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Ken Withee

*Author of SharePoint 2010 Development
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by Ken Withee

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Ken earned a Master of Science degree in Computer Science studying under Dr. Edward Lank at San Francisco State University. Their work has been published in the LNCS journals and was the focus of a presentation at the IASTED conference in Phoenix. Their work has also been presented at various other Human Computer Interaction conferences throughout the world.

Ken has more than 13 years of professional computer and management experience. He is a Microsoft Certified Technology Specialist and is certified in SharePoint, SQL Server, and .NET.

Dedication

I dedicate this book to two people. The first is my grandma, Tiny Withee, who turns 100 years old this year. The second is my wife and best friend, Rosemarie Withee, who encouraged me daily throughout this time-intensive process. I owe her a rain check for all of the late nights and weekends this book consumed, and I hope to make it up to her over the rest of our lives. I love you!

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Introduction

A centralized web portal has become a necessity in organizations both small and large. An integrated portal provides efficiencies and advantages not seen since the adoption of computers and networks. The value of getting everyone in the organization on the same page and working in unison is instrumental to success. Modern organizations have had to adapt, and the people within them have had to adapt as well. As technology giants fought to get their web portal products to market, one platform has emerged a clear winner: Microsoft SharePoint.

I wish I could say that I foresaw the success of SharePoint back when I first started working with it as a consultant. The fact is that when I was a new consultant, I simply worked on whatever projects were selling. Nearly a decade ago, I stumbled into a small SharePoint project and still haven't emerged from the SharePoint world.

SharePoint 2013 is the latest version of the product and has more fanfare attached to it than any previous version. Microsoft products tend to get better over time. (Some of my friends won't buy a Microsoft product until it's the third version or later.) SharePoint 2013 won't disappoint; it's a very mature and polished product.



The release of SharePoint 2013 ushers in a new strategy for SharePoint Online. No longer do you need to wait a couple of years to use the latest version of SharePoint in the Microsoft cloud. SharePoint Online uses SharePoint 2013, and everything you read about in this book directly relates to SharePoint Online.

If you're already familiar with SharePoint, then this latest version of the product will be familiar, and many of the annoying and painful bugs and interfaces of previous versions have finally been worked out. You no longer need a highly paid consultant to walk you through each aspect of every feature. In a nutshell, things are finally starting to get intuitive. (Although, if you need a consultant, I can recommend a good one.)

Whether you need to create a new website for your team, a new app to store content, or a page to approve and publish critical information, SharePoint 2013 has a solution. SharePoint 2013 is intended to be a self-service environment, and this book helps you get the most out of the platform.

I'm not saying that SharePoint is always easy; in fact, like any enterprise software system, you can expect some frustration. However, if your organization uses SharePoint 2013 or SharePoint Online, you have a wealth of solutions to solve your particular needs.

Who Should Read This Book

This book is intended for anyone who encounters SharePoint or is curious about using the product. SharePoint is a vast product with many nooks and crannies, and no single book can cover all the pieces. This book is designed to provide an introduction and overview of the platform. It shows you how to get the most out of the product, whether you have never used it before or are deeply familiar with specific aspects it.

Others who may benefit from this book include

- ✓ **Developers:** This isn't a development book, but the best SharePoint developers are those who understand the product. The exciting aspect of SharePoint development is that you don't need to write programming code to develop business solutions in SharePoint. If you can work with a web browser to develop a web presence in a site like Facebook or LinkedIn, then you can develop and administer your own SharePoint site.
- ✓ **IT professionals:** This isn't a book that explains how to set up a SharePoint server farm. However, this book helps you understand what features your end users may want to see in a SharePoint farm that you architect or support.
- ✓ **Managers:** If you manage a department or business unit, you need to understand how to get the most out of SharePoint. If your company has made significant investments in SharePoint deployment, it'd be a shame if you didn't know how to leverage that investment.

How to Use This Book

This book is a *reference*: You don't have to read it cover to cover. Because many of the features in SharePoint are dependent on other features, I point you to related chapters in the book when appropriate.

