



UNIVERSITY *of*
NEW ORLEANS

Microsoft Windows SharePoint

SharePoint Basics

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.

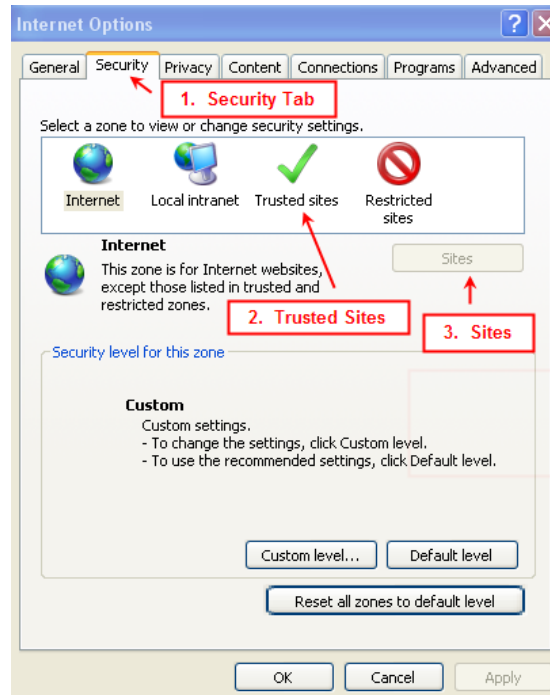


For the purposes of this training, we will access the training SharePoint site. In your browser address box, type <https://sharepoint.uno.edu:26000/default.aspx>. When prompted, enter your LAN username and password.

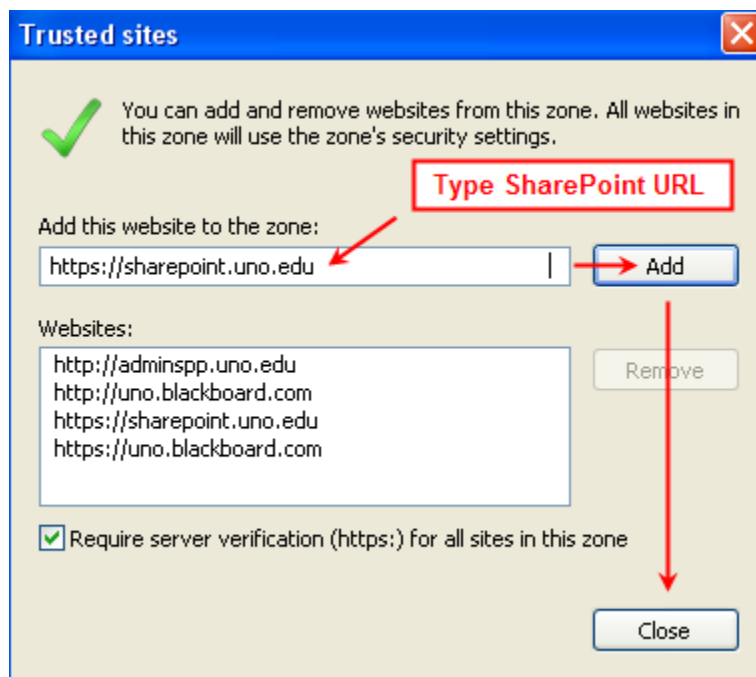
Add SharePoint as a Trusted Site in Internet Explorer:

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.

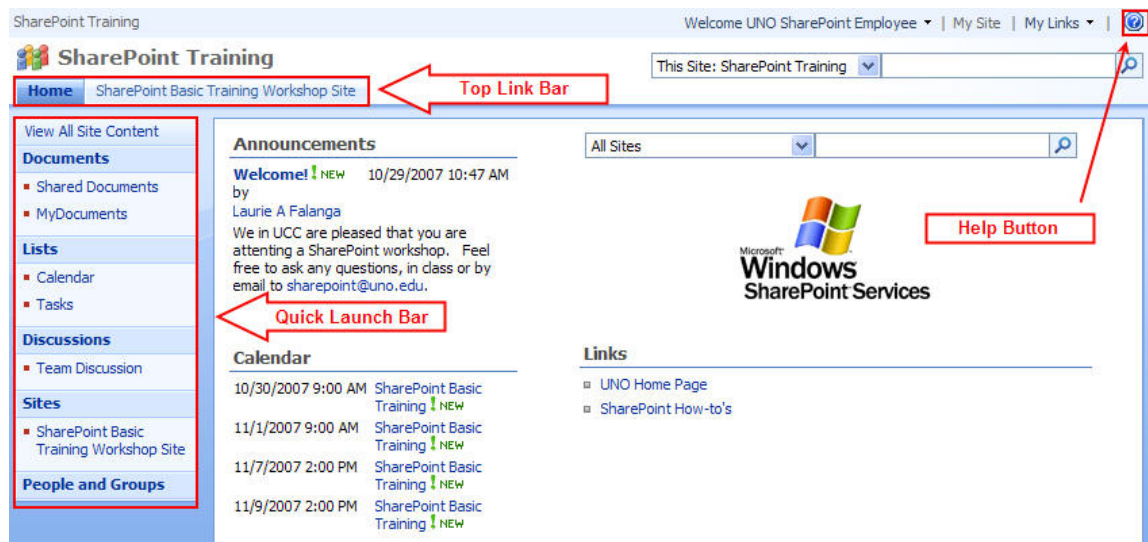
A typical SharePoint web site provides a site for your team to communicate, share documents and work together. The site structure includes the following components:


- ❖ **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:



