Introduction

What is Microsoft SharePoint?

SharePoint is a tool to connect people and information. It provides a central site for sharing information with other users. SharePoint is web-based and accessible from anywhere in the world via an internet connection.

SharePoint provides places to store and share ideas, information, communication and documents. The sites facilitate team participation. The document libraries allow for easy checking in and checking out of documents and version control.

A SharePoint Site can have many subsites. Similar to storing files in folders, you can store them within SharePoint sites. However, SharePoint takes file storage to a new level by providing communities for team collaboration. You can create and use a SharePoint site for any purpose. For example, you can build a site to serve as a primary web site for a team or create a site to facilitate a meeting.

A typical SharePoint site may include information such as:

- Shared document libraries
- Contacts
- Calendars
- Task lists
- Discussions

SharePoint sites can be easily searched and users can be alerted when documents have been changed or new ones added.

Upon completion of this workshop, you should be able to:

- Define new terms related to SharePoint
- Navigate within SharePoint using breadcrumbs, top link bar and quick launch bar
- Utilize SharePoint to view, create and modify sites for your department or team
FAQ’s:

• What are the benefits of using SharePoint?

1. **Improve team productivity**: Connect people with the information and resources they need. Users can create team workspaces, coordinate calendars, organize documents, and receive important notifications and updates through communication features including announcements and alerts.

2. **Easily manage documents and help ensure integrity of content**: With enhanced document management capabilities and the ability to view revisions to documents and restore to previous versions, SharePoint can help ensure the integrity of documents stored on team sites.

3. **Get users up to speed quickly**: User interface includes enhanced views and menus that simplify navigation within SharePoint sites. Familiarity with the Microsoft product line makes it easy for users to get up to speed quickly.

4. **Take file sharing to a new level**: SharePoint supplies workspaces with document storage and retrieval features, including check-in/check-out functionality, version history and customizable views.

5. **Provide a cost-effective foundation for building Web-based applications**: SharePoint provides a common framework for document management and collaboration from which flexible Web applications and Internet sites, specific to the needs of the organization, can be built.

6. **Search capabilities**: SharePoint provides unlimited resources for searching, including allowing the user to input a “friendly” name.

**SharePoint User Rights**

In SharePoint, access to sites is controlled by role-based memberships. Each user is assigned a role which specifies the actions a user can perform on the site. The user roles are as follows:

- **Full control**: allows a user to have full control of the site within SharePoint.
- **Design**: allows user to view, add, update, delete, approve and customize the site.
- **Contribute**: allows user to view, add, update and delete the site.
- **Read**: allows the user to view only.
How do I access the UNO SharePoint site?
The link to the site is: http://sharepoint.uno.edu
You will be prompted to enter your LAN username (including @uno.edu) and password.

For the purposes of this training, we will access the training SharePoint site. In your browser address box, type https://sharepoint.uno.edu:26000/default.aspx. When prompted, enter your LAN username and password.
Add SharePoint as a Trusted Site in Internet Explorer:

This process will stop repeated login requests while working in SharePoint.

1. Open Internet Explorer, select **Tools > Internet Options > Security Tab > Trusted Sites > Sites**

2. Type in the **SharePoint URL**: https://sharepoint.uno.edu > Add > Close
Navigating SharePoint sites:

Navigating through SharePoint is similar to navigating many common websites. For most, this navigation will be intuitively familiar.

A typical SharePoint web site provides a site for your team to communicate, share documents and work together. The site structure includes the following components:

- **List**: A list is a collection of information (NOT files) and can include announcements, contacts, discussion board, links, calendar, tasks, project tasks, issue tracing, survey and custom lists.

- **Library**: A library is similar to a list, except that it stores files as well as information about files. Libraries can include document, form, wiki page, picture, slide and report libraries.

To add an item to a list or a file to a library, you must have permission to contribute to the list or library. This permission is assigned by the site owner or administrator.

Navigating the Home Page and SharePoint site

A Home Page is the main page of a SharePoint web site; it provides a navigational structure that links the site components together. The home page has two major navigational areas: the **top link bar** and the **quick launch bar**.

