

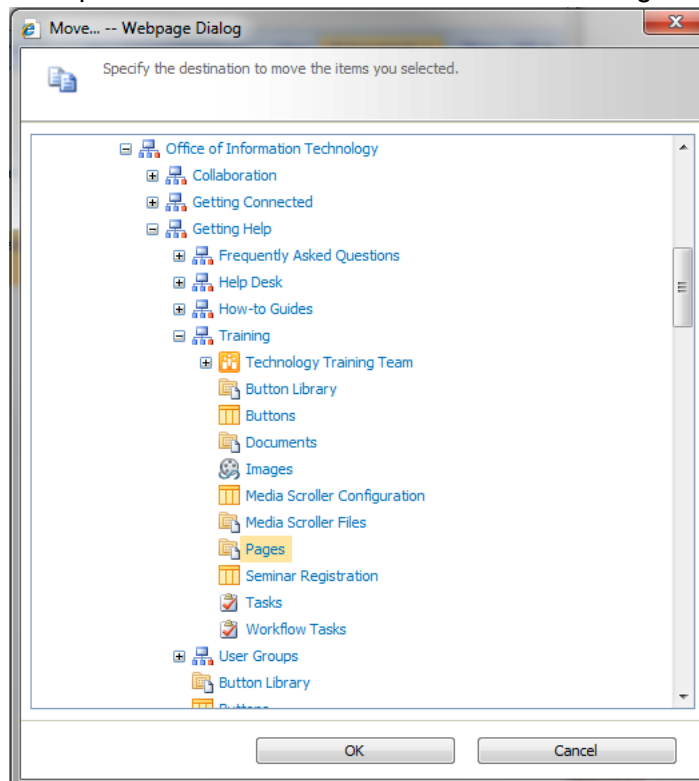
Site Owners Permissions

Organize Pages in a Web Site

1. Click the **Site Actions** menu and select the **Manage Content and Structure** option. The Site Content and Structure page will open.



2. In the navigation pane, click the **Pages** folder. The contents will be displayed in the contents pane.
3. Select the checkboxes for the files you would like to move.
 4. Click the **Move** option in the **Actions** menu. The Move dialog box will appear.



5. Click the folder for the sub site to which you want to move the files.
6. Click **OK**. The Move dialog box will close and the files will be moved to the new folder.

Create a Sub Site

1. Click the **Site Actions** menu and select **New Site**. The Create site dialog box will open. If you do not see the New Site option, you do not have the proper authorization. Please contact your administrator.
2. Click the icon of the type of Site you would like to create. The information for that type of Site will appear in the right pane.
3. Type a title for your site in the Title field. The title of your site should be descriptive and can be up to about 50 letters before becoming intrusive.
4. Type a short, descriptive name for your team in the URL Name field. This will become part of the full Web Site Address for your new subsite.
5. To add more settings for the site, click **More Options**. The advanced dialog box will appear.

The screenshot shows a 'Create' dialog box for a 'Team Site'. The dialog is divided into several sections: 'Title and Description', 'Web Site Address', 'Permissions', and 'Navigation Inheritance'. The 'Title and Description' section has fields for 'Title' and 'Description'. The 'Web Site Address' section has a 'URL name' field with the example 'https://qaweb.cmich.edu/servic.../'. The 'Permissions' section has two radio buttons: 'Use unique permissions' and 'Use same permissions as parent site', with the latter selected. The 'Navigation Inheritance' section is partially visible. On the right side, there is a search bar 'Search Installed Items' and a preview for 'Team Site' with a description: 'A site for teams to quickly organize, author, and share information. It provides a document library, and lists for managing announcements, calendar items, tasks, and discussions.' At the bottom, there are 'Create' and 'Cancel' buttons.

6. Type a description for your site in the Description field. The description is like a sub-title that will be displayed on some of the pages. It should further clarify the title so that anyone can understand the site's purpose.
7. In the User Permissions field, select the **Use same permissions as parent site** option. You can change to unique permissions later as shown in "Assign Users to a Group."
8. In the **Use the top link bar from the parent site** field, select the **Yes** option.

Navigation Inheritance

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

Use the top link bar from the parent site?