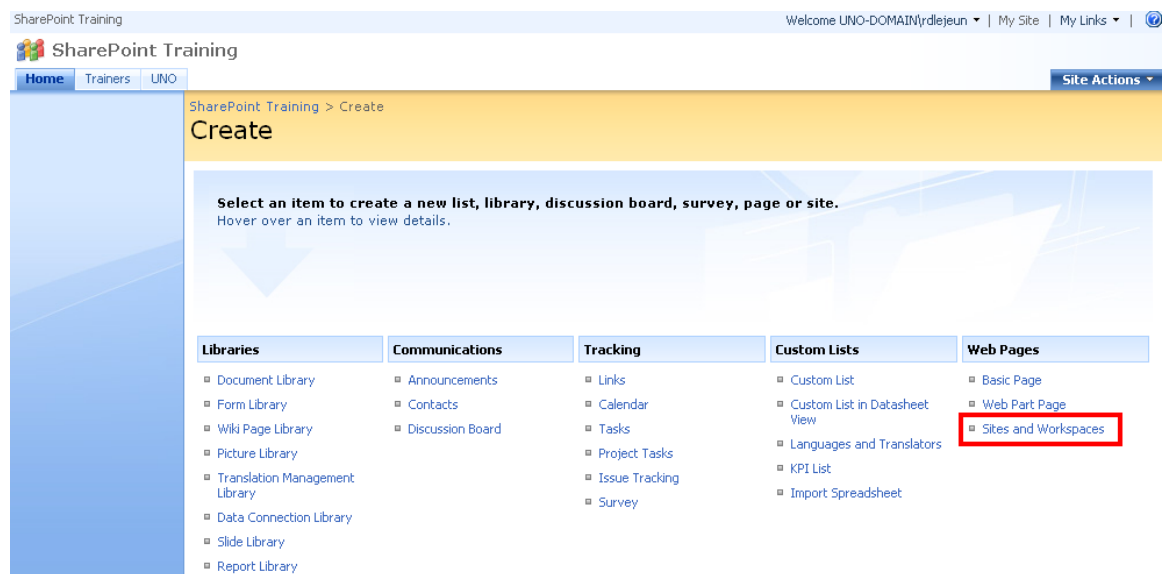
Creating Sites:

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?

SharePoint Training

Welcome UNO-DOMAIN\rdjeun | My Site | My Links |

Home Trainers UNO Site Actions

SharePoint Training > Create > New SharePoint Site

Use this page to create a new site or workspace under this SharePoint site. You can specify a title, Web site address, and access permissions.

Create Cancel

Title and Description
Type a title and description for your new site. The title will be displayed on each page in the site.

Title:

Description:

Web Site Address
Users can navigate to your site by typing the Web site address (URL) into their browser. You can enter the last part of the address. You should keep it short and easy to remember.
For example, http://devpp.uno.edu/siteName

URL name:

Template Selection

Select a template:

Collaboration Meetings Enterprise Publishing

Team Site
Blank Site
Document Workspace
Wiki Site
Blog

A site for teams to quickly organize, author, and share information. It provides a document library, and lets for managing announcements, calendar items, tasks, and discussions.

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.
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.

User Permissions:
☒ Use same permissions as parent site
☐ Use unique permissions

Navigation
Specify whether links to this site appear in the Quick Launch and the top link bar of the parent site.

Display this site on the Quick Launch of the parent site?
☒ Yes ☐ No

Display this site on the top link bar of the parent site?
☒ Yes ☐ No

Navigation Inheritance
Specify whether this site shares the same top link bar as the parent. This setting may also determine the starting element of the breadcrumb.

Use the top link bar from the parent site?
☒ Yes ☐ No

Create Cancel

5. Click **Create**. You will notice that the site now appears on the top link bar, as well as the quick launch.

SharePoint Training

Welcome UNO-DOMAIN\rdjeun | My Site | My Links |

This Site: SharePoint Training

Home Trainers UNO **SharePoint Training 1** Site Actions

View All Site Content

Documents

- Shared Documents

Lists

- Calendar
- Tasks

Discussions

- Team Discussion

Sites

- Trainer Group
- UNO
- SharePoint Training 1**

People and Groups

Recycle Bin

Announcements

There are currently no active announcements. To add a new announcement, click "Add new announcement" below.

Add new announcement

Calendar

There are currently no upcoming events. To add a new event, click "Add new event" below.

Add new event

Links

Google

Add new link

All Sites

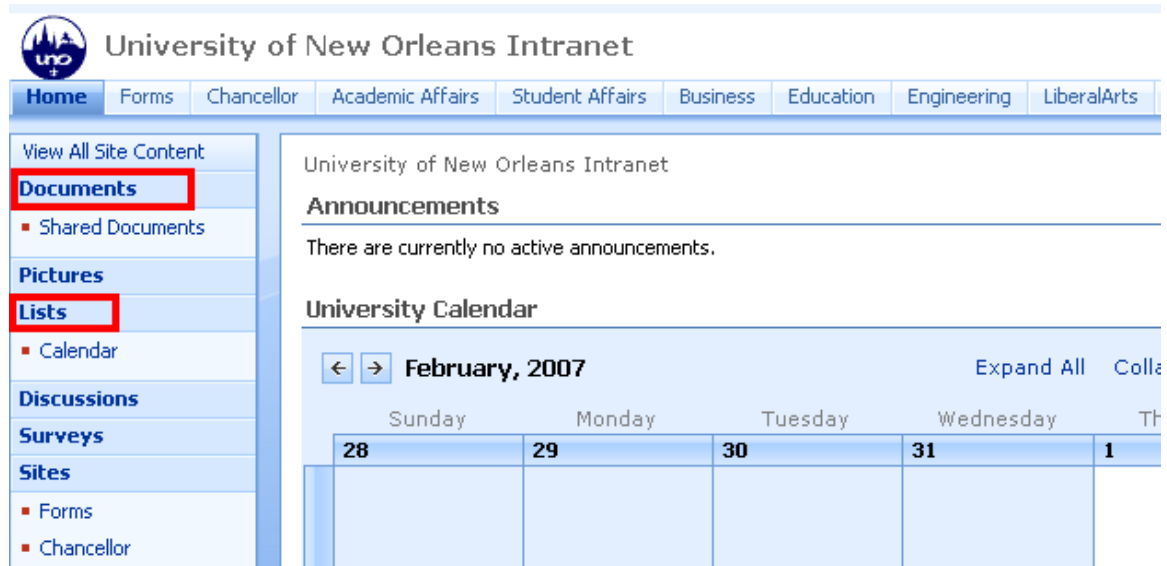
Microsoft Windows SharePoint Services

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.



The screenshot shows the University of New Orleans Intranet interface. The left navigation menu includes links for 'View All Site Content', 'Documents' (highlighted with a red box), 'Shared Documents', 'Pictures', 'Lists' (highlighted with a red box), 'Calendar', 'Discussions', 'Surveys', 'Sites', 'Forms', and 'Chancellor'. The main content area displays 'University of New Orleans Intranet', 'Announcements' (stating 'There are currently no active announcements.'), and a 'University Calendar' for February 2007. The calendar shows days of the week and dates, with the 1st of February highlighted.