The opens SharePoint Help which is launched in a separate window and allows you to search for needed information.
Web Part Pages

A **Web Part Page** is a special type of page on a SharePoint site that contains one or more web parts. **Web parts** are basic building blocks of a web part page. A **Web Part** can be reused, shared and personalized by all users who have permission to access it.

Basic **web parts** on a default home page:

Each of these areas are considered Web Parts of this site.
Creating Sites:

SharePoint sites and workspaces are containers for information. You can use any site as a single container or create as many subsites as necessary to make the data easier to find and/or manage.

Creating sites:

EXERCISE:

1. Select Site Actions
2. Create
3. Site and Workspaces

4. On the **New SharePoint Site** page, enter the Title, Description and URL for this site. Also, you will need to answer two important questions:

   - Do you want to display this site on the quick launch bar?
   - Do you want to display this site on the top link bar?
5. **Click Create.** You will notice that the site now appears on the top link bar, as well as the quick launch.
Overview of Document Libraries and Lists:

A list is a collection of information where your college or department can store, share and manage information. For example, you can create a sign-up sheet for an event or track team events on a calendar. You can also host discussions on a discussion board.

A library is similar to a list, except that it stores files as well as information about files. You can control how documents are viewed, tracked, managed and created in libraries.

Both lists and libraries are stored in sites. A site is a group of related web pages where your team can share information.

Create a list from a list template:

SharePoint includes several different types of ready-made lists, ranging from a calendar to a contact list. Although some settings vary, you can use the same basic procedure to create any type of list.

Note: To create a list, you must have permission to change the site.
EXERCISE:

1. Click **View All Site Content** and then click **Create** on the All Site Content page. Note: In most cases, you can use the **Site Actions** menu instead to complete this step.

2. Under **Communications** or **Tracking**, click the type of list that you want to create, such as **Contacts** or **Calendar**.
Types of lists:

The type of list that you will use depends on the kind of information you are sharing:

- **Announcements**: use an announcement list to share news, status or to provide reminders.
- **Contacts**: use a contacts list to store information about people or groups that you work with, such as a list of external vendors.
- **Discussion boards**: use a discussion board to provide a central place to record and store team discussions.
- **Links**: use a links list as a central location for links to the Web or other resources.
- **Calendar**: use a calendar for all of your team’s events or for specific situations, such as meetings or holidays.
- **Tasks**: use a task list to track information about projects and other to-do events for your group. You can assign tasks to people, as well as track the status and percentage complete as the task moves toward completion.
- **Project tasks**: use a project task list to store information that is similar to a task list, but also provides a visual view with progress bars.
- **Issue tracking**: use an issue tracking list to store information about specific issues, such as support issues, and track their progress. You can assign issues, categorize them and relate them to each other. For example, you can use this type of list to manage customer service problems and solutions. You can also comment on issues each time you edit them, creating a history without altering the original description.
- **Survey**: use survey to collect and compile feedback, such as an employee satisfaction survey or a quiz. You can design your questions and answers in several different ways and see an overview of your feedback.
• **Custom:** You can customize any list or start with a template and then customize just the settings that you specify.

3. In the **Name** box, type a name for the list. (A name is required.)

4. In the **Description** box, type a description of the purpose of the list. (This is optional.)

5. To add a link to this list on the Quick Launch, click **Yes** in the Navigation section.

6. Click **Create**.
Creating a Library:

SharePoint includes several different types of libraries, ranging from a document library to a report library. Although some settings vary, you can use the same basic procedure to create any type of library.

Note: To create a library, you must have permission to change the site.

EXERCISE:

1. Click **View All Site Content** and then click **Create** on All Site Content page. Note: In most cases, you can use the **Site Actions** menu instead to complete this step.
2. **Under libraries**, click the type of library you want to create, such as **Document Library** or **Report Library**.

### Types of libraries:

The type of library that you use depends on the kinds of files that you are sharing:

- **Document library**: For many file types, including documents and spreadsheets, use a document library.
- **Picture library**: To share a collection of digital pictures or graphics, use a picture library.
- **Wiki page library**: To create a collection of connected wiki pages, use a wiki page library.
- **Form library**: If you need to manage a group of XML-based business forms, use a form library.
Ways to work with libraries:

The Shared Documents library is created for you when SharePoint creates a new site. You can start using this library right away, customize it, or create other libraries.

