



Creating a Teamsite in SharePoint 2013

Table of Contents

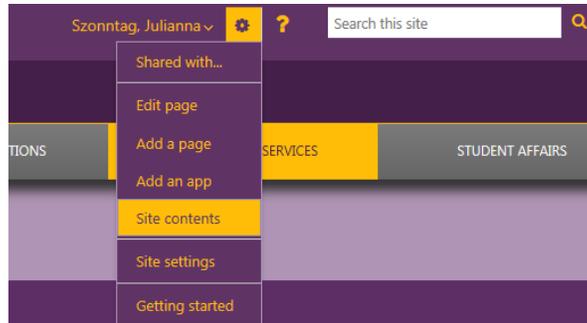
Creating a Teamsite	1
Create a Site Based on a Template	1
Converting the New Site to the Branded Template.....	5
Permissions	6
Adding Users to a SharePoint Permission Group.....	10
Editing User Permissions.....	12
Editing the People and Groups Page Drop Down List.....	12
Check Permissions Tool.....	14
Edit Page	14
Editing Ribbon.....	15
Inserting Text	16
Inserting Pictures	16
Inserting Web Parts.....	16
Inserting a Hyperlink.....	17
Creating a Document Link.....	19
Customizing the Quick Launch Bar	19
Editing the Quick Launch Bar	20
Headings and Links.....	21
Adding a Home Link	21
Adding a Heading that Nests Links.....	22
Adding a Link.....	22
Ordering Headings and Links	23
Editing or Deleting a Heading or Link.....	23
Recycle Bin	23

Creating a Teamsite

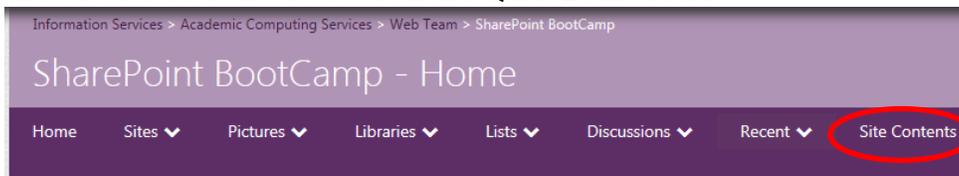
A teamsite is a site that includes collaborative content that is used to store team documents, plan projects and coordinate tasks.

Create a Site Based on a Template

1. Click on the Gear Icon located at the top of the site window and select Site contents from the drop down list.



2. Or click on Site Contents located on the Quick Launch bar.



3. Scroll to the bottom of the window and click on the new subsite link.

[new subsite](#)

[Basic Training](#)

Modified 3 months ago

[Web Parts](#)

Modified 3 months ago

4. Give your site a title.
5. You can add a description but this is not necessary.
6. Enter a URL for the site. **NOTE:** When entering the URL you only need to specify what the site name (last portion of the URL) will be. SharePoint will automatically generate the first portion of the URL. Keep the URL short do not use spaces, use hyphens instead; acronyms work best.
7. Under Select a template make sure that the Custom tab is selected and wcuSiteTemplate is highlighted.
8. Under User Permissions you can select:
 - Use same as parent site if you want the teamsite to have the same permissions as the parent.
 - Use unique permissions if you want your site to have its' own permissions. By selecting this option new groups will automatically be created for your site.
 - **Note:** You can change the site permission inheritance later.

9. Use the top link bar from the parent site? Leave the default as No. Since SharePoint 2013 is using a branded template the top link bar cannot be edited and the site will always inherit from the parent no matter if Yes or No is selected.
10. Click Create.

New SharePoint Site

Home Sites Pictures Libraries Lists Discussions Recent Site Contents

Title and Description

Title:

Description:

Web Site Address

URL name:

Template Selection

Select a template:

[Collaboration](#) [Enterprise](#) [Publishing](#) [Custom](#)

Permissions

You can give permission to access your new site to the same users who have access to this parent site, or you can give permission to a unique set of users.

User Permissions:

Use same permissions as parent site
 Use unique permissions

Note: If you select **Use same permissions as parent site**, one set of user permissions is shared by both sites. Consequently, you cannot change user permissions on your new site unless you are an administrator of this parent site.

Navigation Inheritance

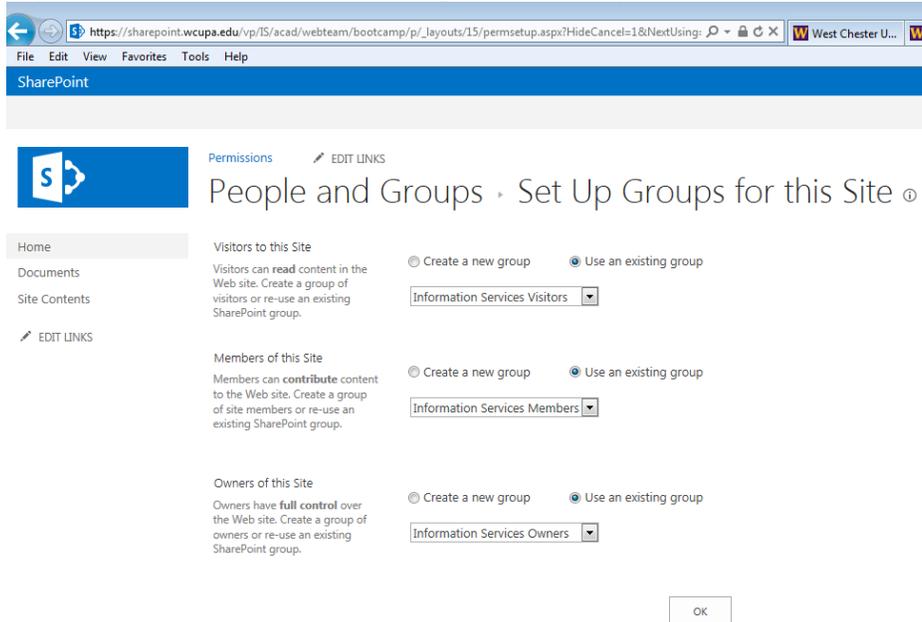
 Use the top link bar from the parent site?

Yes No

Create

Cancel

11. If you selected Use Unique Permissions the following window will appear. The groups that appear in the box are the default groups of the parent site.



https://sharepoint.wcupa.edu/vp/IS/acad/webteam/bootcamp/p/_layouts/15/permssetup.aspx?HideCancel=1&NextUsing: West Chester U...

File Edit View Favorites Tools Help

SharePoint

Permissions EDIT LINKS

People and Groups - Set Up Groups for this Site

Home Documents Site Contents EDIT LINKS

Visitors to this Site
Visitors can **read** content in the Web site. Create a group of visitors or re-use an existing SharePoint group.

Create a new group Use an existing group

Information Services Visitors

Members of this Site
Members can **contribute** content to the Web site. Create a group of site members or re-use an existing SharePoint group.

Create a new group Use an existing group

Information Services Members

Owners of this Site
Owners have **full control** over the Web site. Create a group of owners or re-use an existing SharePoint group.