Foolish Assumptions

Because SharePoint is such a huge topic, I have to make some assumptions about your configuration and starting knowledge, such as

- ✓ **You have access to some version of SharePoint 2013.** If you don't have access to SharePoint, then sign up for SharePoint Online. After the free trial period, it costs as little as \$5 a month. If you want to see all the specific things that come with the On Premises version of the product, then there is a trial license available for 30 days. Just download it from the Microsoft download center and get started.
- ✓ **You're a contributor or administrator.** Of course, many of the scenarios in this book require only that you be a contributor. So long as you know who your administrator is, you can ask that person for elevated permissions. And if you want to be master of your own SharePoint universe as an administrator, you can sign up for SharePoint Online and control all aspects of your SharePoint environment in a fairly intuitive interface.
- ✓ **Ideally, you have a sandbox or test environment where you can try different scenarios.** It isn't the best strategy to lock down security on your Human Resources site only to find out nobody in your entire organization can get to their pay stub. You need a test environment or test site where you can play around with SharePoint, and then take that knowledge to your department site. Luckily, if you have access to SharePoint, you have your own personal My Site that you can explore. Another alternative is to use SharePoint Online (yes, you can buy a single license).
- ✓ **Many of the scenarios in this book assume your implementation includes My Site.** Unfortunately, many companies try to avoid using this feature. In SharePoint 2013, My Site is an integral component for many features. I strongly advise utilizing My Site.

How This Book Is Organized

This book groups related SharePoint topics in parts. Each part covers a different aspect of getting the most out of SharePoint.

Part I: Getting Started with SharePoint 2013

This part of the book covers all the fundamentals of SharePoint. This material covers the basics such as understanding the technology stack that makes up SharePoint, getting familiar with SharePoint Online and the cloud, and wrapping your head around the vast features in SharePoint.

Part II: Diving Headfirst into SharePoint 2013

In Part II, I show you how to use SharePoint. You discover how to create a site, add web pages and web parts, and create and customize apps.

Part III: Becoming a SharePoint Administrator

In this part, I discuss how SharePoint administration is accomplished right from the web browser and how most people are administrators in some fashion. Topics include gaining familiarity with the Site Settings page, configuring site navigation and SharePoint features, and making your site your own by changing the look and feel.

Part IV: Getting Social and Going Mobile

In this part, I show you how to use SharePoint to connect with others and take SharePoint on the road. You find out how to build your visibility using your personal profile; how to reach out and connect with others using microblogging, feeds, alerts, mentions, ratings, and likes; and how to use SharePoint from your mobile device (smartphone or tablet).

Part V: Managing Enterprise Content

Managing content is at the heart of a modern organization. In this part, I walk you through sharing and approving content, finding content with search, and archiving documents and records. Finally, I also show you how to use workflow to integrate and optimize your business processes.

Part VI: Office 365 and SharePoint Online

In Part VI, I cover the cloud version of SharePoint that is part of a bundle of cloud products called Office 365. SharePoint Online is an exciting offering because Microsoft handles the infrastructure and you can simply sign up and begin using SharePoint over the Internet. In addition, SharePoint Online is as inexpensive as \$4 per month! In this part, you see how to create a public-facing website and a partner-only site, all using SharePoint Online.

The important thing to keep in mind is that SharePoint Online and SharePoint 2013 are the same thing. SharePoint Online is just Microsoft hosting SharePoint for you. When you use SharePoint Online, you're using SharePoint 2013, and so everything discussed throughout this book is relevant.

Part VII: The Part of Tens

In this part, I share some parting words of wisdom in the form of top ten lists: Ten ways to govern SharePoint so that it doesn't turn into the Wild West of web portals, and ten ways to further your SharePoint journey and become a guru.

Icons Used in This Book



You find a handful of icons in this book, and here's what they mean:

Tips point out a handy shortcut, or they help you understand something important to SharePoint.



This icon marks something to remember, such as how you handle a particularly tricky part of SharePoint configuration.



This icon is my chance to share with you details about the inner workings of SharePoint. Most of the information you find here pertains to some aspect of SharePoint that requires configuration at the server. That means you can point out the stuff beside this icon to IT and ask IT to make SharePoint do that.



Although the Warning icon appears rarely, when you need to be wary of a problem or common pitfall, this icon lets you know.

