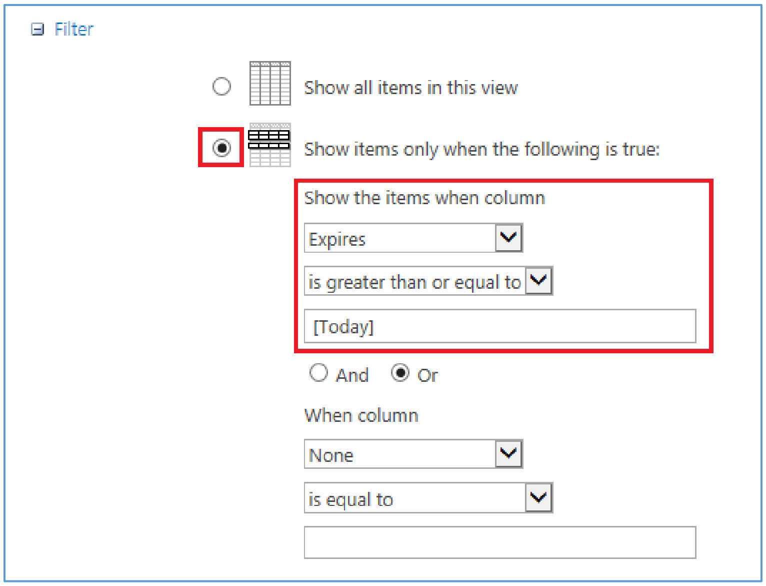
It's also worth noticing that announcements are sorted by **Modified** column by default.



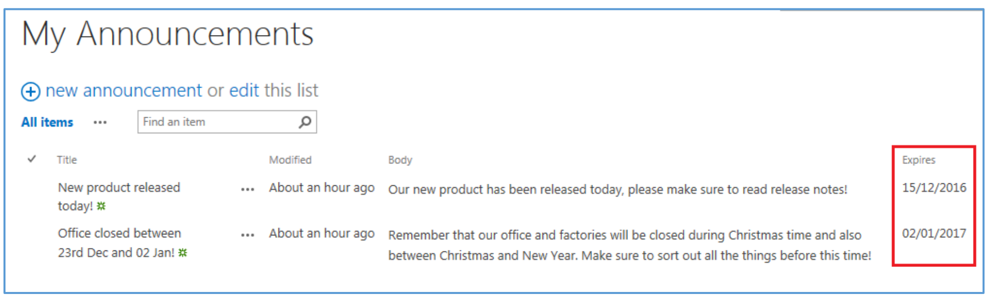
We will modify the view to filter-out all the announcements that are expired.



In **Filter** section we set filtering based on **Expires** column (to hide all announcements for which expire date is earlier than current date).



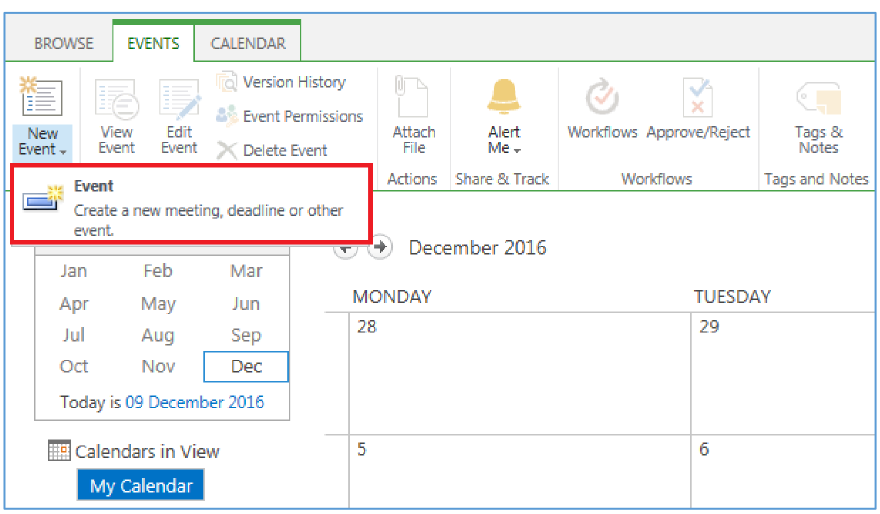
The list view will now show only relevant announcements.



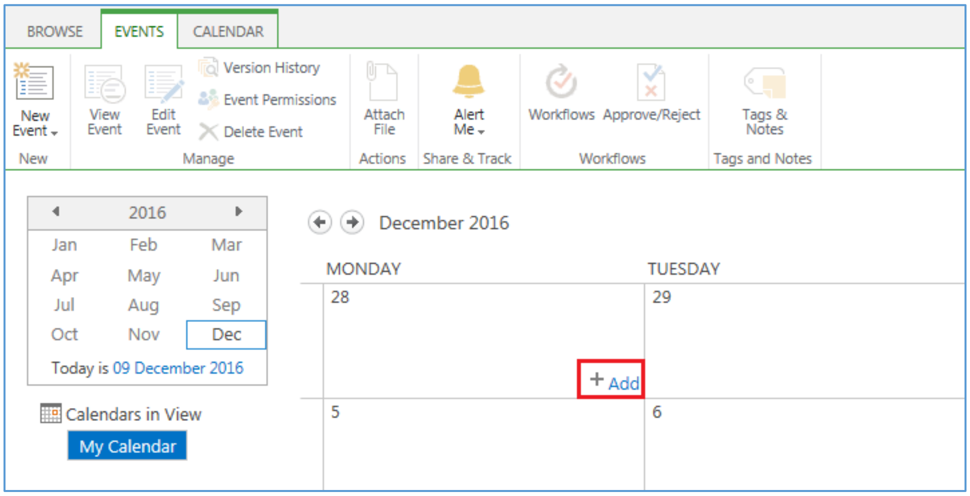
b. Calendar

i. Adding new events

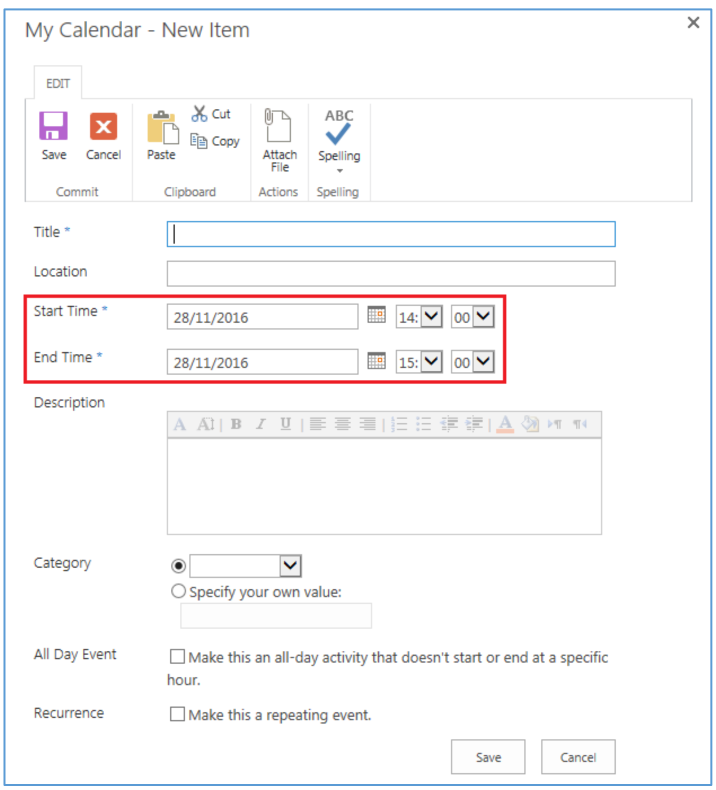
There are several ways of adding new events to the calendar. One of them is standard SharePoint ribbon button called **New Event**.



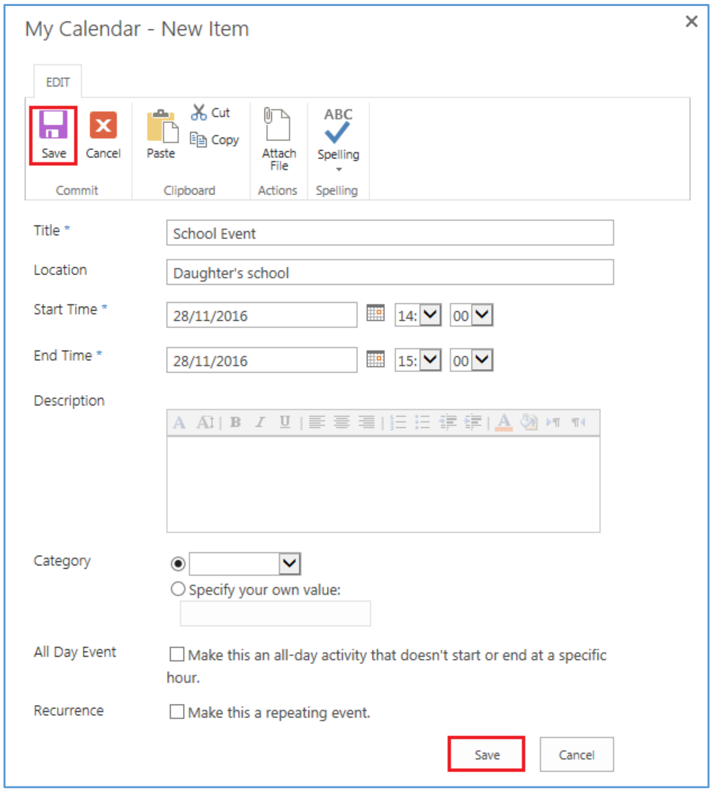
From calendar view the same can be achieved when clicked on Add link (the link appears when hover over a day).



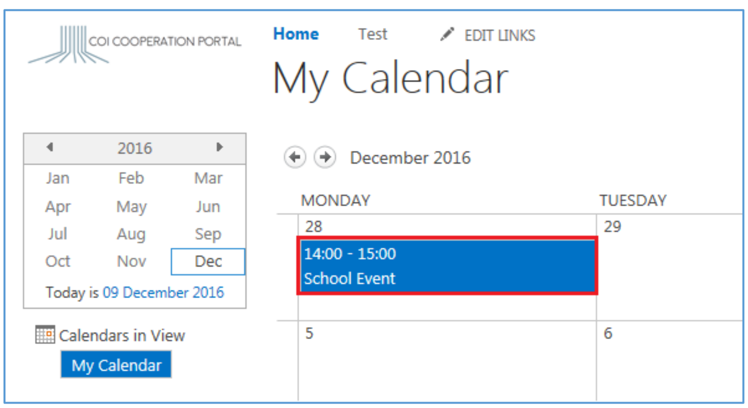
Both ways causes New Item popup to appear, but when we use **Add** link, Start Date and End Date are set to the day we have chosen.



When all values are in place, event can be saved with use of Save button.

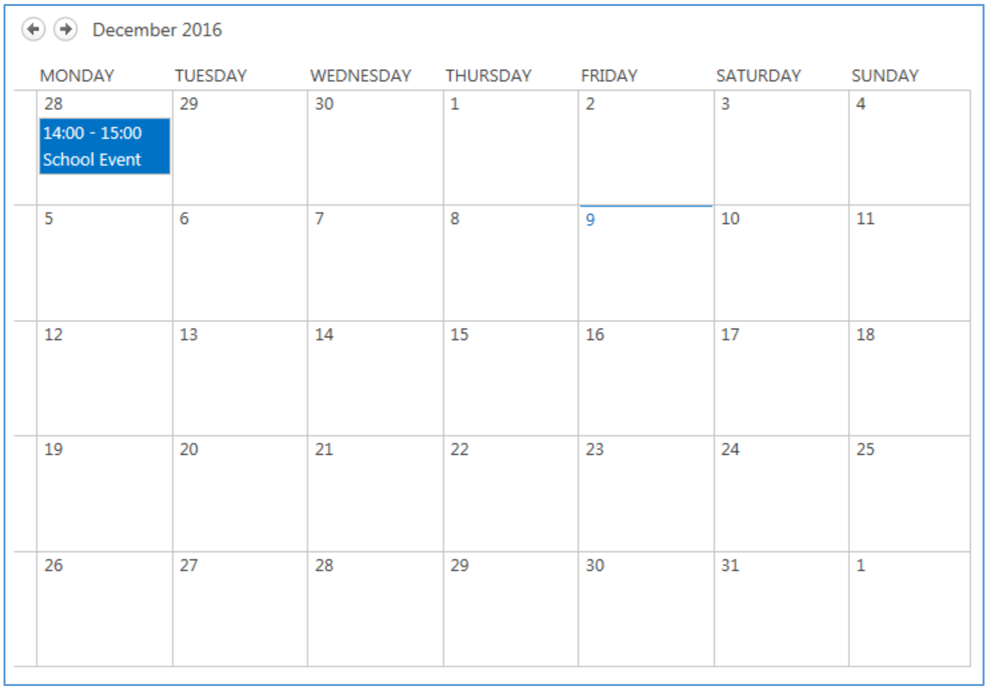


Event gets saved and loaded to the calendar view.

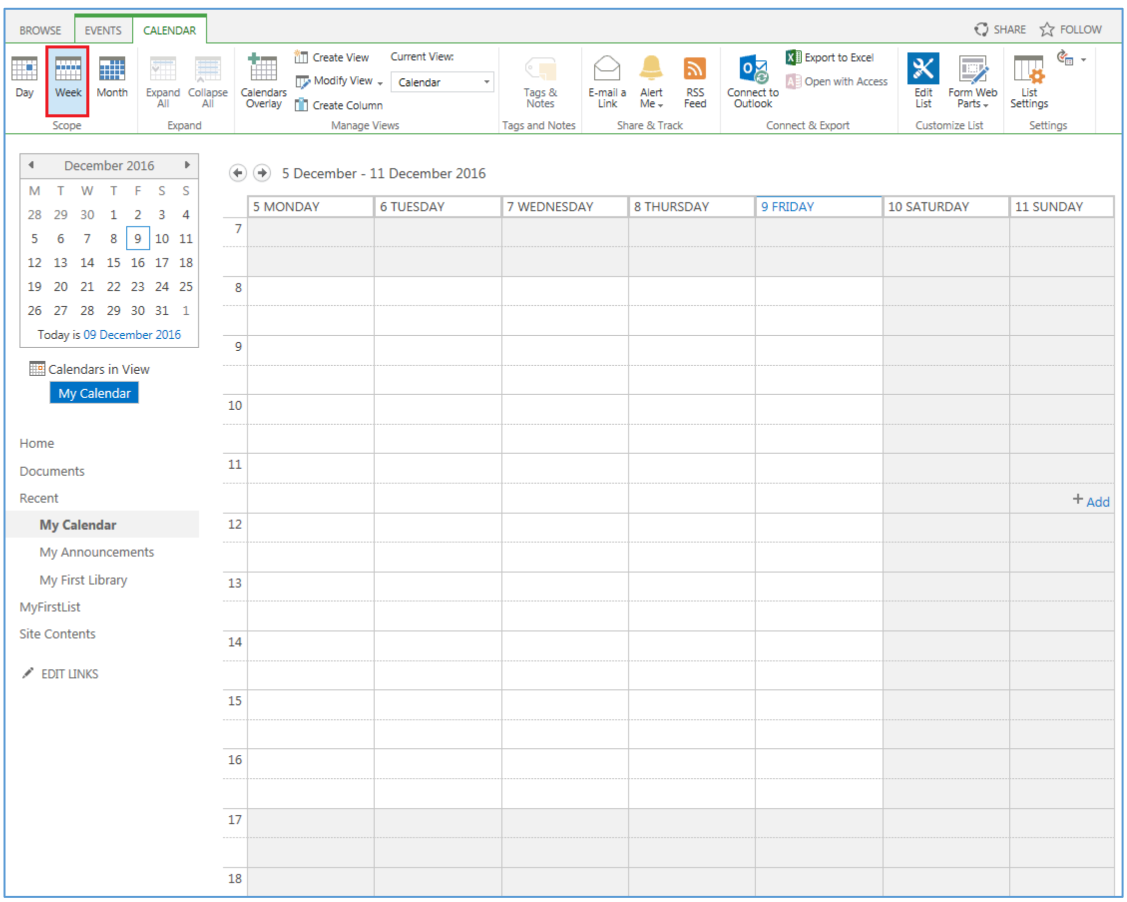


ii. Working with Calendar view

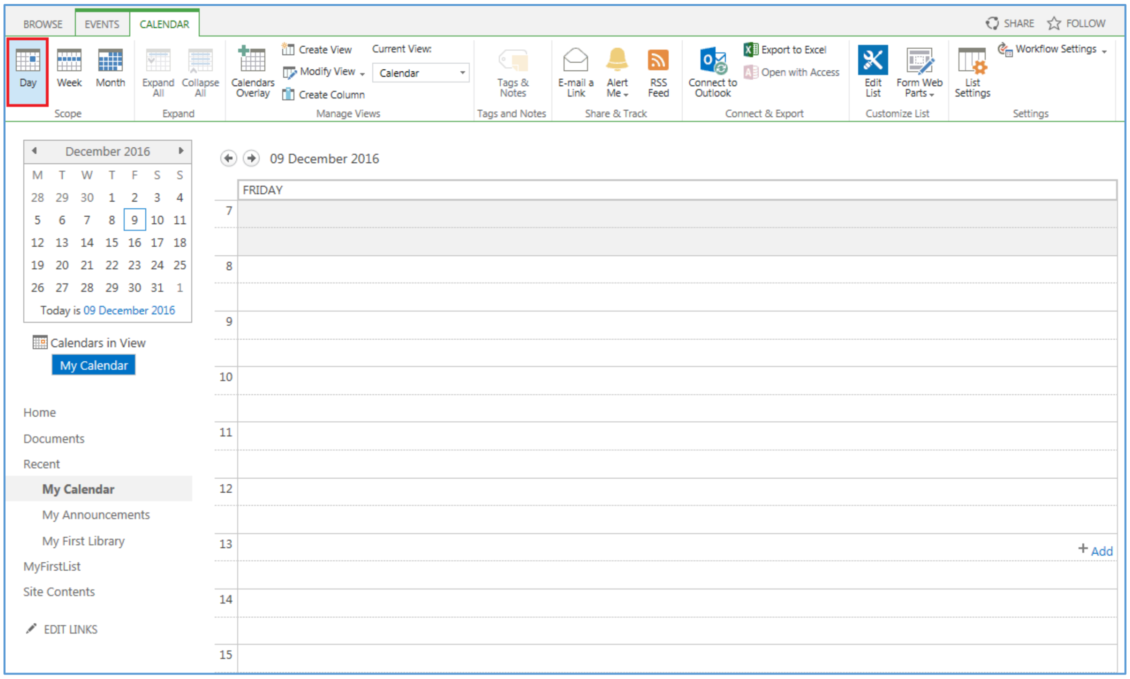
Calendar view is a default view for lists created from Calendar template. By default it shows whole month day by day in rectangular structure.



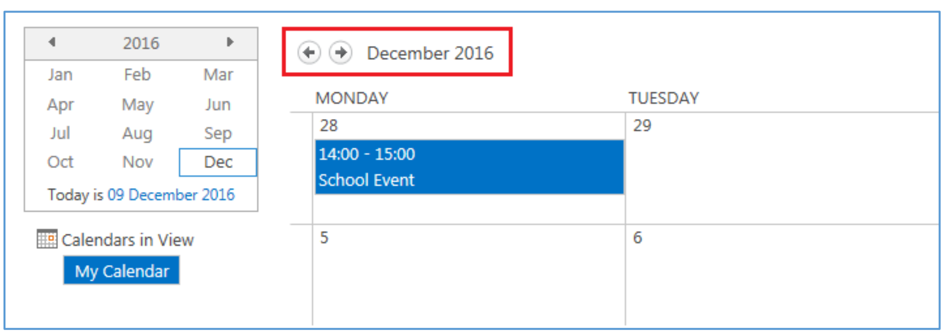
Monthly scope is default, but SharePoint also supports weekly and daily scopes. Weekly scope can be toggled directly from SharePoint ribbon (**Week** button).



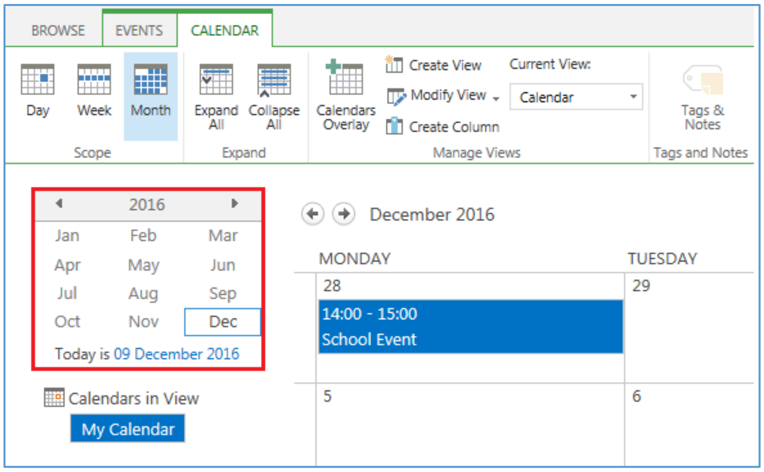
Similarly, daily scope shows only one day, divided to hours, so it’s more precise.



No matter what scope is currently displayed, users can navigate to next or previous day / week or month with use of arrows above calendar grid.



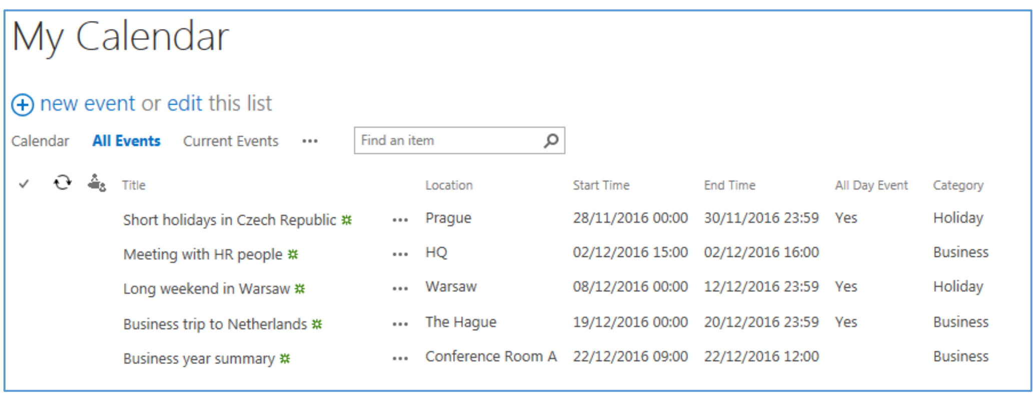
To navigate through years we can use small calendar control (top left corner of the page). This option works only with monthly scope.



iii. Calendar Overlays

Overlays is one of the more advanced calendar options, which helps to categorize different types of events and to displays this categorization in friendly way.

In this example we assume that we have a calendar with 5 events – 3 business events and 2 birthday events (Category is built-in column, present by default in every Calendar list).