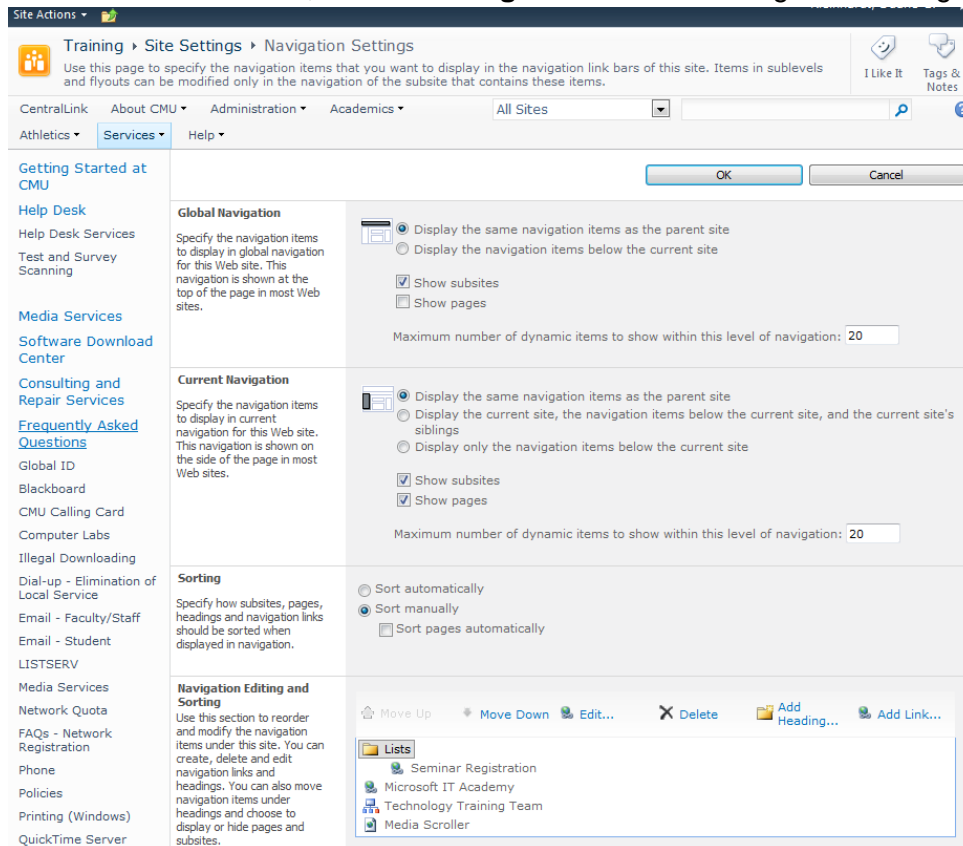
Yes No

9. Click **Create**. The Processing screen will briefly appear, followed by the newly created page.

Customize Site Navigation

1. Click the **Site Actions** menu and select **Site Settings**. The Site Settings page will open.

- In the **Look and Feel** section, click the **Navigation** link. The Navigation Settings page will



open.

- In the **Sorting** section, select the **Sort manually** option.
- In the **Navigation Editing and Sorting** section, select the **Current Navigation** folder then click **Add Link**. The Navigation Link dialog box will open.
- Add the pertinent information, using the Browser button to find the correct URL.
- Click **OK**. The new link will be visible in the **Navigation Editing and Sorting** section.
- Click the new link to select it, then click **Move Up** until the menu item is listed in the order you desire.
- Click **OK**. The Site Settings page will open and the new link will be visible in the site's navigation menu.

Manage Groups

Create a New Group

- Navigate to the site where you want to add a group. The site's home page will open.
- Click the **Site Permissions** option on the **Site Actions** menu. The Permission Tools page will open.

3. Click **Create Group**. The Create Group page will open.

Site Actions

Training > Site Settings > Create Group

Create a new SharePoint group. This group will be available throughout this Site Collection.

This site is using the same permissions as its parent site. The group you create will not automatically get permission to this site. To give a group permission to this site you need to give the group permission on the parent site.

CentralLink About CMU Administration Academics Athletics Services Help

Getting Started at CMU
Help Desk
Help Desk Services
Test and Survey Scanning

Media Services
Software Download Center
Consulting and Repair Services

Frequently Asked Questions
Global ID
Blackboard
CMU Calling Card
Computer Labs
Illegal Downloading
Dial-up - Elimination of Local Service
Email - Faculty/Staff
Email - Student
LISTSERV
Media Services
Network Quota
FAQs - Network Registration
Phone
Policies

Name and About Me Description
Type a name and description for the group.