Create a new group Use an existing group

Information Services Owners

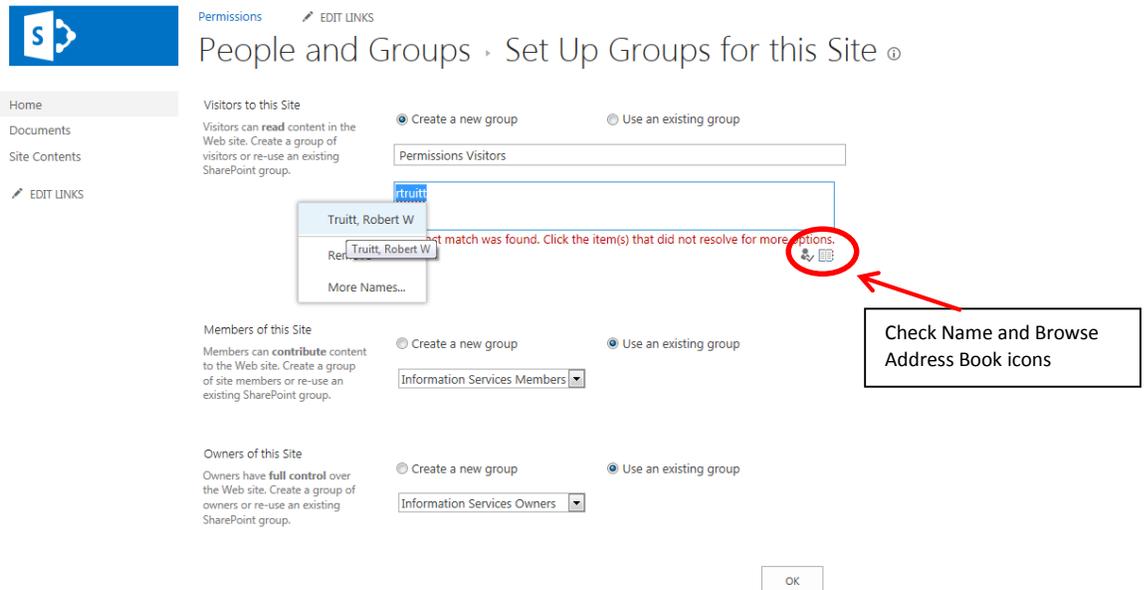
OK

12. To create new groups click on Create a new group. A new group is created with the team site name.

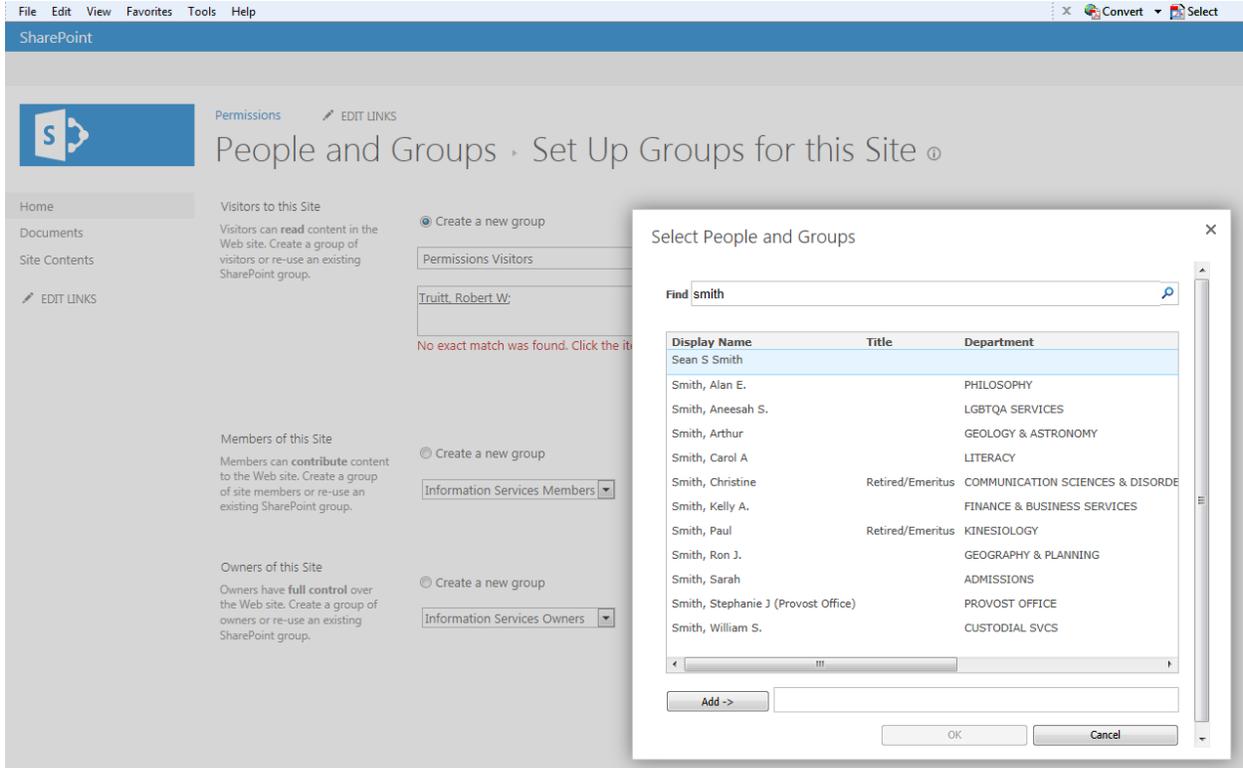
13. You can begin adding users to the group by typing their username into the window or searching for it in the global address list.

- Click on the Check Name icon to verify that the name was entered correctly.
- If you receive a no exact match was found error click on the name and resolve it by selecting the correct entry from the drop down list.

- If a no results found error appears or there is no drop down list to select from, enter the name using the following format: **passhe\75username;** (make sure you enter a semicolon after the username) then hit enter. The name will resolve.



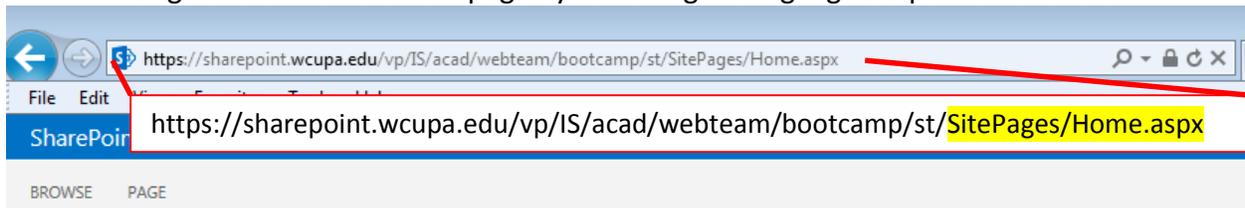
- The name is resolved when it is underlined.
- You can also search for a name by browsing the address book.
- You can add more than one name by inserting a semicolon between each name.



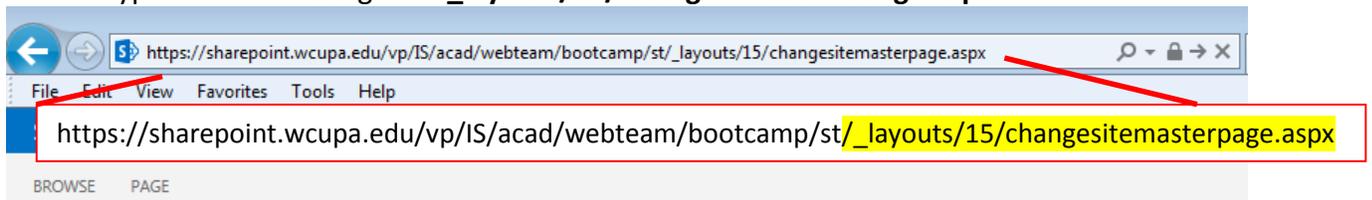
14. Repeat these steps for the Members group and the Owners group.
15. Click Ok when finished.

Converting the New Site to the Branded Template

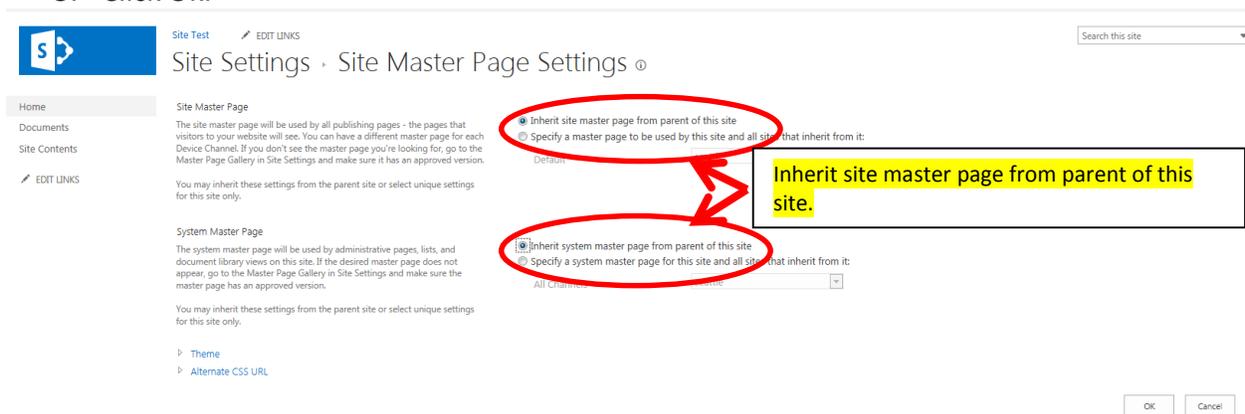
1. After the site has been created you need to convert the page to the branded master template.
2. Change the URL on the new page by removing the highlighted portion of the URL.