My Calendar

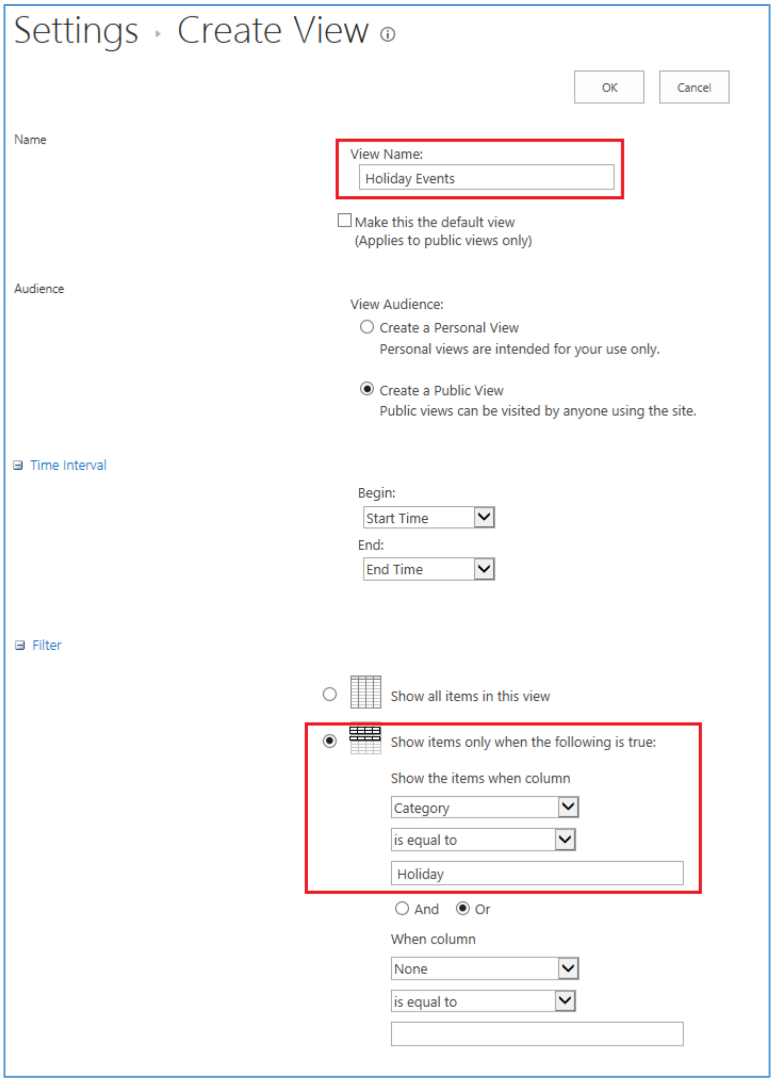
new event or edit this list

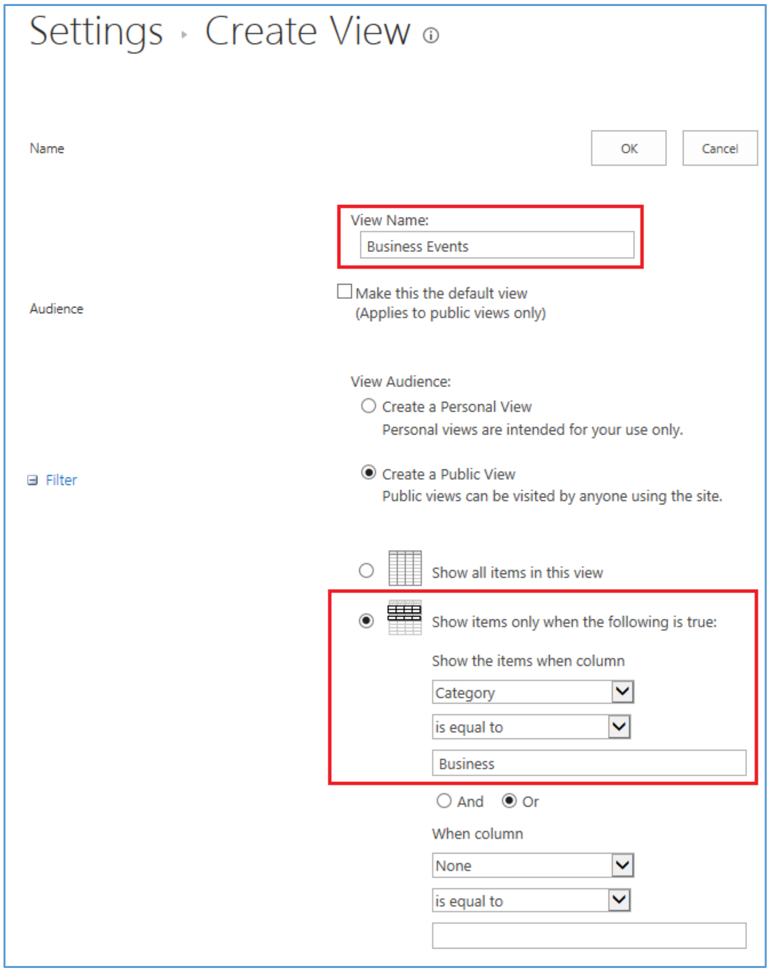
Calendar All Events Current Events ••• Find an item

Title		Location	Start Time	End Time	All Day Event	Category
Short holidays in Czech Republic	•••	Prague	28/11/2016 00:00	30/11/2016 23:59	Yes	Holiday
Meeting with HR people	•••	HQ	02/12/2016 15:00	02/12/2016 16:00		Business
Long weekend in Warsaw	•••	Warsaw	08/12/2016 00:00	12/12/2016 23:59	Yes	Holiday
Business trip to Netherlands	•••	The Hague	19/12/2016 00:00	20/12/2016 23:59	Yes	Business
Business year summary	•••	Conference Room A	22/12/2016 09:00	22/12/2016 12:00		Business

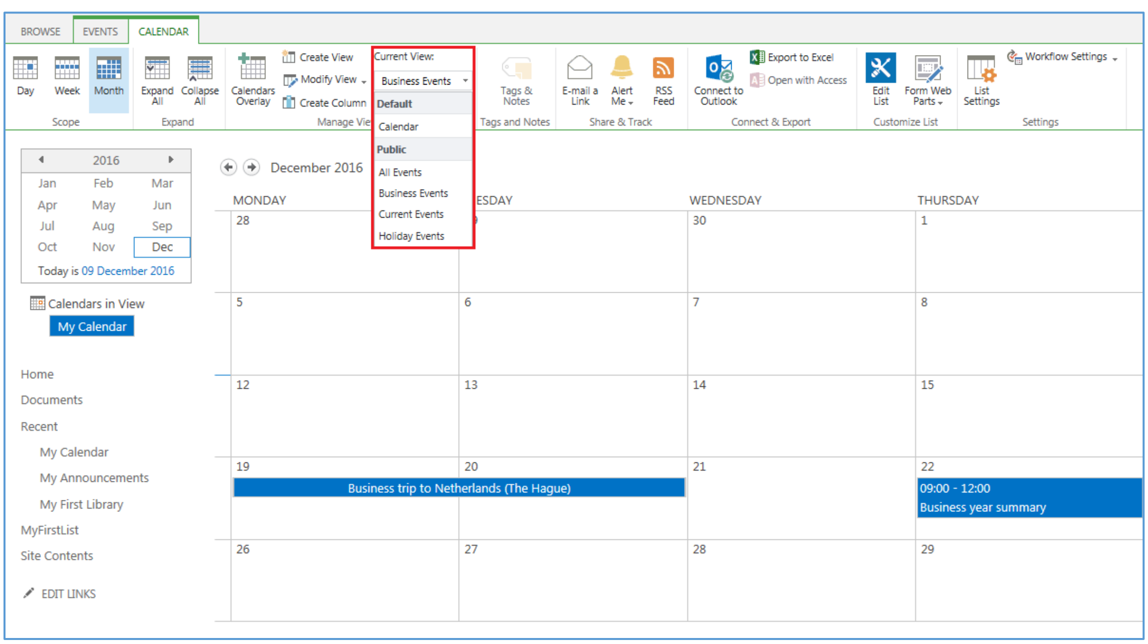
Currently there is no way to easy distinguish these different types of events in our calendar (they are all displayed in the same fashion).

One step ahead is to create two separate views for business meetings and holiday meetings.

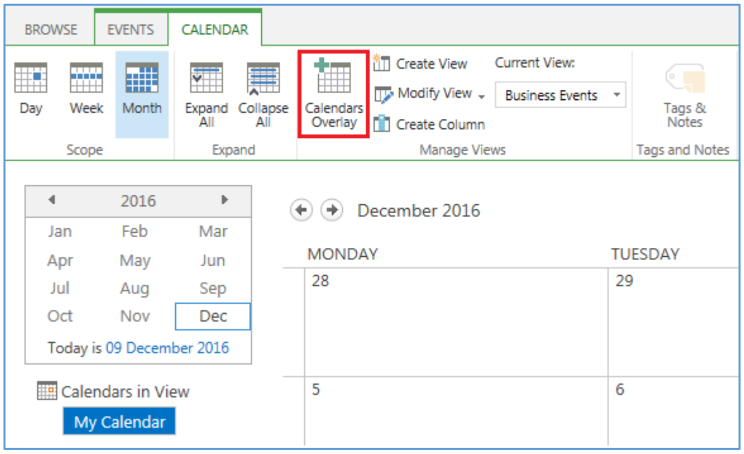

Settings › Create View
OK
Cancel
Name
View Name:
Holiday Events
Make this the default view
(Applies to public views only)
Audience
View Audience:
Create a Personal View
Personal views are intended for your use only.
Create a Public View
Public views can be visited by anyone using the site.
Time Interval
Begin:
Start Time
End:
End Time
Filter
Show all items in this view
Show items only when the following is true:
Show the items when column
Category
is equal to
Holiday
And
Or
When column
None
is equal to



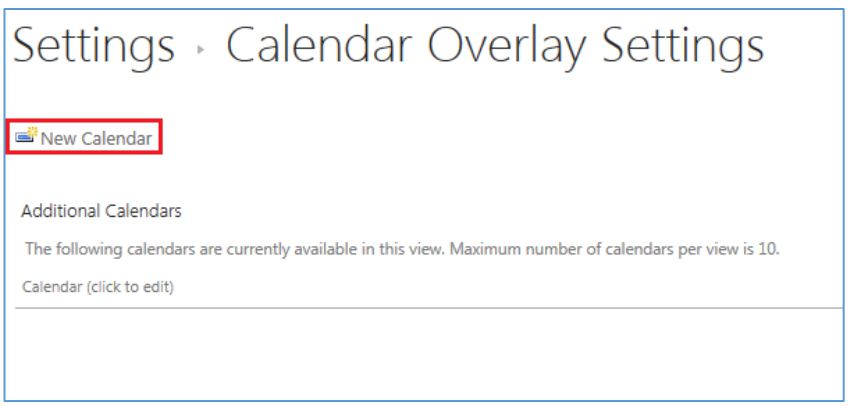
And then we can navigate through them to see only the type of events we need.



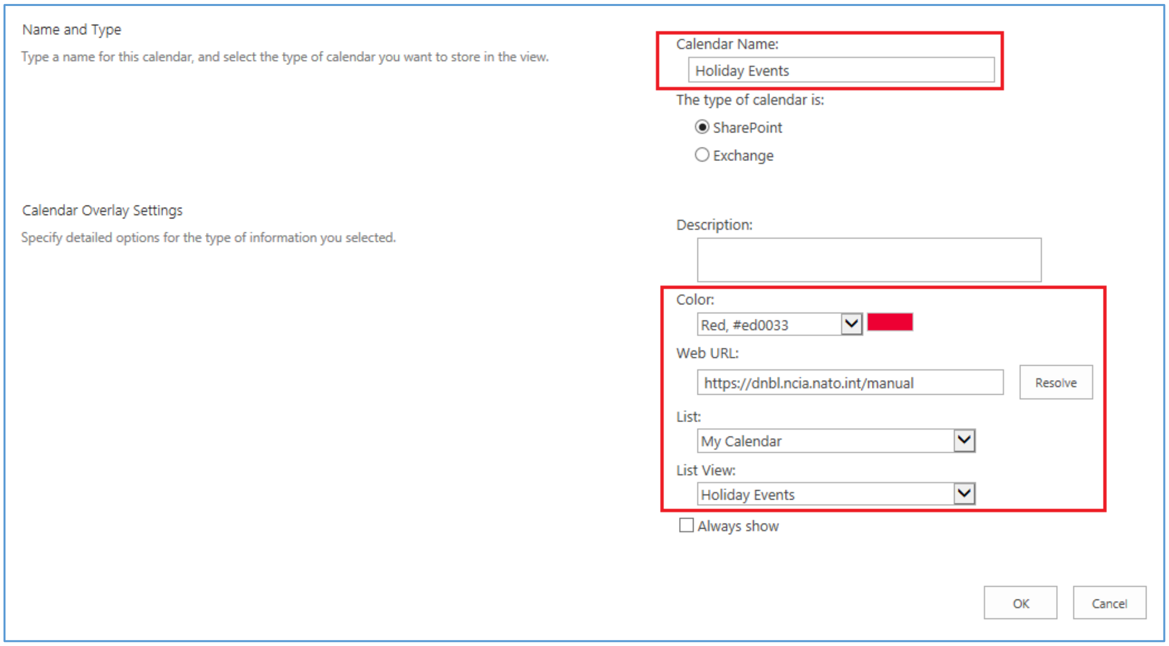
But it's not very comfortable when we want to see all events together. This is where calendar overlays come to help. Overlays can be setup on Calendar Overlays Settings page (Calendar Overlays button on ribbon).



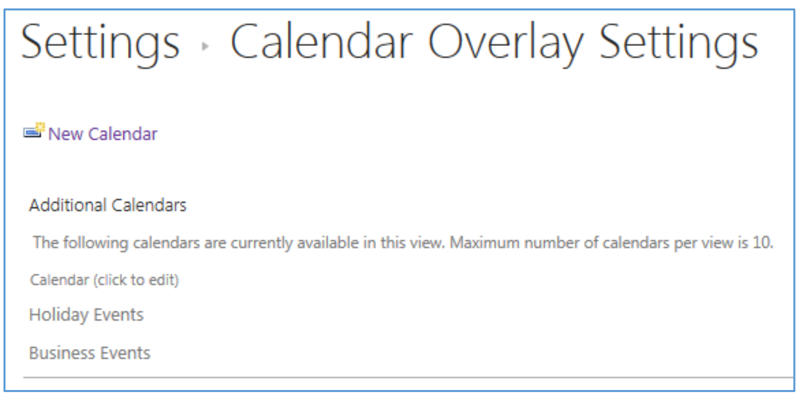
On this page we can define list of calendar views to be displayed together in one collective view. Views can be added by New Calendar button:



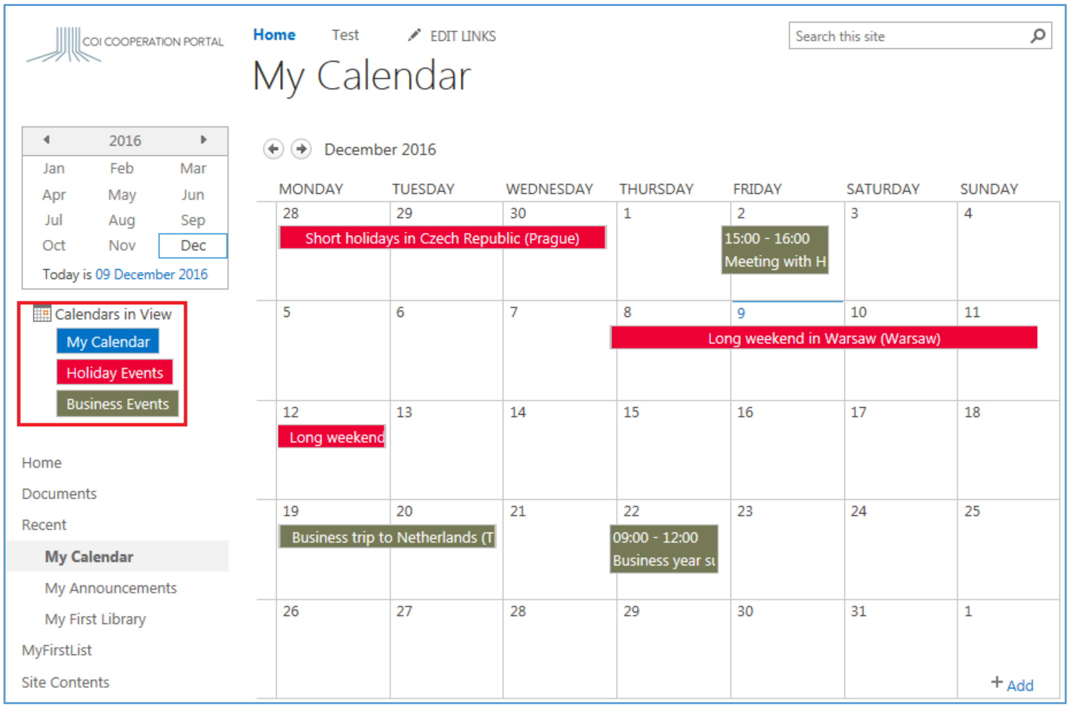
On next page we specify which calendar (and which view from this calendar) we would like to include in overlay view, we can also select color which will represent events from this calendar.



We may add maximum 10 calendar views that we need to overlay (we can also overlay views from different calendars), for each of them we can choose different color. In our example we overlay two calendar views.



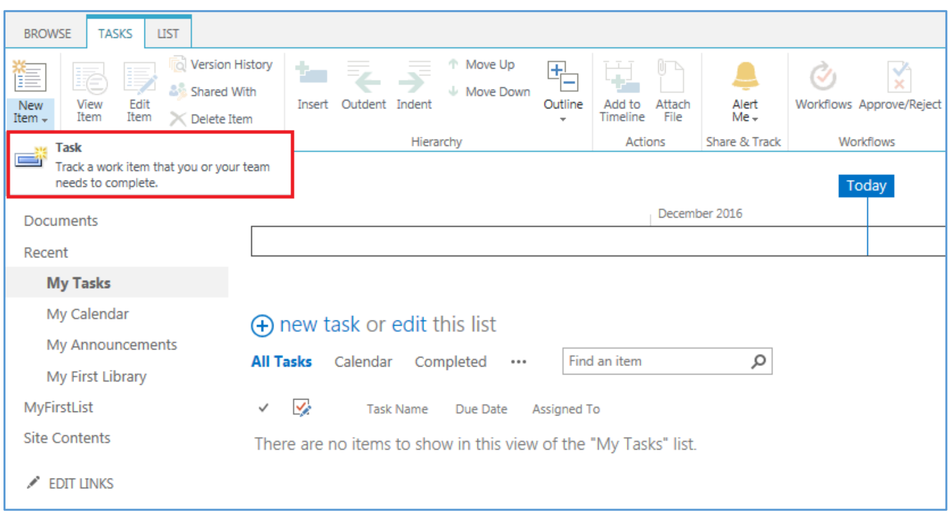
This gives the following result.



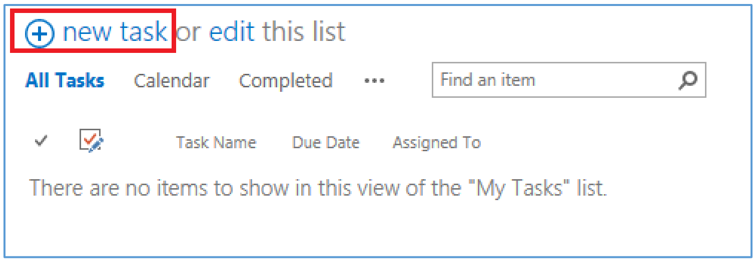
c. Tasks

i. Adding new tasks

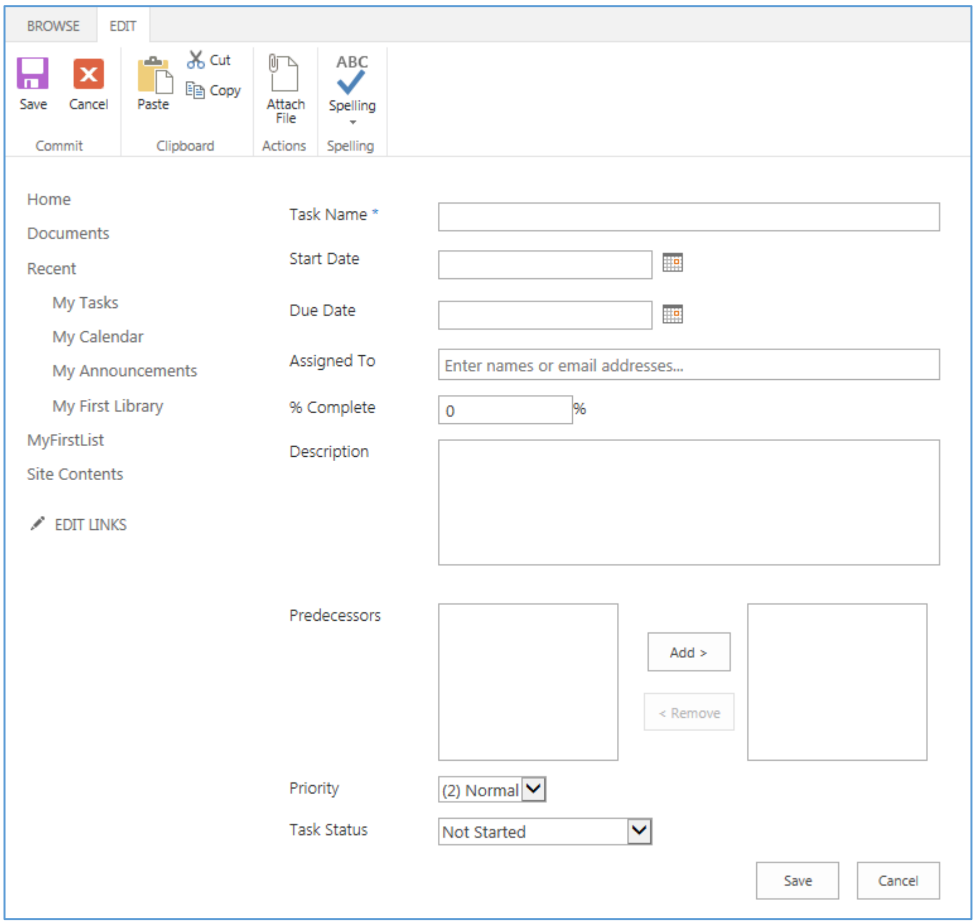
New tasks can be created with use of **New Item** button from SharePoint ribbon.



