

Your easy, colorful,
SEE-HOW guide!



Plain & Simple

Microsoft SharePoint 2013



Johnathan Lightfoot, Michelle Lopez, and Scott Metker

Learn the simplest ways to get things done with Microsoft SharePoint 2013

See it.
Learn it.
In color.

microsoft.com/mspress

ISBN: 978-0-7356-6700-6



9 0000

U.S.A. \$29.99

Canada \$31.99

[Recommended]

Here's WHAT You'll Learn

- Create libraries for all kinds of media
- Share information in one location
- Organize people and processes
- Connect SharePoint to Microsoft Office with no fuss
- Find things fast with the Search Center
- Expand your community with social networking

Here's HOW You'll Learn It

- Jump in wherever you need answers
- Follow easy *steps* and *screenshots* to see exactly what to do
- Get handy *tips* for new techniques and shortcuts
- Use *Try This!* exercises to apply what you learn right away

Microsoft Office/Microsoft SharePoint





Microsoft

SharePoint 2013 Plain & Simple

Johnathan Lightfoot
Michelle Lopez
Scott Metker

Copyright © 2013 by Johnathan Lightfoot, Michelle Lopez, Scott Metker

All rights reserved. No part of the contents of this book may be reproduced or transmitted in any form or by any means without the written permission of the publisher.

ISBN: 978-0-7356-6700-6

1 2 3 4 5 6 7 8 9 TI 8 7 6 5 4 3

Printed and bound in Canada.

Microsoft Press books are available through booksellers and distributors worldwide. If you need support related to this book, email Microsoft Press Book Support at mspinput@microsoft.com. Please tell us what you think of this book at <http://www.microsoft.com/learning/booksurvey>.

Microsoft and the trademarks listed at <http://www.microsoft.com/about/legal/en/us/IntellectualProperty/Trademarks/EN-US.aspx> are trademarks of the Microsoft group of companies. All other marks are property of their respective owners.

The example companies, organizations, products, domain names, email addresses, logos, people, places, and events depicted herein are fictitious. No association with any real company, organization, product, domain name, email address, logo, person, place, or event is intended or should be inferred.

This book expresses the author's views and opinions. The information contained in this book is provided without any express, statutory, or implied warranties. Neither the authors, Microsoft Corporation, nor its resellers, or distributors will be held liable for any damages caused or alleged to be caused either directly or indirectly by this book.

Acquisitions and Developmental Editor: Kenyon Brown

Production Editor: Holly Bauer

Technical Reviewer: Marlene Lanphier

Copyeditor: Bob Russell, Octal Publishing, Inc.

Editorial Production: Rich Kershner, Box Twelve Communications

Indexer: Ellen Troutman Zaig

Cover Design: Twist Creative • Seattle

Cover Composition: Karen Montgomery

Illustrator: S4Carlisle Publishing Services

*This book is dedicated to my daughter, Giavrielle Sarahannah Lightfoot.
Do know that this book and all that I do I do for you.*

—Johnathan Lightfoot

*This book is dedicated to my three beloved blessings, Landon, Gabriella, and Daniella.
No more drawing pictures of Mommy with her laptop!*

—Michelle Lopez

*This book is dedicated to my family, Shannon, Zoe, and Cole. It might not seem as if I'm
thinking of you when I am up to my elbows in code, but I am. I always am.*

—Scott Metker

Contents

Acknowledgments	xv
-----------------------	----

1

About this book	1
What do you want to do today?	2
Written in plain English	2
Just essential tasks.....	3
A quick overview	3
Who this book is meant for	8
A few assumptions	8
Adapting task procedures for touchscreens.....	9
A final word (or two)	9

2

What's new and improved in SharePoint 2013	11
Creating a new site.....	12
Customizing the interface.....	14
Using the Office Store	16
Creating an asset library	18
Adding a thumbnail to a video	20
Using SkyDrive Pro.....	22

Using the timeline feature for tasks	23
Mentioning a colleague feature	24
Expanding My Tasks settings	26
Previewing search documents	28
Using the Community Site template	29
Creating badges	31
Creating an eDiscovery Center	32
Using Visual Designer for workflows within SharePoint Designer	34

3

Getting started with SharePoint sites 35

Understanding sites	36
Creating a SharePoint site from a template	40
Locating content on a site	44
Changing your site's title, description, and logo	45
Changing the look and feel of a site	47
Changing the navigation tree view settings	49
Editing the Quick Launch bar on a nonpublishing site	50
Editing the Top Link bar on a nonpublishing site	52
Editing publishing site navigation	53
Saving a site as a template	55

4

Organizing and managing information 57

Browsing through site columns	62
Creating site columns	64

Browsing through content types	66
Creating a new content type	68
Associating document templates with content types.	70

5	List and library essentials	73
	Using your apps	74
	Creating and deleting lists	76
	Adding and editing list items	78
	Deleting and restoring list items	80
	Creating list columns	82
	Editing and deleting list columns.	84
	Using list and column validation rules	86
	Sorting and filtering lists.	88
	Creating and selecting a list view.	90
	Sorting or filtering a list view	92
	Organizing items by using folders.	94

6	Working with documents.	95
	Managing documents with a document library	96
	Customizing document templates.	98
	Uploading multiple documents	100
	Requiring and displaying document check out.	102
	Checking documents in and out	104
	Configuring documents with document IDs	106
	Using document IDs.	108

Moving documents	110
Copying or sharing documents	112
Configuring document sets on a site	114
Configuring document sets on a document library	116

7

Working with media 119

Introducing the Asset Library app	120
Uploading and tagging media files	122
Tagging media files	126
Organizing by using keywords and metadata	129
Working with video files	130
Using SharePoint assets in Microsoft Office	138
Adding media to a SharePoint page	140

8

Using SkyDrive Pro 145

Accessing your SkyDrive Pro account	147
Saving files to SkyDrive Pro	148
Saving files to be accessible only to you	150
Sharing SkyDrive Pro files	152
Following SkyDrive Pro documents	155
Locating followed documents by using the newsfeed	156
Locating followed documents by using SkyDrive Pro	157
Synchronizing SkyDrive Pro to your local computer	158
Discontinuing sync between SkyDrive Pro and your local device	160

9

Using information management policies..... 163

Accessing site content type information management policies	166
Accessing list information management policies	167
Creating content type retention policies on a library.....	168
Setting library or folder-based retention schedules.....	170
Creating auditing policies	172
Viewing an audit report	174

10

Organizing people and work..... 177

Creating a project schedule by using a tasks list.....	178
Adding tasks	180
Viewing tasks in a Gantt Chart.....	182
Adding multiple tasks and subtasks	184
Creating a calendar list	186
Scheduling events on the calendar	188
Using the issue tracking list.....	190
Creating a discussion board	192
Participating in a discussion	194
Rating discussions.....	196
Connecting a discussion to Microsoft Outlook	197
Synchronizing project tasks with Microsoft Project	198

11

Using Web Parts 201

Adding Web Parts to a wiki page 208

Adding Web Parts to a Web Part page.....210

Adding an App Part to a page..... 212

Editing Web Part properties.....214

Working with personalized Web Parts on pages216

Targeting Web Parts for an audience219

12

Using SharePoint with Office 2013 223

Connecting SharePoint libraries to Office224

Connecting SharePoint calendars to Outlook..... 225

Archiving Outlook email in SharePoint..... 227

Importing a spreadsheet into SharePoint..... 229

Exporting data from a SharePoint list to Excel232

Exporting an Excel table to SharePoint.....233

Connecting Access and SharePoint.....235

13

Collaborating with blogs 237

Creating a blog site239

Changing your blog picture242

Changing your blog description 244

Using categories to organize your blogs245

Managing blog posts	247
Managing blog comments	249
Subscribing to a blog's RSS Feed	251
Using desktop blogging tools to publish blog posts	252

14	Security within SharePoint 2013	253
	Understanding SharePoint security	254
	Adding people to groups	256
	Creating groups	258
	Granting permissions to an individual.	260
	Breaking permission inheritance	262
	Granting access to lists, libraries, and individual items.	264
	Removing security	268
	Editing permissions	271
	Checking permissions	272

15	Using personal sites and social networking.	275
	Introducing My Site	276
	Editing your user profile	277
	Uploading content	278
	Following people	280
	Searching for people to follow.	282
	Updating your status	284
	Using your note board.	286
	Using tags	288

Using mentions.....	290
Using tasks.....	292
Customizing tasks views.....	294

16

Searching for information 297

Creating a Search Center.....	302
Searching from a Search Center.....	304
Preparing your site for search.....	312
Searching site content.....	314
Using search refinement.....	316
Previewing search results in Search Center.....	318
Using advanced search.....	320
Working with search alerts.....	322
Setting your search preferences.....	326
Promoting search results.....	328
Excluding site content.....	330
Excluding document libraries and lists from search.....	332
Excluding site columns from search.....	334
Maintaining search configurations.....	336

17

Community portals and sites..... 339

Creating a community site site collection.....	343
Creating a community site subsite.....	345
Adding moderators to community sites.....	347
Adding users to community sites.....	349

Managing your community settings	351
Working with categories	352
Working with badges	354
Assigning badges to members	356
Enabling site-wide reputation tracking	358
Viewing badges and reputation scores for a member	360
Creating and editing discussions	362
Replying to a discussion	365
Searching for discussions	366
Tracking discussions in progress	368
Managing replies	370
Moderating discussions	372
Reviewing posts submitted for moderation	374

18

Automating tasks with workflows	377
Associating workflows with lists	380
Associating workflows with content types	382
Starting workflows on documents	384
Checking the status of a running workflow	385
Creating a list workflow in SharePoint Designer	386
Editing workflows	388
Introducing Microsoft Visio integration with SharePoint workflows	389
Switching to the visual designer	390
Creating workflows in Visio 2013	391
Importing Visio workflows into SharePoint Designer	392

19

SharePoint and eDiscovery	395
Creating an eDiscovery Center.....	398
Working with eDiscovery cases	400
Identifying and holding content	403
Removing an eDiscovery hold	405
Accessing deleted content under legal hold	406
Creating an eDiscovery query	408
Exporting eDiscovery results	410
Index.....	413

Acknowledgments

So many thanks go to Microsoft Press and O'Reilly Media for giving us the opportunity to write this book for you and taking us on this journey. Writing a book requires the assistance and experience of a lot of people. Specifically, thanks so much to our wonderful editor, Kenyon Brown, our brilliant technical reviewer, Marlene Lanphier, our witty copyeditor, Bob Russell of Octal Publishing, Inc., the talented illustrators at S4Carlisle Publishing Services, and our stellar production editor, Holly Bauer, for being so patient and helpful throughout the entire process.

Thank you to GP Strategies, specifically Scott Greenberg, Douglas Sharp, Don Duquette, Bill Finnegan, and Deborah Ung for being so supportive throughout the entire process of getting the book completed.

From Johnathan Lightfoot

First and foremost I want to thank God for the blessings that have been given to me and my family.

A *really* big thank you to my wife, Genevieve—thank you for the encouragement during the long nights and weekends it took to get this book completed. Without your sacrifices, commitment, and dedication, I could not have finished this wonderful journey.

Thanks go out to my coauthors, Michelle and Scott: your encouragement and work toward the book was outstanding. I am really glad to have had the chance to work with the two of you. Also, thank you to Cary Walker III and Yvonne Sletmoe Wilson over at GP Strategies for your encouragement and listening to my SharePoint ramblings every month. A special thank you to Dux Raymond Sy for giving so much of yourself to the SharePoint Community and for always being a great sounding board to my crazy ideas! And, a big thank you Microsoft's SharePoint Development team for making such a terrific platform to work with and write about.

Finally, I would like to thank Karen Kocher and Karla Shores for asking about Community Portals and Sites.

From Michelle Lopez

A huge acknowledgment goes out to my husband, Carlos, for always bringing humor to my long days. Thank you for not giving me too much grief for neglecting you and our beautiful family during this amazing endeavor. To my parents, Dwight and Johnette Phillips, whom I love to make proud; to my sister, Noelle Phillips, who gets me like no one else does; and to my children, who continue to inspire me to make the world a better place. Thank you to Johnathan Lightfoot, for believing in me as much as I believe in me. Thank you to Scott Metker for sharing his dedication and resolve with me, even when in Paris!

I'd also like to thank you, our reader, for choosing this book. I hope you begin, or continue, your journey to become as addicted to SharePoint as I am.

From Scott Metker

I would first like to thank my coauthors, Johnathan Lightfoot and Michelle Lopez, for their assistance in writing this book. It truly was a team effort, and I thank you both for the help.

I would like to thank Mike Yamarik, who has been both personally and professionally supportive throughout my career. Additionally, I would like to thank Gabor Fari for his encouragement and countless introductions to other members of the SharePoint community.

Finally, I would like to thank my wife, Shannon, who has been my partner and supporter for all of my projects. You have made these things possible for us, and I will always support you in the same way.

List and library essentials

Organizations rely on accessing pertinent information so they can respond quickly to business needs. Microsoft SharePoint 2013 offers true document-management capabilities and is all about sharing information through apps called lists or libraries.

A list is a collection of like items, such as contact information, calendar events, or inventory items. Similar to a database table, each list contains data that you enter yourself or import from another source. You control how the information is displayed and who has access to either view or manipulate that data. SharePoint provides a central location for team members to access current, accurate, and relevant data.

You can create a custom list that describes the information that you want to capture, or use standard templates that come out of the box. SharePoint 2013 comes with several lists for collecting different kinds of information, such as tasks, announcements, contacts, and links, just to name a few.

5

In this section:

- Using your apps
- Creating and deleting lists
- Adding and editing list items
- Deleting and restoring list items
- Creating list columns
- Editing and deleting list columns
- Using list and column validation rules
- Sorting and filtering lists
- Creating and selecting a list view
- Sorting or filtering a list view
- Organizing items by using folders

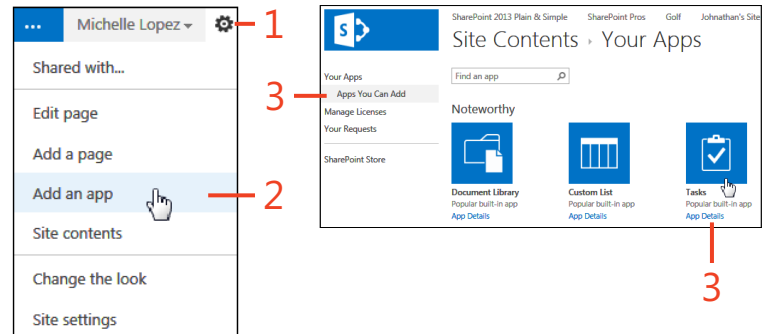
Using your apps

Microsoft has included a new application development model in SharePoint 2013 called the *SharePoint app*. Certainly, we've all become familiar with the phrase, "There's an app for that." Well, now SharePoint can say the same. These self-contained web applications can come out of the box or be downloaded from Microsoft's SharePoint Store. Apps provide users with a way to access existing applications that others have already built rather than building them from scratch. Lists and libraries are apps as well as being other useful mini programs.

Perhaps you want to highlight a "Tip of the Day" section on your SharePoint site or implement a Timesheet in which employees can enter their project hours. You can download these apps from the SharePoint Store for free instead of hiring a developer to design and implement it!

Add an app on SharePoint

- 1 In the upper-right corner of the window, click the Settings icon (the small gear graphic).
- 2 On the menu that appears, click Add An App.
- 3 Click the app that you want to add to your site.
- 4 Enter a name for the new app.
- 5 Click Create.



TIP You can read a brief description of each app by clicking the App Details link, which is located below the app's icon, on the Apps You Can Add page.

