



# Microsoft SharePoint 2007

## Level One



Steve Linton-Smith  
Computer Training Coordinator  
Information & Telecommunication Services  
slintonsmith@alachuacounty.us  
(352) 338-7320

# Microsoft SharePoint 2007

## Level One

### C o n t e n t s

<b>What is SharePoint?</b> _____	<b>1</b>
Why Use SharePoint? _____	1
SharePoint Basics _____	1
<b>Navigating in SharePoint</b> _____	<b>2</b>
Main SharePoint Portal _____	2
Key Components of a Site _____	2
<b>Lists</b> _____	<b>3</b>
Creating a List _____	3
Create New List Item _____	4
Filter and Sort _____	4
Datasheet View _____	4
Modifying a View _____	5
Adding Columns _____	6
<b>Permissions</b> _____	<b>7</b>
Site Level Permissions _____	7
Permissions at the List/Library Level _____	8
Requesting Access _____	8
<b>Discussion Boards</b> _____	<b>9</b>
Create a New Discussion _____	9
Edit a Topic _____	9
Reply to a Topic _____	9
Change the View _____	10
<b>The Calendar</b> _____	<b>10</b>
<b>Meeting Workspaces</b> _____	<b>13</b>
Recurring Meeting Workspace _____	13
Create a Meeting Workspace From SharePoint _____	14
Create a Meeting Workspace With Outlook Meeting Request _____	16
<b>Libraries</b> _____	<b>17</b>
Adding Files to a Document Library _____	17
Viewing or Editing a File in a Document Library _____	19
<b>File Check Out &amp; Versioning</b> _____	<b>19</b>
Checking a File In & Out _____	19
Check Out a File _____	20
Check In a File _____	20
Versioning _____	21
<b>Alerts</b> _____	<b>22</b>
<b>My Site</b> _____	<b>23</b>
Accessing Your My Site _____	23
My Home _____	24
My Profile _____	25
My Links _____	25

*Prepared by:*  
Steve Linton-Smith  
July 30, 2008

*For Assistance:*  
ITS Help Desk  
(352) 338-7329

# What is SharePoint?

---

SharePoint is a centralized storage and collaboration space for documents, information, ideas and much more. This web-based tool is integrated with Microsoft Office to help groups of people share information and work together seamlessly. For example, a SharePoint site can help you:

- Coordinate projects, calendars, and schedules.
- Discuss ideas and review documents or proposals.
- Share information on a single, unified platform.

SharePoint sites are dynamic and interactive -- members of the site can contribute their own ideas and content as well as comment on or contribute on a colleague's content. Through the use of permissions, site owners can also customize site access and/or file access privileges.



## Why Use SharePoint?

- **E-Mail is Linear:** Changes cannot be seen until the recipient of the e-mail sends it back to others.
- **Common Network Drives:** Files can be accidentally overwritten.
- **Greater control:** You can make changes to site design, posting of files and access rights.

## SharePoint Basics

There are two very broad types of SharePoint sites – the Collaboration Site and the My Site.

- **Collaboration Site:** Designed around a topic, department, mission, etc. Any user can be assigned as the "owner" of the site.
- **My Site:** Specifically named and dedicated to one user. Ownership cannot be assigned to anyone except for the named user.

## Site Categories

1. **Team Sites:** All purpose site used to facilitate team collaboration
2. **Document Workspaces:** Development and management of documents, usually with no sub-sites.
3. **Wiki Site:** Capture ideas that aren't in document format. Information is grouped by topic. Wikis are often creative forums that allow for an easy exchange of ideas.
4. **Meeting Workspaces:** Plan meetings, share meeting materials, track past meeting action items.
5. **Blog Sites:** Capture and manage discussions around a topic. Often targeted at a large audience.

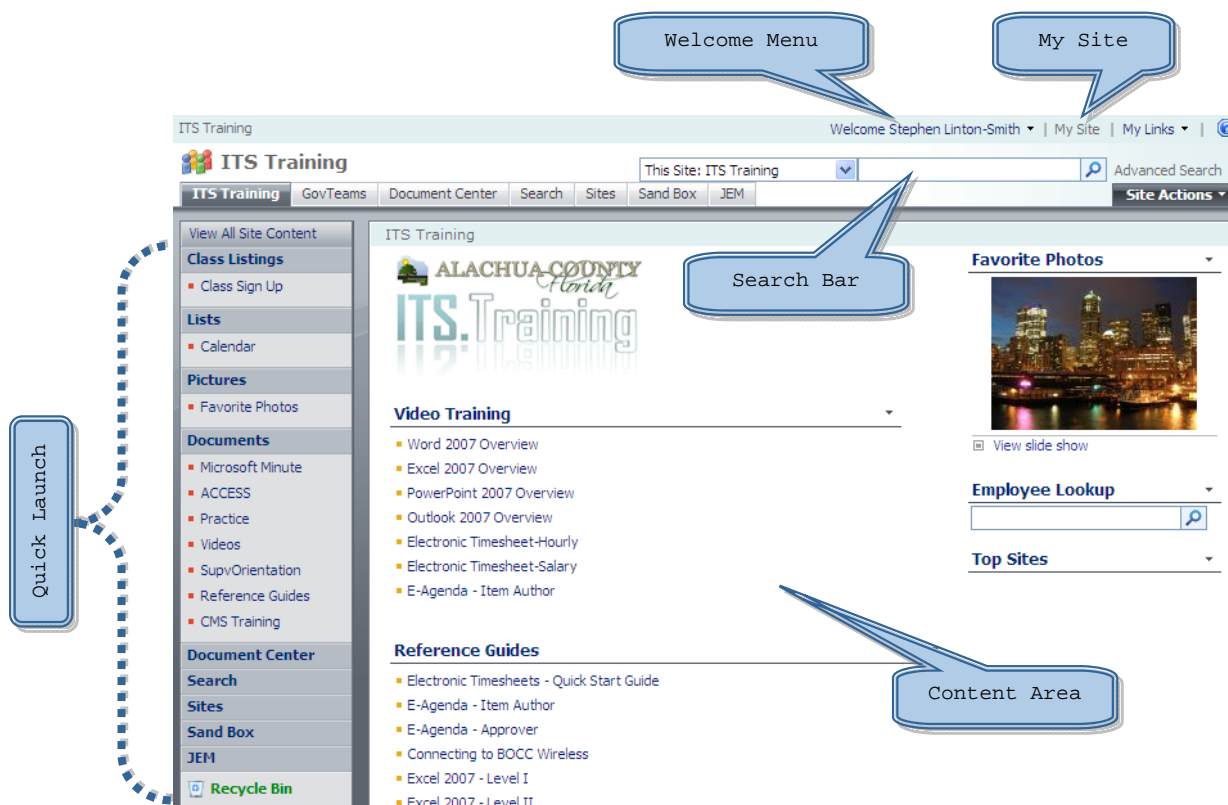
# Navigating in SharePoint

## Main SharePoint Portal

Most sites are accessible from the following site: <http://govteams>. From this site click the **DEPARTMENTS/OFFICES** link on the navigation bar. Here you will find many County departments and functional groups.

## Key Components of a Site

- **Welcome Menu:** This menu displays the username of the currently logged in user. If someone else needs to access their own SharePoint sites with their associated permissions, they can choose **SIGN IN AS A DIFFERENT USER** from this menu. This saves the trouble of having to log off from Windows.
- **My Site:** Every user has their own **MY SITE**. This site is another option for collaboration and has similar functionality to other **TEAM SITES**.
- **The Quick Launch:** This pane on the left hand side provides quick access to **SITES**, **LIBRARIES** and **LISTS** found on that particular site.
- **Search:** To help you find information on a site you can use the **SEARCH BAR** across the top or on the **QUICK LAUNCH**.
  - The **BASIC SEARCH** is accessible from the top of every page. Search scopes include: ALL SITES, THIS SITE, THIS LIST
  - The **ADVANCED SEARCH** is accessible by a link at the top of every page. This search includes numerous options for narrowing your search by date, specific words in phrases, etc.
  - The **PEOPLE** search scope will locate the My Site of any name entered in the search field.



# Lists

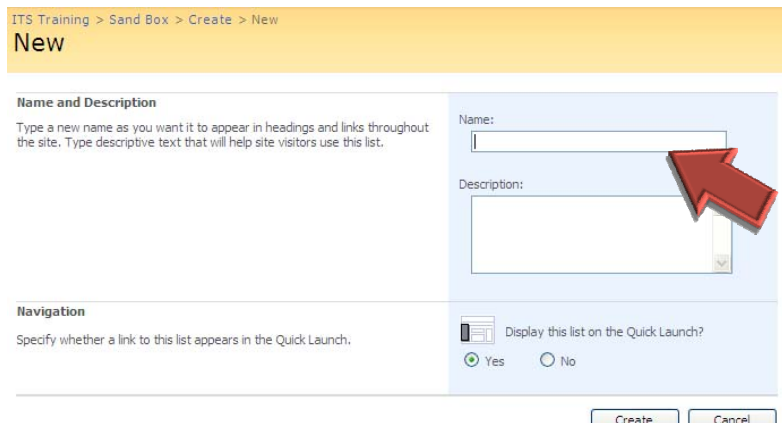
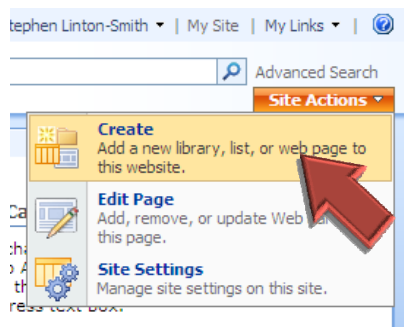
Most of the information stored or created within SharePoint is organized into lists of related items. Types of lists include:

- Announcements
- Calendars
- Links
- Tasks
- Discussions

## Creating a List

Each SharePoint site comes with several default lists: **CALENDAR**, **TASKS**, etc. However, you can create additional lists to suit your needs. For example, you can create the more generic **ANNOUNCEMENT** list. Keep in mind that you must have at least **DESIGNER** permissions to create a list. (*Permissions* are discussed in the next section.)