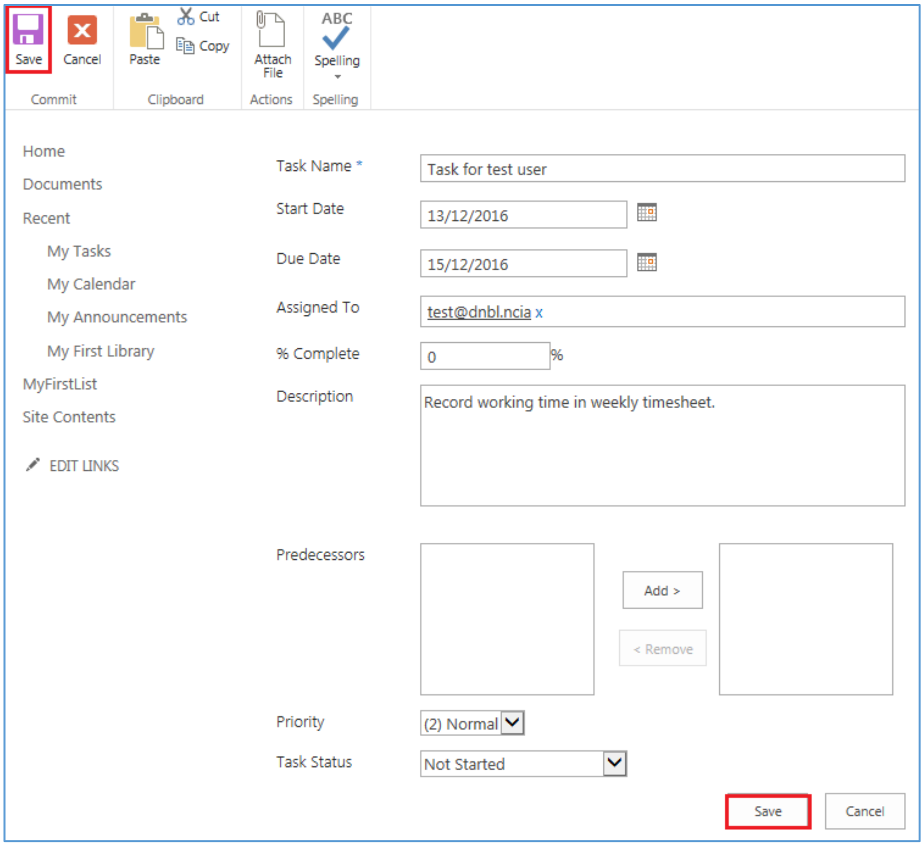
And also with **new task** link above the list.



Task edit form appears where task information can be provided.

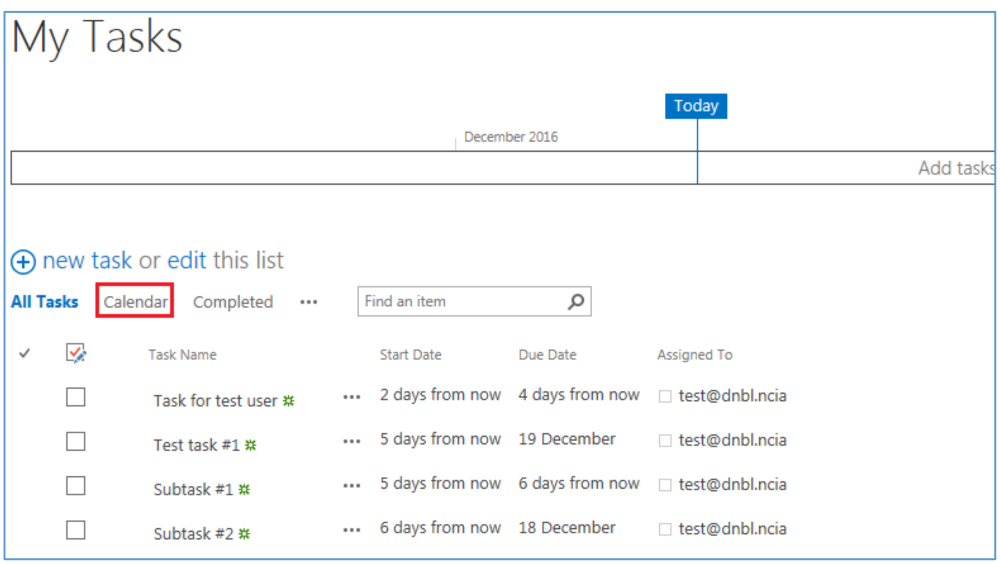


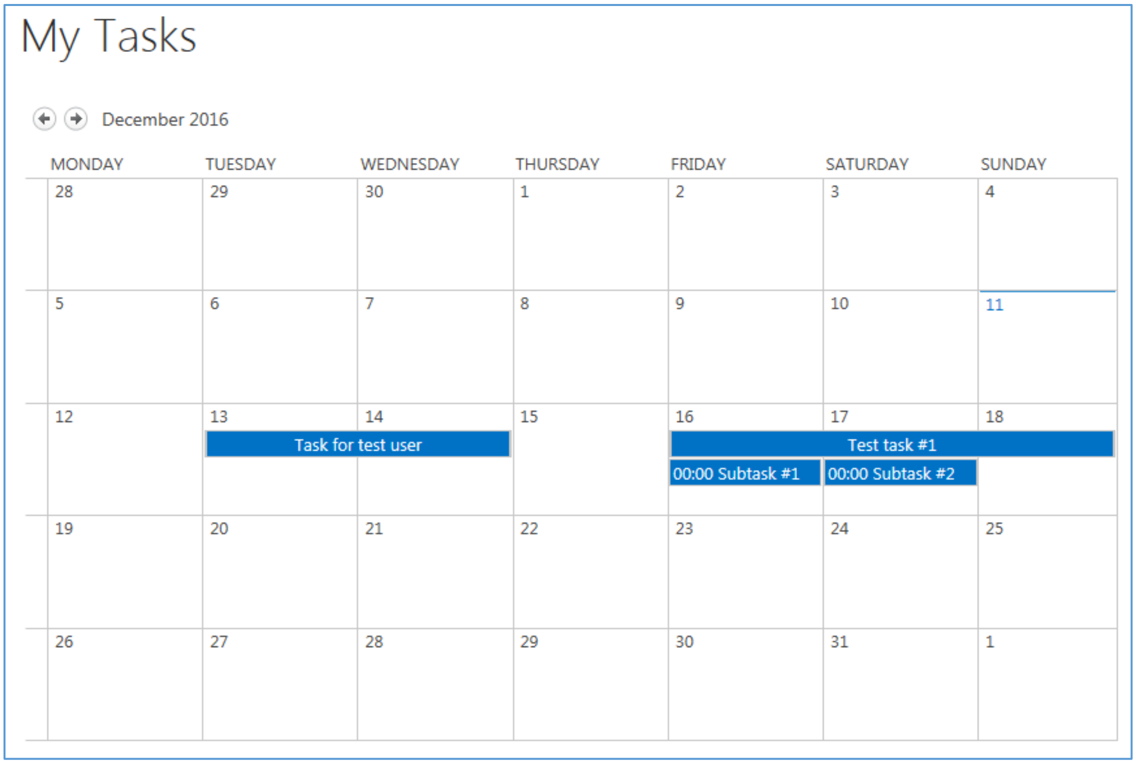
Only **Task Name** is required field for task list. Usually it makes sense to fill in **Assigned To** field to specify who is responsible for fulfilling this task. Start Date, Due Date are also very useful. When ready click on **Save** button.



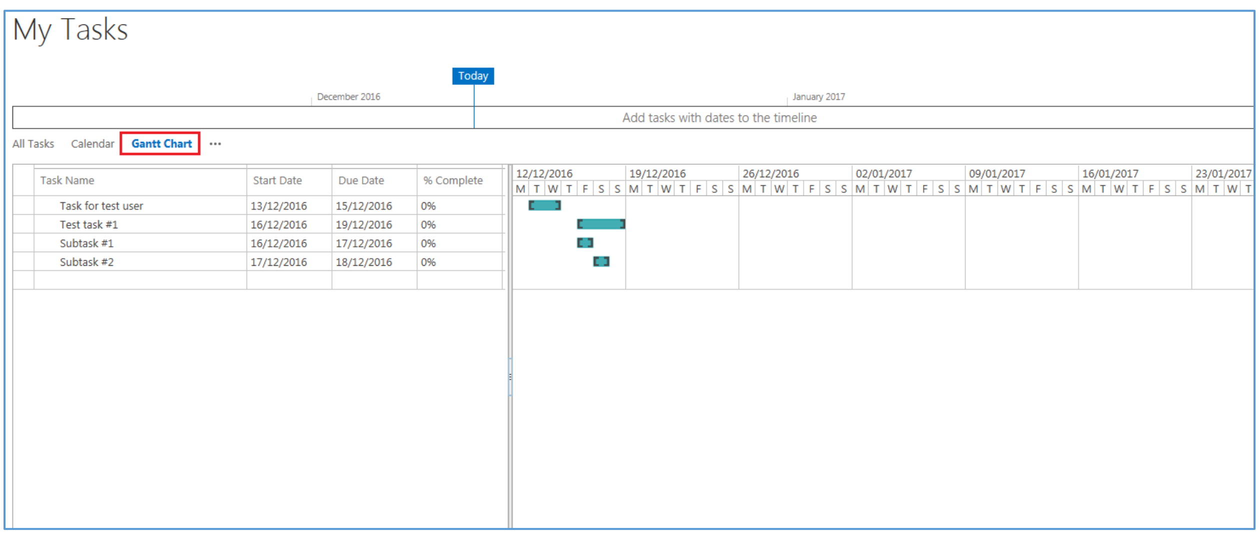
ii. Task list views

Along with special metadata (relevant to tasks) task list template provides users (by default) with list of useful views that help to work with tasks more efficiently. First example is a Calendar view, which presents tasks in a calendar that we know from SharePoint calendars.

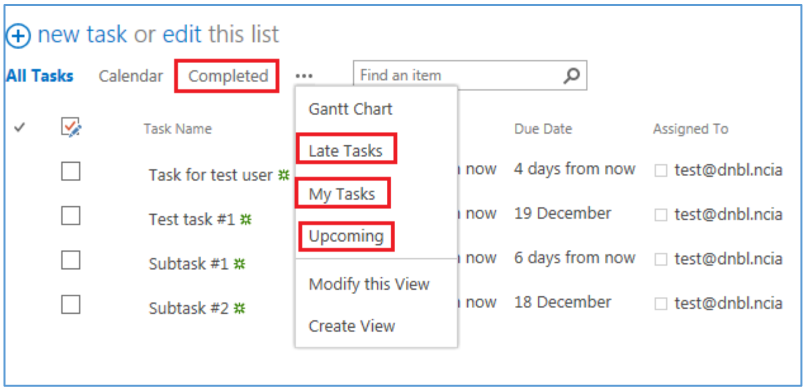




Another interesting view is Gantt Chart. Gantt view is a representation of project plan, well known especially by project managers.



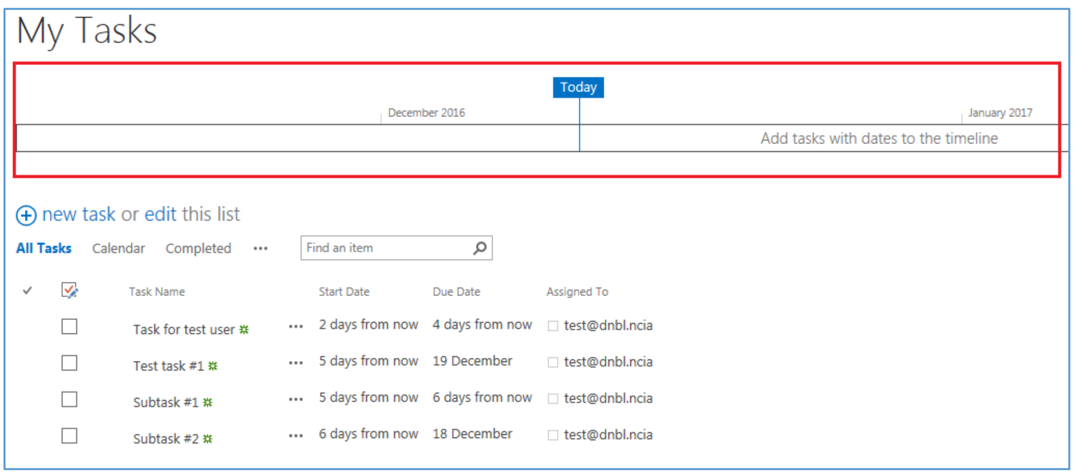
There are more very useful views, showing completed, late or upcoming tasks. Also My Tasks view, showing only tasks for current user.



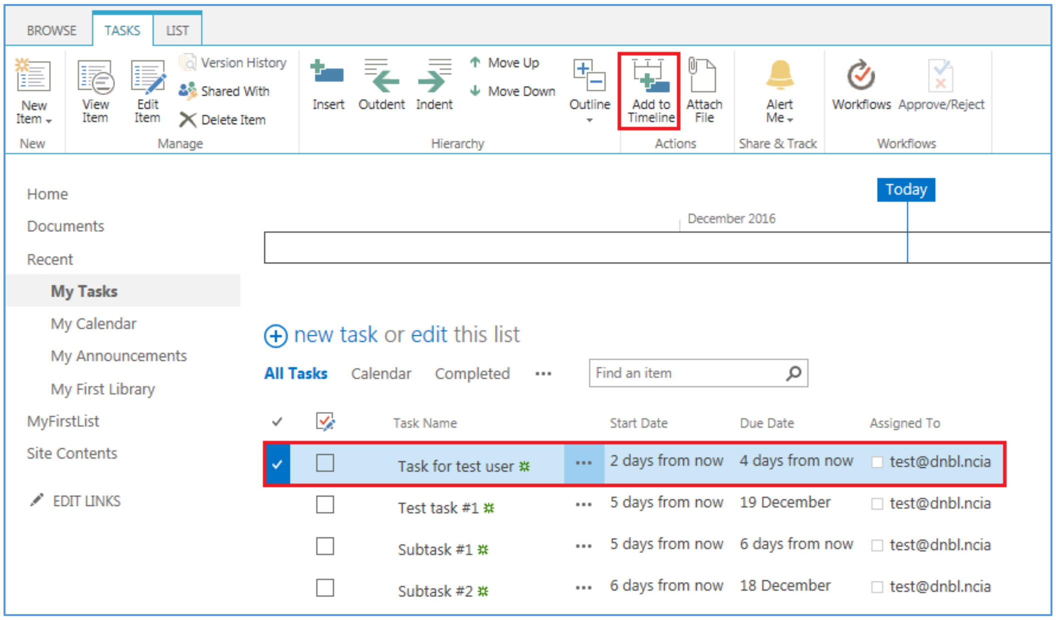
iii. Working with timeline

Timeline is very clever and handy representation of tasks from the list, similar to Gantt chart, but more powerful. We can choose which tasks should be put on the timeline, we can also make indents to create hierarchical views.

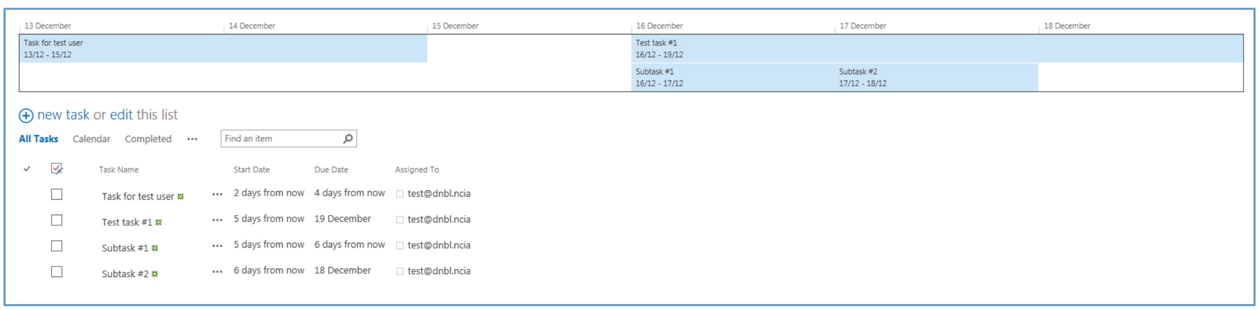
Timeline is located above the list of the tasks



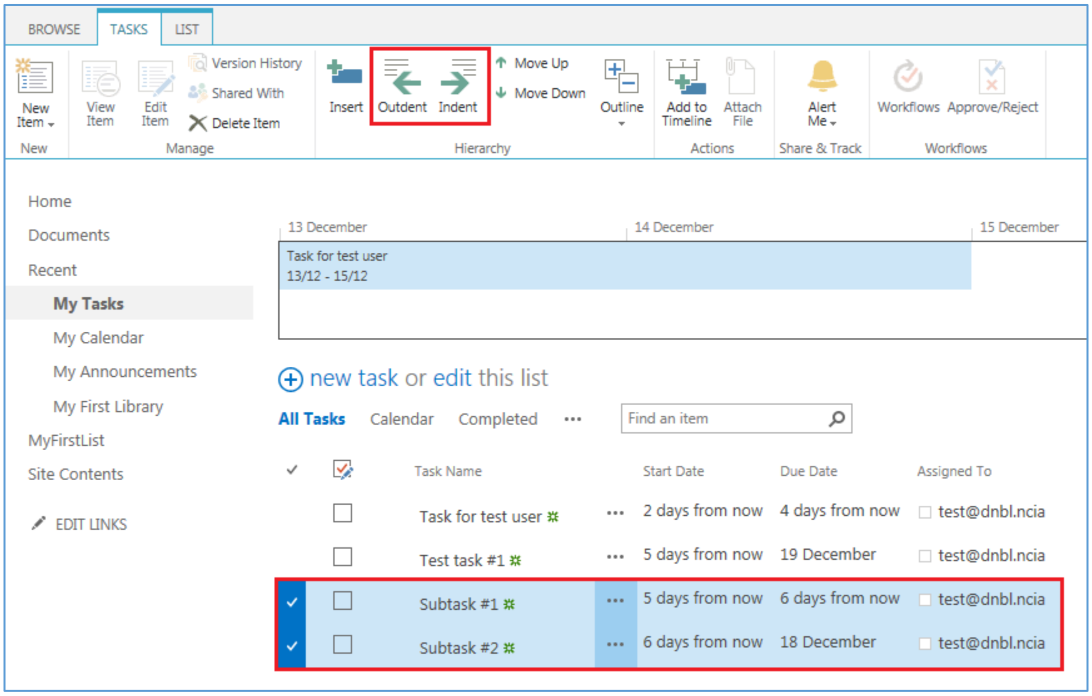
To add tasks to the timeline we can use Add to Timeline command from SharePoint ribbon (task should be selected first!). Only tasks with Start Date and Due Date can be added to the ribbon!



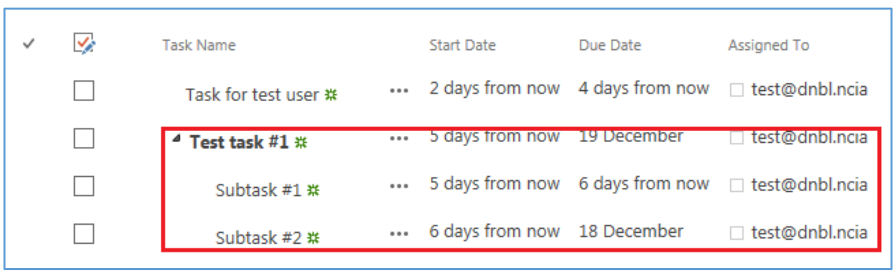
Timeline will be updated with new task. With more tasks added, timeline adjusts its range based on start and end dates.



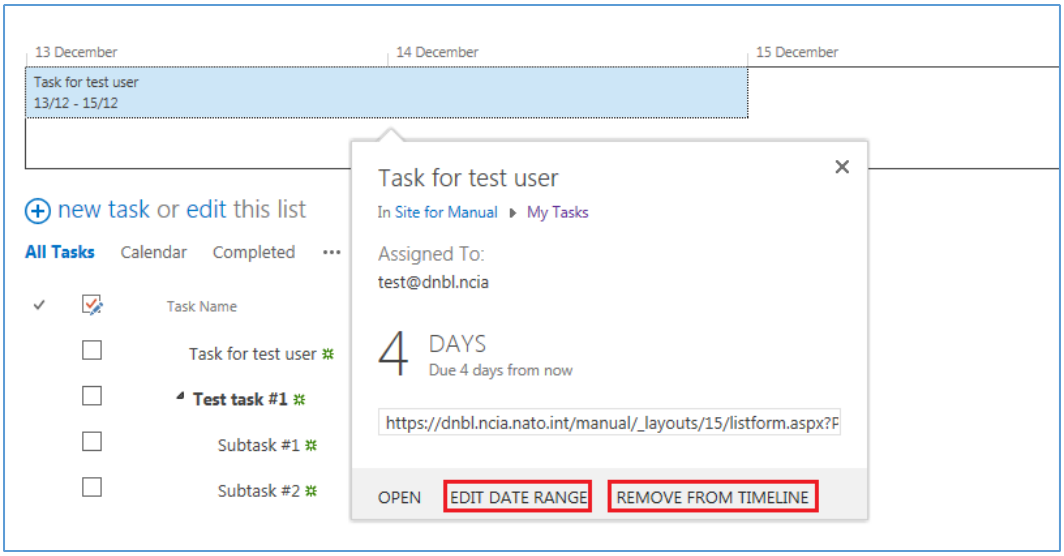
Task hierarchy can be managed with use of indent / outdent commands (works also on multiple selections).



Task hierarchy is represented by a tree view.



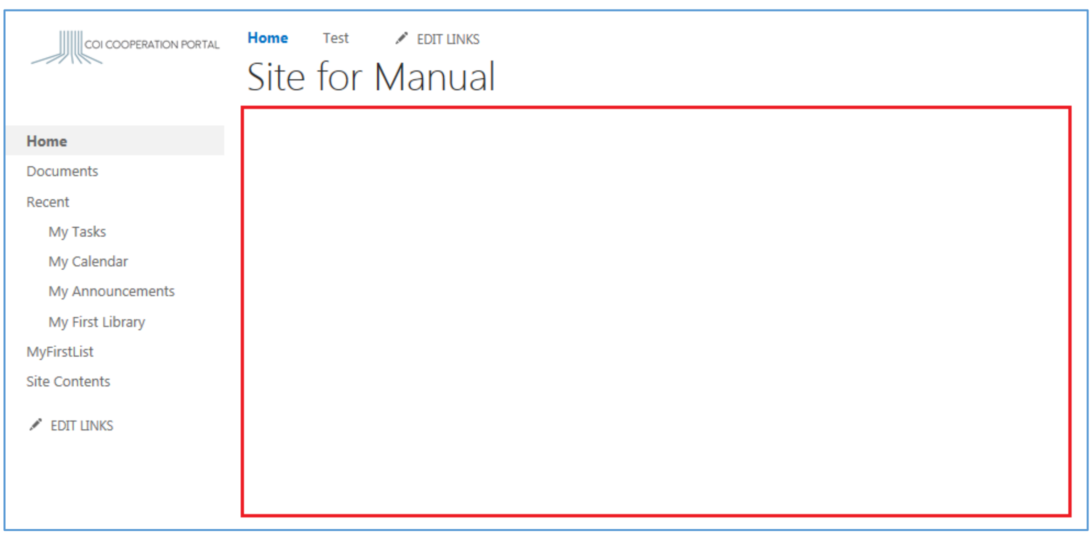
When user clicks on task (directly on timeline) popup appears on the screen with some additional timeline options for task (like quick edit or removing from timeline).