Name:
About Me:

Owner
The owner can change anything about the group such as adding and removing members or deleting the group. Only one user or group can be the owner.

Group owner:
Kleinhardt, Duane C. ;

Group Settings
Specify who has permission to see the list of group members and who has permission to add and remove members from the group.

Who can view the membership of the group?
 Group Members Everyone

Who can edit the membership of the group?
 Group Owner Group Members

Membership Requests
Specify whether to allow users to request membership in this group and allow users to request to leave the group. All requests will be sent to the e-mail address specified. If auto-accept is enabled, users will automatically be added or removed when they make a request.

Caution: If you select yes for the Auto-accept requests option, any user requesting access to this group will automatically be added as a member of the group and receive the permission levels associated with the group.

Allow requests to join/leave this group?
 Yes No

Auto-accept requests?
 Yes No


Send membership requests to the following e-mail address:
klein1dc@cmich.edu

4. Type a name for the group in the Name field. When naming the group, consider the people that will be added, not necessarily the permissions that you'll be assigning to them.
5. Type a description for the group in the About Me field. Note that rich text editing tools are present, giving you the capability to format the description however you wish.
6. If the owner of the group is not to be you, delete your user name and enter the appropriate one in the Group Owner field. The owner will always be able to manage group membership. By changing the owner to someone else, you can allow them to modify the group. Users, such as Site Collection administrators, will also be able to modify the group membership.
7. If you want all members of your site to see who's in this group, click the **Everyone** radio button for the Who can view the membership of this group field. Otherwise, leave **Group Members** selected. You might want to make the members private if the confidentiality of the members should be maintained.
8. Indicate who can edit members in the group by clicking the **Group Owner** or **Group Members** radio button for the Who can edit the membership of this group field. Typically only the group owner can edit group membership. However, if all of the members are highly trusted, you have the opportunity to allow any of them to modify membership.
9. Click the appropriate option to allow requests to join or leave the group. You may want to allow requests to join or leave the group if you're setting up a volunteer team to support an initiative.
10. Click the appropriate option to auto-accept requests. It is recommended that you keep this option set at No. Auto-accepting could make it difficult to manage the comings and goings of your group. However, if you are working with a volunteer group, such as those helping with the company picnic, auto-accepting requests may be appropriate.

11. If you chose to allow requests, enter the appropriate e-mail address for users to send such requests. Warning: not every server is properly configured to accept inbound email messages.
12. Click **Create**. The new group will appear in the People and Groups page. You can now add users, as explained in “Assign Users to a Group.”

Assign Users to a Group

1. Select the **Site Actions, Site Settings** menu command. The Site Settings page will open.
2. Click the **People and Groups** link in the Users and Permissions group. The People and Groups page will open.
3. In the Quick Launch, click the link for the group to which you want to add users. That group’s list will open.
4. Click the arrow beside **New**. The New menu will appear.
5. Click **Add Users**. The Grant Permissions dialog box will open.

6. Type in the name of the user in the Users/Groups field and click on the **Check Names** icon . If the user is part of the authenticated network, their name will be underlined, which means they are authorized. If a user is not recognized, a red squiggly line will appear. You will need to correct the user name.
7. Add additional names, separating the names with semicolons.
8. Click **OK**. The Grant Permissions dialog box will close and the user will appear in the group list on the People and Groups page.

Remove Users from a Group

1. Select the **Site Actions, Site Settings** menu command. The Site Settings page will open.
2. Click the **People and groups** link. The People and Groups page will open.

3. In the **Groups** list, click the group from which you want to remove a user. The Group page will open.
4. Click the checkbox of the user(s) you want to remove. The user is selected.
5. Click the **Actions** menu and select **Remove Users from Group**. A confirmation dialog box will open.
6. Click **OK**. The user will be removed from the group.

Edit Group Settings

1. Select the **Site Actions, Site Settings** menu command. The Site Settings page will open.
2. Click the **People and groups** link. The People and Groups page will open.
3. In the **Groups** list, click the group you want to edit. The Group page will open.
4. Click the **Settings** menu and select **Group Settings**. The Change Group Settings page will open.
5. Make the changes you need, then click **OK**. You'll find more information about the fields on this page and what they do in "Create a New Group." The changes will be applied to the group.