Where to Go from Here

All right, you're all set and ready to jump into this book. You can jump in anywhere you like — the book was written to allow you to do just that. But if you want to get the full story from the beginning, jump to Chapter 1 — that's where all the action starts. (If you are already familiar with SharePoint you might want to flip ahead to Chapter 2, where you can get your hands dirty with creating a site and developing it to fit your needs.)

Occasionally, we have updates to our technology books. If this book does have technical updates, they will be posted at www.dummies.com/go/sharepoint2013fdupdates.

Part I

getting started with **SharePoint** **2013**



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In this part . . .

- ✓ Get familiar with SharePoint as a product and platform. SharePoint is a complicated beast and most people use only a smidgen of it.
- ✓ Dive into a quick intro into what makes up the SharePoint Online product and get a handle on the buzzwords around SharePoint.
- ✓ Get your head around the vastness of SharePoint by exploring some of its functionality at a high level.

Chapter 1

Getting to Know SharePoint 2013

In This Chapter

- ▶ Gaining a general understanding of SharePoint
 - ▶ Exploring how the product is put together
 - ▶ Getting familiar with SharePoint concepts
 - ▶ Seeing how SharePoint works at a fundamental level
-

When I first heard about SharePoint, I just didn't get it. What the heck was this new thing called SharePoint? I knew it was a Microsoft product that was supposed to do lots of things, but I just couldn't figure out exactly what it was or how to get started working with it.

Well, after years of working with SharePoint, I have finally figured a few things out. SharePoint is indeed a Microsoft product and it is definitely capable of doing lots of things. In fact, SharePoint can do more things than you could ever imagine. And therein lies the problem. If you ask ten people what SharePoint does, you're very likely to get ten different answers. SharePoint has such a depth to it that it's hard to get your head around it.

In this chapter, I help you see the SharePoint big picture. You discover how SharePoint works and gain understanding on exactly what the term *SharePoint* means. This chapter peels away the mystery and shows you SharePoint at a basic level. After all, you need to understand SharePoint at a basic level before you can dive into its advanced functionality.

Wrapping Your Head around SharePoint

At a basic level, SharePoint is a *web-based software platform*, meaning that SharePoint is software designed for you to interact with using a web browser.



In past versions of SharePoint, you really needed to use Microsoft Internet Explorer to work with SharePoint. Times have changed though, and you can now use most any web browser to work with SharePoint.

No, really, what is SharePoint?

Maybe you're a whiz at Word or a spreadsheet jockey with Excel. Going forward, you're going to have to be just as good at SharePoint to get the most out of your desktop Office client applications. Microsoft continues to integrate functionality that used to be locked up in client applications, or not available at all, with SharePoint. For example, using SharePoint 2013 with Office 2013, you can create an online gallery of PowerPoint slides, display interactive spreadsheets in web pages, or reuse information from your company's databases in Word documents. You can even use Visio 2013 to automate your business processes using SharePoint.

Officially, Microsoft represents SharePoint 2013 as a "business collaboration platform for the enterprise and web." *SharePoint* is a platform from Microsoft that allows businesses to meet their diverse needs in the following domains:

- ✓ **Collaboration:** Use SharePoint's collaboration sites for activities, such as managing projects or coordinating a request for proposal.
- ✓ **Social networking:** If you work in a large company, you can use SharePoint as a social network for the Enterprise experience to help you track coworkers and locate people in expertise networks.
- ✓ **Information portals and public websites:** With SharePoint's web content management features, you can create useful self-service internal portals and intranets, or you can create visually appealing websites that are actually easy for your business users to maintain.
- ✓ **Enterprise content management:** SharePoint offers excellent document- and record-management capabilities, including extensive support for metadata and customized search experiences.
- ✓ **Business intelligence:** SharePoint is an ideal platform for providing entrée into your organization's business analysis assets. You can use insightful dashboards that allow users to get the big picture at a glance and then drill down to get more detail.
- ✓ **Business applications:** Use SharePoint to host sophisticated business applications, integrate business processes' backend databases and your SharePoint content, or simply use SharePoint as the means to present access to your applications.

The functionality I discuss in the preceding list is delivered by two editions of the product and one online cloud service:

- ✓ **SharePoint Foundation 2013** is the underlying software platform that delivers all the building-block functionality of SharePoint. That includes apps, web pages, websites, and alerts. SharePoint Foundation is licensed as a Windows Server component. In other words, as part of a properly