5. Working with pages

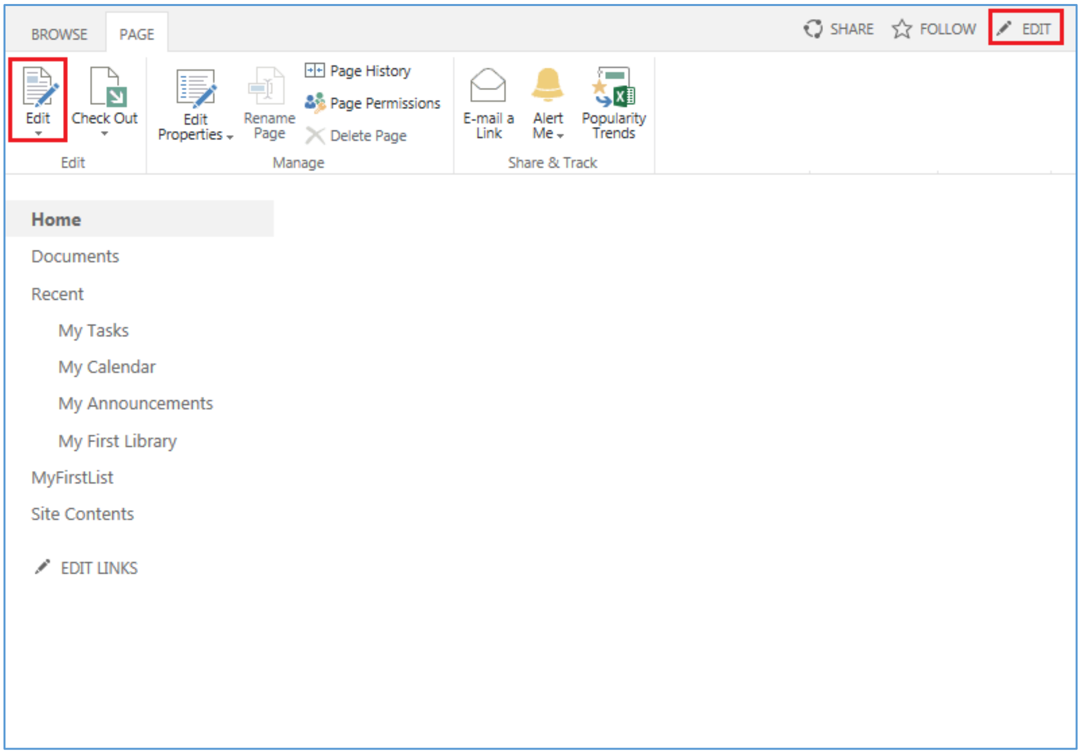
a. Introduction

SharePoint page is an area where content (lists, libraries, text, images, links etc.) is presented to the user. It is located in central area of the screen (below page title and next to quick launch)

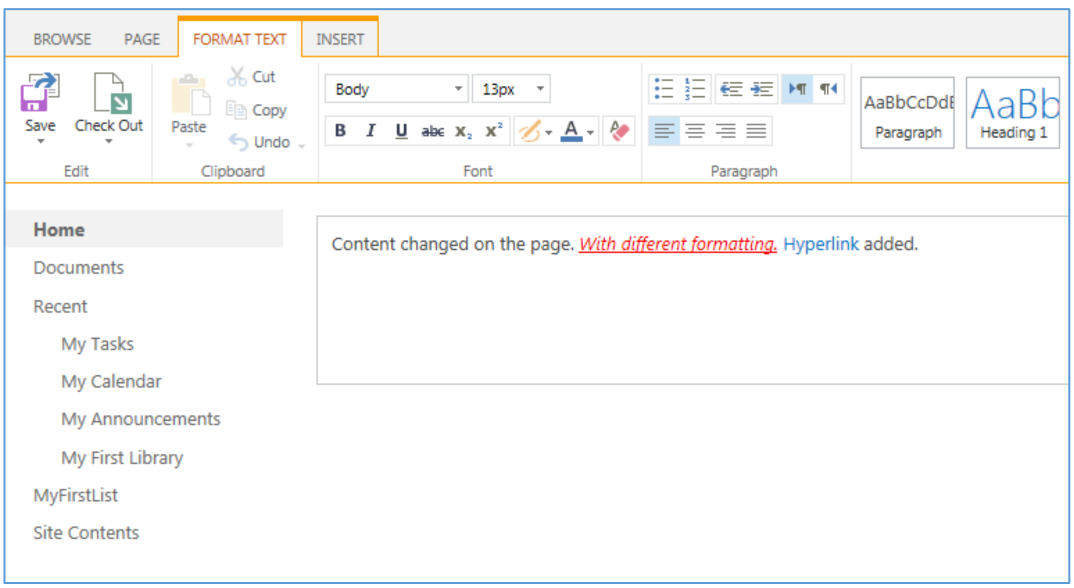


b. Editing existing page

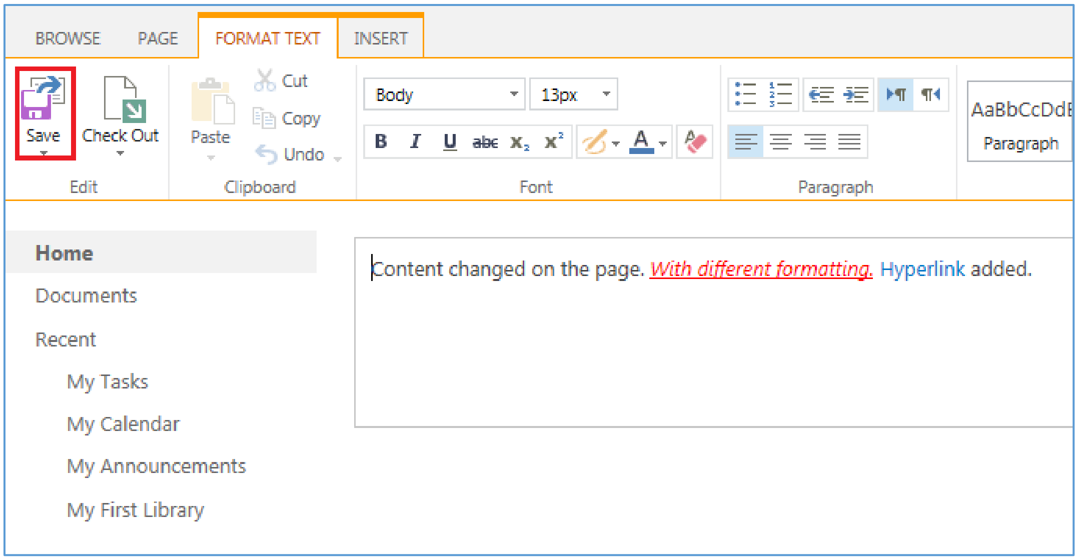
In order to edit page, it should be switched from read-only mode to edit mode first. To do that, use Edit command from SharePoint ribbon or Edit shortcut (top right corner of the page).



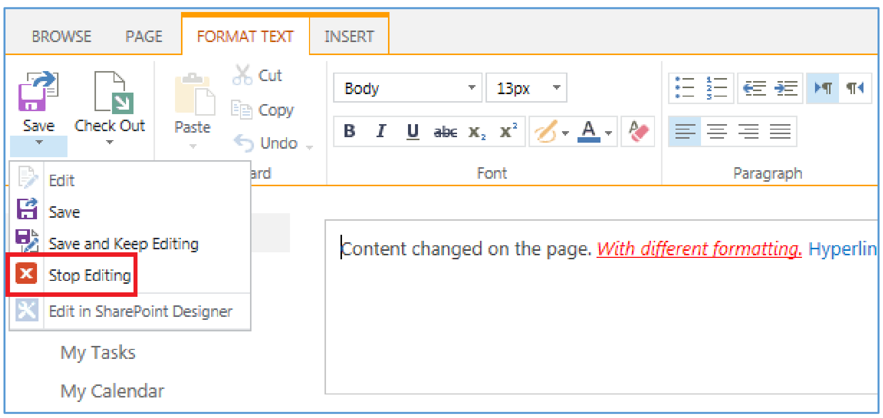
When in edit mode, content should be changed according to requirements.



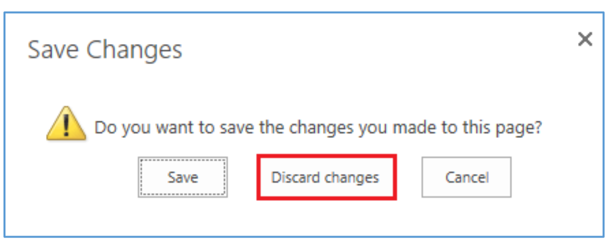
To save the changes, use Save button on the ribbon.



If we don’t want to save changes, we can discard them with use of Stop Editing command.

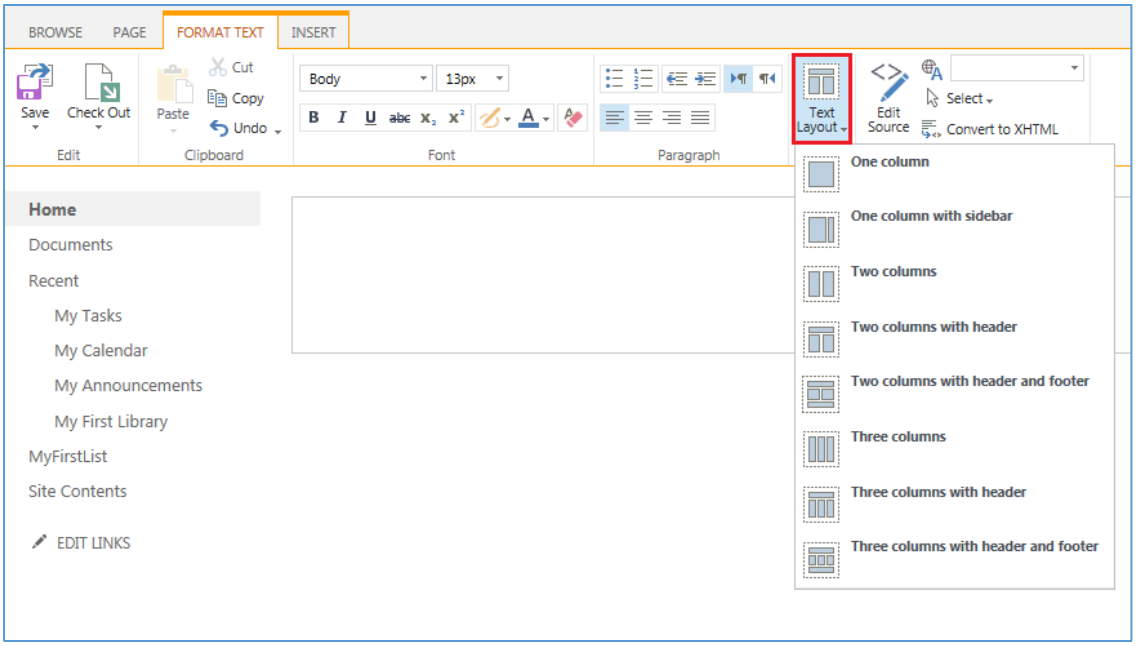


On the popup we can select action to Discard changes and give up on all changes made since last save.

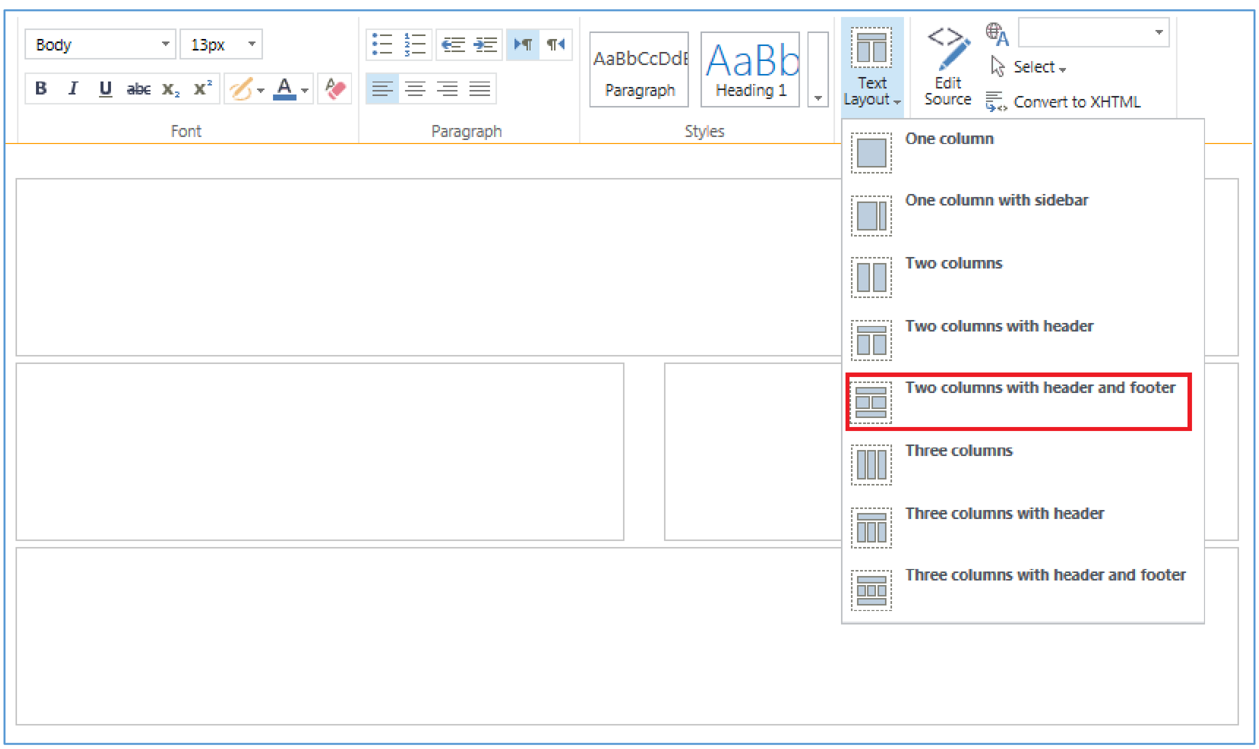


c. Page layout setup

Page layouts allow to organize content on the page in different formats (columns and rows division). There are a few predefined page layouts available in SharePoint. Page layout can be changed in edit mode with use of Text Layout command.



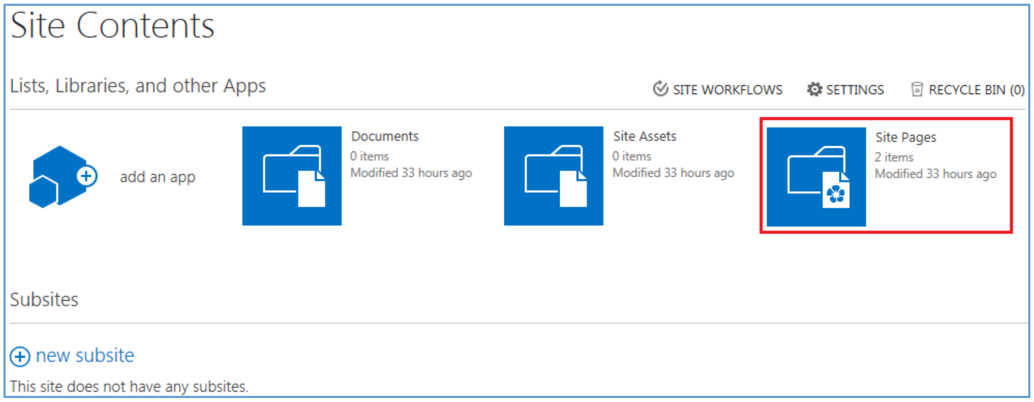
When new page layout is selected from the list, page gets automatically updated with new columns and rows.



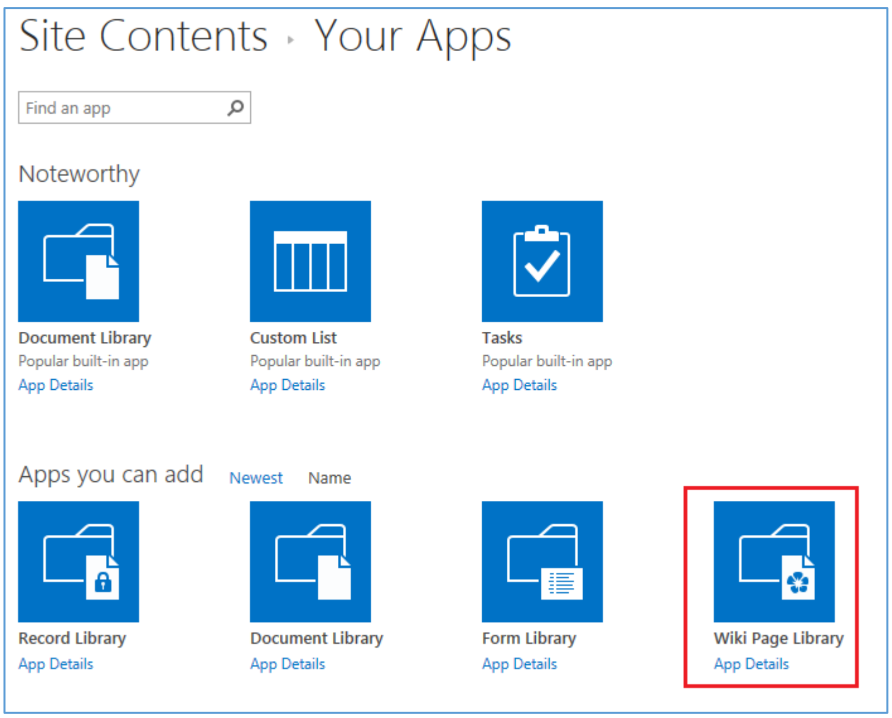
New layout should be saved in order to be visible to other editors.

d. Creating new page

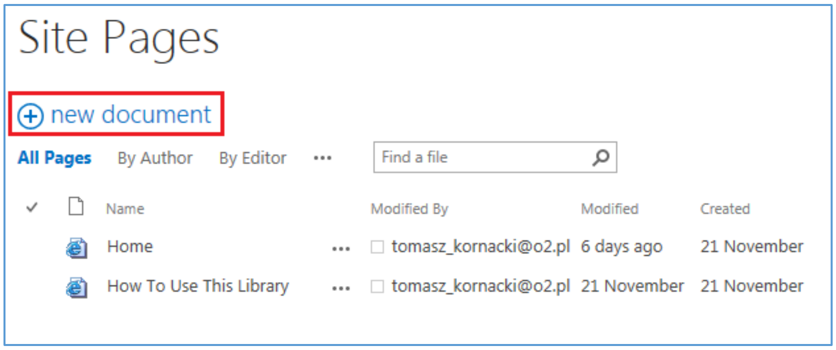
Pages in SharePoint are usually kept in special libraries called Page Library. When SharePoint site is created, usually library called **Site Pages** is provisioned to keep home page of the site.



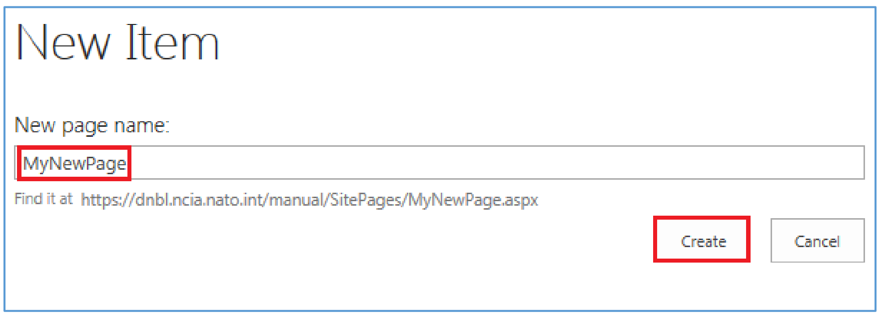
There is also special template for creating page libraries called **Wiki Page Library**. It can be found on **Add an app** page.



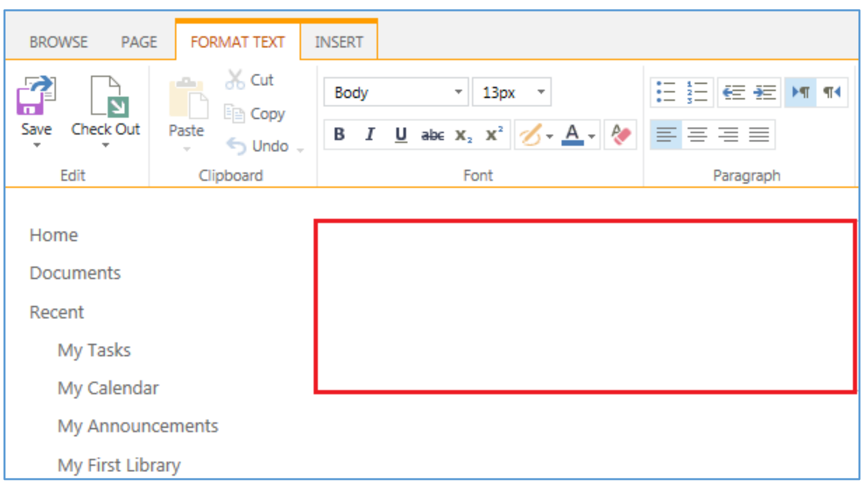
While being in Page library, click on **New Document** button to create an empty page.



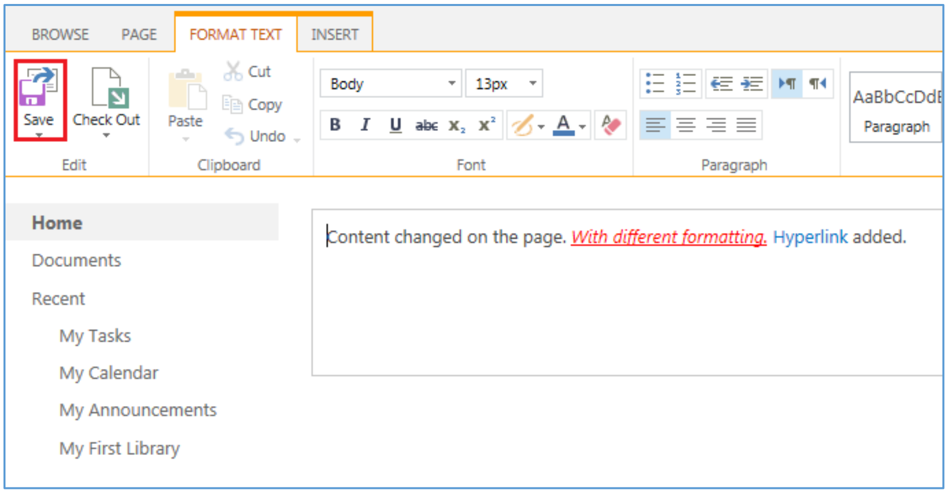
Provide a name for new page and click on **Create** button.



Page will be added to the library and it will be automatically opened in edit mode.