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.

SharePoint Training

Welcome Rhonda D Le Jeune | My Site | My Links

Home Trainers UNO

SharePoint Training > UNO > All Site Content

All Site Content

View: All Site Content

Create

Name	Description	Items	Last Modified
Document Libraries			
About UNO	Numerous topics of interest about the University of New Orleans.	4	6 days ago
Admissions		1	6 days ago
Arena Events	Events occurring at the Lakefront Area.	0	6 days ago
Athletics	Athletic events	0	6 days ago
Contact	Contact UNO	0	6 days ago
Finances		0	6 days ago
Locations	UNO Locations	0	6 days ago
Shared Documents	Share a document with the team by adding it to this document library.	4	6 days ago
Student Life		0	6 days ago
Picture Libraries			
UNO Campus Picture	UNO Campus Picture	1	25 hours ago
Lists			
Announcements	Use the Announcements list to post messages on the home page of your site.	2	6 days ago
Calendar	Use the Calendar list to keep informed of upcoming meetings, deadlines, and other important events.	12	3 days ago
Departments/Colleges	All depts or colleges within UNO	12	6 days ago
Links	Use the Links list for links to Web pages that your team members will find interesting or useful.	24	2 days ago
Tasks	Use the Tasks list to keep track of work that you or your team needs to complete.	0	6 days ago
Discussion Boards			
Team Discussion	Use the Team Discussion list to hold newsgroup-style discussions on topics relevant to your team.	1	2 days ago
Surveys			
There are no surveys. To create one, click Create above.			
Sites and Workspaces			
There are no subsites or workspaces. To create one, click Create above.			
Recycle Bin			
Recycle Bin	Use this page to restore items that you have deleted from this site, or to empty deleted items.	10	

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

SharePoint Training

Welcome Rhonda D Le Jeune | My Site | My Links

Home Trainers UNO

SharePoint Training > UNO > Create

Create

Select an item to create a new list, library, discussion board, survey, page or site.
Hover over an item to view details.

Libraries	Communications	Tracking	Custom Lists	Web Pages
<ul style="list-style-type: none">Document LibraryForm LibraryWiki Page LibraryPicture LibraryTranslation Management LibraryReport LibraryData Connection LibrarySlide Library	<ul style="list-style-type: none">AnnouncementsContactsDiscussion Board	<ul style="list-style-type: none">LinksCalendarTasksProject TasksIssue TrackingSurvey	<ul style="list-style-type: none">Custom ListCustom List in Datasheet ViewKPI ListLanguages and TranslatorsImport Spreadsheet	<ul style="list-style-type: none">Basic PageWeb Part PageSites and Workspaces

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**.

SharePoint Training

Welcome UNO-DOMAIN\rdejeun | My Site | My Links

UNO

Home Trainers UNO

Site Actions

SharePoint Training > UNO > Create > New

New

Name and Description

Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this list.

Name:

Description:

Navigation

Specify whether a link to this list appears in the Quick Launch.

☒ Display this list on the Quick Launch?

☒ Yes ☐ No

Create **Cancel**

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.

