WORKING WITH SITES

Sites are a useful feature of SharePoint Online. You can create team sites in order to collaborate and communicate with those inside your organisation, or you can create a public site which can be accessed by people outside of your organisation and used as the main organisation website.

In this session you will:

✓ gain an understanding of sites
✓ gain an understanding of team sites
✓ learn how to create a new site
✓ gain an understanding of the *Site* screen
✓ learn how to navigate a site
✓ gain an understanding of site contents
✓ learn how to change the look of a site
✓ gain an understanding of site settings
✓ gain an understanding of apps
✓ gain an understanding of libraries in *SharePoint* sites
✓ gain an understanding of lists
✓ learn how to add a page to a site
✓ learn how to add web parts to a page
✓ learn how to edit links
✓ learn how to add existing apps to pages
✓ learn how to delete apps
✓ learn how to delete sites
✓ gain an understanding of the *SharePoint* mobile app.

UNDERSTANDING SITES

One of the options available in the Office 365 for Business app launcher is **SharePoint**. As part of each subscription you have the ability to create one **public site** which can be used as your company's website, and multiple **team sites** which are internal sites for those in the workplace.

Team Sites

Every organisation has a default team site already created. A team site is an internal site that you can use to communicate and collaborate with your colleagues. The site itself is customisable and can contain contents such as pages, document libraries, lists and other apps. By default, each team site is created with a document library and newsfeed. Sites are different in structure to typical internet websites. Internet websites comprise linked pages, while sites comprise pages that act as repositories for information and content. Sites store this information and content in special containers known as **lists** and **document libraries** (you'll learn about these elements later in this chapter).

You have the ability to add pages and subsites to a team site. Pages are individual web pages that can contain a variety of different content such as web parts, document libraries and other apps. You can add links to pages on the team site for easy navigation. A subsite is a site that is a subsidiary of a team site. You may wish to create a subsite if you want to manage additional content related to the project or team the team site is created for. For instance, you may have a department site and wish to have a subsite that contains all the documents and information relating to meetings for that department. Though department meetings are related to the other department information it is useful to keep all the meeting content together.

You can also change the look of your site to reflect your company or team including adding a logo, changing the colour scheme and fonts and the general layout.

Public Sites

Every organisation has a default public site already created. You can only create a public site if you have administrator permissions. A public site, unlike a team site, is a website that is accessible to the public. You can use it to inform the public (usually customers and potential customers) about your business, products and services and how to contact you. A public site is set up slightly differently from a team site. A public site is created with a number of pages by default as well as a **Blog** subsite and a search function. You can modify the public site to include different kinds of content.

Communication Sites

Communication sites allow you to create aesthetically pleasing sites designed to communicate information internally such as a product launch or the like. Unlike team sites, communication sites are not so much workspaces as communication tools.

Site Collections

Every site is part of a **site collection**. A site collection is, just as it sounds, a collection of related sites. The site at the top of a site collection is known as the top-level or root site – this is the site that was created first. If you then create a site from within the top-level site, such as a team site, this new site will be known as a subsite or child site.

The subsites and top-level site in a site collection are linked which means that site visitors can navigate between the sites (if they have the appropriate permissions). The sites may also share attributes such as security, but they will contain different content such as pages, lists and libraries.

Although you can create as many subsites as desired in the one site collection, it's better not to; otherwise, site navigation and management may become very difficult. Instead, if you are part of a large organisation, your site collection will probably be just one of many site collections which form part of a larger corporate portal site – commonly, large organisations will create a site collection per department (e.g., Operations, Sales).

Personal Sites

A **personal site** is an online site for individual users in an organisation that shows information belonging to only that user, such as their emails, upcoming meetings from their calendar, tasks assigned to them, and a list of recently worked on documents. You can also keep your personal details up to date here, especially if they are used in a corporate directory.

You can upload documents to the personal document library (**OneDrive for Business**) in your personal site, and only you can see and manage these documents until you share them. A personal site also has a page for managing sites that you are following and a newsfeed that tells you what your colleagues are up to.

Personal sites may not be available with every Office 365 subscription.

TEAM SITES

When your organisation takes on an Office 365 subscription that includes SharePoint, an organisation team site is created by default. Users can also create additional team sites. Sites are based on site templates. Office 365 only provides the **Team site** template for your main sites (though there are more site template options for subsites).

What Is A SharePoint Team Site?

A team site:

- is a *private website* that provides a central storage and collaboration space for documents, information and ideas for team members only. Other employees within the organisation, but outside the team, and people outside the organisation cannot access the team site.