Add an app from the SharePoint Store

- 1 In the upper-right corner of the window, click the Settings icon.
- 2 On the menu that appears, click Add An App.
- 3 On the Your Apps page, on the Quick Launch bar, click SharePoint Store.
- 4 Click the app that you want to add to your site.
- 5 Click Add It, Buy It, or Try It.
- 6 If the app requests trust confirmation, follow any instructions that are presented and then click either Trust It or Cancel.

The image illustrates the process of adding an app from the SharePoint Store through six numbered steps:

- Step 1:** A settings menu is open in the top right corner of the window, with the 'Add an app' option highlighted.
- Step 2:** The 'Add an app' option is selected, and the 'SharePoint Store' link is highlighted in the 'Your Apps' page.
- Step 3:** The 'SharePoint Store' page is shown with various app categories and featured apps like 'Exam Maker' and 'CertiViz'.
- Step 4:** The 'Exam Maker' app is selected, showing its details including price (\$1.49) and an 'ADD IT' button.
- Step 5:** The 'BUY IT' button is highlighted.
- Step 6:** A trust confirmation dialog box is shown with 'Trust It' and 'Cancel' buttons.



TIP You must be a Site Owner or have Full Control permissions to add apps from either the SharePoint Store or an App Catalog.

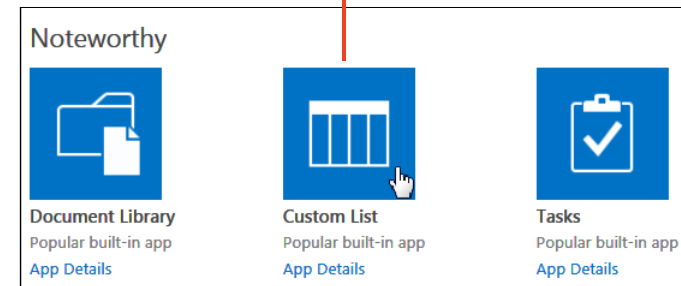
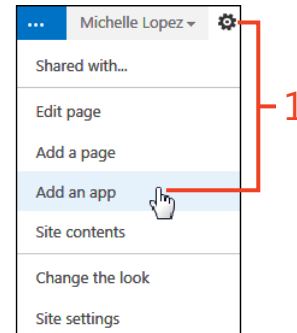
Creating and deleting lists


Although SharePoint 2013 provides you with several lists and libraries based on commonly used templates, you'll likely need to customize your list to suit your needs. Perhaps you need a way


to display employee vacations or track open issues—SharePoint makes this possible with just a few clicks. To keep your site clean, you'll want to get rid of unused or obsolete lists, as well.

Create a list or library

- 1 In the upper-right corner of the window, click the Settings icon, and then, on the menu that appears, click Add An App.
- 2 On the Your Apps page, under the Noteworthy section, select either Document Library or Custom List. For this example, the Custom List app is used.
- 3 In the Adding Custom List dialog box, enter a name for your list (or library).
- 4 Click Create.

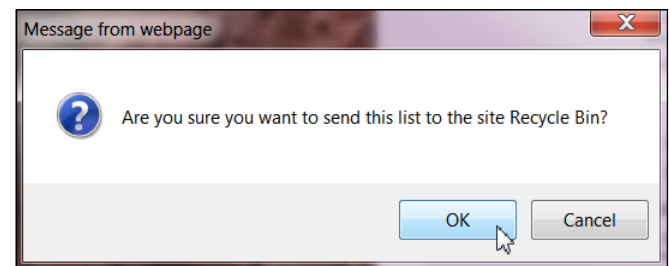
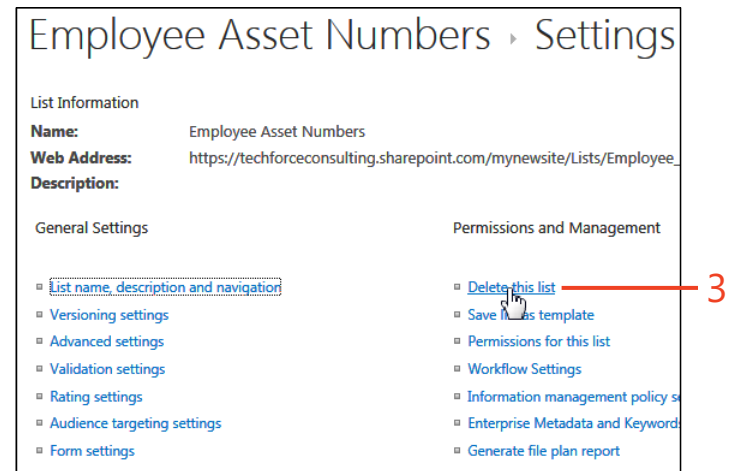
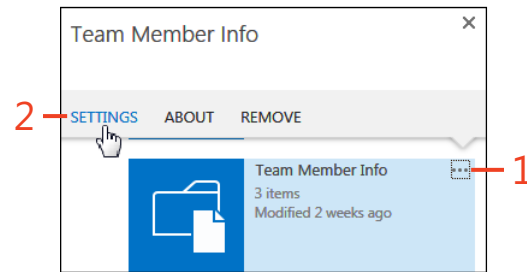


 **TIP** A library is actually a list that stores documents instead of information alone.

 **TIP** When naming your list, use underscores (_) in place of spaces between words or omit spaces between words altogether. This helps to keep the assigned URL clean. If you want to rename your list after you create it, go to the List Settings and then, in the General Settings section, click List Name, Description And Navigation. There, you can edit the name of your list to include spaces.

Delete a list or library

- 1 Hover over the list or library that you want to delete and then click the drop-down menu icon (...).
- 2 On the menu that appears, click the Settings link.
- 3 On the Settings page, under the Permissions And Management section, click Delete This List (or Delete This Library).
- 4 In the pop-up message box, click OK to confirm that you want to send the list to the Recycle Bin.



TRY THIS Practice creating a custom list titled New List and then delete it.

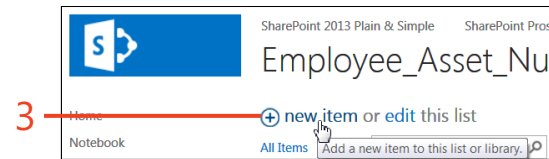
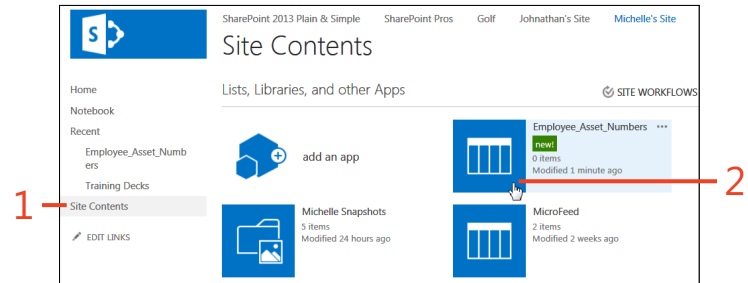
Adding and editing list items

After creating a list, you'll want to populate that list with the information for which it was designed. Each row in your SharePoint 2013 list is called a *list item*. SharePoint can support up to 30 million items in one SharePoint list! Depending on your permission level, you can create, edit, and delete items.

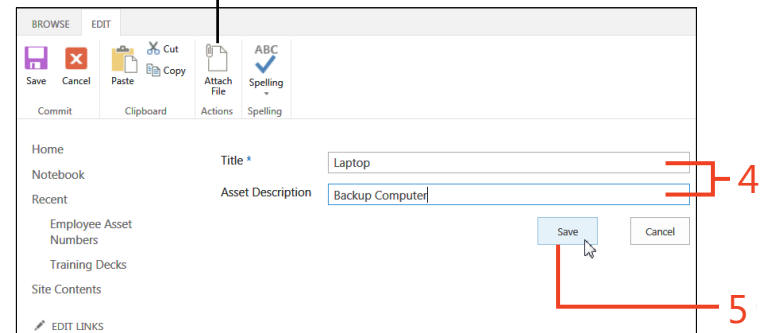
Add a list item

- 1 On the Quick Launch bar, click Site Contents.
- 2 On the Site Contents page, click the list to which you want to add items.
- 3 In the list, click New Item.
- 4 On the list's Edit page, click with the mouse or use the Tab key to move through the item fields, entering data as required or as you see fit.
- 5 Click Save.

You can also attach documents or items to a list item. For instance, it would be practical to attach a menu to a restaurant list or an agenda to a calendar item. By default, SharePoint supports including attachments to list items; however, you can turn off this feature on the Settings page for the list, if you'd like.



Try this



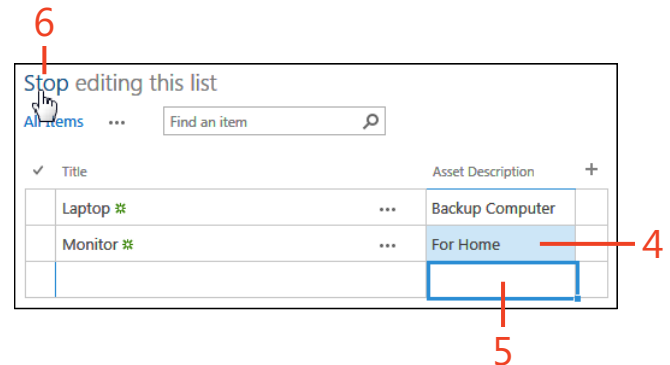
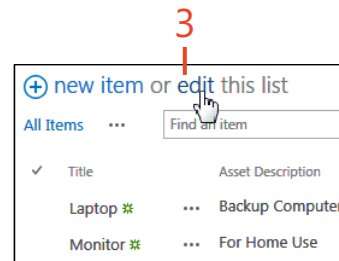
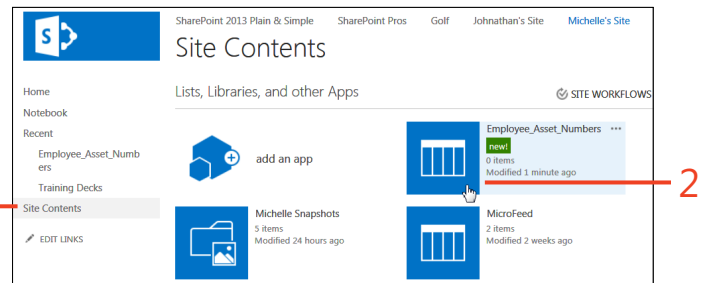
TIP SharePoint automatically assigns a sequential ID number to each new item, eliminating the need for you to assign it manually.



TIP A blue asterisk indicates a required field for which you must provide information before the list item can be saved.

Edit a list item

- 1 On the Quick Launch bar, click Site Contents.
- 2 Click the list in which you want to edit items.
- 3 Click Edit above the list items.
- 4 Click the mouse or use the Tab key to navigate between and edit the item fields.
- 5 Click the mouse or use the Tab key to select a different field; the changes are automatically saved.
- 6 When you're done making changes, click Stop above the list items.



TRY THIS Attach a file to your item by going on the ribbon and clicking Attach File.



TIP Most drop-down commands are also available on the ribbon on the Items tab.

Deleting and restoring list items

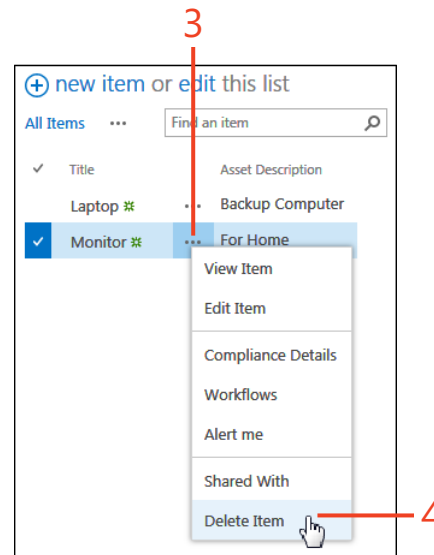
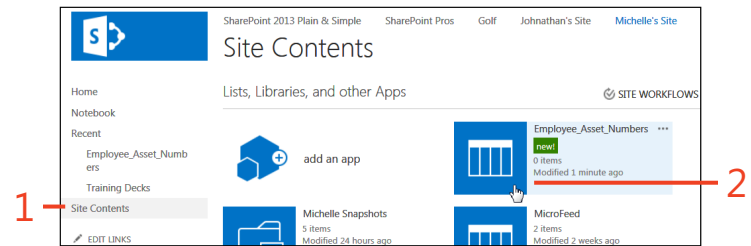
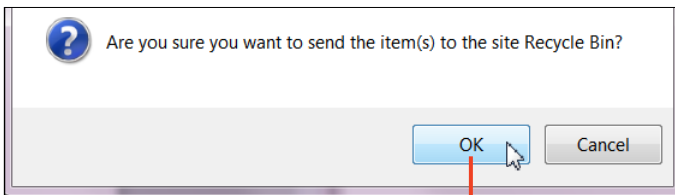
It's possible that a user will want to retrieve a deleted item. SharePoint 2013 provides an easy way to restore that deleted item back to its original location.

Deleted items will remain in the site collection's Recycle Bin for 30 days. If you delete an item from your Recycle Bin, you can

request that your Site Collection Administrator restore the item back to its original location for you, as long as the item hasn't exceeded 30 days from the original deletion date.

Delete a list item

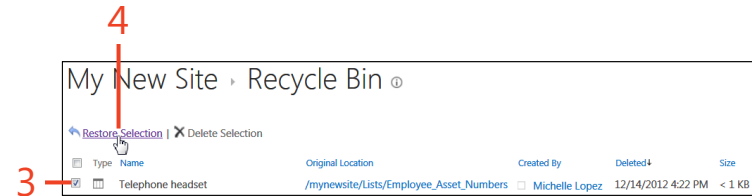
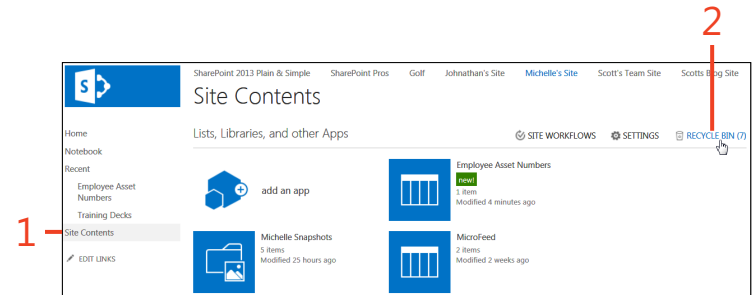
- 1 On the Quick Launch bar, click Site Contents.
- 2 Click the list from which you want to delete items.
- 3 Hover over the item that you want to delete and then click the menu drop-down icon (...).
- 4 On the menu that appears, click Delete Item.
- 5 In the pop-up message box, click OK to confirm that you want to send the item to the Recycle Bin.



TRY THIS Delete multiple items by using the Edit command and highlighting multiple rows with your mouse. Then, click Delete.

Restore a deleted item

- 1 On the Quick Launch bar, click Site Contents.
- 2 On the right side of the Site Contents page, click Recycle Bin.
- 3 On the Recycle Bin page, select the check box to the left of the item that you want to restore.
- 4 Click Restore Selection.



TRY THIS Delete a list or library and then restore it.