Here are some ways to work with libraries and make them more useful for your group:

- **Require document approval**  You can specify that approval for a document is required. Documents remain in a pending state until they are approved or rejected by someone who has permission to do so. You can control which groups of users can view a document before it is approved.

- **Track versions**  If you need to keep previous versions of files, libraries can help you track, store, and restore the files. You can choose to track all versions in the same way. Or you can choose to designate some versions as major, such as adding a new chapter to a manual, and some versions as minor, such as fixing a spelling error. To help manage storage space, you can optionally choose the number of each type of version that you want to store.

- **Require check-out of files**  When you require check-out of a file, you ensure that only one person can edit the file until it is checked in (check in: To release the lock for editing and enable other users to view the updated file or check out the file.). Requiring documents to be checked out prevents multiple people from making changes at the same time, which can create editing conflicts and lead to confusion. Requiring check-out can also help to remind team members to add a comment when they check a file in, so that you can more easily track what has changed in each version.

- **Stay informed about changes**  You can set up alerts so that members of your workgroup can automatically receive e-mail alerts, so that you are notified when files change.

- **Edit files offline**  If you prefer to work on your files on your hard disk drive, you can check them out and work offline, if you use an application that is compatible with Windows SharePoint, such as Microsoft Office.

- **Copy documents easily to another location**  You can easily send a file to another location on a SharePoint site. When you update the original document, you can choose to be prompted to update the file in the other locations.

- **Specify unique permission**  You can specify unique permission for a library, or even a file within a library.
Adding and Modifying Content

You can add information and files to SharePoint by using a Web browser. You can also save files to a library from programs that are compatible with SharePoint. For example, you can save a Word document to a library on a SharePoint site while you work in Word.

SharePoint sites can include a variety of lists (contacts, calendars, announcement, etc). Regardless of the type of list, the process is similar for adding, editing and deleting list items.

Add an item to a list:

Some lists may appear in Web Parts, which are basic building blocks of Web pages on a SharePoint site. For example, the Announcements, Calendar, and Links lists appear in Web Parts on a default page. When a list appears in a Web Part, you can add items to the list without actually opening up the list. If you do not see the link to add more items to a list, you need to open the list.

Do one of the following:

- If your list appears in a Web Part, you may see a link in the Web Part that you can use to add more items to it, such as Add new announcement or Add new event. Click Add new item, then skip to step 3.

- If the list is not already open, click its name on the Quick Launch. If the name of your list does not appear, click View All Site Content, then click the name of your list.

- On the New menu, click the arrow, then click New Item.

- Enter the information for the list item. Information required has a red asterisk next to it.

- To attach a file to the list item, click Attach File, click Browse to locate the file, and then click Ok.

- Click Ok.
Adding content to a library works the same, except you can add a document or add a folder to store documents within.

**Modify a list item:**

- Click the name of the list item you wish to modify from the Quick Launch.
- Click the title of the item you wish to modify.
- Select **Edit Item**
- A screen will open allowing you to modify the content of that item.

Modifying a document in a **library** works very similar, except you will be asked where you want to modify the document. For example, if the document is a Word document stored in the library, SharePoint will allow you to modify the document in Word and save the changes in SharePoint.
DISCUSSION BOARDS

This feature allows you to gather feedback and information from users of your site by starting topics and posting replies.

Creating and using a discussion board

Discussion boards provide a forum in which users can converse about topics that interest them or are related to a particular project. Within discussion boards you can start new discussions and sort and filter existing discussions. You can also create alerts that notify you of changes to the discussion board.

To create a new discussion board, add a new item, delete an item and remove the discussion board:

EXERCISE:

1) From the Quick Launch bar, click Discussions.
2) Select **Create**

3) Select **Discussion Board** under Communications

4) Enter the name, description and if you would like it displayed on the Quick Launch. Next, click **Create**.
5) The Discussion Board is now displayed on the Quick Launch under Discussions.
6) To add an item to the discussion board, click **New**.