- provides a *storage container* for the team's work. When a team member is ready to save a document that's relevant to the team, they would save it in a document library in the team site. All other non-relevant documents would be saved to a different location, outside the team site.

- has *apps* to help a team stay organised. For instance, you can use *lists* to display information pertinent to the team (such as an announcements list to broadcast key information, new tools or resources to team members or a links list to help your team find key information for their jobs), *document libraries* for storing documents that the team can collaborate on, and *timelines*.

- supports *social networking* both within the team and outside of the team, but within the site collection in which your team site is found.

- provides a space for team members to *collaborate* on *documents* (as a result of a team site's social networking capabilities). You can share documents with the whole team by posting them on the team site rather than having to email them to your colleagues. You and other team members can then edit the documents either at the same time or individually at different times.

- provides a space for *team conversation* (as a result of a team site's social networking capabilities). Team members can see who is online, and start or participate in a conversation for the team around an issue that you are trying to resolve.

- enables *automation* for a team's *workflow*. For example, a document may need to go through several steps of approval from different people in the team before it can be considered to be final. By creating a workflow and attaching it to the document, the document will pass automatically to the required people after being approved.

- allows you to use forms to collect information, such as a survey.

- is *secured* by *permissions*. For example, the site's administrator will determine who is a member of the team and what role each member has in a team – such as a contributor, editor, owner etc. They can also add new members as the team grows and delete members as they leave.

How Can A Site Help You?

A team site is a website that provides central storage and collaboration space for documents, information and ideas. A site helps groups of people share information and work together. For example, a team site can help you:

- coordinate projects, calendars and schedules
- discuss ideas and review documents or proposals
- share information and keep in touch with other people
- document your team communications
- access training resources
- make announcements
- share schedules
- facilitate team discussions.

Communication Site vs Team Site

Team sites are workspaces that focus on collaboration and are closely integrated with Office 365 Groups. There are also more options for customising team sites than communication sites. Communication sites are designed to communicate a message to a wide audience. In a team site, most users work together to share or create content, whereas in a communication site, there are a usually a small number of contributors and a large audience.

CREATING A NEW TEAM SITE

You can create a new site either for yourself or to share with others in a group or general members of your workplace. A site is a handy way of keeping related information together such as documents and links to related websites. It is also a great place to discuss ideas about a particular project that you all may be working on.

Try This Yourself:

Before starting this exercise ensure you are signed in to Office 365…

1 Click on the app launcher in the navigation bar, click on the *SharePoint* tile, then click on *Create site* as shown to display the *Create a site…* pane

2 Click on *Team site* to select this option and display the next page

3 Type **Alpheius Finance Team** in *Site name*

We'll leave the default settings as they are for the moment…

4 Click on **[Next]**

You could add owners or members here now, but we will do it later…

5 Click on **[Finish]** to create the new site

You may have to wait a few moments.

Leave this page open for the next exercise

Note that you cannot have more than one site with the same name on the one network.

For Your Reference…

To *create* a *new site*:

1. Click on the app launcher in the navigation bar, then click on the *SharePoint* tile
2. Click on *Create site*
3. Type a name, click on **[Next]**, then click on **[Finish]**

Handy to Know…

- You can always change the title of a site at a later stage if you decide for some reason it is not appropriate.