Creating list columns

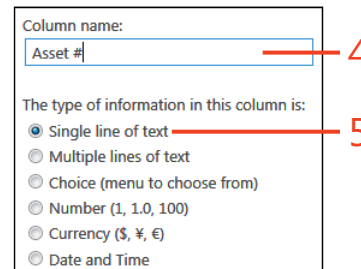
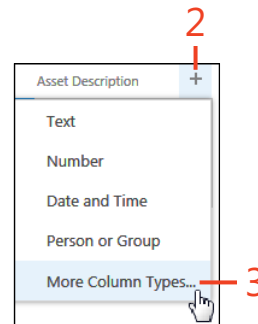
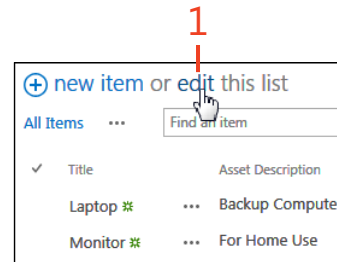
SharePoint 2013 provides several templates for common list types, such as Announcements, Calendar, Contacts, and Tasks. These templates can be used and then customized so that you

don't have to create a new list from scratch. Create additional columns to suit your list or library's purpose.

Create a column

- 1 In a list, above the list items, click Edit.
- 2 To the right of the column headings, click the Add button (the "+" sign).
- 3 On the menu that appears, click More Column Types.
- 4 In the Column Name text box, enter a name for the column.
- 5 Choose the type of information that the new column will store.

(continued on next page)



TIP To work with columns, you must have Designer or Full Control permissions.



TRY THIS SharePoint includes several predefined columns. Instead of creating a new column, choose to add from existing site columns when editing list column settings.

Create a column *(continued)*

- 6 In the Additional Column Settings dialog box, you can also optionally edit the following column settings:
- **Description** What you enter here displays under the field when the user is editing the form.
 - **Require That This Column Contains Information** Select Yes to require data to be entered in this field.
 - **Enforce Unique Values** Select Yes to require that each value in this column be unique in this list.
 - **Maximum Number Of Characters** This determines the maximum number of characters that can be entered in this field.
 - **Default Value** Any text entered here will be the default column entry when a new item is created.
 - **Add To Default View** Select this check box to add this column to the default view of this list.
 - **Column Validation** Use rules to accept or reject information entered in this column based on defined criteria.
- 7 Click OK.

The screenshot shows the 'Additional Column Settings' dialog box. The 'Description' field is empty. Under 'Require that this column contains information:', the 'No' radio button is selected. Under 'Enforce unique values:', the 'No' radio button is selected. The 'Maximum number of characters' field contains '255'. Under 'Default value:', the 'Text' radio button is selected, and the field is empty. The 'Add to default view' checkbox is checked. A blue link for 'Column Validation' is visible. At the bottom right, there are 'OK' and 'Cancel' buttons. A red bracket labeled '6' encompasses the Description, Require that this column contains information, Enforce unique values, and Maximum number of characters sections. A red arrow labeled '7' points to the OK button.

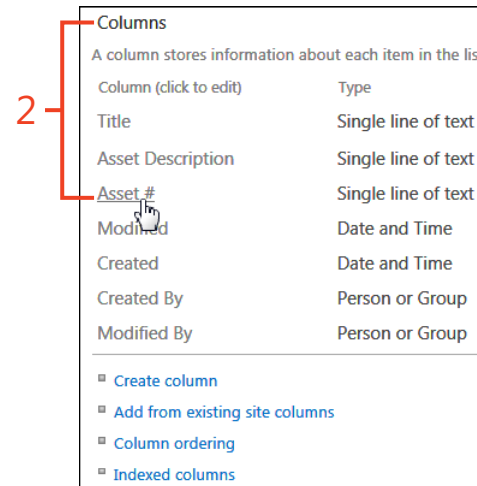
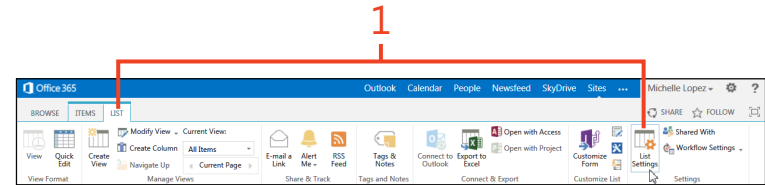
Editing and deleting list columns

After you've created new columns for your list or library in SharePoint 2013, you might change your mind about the column name or data type. You might want to require that

information is entered in a field or include a different default value. You can also delete columns that are no longer necessary.

Edit column settings

- 1 On the List tab, in the Settings group, click List Settings.
- 2 On the List Settings page, in the Columns section, click a column title.
- 3 Make the desired Column changes and click OK.

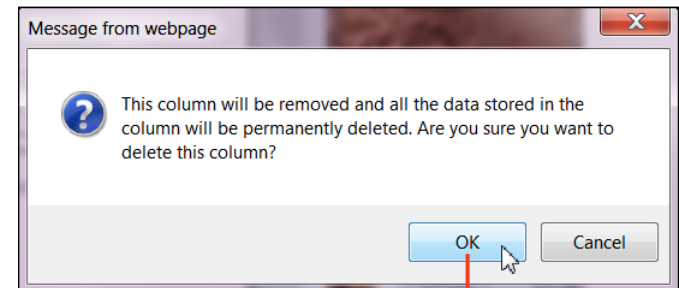
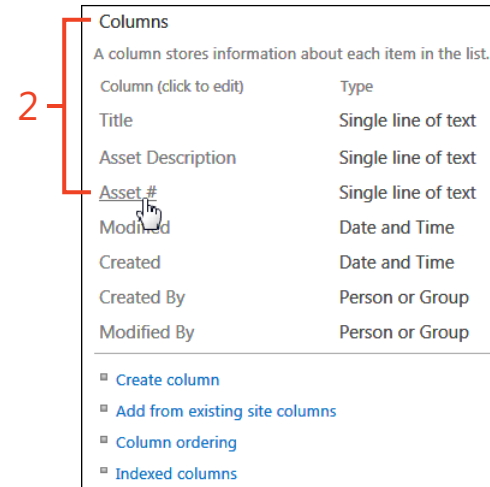
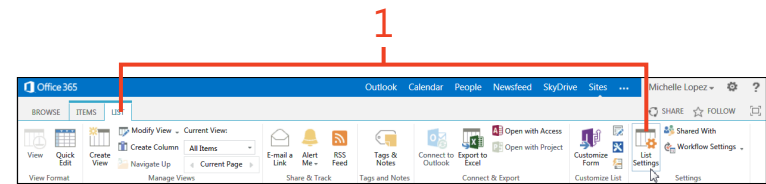


CAUTION If you change your mind about the Type for a column, you'll find that not all Types are available when you go back to edit it. In this case, your only alternative is to delete the column and create a new one with the correct Type.



Delete a list column

- 1 On the List tab, in the Settings group, click List Settings.
- 2 On the List Settings page, in the Columns section, click a column title.
- 3 Click Delete.
- 4 In the pop-up message box asking you to confirm the deletion, click OK.



4



TIP The Title column included in SharePoint lists is a required column, it cannot be deleted. If the Delete button is not displayed in the settings for the column, this indicates that the column is a required column in this list.



CAUTION Deleting a column also deletes the data in that column. Before deleting a column, consider exporting the list to Microsoft Excel to back up the information. This can be done by clicking Export To Excel in the Connect & Export group of the List's ribbon.

Using list and column validation rules

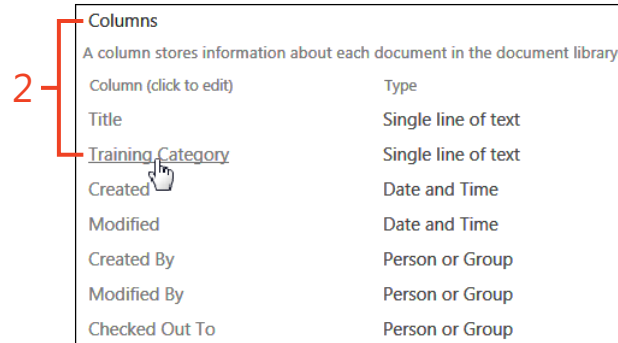
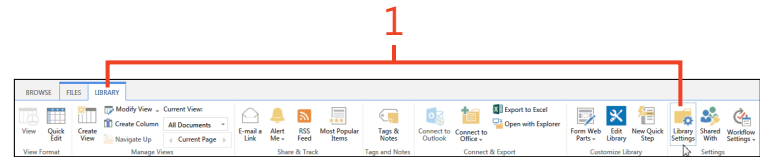
Being that we're human, entries are bound to contain formatting errors. A SharePoint 2013 feature uses validation rules to accept or reject the entered information based on defined criteria. Rejected information needs to be corrected by the user before the item can be saved in the list. Validation rules exist on individual columns as well as the list level. SharePoint evaluates column rules before evaluating list level rules.

Validation rules are only available on the following column types: Single Line Of Text, Choice, Number, Currency, and Date/Time.

Add a validation rule to a column

- 1 On the Library tab, in the Settings group, click Library Settings (or List Settings on the List tab).
- 2 On the Library Settings page, in the Columns section, click a column title.
- 3 Scroll down to Column Validation and click the plus sign (+) icon next to Column Validation to expand the section.

(continued on next page)



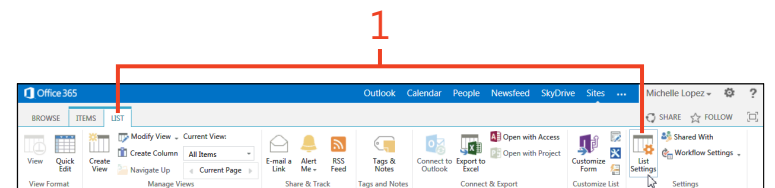
TIP For more information on column validation, click the SharePoint Help button (the question mark in the upper-right corner of a site) and then type **formula** as a search phrase.

Add a validation rule to a column *(continued)*

- 4 In the Formula text box, enter a validation formula.
- 5 In the User Message text box, enter a message to display if the information entered in the field is not valid.
- 6 Click OK.

Add a validation rule to a list

- 1 On the List tab, in the Settings group, click List Settings.
- 2 On the List Settings page, in the General Settings section, click Validation Settings.
- 3 In the Formula text box, enter a validation formula.
- 4 In the User Message text box, enter a message to display if the information entered in the field is not valid.
- 5 Click Save.



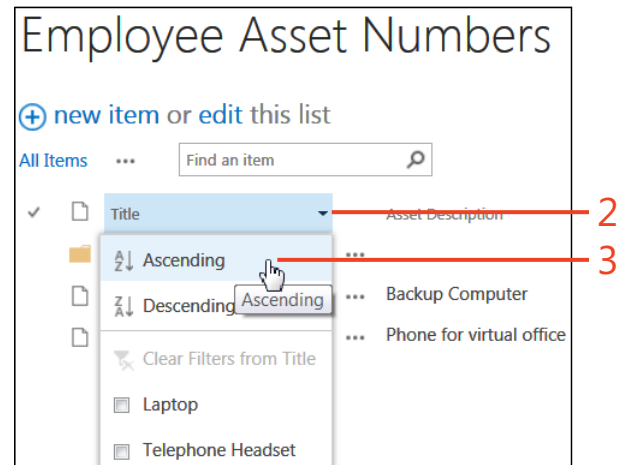
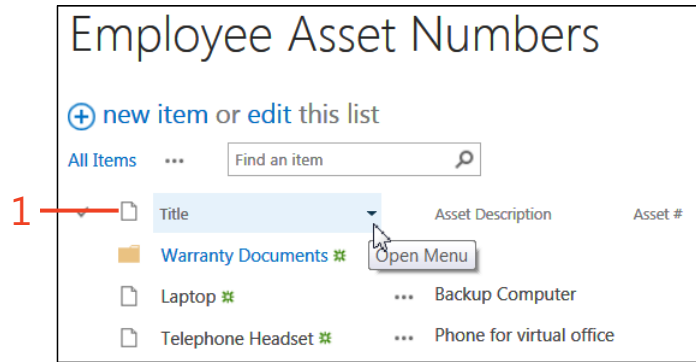
Sorting and filtering lists

Information in lists can be organized and displayed by using views. Views can be created and modified to specify which fields are displayed, the column order, how they are sorted, and whether the information is filtered and/or grouped. SharePoint 2013 provides several formats for displaying views, as well,

such as Standard and Datasheet views. Standard views support dynamic sorting and filtering directly in the column headers, whereas Datasheet views give users the option to enter data as a batch instead of entering one list item at a time. Here, you'll learn how to manually sort or filter a Standard view.

Sort a list

- 1 Hover your mouse pointer over the title of the column by which you want to sort.
- 2 Click the drop-down arrow to the right of the column title.
- 3 On the menu that appears, click either Ascending (A on Top) or Descending (Z on Top).



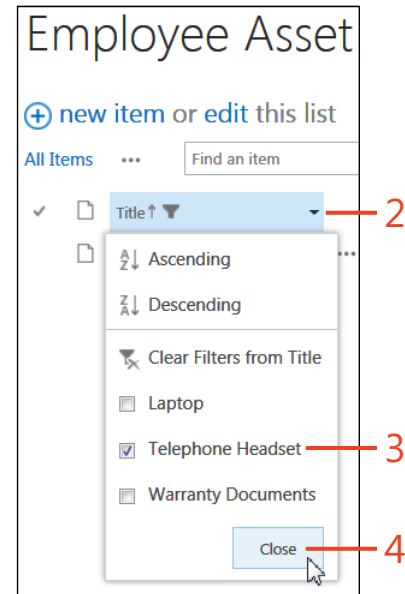
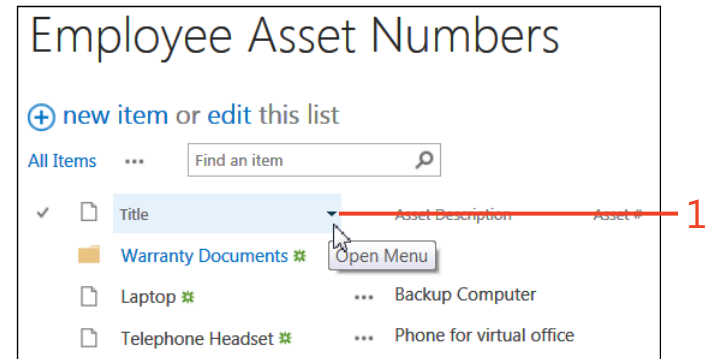
SEE ALSO To sort on more than one column, you need to configure a list view. See "Create a list view" on page 90.



TIP If a column is sorted, a small up arrow or down arrow (depending on whether the column is sorted in ascending or descending order) displays to the right of the column title.

Filter a list

- 1 Hover your mouse pointer over the title of the column that you want to filter.
- 2 Click the drop-down arrow to the right of the column title.
- 3 On the menu that appears, select the check boxes adjacent to the information that you want to include in the filter.
- 4 Click Close.



TIP If a column is filtered, a small funnel icon displays to the right of the column title.



TRY THIS Clear the column filters by clicking the small funnel icon and then, on the menu that appears, click Clear Filters From column.

Creating and selecting a list view

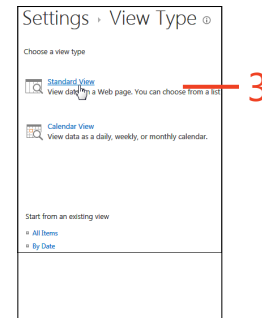
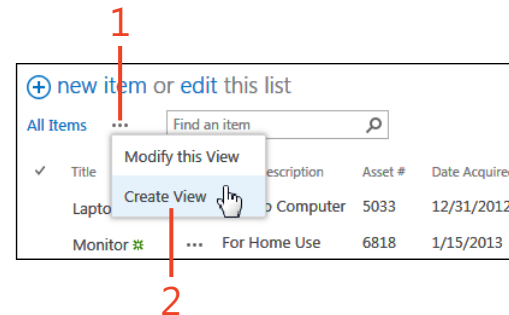
SharePoint 2013 provides users with flexible ways to display their list information by using views. You control which fields appear in each list, the field order, as well as filtering or sorting on multiple columns. Additionally, information can be grouped to collapse or expand for a tree-like view. Users can determine

whether their configured views are available to all users or just themselves, and can be defined for mobile devices. If a preferred view of the list data already exists but is not the default view, SharePoint 2013 makes it easy to switch to that view.