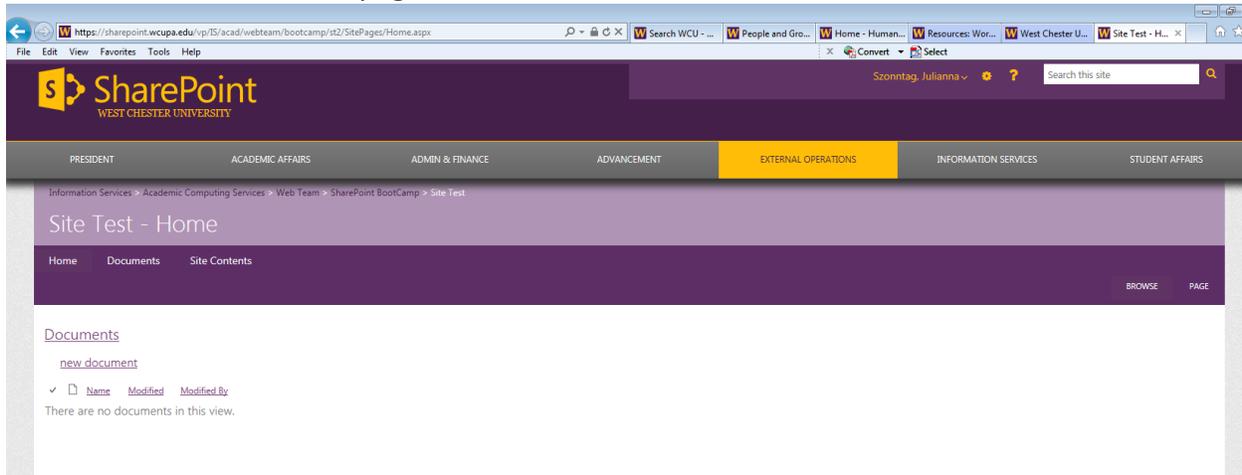
3. Type in the following text: **_layouts/15/ChangeSiteMasterPage.aspx**



4. Click the radio buttons next to **Inherit site master page from parent of this site** and **Inherit system master page from parent of this site**.
5. Click Ok.



6. Your new team site page should look like this.



Permissions

A permission level is a combination of SharePoint permissions. Permission levels specify which permissions users have for a site or list, and therefore whether people can view, change, or manage a site. By default, SharePoint pre-defines some permission levels. You have the option to give your teamsite unique permissions, i.e. different from the parent site. You can create new SharePoint groups or re-use existing SharePoint groups. **Note:** *Best Practice for granting permission to users is to add them to a SharePoint group, not to give the user access directly to a site. It is much easier to maintain groups across multiple sites than to maintain individual users across multiple sites.*

Default Permission Levels:

Read: Can view pages and items in existing lists and document libraries. Can download documents. This permission level is usually assigned to the Visitors group.

View Only: View pages, items, and documents. Any document that has a server-side file handler can be viewed in the browser but not downloaded. This permission level is usually assigned to the Visitors group.

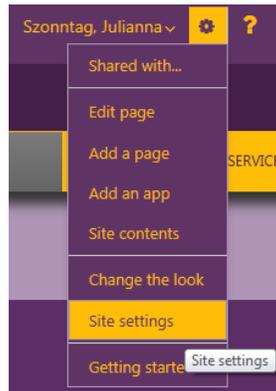
Contribute: View, add, update, and delete list items and documents. This permission level is usually assigned to the Member Group.

Full Control: Contains all available SharePoint permissions. By default, this permission level is assigned to the Owners group.

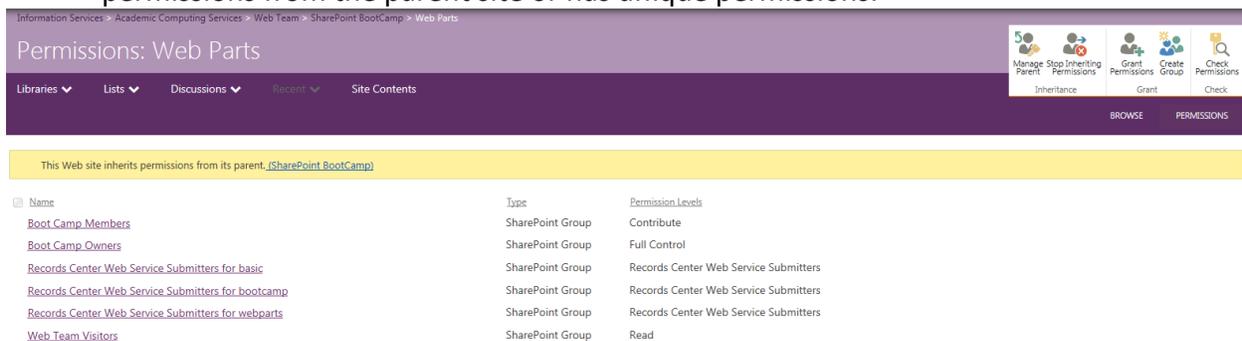
Accessing the Permissions Page

You can access the permission page from the Site Settings Page:

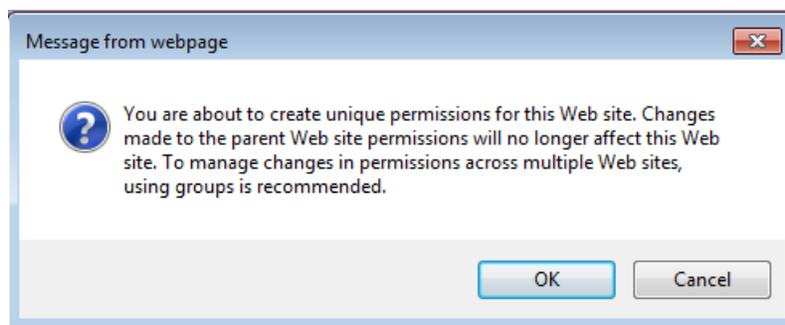
1. Click on the Settings Gear icon at the top of the page and select Site Settings from the drop down list.



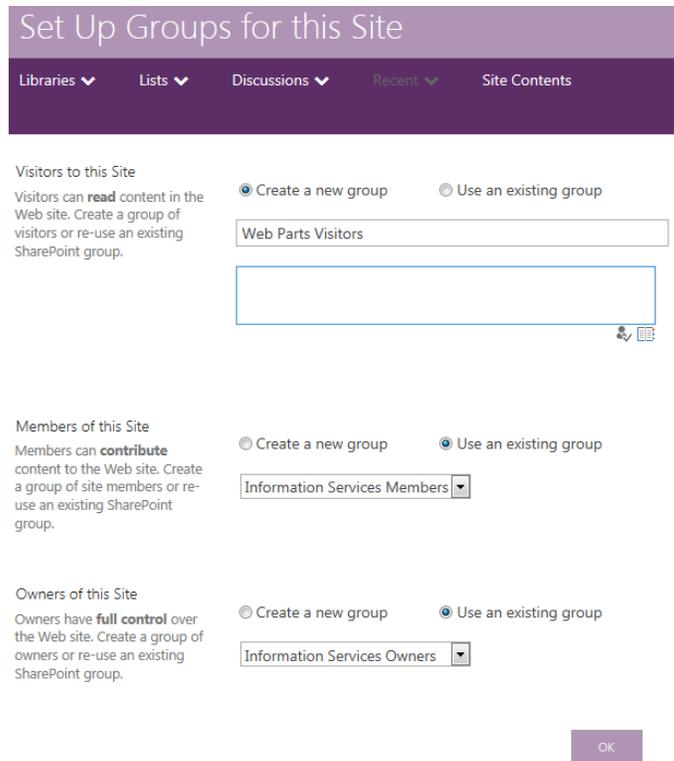
2. Under the Users and Permissions group select Site Permissions.
3. The yellow bar that appears under the Quick Launch bar indicates if the site inherits permissions from the parent site or has unique permissions.



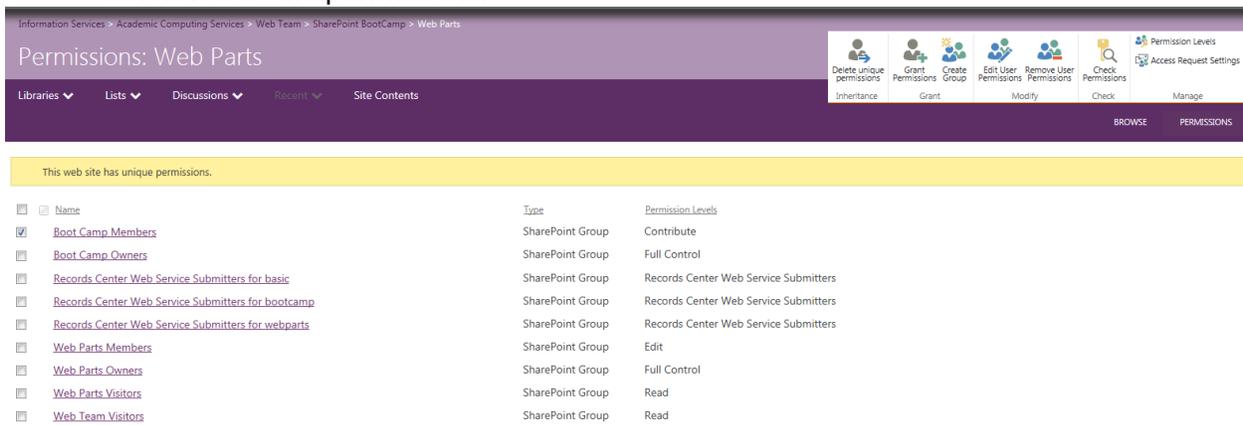
4. To stop inheriting permissions and create unique permissions click on Stop Inheriting Permissions on the ribbon.
5. A warning window appears indicating you are about to create unique permissions. Click Ok.



