

Windows Sharepoint Services (WSS) 3.0 Basics

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Windows SharePoint Services, or as this document will call it, SharePoint, is a Web based collaboration system using a Web browser (such as Internet Explorer) as the interface to access information and make changes.

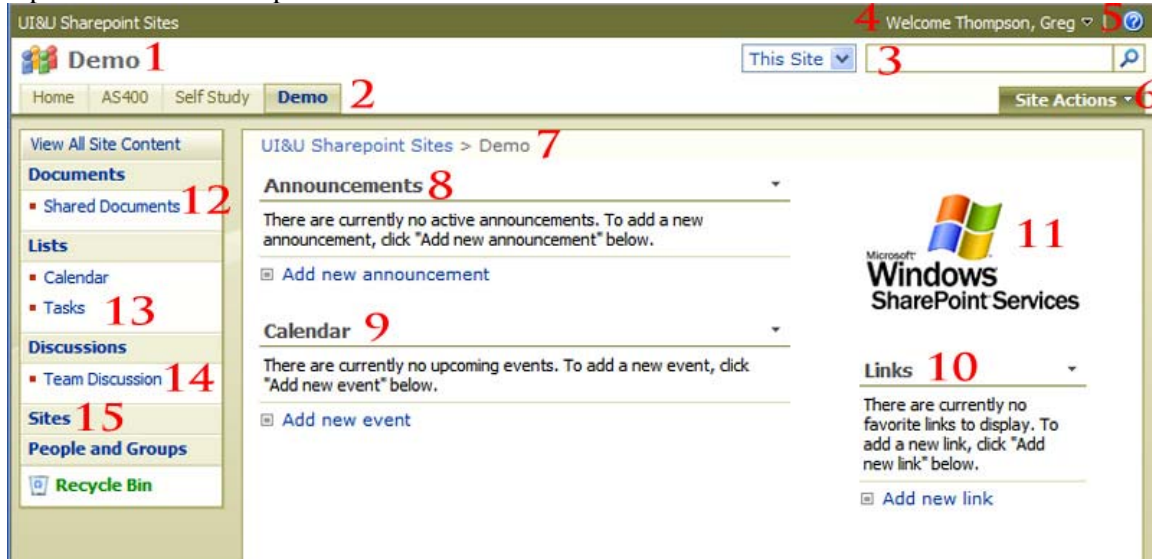
To begin, it is necessary to log into the SharePoint site. For this document, we will use the “Demo” site. There are two ways to access the site. If you are connected to the UI&U network, you can use the “short name” – <http://sharepoint/demo> . If you are accessing the site from home or anywhere outside the UI&U network, you will need to use the full name – <http://sharepoint.tui.edu/demo> . Please note the .tui.edu that was added to the address. This is what is called a Fully Qualified Domain Name (FQDN).

When accessing the site from within the UI&U network, SharePoint will detect your username and password and will automatically log you into the site. From outside the network, you will be prompted to enter your User name and Password. If using a Windows computer, your User name must be in the format tui-oh\username (replace username with your network login – last name and first initial usually). If using an Apple or Linux computer, you do NOT need to include the tui-oh\ as part of the User name. For Apple and Linux operating systems, Firefox is the recommended Internet browser. After entering your Username in the appropriate format, enter your network password. Below is an example for John Smith:



After logging in, you will see the standard SharePoint screen. SharePoint uses templates which provide a consistent look and feel among sites. Although SharePoint templates have the flexibility to be altered, in order to maintain consistency, UI&U has chosen to maintain the standard templates and has chosen a couple standard themes. The standard theme for most UI&U SharePoint sites is “Lichen.” Please choose this theme when setting up new sites and sub-sites (a sub-site may be a sub-committee, or a project team for the main site).

Below is the main page of a SharePoint site. A SharePoint site consists of “Web Parts.” The red numbers represent the different parts of the site.



1. The site title.
2. The Top Link bar shows the current site and other sites and links.
3. The Search Box. To search for content within “This Site” enter a search term or phrase and click the magnifying glass.
4. The title bar at the top right displays either your name (confirming who you are logged in as), or the words Sign In.
5. SharePoint Help. This is a great place to learn how to use the different parts of SharePoint.
6. Site Actions allow Site Owners to edit their Site Settings, and to Create new content in the site (new document libraries, new pages, etc.). Most people are only Site Members and will not have the same options. And Site Readers only have read access to the site.
7. The “bread crumb” trail shows where you are currently located in the site and gives you an easy way to go back to other parts of the site.
8. Announcements allow you to provide information to people as soon as they enter the site. Announcements can include attachments and can also be set to expire on specific dates.
9. The Calendar lets you add events to the site. Calendar entries can be specific times (e.g. meetings) or can span days. They can also include attachments.
10. Links are simply Internet Links to Web sites (both internal to UI&U and external).
11. The site image is often a logo or meaningful graphic.
12. Documents is the most important and most frequently used part of SharePoint. Under Documents, there is a default document library (a library is a collection of files) called Shared Documents. You will probably want to create additional document libraries, such as Minutes, or Documentation.
13. Tasks is under the Lists heading. In many ways similar to calendar entries, you can create tasks and assign them to people (only one person per task).
14. Team Discussion is the same as a threaded discussion. You can post a message or topic and people can reply to it.
15. Sites will list any sub-sites for your current site.