Create a list view

- 1 Click the drop-down menu icon (...) above the list headings.
- 2 On the menu that appears, click Create View.
- 3 On the View Type page, click Standard View.

(continued on next page)



TIP Only include relevant columns to reduce the amount of columns visible on your screen. All fields are visible when you click the link to the item.



TIP Instead of creating a new view from scratch, use the Start From An Existing View option when choosing to create a new view and make modifications.

Create a list view *(continued)*

- 4 On the Create View page, in the View Name text box, enter a unique name for the view.
- 5 Select the Make This The Default View check box to make this new view the default view.
- 6 In the View Audience section, choose to make the view Personal (for your use only) or Public (available to all site users).
- 7 In the Columns section, you can perform two activities:
 - Select the check box adjacent to the columns that you want to display in the view; clear the check boxes adjacent to the columns that you want to hide.
 - Order the columns sequentially from left to right by selecting numbers in the Position From Left column.
- 8 At the top or bottom of the page, click OK.

Settings > Create View

Name
Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

View Name:
By Status

Make this the default view (Applies to public views only)

Audience
Select the option that represents the intended audience for this view.

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.

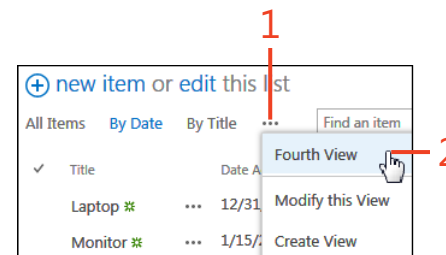
Columns
Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the Position from Left box.

Display	Column Name	Position from Left
<input type="checkbox"/>	Type (icon linked to document)	12
<input checked="" type="checkbox"/>	Title (linked to item with edit menu)	2
<input checked="" type="checkbox"/>	Asset Description	3
<input checked="" type="checkbox"/>	Asset ID	4
<input checked="" type="checkbox"/>	Status	5
<input type="checkbox"/>	App Created By	7
<input type="checkbox"/>	App Modified By	8
<input type="checkbox"/>	Attachments	9

OK Cancel

Select a list view

- 1 Click the drop-down menu icon (...) above the list headings.
- 2 On the menu that appears, click the view that you want to display.



TIP Three view links are available above the list's columns, available for quick toggling.

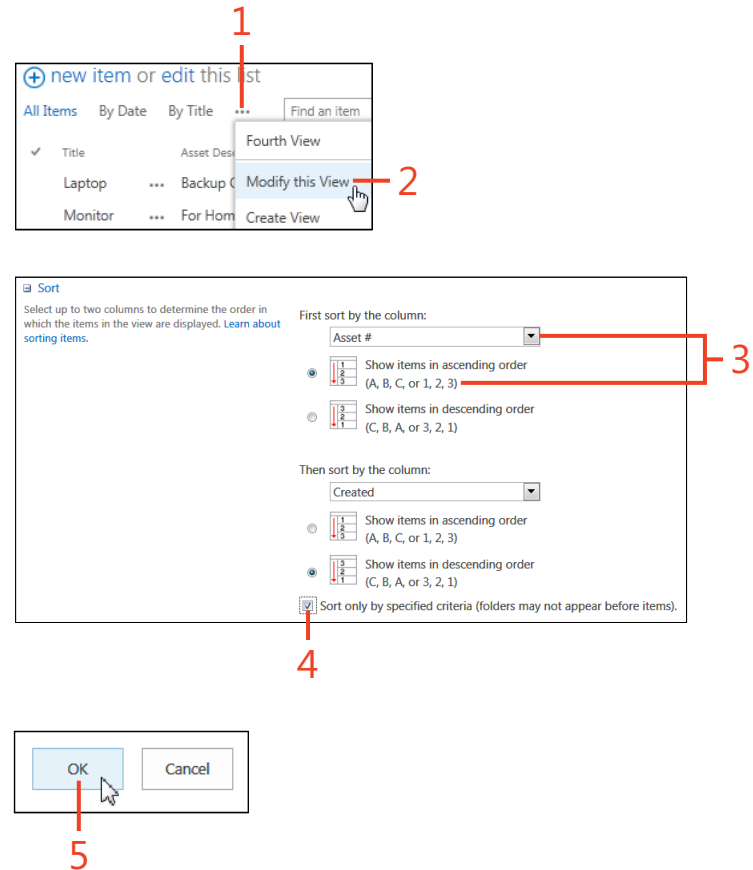
Sorting or filtering a list view

If you find yourself continuously filtering the default view to meet your needs, why not eliminate that time by creating

alternate views that you'll access often? Here, you'll learn how to modify views by using the sort and filter features.

Sort a list view

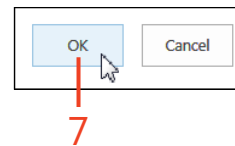
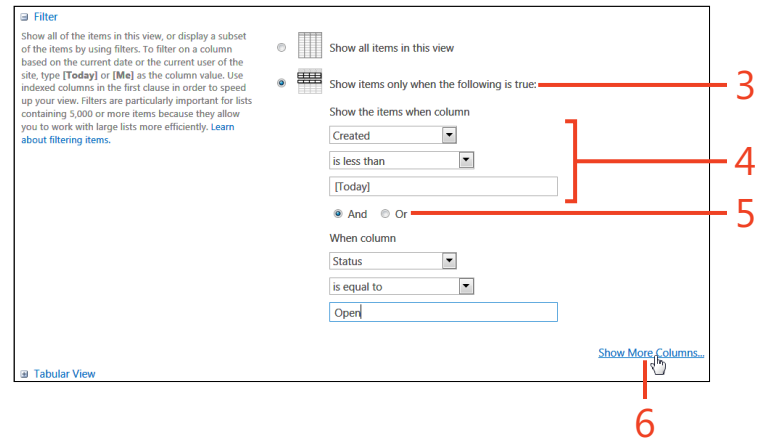
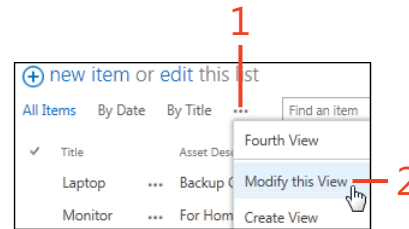
- 1 Click the drop-down menu icon (...) above the list headings.
- 2 On the menu that appears, click Modify This View.
- 3 In the Sort section, you can perform two activities:
 - Click the drop-down list and select the First Sort By The Column.
 - Select whether you want that sorted column in ascending or descending order.
- 4 If you don't want folders to appear before items, select the Sort Only By Specified Criteria check box.
- 5 At the top or bottom of the page, click OK.



TIP Folders will appear before list items by default. If the Sort Only By Specified Criteria option is selected, the folders will appear in the assigned sort order along with the items.

Filter a list view

- 1 Click the drop-down menu icon (...) above the list headings.
- 2 On the menu that appears, click Modify This View.
- 3 In the Filter section, click the Show Items Only When The Following Is True option.
- 4 To enter filter criteria, do the following:
 - Select a column on which to filter from the first drop-down menu.
 - Select a condition from the second drop-down menu.
 - Enter a value in the text box.
- 5 Select And or Or to enter additional filter criteria.
- 6 To filter on more than two criteria, click Show More Columns.
- 7 At the top or bottom of the page, click OK.



TRY THIS Filter on items by using the Created By criterion and then enter the value [Me].

Organizing items by using folders

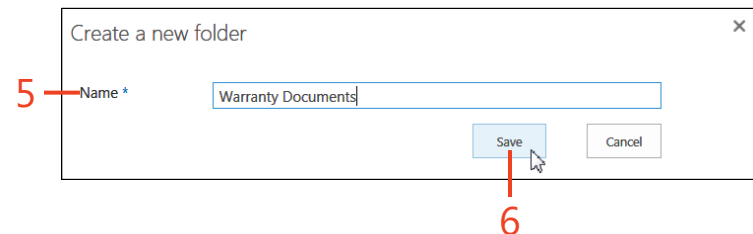
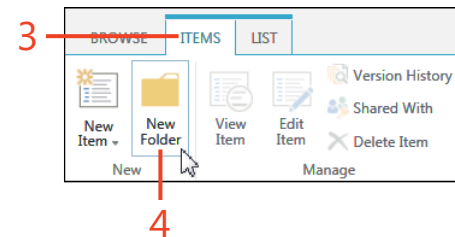
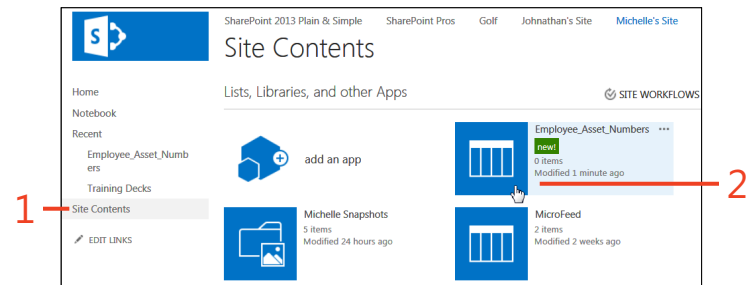
In SharePoint 2013, you can create folders to organize your lists, similar to creating folders on your computer. However, for the purposes of organizing information, adding a folder in a list can interrupt the display of the captured information.

You could use SharePoint to organize a Class Schedule listing different Classes, Class Times, and Costs to view at a glance. It

would be helpful to have a folder for Class Descriptions for this scenario. Preparing an efficient organizational strategy ahead of time to locate, process, and manage your information is always a best practice.

Create a folder

- 1 On the Quick Launch bar, click Site Contents.
- 2 On the Site Contents page, locate the list or library in which you want to create a folder.
- 3 On the ribbon, click the Items tab of a list, or the Files tab of a library.
- 4 Click New Folder.
- 5 In the Create A New Folder dialog box, enter a folder name.
- 6 Click Save.



TIP If the New Folder option isn't available, the feature needs to be turned on. On the Library Settings tab, click Advanced Settings and then, under the Folders section, click Yes.

Security within SharePoint 2013

Securing an organization's information is crucial. Protecting organizational content is a key component to the success of that security.

Microsoft SharePoint 2013 provides proficient security tools to ensure that teams are completely confident that their content is available only to the users to whom they've granted access. Using the SharePoint security model, you can apply access privileges at an overall level such as the site collection, down to an individual level like a single document—not to mention all the levels in between (sites, pages, or lists and libraries).

14

In this section:

- Understanding SharePoint security
- Adding people to groups
- Creating groups
- Granting permissions to an individual
- Breaking permission inheritance
- Granting access to lists, libraries, and individual items
- Removing security
- Checking permissions
- Editing permissions

Understanding SharePoint security

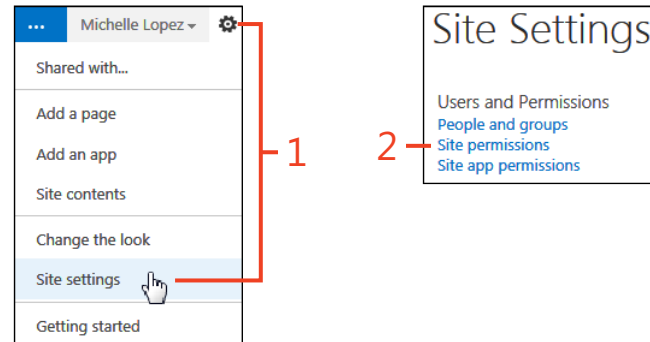
You can only access SharePoint 2013 if a SharePoint administrator or site owner grants you permission. You can grant permissions to groups of people or to individuals. SharePoint administrators can grant access to Active Directory groups, or Windows network groups, as well.

View site permissions

- 1 On the Home page, click the Settings button (the small gear icon next to the name of the logged-on user). On the menu that appears, click Site Settings.
- 2 On the Site Settings page, in the Users And Permissions section, click Site Permissions.

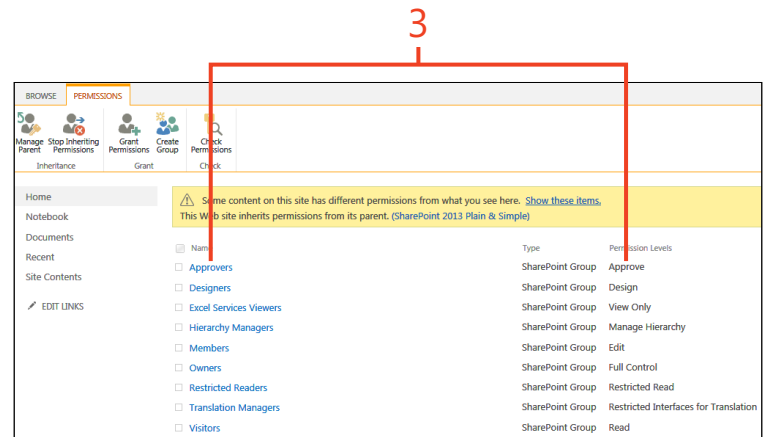
(continued on next page)

It is recommended to add individuals to SharePoint groups and then provide access to those groups, rather than directly to individuals. A SharePoint group is a collection of individuals (up to 5,000), and it is much more convenient to manage the applied security settings to a group than to manage individual users.



View site permissions *(continued)*

- On the Permissions page, view the permission levels assigned to each group on the site.



Adding people to groups

A new site can be created to use the same permissions as the parent site or to use unique permissions. Upon creation of a new site with unique permissions, SharePoint 2013 automatically creates three groups: Visitor, Member, and Owner. New groups can be created, and unused groups can be deleted.

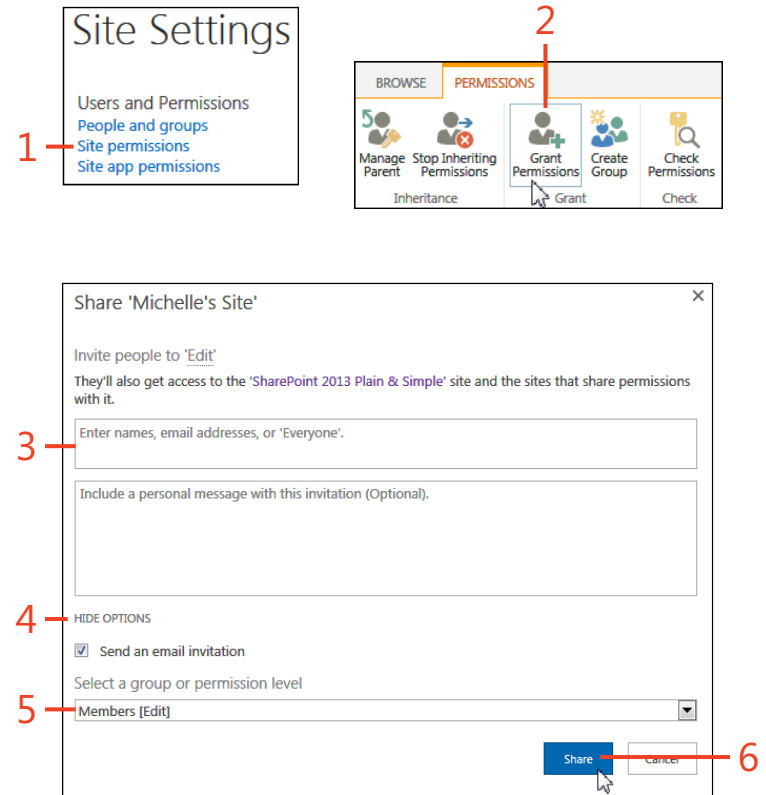
Permissions then need to be assigned to groups for them to actually be of use. SharePoint administrators can use permission levels to control what groups or individuals can do within SharePoint. Thirty-three selectable permissions can be mixed and matched in different combinations to define thousands of permission levels.