6. A Set Up Groups for this site window appears.
7. You can create new groups here or select a group from the drop down menu.
8. Click on Create a new group and SharePoint automatically creates the group for you.
9. You can begin adding names to the groups in the same way as shown on pages 3 and 4.
10. Click Ok when finished.



11. Click on the Settings Gear icon and select Site Settings from the drop down menu.
12. Under the Users and Permissions group select Site Permissions.
13. The yellow information bar should now read: This web site has unique permissions. You can now edit the permissions.



14. To remove a SharePoint group click in the box next to the group name and click on Remove User Permissions on the ribbon.
 - **Note: make sure you do not remove your permissions as the owner of the site.**
15. To grant permissions click Grant Permissions on the ribbon and add a group name or username. Remember it is better to add users to a group than to give them direct access to a site.
16. Click on the Show Options link to expand the options.

Invite people to 'Edit'

Enter names, email addresses, or 'Everyone'.

Include a personal message with this invitation (Optional).

[SHOW OPTIONS](#)

Share Cancel

17. To grant a SharePoint group permission to your site type the name of the group in the enter names window. As soon as you begin typing, group names will start to populate.
18. Select the group name by clicking on it.

Invite people to 'Edit'

Infor

Information Services Members
Information Services Owners
Information Services Visitors
Information Technology Accessibility Mem
bers

Optional).

HIDE OPTIONS

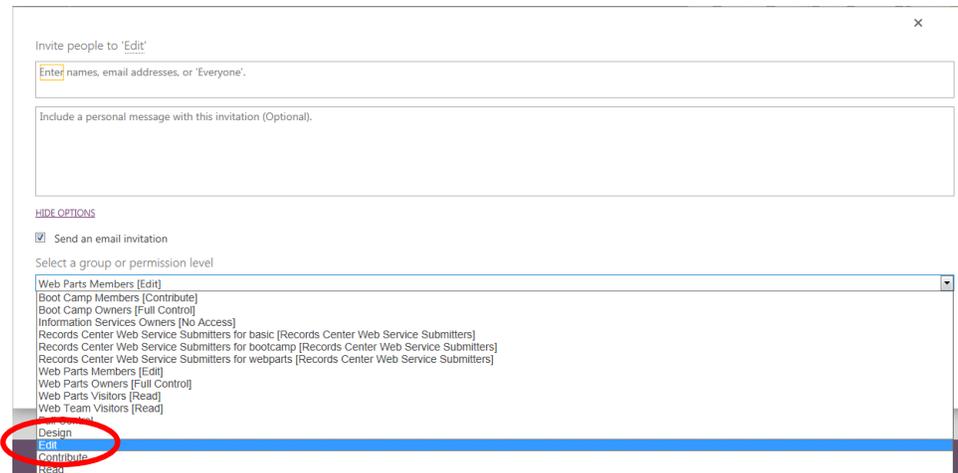
Send an email invitation

Select a group or permission level

Web Parts Members [Edit]

Share Cancel

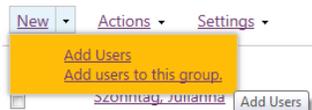
19. To assign a permission level to the group click on the drop down arrow under Select a group or permission level.
20. Send an email invitation is checked by default. This option sends an automated email with a link to the SharePoint site to the individuals that you granted permission to after you click on Share. **Note:** If you are granting the WCU All Employees group access to your site then you will need to uncheck this box before you click on Share. You do not have permission to send emails to this group.
21. When you are finished granting permissions click on Share.



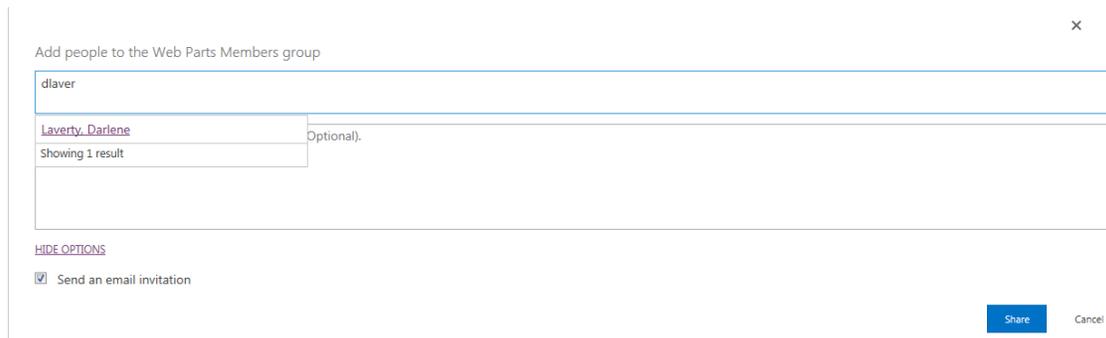
Adding Users to a SharePoint Permission Group

You can add users to a SharePoint group 2 ways: from the Site Settings page or from the People and Groups page (go to page 11 for the People and Groups page instructions).

1. Click on the Settings Gear icon and select Site Settings.
2. Under the Users and Permissions group select Site Permissions.
3. Click on the group that you would like to add a user to.
4. Click on New and click on Add users to this group.



5. In the Add people to the Group box type in the person's username. Names will begin to populate similar to what you are entering. Click on the corresponding name from the drop down list.



6. If a no results found error appears or the name becomes underlined in red enter the name using the following format: **passhe\75username;** (make sure you enter a semicolon after the username) then hit enter. The name will resolve.

- Click Show Options if you would like to send an automated email to the user; uncheck if you do not.
- Click Share.

Add people to the Web Parts Members group ×

passhe\75blinton

No results found (Optional).

[HIDE OPTIONS](#)

Send an email invitation

[Share](#) [Cancel](#)

Add people to the Web Parts Members group ×

Linton, Beverly J. x

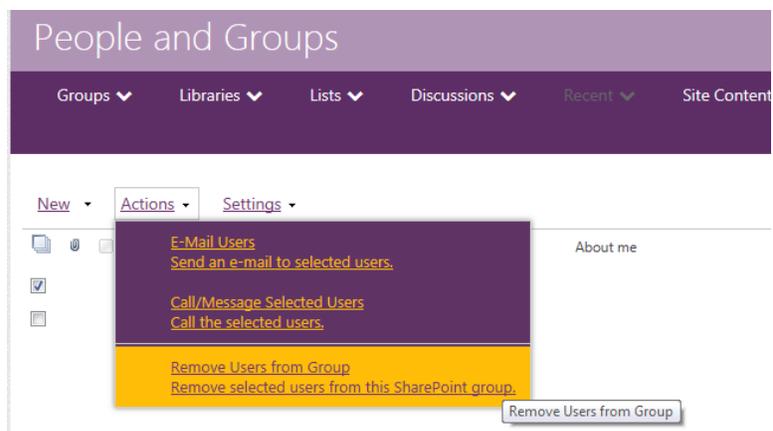
Include a personal message with this invitation (Optional).

[HIDE OPTIONS](#)

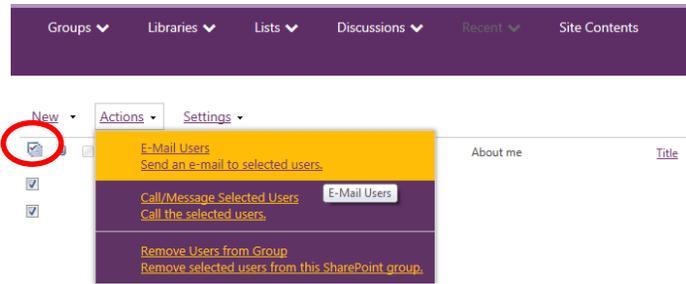
Send an email invitation

[Share](#) [Cancel](#)

- The name will appear in the group list.
- To remove an individual or individuals from a group check the box next to their names click on the Actions drop down and Select Remove Users from Group.

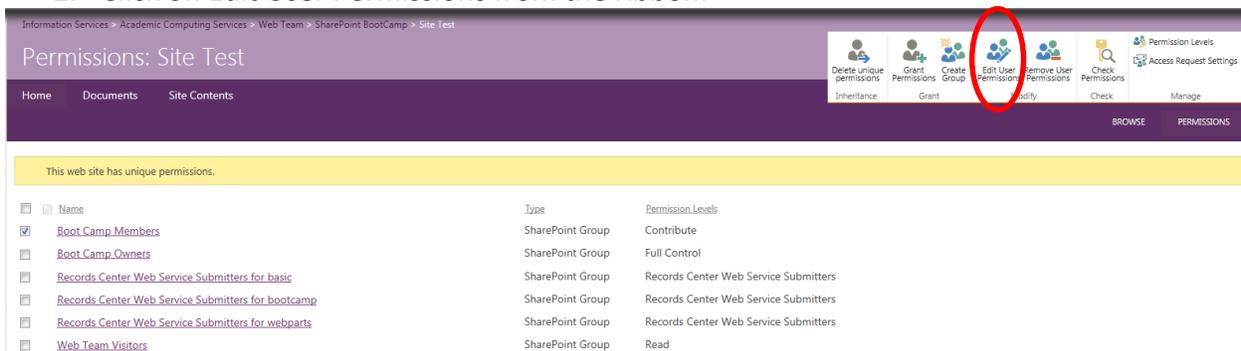


- You can send an email to the group from this drop down as well.
- Select all the users in the list.
- Click on the Actions drop down and select E-Mail Users.