THE SITE SCREEN

It can be difficult navigating sites when you first begin using them. For that reason it is very important that you have a thorough understanding of the site screen and how to navigate the site before you begin. By default every new site includes a set of *Get started* tiles which provide you with a quick and easy way of navigating to the main features of sites.
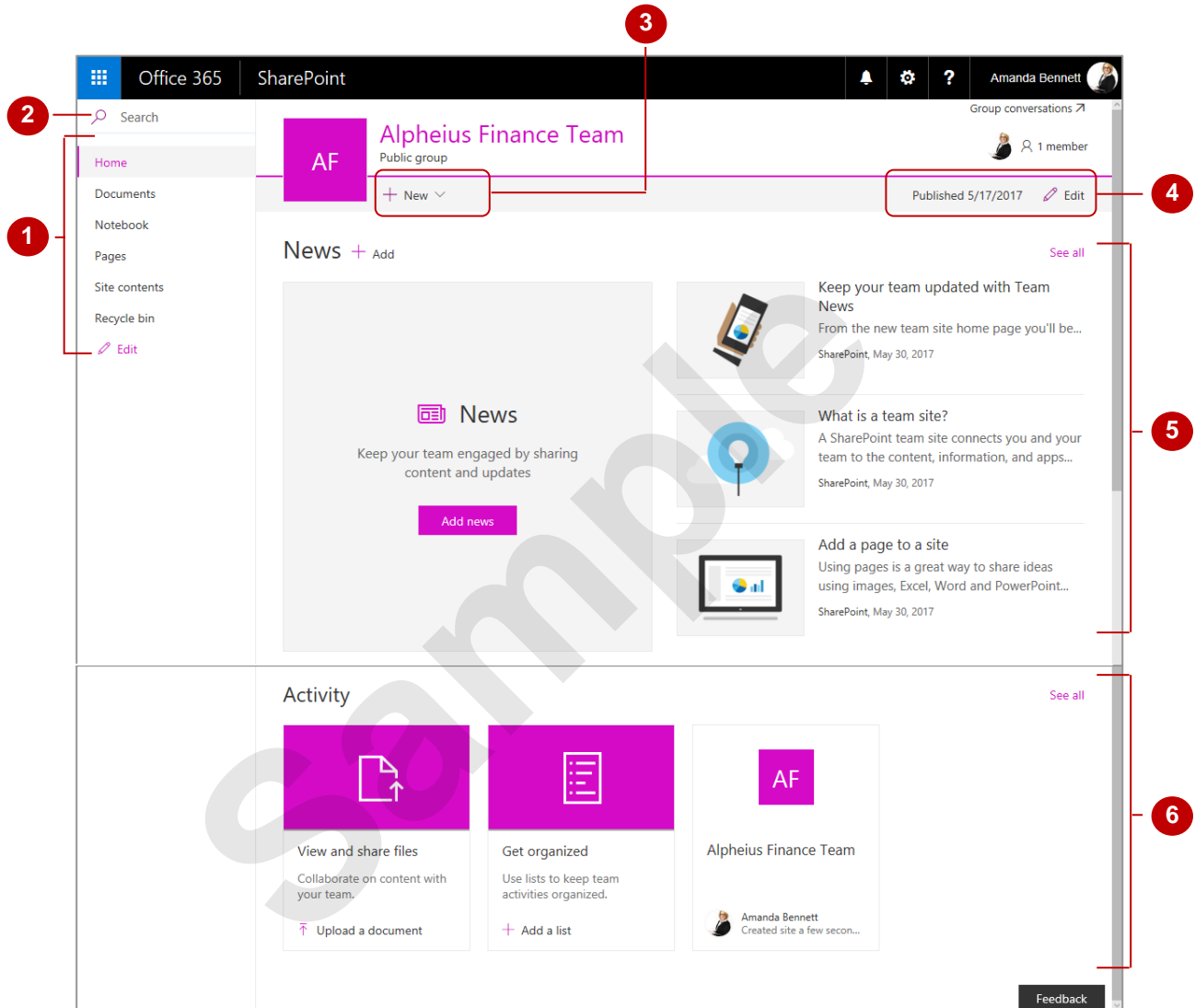
1 The *quick launch* contains links to subsites, pages and apps. You can click on *Edit* to choose which links appear here.

2 Type a search term into the *Search* bar to search the site.

3 Click on *New* and select the required option to create a new list, document library, page or app within the site.

4 Click on *Edit* to edit aspects of the current page such as adding or removing web parts. When you are finished editing, click on *Publish*. The time or date displayed is the last time the site was published.

5 By default, the *News* app appears on the Home page of every site. The *News* app allows you to share content such as updates and other information with members of the site. You can choose to remove the *News* app from the Home page if you don't wish to use it.

6 By default, the *Activity* app appears on the Home page. It lists any changes members have recently made to the site or the content of the site.

NAVIGATING A SITE

The main way of navigating in a site is the *quick launch*. The links that are contained in the quick launch will be determined by the site administrator. The pages on your site also contain links that you can click on to navigate to different areas of your site or access different features.

Try This Yourself:

Before starting this exercise ensure that you have completed the previous exercises in this chapter…

1 In the quick launch click on *Site contents*

This displays all of the contents of your site. Notice the top navigation contains links for Site usage, Site workflows, Site settings and the Recycle bin…

2 Click on *Site Usage* in the top navigation to view the site usage

3 Click on *Back* in the browser window to display the *Site contents* page again

4 Click on *Site Pages* to display the site pages

We have one site page by default and that is the Home page. Notice that Pages is also selected in the quick launch so another way we could have accessed this is to click on Pages in the quick launch…

5 In the quick launch click on *Home* to display the *Home* page again

For Your Reference…

To *navigate* a *site*:

- Click on a link in the quick launch to navigate to the relevant location

### Handy to Know…

- If there is a part of your site that hasn't got a link in the quick launch, click on *Settings menu* > **Site contents** to view and access it.