Permission levels determine what type of activities that group can perform on a site, page, list, library, item, or document. Upon creation of a new team site, SharePoint automatically creates seven permission levels:

Permission level	Definition
Full Control	Users have full control of a site to add, delete, approve, move, and create new sites.
Design	Users can view, add, delete, approve, and customize a SharePoint site.
Edit	Users can add, edit, and delete lists. They can also view, add, update, and delete list items and documents.
Contribute	Users can view, add, update, and delete list items and documents.
Read	Users can view pages and list items. They can also can download document copies.
Limited Access	User can view specific lists, document libraries, list items, folders, or documents when given permission.
View Only	Similar to the Read permission level, but users cannot download items.

Add people to existing groups

- 1 On the Site Settings page, in the Users And Permissions section, click Site Permissions.
- 2 On the Permissions page, click the Permissions tab and then, in the Grant group, click Grant Permissions.
- 3 In the Share dialog box, in the designated text box, enter names, email addresses, or the word "Everyone".
- 4 Click the Hide Options button.
- 5 In the Select A Group Or Permission Level list box, select a group name.
- 6 Click Share.



TRY THIS Add yourself to the Members group.

Creating groups

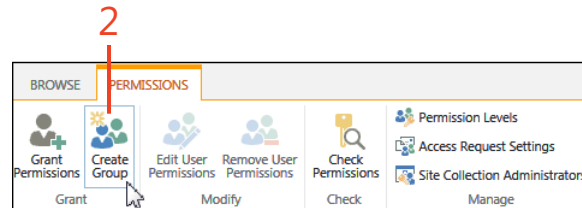
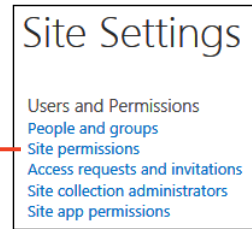
Customizing SharePoint groups makes it possible for your organization to effectively grant access to only the users it specifies.

Create a group

- 1 On the Site Settings page, in the Users And Permissions section, click Site Permissions.
- 2 On the Permissions page, click the Permissions tab and then, in the Grant group, click Create Group.

(continued on next page)

When you create a group, you can name it, assign it a permission level, and add people to it.



TIP When necessary, you can assign an existing group as the group owner to allow more than one person to be the group owner.

Create a group *(continued)*

- 3 On the Create Group page, in the Name text box, enter a name for the group.
- 4 In the About Me text box, enter a description.
- 5 Assign a group owner to the group.
- 6 In the Give Group Permission To This Site section, select a check box corresponding to the permission level that you want to assign to the group.
- 7 Click Create.

Name: Team Directors

About Me:

Group owner: SharePoint Team

Choose the permission level group members get on this site

- Full Control - Has full control.
- Design - Can view, add, update, delete, approve, and delete lists and items.
- Edit - Can add, edit and delete lists; can view, add, and delete items.
- Contribute - Can view, add, update, and delete lists and items.

Create Cancel

Granting permissions to an individual

By assigning people to SharePoint 2013 groups, you can see what permissions an individual has and assign those same permissions to someone else simply by adding that person to the

same group. Occasionally, however, you might need to assign permissions directly to a user to grant access to a site or its individual items.

Grant permissions to an individual

- 1 On the Site Settings page, in the Users And Permissions section, click Site Permissions.
- 2 On the Permissions tab, in the Grant group, click Grant Permissions.
(continued on next page)



TIP It is considered a best practice to manage users within groups instead of individually.

Grant permissions to an individual *(continued)*

- 3 In the Share dialog box, in the designated text box, enter names, email addresses, or the word "Everyone".
- 4 Click the Show Options button.
- 5 In the Select A Group Or Permission Level list box, select a permission level.
- 6 Click Share.

Invite people to "Contribute"

Enter names, email addresses, or 'Everyone'.

Include a personal message with this invitation (Optional).

HIDE OPTIONS

Send an email invitation

Select a group or permission level

Contribute

Share Cancel

Breaking permission inheritance

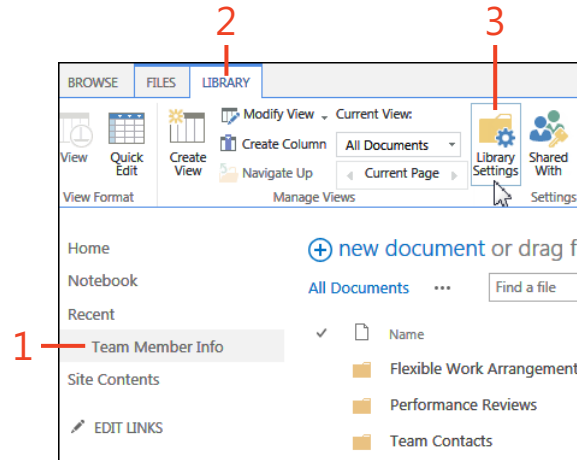
By default, all children objects (sites, pages, lists, libraries) inherit their permissions from their parent site. Permissions for objects cascade from the parent to the child. For instance, a subsite inherits the permissions of its parent site. A library inherits the permissions of the site in which it is created, and a document inherits the permissions of the library to which it is uploaded. If you want to stop this inheritance and customize permissions, you'll need to break inheritance.

Perhaps you have a site with team information for everyone on your team. By default, everyone who has access to a team library can see the documents in that library. Still, you might want to restrict the Performance Reviews folder to only allow managers to access it. In this case, you would break the inheritance from the parent library so that only the Managers group can see that particular folder.

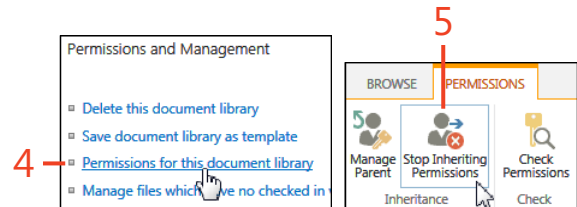
Break inheritance

- 1 Select the list or library with which you want to work (for this example, we'll work with a library).
- 2 On the ribbon, click the Library tab.
- 3 In the Settings group, click Library Settings.
- 4 On the Library Settings page, in the Permissions And Management section, click Permissions For This Document Library.
- 5 On the Permissions tab, in the Inheritance group, click Stop Inheriting Permissions.

(continued on next page)



1



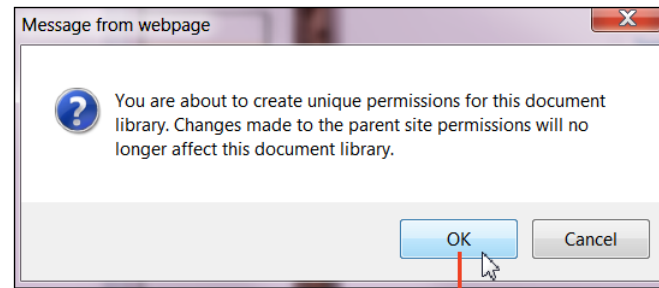
4

CAUTION Breaking inheritance prevents future changes to the parent permissions from cascading down to the child item.

TIP It is recommended to inherit permissions whenever possible to avoid burdensome maintenance.

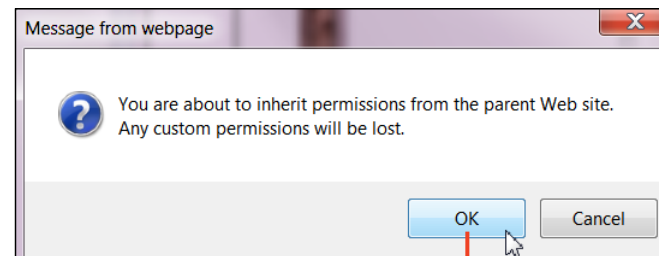
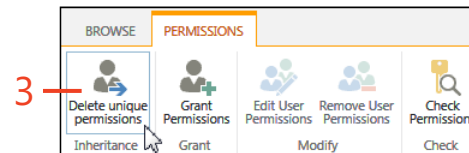
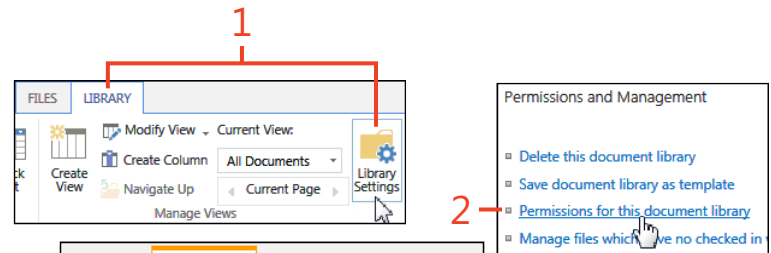
Break inheritance *(continued)*

- In the pop-up message box that asks you to confirm the change, click OK.



Inherit parent permissions

- Select the list or library with which you want to work (for this example, we'll work with a library). On the ribbon, click the Library tab and then, in the Settings group, click Library Settings.
- On the Library Settings page, in the Permissions And Management group, click Permissions For This Document Library.
- On the ribbon, click the Permissions tab and then, in the Inheritance group, click Delete Unique Permissions.
- In the pop-up message box that asks you to confirm the change, click OK.



TRY THIS Stop inheriting permissions on a list or library and then configure it to inherit permissions again.

Granting access to lists, libraries, and individual items

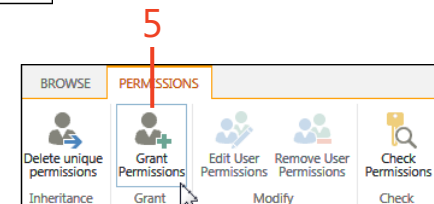
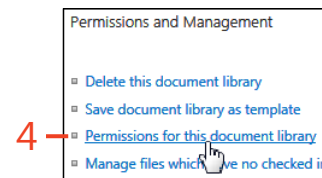
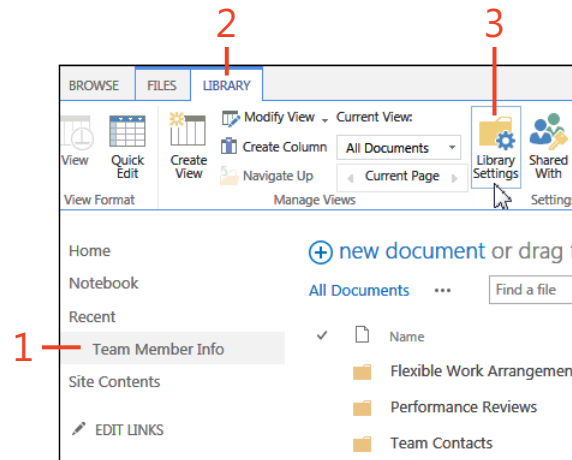
When not inheriting permissions from its parent, SharePoint 2013 allows owners to apply unique security at the site collection level, the site level, the library or list level, and to items within a library or list. You might want to grant your department

Read access to your site but only allow certain team members to edit documents within the site. SharePoint flexibly accommodates these needs.

Grant access to a list or library

- 1 Select the list or library with which you want to work (for this example, we'll work with a library).
- 2 On the ribbon, click the Library tab.
- 3 In the Settings group, click Library Settings.
- 4 On the Library Settings page, in the Permissions And Management group, click Permissions For This Document Library.
- 5 On the Permissions tab, in the Grant group, click Grant Permissions.

(continued on next page)



TIP This example assumes that this library does not inherit permissions from its parent.

Grant access to a list or library *(continued)*

- 6 In the Share dialog box, in the designated text box, enter names, email addresses, or the word "Everyone".
- 7 Click the Show Options button.
- 8 In the Select A Permission Level list box, select a permission level.
- 9 Click Share.

Invite people to "Contribute"

Enter names, email addresses, or "Everyone".

Include a personal message with this invitation (Optional).

HIDE OPTIONS

Send an email invitation

Select a group or permission level

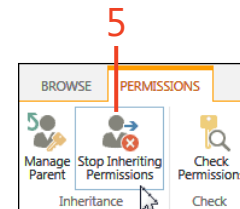
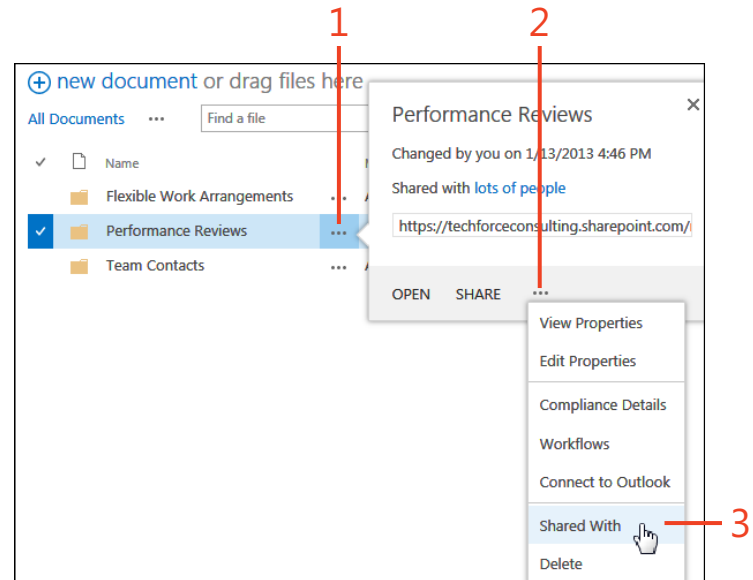
Contribute

Share Cancel

Grant access to individual items

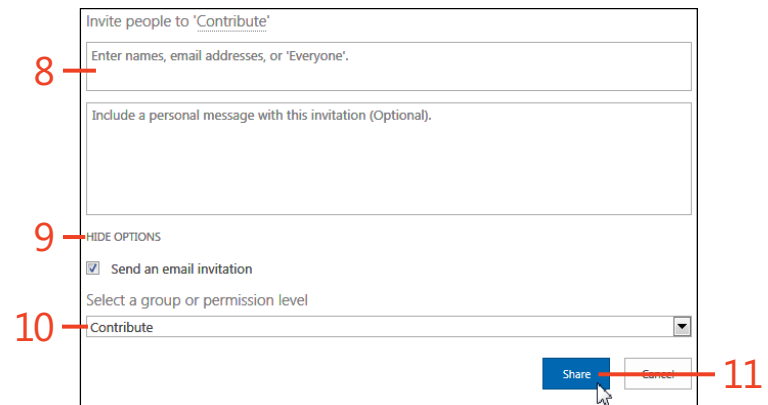
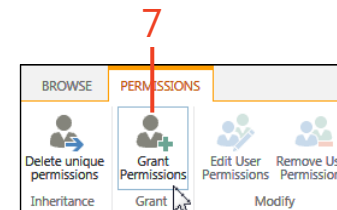
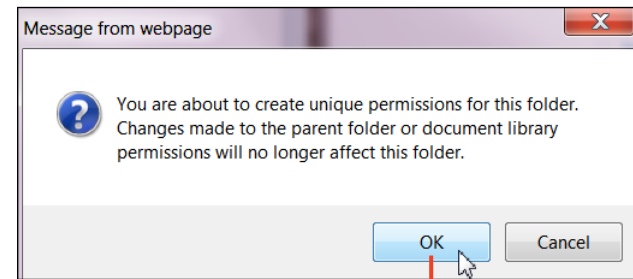
- 1 Click the drop-down ellipsis to the right of an item in a list or library. (Hover over the item to view the pointing hand.)
- 2 In the lower-right corner of the Properties box that opens, click the drop-down ellipsis. (Hover over the item to view the pointing hand).
- 3 On the menu that appears, click Shared With.
- 4 On the Shared With page, click Advanced.
- 5 On the Permissions tab, in the Inheritance group, click Stop Inheriting Permissions.