Remove a Group

1. Select the **Site Actions, Site Settings** menu command. The Site Settings page will open.
2. Click the **People and groups** link. The People and Groups page will open.
3. In the **Groups** list, click the group you want to edit. The Group page will open.
4. Click the **Settings** menu and select **Group Settings**. The Change Group Settings page will open.
5. Scroll to the bottom and click the **Delete** button.

Manage Work Flows

Create a Workflow

1. Navigate to the document library that needs a workflow started.
2. In the **Library Tools** tab, click the **Library** sub-tab. The Library Tools ribbon will open.
3. Click the **Library Settings** button. The Document Library Settings page will open.

4. Click the **Add a workflow** link. The Add a Workflow page will open.

Site Actions

Office of Information Technology
CENTRAL MICHIGAN UNIVERSITY

Technology Training Team > Site Pages > Document Library Settings > Add a Workflow

Use this page to set up a workflow for this document library.

I Like It Tag & Notes

Technology Training Team

Workflow

Select a workflow to add to this document library. If the workflow template you want does not appear, contact your administrator to get it added to your site collection or workspace.

Select a workflow template:

- Disposition Approval
- Three-state Approval - SharePoint 2010
- Collect Feedback - SharePoint 20

Description: Manages document expiration and retention by allowing participants to decide whether to retain or delete expired documents.

Name

Type a name for this workflow. The name will be used to identify this workflow to users of this document library.

Type a unique name for this workflow:

Task List

Select a task list to use with this workflow. You can select an existing task list or request that a new task list be created.

Select a task list:

- Tasks

Description: Use the Tasks list to keep track of work that you or your team needs to complete.

History List

Select a history list to use with this workflow. You can select an existing history list or request that a new history list be created.

Select a history list:

- Workflow History (new)

Description: A new history list will be created for use by this workflow.

Start Options

Specify how this workflow can be started.

- Allow this workflow to be manually started by an authenticated user with Edit Item permissions.
- Require Manage Lists Permissions to start the workflow.
- Start this workflow to approve publishing a major version of an item.
- Start this workflow when a new item is created.
- Start this workflow when an item is changed.

OK Cancel

5. Select a workflow template from the drop-down menu.
 - a. If the template you want doesn't appear contact your administrator to have it added to your site collection.
6. Type a name for this workflow on this page
7. Select a Task List from the drop-down menu
 - a. Select from an existing Task List or request that a new Task List be created.
8. Select the Start Options for this new Workflow
9. Click the **OK** button.
10. The new workflow now appears in the workflow settings page

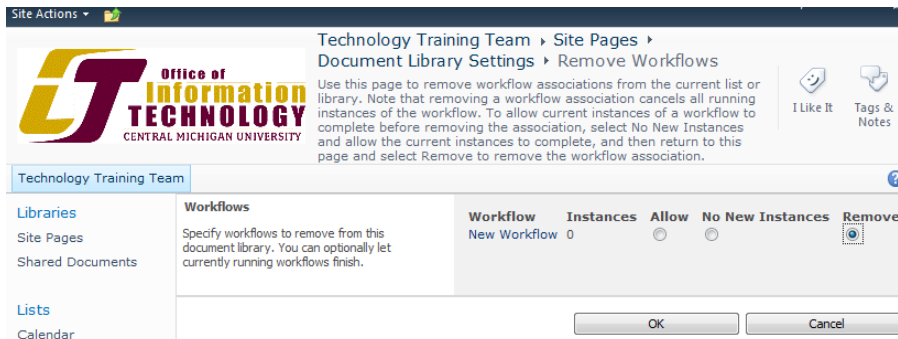
Edit a Workflow

1. Navigate to the document library that needs to have the workflow edited
2. In the **Library Tools** tab, click the **Library** sub-tab. The Library Tools ribbon will open.
3. Click the **Library Settings** button. The Document Library Settings page will open.
4. Click on the name of the workflow to be edited.
5. Make the needed changes to the workflow.
6. Click **OK**.

Remove a Workflow

1. Navigate to the document library that needs to have the workflow removed.
2. In the **Library Tools** tab, click the **Library** sub-tab. The Library Tools ribbon will open.
3. Click the **Library Settings** button. The Document Library Settings page will open.
4. Click on the **Remove a workflow** link.