UNDERSTANDING SITE CONTENTS

If you wish to add apps to a site or find an app or page that doesn't have a link in the Quick launch or top navigation bar then you must navigate to the **Site contents**. The **site contents** contains all of the apps that are available to add to the site you are working on. You can access **Site contents** by clicking on the **Settings** menu and selecting **Site contents**.
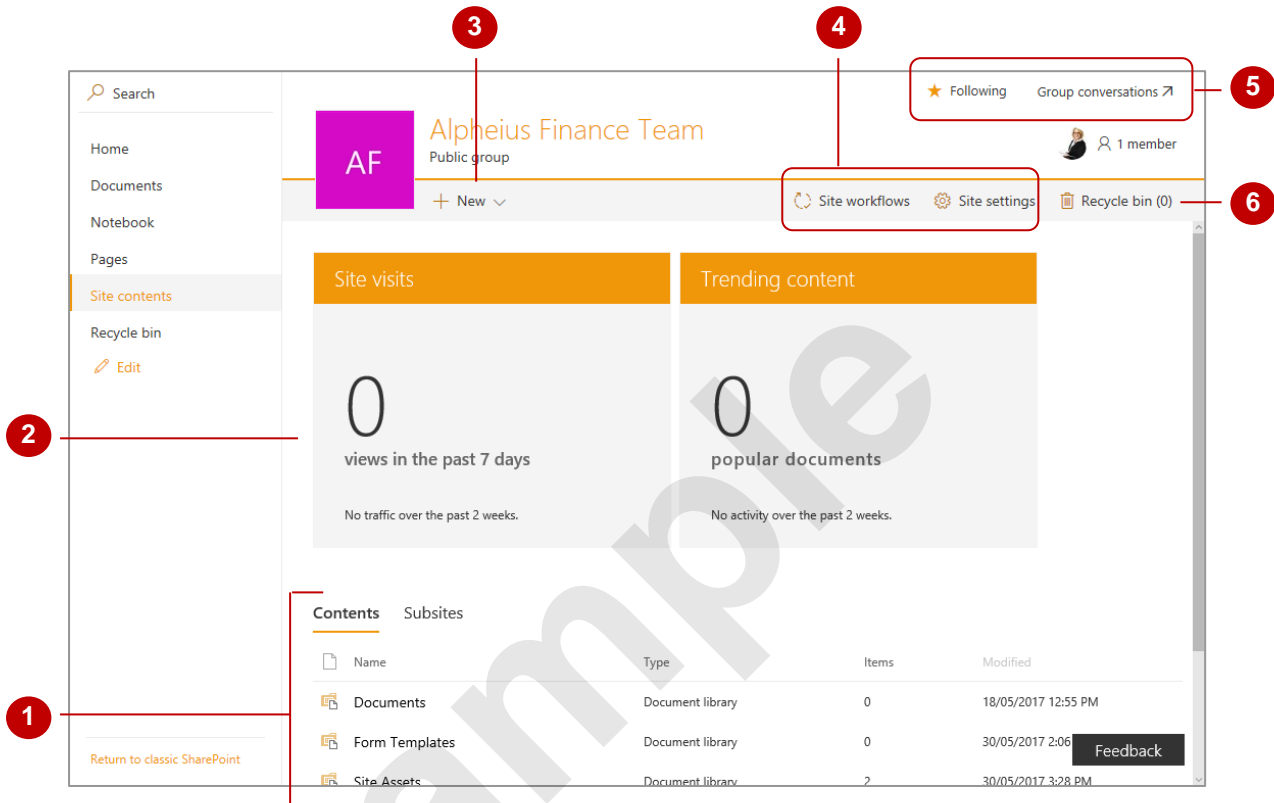
1   Here you can view the **Contents** of the site, such as the files it contains, or the site's **Subsites**.

2   This section displays the **Site visits** tile, where you can see how many people have viewed the site recently, and the **Trending content** tile, where you can see how many documents in the site have been popular over the past couple of weeks.

3   Click on **New**, then select the relevant option to add a new **List**, **Page**, **Document library**, **App** or **Subsite** to the site.

4   **Site workflows** refers to a set of tasks that are created in order to produce a process that leads to a certain result. You can only create a site workflow if you are an administrator. Clicking on **Site settings** navigates to the **Site Settings** page where you can work with all of the elements of the site, such as permissions and site administration.

5   You can follow or unfollow the site by clicking on **Following** or **Not following**. Clicking on **Group conversations** will open a new browser tab displaying the team site's Outlook group and any conversations being held there.