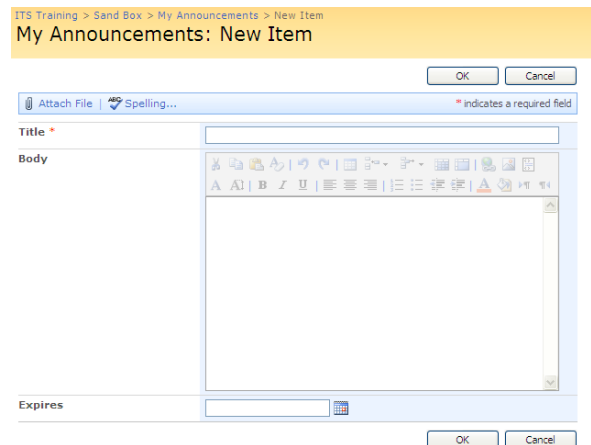
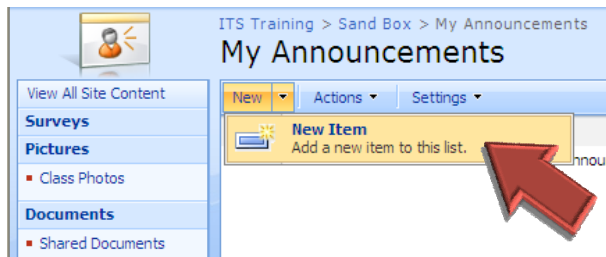
1. In the upper right corner of a site, click **SITE ACTIONS > CREATE**
2. Select your list type - for this example we'll use **ANNOUNCEMENTS**
3. Give your new list a **NAME** and a **DESCRIPTION**
4. Ensure that **YES** is selected under **DISPLAY THIS LIST IN THE QUICK LAUNCH**
5. Click **CREATE**



## Create New List Item

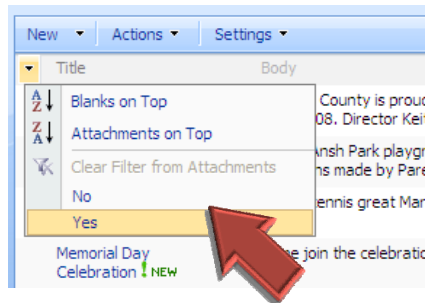
Now that you have created a list, you'll want to add items to that list.

1. Navigate to your list
2. Click **NEW** on the toolbar and select **NEW ITEM**
3. Enter a **TITLE** and **BODY** for your item
4. [Optional] Click the attach file button to browse for a file to attach
5. [Optional] Selecting an expiration date will ensure that old announcements will no longer appear
6. New items will display **!NEW** next to the title for the first 24 hours after it is added to the list



## Filter and Sort

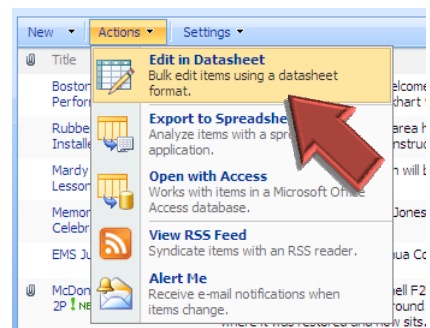
You can **SORT** by any column in the list by clicking on a column header. To **FILTER** a list, hover over any column header and click the down pointing arrow. Each unique value or text entry will be displayed on that menu. Select the desired item on that menu to filter the list. In the below example, you could filter this list to show only list items which have an attachment.



## Datasheet View

Sometimes, updating a list is easier to do from a **DATASHEET VIEW** rather than the **STANDARD VIEW**. To edit a list of items in **DATASHEET VIEW**:

1. Click the **ACTIONS** button on the toolbar
2. Select **EDIT IN DATASHEET**
3. Files can be attached from here by double clicking in the attachments column (paper clip)



	Title	Body	Modified By
	Boston Pops to Perform	Alachua County is proud to welcome the Boston Pops Esplanade Orchestra to the Downtown Community Plaza on 4/12/2008. Director Keith Lockhart to lead a 45 piece orchestra under the stars.	WS1 Training Room
	Rubberized Surface Installed	The McAnsh Park playground area has been upgraded with a new rubberized surface to shield against child injuries. Donations made by Parent Construction.	WS1 Training Room
	Mardy Fish Tennis Lessons	Famed tennis great Mardy Fish will be conducting tennis lessons for children age 7 - 10 this coming Saturday.	ws3
	Memorial Day Celebration	Come join the celebrations at Jonesville State Park for Memorial Day.	ws3
	EMS June Update	The State of Florida and Alachua County remained free of major incidents during the month of June.	Stephen Linton-Smith

## Modifying a View

If any columns are not visible in either **DATASHEET** or **LIST** view, you can choose to show them by modifying the view from the **ALL ITEMS** menu.

1. Click **ALL ITEMS > MODIFY THIS VIEW**
2. Select your desired **COLUMN NAME** from the list and/or modify the **POSITION FROM LEFT**
3. Click **OK**
4. *Note:* to modify the view you must have **MANAGE HIERARCHY** rights or above (See *Permissions*)



View Name:

Web address of this view:  
<http://govteams/sites/training/pocahontas/Lists/My Announcements/AllItems.aspx>

This view appears by default when visitors follow a link to this list. If you want to delete this view, first make another view the default.

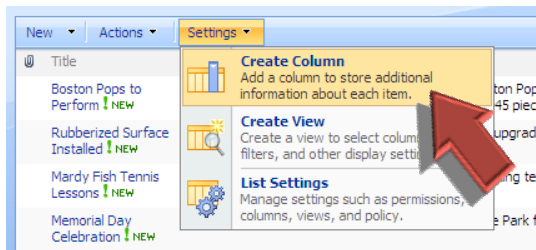
Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Attachments	1
<input checked="" type="checkbox"/>	Title (linked to item with edit menu)	2
<input checked="" type="checkbox"/>	Body	3
<input checked="" type="checkbox"/>	Modified By	4
<input type="checkbox"/>	Modified	5
<input type="checkbox"/>	Content Type	6
<input type="checkbox"/>	Created	7
<input type="checkbox"/>	Created By	8
<input type="checkbox"/>	Edit (link to edit item)	9
<input type="checkbox"/>	Expires	10
<input type="checkbox"/>	ID	11
<input type="checkbox"/>	Title	12
<input type="checkbox"/>	Title (linked to item)	13
<input type="checkbox"/>	Type (icon linked to document)	14
<input type="checkbox"/>	Version	15

## Adding Columns

Each list, by default contains the following columns: **ATTACHMENTS**, **TITLE**, **MODIFIED**. To create additional columns, follow the directions below:

1. Click **SETTINGS > CREATE COLUMN**
2. Enter a name in the **COLUMN NAME** field
3. Select the **TYPE OF INFORMATION THIS COLUMN IS** to contain
4. In this example, the **YES/NO (CHECKBOX)** option will be selected with the title "Press Notified"
5. This brings you to the options for that particular information type
6. Select the desired **DEFAULT VALUE** for new items
  - a. **YES** means the box will be checked by default
  - b. **NO** means the box will be unchecked by default
7. Click **OK**

Step 1: Create the column



Step 2: Enter column name & options

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- Business data

Description:

Default value:

Add to default view

Step 3: Create new list item with the new Yes/No checkbox

A screenshot of a 'New' form window. The 'Title' field is empty. The 'Body' field contains a rich text editor. The 'Expires' field is empty. The 'Press Notified' checkbox is checked with a red arrow. 'OK' and 'Cancel' buttons are at the bottom right.

Step 4: Note the new column in the list view

A screenshot of a list view showing the new column 'Press Notified'. A red arrow points to the new column header. The list contains several items with their 'Press Notified' status.

Title	Press Notified	Body
Boston Pops to Perform	Yes	Alachua County is proud to welcome the Plaza on 4/12/2008. Director Keith Lock
EMS June Update	No	The State of Florida and Alachua County
Mardy Fish Tennis Lessons	No	amed tennis great Mardy Fish will be co
McDonnell F2H-2P	Yes	59 to 1988, a McDonnell F2H-2P with cement and buried in sand on Aviation, Pensacola (FL) where it War.

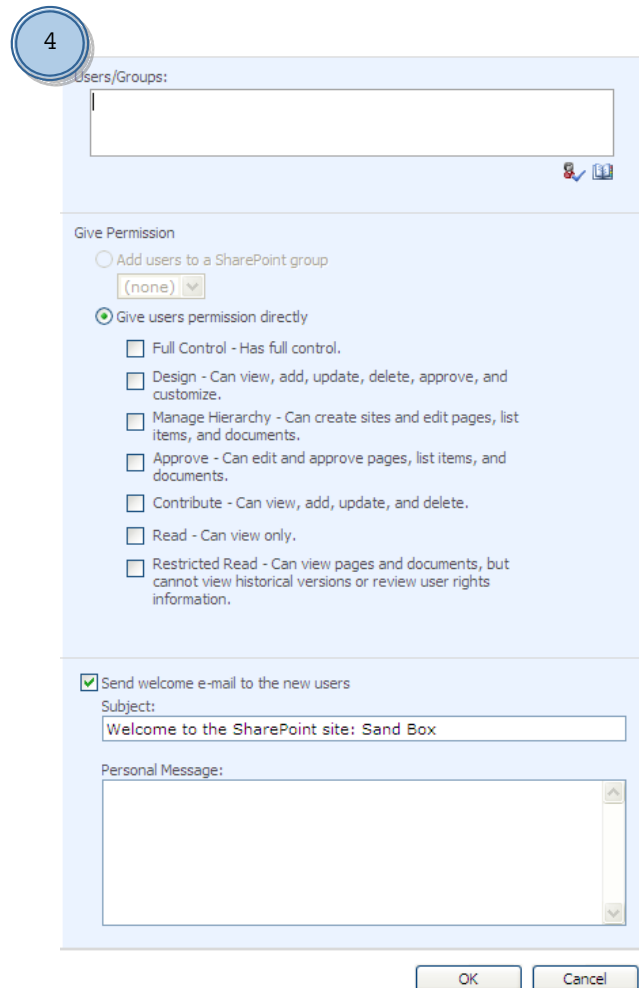
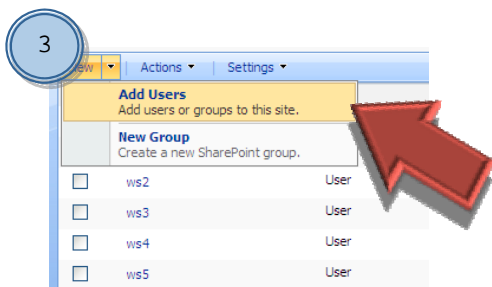
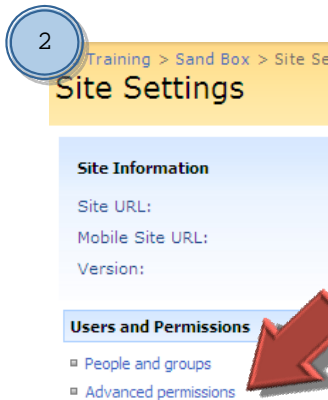
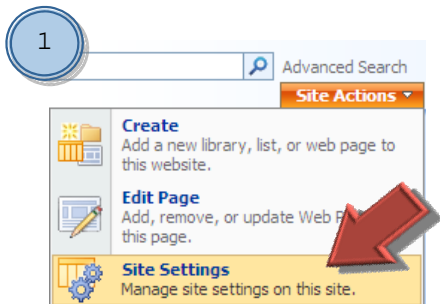
# Permissions

Permissions define what a user can do to a site, file or item. The most common permission levels are **READ** (view only) and **CONTRIBUTE** (view, add, update or delete). Permissions can also be customized at three levels: **SITE**, **LIST/LIBRARY** and **ITEM** levels. For example, you could grant a user **READ** permissions to a particular site and **CONTRIBUTE** permissions to one library on that site.

## Site Level Permissions

Only those with **FULL CONTROL** permissions can grant others access to a site or modify permissions for existing site members. To modify site level permissions, follow the directions below:

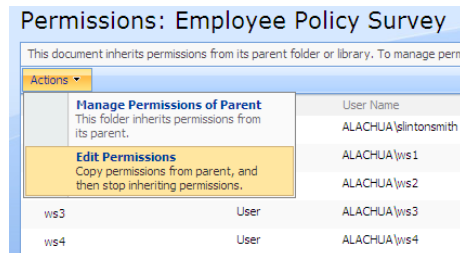
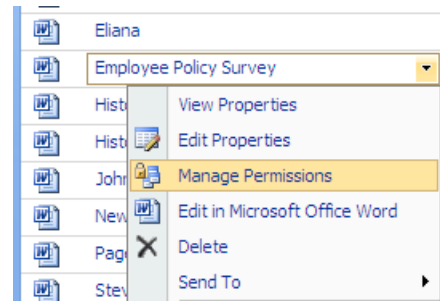
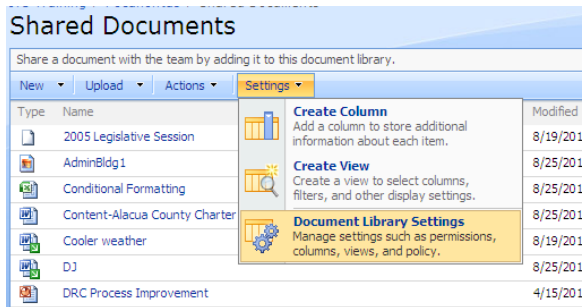
1. From the site home page, click **SITE ACTIONS > SITE SETTINGS**
2. Select **ADVANCED PERMISSIONS** to give permissions individually
3. Click **NEW > ADD USERS**
4. Enter the user name in the **USERS/GROUPS** field or click the **ADDRESS BOOK** to locate them
5. Assign a **PERMISSION**
6. [Optional] customize a **WELCOME E-MAIL**
7. Click **OK**



## Permissions at the List/Library Level

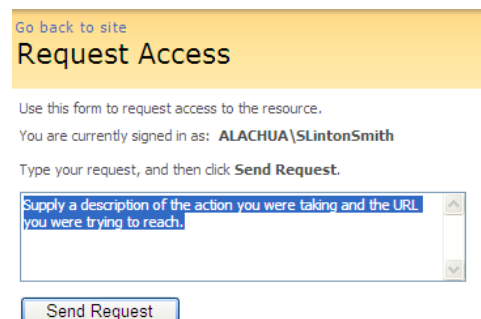
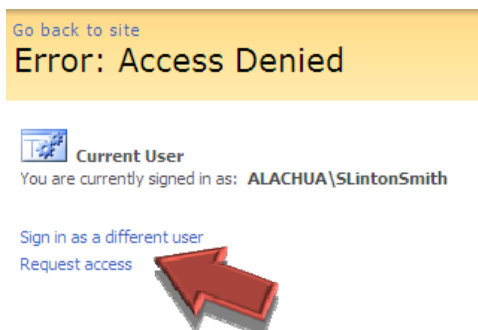
Generally the process for assigning permissions is the same except where to start

- **List Permissions:** From the list toolbar, click **SETTINGS > LIST SETTINGS**
- **Library Permissions:** From the library toolbar, click **SETTINGS > DOCUMENT LIBRARY SETTINGS**
- **Item Permissions:** Click the item's down pointing arrow and select **MANAGE PERMISSIONS**



## Requesting Access

There might be some SharePoint sites that you have no permissions to at all. When you navigate to such a site you will receive an **ERROR: ACCESS DENIED** message. If you feel like you should have access, you can click the **REQUEST ACCESS** link and send a message to the site owner. They will then receive an e-mail and can act upon your request.

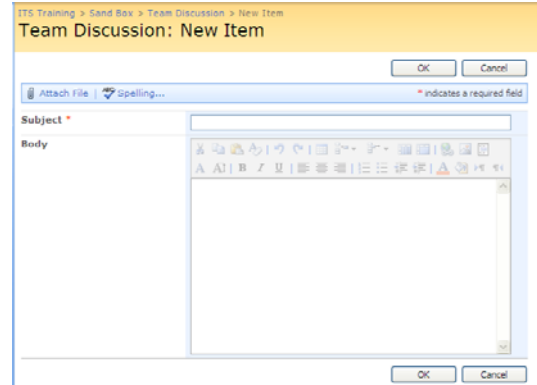


# Discussion Boards

A Discussion Board is a type of list that acts as a forum where users can have text-based discussions about topics by posting queries and receiving answers to those queries. Every topic is visible to all users of the site. Each team site comes with a discussion board called **TEAM DISCUSSION**; but you can create more.

## Create a New Discussion

1. Navigate to your discussion board from the quick launch and click the **NEW** button on the discussion toolbar
2. Give your new topic a **SUBJECT** and type your message in the **BODY** field
3. Click **OK** to post the topic.

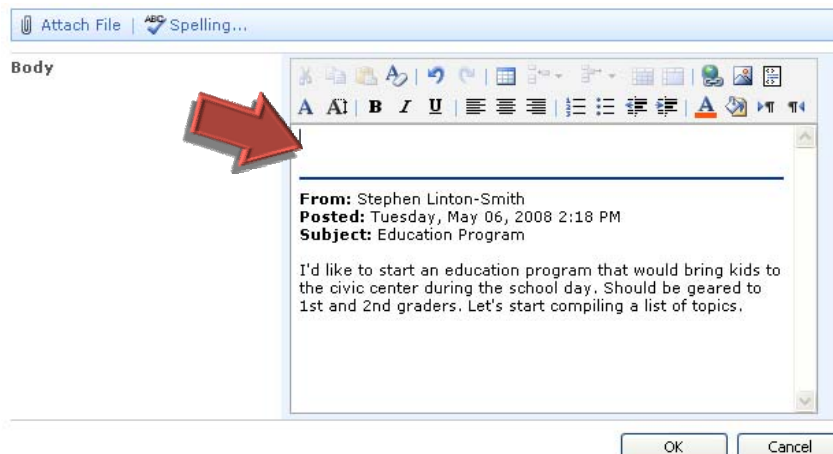
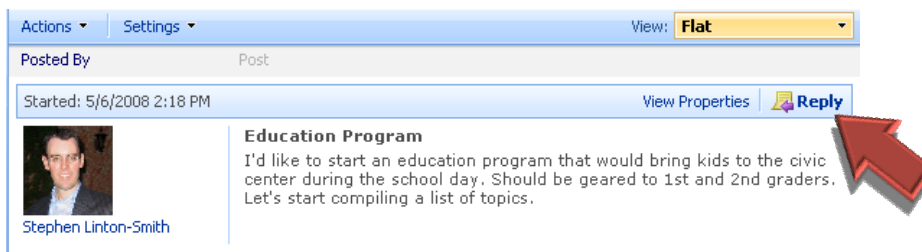


## Edit a Topic

1. Hover over the topic, click the down-pointing arrow then select **EDIT ITEM**
2. Make your changes and click **OK**

## Reply to a Topic

1. Open the topic
2. Click the **VIEW PROPERTIES** link (files can also be attached from here.)
3. Click **REPLY**
4. Click **OK**



## Change the View

- Use the **VIEW** drop-down list to change view options. By default, **TOPICS** are arranged by subject
- The **REPLY** column lists the number of replies to a topic
- Replies can be viewed either:
  - *Flat*: all topics and their replies displayed one below the other
  - *Threaded*: Replies are nested below the topics they are replies to



Actions ▾ Settings ▾ View: **Threaded**

Threading

Edited: 5/6/2008 12:29 PM by Stephen Linton-Smith View Properties Reply

**Pocahontas Statue**  
A statue of Pocahontas has been donated to the city. Where should we put it?

Posted: 5/6/2008 12:47 PM by ws2 View Properties Reply

How about on the Southwest corner just in front of the entrance to the playground?  
Show Quoted Messages

Posted: 5/6/2008 2:01 PM by WS1 Training Room View Properties Reply

I was thinking of a prominent location at the corner of 14th Ave and 21st St  
Show Quoted Messages

## The Calendar

A SharePoint calendar is also another type of list which you can use to manage a central schedule of appointments for a team or department. That calendar can also be connected to Outlook 2007 and managed through that program and the two calendars will be synchronized.

### Create an Appointment

By default, a SharePoint site comes with a calendar, however you can create more calendars as needed. To create a new appointment:

1. Click the **CALENDAR** link on the **QUICK LAUNCH**
2. Click the **NEW** button
3. Fill in the details: **TITLE**, **START TIME** and **END TIME** are required
4. [Optional] **ALL DAY EVENT**, **RECURRENCE**, **WORKSPACE**. If you select **RECURRENCE**, the recurring options automatically appear below the main appointment details



New ▾ Actions ▾ Settings ▾ View: **Calendar**

July, 2008 Expand All Collapse All | Day Week **Month**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	1	2 9:00 AM SharePoint - Level I	3 1:30 PM Excel - Level II	4	5
6	7	8 9:00 AM PowerPoint - Level I	9	10 9:00 AM Outlook - Advanced Calendar	11	12
13	14	15 9:00 AM Word - Level II	16	17	18 9:00 AM SharePoint - Level I	19

Attach File | Spelling... \* indicates a required field

**Title \*** SharePoint - Level I

**Location**

**Start Time \*** 9 AM 00

**End Time \*** 12 PM 00

**Description**

**All Day Event**  Make this an all-day activity that doesn't start or end at a specific hour.

**Recurrence**  Make this a repeating event.

**Pattern**

Daily Every 1 day(s)

Weekly

Monthly

Yearly

**Date Range**

**Start Date** 5/9/2008

No end date

End after: 10 occurrence(s)

End by:

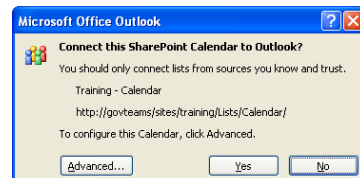
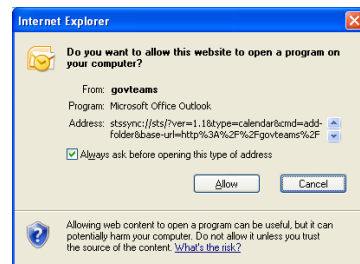
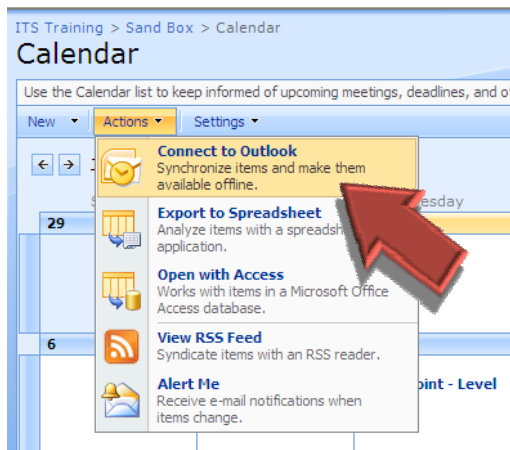
**Workspace**  Use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event.

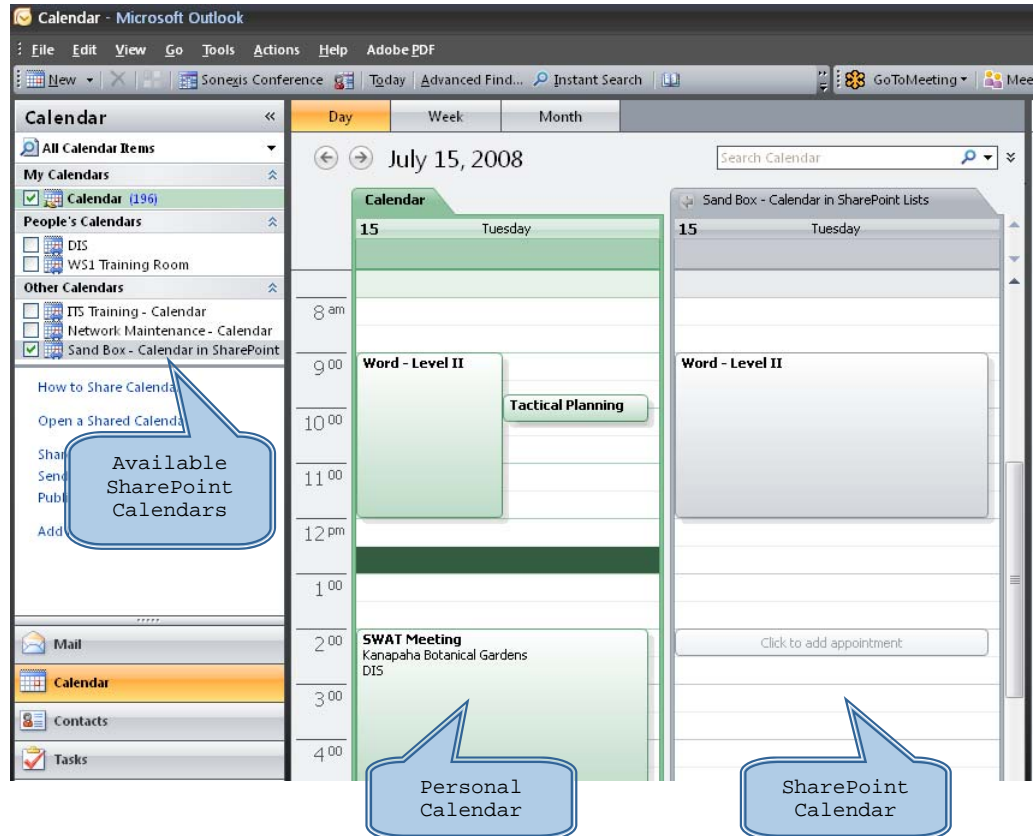
OK Cancel

## Connecting a SharePoint Calendar to Outlook

A SharePoint calendar can be managed from Outlook 2007 by connecting the SharePoint calendar to Outlook. Once the connection is made the SharePoint calendar is visible in Outlook. Changes made from Outlook are automatically *synchronized* with the SharePoint calendar and vice versa.

1. Open the calendar in SharePoint
2. Click **ACTIONS > CONNECT TO OUTLOOK**
3. Click **ALLOW** on the security box
4. When Outlook opens, click **YES** to confirm that SharePoint is a trusted source
5. Outlook displays its own calendar next to the SharePoint calendar (which is listed by the name of the SharePoint site you are connecting from)





### Viewing the Calendar

- From Outlook in the calendars section, click the right-pointing arrow on the SharePoint calendar to display the two calendars side-by-side.
- To hide the SharePoint calendar in Outlook, you deselect its checkbox in the **OTHER CALENDARS** section of the Navigation pane.

### Other Options

- A calendar entry can be copied from one calendar to another by dragging it to its new location.
- Not all the features of Outlook calendars are supported by the SharePoint calendar. For example, Outlook meeting requests are not supported.

### Create an Appointment From Outlook

1. Select a time frame in the SharePoint calendar (from within Outlook)
2. Click **NEW**
3. Enter the appointment details (start/end time, subject, location, etc.)
4. Click **SAVE & CLOSE**
5. The SharePoint site calendar will be updated at its next automatic **SEND/RECEIVE** interval (If you want to update it immediately, click **TOOLS > SEND/RECEIVE > THIS FOLDER**)
6. If you check the SharePoint site calendar and the new appointment does not appear, click the **REFRESH** button on your web browser

## Disconnecting Outlook From SharePoint

If you change your mind and would rather not manage the SharePoint calendar from Outlook, you can disconnect it.

1. From Outlook, right-click the SharePoint calendar in the **OTHER CALENDARS** section and select **DELETE**
2. Confirm the deletion by clicking **YES**

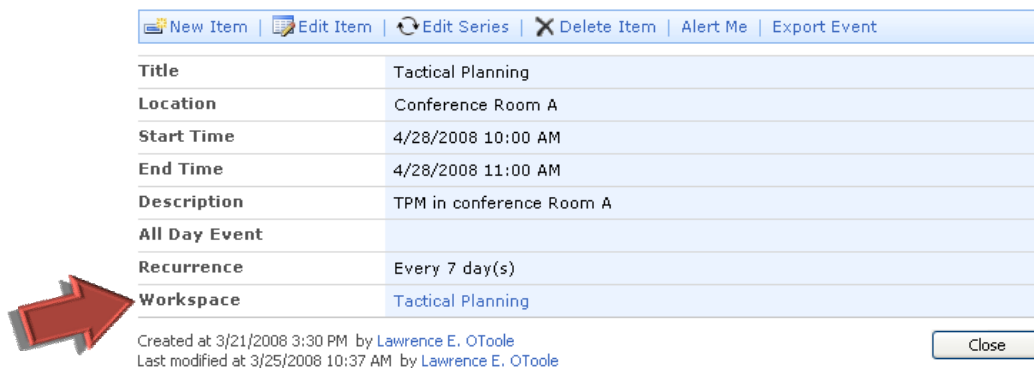
## Meeting Workspaces

Meeting Workspaces allow you to organize meeting agendas, minutes, post-meeting objectives and much more. Depending on the type of meeting, you can choose from several meeting workspace templates.

Basic Meeting Workspace	Blank Meeting Workspace	Decision Meeting Workspace
<ul style="list-style-type: none"> <li>▪ Agenda</li> <li>▪ Attendees</li> <li>▪ Document Library</li> <li>▪ Objectives</li> </ul>	Empty [open to design]	<ul style="list-style-type: none"> <li>▪ Agenda</li> <li>▪ Attendees</li> <li>▪ Decisions</li> <li>▪ Document Library</li> <li>▪ Objectives</li> <li>▪ Tasks</li> </ul>
Social Meeting Workspace	Multipage Meeting Workspace	Recurring Meeting Workspace
<ul style="list-style-type: none"> <li>▪ Attendees</li> <li>▪ Directions</li> <li>▪ Discussion Board</li> <li>▪ Picture Library</li> <li>▪ Things to Bring</li> <li>▪ Image [web part]</li> </ul>	<ul style="list-style-type: none"> <li>▪ Agenda</li> <li>▪ Attendees</li> <li>▪ Objectives</li> </ul>	Can be based on any of the above templates

## Recurring Meeting Workspace

If an existing meeting has a workspace associated with it, it will be listed on the appointment.



The screenshot shows an Outlook appointment window for a meeting titled "Tactical Planning". The appointment details are as follows:

<b>Title</b>	Tactical Planning
<b>Location</b>	Conference Room A
<b>Start Time</b>	4/28/2008 10:00 AM
<b>End Time</b>	4/28/2008 11:00 AM
<b>Description</b>	TPM in conference Room A
<b>All Day Event</b>	
<b>Recurrence</b>	Every 7 day(s)
<b>Workspace</b>	Tactical Planning

At the bottom of the window, it says: "Created at 3/21/2008 3:30 PM by Lawrence E. OToole" and "Last modified at 3/25/2008 10:37 AM by Lawrence E. OToole". A "Close" button is visible in the bottom right corner. A red arrow points to the "Workspace" field.

## Example of Recurring Meeting Workspace

- Previous and future meetings are listed on the left
- **OBJECTIVES** are listed and more can be added - **ADD NEW ITEM**
- **AGENDA** items are listed and more can be added – **ADD NEW ITEM**
- **DOCUMENT LIBRARY** can be used to store minutes or any documents needed during, after or before meeting

**Tactical Planning**  
 Date: 3/31/2008 Time: 10:00 AM - 11:00 AM >>  
 Location: Conference Room A  
[Go to Calendar](#)

**Home**

Select a date from the list below:

- [3/24/2008](#)
- ▶ [3/31/2008](#)
- [4/7/2008](#)
- [4/14/2008](#)
- [4/21/2008](#)
- [4/28/2008](#)
- [5/5/2008](#)
- [5/12/2008](#)
- [5/19/2008](#)
- [5/26/2008](#)
- [6/2/2008](#)
- [6/9/2008](#)
- [6/16/2008](#)
- [6/23/2008](#)
- [6/30/2008](#)

◀ Previous Next ▶

**Objectives**

- 1. Chad - update on connectivity enhancements at Health Center.
- 2. Chad - notification of upcoming changes to ASO network connections.

[Add new item](#)

**Attendees**

Name	Edit	Response
LToole@alachuacounty.us		None

[Manage attendees](#)

**Agenda**

Subject	Owner	Time
Office 2007 Pilot Program	Virgilio Vensamoye	
Video PCs at PIO	Virgilio Vensamoye	
Email issues for PIO office	Virgilio Vensamoye	
Connectivity Updates	Chad Young	

[Add new item](#)

**Document Library**

Type	Name	Modified By
There are no items to show in this view of the "Document Library" document library. To create a new item, click "Add new document" below.		

[Add new document](#)

## Create a Meeting Workspace From SharePoint

1. Begin by creating a new appointment
2. Select the **WORKSPACE** checkbox at the bottom and click **OK**
3. From the new meeting workspace page customize the following
  - **TITLE**
  - **DESCRIPTION** [optional]
  - **URL NAME** [optional]
  - **USER PERMISSIONS**
4. Click **OK**
5. Select your **TEMPLATE** (Basic Meeting, Recurring Meeting, etc)

Attach File | Spelling... \* indicates a required field

**Title \*** Annual Leadership Retreat

**Location**

**Start Time \*** 6/13/2008 9 AM 00

**End Time \*** 6/13/2008 3 PM 00

**Description**

**All Day Event**  Make this an all-day activity that doesn't start or end at a specific hour.

**Recurrence**  Make this a repeating event.

**Workspace**  Use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event.


OK Cancel

## New Meeting Workspace

Use this page to create a new Meeting Workspace site for the event. There are no existing Meeting Workspaces that you can link the event to.

<b>Title and Description</b> Type a title and description for your new site. The title will be displayed on each page in the site.	Title: <input type="text" value="Annual Leadership Retreat"/> Description: <input type="text"/>
<b>Web Site Address</b> 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, <code>http://govteams/sites/training/pocahontas/<i>sitename</i></code>	URL name: <code>http://govteams/sites/training/pocahontas/</code> <input type="text" value="Leadership Retreat"/>
<b>Permissions</b> 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 <b>Use same permissions as parent site</b> , 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: <input checked="" type="radio"/> Use same permissions as parent site <input type="radio"/> Use unique permissions

The meeting workspace is now accessible from the site calendar by clicking on the appointment. From the workspace, **AGENDA** items, **OBJECTIVES**, **DOCUMENTS** and **ATTENDEES** can be added.



### Annual Leadership Retreat

Date: 6/13/2008 Time: 9:00 AM - 3:00 PM >>  
[Go to Calendar](#)

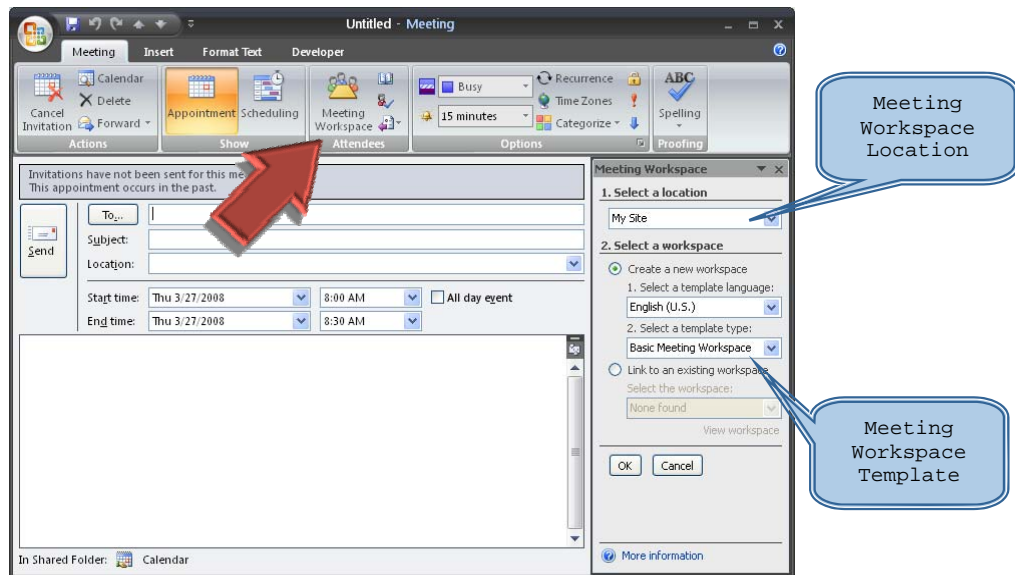
**Home**

<b>Objectives</b> There are no items to show in this view of the "Objectives" list. To create a new item, click "Add new item" below. <a href="#">Add new item</a>	<b>Agenda</b> <table border="1"><thead><tr><th>Subject</th><th>Owner</th><th>Time</th></tr></thead><tbody><tr><td colspan="3">There are no items to show in this view of the "Agenda" list. To create a new item, click "Add new item" below.</td></tr></tbody></table> <a href="#">Add new item</a>	Subject	Owner	Time	There are no items to show in this view of the "Agenda" list. To create a new item, click "Add new item" below.								
Subject	Owner	Time											
There are no items to show in this view of the "Agenda" list. To create a new item, click "Add new item" below.													
<b>Attendees</b> <table border="1"><thead><tr><th>Name</th><th>Edit</th><th>Response</th></tr></thead><tbody><tr><td>Stephen Linton-Smith</td><td></td><td>None</td></tr></tbody></table> <a href="#">Manage attendees</a>	Name	Edit	Response	Stephen Linton-Smith		None	<b>Document Library</b> <table border="1"><thead><tr><th>Type</th><th>Name</th><th>Modified By</th></tr></thead><tbody><tr><td colspan="3">There are no items to show in this view of the "Document Library" document library. To create a new item, click "Add new document" below.</td></tr></tbody></table> <a href="#">Add new document</a>	Type	Name	Modified By	There are no items to show in this view of the "Document Library" document library. To create a new item, click "Add new document" below.		
Name	Edit	Response											
Stephen Linton-Smith		None											
Type	Name	Modified By											
There are no items to show in this view of the "Document Library" document library. To create a new item, click "Add new document" below.													

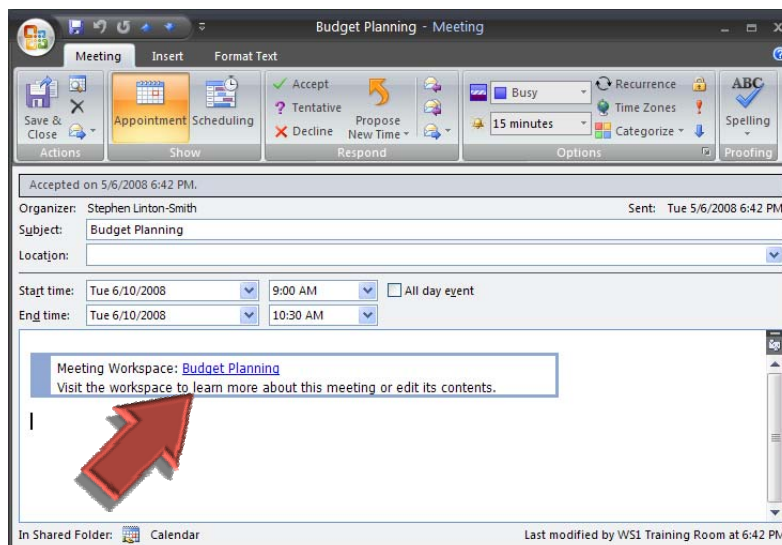
## Create a Meeting Workspace With Outlook Meeting Request

With Outlook, you can create a Meeting Workspace along with a Meeting Request. The workspace will then be available as a link inside the appointment on your Outlook calendar.

1. From Outlook, click **FILE > NEW > MEETING REQUEST**
2. Enter the standard meeting request details: **ATTENDEES**, **SUBJECT**, **START TIME**, **END TIME**, etc.
3. Click the **MEETING WORKSPACE** button
4. From the **MEETING WORKSPACE TASK PANE** on the right select a **LOCATION** and **TEMPLATE** for the workspace
5. Click **OK** and the meeting workspace is created
6. **SEND** the meeting request



The below **MEETING REQUEST** was opened from the Outlook calendar. The **MEETING WORKSPACE** is available by clicking the link in the body of the meeting request.

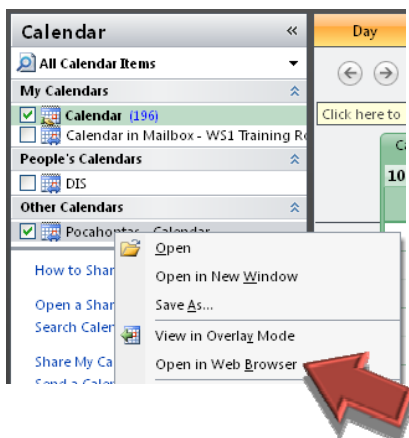


## Go Directly to a SharePoint Calendar from Outlook

1. Right-click on the SharePoint calendar in Outlook
2. Select **OPEN IN WEB BROWSER**

## Check Your SharePoint Calendar Permissions From Outlook

1. From Outlook, click **TOOLS > ACCOUNT SETTINGS**
2. Click the **SHAREPOINT LISTS** tab
3. In the table, look at the entry in the **PERMISSIONS** column for the calendar that you've connected to Outlook



## Libraries

A library is a place where you can create, store, and share files. A default Document Library named **SHARED DOCUMENTS** is already created, but more can be created if you wish. Types of libraries include:

- Document libraries
- Picture libraries
- Wiki page libraries (users can add comments, and link various pages without having to be a registered user)
- Form libraries (You can only create a form library using an XML-compatible program, such as InfoPath)

### Reasons to Use a Document Library

- **Checkout:** The file is reserved for you so that others cannot change it while you are working on it
- **Versions:** A library can store previous versions of files for archiving purposes
- **Alerts:** Sends an e-mail notifying you if a file has been changed by someone else
- **Search:** Libraries can also be set up so that they are searchable

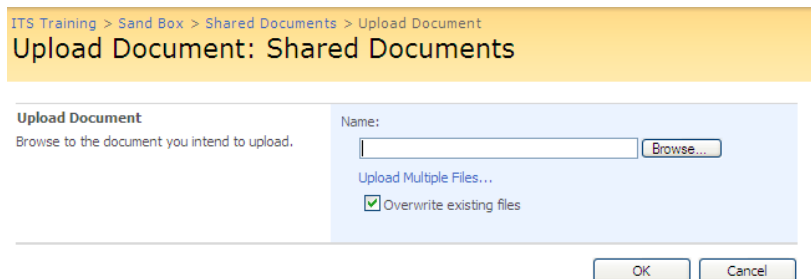
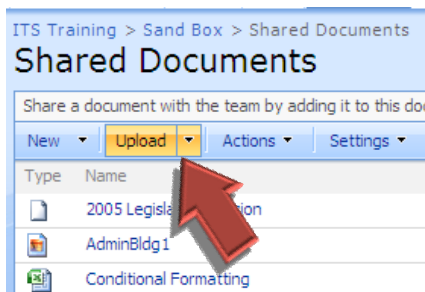
## Adding Files to a Document Library

There are several ways you can add a file to a Document Library: uploading an existing file, creating a new Word document from the library, saving directly from a Microsoft Office application, or using Windows Explorer.

### Uploading a File to a Document Library

For files that are already saved in other locations, you can upload them to your document library

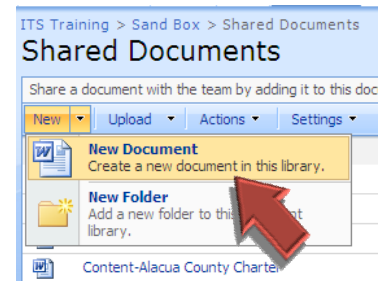
1. Open your library from your Web browser
2. Click **UPLOAD** on the library toolbar (select the down-pointing arrow to **UPLOAD MULTIPLE FILES**)
3. Click **BROWSE** to find the file that you want to add then double-click the file
4. Click **OK**
5. If you do not see your files in the library, refresh the browser



## Creating a Word Document From the Library

You can create a brand new **WORD** document directly from a SharePoint Document Library.

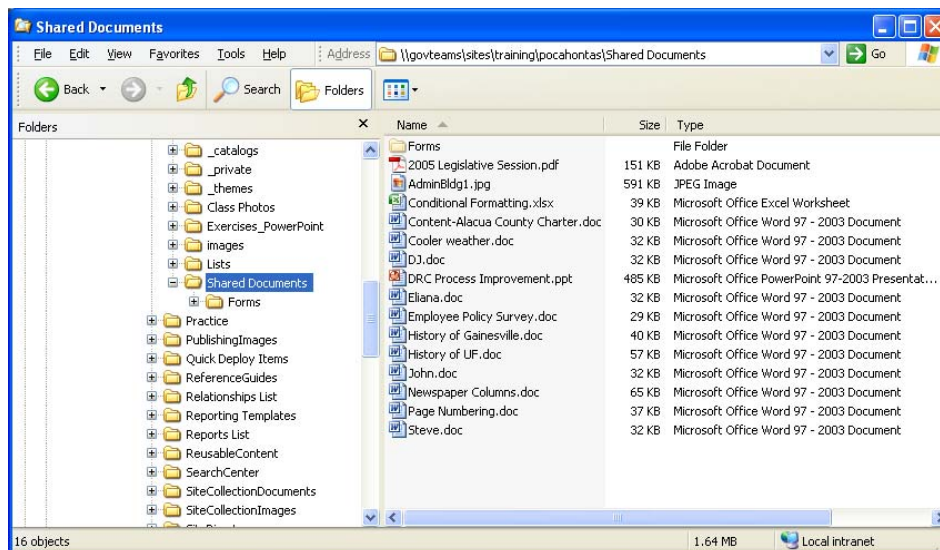
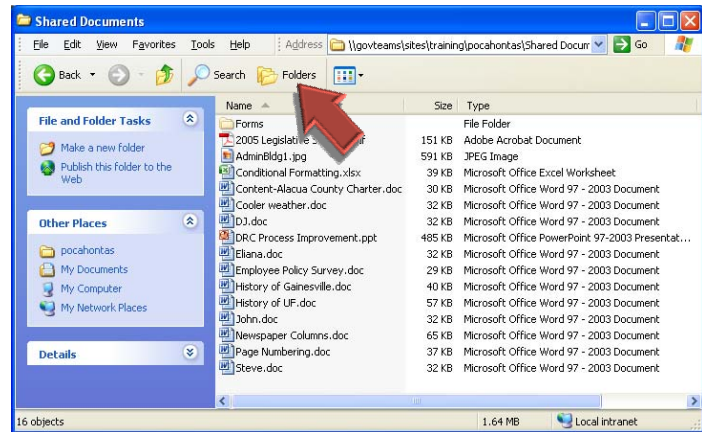
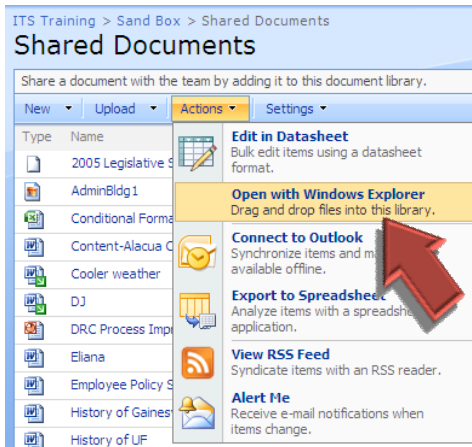
1. On the Document Library toolbar click **NEW > NEW DOCUMENT**
2. A new document will open in **MICROSOFT WORD**
3. Type out your document and click **SAVE**
4. Give the document a **FILE NAME** then click **SAVE** again
5. The file will be saved directly to that SharePoint Document Library



## Managing Files with Windows Explorer

SharePoint can display most libraries in Windows Explorer view. This makes it easier to rename files, delete files or move to other folders. To view a library with Windows Explorer:

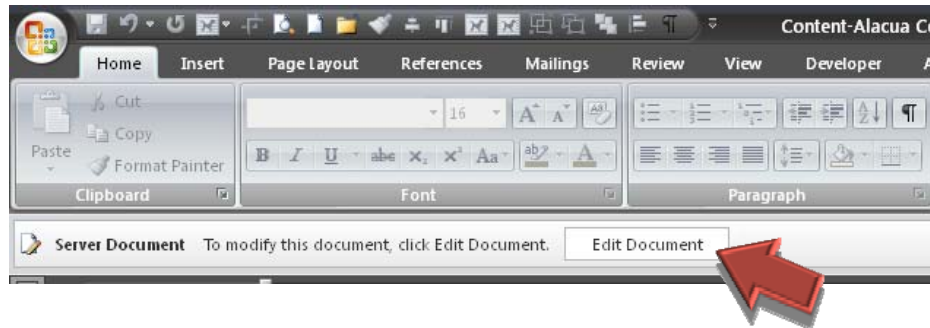
1. Navigate to the desired library
2. Click **ACTIONS > OPEN WITH WINDOWS EXPLORER**
3. From **WINDOWS EXPLORER**, click **FOLDERS** on the toolbar to display the entire folder structure on the left



## Viewing or Editing a File in a Document Library

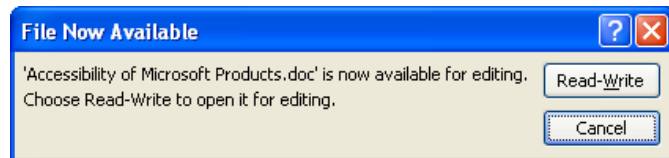
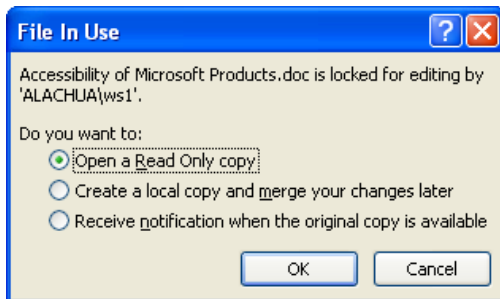
Once a file is already saved to a document library, you can view or edit the file by from the library.

1. Open your library from your Web browser
2. Click the link for the file
3. The file will open in its associated application
4. If you need to edit the file and you have the appropriate permissions (**CONTRIBUTE** or above), click the **EDIT DOCUMENT** button just below the Microsoft Word ribbon.



If a file is already being edited by someone else, you will receive a **FILE IN USE** message and you have three options:

- **OPEN A READ ONLY COPY**
- **CREATE A LOCAL COPY AND MERGE YOUR CHANGES LATER**
- **RECEIVE NOTIFICATION WHEN THE ORIGINAL COPY IS AVAILABLE.** When this file becomes available, you will receive the file now available dialog box.



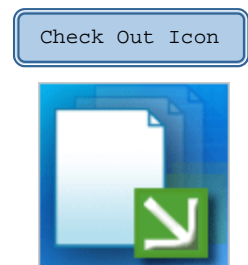
Take note that the **"lock out"** period only lasts for 15 minutes since the last time the editor saved the file. When you expect to be editing a file for longer than 15 minutes, it is recommended that you **CHECK OUT** the file.

## File Check Out & Versioning

### Checking a File In & Out

Checking out a file ensures that nobody else makes changes to the file while you are revising it. The file remains in a read-only state for everyone else. Others will know that the file is checked out when they see a green arrow on the file icon.

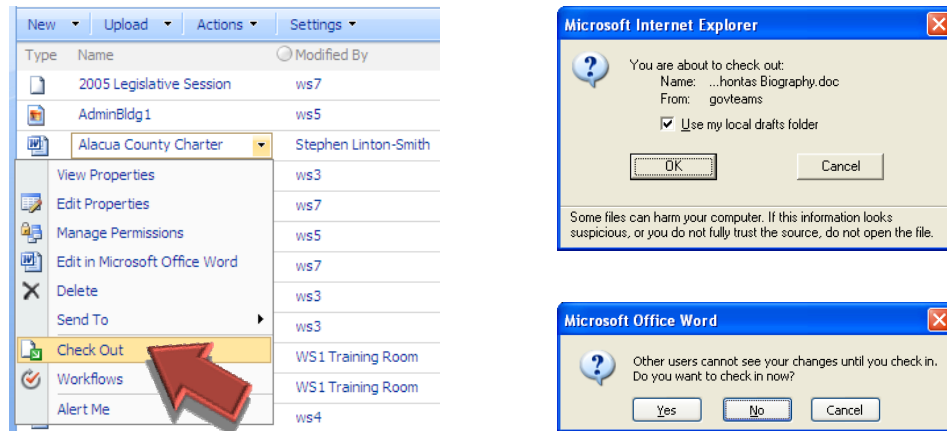
When you save and close the file, you will be prompted to check the file back in. However, you have several options related to check in that will be discussed below.



## Check Out a File

To check out a file from a document library, follow the directions below:

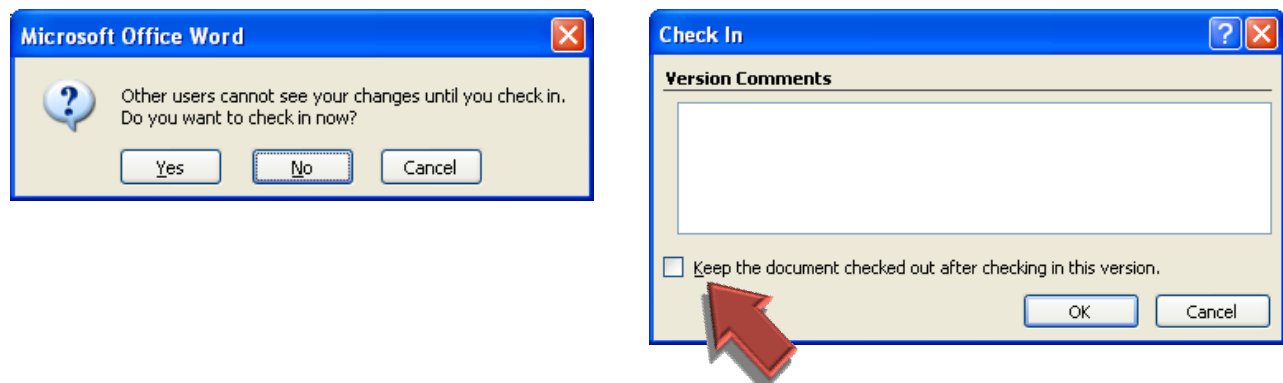
1. Navigate to your desired document library
2. Hover your mouse over the file name, click down-pointing arrow and select **CHECK OUT**
3. A dialog box will notify you that your file is about to be checked out to your **LOCAL DRAFTS FOLDER**
4. A green arrow will now appear over that file's icon letting everyone else know that it is checked out
5. Open the file by clicking its name
6. After saving and closing the file, you will be prompted to check it back in



## Check In a File

After saving and closing a checked out file, you will be prompted to check it back in. At this point you have three options:

- You can click **NO**. In this situation, you may wish to maintain the file's checked out status as you may not be completely finished editing the file and need to return to it later before making it available again to everyone else.
- You can click **YES**. However, this presents the other two options:
  - Fully check the document back in.
  - By checking the checkbox **KEEP THE DOCUMENT CHECKED OUT AFTER CHECKING IN THIS VERSION**, you can update the file that everyone else sees with your new changes but leave the file checked-out until you are completely finished with your revisions.
- With the **VERSION COMMENTS** field, you can describe the changes you made.
- Document libraries can be set so that choosing to edit a file automatically checks it out. If you are uploading a file to such a library, that file is checked out to you when you first upload it.



## Versioning

You can enable version history for a library so that a file is automatically archived when a newer version of that file is saved. This helps prevent accidental overwriting of files and maintains the history of a file.

1. To turn versioning on for a document library go to **SETTINGS > DOCUMENT LIBRARY SETTINGS**
2. Click on **VERSIONING SETTINGS** then in the **DOCUMENT VERSION HISTORY** section choose to **CREATE MAJOR VERSIONS** or **CREATE MAJOR AND MINOR VERSIONS**
3. To view version history, hover over the file name and click **VERSION HISTORY**
4. The history lists version numbers, modification dates, authors of versions and comments

ITS Training > Sand Box > Shared Documents > Settings

### Customize Shared Documents


**List Information**  
 Name: Shared Documents  
 Web Address: http://govteams/sites/training/pocahontas/Shared Documents  
 Description: Share a document with the team by adding it to this document

**General Settings**

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

**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



ITS Training > Sand Box > 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



ITS Training > SupvOrientation


### SupvOrientation

New Upload Actions Settings View

Type Name Modified By

SOT ITS Presentation	Stephen Linton-Smith
ITS-Intern...	Lisa A. Bramos
ITS-HelpDe...	Lisa A. Bramos
ITS-DeptInt...	Lisa A. Bramos
ITS-Comput...	Lisa A. Bramos

View Properties  
 Edit Properties  
 Manage Permissions  
 Edit in Microsoft Office PowerPoint  
 Delete  
 Send To  
 Check Out  
**Version History**  
 Workflows  
 Alert Me



ITS Training > SupvOrientation > SOT ITS Presentation > Version History

### Versions saved for SOT ITS Presentation.pptx

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

No.	Modified	Modified By	Size	Comments
10.0	3/3/2010 4:47 PM	Stephen Linton-Smith	994.7 KB	
9.0	3/3/2010 2:08 PM	Lisa A. Bramos	1004.1 KB	
8.0	3/3/2010 1:34 PM	Stephen Linton-Smith	994.7 KB	
7.0	3/3/2010 1:26 PM	Lisa A. Bramos	996.9 KB	
6.0	3/2/2010 10:43 AM	Stephen Linton-Smith	987.5 KB	
5.0	3/2/2010 10:29 AM	Stephen Linton-Smith	984.3 KB	
4.0	3/1/2010 10:45 AM	Stephen Linton-Smith	984.3 KB	
3.0	2/26/2010 9:57 AM	Lisa A. Bramos	981.5 KB	
2.0	2/25/2010 11:01 AM	Stephen Linton-Smith	981.5 KB	
1.0	2/24/2010 5:40 PM	Stephen Linton-Smith	980.9 KB	

You can view past versions of the file by clicking on the date of the file. If you would like to make any previous version of this file the current version, click the down-pointing arrow on the file date and select **RESTORE**. You will then confirm that you want to replace the current version with the selected version.

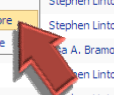
ITS Training > SupvOrientation > SOT ITS Presentation > Version History

### Versions saved for SOT ITS Presentation.pptx

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

No.	Modified	Modified By	Size	Comments
10.0	3/3/2010 4:47 PM	Stephen Linton-Smith	994.7 KB	
9.0	3/3/2010 2:08 PM	Lisa A. Bramos	1004.1 KB	
8.0	3/3/2010 1:34 PM	Stephen Linton-Smith	994.7 KB	
7.0	3/3/2010 1:26 PM	Lisa A. Bramos	996.9 KB	
6.0	3/2/2010 10:43 AM	Stephen Linton-Smith	987.5 KB	
5.0	3/2/2010 10:29 AM	Stephen Linton-Smith	984.3 KB	
4.0	3/1/2010 10:45 AM	Stephen Linton-Smith	984.3 KB	
3.0	2/26/2010 9:57 AM	Lisa A. Bramos	981.5 KB	
2.0	2/25/2010 11:01 AM	Stephen Linton-Smith	981.5 KB	
1.0	2/24/2010 5:40 PM	Stephen Linton-Smith	980.9 KB	

View  
**Restore**  
 Delete



Message from webpage

You are about to replace the current version with the selected version.

OK Cancel

# Alerts

To save you from constantly monitoring a SharePoint site for changes, you can setup an **ALERT**. With alerts, you can choose to be notified via e-mail should any changes be made to a document library, library items, lists, list items, discussion boards, etc.

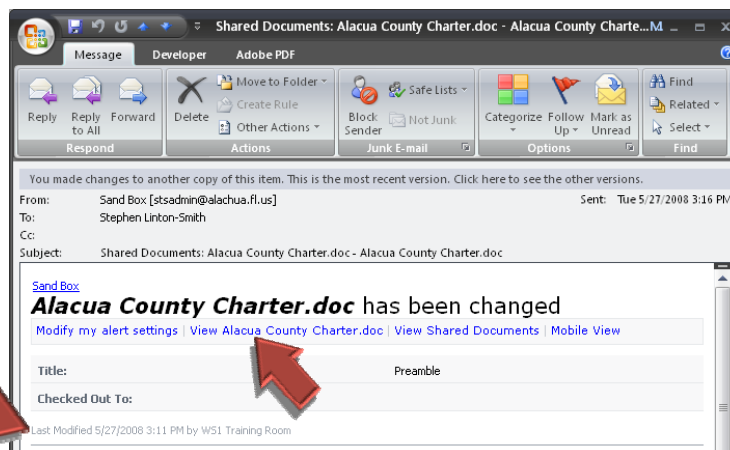
## Setting an Alert

In this example, we will setup an alert on a specific file in a document library.

1. Navigate to the desired document library
2. Hover over the file name, click the down-pointing arrow and select **ALERT ME**
3. Select your desired settings from the **NEW ALERT** page. Settings include:
  - **ALERT TITLE:** The text here will appear in the subject of the notification e-mail
  - **SEND ALERTS TO:** You can add other users to this alert
  - **SEND ALERTS FOR THESE CHANGES:** For alerts setup for individual files, it is best to choose the second option **SOMEONE ELSE CHANGES A DOCUMENT A DOCUMENT**. The other options are for setting up alerts for an entire document library
  - **WHEN TO SEND ALERTS:** Immediately, daily summary, weekly summary
4. When a change is made, the e-mail notification will list when the change was made, by which user and provide a link to the document so that you can view it immediately

<b>Alert Title</b> Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.	Shared Documents: Alacua County Ch
<b>Send Alerts To</b> You can enter user names or e-mail addresses. Separate them with semicolons.	Users: Stephen Linton-Smith
<b>Send Alerts for These Changes</b> 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: <input type="radio"/> Anything changes <input checked="" type="radio"/> Someone else changes a document <input type="radio"/> Someone else changes a document created by me <input type="radio"/> Someone else changes a document last modified by me
<b>When to Send Alerts</b> Specify how frequently you want to be alerted.	<input checked="" type="radio"/> Send e-mail immediately <input type="radio"/> Send a daily summary <input type="radio"/> Send a weekly summary Time: Wednesday 7:00 PM

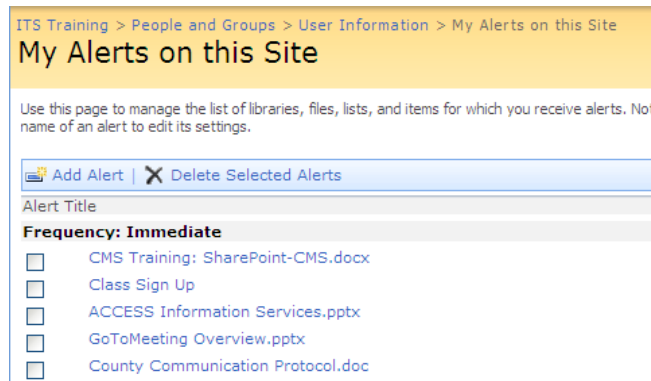
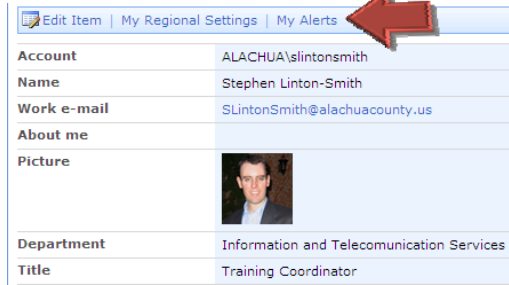
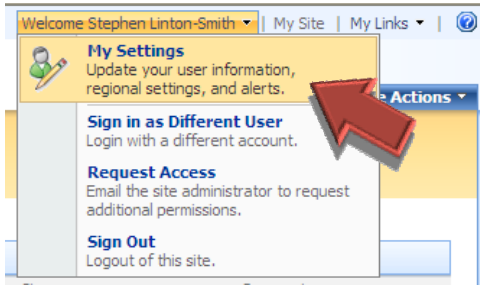
OK Cancel



## Removing Alerts

If you decide you no longer need an alerts, you can delete any of all of them. To remove an alert:

1. Navigate to the site where you have an alert setup
2. Go the **WELCOME** menu in the top right corner and select **MY SETTINGS** from the drop down
3. Select **MY ALERTS** from the toolbar
4. Place a check next the alerts you want to discontinue and click **DELETE SELECTED ALERTS**



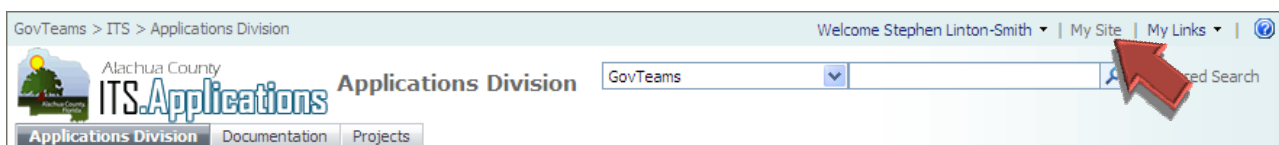
## My Site

A SharePoint **MY SITE** is a personal SharePoint site with similar functionality for sharing and collaborating as a **TEAM SITE**. You can use your **MY SITE** as a personal document storage location or share files with others if you do not have the necessary permissions on a **TEAM SITE**. With you **MY SITE** you can:

- Manage your own documents, tasks, and contacts
- Share information about yourself
- View information about other users
- Keeping track of colleagues, your site memberships, and managers

## Accessing Your My Site

Each SharePoint site has a link to your **MY SITE** in the top-right corner to the page. Clicking on the **MY SITE** link will take you to the personal site of the of the person currently listed on the **WELCOME** menu.




## My Home

The **MY HOME** tab is your *private* page to help you customize your site. Some of the key functions on this tab are described below.

- **Get Started with My Site:** This Web Part is a central location where you can update your profile
  - **DESCRIBE YOURSELF:** Used to fill out various profile details.
    - a description
    - a picture of yourself
    - list your responsibilities, skills, and interests
    - Customize who sees the above information with the **SHOW TO** settings
    - When finished, scroll to the top of the page click **SAVE AND CLOSE**
- **RSS Viewer:** With this Web Part you can configure Really Simple Syndication (RSS) feeds
- **SharePoint Sites:** From this web part you can:
  - Access all documents you've created or modified on any site
  - Access your tasks
  - Upload documents to other SharePoint sites (document libraries, lists, or discussion boards you created in SharePoint.)
- **My Calendar:** You can synchronize this Web Part to your Outlook calendar.
- **Colleague Tracker:** With this Web Part you can add a list of your colleagues and access information about them. For example, it notifies you if a colleague uploads a new document and allows you to track a colleague's events.
  - To add a colleague so you can ... Click **COLLEAGUE TRACKER**
  - From the my colleagues page click add colleagues
  - Type the name of a co-worker in the type names field [First Last]
  - Select your colleague from the suggested list
  - The **PRIVACY AND GROUPING** section enables you to specify who can view details of the colleague you're adding to your **MY SITE**. You can also choose to give your colleague access to content in your workgroup and to specify the group to which the colleague must be added.
  - Click **OK**
  - An entry for that colleague is added to your my colleagues page.

My Site > Edit Details  
**Edit Details**

Save and Close | Cancel and Go Back

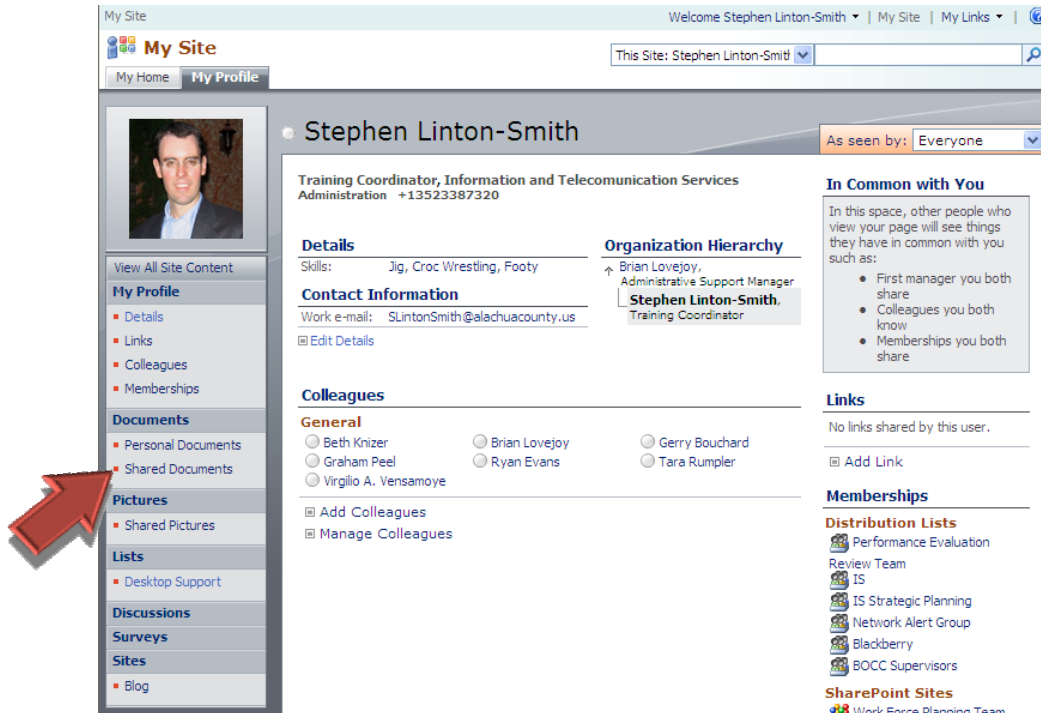
Name:	Stephen Linton-Smith	Show To: Everyone
Title:	Training Coordinator	Show To: Everyone
About me:	<p>Provide a personal description expressing what you would like others to know about you.</p>	Show To: Everyone
Picture:	 Choose Picture   Remove	Show To: Everyone
Responsibilities:	<p>Include things related to current projects, tasks or job description. (e.g. Sales, Project XYZ, Marketing Driver)</p>	Show To: Everyone
Skills:	<p>Jig, Croc Wrestling, Footy</p> <p>Include skills used to perform your job or previous projects. (e.g. C++, Public Speaking, Design)</p>	Show To: Everyone
Past projects:	<p>Provide information on previous projects, teams or groups.</p>	Show To: Everyone
Interests:	<p>Share personal and business related interests.</p>	Show To: Everyone
Schools:	<p>List the schools you have attended.</p>	Show To: Everyone
Birthday:		Show To: Everyone

## My Profile

Your *public* page that contains information that, by default, all users can view. This page stores your profile, memberships, links and documents. When you visit the **MY PROFILE** page for other users, the **IN COMMON WITH you** Web Part lists memberships and colleagues you share.

## Quick Launch

Note that the quick launch looks very similar to other team sites. Two exceptions include the **MY PROFILE** (discussed in the previous section) and under documents you have a **PERSONAL DOCUMENTS** library. By default this library is only visible to the owner of the **MY SITE**.



## My Links

Through your **My Links** you can place links to other SharePoint sites/pages or Internet links. Links can also be assigned to groups.

### Adding a My Site Link to your My Links

- Open a page on your My Site that you want to add to your links
- Select **Add to My Links**
- If you wish, you can change the link title or the group the link will be assigned to
- Click **OK**
- A link to your **MY HOME** page is added to **MY SITE**
- Clicking **MY LINKS** will display all the titles of the links you have saved