(continued on next page)



Grant access to individual items *(continued)*

- 6 In the pop-up message box that asks you to confirm the change, click OK.
- 7 Back on the ribbon, click Grant Permissions.
- 8 In the Share dialog box, in the designated text box, enter names, email addresses, or the word "Everyone".
- 9 Click the Show Options button.
- 10 In the Select A Permission Level list box, select a permission level.
- 11 Click Share.



Removing security

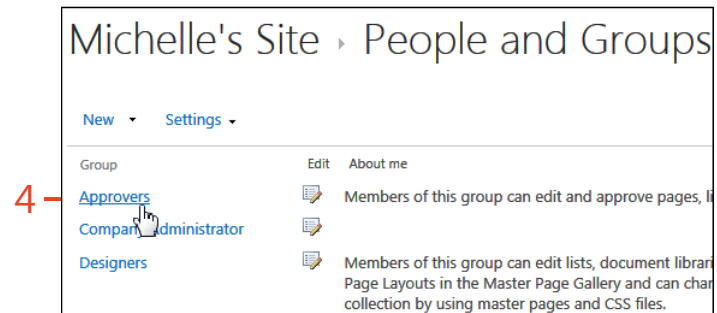
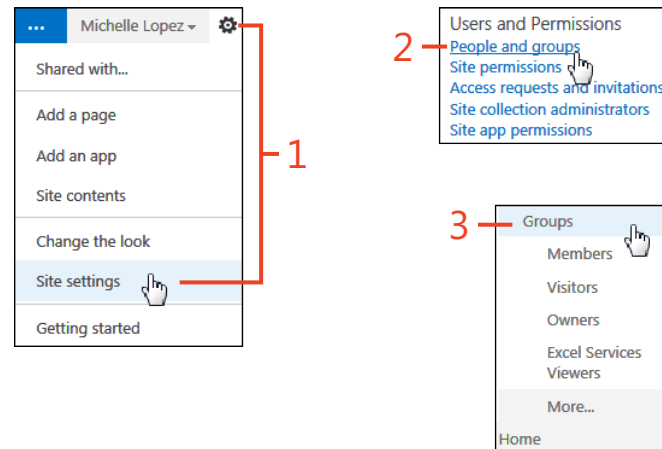
Logically, if you'll be granting access to SharePoint 2013, you'll be removing access, as well. Removing users from items or groups involves the same steps as adding users. You'll begin to realize the convenience of managing users in groups as

opposed to individually. Removing users from a group can be done in one location instead of each location where they've been added separately.

Remove a user from a group

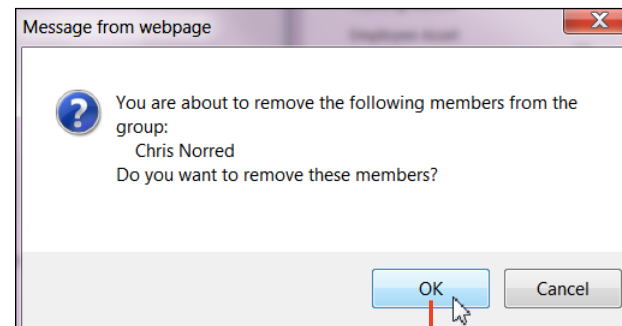
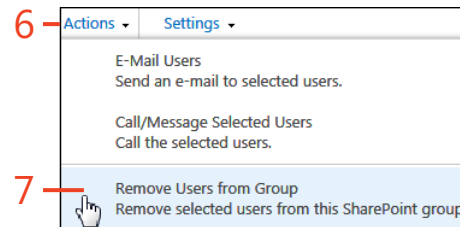
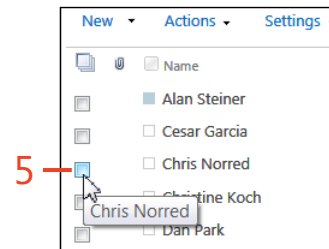
- 1 On the Home page, click the Settings button (the small gear icon next to the name of the logged-on user). On the menu that appears, click Site Settings.
- 2 On the Site Settings page, in the Users And Permissions section, click People And Groups.
- 3 On the Quick Launch bar, click Groups.
- 4 Click the name of the group from which you want to remove the user.

(continued on next page)



Remove a user from a group *(continued)*

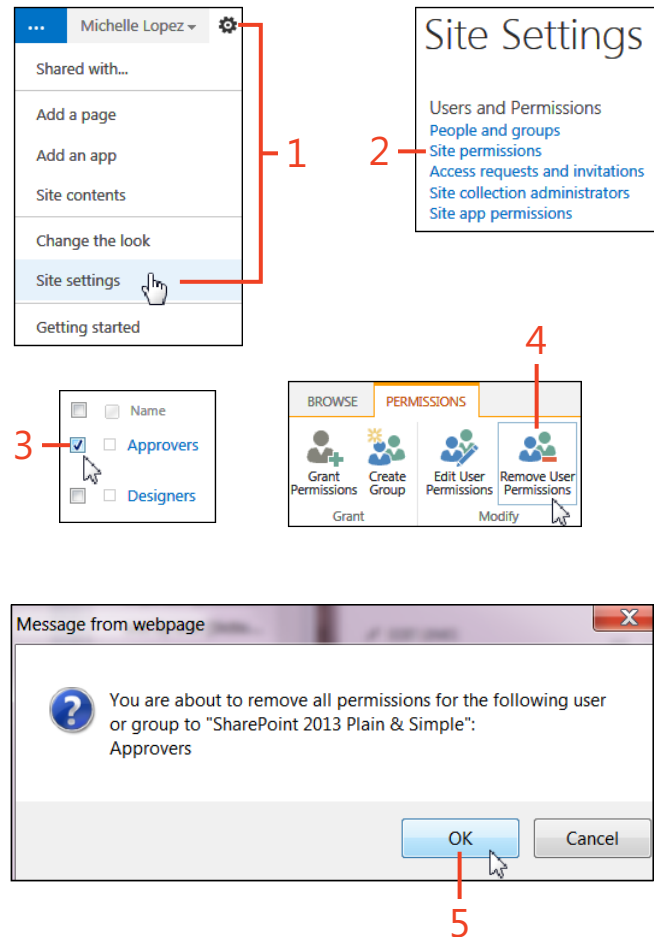
- 5 Select the check box next to the name of the user whom you want to remove.
- 6 Click the Actions drop-down arrow.
- 7 On the menu that appears, click Remove Users From Group.
- 8 In the pop-up message box that asks you to confirm the change, click OK.



TIP If you don't see the Actions menu, it's because you don't have permissions to edit members of that Group.

Remove a group's site permissions

- 1 On the Home page, click the Settings button (the small gear icon next to the name of the logged-on user). On the menu that appears, click Site Settings.
- 2 On the Site Settings page, in the Users And Permissions section, click Site Permissions.
- 3 Select the check box next to the group from which you want to remove site permissions.
- 4 On the Permissions tab, in the Modify group, click Remove User Permissions.
- 5 In the pop-up message box that asks you to confirm the change, click OK.



TIP This example assumes that this library does not inherit permissions from its parent.



CAUTION Removing a group from a site also removes the users within that group from the site.

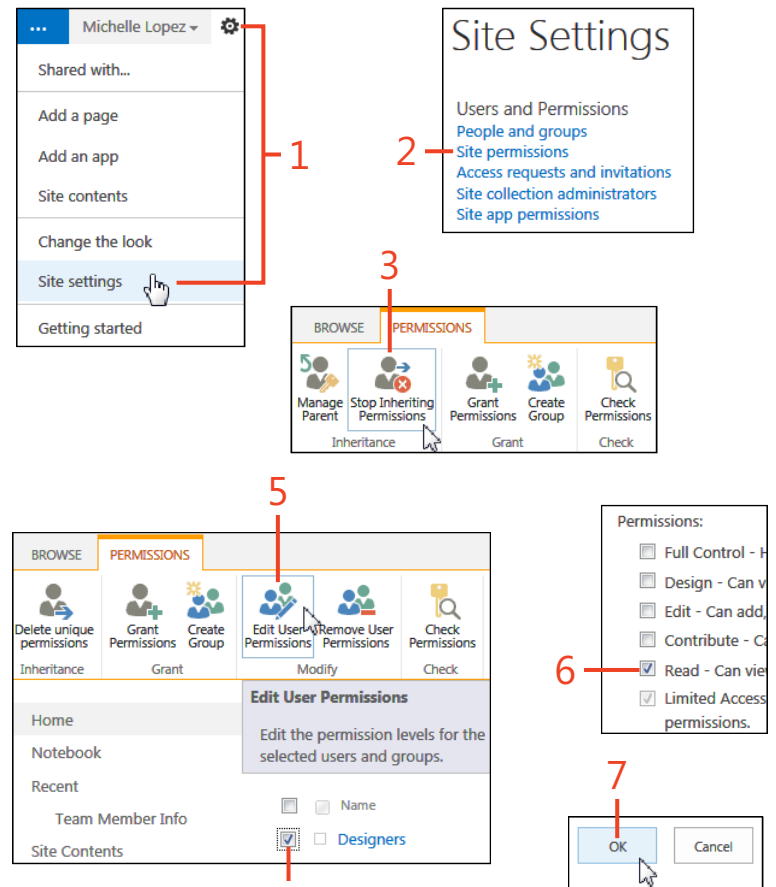
Editing permissions

Suppose that a project has completed and you no longer want the team to add or edit the project's supporting documents.

Edit site permissions for an individual or group

- 1 On the Home page, click the Settings button (the small gear icon next to the name of the logged-on user). On the menu that appears, click Site Settings.
- 2 On the Site Settings page, in the Users And Permissions section, click Site Permissions.
- 3 On the Permissions page, if the site is inheriting permissions, click Stop Inheriting Permissions, and then, in the pop-up message box that asks you to confirm the change, click OK.
- 4 Select the check box next to the group or individual for which you want to edit permissions.
- 5 Click Edit User Permissions.
- 6 Clear the current permissions check box and select a different one.
- 7 Click OK.

The flexibility of SharePoint 2013 gives you the ability to easily make changes to permission level of an individual or a group.



TIP Permissions will default to the highest level of security. Be sure to clear an existing Edit permission level check box if the user/group should only have Read access.

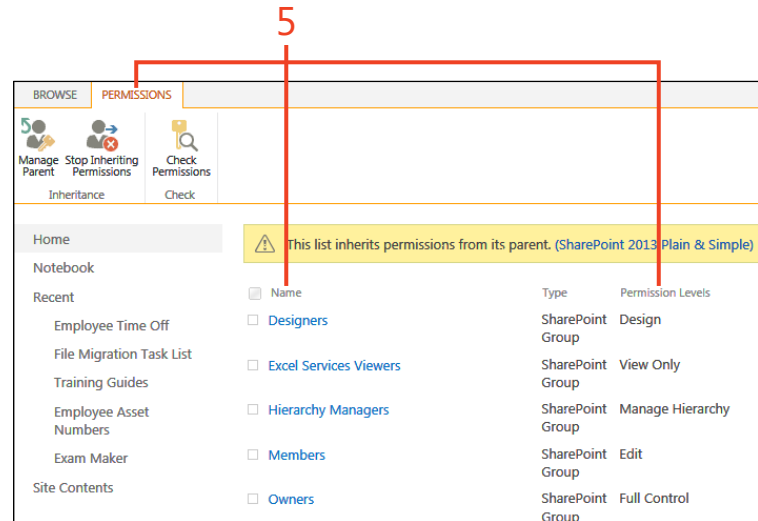
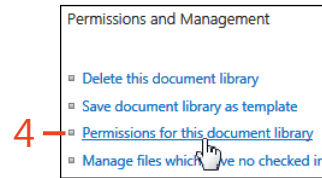
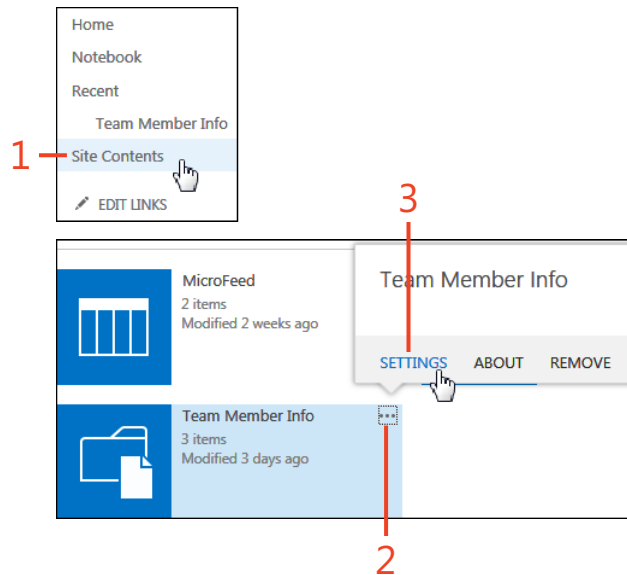
Checking permissions

It can be easy to lose track of who has access to your sites and libraries. You can use the tools on the SharePoint 2013 ribbon to

check what permissions are on an entire site or to view a summary of the permissions assigned to a group or individual.

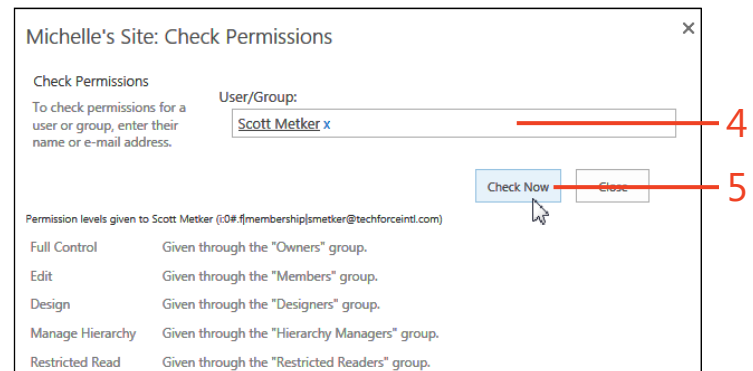
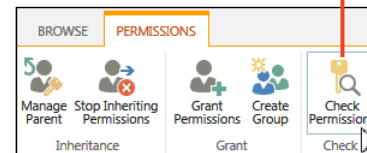
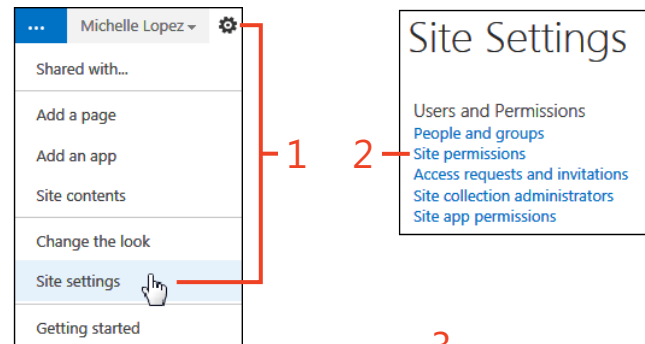
View permissions on a library or list

- 1 On the Quick Launch bar, click Site Contents.
- 2 Click the drop-down ellipsis to the right of the library with which you want to work. (Hover over the library for the drop-down indicator to display).
- 3 On the menu that appears, click Settings.
- 4 On the Library Settings page, in the Permissions And Management group, click Permissions For This Document Library.
- 5 On the Permissions tab, review each group name and permission level.