7) On the new item page, enter the subject, body and click **Ok**.
8) The new item has been added.

9) To reply to a posting, select the drop-down arrow to the right of the Discussion Board Subject and select **Reply**. On the New Item page, type the body of your reply in the space provided and click **Ok**.

10) Your reply will be displayed below the initiating post. You can also click **Reply** from this page to enter more comments.

11) To delete a discussion board item, click the drop-down arrow to the right of the subject and select **Delete Item**. A dialog box will appear asking if you are sure you want to delete the item, click **Ok**.

12) To delete the discussion board from the Quick Launch, select **Settings > Discussion Board Settings > Delete this discussion board**.

13) Again, a dialog box will appear asking if you are sure you want to delete the discussion board, click **Ok**. Now, the discussion board has been deleted from the Quick Launch.
DOCUMENT MANAGEMENT

Checking Out /Checking In Documents from the Document Library

One of the primary uses of SharePoint is basic document management. **Checking In** and **Checking Out** documents lets others know what documents you are working on so they cannot work on them at the same time. Check-in also enables you to enter comments about what you’ve changed, which others can view.

To check-out and check-in a document:

EXERCISE:

1) Open the SharePoint site from which you’d like to check out a document.

2) Click the drop-down arrow to the right of the document name and select **Check Out**.

3) At this point, you could alter the document as needed.

4) When all changes are completed, you are ready to check the file back in. (You must check the file back in before other people can see or use them.) Click the drop-down arrow to the right of the document name and select **Check In**.

5) The document check-in page will appear. This page allows you to enter comments regarding the type of changes you made to the document.
To discard changes to a checked-out document:

If you check out a file from a library on a site, make changes, and then decide you don’t want to keep the changes made, you can undo the check-out. The changes made will be discarded and the file will be made available again for other people to edit. You can only undo the changes if you were the person who checked out the file.

1) If the file has already been checked-out and changes have been made, yet you want to discard those changes, click the drop-down arrow to the right of the document name and select **Discard Check Out**.
2) A dialog box will appear asking you to confirm that you want to discard your changes. Click **yes** if you are sure there are no changes that you want to save.

Version History

When versioning is enabled, SharePoint creates a separate copy of the document each time it is edited. This makes it easier to go back to an older version of the document if necessary.

When you view a document’s Version History, you will see a list of times this document was edited and saved as well as the author’s comments on those changes.

To enable versioning:

EXERCISE:

1) From the document you want to enable versioning for, select **Settings > Document Library Settings**.
2) From the Customize Shared Documents page, select **Versioning settings**.

3) On the Document Library Versioning Settings page, set the parameters as appropriate for your needs and click **ok**.
To view the version history of a document:

EXERCISE:

1) From the shared document you want to view the version history of, click the drop-down arrow to the right of the title of the document and select **Version History**.
2) The history will be displayed, as shown below.
USE OF RECYCLE BIN

If a Web Part or item is deleted, it will be retained in the Recycle Bin for 30 days. A user can access the data from the recycle bin within that 30 day period. To restore the data, check the box next to the file you want to retrieve and click Restore Selection.

Following the initial 30 days, the Web Part or item will be moved to the Administrative Recycle Bin where it will remain for another 50 days. However, to access the Web Part or item from the Administrative Recycle Bin, you will need to send an email to sharepoint@uno.edu for assistance in retrieving the data.
USE AND MANAGEMENT OF ALERTS

SharePoint includes this feature which sends an email notification whenever changes are made to site content, including changes made to items in a list. This email notification is called an alert. No alerts are set up automatically, so you must set it up if you want to be alerted.

Alerts are easy to set up. Every list in a SharePoint site displays an Alert Me link in the Actions section. By clicking this link, you can set up an alert.

You will have to specify to whom the alert is sent and the kind of changes and frequency for which the alert is sent. By default, the alert is sent to the email address of the user setting up the alert.

Create an alert:

EXERCISE:

1) Open the SharePoint site where you want receive an alert.
2) On the Quick Launch bar, select tasks.
3) On the right of the title, click the drop-down menu, then select Alert Me. On the New Alert page, select the criteria for which you want to be alerted and then click Ok.

So now, anytime a change is made to this item, you will immediately receive an email notification.
Delete an alert:

EXERCISE:

1) From the New Alert page, select View my existing alerts on this site.

2) From the My Alerts on this Site page, check the box of the item you no longer needed to be alerted about, then select Delete Selected Alerts.
UNDERSTANDING MYSITE

MySite is a personal site that gives you a central location to manage and store your documents, content, links and contacts. MySite serves as a point of contact for other users in your organization to find information about you and your skills and interests.

Your MySite provides:
- A central location for you to view and manage all of your documents, tasks, links, calendar, colleagues and other person information.
- A way for other users to learn about you and your areas of expertise, current projects and colleague relationships.
- A place to present content and documents to other people and create your own workspaces.

The site:
By default, your MySite includes two parts: a personal/private site called My Home and a public site called My Profile. You are the administrator of the personal site. As such, you can create document libraries, picture libraries, calendars, tasks, etc.

Ways to work with MySite:
- Use and keep track of links – The My Links page allows you to keep track of your favorite web sites and access them from any computer on the network. When you log in, My Links appears in the upper-right corner on every site. By using the My Links menu, you can easily add new links, organize your links or access sites. You can also add a link from your My Home page of your MySite. When a link is added, it will appear in the My Links drop-down menu.

EXERCISE:

Add a link to your My Links menu.

1. Click My Links from the top right menu bar.

2. Select Add to My Links from the drop down menu.

3. Select who you want the link visible to and click Ok.
- Keep track of your colleagues – this web part allows you to keep track of events, such as whether your colleagues are in the office, in meetings, etc.

- Share documents – this web part is useful for listing all of the documents you have created, saved or modified.

- Create meeting workspaces – this web part allows you to create a workspace for meeting materials, such as agendas, related documents, objectives and tasks.

- Create document workspaces – this web part allows you to coordinate the development of one or more related documents with other people.
Searching SharePoint sites:

You can search for text or files within a SharePoint site by using the search box.

When you perform a search on a SharePoint site, your query searches only the current site and any subsites below it. You cannot search across sites unless you search from the root site. You also cannot search for content outside of SharePoint, even if the other site that you want to search is compatible with SharePoint.

You can search for a specific word or phrase from any web part page, list or library within your site by setting the search scope to This Site. You can also search for a specific work or phrase in a list such as a document library, task list, calendar or custom list by setting the search scope to This List.

If the site contains subsites, your search query may also return matching results if the query text is found in any of those subsites.

Example:

1. Go to the site page, list or library from which you want to search.

2. Do one of the following:
   - To search the site and any subsites, set the search scope to This Site.
   - To search the current list, set the search scope to This List.

3. In the search box, type the word or phrase that you want to look for and then click the Search button.

Notes:

- The search box is limited to a maximum of 255 characters.

- The search results page displays the number of results that were returned for your search query and the amount of time it took to perform the search query. By default, search results are displayed by relevance. To sort the list of results by the date when the items were last modified, click View by Modified Date.
When you search from a list, the search scope is set to **This List** by default, and results appear only for that list. To find text or files elsewhere on the site or subsites, set the search scope to **This Site**.
SharePoint Definitions:

**Check-out**: To lock a file while editing it to prevent others from overwriting or editing it inadvertently. Only the user who checks out a document can edit the document.

**Home Page**: A *Home Page* is the main page of a SharePoint web site; it provides a navigational structure that links the site components together. The home page has two major navigational areas: the *top link bar* and the *quick launch bar*.

**Library**: A *library* stores files as well as information about files. You can control how documents are viewed, tracked, managed and created in libraries.

**List**: A *list* is similar to a library, except that it is a *collection of information* where your college or department can store, share and manage information (not files).

**Versioning**: The process of creating a numbered copy of a file or an item whenever a revision is saved to the library or list.

**Web Part**: *Web parts* are basic building blocks of a web part page. A *Web Part* can be reused, shared and personalized by all users who have permission to access it.

**Web Part Page**: a special type of page on a SharePoint site that contains one or more web parts.

**SharePoint Resources Website**: [http://spsupport.uno.edu](http://spsupport.uno.edu)