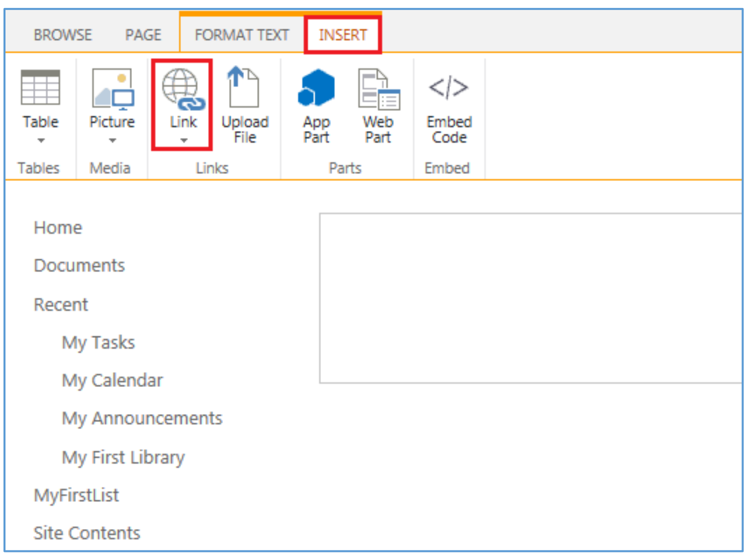


User can make some changes now and save the page afterwards.

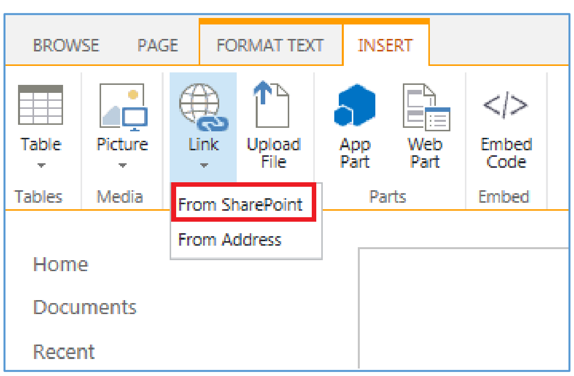


e. Adding links to page

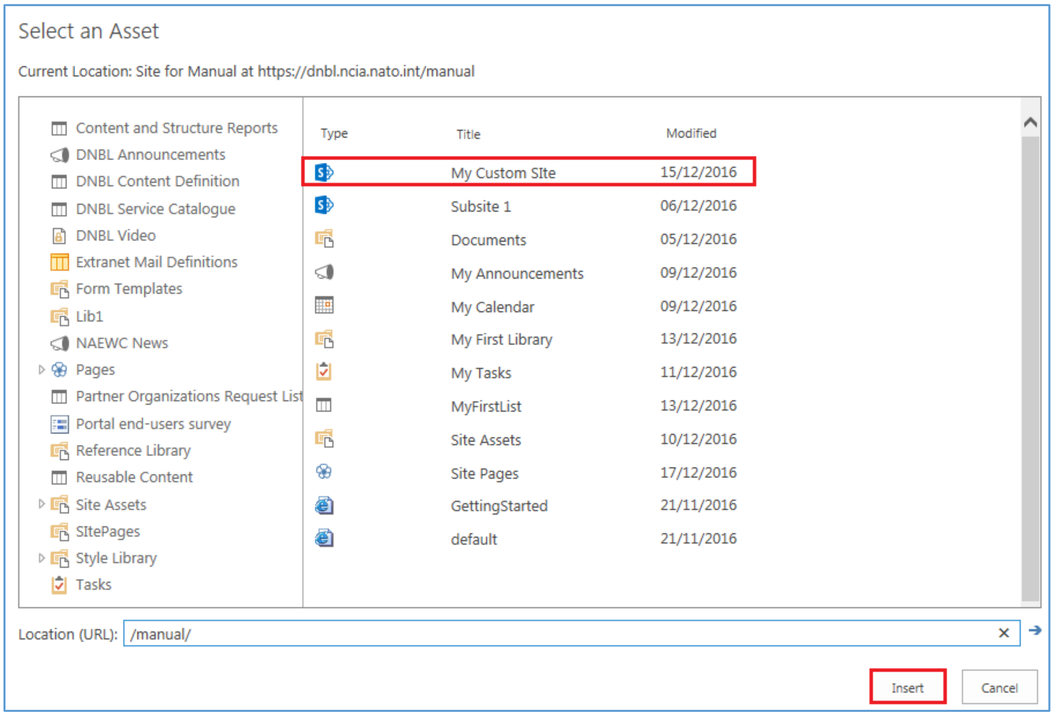
In order to add link to the page, switch it to edit mode, select text and click on **Link** button (INSERT tab on SharePoint ribbon).



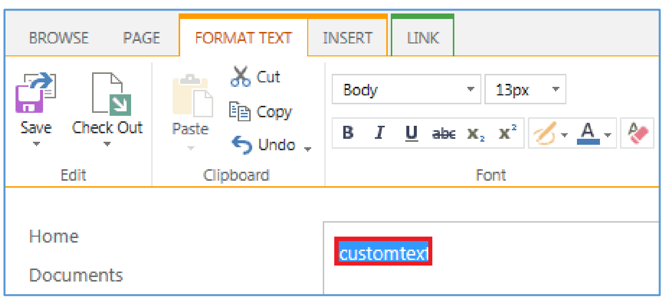
There are two type of links that can be added. First of them are links from SharePoint.



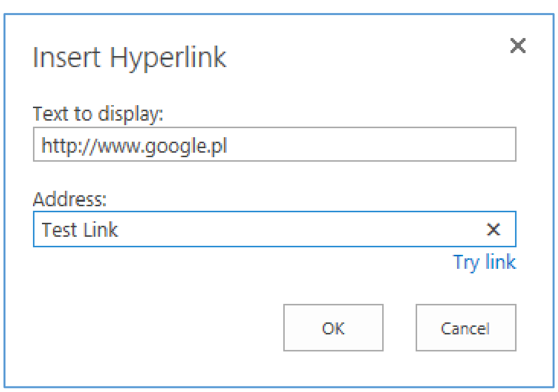
For user convenience popup window will be shown that makes it possible to navigate through SharePoint sites and pages hierarchy



Alternatively, text for a link can be changed by double clicking on it.

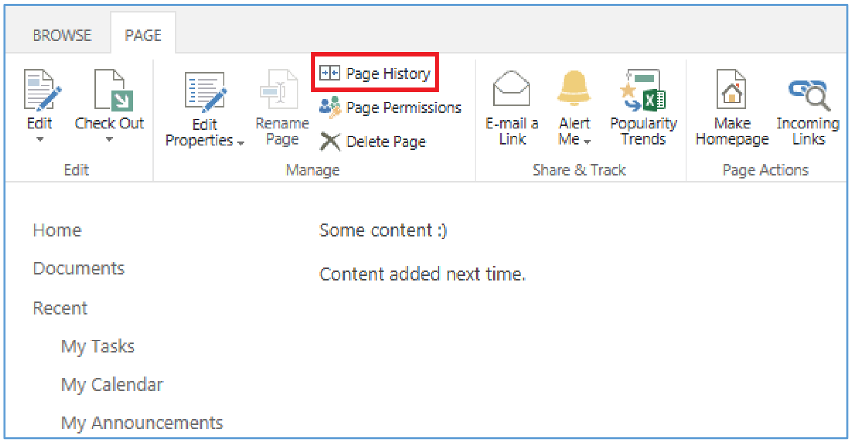


The other type of links that can be added to the page is an external link. This is straightforward, because it requires to put only URL and text.

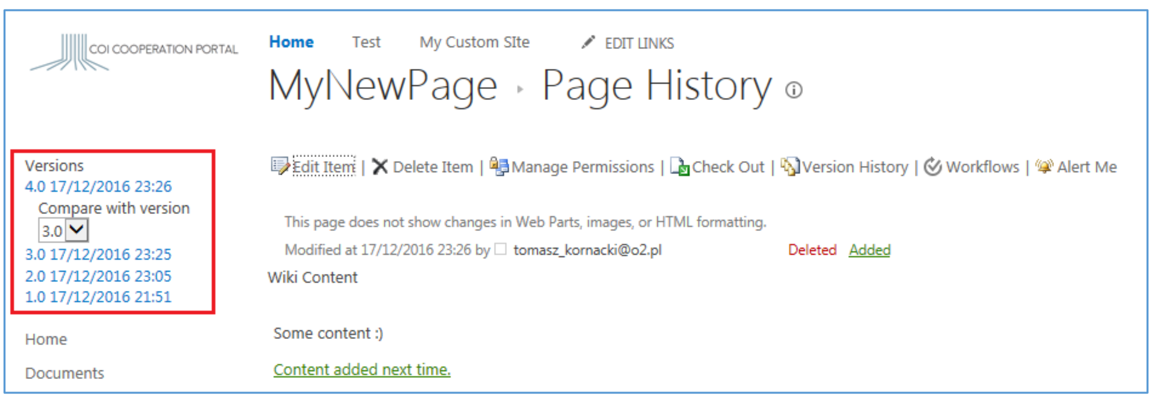


f. Page history

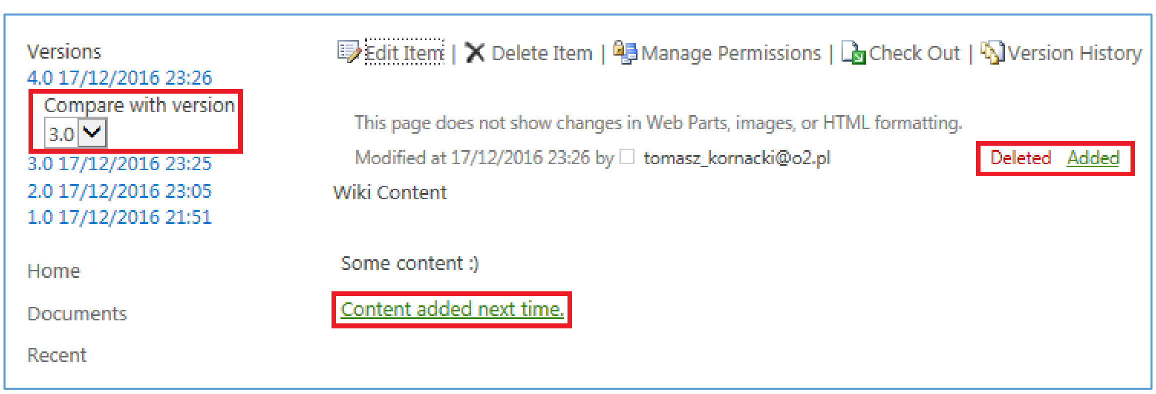
Page history is a special version history view for SharePoint page. User can track changes made to the page in easy way and run some more useful commands. Page history view is triggered with use of **Page History** command from SharePoint ribbon.



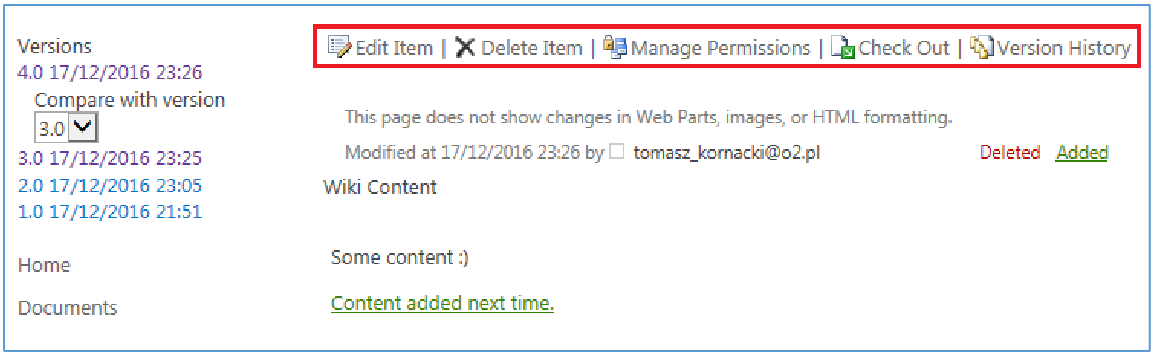
Left area contains easy to navigate list of page versions created for the page from the very beginning of its existence.



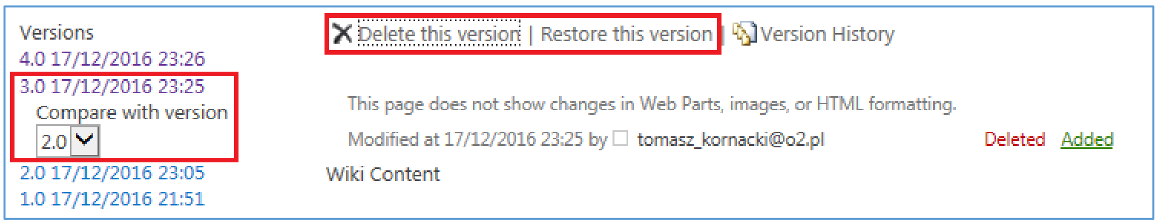
User is provided with option to compare different versions between each other and to see what was added and deleted.



Button toolbar on top of the page contains list of links to useful functions like editing page, deleting page or managing page permissions.



When browsing any of the previous versions, options to delete and restore versions appear on top toolbar.

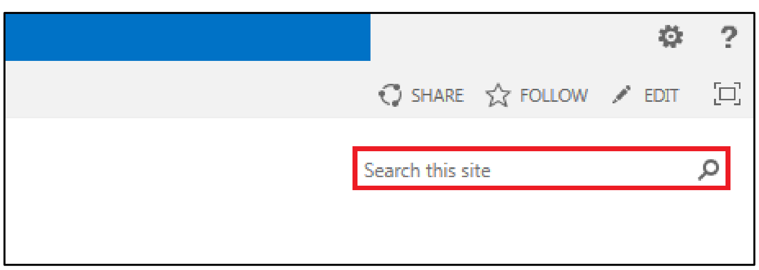


6. Using Search

a. Introduction

Search is one of the most important features in SharePoint. Users need to quickly find people and content to get answers to their questions and to get their everyday tasks completed.

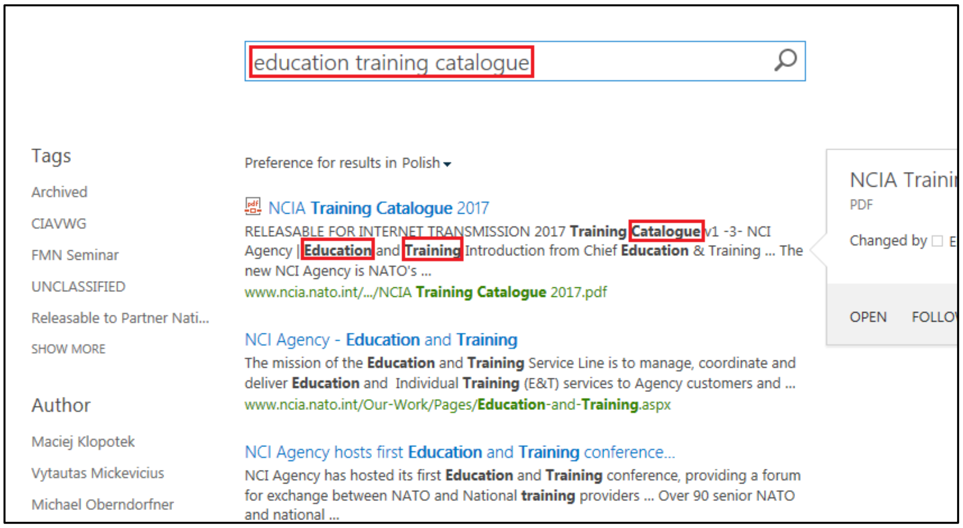
We can define searching as a process of entering one or more search words in search box to form a search query that is executed against the index built on the SharePoint server farm. This search box by default is placed in top right area of the page.



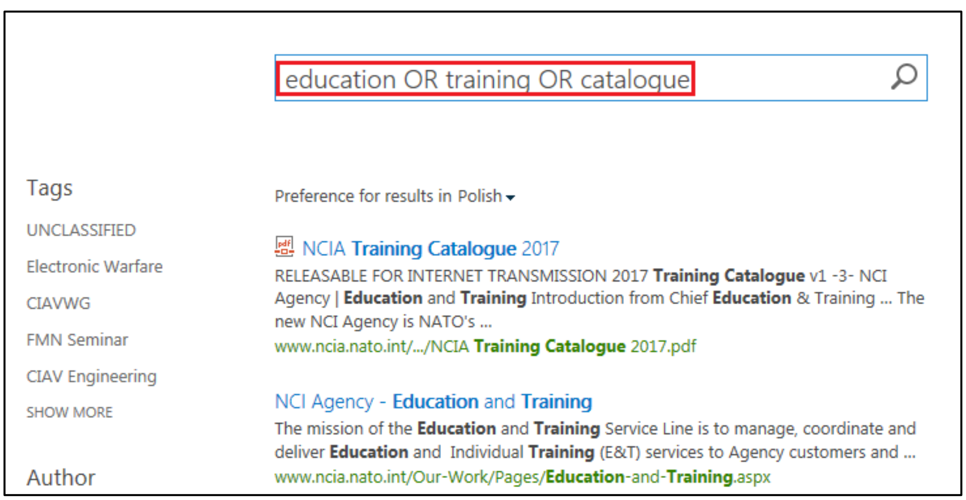
b. Search queries

Search query is an expression containing one or more words representing content that user wants to find. When search query is executed, SharePoint returns set of content items called **result set**. It is important to realize that search query is not executed against actual SharePoint database. It is executed against index database that contains some limited information about data contained in content database, optimized for searching. Index database is not always actual, it is refreshed periodically (every 20 minutes by default, of course it can be configured to any value). This is why the content freshly added to SharePoint list, library or page is not always available through search engine instantly.

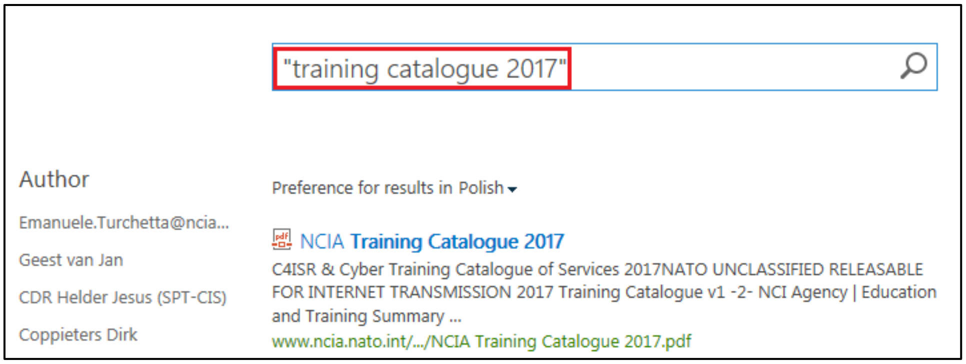
There are some rules about SharePoint search engine that help users to get the result they want. User can enter multiple words to search box and by default search engine will always use AND query. It means that every word from search box has to be present in result in order to appear in search results. For example:



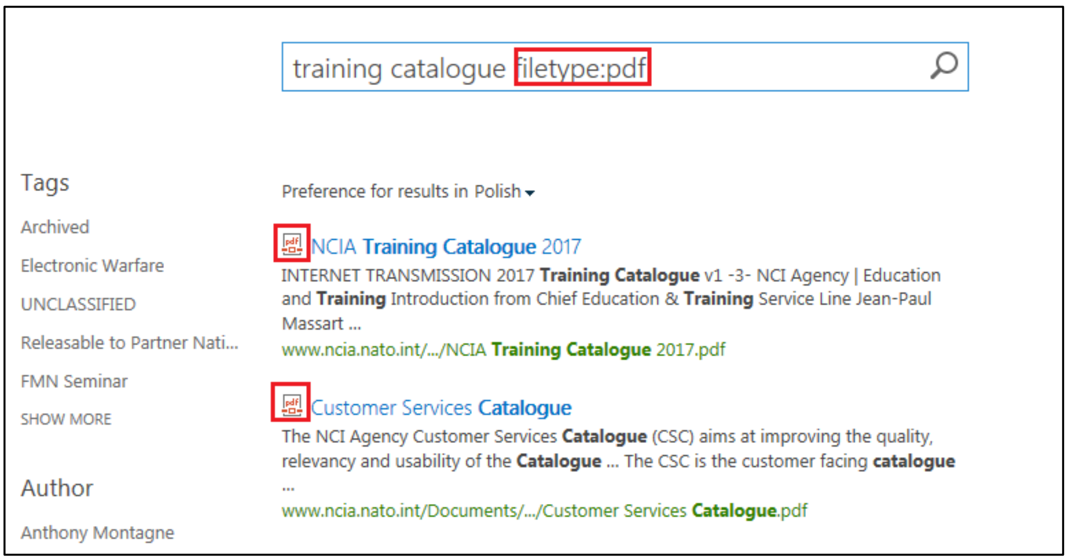
This behavior can be changed by using OR operator explicitly. This way the search engine will return all the results that match **any** of the words specified.



Exact phrase can be found with use of quotation mark. In this type of query not only list of words needs to match but also the order of the words (so for example “2017 training catalogue” and “training catalogue 2017” will return different results).