6   The **Recycle bin** contains any apps or items that have been deleted in the active site.

CHANGING THE THEME

When creating or modifying a site, one of the first things you may wish to change is the *look* of the site. This can be achieved very easily and quickly in Office 365. You can change elements such as the layout of the site, colour scheme, font choice and logo.

Try This Yourself:

Before starting this exercise ensure that you have completed the previous exercises in this chapter…

1 Click on **Site contents** in the **Quick launch**

2 Click on **Site settings** in the top navigation

3 Under **Look and Feel**, click on **Change the look**

4 Click on **Orange** to select this 'look'

5 Scroll down if necessary and click on the drop arrow for **Site layout** on the left side of the screen, then select **Oslo** to see a preview of what this layout looks like

6 Repeat step **3** to select the **Seattle** layout again

7 Click on **Try it out** on the right side of the screen above the preview

8 Click on **Yes, keep it** to apply the look to your site

9 Click on **Home** in the **Quick launch** to display the home page of the site

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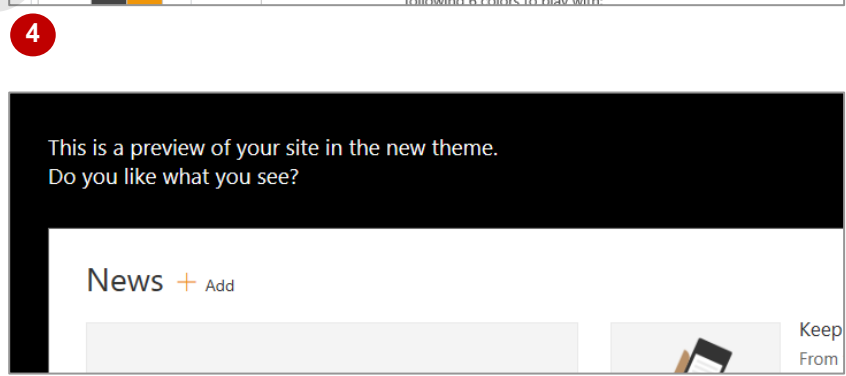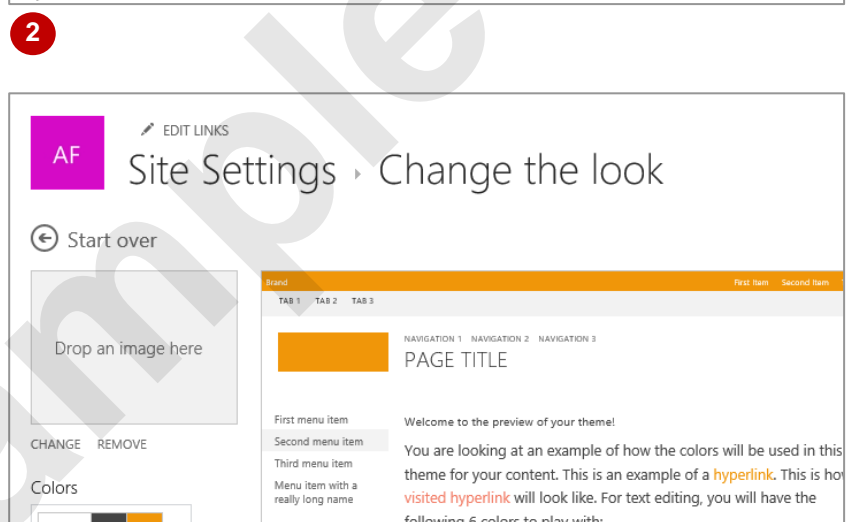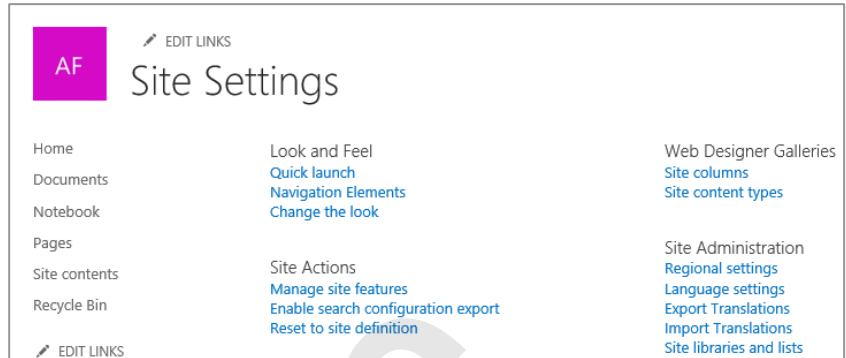
For Your Reference…

To **change** the **look** of a **site**:

1. Click on the **Site contents** in the **Quick launch**
2. Select **Change the look**
3. Choose the settings as required, click on **Try it out**, then click on **Yes, keep it**

Handy to Know…

- You can change the look of a site at any time.