5. Select the **Remove** radio button.



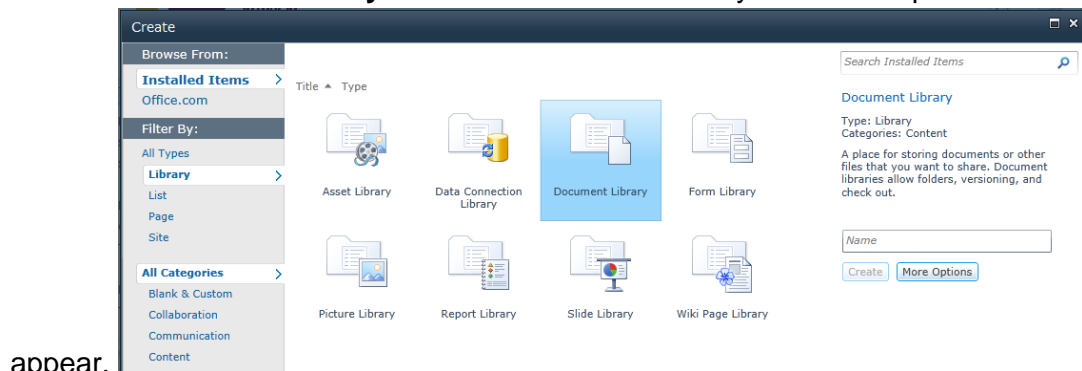
6. Click **OK**.

Create Lists and Libraries

Libraries

Create a Library

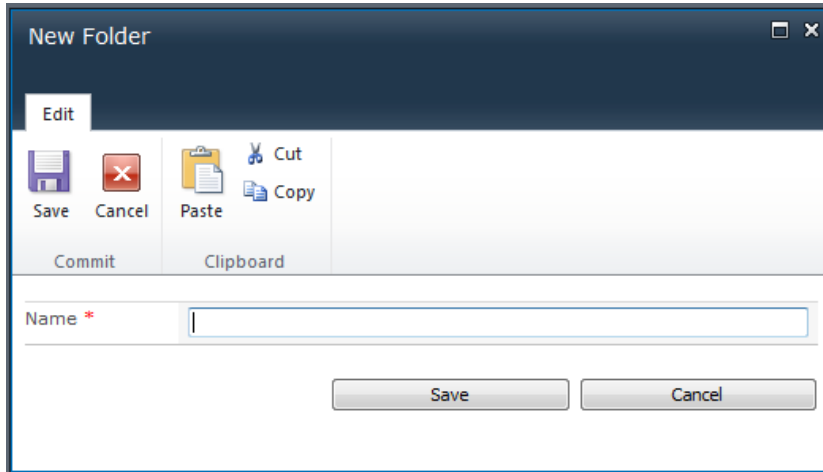
1. Navigate to the site where you want to add a library. The site's home page will open.
2. Click the **Site Actions** menu and select **More Options...** The Create dialog box will open.
3. Click the **Library** option in the **Filter By** section. The libraries will be displayed.
4. Click the **Document Library** icon. The Document Library information pane will



5. Enter a title for the new library in the Name field. This will appear in any list of libraries in SharePoint.
6. Click the **More Options** button. The **Advanced Document Library Create** dialog box page will appear.
7. Enter any notes about the new library in the Description field.
8. If you want to have a link to the list in your site's **Quick Launch**, leave the Navigation option set to **Yes**. This will allow faster navigation by including a link to the library on the left column of most pages.
9. Click the option to determine the tracking of a document's version history. This will track basic versions of documents placed in the library.
10. Select a default Document Template option.
11. Click **Create**. The new library will be created.

Create a New Folder in a Library

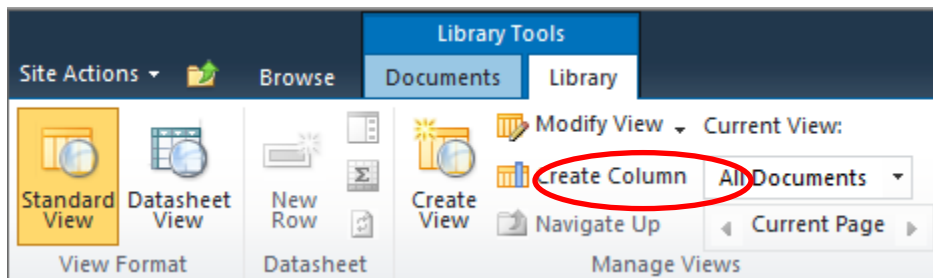
1. Navigate to the library where you want to add an item.
2. Click the **Documents** sub-tab in the **Library Tools** tab. The Documents tools ribbon will appear.
3. Click the **New Folder** button. The New Folder dialog box will open.



4. Type a label for the folder in the Name field.
5. Click **Save**. The folder will appear in the document library.

Create New Columns in a Library

1. Navigate to the library you want to modify.
2. In the **Library Tools** tab, click the **Library** sub-tab. The Library tools ribbon will open.
3. Click the **Create Column** button.



- a. The Create Column dialog box will open.
4. Enter a name for the new column in the Column name field.
 5. Specify the type of information that will be contained in the library column. This could include text; number and currency values; dates and times; or information already within your SharePoint site.
 6. Add notes for the column in the Description field. This will appear in the New and Edit Item pages to tell users what information is needed.
 7. Specify if the column is required to contain information. If it is required, the field will be denoted as such in the New and Edit Item pages.
 8. Depending on the type of information in the column, additional settings will be needed. Set them as desired.
 9. Click **OK**. The column will be added to the library.

Editing Existing Library Columns

1. Navigate to the library you want to edit.
2. In the **Library Tools** tab, click the **Library** sub-tab. The Library Tools ribbon will open.
3. Click the **Library Settings** button. The Document Library Settings page will open.
4. In the **Columns** section, click on the name of the column you want to edit. The Change Column page will open.
5. Enter or add the information you want to change in the appropriate field.
6. Click **OK**. The Document Library Settings page will open again and the changes will have been updated for the Column. Changes to the Column name field, type of information or whether the field is required will be reflected in the Columns section.

Delete Library Columns

1. Navigate to the library you want to edit.
2. In the **Library Tools** tab, click the **Library** sub-tab. The Library Tools ribbon will open.
3. Click the **Library Settings** button. The Library Settings page will open.
4. In the **Columns** section, click on the name of the title you want to remove. The Change Column page will open.
5. Click **Delete**. A confirmation dialog box will appear.
6. Click **OK**. The Document Library Settings page will open again, with the desired column removed from the Columns section.

Lists

Create a List

1. Navigate to the site where you want to add a custom list. The site's home page will open.
2. Click the **Site Actions** menu and select **More Options...** The Create dialog box will open.
3. Click the **Custom List** icon. The Custom List information pane will appear.
4. Enter a title for the new list in the Name field. This is used to identify the list throughout SharePoint.
5. Click **More Options**. The Advanced Custom List Create dialog box will appear.
6. Enter any notes about the new list in the Description field. This appears as a sub-heading when your list is open in SharePoint.
7. If you want to have a link to the list in your site's **Quick Launch** section, leave the Navigation option set to Yes.
8. Click **Create**. The new list will be created.

Add New List Columns

1. Navigate to the list you want to modify. The list page will open.
2. In the **List Tools** tab, click the **List** sub-tab. The List ribbon will open.
3. Click **Create Column**. The Create Column dialog box will open.
4. Enter a name for the new column in the Column name field.

5. Specify the type of information that will be contained in the list column. This could include text; number; currency values; dates and times; or information already within your SharePoint site.
6. Add notes for the column in the Description field. This will appear in the New and Edit Item pages to tell users what information is needed.
7. Specify if the column is required to contain information. If it is required, the field will be denoted as such in the New and Edit Item pages.
8. Depending on the type of information selected in Step 5 above, additional settings may be needed. Set them as desired.
9. Click **OK**. The column will be added to the list.

Edit Existing List Columns

1. Navigate to the list you want to edit. The list page will open.
2. In the **List Tools** tab, click the **List** sub-tab. The List tools ribbon will open.
3. Click the **List Settings** button. The List Settings page will open.
4. In the **Columns** section, click on the name of the title you want to edit. The Change Column page will open.
5. Enter or add the information you want to change about the column in the appropriate field.
6. Click **OK**. The List Settings page will open again, with the changes indicated in the **Columns** section.

Delete List Columns

1. Navigate to the list you want to edit. The List page will open.
2. In the **List Tools** tab, click the **List** sub-tab. The List tools ribbon will open.
3. Click the **List Settings** button. The List Settings page will open.
4. In the **Columns** section, click on the name of the field you want to remove. The Change Column page will open.
5. Near the bottom of the page, click **Delete**. A confirmation dialog box will open.
6. Click **OK**. The List Settings page will open again, with the column removed from the **Columns** section.