Check permissions for an individual or group

- 1 On the Home page, click the Settings button (the small gear icon next to the name of the logged-on user). On the menu that appears, click Site Settings.
- 2 On the Site Settings page, in the Users And Permissions section, click Site Permissions.
- 3 On the Permissions tab, in the Check group, click Check Permissions.
- 4 In the Check Permissions dialog box, in the User/Group text box, enter the name of the person or group.
- 5 Click Check Now.
- 6 In the Check Permissions dialog box, review the permission level summary.



Index

Symbols

- (minus sign), excluding keywords from search results, 310
- " " (quotation marks, double), surrounding search phrase, 309
- _ (underscore), using in list names, 76
- * (wildcard) operator, 308

A

- Access. *See also* Office 2013
 - connecting to SharePoint, 235
- achievement levels for Community Site members, 358
- Add A Document dialog box, 123, 136
- Add A Favorite dialog box, 287
- Add Content Dialog box, 127
- Adding Asset Library dialog box, 19, 121
- Adding Calendar dialog box, 186
- Adding Custom List dialog box, 76
- Adding Discussion Board dialog box, 193
- Adding Document Library dialog box, 97
- Adding Issue Tracking dialog box, 190
- Adding Tasks dialog box, 17, 179
- Additional Column Settings dialog box, 83
- Add To Default View setting command, list columns, 83
- Advanced Search, 320
- alerts
 - search alerts
 - creating, 322
 - editing or deleting, 324
 - setting on discussions, 368

- Announcements template, 82
- App Parts, 202, 203
 - adding to a page, 212
- Approval workflow, 379
- apps, 16, 74–75
 - adding from SharePoint Store, 75
 - adding on SharePoint, 16, 74
- asset libraries. *See also* media, working with
 - connecting to Microsoft Office, 138
 - creating, 18, 120
 - Enterprise Keywords, 128
 - tagging media files, 126
 - uploading and tagging media files, 122
 - uploading multiple files, 124
- attachments to list items, 78
- audiences, targeting Web Parts for, 219–222
- audio, 119
 - in asset libraries, 120
 - organizing files by using keywords and metadata, 129
- auditing policies, 165
 - creating, 172
 - in lists or libraries, 173
 - on site content type, 172
 - viewing auditing reports, 174
- auto-generated document IDs, 107

B

- badges, 340
 - assigning to members of Community Site, 356
 - creating, 31
 - viewing for Community Site members, 360
 - working with, on Community Sites, 354
 - creating badges, 354
 - editing a badge, 355
- barcodes, document barcode policies, 165
- Basic Search Center, 298
- Basic Search Center template, 38
- Best Reply to a post, 196
- blogs, 237–252
 - Blog site on My Site, 276
 - Blog template, 37
 - changing blog description, 244
 - changing blog picture, 242
 - components of a blog site, 238
 - creating a blog site, 239
 - creating personal blog site from SharePoint profile, 241
 - managing comments, 249
 - adding a comment, 249
 - viewing, editing, or deleting comments, 250
 - managing posts, 247
 - creating a post, 247
 - publishing post saved as draft, 248
 - publishing posts using desktop blogging tools, 252
 - subscribing to blog's RSS feed, 251
 - using categories to organize blogs, 245
 - editing a category, 246
 - Web Parts for, 203
 - Web Parts on Home page (example), 202
 - Yammer, corporate microblogging tool, 340

Blog Site template, 237
business data, Web Parts for, 203
Business Intelligence Center template, 38
business users, 8

C

calendar lists
 creating, 186
 switching calendar views, 187
calendars
 connecting SharePoint calendars to Outlook, 225
 scheduling events on, 188
Calendar template, 82
categories
 using on Community Sites, 352
 using to organize blogs, 245
 editing a category, 246
check in
 Check In dialog box, 105
 checking in a document, 105
check out
 checking out documents, 104
 requiring and displaying for documents, 102
Check Permissions dialog box, 273
Choose A File To Upload dialog box, 133, 137
Class Schedule listing, organizing using folders, 94
Collaboration tab, 41
colleagues, mentioning. *See* mentions
Collect Feedback workflow, 379
Collect Signatures workflow, 379
columns
 configuring in Gantt Charts, 183
 in list views, 91
 filtering on, 93
 sorting by, 92

list
 creating, 82
 deleting, 85
 editing, 84
 using validation rules, 86
Column Validation setting, list columns, 83
comments, blog, managing, 249
Community Portal template, 38
Community Sites, 339–376
 adding moderators to, 347
 adding users, 349
 badges, 354
 assigning to members, 356
 creating a badge, 354
 editing a badge, 355
 Community Site template, 37
 creating site collection, 343
 creating subsite, 345
 discussions
 creating, 362
 editing, 364
 managing replies, 370
 moderating, 372
 replying to, 365
 searching for, 366
 tracking in-progress discussions, 368
 enabling site-wide reputation tracking, 358
 Home page, 341
 joining an open site, 350
 managing community settings, 351
 moderation, importance of, 342
 overview, 340
 reviewing posts submitted for moderation, 374
 using Community Site template, 29
 viewing badges and reputation scores for members, 360

 Web Parts for, 204
 working with categories, 352
Configure Columns dialog box, 183
Contacts template, 82
content
 viewing site contents, 44
 Web Parts for, 206
Content Editor Web Part, 202, 206
content types
 associating document templates with, 70
 associating workflows with, 382
 browsing through, 66–67
 creating content type retention policies on a library, 168
 creating new, 68–69
 for documents, 98
 modifying document template for, 99
 site content type information management policies, accessing, 166
Contribute permission level, 256
Create A New Folder dialog box, 94
Create Workflow dialog box, 393
Custom List apps, 76

D

Datasheet views, lists, 88
Default Value setting, list columns, 83
deleting data
 Delete This List (or Delete This Library), 77
 list columns, 85
 list items, 80
descriptions
 changing blog description, 244
 changing site description, 45
Description setting, Additional Column Settings dialog box, 83
Design permission level, 256
Developer Site template, 37

- discussion boards
 - connecting discussion thread to Outlook, 197
 - creating, 192
 - participating in discussion
 - replying to discussion thread, 195
 - starting discussion thread, 194
 - rating discussions, 196
- discussions (on Community Sites), 340
 - categories for, 352
 - creating, 362
 - creating discussion site as community subsite, 29
 - Discussion List section, Home page, 341
 - editing, 364
 - managing replies, 370
 - moderating, 372
 - finding unanswered questions, 372
 - marking discussion as featured, 373
 - replying to, 365
 - reviewing posts submitted for moderation, 374
 - searching for, 366
 - tracking in-progress discussions, 368
- Disposition Approval workflow, 379
- distribution/security group audiences, 219
- document barcode policies, 165, 176
- Document Center template, 37
- document label policies, 165, 176
- document libraries
 - accessing information management policies, 167
 - breaking permission inheritance, 262
 - creating, 96
 - creating content type retention policy on, 168
 - excluding from search, 332
 - inheriting parent permissions, 263

- on My Site, 278
- searching within, 315
- documents
 - attaching to list items, 78
 - checking in and out, 104
 - configuring document sets on a document library, 116–118
 - configuring document sets on a site, 114
 - document set options, 115
 - turning on document sets feature, 114
 - configuring with document IDs, 106
 - document ID settings, 107
 - copying or sharing, 112
 - downloading copy of a document, 112
 - sharing, 113
 - customizing document templates, 98
 - Document Set Web Parts, 205
 - launching workflows on, 384
 - managing with a document library, 96
 - moving, 110
 - adding custom Send To location, 111
 - using Send To menu, 110
 - previewing in Search Center, 318
 - requiring and displaying document check out, 102
 - uploading multiple, 100
 - using Explorer, 101
 - using document IDs, 108
 - Find By Document ID Web Part, 109
 - locating ID on a document, 108
- document templates, associating with content types, 70
- Download A Copy command, 112

E

- eDiscovery cases, 397
- eDiscovery Center template, 37
- eDiscovery Download Manager dialog box, 411

- eDiscovery queries, 397
- eDiscovery sets, 397, 403
- eDiscovery, SharePoint and, 395–412
 - accessing deleted content under legal hold, 406
 - creating eDiscovery Center, 32, 32
 - creating eDiscovery query, 408
 - eDiscovery Center site, 396
 - items to work with, 397
 - exporting eDiscovery results, 410
 - identifying and holding content, 403
 - introduction to eDiscovery and legal holds, 396
 - removing a hold, 405
 - working with eDiscovery cases, 400
 - accessing existing cases, 402
 - creating eDiscovery case, 400
- eDiscovery Site template, 32
- eDiscovery sources, 397
- Edit command (for list items), 79
- Edit permission level, 256
- Edit Properties dialog box, 130
 - Change Thumbnail, 20
- electronic discovery. *See* eDiscovery
- email, archiving Outlook email in SharePoint, 227
- Enforce Unique Values setting (list columns), 83
- Enterprise Keywords, 128
 - enabling, 129
- Enterprise Search Center, 298
- Enterprise Search Center template, 38
- Enterprise Wiki template, 38
- events, scheduling on the calendar, 188
- Excel
 - exporting data from SharePoint list to, 232
 - exporting table to SharePoint, 233
 - spreadsheets, importing into SharePoint, 229–231

excluding site content from search, 330

Explorer

uploading multiple files with, 101

using on library ribbon, 100

Export: Download dialog box, 411

F

favorites, adding notes tool to, 287

featured discussion, marking, 373

files

following SkyDrive Pro documents, 155

locating followed documents using

SkyDrive Pro, 157

locating followed documents using the

newsfeed, 156

saving to SkyDrive Pro

for access only by you, 150

to be shared with everyone, 148

sharing SkyDrive Pro files, 152

sign-in requirement, 154

synchronizing SkyDrive Pro to your local

computer, 158

discontinuing synchronization, 160

limits on synchronizing content in Sky-

Drive Pro, 162

file types for document libraries, 98

filtering

dynamic filtering within search results, 316

filter Web Parts, 205

lists, 89

list views, 93

using search refinement to filter

results, 317

Find By Document ID Web Part, 109

folders

setting folder retention policy source, 170

Shared With Everyone folder on My

Site, 278

using to organize items, 94

following people, 280

searching for people to follow, 282

searching by keyword, 283

stop following a person, 281

viewing status of a colleague, 285

following SkyDrive Pro documents, 155

locating followed documents using

SkyDrive Pro, 157

locating followed documents using the

newsfeed, 156

forms, Web Parts for, 205

formulas

validation formula for a list, 87

validation formula for a list column, 86

Full Control permission level, 256

G

gamification, 354

Gantt Charts

configuring columns, 183

viewing tasks in, 182

global audiences, 219

Groove (Workspaces), replacement with

SkyDrive Pro, 22

groups, 254

adding people to, 256

existing groups, 257

checking permissions for, 273

creating, 258

editing site permissions for a group, 271

permission levels assigned to, 255

removing group's site permissions, 270

removing users from, 268

targeting Web Parts for SharePoint

groups, 219

H

holds (eDiscovery)

creating, 403

removing, 405

I

images

changing blog picture, 242

in asset libraries, 120

inserting image from SharePoint on

SharePoint page, 140

using image from computer as video

thumbnail, 132

Image Viewer Web Part, 202, 206

individual items, granting access to, 266

individuals, checking permissions for, 273

information management policies, 163–176

creating auditing policies, 172

creating content type retention policies on

a library, 168

document label and document barcode

policies, 176

inheritance of, 165

introduction to, 164

list information management policies,

accessing, 167

setting library or folder-based retention

schedules, 170

site content type, accessing, 166

types of, 165

viewing auditing reports, 174

information, organizing and managing, 57–72

associating document templates with

content types, 70

browsing through content types, 66

browsing through site columns, 62

creating new content type, 68

creating site columns, 64

- introduction to SharePoint
 - metadata, 58–61
 - working with workflows, 72
- inheritance
 - breaking permission inheritance, 262
 - information management policy, 165
 - parent permissions, 263
- integration between SharePoint and Office. *See also* Office 2013
 - using SharePoint assets in Office, 138
- issue tracking lists, 190
 - creating, 190
 - configuring issue categories, 191
- items
 - attaching to list items, 78
 - list. *See* lists

K

- Keyword Query Language (KQL), 305
- keywords. *See also* search
 - Enterprise Keywords, 128

L

- labels, document label policies, 165
- legal holds, 396
 - accessing deleted content under, 406
- libraries, 73. *See also* lists
 - breaking permission inheritance, 262
 - connecting SharePoint libraries to Office, 224
 - creating, 76
 - creating audit policy within, 173
 - creating content type retention policies on a library, 168
 - defined, 76
 - deleting, 77

- document library, 96
 - accessing information management policies, 167
 - configuring document sets on, 116–118
 - creating, 96
 - dragging multiple documents to, 100
 - modifying document template for, 98
 - requiring and displaying document check out, 102
- document library on My Site, 278
- granting access to, 264
- granting access to individual items in, 266
- inheriting parent permissions, 263
- setting library retention policy source, 170
- viewing permissions for, 272

Limited Access permission level, 256

lists, 73–94

- adding items, 78
- adding to a page, 212
- apps, 74
- associating workflows with, 380
- creating, 76
- creating and selecting list view, 90
- creating audit policy within, 173
- creating list columns, 82
- creating list workflow in SharePoint Designer, 386
- deleting items, 80
- deleting list columns, 85
- editing list columns, 84
- editing list items, 79
- excluding from search, 332
- exporting data from SharePoint list to Excel, 232
- filtering, 89
- granting access to, 264
- list information management policies, accessing, 167

- organizing by using folders, 94
- restoring deleted items, 81
- sorting, 88
- sorting or filtering list view, 92
- using list and column validation rules, 86
- viewing permissions for, 272

list workflows, 378

logo, changing for a site, 45

look and feel of a site, customizing, 14, 47

M

Maximum Number Of Characters setting, list columns, 83

media, working with, 119–144

- adding media to SharePoint page, 140
 - inserting image from SharePoint, 140
 - inserting video in SharePoint page, 142
- asset libraries, 120
- associating related content to video file, 136
- connecting to Office 365, 139
- Enterprise Keywords, 128
- organizing files by using keywords and metadata, 129
- tagging media files, 126
- uploading and tagging media files, 122
- uploading multiple files, 124
- using picture from web as thumbnail, 134
- using SharePoint assets in Microsoft Office, 138
- video files, 130
- Web Parts for media, 206

member achievements point system, 359

Member group, 256

mentions, 290

- mentioning a colleague feature, 24
- finding who has mentioned you, 25

- menu drop-down icon (...), 90
- metadata, 58
 - adding to media files through tagging, 126
 - excluding site columns from search, 334
 - information contained with media, 122
 - organizing media files using, 129
- Metadata Input dialog box, 123
- Microsoft Access. *See also* Office 2013
 - connecting to SharePoint, 235
- Microsoft Office. *See* Office; Office 365; Office 2013
- Microsoft Outlook. *See* Outlook
- Microsoft Project
 - mapping synchronization fields, 199
 - synchronizing Project with a tasks list, 198
- Microsoft Visio
 - creating workflows in Visio 2013, , 34
 - importing Visio workflows into SharePoint Designer, 392
 - integration with SharePoint workflows, 389
 - Visio visual designer, 389
 - Visio Process Repository template, 38
- Microsoft Word. *See* Word
- moderation
 - adding moderators to Community Sites, 347
 - moderating discussions on Community Sites, 372
 - finding unanswered questions, 372
 - marking discussion as featured, 373
 - on Community Sites, 342
 - reporting a reply to the moderator, 371
 - reporting of offensive content to moderators, 351
 - reviewing posts submitted for, 374
- Modify Query Scope dialog box, 409