UNDERSTANDING SITE SETTINGS

You can access *Site settings* by clicking on *Site contents* in the *Quick launch*, then clicking on *Site settings*. Everything that you can possibly do with a site is contained in *Site Settings*.

All actions are grouped into specific categories; for instance, *Look and Feel* contains options for modifying elements such as the *Quick launch* and the look of the site.

## Site Settings

The *Site Settings* page provides you with links to pages that allow you to control and manage all aspects of a site. The settings are divided into sections based on what kind of features the settings control. For example:

- The settings in *Look and feel* allow you to work with settings that control how a site appears and how you navigate it.
- *Site actions* contains settings that allow you to work with the search settings and the site definition.
- The *Site Collection Administrators* contains settings that allow you to modify administrative settings for the site collection.
- The *Web Designer Galleries* settings allow you to work with aspects of the site such as site content types.
- The *Site Administration* section contains settings fir modifying administrative settings of the site. The *Search* settings contains links that allow you to modify the search settings for the site such as the result types and the query rules.

Navigating Site Settings

You can navigate the site settings using a navigation feature known as *breadcrumbs*. As shown in the example below, when you click on an option in the *Site Settings* page, a new page is displayed; however, the original page name is still displayed (in this case it is *Site Settings*) and if you point to it you will discover that it's a link. If you click on the link you will navigate back to the *Site Settings* page. This feature is particularly useful if you navigate from one page to another, as using breadcrumbs allows you to 'follow the breadcrumbs' back to where you started.
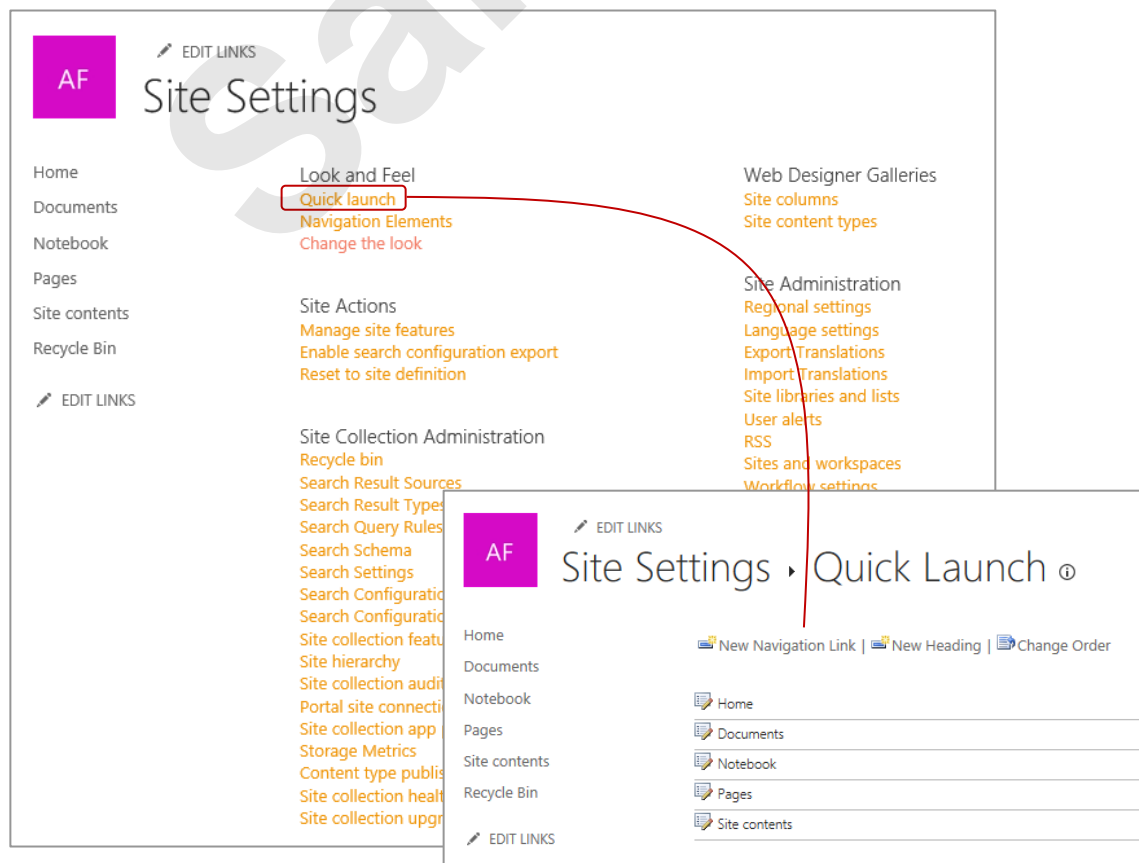
UNDERSTANDING SITE APPS