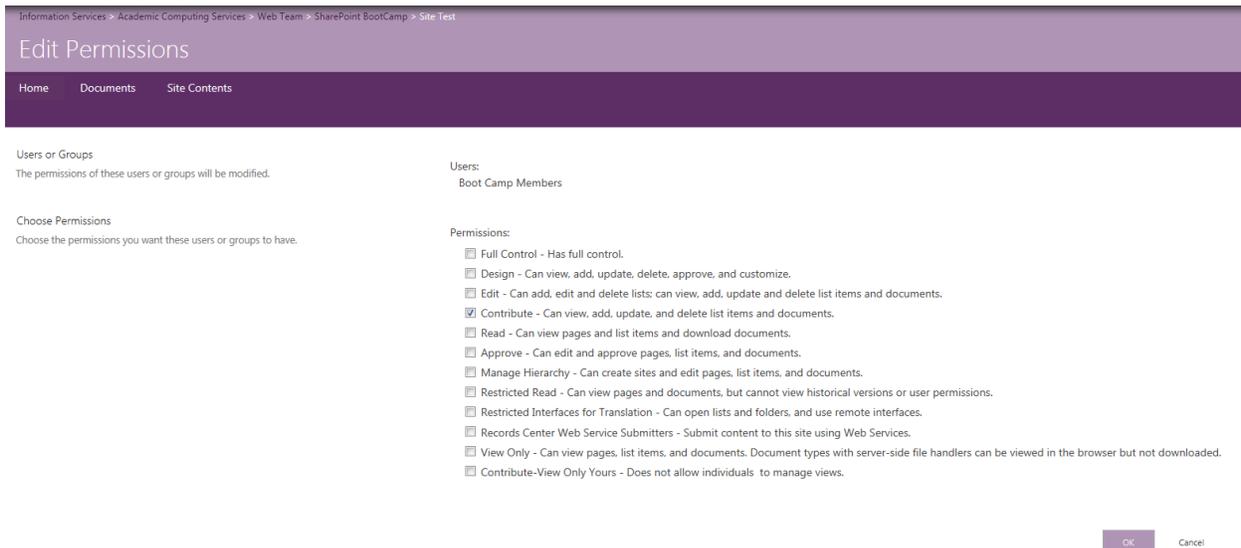


Editing User Permissions

1. Select a group or user from the Site Permissions page.
2. Click on Edit User Permissions from the ribbon.



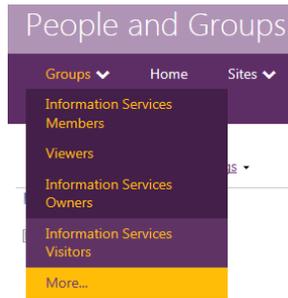
3. Select the permission level from the list.
4. Click Ok.



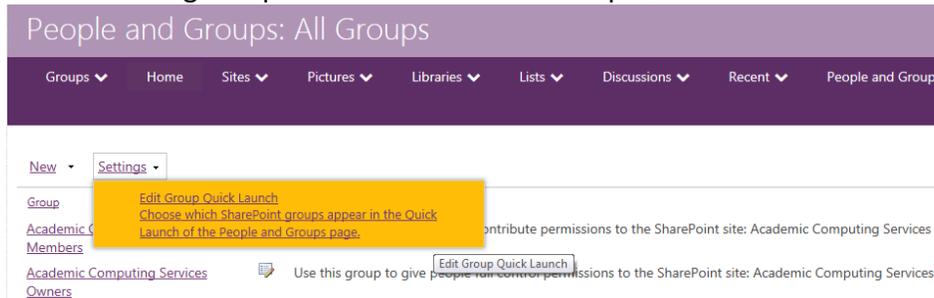
Editing the People and Groups Page Drop Down List

1. Click on the Settings Gear icon and select Site Settings from the drop down list.
2. Under Users and Permissions select People and Groups.

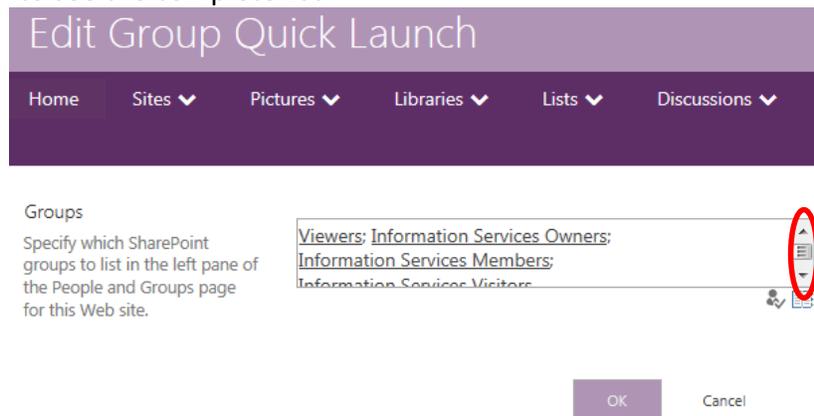
- The default group for the site will appear on the page.
- Click on the Groups drop down and select More.



- Click on the Settings drop down and click Edit Group Quick Launch.



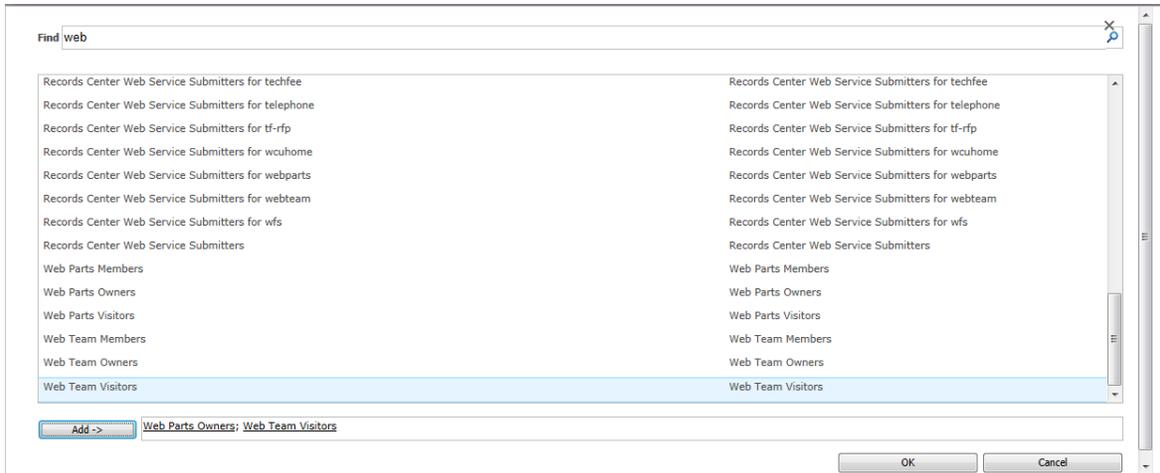
- This window shows the list of groups that currently appear in the Quick Launch. Use the scroll bar to see the complete list.



- To remove a group highlight the group name and click the backspace button on the keyboard.
- To add a group to the list type the name of the group. **Note:** group names are separated by a semicolon. Click on the check name icon to verify the name. If you are not sure of the exact spelling of the group name click on the browse icon and search for the name.



- Select the group from the list, click Add.
- You can add more than one group at a time.
- Click Ok.



12. To add a user to a group click on the Group drop down list and select a group.
13. Click on New and select Add user to group.

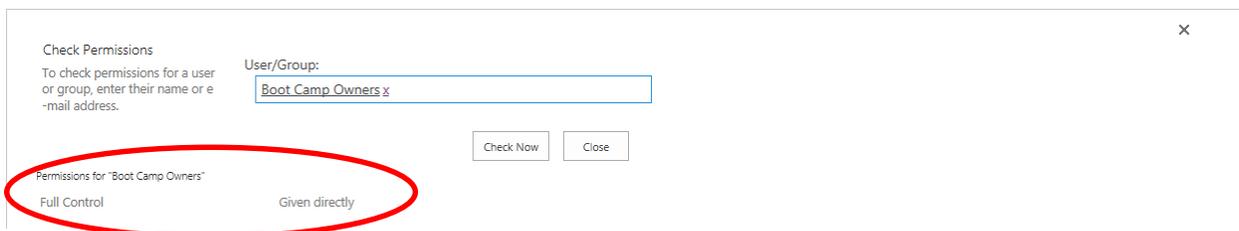
Check Permissions Tool

The Check Permission tool will evaluate what permission a particular user or group has. To view the permission levels:

1. Open the Permissions page.
2. Click on the Check Permissions icon on the Ribbon.



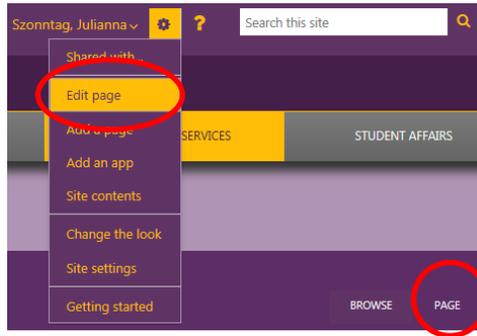
3. Enter the username or group name and click Check Now. A window will appear listing all the permissions for that particular user or group.