- My Site. *See also* personal sites; social networking
 - introduction to, 276
- My Site Host template, 38
- My Tasks. *See also* tasks
 - expanding My Tasks settings, 26

N

- naming lists, 76
- navigation
 - editing publishing site navigation, 53
 - editing Top Link bar on non-publishing site, 52
 - tree view settings, changing for a site, 49
- NEAR operator, 311
- New Document Set dialog box, 118
- newsfeed, locating followed SkyDrive Pro documents with, 156
- New SharePoint Blog Account dialog box, 252
- Note Board
 - adding notes tool to favorites, 287
 - using, 286

O

- offensive content, reporting on Community Sites, 351, 371
- Office
 - previewing search documents via Office Web Apps integration, 28
 - using SharePoint assets in Office, 138
- Office 365
 - connecting to, 139
 - version of SharePoint platform, 8
- Office 2013, 9
 - using SharePoint with, 223–236
 - archiving Outlook email in SharePoint, 227

- connecting Access and SharePoint, 235
- connecting SharePoint calendars to Outlook, 225
- connecting SharePoint libraries to Office, 224
- exporting data from SharePoint list to Excel, 232
- exporting Excel table to SharePoint, 233
- importing spreadsheet into SharePoint, 229–231

- Office Store, 16

- Open In Microsoft Access dialog box, 235
- organizing people and work, 177–200
 - adding multiple tasks and subtasks, 184
 - creating calendar lists, 186
 - creating project schedule using tasks list, 178
 - adding tasks to task list, 180
- discussion boards
 - connecting discussion thread to Outlook, 197
 - creating, 192
 - participating in discussion, 194
 - rating discussions, 196
- scheduling events on the calendar, 188
- synchronizing projet tasks with Microsoft Project, 198
- using issue tracking lists, 190
- viewing tasks in a Gantt Chart, 182

- OR keyword, 307

- Outlook
 - archiving Outlook email in SharePoint, 227
 - connecting discussion to, 197
 - connecting SharePoint calendars to, 225
 - synchronizing tasks with, 295
- Owner group, 256

- P**
- People And Groups page for moderators group, 348
 - people, organizing. *See* organizing people and work
 - permissions. *See also* security
 - assigning to groups, 259
 - breaking permission inheritance, 262
 - checking, 272
 - editing, 271
 - granting to individuals, 260
 - inheriting parent permissions, 263
 - permission levels, defined, 256
 - personal sites, 275–296
 - editing user profile on My Site, 277
 - following people, 280
 - introduction to My Site, 276
 - searching for people to follow, 282
 - updating your status, 284
 - uploading content, 278
 - using tasks, 292–296
 - personal views, switching from, 218
 - Photos dialog box, 243
 - posts, blog
 - managing, 247
 - creating a post, 247
 - publishing post saved as draft, 248
 - publishing using desktop blogging tools, 252
 - using a tag in, 289
 - prefix, assigning to new document IDs, 107
 - Preservation Hold Library, 406
 - Product Catalog template, 39
 - profiles
 - creating personal blog site from SharePoint profile, 241
 - editing user profile on My Site, 277
 - Project
 - mapping synchronization fields, 199
 - synchronizing with a tasks list, 198
 - projects
 - creating project schedule using tasks list, 178
 - synchronizing projet tasks with Microsoft Project, 198
 - Project Site template, 37
 - promoting search results, 328
 - Publishing Approval workflow, 379
 - publishing sites
 - editing site navigation, 53
 - Publishing Site templates, 39
- Q**
- questions (unanswered), finding on discussions, 372
 - Quick Launch bar, editing on non-publishing site, 50
- R**
- rating discussions, 196
 - Read permission level, 256
 - Records Center template, 38
 - Recycle Bin, restoring deleted list items from, 81
 - replies to discussions, 365
 - managing, 370
 - removing a best reply, 371
 - reporting a reply to the moderator, 371
 - Report Offensive Content dialog box, 371
 - reputation scores, 340
 - viewing for Community Site members, 360
 - reputation tracking (site-wide) on Community Sites, 358
 - Require The Column To Contain Information setting, 83
 - resources for additional information, 9
 - restoring deleted data, 81
 - retention policies
 - creating content type retention policies on a library, 168
 - defined, 165
 - setting library or folder-based retention schedules, 170
 - types of, 164
 - reusable workflows, 378
 - ribbon, 3
 - RSS feeds, subscribing to blog's feed, 251
- S**
- Saturday events (SharePoint), 9
 - schedules
 - creating project schedule using tasks list, 178
 - scheduling an event on the calendar, 188
 - synchronizing project schedule with SharePoint project task lists, 198
 - search, 297–338
 - Basic Search Center template, 38
 - effective techniques, 305
 - excluding keywords, 310
 - finding content containing all keywords, 306
 - finding content matching any of keywords, 307
 - finding nearby keywords, 311
 - searching for complete phrases, 309
 - searching on partial keywords, 308
 - Enterprise Search Center template, 38
 - excluding document libraries and lists from, 332
 - excluding site columns from, 334
 - excluding site content, 330

- learning SharePoint 2013 search results screen, 300
- maintaining search configurations, 336
 - exporting search configuration, 336
 - importing search configuration, 337
- preparing your site for, 312
 - associating Search Center to your site, 312
- previewing results in Search Center, 318
 - documents, 318
 - videos, 319
- previewing search documents, 28
- promoting search results, 328
- search alerts, 322
 - creating, 322
 - editing or deleting, 324
- Search Center, 298
 - creating, 302
- searching for discussions on SharePoint sites, 366
- searching from a Search Center, 304
- searching site content, 314
 - searching from Home page of site, 314
 - searching within document library, 315
- setting search preferences, 326
- using advanced search, 320
- using search refinement, 316
 - filtering results with search refiners, 317
- Web Parts for, 206
- search-driven content, Web Parts for, 206
- security, 253–274
 - adding people to groups, 256
 - breaking permission inheritance, 262
 - checking permissions, 272
 - for individual or group, 273
 - viewing permissions for library or list, 272
 - creating groups, 258
 - editing permissions, 271
 - granting access to lists, libraries, and individual items, 264–267
 - granting permissions to individuals, 260
 - removing, 268
 - group's site permissions, 270
 - user from a group, 268
 - viewing site permissions, 254
- security group audiences, 219
- Select Audiences dialog box, 221
- Send To menu
 - adding custom Send To location, 111
 - moving documents, 110
- Server edition, 8
- Share dialog box, 257
 - adding moderators to Community Site, 348
 - adding users to Community Sites, 349
- shared views, switching from, 218
- SharePoint 2013
 - essential tasks, 3
 - new and improved features, 11–34
 - adding thumbnail to a video, 20
 - creating an asset library, 18
 - creating an eDiscovery Center, 32
 - creating a new site, 12
 - creating badges, 31
 - customizing the interface, 14
 - expanding My Tasks settings, 26
 - mentioning a colleague feature, 24
 - previewing search documents, 28
 - SkyDrive Pro, 22
 - timeline feature for tasks, 23
 - using Community Site template, 29
 - using Office Store, 16
 - overview of topics covered, 3–7
- SharePoint apps. *See* apps
- SharePoint Designer
 - creating list workflow in, 386
 - importing Visio workflows into, 392
 - switching to visual designer, 390
- SharePoint Foundation 2013 version, 8
- SharePoint Server 2013 version, 8
- SharePoint Store
 - adding an app from, 75
 - apps, 74
- sharing documents, 113
- Sign In To Office dialog box, 139
- site collection
 - creating for Community Site, 343
 - creating for eDiscovery Center, 32
- site columns, 58
 - creating, 64
 - excluding from search, 334
- Site Contents, 44
- site content types. *See also* content types
 - creating audit policy on, 172
 - information management policies, accessing, 166
- sites
 - configuring document sets on, 114
 - creating a new site, 12
 - customizing the interface, 14
 - extending functionality with Web Parts, 202
 - getting started with, 35–56
 - accessing a SharePoint site, 36
 - changing navigation tree view settings, 49
 - changing the look and feel, 47
 - changing title, description, and logo, 45
 - creating SharePoint site from a template, 40
 - editing publishing site navigation, 53
 - editing Quick Launch bar on non-publishing site, 50
 - editing Top Link bar on non-publishing site, 52

- locating content on a site, 44
- saving site as a template, 55
- SharePoint 2013 templates, 37
- understanding sites, 36
- Site Settings, 44
- site workflows, 378
- SkyDrive Pro, 22, 145–162
 - accessing, 22
 - accessing your account, 147
 - definition of and description of capabilities, 146
 - following documents, 155
 - limits on synchronizing content in, 162
 - locating followed documents using the newsfeed, 156
 - requiring sign-in for file sharing, 154
 - saving files for access only by you, 150
 - saving files to be shared by everyone, 148
 - sharing files, 152
 - synchronizing to your local computer, 158
 - discontinuing synchronization, 160
- Skype, 340
- social collaboration, Web Parts for, 207
- social networking
 - following people, 280
 - searching for people to follow, 282
 - stopping following a person, 281
 - updating your status, 284
 - using mentions, 290
 - using tags, 288
 - using tasks, 292–296
 - using your note board, 286
 - viewing status of a colleague, 285
- sorting
 - lists, 88
 - list view, 92
- Stage Properties dialog box, 169
- Standard views. list, 88
- Stop Syncing A Folder dialog box, 161

- Subscribe To This Feed dialog box, 251
- subsites
 - community subsite, creating discussion site as, 29
 - creating for Community Sites, 345
- subtasks, adding to task list, 185
- synchronizing SkyDrive Pro to your local computer, 158
 - discontinuing synchronization, 160
 - limits on synchronizing content in SkyDrive Pro, 162
- Sync Tasks With Microsoft Outlook dialog box, 295

T

- tagging, 288
 - adding a tag to a document, 288
 - adding metadata to media files, 126
 - using a tag in a post, 289
- Tags And Note Board dialog box, 286
 - adding tags to documents, 288
- tasks
 - adding multiple tasks and subtasks, 184
 - adding to a timeline, 181
 - adding to task list, 180
 - automating with workflows. *See* workflows
 - creating project schedule with task lists, 178
 - essential, 3
 - expanding My Tasks settings, 26
 - My Tasks page, 292
 - adding new task, 292
 - customizing tasks views, 294
 - highlighting important tasks, 293
 - synchronizing project tasks with Microsoft Project, 198
 - Tasks page on My Site, 276
 - timeline feature for, 23
 - viewing in a Gantt Chart, 182

- Tasks template, 82
- Team Site – SharePoint Online configuration template, 38
- Team Site template, 13, 37
 - anatomy of a team site, 42
 - creating a team site from, 40
- templates
 - creating a SharePoint site from, 40
 - customizing document templates, 98
 - for common list types, 82
 - modifying document template for content type, 99
 - saving site as a template, 55
 - SharePoint 2013 site templates, 37
- Three-State workflow, 379
- thumbnails
 - adding to video, 20
 - capturing from video, 130
 - using image from computer as, 132
 - using picture from web as thumbnail, 134
- timelines
 - adding task to a timeline, 181
 - using timeline feature for tasks, 23
- title, changing for a site, 45
- Top Link bar, editing on non-publishing site, 52
- tree view settings, changing for a site, 49
- trust confirmation for apps, 75

U

- unanswered questions, finding on discussions, 372
- Upload Image dialog box, 243
- user groups, SharePoint, 9
- users. *See also* security
 - adding to Community Sites, 349
 - adding to groups to manage security settings, 254
 - removing from groups, 268

V

validation, using list and column validation rules, 86

video

- adding thumbnail to a video, 20
- associating related content to video file, 136
- in asset libraries, 120
- inserting video in SharePoint page, 142
- previewing in Search Center, 319
- previewing search results, 28
- using image from computer as thumbnail, 132
- using picture from web as thumbnail, 134
- working with video files, 130

View Only permission level, 256

views

- list, 88
 - creating and selecting, 90
 - sorting or filtering, 92

Visio. *See* Microsoft Visio

Visio Process Repository template, 38

Visitor group, 256

visual designer, 390

- using for workflows in SharePoint Designer, 34

W

Web Part properties dialog box, 215

Web Parts, 201–222

- adding App Part to a page, 212
- adding to a Web Part page, 210
- adding to a wiki page, 208
- and App Parts, 202
- available with SharePoint 2013, 203–207

editing properties, 214

Find By Document ID, 109

personalized Web Parts on pages, 216

- adding Web Part to personalized page, 216

- switching from personal and shared views, 218

targeting for an audience, 219–222

wiki page, adding Web Parts to, 208

wildcard operator (*), 308

Windows Live Writer, publication of blog posts, 252

Word

connecting to Office 365, 139

opening and saving documents directly to SharePoint libraries, 223

using to publish blog posts, 252

workflows, 377–394

associating with content types, 382

associating with lists, 380

checking status of running workflow, 385

creating in Visio 2013, 391

creating list workflow in SharePoint Designer, 386

defined, 378

editing, 388

- existing workflow, 388

importing Visio workflows into SharePoint Designer, 392

launching on documents, 384

Microsoft Visio integration with, 389

publishing site with workflow template, 39

supplied with SharePoint, 379

using to automate document tasks, 72

using visual designer for workflows in SharePoint Designer, 34

work, organizing. *See* organizing people and work

Workspaces, replacement with SkyDrive Pro, 22

Y

Yammer, 340

About the authors

Johnathan Lightfoot is the Principal SharePoint Architect at GP Strategies. He has been involved with IT for more than 20 years, having worked in various roles, including Help Desk, Level II and III desktop support, and Windows and AS-400 server administration and development. Companies he has worked for in the past include Electronic Data Systems, Hawaiian Telcom, and Norwegian Cruise Line (yes, he actually worked on the ships). However, the best experiences he says he has had were his nine years serving in the United States Navy. Johnathan is also a Microsoft Certified Trainer (MCT) who specializes in SharePoint 2013, 2010, MOSS 2007, WSS 3.0, Office 2007/2010/2013, and Office 365 technologies, along with providing Soft Skills training for organizations. Johnathan also speaks at SharePoint and social networking events around the world.

Michelle Lopez is a Certified Microsoft Office Specialist (MOS) who specializes in SharePoint 2013, 2010, 2007, as well as InfoPath and Office technologies. She worked for 15 years at Microsoft Corporation and has dedicated the past 6 years of her career to championing SharePoint solutions to communities and companies nationwide.

Michelle is from Redmond, Washington, and currently lives in Scottsdale, Arizona, with her husband Carlos and their three young children.

Scott Metker has been an enterprise architect on Fortune 500 corporate software implementations for the past 15 years. His current role, Chief Software Architect at GP Strategies, enables him to focus on new product development and implementing software development methodologies. He has worked extensively with the Microsoft SharePoint and Dynamics platforms and currently develops commercial applications on these platforms with a focus on bringing cloud-based technologies to regulated industries such as Life Sciences.

Scott originally comes from an academic background, with a doctoral degree in electrical engineering, but he has embraced a role in private industry producing software for large enterprise and government clients. He frequently speaks at industry conferences and also teaches as an affiliate instructor at Loyola University Maryland.

What do you think of this book?

We want to hear from you!

To participate in a brief online survey, please visit:

microsoft.com/learning/booksurvey

Tell us how well this book meets your needs—what works effectively, and what we can do better.
Your feedback will help us continually improve our books and learning resources for you.

Thank you in advance for your input!

Microsoft[®]
Press