You can add *apps* to a page within a site in order to increase the sites functionality. An app allows you to perform certain functions based on what the app was designed for. For example, the *picture library* app allows you to add a photo gallery to a page.

Apps – The Basics

In order to understand how sites work and what kind of functionality they can have, you must understand apps. There are many different kinds of apps available for downloading and they are all designed for different purposes. The apps you choose to include in a site will determine the way the site is used.

You can think of apps for sites in a similar way as you might think of apps for your phone or tablet. Just like a phone or tablet app (such as a game or banking app), site apps are small standalone applications that are easy to install, use, manage, upgrade, and remove, and that perform a specific task or meet a particular business need.

For instance, you might have an app on your phone that provides weather information; likewise, you could install a site app on your site that will display the weather for the user's location. Examples of other apps that you might add to your site could include Facebook integration, world clocks, corporate news, event planning, or a shopping cart.

By adding apps to your site, you can customise it with specific functionality or to display particular information thereby enhancing its capabilities.

What Are Apps

This all-encompassing term, *app*, covers anything from the template on which a site is based, the list templates on which the lists are built (e.g. the Calendar list type is known as a Calendar app), and the web parts in a page. Lists and libraries are also classified as apps.

By default, the only apps initially available within a site are the default list and library templates. However, your organisation can purchase apps from the online app store hosted by Microsoft or have the developers in your organisation build and deploy apps to your site to provide additional functionality.

Types of Apps

There are three main types of apps in *Sites*, and they are as follows:

- *Libraries* – such as a document library, form library or wiki page library
- *Lists* – such as a custom list or external list
- *Other* – such as a discussion board, announcements and links.
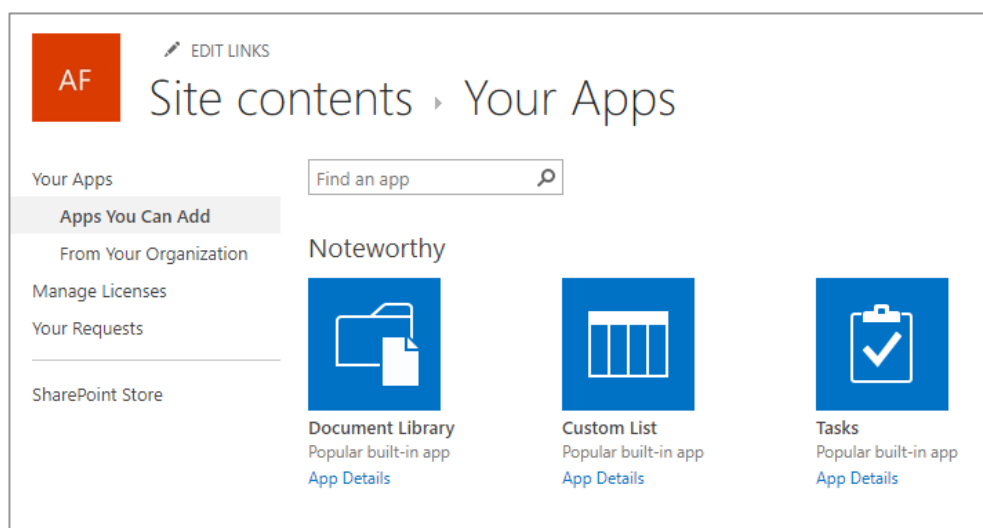

UNDERSTANDING LIBRARY APPS

Library apps are very useful apps. They can be used to manage all media stored in a site including documents, forms, images, videos and web pages. Different types of libraries are available for sites with their main differences being in the types of files that they can store and manage.

Document Libraries

Most people working with sites will work with document libraries, such as the default *Documents* library in a team site (as shown below). You will find at least one document library in nearly every site. Document libraries are so common that they are often referred to simply as libraries.

