

Microsoft SharePoint

Owner: Planning Your SharePoint Site



Before Working with Your Site

These are the things that you should consider and understand before working with your new SharePoint site:

- Understand common terms used in SharePoint
- Plan out site content
- Plan out site membership and permissions (see **Maintaining groups and setting site permissions** document)
- Review other SharePoint site administration documentation <http://wwwnew.towson.edu/adminfinance/OTS/training/techdocs.asp#SharePoint>

SharePoint Glossary

These are some common SharePoint terms:

- **Alert** - A notification to users, via e-mail, of changes to lists and libraries. Alerts can be sent immediately when an item changes, in a daily summary, or in a weekly summary.
- **Library** - A folder where a collection of files is stored. Additional user-defined Information (such as title, description, version, and date modified) can be stored with each file and displayed in the library's view.
- **List** - A table of data for storing information. Lists are used to provide contacts, links, tasks, threaded discussions, and other collaboration features. Custom lists can be created to store many other kinds of information.
- **Site Collection** - A group of web sites (with a top-level or main site) that has the same owner. Sites in the collection (other than the top-level site) are subsites.
- **Site Collection Administrator** - The owner of a top-level site and all of its subsites. These users have access to the sites' quota usage information and can manage site-wide and user-specific recycle-bins.
- **Site Member** - A user who has permissions to contribute to existing lists and libraries.
- **Site Owner** - A user who can create lists and libraries, contribute to lists and libraries, and assign user permissions.
- **Site Visitor** - A user who can only read content in existing lists and libraries.
- **SubSite** - A separate site, with individual permissions and content, stored within a main site (top-level site). Best used for teams or other subsets of the membership of the main site.
- **View** - Different ways of displaying information in lists and libraries.
- **Web Part** - A customizable Web page element that is typically used to display data from lists and libraries on web parts pages.
- **Web Parts Page** - A Web page that can host one or more Web parts. A site owner can arrange the web parts for the default view of the page. A site's homepage is an example of a web parts page.

Process Summary

Before Working with Your Site

SharePoint Glossary

Types of Site Content

1. Libraries
2. Lists

Structure & Navigation

1. SubSites
2. Quick Launch Menu
3. Tabs
4. Homepage Layout

Types of Site Content

There are two basic types of content in a SharePoint site: lists and libraries.

Libraries

- **Documents** - Document libraries are the most general form of libraries, being able to store virtually any type of Microsoft Office document.
NOTE: Storing Access databases on a SharePoint site is not supported.
- **Pictures** - These libraries are customized for storing pictures. This includes the **All Pictures** view, which provides thumbnails of the pictures in the library.
- **Wikis** - Wiki documents are collaborative pages where team members can add content and edit content that others have posted.

Lists

- **Announcements** - An announcements list is used for posting general messages for site users. It is suggested that users sign up for alerts to receive an e-mail each time an announcement is posted.
- **Contacts** - Use a contacts list for sharing common contact information with your group. This can include vendors, consultants, team members, etc.
- **Discussion Boards** - Discussion Boards (also known as forums) are a good way to have online conversations between site members on any number of topics.
- **Links** - Use a links list to share common web site links, such as support sites, reference material, and other sites relevant to your group.
- **Calendar** - Use a calendar to post important dates/schedules for your group. Examples include maintenance schedules, duty rotations, etc.
- **Tasks** - Tasks lists are used to track responsibilities and assignments throughout your site membership.
- **Project Tasks** - Similar to normal task lists, project task lists provide a Gantt chart view by default.
- **Issue Tracking** - Issue Tracking lists are helpful for keeping track of problems. Items in these lists can be related to each other, if appropriate, and used to monitor recurring problems.
- **Survey** - Surveys can be created to poll your group for their opinion. Survey lists are used to display the information gathered by your surveys.

Site Structure & Navigation

Homepage Layout

A site's homepage is a web parts page. Web parts can be added and arranged on the page to create a useful view of important information for site users.

An announcements list is typically posted on a site's homepage. Other items would depend on the content of your site. Any list or library can be displayed as a web part.

Quick Launch Menu

The quick launch menu is the navigation menu on the left-hand side of the site (Fig 1).

When creating site content lists and libraries, you will have the option to **Display this library (list) on the Quick Launch** (Fig 2). While you can list as many items on the quick launch as needed, depending on the number of lists and libraries on the site, you may not want to list all of them. The most important or most frequently accessed items should be listed on the quick launch in these cases.

Figure 2

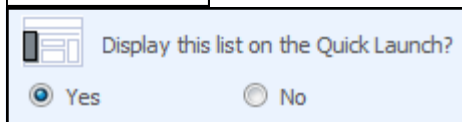
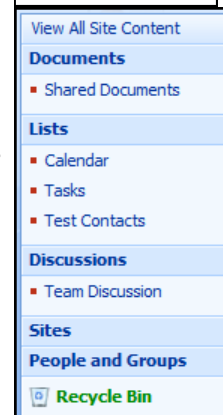


Figure 1

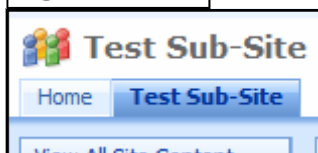


- ★ If a user does not have access to an item that has been checked to be displayed, they will not be able to see it on the quick launch.

SubSites & Top Link Bar

If subsites are appropriate for your site, you can create tabs in the top link bar to navigate between sites in the collection (Fig 3).

Figure 3



When creating a subsite, you will have the option to **Display this site on the top link bar of the parent site** and **Use the top link bar from the parent site** (Figure 4). It is suggested to enable both of these to provide an easy and consistent method for navigating the site collection.

Figure 4



- ★ As with the quick launch, if a user does not have access to an item that has been checked to be displayed, they will not be able to see it on the top link bar.
- ! It is highly recommended that you do not use SharePoint Designer to edit your SharePoint site and subsites. There is a high risk that you could accidentally cause irreversible damage to your site. You should do all of your editing offline and then upload the completed files to your site. If for some reason your site is damaged or deleted files are not in the recycle bin, backups are made by the [Office of Technology Services](#), and you should contact them to see if your information can be recovered.