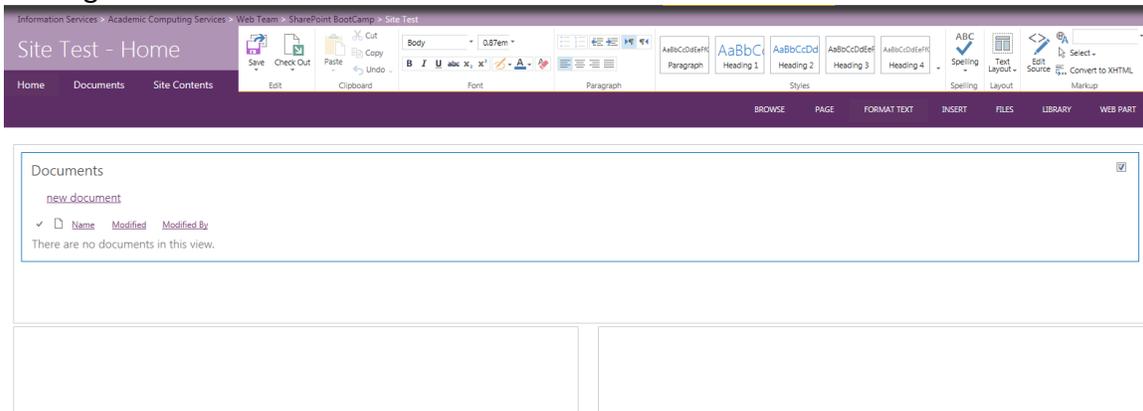
Edit Page

The Edit Page option allows you to customize the page by adding web parts, images, text, etc. You can begin editing 2 ways:

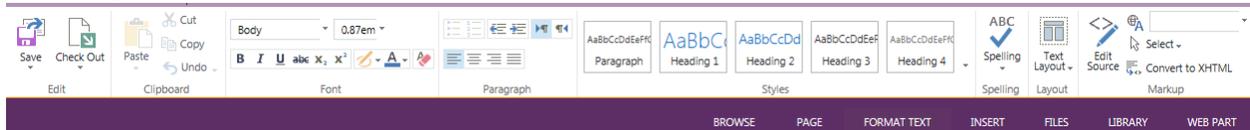
1. Click on the Settings Gear and select Edit page or...
2. Click on the Page tab on the ribbon.
3. Click on the Edit button.



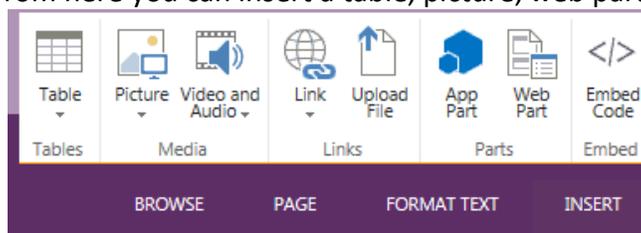
4. Page in Edit mode.



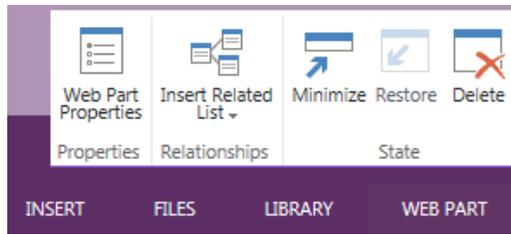
Editing Ribbon



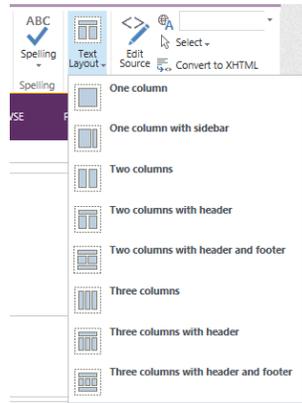
1. The ribbon gives you several options to choose from.
 - Format text: from here you can change the text font, text color, align text, etc.
 - Insert: from here you can insert a table, picture, web part, etc.



- Web Part: from here you can edit an existing web part on the page.



2. You can change the layout of the page by clicking on the **Text Layout** icon and selecting from the drop down list.



Inserting Text

1. If you would like to add text to the page click on the page where you would like the text to appear and start typing.
2. Click on Format Text on the ribbon to format your text.

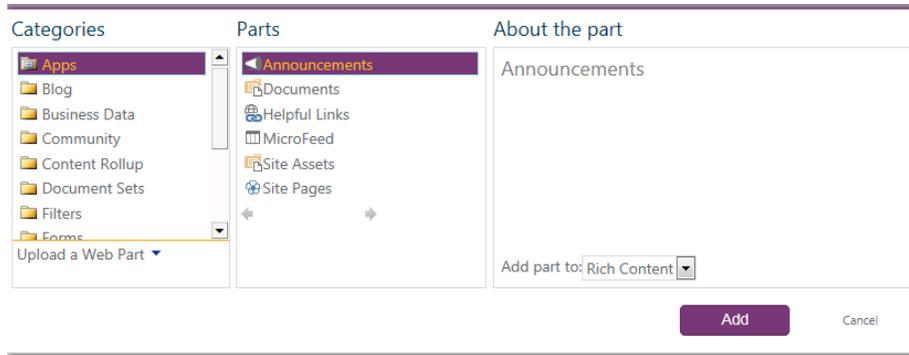
Inserting Pictures

1. To insert a picture first click on the page where you would like the picture to appear.
2. Click on the Picture drop down arrow on the Insert ribbon and select one of the options:
 - From computer: you can upload a photo from your computer. Once the photo is selected it will be automatically uploaded to the SharePoint Site Assets library.
 - From address: you can upload a photo from a website. Copy and paste the URL of the photo into the address bar. **Note: Be aware of copyright laws when uploading a photo from the web.**

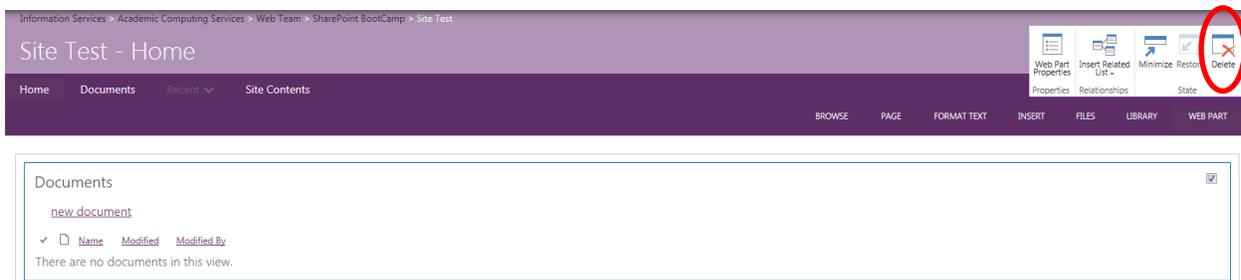
Inserting Web Parts

A web part is an aggregation of information from other sources which can be displayed on a page. Web parts can display many types of data, including lists, libraries and other web pages.

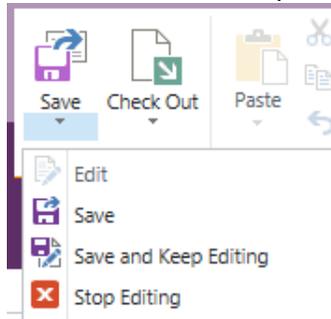
1. To insert a web part first click on the page where you would like the web part to appear.
2. Click on the Web Part icon on the Insert ribbon. The Parts column will contain the apps that you have created.
3. Click on an app that you would like to add and click on Add.



- To delete a web part click inside the web part to select it, click on Web Part on the ribbon and click on Delete.



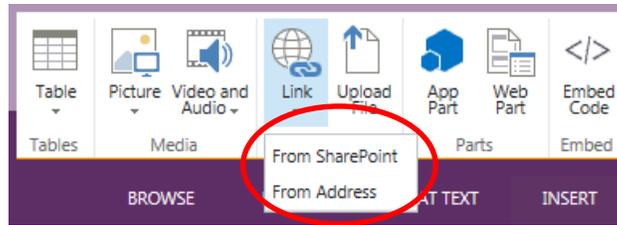
- When you are finished editing click on the Page icon to view the Save button.
- Click on the drop down arrow to view the Save options.