Those are the main areas of SharePoint.

Overview

Site Actions

SharePoint is set up in separate, stacked blocks (web parts), when creating/editing you only affect those things in/under the block you are working in. Commands start at the top of the block. Their placement indicates what block they manipulate. Sitting atop the outer most block is the Site Actions command. Notice, name is Site Actions, placement is outer most block, it manipulates the site itself and everything under it.

There are three main functions under Site Actions. Create is used to add new items in existing blocks. It adds space or creates 'file drawers' (libraries) to hold stacks of information. Site Settings allows those things already created to be edited. The third function, Edit, allows for the manipulation of the blocks (web parts) themselves. It is recommended most users leave this function alone.

Create

There are several ways to access the Create commands. This and most of the specific functions accessible through it will be addressed in the step-by-step instructions, for now, let's look at the main sections. Create, adds new areas or 'file drawers' to hold stacks of different types of information.

The Libraries section tends to hold the more traditional files; computer documents, forms, pictures, ext. Although the functions available through SharePoint are much more than just holding documents in a drawer, such as the ability to check documents in and out, create and store sequential versions of documents, and hold drafts for approval.

Communications is fairly self explanatory and involves announcements, contacts, and discussion boards. See the step-by-step for further explanation of these.

Tracking allows 'drawer' set up to follow or track information. Some familiar ones might be Calendars and links but SharePoint also includes the ability to administer and track surveys as well as task tracking. Far more than the to-do list of old, task tracking on SharePoint allows for tasks to be automatically passed through a preset workflow process, interconnected issues relating to different tasks to be outlined and connected, and tasks to be assigned, given deadlines, and graphed along their progress.

Custom Lists allows for flexibility in creating lists and Web Pages. This is a more advanced function.

Site Settings

Settings is where editing and formatting takes place. Site Settings, edits the site. Document Library Settings edits a Document Library. List Settings edits a lists, etc. There is only one section under Site Settings most people will need to use, and unless you are an administrator it is highly recommended most of these sections are left alone, especially Galleries and Site Administration. What you will need to know about is Look and Feel. If you are setting up a new site, use Site Theme should be set to Lichen. This is the theme for all UI&U SharePoint sites. The Main section most people will use is Title, Description, and Icon. Like its name implies it lets you edit the title description and icon for each block. Note the icon under Site Actions is the graphic next to your group name on the Site Title Bar, not the larger site image.

Quick Launch

The block to the far left of the screen under the Top Link bar, is the Quick Launch. Placed here are those things you would want to access quickly with out having to dig further into the site. The View All Site Content link at the top of this block gives access to all the content on the site. It also gives access to the Create command discussed under Site Actions, allowing different types of 'file drawers' to be created.

Basic Command Keys

No matter what 'file drawer' you are in the basic command keys are all relatively similar and serve the same basic functions. New is used to add either single items or folders to the 'drawer.' Upload allows you to load items either as a group or one at a time directly from your computer. Actions manipulates the items already in the 'drawer.' And Settings allows you to manipulate or edit the drawer it self. Settings is recommended only for advanced users.

Web Parts: Step-by-Step

Announcements

- 1) Go to "View All Site Content"
- 2) Click "Announcements"
- 3) Click the arrow next to New
- 4) Click "New"
- 5) Fill in the Title and Body of the announcement
- 6) Pick an expiration date for the announcement by clicking on the calendar icon and navigating to the date. Leaving it blank means it will never expire.
 - When the announcement expires it will no longer be displaced on the main page but it can still be accessed under the announcement section.
- 7) To attach a file to the announcement click on "Attach File" at the top of the block.
 - a. Click "Browse"
 - b. Find the document on your computer, highlight it by clicking on it and hit "open"
 - c. Click "OK"
- 8) Hit "OK"

Calendars

Add a Calendar (file drawer)

- 1) Go to "View all Site Content"
- 2) Click "Create"
- 3) Click "Calendar"
- 4) Fill in name and description
- 5) Decide if you wish to have the calendar appear in the Quick Launch and mark the appropriate selection under "Navigation"
- 6) Click "Create"

Add an Item to an Existing Calendar

- 1) If the calendar exists in the Quick Launch, select it. If not, go to "View all Site Content" and select the calendar.
- 2) Select the arrow next to "New"
- 3) Click "New Item"
- 4) Fill in the title, location, and description of item.
- 5) Fill in the start date by right clicking on the calendar icon next to start "Start Time," navigating to the appropriate date, and clicking on the date.
- 6) Fill in the time of the item by using the drop down menus next to the calendar icon.
- 7) Repeat steps 5 and 6 next to "End Time"
- 8) If the event is all day, mark the box next to "Make this an all-day activity that doesn't start or end at a specific hour."
- 9) If the event is recurring, mark the box next to "Make This a Repeating Event."
 - a. Fill in the recurring data by marking the appropriate section and using the calendar icon.
- 10) To attach a file to the announcement click on "Attach File" at the top of the block.
 - a. Click "Browse"
 - b. Find the document on your computer, highlight it by clicking on it and hit "open"
 - c. Click "OK"

- 11) Creating a “Workspace” sets up a new page within SharePoint for use with the item on the calendar. If you are not familiar with setting up SharePoint pages, this step is not recommended.
- 12) Click “OK”

Links

- 1) Go to “View All Site Content”
- 2) Click “Links”
- 3) Click the arrow next to New
- 4) Click “New Item”
- 5) Insert the complete link you wish to include
This can be copied and pasted from the site or typed in by hand
- 6) Fill in the description
- 7) Add any notes you wish
- 8) Click “OK”

Documents

Create a Document Library (file drawer)

- 1) Click “Documents”
- 2) Click “Create”
- 3) Click “Document Library”
- 4) Fill in the name and description of the Library
- 5) Decided if you wish this document library to be displayed on the quick launch and mark the appropriate section under “Navigation”
- 6) Decided if you wish a version of the document saved when it is updated and make the appropriate selection under “Document Version History”
- 7) Document Template default is “Microsoft Office World 97-2003” change this if you need to from the drop down list.
- 8) Click “Create.”

Upload a Document

- 1) Select the Document Library (file drawer) you wish to place the document or documents in.
- 2) Hit the arrow next to “upload”
- 3) To upload a single document
 - a. Click “Upload Document”
 - b. Click “Browse”
 - c. Find the document on your computer. Highlight it by clicking on it and hit open
 - d. If you do not wish to overwrite any existing file by the same name, un-check the box “overwrite existing files”
 - e. Click “OK”
- 4) To upload multiple documents
 - a. Click “Upload Multiple Documents”
 - b. Find where on your computer the files are located from the list on the left
 - c. Check the box next to the files you wish to upload.
 - d. If you do not wish to overwrite any existing file by the same name, un-check the box “overwrite existing files”
 - e. Click “OK”

--Note: SharePoint will not upload documents with & in the file name. If you attempt to download a document with & in the name, SharePoint stop uploading all of the documents at that point.

Document Check Out

- 1) Go to where the document you wish to check out is located.
- 2) Hit the arrow at the end of the name to make the drop down menu appear.
- 3) Hit “Check Out”
A small green box with an arrow in it will appear next to the document icon
- 4) Click on the document

- 5) Hit "OK"
- 6) When you are done editing the document, save and close it.
- 7) A box will appear asking if you wish to
 - a. Check in the file (return the file so another can use it)
 - b. Keep file checked out (close the file but keep it so others may not use it)
 - c. Discard changes and undo check out (return the file so others can use it, without any of the changes saved)
- 8) Mark which you would like and click "OK"
- 9) If you chose to "Check in the file" a box will appear allowing you to leave a message to go along with the document. Decide if you wish to leave a message.
- 10) Click "OK"

Alerts

- You can choose "alert me" from any Actions drop down menu
- To add an alert for a specific item you can go directly to the item and choose "alert me" from the drop down menu.
- To add multiple people to any alert hit the address book icon and follow the step you would follow when adding multiple people to a group.

Surveys

- 1) If Surveys exists in the Quick Launch, select it. If not, go to "View all Site Content"
- 2) Click "Create"
- 3) Click "Survey"
- 4) Fill in name and description.
- 5) Decide if you wish this Survey to be displayed on the quick launch and mark the appropriate section under "Navigation"
- 6) Decide on the Survey Options and mark the appropriate responses
- 7) Click "Next."
- 8) Type your question in the "Question" Box
- 9) Choose the type of answer and fill in the rest of the page depending on the type of answer you choose
- 10) Click "Next Question" and repeat the process until all questions have been added.
- 11) Click "Finish"

Note: Branching, also known as skip logic, is a way for a survey to branch to or skip questions based on the answers given to others questions. This can be helpful but is also tricky to set up. Make sure you are comfortable with the program before attempting.

Discussion

Create a new Discussion Board (file drawer)

- 1) If Discussions exists in the Quick Launch, select it. If not, go to "View all Site Content"
- 2) Click "Create"
- 3) Click "Discussion Board"
- 4) Fill in name and description
- 5) Make sure there is a mark next to the "Yes" under "Display this list on the Quick Launch"
- 6) Click "Create"

Post a Discussion

- 1) Click on the arrow next to the "New" tab
- 2) Hit "New"
- 3) Fill in subject and body
- 4) Hit "OK"

Tasks

Tasks List (file drawer)

- 1) If Lists exists in the Quick Launch, select it. If not, go to "View all Site Content"

- 2) Click "Create"
- 3) Click "Task"
- 4) Fill in name and description
- 5) Decide if you wish this document library to be displayed on the quick launch and mark the appropriate section under "Navigation"
- 6) Decide if you wish to have e-mail notification sent when a new task is assigned. Mark the appropriate section under "E-Mail Notification".
- 7) Click "Create"

Adding to a Task List

- 1) If the task list exists in the Quick Launch, select it. If not, go to "View all Site Content" and select the task list you wish to add to.
- 2) Click on the arrow next to the "New" tab.
- 3) Click "New Item"
- 4) Fill in the information.
 - a. For "Assigned to"
 - i. Click the address book located at the end of the line.
 - ii. Type in the first few letters of the persons last name
 - iii. Hit the "enter" key
 - iv. Make sure the person's name is lighted.
 - v. Click "OK"
- 5) Click "OK"

Adding Site Members

- 1) Click on "People and Groups."
- 2) Click on the arrow next to the "New" tab.
- 3) Hit "Add Users" off the pull down menu.
- 4) Click on the address book icon below the white box labeled "Users/Groups."
- 5) In the Find bar at the top of the box, type in the first few letters of the person's last name, hit the enter key on your keyboard.
- 6) When the person's name shows up, make sure is it highlighted and hit the "Add" button.
- 7) Go back up to the Find bar and repeat the process until all members have been added.
- 8) Hit "OK" at the bottom.
- 9) Under the heading "Give Permission" hit the circle next to "Add users to a SharePoint group" to make a mark appear.
- 10) The text box should read "<site> Members [Contribute]." This sets the permission level your members will have. If the text does not appear hit the arrow next to the text and highlight the correct selection.
- 11) Under the heading "Send welcome e-mail to the new users" hit the box to make a check mark appear and a generic SharePoint welcome will be sent along with the general access information.
- 12) Feel free to add your own personal message under "Personal Message" and this will be sent along as well.

Pictures

Picture Library (file drawerer)

- 1) Go to "View all Site Content"
- 2) Click "Create"
- 3) Click "Picture Library"
- 4) Fill in name and description.
- 5) Decide if you wish this Picture Library to be displayed on the quick launch and mark the appropriate section under "Navigation"
- 6) Decide if you wish to create a version each time you edit a file in the picture library and mark the appropriate section "Document Version History".
- 7) Hit "Create"

Upload a Picture

- 1) Go to “View All Site Content”
- 2) Select the picture library you wish to upload the picture to.
- 3) Click the arrow next to “Upload”
- 4) To upload a single picture
 - a. Click “Upload Picture”
 - b. Click “Browse”
 - c. Find the picture on your computer, highlight it and hit open.
 - d. If you do not wish to overwrite any existing file by the same name, un-check the box “overwrite existing files”
 - e. Click “OK”
- 5) To upload multiple pictures
 - a. Click “Upload Multiple Pictures”
 - b. Find where on your computer the files are located from the list on the left.
 - c. While holding down the control key, left click on the pictures you wish to upload.
 - d. Decide what transfer size you wish and mark it under Upload Settings.
 - e. Click “upload and close”
 - f. Click “Go back to *folder name*”

Move a picture

- 1) Go to “View All Site Content”
- 2) Select the picture library in which the picture you wish to move is located.
- 3) Left click on the photo 3 times or until the photo is on its own page.
- 4) Copy the name of the photo starting with the / after the word the word indicating the main page.
Do not copy `http://sharepoint/mainpagename`
Example
Full name = `http://sharepoint/demo/training0/test/pic.JPG`
Correct copy = `/training0/test/pic.JPG`
- 5) Navigate to the place in the site you wish to paste the photo. You may need to use your browsers back button for your first move away from the picture.
- 6) Paste the name of the photo you copied
- 7) Place a .. (two periods) before the name you just pasted in step 6
Example
`../training0/test/pic.JPG`
- 8) Click “OK”