Document libraries allow you to store, work on and share documents such as Word documents, Excel workbooks, PowerPoint presentations, PDF files, and more. To add files to a document library, you must either upload them or create new files from within a site using the *New*, *Upload* or *Sync* commands in the library. You can also add files by clicking on them in file explorer and dragging them onto the library screen where it says *Drag files here to upload*. Note that each row in the library can hold only one file.
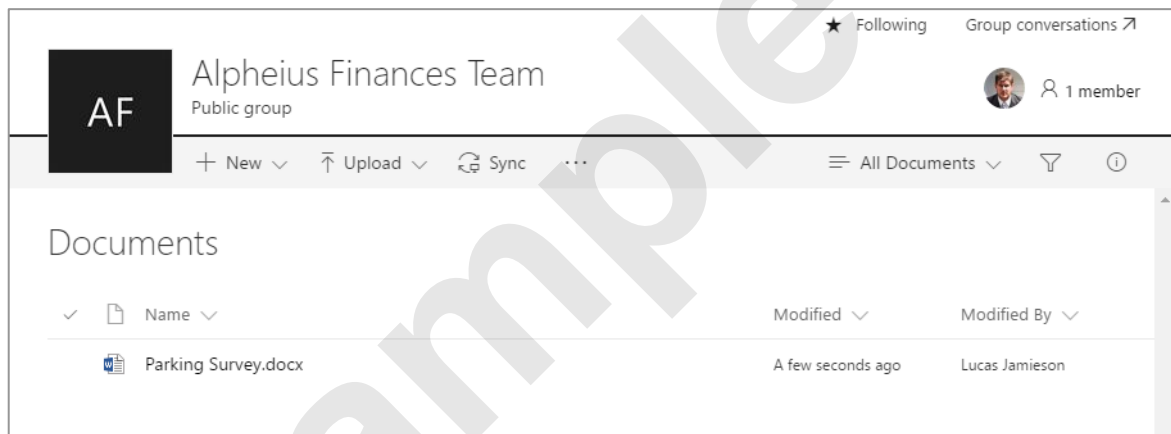
Working With Files

Once a file is selected in the document list, the options to *Edit*, *Manage* or *Share* the file will become available above the list of files. Clicking on *edit* opens the selected file in the default application, clicking on *manage* provides options for working with a file such as viewing properties and version history and clicking on *share* allows you to share the selected file with others.

Adding Libraries

As with all other kinds of apps, you can add a library to a site by navigating to the *Site contents* page, clicking on *New* and selecting **App**. From here you can select the kind of library you wish to create, then create a name for it. The app will be stored on the *Site contents* page.

Accessing Libraries

Just like lists, you can access libraries by clicking on their links in the side navigation bar or in the *Site Content* page if their links aren't included in the side navigation bar. You can also access the contents of a library on a page in your site by inserting a web part that points to the library – for example, the *Documents* library is included in a web part on the home page in a default team site.

UNDERSTANDING LIST APPS

List apps are like simple databases or spreadsheets, making them ideal for storing, presenting and managing information. For example, you can track team events, meetings and appointments in a *Calendar list* or host discussions in a *Team Discussion list*.

Structure Of Lists

A list comprises rows of data where each row is an individual record, known as a *list item*. A list also comprises one or more *columns* (also known as *fields* or *properties*) and it is into these columns that the data is stored for a list item.

For example, look at the sample of a *Tasks list* below. Tasks lists can be created to track work assignments for your team members. This list has four tasks (list items), and each task has data in most of the four columns (such as *Task Name* and *Assigned To*). Lists can be useful for almost anything that can be described by a group of columns.

When you create a new site, Office 365 will add various default lists and document libraries, depending on which template you choose. For example, when you create a *team site*, Office 365 automatically adds a MicroFeed list (which enables users to participate in microblogging via the Newsfeed web app on the home page) and a shared documents library. However, Office 365 makes it particularly easy to add additional apps to your team site by displaying an *Add lists, libraries and other apps* thumbnail which opens a page listing apps that you may wish to add to your site.

As well as adding new default lists, you can modify them (by adding and deleting columns) and even create new custom lists to display any information you desire.

Accessing Lists

You can access lists in your website by clicking on their links in the left navigation bar (as we have done in the above example of our team site) or in the *Site Contents* page if their links aren't included in the left navigation bar.

You can also access the contents of a list on a page in your site by inserting a special building block known as a *web part*, which displays the list or a particular view of that list. For example, if you have created a Contact list in your site, you may decide that this information should appear on your site's home page if all team members need to access this information regularly. You can do this by editing the home page and inserting a *web part* that displays the data in this list. Note that web parts don't actually store the data, they are simply application components inserted in site pages that display the list data.

You can quickly open the list from the web part, if desired, by clicking on the web part's title.