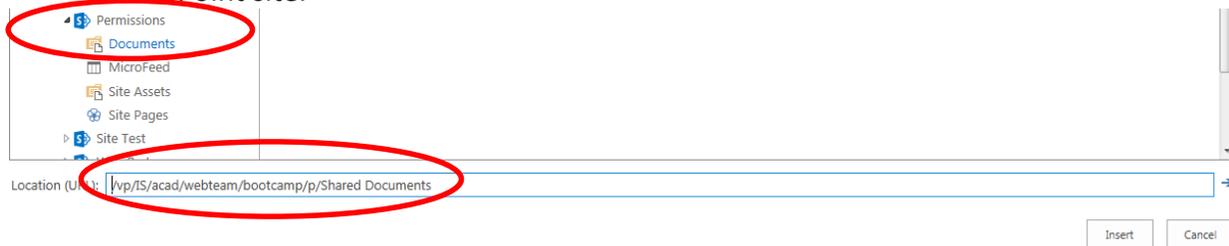
- Click Save to save and close the page.
- Click on Save and Keep Editing to save the changes you have made and to keep the edit window open.
- Click on Stop Editing to discard your changes and close the edit page.

Inserting a Hyperlink

- Click on the Insert icon on the ribbon.
- Click on the page where you would like the link to appear or highlight the text that you would like to turn into a link.
- Click on the Link icon on the Insert ribbon.
- Select from SharePoint or From Address.



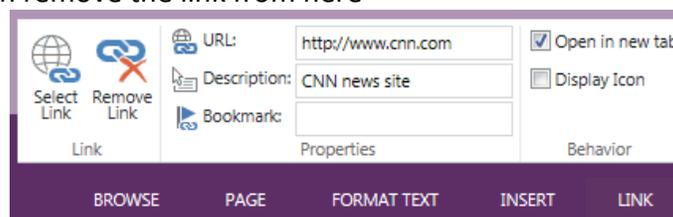
5. If you select From SharePoint a window will open showing everything that can be linked to from the site.
6. In this example I am linking to the Shared Documents library on the Permissions SharePoint site.



7. If you select From address:
 - in the Text to display box type in the text you will be linking to
 - in the Address box type or paste in the URL you will be linking to
 - click on Try Link to make sure the URL is correct
 - click OK when finished



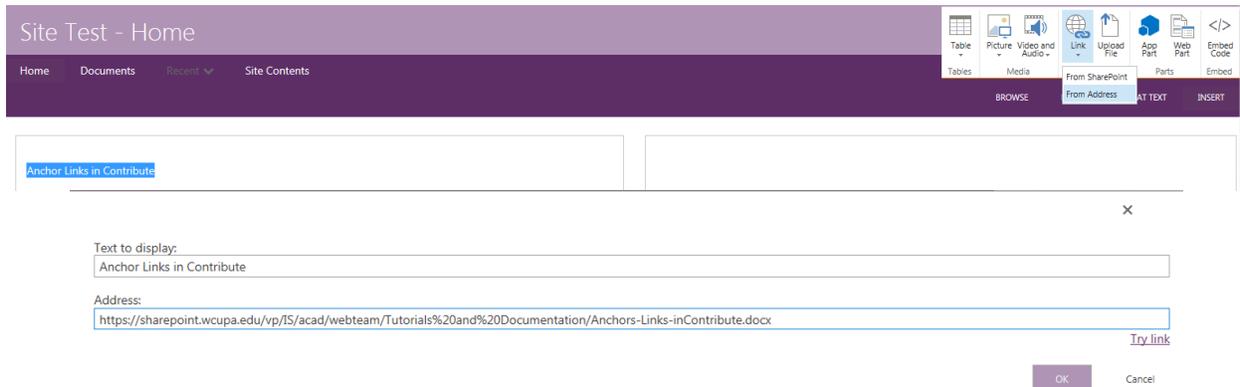
8. After you click OK the Link ribbon appears.
 - you can fill in a description which will appear when you mouse over the link
 - you can have the link Open in a new window when clicked
 - you can remove the link from here



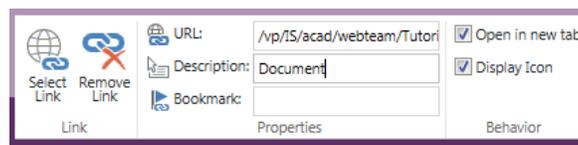
9. Enter the URL address in the Insert Hyperlink box and click OK.
10. Once you have created the hyperlink the Link Tools tab will appear on the ribbon.
11. You can add a description for the link, have it open in a new tab and display an icon.
12. To delete the hyperlink click Remove Link located on the Link Tools ribbon.

Creating a Document Link

1. Open the library that contains the document you wish to create a link for, right click on the document and select copy shortcut.
2. Click on the Edit button.
3. Type the text on the page where you would like the link to appear.
4. Highlight the text.
5. Click on Insert.
6. Select From Address.



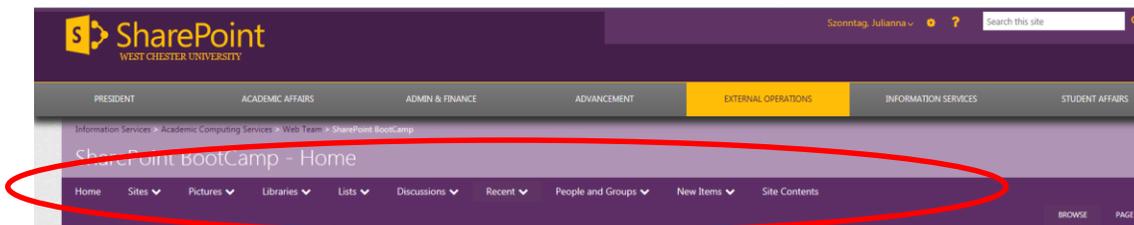
7. Click on Try link to verify that the link is correct.
8. Click Ok.
9. The link tools ribbon opens.
10. Enter a description, you can choose to have the link open in a new tab and display an icon.



11. Click anywhere in the window to close the ribbon.
12. Click Save when finished editing the page.

Customizing the Quick Launch Bar

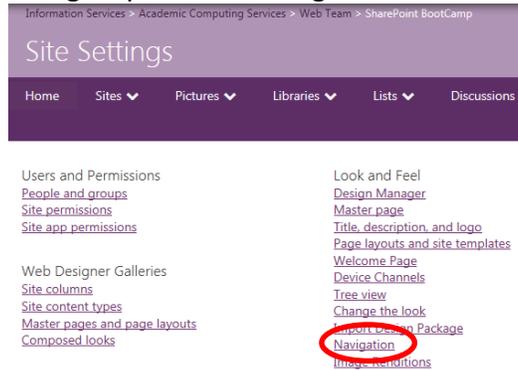
The Quick Launch Bar typically highlights the important content in the current site, such as lists, libraries, and subsites. You use the Quick Launch to navigate between different areas of your site.



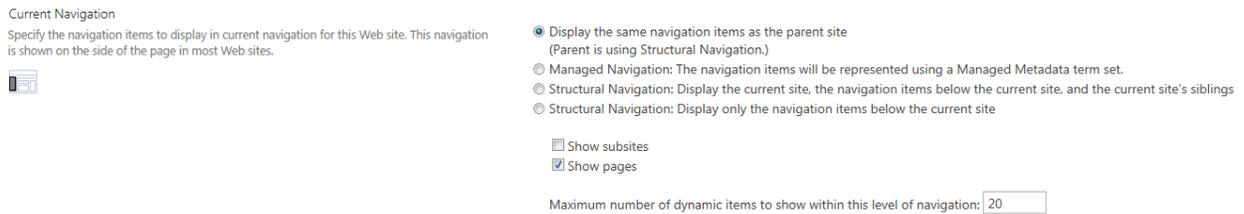
You can choose to have the same Quick Launch same as the parent site or create a custom Quick Launch bar.

Editing the Quick Launch Bar

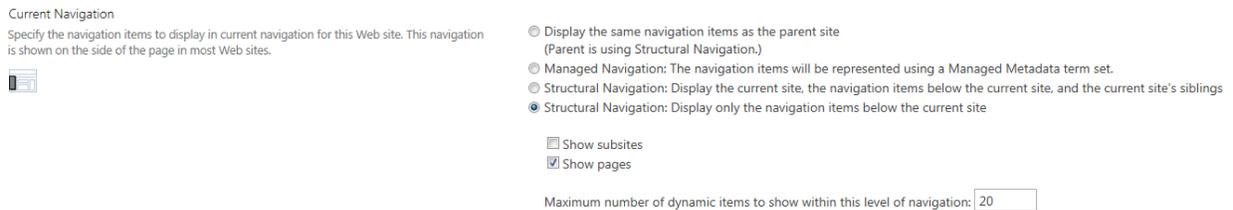
1. Click on the Gear icon and select Site Settings.
2. Under the Look and Feel group click on Navigation.