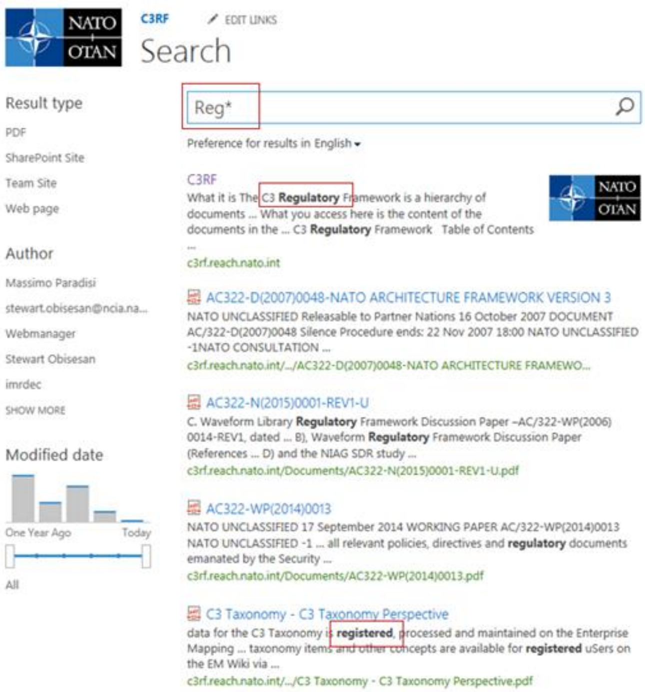


We can also match some built-in metadata to narrow search results. Syntax for this method is **property:value**, for example:



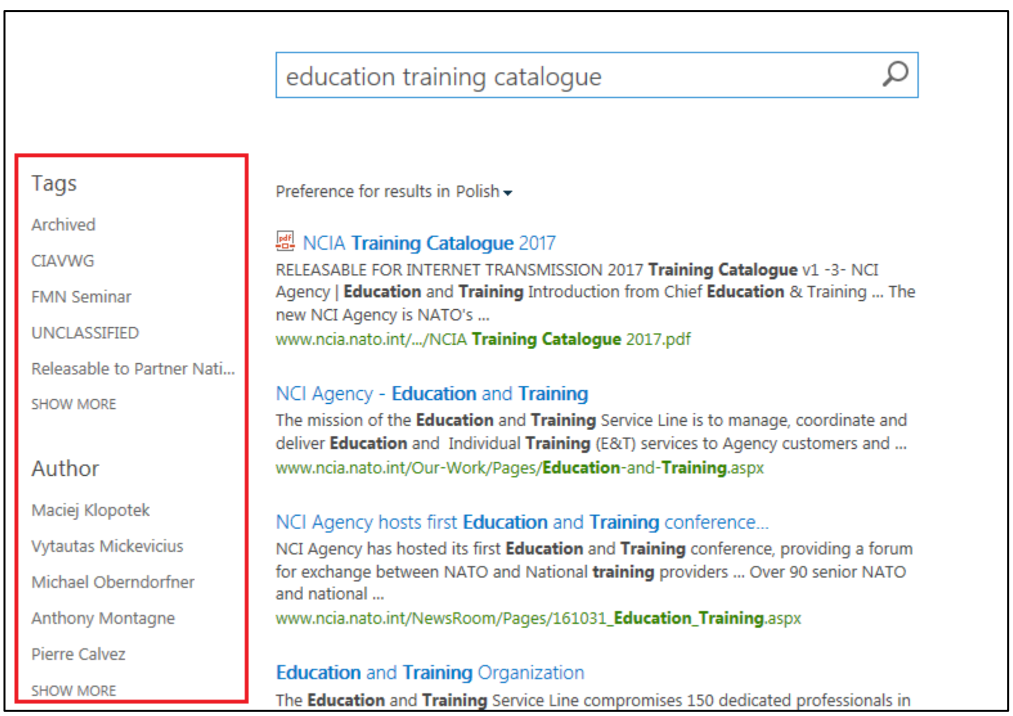
Only pdf documents (**filetype** property) matching words entered in search box will be returned. Other popular keywords that we can use for metadata search are: **author, filename, title, contenttype, size**.

The asterisk symbol (**search wildcard)** broadens search by returning results that include variations on the given term. Searching Reg* returns results that include regulatory, registered and any other words that begin with Reg-. Wildcards can only be used at the end of a word.

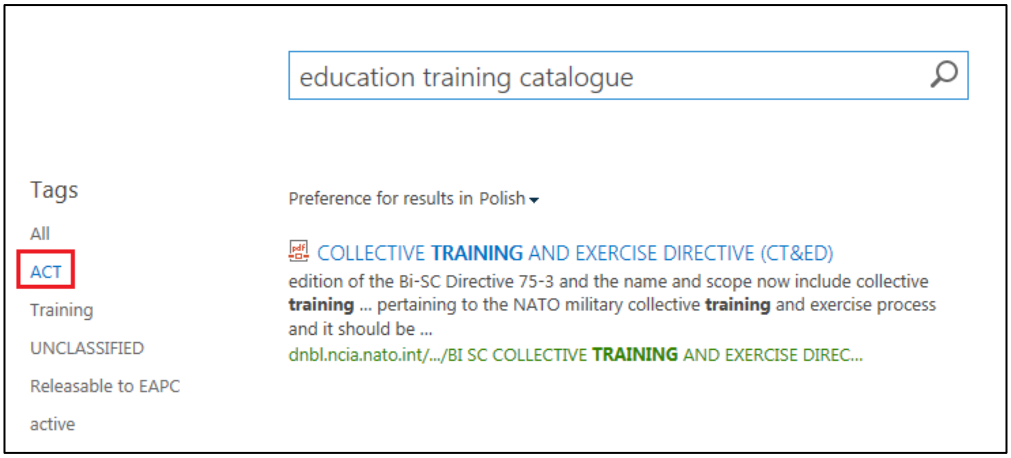


c. Refinements

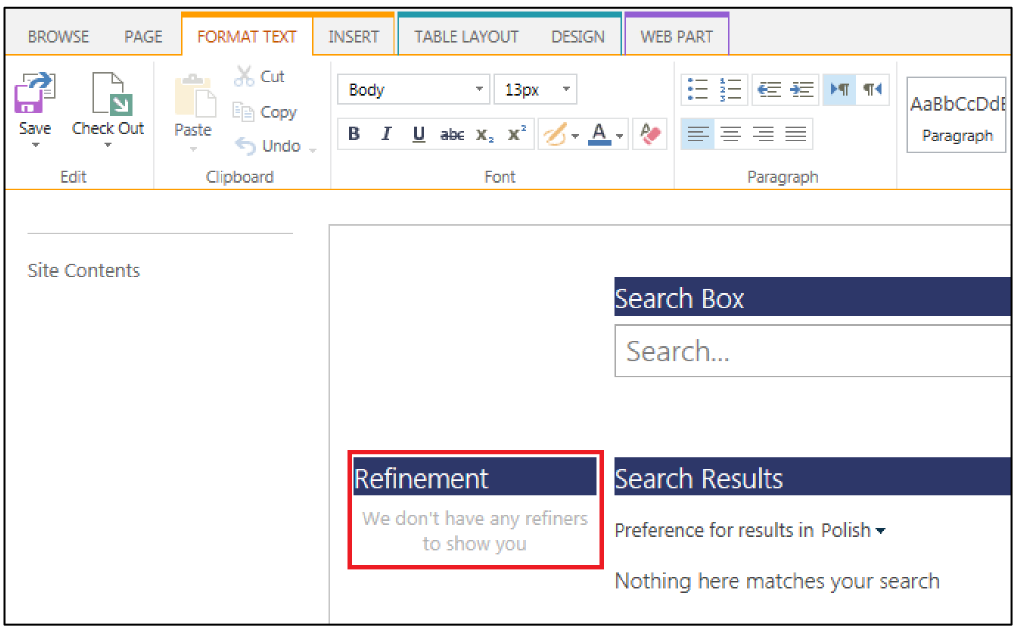
Search results page, besides search box and results list, contains also refinements panel. This panel is placed on the left side from result list and it contains some dynamically generated metadata that helps to filter out data returned in the result set.



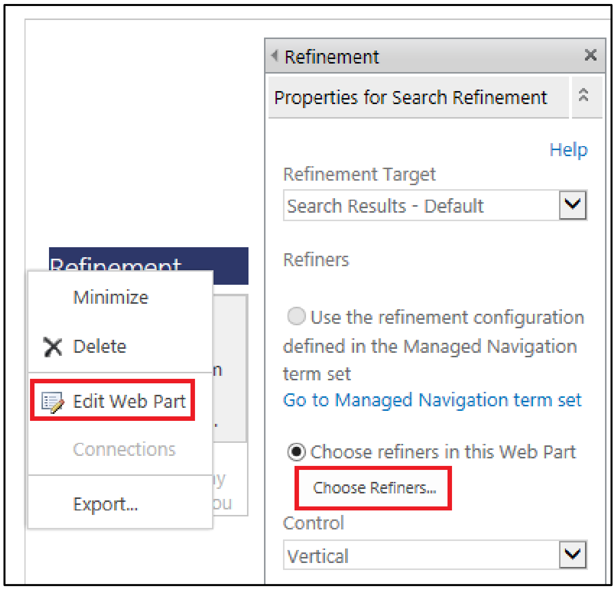
Clicking on any of the filter values from refinements panel causes results list to refresh and display results according to the filtering.



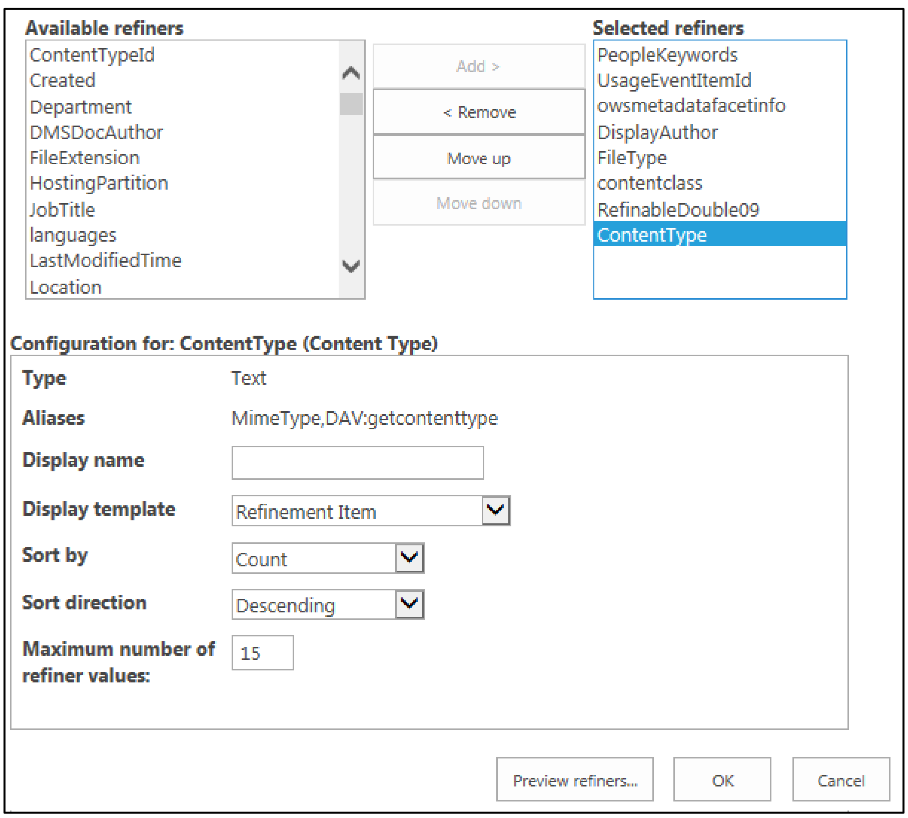
Refinements parameters can be changed by editing Refinements web part on search page.



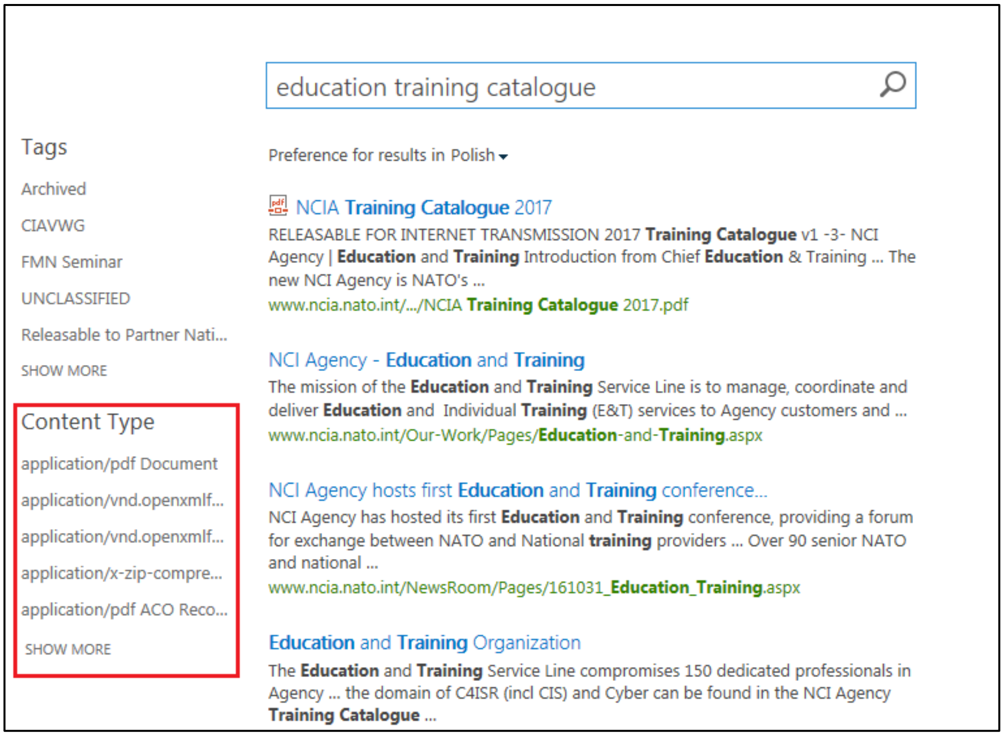
When in edit mode, Choose Refiners... button triggers refinements changes.



Refinements can be selected from predefined list of existing properties (properties come from search service). For example we may want to add Content Type refinement to the panel.



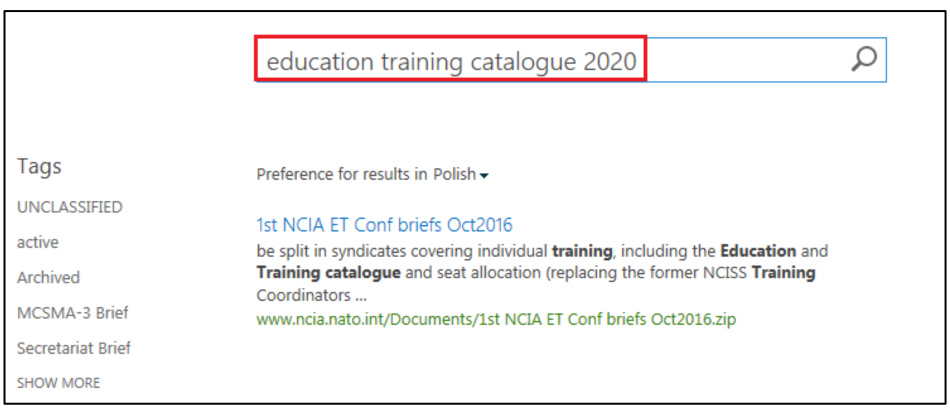
Confirm the change by clicking on OK button and saving the search page.



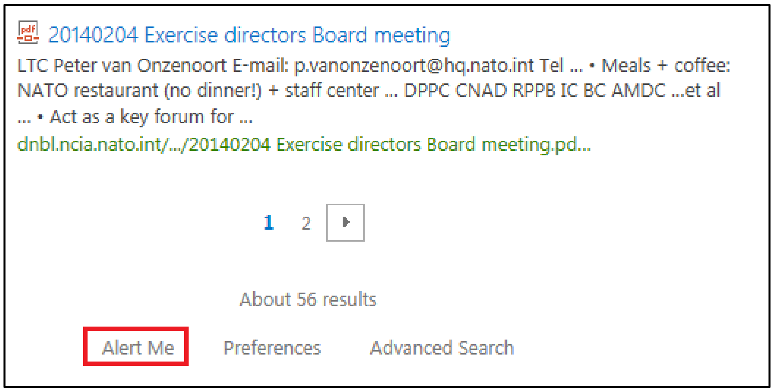
d. Search alerts

When user expects to get some search results soon and he doesn't want to wait until they're available, he can define a search alert that can inform user by e-mail or SMS when result set for given query has changed. This mechanism is called **search alert**.

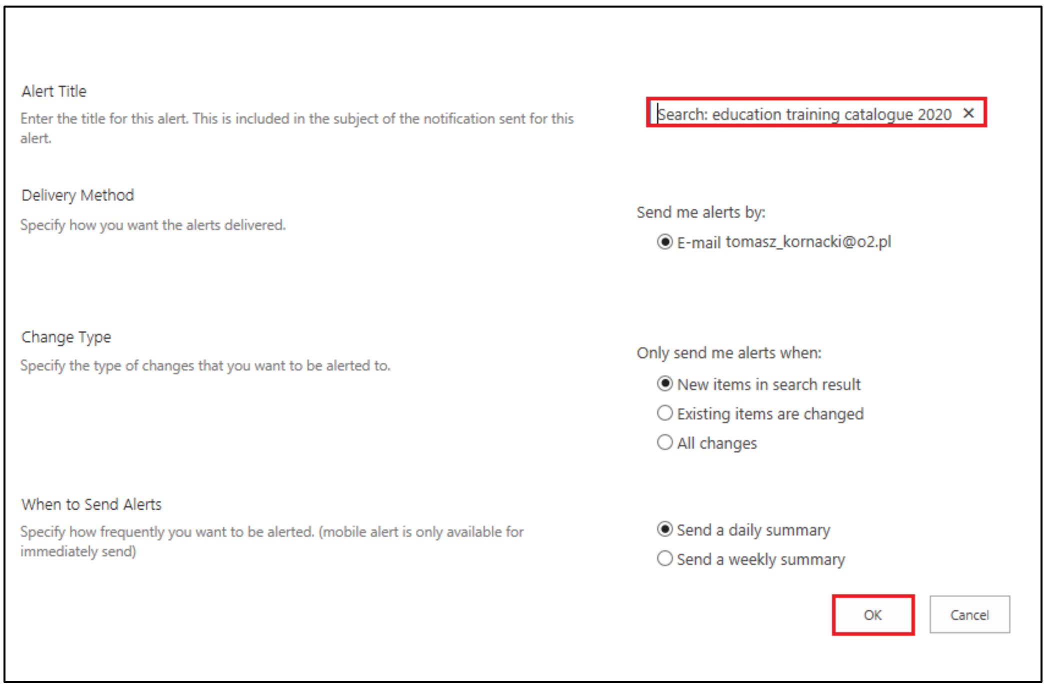
User starts by executing a query in search box.



And then under the results page there is a link button called **Alert Me**. When clicked on this button, user is redirected to alert configuration page.



User can specify name for the alert and click on OK to actually create an alert.



When new results will be discover by search engine for specified query, user will get notified (type of notification is configured by SharePoint administrators and user doesn't have any influence on it).

7. SharePoint integration with Office

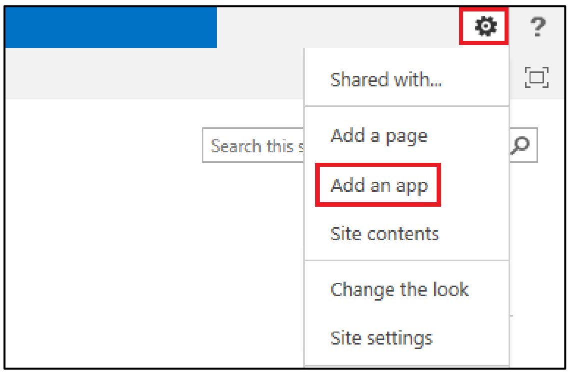
a. Excel integration

i. Importing Excel spreadsheet to SharePoint

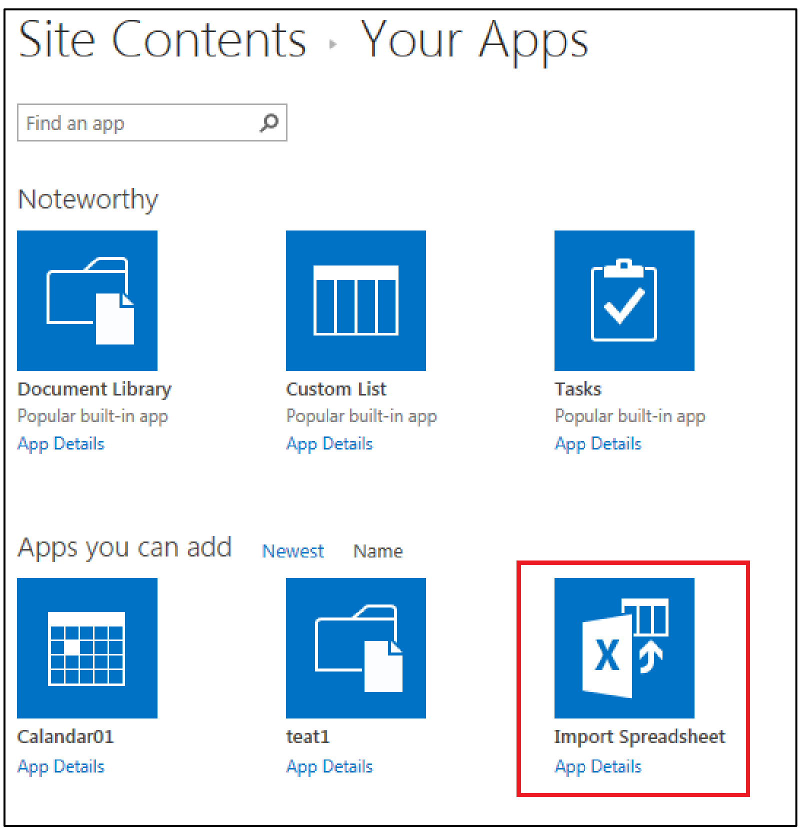
Working with data in Excel is generally very common task in day-to-day routine, but there are many cases when working with SharePoint lists is better. Two very important features of SharePoint list that are impossible in Excel are:

- Multiple users editing the same spreadsheet at the same time (in SharePoint there is no problem if for users to add / delete rows (items) to list at the same time)
- Access control on the different parts of Excel spreadsheet (different rows (items) of SharePoint list may have different permissions settings, therefore they may be visible for different users)

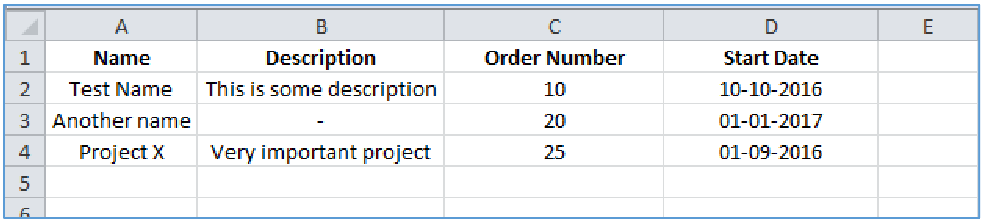
When we have our data already in Excel and we want to transfer them into SharePoint we can use Import function. To do that go to Site Actions -> Add an app page.



From this page we select Import Spreadsheet template.

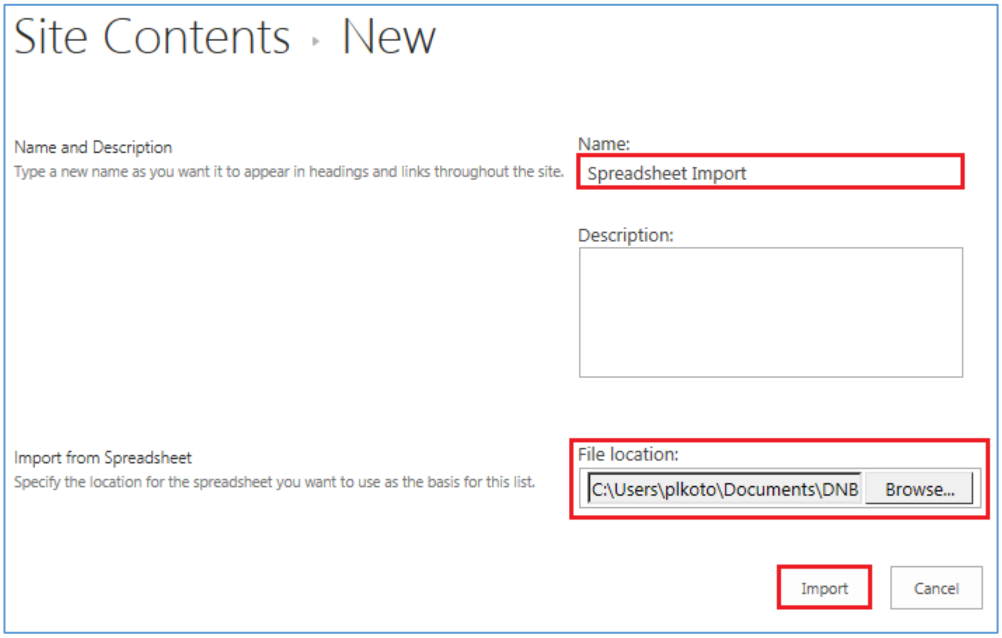


Let's say we have a simple spreadsheet:

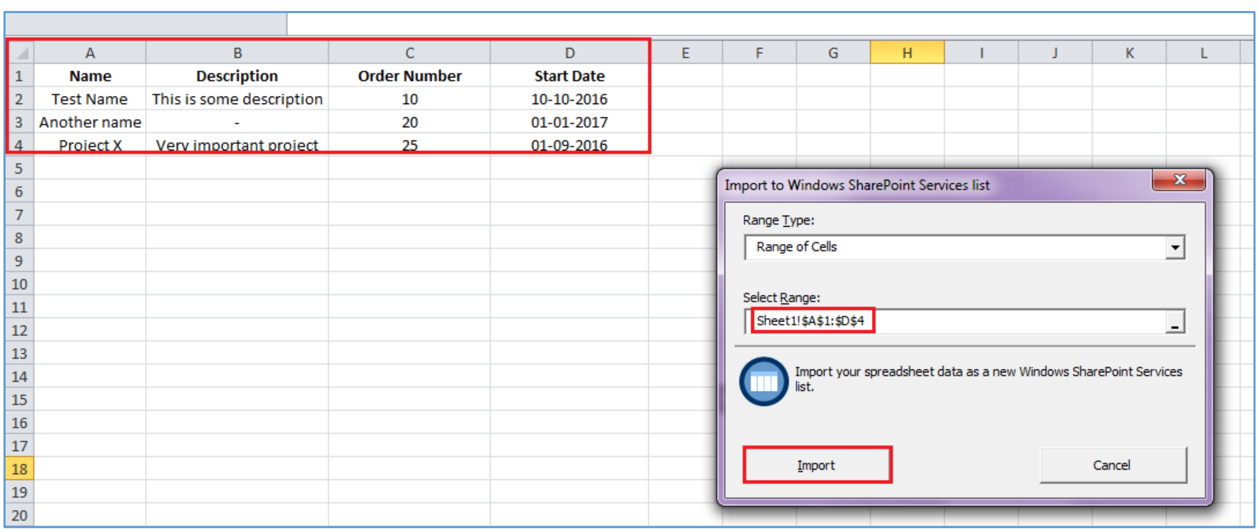


	A	B	C	D	E
1	**Name**	**Description**	**Order Number**	**Start Date**	
2	Test Name	This is some description	10	10-10-2016	
3	Another name	-	20	01-01-2017	
4	Project X	Very important project	25	01-09-2016	
5					

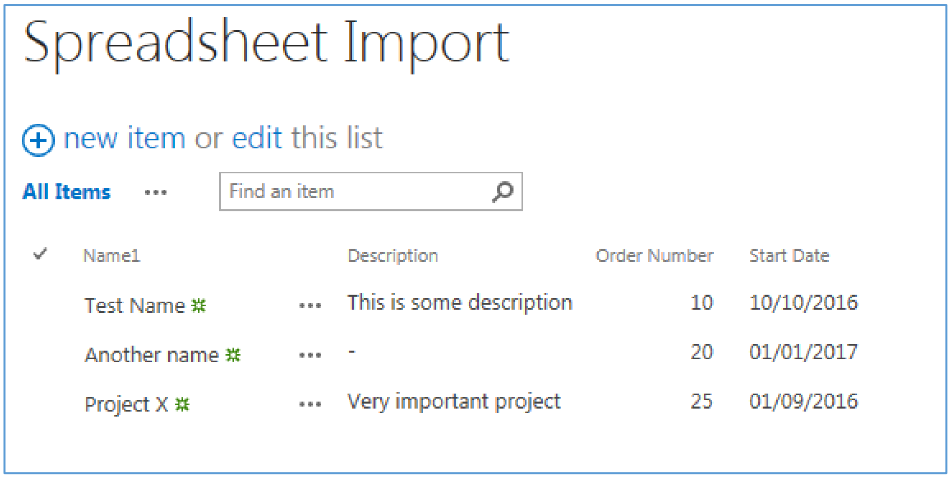
We’re using Import Spreadsheet, provide a name for new list that will be created, browse and navigate to the Excel spreadsheet file. When everything is ready we hit Import button.



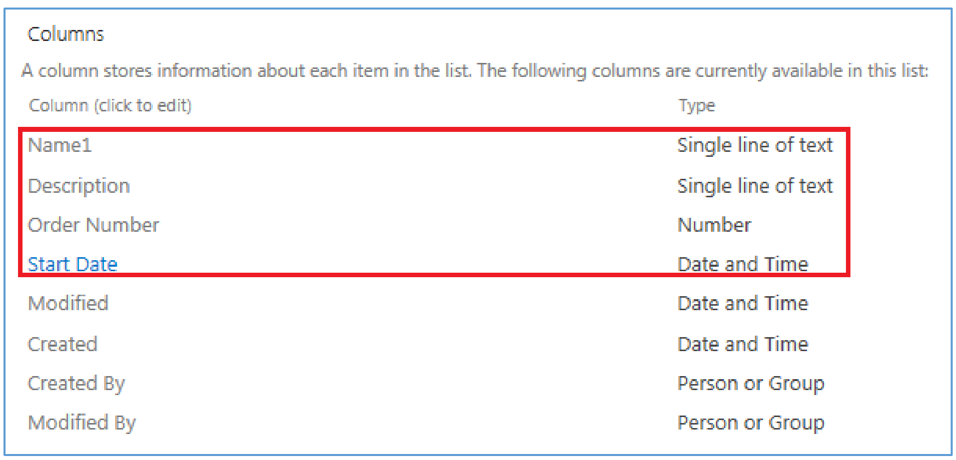
Spreadsheet will be opened in Excel and user needs to select cell range that represents data table to be imported (when done Import button should be clicked).



New list will be created and data from cells imported to rows and columns.

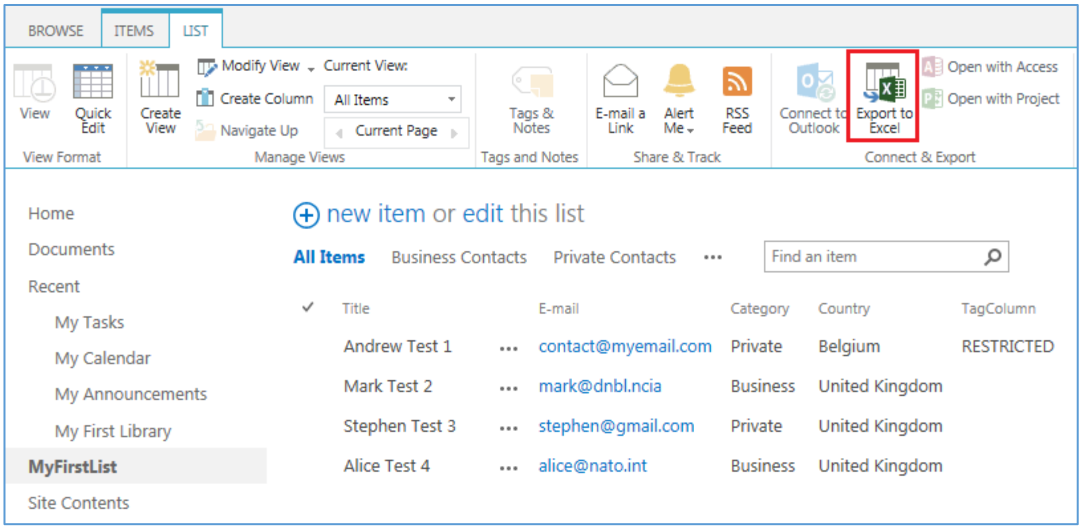


Importer application is trying to match column names and column types. Simple column types are easily translated, but more complex ones (like columns with formulas) may cause problems when trying to import them (formulas most likely will be cut off). Also any formatting will not be imported to SharePoint rows and columns.

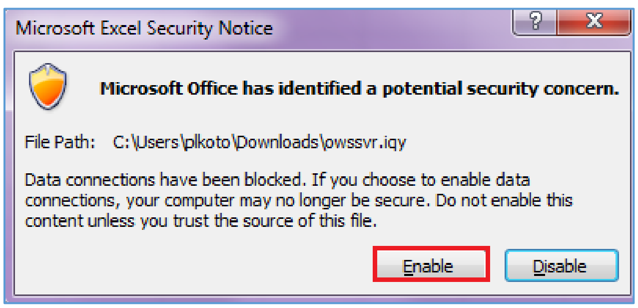


ii. Exporting from SharePoint to Excel

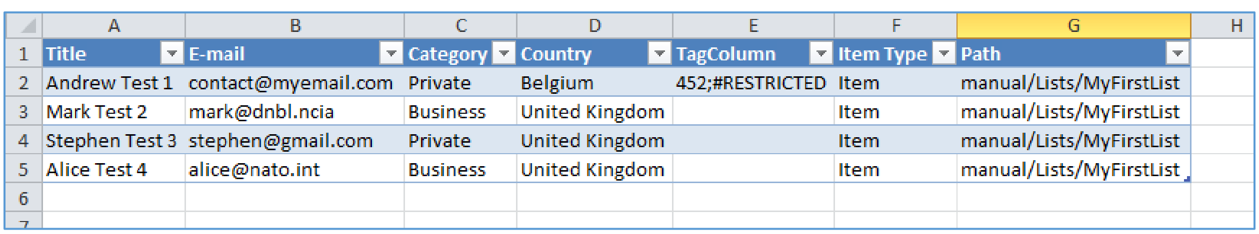
Excel export is much more common use case than importing spreadsheets to SharePoint (for example project manager may export budget information from SharePoint to Excel and create an Excel report easily and quickly to prepare for business year summary presentation). Exporting to Excel is pretty easy in SharePoint. All we need to do is to navigate to list that we need to export and click on **Export to Excel** command in SharePoint ribbon.



We may be asked for enabling data connections. It we trust the data source, we should click on **Enable** button.



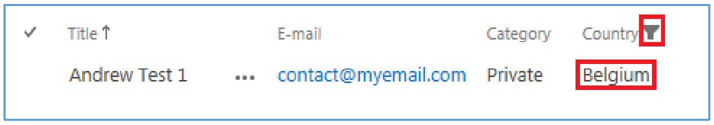
We will see exported data in Excel.



Title	E-mail	Category	Country	TagColumn	Item Type	Path
Andrew Test 1	contact@myemail.com	Private	Belgium	452;#RESTRICTED	Item	manual/Lists/MyFirstList
Mark Test 2	mark@dnbl.ncia	Business	United Kingdom		Item	manual/Lists/MyFirstList
Stephen Test 3	stephen@gmail.com	Private	United Kingdom		Item	manual/Lists/MyFirstList
Alice Test 4	alice@nato.int	Business	United Kingdom		Item	manual/Lists/MyFirstList

There are few important things to know about exporting data from SharePoint to Excel.

- Data is not as clear as expected, we may see some built-in columns exported, like content type (Item Type).
- General rule is that custom columns (created by users) that are not visible in a SharePoint view, that we are currently in, will not be exported.
- Complex data types are not always exported as we would expect. For example managed metadata columns are exported in format **(ID;#Tag)**.
- Export doesn't take SharePoint dynamic sorting and filtering into account. It will export the data as it is visible to the user when he enters data view page for the first time. So even if we remove rows with United Kingdom from our view by applying a filter:

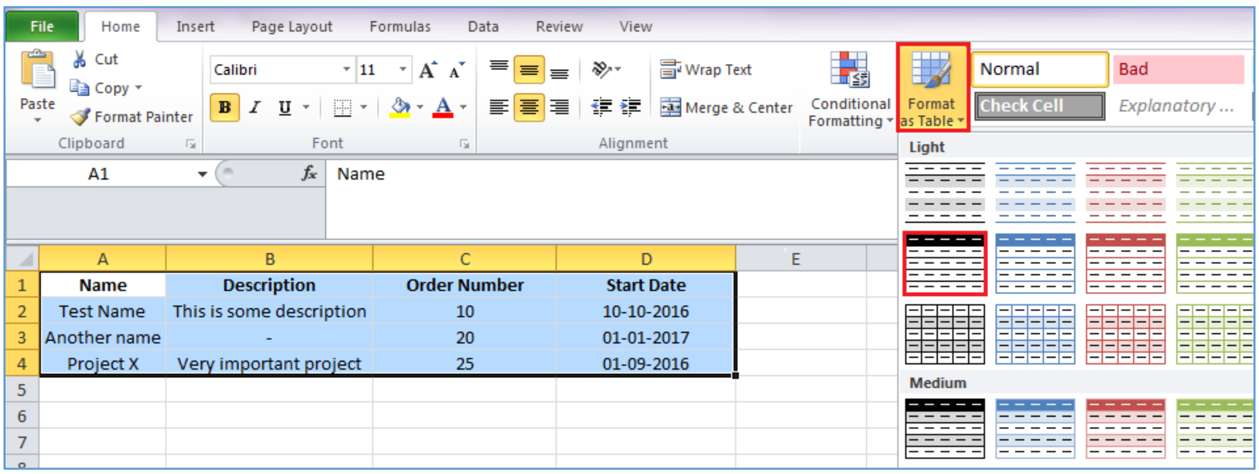


We will still see 4 items exported to Excel.

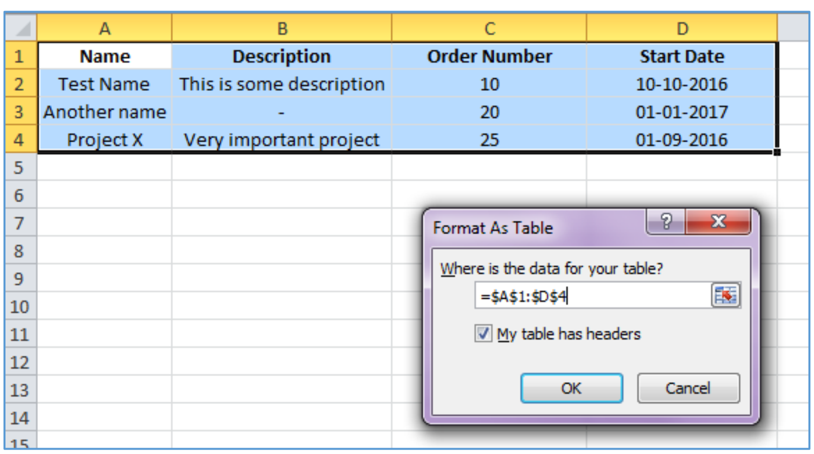
iii. Exporting Excel table to SharePoint

Another way of using Excel data in SharePoint is to export Excel table. This is very similar feature to spreadsheet import, but with some important differences.

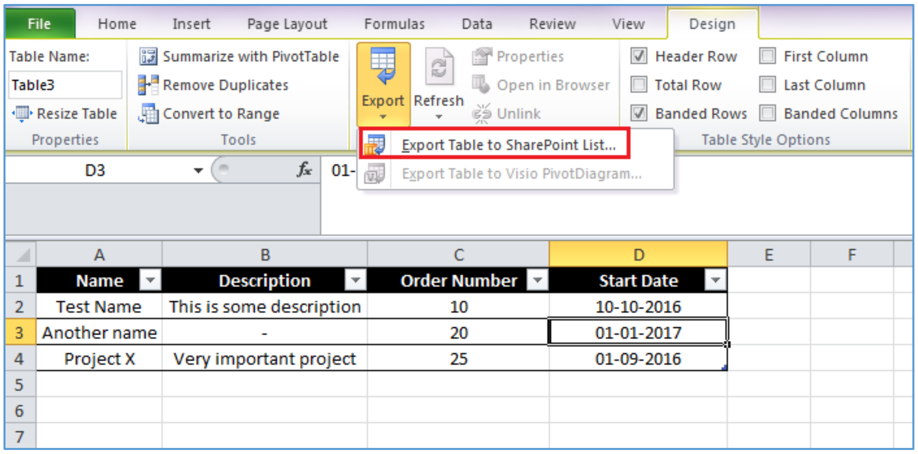
First of all we need to have a table in Excel. We select data in Excel spreadsheet that we want to turn into table and click on **Format as Table** button. Then we should apply one of the table formatting templates.



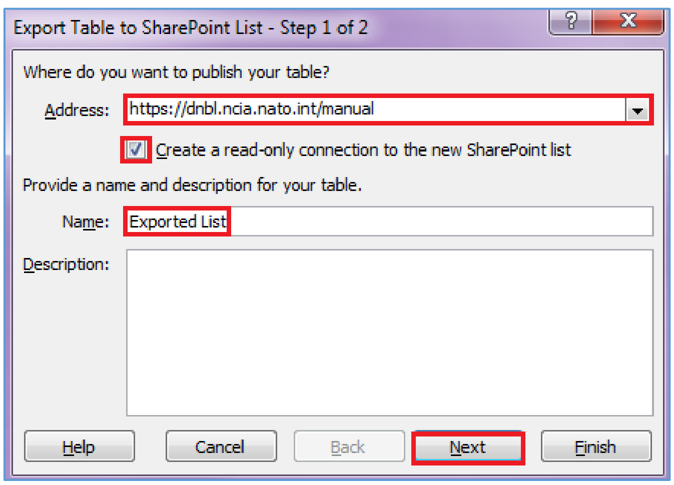
Excel will ask us for the range of our table and if our table has headers.



While still in table design mode we expand Export node and choose Export Table to SharePoint list option.

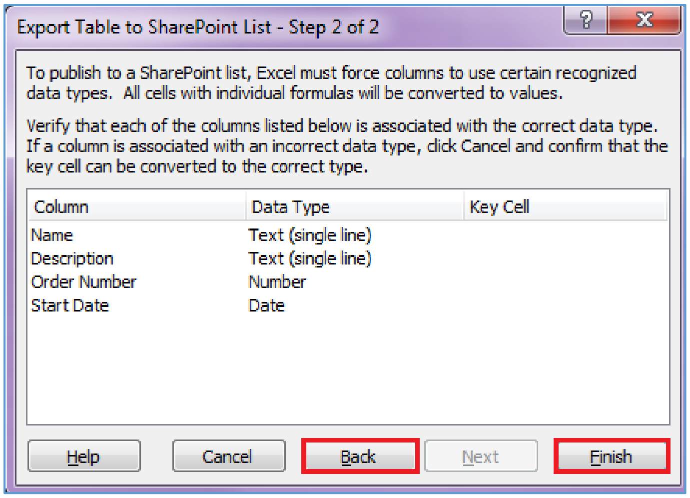


In first step we specify an URL of SharePoint site where we'd like to export an Excel table, also we specify name for the new table and click on Next.

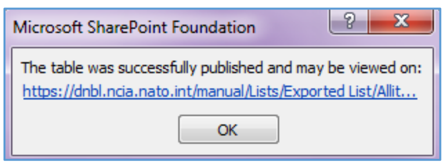


If we select an option to create a read-only connection to the list, we will be able in the future to refresh Excel spreadsheet to see changes that were made to this list in SharePoint.

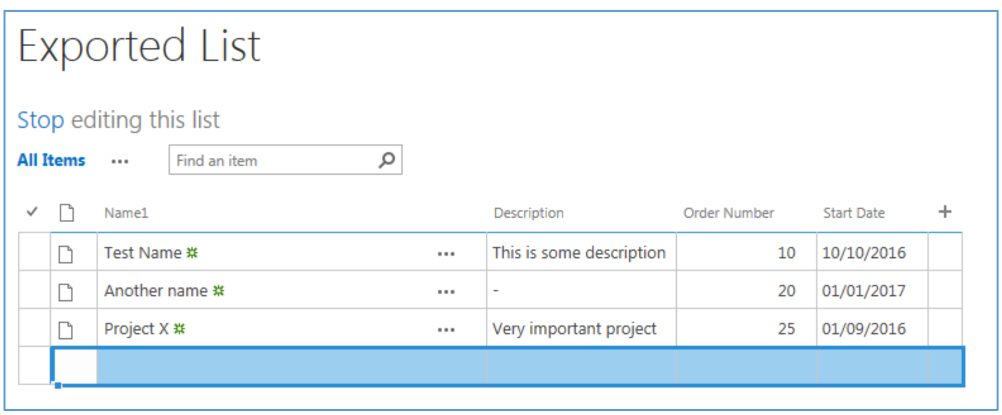
In the next step we confirm that all data types has been detected correctly. If yes, we can click on Finish button. If no, then most likely we will need to play with cell formats.



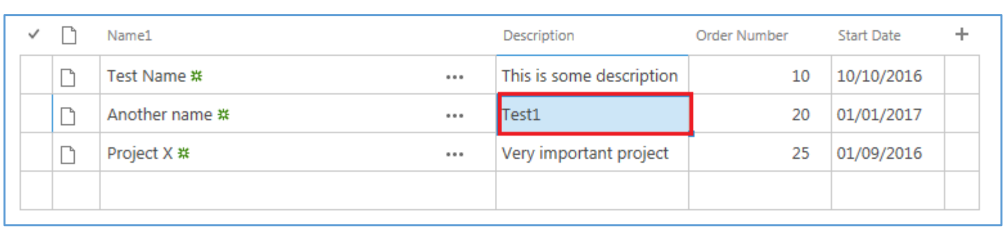
After successful export we should see the confirmation.



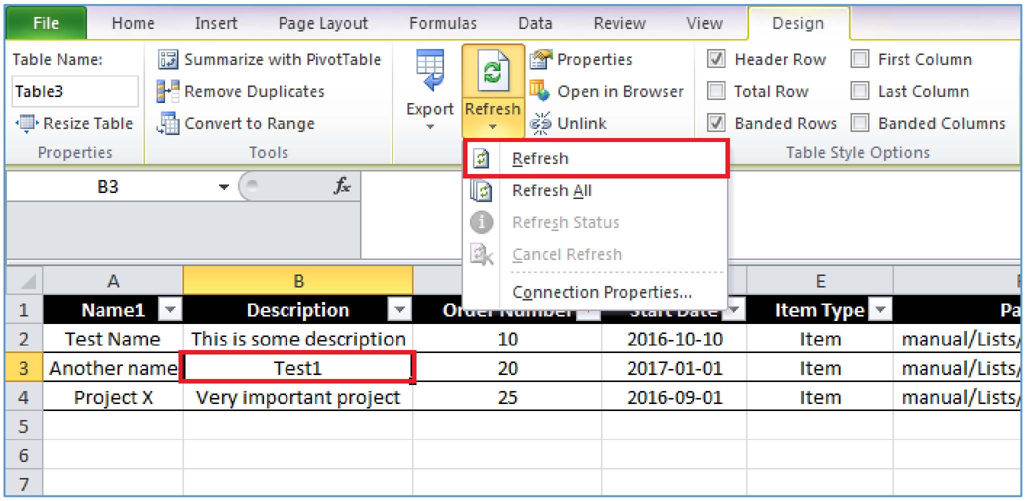
We may follow the link and see how the table looks like in SharePoint. It is opened as a list in quick edit mode.



So if we make change to the list at some place:



Then we can click on Refresh button in Excel and see updated version in our client application.



b. Outlook integration

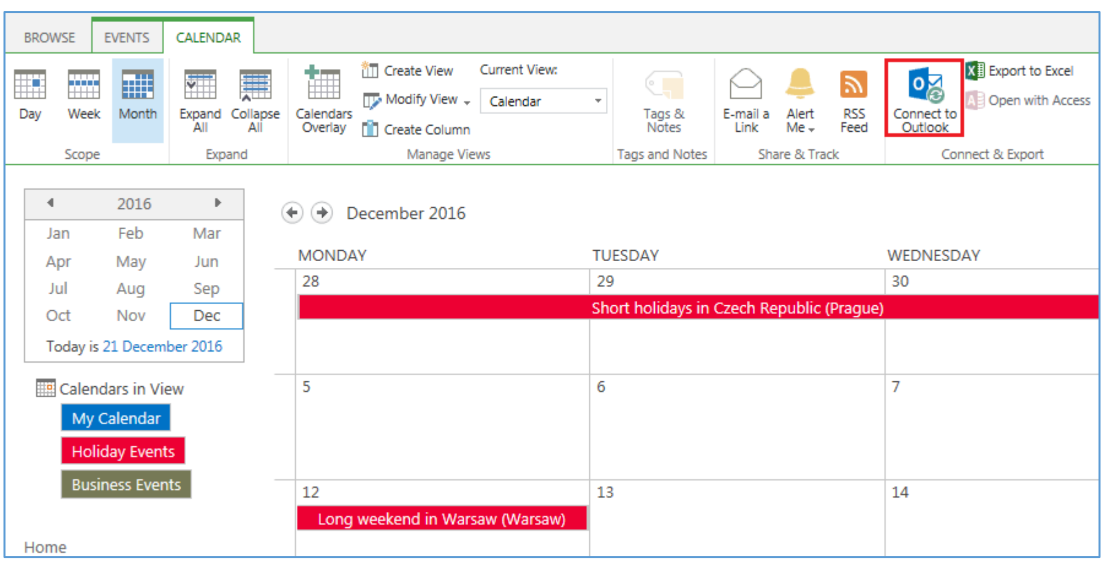
i. Introduction

There are many good reasons to keep our day-to-day calendar in Outlook. It works well with communicators / meeting infrastructure applications, uses fresh data from Active Directory and integrates with other Office applications. Outlook also supports SharePoint integration, giving users opportunity to complete some of the SharePoint activities directly from Outlook.

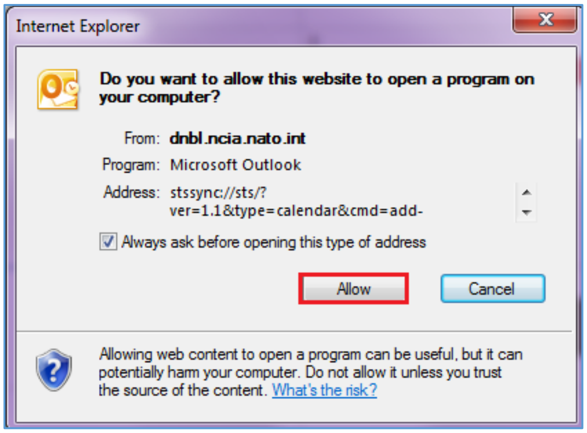
ii. Synchronizing calendar with Outlook.

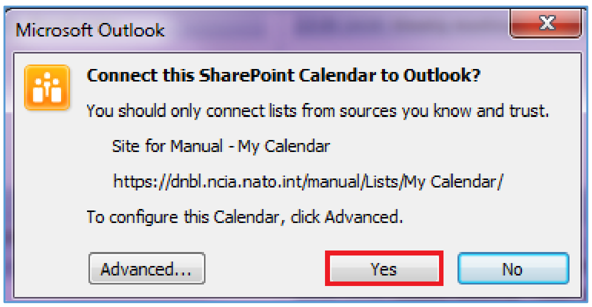
SharePoint calendar can be imported to Outlook and accessed without a need to access SharePoint site. This is very handy feature, because we can view events from different calendar sources in one aggregated view.

In order to connect Outlook with SharePoint calendar we should go to our calendar in SharePoint using web browser and click on Connect to Outlook ribbon button.

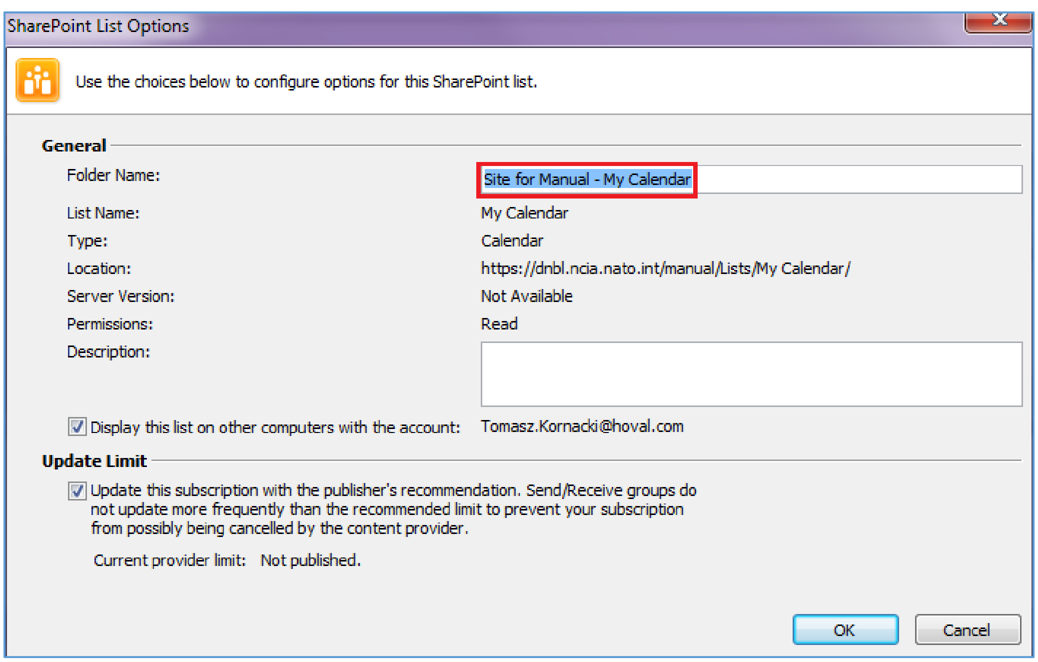


We may receive security warnings, we should go further by allowing to open calendar link.

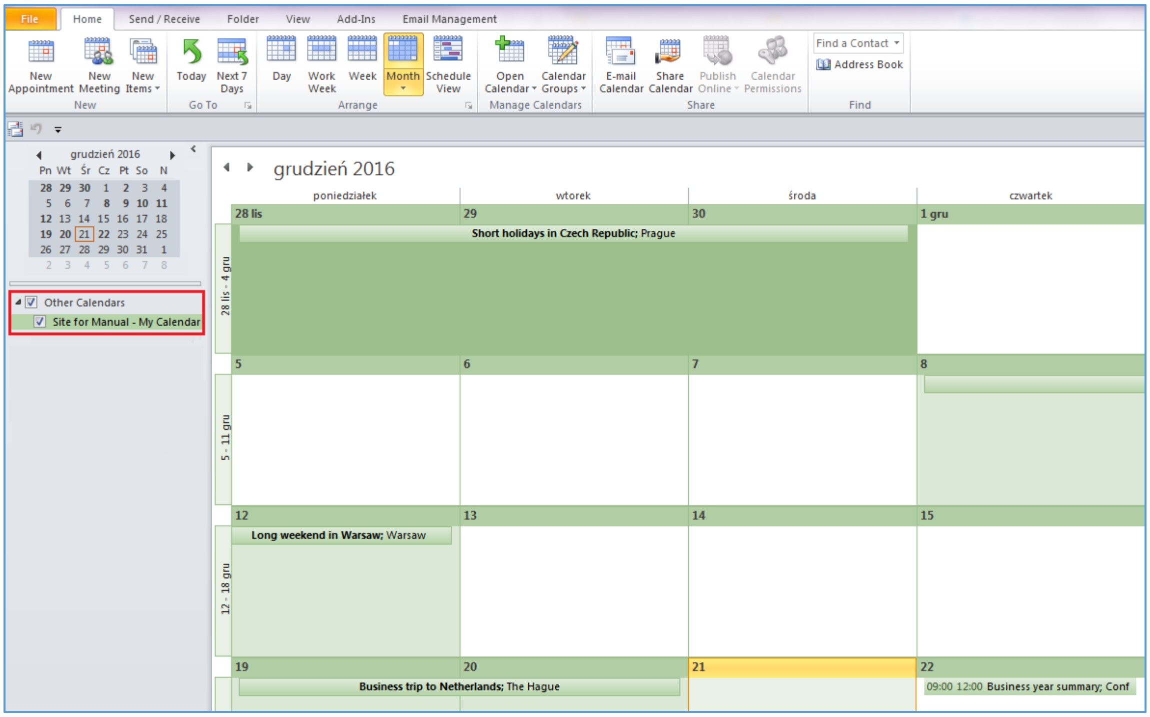




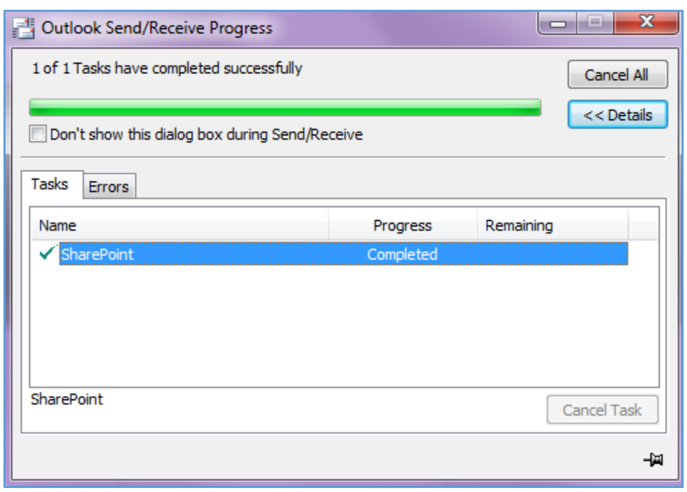
Alternatively we may set some advanced options like calendar name on additional popup after clicking on Advanced button.



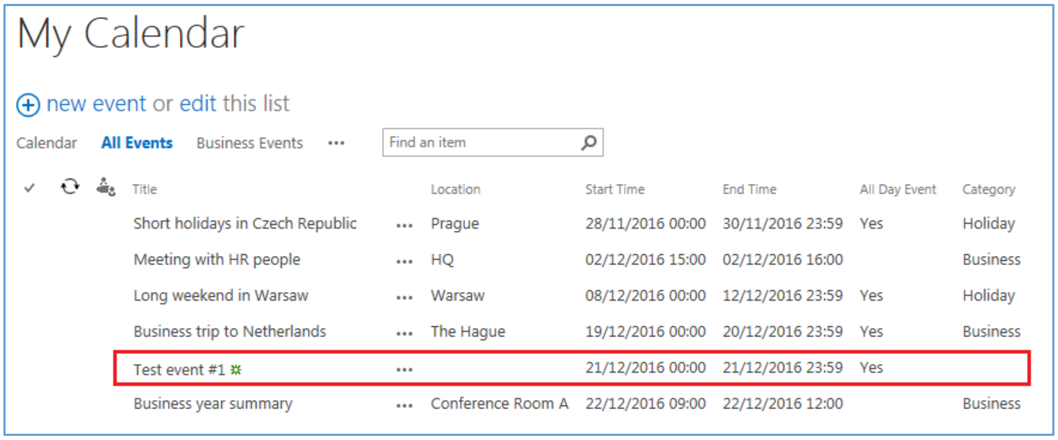
Calendar will be loaded to Outlook with all events.



Events created in Outlook will be synchronized with SharePoint every time when Send / Receive action is performed.



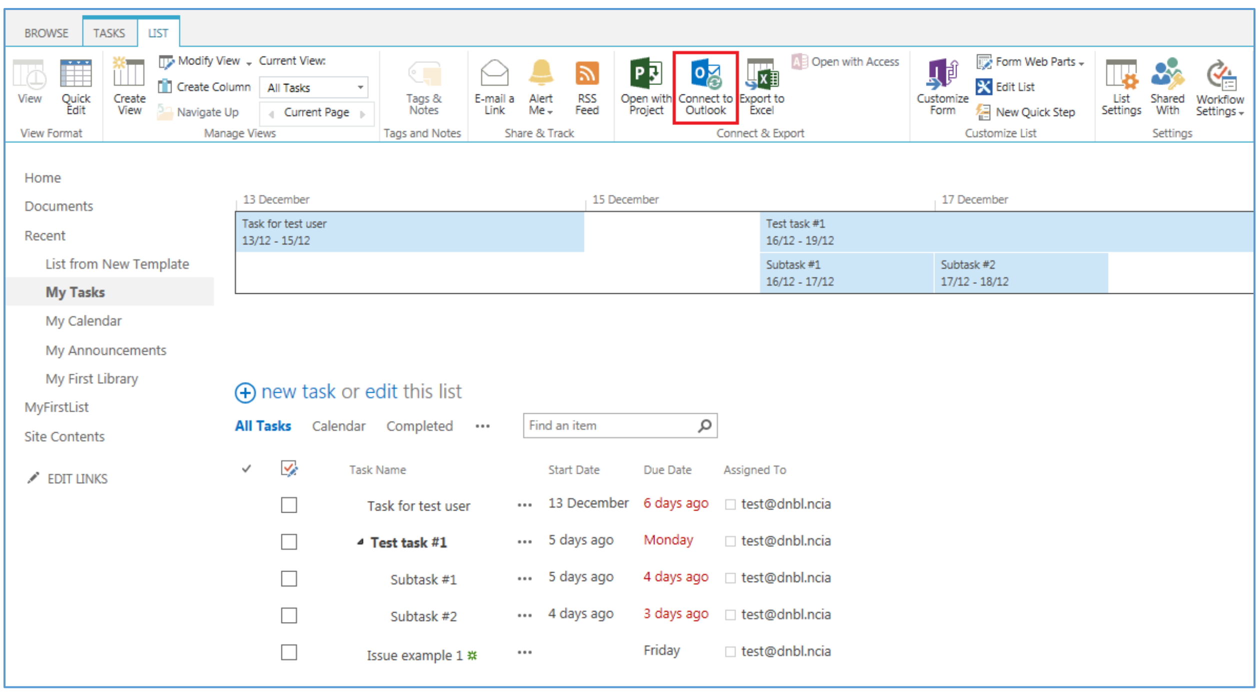
Calendar item will be available in SharePoint after synchronization.



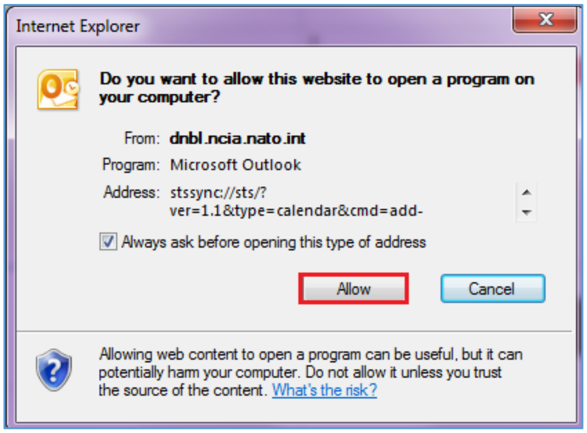
It also works the other way. Events created in SharePoint will get synchronized and displayed in Outlook calendar.

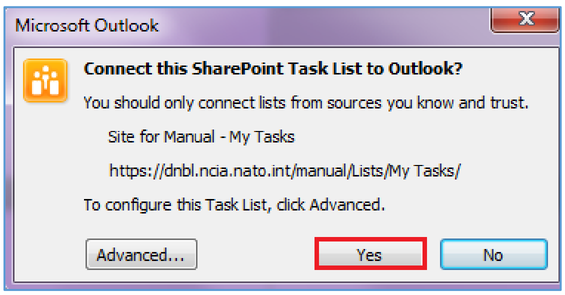
iii. Synchronizing task list with Outlook

Task list can be also synchronized with Outlook so users can manage tasks from different task lists in one place. In order to synchronize task list with Outlook, we have to go task list in SharePoint and select **Connect to Outlook** from SharePoint ribbon.

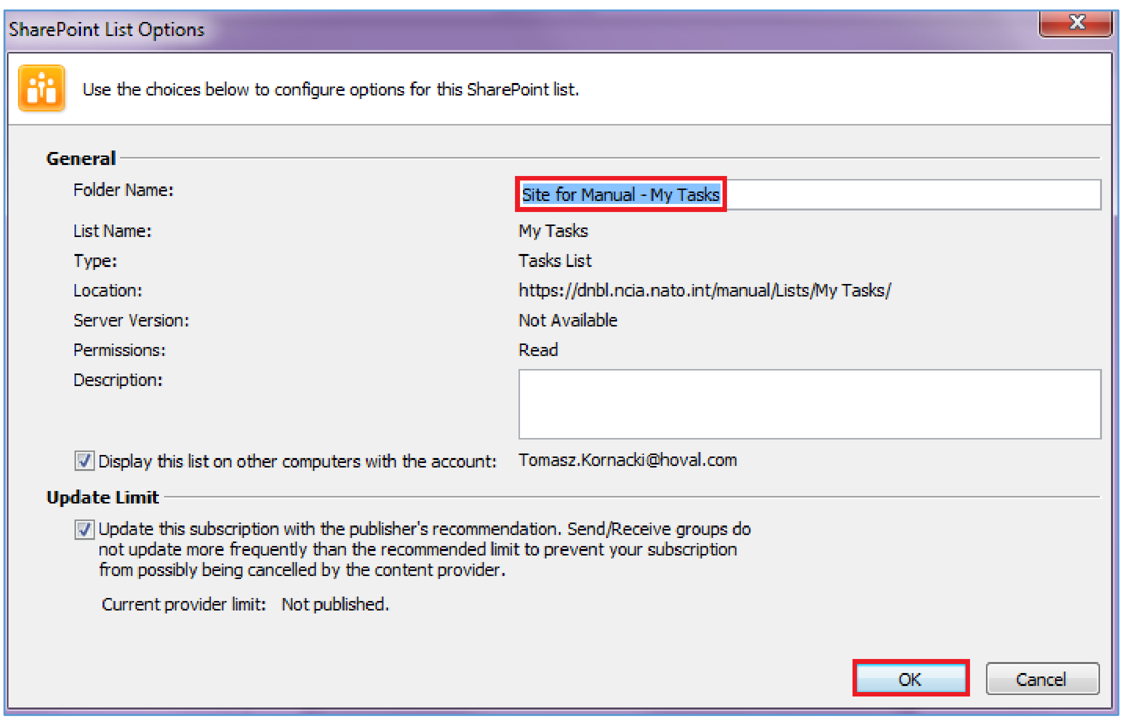


We may receive security warnings, we should go further by allowing to open tasks link.

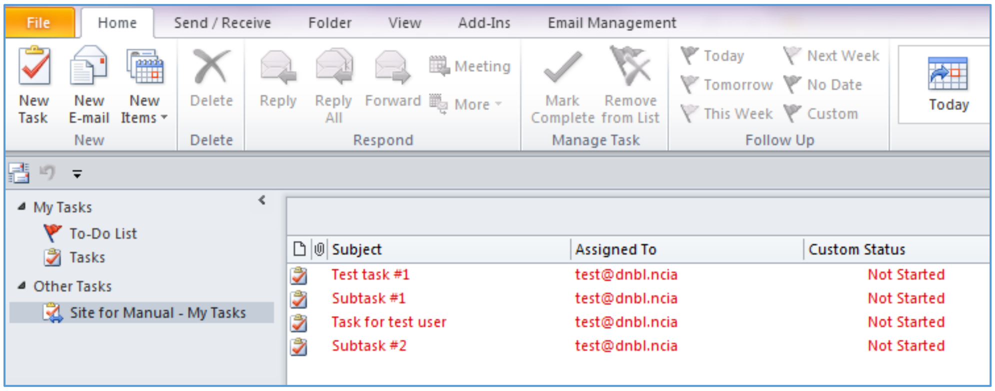




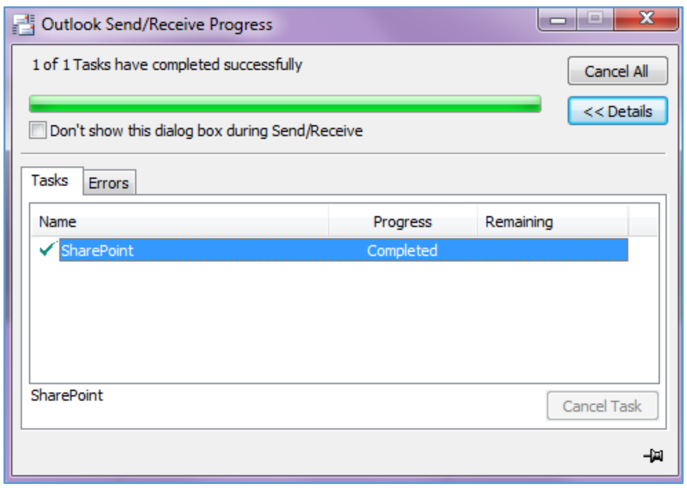
Alternatively we may set some advanced options like task name on additional popup after clicking on Advanced button.



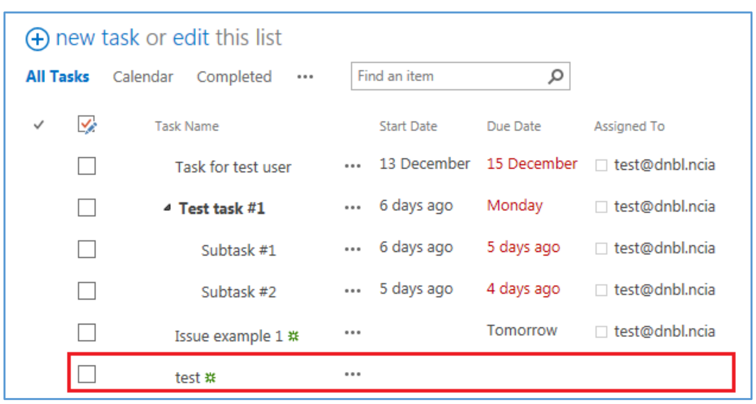
Task list will be loaded to Outlook with all tasks.



Tasks created in Outlook will be synchronized with SharePoint every time when Send / Receive action is performed.



Task item will be available in SharePoint after synchronization.



It also works the other way. Tasks created in SharePoint will get synchronized and displayed in Outlook task list.