SharePoint Training

Welcome UNO-DOMAIN\rdrlejeun | My Site | My Links

Home Trainers UNO

SharePoint Training > UNO > All Site Content

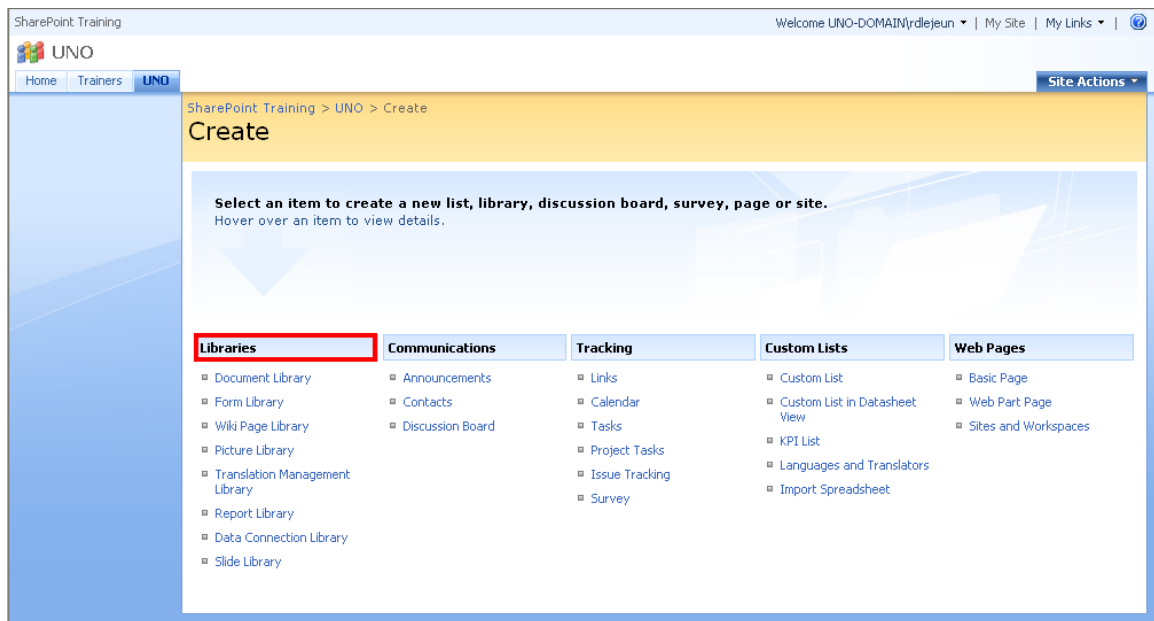
All Site Content

View: All Site Content

Create

Name	Description	Items	Last Modified
Document Libraries			
About UNO	Numerous topics of interest about the University of New Orleans.	4	2 hours ago
Admissions		1	6 days ago
Arena Events	Events occurring at the Lakefront Area.	0	6 days ago
Athletics	Athletic events	0	6 days ago
Contact	Contact UNO	0	6 days ago
Finances		0	6 days ago
Locations	UNO Locations	0	6 days ago
Shared Documents	Share a document with the team by adding it to this document library.	4	6 days ago
Student Life		0	6 days ago
Picture Libraries			
UNO Campus Picture	UNO Campus Picture	1	29 hours ago
Lists			
Announcements	Use the Announcements list to post messages on the home page of your site.	2	6 days ago
Calendar	Use the Calendar list to keep informed of upcoming meetings, deadlines, and other important events.	12	3 days ago
Departments/Colleges	All depts or colleges within UNO	12	6 days ago
Links	Use the Links list for links to Web pages that your team members will find interesting or useful.	24	2 days ago
Tasks	Use the Tasks list to keep track of work that you or your team needs to complete.	0	6 days ago
Discussion Boards			
Team Discussion	Use the Team Discussion list to hold newsgroup-style discussions on topics relevant to your team.	1	2 days ago
Surveys			
There are no surveys. To create one, click Create above.			
Sites and Workspaces			
There are no subsites or workspaces. To create one, click Create above.			
Recycle Bin			
Recycle Bin	Use this page to restore items that you have deleted from this site, or to empty deleted items.	10	

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 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**.

SharePoint Training

Welcome UNO-DOMAIN\rdlejeun | My Site | My Links

This Site: UNO

Home Trainers UNO

SharePoint Training > UNO > Tasks > New Item

Tasks: New Item

OK Cancel

Attach File ABC Spelling... * Indicates a required field

Title *

Priority (2) Normal

Status Not Started

% Complete %

Assigned To

Description

Start Date 2/15/2007

Due Date

OK Cancel

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**

SharePoint Training

Welcome UNO-DOMAIN\rdlejeun | My Site | My Links

This Site: UNO

Home Trainers UNO

SharePoint Training > UNO > Departments/Colleges > Business

Departments/Colleges: Business

Close

New Item **Edit Item** Delete Item Manage Permissions Alert Me

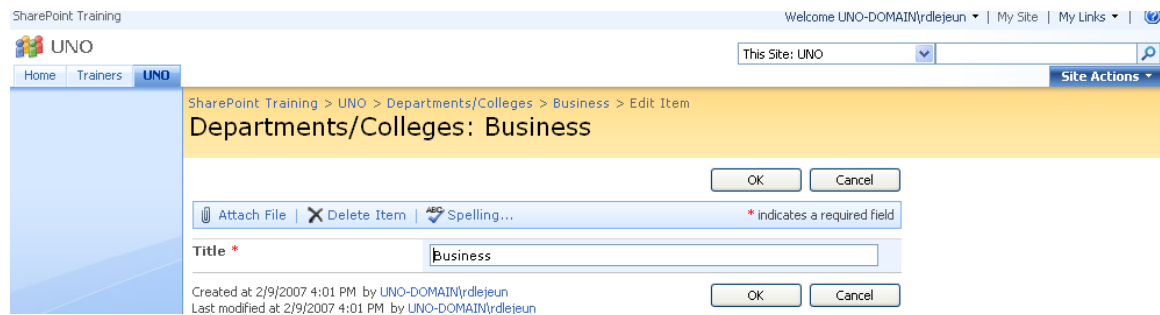
Title Business

Created at 2/9/2007 4:01 PM by UNO-DOMAIN\rdlejeun

Last modified at 2/9/2007 4:01 PM by UNO-DOMAIN\rdlejeun

Close

- 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.

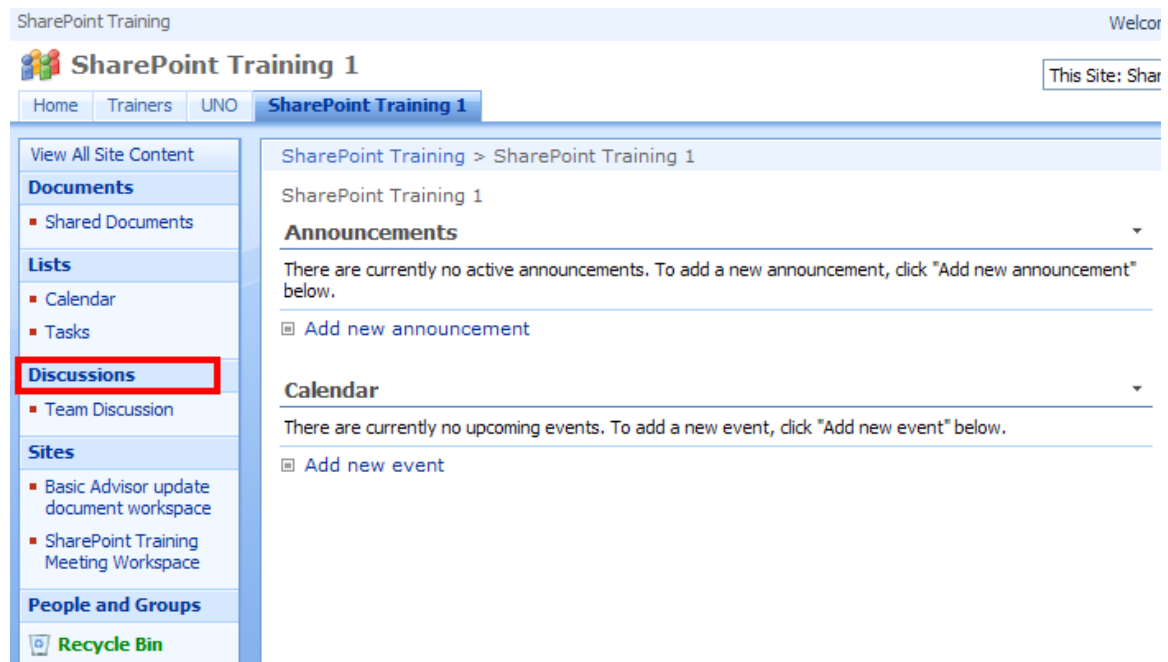
Creating and using a discussion board

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.

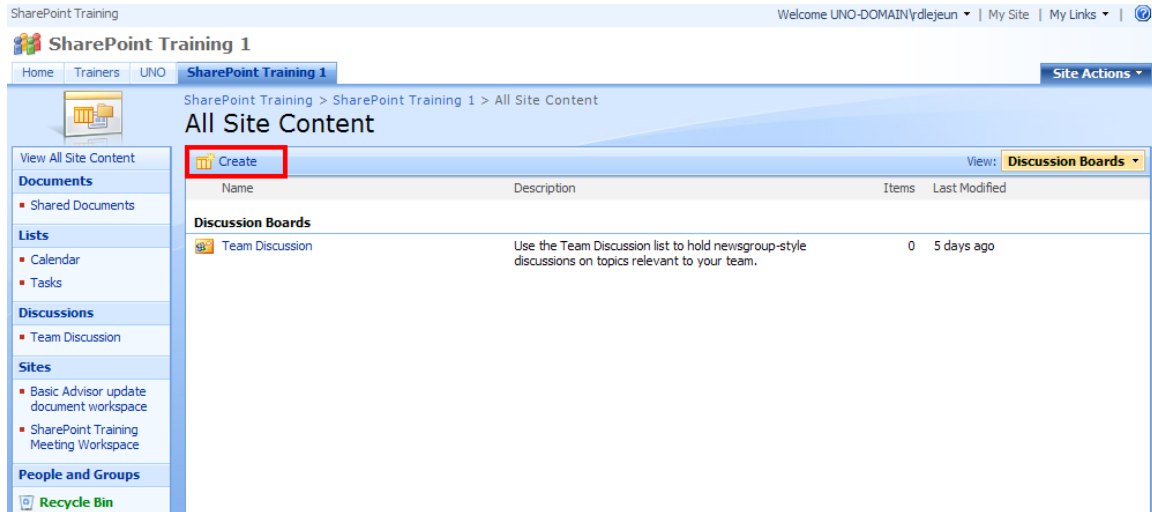
To create a new discussion board, add a new item, delete an item and remove the discussion board:

EXERCISE:

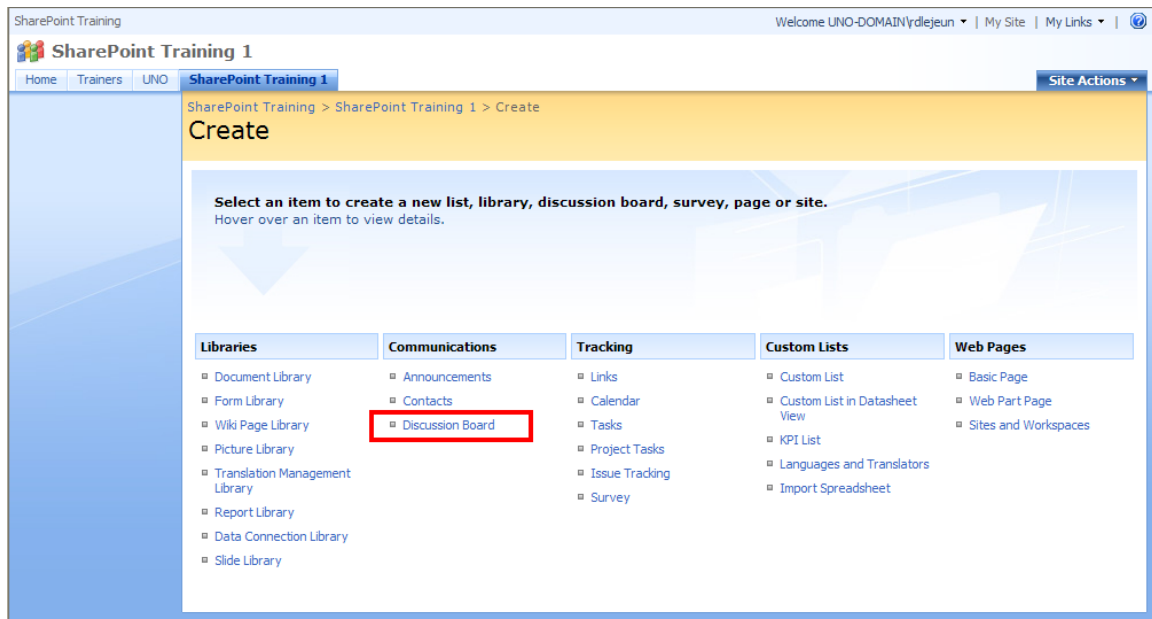
- 1) From the Quick Launch bar, click **Discussions**.



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**.

SharePoint Training

Welcome UNO-DOMAIN\ydejeun | My Site | My Links

SharePoint Training 1

Home Trainers UNO SharePoint Training 1 Site Actions

SharePoint Training > SharePoint Training 1 > Create > New

New

Name and Description
Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this list.

Name: SharePoint

Description:
Enter your comments...

Navigation
Specify whether a link to this list appears in the Quick Launch.

Display this list on the Quick Launch?
☒ Yes ☐ No

Create Cancel

5) The Discussion Board is now displayed on the Quick Launch under Discussions.

SharePoint Training

Welcome UNO-DOMAIN\ydejeun | My Site | My Links

SharePoint Training 1

Home Trainers UNO SharePoint Training 1 Site Actions

SharePoint Training > SharePoint Training 1 > SharePoint

SharePoint

Enter your comments...

New Actions Settings View: Subject

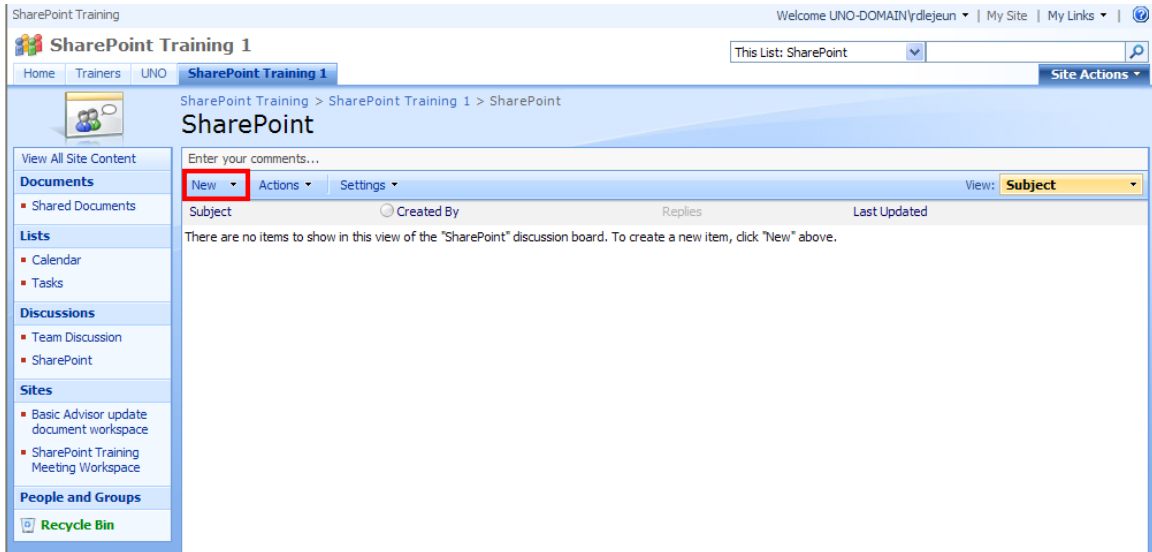
Subject Created By Replies Last Updated

There are no items to show in this view of the "SharePoint" discussion board. To create a new item, click "New" above.

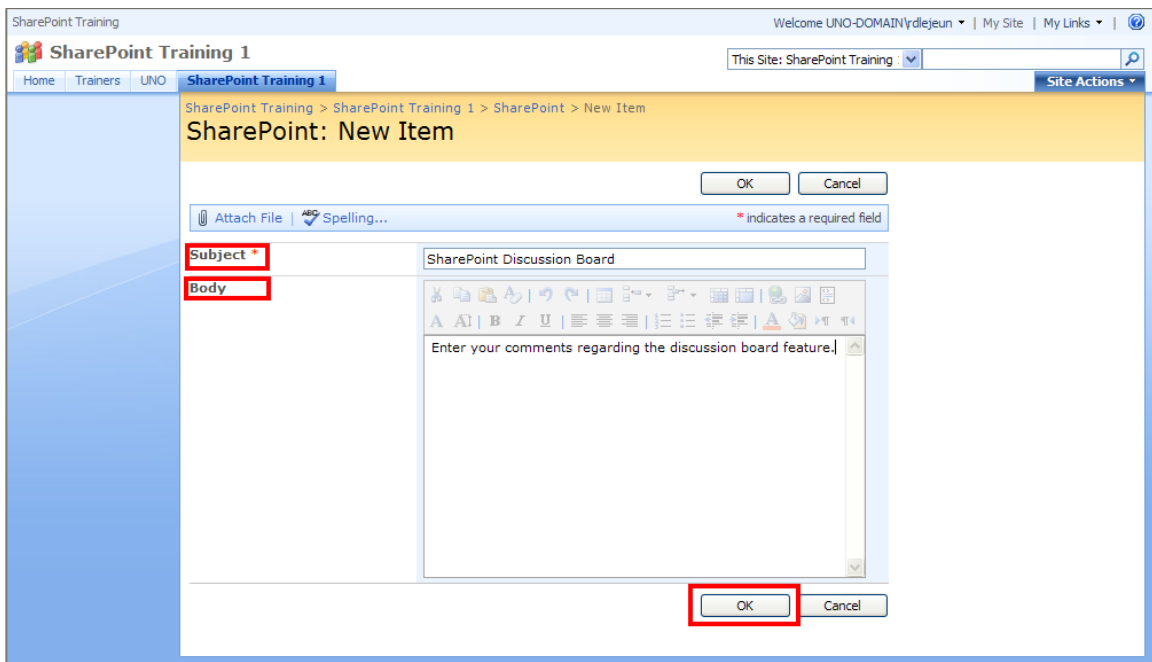
Quick Launch:

- View All Site Content
- Documents
 - Shared Documents
- Lists
 - Calendar
 - Tasks
- Discussions
 - Team Discussion
 - SharePoint**
- Sites
 - Basic Advisor update document workspace
 - SharePoint Training Meeting Workspace
- People and Groups
- Recycle Bin

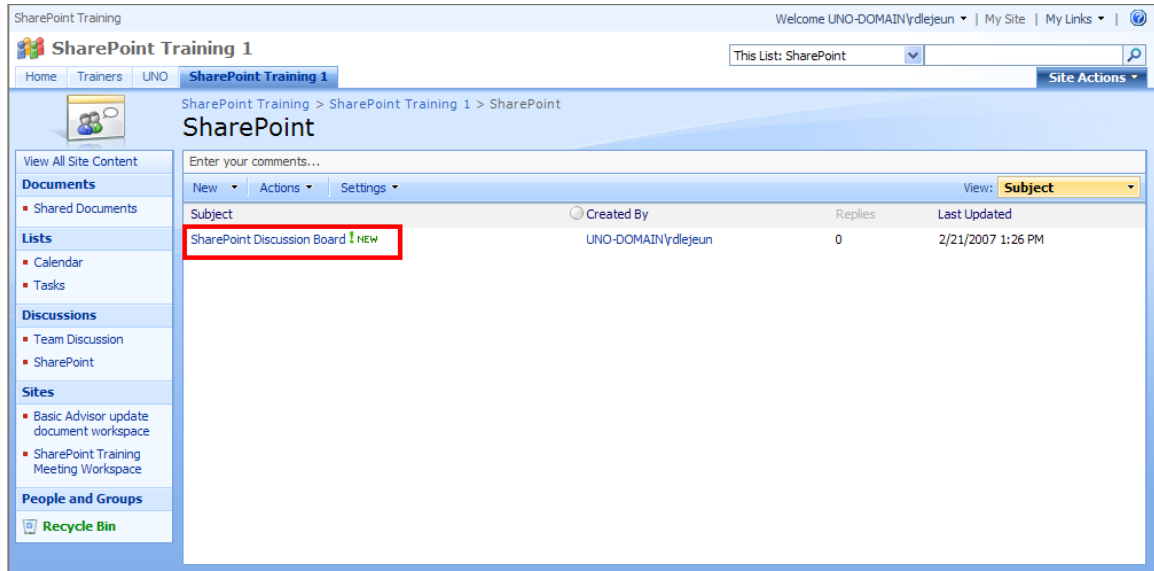
6) To add an item to the discussion board, click **New**.



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

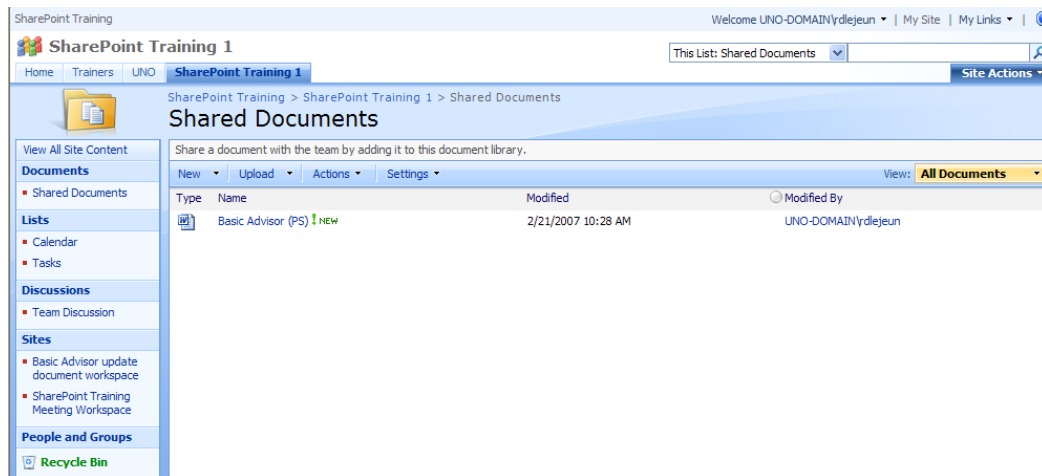
One of the primary uses of SharePoint is basic document management.

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.

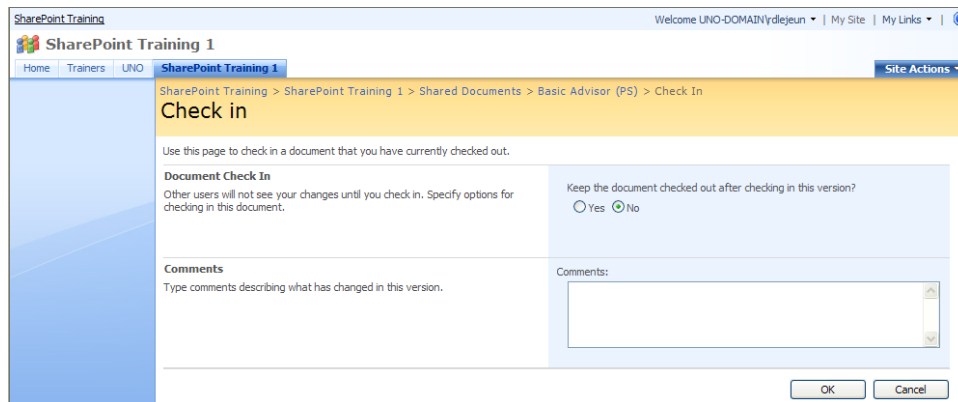
To check-out and check-in a document:

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**.

SharePoint Training

Welcome UNO-DOMAIN\ydlejeun | My Site | My Links

SharePoint Training 1

This List: Shared Documents

Home Trainers UNO SharePoint Training 1 Site Actions

SharePoint Training > SharePoint Training 1 > Shared Documents

Shared Documents

Share a document with the team by adding it to this document library.

New Upload Actions **Settings** View: All Documents

Type	Name	Modified	Modified By
	Basic Advisor (PS)	2/26/2007 9:05 AM	UNO-DOMAIN\ydlejeun

View All Site Content

Documents

- Shared Documents

Lists

- Calendar
- Tasks

Discussions

- Team Discussion

Sites

- Basic Advisor update document workspace
- SharePoint Training Meeting Workspace

People and Groups

Recycle Bin

2) From the Customize Shared Documents page, select **Versioning settings**.

SharePoint Training

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SharePoint Training 1

Home Trainers UNO SharePoint Training 1 Site Actions

SharePoint Training > SharePoint Training 1 > Shared Documents > Settings

Customize Shared Documents

List Information

Name: Shared Documents
Web Address: http://devspp.uno.edu/SPtraining1/Shared Documents/Forms/AllItems.aspx
Description: Share a document with the team by adding it to this document library.

General Settings

- Title, description and navigation
- Versioning settings**
- Advanced settings
- Audience targeting settings

Permissions and Management

- Delete this document library
- Save document library as template
- Permissions for this document library
- Manage checked out files
- Workflow settings
- Information management policy settings

Communications

- RSS settings

Columns

A column stores information about each document in the document library. The following columns are currently available in this document library:

Column (click to edit)	Type	Required
Title	Single line of text	
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

- Create column
- Add from existing site columns
- Column ordering
- Indexed columns

3) On the Document Library Versioning Settings page, set the parameters as appropriate for your needs and click **ok**.

SharePoint Training Welcome UNO-DOMAIN\jlejeun | My Site | My Links |

SharePoint Training 1

Home Trainers UNO SharePoint Training 1 Site Actions

SharePoint Training > SharePoint Training 1 > Shared Documents > Settings > Versioning Settings

Document Library Versioning Settings: Shared Documents

Content Approval

Specify whether new items or changes to existing items should remain in a draft state until they have been approved. [Learn about requiring approval.](#)

Require content approval for submitted items?

☐ Yes ☒ No

Document Version History

Specify whether a version is created each time you edit a file in this document library. [Learn about versions.](#)

Create a version each time you edit a file in this document library?

☐ No versioning

☐ Create major versions

Example: 1, 2, 3, 4

☒ Create major and minor (draft) versions

Example: 1.0, 1.1, 1.2, 2.0

Optionally limit the number of versions to retain:

☒ Keep the following number of major versions:

5

☐ Keep drafts for the following number of major versions:

Draft Item Security

Drafts are minor versions or items which have not been approved. Specify which users should be able to view drafts in this document library. [Learn about specifying who can view and edit drafts.](#)

Who should see draft items in this document library?

☒ Any user who can read items

☐ Only users who can edit items

☐ Only users who can approve items (and the author of the item)

Require Check Out

Specify whether users must check out documents before making changes in this document library. [Learn about requiring check out.](#)

Require documents to be checked out before they can be edited?

☒ Yes ☐ No

OK Cancel

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.

This website wants to run the following add-on: 'name.dll' from 'Microsoft Corporation'. If you trust the website and the add-on and want to allow it to run, click here...

SharePoint Training Welcome UNO-DOMAIN\jlejeun | My Site | My Links |

SharePoint Training 1

Home Trainers UNO SharePoint Training 1 Site Actions

SharePoint Training > SharePoint Training 1 > Shared Documents > Basic Advisor (PS) > Version History

Versions saved for Basic Advisor (PS).doc

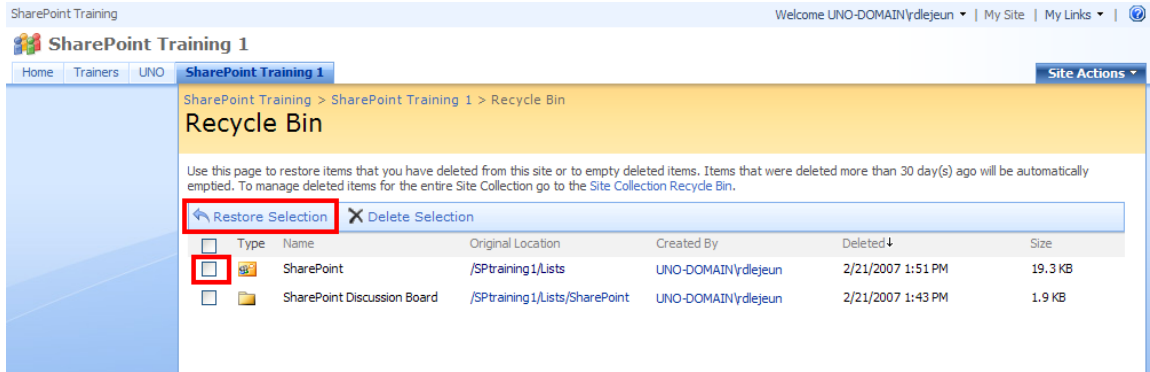
All versions of this document are listed below with the new value of any changed properties.

Delete All Versions | Delete Minor Versions

No. ↓	Modified	Modified By	Size	Comments
This is the current published major version				
1.0	2/26/2007 9:05 AM	UNO-DOMAIN\jlejeun	1.3 MB	Name changed

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**.

SharePoint Training

Welcome UNO-DOMAIN\vdlejeun | My Site | My Links

SharePoint Training 1

Home | Trainers | UNO | SharePoint Training 1 | Tasks | SharePoint Tasks | New Alert

New Alert

Use this page to create an e-mail alert notifying you when there are changes to the specified item, document, list, or library.

[View my existing alerts on this site.](#)

Alert Title
Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.

Send Alerts To
You can enter user names or e-mail addresses. Separate them with semicolons.

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

When to Send Alerts
Specify how frequently you want to be alerted.

Send me an alert when:

- ☒ Anything changes
- ☐ A task is assigned to me
- ☐ A task becomes complete
- ☐ A high priority task changes
- ☐ Someone else changes a task assigned to me
- ☐ Someone else changes a task
- ☐ Someone else changes a task created by me
- ☐ Someone else changes a task last modified by me
- ☐ Someone changes an item that appears in the following view:

My Tasks

Send e-mail immediately

☒ Send e-mail immediately

☐ Send a daily summary

☐ Send a weekly summary

Time: Wednesday 3:00 PM

OK Cancel

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.**

SharePoint Training 1

SharePoint Training > SharePoint Training 1 > Tasks > SharePoint Tasks > New Alert

New Alert

Use this page to create an e-mail alert notifying you when there are changes to the specified item, document, list, or library.

[View my existing alerts on this site.](#)

OK Cancel

Alert Title
Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.

Tasks: SharePoint Tasks

Send Alerts To
You can enter user names or e-mail addresses. Separate them with semicolons.

Users:
UNO-DOMAIN\rdlejeun

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:

- ☒ Anything changes
- ☐ A task is assigned to me
- ☐ A task becomes complete
- ☐ A high priority task changes
- ☐ Someone else changes a task assigned to me
- ☐ Someone else changes a task
- ☐ Someone else changes a task created by me
- ☐ Someone else changes a task last modified by me
- ☐ Someone changes an item that appears in the following view:
My Tasks

When to Send Alerts
Specify how frequently you want to be alerted.

☒ Send e-mail immediately
☐ Send a daily summary
☐ Send a weekly summary

Time:
Tuesday 2:00 PM

OK Cancel

- 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.**

SharePoint Training 1

SharePoint Training > SharePoint Training 1 > People and Groups > User Information > My Alerts on this Site

My Alerts on this Site

Use this page to manage the list of libraries, files, lists, and items for which you receive alerts. Note that some alerts, such as system generated task alerts, do not appear on this page. Click the name of an alert to edit its settings.

[Add Alert](#) [Delete Selected Alerts](#)

Alert Title	Frequency: Immediate
Tasks: SharePoint Tasks	<input checked="" type="checkbox"/>
Tasks: SharePoint Tasks	<input type="checkbox"/>

OK Cancel

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 allow 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**.

University of New Orleans Intranet Welcome Rhonda


 **University of New Orleans Intranet**


[Home](#) [Forms](#) [Chancellor](#) [Academic Affairs](#) [Student Affairs](#) [Business](#) [Education](#) [Engineering](#) [LiberalArts](#) [Sciences](#) [Metro](#) [Library](#)


Search for items containing:


This Site 


Results **1-10** of about 102. Your search took 2.98 seconds.
Results by Relevance | [View by Modified Date](#)

 [Community Viz](#)
<http://adminspp.uno.edu/business/btc/URL References/Community Viz.aspx> - 42KB - Patti Wolf

 [Community Activities Report](#)
<http://adminspp.uno.edu/business/btc/Shared Documents/Community Activities Report.doc> - 37KB - Employee

 [Holy Cross Community Group](#)
Holy Cross Community Group will continue drafting a Mainstreet grant proposal. Ken Walsh will facilitate use of GroupSystems GroupWriter software.
<http://adminspp.uno.edu/business/btc/Lists/Calendar/DispForm.aspx?ID=2> - Kenneth R. Walsh

 [Holy Cross Community Group](#)
Continue Main Street grant proposal. Group Writing facilitated by Ken Walsh
<http://adminspp.uno.edu/business/btc/Lists/Calendar/DispForm.aspx?ID=6> - Kenneth R. Walsh

 [Total Community Action.xml](#)
<http://adminspp.uno.edu/business/btc/Organizations/Total Community Action.xml> - 1KB - Kenneth R. Walsh

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>