3. To inherit the parent site navigation go to the Current Navigation section:
 - Select Display the same navigation items as the parent site.



4. To create a custom Quick Launch go to the Current Navigation section:
 - Select Structural Navigation: Display only the navigation items below the current site.



- Option to Show Pages – every time a new product page, biography page, client information page, press release, etc. is added to the site the page will automatically be added to the navigation (likely in a drop down menu based on your structure). It is security trimmed so only users with access to the page will see the navigation item.
- Option to Show Sites – every time a new client management, project management, department (or the like) site is created it will automatically be added to the nav, and is security trimmed as well.
- Set the maximum number of dynamic items to show – stop run away navigation systems with too many options in the top level.

Headings and Links

A **Heading** creates a nested structure for similar links such as libraries, lists, subsites, etc. Or you can create a heading that is a single link such as a Home link that takes users back to the teamsite homepage.

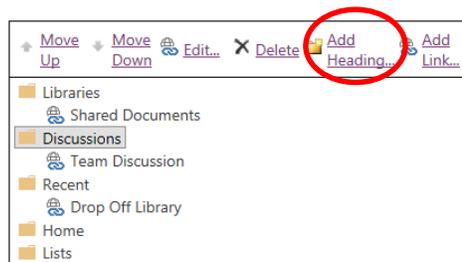
A **Link**, located under a heading, navigates to a specific list, library or subsite.

Adding a Home Link

1. Click on the Settings icon and select Site Settings.
2. Under Look and Feel click on Navigation.
3. Click Add Heading.

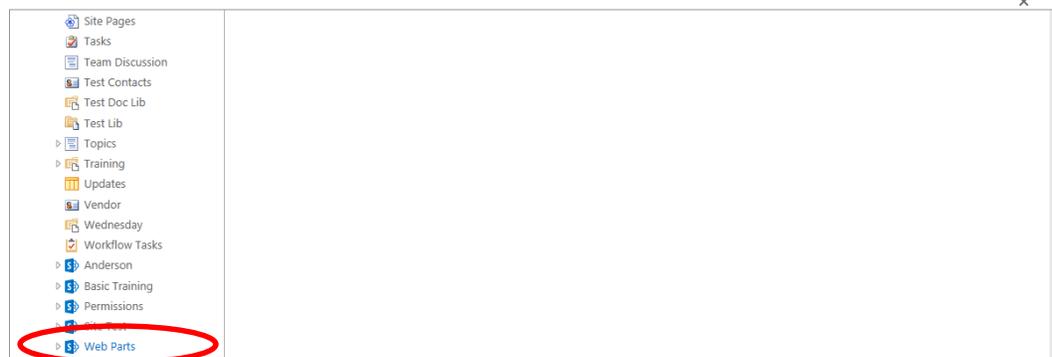
Structural Navigation: Editing and Sorting

Use this section to reorder and modify the navigation items under this site. You can create, delete and edit navigation links and headings. You can also move navigation items under headings and choose to display or hide pages and subsites.



4. In the Title box type Home.
5. Click on Browse.
6. Scroll down the window to locate the teamsite. In this example we are creating a Home link for the Web Parts site.

Current Location: Book Library Test at <https://sharepoint.wcupa.edu/vp/IS/acad/webteam/bootcamp/Lists/Book Library Test>



7. Click on the teamsite link.
8. The URL will appear in the Location box.
9. Click Insert.

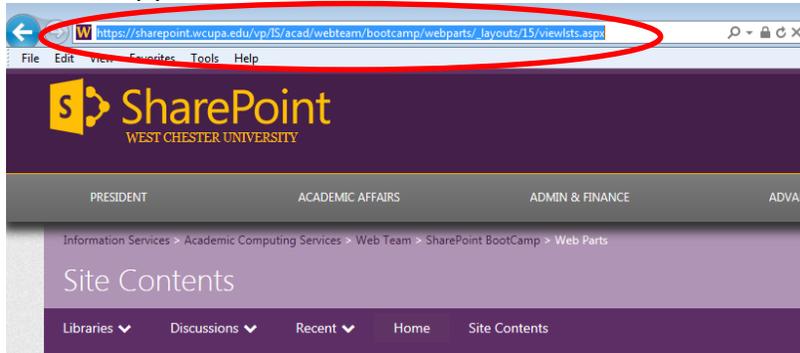


10. Click Ok at the top or bottom of the page to save and close the page.

Adding a Heading that Nests Links

If you want to add a heading for Libraries, Lists or Sites:

1. Go to Site Contents.
2. Copy the URL.



3. Open the Navigation window.
4. In the Structural Navigation: Editing and Sorting section click on Add Heading.
5. Type in the name of the Heading.
6. Paste the URL into the URL box.
7. Click Ok.

■ Edit the title, URL, and description of the navigation item.

Title:	<input type="text" value="Lists"/>
URL:	<input type="text" value="/webparts/_layouts/15/viewlists.aspx"/> <input type="button" value="Browse..."/>
	<input type="checkbox"/> Open link in new window
Description:	<input type="text"/>
Audience:	<input type="text"/>

Adding a Link

To add a link under a heading:

1. Open the Navigation window.
2. Click once on the heading where the link will appear to highlight it.
3. Click on Add Link.
4. Type the name of the library, list, etc. that will appear on the drop down list. **Note:** best practice is to name the link the same as the library or list, etc. that it will link to. This will eliminate any confusion for the user.
5. Type the title.
6. Click Browse.
7. Select the item to be linked and click Insert.
8. Click Ok.
9. Repeat these steps to add additional links.

Ordering Headings and Links

To change the order of a heading or Link:

1. Open the Navigation window.
2. Select the heading or link you wish to move.
3. Click on Move Up or Move Down until the item is positioned where you would like it to appear.
4. Click Ok to close the window.

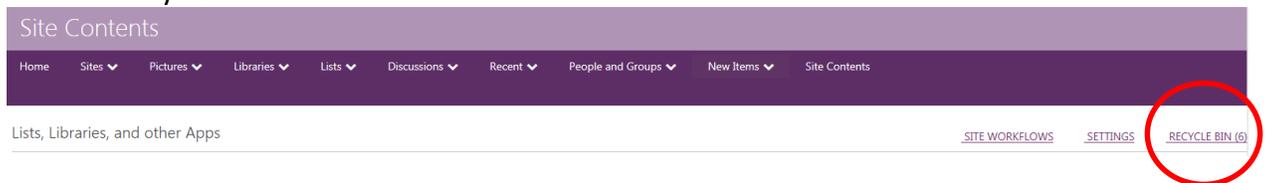
Editing or Deleting a Heading or Link

1. Open the Navigation window.
2. Select the heading or link that you would like to edit.
3. Click Edit.
4. Make the changes.
5. Click Ok.
6. Select the heading or link that you would like to delete.
7. Click Delete.
8. Click Ok to close the window.

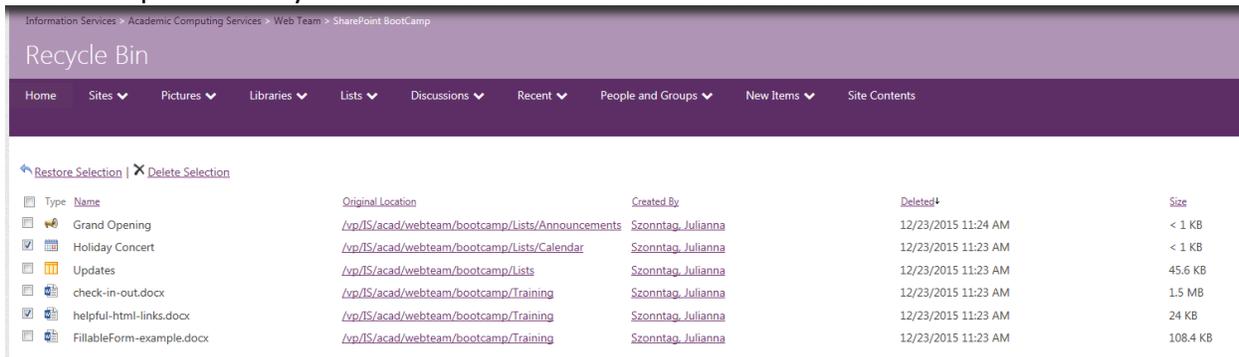
Recycle Bin

Each site has a recycle bin from which deleted items can be restored; items such as documents, list items, entire lists and libraries, etc. **Note:** deleted items that are more than 30 days old will be permanently deleted from the Recycle Bin. The Recycle Bin is located on the Site Contents page.

1. Open Site Contents.
2. Click on Recycle Bin.



3. To restore an item select it and click Restore Selection.
4. The item will be restored to the original location from where it was deleted.
5. To permanently delete the selection click on Delete Selection.



NOTES: